



Pulse Release Notes – 16.05

Watershed Items

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

Service

- ★ Mobile interface reskinned to match main application
- ★ Travel time added to appointments, with Travelling Now buttons on the mobile appointment interface
- ★ Client handwritten signature sign off now available on mobile interface
- ★ Ability to remove parent setting from a Service Request
- ★ New compact Quotation interface
- ★ Email that logged Service Requests available on lists
- ★ Client Service Requests lists now able to show Service Requests at client's children and further descendants

Inventory

- ★ Generate and print barcodes for serialised inventory items

Core

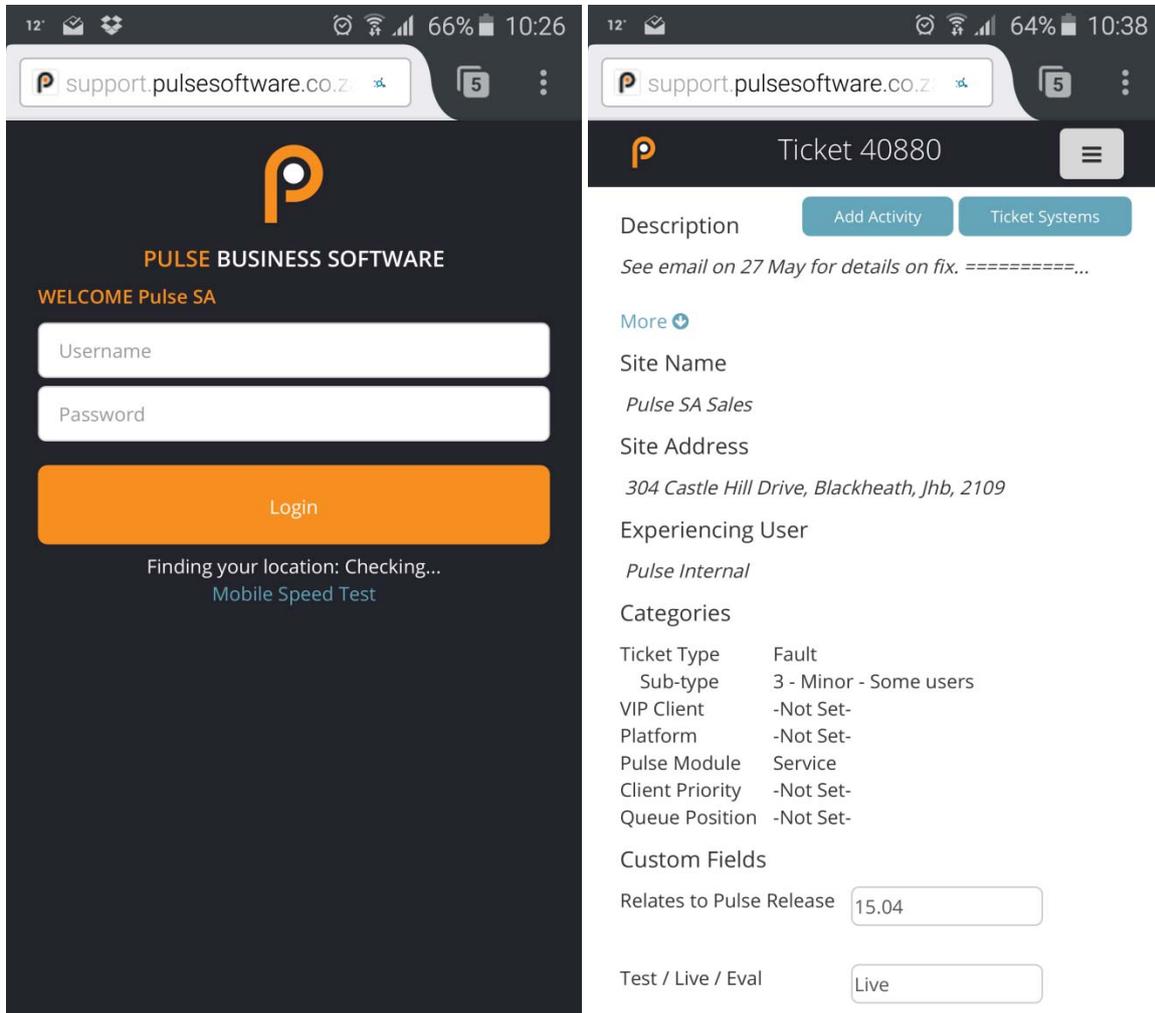
- ★ Collapsing menu bar to improve available vertical space

