Pulse Release Notes – 17.02

Watershed Items

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

Service

- View more details and directly reply to emails attached to a Service Request
- Round-robin Service Request assignment
- Send all existing attachments with Outside-Escalation
- Tighter links between Service Requests and Appointments
- Selectively hide Categories on the mobile interface
- Signature sign-off on Surveys
- A new Service Request History and Analysis

Sales

- Send a test Campaign email before sending to the recipient list

Reports

- Pin DIY Reports to the Pulse menu

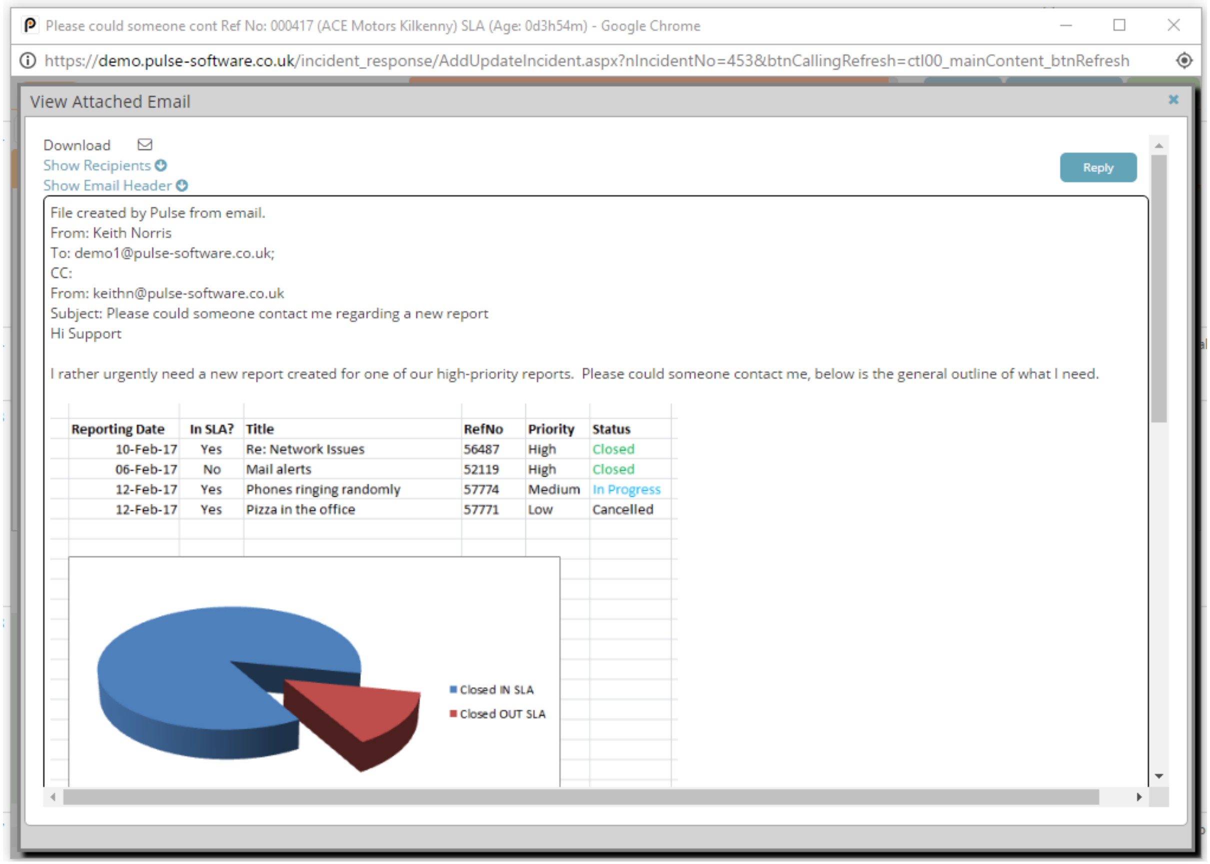
Core

- Usability improvement to the Add button on list interfaces
- Suggested for you
- Client information popup is now editable

Service

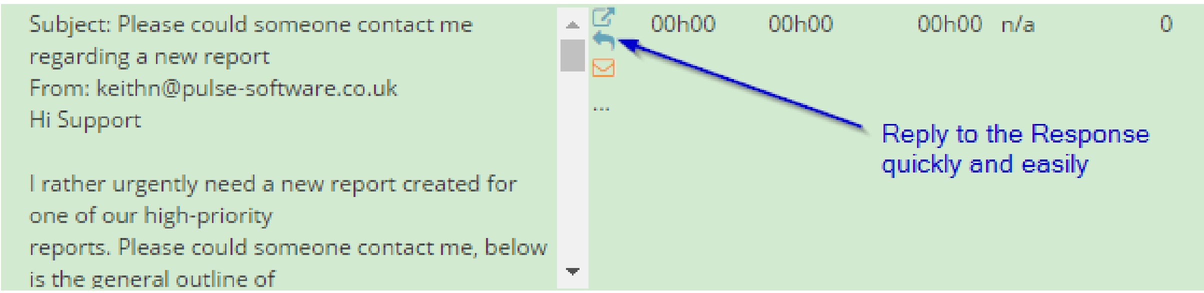
View more details and directly reply to emails attached to a Service Request
A service desk solution works best when all communication is available on the relevant Service Request. With this in mind we have added a number of enhancements to Service Request / Email interaction.

We now store all pertinent information regarding the attached email, including To, From and CC addresses, the Subject and (for the more technically-minded) the full email header. And it is now possible to reply to the email directly out of Pulse, wherever in Pulse you view it.



On the response grid you can hit *Reply* directly. You can edit the recipients if you wish, or simply send to the original collection of email addresses. The sent email will of course be saved on the Service Request, much as it is when sent from an email client with the reference number in the subject line.

Emails on the attachments tab can now also be opened inline, the same as in other areas of Pulse.



