








PULSE BUSINESS SOFTWARE

Cloud-based software that drives your business.

Release Notes – Pulse Version 21.02

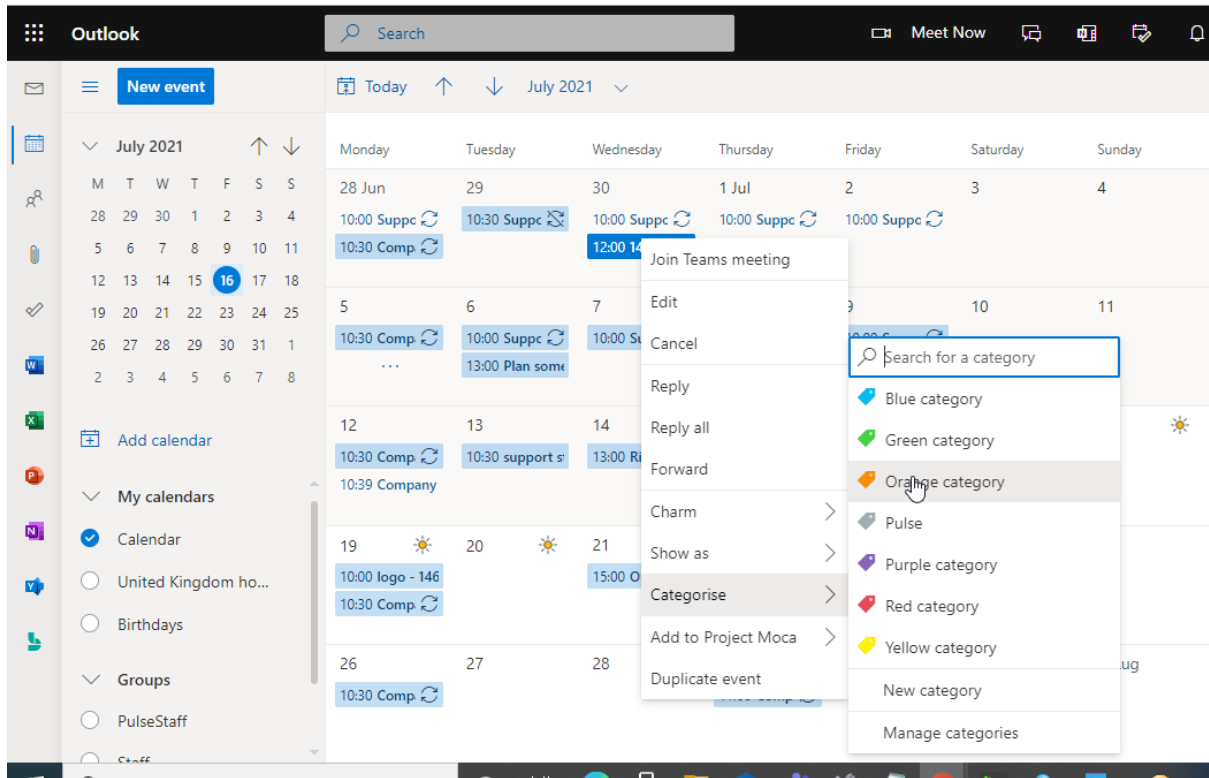
Highlights

- Service**  Exchange Calendar Events Made by Pulse Categorised and Coloured
- Client Portal**  Client Portal Help Available Text On All Fields
- DIY Reports**  New Map View in DIY Reports
- DIY Reports**  Better Alignment of DIY Report Filters
- Core**  A New Drag and Drop Interface for Team Membership

