Pulse Release Notes – 15.11

Watershed Items

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

Service

- Linking related Service Requests together for reporting and service delivery
- Emails and attachments available directly on the main Service Request interface
- Various SMS notification improvements
- Client sign off/one-time pins available directly on surveys

Projects

- Project budgets now include linked Service Requests in their calculations

Client Portal

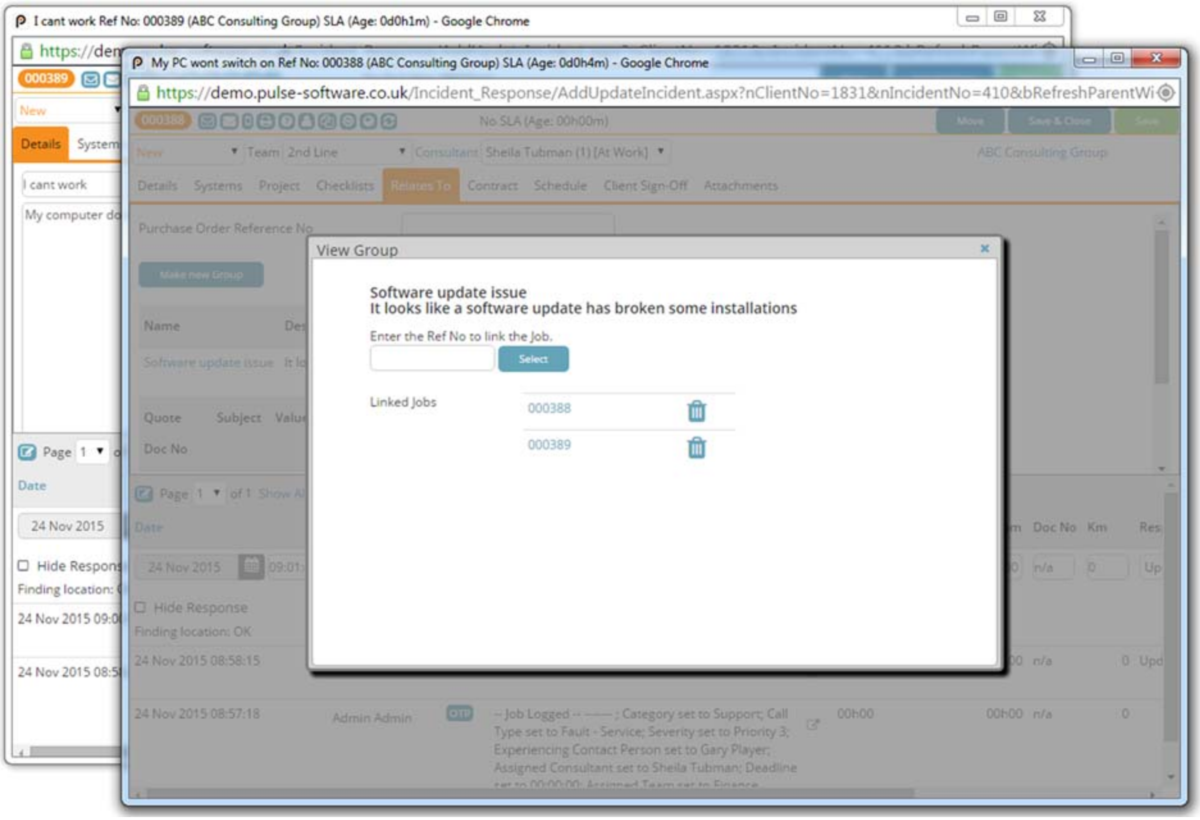
- Allow contract selection by your customers when logging a Service Request

