



PULSE BUSINESS SOFTWARE





Cloud-based software that drives your business.

Release Notes – Version 19.03

Watershed Items

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


Service

-  Rethinking Merging
-  Satisfaction Surveys – Instant Alerts
-  Surveys and Checklists have New Question Types, Including File Uploads
-  Service Request Description Length Enhancements

Inventory

-  A New System Interface





Sales

-  Campaign Unsubscribe Enhancements

DIY Reports

-  Exciting DIY Reports Enhancements

Core

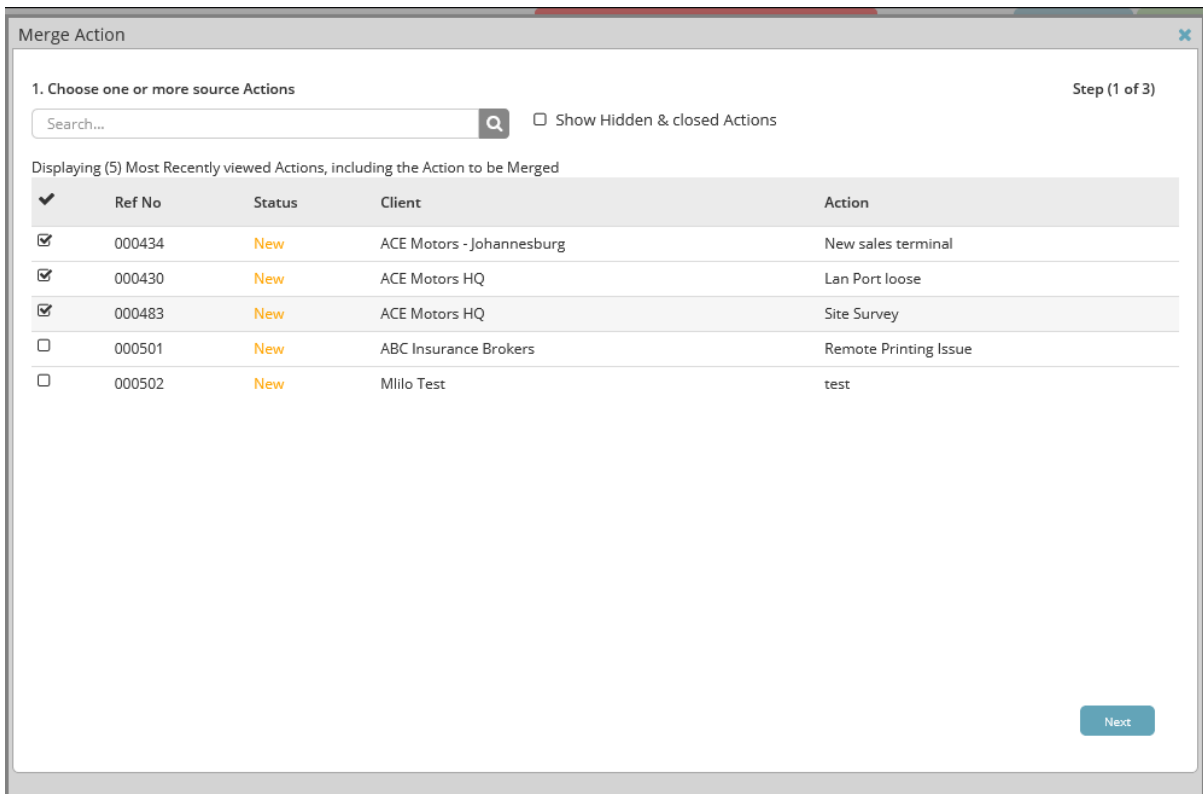
-  Left Tool Bar Notifications to Your Staff
-  Client Search Shows Recently Viewed at the Top
-  Access the Menu When the Left Tool Bar is Collapsed
-  Use the Main Pulse Application on Your Mobile Device

Service



Rethinking Merging

Whether due to human error or Reference Numbers not being included on emails, duplicate Service Requests are a part of any ticketing system. In the latest version we have made merging much more intuitive, and also made it easier to understand that a response was merged from another Service Request.





