

MoversSuite

Reference Guide

Product Update 4.4

Enhancements and fixes to MoversSuite

Product Update 4.4

Version 4.4 (Fall 2011)

Build 4.4.0.32376

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Table of Contents

WHAT'S NEW IN MOVERSSUITE	4
GENERAL RELEASE NOTICES	4
ENHANCEMENTS AT VERSION 4.1	5
Agent Percentage by Authority	5
AR Branch on Transactions	5
Clear and Decline Multiple Services at a Time	6
Customer on Revenue Import	6
Customer on Transactions	7
Default Authority	7
Email Added to Sales Lead Screen	7
Multiple-Select Claim Items	9
Quotes to Go Upload	9
Reductions Updates	10
Support of Microsoft Dynamics GP 2010	11
TransDocs Upload Supports PDF Documents	11
FIXES AT VERSION 4.1	12
Account Profile Fixes	12
Claims Fixes	12
Customer Statements Fixes	12
Document Management Fixes	12
Dynamics GP Inquiry Fixes	12
General Fixes	13
International Orders Fixes	13
Invoicing Fixes	13
Local Dispatch Fixes	14
Long Distance Dispatch Fixes	14
Military/Government Fixes	14
Order Information Fixes	14
Payment Management Fixes	14
Quote Fixes	15
Reporting Fixes	15
Revenue Entry Fixes	15
SIRVA Integration Fixes	15
SIT/Recurring Billing Fixes	15
Tasks Fixes	16
UniGroup Integration Fixes	16
ADMINISTRATIVE UPDATES	17
BUG FIXES RELEASES AND PATCH INFORMATION FOR 4.1	18

What's New in MoversSuite

This document lists the changes made to MoversSuite software for the Fall 2011 release.

Contact your Professional Support representative for information specific to loading this version of MoversSuite, or contact Sales and Marketing for purchasing and additional information on related products and services.

General Release Notices

Microsoft .NET Framework 4 is required for this release. Download this version from the [.NET Framework Developer Center](#).

See [System Requirements](#) and [Hardware Requirements](#) for more information.

Enhancements at Version 4.4

Version 4.4 of MoversSuite (build 4.4.0.32376) includes the following enhancements.

Agent Percentage by Authority

Agent percentage now based on authority of the order. Prior to this release, agent percentage was based on the associated **Item Code**.

AR Branch on Transactions

We exposed the **AR Branch** to users through **Transactions** and through **Recurring Billing**. Previously, the application set the **AR Branch** internally based on the authority of an order. Now users can see what the application computes for the **AR Branch** and, with appropriate security, override it for each transaction.

For own authority orders, the application will default the **AR Branch** to the branch set for the order. For van line authority orders, the default is the branch receiving the revenue.

Division identification is based on the branch receiving revenue. Therefore **Division** fields have been replaced by **Revenue Branch** (displays as *Branch* or *Revenue Branch*) where needed.

The screenshot shows the 'Edit Revenue Item' window. At the top, it displays 'Revenue Group: Transportation', 'Percentage: 5%', and 'Amount: \$3,574.27'. Below this is the 'Allocation Information' section, which contains several fields: 'Revenue Branch' (407), 'AR Branch' (1623, highlighted with a red arrow), 'Customer' (Corp Payment System), 'Service' (5), 'Invoice Description' (Booking Agent Commission), and 'Work Ticket'. There are also checkboxes for 'By Name' and 'Invoice'.

Figure 1: Edit Revenue Item screen

CHANGE DETAILS

AR Branch setting is available in the following locations:

- Add Allocation Item
- Add Revenue Item
- Add Billing Item

Revenue Branch field replaces **Branch** in the same locations as the **AR Branch** field (above)

Division field will not display in the **Order Information (Revenue Entry)** tab unless **Divisions** is on.

Branch field replaces **Agent** and/or **Division** in the following:

- Add Allocation Item
- Add Distribution Item
- Add Revenue Group
- Add Revenue Item
- Transactions

Added **Branch** column to **Dynamics GP Order Inquiry** screen

Recurring Billing AR Branch is a new security module that controls access to **AR Branch** field within Recurring Billing. **Note:** Single branch setup enables access for all branches. See **Recurring Billing Setup and Administration** for details.

Revenue Entry AR Branch is a new security module that controls access to **AR Branch** field within Revenue Entry. **Note:** Single branch setup enables access for all branches. See **Revenue Entry Setup and Administration** for details.

Clear and Decline Multiple Services at a Time

Users now have the ability to clear and decline multiple services from different orders and dates at one time within **Requested Services** in **Local Dispatch**.

