





# Pulse Release Notes – 14.10

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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

-  New client columns and functionality available in the SRList
-  Change to assignment of Teams and Consultants on new Service Requests

## Service



### New client columns and functionality available in the SRList

Four new columns are available on the SRList:

Parent Client, Parent Client Account Number, Top-Level Client and Top-Level Client Account Number

To add them click “Customise” at the top of any SRList in Pulse.

These are all sortable and filterable.

Additionally, we have made it possible to hide the Client Account Number column.

FireBar	Ref No	Deadline	Client	Top Level Account No	Top Level Client
Stopped Overdue[Time to Update]Target: 2 Oct 2014 14:34 PM (General SLA)	000356		Seneca Optimus		
	000355	24 Sep 2014 14:28:00	sample client 1106		

**Installation Columns** Save

Field name	Show	Dropdown
Firebar	<input checked="" type="checkbox"/>	
Deadline date	<input checked="" type="checkbox"/>	
Responsible Consultant	<input type="checkbox"/>	<input type="checkbox"/>
Reporting Contact Person	<input type="checkbox"/>	<input type="checkbox"/>
Experiencing Contact Person	<input type="checkbox"/>	<input type="checkbox"/>
Assigned Consultant	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Assigned Team	<input type="checkbox"/>	<input type="checkbox"/>
Account No	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Client	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Parent	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Parent Account No	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Top Level Client	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Top Level Account No	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Status	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Reporting date	<input type="checkbox"/>	

FireBar	Ref No	Deadline	Client	Parent Account No	Parent	Top Level Account No	Top Level Client
Stopped Overdue[Time to Update]Target: 2 Oct 2014 14:34 PM (General SLA)	000356		Seneca Optimus				Seneca Optimus
Overdue[Time to Update]Deadline: 16 Sep 2014 7:28 AM	000355	24 Sep 2014 14:28:00	sample client 1106			SC 1106	sample client 1106
Stopped Overdue[Time to Update]Target: 4 Sep 2014 14:58 PM (General SLA)	000354		Seneca Optimus				Seneca Optimus
Overdue[Time to Update]Deadline: 25 Jul 2014 9:19 AM	000353	25 Sep 2014 15:00:00	ACE Motors - Bristol	SC 100	ACE Motors HQ	SC 100	ACE Motors HQ



## Change to assignment of Teams and Consultants on new Service Requests

We have clarified and simplified the way that Pulse decides which Team and Consultant a new Service Request should be assigned to.

The default behaviour is to assign it to the default service consultant and team on the client. Alternatively it can be set to assign it to the logged in Consultant, and the logged in Consultant's main team.

Please contact us if you would like clarity on the above, as assignment is an important usability feature in Pulse.

The screenshot shows the Pulse software interface for a service request. The top navigation bar includes 'Installation', 'Contracts', 'Contact Person', 'System', 'Checklists', and 'Quotes'. Below this, there are tabs for '2 Installations', 'Open Installation Listing', and 'Log New Installation'. A table lists installations with columns for 'FireBar', 'Ref No', 'Reporting Date', 'Title', 'Description', 'Assigned', 'Status', 'Customer Invoice', and 'Supplier Invoice'. A modal window titled 'Ref No: New Installation' is open, showing fields for 'Status', 'Team', '1st Line', and 'Consultant' (set to 'Finn Potter (13) [At Work]'). The 'Service Request' tab is active, showing a title 'The fish-fryer has lost its internet connection' and details for 'Reporting Date', 'Deadline', 'Reporting User', and 'Experiencing User'. A red arrow points to the 'Log New Installation' button in the top navigation bar.

## Prevent closing a Service Request until the One Time Pin Sign-off is received

It is possible to configure Pulse to require an OTP to be entered before SR's with configured categorisations can be closed. This can be over-ridden by users of a particular clearance level.


Please contact us if you are interested in setting this up on your Pulse installation.