Service



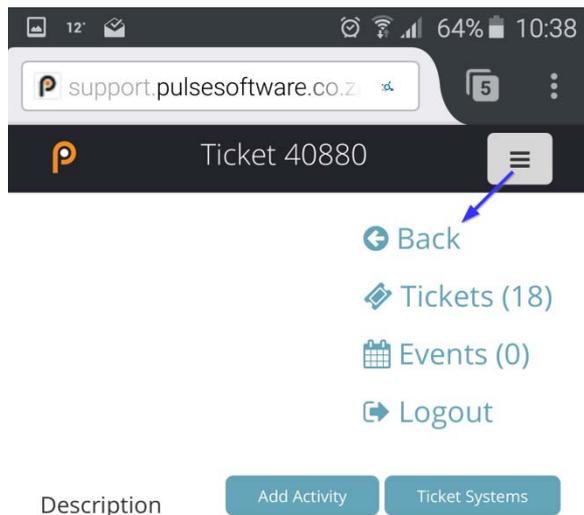
Mobile interface reskinned to match main application

Building on the success and positive feedback from the reskinning of the desktop application, we have applied the same skin to the mobile browser interface. The experience across mobile and desktop for service users is now more consistent and easier to use.



The design is responsive to fit any device, and will handle portrait and landscape layouts. Please note – some interfaces are easier to use in landscape mode, so flip your device to try it out.

Navigation is context aware and accessed through the navigation icon.



To try out the mobile site point your browser at [yourpulseurl]/mobile. We support all major mobile browsers on tablets and phones.



Travel time added to appointments, with Travelling Now buttons on the mobile appointment interface

Pulse appointments can make travel time appointments automatically, which appear in the mobile interface with the ability to mark them as “Start Travel Now” and “End Travel Now”. Contact us if you are interested in using travel appointments so that we can set them up for you.

Your Pulse Events							
Client	Event Name	Event Offering	Start	End	Status	Actions	
Britehouse SSD (Pty) Ltd 2021 16.01	(Auto-generated event name) Ref: 49619	Travel	09 May 07:49 Start Travel Now 09 May 09:08	09 May 08:49 End Travel Now 10 May 12:13	Confirmed	Add Activity	
Britehouse SSD (Pty) Ltd 2021 16.01	(Auto-generated event name) Ref: 49619	Travel	09 May 08:40	09 May 09:40	Confirmed	Start Travel Now Start Travel Details Add Activity	
Britehouse SSD (Pty) Ltd 2021 16.01	Ticket appointment (Ref No: 49619) Ref: 49619	Customer Meeting at Customer	09 May 08:49	09 May 09:49	Confirmed	On-Site Now On-Site Detail Add Activity	
Britehouse SSD (Pty) Ltd 2021 16.01	Ticket appointment (Ref No: 49619) Ref: 49619	Customer Meeting at Customer	09 May 09:40	09 May 10:40	Confirmed	On-Site Now On-Site Detail Add Activity	

Finding your location: OK



Client handwritten signature sign off now available on mobile interface

It is often important for technicians on the road to receive confirmation that the work is complete before they are allowed to leave the site. We are very excited to announce that handwritten signatures can now be captured on any touchscreen device running the mobile site in any browser. One-time pin emails and SMSs are still supported, and all sign offs are available on the Service Request and verifiable.