Round-robin Service Request assignment

If you have a busy service desk where incoming requests require a rapid response, then our round-robin assignment might be just what you need. New Service Requests are assigned to logged-in members of the round-robin group in rotation, and a dashboard gives a quick view of who is signed in and who will be assigned the next in-coming Service Request.

Round-Robin

Amy Walters

Bruce McCleod

Caty Tappin

Helen O'Reilly

Send all existing attachments with Outside-Escalation

Outside Escalation is a powerful method to pass work between Pulse installations. We have now introduced the ability to send existing attachments when generating the Outside Escalation request. In the past only subsequent attachments would be sent.

Please let us know if you would like to use this functionality, as it is disabled by default.

Tighter links between Service Requests and Appointments

Appointments linked to Service Requests are a great way to schedule a technician's day, but it is not always easy to tell quickly whether the technician has indeed started the work.

From version 17.02 it is possible to link the appointment status so that it changes the Service Request status. For example, clicking *On Site Now* on his mobile device can change the Service Request status to *In Progress*, which can then fire off notifications if required.

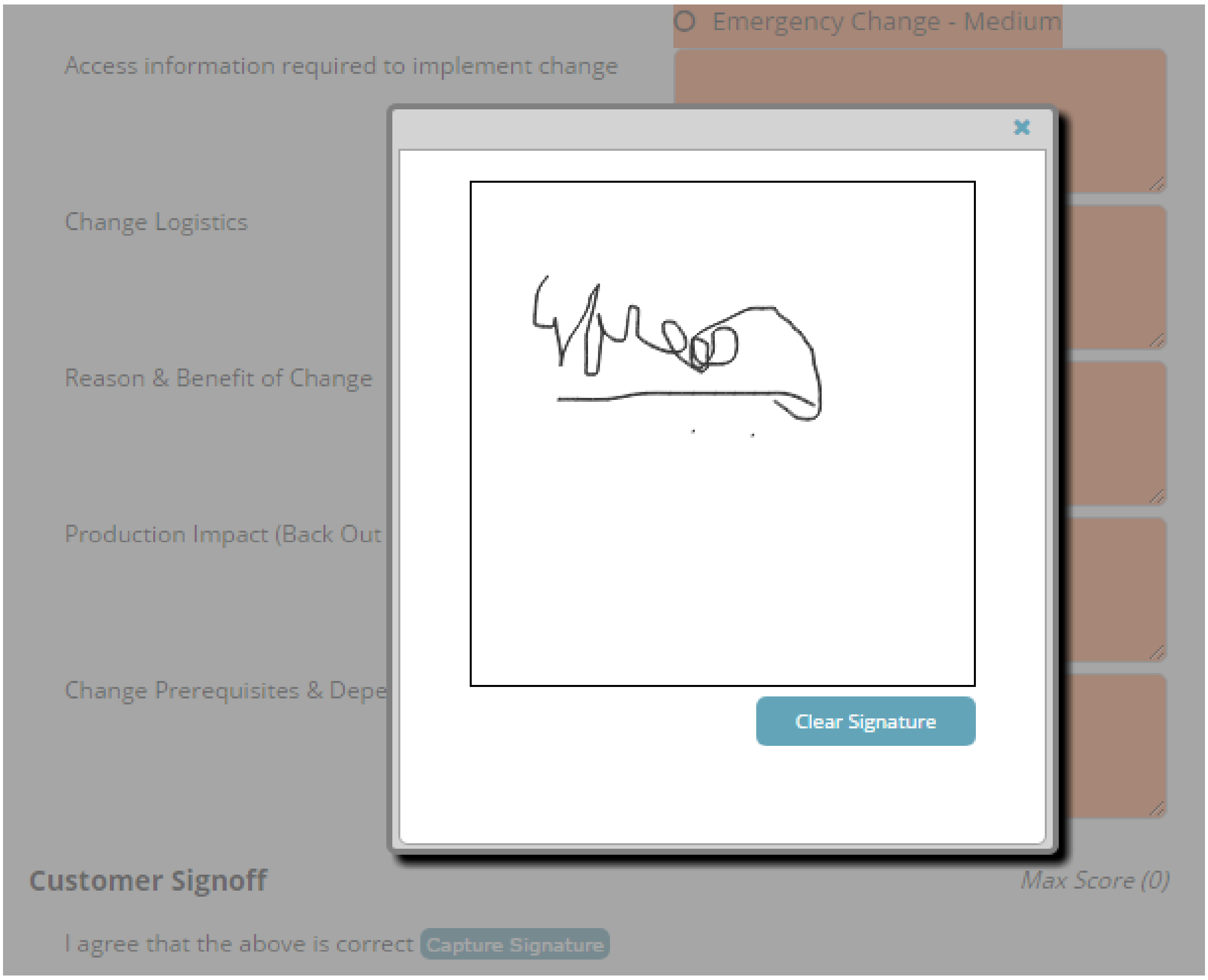
It is also now possible to automatically reassign the Service Request when reassigning the Appointment.

Selectively hide Categories on the mobile interface

It is not always necessary, or even appropriate, to have all categories available on the mobile interface. Limiting the drop downs available makes the interface easier to use. Items relating to, for example, billing, can safely be removed from the technician's view.