Satisfaction Surveys – Instant Alerts

Customer satisfaction surveys are a powerful way to get feedback after a Service Request is closed. It is now possible for survey answers to change the status of the Service Request, and this can then of course drive notifications. If your customer is unhappy you will now know immediately, giving you the chance to contact them quickly and salvage the situation.

A Contact Person from Pulse SA has Updated Incident 115571

Survey question 'How satisfied are you with the resolution of this Ticket?' answered 'Sad' and status set to Customer not happy

Original Description
Pulse Speed/Performance Issue

Further Information
Link to Service Request
Reference Number: 115571
Reporting user: Keith Norris
Experiencing User: Keith Norris
Assigned Staff member: Keith Norris
Company: Pulse SA
Assigned Team: Finance
Assigned Team leader: Keith Norris
EmailEvent Description: Pulse Speed/Performance Issue
Recipient Class Description: Pulse Speed/Performance Issue
Deadline: 12/06/2019

How did we do?

Ticket RefNo: 115571
Client: Pulse SA
Reported By: Keith Norris
Reported On: 16 May 2019 11:20:00

* How satisfied are you with the resolution of this Ticket?

😊 😐 😞

What could we do better next time?

It took too long to resolve.



Surveys and Checklists have New Question Types, Including File Uploads

Upload files, such as images or video, directly to the checklist. We have also added date, datetime, and statement types.



Service Request Description Length Enhancements

From now on, capturing a long Service Request description will attach the full text and make it available directly on the interface, in much the same way emails are available.

The screenshot displays a web application interface for managing service requests. The top navigation bar shows the request ID '000503' and the SLA target '16 May 2019 12:30:07'. The form includes fields for 'New', 'Team' (3rd Line), and 'Team Member' (Paula King (2) [At Work]). The 'Details' tab is active, showing the request title 'Network Outage', reporting date '16 May 2019' at '11:37:00', and reporting user 'Samantha Marx'. A red star icon next to the description field indicates a long description. Below the main form, a 'View Original Description' window is open, displaying the full text of the request description, including network logs for Ethernet and Wireless LAN adapters.

Network Outage Ref No: 000503 (ACE Motors Birmingham) SLA (Age: 0d0h8m) - Firefox Nightly

https://1903test.pulsesoftware.co.za/Incident_Response/AddUpdateIncident.aspx?nClientNo=103&nC

000503 In SLA [Time to First Responded] Target: 16 May 2019 12:30:07 (Ge

New Team 3rd Line Team Member Paula King (2) [At Work]

Details Units Project Checklists Relates To Contract Schedule Client Sign-Off Map (1)

Network Outage Reporting Date 16 May 2019 11:37:00 Category

Please urgently check our network. The logfile data I have accessed is below. Deadline 00:00 Call Type

Reporting User Samantha Marx Service Type

Network Outage Ref No: 000503 (ACE Motors Birmingham) SLA (Age: 0d0h8m) - Firefox Nightly

https://1903test.pulsesoftware.co.za/Incident_Response/AddUpdateIncident.aspx?nClientNo=103&nCreateIncidentFromTempl 4

View Original Description

Please urgently check our network. The logfile data I have accessed is below.

Ethernet adapter Ethernet:

Media State : Media disconnected
Connection-specific DNS Suffix . :

Wireless LAN adapter Local Area Connection* 2:

Media State : Media disconnected
Connection-specific DNS Suffix . :

Wireless LAN adapter Local Area Connection* 12:

Media State : Media disconnected
Connection-specific DNS Suffix . :

Wireless LAN adapter Wi-Fi:

