Pulse Release Notes – 15.04

Watershed Items

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

Service

- Turn a normal Service Request into a parent with children

- SLA Timers can be reset by a collection of response types

- A new distinction between domestic and business customers

- Service Request statuses can be set by the answers in a customer survey

Projects

- Project task and budget snapshots to hold project history

Service

Turn a normal Service Request into a parent with children

In the past it has been necessary to define a client as the one against which parent Service Requests can be raised. It is still possible to use Pulse in this way, but if you'd prefer a simpler implementation whereby any existing Service Request can be set as a parent, let us know.
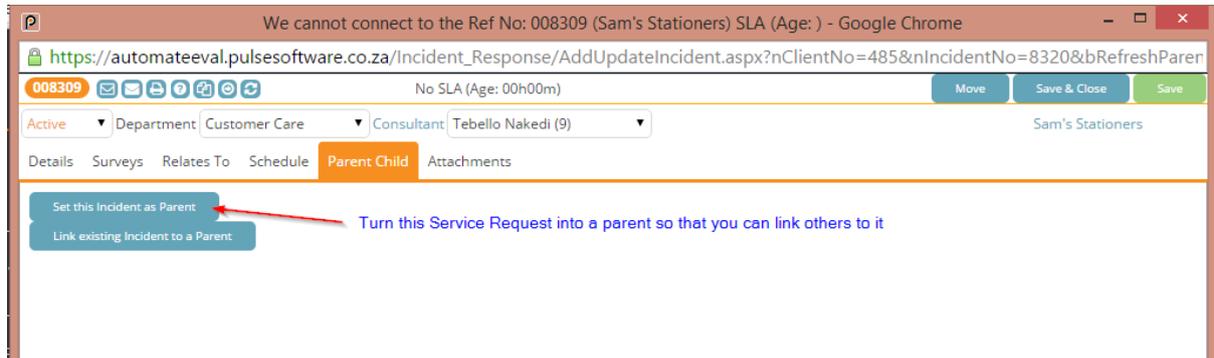
SLA Timers can be reset by a collection of response types

You are no longer limited to a single response type to reset an SLA timer on a Service Request. A number of response types can be set to qualify for meeting an SLA, so let us know if this interests you.
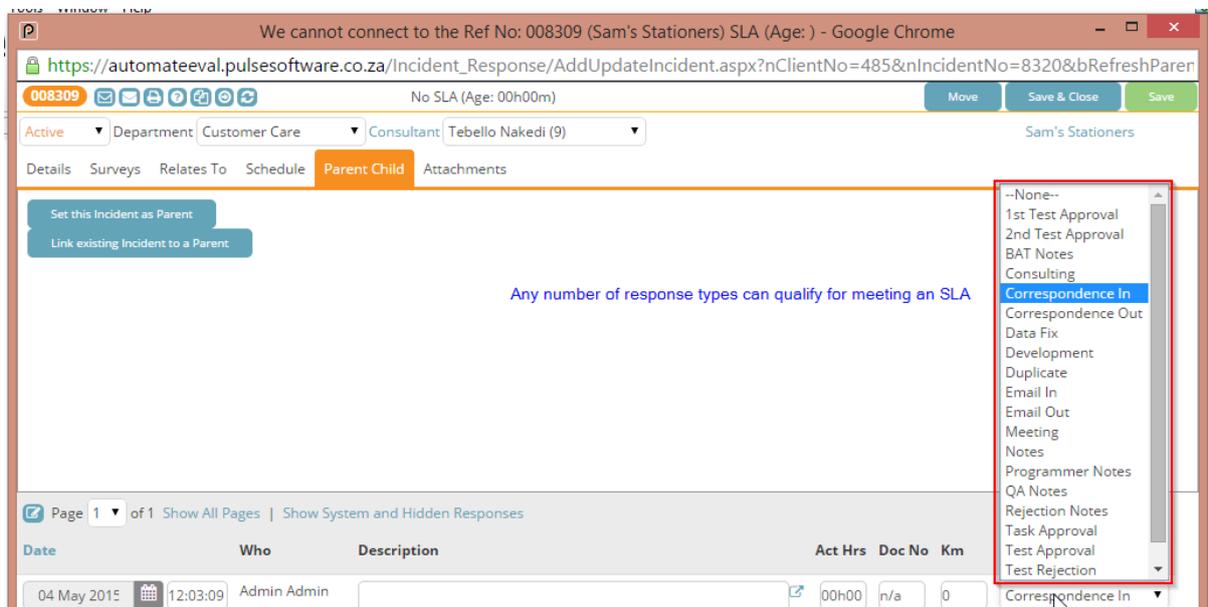
A new distinction between domestic and business customers

Clients can now be designated as domestic or business customers. When capturing a domestic customer the client and contact person records are combined so that you do not need to capture duplicate data.

