# Pulse Release Notes – 14.10

## Watershed Items

**Watershed items are the most important changes in the release. They are indicated in the release notes by a gold star**

**Service**

- New client columns and functionality available in the SRList
- Change to assignment of Teams and Consultants on new Service Requests

## Service

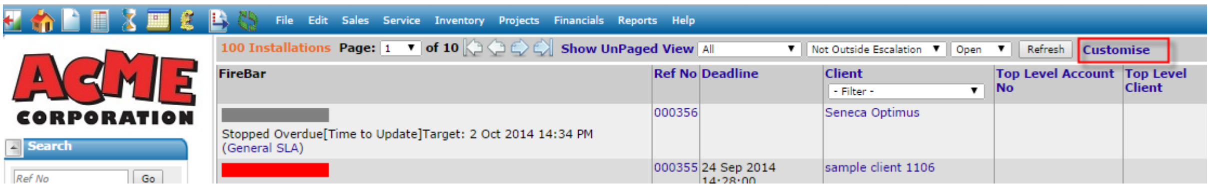
### New client columns and functionality available in the SRList

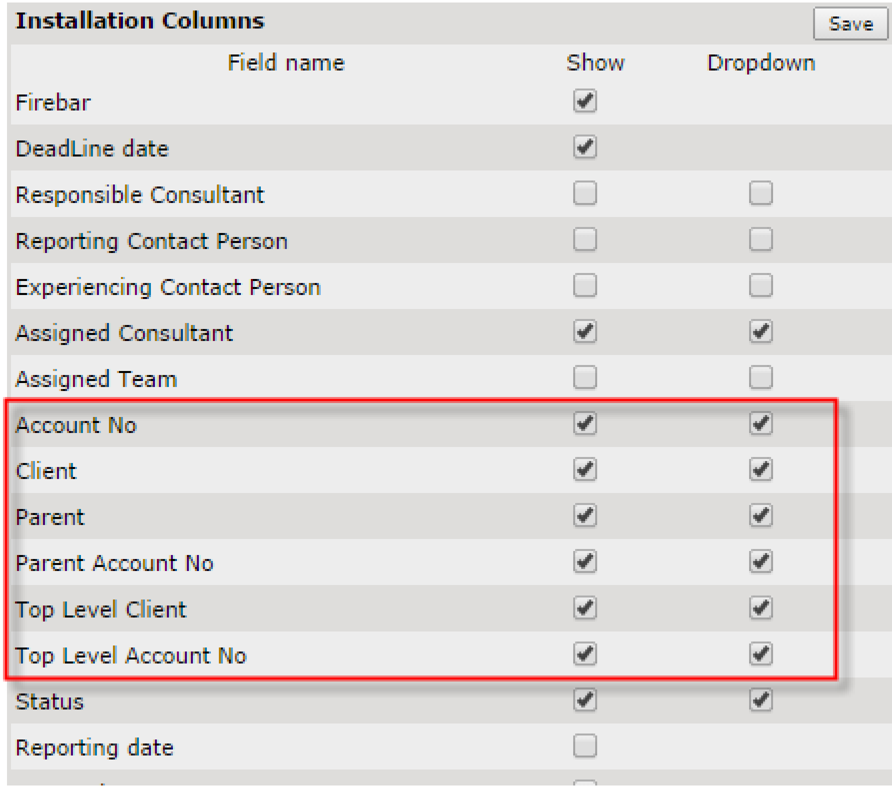
Four new columns are available on the SRList:
Parent Client, Parent Client Account Number, Top-Level Client and Top-Level Client Account Number

