










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.

View Attached Email

Download Show Recipients Show Email Header Reply

File created by Pulse from email.
From: Keith Norris
To: demo1@pulse-software.co.uk;
CC:
From: keithn@pulse-software.co.uk
Subject: Please could someone contact me regarding a new report
Hi Support

I rather urgently need a new report created for one of our high-priority reports. Please could someone contact me, below is the general outline of what I need.

Reporting Date	In SLA?	Title	RefNo	Priority	Status
10-Feb-17	Yes	Re: Network Issues	56487	High	Closed
06-Feb-17	No	Mail alerts	52119	High	Closed
12-Feb-17	Yes	Phones ringing randomly	57774	Medium	In Progress
12-Feb-17	Yes	Pizza in the office	57771	Low	Cancelled

■ Closed IN SLA
■ Closed OUT SLA

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.

Subject: Please could someone contact me regarding a new report
From: keithn@pulse-software.co.uk
Hi Support

I rather urgently need a new report created for one of our high-priority reports. Please could someone contact me, below is the general outline of

00h00 00h00 00h00 n/a 0

Reply to the Response quickly and easily



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.



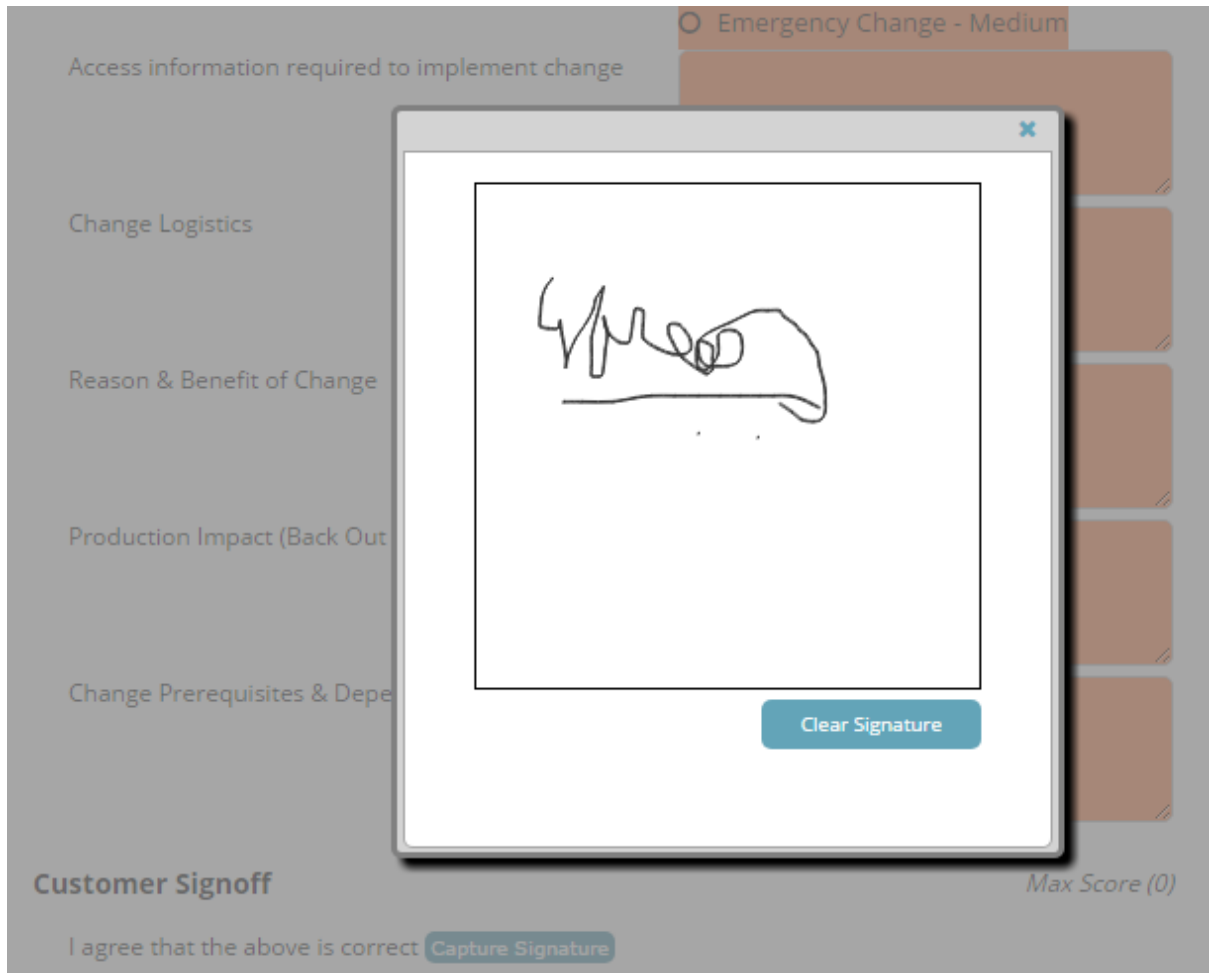
Selectively hide Categories on the mobile interface