Core

- Password expiry customisable, and can be turned off entirely

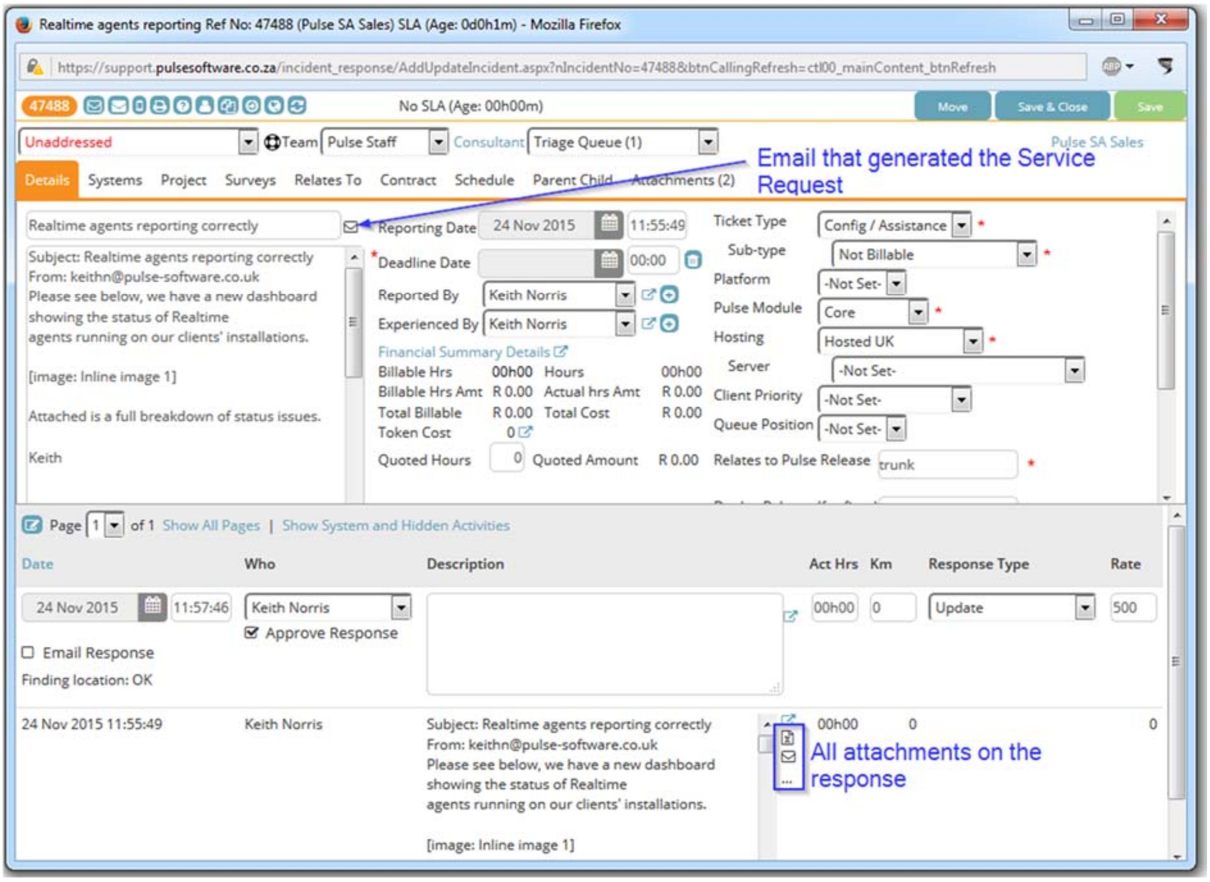
Service

Linking related Service Requests together for reporting and service delivery
Multiple Service Requests are sometimes related to the same delivery of work without needing to interact in terms of workflow. Projects and parent/child relationships may be more than is required. Service Request groups fill this gap, allowing you to group two or more Service Requests together.



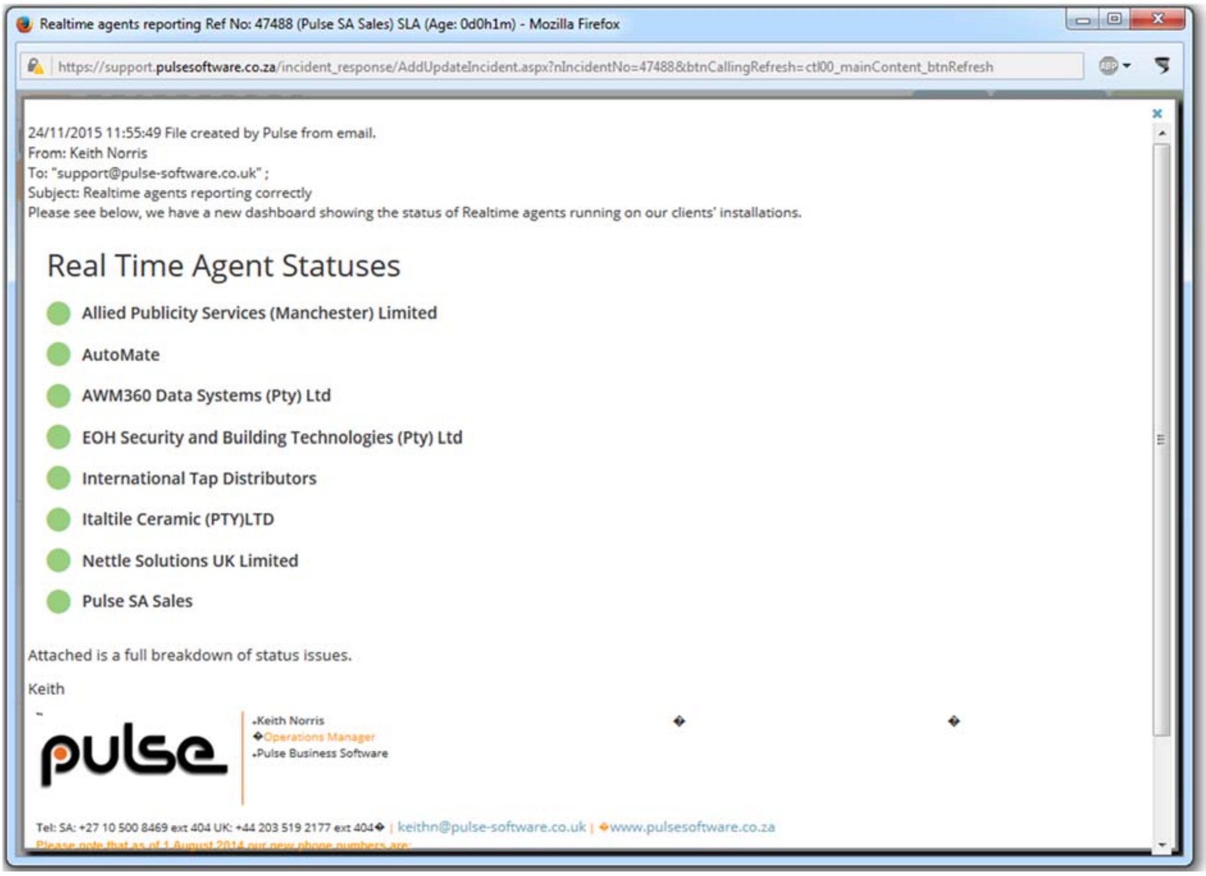
Emails and attachments available directly on the main Service Request interface

