PulseBoard — The Complete User Guide

Oct 31, 2026 · @Joyce

Where conversations become work. The complete guide to setting up and using PulseBoard on Android, the web and Windows. Edition 1, written on 31 October 2026 for the Android app 0.62.11 and the Windows app 1.0.3 (see chapter 18, Document control).

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1. Welcome to PulseBoard

PulseBoard puts your team's conversations, tasks, notes and knowledge into one workspace, with an AI assistant that keeps work moving. This guide shows every screen, icon and card you will meet, and how to run your company on it.

Who this guide is for. Buyers and workspace owners setting PulseBoard up, administrators who manage people and settings, and team members learning the daily routine. Each chapter says who it applies to.

What you get

Area	What it does	Chapter
Chats	One-to-one and group conversations with replies, reactions, files, voice notes, polls and questions	6, 7, 8
Tasks	Assign work, track it from To Do to Completed, see it as a list	9

Area	What it does	Chapter
	or a board	
Notes	Personal notes you can link to tasks	10
Knowledge Base	Articles for the answers your team keeps asking for	10
Team Pulse	A health view of progress, overdue and blocked work	11
Krishna (AI)	An assistant that creates and updates tasks from a conversation	12
Administration	People, roles, branding, notifications, app lock, plans and billing	3, 4, 13

Where you can use it

Platform	How to get it	Best for
Android app	Google Play, package `com.thinkscaler.chat`	Daily use on the move, notifications, check-in with location, scanning QR codes
Web app	Any modern browser, signed in with your work account	Desk work, bulk import, the full-screen Monitor board, larger task boards
Windows app	Download page on the website, or the Microsoft Store	Always-on desktop with a tray icon, unread badge and desktop notifications

All three share one workspace and one set of data: a message sent on a phone appears at once on the web. Chapter 16 lists the few things that differ.

How to read this guide

- **Steps** are numbered and tell you exactly what to tap.
- **Tables** summarise options so you can scan them.
- **Names in bold** are labels you will see on screen, spelled the way the app spells them.
- Chapter 14, the Visual Dictionary, is the place to look when you meet an icon, pill or colour and want to know what it means.
- Features marked **Android** exist only in the Android app; everything else works on all platforms unless stated.

> *This guide describes PulseBoard version 0.62 (October 2026). Screens evolve; the in-app **Info → What's New** page always lists the latest changes.*

2. Quick start: your first ten minutes

A workspace is useful the moment two people are in it. Follow this list in order; each item points to the chapter with the detail. Tick items off as you go.

- ☐ **Sign in** with Google or email and create your company (chapter 3, steps 1 to 3). You become the Owner.
- ☐ **Add your logo and colours** under Settings → Workspace Settings → Branding & info.
- ☐ **Invite two or three colleagues** from People → Invite user, choosing a role for each (chapter 4 explains the roles).
- ☐ **Say hello.** Open Chats → New Chat, pick a colleague, send a message and try a reaction by holding it.
- ☐ **Make a group** for your team: New Chat → Create Group Chat (chapter 7).
- ☐ **Create the first task.** Tasks → Add Task, give it a title, an assignee, a priority and a due date (chapter 9).
- ☐ **Turn a message into a task.** Hold a message → Create Task.
- ☐ **Write one Knowledge Base article**, such as how your team handles leave or support (chapter 10).
- ☐ **Check Krishna.** Open its chat and say hello; set its name and tone under AI assistant (chapter 12).
- ☐ **Set quiet hours and the daily digest** under Notification schedule (chapter 13).
- ☐ **Install the other apps.** The web and the Windows app use the same login (chapter 16).
- ☐ **Decide on App lock.** If your team works from phones, switch it on under Workspace Settings → Security (chapter 13).

A day with PulseBoard

Who	Morning	During the day	End of day
Everyone	Open **Tasks**, filter *Assigned to Me*; pull down in Chats to read notifications	Reply in chats; mark tasks **In Progress**; add comments	Complete finished tasks with a note; set tomorrow's reminders
Admins and managers	Open **Team Pulse**; look at *Needs Attention*	Assign work; approve due-date requests; answer questions in the Question bank	Share a **Report** card to the team chat
Owner	Check Seats under People	Invite and remove people; adjust Krishna	Review Plan & billing monthly

Five habits that make PulseBoard work

1. **Put work in a task, not just a message.** Messages scroll away; tasks have an owner and a date.
2. **Give every task a due date** and an assignee. Without them it cannot be overdue, and it cannot be found.
3. **Use @mentions** so the right person is notified, and so Krishna answers in groups.
4. **Write why** when you block, complete, delete or move a date. It is the history your team will thank you for.
5. **Keep answers in the Knowledge Base** so nobody asks twice.

3. Creating your company

A company in PulseBoard is a private workspace: its people, chats, tasks, notes and settings belong to it alone. Whoever creates it becomes its **Owner**. Setting up takes about five minutes.

Step 1 — Sign in

Open PulseBoard and choose how to sign in:

- **Sign in with Google** — one tap with your Google account.
- **Continue with email** — choose *New here? Create an account*, enter your email and tap **Send verification code**. Type the 6-digit code from the email, then choose a password.

A password needs at least 8 characters, one letter and one number. The screen ticks each rule off as you type. If you forget it later, use **Forgot password?** on the sign-in screen: it sends a new verification code.

Step 2 — Tell PulseBoard who you are

A new account sees *Welcome to PulseBoard — You're not part of a company yet.* If someone has already invited your email, you will see **You've been invited to join** followed by the company name and a **Join** button instead (see "Joining an existing company" below). To start your own, choose **Create a company instead**.

The screen *Let's get your work profile ready* asks for:

Field	What to enter	Notes
Full Name	Your name as colleagues should see it	Shown on every chat, task and card
Username	A short handle, used for @mentions	Tap **Check Availability**. It must be unique inside your company; the same handle can exist in another company
Phone	Your mobile number	Used for the call shortcut on a chat with you

Step 3 — Name the company

On *Set up your company*, type the **Company name** and tap **Start free trial**. Company names are unique across PulseBoard; if yours is taken you will be asked to choose another.

When it finishes, you are the Owner, the free trial has started, the AI assistant Krishna is switched on, and Krishna sends the first welcome message to every person who joins. On the web the same steps appear as **Create Workspace** (organization name, your name, username and phone), followed by a page where you pick the company colour theme.

Step 4 — Brand it

Open **Settings → Workspace → Branding & info** (owner and super admin only).

Setting	What it changes

Setting	What it changes
Company logo	Shown on the splash screen, in the header and in the company panel. The splash waits for the logo and fades it in
Brand palette	The accent colour of the whole workspace (buttons, links, active tabs). Every person still chooses light or dark for themselves
Address, website, industry, support contact	Shown on **Company Information** to everyone

Step 5 — Invite your people

1. Open **People** from the company panel (tap the company name at the top of Chats).
2. Tap **Invite user**.
3. Enter the **Email address**, choose a **Role** (Admin, Member, or Member (Dashboard) — see chapter 4), and optionally a **Designation** such as *Manager*.
4. Tap **Send Invite**.

The invitation waits for that email address. Pending invitations can be cancelled with **Cancel invite**. The page header shows **Seats: N of M used**; when you reach the limit you are offered **Add seats** (owner) or told to ask the owner. The free plan has its own user limit and asks you to upgrade before inviting more.

Many people at once (web and Windows). Use **Bulk import**: upload a spreadsheet, review the list PulseBoard builds from it, fix anything flagged, then choose who to invite. Staging a person does not invite them — nothing is sent until you confirm.

Joining an existing company

When you are invited:

1. Sign in with the **same email address** the invitation was sent to.
2. PulseBoard shows *You've been invited to join [Company]*. Tap **Join**.
3. On *Welcome to the team!* confirm your name, choose a username and add a phone number. **Save & Continue**, or **Skip for now** if the screen offers it.

On the web this welcome page also asks for optional profile details (blood group, gender, nationality, address), which you can also edit later from **Settings → My Profile**.

Signing in on another device

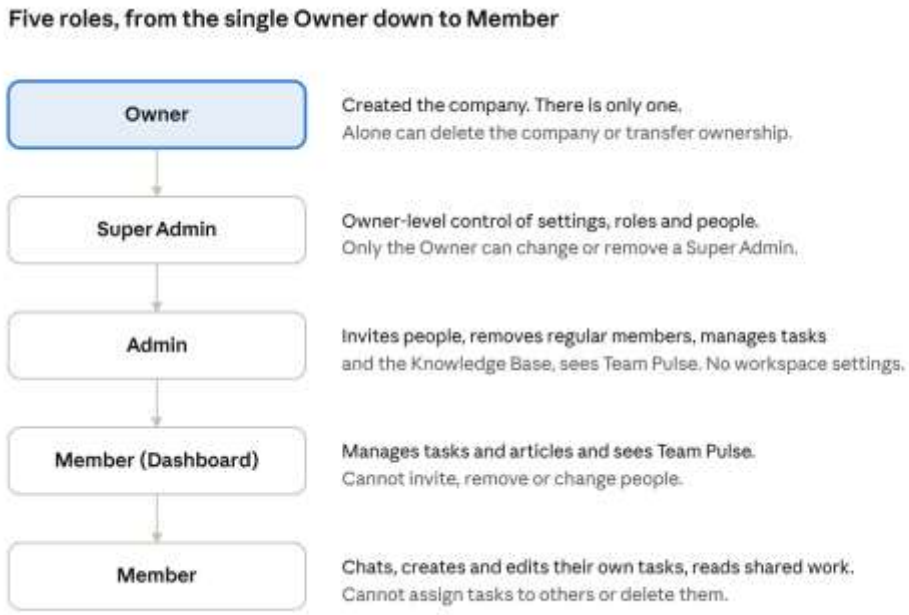
Open **Settings → Devices** to see every place you are signed in and to sign out the others. To sign in on the web without typing a password, show the **QR code** on the web sign-in page and scan it from **Devices → Scan** in the Android app, then approve.

