







**PULSE BUSINESS SOFTWARE**

Cloud-based software that drives your business.

## Release Notes - Version Urchin Dev (June 2022)

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### Highlights

- Service**  Remove unanswered Ticket Survey(s)
- Service**  Opportunity Creation via Email
- Service**  Mobile QRCode scanning for Serialised Stock
- Service**  Map View - Show Locations

## Service

### ★ Remove unanswered Ticket Survey(s)

If the logged in user has sufficient clearance rights set, they will be allowed to remove unanswered Surveys from a Ticket

Survey Name	Cycle	Answers
Report ticket checklist	Report ticket checklist	✘ Support Tech 🗑️
Report Ticket Triage	Report Ticket Triage	✔ Zanele Mthembu   ✘ Support Tech 🗑️

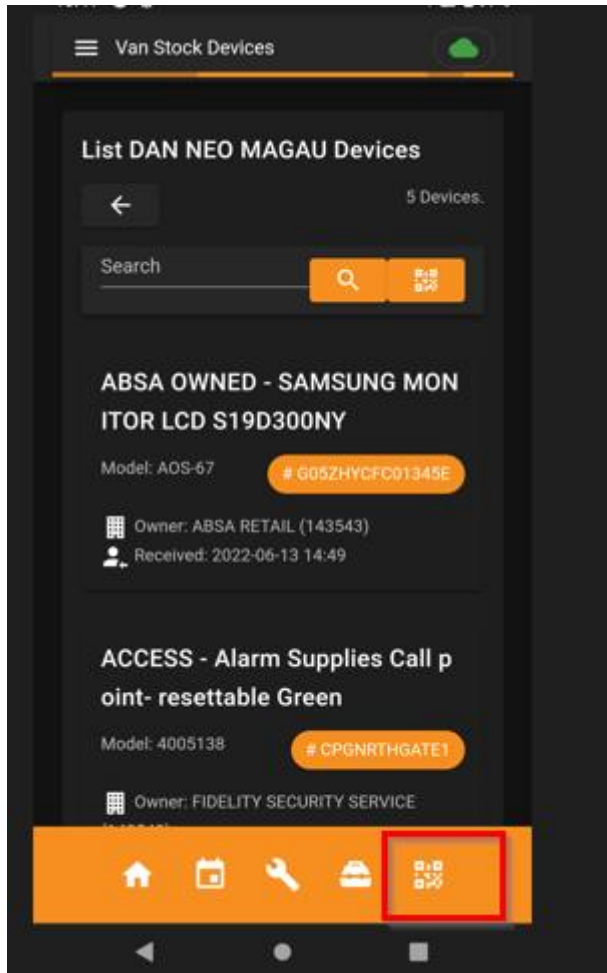
### ★ Opportunity Creation via Email

Once configured, Pulse can create opportunities from incoming emails, against Clients who are linked to Business Units defined for Sales.

Incoming Emails create a new Incident which is then processed into a new Opportunity for the Business Unit Client. Once processed, the Incident is set to the Opportunity Rule status.

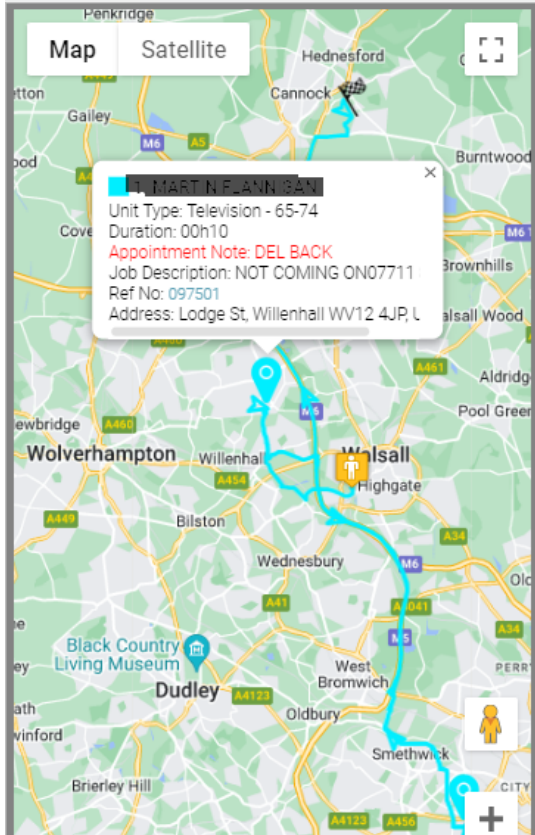
★ **Mobile QRCode scanning for Serialised Stock**

Mobile app now can scan QR Codes on serialised stock (assets).  
This makes it quick and accurate to record install or remove of these devices.