Service

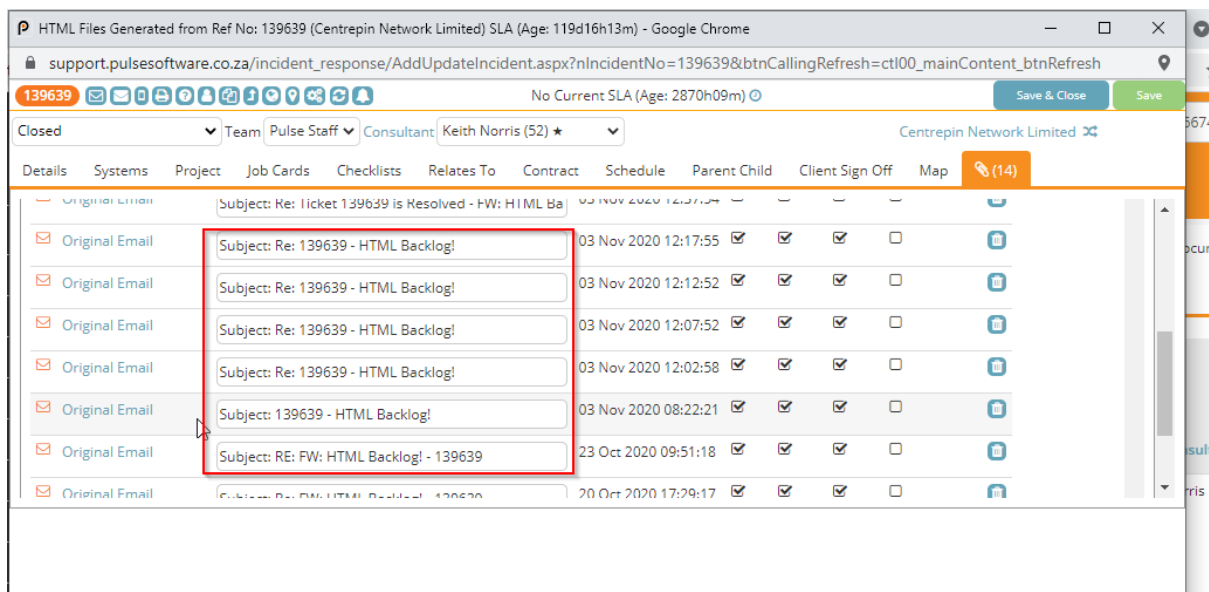
★ Exchange Calendar Events Made by Pulse Categorised and Coloured

Appointments that were created from the pulse interface have a specific colour which defaults to "steel". This makes it easier to identify appointments created from pulse.



HTML Files Generated from Emails Hidden by Default

HTML files that were previously included in attachments are now hidden by default.



Hiding of System Audit Text on Responses

Text highlighted in yellow was put by a consultant. Text highlighted in green was put by a system. You are now able to hide responses that were made by a system. If required please let us know.

The screenshot shows a ticket management interface for a ticket titled "Pulse SA - Issue with deselecting trx on a locked". The interface includes a navigation bar with tabs like "Details", "Systems", "Project", etc. The main content area is split into a message view on the left and a metadata/summary view on the right. The message view shows an email response from Funeka Makalima. Below the message, a list of responses is displayed. The first response is highlighted in yellow and is from Funeka Makalima, dated 08 Jul 2021 12:59:00. The second response is highlighted in green and is a system-generated message, dated 08 Jul 2021 12:52:01. The system message text is: "----- Assigned Consultant set to Support Tech; Status set to Assigned; Ticket Type set to Fault; Sub-type set to 3 - Minor".

Setting to Allow Searching of Catalogue Items on Service Requests

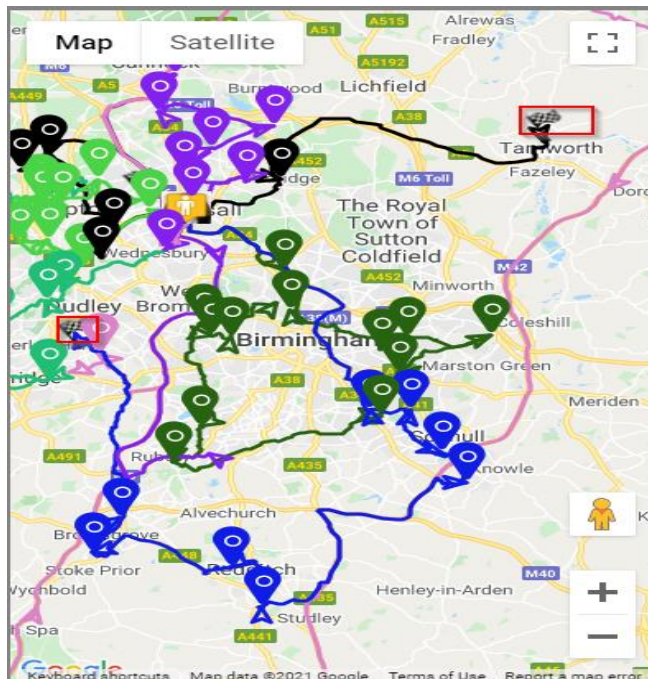
It is now possible only allow selected Catalogue Items to be found on searches on the client portal.

