




PULSE BUSINESS SOFTWARE









Cloud-based software that drives your business.

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

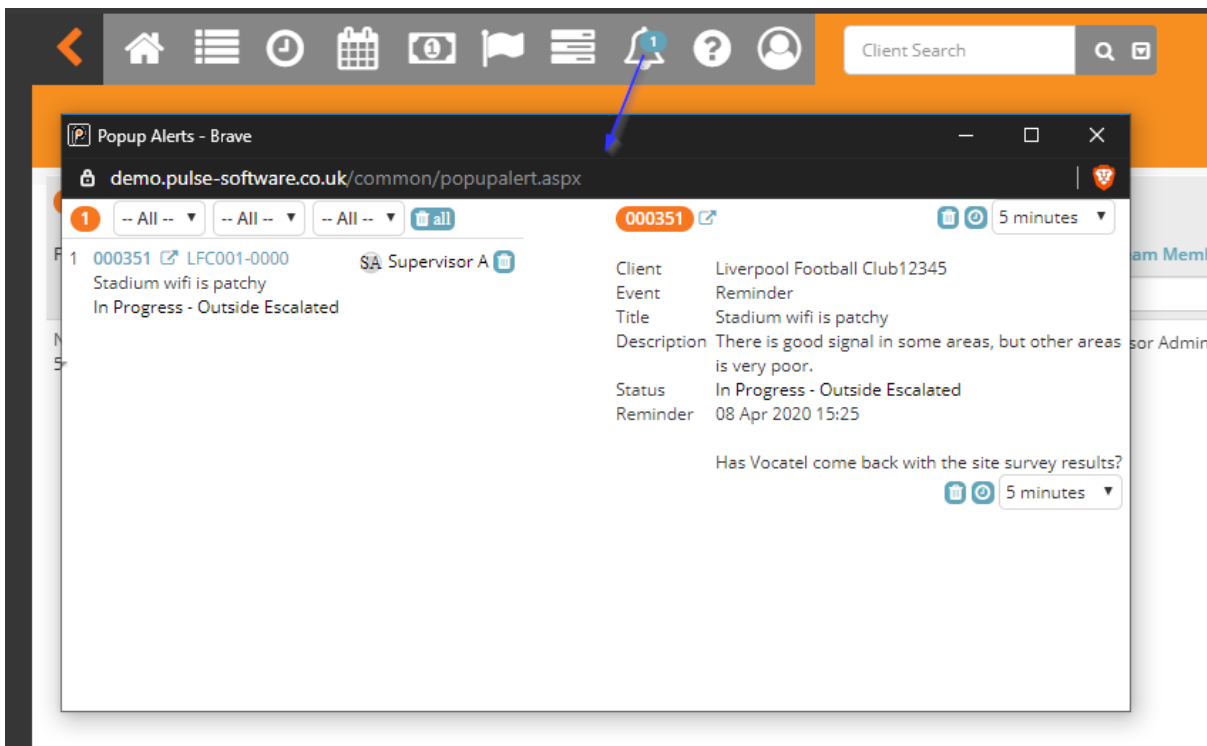
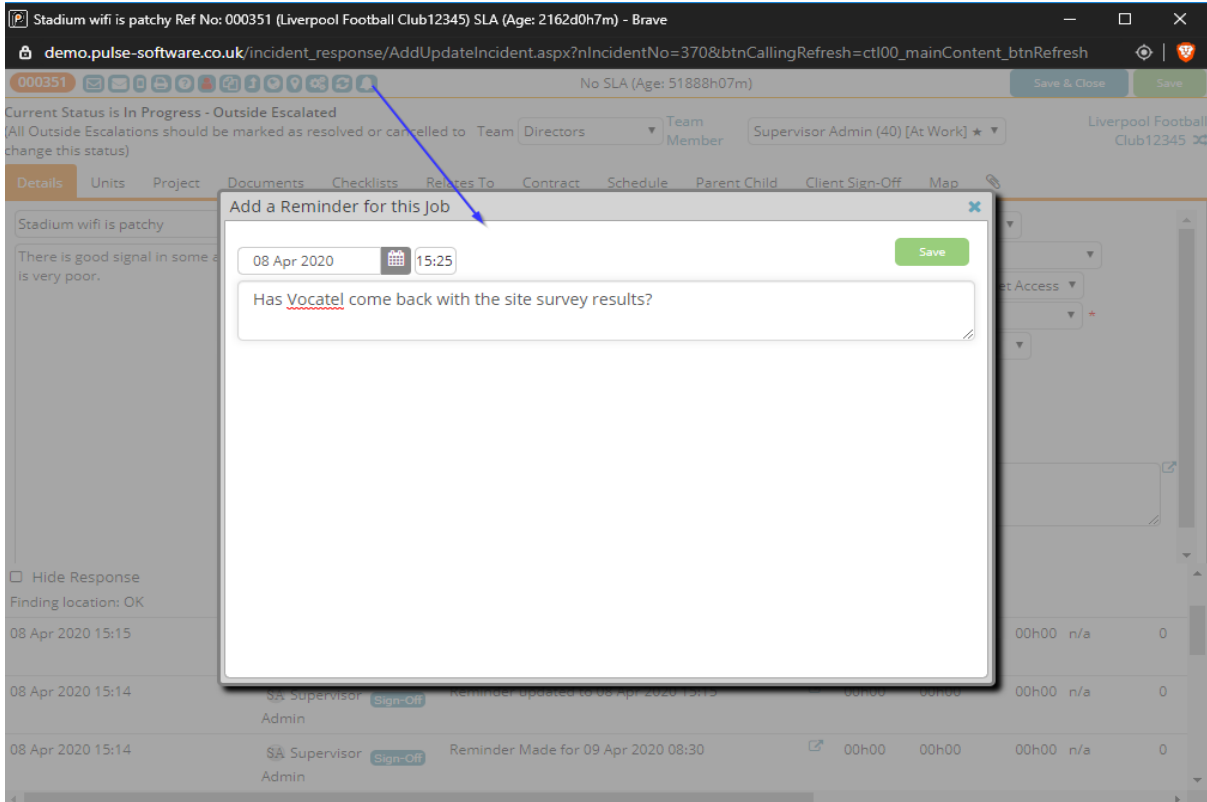
-  Add images to Catalogue Items and view them on associated Systems