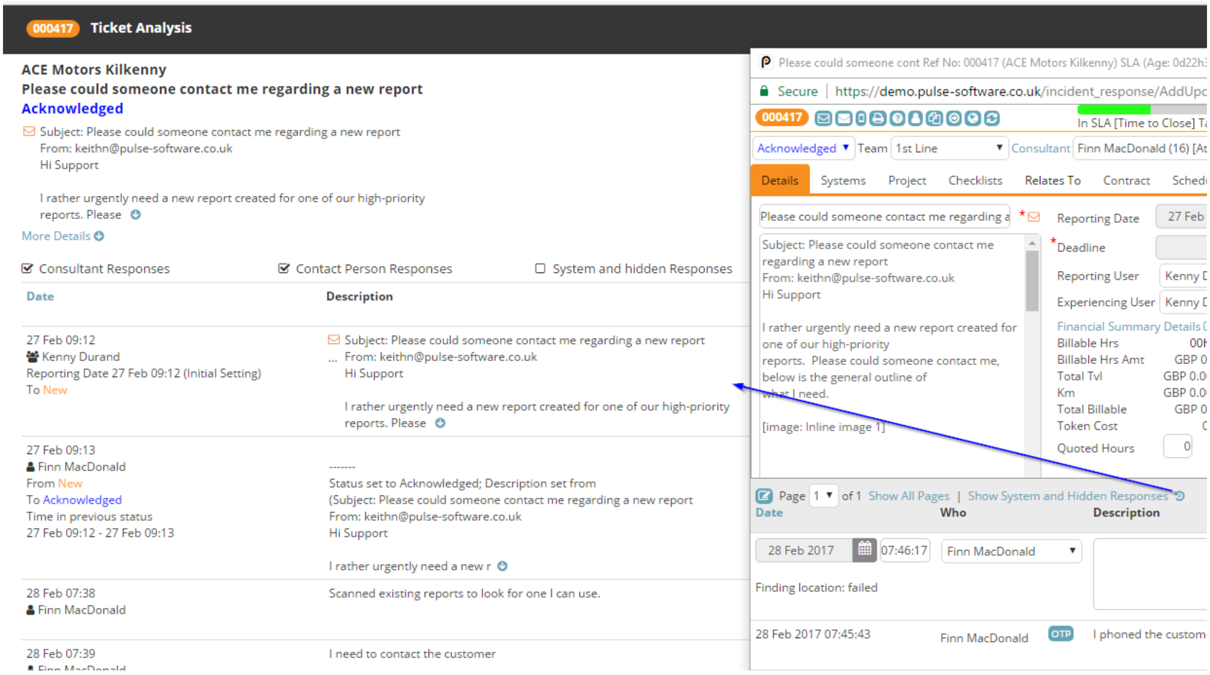
Signature sign-off on Surveys

Pulse Surveys are a great way to add checklists to a Service Request. We have now added the ability to require a signature on a touchscreen device before closing the Service Request. If you prefer, the One Time Pin option is still available.



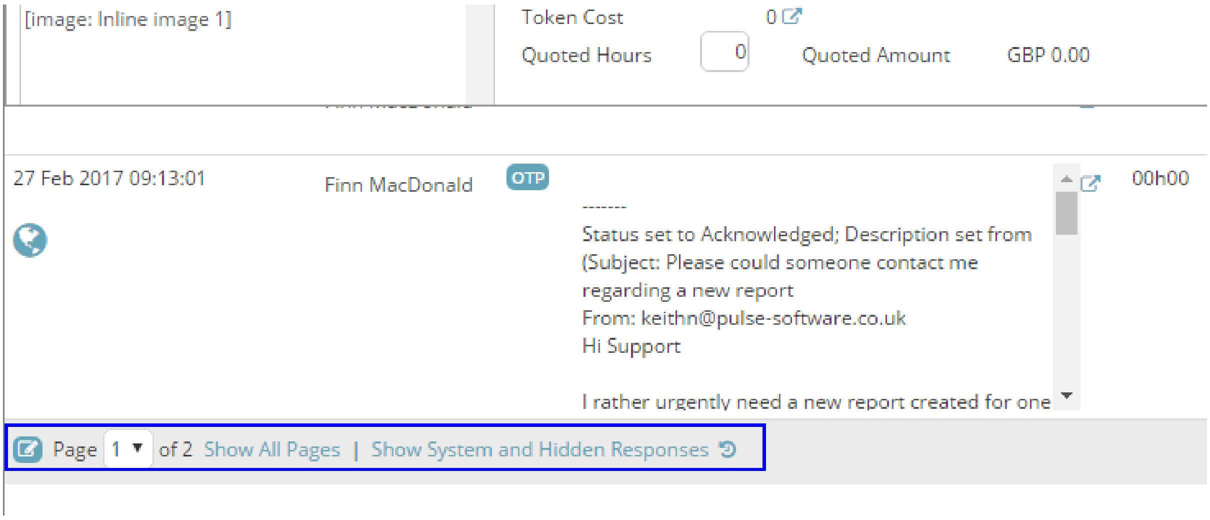
A new Service Request History and Analysis

Getting an overview of the activity on a Service Request is easy with the History and Analysis page. Simply click the icon at the top of the response grid, and filter the detail you want to see.



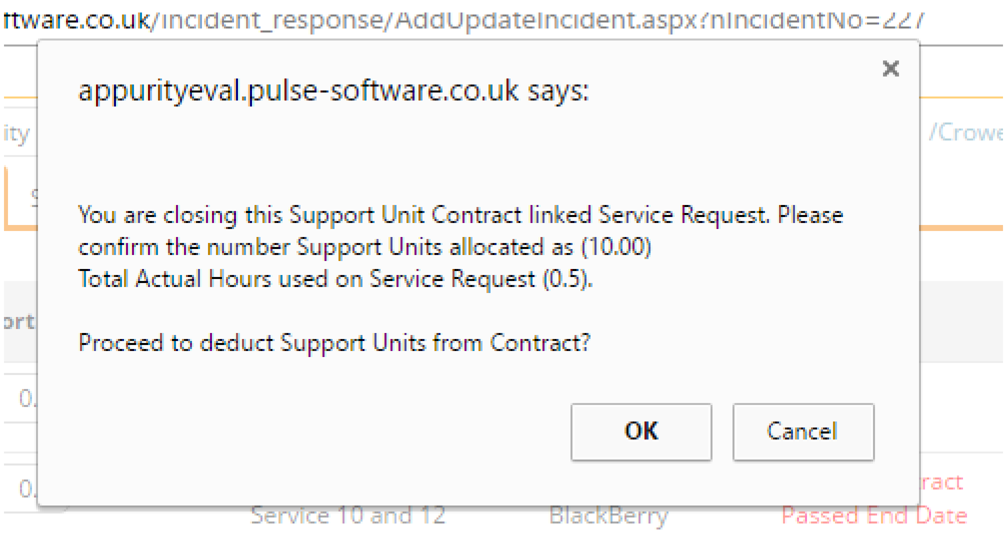
Paging in the footer of the Response grid

If there is more than one page of responses you will now see a copy of the grid header in the footer, to make it easier to get to the next page of responses.