The screenshot shows a service request form with the following fields:

- Reported Fault:
- Description of Job:
- Product (Model No. EAN etc):
- Product (Model No. EAN etc):
- Purchase Date:
- Serial No.:
- Store Colleague Name:
- Store Colleague Position:
- Order Number:
- Accessories:

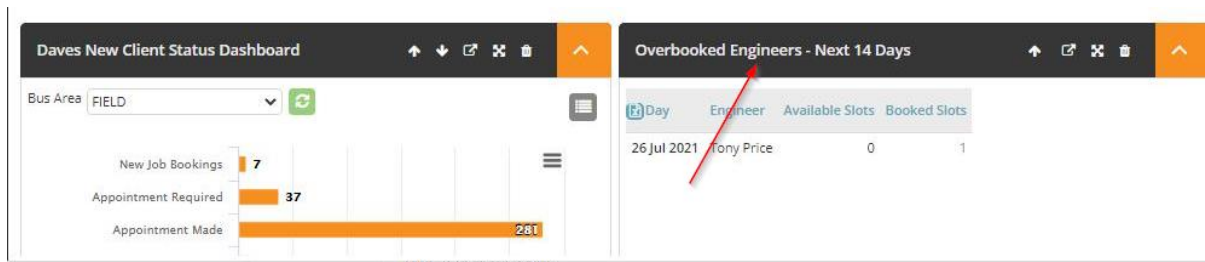
Engineer Availability - Awareness of Who is Near the Job on the Day

You can now see which consultants are close to the customer on a map to help with scheduling.



Engineer Availability Over Booking

Now there is a dashboard showing current overbookings (if any). This can be pinned on the consultant's front page.



An e-mail notification to a manager if there are any overbookings, referring him to the dashboard. (This can be done on request)

★ Inventory

EAN code is now searchable.

Catalogue Item Maintenance Add New Catalogue Item

Search by Type:

Search by Make:

Search by Name:

Search by Model:

Search by EAN Code:

Serialised: All Serialised Non-Serialised

Show Hidden:

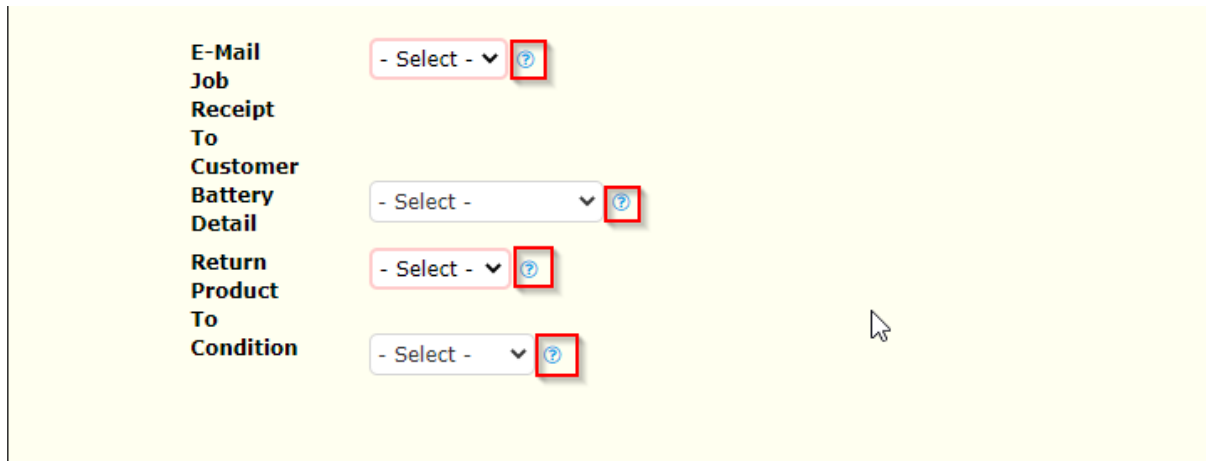
[Show UnPaged View](#)

| Catalogue Type | Catalogue Item Name | Make | Model Number | EAN Code | Serialised | Favourite | Cost Price | Sales Price |
|--------------------|--------------------------|------|--------------|----------|----------------|-----------|------------|-------------|
| Tumble Dryers Part | DOOR NTC | BEKO | 2971900100 | | Non-Serialised | No | £ 0.00 | £ 0.00 |

Client Portal

★ Client Portal Help Text Available On All Fields

When a note is captured, then a ? is displayed next to the Relevant element.



