



PULSE BUSINESS SOFTWARE

Cloud-based software that drives your business.

Pulse Release Notes – Version 21.02

Highlights

Service

- ★ View Nearby Technicians on the Service Request Map
- ★ Suggest a Technician for a Service Request Based on Postcode
- ★ Per-Parent-Client Statuses
- ★ Per-Parent-Client Categories and Custom Fields
- ★ Send an Email Off the Service Request As the Logged-In Consultant
- ★ Status Change Timeline View

Inventory

- ★ New Fields Available on the Catalogue Item

Client Portal

 Store Portal Enhancements

 Print Job Cards

 Only View Responses With Status Changes

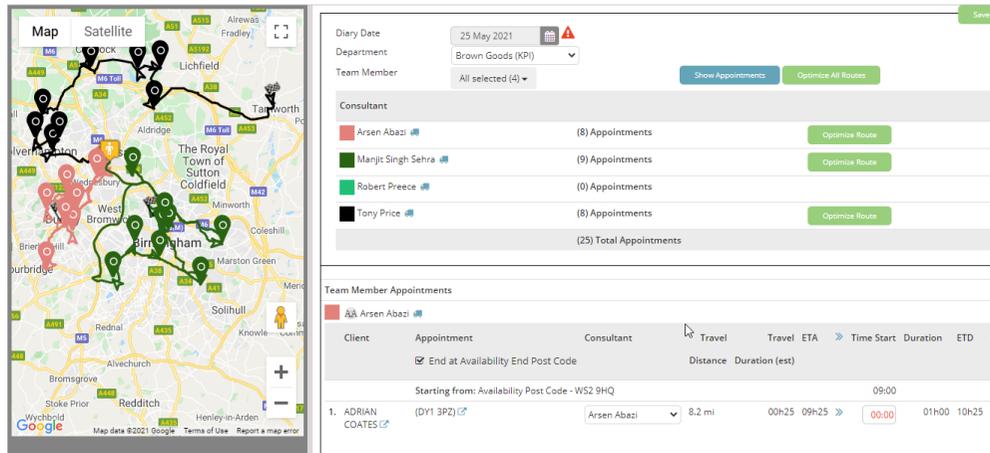
DIY Reports

 A New Map View

Service

★ View Nearby Technicians on the Service Request Map

You can now view the engineers close to the job to aid in scheduling field calls.



The screenshot displays a service request management interface. On the left is a map of Birmingham, UK, with several service request locations marked by colored pins. On the right, a control panel shows the following details:

- Diary Date: 25 May 2021
- Department: Brown Goods (KPI)
- Team Member: All selected (4)
- Buttons: Show Appointments, Optimize All Routes
- Save button

Below the controls is a list of consultants and their appointment counts:

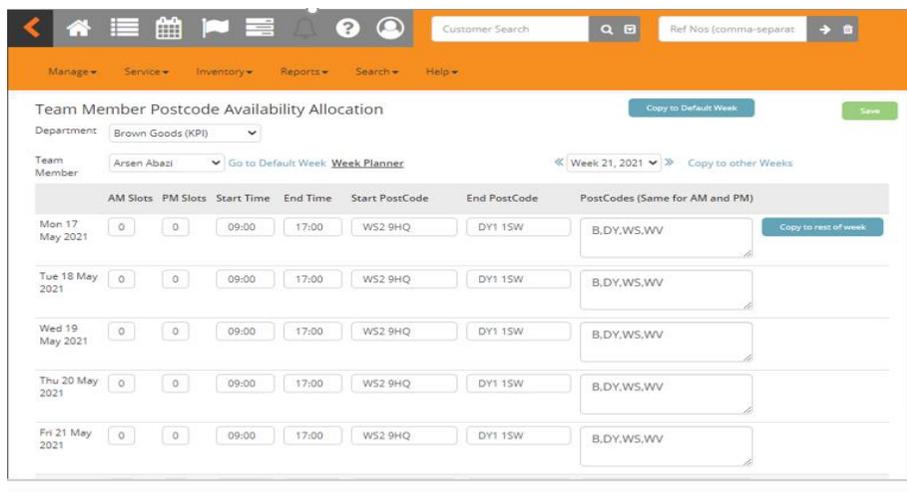
Consultant	Appointments	Action
Arsen Abazi	(8) Appointments	Optimize Route
Manjit Singh Sehra	(9) Appointments	Optimize Route
Robert Preece	(0) Appointments	
Tony Price	(8) Appointments	Optimize Route
(25) Total Appointments		