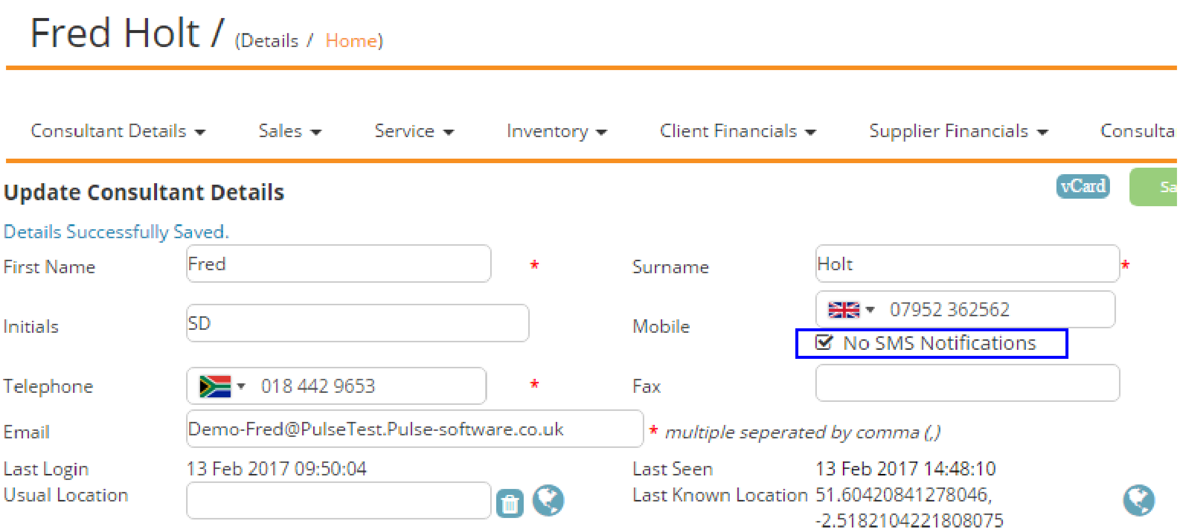
Hours spent on Token deduction interface

The confirmation dialogue for token deductions now includes the hours spent on the Service Request.



Prevent SMS notifications to a Consultant

Not all consultants want to receive Pulse notifications by SMS. A new flag on the Consultant record disables SMS notifications for that consultant only, and makes a response on the Service Request noting that it was not sent for this reason.

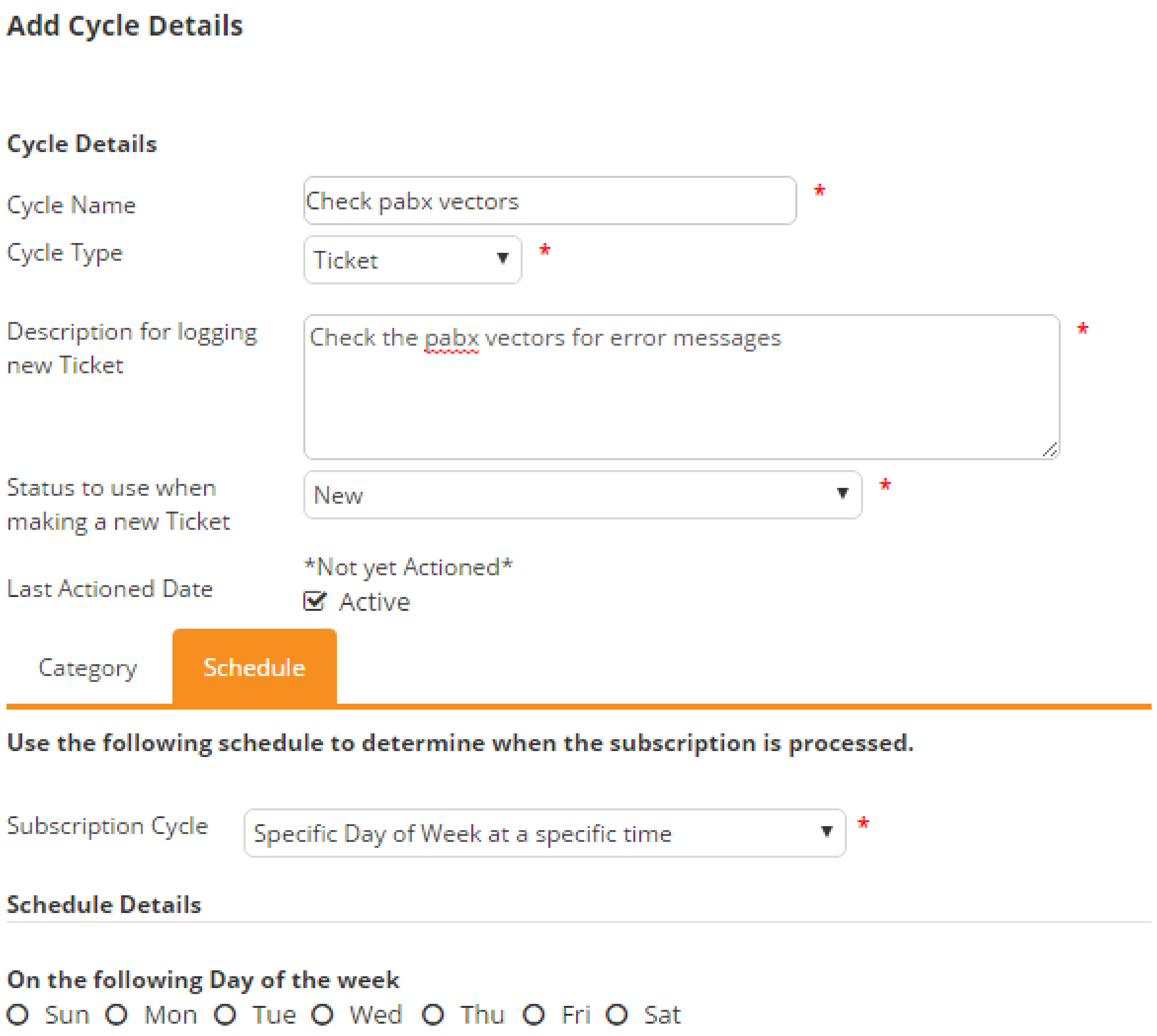


Cyclic Service Request enhancements

Cyclic Service requests are a great way to be reminded to do a job on a known cycle, and then record the time spent and findings on the Service Request.