If you delete a company by mistake

Only the Owner can delete a company. Its data is kept for a retention period, and the Owner is shown *You deleted this company — Its data is retained until [date], then permanently deleted* with a **Restore Company** button until that date.

4. Roles and permissions

Every person has exactly one role, set by the Owner or a Super Admin. Roles decide what you can see and change; they never change how the app looks.



roles ladder · 5 roles

Authority runs down the ladder: each role can do everything the roles below it can, within the limits in the tables that follow.

The roles at a glance

Role	Label shown in the app	Who it is for
Owner	owner	The person who created the company. There is exactly one
Super Admin	superadmin	A trusted deputy with owner-level control of settings and people
Admin	admin	Team leads who manage people's work and the knowledge base
Member (Dashboard)	member (dashboard)	Managers who need to see progress and

Role	Label shown in the app	Who it is for
		manage tasks and articles, without administering people
Member	member	Everyone else

Role labels appear in lower case on profile cards and the workspace header, to the right of your name or beside the chevron.

What each role can do

Capability	Owner	Super Admin	Admin	Member (Dashboard)	Member
Chat 1:1, create groups, send files and voice notes	Yes	Yes	Yes	Yes	Yes
Create a task for yourself	Yes	Yes	Yes	Yes	Yes
Assign a task to someone else	Yes	Yes	Yes	Yes	No
Edit any task	Yes	Yes	Yes	Yes	Only tasks they created or are assigned to
Delete (soft) any task	Yes	Yes	Yes	Yes	No
Read tasks	All	All	All	All	All company tasks can be read; own and created tasks are listed by default
Write and edit Knowledge Base articles	Yes	Yes	Yes	Yes	Read only
See Team Pulse (company health)	Yes	Yes	Yes	Yes	No
Invite and remove people	Yes	Yes	Yes (can remove regular members only)	No	No

Capability	Owner	Super Admin	Admin	Member (Dashboard)	Member
Change someone's role	Yes	Yes (cannot change the Owner; cannot change another Super Admin)	No	No	No
Open Workspace Settings (branding, AI, notifications, app lock, plan)	Yes	Yes	No	No	No
Delete a group chat they did not create	Yes	Yes	Yes	No	Only if they created it or own the group
Transfer ownership, delete the company	Owner only	No	No	No	No

The Owner cannot leave the company until ownership has been transferred; the Owner's role changes only through **Transfer Ownership**. A person who leaves, or is removed, disappears from chats, groups and task assignments everywhere.

Designations

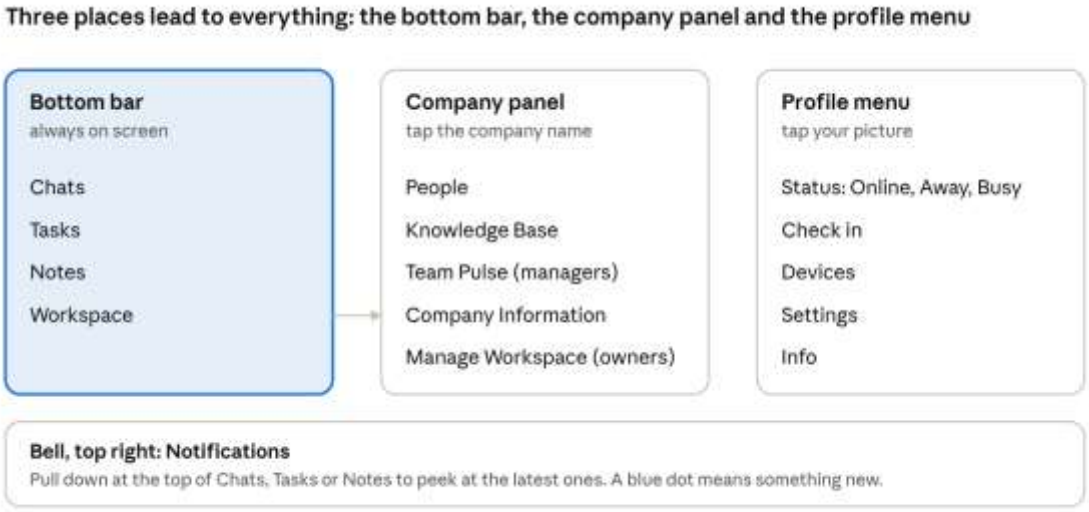
A designation is a job title such as *Manager* or *Designer*, shown on a person's profile. Owners, super admins and admins can edit it from **Manage Member**. It has no effect on permissions.

Who may do what to people

- **Invite:** Owner, Super Admin and Admin, as Admin, Member or Member (Dashboard).
- **Remove:** Owner removes anyone except themselves; a Super Admin can be removed only by the Owner; an Admin can remove regular members only.
- **Change role:** Owner and Super Admin. Nobody can change their own role.

5. Finding your way around

PulseBoard answers three questions on every main screen: *where do I work* (the company name at the top left), *what am I doing* (the bar at the bottom) and *who am I* (your picture at the top right).



navigation map · 3 entry points

The Workspace button in the bottom bar opens the same company panel as tapping the company name.

The main screen

Area	What it is	What happens when you tap it
Company name with a small down-arrow (top left)	The workspace you are in	Opens the **company panel** (below). Tap again to close
Bell (top right)	Notifications. A small blue dot means something new	Opens the Notifications page
Your picture (top right)	Your profile menu	Opens the **profile menu** (below)
Search box	*Search chats, tasks, notes*	Finds all three at once as you type
Round blue **New Chat** button	Starts a conversation	Opens the people picker. It hides while you scroll down and while you select chats
Bottom bar	Four buttons: **Chats**, **Tasks**, **Notes** and a fourth	Switches section. The current one is filled and blue

The bottom bar

The first three buttons are fixed. Each shows an outline icon when you are elsewhere and a filled blue icon, with a soft blue pill behind it, when you are there.

Button	Icon	Opens

Button	Icon	Opens
Chats	Speech bubble	Conversations and groups
Tasks	Circle with a tick	Your work, as a list or a board
Notes	Page	Your notes
Workspace (default fourth button)	Four rounded squares	The company panel

The fourth button is your choice. In **Settings → Preferences → Bottom bar shortcut** you can turn it into a direct shortcut to **People**, **Knowledge Base**, **Team Pulse**, **Company Information** or **Manage Workspace** — only those your role may open are offered.

The company panel

Tap the company name (or the Workspace button) to slide the panel down. It has:

- Your company's logo and name, with *Current workspace* underneath.
- Tiles for **People**, **Knowledge** and, for owners, super admins, admins and dashboard members, **Team Pulse**.
- A **WORKSPACE** group: **Company Information** (*Organization profile & details*) and, for owners and super admins, **Manage Workspace** (*Members, roles & settings*).
- Round shortcuts to the company's own links (a website, a handbook), if the Owner has added any.

The profile menu

Tap your picture. From top to bottom:

1. **Your status** — a coloured dot and a word. Tap it to change it:
    - Green dot — **Online**
    - Amber dot — **Away**
    - Red dot — **Busy** Colleagues see this dot on your avatar in chat lists and headers.
2. **Check in** — shares your precise location with the team as a card in chat (Android; location is only shared when you choose to check in).
3. **Devices** — where you are signed in; sign out other devices; scan a QR code to approve a web sign-in.
4. **Settings** — see below.
5. **Info** — About, What's New, help and legal documents.

Settings

Settings opens with your profile card (name, picture, role label) and then:

Item	What it does
Your profile	Edit name, phone, employee ID, blood group, gender, nationality, address and date of birth

Item	What it does
Appearance	Light or dark, for you only. The accent colour is the company's
Bottom bar shortcut	Choose the fourth bottom-bar button
Notifications	Which alerts you receive and how
Task filters / Reset task filters	Your default filters on the Tasks list
Replay app tour	A quick walk through what PulseBoard can do
Devices	Where you're signed in
Privacy & data	Consent, your data, nominee, grievance
Report AI content	Flag an inappropriate or wrong reply from the AI assistant
About & what's new	Version, help, legal
Workspace Settings, People, Knowledge Base	Shown to roles that may use them
Log out	Signs out of this device

Notifications

- **Pull-down panel.** At the top of Chats, Tasks or Notes, pull down to reveal the latest notifications without leaving the screen. Tap one to open what it is about; **Mark all read** clears the blue dot; **See all** opens the full page.
- **Notifications page.** Grouped as **Today**, **Yesterday**, **This Week** and **Older**. Swipe a notification away to remove it (an **Undo** appears), or use **Clear all** (it asks first and cannot be undone). A task notification names the task it is about, for example *Task · Research LinkedIn Automation Tools*.
- **No new notifications** and *You're all caught up.* mean there is nothing to read.

Search

The search box on Chats looks through chat names and last messages, then task titles, descriptions and task numbers (type *00025* or *TTASK-00025*), then notes (owners and admins). Results appear in three groups headed **Chats**, **Tasks** and **Notes**. If nothing matches you see *No results found for "…"*.

Tour

First-time users see a short tour. You can replay it any time from **Settings → Replay app tour**.

6. Chats

The Chats tab lists every conversation you are part of, newest first, with your pinned chats on top.