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.

000417 Ticket Analysis

ACE Motors Kilkenny
Please could someone contact me regarding a new report
Acknowledged

Subject: Please could someone contact me regarding a new report
From: keithn@pulse-software.co.uk
Hi Support

I rather urgently need a new report created for one of our high-priority reports. Please

More Details

Consultant Responses Contact Person Responses System and hidden Responses

Date	Description
27 Feb 09:12 Kenny Durand Reporting Date 27 Feb 09:12 (Initial Setting) To New	Subject: Please could someone contact me regarding a new report ... From: keithn@pulse-software.co.uk Hi Support I rather urgently need a new report created for one of our high-priority reports. Please
27 Feb 09:13 Finn MacDonald From New To Acknowledged Time in previous status 27 Feb 09:12 - 27 Feb 09:13	----- Status set to Acknowledged; Description set from (Subject: Please could someone contact me regarding a new report From: keithn@pulse-software.co.uk Hi Support I rather urgently need a new r
28 Feb 07:38 Finn MacDonald	Scanned existing reports to look for one I can use.
28 Feb 07:39 Finn MacDonald	I need to contact the customer

Page 1 of 1 Show All Pages | Show System and Hidden Responses

Date Who Description

28 Feb 2017 07:46:17 Finn MacDonald

Finding location: failed

28 Feb 2017 07:45:43 Finn MacDonald OTP I phoned the custom

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.

[image: Inline image 1]

Token Cost 0

Quoted Hours 0 Quoted Amount GBP 0.00

27 Feb 2017 09:13:01 Finn MacDonald OTP

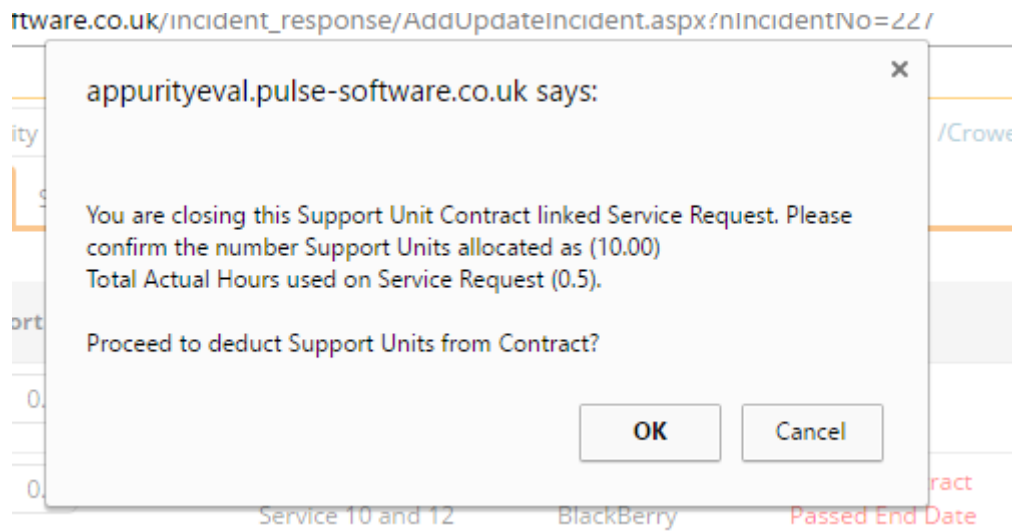
Status set to Acknowledged; Description set from
(Subject: Please could someone contact me
regarding a new report
From: keithn@pulse-software.co.uk
Hi Support

I rather urgently need a new report created for one

Page 1 of 2 Show All Pages | Show System and Hidden 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.