The screenshot shows a form with four dropdown menus. Each dropdown menu is labeled with a field name and contains the text '- Select -' followed by a downward arrow and a help icon (a question mark inside a circle). The help icons are highlighted with red boxes. The field names are: 'E-Mail Job Receipt To Customer Battery Detail', 'Return Product To Condition', and two others that are partially obscured. A mouse cursor is visible on the right side of the form.

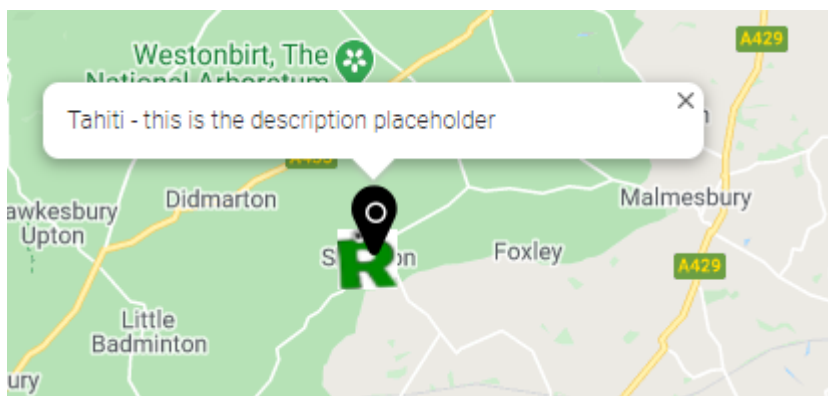
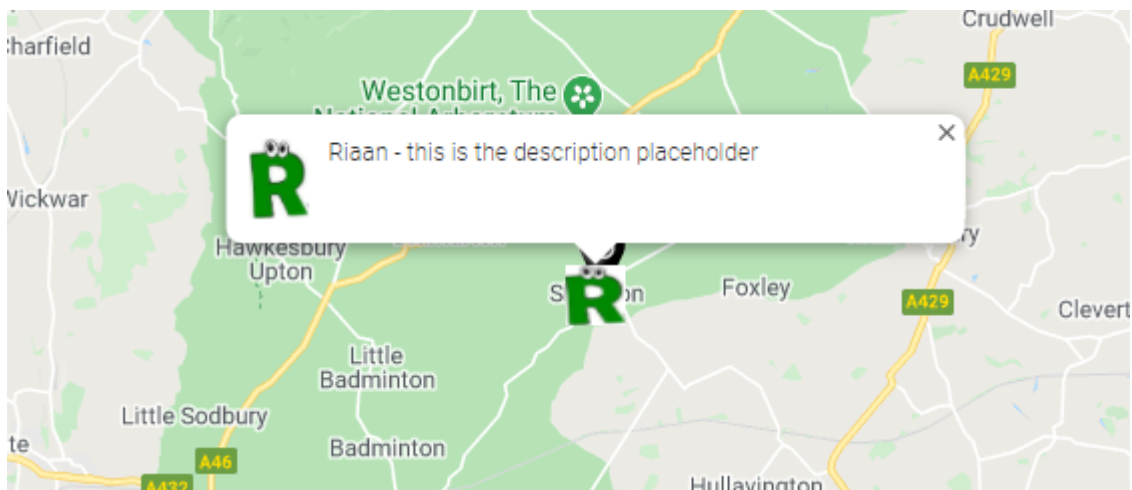
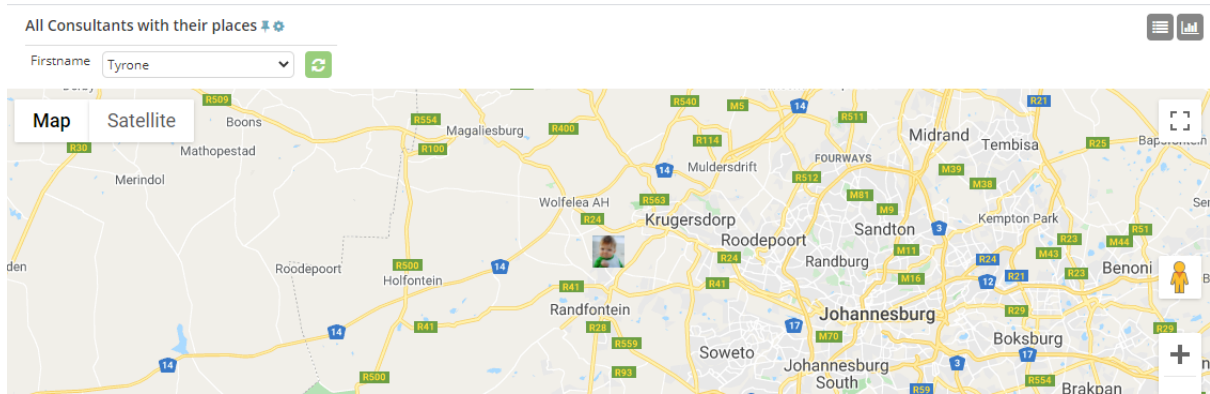
Ability to Hide the Client Search in the Client Portal