Service



Set a Reminder on Service Requests

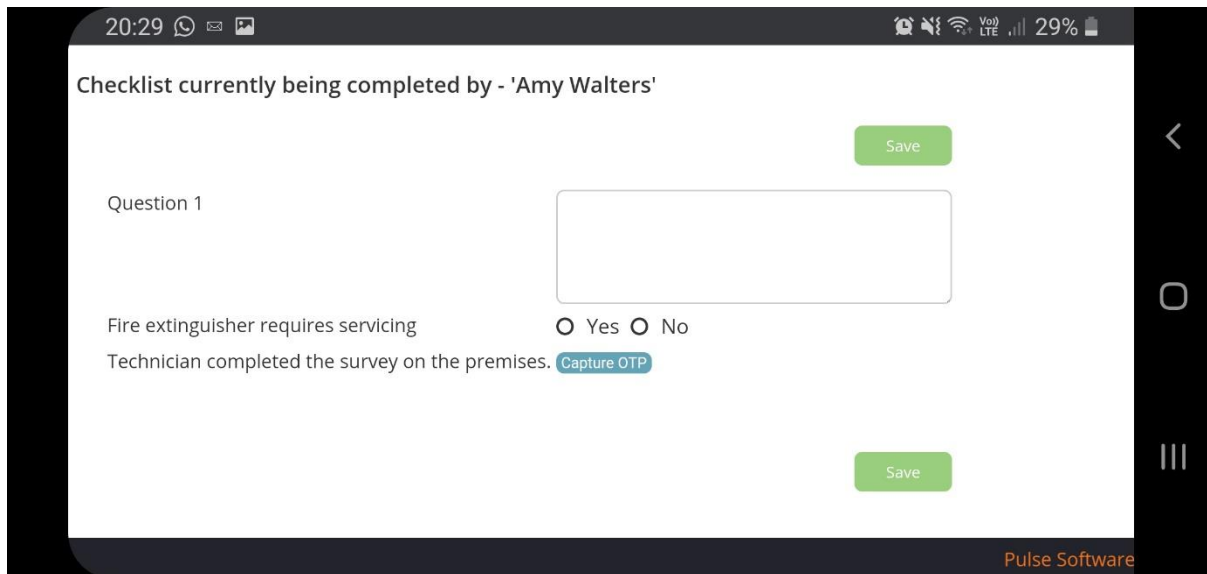
Some Service Requests need to be dealt with immediately, while others can (or must) be left until a future date. Set a reminder on the Service Request to will receive a popup notification when the time comes around.





