






# Pulse Release Notes – 16.06

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## Watershed Items

Watershed items are the most important changes in the release. They are indicated in the release notes by a gold star 

### Service

-  Further Integration with Outside Escalated Service Requests
-  Export Service Request List to Excel with Current Filters Applied
-  Recurrent Meeting Agenda and Minutes

### Client Portal

-  Client Portal Surveys

## Service



### Further Integration with Outside Escalated Service Requests

Outside Escalation is a powerful means of passing work on to a third party provider that is also running a Pulse Service Desk. In previous versions, Responses were only passed between partners when linked to a status change. With 16.06, it is now possible to pass all Responses between systems so that they are available for viewing on any of the Service Requests in the Outside Escalation chain. It is also possible to pass attachments between partners.

There are security and privacy concerns related to sending information to your partners, so this option is not enabled by default. If you would like us to turn it on, please [contact us](#).

The screenshot displays two browser windows side-by-side, both showing the Pulse Service Desk interface. The left window shows incident OE17099, and the right window shows incident 024465. Both incidents are titled 'Aircon not working' and have a reporting date of 15 Jul 2016. The interface includes a 'Details' tab, a 'Reporting Requester' field (Dharshan Ramdutt), and a 'Financial Summary' section. The activity log at the bottom of each window shows a sequence of actions such as 'Attachment uploaded', 'note on requestor', and 'Status set to In Progress'. Blue arrows point from the activity log of the left incident to the corresponding activity log of the right incident, illustrating the integration of responses between the two systems.

Timestamp	User	Action
15 Jul 2016 12:52:39	Admin Admin	Attachment uploaded -- '1925564_2016-04-28 10.14.58.jpg' --
15 Jul 2016 12:52:08	Agent Agent	Admin Admin: -- Attachment Uploaded --
15 Jul 2016 12:51:50	Admin Admin	'19905_2016-04-29 09.32.37.jpg' --
15 Jul 2016 12:51:07	Admin Admin	note on requestor
15 Jul 2016 12:50:45	Agent Agent	Admin Admin: note on provider
15 Jul 2016 12:50:11	Admin Admin	Status set to In Progress
15 Jul 2016 12:48:34	Agent Agent	SKTCinemaAgent: (Age: 193h15m)



## Export Service Request List to Excel with Current Filters Applied

The Service Request List is often the most useful way to filter and view Service Requests. Want to see all open Service Requests for a client? A single dropdown selection will deliver what you need. Looking for all faults logged in a date range that is now closed? Again, a few simple clicks and you have what you need.

In 16.06 we have now made it possible to export your selection to Excel. Click the Excel icon and wait a few seconds for Pulse to prepare the file. Once it is ready, the icon changes and you can download it when you are ready.

The screenshot shows the Service Request List interface. The top navigation bar includes a search box labeled "Client Search" and various utility icons. Below the navigation bar, there is a summary bar showing "13 Jobs" and a blue Excel icon with a green plus sign, which is highlighted by a blue arrow. The main table displays service requests with columns for FireBar, Ref No, Deadline, Client, Title, and Description. The table contains four rows of data, each with a progress bar on the left. The first row is for "Seneca Optimus" with title "yututh" and description "ghrgrhgt". The second row is for "Jerry Springer" with title "Very noisy" and description "I found the wa too noise". The third row is for "ABC Consulting Group" with title "I cant work" and description "My computer doesnt want t boot up". The fourth row is for "ABC Consulting Group" with title "My PC wont switch on" and description "Please help, I, get the swirly".


FireBar	Ref No	Deadline	Client	Title	Description
Stopped Overdue [Time to Update]Target: 3 May 2016 15:16 PM (General SLA)	000392		Seneca Optimus	yututh	ghrgrhgt
Stopped Overdue [Time to Update]Target: 3 Dec 2015 11:19 AM (General SLA)	000390		Jerry Springer	Very noisy	I found the wa too noise
No SLA (Age: 5399h56m)	000389		ABC Consulting Group	I cant work	My computer doesnt want t boot up
No SLA (Age: 5399h57m)	000388		ABC Consulting Group	My PC wont switch on	Please help, I, get the swirly



## Recurrent Meeting Agenda and Minutes

We are very excited to include meeting agendas and minutes right inside the Pulse application. By using a recurrence pattern, the agenda will continue to evolve from one meeting to the next, with resolved items falling away from subsequent agendas and unresolved ones remaining.



Attendees can be added from the list of contact people at the client, Pulse consultants, and free text entries.



## Seneca Optimus - / Agenda (Service / Agenda)

Client Details ▾ Sales ▾ **Service ▾** Bookings ▾ Projects ▾ Inventory ▾ Client Financials ▾

[Back to Agenda List](#)

Agenda - 1 - 29 Jul 2016 10:00:00  



Agenda Name  \*

Agenda Type  ▾ \*

Agenda Attendees	Header	Lines
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Available *Consultants / Contact Persons* for Agenda

- Amy Walters
- Bruce McCleod
- Caty Tappin
- Demo Client
- Finn MacDonald
- Francis Smith
- Fred Holt
- Hans Castelyn
- Helen Malambo
- Helen O'Reilly
- Injozi Tech
- Jack Willets





Other Agenda Attendees

Firstname

Surname

There is a header section for items such as apologies and previous minute acceptance.