Below this is a 'Team Member Appointments' table:

Client	Appointment	Consultant	Travel Distance	Travel Duration (est)	Travel ETA	Time Start	Duration	ETD	Ref
Starting from: Availability Post Code - WS2 9HQ									
1. ADRIAN COATES	(DY1 3PZ)	Arsen Abazi	8.2 mi	00h25	09h25	09:00	01h00	10h25	058

★ Suggest a Technician for a Service Request Based on Postcode

If there are 2 jobs with the same postcode it will now suggest that same engineer to go to those 2 jobs.



The screenshot shows a 'Team Member Postcode Availability Allocation' interface. The top navigation bar includes 'Customer Search' and 'Ref Nos (comma-separated)'. The main content area is titled 'Team Member Postcode Availability Allocation' and includes the following details:

- Department: Brown Goods (KPI)
- Team Member: Arsen Abazi
- Buttons: Copy to Default Week, Save
- Week Planner: Week 21, 2021
- Buttons: Go to Default Week, Week Planner, Copy to other Weeks

The main table displays the availability allocation for the week of May 17, 2021, to May 21, 2021:

Date	AM Slots	PM Slots	Start Time	End Time	Start PostCode	End PostCode	PostCodes (Same for AM and PM)	Action
Mon 17 May 2021	0	0	09:00	17:00	WS2 9HQ	DY1 1SW	B,DY,WS,WV	Copy to rest of week
Tue 18 May 2021	0	0	09:00	17:00	WS2 9HQ	DY1 1SW	B,DY,WS,WV	
Wed 19 May 2021	0	0	09:00	17:00	WS2 9HQ	DY1 1SW	B,DY,WS,WV	
Thu 20 May 2021	0	0	09:00	17:00	WS2 9HQ	DY1 1SW	B,DY,WS,WV	
Fri 21 May 2021	0	0	09:00	17:00	WS2 9HQ	DY1 1SW	B,DY,WS,WV	



Per-Parent-Client Statuses

It is now possible to have a set of statuses available per parent client. This means that only those statuses are available on Service Requests for the client and its children.



Per-Parent-Client Categories and Custom Fields on the Service Request

Similar to the statuses above, it is now possible to have a set of Categories and Custom fields available per parent client.