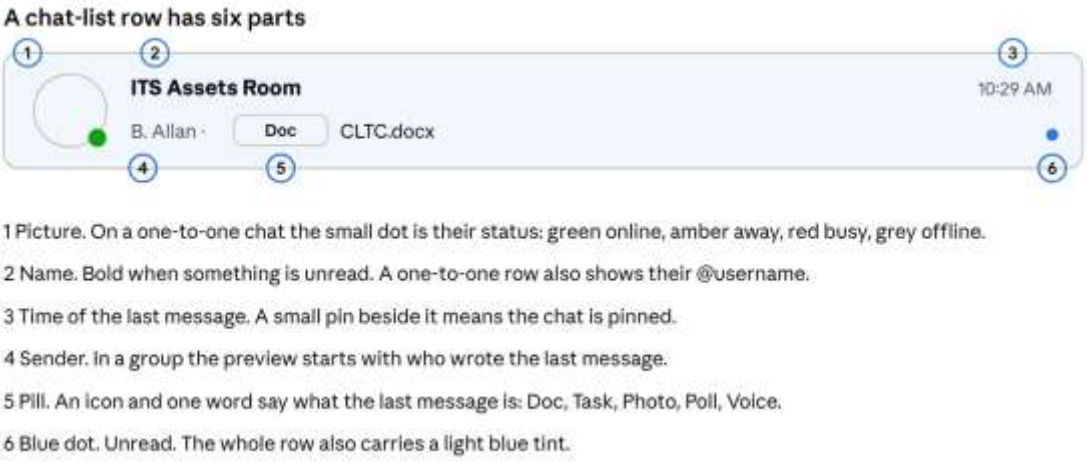
Starting a one-to-one chat

1. On **Chats**, tap **New Chat**.
2. Search for a colleague by name in *Search users…*, or switch on **Show Admins Only** to narrow the list.
3. Tap the person. The conversation opens; if you have chatted before, the old one opens instead of a duplicate.

Each person in the list carries a small status dot (see chapter 14). Krishna, the AI assistant, is in the list too and shown as an *AI teammate*.

Reading a row in the chat list

Every row has the same parts, left to right and top to bottom:



chat-list row anatomy · 6 parts

A row of an unread, pinned or mentioned chat adds the signs in the table below.

Part	What it tells you
Round picture	The person, or the group's picture. On a one-to-one chat a small dot at its bottom-right shows their status
Name	Bold when you have something unread. A one-to-one row also shows the person's @username in grey
Pin icon	Small pin beside the time: this chat is pinned for you
Time or date	When the last message was sent (time today, otherwise the day)
Preview line	The last message. In a group it starts with who sent it, for example *S. Routray · Okay.*
Double tick	Appears before the preview when **you** sent the last message: see

Part	What it tells you
	the tick table in chapter 14
Small pill	When the last message is not plain text, a rounded pill with an icon and one word tells you what it is: *Task*, *Doc*, *Photo*… followed by its title or file name
Blue dot (right)	You have not read the last message. The row is also tinted a very light blue
Mentioned you (violet)	The last unread message @mentions you
@name in blue	A mention inside the preview text

Select chats: hold, tap, act

Hold a row for about half a second. You feel a short tick, the row is selected, and the header turns into an action bar. Tap more rows to add them or to remove them again. To leave selection, tap the **X** or press Back.

A selected row has a soft blue tint and a blue check on its picture. The bar shows **N selected** and, on the right, only the actions that make sense:

Button	When it appears	What it does
Pin / Unpin (pin, with a slash when unpinning)	Always	Pins the selected chats. If every selected chat is already pinned the button unpins them
Mark as read / Mark as unread (speech bubble)	When at least one selected chat can change	**Mark as read** if any is unread; otherwise **Mark as unread**. Chats whose last message is your own, or an activity marker, are skipped
Delete (bin)	Only when you are allowed to delete **every** selected chat	Asks first, then removes the conversations for everyone in them. Cannot be undone
⋮ → **Chat info**	Only when exactly one chat is selected	Opens the group's info page or the person's profile

You may delete a chat that you created, a group you own, or any chat if you are an Owner, Super Admin or Admin. If even one selected chat is not yours to delete, the bin does not appear, so a single press never half-succeeds.

Pinning

Pinned chats stay at the top of your list, with a small pin beside the time. Pinning is personal: it changes only your own list.

Inside a conversation

The header shows the back arrow, the picture, the name and a line underneath (*Online*, *Away*, *Busy*, or *Last seen* with a time, and *typing…* while the other person types). On the right:

Icon	Name	Does
Magnifier	Search	Searches this conversation's messages and file names; step through matches with the arrows
Phone	Voice call	Opens your phone's dialler with the person's number (one-to-one only). If they have not added a number you are told so
Bin	Delete chat	Only for the person who created the chat. Asks first

Tap the name to open **Chat Details** (for a person: *View Profile* and *Shared Files*) or **Group Info** (for a group, chapter 7). Under the header two tabs switch between **Chat** and **Shared Files**, where every photo, document and voice note ever sent is gathered in one place.

Other things you will see in a conversation:

- **Date labels** such as *Today · Oct 31* between days.
- **Grey activity markers** in the middle, such as *You removed Krishna* or *Amar created the group* (see chapter 7).
- A **pinned message strip** under the header when a message is pinned. Tap it to jump to the message, tap again for the next pin, hold it to unpin.
- A small **blue chip under a message** that reads like work, offering **Create task** (chapter 9).
- The **message box** at the bottom (chapter 8).

7. Group chats

A group is a shared conversation with a name, a picture, members and one or more **group owners**. Use groups for teams, projects and announcements.

Creating a group

1. On **Chats**, tap **New Chat**, then **Create Group Chat**.
2. Type the **Group Name** (up to 60 characters).
3. Tick the people to add. Search by name; **Show Admins Only** narrows the list.
4. Tap **Create Group**. The button shows *Creating…* while it works.

You become the group's owner, and the conversation opens with a grey marker *You created the group*.

What a group looks like

- The header shows the group picture, the name and a line such as *5 members*. There is no call button, since there is no single number to dial.
- Each person's name and picture appear **once** above their first message in a run, not on every line. In a one-to-one chat the picture is not shown at all.

- Messages from others sit in a neutral bubble with a hairline outline; yours are in a soft indigo-tinted bubble with no outline, so you can tell them apart at a glance.

Group Info

Tap the group's name in the header. The page shows:

Section	What is there
Picture and name	**Change photo** / **Remove photo** and **Edit group name** (owners and managers only)
Manage group	**Add members** — search *by name or @username*; people already inside show *Already in this group*; the list is headed *Workspace members*
Members	Everyone in the group, with an online or away dot. A small ✦ and the words *Group owner* mark owners. Your company role label (*OWNER*, admin…) shows too
Per-member menu	**View profile**, **Make group owner**, **Remove as group owner**, **Remove from group**
Chat stats	A card with **Messages**, **This week**, **Files** and **Photos** counts and the date the group was created
Shared Files	Every photo, document and voice note, grouped by type

Who can manage a group

Action	Group owner	Person who created it	Company Owner, Super Admin, Admin	Other members
Rename, change the picture	Yes	Yes	Yes	No
Add or remove members	Yes	Yes	Yes	No
Make or remove other owners	Yes	Yes	Yes	No
Delete the group	Yes	Yes	Yes	No
Write, react, reply, pin messages	Yes	Yes	Yes	Yes

Safeguards: a group always has at least one owner, so the last owner can never be removed or demoted (the app says *This is the group's only owner.*). Nobody can remove themselves from a group. Removing an owner's rights keeps them in the group as a normal member.

Activity markers

Changes to the group appear as small grey lines in the conversation, written in plain words:

Marker	Meaning
Amar created the group	The group started
You changed the group name to "Design"	A rename. The old name is not shown
Amar added Priya and Joyce / *Priya joined*	New members
You removed Krishna	Someone was taken out
Priya left the group	A person left, for example because they left the company
Amar changed the group photo / *removed the group photo*	Picture changes
Amar made Priya a group owner / *removed Priya as a group owner*	Ownership changes
Amar linked the task "Quarterly report"	A task was shared here. Tap the line to open it
Amar shared the note "Meeting minutes"	A note was shared here. Tap to open it

If the task or note is gone, the line says so (*Task no longer available*, *Note deleted*) and no longer opens.

8. Messages in detail

The message box

The bar at the bottom of a conversation is a single rounded pill. Left to right:

Control	Icon	What it does
Emojis	Smiley	Opens the emoji keyboard inside the app
Text field	—	Type your message. Press Enter on the web to send; **Shift+Enter** adds a new line
Camera	Camera	Take a photo and send it
Attachments and commands	Plus	Opens a sheet with **ATTACH** (**Camera** *Take a photo*, **Image** *Photos*, **Document** *PDF, Word…*) and **COMMANDS** (the "/" shortcuts)
Voice note / Send	Microphone, which turns into a paper plane once you type	Tap the microphone to record; the bar shows *Recording 00:12* with a bin to discard. Send posts it

You can also **drag files onto a conversation** on the web and Windows apps; a drop indicator appears.

Typing @ opens a list of people; pick one and the name becomes a link to their profile and notifies them. In a group, **@Krishna** asks the AI assistant a question; it answers only when mentioned. Links you type become tappable.

