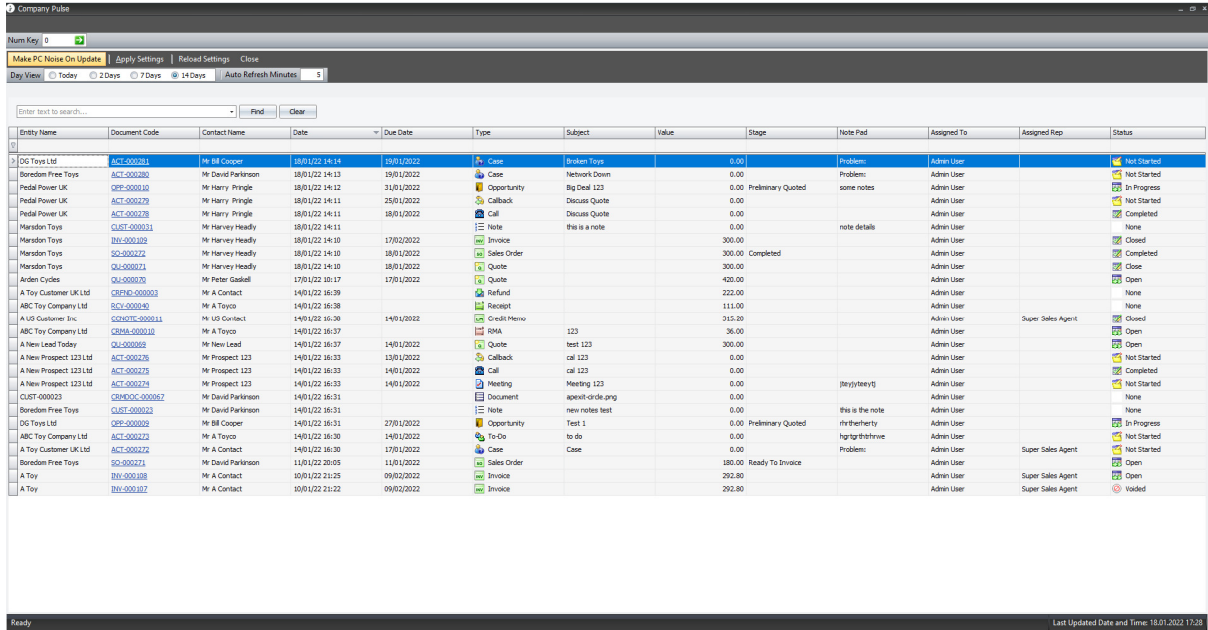


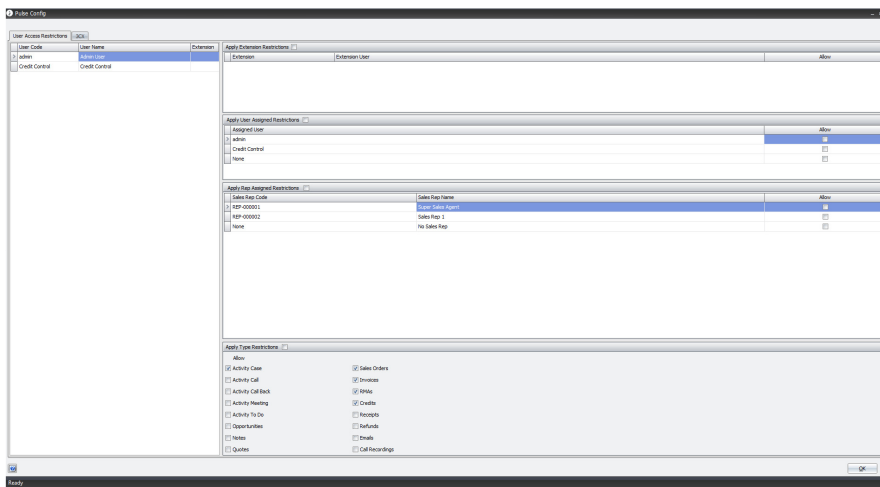
Company Pulse - keep up to date with what is happening in Customer & CRM.