We have enhanced the cycle engine so that the following cycles are now available:

- Daily at a specific time
- Specific day of week at a specific time
- Day of month at a specific time
- Last day of the month
- Every minute (to enable data-driven cycles)
- Annually at a specific time
- Every nth week on a specific day at a specific time



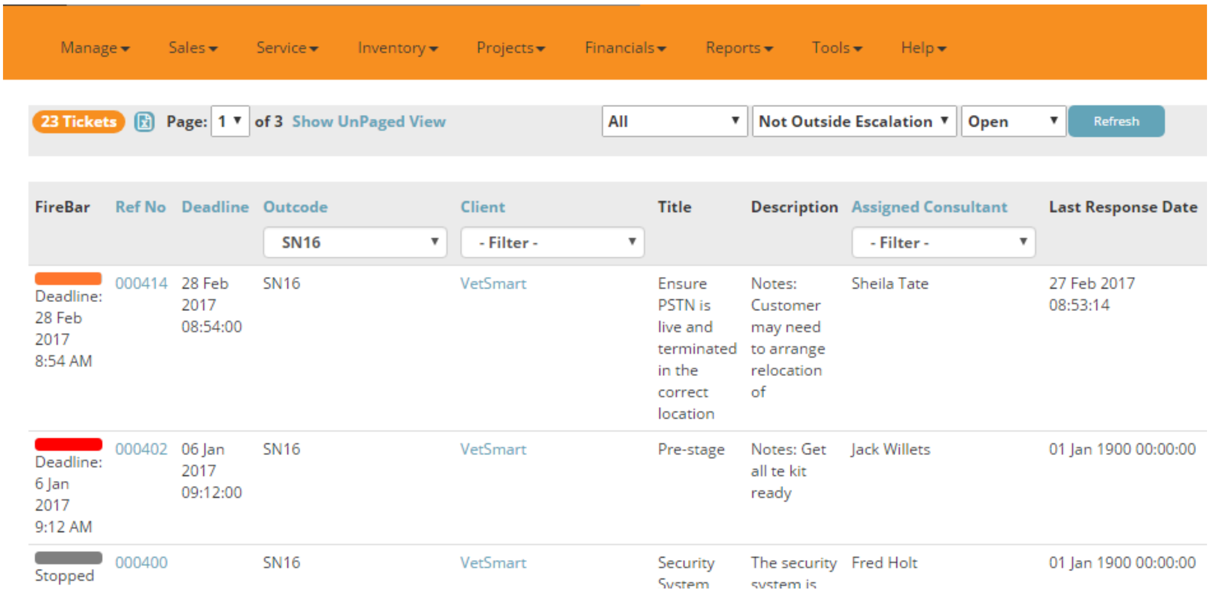
Default Catalogue Item on Quotes

If you would like to simplify your quote usage please let us know, and we will set it to use a default catalogue item in the background, such as "Consulting", allowing you to simply quote and move on.

UK outcode column on SRList

In the United Kingdom the postal code is an accurate descriptor of location. When scheduling work, the outcode (first four characters) is useful to get an overview of where the customer is located.

If you would like to add the outcode to your SRList you can do so, and it is also filterable.

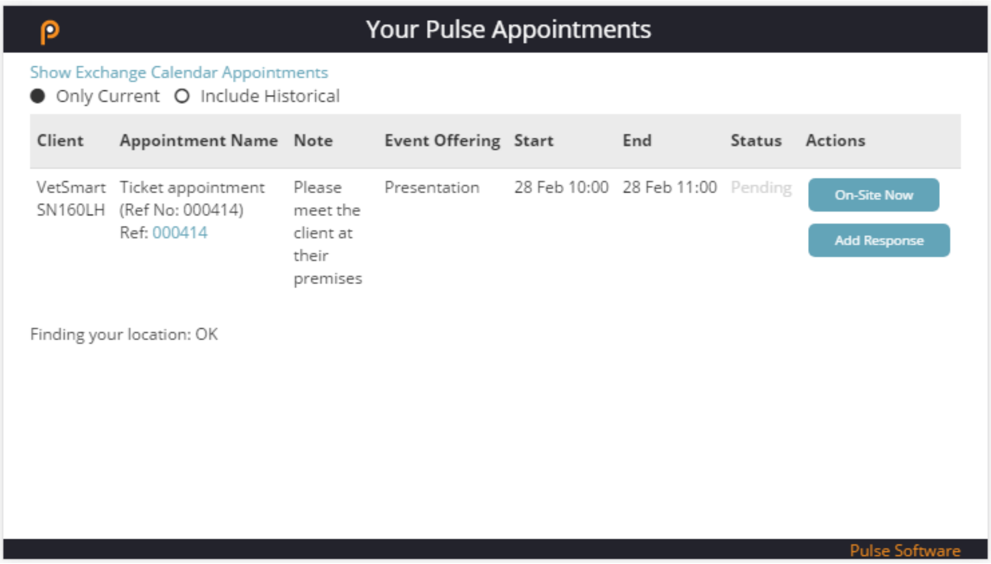


Search by post code on the Service Request Quick Add

The Service Request Quick Add now allows you to search on the post code, adding to the existing Parent Client, First Name and Telephone Number searches.