Fred Holt / (Details / Home)

Consultant Details ▾ Sales ▾ Service ▾ Inventory ▾ Client Financials ▾ Supplier Financials ▾ Consulta

Update Consultant Details

Details Successfully Saved.

First Name	<input type="text" value="Fred"/>	*	Surname	<input type="text" value="Holt"/>	*
Initials	<input type="text" value="SD"/>		Mobile	<input type="text" value="07952 362562"/>	
Telephone	<input type="text" value="018 442 9653"/>	*	Fax	<input type="text"/>	
Email	<input type="text" value="Demo-Fred@PulseTest.Pulse-software.co.uk"/>				* multiple seperated by comma (,)
Last Login	<input type="text" value="13 Feb 2017 09:50:04"/>		Last Seen	<input type="text" value="13 Feb 2017 14:48:10"/>	
Usual Location	<input type="text"/>		Last Known Location	<input type="text" value="51.60420841278046, -2.5182104221808075"/>	

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

Add Cycle Details

Cycle Details

Cycle Name	<input type="text" value="Check pabx vectors"/> *
Cycle Type	<input type="text" value="Ticket"/> *
Description for logging new Ticket	<input type="text" value="Check the <u>pabx</u> vectors for error messages"/> *
Status to use when making a new Ticket	<input type="text" value="New"/> *
Last Actioned Date	*Not yet Actioned*
	<input checked="" type="checkbox"/> Active

Category

Schedule

Use the following schedule to determine when the subscription is processed.

Subscription Cycle *

Schedule Details

On the following Day of the week

Sun Mon Tue Wed Thu Fri Sat

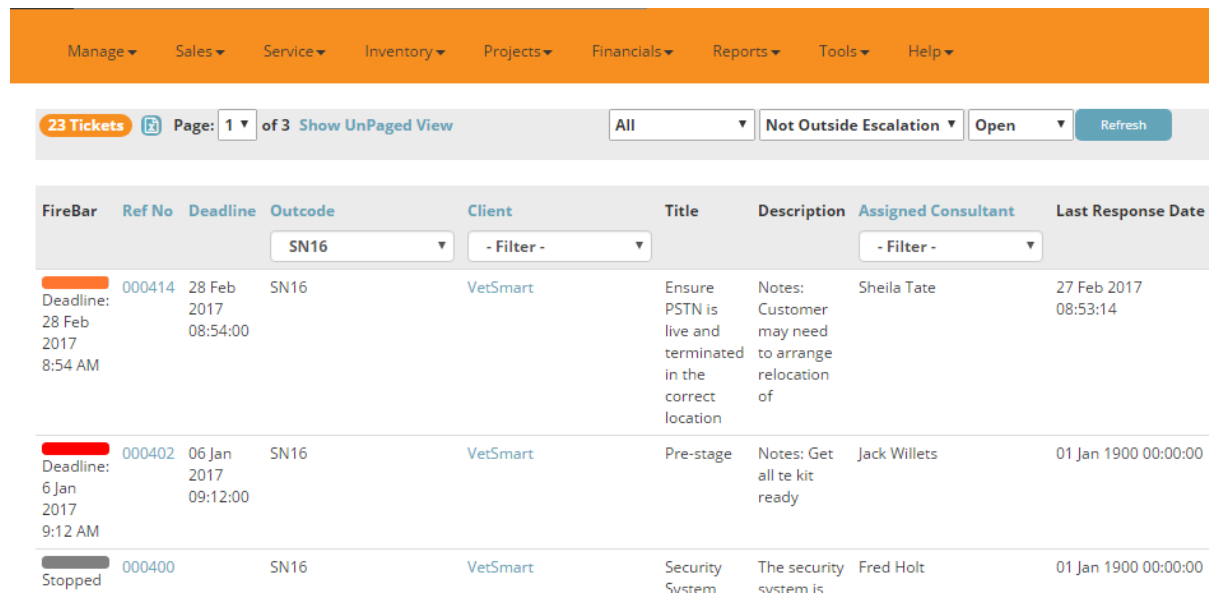
Default Catalogue Item on Quotes

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.