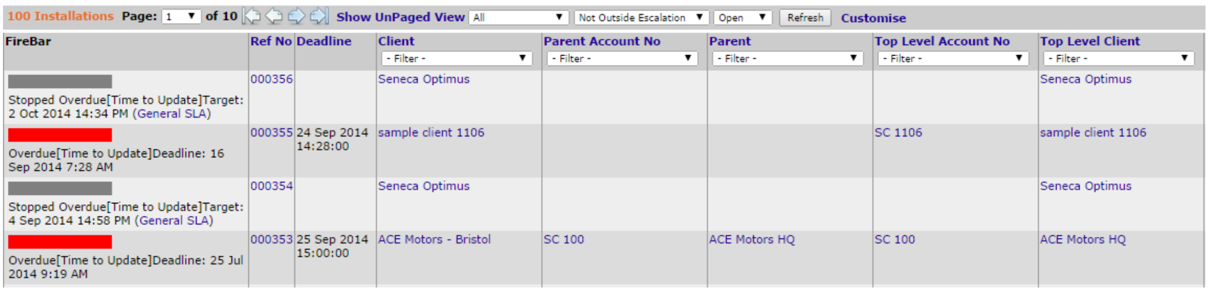
To add them click “Customise” at the top of any SRList in Pulse.

These are all sortable and filterable.

Additionally, we have made it possible to hide the Client Account Number column.



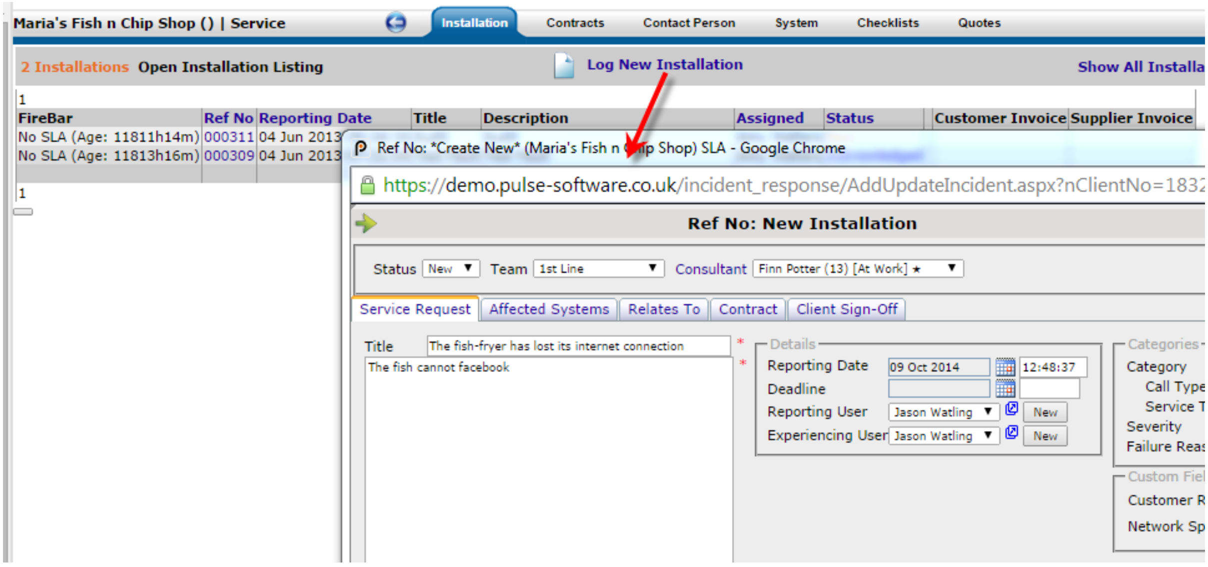



**Change to assignment of Teams and Consultants on new Service Requests**
We have clarified and simplified the way that Pulse decides which Team and Consultant a new Service Request should be assigned to.

