Release Notes – Version 19.10

Watershed Items

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

Service

- ⭐ Set a reminder on Service Requests
- ⭐ An alternative default consultant on clients
- ⭐ Set custom fields as mandatory on mobile only
- ⭐ Checklists now available on mobile
- ⭐ Edit event times on mobile
- ⭐ The New Incident Wizard now supports custom fields
- ⭐ Suggested Assignment for Field Service
- ⭐ Next Business Day SLA's

Inventory

- ⭐ Add images to Catalogue Items and view them on associated Systems

Service

⭐ **Set a Reminder on Service Requests**

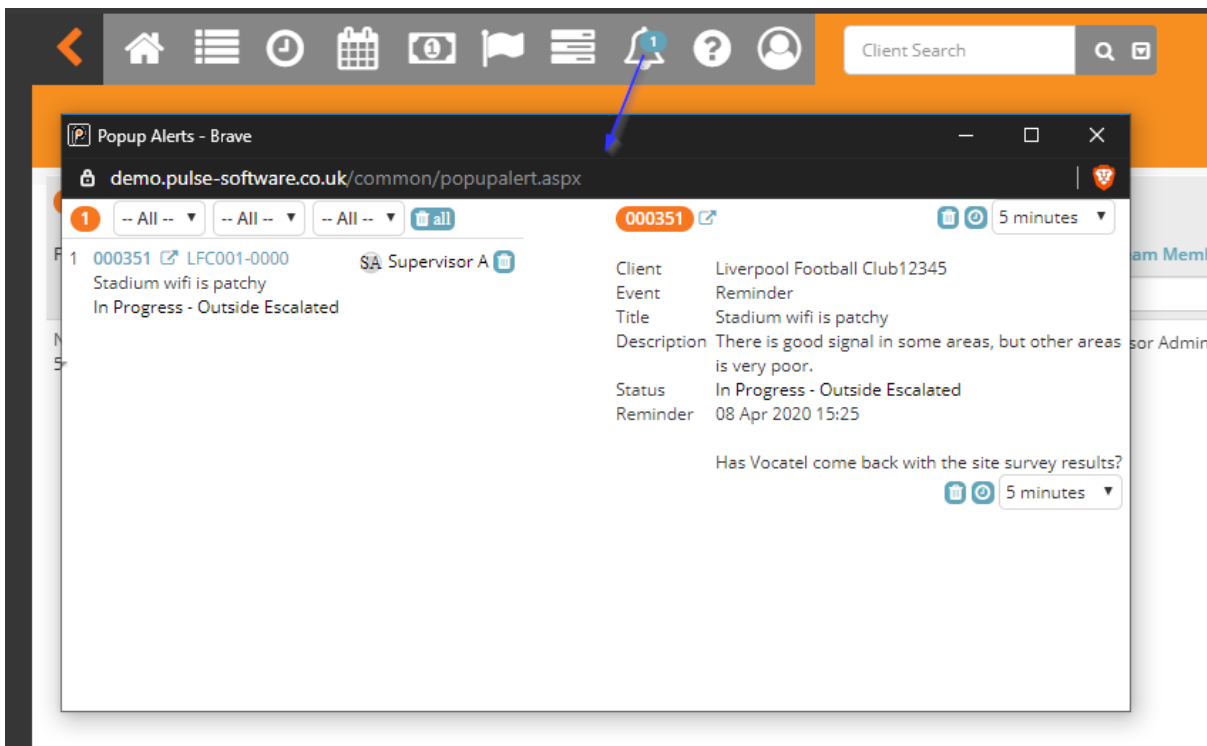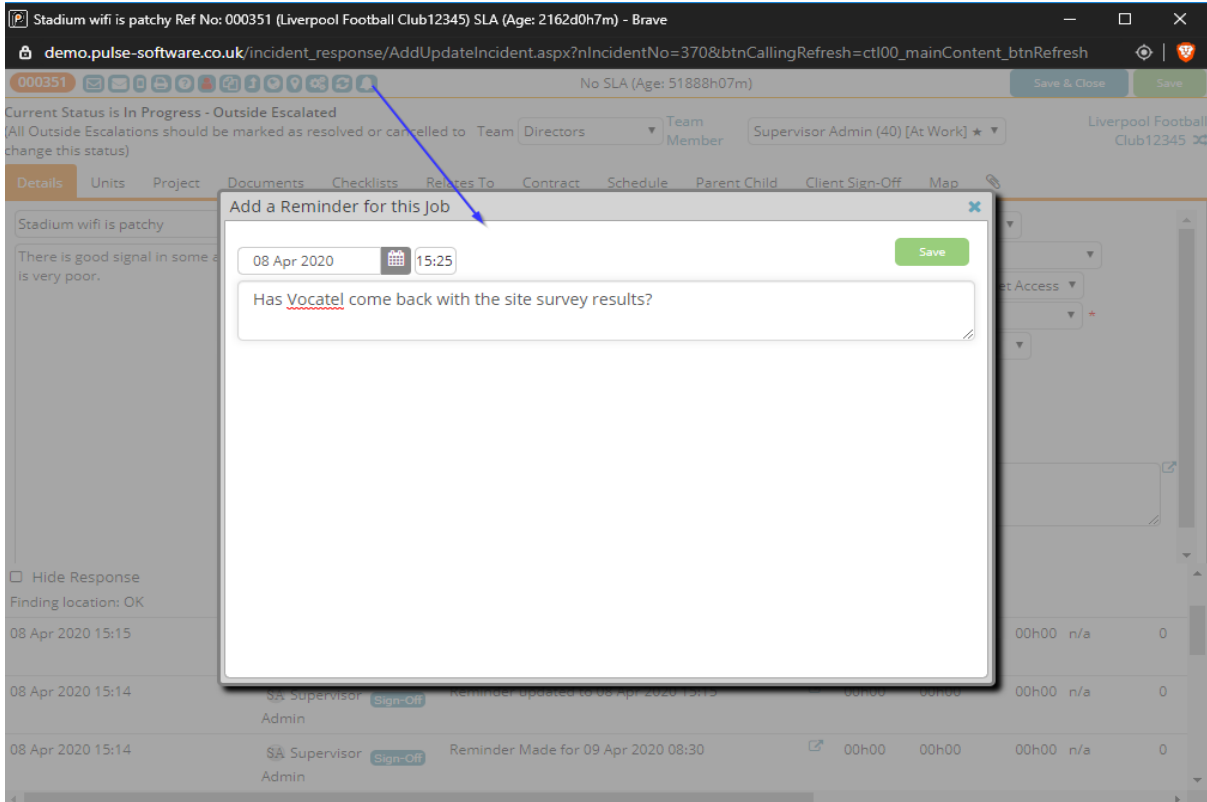Some Service Requests need to be dealt with immediately, while others can (or must) be left until a future date. Set a reminder on the Service Request to will receive a popup notification when the time comes around.