Customer on Revenue Import

Users can now specify a customer to import the revenue for within **Import Agent Revenue**. This change is useful when some imported revenue requires separate billing. For example, if an account is paying for the move but the shipper needs to be billed for SIT, a user can process a partial import for the move with the account as the customer and then process another partial import of SIT with the shipper as the customer.

CHANGE DETAILS

Renamed **Import Revenue** to **Import Agent Revenue**

Added **Bill To Customer** section to **Import Agent Revenue**; **Customer** is a required field

Customer Number assigned to each imported revenue item

Customer on Transactions

The customer is now associated to each revenue item. Users will now see the **Customer** field in place of **Alternate Bill To**. This is now a required field and will default to the customer set for the order.

CHANGE DETAILS

Renamed **Alternate Bill To** field to **Customer** and made field a required setting within the following:

[Add Revenue Item](#)

[Add Billing Item](#)

Note:

Users with “Full Access” to the **Revenue Entry** security module can override the **Customer** field (see [Security Modules](#) for more information).

Default Authority

A default **Authority** is now set for all orders booked in MoversSuite. For van line authority moves, the van line determines the authority. For own authority moves, the default is the local authority of the booking branch. See [Move Information](#) for details on the **Authority** field.

Orders created through a UniGroup download default the authority based on the authority flag included in the download.

UniGroup Rating Order

Orders created through a Rating Send will base the authority on the agent authority flag (mstr_agent_authority) included in the send. If this value is “N”, then the authority of the order will be that associated to the van line ([Van Line Setup](#)). If the flag is “Y”, use the authority of the branch assigned to the order. See [UniGroup Rating Order Download](#) for more information.

UniGroup Registration

When a registration download creates a MoversSuite order, the authority will default to that associated to the van line of the order ([Van Line Setup](#)). See [UniGroup Registration Downloads](#) for more information.

Email Added to Sales Lead Screen

An **Email** address for the shipper has been added to the [Sales Lead Information](#) screen; this field corresponds to the **Moving To Email** visible within [Name, Address, Phone](#).

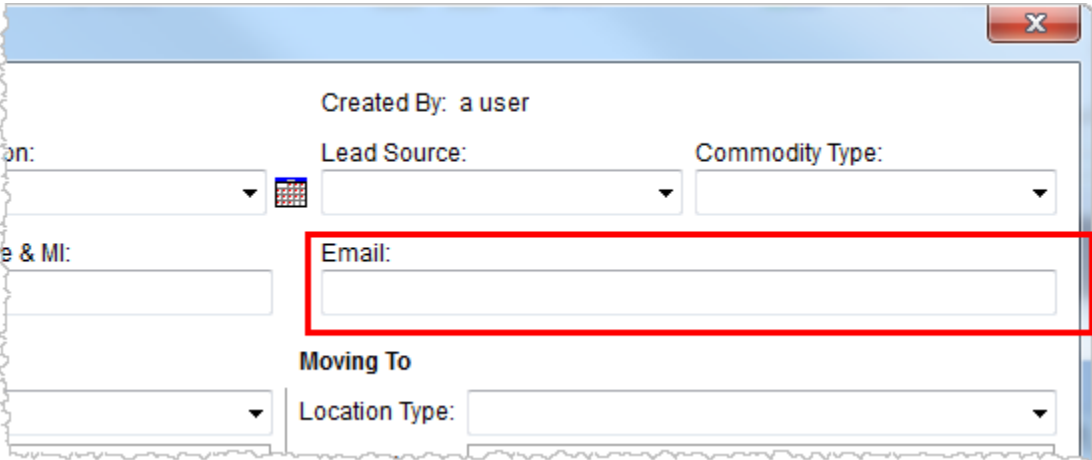


Figure 2: Sales Lead Information screen

Users can now select and copy the **Notes** entered within the **Sales Lead Information** screen.

Multiple-Select Claim Items

Users can select multiple **Claim Items** record and change the status; the change is applied to all selected records.