The screenshot shows the Pulse software interface for a task. The top navigation bar includes 'Ref No: 000795' and 'No SLA (Age: 00h14m)'. Below this, there are tabs for 'Status', 'Work Stopped', 'Team', 'Projects', and 'Consultant' (set to 'Admin Admin (31)'). A red box highlights the 'Client Sign-Off' tab in the navigation bar. The 'Task' section shows a task titled 'tes' with details for 'Start Date', 'Deadline', and 'Dealer Contact'. A red arrow points to the 'Client Sign-Off' button in the navigation bar.

## Financials

### Select multiple line items for deletion at once in the Purchase Order

It is now possible to select all line items for deletion in the Purchase Order. You can deselect the few that should remain after selecting them all with a single click.

	Line	Catalogue Item	Description	VAT Type	Qty	Price I/E	Disc %	Amount	VAT Amount	Total
<input checked="" type="checkbox"/>	Copy 1	FW-7541A Compact Des		WW20%	6	365.00	0	2190.00	438.00	2628.00
<input checked="" type="checkbox"/>	Copy 2	Carriage/Delivery		WW20%	1	22.00	0	22.00	4.40	26.40
<input checked="" type="checkbox"/>	Copy 3	4G Cradlepoint XPOL-A0		WW20%	8	55.00	0	440.00	88.00	528.00

### Business Unit included on Client Import Spreadsheet

The client import now includes a field for the Business Unit. Download the import spreadsheet from Pulse and use it to import new Clients with their Business Units. Pulse will generate the correct client for the client, based on the Business Unit definition.

#### Basic Client Import Utility (No Balances)

File to Upload:  No file chosen

Choose an existing File:

It is strongly recommended that you import data to your test site first, as mistakes are difficult to rectify later

- **Download Template for Client Import.**
- Account number is the key field.
- Pulse uses it to tell if the line holds a new client or an update with a matching account number.
- **Do not leave blank account number fields or have duplicates.**
- Do not try to import with a file that has empty rows, filters, hidden columns.
- Do not alter the column names or order of columns.
- Column AC. LatitudeLongitude. Format is decimal eg -26.14339, 27.97961
- Column AD onwards. Category-X should be used to set client categories where X=Category name.
- Column AD onwards. Custom-Y should be used to set client custom fields where Y=Custom field name.
- Column AD onwards. Remove if you are not importing custom fields or categories.

### Business Unit restrictions on Child / Parent clients

When setting the parent client Pulse will filter the parent selection by the Business Unit of the child (if the child has a Business Unit).

**Update Client Details** Save

Client Name	Maria's Fish n Chip Shop *	Trading As	
Account No		NameCode	
Telephone	555-1232 *	Fax	
Contact Email		Reply to Address	
Website		VAT Reg Number	

Hidden  Credit Hold

Parent Client  Clear

Alternate Contract  Clear

**Only Clients with the same Business Unit are returned**

Contact Info **Roles** Sales Service Financial Banking Category/Custom Field Attachments Week Day Holiday

History

Current Client - Service Recipient and Debtor Financials.  
     Full Client  Site

Supplier - Supplier for Inventory and Creditor Financials  
 Supplier - Call Bill  
 Warehouse - Inventory Warehouse  
 Outside Escalation Provider - Service Provider for Service

Value Added Reseller - Contract Value Added Reseller  
 Reseller - Contract Reseller  
 Finance Provider - Finance Provider  
 Venue - Bookable location

Project Role

Language

Business Unit

## Inventory



### Prevent moving of van stock to Consultants

Please talk to us if you'd like to limit moving van stock to consultants based on clearance level settings. For instance, you may want only engineers to be able to have van stock, and financial users to be removed from the stock movement selections.

## Sales

### The Expected Closing Date can be mandatory on existing Opportunities

We have made it possible for the expected closing date to be mandatory on existing Opportunities. It will not be mandatory on the first creation of the Opportunity.

Let us know if you'd like this to be activated on your installation.