B (Section Type)
-Not Set- ▼

B (Section Code)
-Not Set- ▼

Job Fault Code
-Not Set- ▼

Damage Type
-Not Set- ▼

Order Number *
23DTCS

Policy No. *
EK90022888

KF Store
ScrewFix Bootle (152) ▼

Store Colleague Name
Fao Manager

Store Colleague Position
Manager

Order Number *
A6679422945

Purchase Date
01 Aug 2020  

Collect Product From
Store ▼

Return Product To
Store ▼

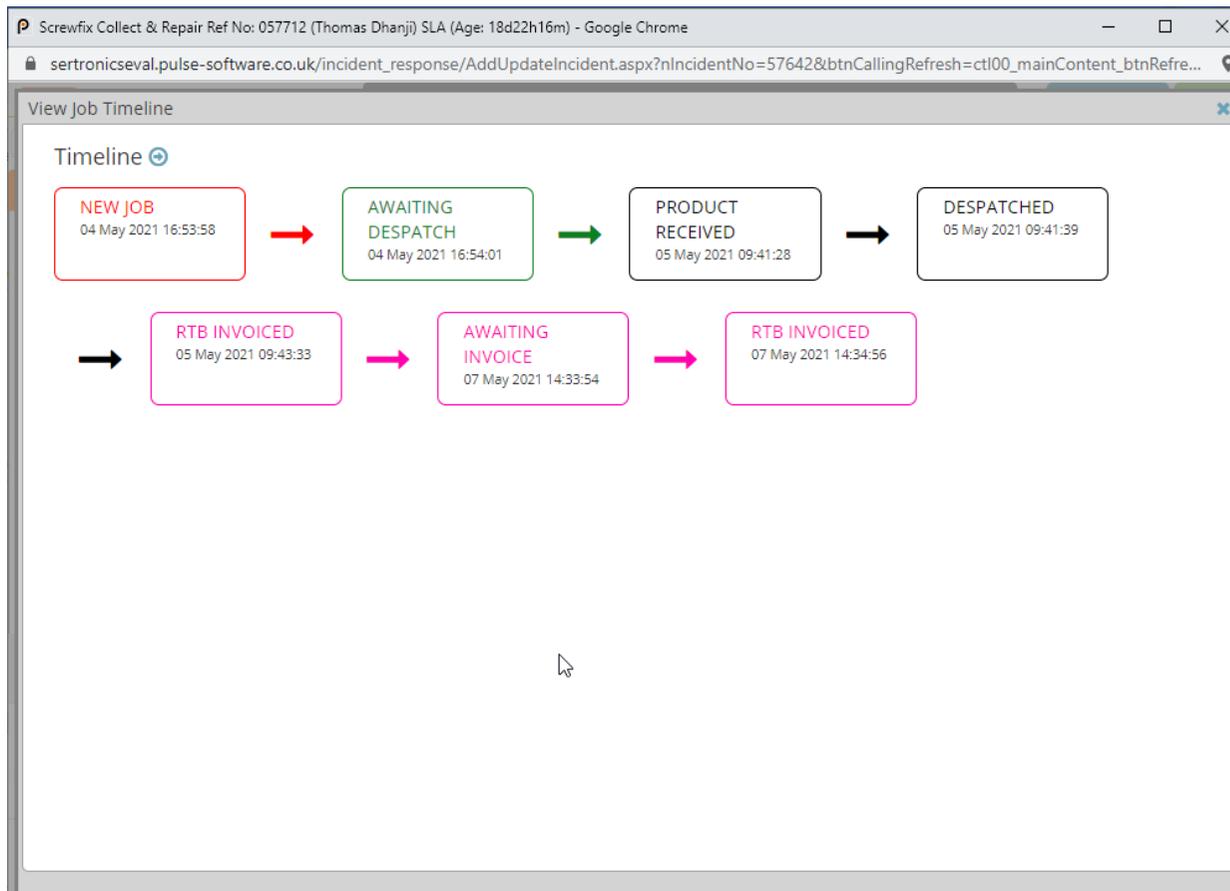
Warranty Status
In ▼

★ **Send an Email Off the Service Request As the Logged-In Consultant**

It is now possible to set Pulse to show the logged in consultant as the sender of the email.