The screenshot shows a web interface for Pulse Software. At the top is a navigation bar with menu items: Manage, Sales, Service, Inventory, Projects, Financials, Reports, Tools, and Help. Below this is a summary bar showing '23 Tickets', 'Page: 1 of 3', and 'Show UnPaged View'. There are also filters for 'All', 'Not Outside Escalation', and 'Open', along with a 'Refresh' button. The main content is a table of tickets with columns: FireBar, Ref No, Deadline, Outcode, Client, Title, Description, Assigned Consultant, and Last Response Date. The Outcode column has a dropdown menu set to 'SN16'. The Client column has a dropdown menu set to '- Filter -'. The table contains three rows of ticket data.

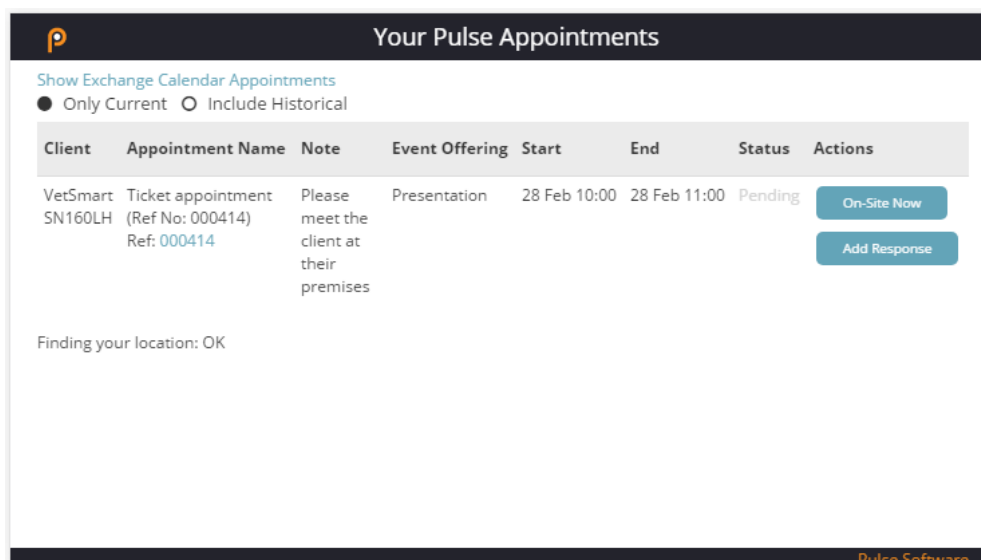
FireBar	Ref No	Deadline	Outcode	Client	Title	Description	Assigned Consultant	Last Response Date
Deadline: 28 Feb 2017 8:54 AM	000414	28 Feb 2017 08:54:00	SN16	VetSmart	Ensure PSTN is live and terminated in the correct location	Notes: Customer may need to arrange relocation of	Sheila Tate	27 Feb 2017 08:53:14
Deadline: 6 Jan 2017 9:12 AM	000402	06 Jan 2017 09:12:00	SN16	VetSmart	Pre-stage	Notes: Get all te kit ready	Jack Willets	01 Jan 1900 00:00:00
Stopped	000400		SN16	VetSmart	Security System	The security system is	Fred Holt	01 Jan 1900 00:00:00

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.



The screenshot shows the mobile interface for Pulse Software. At the top is a header 'Your Pulse Appointments' with the Pulse logo. Below this is a section 'Show Exchange Calendar Appointments' with radio buttons for 'Only Current' (selected) and 'Include Historical'. The main content is a table of appointments with columns: Client, Appointment Name, Note, Event Offering, Start, End, Status, and Actions. The table contains one row of appointment data. Below the table is a status message 'Finding your location: OK'.

Client	Appointment Name	Note	Event Offering	Start	End	Status	Actions
VetSmart SN160LH	Ticket appointment (Ref No: 000414) Ref: 000414	Please meet the client at their premises	Presentation	28 Feb 10:00	28 Feb 11:00	Pending	On-Site Now Add Response

Finding your location: OK

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.