This is available via the quick capture interface, and changes will be rolled out to other interfaces (such as the main client update interface) in coming releases.

Service Request statuses can be set by the answers in a customer survey

It is now possible to link the answers to survey questions to Service Request statuses. For instance, asking the question "Is the reported issues resolved?" can link the answer "Yes" to the status "Customer confirms resolved", and the answer "No" to the status "Customer rejects resolution".

Furthermore, Pulse can send reminder emails to the end user if the survey is not completed. This is typically useful in an environment where surveys are being used for customer signoff on work completed.

Not applicable option in surveys

Answers can be designated as "not applicable". This is especially useful when using the scoring component of surveys, as it will not count the value of the question towards the score total.

New Setting to make categories mandatory on client update

In the past making categories mandatory on the client also made them mandatory on the client portal. We have now split this so that either can be mandatory, or none.

Financials

Quote statuses can control locking of line items

Quote statuses can be set to lock / unlock line items on the quote. This is useful to ensure that changes made to a quote must go through the standard approval process again.

Attachments available on quote revisions

When making a revision of a quote, the attachments are now available on the revision (and subsequent revisions). This means you no longer have to reupload attachments when making a quote revision.

Projects

**Project task and budget snapshots to hold project history**
Project tasks and budgets are now snapshot once daily. This allows reporting on the state of the project (timelines) and budget (income and expenditure) over the lifetime of the project.

Core

Update reporting user on existing open Service Requests when changing the default contact person
When changing the default for new incidents, it is sometimes useful to also update the reporting user on open incident where the reporting user is the original default. Pulse will now prompt you, asking if you would like the reporting user to be updated.

The same prompt will appear when moving a contact person who is the default to another client that already has a default contact person.
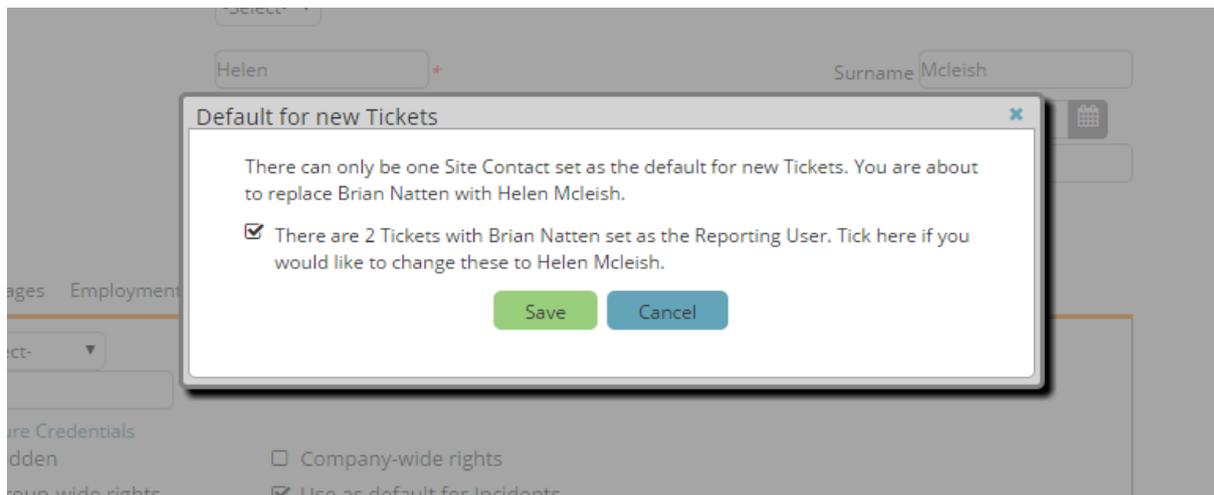
General Consistency Improvements
We continue to bring improvement to Pulse to deliver a consistent look and feel for the new skin across all interfaces.