



**PULSE BUSINESS SOFTWARE**

Cloud-based software that drives your business.

## Pulse Release Notes – Version 21.02

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### 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 web interface for viewing nearby technicians. On the left is a map of Birmingham, UK, with several location pins. On the right is a form and a list of technicians.

**Form Fields:**

- Diary Date: 25 May 2021
- Department: Brown Goods (KPI)
- Team Member: All selected (4)

**Buttons:** Show Appointments, Optimize All Routes, Save

**Consultant List:**

Consultant	Appointments	Optimize Route
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		

**Team Member Appointments Table:**

Client	Appointment	Consultant	Travel Distance	Travel Duration (est)	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 web interface for allocating technicians based on postcode availability. The top navigation bar includes links for Manage, Service, Inventory, Reports, Search, and Help.

**Team Member Postcode Availability Allocation**

Department: Brown Goods (KPI)

Team Member: Arsen Abazi

Week Planner: Week 21, 2021

	AM Slots	PM Slots	Start Time	End Time	Start PostCode	End PostCode	PostCodes (Same for AM and PM)
Mon 17 May 2021	0	0	09:00	17:00	WS2 9HQ	DY1 1SW	B,DY,WS,WV
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.

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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

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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

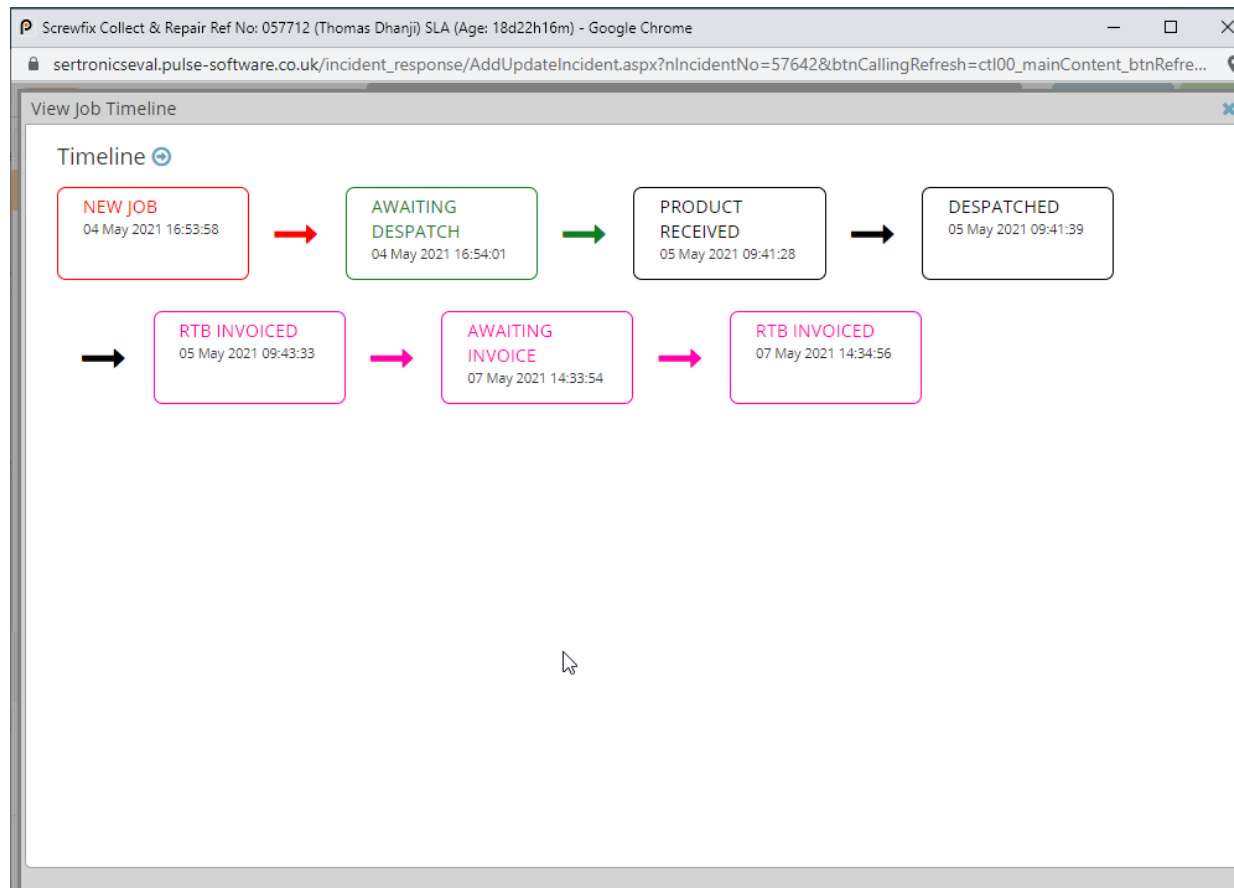
Warranty Status  
In

## ★ 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.

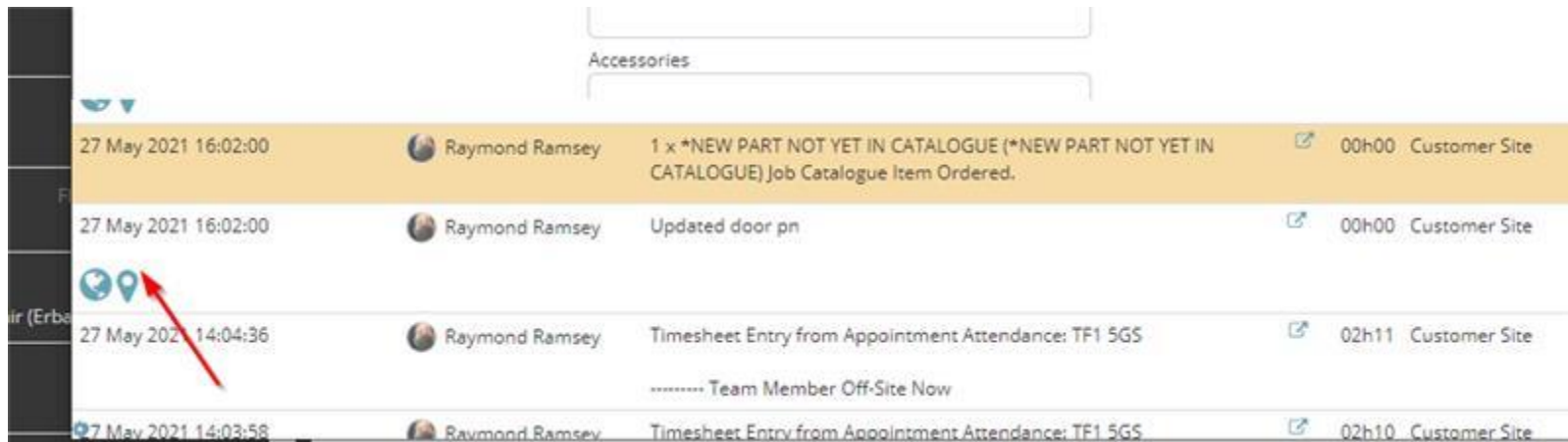
## ★ Status Change Timeline View

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



## Mobile Location

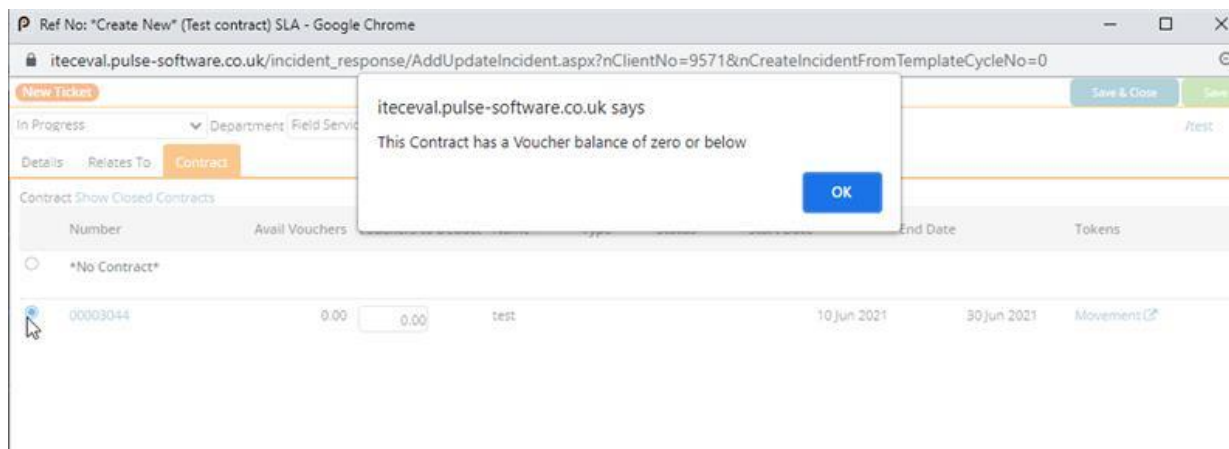
Every response made on the new mobile app records the location.