Agenda - 1 - 29 Jul 2016 10:00:00  

Agenda Name:  \*Notes:

Agenda Type:  \*

Agenda Attendees | **Header** | Lines

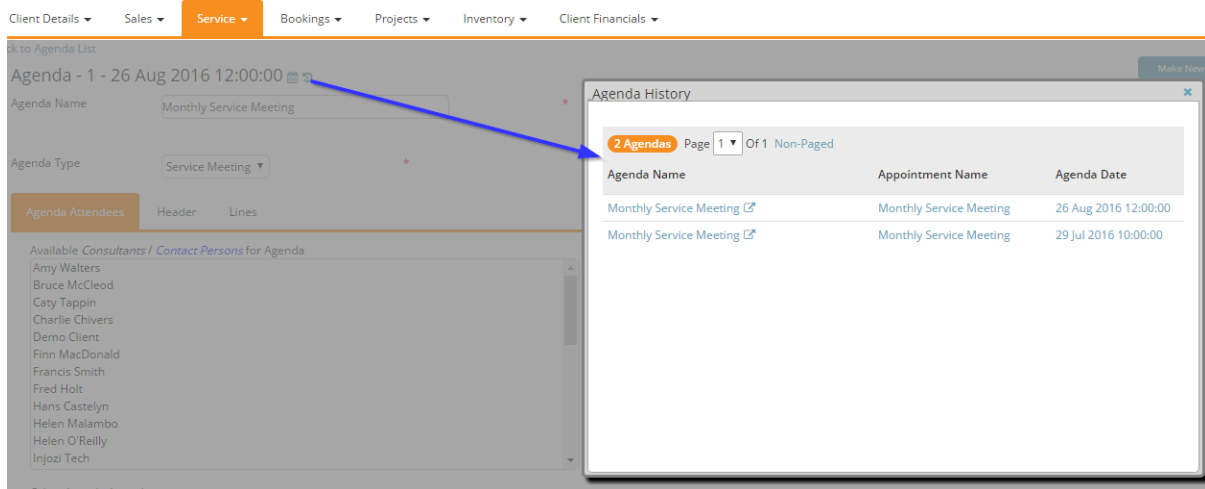
List Order	Agenda Item	Note	Status
<input type="checkbox"/> 1	<input type="text" value="Apologies"/> <input type="text" value="Apologies from those not present"/>	<input type="text" value="Cheryl Fernandes sends her apologies as she is on leave. Mark Barnes is no longer working for Seneca Optimus"/>	<input type="text" value="Yes"/>
<input type="checkbox"/> 2	<input type="text" value="Previous Minutes"/> <input type="text" value="Read and accepted by all present"/>	<input type="text" value="All agreed"/>	<input type="text" value="Yes"/>
<input type="checkbox"/> 3	<input type="text" value="Service Items"/> <input type="text" value="All service items discussed and agreement"/>		<input type="text" value="* Status *"/>

The meeting items are in the lines section, where status, due dates, ownership, and action are all available to set.

Agenda Attendees | Header | **Lines**

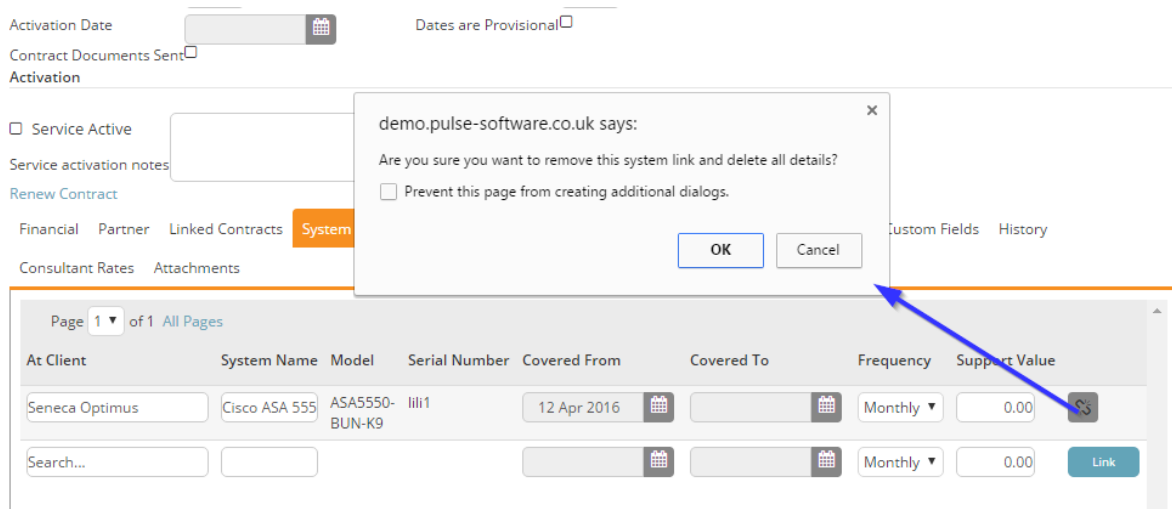
List Order	Agenda Item Type	Agenda Item	Note	Action	Status
<input type="checkbox"/> 1	Issue	<input type="text" value="SLA's not being met"/> <input type="text" value="P1 SLA's are not being met to the"/>	<input type="text" value="ACME Network Services have committed to addressing this"/>	<input type="text" value="None required."/>	<input type="text" value="Resolved"/> <input type="text" value="15 Jun 2016"/> <input type="text" value="Charlie Chivers"/>
<input type="checkbox"/> 2	Issue	<input type="text" value="Site down on 3 July 201"/> <input type="text" value="A complete connectivity"/>	<input type="text" value="A U-Systems cable failure led to the downtime."/>	<input type="text" value="ACME to investigate failover options and report back at the next meeting."/>	<input type="text" value="Unresolved"/> <input type="text" value="26 Aug 2016"/> <input type="text" value="* Owner *"/>
<input type="checkbox"/> 3	Discussion Item	<input type="text" value="Advice on backup serve"/> <input type="text" value="Seneca Optimus would like some"/>	<input type="text" value="It was agreed to implement an offsite backup using Microsoft"/>	<input type="text" value="ACME to supply a quote and project plan."/>	<input type="text" value="New"/> <input type="text" value="21 Jul 2016"/> <input type="text" value="Charlie Chivers"/>