Client search option can now be hidden in the client portal.

DIYReports

★ New Map View in DIY Reports

Extent DIY Reports, to result in Google Maps as pins from co-ordinates.



Layout Improvements

Filters are now horizontally aligned, and column data can be formatted to not wrap.

support.pulsesoftware.co.za/reportSQL/DIYReportList.aspx

Show Report View

Name: Account Manager Report

Description: Combined between PulseSA and PulseUK

Filters:

Start Date: 01 Aug 2021 00:00

End Date: 31 Aug 2021 23:59

Account Manager: *All*

Refresh View

Add/Remove Columns
 Replace Yes/No True/False with Icons
 Apply Paging
 Generate as Chart
 Generate as Map

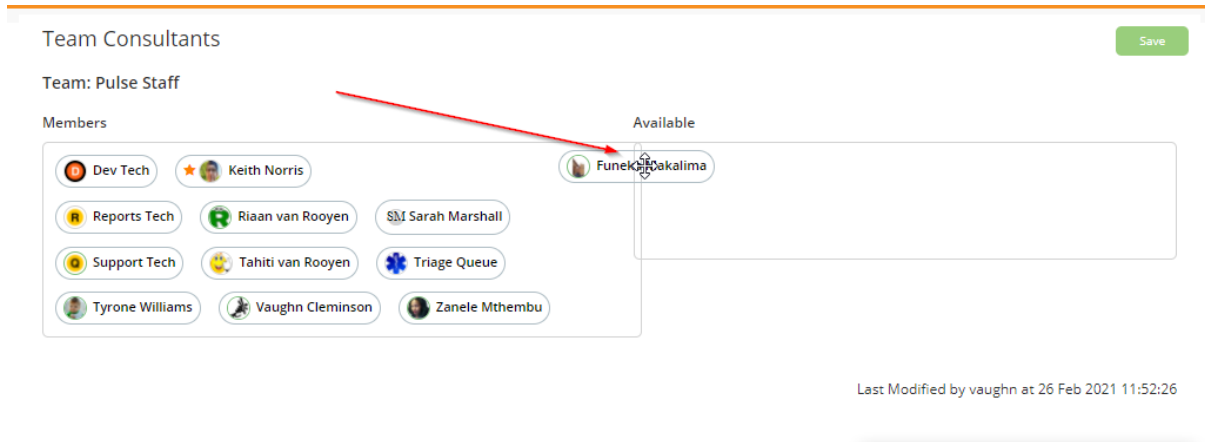
| Company Name | Service Users | Total Hours Consumed | Outstanding Quote: |
|---|---------------|----------------------|--------------------|
| Test Client | 0 | 0 | 0 |
| Technology Systems Integration | 5 | 0.72 | 0 |
| Nextec Security And Building Technologies (PTY) LTD | 97 | 0.33 | 4 |
| Ideal Time Automation (PTY) LTD | 3 | 0 | 1 |
| Default Setup Client | 0 | 0 | 0 |
| Pulse SA | 10 | 13.8 | 0 |
| NTI Solutions (Pty) Ltd | 0 | 0.03 | 0 |
| Gage Car Rental (Pty) Ltd | 12 | 5.55 | 1 |

Nowrap Formatting on DIY Reports (confirm this one with Keith)

Core

A New Drag and Drop Interface for Team Membership

You can now drag Consultants to Teams and Teams to Consultants



We Have Added an Excel Export to the Licenses Page