The screenshot shows a web interface for creating an email campaign. A modal dialog box titled "Send test email" is open, allowing the user to enter recipient details. The background interface includes fields for "Medium", "Start Time", "Email Subject Line", "Send From Email Address", "Email Source File", "Use Template File", "Upload file", "Make New File", and a "Prepare to send" section with buttons for "Prepare HTML for email", "Send a test email", "Approved", and "Sent". A blue arrow points from the "Send a test email" button in the background to the "Send Test" button in the modal dialog.

Field	Value
First Name	John
Surname Name	Tupkins
Email address	john@tupkins.org

Buttons: Send Test, Save Campaign

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.

Pulse Live Site

System Details System Contracts Options Settings Descriptors Configurations Tickets History

System 'Pulse Live Site' - Covered by Contract

Type	Contract	Covered From	Covered To	Min Months	Priced By
<input checked="" type="radio"/> Customer	-Please Select-	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	Monthly
<input type="radio"/> Supplier	Pulse Combined Monthly Invoice (PO PSB016645) - (STAN006/006)				

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.

Send "Pulse Built In: Top 10 Ticket Opening Clients" DIY Report To

Front Page **Pulse Menu**

Item Name

Select a Menu Item from the list below to link the DIY Report to

The following menu has been selected: **(Reports)**

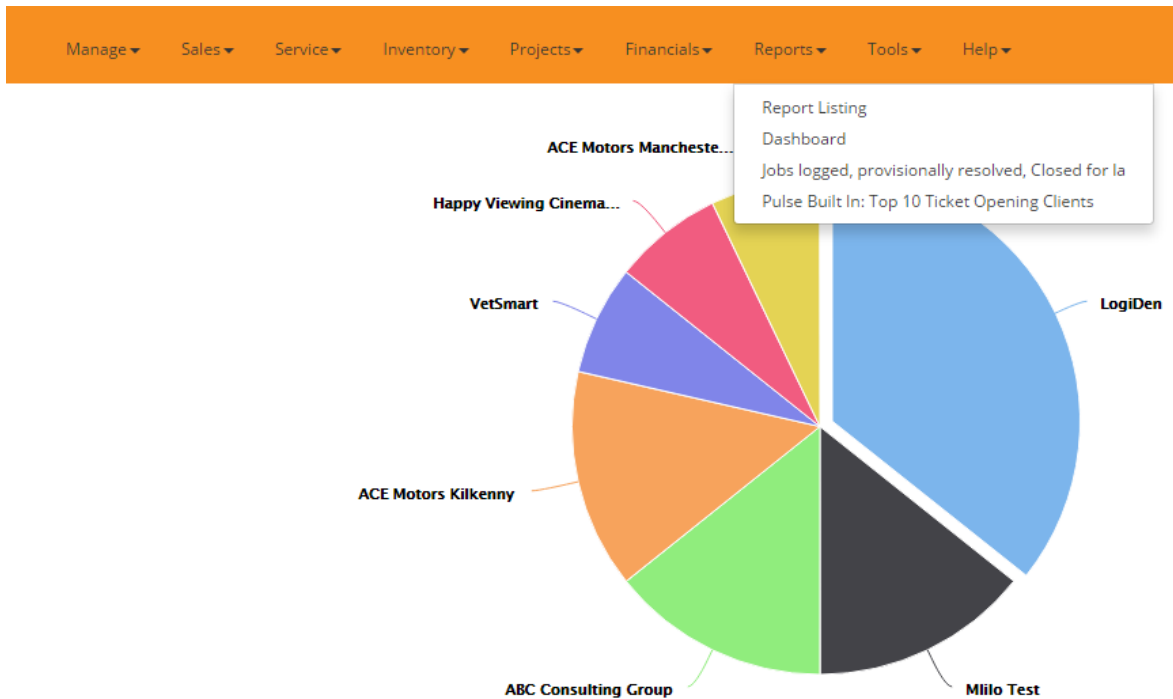
Manage ▾ Sales ▾ Service ▾ Inventory ▾ Projects ▾ Financials ▾ **Reports ▾** Tools ▾ Help ▾

Select which Clearance Level(s) are able to view this DIY Report

- Finance User
- Management
- Sales Consultant
- Sales Manager
- Service Consultant
- Service Manager
- System Administrator

Target Page

- New Page
- Pulse Main Content Area



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.