Hold a message: reactions and actions

Press and hold any message. The whole row lights up straight away; after about half a second the options open:

1. **Quick reactions:** ❤️ 👍 😂 😮 😢 🙏 — tap one. Tap it again to take it back. A **+** opens the full emoji tray (any emoji works), and a **three-dot button** opens the message menu.
2. **The message menu:**

Item	Does	Who
Reply	Quotes the message in your next one	Everyone
Create Task	Starts a new task whose description is the message	Everyone
Save to Notes	Saves the text as a note	Everyone
Copy	Copies the text	Text messages
Forward	Sends it to other conversations	Everyone
Message info	Stats and the read report (below)	Everyone; the read list is for the sender
Pin Message / Unpin Message	Pins it to the strip under the header	Every member
Edit	Changes the words; the message then says *Edited* beside its time	The sender, text only, within **1 hour**
Delete	Replaces it with *This message was deleted*	The sender within 1 hour; Owner, Super Admin and Admin any time

While a message is selected the header turns into a bar: **X**, *1 selected*, then **Message info** (i), **Create Task** and **Forward**.

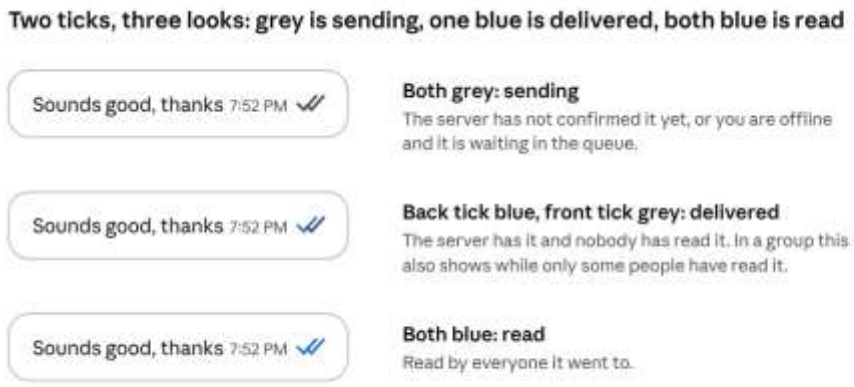
Swipe a message to the right to reply to it quickly. The reply shows a small quote of the original above your words.

Message info and the read report

Tap the (i) to see when the message was sent, how many people it reached and who has read it, with times. You can **Share report** to send the list. Who has read a message is shown only to the person who sent it.

Ticks: has it been read?

Your own messages end with a small double tick beside the time. The two halves colour independently:



message ticks · 3 looks

The tick shapes are drawn simply here; in the app they are the same two-tick symbol on every screen.

Look	Back tick	Front tick	Meaning
Both grey	Grey	Grey	**Sending.** The server has not confirmed it yet, or you are offline and it is queued
Grey and blue	Blue	Grey	**Delivered.** The server has it and nobody has read it. In a group this also shows while only *some* people have read it
Both blue	Blue	Blue	**Read** by everyone it went to

The same ticks appear before the preview in the chat list. "Everyone" means the other participants who are still in the conversation and in the company; the AI assistant is not counted.

What a message can be

Kind	How it looks	How to make it
Text	A bubble. Links are tappable, @names are highlighted	Type and send
Photo	The picture in the bubble; tap to open it full-screen with zoom and download	Camera, or Image in the + sheet
File	A PulseBoard **file card**: a pill with the file type, the name, the size and **Open**	**Document** in the + sheet
Voice note	A small player with duration	Tap the microphone

Kind	How it looks	How to make it
Task card	**TASK** card with the task number, title, status chip, priority and due date, and **Open Task**	Type **/task** and pick a task, or share from the task page
Poll	**POLL** card with the question, options and a **Vote** button	**/poll: Question, Option 1, Option 2…** (2 to 10 options, one vote each)
Question	**QUESTION** card with the status *Awaiting answer*, *Answered* or *Resolved*	**/question: your question**
Check-in	**CHECK-IN** card: *Checked in from* a place, with *Location captured*	Profile menu → **Check in**
Report	**DASHBOARD REPORT** card with **View Report**, or a shared Tasks view with **View N Tasks**	Share from Team Pulse or the Tasks list
Knowledge Base	**KNOWLEDGE BASE** card with the article title, category, *Updated* date and **Open Article**	Share from the article
Activity marker	A centred grey line	Automatic

Slash commands

Type **/** in the message box (or open **COMMANDS** in the + sheet) and pick one:

Command	What it does
/task	Pick a workspace task; a tappable task reference is dropped into your message
/poll	Type */poll:* then a question and options separated by commas, for example */poll: What should we build next?, Dashboard, Calendar, Reports*
/question	Type */question:* then your question. Add an **@name** straight after to ask one person
/help	Explains any command; the AI answers in the chat

Questions and the question bank

A question is a message that stays open until someone settles it. People answer with **Reply**; the first reply changes the card to *Answered*; the asker (or an admin) taps **Mark resolved**. A bar called **Questions** appears in conversations that have them and opens the **Question bank**:

- **Active** questions (open or answered) and **Resolved** ones, newest first.
- **Answers** lists every reply grouped by person, with **Show in chat** to jump to it.
- **Ask again** posts the same question afresh; **Close** removes it from the bank but leaves it in the chat.

Create a task from a message

When a message reads like work ("please send the report by Friday"), a small chip **Create task** appears beneath it. Tap it to start a task from that message, or **Dismiss suggestion** to hide it on this device. Once a task exists the chip turns into **View task**. If you do not want suggestions in your workspace, ask PulseBoard support to switch them off; chat itself is unaffected.

Forwarding

Forward opens the conversation picker. Pick the conversation and tap **Forward here**; a forwarded message carries a small *Forwarded* label. A forwarded question becomes a new question in the new chat.

Pins

Only one strip shows at a time. If several messages are pinned, the strip starts on the newest and each tap moves to the next. **Hold the strip** to unpin; any member of the conversation can do so.

9. Tasks

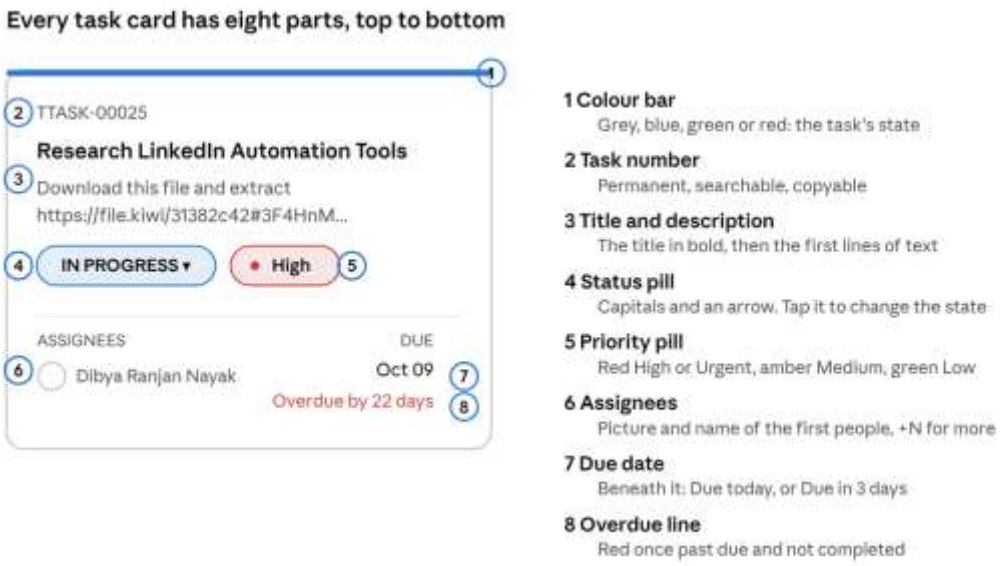
A task is a piece of work with an owner, a priority, a due date and a status. Every task gets a permanent number such as **TTASK-00042**, shown on cards and in the web address, so it can always be referred to and searched for.

The Tasks tab

Control	What it does
Search box	*Search tasks or people* — matches title, description, task number and assignee names
Filter button	Opens *Filters & Sorting* (below)
View toggle	Switches between **List** and **Board**
Share this view	Posts the current filtered list into a chat as a card
Add Task	Creates a task

Reading a task card

Every card on the list and board has the same parts. Top to bottom:



task card anatomy · 8 parts

The card above is an In Progress task that is overdue; the bar and pills take other colours for other states and priorities.

Part	Meaning
Thin colour bar along the top edge	The task's state: grey **To Do**, blue **In Progress**, green **Completed**, red **Blocked**
Task number	Small grey monospace text, for example *TTASK-00025*
Title	The task in a few words, in bold
Description	The first lines of the description
Status pill	The state in capitals with a small arrow, for example *IN PROGRESS* ▾. Tap it to change the state
Priority pill	A dot and a word: red **High**, amber **Medium**, green **Low**
ASSIGNEES	The first one or two people, with their pictures and names, and *+N* for more
DUE	The date. Beneath it: *Due today*, *Due in 3 days* in grey, or **Overdue by N days** in red
Repeating	Appears when the task repeats
Linked note chips	A small *NOTE* chip for every note linked to the task

Swipe a card about halfway across (either direction) to complete it: a green check appears and PulseBoard asks for a completion note first. A short flick does nothing, so scrolling cannot complete tasks by accident.