★ Map View - Show Locations

Enhancements to the Incident Map view to display (Distance within KM, Availability and Skill sets)



Save

Diary Date: 18 Oct 2022 📅 ⚠️

Department: Engineers ▼

Team Member: [Redacted] ▼ Show Appointments Optimize Route

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Consultant: [Redacted]

[Redacted] (2) Appointments (0) Slots Optimize Route

(2) Total Appointments

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Team Member Appointments

[Redacted] James Chisholm 👤

Client	Appointment	Consultant	Travel Distance	Travel Duration (est)	Travel ETA	Time Start	Duration	ETD	Ref	Unit Type
Starting from: Availability Post Code - WS2 9HQ										
1.	[Redacted] (WV12 4JP) <span>📍</span>	[Redacted] <span>▼</span>	4,0 mi	00h13	09h13	10:37	00h10	10h47	097501	Television - 65-74
2.	[Redacted] (B15 3ND) <span>📍</span>	[Redacted] <span>▼</span>	12,9 mi	00h30	11h17	13:54	00h10	14h04	098119	Television - 55-64
Ending at: Availability Post Code - WS11 7wb										
			36,0,9 mi	01h19	Total Time		01h03			

## Category value security settings apply to children

Setting the clearance level on a category value will now apply the clearance level to all children, grandchildren etc of that category value.

## Project Task linking on Purchase Order


Purchase Orders now can link to a Project Task

Site Details ▾ Sales ▾ Service ▾ Projects ▾ Inventory ▾ Site Financials ▾ **Supplier Financials ▾**

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**Purchase Order - /Testing Site**

Document Number

Document Date  








**Subject**

\*

**Workflow**

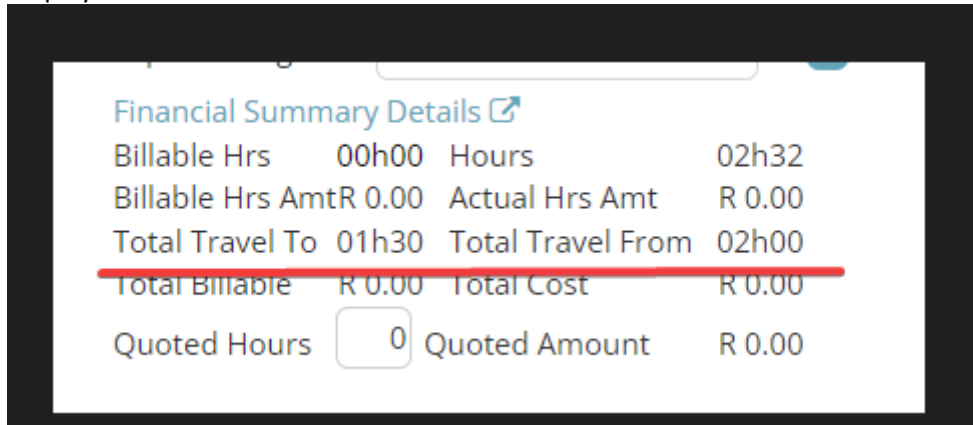
Assigned To  ▾

Financial **Relates To** Custom Fields Supplier Sender Delivery

Ticket	<input type="text" value="Click to link a Ticket"/>	 
Project	<input type="text" value="Click to link a Project"/>	 +
Project Task	<input type="text" value="--- N/A ---"/>	 
Customer Client	<input type="text" value="Search..."/>	
Client Contract	<input type="text" value="*Not Set*"/>	 +
Quote	<input type="text" value="N/A"/>	
Order No	<input type="text"/>	

## Incident Financial Summary Total Travel Hours

Display of the Total Travel From and To in HH:MM format on the Financial Summary section of the incident



The screenshot shows a mobile application interface for 'Financial Summary Details'. It contains a table with financial and travel information. A red horizontal line is drawn across the 'Total Billable' and 'Total Cost' rows. The 'Quoted Hours' field has a text input box containing the number '0'.

Financial Summary Details <a href="#">↗</a>			
Billable Hrs	00h00	Hours	02h32
Billable Hrs Amt	R 0.00	Actual Hrs Amt	R 0.00
Total Travel To	01h30	Total Travel From	02h00
Total Billable	R 0.00	Total Cost	R 0.00
Quoted Hours	<input type="text" value="0"/>	Quoted Amount	R 0.00

## Inventory

### If offsite with failure on mobile, mark all unuse

If there are "not finalised" ordered stock items on an appointment, the engineer can click Offsite with failure, Stock Parts Not Needed. All items that are not finalised will be marked as not needed.