The screenshot shows the 'Update Opportunity Ref. No 2491' page in the Safestore (SAFESTOR) system. The page is divided into several sections:

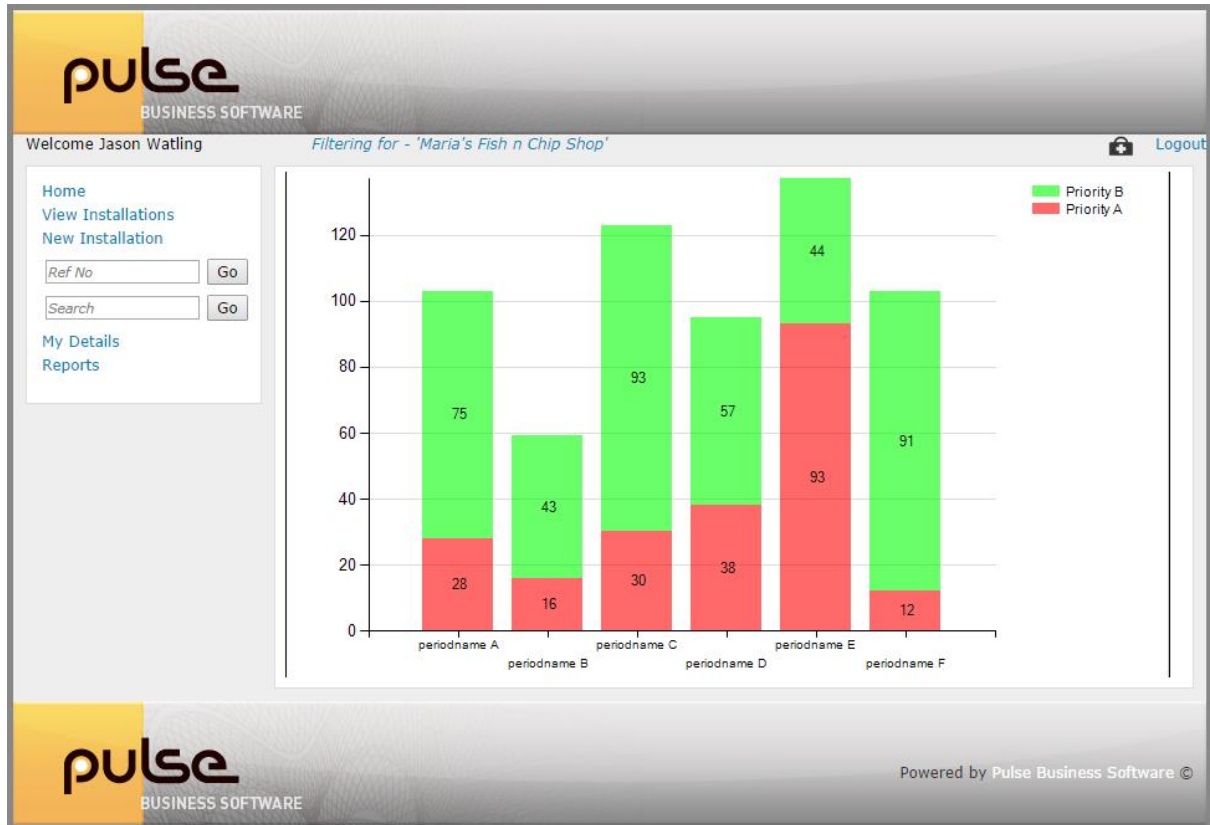
- Opportunity Details:** Includes fields for Opportunity Type (Direct - New Business), Opportunity Subject (Quote for a FTTC upgrade on the primary connection w...), and Opportunity Description (Quote for a FTTC upgrade on the primary connection with a Cisco 881 router and replacing the existing back up Zyxel router with the previous primary Cisco 887 router).
- Identified On:** 13 Jun 2014 00:00
- Expected Job Active Date:** 31 Jul 2014 00:00
- Expected Closing Date:** 31 Jul 2014 00:00 (This field is highlighted with a red box in the original image).
- Logged by:** Consultant Karolina Byperrek on
- Workflow:** Opportunity Status is set to 'Live'.
- Stage Conditions:** Includes a checkbox for 'PO Received, All Order Paperwork Received'.