Small enhancements to Appointments on the mobile interface

The appointment time can now be set on the mobile interface, and the note can be seen directly on the list of Appointments.



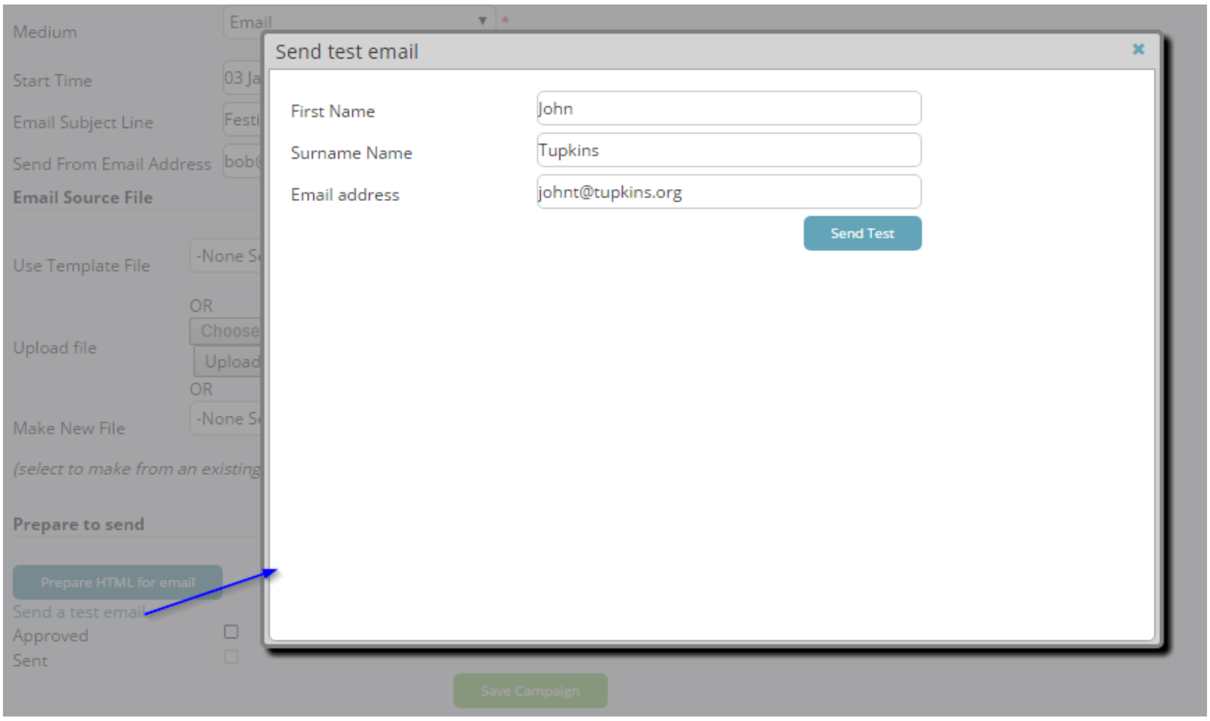
Save incoming emails as .eml attachments

By default Pulse stores email attachments as HTML files to view inline. If you would prefer them stored as .eml files that you can open with a mail client please let us know so that we can configure your Pulse to do so.

Sales

Send a test Campaign email before sending to the recipient list

You have written your campaign and are ready to send it, but want one last check to view it as the recipients would. You can now send it to yourself after preparing the HTML.



Please note that links cannot be processed in test campaign emails, as the engine that counts clicks only counts recipients in the recipient list.

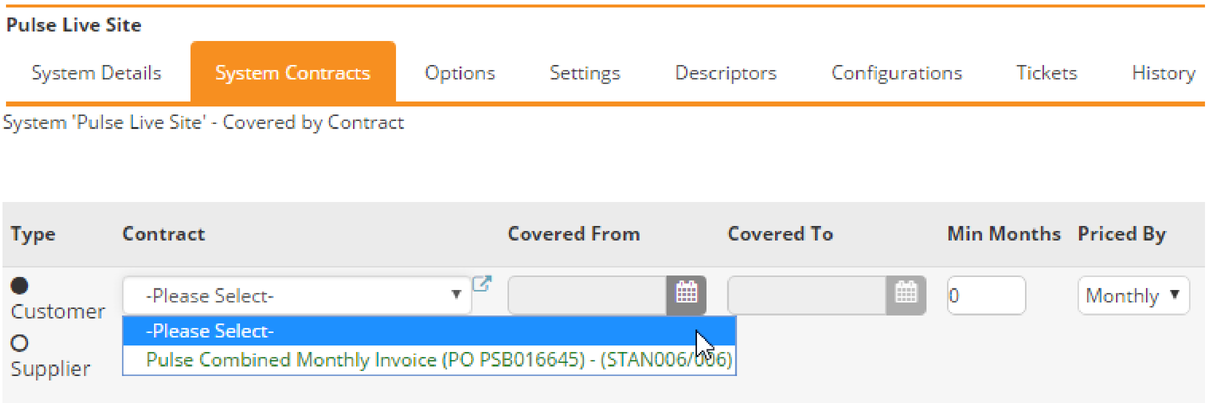
Inventory

Mandatory link to contract for system

Please let us know if you would like it to be mandatory to link a system to a contract when adding it.