VetSmart - / Ticket (Service / Ticket)

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


Deadline: 6 Jan 2017 9:12 AM	11:11:11	te kit ready	SLA	Add New
Stopped Overdue [Time to Update] Target: 4 Jan 2017 7:30 AM (General SLA)	000400 03 Jan 2017 19:35:23	Security System reporting false alarms	The security system is reporting false alarms in the mornings	Fred Holt New
Stopped Overdue	000399 03 Jan 2017 13:53:20	Router VPN not working	The VPN link to the	Jack Willets New




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.

My Home ⚙ Service  T-Sheets and E-Claims

Assigned to you

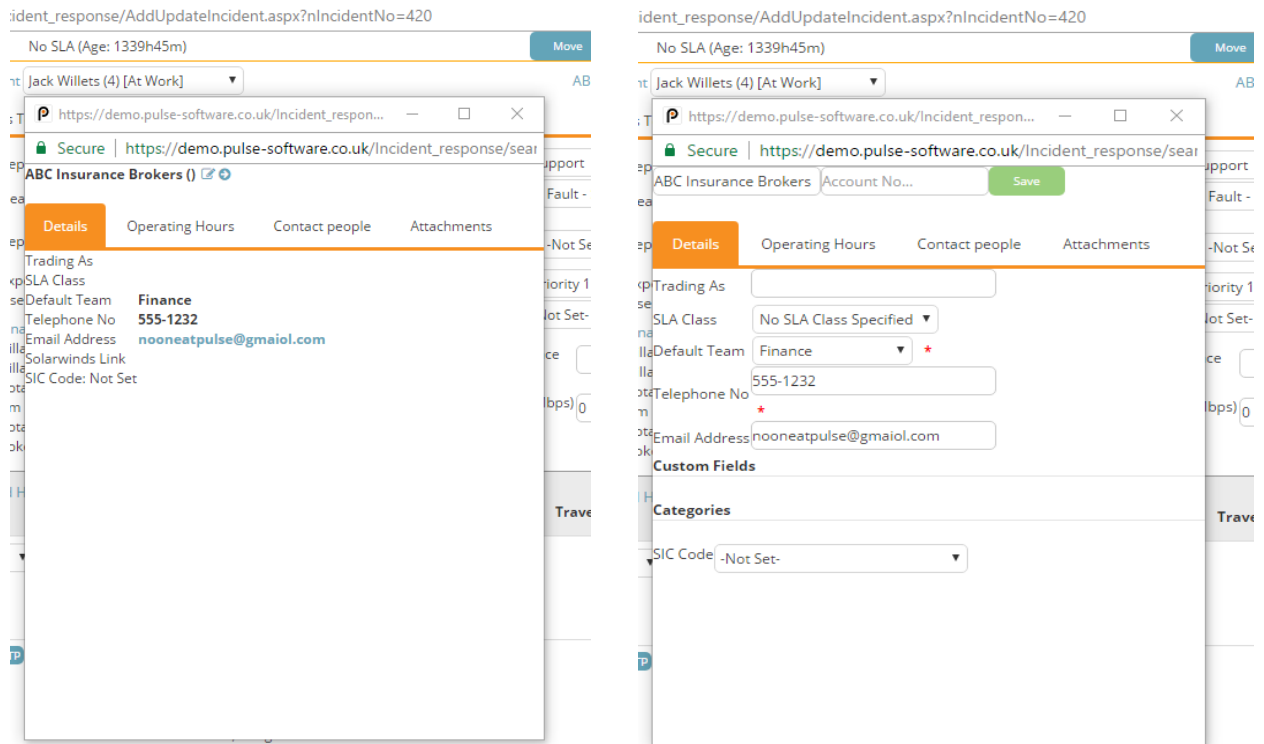
16 Tickets  Page: of 2 [Show UnPaged View](#)

FireBar	Ref No	Reporting Date	Deadline	Target Date
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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.