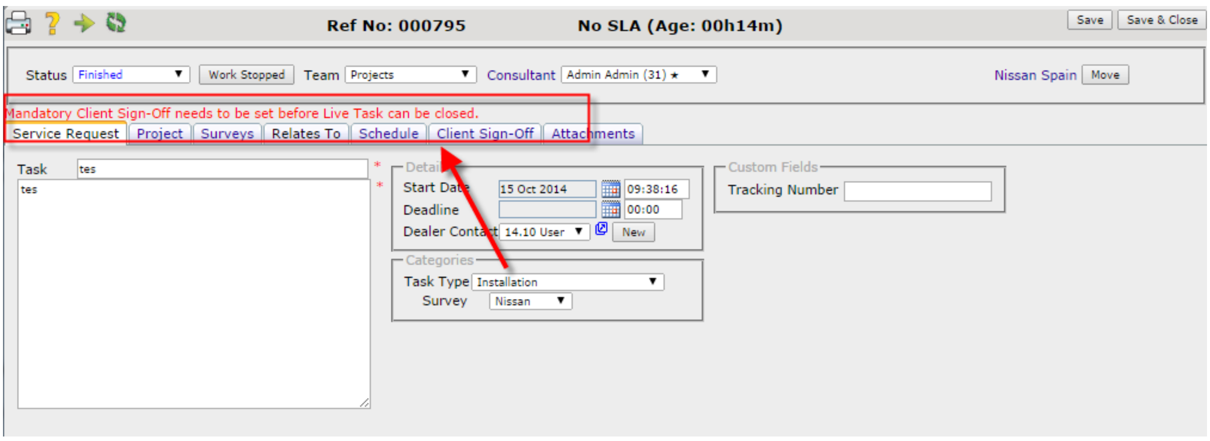
The default behaviour is to assign it to the default service consultant and team on the client. Alternatively it can be set to assign it to the logged in Consultant, and the logged in Consultant's main team.

Please contact us if you would like clarity on the above, as assignment is an important usability feature in Pulse.




**Prevent closing a Service Request until the One Time Pin Sign-off is received**
It is possible to configure Pulse to require an OTP to be entered before SR's with configured categorisations can be closed. This can be over-ridden by users of a particular clearance level.

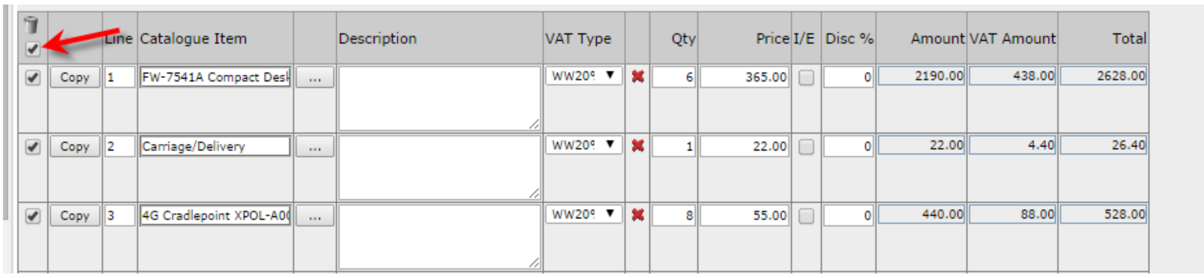
Please contact us if you are interested in setting this up on you Pulse installation.