Contract status visible on contract drop-down on System contracts

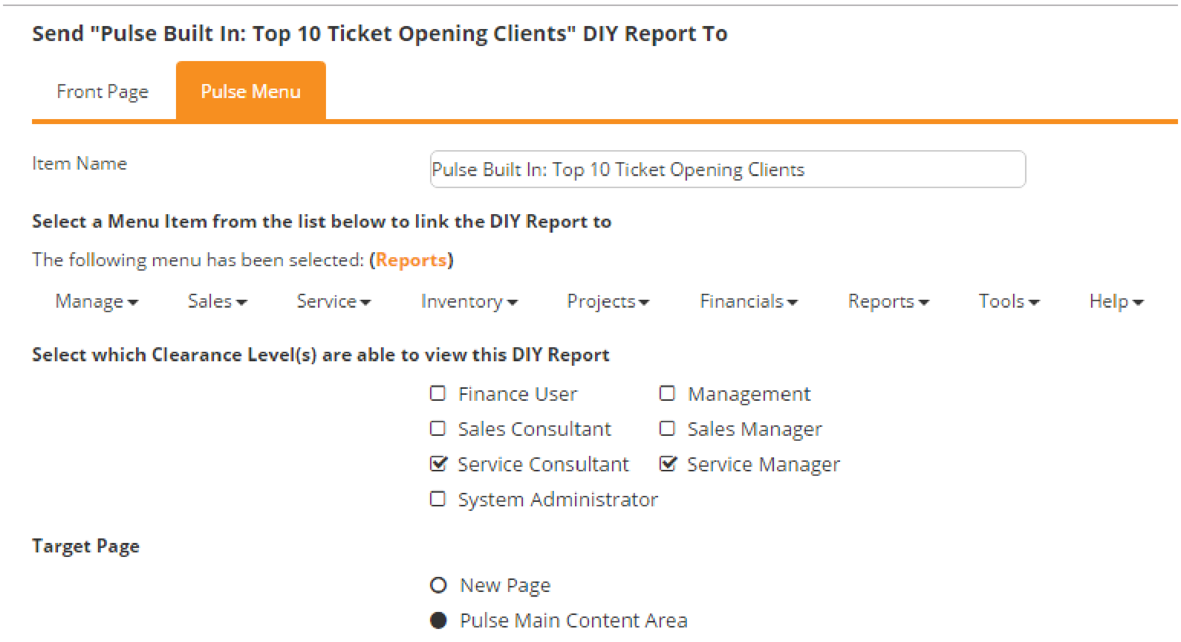
The contract status is indicated by the status colour when viewed on a system.

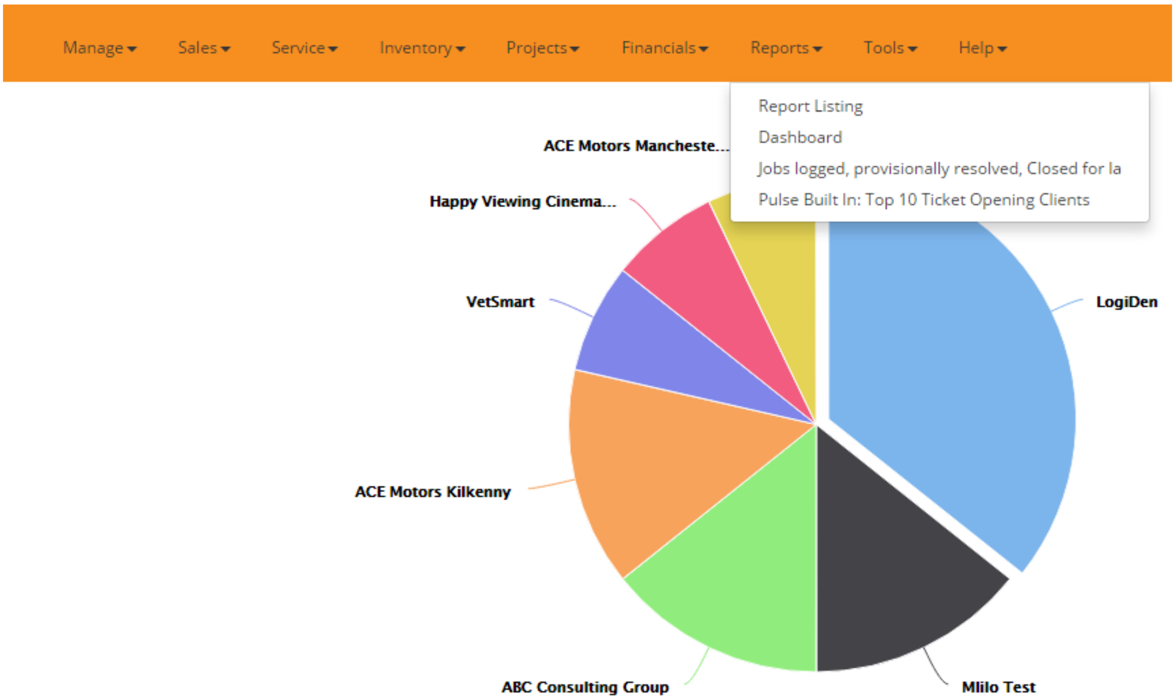


Reports

Pin DIY Reports to the Pulse menu

We continue to add functionality to our popular DIY reporting engine. Now, along with pinning them to your front page, you can pin them to the main menu in Pulse.