An Alternative Default Consultant on Clients

If you set the default consultant on a client, new Service Requests logged via email or your client portal will be assigned to that consultant. This raises the question - what if they are on leave, or off sick?

Pulse can now be configured to allow an alternative default to be set. If the primary default consultant is not available for assignment, then the alternative will be used instead.

Let us know if this functionality interests you, and we will activate it.

Set Custom Fields as Mandatory on Mobile Only

Sometimes a custom field is just mandatory. Perhaps you won't log a ticket without a serial number, since that's the service identifier. But perhaps, in your business, the serial number can only be known when the engineer travels to site and records it.

In both of these examples it is critically important to record, but in the latter it should only be mandatory for the engineer on his mobile device. This can now be set on the custom field set up interface.

⭐ **Checklists Now Available on Mobile**

Checklists are a great way to capture extensive extra data on the ticket. Your engineers can now do so directly on their mobile device.
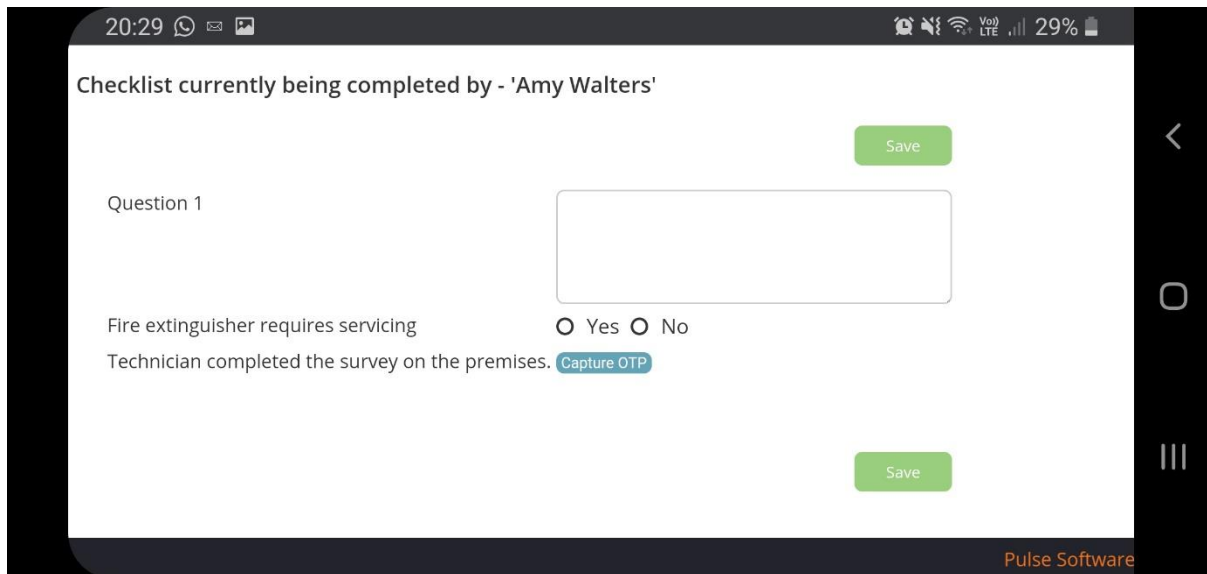
⭐ **Edit Event Times on Mobile**

If your engineers schedule their own site visits then the ability to change event times themselves is a useful addition. The ability to do so is driven by the event status, so if you need help setting this up just let us know and we will show you how.
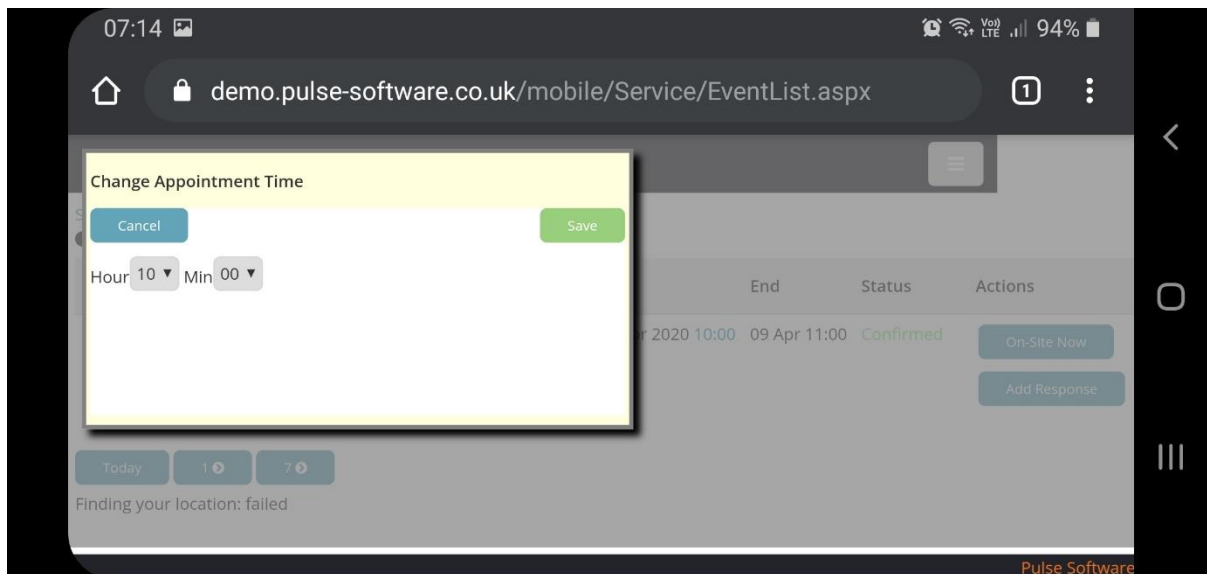
⭐ **A New Service Request Wizard**

We have a new Service Request logging wizard for you. The interface presents the minimum fields required, along with an attachment upload. The next step gives the option of adding a linked quote, or scheduling an appointment, or you can simply carry on with your next job.

Interested? Let us know.

⭐ **Suggested Assignment for Field Service**

Your technicians have certain skills. Your customers have certain needs. Pulse now helps you to allocate work to technicians with the relevant skills based on their availability, meaning that scheduling is faster, customers are updated more quickly, and technicians can make the most productive use their time.