## Financials

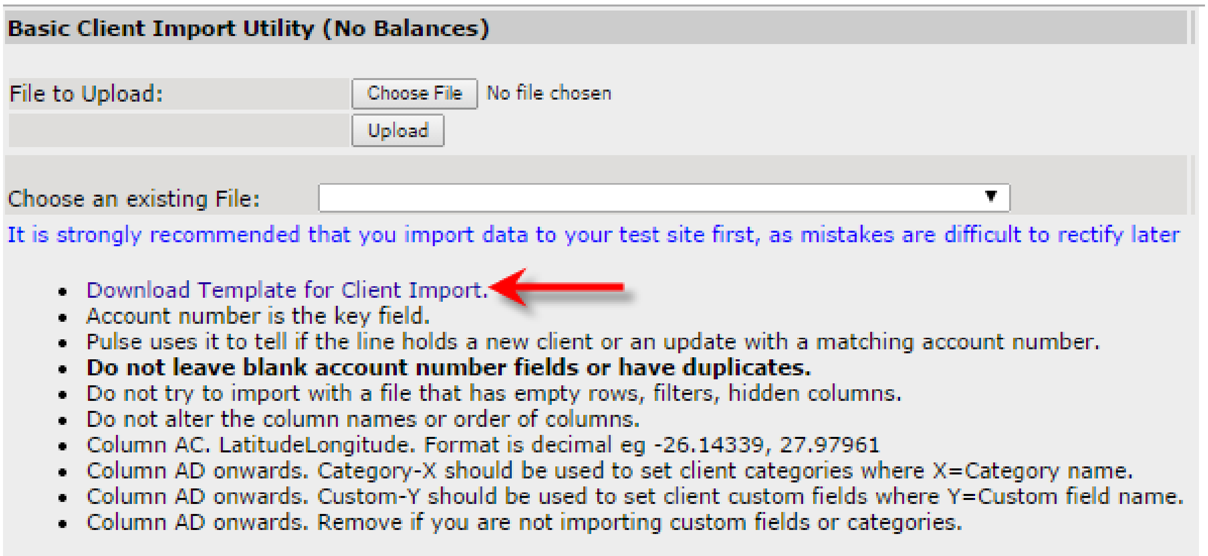
**Select multiple line items for deletion at once in the Purchase Order**

It is now possible to select all line items for deletion in the Purchase Order. You can deselect the few that should remain after selecting them all with a single click.



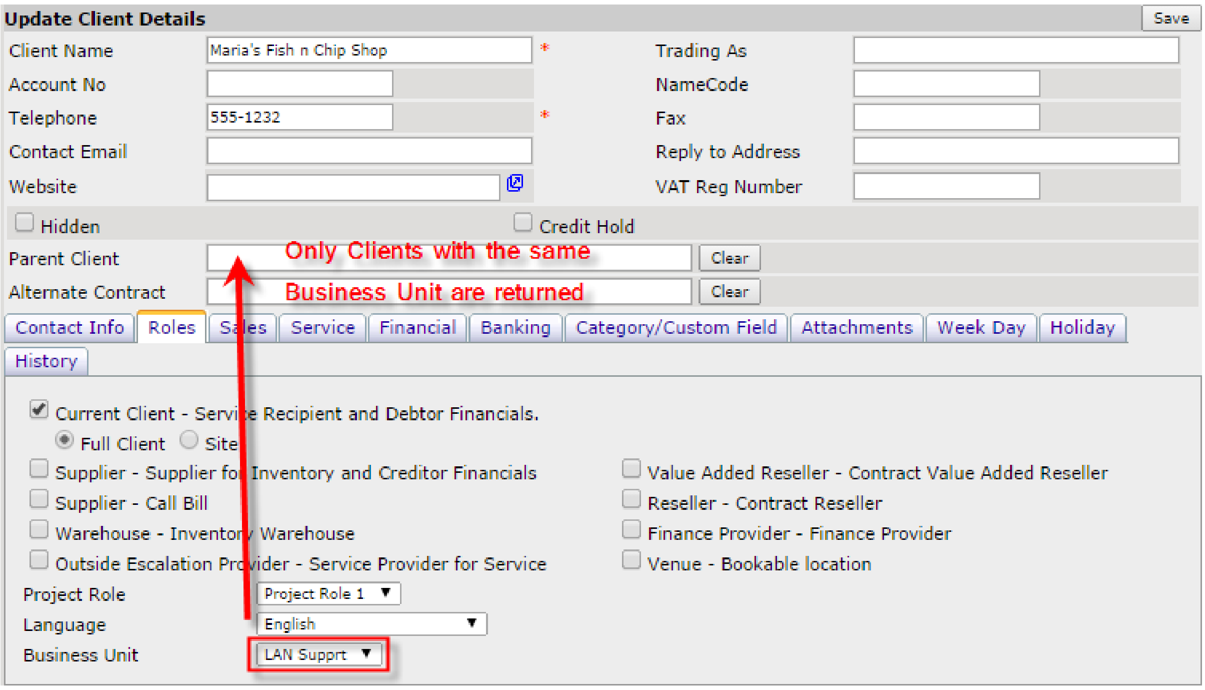

**Business Unit included on Client Import Spreadsheet**

The client import now includes a field for the Business Unit. Download the import spreadsheet from Pulse and use it to import new Clients with their Business Units. Pulse will generate the correct client for the client, based on the Business Unit definition.