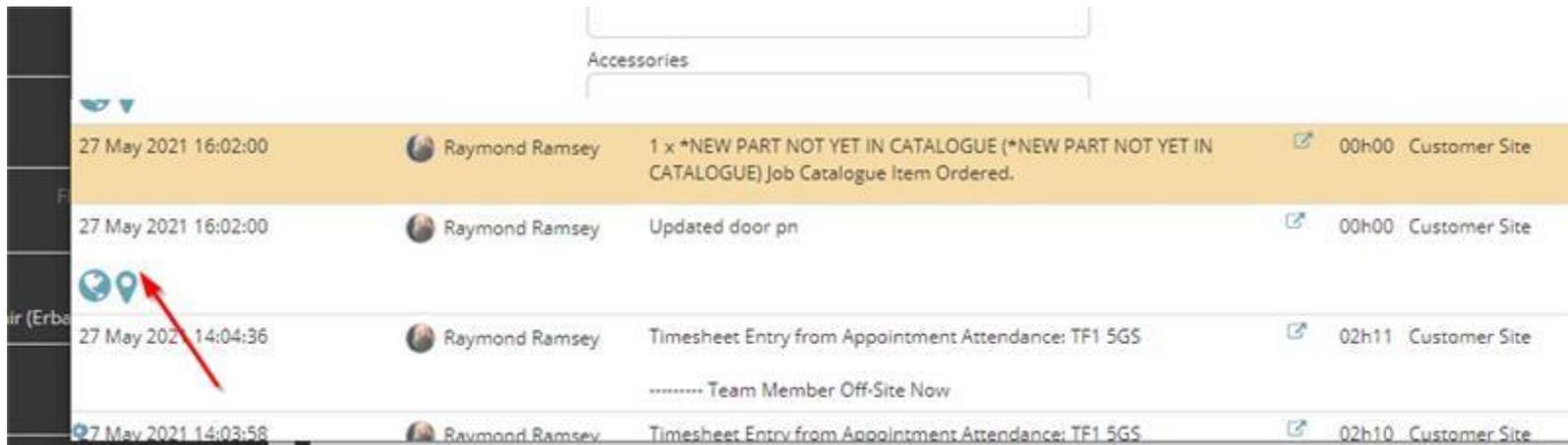
★ **Status Change Timeline View**

View a timeline of responses that include a status change in an easy-to-read graphical layout.



Mobile Location

Every response made on the new mobile app records the location.



Time	User	Description	Duration	Location
27 May 2021 16:02:00	Raymond Ramsey	1 x *NEW PART NOT YET IN CATALOGUE (*NEW PART NOT YET IN CATALOGUE) Job Catalogue Item Ordered.	00h00	Customer Site
27 May 2021 16:02:00	Raymond Ramsey	Updated door pn	00h00	Customer Site
27 May 2021 14:04:36	Raymond Ramsey	Timesheet Entry from Appointment Attendance: TF1 5GS ----- Team Member Off-Site Now	02h11	Customer Site
27 May 2021 14:03:58	Raymond Ramsey	Timesheet Entry from Appointment Attendance: TF1 5GS	02h10	Customer Site

Warn the Consultant if the Voucher Balance is Zero

When a user first links a ticket to a contract *that is an explicit deduction contract*, if the balance of vouchers is zero the user will get a message notifying them that the balance is zero.

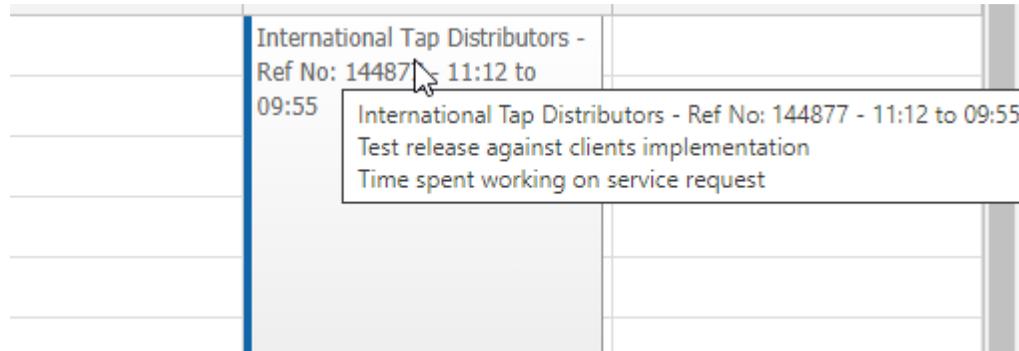


iteceval.pulse-software.co.uk says
This Contract has a Voucher balance of zero or below

Number	Avail Vouchers	End Date	Tokens
No Contract			
00003044	0.00	10 Jun 2021	30 Jun 2021

Service Request Detail on the Timesheet Activity Edit

When you hover over a timesheet entry you will see the title and customer name.



The image shows a table with a tooltip. The tooltip text is as follows:

International Tap Distributors - Ref No: 144877 - 11:12 to 09:55	International Tap Distributors - Ref No: 144877 - 11:12 to 09:55 Test release against clients implementation Time spent working on service request
--	--

Reassigning the Service Request when a Linked Appointment is Reassigned

When a scheduled event is re-assigned to another consultant via the Google Maps Route planning, the ticket is now also re-assigned to that new consultant.

One Time Pins From Checklists

A new question type allows sending the OTP to a recipient selected in the dropdown, or you can manually capture the email address.