The work is complete

Act Hrs	0	Bill Hrs	0		
Tvl From	0	Tvl to	0	Tvl Km	0

Client Sign-Off Details

Contact Person

Keith Norris ▼

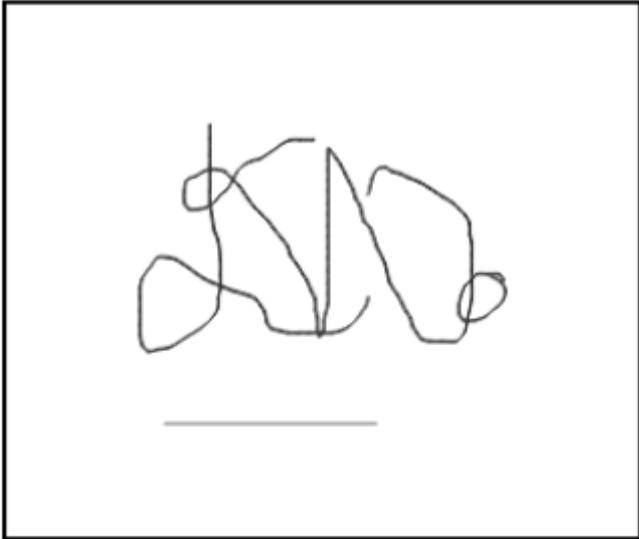
Keith Norris

Medium

One Time PIN Email

One Time PIN SMS

Signature



Clear Signature

Save Client Sign-Off Signature

Pulse Software



Ability to remove parent setting from a Service Request

When you have multiple clients affected by a single event, such as a server going offline, a parent Service Request against the server can control updates of all child Service Requests. In this way, work done on the parent filters to the children to keep your call centre and customers up to date on progress. New functionality now makes it possible to unset the parent setting in case it was set in error.

The screenshot shows a service request interface. At the top, there is a status bar with the number 49679 and a SLA indicator: 'Stopped In SLA [Time to First Responded]Target: 21 Apr 2016 10:30 AM (Pulse General SLA)'. Below this, there are dropdown menus for 'Awaiting Testing', 'Team: Pulse Staff', and 'Consultant: Support Tech (42)'. A navigation bar includes tabs for 'Details', 'Client Notes', 'Systems', 'Project', 'Surveys', 'Relates To', 'Contract', 'Schedule', 'Parent Child' (which is highlighted), 'Client Sign-Off', and 'Attachmer'. Under the 'Parent Child' tab, there are two buttons: 'Make Child Incident from Parent' and 'Make this Ticket not a parent' (which is highlighted with a blue border). Below the buttons is a 'Child Tickets List' section with a table header: 'Client Ref No Reporting Date Reporting User Experiencing User Title Last Response Firebar'.



New compact Quotation interface

Financial documents carry a lot of information. This can include a subject, a variety of dates, workflow, delivery details and more. At the end of the day, however, the most important section is the line items, which tend to be found at the bottom of the document. In version 16.05 we have redesigned the quote to reflect the importance of the line items – they are always visible, but the extra information can be collapsed so that the line items are central to your view.

The screenshot shows a compact quotation interface. At the top, there is a navigation bar with icons for home, list, refresh, calendar, camera, flag, bell, question mark, and share. Below this, there is a search bar with the text 'TEST CLIENT. Bucket for tij.co.za business' and a 'Ref Nos (comma-sep)' field. A secondary navigation bar includes 'Manage', 'Sales', 'Service', 'Scheduling', 'Inventory', 'Projects', 'Financials', 'Tools', 'Reports', and 'Help'. The main content area is titled 'TEST CLIENT. Bucket for tij.co.za business unit - TEST01 / Quotes (Service / Quotes)'. Below the title, there are tabs for 'Client Details', 'Sales', 'Service' (which is highlighted), 'Projects', 'Inventory', and 'Client Financials'. There are input fields for 'Number: 532', 'Delivery Date', and 'Document date: 06 Apr 2016'. A text area contains the word 'test'. Below the text area, there is a 'Lines' section with a table of line items. The table has columns: Line, Catalogue Item, Item Name, Description, VAT Type, Qty, Cost Price, Price, Disc %, Frequency, Amount, VAT Amount, and Total. The table contains four rows of data, each representing a line item for 'Consulting' services.