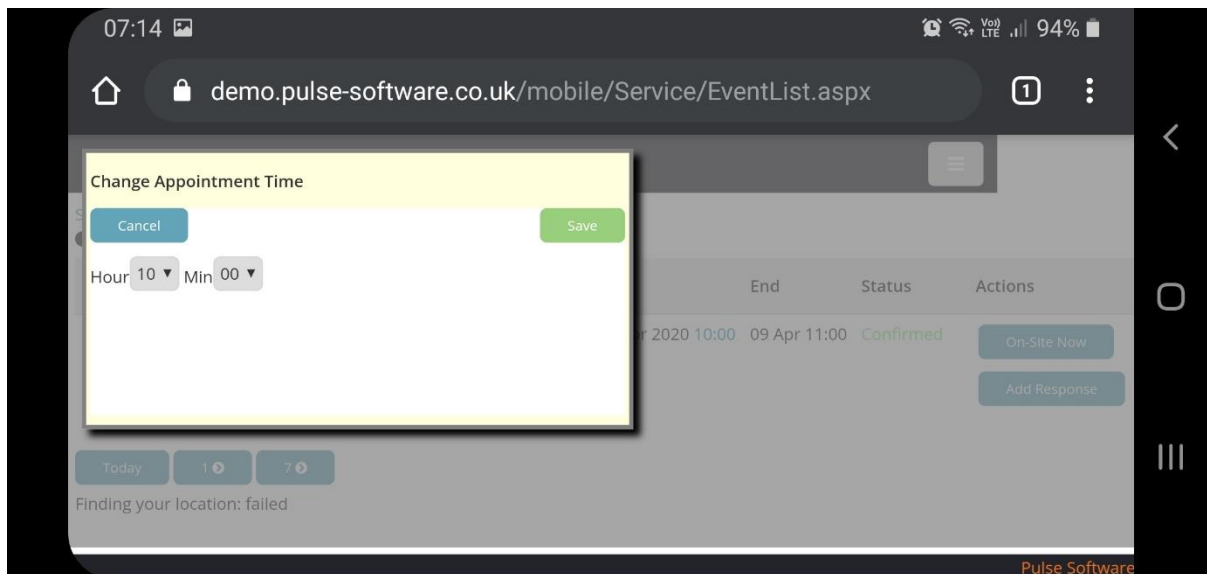
Checklists Now Available on Mobile

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.

Job Wizard - Brave

demo.pulse-software.co.uk/incident_response/AddIncidentWizard.aspx?mobnav=false&mobhead=false&nClientNo=1832&nCreateIncidentFromTe...

Job Description

Please visit the shop and check the speedpoint machine. Maria says that it is very unreliable.

Customer Reference

Network Speed (Mbps)

Notes

Category

Support

Call Type

-Not Set-

Service Type

-Not Set-

Severity

Priority 2

Failure Reason

-Not Set-

Assign To

Amy Walters

Attachment

Upload a file...

Next

Wizard - Brave

demo.pulse-software.co.uk/incident_response/AddIncidentWizard.aspx?mobnav=false&mobhead=false&nClientNo=1832&nCreateIncidentFromTe...

Job 000521 Logged

What would you like to do next?

Schedule this Job

Make a Quote



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.