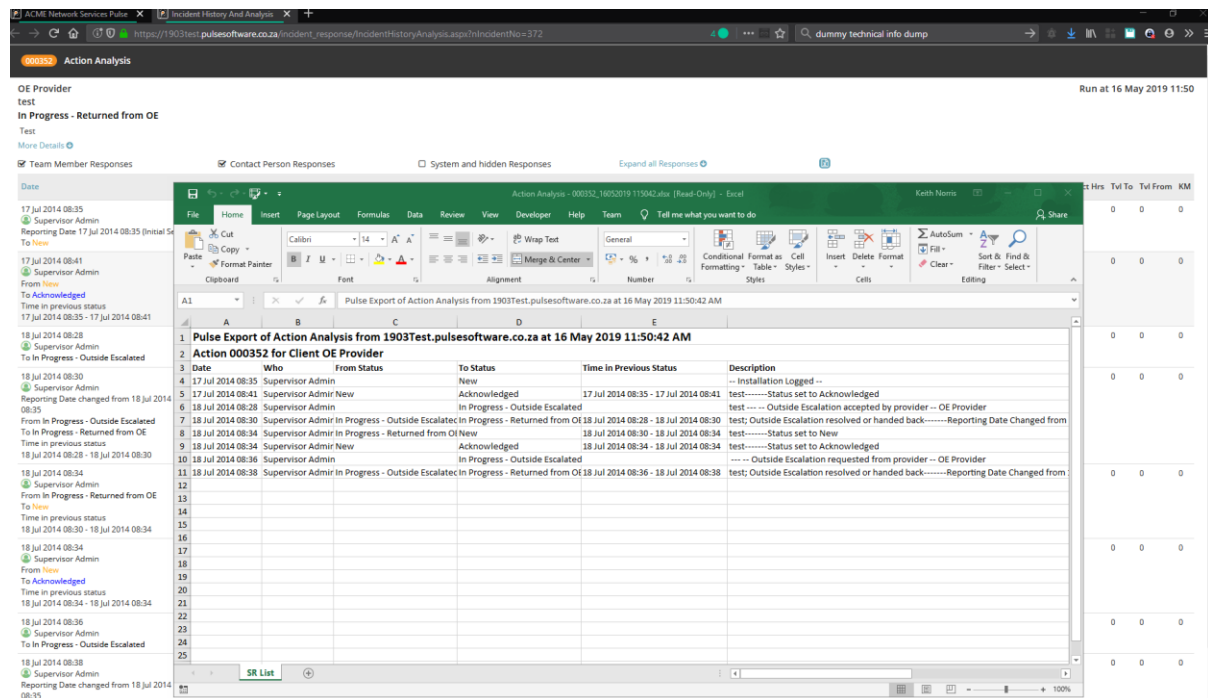
Connection-specific DNS Suffix . :
Link-local IPv6 Address : fe80::45e1:9570:8895:9b3f%8
IPv4 Address. : 196.182.57.13
Subnet Mask : 255.255.255.0
Default Gateway : 196.188.57.1

Ethernet adapter Ethernet 2:

Connection-specific DNS Suffix . :
Link-local IPv6 Address : fe80::5e7b:56d9:d9bd:cb27%11
IPv4 Address. : 10.12.100.10
Subnet Mask : 255.255.255.252
Default Gateway :