Line	Catalogue Item	Item Name	Description	VAT Type	Qty	Cost Price	Price	Disc %	Frequency	Amount	VAT Amount	Total
1	Consulting	Consulting	Consultation, Report Writing,	14 %	1	0.00	550.00	0	Once Off	550.00	77.00	627.00
2	Consulting	Consulting	Consultation, Report Writing,	14 %	1	0.00	550.00	0	Once Off	550.00	77.00	627.00
3	Consulting	Consulting	Consultation, Report Writing,	14 %	1	0.00	550.00	0	Once Off	550.00	77.00	627.00
4	Consulting	Consulting	Consultation, Report Writing,	14 %	1	0.00	550.00	0	Once Off	550.00	77.00	627.00



Service Requests logged by Email available on lists

One of the most popular features we have introduced recently was the ability to view emails on the main Service Request interface. Building on this, we have made them available on the lists of Service Requests you find in Pulse.

The screenshot displays the Pulse software interface. At the top, there is a navigation bar with icons for home, list, clock, calendar, mail, flag, bell, help, and refresh. Below this is a search bar for 'Client Search' and a filter for 'Ref Nos (comma-sep)'. A secondary navigation bar includes 'Manage', 'Sales', 'Service', 'Scheduling', 'Inventory', 'Projects', 'Financials', 'Tools', 'Reports', and 'Help'. The main content area shows a list of tickets. The first ticket is selected, and an email preview window is open over it. A blue arrow points from the 'Description' column of the ticket to the email preview window.

FireBar	Ref No	Reporting Date	Client	Title	Description	Assigned Consultant	Last Activity
No SLA (Age: 00h00m)	49960	10 May 2016 13:51:21	Pulse SA Sales	Pulse SA Release notes	Subject: Pulse SA Release notes From: keithn@pulse-software.co.uk Hi	Triage Queue	Subject: Pulse SA Release notes From: keithn@pulse-software.co.uk Hi Please remember to make the release notes for the 16.05 release. There are

10/05/2016 13:51:20 File created by Pulse from email.
From: Keith Norris
To: "support@pulse-software.co.uk";
Subject: Pulse SA Release notes
Hi

Please remember to make the release notes for the 16.05 release. There are some new items that our clients will really find useful.

support.pulsesoftware.co.uk

PULSE BUSINESS SOFTWARE
WELCOME Pulse SA
Username
Password
Login



Client Service Requests lists now able to show Service Requests at client's children and further descendants

When viewing Service Requests on a client, it is often useful to view those at child clients. A single click now makes this possible.

Seneca Optimus - / Job (Service / Job)

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

19 Jobs Page 1 of 2 Show Non-Paged | Open ▾ [Show child Client Jobs](#)

FireBar	Ref No	Reporting Date	Title	Description	Assigned Consultant	Status	Customer Invoice
Stopped Overdue [Time to Update]Target: 3 May 2016 15:16 PM (General SLA)	000392	03 May 2016 14:45:26	yututh	ghrgrhgt	Admin Admin	Acknowledged	
Overdue [Time to Update]Deadline: 30 Sep 2015 9:15 AM	000383	29 Sep 2015 15:14:18	Site Survey	Notes: Do the site survey to determine whether the installation can proceed	Finn MacDonald	Acknowledged	
Stopped Overdue [Time to Update]Target: 24 Aug 2015 11:34 AM (General SLA)	000381	24 Aug 2015 11:04:21	Internet down	No internet.	Admin Admin	New	
Stopped Overdue [Time to Update]Target: 22 May 2015 12:00 PM (General SLA)	000368	22 May 2015 11:29:05	No connection on WiFi	When it is on WiFi, it doesnt connect.	Admin Admin	Acknowledged	
Stopped Overdue [Time to Update]Target: 26 Mar 2015 12:06 PM (General SLA)	000365	26 Mar 2015 11:32:41	Date format on all reports is US	Please change my date format to UK	Admin Admin	New	

Link to the Response from the Appointment on the mobile interface

It is now possible to get to the Response adding interface directly from the Appointment.

Replace labels for mobile appointments

Mobile appointment buttons, such as "Left Site" can have alternative text if required. Contact us for more information if this is useful to you.

Financials

Attachments on Debtors Invoices

Debtors Invoices join the growing list of documents that can have attachments.