			Accessories		
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 use will get a message notifying them that the balance is zero.



Ref No: \*Create New\* (Test contract) SLA - Google Chrome

iteceval.pulse-software.co.uk/incident\_response/AddUpdateIncident.aspx?nClientNo=95718&nCreateIncidentFromTemplateCycleNo=0

New Ticket

In Progress Department Field Service

Details Relates To Contract

Contract Show Closed Contracts

Number Avail Vouchers End Date Tokens

\*No Contract\*

00003044 0.00 0.00 test 10 Jun 2021 30 Jun 2021 Movement

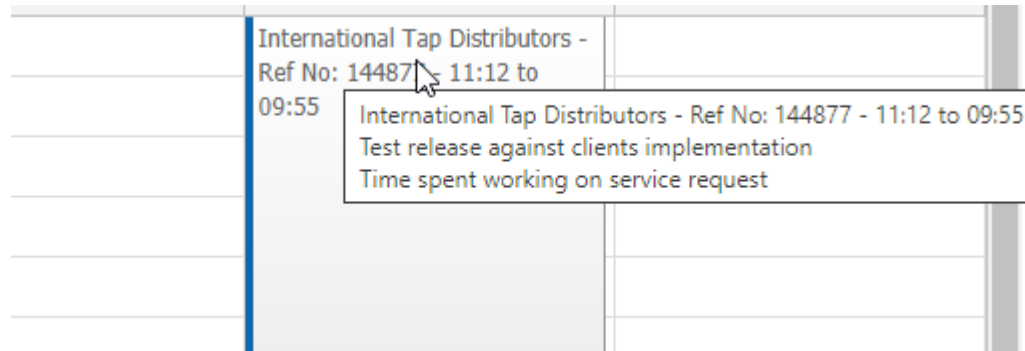
iteceval.pulse-software.co.uk says  
This Contract has a Voucher balance of zero or below

OK

Save & Close Save

### Service Request Detail on the Timesheet Activity Edit

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



The screenshot shows a table with multiple rows. The second row from the top is highlighted with a blue vertical bar on its left side. A mouse cursor is hovering over the text '11:12' in this row. A tooltip box appears to the right of the cursor, containing the following text: 'International Tap Distributors - Ref No: 144877 - 11:12 to 09:55', 'Test release against clients implementation', and 'Time spent working on service request'.

International Tap Distributors - Ref No: 144877	11:12 to 09:55	

### 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.





# 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

Description

Details

Types

Dimensions

Hazard Category

Financials

Accounts

Last Seen

Template

Catalogue Item Barcode for Label Printer.rdl

Make

BEKO

Series Name

Model Number

2971900100

EAN Code

Foreign Key

Supplier Model #

Supplier

BEKO PLC

Support Note

[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

Description

Self Tapping Screw

Details

Types

Dimensions

Hazard Category

Financials

Accounts

Last Seen

Height (mm)

0

Width (mm)

0

Length (mm)

0

Weight (kg)