Recipient: -Other Contact Person- ▾

Name:

EMAIL SMS

Address/Number:

OTP:

SLA Display Improved to Show Days

Instead of just Hours and Minutes, the SLA display now formats to DD:HH:MM.

Reporting Date: 01 Jun 2021 09:47:26

SLA: Pulse General SLA X

0 - Consistency

Time to First Responded: 03h00m-WH

1 - Breakdown - System down

Time to First Responded: 0d0h30m-24/7

Time to Tentatively complete: 0d1h0m-24/7

2 - Serious

Ticket Type: Fault ▾ *

Sub-type: 2 - Serious ☹ ▾ * 🟢

Client Type: Standard ▾

Quoted UK: -Not Set- ▾

Platform: -Not Set- ▾

Pulse Module: Sales ▾ *

Queue Position: 1 ▾

RFC required: -Not Set- ▾

Deploy Release:

Inventory

★ New Fields Available on the Catalogue Item

Height, Width, Length, Weight, EAN Code and Support Note are now supported.

Item List | **Catalogue Item Details** | Sales Price Maintenance | Catalogue Item Options | Settings | Descriptors | Configurations | Cycles | Common Logs | Job Category

Update Catalogue Item - 'DOOR NTC'

Type: Tumble Dryers Part *
 Catalogue Item Bundle Container

Catalogue Name: DOOR NTC *
 Hidden Favourite

Description: [Empty text area]

Details | Types | Dimensions | Hazard Category | Financials | Accounts | Last Seen

Template: Catalogue Item Barcode for Label Printer.rdl
Make: BEKO *
Series Name: [Empty]
Model Number: 2971900100 *
EAN Code: [Empty]
Foreign Key: [Empty]
Supplier Model #: [Empty]
Supplier: BEKO PLC
Support Note: [Empty]

Item List | **Catalogue Item Details** | Sales Price Maintenance | Catalogue Item Options | Settings | Descriptors | Configurations | Cycles | Common Logs | Job Category

Update Catalogue Item - '(002/D BX KF) Self Tapping Screw'

Type: Parts *
 Catalogue Item Bundle Container

Catalogue Name: (002/D BX KF) Self Tapping Screw *
 Hidden Favourite

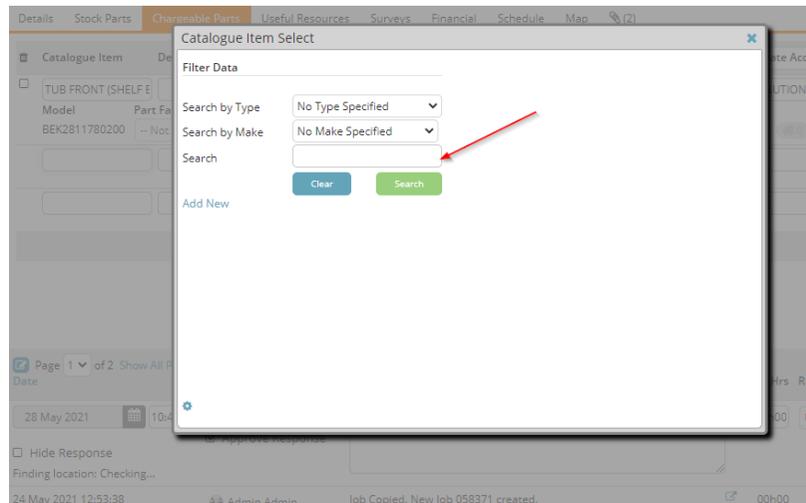
Description: Self Tapping Screw

Details | Types | **Dimensions** | Hazard Category | Financials | Accounts | Last Seen

Height (mm): [0]
Width (mm): [0]
Length (mm): [0]
Weight (kg): [0]