Inventory



Generate and Print Barcodes for Serialised Inventory Items

Pulse Inventory has received a major update with the introduction of internal barcodes. Your warehouse can now receive, process, move and pick stock, all the while using barcodes generated internally. Cost-effective barcode scanners can be used to record all stock, as well as its location.

Barcodes can be printed to put onto stock items, and can be included on any documents printed, such as picking slips, invoices, etc.

Gentry Traders - SC 1671 / System (Inventory / System)

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

HW-CISCO877-K9

System Details System Contracts Options Settings Descriptors Configurations Jobs History Checklists Attachments

Update System Details

Save

Delete

Catalogue Item Sample Product/Service 127



Active

Hidden

System Name *

System Description

Make

Type

SLA Class

Series Name

Model Number

Serial Number *

Attachments on Systems

Systems are added to the growing list of items that support attachments.

Sales

Changing the delivery date on an Opportunity linked Quote prompts an update on the Service Active Date

Pulse's powerful Opportunity – Quote interlinkage means that you do not have to capture details twice during the sales and scoping process. This has received a boost as the delivery date on the Quote is linked to the Expected Job Active Date on the Opportunity, making your sales reporting more accurate than ever before.

The screenshot shows the Seneca Optimus interface for a quote. The top navigation bar includes 'Client Details', 'Sales', 'Service', 'Bookings', 'Projects', 'Inventory', and 'Client Financials'. The main form area has tabs for 'Lines', 'Workflow', 'Text', 'Financial', 'Relates To', 'Customer', 'Sender', 'Delivery Details', and 'Attachments'. The 'Relates To' tab is active, showing fields for Job, Booking, Template, Contract, Client PO, Opportunity, and Sales Order Project. A blue arrow points to the 'Delivery Date' field, which is currently set to '13 Jul 2016'. A dialog box is open, asking: 'You have changed the Delivery Date on this Quote. Do you want to update the linked Opportunity Expected Job Active Date to 13 Jul 2016?'. The dialog box has 'Yes' and 'No' buttons. Below the form is a table with columns: Line, Catalogue Item, Item Name, Description, VAT Type, Qty, Cost Price, Price, Disc %, Frequency, Amount, VAT Amount, and Total. The table contains one row with the following data: Line 1, Catalogue Item Cisco ASA 5550, Item Name Cisco ASA 5550, Description Cisco ASA Router For ADSL, VAT Type 20, Qty 1, Cost Price 0.00, Price 200.00, Disc % 0, Frequency Setup, Amount 200.00, VAT Amount 40.00, Total 240.00.

Improvements to changing the term on a Quote linked to an Opportunity

Further to the date interactions above, changing the term on the Quote gives more options for the corresponding field on the Opportunity.

Seneca Optimus - / Quotes (Sales / Quotes)

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

Number 64 Delivery Date 13 Jul 2016 Document date 30 May 2016

Integrated Datacentre Monitoring

Lines Workflow Text **Financial** Relates To Customer Sender Delivery Details Attachments

Markup % 0
Document Currency Pound Current Rate 1
Term In Months 24 (60 Months Max)

Line	Catalogue Item	Item Name	
1	Cisco ASA 5550	Cisco ASA 5550	
1.1	Surge Protector for Routers	Surge Protector for Routers	
1.2	Cisco Installation Job	Cisco Installation Job	
2			

Linked Opportunity currently has a term of 36 months.

1. If you would like to change the Opportunity term from 36 to 24, press **Yes**.
2. If you would like to unlink the Opportunity from this Quote, press **Unlink**.
3. To revert your term back to 36, press **Cancel**.