Creating a task

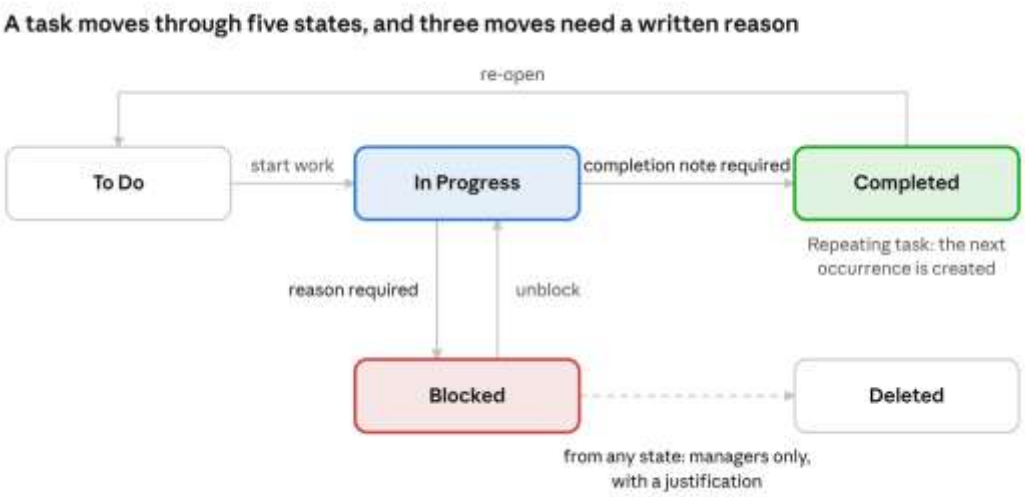
Tap **Add Task** (or **Create Task** from a message). The form has these parts:

Part	Notes
Title	Required. The Save button says *Add a title to continue* until you type one
Description	Free text; the box grows as you write
Attachments & Context	**File** (photos, PDF, Word, Excel…), **Link** (type *example.com*; https is added for you) and an optional location
Schedule	**Due date**, a **Follow Up** date, and **Repeats** — None, Daily, Weekly or Monthly
Assignment	Who does it. A plain Member can assign only to themselves; everyone else can pick any active person
Priority & Status	Priority defaults to Medium; status to To Do. Choosing *Blocked* asks for a **Blocked Reason**
Reminders	*No reminders set* until you **Add Reminder** (below)
Also share the task with the assignees in chat	Posts a task card in the assignee's chat. They are notified either way

The **Task ID** is assigned a moment after you save (*Assigned when you create the task*); tap it to copy.

The task lifecycle

A task moves between five states. Three of the moves ask you to write something, so the history always says *why*.



task lifecycle · 5 states, 3 written reasons

Any state can be chosen from the status pill. Moving to Blocked, Completed or Deleted always asks for words first; the arrows above show the usual path.

State	Label	Colour	How you get there	Asked for
To Do	TO DO	Grey	New tasks start here; also when a completed task is re-opened	—
In Progress	IN PROGRESS	Blue	Someone has started	—
Blocked	BLOCKED	Red	Something stops the work	**Reason for block** (required)
Completed	COMPLETED (shown as *DONE* on chat cards)	Green	Work is finished	**Completion note** (required)
Deleted	DELETED	—	Task removed	**Justification** (required); managers only

- A deleted task is not erased: it disappears from normal lists and appears only when you filter for *Deleted Tasks*.
- Re-opening a completed task clears who completed it and when.
- If a **repeating** task is completed, PulseBoard creates the next occurrence automatically, with the next due date, the same people and fresh reminders.
- The person who **completed** a task, and when, is recorded on the task page under *Completed by*.

Who can change what

- A **Member** can create tasks only for themselves, and edit tasks they created or are assigned to. They cannot reassign or delete.
- **Owner, Super Admin, Admin and Member (Dashboard)** can assign to anyone, edit any task, and delete.
- Every change is stamped with the real server time and the person who made it, so nobody can backdate a change or sign another person's name.

Changing the due date

Every due-date change needs a **business justification**, and the reason is written into the task's comments.

- If you **created** the task, or you are an Owner, Super Admin or Admin, the new date applies at once.
- Anyone else sends a **request**. The creator or an admin sees a banner with **Approve** or **Reject**; the requester can **Withdraw request**. Either way a line such as *Amar changed the due date from Oct 09 to Oct 16* is added to the comments.

Reminders

Open **Add Reminder** and choose when it fires:

Type	Example
Minutes before	*15 mins before* due
Hours before	*2 hours before*
Days before	*1 days before*
Custom date and time	*Oct 09, 4:30 PM*
Daily until done	*Daily at 9:00 AM until done* — repeats every day until the task is completed

For each reminder choose **Alarm** (an on-device alarm that rings even when the app is closed) and/or **App notification** (a push and a bell entry).

The task page

Tap a card to open **Task Details**:

- The header shows the number, title, status pill, priority pill and an **Edit** button.
- **DESCRIPTION**, **CONTEXT** (attachments open in the app, links open in the browser), **SCHEDULE** (due, follow up, repeats, reminders) and **Linked Notes**.
- **ASSIGNEES** — tap to see everyone, and a *Working on this task* sheet.
- **COMMENTS** — type under *Add a comment…* and **Post Comment**. Tap a comment to cross it out (the author, or an owner or admin). System notes such as due-date changes appear in the same stream.

- **Details** — *Created by*, *Updated by*, *Completed by* and the matching times.
- **Share to chat** — posts a task card to any conversation; the page then says *Shared to 1 chat*.
- **Copy Task ID** and **Delete Task**.

Filters and sorting

Filters & Sorting has these groups:

Group	Choices
View Scope	Assigned to Me, Created by Me, Unassigned Tasks, All Tasks
Timeframe & Status	Active Incomplete, Overdue, Blocked, Due Today, Due This Week, Due This Month, Completed
Priority	All Priorities, High, Medium, Low…
Urgency	All Urgencies, Urgent, Normal
Sort By	Due Date, Priority, AI Priority
Group by Assignee	Organise the list by team member

Tap **Apply Filters**; **Reset All** clears them. A strip under the search box lists the filters that are on. Set your everyday defaults under **Settings → Task filters**.

List and Board

- **List** is one scrolling column with expandable groups.
- **Board** shows columns — **To Do**, **In Progress**, **Blocked**, **Completed** — side by side. Group the columns by **Status** or by **Assignee**. Each column has a count and can **Collapse** or **Expand**.

Sharing a view

Share this view posts a card *View N Tasks* in a chat. Opening it on another person's phone opens their Tasks tab with the same filters. If you shared *Assigned to Me*, they see **your** tasks.

10. Notes and the Knowledge Base

Notes

Notes are quick pages for your own thinking: meeting minutes, call notes, ideas. The **Notes** tab has two lists, **My Notes** and **Shared**.

Action	How
Write a note	Tap **Add Note**. The title is optional (*Title (optional)*); start typing in the body. It saves as you go (*Saving…*, then *Note saved*)
Save a chat message as a note	Hold the message → menu → **Save to Notes**

Action	How
Find a note	*Search notes…* looks in titles and bodies. A note with no title shows as *Untitled Note*; an empty one as *Empty note*
Link a note to tasks	In the note, tap **Link tasks** and pick from your tasks. The note shows **Linked Tasks**, and each linked task shows a **NOTE** chip
Share a note	Tap **Share**, then *Select people to collaborate on this note*. The people you choose see it under **Shared** and can edit it. In your own list a shared note says *Shared by you*
Delete notes	Hold a note to select, add more, then **Delete Notes**. It asks first, and cannot be undone

Who can see a note. A note belongs to its author and to the people they share it with. **Owners, Super Admins and Admins can read, edit and delete every note in the workspace** (this is what lets a company recover work when someone leaves). Plain Members and Dashboard Members cannot see other people's notes unless shared.

Knowledge Base

The Knowledge Base is the company's shared handbook: answers, procedures and policies written once and found by everyone. Open it from the company panel (**Knowledge** tile).

Part	What you see
Search	*Search articles…*
FEATURED	Articles marked as featured sit at the top
ALL ARTICLES	Everything else, with the sort button (**Recently Updated**, **Recently Created**, **Title A–Z**, **Title Z–A**)
Article	A title, a short summary, a category, an *Updated* date and the article number
PulseBoard category	Built-in help articles from PulseBoard, shown to every company. They carry a lightning "P" icon in your accent colour and a **PB** number such as *PB0007*
Your articles	Numbered **KB001000**, **KB001001**… automatically (*KB number assigned automatically*)

Who writes. Owners, Super Admins, Admins and Member (Dashboard) can **Create Article**, **Edit** and **Delete**. Everyone else reads. In the editor you give the article a title, a short summary, a category (each with a small icon) and the body, and may tick **Mark as Featured** (*Show this article in Featured*). Leaving with unsaved changes asks *Discard changes?*.

Sharing. Tap **Share** on an article and pick a conversation; it is posted as a **KNOWLEDGE BASE** card that opens the article (*Open Article* →). If an article is later deleted, the card says *Article no longer available*.

11. Team Pulse

Team Pulse is the manager's view of how work is going across the whole company. It is available to Owner, Super Admin, Admin and Member (Dashboard). Open it from the **Team Pulse** tile in the company panel, or make it your fourth bottom-bar button.

What is on the page

Section	What it shows
WORK HEALTH	One score from 0 to 100 with three parts: **Execution**, **Flow** and **Risk** (below). Tap it for the full breakdown
NEEDS ATTENTION	Four rows, each with a count that opens the matching task list: **Overdue Tasks**, **Urgent Tasks**, **Blocked Tasks**, **Unassigned Tasks**. A row says *Everything is on schedule*, *No urgent tasks*, *No blocked tasks* or *Every task has an assignee* when it is clear
COMPLETION TREND	A weekly or monthly chart of tasks completed
TASK HEALTH	How many tasks are To Do, In Progress, Blocked and Completed, each as a count and a percentage
PRIORITY DISTRIBUTION	Open tasks split into High, Medium and Low
TASKS BY ASSIGNEE	Each person's open tasks, with *View tasks* for their list
WORKSPACE	**Team Members** (active people) and, for admins, **AI Usage** for the month
DELETED TASKS	Appears only when tasks have been deleted, as an audit list

Tap **Share report** to post a **DASHBOARD REPORT** card into a chat so the team sees the same numbers.