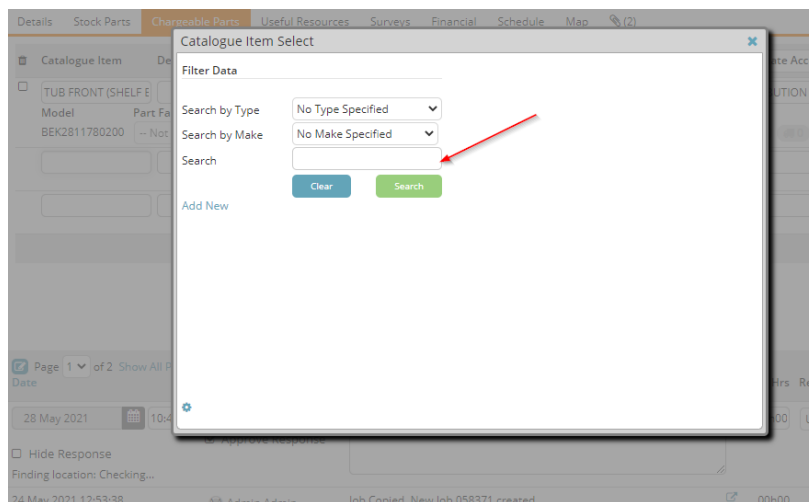
0

Last Modified by admin:keith at 20 Mar 2021 12:13:43

Save

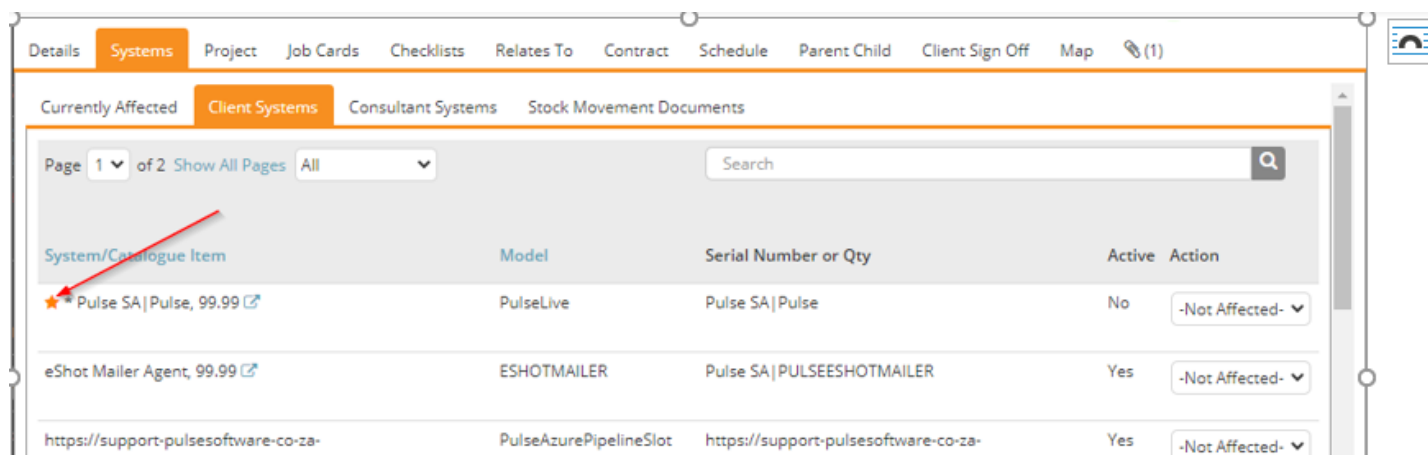
## Product Search

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.