The current stage is 'Shortlist (80% Probability of Closing)'.

## Client Portal

### Drill-downs now available in Reports

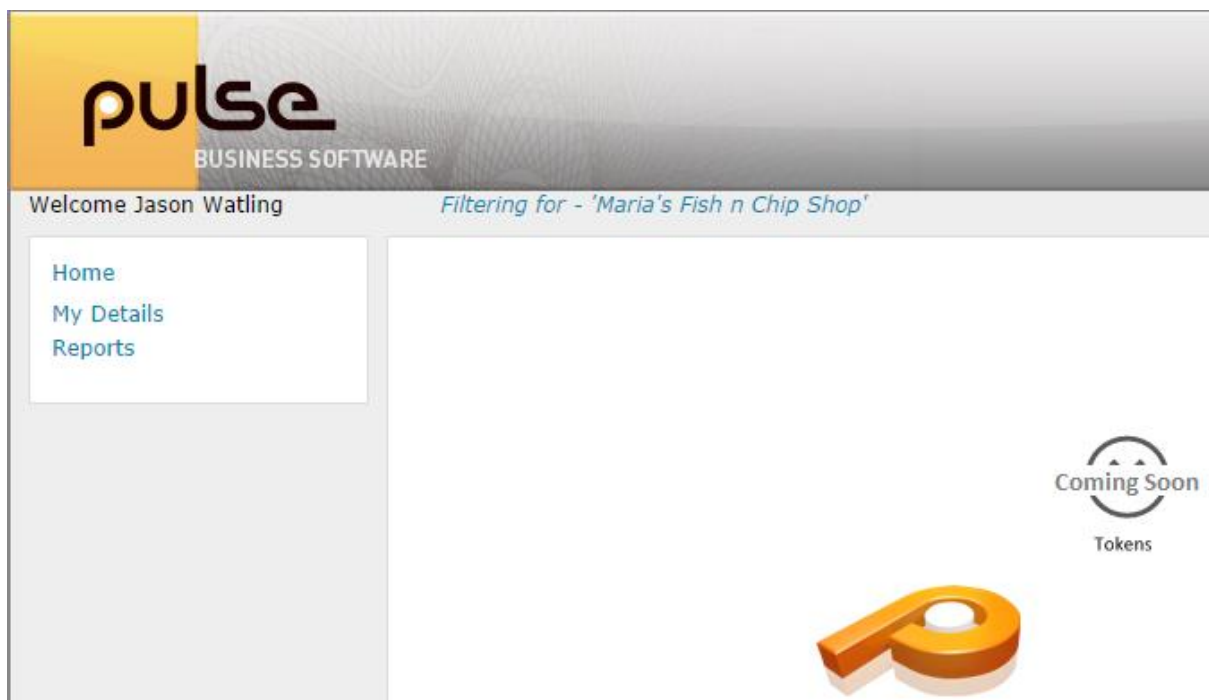
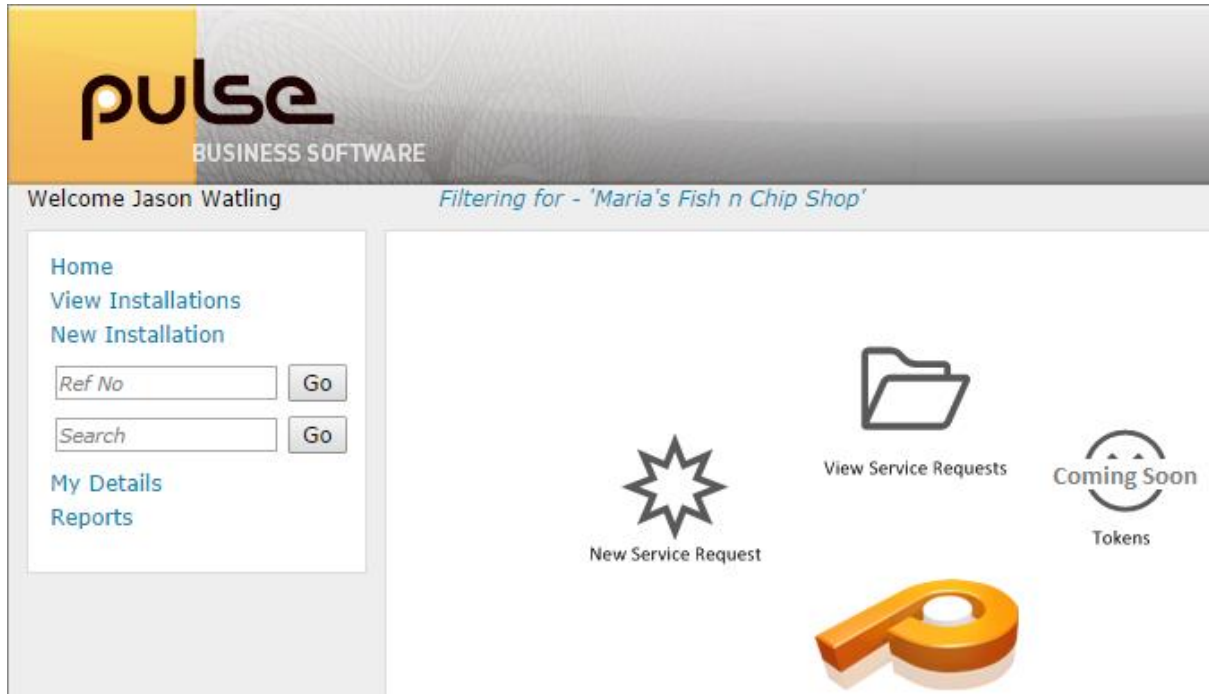
Reports on the client portal now support drill downs. For instance, the below report can support drilldowns for each priority per period, if required.