**Business Unit restrictions on Child / Parent clients**

When setting the parent client Pulse will filter the parent selection by the Business Unit of the child (if the child has a Business Unit).



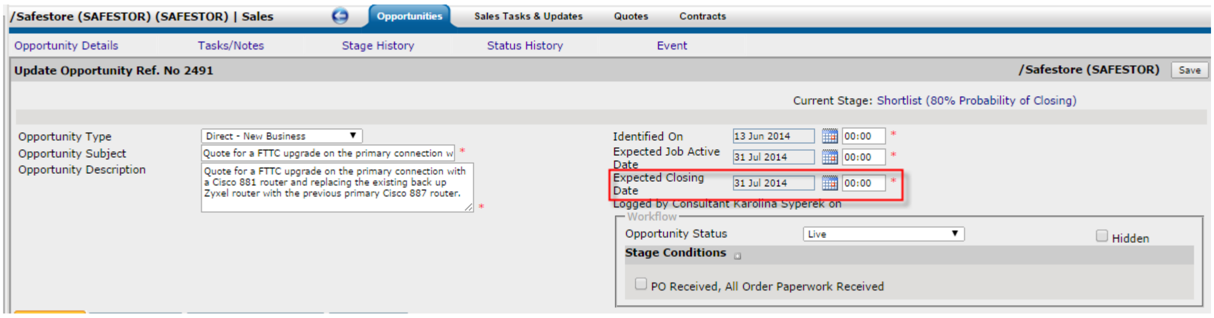
## Inventory

**Prevent moving of van stock to Consultants**
Please talk to us if you'd like to limit moving van stock to consultants based on clearance level settings.  For instance, you may want only engineers to be able to have van stock, and finanancial users to be removed from the stock movement selections.

## Sales

**The Expected Closing Date can be mandatory on existing Opportunities**
We have made it possible for the expected closing date to be mandatory on existing Opportunities. It will not be mandatory on the first creation of the Opportunity.