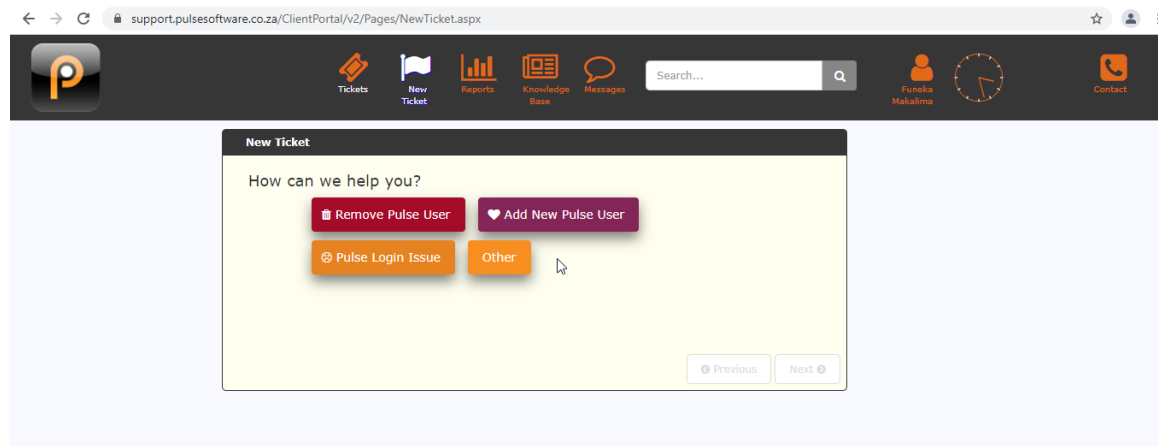


## Client Portal

### ☆ 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.

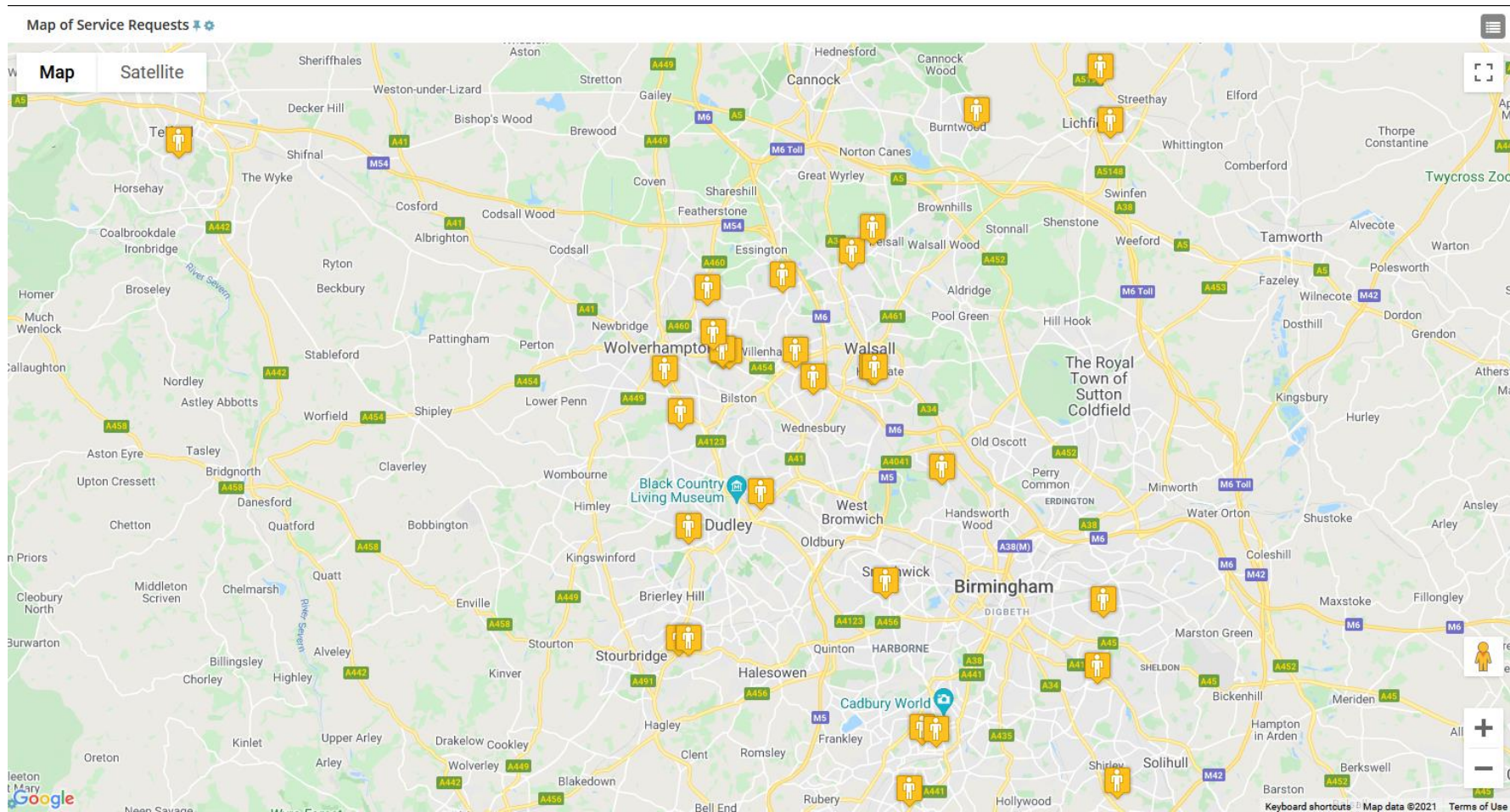
The screenshot displays the Pulse Client Portal interface. At the top, there is a dark navigation bar with icons for Tickets, New Ticket, Reports, Knowledge Base, Messages, a search bar, and user profile (Funeka Makalima). Below this, the main content area shows a ticket detail view for ticket 144987, titled "Test FM1". The ticket status is "Unaddressed". A message from "Funeka Makalima" dated "28 May 2021" is visible, stating "Attachment Uploaded". Below the message, there is a text input field for sending a new message, an "Upload a file..." button, a status change dropdown menu currently set to "- No Status Change -", and a "Save" button. The footer of the page indicates "Powered By Pulse Business Software © v 99.99.2632".

## 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.