








PULSE BUSINESS SOFTWARE

Cloud-based software that drives your business.

Release Notes - Version Protea Dev (July 2024 - Aug 2024)

Highlights

- Financials**  Statement Emailing
- Financials**  Project Revenue Recognition Journals Posted
- Financials**  Auto Posting of Incident WIP to COS Journal
- Inventory**  Goods Received Note Movement Matrix
- Core**  Agent Summary DIY Report

Service

Response Searching

The ability to search for Responses on a Pulse installation is now controlled by config

Control scheduling icon visibility

The scheduling icon visibility on the Incident interface are now controlled by config

Financials

Statement Emailing

Financial Mailer now supports sending of Statements via email

Project Revenue Recognition Journals Posted

Pulse can now post project revenue recognition journals when they are created.

Auto Posting of Incident WIP to COS Journal

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DIY report pinning to System

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Bulk posting of Journals now possible

Journals can now be bulk posted

Stock Receipting

Enhancements to the Stock Receipting and Supplier Invoicing against Orders. New rules prevent you receipting more than was ordered, and then also invoicing more than what was receipted

Allow prevention of PO creation on client

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Projects

Inventory



Goods Received Note Movement Matrix

There is a new dynamic matrix that allows widely configurable whitelisting of movement types, rather than blacklisting based on requested restriction.

Purchase Order Account Categorisation

Account Categorisation now supported on the Purchase Order Interface

Sales

Core



Agent Summary DIY Report

New Agent Summary DIY Report that is pinnable to the lefttoolbar

Contact Person Made By Client Import

If no contact person is specified when importing a client via spreadsheet, Pulse will make a placeholder contact person.

Alternate Consultants on Client

If a Consultant is hidden and the relevant config is enabled, that allows for the selection of Alternate Default Consultants on a Client, then the hidden consultant checks include these Alternate fields and inform the user

Set Defaults Sales Consultant to Default Service

A new config will set the default sales consultant on a client to the default service consultant on adding and updating.