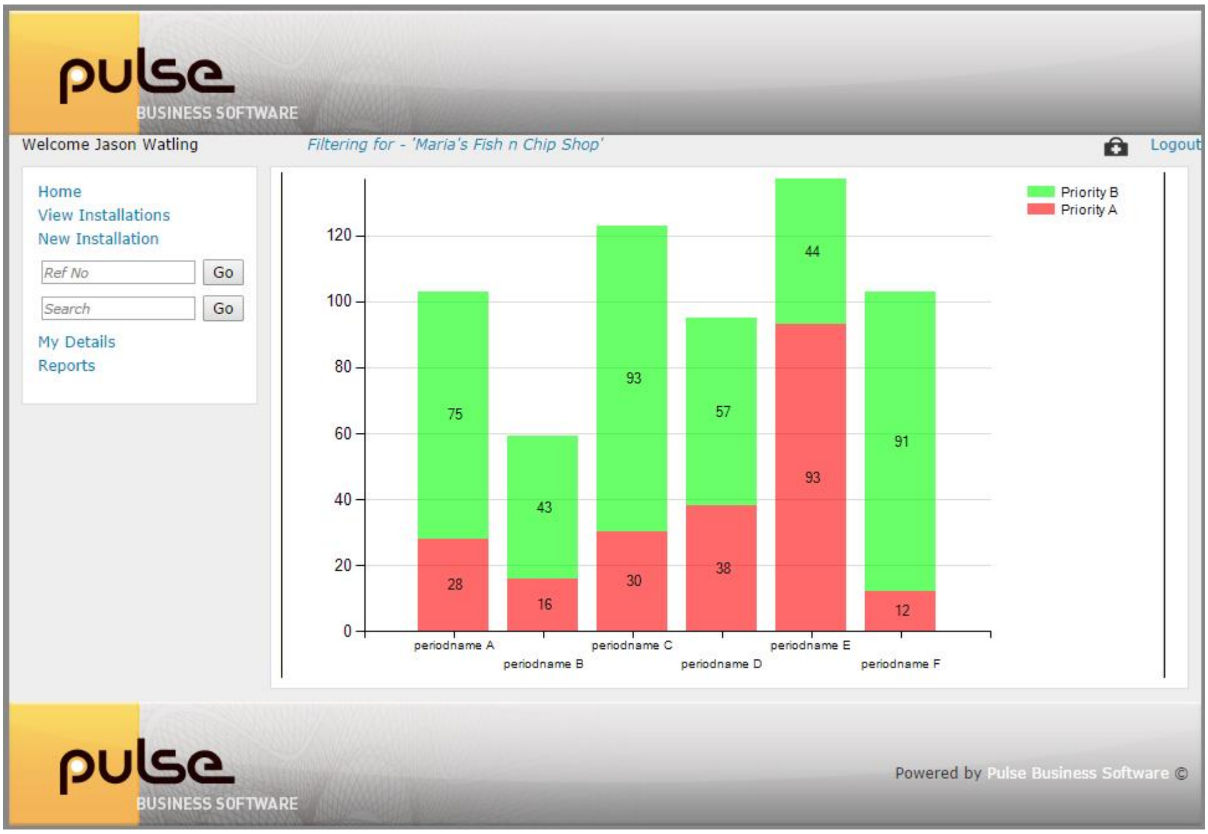
Let us know if you'd like this to be activated on your installation.



## Client Portal

**Drill-downs now available in Reports**

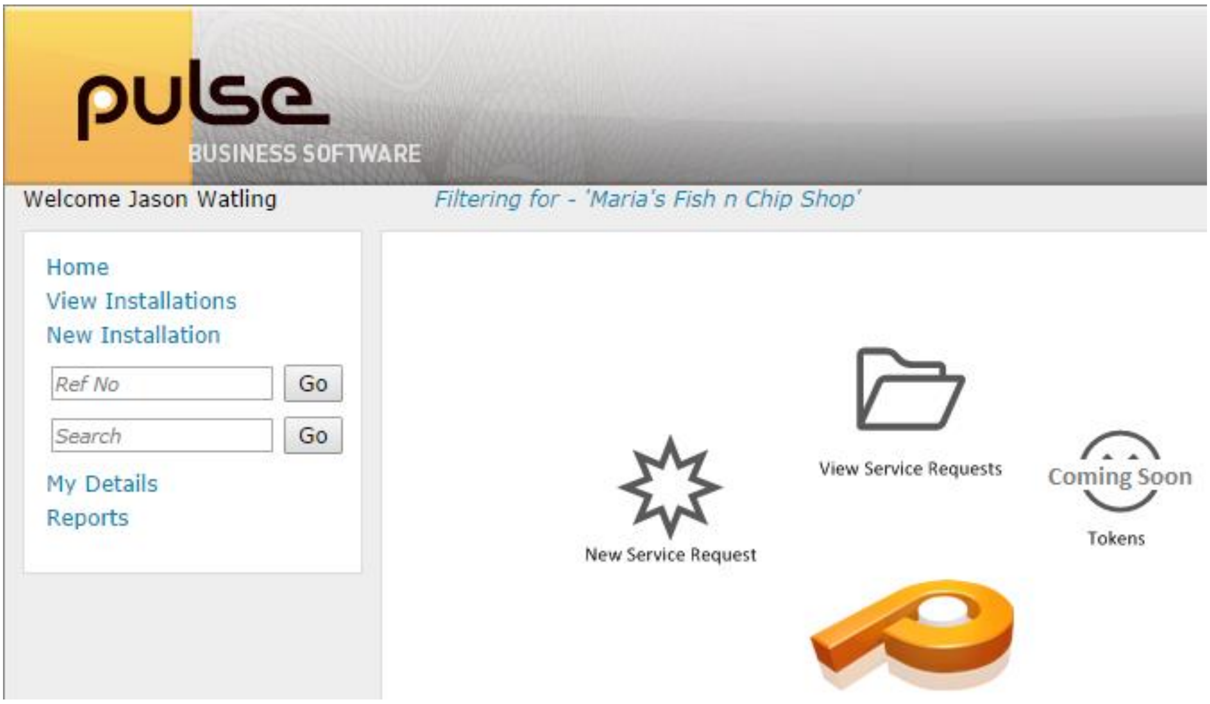
Reports on the client portal now support drill downs.   For instance, the below report can support drilldowns for each priority per period, if required.