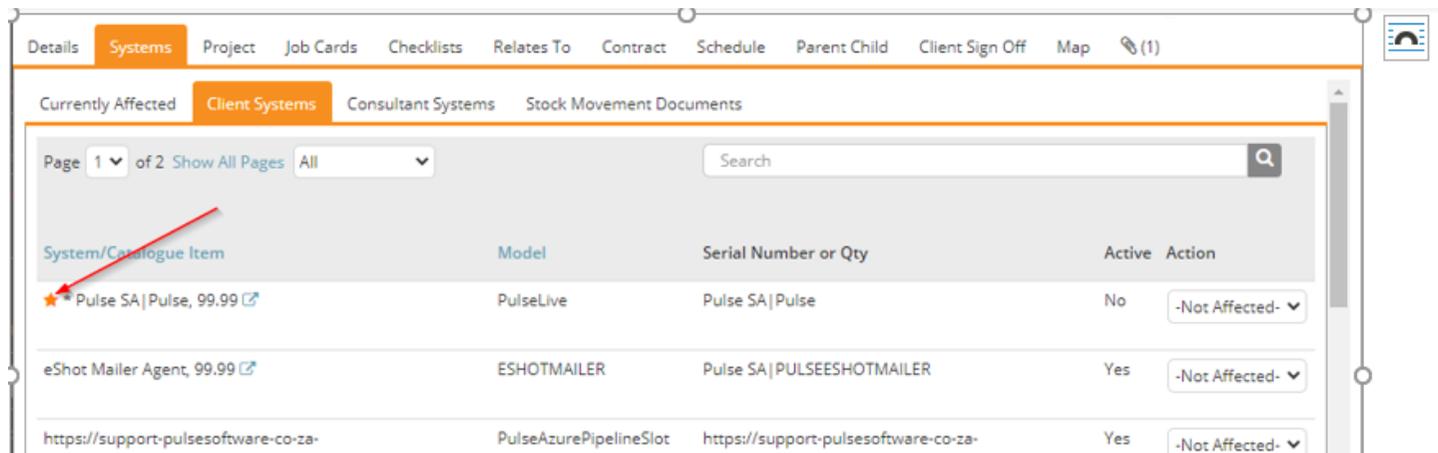
Product Search

Catalogue Item select now has a combined search which can be used to search for different fields like EAN and SKU.



Systems on Service Request – View Favourites First

When displaying systems on the incident favourites are now placed at the top of the list.

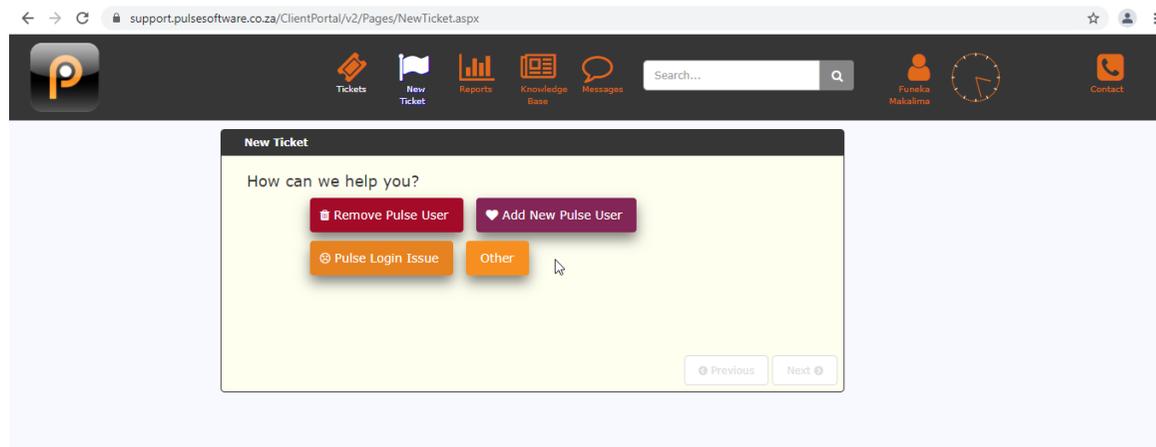


Client Portal

☆ Store Portal Enhancements

We have made significant progress in developing the Client Portal into a fully-fledged retail Store Portal. It is now possible to capture new clients in-store, and log jobs against them. For more complicated in-store requirements a single store login can give access to multiple brands with their own logos, categories, custom fields and stock.

Keep an eye on our website for our upcoming videos on this topic.



