Release Notes – Version 20.04

Watershed Items

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

Service

- ⭐ A brand-new mobile service application that works offline
- ⭐ Category and Custom Field Ordering Enhancements on the Service Request
- ⭐ SLA Override
- ⭐ Schedule appointments based on consultant skills, and let Pulse suggest a route to their appointment(s) for the day

Core

- ⭐ Reorder dashlets on the left tool bar, and we have new ones for you to try

Service

⭐ **A brand-new Mobile Service Application That Works Offline**.
We are very excited to introduce the new Pulse mobile app. We have leveraged the best of modern browser technology to deliver a fast, responsive and offline-capable application.

Click here to view a short introductory video that showcases ther best of the new mobile application: https://www.youtube.com/watch?v=yhyiTTiqx-Q

⭐ **Category and Custom Field Ordering Enhancements on the Service Request**
Have you ever wished that the Service Request could mix text boxes and dropdowns in any order? How about putting the description after a dropdown? With this release you can do exactly that.

The customer details can also be top left for instant information.

SLA Override

Service Level Agreements are powerful real-time drivers of customer service. Being real-time has a down-side though – if you miss updating the Service Request (perhaps because you are doing the work required) you can't go back and change whether you missed or met the SLA.

SLA Overrides are security-level-controlled functionality that allow you to reset whether the SLA was met or not. The original SLA data is retained, and a reason must be given to override it.

Since SLA's can be contractually important, this functionality is off by default. Let us know if you'd like to discuss how you can use it in your operations.

SLA Status	Started	Target	Stopped	Firebar	Type	Stops When	Paused	Mins	Mins Left	24/7	NBD	
Historical												
✔	23 Sep 2020 11:08	23 Sep 2020 14:08	23 Sep 2020 13:14		Time to First Responded	Responded to Customer	✖	180	54	✖	✖	🖉
✖	23 Sep 2020 11:08	01 Oct 2020 08:38	01 Oct 2020 08:40		Time to Tentatively complete	Resolved - Awaiting Approval	✖	2400	0	✖	✖	🖉

SLA Override   ✕

                                                                              Save

Started   [23 Sep 2020] 📅 [11:08]   Stopped   [01 Oct 2020] 📅 [08:40]

Target   [01 Oct 2020] 📅 [08:38]   ☐ In SLA

Reason

Schedule Appointments Based on Consultant Skills, and Let Pulse Suggest a Route To Their Appointment(s) for the Day

One of the challenges with field service is that you have specialist staff in particular geographic locations. In order to schedule their day it is not enough to know which of your field technicians is qualified for the work – you also need to assign it to someone close by.

Pulse's new route planning functionality encompasses both these aspects and will even plan the most efficient route between multiple appointments on a given day.

Click here for a video demonstration: https://www.youtube.com/watch?v=TkYXRSdigdM

Use Checklist Questions to Generate a Maintenance Contract and Cyclic Template Service Request

Our checklist / survey engine can now generate contracts and Service Request templates. Why is this useful? A checklist generated from a Service Request can ask a few simple questions (or example, "How often should the equipment be serviced?") and thereby generate a contract and cyclic Service Request. This requires some setup so if you are interested then let us know.

Make Email and Text Message Reminders Off a Service Request

Following on from a previous update you can now set a ticket to email or text you at a given time.

Designate the Assigned Consultant for a Template Service Request

Template Service Requests allow you to pre-configure common categories, custom fields and descriptions for Service Requests to be generated in your call centre or on a timed cycle. You can now designate the team and consultant for assignment.

Financials

Supplier Journal Listing Shows Allocation

In the past it was necessary to open a supplier journal to view the allocations. This is now visible on the listing page.

Inventory

Add Images to Catalogue Items

Catalogue items can now have images uploaded. These will then show on selection pages (for example on a quote), making it easier to find the item you are looking for.
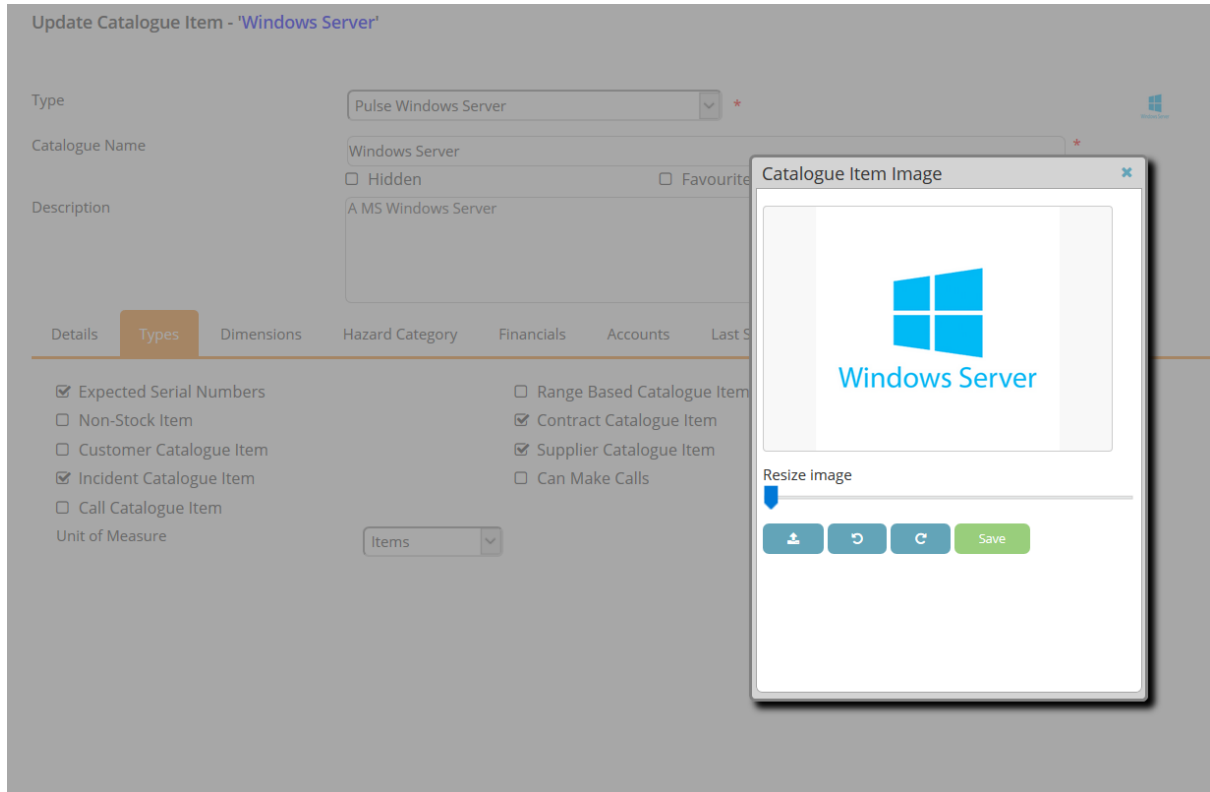
Core

Reorder dashlets on the left tool bar, and we have new ones for you to try

This is a feature our own staff have wanted for a long time, and we are now excited to give it to you.

The left-toolbar dashlets can now be re-ordered, and there are also new ones for you to have a look at.

Menu items can now include icons

Power users can now add icons to menu items to make it easier to find what you are looking for.

General Improvements

We have worked hard to reduce the number of times Pulse asks the server for script and image resources. The result is a faster, leaner Pulse.