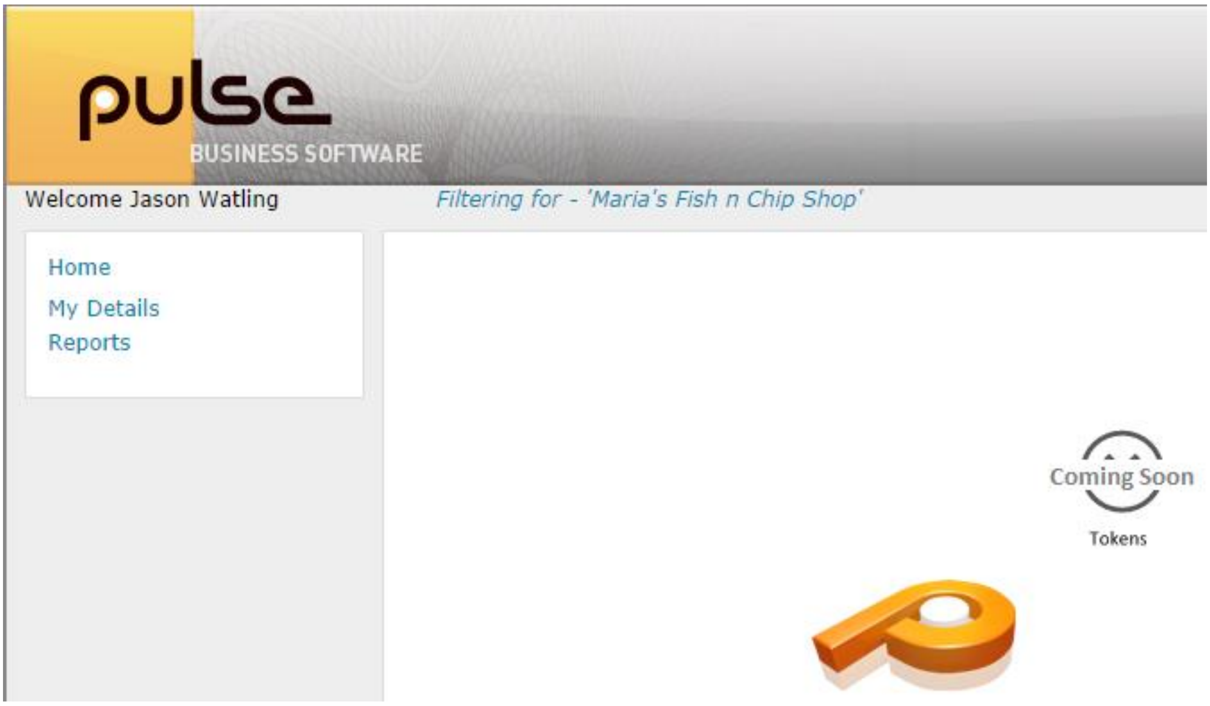


**Ability to hide Service Request functionality**

It is possible to remove various parts of Service Request functionality from the client portal. This is useful, for instance, if you are using it merely as a means to provide reporting to your customers.

Log, View and Search functionality enabled vs removed:



Response functionality enabled vs removed: