






**PULSE BUSINESS SOFTWARE**

Cloud-based software that drives your business.

## Release Notes - Version Quiver Tree Dev

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### Highlights

- Service**  Linked Invoices on Incident
- Service**  Icons for Top Level, Warehouse and Supplier Client
- Sales**  Opportunity Quick Capture Business Search

## Service



### **Linked Invoices on Incident**

Ability to display linked Invoices on the Incident interface



### **Icons for Top Level, Warehouse and Supplier Client**

Icons have been added to show clients that are warehouses, suppliers and top level (with children). This has been added to most autocomplete searches and the search results page.

### **Replace Labels for Catalogue item Cancellation**

Replace Labels for Catalogue item Cancellation

### **Gage Late collection Change**

There is a change to the Voucher Late collection at Gage. If the Rental Start Date/Time captured is before the Return Date/Time, then the Return Date/Time is set to be the same as the Rental Start Date/Time.

Please note this logic changes the return Date/Time of the Original Voucher and not the current voucher. This is how this has always worked

### **Supplier Invoice Copy**

When a Supplier Invoice is copied, it now records its Source Supplier Invoice and then displays this on the Relates To Tab

### **Supplier Model Number Search**

On the Catalogue Item listing page, you can now search for a Catalogue item based on its "Supplier Model Number"

## **CDC Reporting**

Improvements to CDC auditing

## **Show linked Project on Goods Received Note**

Show linked Project on Goods Received Note

## **Financials**

### **SQL-based Supplier Order Status List**

We have made the statuses available on the purchase order much more configurable. For example, statuses can be limited to certain people.

## Projects

## Inventory

## Sales

### **Opportunity Quick Capture Business Search**

There is new functionality created in the Opportunity Quick add that allows for a configurable search to run that finds existing Clients based on the captured information. If found, they are updated, otherwise a new client is created

## **Client Portal**

### **Client Portal Config for Quote**

New replace label to allow the word quote to be configurable on the Client Portal

### **Client Portal Quote List**

If the relevant config is true on the ClientPortal, then the Existing Quote list icon is available to the User. Quote is replace labelled on the ClientPortal



## **Core**

### **Ticket Groups Link to Ticket They Were Made From**

If you make a Ticket Group from a Ticket then the new group will link back to the ticket it was made from. This allows for more powerful reporting and dashboards.

Where possible historical links have been created.

### **Client Search Results**

On the client search results page, there is now a new filter that allows one to Filter per specific Client Role.