How Work Health is worked out

Part	Formula	Weight
Execution	Completed tasks ÷ all tasks × 100 (100 when there are no tasks)	30%
Flow	(Active tasks − blocked tasks) ÷ active tasks × 100 (100 when nothing is active)	40%
Risk	(Urgent + overdue tasks) ÷ active tasks × 100, at most 100 (0 when nothing is active)	30%, counted as 100 − Risk

The score is the three parts added together with those weights and rounded down. Deleted tasks are ignored everywhere. "Active" means not yet completed.

On the web: the Monitor view

Managers on the web can open **Monitor**, a full-screen wall board with live task lists, made to stay on a large screen in the office. It needs the web or Windows app, not the phone app.

12. Krishna, the AI assistant

Krishna is the assistant that lives in your workspace. It appears in the chat list as an *AI teammate* with an amber status dot. The owner can rename it, give it a job title and tell it how your company works (see below).

What Krishna does

Ability	What you will see
Conversational chat	Chat with it one-to-one, or mention **@Krishna** in a group. In a group it answers only when mentioned
Task creation and updates	Ask it to create, update or break down tasks from a conversation. A plain Member's requests follow the same limits as the Member's own permissions
Task enrichment and clarification	When a task is vague it asks a short question, and fills in what it can
Milestone follow-ups	Checks in as a due date approaches, and asks about blockers
Completion analysis	Looks at finished work and comments on what went well
Welcome	Sends every new member a first welcome message
Proactive check-ins	Pings people on its own to follow up; the owner can turn this off or set quiet hours

Krishna understands replies to its earlier messages, so you can answer a question by swiping that message to reply. Anyone can report a wrong or inappropriate reply from **Settings → Report AI content**, or from the message itself; the report goes to PulseBoard.

Setting Krishna up (owner and super admin)

Open **Workspace Settings → AI assistant**. Everything is optional; leave a field blank to keep the current value.

Group	Fields
Identity	**Name**, **Role** (for example *Product Manager*, *Scrum Master*,

Group	Fields
	Engineering Lead, *Executive Assistant*) and **Responsibilities**. The role shows under the assistant's name in chat
About your company	**Mission**, **Core activities**, **Current focus** — used to give relevant answers and decide what to follow up on
Behaviour	**Tone of voice** (for example *Direct and no-nonsense*, *Warm and encouraging*, *Formal and concise*), **Custom instructions** (rules it must always follow) and a **Steady, predictable ↔ More varied** slider
What it can do	**AI assistant enabled** — switch it off to stop it replying and sending reminders for the whole workspace. Also separate switches for task enrichment, conversational chat, milestone follow-ups and completion analysis

An **AI off** banner appears for everyone when the assistant is disabled. Usage is counted monthly; admins see it as **AI Usage** in Team Pulse.

Good to know

- What you send to Krishna, and the task details it works with, is processed by AI models. Your owner decides whether Krishna is on at all, and the Privacy Notice explains how this data is handled.
- Its answers can be wrong. Treat them as drafts and check anything important.
- Use **Report AI content** to flag anything inappropriate.

13. Workspace settings and administration

This chapter is for owners, super admins and admins. Open **Settings**; the **Workspace** page (the company name, your role beside the arrow) leads to everything below.

People

Company panel → People lists everyone in the workspace.

- Search by name or username; open the filters to narrow by role or status.
- Tap a person to see their profile: picture, name, @username, role label, designation, phone, status and how much work they have.
- Admins and above can open **Manage Member** to change a designation, change a role (Owner and Super Admin only) or remove the person.
- **Invite user** (chapter 3) shows the seat count, *Seats: 4 of 6 used*, and **Add seats** when you are at the limit.
- On the web and Windows apps, **Bulk import** adds many people from a spreadsheet (chapter 3).

Workspace Settings (owner and super admin)

Settings → Workspace Settings is organised in sections:

Section	Row	What it does
General	**Branding & info**	Logo, brand palette, address, website, industry and support contact
General	**Plan & billing**	Your plan, seats, invoices and GST details (below)
AI assistant	**AI assistant**	Everything in chapter 12
Notifications	**Notification schedule**	When automated messages go out (below)
Security	**App lock**	Requires an unlock to open the Android app (below)
Danger zone	**Delete workspace**	Owner only (below)

Everyone else sees a short notice instead: *Only the workspace owner can edit these settings.*

Notification schedule

Choose when the workspace's automated messages go out:

Setting	Meaning
Timezone	Every time below is in this zone. Pick from common choices
Daily digest hour	When the daily summary is sent
Overdue task digest	A daily summary of tasks past their due date, on or off
Proactive AI check-ins	Whether the assistant pings people on its own
Quiet hours start / end	Optional. Set both and nothing is sent in that window

App lock (Android)

Switch on **Require app lock on Android** to make everyone in the company unlock the PulseBoard app on their phone.

- It uses the lock the person already set on the phone (PIN, pattern, password, fingerprint or face). PulseBoard never sees or stores it.
- Anyone whose phone has no screen lock is asked to set one up first, with a button that opens the phone's security settings.
- The app asks to be unlocked each time it opens and again after 30 seconds in the background.
- A person who cannot unlock can always **Sign out** from the lock screen.
- It is a lock for the app, not for the phone, and it does not affect the web or Windows apps.

Turning it on asks you to confirm, because it affects everyone.

Plan and billing

Topic	Details

Topic	Details
Free trial	Every new company starts on a free trial. The page shows how many days are left
PulseBoard Pro	Paid, per seat, **Monthly** or **Annual**. Choose how many seats; the screen shows fewer/more seat options and the price with 18% GST included. On Android you pay through Google Play; on the web through the secure checkout
Enterprise	Larger teams choose **Enterprise — Contact us**
Seats	One seat per active person. **Add seats** appears when you reach the limit
Cancelling	Pro access continues until the end of the period you paid for; the page says so
GST and invoices	Add a **GSTIN**, legal company name and billing address under **Billing & GST details** to receive tax invoices. Every charge includes 18% GST. **Invoice history** lists every invoice; invoices are sent to the workspace owner
Offers	Special offers appear under **Offers** when PulseBoard sends one

Hand over or delete the workspace

- **Transfer ownership** — pick an active member to become the new Owner. They become responsible for billing and you become an Admin. Do this before the Owner leaves.
- **Delete workspace** — Owner only. It keeps the data for 30 days, during which the Owner can **Restore Company**, and then removes it permanently.

Devices and sign-in

Settings → Devices lists This device and your Other devices, with a Recently signed out list below. You can sign out one device, or choose Sign out all other devices if you lose one or do not recognise it; this also stops a copied or stolen session from renewing itself. Owners worried about a lost phone should use this, and can remove the person from the workspace if needed.

Removing people

When you remove someone, they lose access to the workspace at once and disappear from groups and task assignments everywhere. Their past messages stay in the conversations they were part of. An Admin can remove regular members; a Super Admin only the Owner can remove; the Owner is never removable until ownership is transferred.

14. Visual dictionary

Everything PulseBoard draws follows one small system. Learn it once and every screen reads the same way. Use this chapter to look up an icon, a coloured pill, a tick or a card.

The look in brief

Element	Rule
Typeface	**Inter**, in four weights: regular, medium, semibold, bold
Default theme	Dark. Light is available to each person under **Settings → Appearance**
Accent colour	Your company's brand palette colour tints buttons, links and active tabs; Pulse Blue is the default
Spacing	A 4-point grid; screen edges are 16 points in
Shapes	Cards 12 pt corners; chat rows 10; message bubbles 14; the message box a full pill
Depth	Flat. Hairline outlines, no shadows. Unread is shown by weight and a tint, not by borders
Icons	Thin line icons, one style throughout. Selected tabs switch to a filled version
Tagline	*Where conversations become work.*

Colours and what they mean

Name	Dark	Light	Where you see it
Background	#111318	#F6F7FA	Behind every screen
Surface	#181B22	#FFFFFF	Panels and sheets
Elevated surface	#1E222B	#FFFFFF	Cards, other people's bubbles
Outgoing bubble	Elevated surface tinted 14% violet	tinted 10% violet	Your own messages
Text	#F4F5F7	#171A21	Titles and body
Secondary text	#A8AFBC	#5F6673	Previews, labels
Tertiary text	#737B8A	#8A919D	Times, task numbers
Pulse Blue	#3478F6	#2869E8	Selected, links, the unread dot, **In Progress**

Name	Dark	Light	Where you see it
Cyan	#16C7E8	#079DBD	Gradients and highlights
Violet	#7048F5	#6239D9	*Mentioned you*, your bubble tint
Purple	#9B3FF2	#862DD9	Gradients
Mint	#35D0A0	#179B76	**Online**, **Completed**, **Low** priority, success
Amber	#F5B83D	#C58A19	**Away**, **Medium** priority, Krishna's dot
Red	#F05D6C	#D74757	**Busy**, **High** and **Urgent** priority, **Blocked**, **Overdue**, delete and errors
Coral and peach	#FF6B6B / #FF9F7A	#E95757 / #E97C59	Illustrations and warm accents

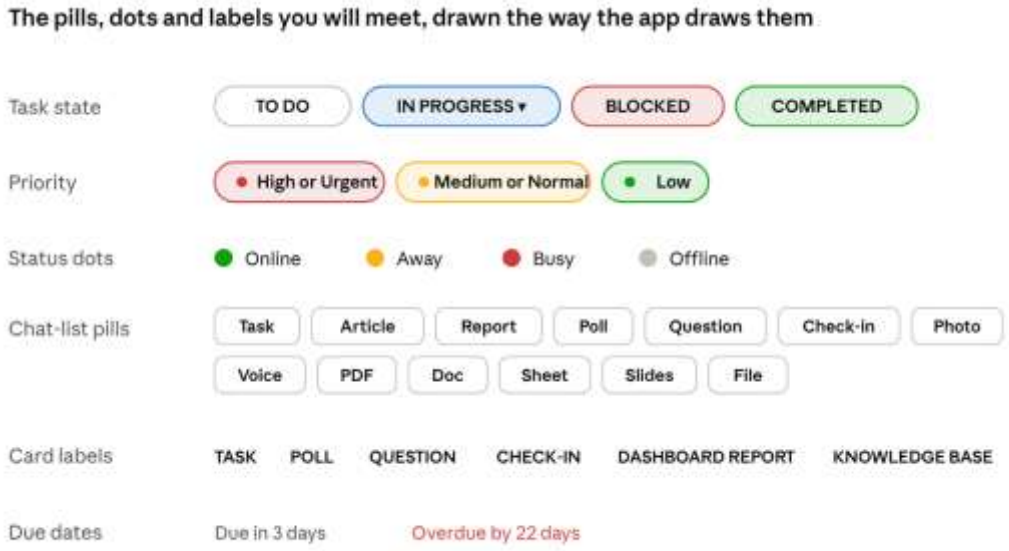
Colour is never the only signal: a status also has a word, and a tick also has a shape.