Pulse has always attached emails and their attachments to the Service Request and made them available on the attachments tab. This improvement now displays them next to the Response they apply to and if the Service Request was generated from an email, it is available next to the title.



Continued…

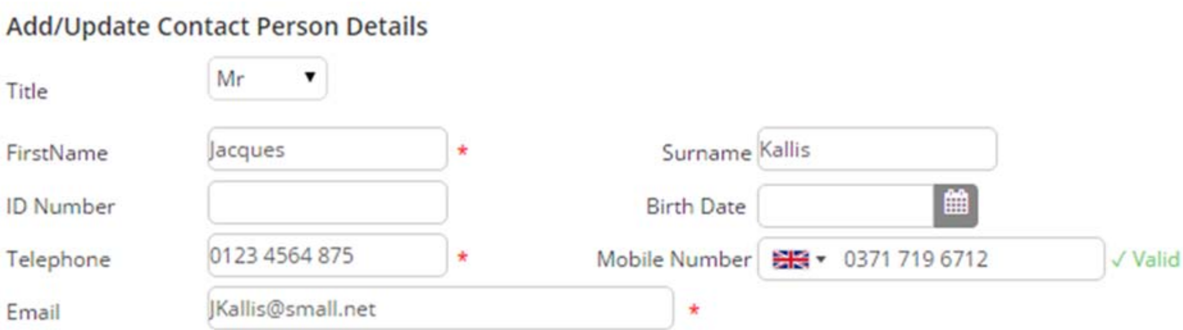
Opening the associated email displays the rich text formatted email directly inside the Service Request window.



Please note that this will only apply to emails received by Pulse after being upgraded to version 15.11 or greater.