☆ Print Job Cards

Job cards can now be printed from the client portal.



★ Only View Responses With Status Changes

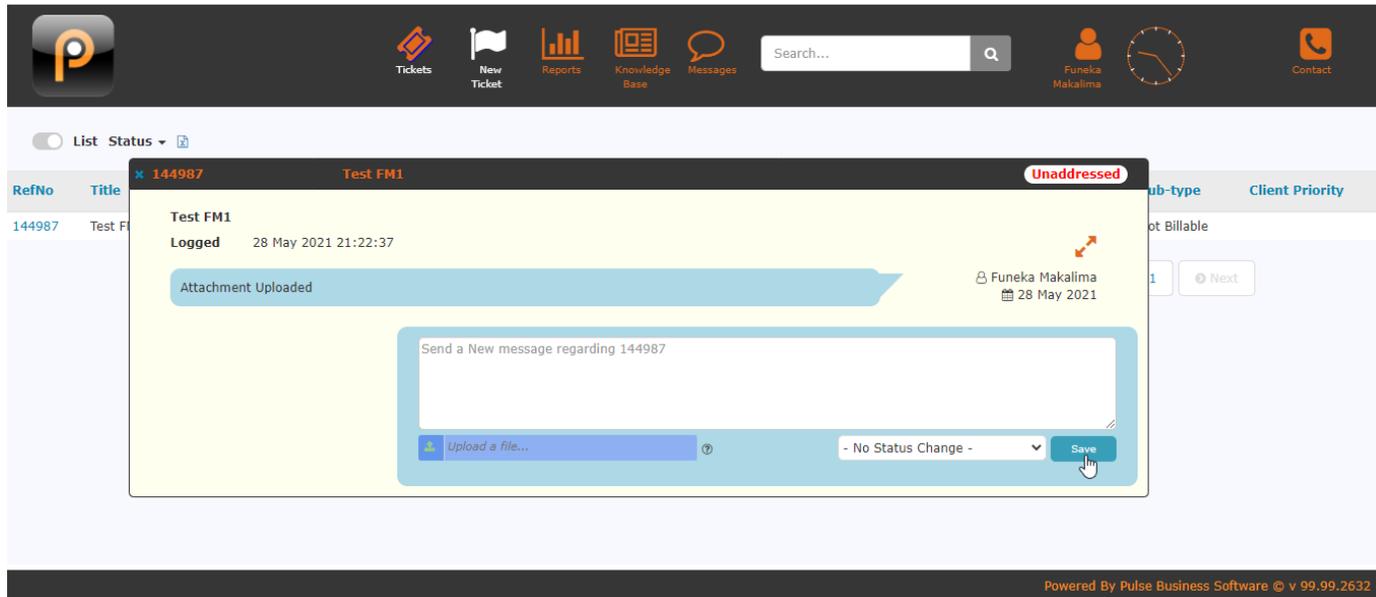
It is now possible to configure the Client Portal to show only responses that include a status change.

Show Client Status on Client Portal

It is now possible to set the Client Portal to show the client status on responses.

Show Who Uploaded Attachment

Pulse now shows the name of the person that uploaded attachments.



The screenshot displays the Pulse Client Portal interface. At the top, there is a navigation bar with icons for Tickets, New Ticket, Reports, Knowledge Base, Messages, a search bar, and user profile information for Funeka Makalima. Below the navigation bar, a ticket list is visible with columns for RefNo, Title, Status, Sub-type, and Client Priority. The selected ticket is 144987, titled 'Test FM1', with a status of 'Unaddressed'. The ticket details show it was logged on 28 May 2021 at 21:22:37. A notification bar indicates 'Attachment Uploaded' by Funeka Makalima on 28 May 2021. Below the notification, there is a text input field for sending a new message regarding the ticket, an 'Upload a file...' button, a status change dropdown menu currently set to '- No Status Change -', and a 'Save' button.