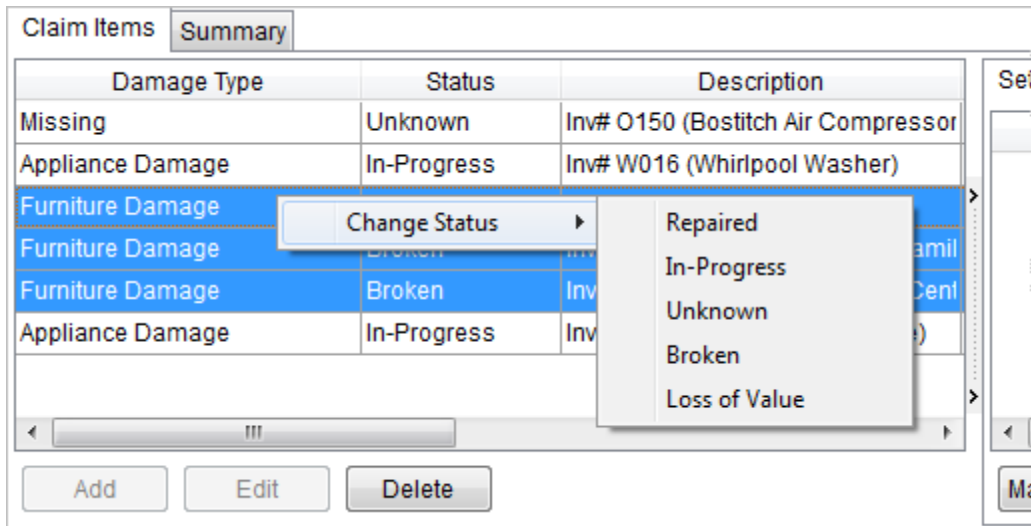


Figure 3: Claim Items section in Claims

Quotes to Go Upload

[WATCH VIDEO: Quotes to Go Upload](#) (requires Flash)

The **Quotes to Go Upload** is an integrated system to send lead information directly from MoversSuite to UniGroup Quotes to Go system.

See [UniGroup Quotes to Go Upload](#) for more information.

Reductions Updates

We updated the **Reductions** screen to make it easier to use and easier to identify pertinent reduction information for each record.

Figure 4: Reductions screen

Additionally, we corrected the way allocated items were calculated, specifically reductions on allocated revenue items (e.g. “Transportation”) that are based on **Gross Amount** or **Invoice Amount**.

Net reductions were also not working as expected. “Net” now includes “Include Reductions” allowing a user to reduce the amount of a reduction calculated by including other reductions belonging to the revenue item.

CHANGE DETAILS

Completely redesigned **Reductions** screen including at-a-glance computation of the reduction and easy to use layout. Screen has new **Include Reduction** option allowing a reduction to be reduced by others set for the item.

Reduction Basis now includes the following:

- Gross Amount**
- Invoice Amount**

The following for allocated items:

- Allocated Amount**
- Group Gross Amount**
- Group Invoice Amount**

See [Reductions](#) for **Basis** field value descriptions.

Support of Microsoft Dynamics GP 2010

MoversSuite Version 4.1 now supports Microsoft Dynamics GP 2010 R2. MoversSuite will also remain compatible with GP 10.

TransDocs Upload Supports PDF Documents

TransDocs upload now supports TIFF and PDF document. Previously, only TIFF was supported.

Fixes at Version 4.4

Version 4.4 of MoversSuite (build 4.4.0.32376) includes the following fixes.

Account Profile Fixes

Branch of the order must match one of the branches assigned to the employee before they can be assigned to the order when applying an [Account Profile](#). Prior to this release, branch assignment was ignored when an [Account Profile](#) was assigned to an order.

Claims Fixes

[Military Information](#) screen was displaying the incorrect **Origin** and **Destination** bases.

Note:

Access this screen is through the [Military Information](#) button within the [Claim Detail](#) screen.

Customer Statements Fixes

An issue where no **Invoice Header** and **Payment Remittance** data would appear if the **Default Branch** of the user references a branch with no **Contact information** has been corrected.

Refer to [Customer Statements](#), [Generate Statement](#), [Branch Setup](#), and [Personnel Setup](#) for more information.

Document Management Fixes

The [Document Management Viewer](#) no longer produces an error when attempting to load documents for an order that with more than two segments associated to it.

The [Document Management Viewer](#) now switches to view the most recently attached document uploaded by the user.

Dynamics GP Inquiry Fixes

Branch column added to the data grid in both **Document** and **Distribution** tabs in [Dynamics GP Order Inquiry](#).

Original Amount	Item ...	Balance	Journal ...	Documen...	Branch	Document Type
+ Module : AP						
\$6,083.24		\$0.00				
- Module : AR						
(\$229.63)	59 - Unpack	\$0.00	5/20/2008	FYMS-12-08	1623	Credit Memo
\$915.11	120 - 3Rd F	\$0.00	5/20/2008	FYMS-12-08	1623	Invoice
(\$915.11)	120 - 3Rd F	(\$240.63)	5/20/2008	FYMS-12-08	1623	Credit Memo

Figure 5: Dynamics GP Order Inquiry screen

General Fixes

Hotkeys assigned to all screen functions throughout the application.

Note:

Hotkeys evoke a named function through the use of the **Alt** key in combination with an underlined letter; see [Hotkeys](#) for more information.

The **Esc** key works as a “cancel” function in many screens, such as in the [Add Note](#) dialog.

Changed several button references from “OK” to “Save” to better reflect the functionality that is taking place

Fixed the hotkeys in the [Resources](#) screen

An issue with the **OA Surveyor** calendar option not appearing in [Agents](#) has been fixed.

International Orders Fixes

Renamed the Container/Liftvan/Airbox Information to [Container/Lift Van/Airbox Information](#).

Labels were not reverting back correctly when user switched **Transport Mode** between “Air” and “Sea” types and then cancelled the edit within [Shipping Information](#).

Invoicing Fixes

An issue where not all available revenue was displaying in the left selection grid in New Complete Invoice and New Supplemental Invoice has been fixed. See [Invoicing](#) for more information.

Local Dispatch Fixes

An issue where a user double-clicks on crew or equipment column headings automatically assigned the top record displayed in the grid has been fixed.

Long Distance Dispatch Fixes

An issue where a new trip created through the right-click option of **Change Trip (Alt+C)** from within the **Current Driver Activity** tab disappears has been fixed.

Military/Government Fixes

The text of the tool tips for buttons to access the **Carrier Information** and Base Information in **Bases** section of **Military/Government** has been set.

Order Information Fixes

Order numbers are no longer allowed certain characters that have the potential to cause problems elsewhere in MoversSuite or through an interfacing application.

Note:

This applies to the POS portion of the Order Number as well.

Valid characters for use in the Order Number include the following:

Character(s)	Description
a-z	All lowercase letters from 'a' to 'z' are accepted.
A-Z	All lowercase letters from 'A' to 'Z' are accepted.
-	A hyphen is accepted.

Replaced the word “post” with “Save” in the message a user would receive if they attempted a **Go To a Related Order** when in edit mode. See **Move Information** for details.

The order set for **Related Order** now appears within the list of recent orders for the user (see **Quick Find**).

Payment Management Fixes

The **Apply Wizard** was incorrectly displaying branches with no posted revenue.

Quote Fixes

An ampersand ('&') in the **Service Provider** for **Claim Items** was displaying as an underscore ('_'). See [Add Quote](#) for field information.

Reporting Fixes

An issue with the user being unable to save, print, or email from within the **Report Viewer** has been fixed. This occurred when running **Reporting Services 2008 R2**.

MS Order Transactions report was producing a “sub report cannot be shown” error.

Revenue Entry Fixes

Fixed a condition in the BAT process that produced a 1041 error

Removed a duplicate hotkey for that existed for **Alt+E**

The **Save & New** option was restricting user access to enter **Gross Charges** or an **Invoice Amount** directly within [Add Revenue Item](#).

An issue with the name of the **Vendor** not displaying after the user selected a record using the [Vendor Find](#) has been corrected. Refer to [Add Third Party Item](#) for more information.

Data for the last order accessed in **Revenue Entry** was not being saved upon shutdown.

Corrected a problem where the system hangs after a user clicks **Save** in Edit Revenue Commission (see [Add Revenue Commission](#)).

We added the **Shipment Type** field to the [Order Information \(Revenue Entry\)](#) tab

Edit Commission locking issue has been fixed (3669).

SIRVA Integration Fixes

The country code from SIRVA was causing download failures since it contains more data than the MoversSuite **Country Code** allows. The country code was removed from the download process since it's not needed.

SIT/Recurring Billing Fixes

Users can now sort by column heading when making a selection within the **Stored at** field within the [SIT](#)

Information screen.

An issue has been fixed where users with read only access to **Recurring Billing** were unable view storage items.

A billing item is links to a billing run that is in an error state, the application disabled the **View** buttons in **Billing Items** and the **New** button to create a new **Billing Record**. The application was modified to not disable these two functions when associated to a billing run in error.

Tasks Fixes

Users can now customize all data columns within **Tasks**, e.g. select “(All)”, “(Custom...)”, or specific records, etc.

UniGroup Integration Fixes

Net reductions from a rating send now import as an **Invoice Amount**; due to the van line computing the net reduction as gross amount less discounts, i.e. the invoiced amount.

Administrative Updates

This section highlights the changes that specifically affect the administrative settings of the MoversSuite application.

No changes made for this release.

Bug Fixes Releases and Patch Information for 4.4

This section includes information on bugs fix release and patches that have been built upon the general release of version 4.4 of MoversSuite.

No bug fix releases and patch information exist at this time.