The screenshot shows a web browser window with the URL `agbtest.pulse-software.co.uk/Incident_Response/AddUpdateIncident.aspx?mobnav=false&mobhead=false&nClientNo=6&nCreateIncidentFro...`. The page title is "Commercial Combined Survey Ref No: 000007 (Test ACME INSURANCE) SLA (Age:) - Brave". The interface includes a navigation bar with "Auto-Suggest Booking", "Assigned", "On Site", "Team", "Surveyors", "Consultant", and "Admin Admin (3)". A modal dialog box is open in the center, titled "A tentative Appointment has been made for this job". The dialog box contains the following information:

- Date: 14 Apr 2020
- Time: Tuesday - 09:00 to 01:00
- Who: Gary Duncombe
- Where: Test ACME INSURANCE
- Assign the Job to Gary Duncombe

Buttons for "Delete", "Edit", and "Confirm" are visible. The background interface shows a table with columns for "Date", "Who", "Description", "Act Hrs", "Km", and "Activity".

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.

		April 2020																			
		Thu, 9 Apr																			
		12am	1am	2am	3am	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm	6pm	7pm
	Amy Walters											Job ap									
	Bruce McCleod																				
	Charlie Chivers																				
	Finn MacDonald											Interface Meeting									
	Francis Smith																				
	Fred Holt												Install new								
	Helen O'Reilly																				
	Injozi Tech																				
	Jack Willets																				
	James Fargo																				
	Kate Martin																				

Consultant Start: 06 Apr 2020

Change View: [All Hours](#) | [Billable](#)
Time

Work Week Previous | Next |

	6 Apr 2020 2 hr 06 min	7 Apr 2020 4 hr 49 min	8 Apr 2020 4 hr 02 min	9 Apr 2020 0 hr 45 min	10 Apr 2020 0 hr 00 min
					10 April Good Friday 2020
7 ⁰⁰		ITEC PLC -UK Client- - Ref No: 135140 - 06:55 to 08:07			
8 ⁰⁰	Pulse SA - Ref No: 135639 - 08:13 to 09:11	Pulse SA - Ref No: 135732 - 08:07 to 08:09 Pulse SA - Ref No: 135707 - 08:26 to 08:50	Pulse SA - Ref No: 135760 - 08:45 to 08:54		
9 ⁰⁰			Pulse SA - Ref No: 135760 - 09:01 to 09:01 Morolo IT Pty Ltd		
10 ⁰⁰	Nextec Security And Building Technologies PTY LTD	Pulse SA - Ref No: 135721 - 10:10 to 11:04	AGB Risk Control Services Ltd - Ref No: 135304 - 10:00 to 11:00		
11 ⁰⁰					
12 ⁰⁰			Pulse SA - Ref No: 135707 - 12:59 to 12:59	Pulse SA - Ref No: 135124 -	
13 ⁰⁰		Pulse SA - Ref No: 135124 - 12:59 to 14:19			
14 ⁰⁰	Nextec Security And Building		Pulse SA - Ref No: 135760 - 14:00 to 14:00	Pulse SA - Ref No: 135124 -	

New Consultants Will Receive an Email with Instructions

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

Welcome, your Pulse Password can now be set > Inbox x



support@pulsesoftware.co.za via pulsebusinesssoftwareonline.onmicrosoft.com
to me ▾

Welcome Sarah Marshall

Before you can access your Pulse Installation, you will need to create a new password. Please [Click Here](#) to do so.

If clicking the above link does not work, you can copy and paste the following link into the address bar of your browser:

<https://support.pulsesoftware.co.za/Login/ChangePassword.aspx?>

If you received this in error then please contact your administrator or Pulse Software at support@pulse-software.co.uk.



Pulse Support
Support Desk
Pulse Business Software

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.


Quote Add Update - Brave
demo.pulse-software.co.uk/Quotes/AdvancedQuoteAddUpdate.aspx?display=UPDATE&nQuotePK=99&nClientNo=1832

Number 92 Delivery Date Document date 09 Apr 2020 Save

Please visit the shop and check

Lines Workflow Text

Line Catalogue Item Item

Line	Catalogue Item	Model	Price Excl VAT
1	CABLE	Cable-1 	£ 0.00
2			

Amount VAT Amount T

0.00 0.00

0.00 0.00

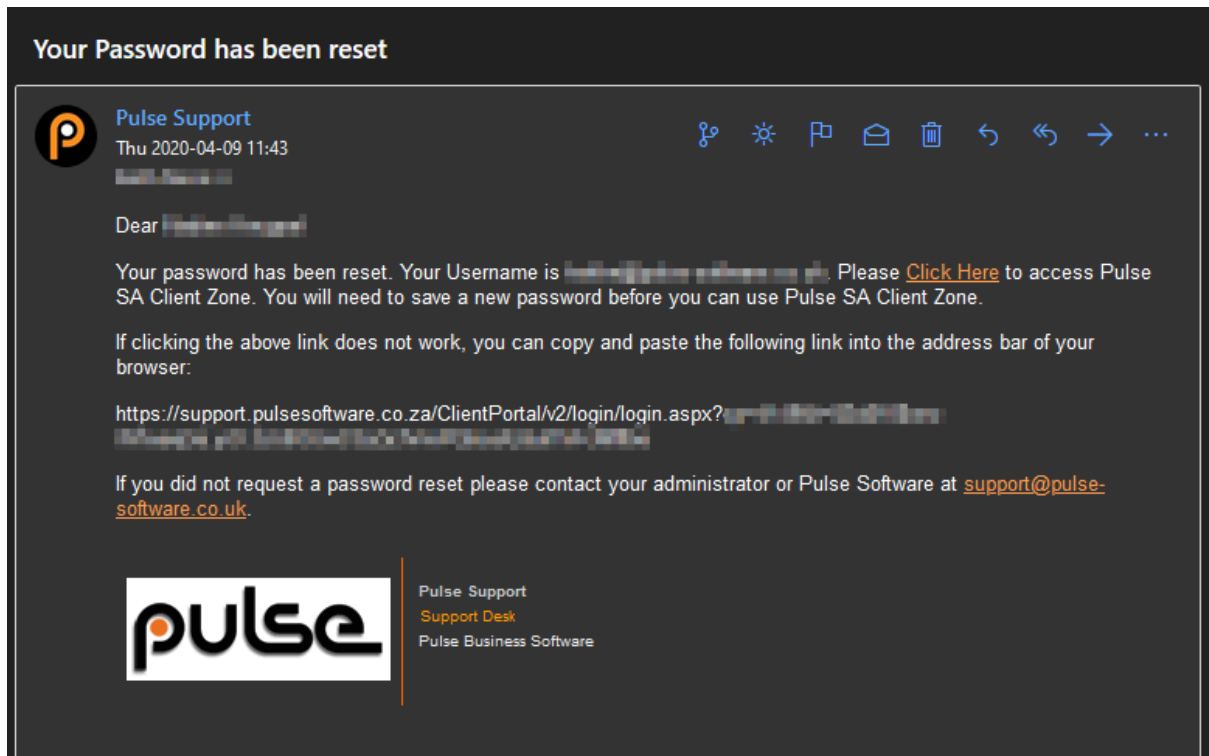
0.00 0.00

at 09 Apr 2020 08:27:14 Save

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.



The image shows a screenshot of an email interface. At the top, the subject line reads "Your Password has been reset". The sender is identified as "Pulse Support" with a timestamp of "Thu 2020-04-09 11:43". The email body contains the following text:

Dear [redacted]

Your password has been reset. Your Username is [redacted]. Please [Click Here](#) to access Pulse SA Client Zone. You will need to save a new password before you can use Pulse SA Client Zone.

If clicking the above link does not work, you can copy and paste the following link into the address bar of your browser:

<https://support.pulsesoftware.co.za/ClientPortal/v2/login/login.aspx?> [redacted]

If you did not request a password reset please contact your administrator or Pulse Software at support@pulse-software.co.uk.

At the bottom left is the Pulse logo. At the bottom right, the sender information is listed as "Pulse Support", "Support Desk", and "Pulse Business Software".

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.