Status dots

A small dot at the bottom-right of a person's picture, and beside your own name in the profile menu.

Dot	Means
Mint (green)	**Online**
Amber	**Away**. Also the colour of Krishna's dot
Red	**Busy**
Grey	**Offline**. The header says *Last seen* with a time

Task state and priority pills



pill and dot gallery

In the app each chat-list pill also carries its small icon; the table below names every icon.

Pill	Colour	Where
TO DO	Grey	Cards, task page, board column
IN PROGRESS ▾	Blue	Tap to change state
BLOCKED	Red	Needs a reason
COMPLETED (**DONE** on chat cards)	Green	
DELETED	Red	Only in filters
● **High** / **Urgent**	Red	Priority
● **Medium** / **Normal**	Amber	Priority
● **Low**	Green	Priority
Due today / Due in 3 days	Grey text	Beneath the due date
Overdue by 22 days	Red text	Past due and not completed
Repeating	Grey text	The task repeats
Thin bar on a card's top edge	Grey, blue, green or red	The same state as the pill, visible from afar

Chat-list pills: what the last message is

When the last message is not plain text, the preview begins with a rounded pill (an icon and one word) followed by its title or file name, for example *Doc CLTC.docx*.

Pill	Icon	Appears for
Task	Checklist	A shared task
Article	Open book	A Knowledge Base article
Report	Rising line chart	A dashboard report or a shared Tasks view
Poll	Bar chart	A poll
Question	Question mark in a circle	A question
Check-in	Map pin	A shared location
Photo	Picture	A photo sent from the camera or gallery
Video	Camera	A video
Voice	Microphone	A voice note
Image	Photo	An image file
PDF	PDF page	A PDF file
Doc	Page with lines	Word, RTF or ODT files
Sheet	Table	Excel, CSV or ODS files
Slides	Slideshow	PowerPoint or ODP files
Text	Text snippet	.txt files
Audio	Audio file	MP3, M4A, AAC, WAV, OGG
File	Page with a folded corner	Any other file
Attachment	Paperclip	An attachment of unknown kind

Double ticks

See the table in chapter 8. In short: both grey = still sending; one blue, one grey = delivered; both blue = read by everyone. The same pair appears on **Completed tasks** and on **Mark resolved**.

Cards inside a chat

Every card has a small capitalised label at the top so you know what it is, then its content, then one action.

Card	Top label	Content	Action

Card	Top label	Content	Action
Task	**TASK**	Number, title, state chip, priority, due or *Overdue*, assignee	**Open Task**
Poll	**POLL** (or **CLOSED**)	Question, options, vote counts, *Your vote:*	**Vote**
Question	**QUESTION**	The question, state *Awaiting answer* / *Answered* / *Resolved*	**Answer**, **Mark resolved**
File	The file's pill (PDF, Doc…)	File name, size	**Open**
Check-in	**CHECK-IN**	*Checked in from* a place, *Location captured*	Opens the map
Report	**DASHBOARD REPORT**	The report's headline numbers, date	**View Report**, or **View N Tasks** for a shared view
Knowledge Base	**KNOWLEDGE BASE**	Title, category, *Updated* date, article number	**Open Article →**
Activity marker	none	One grey line, centred	Tap to open the task or note it names
Suggestion chip	none	**Create task** with a small cross	**View task** once created

If the thing a card points to has gone, the card says so: *Task unavailable*, *Report unavailable*, *File unavailable*, *Article no longer available*.

Icon dictionary

Where	Icon	Meaning
Bottom bar	Speech bubble	**Chats**
	Circle with a tick	**Tasks**
	Page	**Notes**
	Four rounded squares	**Workspace** (the company panel)
Top bar	Company name with a small arrow	Open the company panel
	Bell, with a small blue dot	Notifications; the dot means new
	Your round picture	Profile menu

Where	Icon	Meaning
Chat list	Pin	Pinned chat
	Blue dot	Unread
	Blue check on a picture	Row selected
	Violet words *Mentioned you*	You were @mentioned
Selection bar	X	Leave selection
	Pin / pin with a slash	Pin / unpin
	Speech bubble with a tick / with a dot	Mark as read / unread
	Bin	Delete
	Three dots	More (Chat info)
Conversation header	Arrow	Back
	Magnifier	Search this conversation
	Telephone	Call (one-to-one only)
	Bin	Delete chat (creator only)
Message bar	X	Cancel selection
	Circled i	**Message info**
	Checklist with a plus	**Create Task**
	Paper plane	**Forward**
Message box	Smiley	Emojis
	Camera	Take a photo
	Plus	Attachments and commands
	Microphone	Record a voice note
	Paper plane	Send
	Bin on a recording	Discard it
Group	✦	Group owner
	Add members button	Add members
Tasks	Check on a green swipe	Complete

Where	Icon	Meaning
	Share icon	Share this view
Settings	Padlock	**App lock**
	Devices	**Devices**
	Lightning "P" in the accent colour	A PulseBoard article

Role labels

Shown in lower case, small, beside a name: **owner**, **superadmin**, **admin**, **member (dashboard)** and **member**. A group owner is marked separately with ✦ and *Group owner*.

15. Notifications, privacy and security

What PulseBoard notifies you about

Event	Where it shows
A new message in a conversation	Push notification, chat list dot, Windows desktop alert
A task assigned to you, changed, or commented on	Push notification and the bell; the entry names the task
A task reminder (chapter 9)	An on-device alarm and/or an app notification, as the task chose
The daily digest and the overdue digest	Sent at the hour the owner chose in the notification schedule
A due-date request waiting for your decision	A banner on the task and a notification
An AI check-in from Krishna	A message in your chat with it

On Android, PulseBoard asks permission to send notifications the first time; accept it or alerts will not arrive. Choose which alerts you want in **Settings → Notifications**. The Windows app keeps an icon in the tray with an unread count and can start with Windows.

Privacy and your data

Open **Settings → Privacy & data**.

Section	What you can do
Privacy Notice and consent	Read and accept the current notice. Consent to the core service cannot be switched off on its own; withdrawing it means deleting your account

Section	What you can do
Product updates and offers	Optional and off unless you turn it on
The data we hold about you	A summary: tasks you created, tasks assigned to you, check-ins and your sign-in email. Messages, comments and files you sent live in your workspace and are not listed here
Nominee	Name someone who can exercise your data rights if you die or cannot
Grievance	Write to the grievance officer if you are not satisfied; you may also complain to the Data Protection Board of India
Delete my account	Type **DELETE** to confirm. Your personal data (name, contact details, photo, check-ins, notifications and unshared notes) is erased at once and you are signed out. Messages stay, shown as *Former member*

The Owner cannot delete the account until ownership is transferred or the workspace is deleted. PulseBoard's privacy notice is written for India's Digital Personal Data Protection Act, 2023. The full notice and terms are on the website and under **Info**.

What the workspace owner can see

Be open with your team about this. In a company workspace:

- Owners, Super Admins and Admins can read every **note**, and can delete any **chat message** (to moderate).
- Every member of the workspace can read every **task** in it (a plain Member's own list shows only tasks assigned to or created by them by default). Only Owners, Super Admins, Admins and Dashboard members can open Team Pulse.
- Owners and Admins can see each member's **check-in** history. Members see only their own.
- **Who has read a message** is shown only to its sender.
- A member's location is shared only when they tap **Check in**; it records precise coordinates, a place name and the time.

When someone leaves

When a person is removed or leaves, their access ends at once. Their personal details are erased after a 30-day window; their messages stay in the conversations as *Former member*. A deleted workspace is kept for 30 days and can be restored by the Owner during that time.

Staying secure

Safeguard	How it works
Passwords	At least 8 characters with one letter and one number. A one-time code confirms your email on sign-up and

Safeguard	How it works
	password reset
Sign in with Google	Available as an alternative to a password
Devices	**Settings → Devices** shows where you are signed in and can sign out the rest
QR sign-in	Approve a web sign-in from your phone; you never type a password on a shared computer
App lock (Android)	If the owner enables it, the app asks for your phone's PIN, pattern, password, fingerprint or face on open and after 30 seconds away (chapter 13)
Roles	Permissions are enforced on the server, not just hidden in the app
Task history	Task activity and the person who completed a task are recorded by the server and cannot be edited
Delete is reversible for workspaces	A company deleted by mistake can be restored within 30 days

Good habits. Use a screen lock on your phone; sign out of shared computers; remove people who leave the same day; give the Owner role to someone who will stay.