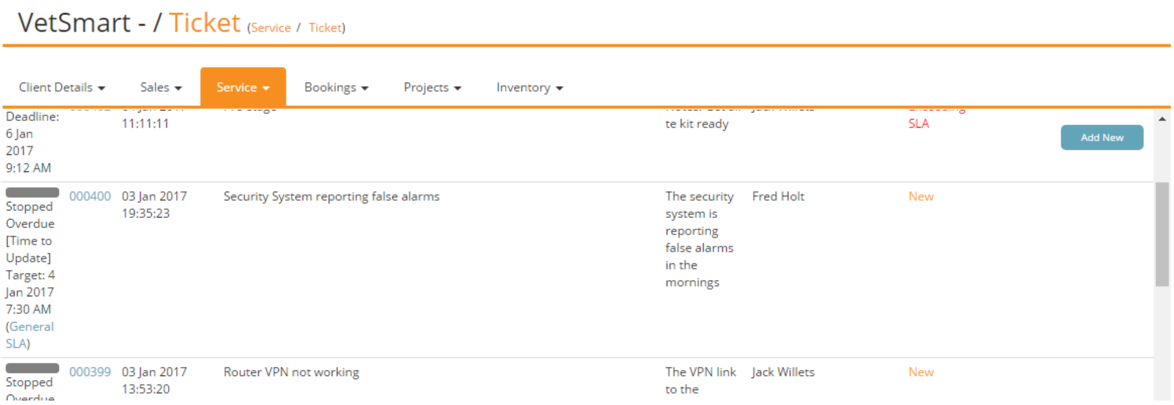




Core

Usability improvement to the Add button on list interfaces

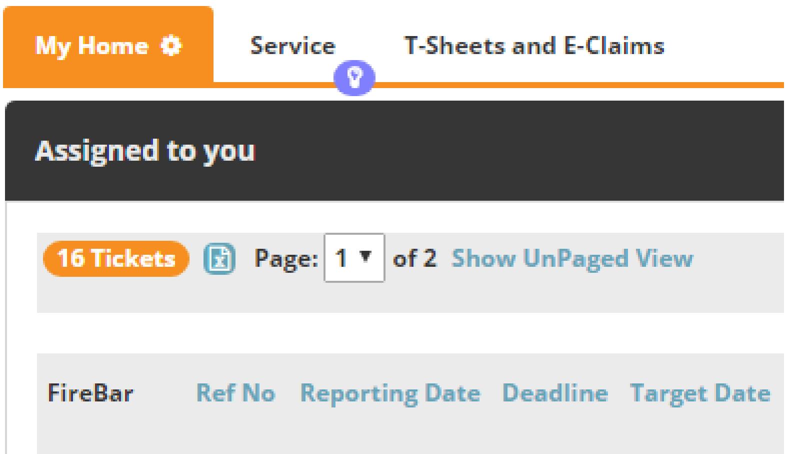
On most list interfaces, such as Service Requests at a client, we have replaced the top and bottom "Add" buttons with a single button that is always visible no matter where you scroll to.



Suggested for you

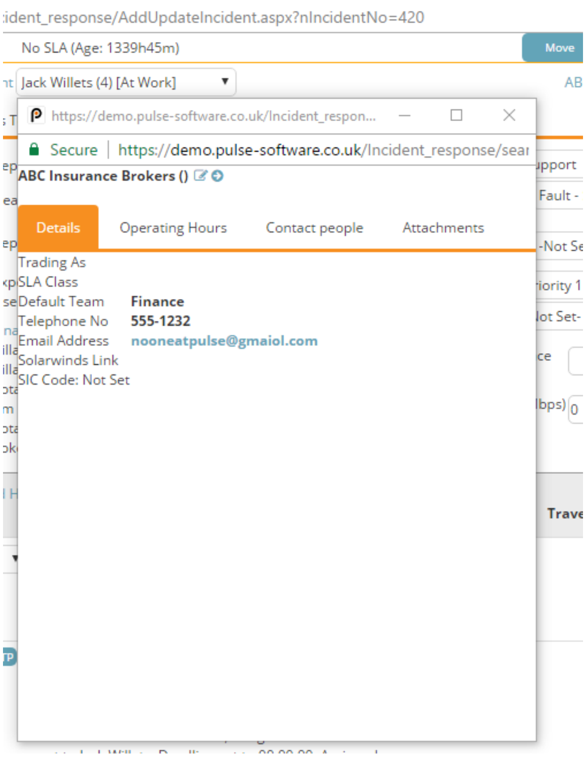
From time to time Pulse will identify front page items that may be of interest to you. These will be suggested by a light bulb icon on the section in question.

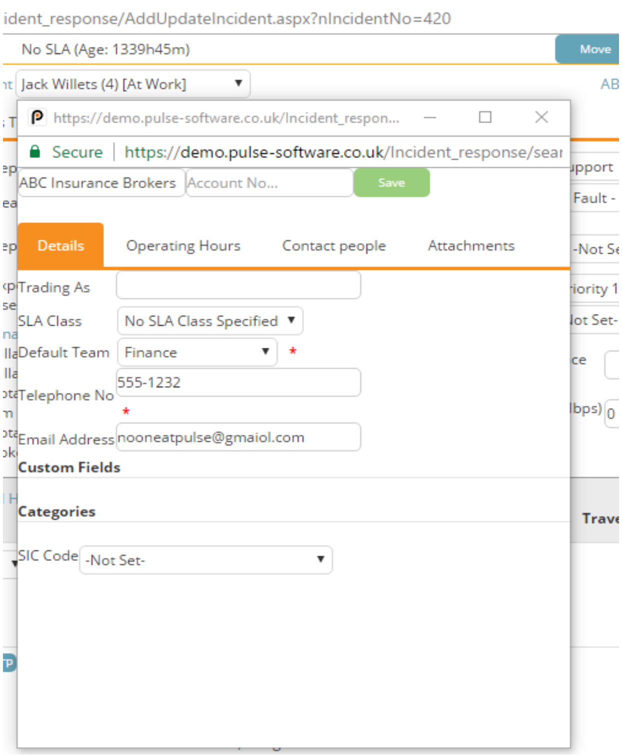
You will receive more information on how it works the first time you login to version 17.02.



Client information popup is now editable

A busy Service Desk needs to input data quickly and efficiently. It is now possible to edit client information directly from the popup that is generated from Service Requests and lists.





Client Longitude and Latitude from Postal Code

We are now able to import co-ordinates for postal codes. Please let us know if you are interested in this functionality.

Phone number formatting on Client import

When importing phone numbers Pulse will attempt to format them correctly. This is important for display as well as sending SMS notifications.

General Improvements

Version 17.02 includes a number of interface improvements:

- Reduce the number of clicks required (for example, the form to send an email off the Service Request self-closes after sending)
- improved readability of lists of people
- consistent icons on document lists.

Background improvements to the database and code architecture should improve the speed of large lists of data. And finally, further changes to our internal processes mean we can continue to reduce downtime due to maintenance and further automate deployment to ensure you are always running the best code available.