






**PULSE BUSINESS SOFTWARE**

Cloud-based software that drives your business.

## Release Notes - Version Gooseberry Dev (June 2023)

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### Highlights

- Service**  Response Type Notifications
- Service**  Photos on mobile app
- Inventory**  Stock Movement Document Reversals

## Service



### **Response Type Notifications**

Notifications can now be sent based on the response type. This is useful for sending updates from agendas, for example.



### **Photos on mobile app**

It is now possible to view photos attached to a service request on the mobile app.

### **Disable setting on Supplier on Client**

For implementation where suppliers (vendors) are imported from other systems (e.g. SAP) we can disable the ability to manually set clients as suppliers in Pulse.

### **Added Quotation Approval Limit on Consultan**

Added Quotation Approval Limit on Consultant

### **Show Live Project Actions on Incident**

New config to control the displaying of the "Live Project Actions" button on the Incident interface

### **Mobile, move survey button to between the camera**

Mobile, move survey button to in-between the camera and van. Also hide survey button in footer toolbar

### **Categories set as vendor account categorisation**

Categories set as vendor account categorisation can be hidden from Service Requests where the client is not a vendor.

### **Load Parent Site(s) from Service Request**

If the client path is used, then Pulse can allow loading of parent sites in the main application from the client details on the service request.

This is defaulted to off, since long client names will cause it to wrap, so it will be enabled on request.

### **Quote Margin on Financial Summary**

The quote margin (average) is now available on the service request financial summary.

### **Lock price on PO when contracted**

If you have contracted prices for certain items then these can be locked on the purchase order.

### **Warehouses Can Sell Contracted Items**

When an item is set to be only supplied by a certain supplier you can still purchase it internally from a warehouse marked as Can sell Systems from this Warehouse

### **Project Invoices to be Made**

New config to indicate if the Project Invoice to be made, Creates and posts Invoices or not.

### **Printed Checkbox on Credit Note**

Added a printed checkbox on Credit Note

## **Financials**

### **Use moving average cost on the quote**

When configured Pulse will use the moving average cost of stock for quoting.

### **WIP Import**

There is a WIP import to be used when importing costs to open jobs.

### **Invoices Always Raised Against Top Level Client**

If required Pulse can be set to always raise invoices against the top level client. For example, a quote and job can be raised against a branch, but the invoice against head office.

### **Inter-project journals**

Add Project to advanced GL Journals

### **The payment method can be set on a posted invoice.**

The payment method can be set on a posted invoice.

### **Show/Hide Contract Hide Inclusive Amount**

Show/Hide Contract Hide Inclusive Amount on Client contract financials

### **Allow type of contracted catalogue item on any PO**

When Pulse is set to enforce purchasing stock from a specific supplier, a type can be set to be available from all suppliers. So you can put courier delivery from a specific courier onto the PO for an equipment supplier.

**Lock Description on PO when a Stock Item**

The description on the PO can be locked for stock items.

**Posting link on GRN Listing**

There is now a posting link available on the Stock Movement Document (GRN) listing.

**Client Stock Accounts**

It is possible to load a separate or additional list of accounts to show in the client stock account dropdown.

**Credit Note and Invoice Cannot be "Unprinted"**

The printed checkbox is now disabled once checked on invoices and credit notes, in keeping with legal requirements.

## **Projects**

### **Project Takeon**

We built a basic project takeon function

### **Create Revenue Revaluation Journal**

Config to indicate if the Make Revenue Revaluation Journal is visible on the Project Transaction list Interface

## **Inventory**



### **Stock Movement Document Reversals**

Stock Movement Document Reversals are now possible for users with the correct security

### **Take on unserialised stock to consultant**

Spreadsheet imports to take on unserialised stock to consultant and client.  
For clients set Moving Average Unit Cost

### **Project job cannot consume van stock on mobile.**

Project job cannot consume van stock on mobile, Must only use stock ordered for the job specifically.

### **Purchase Order Attachments**

Purchase orders now have attachments

### **DIY Reports on Purchase Orders**

It is now possible to link to DIY reports from the supplier order interface.

### **Displays Incident Link on GRN Workflow**

Displays Incident Link on GRN Workflow

### **Stock Movement Documents Link to DIY Reports**

Stock Movement Documents Link to DIY Reports

### **Only allow ordering from a specified supplier**

If making a supplier order (PO)  
and IAllowCatalogueItemOrderingFromLinkedSupplierOnly then  
then only show cat items that have no supplier set, or cat items that have this supplier set

### **Only allow ordering from a specified supplier**

Only allow ordering from a specified supplier extended to Job and Place Order for Parts pages.

### **PO Printer Friendly When Not Approved**

We can make it possible to view the PO printer friendly when the PO is not approved.

### **Replace Label for Place Order for Parts**

If required we can change the header for the Place Order for Parts page.

### **Cost Price Group Imports**

We have built a spreadsheet import for cost price groups. This is to load contracted costs against catalogue items for specific vendors.



## Sales

**Keep history of Opportunity Assignment**

Keep history of Opportunity Assignment

## DIY Reports

**Core**