Entity Name	Document Code	Contact Name	Date	Due Date	Type	Subject	Value	Stage	Note Pad	Assigned To	Assigned Rep	Status
DOG Toys Ltd	ACT-000281	Mr Bill Cooper	18/01/2022 14:14	19/01/2022	Case	Broken Toys	0.00		Problem:	Admin User		Not Started
Boredom Free Toys	ACT-000280	Mr David Parkinson	18/01/2022 14:13	19/01/2022	Case	Network Down	0.00		Problem:	Admin User		Not Started
Pedal Power UK	OP-000010	Mr Harry Pringle	18/01/2022 14:12	21/01/2022	Opportunity	Big Deal 123	0.00	Preliminary Quoted	some notes	Admin User		In Progress
Pedal Power UK	ACT-000279	Mr Harry Pringle	18/01/2022 14:11	19/01/2022	Callback	Discuss Quote	0.00			Admin User		Not Started
Pedal Power UK	ACT-000278	Mr Harry Pringle	18/01/2022 14:11	18/01/2022	Call	Discuss Quote	0.00			Admin User		Completed
Haradon Toys	CLST-000031	Mr Harvey Headly	18/01/2022 14:11		Note	this is a note	0.00		note details	Admin User		None
Haradon Toys	INV-000302	Mr Harvey Headly	18/01/2022 14:10	17/02/2022	Invoice		300.00			Admin User		Closed
Haradon Toys	SO-000222	Mr Harvey Headly	18/01/2022 14:10	18/01/2022	Sales Order		300.00	Completed		Admin User		Completed
Haradon Toys	QU-000011	Mr Harvey Headly	18/01/2022 14:10	18/01/2022	Quote		300.00			Admin User		Closed
Aiden Cycles	QU-000030	Mr Peter Gadsell	17/01/2022 10:17	17/01/2022	Quote		420.00			Admin User		Open
A Toy Customer UK Ltd	CRFNL-000003	Mr A Contact	14/01/2022 16:39		Refund		222.00			Admin User		None
ABC Toy Company Ltd	RCV-000040	Mr A Toyco	14/01/2022 16:38		Receipt		111.00			Admin User		None
A US Customer Inc	CO202C-000011	Mr US Contact	14/01/2022 16:39	14/01/2022	Credit Memo		315.00			Admin User	Super Sales Agent	Closed
ABC Toy Company Ltd	CRMA-000010	Mr A Toyco	14/01/2022 16:37		RMA	123	36.00			Admin User		Open
A New Lead Today	QU-000069	Mr New Lead	14/01/2022 16:37	14/01/2022	Quote	test 123	300.00			Admin User		Open
A New Prospect 123 Ltd	ACT-000276	Mr Prospect 123	14/01/2022 16:33	13/01/2022	Callback	cal 123	0.00			Admin User		Not Started
A New Prospect 123 Ltd	ACT-000275	Mr Prospect 123	14/01/2022 16:33	14/01/2022	Call	cal 123	0.00			Admin User		Completed
A New Prospect 123 Ltd	ACT-000274	Mr Prospect 123	14/01/2022 16:33	14/01/2022	Meeting	Meeting 123	0.00		(jety/jety)	Admin User		Not Started
CUST-000023	CLST-000002	Mr David Parkinson	14/01/2022 16:31		Document	apostin order gang	0.00			Admin User		None
Boredom Free Toys	CLST-000021	Mr David Parkinson	14/01/2022 16:31		Note	new notes test	0.00		this is the note	Admin User		None
DOG Toys Ltd	OP-000002	Mr Bill Cooper	14/01/2022 16:30	27/01/2022	Opportunity	Test 1	0.00	Preliminary Quoted	r/rbetherly	Admin User		In Progress
ABC Toy Company Ltd	ACT-000273	Mr A Toyco	14/01/2022 16:30	14/01/2022	To-Do	to do	0.00		hgprthhrvve	Admin User		Not Started
A Toy Customer UK Ltd	ACT-000272	Mr A Contact	14/01/2022 16:30	17/01/2022	Case	Case	0.00		Problem:	Admin User	Super Sales Agent	Not Started
Boredom Free Toys	SO-000271	Mr David Parkinson	11/01/2022 20:05	11/01/2022	Sales Order		180.00	Ready To Ship		Admin User		Open
A Toy	INV-000309	Mr A Contact	10/01/2022 21:25	09/02/2022	Invoice		292.80			Admin User	Super Sales Agent	Open
A Toy	INV-000307	Mr A Contact	10/01/2022 21:22	09/02/2022	Invoice		292.80			Admin User	Super Sales Agent	Voided

The Company Pulse dashboard auto updates transactions in date time created order. So the latest are at the top of the list. You can leave the dashboard as an open window. A heart beat sound signals an update.

The transaction types shown are : Activity Case, Activity Call, Activity Call Back, Activity Meetings, Activity To Dos, Opportunities, Notes, Quotes, Sales Orders, Invoices, RMAs, Credits, Receipts, Refunds, Emails (if in exchange email customer tab), 3CX Call Recordings (if applicable).



We have also implemented User restrictions to control what a user can see based on : Transaction Type, Call Recordings by extension, Transactions assigned to User or Rep.



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The screenshot shows the 'Customer - CUST-000001 - A Toy Customer UK Ltd' window. The 'Company Pulse' tab is highlighted in red. Below the navigation bar, there is a table with the following data:

Entity Name	Document Code	Contact Name	Date	Due Date	Type	Subject	Value	Stage	Note Pad	Assigned To	Assigned Rep	Status
A Toy Custom...	ACT-000272	Mr A Contact	14/01/2022	17/01/2022	Case	Case	0.00		Problem:	Admin User	Super Sales Ag...	Not Started
A Toy Custom...	CRFND-000003	Mr A Contact	14/01/2022		Refund		222.00			admin		None

You can also see in the customer record the same dashboard just for this customer.

The screenshot shows the 'Pulse Config' dialog box. It features the 3CX logo and the following fields:

- User Access Restrictions: 3CX
- 3CX URL:
- Username:
- Password:
- Keep audio recordings for: days

At the bottom right, there is an image of a 3CX phone system and a smartphone displaying a chat interface with a customer service agent.

If you have 3CX then we can show the call recordings in the list.