### Ability to hide Service Request functionality

It is possible to remove various parts of Service Request functionality from the client portal. This is useful, for instance, if you are using it merely as a means to provide reporting to your customers.

Log, View and Search functionality enabled vs removed:





Response functionality enabled vs removed:

New (1) In Progress (1) Waiting for Customer (0) Completed (0) All (2)

**Fewer Details**

**INSTALLATION DETAILS - 000311**

No SLA (Age: 11811h14m) **Date Logged** 04 Jun 2013 09:34:16 **Target Date**

**Reporting User** Jason Watling **Experiencing User** Jason Watling

**Title** Audit

**Description** Audit

**Current Status** New

**CUSTOM FIELDS**

Customer Reference

**CATEGORIES**

Category	Support
Call Type	Fault - Hardware
Severity	Standard Change - Minor

**RELATES TO**

**Contract**

**System**

**Status** - No Status Change - ▼

**Response**

Save

**RESPONSE HISTORY**

Date	Person	Details
04 Jun 2013 09:34:16	Sheila Tubman	-- Installation Logged --

New (1) In Progress (1) Waiting for Customer (0) Completed (0) All (2)

**Fewer Details**

**INSTALLATION DETAILS - 000311**

No SLA (Age: 11811h14m) **Date Logged** 04 Jun 2013 09:34:16 **Target Date**

**Reporting User** Jason Watling **Experiencing User** Jason Watling

**Title** Audit

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**CUSTOM FIELDS**

Customer Reference

**CATEGORIES**

Category	Support
Call Type	Fault - Hardware
Severity	Standard Change - Minor

**RELATES TO**

**Contract**

**System**

**RESPONSE HISTORY**

Date	Person	Details
04 Jun 2013 09:34:16	Sheila Tubman	-- Installation Logged --