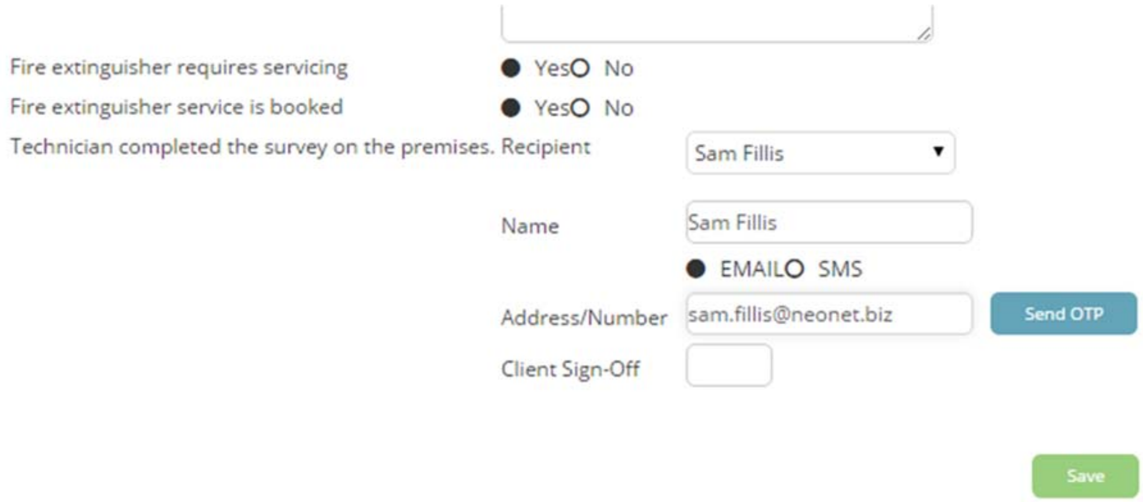
Various SMS notification improvements

We have done away with email-to-SMS support and replaced it with a more powerful API-based approach. This means that we can now record and display whether the SMS was successfully sent. We have improved the mobile number fields making it easier to capture phone numbers correctly, using a flag dropdown to designate the country code.



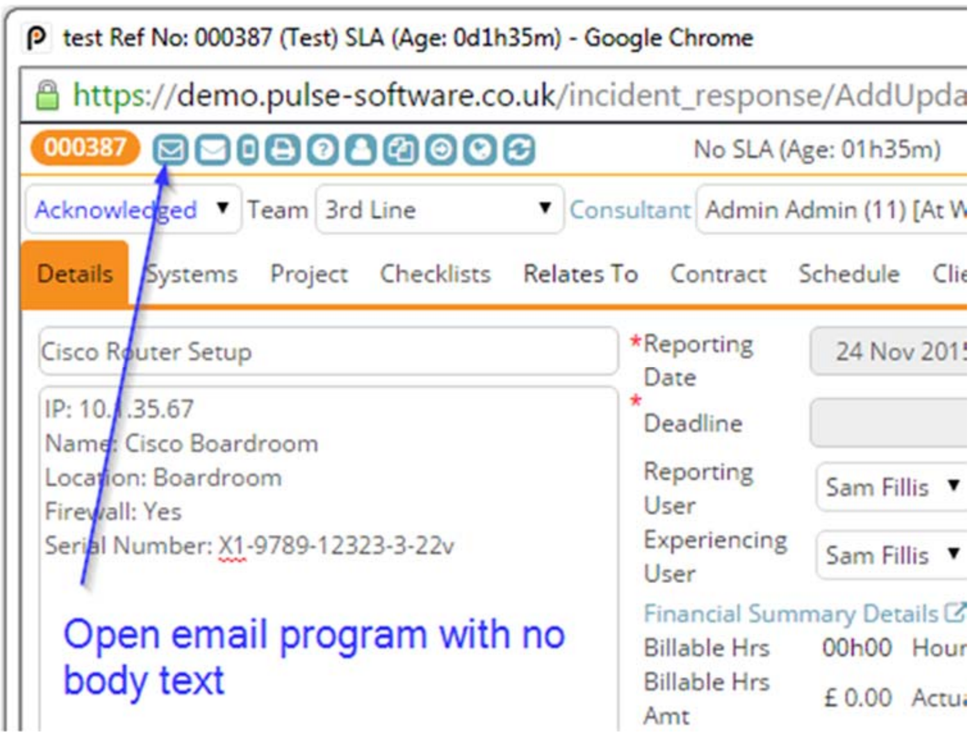
Client sign off/one-time pins available directly on surveys

Surveys can now directly incorporate the client sign off/one-time pin functionality. This makes it much easier to show the customer what they are signing off, and the fact that they have done so is included in the survey data. It is available as a new question type on incident-based surveys.



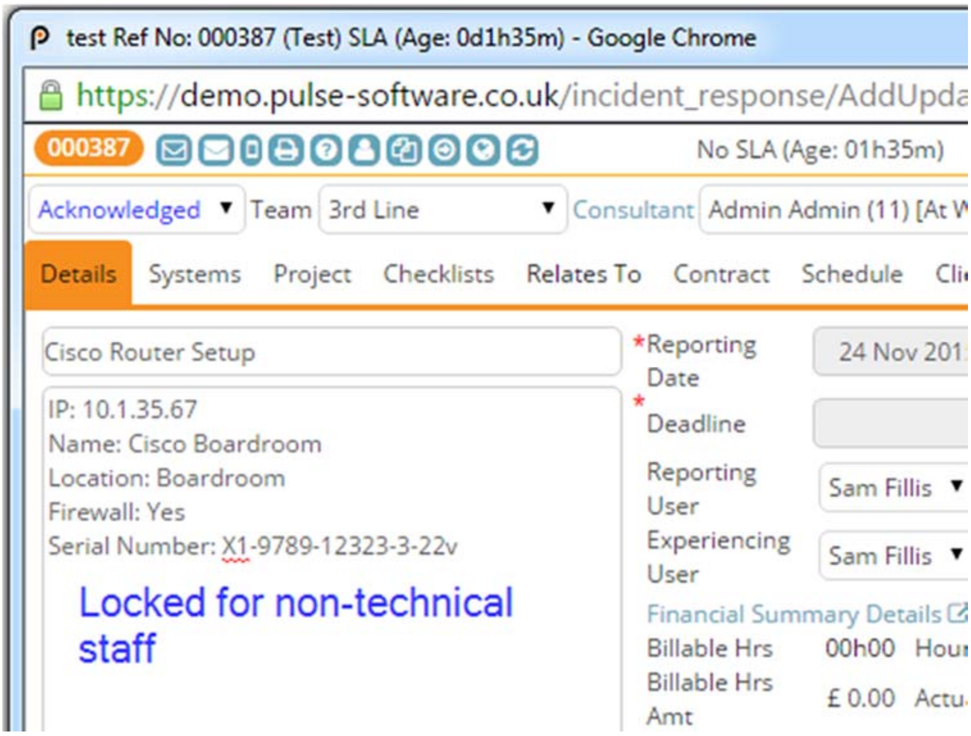
No default text in emails sent from your email program off the Service Request

It is now possible to not have default text in the body of an email sent from the Service Request when using your email program. Let us know if you would like to turn the default text off.



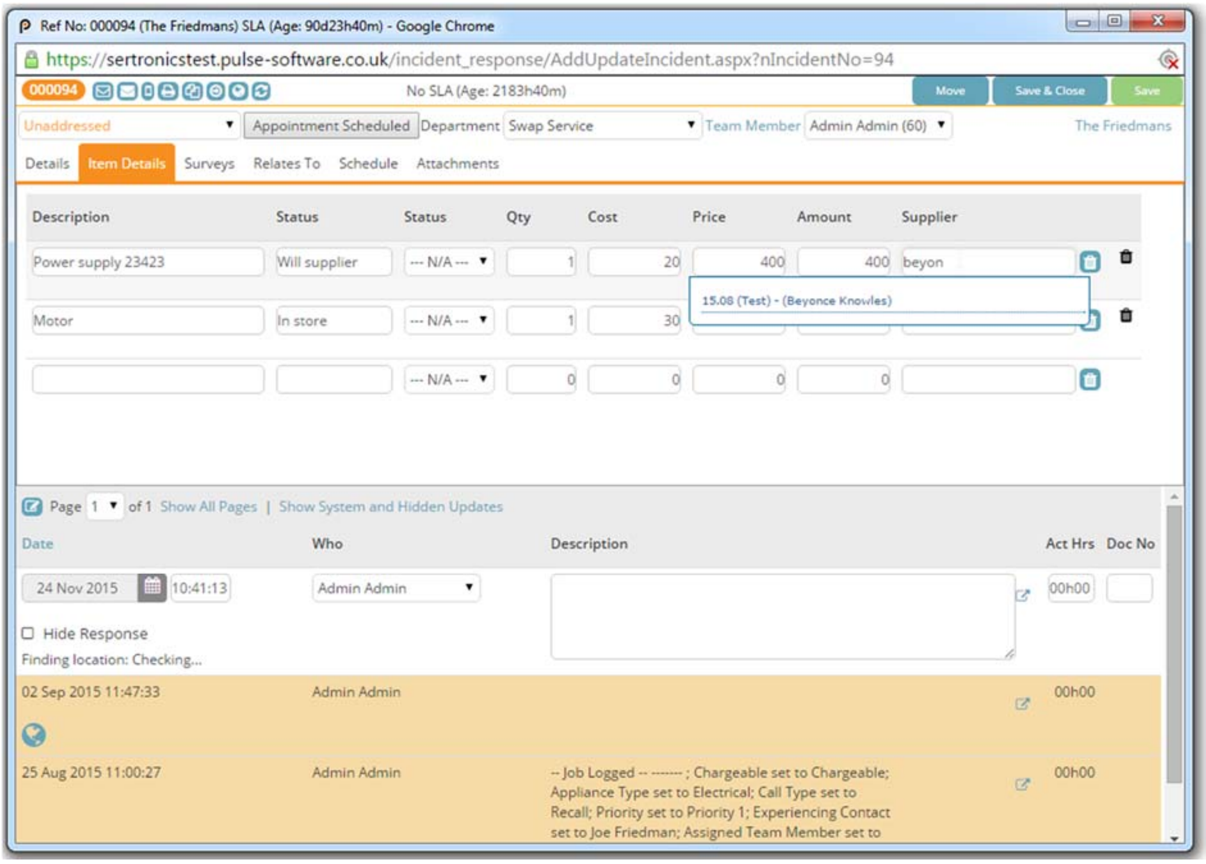
Prevent Service Request description editing

Do you include important information in the description of the Service Request only to find that it is edited and overwritten by a staff member? The ability to edit the description can now be controlled by clearance level. Let us know if you would like to implement this in your installation.



Miscellaneous Charges improvements

The Miscellaneous Charges tab on the Service Request has been enhanced to include centralised statuses and suppliers. It is also possible to customise much of the default text for your use.



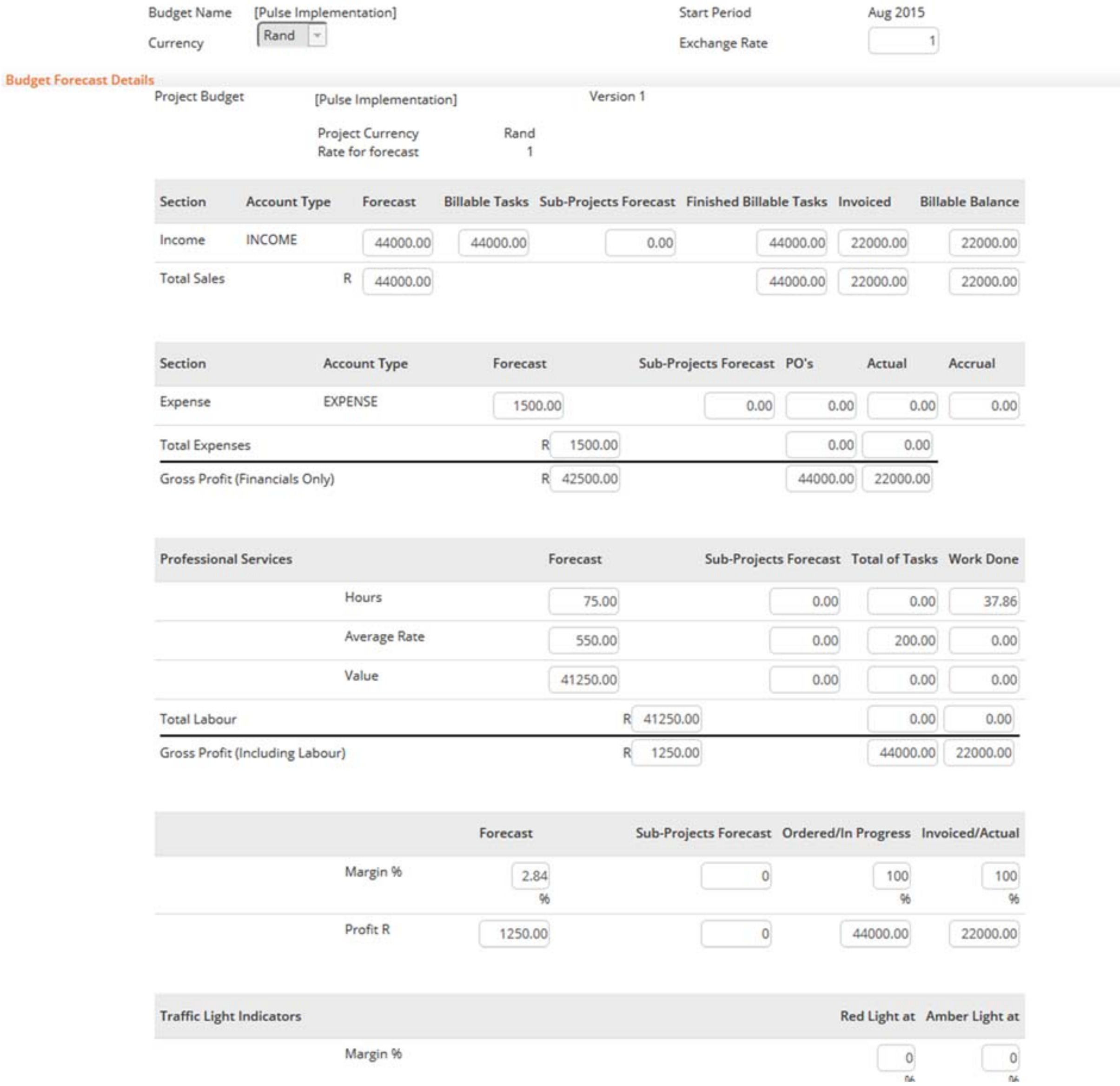
Bulk move of Contact People

Do you often need to move contact people from one client to another? The new spreadsheet import to facilitate this allows you to set whether the contact person should become the default at the client, and if so can be reset as the reporting and experiencing user at that client.

Projects

Project budgets now include linked Service Requests in their calculations

Service Requests linked to a Project after creation are now included in budget calculations for actual hours and count towards incurred manpower expenses.



Budget Name [Pulse Implementation] Start Period Aug 2015
Currency Rand Exchange Rate 1

Budget Forecast Details

Project Budget [Pulse Implementation] Version 1

Project Currency Rand
Rate for forecast 1

Section	Account Type	Forecast	Billable Tasks	Sub-Projects Forecast	Finished Billable Tasks	Invoiced	Billable Balance
Income	INCOME	44000.00	44000.00	0.00	44000.00	22000.00	22000.00
Total Sales	R	44000.00			44000.00	22000.00	22000.00

Section	Account Type	Forecast	Sub-Projects Forecast	PO's	Actual	Accrual
Expense	EXPENSE	1500.00	0.00	0.00	0.00	0.00
Total Expenses		R 1500.00		0.00	0.00	
Gross Profit (Financials Only)		R 42500.00		44000.00	22000.00	

Professional Services		Forecast	Sub-Projects Forecast	Total of Tasks	Work Done
	Hours	75.00	0.00	0.00	37.86
	Average Rate	550.00	0.00	200.00	0.00
	Value	41250.00	0.00	0.00	0.00
Total Labour		R 41250.00		0.00	0.00
Gross Profit (Including Labour)		R 1250.00		44000.00	22000.00

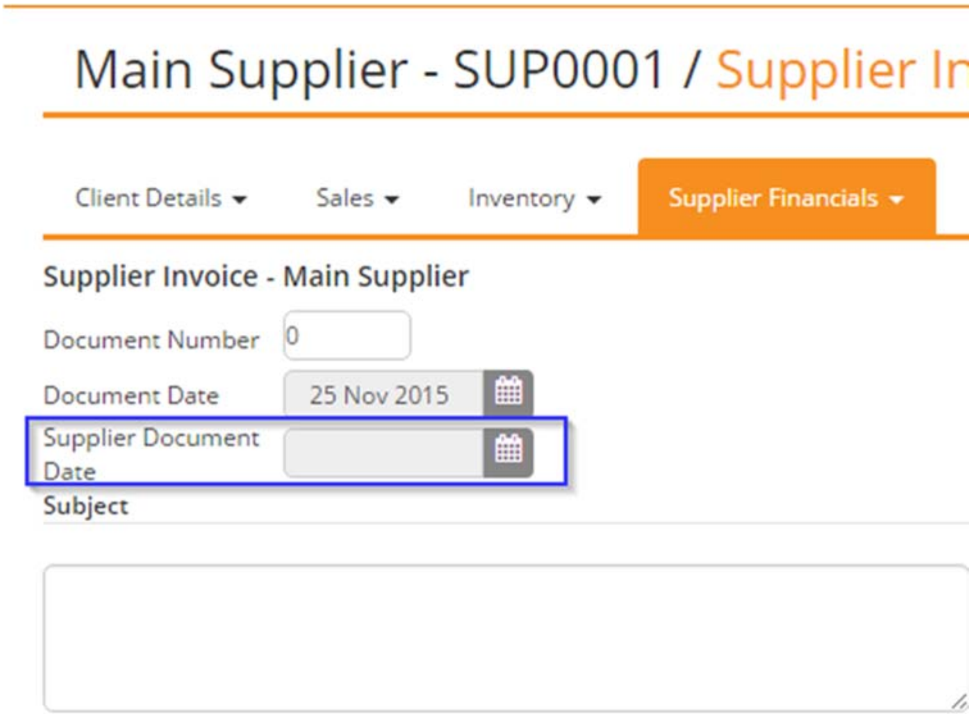
	Forecast	Sub-Projects Forecast	Ordered/In Progress	Invoiced/Actual
Margin %	2.84 %	0	100 %	100 %
Profit R	1250.00	0	44000.00	22000.00