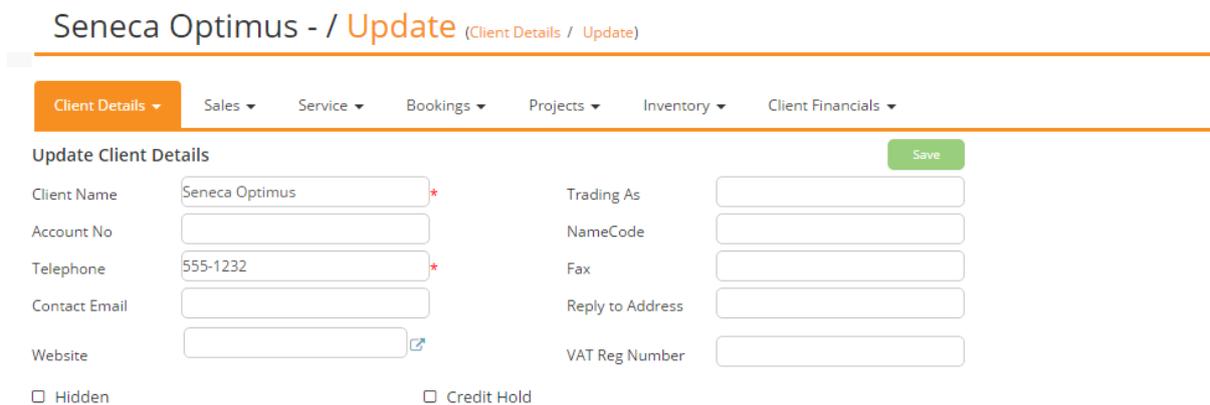
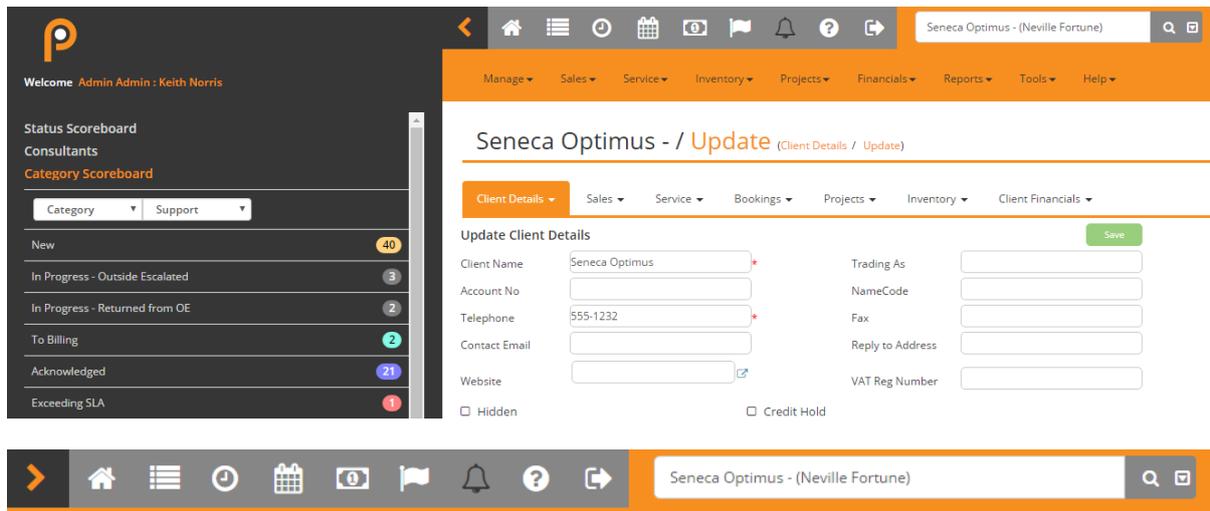
Yes Unlink Cancel

Core



Collapsing Menu Bar to Improve Available Vertical Space

Collapsing the left toolbar is a great way to get more space to work with, especially on documents such as quotes, which can have many columns on the line items. From version 16.05 you will also benefit from increased vertical space as the menu bar collapses along with the left toolbar. To get it back, simply reopen the left toolbar.



Hiding a Consultant Ensures that they are Not the Default

Consultants can be set as defaults for a variety of items in Pulse. When a staff member leaves, it can be difficult to ensure that hiding their consultant record does not leave you without a default. We have therefore built in an alert that will tell you what items need addressing before you can hide the consultant.

Link to the Client Portal from the Main Application Login Screen

Sometimes your customers will browse to [https://\[YourPulseSite\]](https://[YourPulseSite]) instead of [https://\[YourPulseSite\]/ClientPortal](https://[YourPulseSite]/ClientPortal). To help them find their way we have added a link to your Client Portal on the main login screen.

General Consistency Improvements

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