16. Android, Web and Windows

All three share one workspace, one login and the same data. They are designed to look and feel alike: the same sections in the same order, the same colours and the same pills and cards. The differences below are about the device, not the product.

The web app

Sign in at the PulseBoard website. On a wide screen the web app shows a sidebar with Chats, Tasks, Notes, People, Knowledge Base and Team Pulse; the company logo collapses it. Everything in this guide is available, with a few extras and a few gaps:

Topic	Web and Windows	Android
Hold a chat to select, pin, mark unread, delete	Not yet on the web chat list	Yes
Hold a message for the reaction picker	A small action bar appears when you hover a message	Hold the message
Send with	Enter; Shift+Enter for a new line	The paper-plane button
Drag and drop files into a chat or a task	Yes	Not applicable

Topic	Web and Windows	Android
Paste a screenshot (Ctrl+V)	Yes, with a preview to confirm	Not applicable
Bulk import of people	Yes	No
Monitor view (full-screen board)	Yes	No
Task board with wide columns and multi-assign	Yes	Yes, narrower
Click a chat photo for a full-screen viewer with zoom and download	Yes	Tap the photo
Check in (shares precise location)	Yes, if the browser or app allows location	Yes
Task alarms that ring with the app closed	No, notifications only	Yes
Swipe to complete, swipe to reply	No	Yes
Scan a QR code to approve a web sign-in	Shows the code	Scans the code
App lock	Not affected	Yes, if the owner enabled it
Pay for Pro	Secure web checkout	Google Play
Light and dark mode	Yes, with a floating day/night button	Yes, under Settings → Appearance

The web sign-in page also has a **Get the Windows app** tab that slides out beside the login card.

The Windows app

The Windows app is a thin shell around the web app, so it always shows the latest version without you updating anything. Install it from the **Download** page on the website or from the Microsoft Store. It adds:

- **System tray.** Closing the window keeps PulseBoard running; click the icon to open it. Right-click for *Open*, *Keep running in the tray when closed*, *Start with Windows* and *Quit*.
- **Unread count** on the taskbar button and the tray icon; the button flashes when something new arrives.
- **Windows notifications** for new messages and tasks, only when you are not already looking at PulseBoard. Click one to open that conversation.
- **Start with Windows**, off by default.
- **Remembers** its window size and position.
- **Paste a screenshot** with Ctrl+V into a chat.
- **One window only**: starting it again brings the open one forward.
- **Offline screen** with *Try again*, and automatic recovery if the page crashes.
- **Updates** to the shell itself arrive through an **Update** button in the header; the installer removes its saved data when you uninstall.

- **Help → About PulseBoard** shows version details with *Copy diagnostic info* for a support message.

Which one should I use?

If you…	Use
Are out and about, need alarms, check-in or app lock	Android
Sit at a desk all day	Windows or the web
Are a manager who wants the wall board, or must import many people	Web or Windows
Share a computer	The web, in a private window, and sign out afterwards

17. Troubleshooting, FAQ, glossary and help

Troubleshooting

Problem	What to try
I cannot sign in	Check the email. Use **Forgot password?** to receive a new 6-digit code. If you were invited, sign in with the **same email** the invitation went to
I see *You're not part of a company yet*	You have no invitation on this email. Ask the Owner to invite the address you signed in with, or create your own company
I cannot invite more people	You have used all your seats (*Seats: N of N used*). The Owner can **Add seats** under Plan & billing
A message stays grey-ticked	It has not reached the server. Check your connection; it sends on its own when you are back online
I did not get a notification	Allow notifications for PulseBoard in your phone's settings (**Settings → Notifications → Open Android notification settings**); turn off battery saving for the app; **ask your owner whether quiet hours are set in the notification schedule**
I cannot assign a task to someone	A plain Member can assign only to themselves. Ask an Admin or Owner
I cannot change a task's due date	It needs a business reason. If you did not create the task and are not an admin, the change goes to the

Problem	What to try
	creator for approval
I cannot delete a chat	Only people who created it, own the group, or are an Admin, Super Admin or Owner can delete it
The app asks me to unlock	Your owner turned on **App lock**. Use your phone's PIN, pattern, password, fingerprint or face. If your phone has no lock, the app opens its security settings
Krishna did not reply in a group	In a group it answers only when you mention it with **@Krishna**. The owner may also have switched it off
I deleted the company by mistake	The Owner can **Restore Company** from the screen shown on sign-in, within 30 days

Frequently asked questions

Is there a free trial? Yes. A new company starts on a free trial; the Plan & billing page shows the days left. When it ends, PulseBoard shows *Free Trial Ended* and the Owner chooses a plan to keep the workspace going.

Can people outside my company join? Only people you invite by email. Everyone belongs to exactly one company at a time.

Can I use my own logo and colours? Yes: Workspace Settings → Branding & info (chapter 3). Each person still chooses light or dark mode for themselves.

Who can see my messages? The people in the conversation. Owners, Super Admins and Admins can delete messages to moderate, and can read every note. See "What the workspace owner can see" in chapter 15.

Do I need the internet? Yes for sending; messages you write offline wait with grey ticks and send when the connection returns.

Can I export my data? Settings → Privacy & data shows what PulseBoard holds about you, lets you correct it, and lets you send a data request through Grievance. You can also delete your own account there.

How do I turn off the AI? The Owner or Super Admin switches **AI assistant enabled** off under Workspace Settings → AI assistant.

Glossary

Term	Meaning
Workspace / company	Your organisation's private space in PulseBoard
Owner	The one person who created the company; the only one who can

Term	Meaning
	delete it or transfer it
Super Admin	A deputy with owner-level control of settings and people
Admin	A manager of people's work and the Knowledge Base
Member (Dashboard)	A member who can manage tasks and articles and see Team Pulse
Group owner	A person who manages one group chat (shown with ✦)
Designation	A job title shown on a profile; it has no effect on permissions
Task ID	The permanent number of a task, like TTASK-00042
Blocked	A task that cannot move forward; needs a reason
Overdue	Past its due date and not completed
Pill	The small rounded label on a card or chat row
Card	A rich block inside a chat: task, poll, file, report, article, check-in
Pinned	Kept at the top (a chat in your list, or a message in a conversation)
Krishna	The AI assistant (renamable by the owner)
Seat	One paid place for one active person
Check-in	A card that shares your precise location with the team
Team Pulse	The manager's health view of tasks across the company
Question bank	The list of open and resolved questions asked in a chat

Getting help

- **In the app: Info → Help & Support**, **Send Feedback** and **Report a Problem** open your email app with a message started for you.
- **What changed lately: Info → What's New**, and the public changelog on the website.
- **Email:** info@thinkscaler.com. Privacy or data-rights complaints can also go through **Settings → Privacy & data → Grievance**.
- **Website:** thinkscaler.com.

PulseBoard is built by ThinkScaler, for teams that want fewer tools and clearer work.

18. Document control

This edition describes PulseBoard exactly as the code stood on the date below. The table is the reference point for the next edition.

Item	Value at the time of writing
Guide edition	1
Written on	2026-10-31
Android app	0.62.11 (versionCode 52)
Windows app	1.0.3
Web app	Deployed continuously; it has no version number. Its changes are in the public changelog page and in Features.md
Code baseline	Git commit 2ead307 (2026-10-29) plus the uncommitted 0.62.11 work that was in the working tree on 2026-10-31
Newest CHANGELOG.md entry covered	0.62.11, last bullet: *Blocked tasks get their colour bar too*
Newest Features.md entry covered	*2026-10-31 12:51 — Blocked task cards get the red status bar*
Windows changelog covered	windows/CHANGELOG.md, section 1.0.3
Where the facts come from	CHANGELOG.md (what users see), Features.md (the developer log), and the source in app/, web/, functions/, windows/ and firestore.rules

Version 0.62.11 had not been committed or released when this edition was written, so its entries may still change before release.

Revision history

Edition	Date	Android	Windows	What changed
1	2026-10-31	0.62.11	1.0.3	First complete edition: chapters 1 to 18, seven diagrams

How to update this guide

1. **Read the table above.** Note the Android version, the git commit, the newest CHANGELOG.md entry and the newest Features.md entry.
2. **Find what is new.** Compare with today: `versionName` in app/build.gradle.kts, `version` in windows/package.json, the sections of CHANGELOG.md and windows/CHANGELOG.md newer than those recorded, the Features.md entries below the recorded one, and `git log <commit>..HEAD`.
3. **Read the code for every change.** The changelog is a summary. Open the screens, logic files, firestore.rules and Cloud Functions involved, and copy the labels exactly as the app spells them.

4. **Edit only the chapters affected.** Keep chapter numbers stable. Redraw a diagram, and update chapter 14 (the visual dictionary), whenever a pill, icon, colour, state or card changes.
5. **Record the edition.** Add a row to the revision history, then update every value in the table above, including the new git commit and the new newest entries.

Known gaps in this edition

- There are no screenshots; the diagrams are drawn approximations of the screens.
- Written from the code and not checked on a device: hold-to-select in the chat list, the App lock screens, the message hold gesture, the tick colours and the Delete chat action.
- Trial length, free-plan seat limit and prices are set in the platform's own configuration, so they are not stated.
- The web chat list does not yet have hold-to-select, pin, mark unread or delete. Chapter 16 says so; update it when that gap is closed.
- *Settings → Notifications* is described briefly: sounds and vibration are changed in Android's own notification settings.