Traffic Light Indicators	Red Light at	Amber Light at
Margin %	0 %	0 %

Financials

New Supplier Document Date field on Supplier Invoices and Credit Note

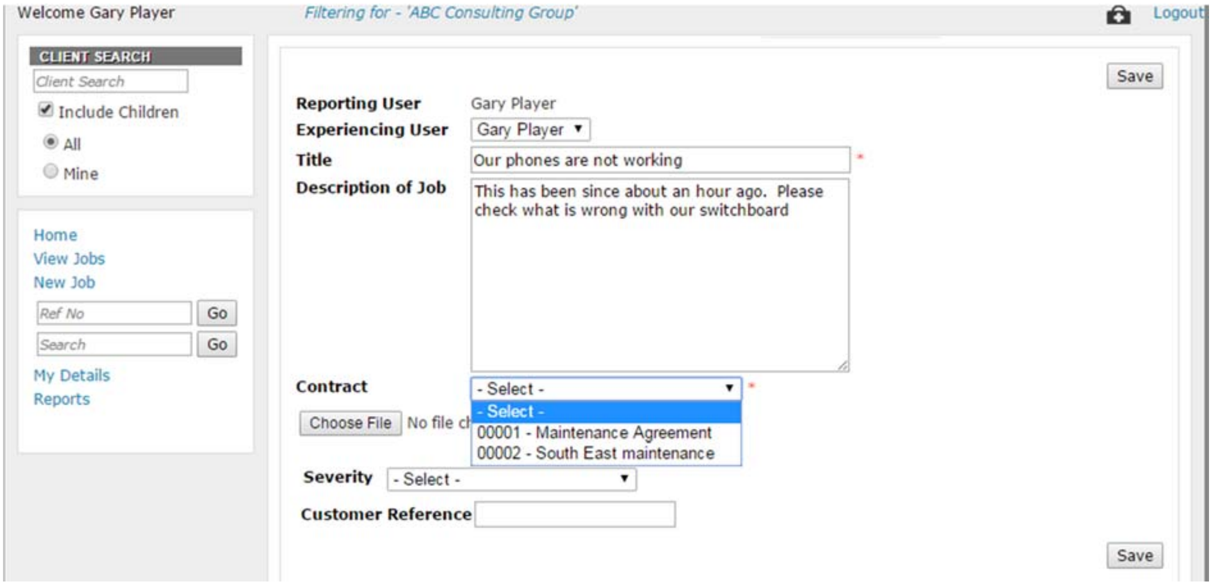
If you need to post a supplier invoice or credit note but the period of the document is closed, then you can indicate the date in a new field.



Client Portal

Allow contract selection by your customers when logging a Service Request

If you offer different services recorded as contracts in Pulse, these can be offered for selection in the Client Portal when logging a new Service Request. If the customer only has one such contract, it will be preselected. Please contact us if you would like to display contracts for selection to your customers.

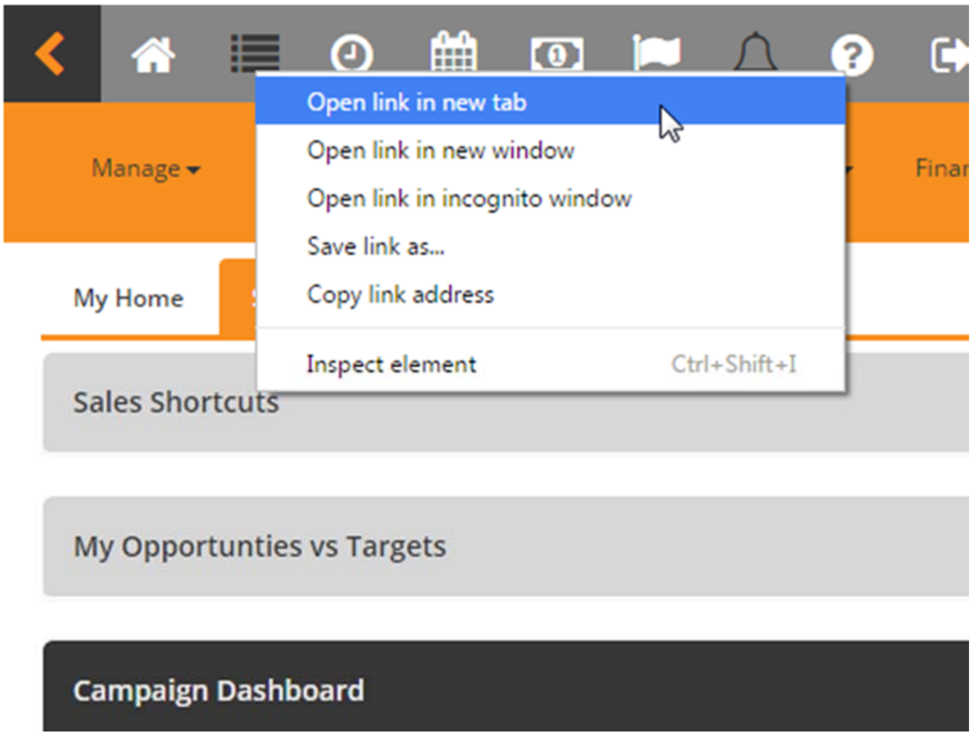


Core

Password expiry customisable, and can be turned off entirely
As the world changes so do security threats and our responses to them. With so many passwords needed for modern life, it is now safer to choose long complex passwords, meaning it is no longer necessary to change them as often.

Up to version 15.08, Pulse mandated password changes every 30 days. Please let us know if you would like this made longer (or shorter), or if you would like password expiry turned off completely.

Open menu items in a new tab
With the reskinning exercise we undertook earlier this year, it was no longer possible to right-click on menu items and icons to open them in a new tab. We have brought this back in 15.11.



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

We have also included more monitoring of your installation and tools that will help our staff deliver better service to you.