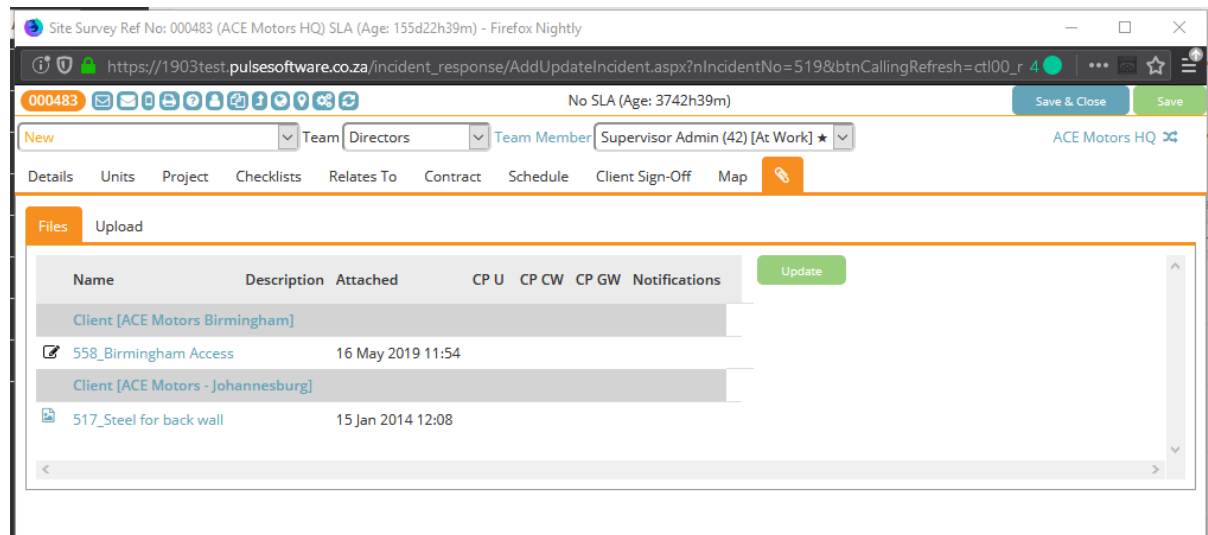
Export History and Analysis

This has been a long-standing request, and we are pleased to release the ability to export the History and Analysis page.



Service Request Attachments Can Now Include Child Client Attachments

Client attachments can be marked to be available on the Service Request. We have now extended this to include attachments on child clients.



Contract Column on SRList

The SRList can now include a contract column.

Response Type Determines Approval


If you use response approvals, you may be interested in this new feature. Response types can automatically mark a response as approved. Please contact us if you'd like this set up.













Financials

PDF Invoice Export

Open any invoice directly as a pdf, without having to jump through any extra hoops to download and convert it.

Client Financials ▾ Supplier Financials ▾

Search  [Add New](#)

	Amount	Assigned To	Status	Approved	Posted	Sent	Fully Allocated	Outstanding	CR Note	Invoice Printed	
ay 2019	R 311.42	 Tahiti van Rooyen	✓	✓	✓	✓	✗	R 311.42	✓	  	
ir 2019	R 311.42	 Tahiti van Rooyen	✓	✓	✓	✓	✓	R 0.00	✓	  	
ar 2019	R 311.42	 Tahiti van Rooyen	✓	✓	✓	✓	✓	R 0.00	✓	  	

Inventory



A New System Interface

The system interface is one of the last to get upgraded to the (no longer) new document layout. We believe you will enjoy the new layout and find it easier to use.

ACE Motors HQ - SC 100 / **Unit** (Inventory / Unit)

Client Details ▾ Sales ▾ Service ▾ Projects ▾ **Inventory ▾** Client Financials ▾

Catalogue Item **ECO 50 Franking Machine Bundle** Save
Unit Name Model Number
Serial Number
Unit Description

Active Hidden

Details **Unit Contracts** Settings Descriptors Actions History Checklists

Type	Contract	Covered From	Covered To	Min Months	Priced By	Billing Frequency	Support Value	Note
<input checked="" type="radio"/> Customer	<input type="text" value="-Please Select-"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text" value="Monthly"/>	<input type="text" value="Setup"/>	<input type="text" value="0.00"/>	<input type="text"/>
<input type="radio"/> Supplier						<input type="checkbox"/> Show on Invoice		
<input checked="" type="radio"/> Customer	Service Contract - (00009)	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text" value="Monthly"/>	<input type="text" value="Quarterly"/>	<input type="text" value="45.00"/>	<input type="text"/>
<input type="radio"/> Supplier								<input type="text"/>

Created by - 'Supervisor Admin' at 28 Jun 2017

Service Request Ref No Available on Stock Listings

Consultant and client stock listings will now show the last linked Service Request Ref No, if any.

Sales



Campaign Unsubscribe Enhancements

Marketing emails should include the ability to unsubscribe, and Pulse has always insisted on the inclusion of an unsubscribe link. However, the campaigns tool is also useful for non-marketing related communications – for example, a mass mail updating all customers of a technical issue. It is now possible to exclude the unsubscribe link from these sort of campaign emails, and send to all recipients.

Campaign - Network Maintenance Planned

Details HTML Editor Images Opportunity Recipients

Campaign Name *

Follows Campaign ▾

Assigned Consultant ▾

Start Time *

Email Subject Line *

Send From Email Address *

Marketing Technical Update

Email Source File

Use Template File

Upload File

Make New File

Prepare to send

Approved

Sent Not Sent

DIY Reports



Exciting DIY Reports Enhancements

We have extended DIY reports to improve the layout, allow for exporting and importing reports, and overall improved rendering. For example, phone numbers are automatically displayed correctly, consultant avatars are natively supported, and various rich text formatting is available.

Service Requests Tickets Requiring Customer Contact 📄

Ref no	Client	Status	Assigned	Contact	Phone
000503	ACE Motors Birmingham	New	Paula King	Samantha Marx	
000502	Miilo Test	New	Supervisor Admin	Miilo Contact	
000501	ABC Insurance Brokers	New	Jack Willets	ContactPersonFirstname1808 ContactPersonSurname1808	
000500	Miilo Test	New	Supervisor Admin	Miilo Contact	
000499	Miilo Test	In Progress - Assigned	Supervisor Admin	Miilo Contact	
000498	VetSmart	New	Finn MacDonald	Nelson Jones	07717194712
000497	ACE Motors - Johannesburg	Acknowledged	Amy Walters	Jennifer King	010 500 8469
000496	ACE Motors - Johannesburg	Provisionally Resolved	Amy Walters	Jennifer King	010 500 8469

Core



Left Tool Bar Notifications to Your Staff

Do you need to communicate with your staff? We have introduced a notification area to do so. You can limit it to only show to certain team members, and if there is more than one active notification they will revolve. They also expire if set to do so.

The screenshot shows a software interface with a notification panel on the left and a data table on the right. The notification panel, titled "Notifications", displays a message about "Slow Internet" and a "Status Scoreboard" with various categories and counts. The data table on the right has columns for "FireBar", "Ref No", "Reporting Date", and "Client".

FireBar	Ref No	Reporting Date	Client
No SLA (Age: 9942h02m)	000440	30 Aug 2017 07:18	Golden
Stopped Overdue [Time to Close] Target: 19 Jul 2017 14:52:00 (General SLA)	000436	11 Jul 2017 14:51	ACE Mc
	000428	29 Jun 2017 14:13	ACE Mc



Client Search Shows Recently Viewed at the Top

Recently viewed clients will show first in the list if they are returned by your search.

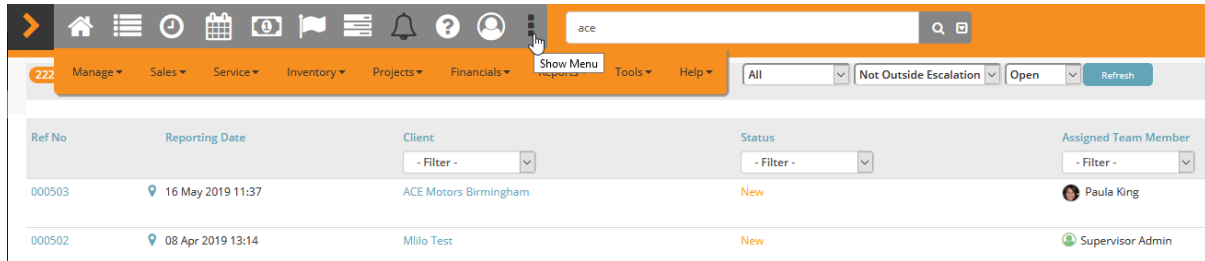
The screenshot shows a client search interface with a search bar containing "ace". A dropdown list of results is displayed, with "ACE Motors - Johannesburg" highlighted by a mouse cursor. The list includes various ACE Motors locations.

Client Name
Ace Motors - Brighton
ACE Motors - Johannesburg
ACE Motors Airport
ACE Motors Birmingham
ACE Motors Cardiff
ACE Motors London
ACE Motors HQ
ACE Motors Dublin
ACE Motors Edinburgh
ACE Motors Kilkenny
ACE Motors Manchester
ACE Motors Swindon



Access the Menu When the Left Tool Bar is Collapsed

Collapsing the left tool bar frees up valuable real estate, but until now you could not access the menu while it is collapsed. A new icon allows you to view and use the menu at all times.



Use the Main Pulse Application on Your Mobile Device

The full Pulse application now works on all mobile devices. We recommend larger screens though.

General Improvements

Finally, look out for small navigation improvements to help you get around. Our instruction balloons should help point the way.

And, as always, a collection of security and automation enhancements are working quietly in the background to make Pulse faster, better and more secure without you necessarily noticing.