Previous minutes are available directly on the agenda so that everything is available for review at the meeting or afterwards.



### Confirmation when Unlinking Systems from Contracts

We have added a confirmation dialogue to the action of unlinking systems from contracts.



## **Financials**

### **Fully Allocated Tick Box in Supplier Payments can be Hidden**

Not everyone uses the fully allocated functionality in Supplier Payments and removing it helps to unclutter the form. Let [us know](#) if you would like it removed.

### **Attachments on Credit Notes and Invoices**

Continuing with our roll out of attachments on all documents, we have extended them to credit notes and invoices (both customer and supplier).

# Inventory

## Search for Hidden Systems

It has always been possible to search for hidden systems on a client record, but not across all systems held in Pulse. We have now made it possible to include hidden systems in the top search.

The screenshot shows the Pulse Inventory search interface. At the top, there is a 'Client Search' bar. Below it, an 'Advanced Search' modal is open, containing three search criteria: 'Ref Nos (comma-separated for multiple)', 'Quote' (with a dropdown menu showing 'cisco asa'), and 'Customer Reference'. Below the modal, there is a main search bar with a search icon and a link labeled '[Also Show Hidden Systems]'. A blue arrow points to this link. Below the search bar is a table with the following data:

Model Number	Current Location	Currently Held By	Description	Generate Job
5A5550-BUN-K9	ABC Consulting Group		Cisco ASA Router For ADSL	<a href="#">Generate</a>
5A5550-BUN-K9	ABC Consulting Group		Cisco ASA Router For ADSL	<a href="#">Generate</a>
5A5550-BUN-K9	Seneca Optimus		Cisco ASA Router For ADSL	<a href="#">Generate</a>
5A5550-BUN-K9	Main Warehouse		Cisco ASA Router For ADSL	<a href="#">Generate</a>



## Client Portal



### Client Portal Surveys

Pulse Surveys have had another improvement. Instead of starting off linked to a Service Request they can start linked to a system to be filled in on the client portal. Only if the score for the survey is lower than a configured value will a ServiceRequest be generated.

Surveys can be used to have maintenance checklists completed against equipment at remote locations, for example. This allows non-technical staff to run a series of tests against the equipment, and a Service Request is automatically logged for a technician if required.

Welcome Rosebank Nouveau Cinema Filtering for - 'Rosebank Nouveau Cinema' Logout

**CLIENT SEARCH**

  
 Include Children  
 All  
 Mine

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[Home](#)  
[View Service Requests](#)  
[New Service Request](#)

[My Details](#)  
[CDC Listing](#)

Snack Survey 01				
Snack Survey 01	Rosebank Snack Kiosk System 1	RBSKS001	✔	
Snack Survey 01	Rosebank Snack Kiosk System 2	RBSKS002	✘	<a href="#">Edit</a>
Ticket Survey 02				
Ticket Survey 02	Rosebank Snack Kiosk System 1	RBSKS001	✘	<a href="#">Edit</a>
Ticket Survey 02	Rosebank Snack Kiosk System 2	RBSKS002	✘	<a href="#">Edit</a>

### Remove the Forgot Password Link on the Client Portal

In certain installations, the client portal is used as a branch login for internal requests, with a shared login. One person resetting the password then locks other users out, so it is now possible to hide the 'Forgot Password' link.

**pulse**  
BUSINESS SOFTWARE

Username   
Password

Remember me

## Core



### Monitoring

Pulse does a lot of monitoring behind the scenes to look after your installation so that you do not have to. This release includes dramatic improvements to this monitoring, and while much of this will be invisible to you, our responsiveness and reliability improvements should be noticeable.

### General Consistency Improvements

As always there are numerous small consistency and usability improvements in this release.