If this powerful functionality is of use to you let us know and we'll help you to set it up.

⭐ **Next Business Day SLA's**

We have a new SLA for you – the work must be complete by the end of the next business day. If you are interested let us know and we'll show you how to set them up.

Force Capturing a Reporting Date on Service Request Logging

The default behaviour on logging a Service Request is to set the reporting date and time to the current date and time. If you would prefer to enforce capturing the reporting date and time let us know, and we'll configure it to start blank. The capturing staff member must then set it before creating the Service Request.

New Scheduling and Timesheet Interfaces

Our scheduling and timesheet interfaces were looking old fashioned, we know. In this release you will see fresh interfaces with modern responsiveness.

New Consultants Will Receive an Email with Instructions

Newly added Pulse consultants will now receive an email with instructions on how to access Pulse.

Inventory

⭐ **Add images to Catalogue Items and view them on associated Systems**

Catalogue items can now include images. These are then visible on the selector when making a quote or invoice and can be shown on the quote or invoice print out if required.
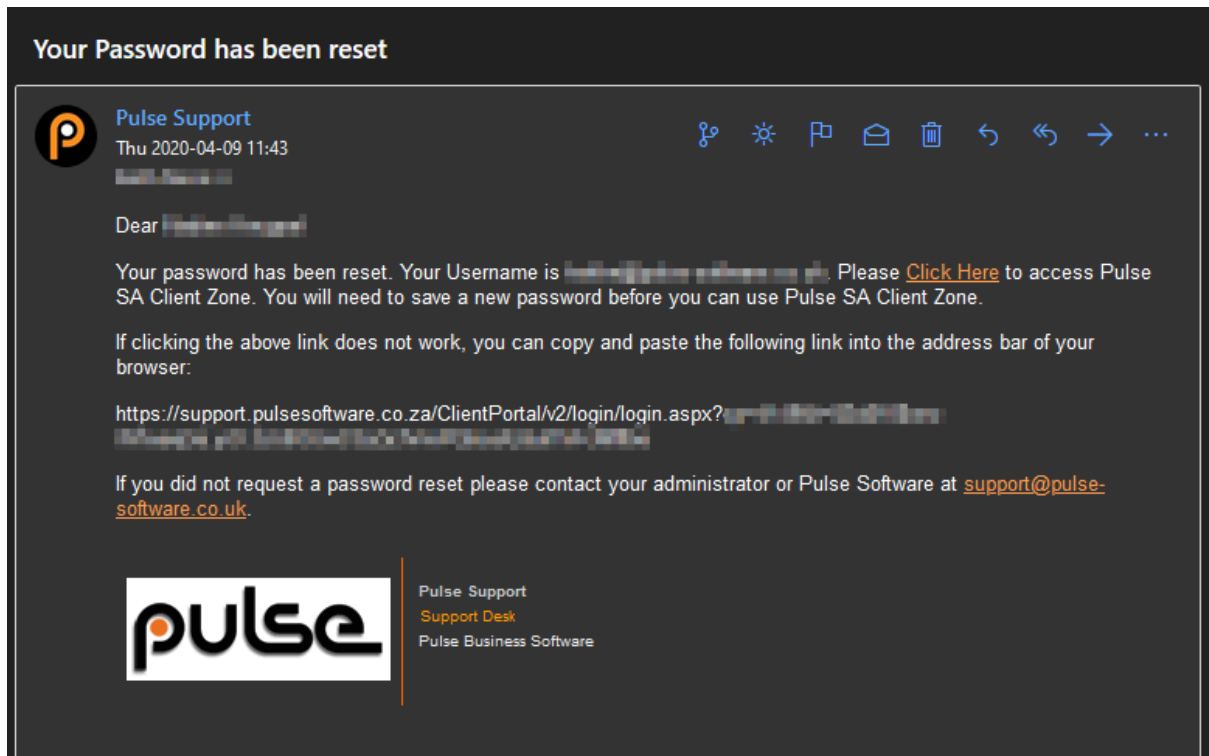
Client Portal

Client Portal Reset Emails Now Include Username
A small usability improvement for your client portal users - if they request a password reset the email now includes their username.

Core

General Improvements

We have improved the consistency of searches for clients across various documents. You may notice some usability improvements on the login and service request forms, and you should also see a general improvement in responsiveness of the application.

As always, we found some backend improvements to make.