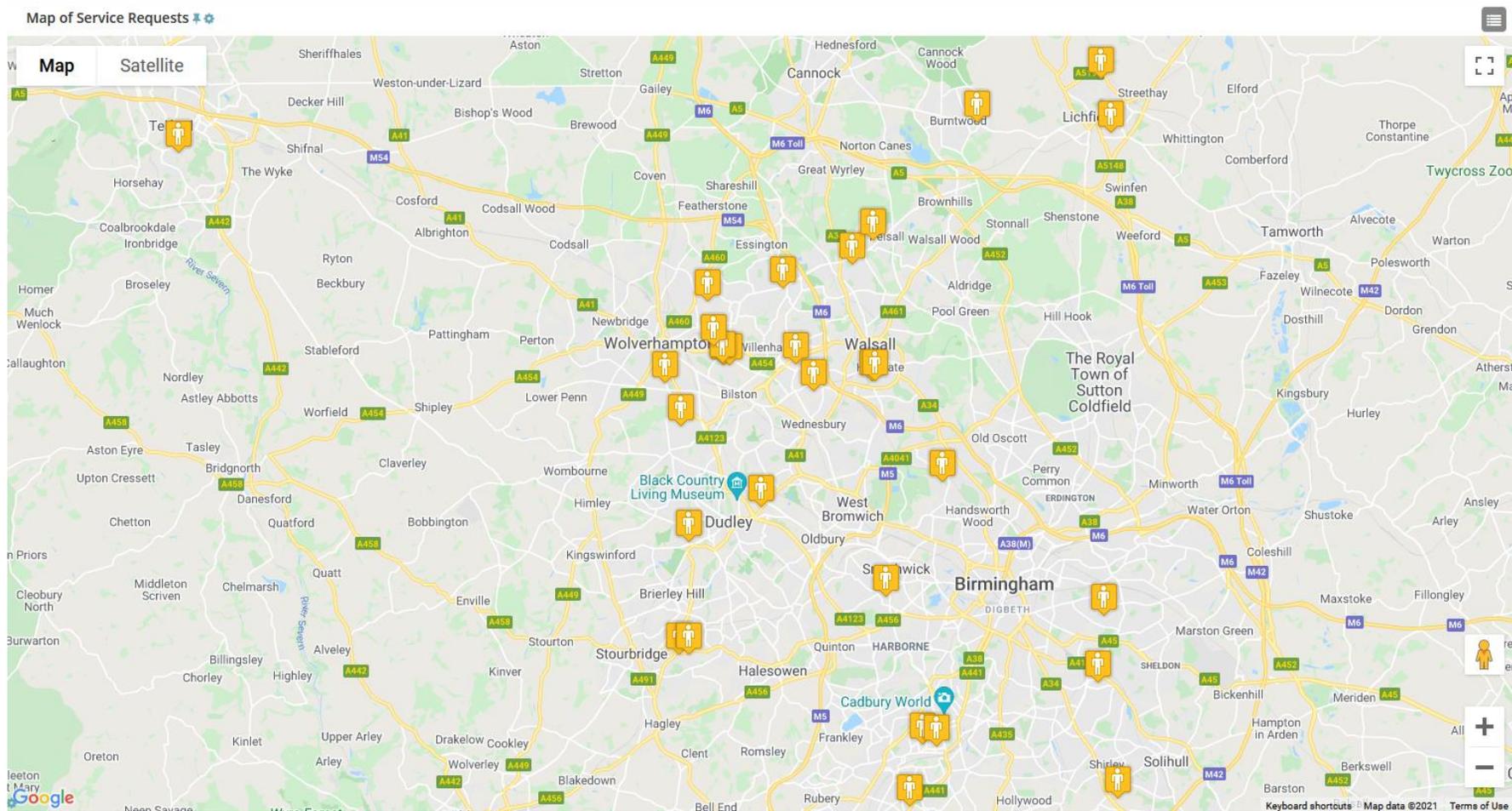
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DIY Reports



A New Map View

Using data captured and extracted from Pulse, a map can now be generated from the DIY reports.



Core

General Speed and Security Improvements

We have improved the speed of the application through a combination of code and database improvements. For example, we have vastly increased the use of parameterisation to increase the speed of SQL statements. We have also streamlined the emails sent to reset passwords, and have made a few improvements to the logging of errors to help identify bugs or security issues.