

# MoversSuite

by **EWS**

## MoversSuite Version 2024.16

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### Version 2024.16 Notices



If you have resources that interact with Azure services and still use TLS 1.1 or earlier, transition them to TLS 1.2 or later by 31 October 2024.

Azure is turning off all TLS 1.0 and TLS1.1 support on Oct 31, 2024, which means that older servers and clients that interact with any Azure resource via HTTPS, will be required to use TLS 1.2 starting on Oct 31, 2024. This is a Microsoft enforced decision.

### Version 2024.16 Summary

The following table contains the counts of the following items related to this release, as well as Year-to-Date totals.

#	Change Summary	YTD #
	New Product Feature	10
3	Release Enhancement	39
3	Release Fix	45
2	Schema Change (tables affected)	16
1	Admin Changes	14
	Standard Reports Affected	0

### Release Hyperlinks:

[Printable Release Notes](#)

[System Requirements](#)

[Release Highlights](#)

## Other Hyperlinks:

[Open the Online Support Page](#)

[Access our Product Feedback Site](#)

## Documentation Changes

This section features the topic name changes affected within the Online Help at this release.

**NO DOCUMENTATION CHANGES WITH THIS RELEASE.**

## New Video

This section features the new video available within the Online Help at this release.

**NO NEW VIDEOS WITH THIS RELEASE.**

Find all the latest videos through our [Training Center](#).

# Version 2024.16 MoversSuite

This section lists the features, enhancements, and fixes added to MoversSuite and MoversSuite integrations.

## CSI Pay Integration ENHANCEMENT

**Card Type is shown within Cash Receipts.**

CSI Pay now provides the card type on sales transactions. The card type will show as Credit Card, Bank Checking, or Bank Savings on all [Cash Receipts](#).

### RELATED INFORMATION:

[Electronic and Online Payments](#)

**INTERNAL REFERENCE: MOV-7228**

## Atlas Integration / Billing Information ENHANCEMENT

**Client and Sub Account fields have been added to Billing Information.**

Two new fields were added to identify the sub-client and sub-account for an account associated to an Atlas order. This information is needed to assist in billing.

These fields are located within the *National Account* section of the [Billing Information](#) tab in MoversSuite.

Notes	User Defined Fields	Account Profile
Agents	SIT/Recurring Billing	Billing Information
<b>National Account</b>		
Account:	PENINSULA SCIENCES	<input type="checkbox"/> By Number
Name:	PENINSULA SCIENCES	Client ID: PenSci
Contact:		Sub Account: Lab2
Phone:		Ext:      Loc Num:
Address:		

Figure 1: Client ID and Sub Account are set on the National Account section of this order within Billing Information.

Imports from Atlas will populate the new Client and Sub Account fields using the following references:

- Reference Type CLI to populate "Client ID"

- Reference Type of SUBACT will populate “Sub Account”

In addition to the data coming down from an Atlas Order Download, the defaults can be set within [Account Setup](#). See [Version 2024.16 MoversSuite Administration > Account Setup](#) for information on these new two fields or see [Account Setup](#).

Note that you can update the Client and Sub Account fields within the Billing Information. This data is saved to that particular order (and does not affect any default that may be assigned within [Account Setup](#)).

Tables were updated to support this change. Refer to the [Version 2024.16 Database Changes](#) for details.

**INTERNAL REFERENCE: MOV-5886**

## Atlas Integration BUG

**Ignore Error 2037.**

Error 2037 occurs when a hauling record does not contain driver information. Before this fix, the error would prevent any other data from being imported, including military data. With this fix, the error still appears but users are allowed to continue with processing the next import section.

**INTERNAL REFERENCE: MOV-7192**

## Reductions BUG

**Reductions had a minor bug.**

[Reductions](#) on allocated item within Revenue Group automatically recalculate upon any change within the [Add Allocation Item](#) function within the [Add Revenue Group](#) screen.

**INTERNAL REFERENCE: MOV-7204**

# Version 2024.16 MoversSuite Administration

This section lists the improvements made within [MoversSuite Administration](#) - also known as the [Admin Tool](#).

## Account Setup ENHANCEMENT

**With Account Setup, two new fields are available: Default Client ID and Default Sub Account fields.**

Once set with [Account Setup](#), the “Default Client ID” and “Default Sub Account” settings will auto-populate within MoversSuite > [Billing Information](#) tab > the National Account section. These fields were requested by Atlas agents to support their billing processes; however, the fields are available to everyone.

PENINSULA SCIENCES (04880002)	
General	User Defined Labels
Account Number	Account Name
04880002	PENINSULA PACKAGING
Branch	Default Billing Location Number
EWS Group Moving & Storage (1623)	
Default Client ID	Default Sub Account
PenSci	Lab2
Department Agency	Bureau Service

Figure 2: An Account Setup record with “Default Client ID” and “Default Sub Account” set on that Account record.

See [Version 2024.16 MoversSuite](#) > Atlas Integration for details on these new fields within MoversSuite.

Refer to the [Atlas Integration](#) and [Billing Information](#) topics for usage more information.

Tables were updated to support this change. Refer to the [Version 2024.16 Database Changes](#) for details.

**INTERNAL REFERENCE: MOV-5886**

## Account Profile Setup BUG

**The ability to add more than one email address was incorrectly disabled during a recent change within this setup.**

Logic added during to a previous enhancement disabled the ability to add more than one email address to an [Account Profile Setup](#) record. This functionality has been restored. As a reminder, separate email addresses with a comma (Figure 3) or a semi-colon. If commas and semi-colons are not used, both email addresses will be ignored.

The screenshot shows a web application window titled "Edit Account Profile Contact". The window contains several input fields and a "Contact" section. The "Email" field is highlighted with an orange border and contains the text "chobb@tigerfastmovers.com,calvin@downhillsledding.com". Other fields include "Title", "Phone Number" (with area code and extension), "Contact Address", "City", "State", "Country" (set to "United States of America"), and "Postal Code". The "Contact" section includes fields for "Contact" (Calvin Hobb), "County", "Fax Number", and "Mobile Number". At the bottom right, there are buttons for "Save", "Cancel", "Duplicate", and "Delete".

Figure 3: Two email addresses on an Account Profile Contact.

**INTERNAL REFERENCE:** MOV-7219

# Version 2024.16 MSWeb

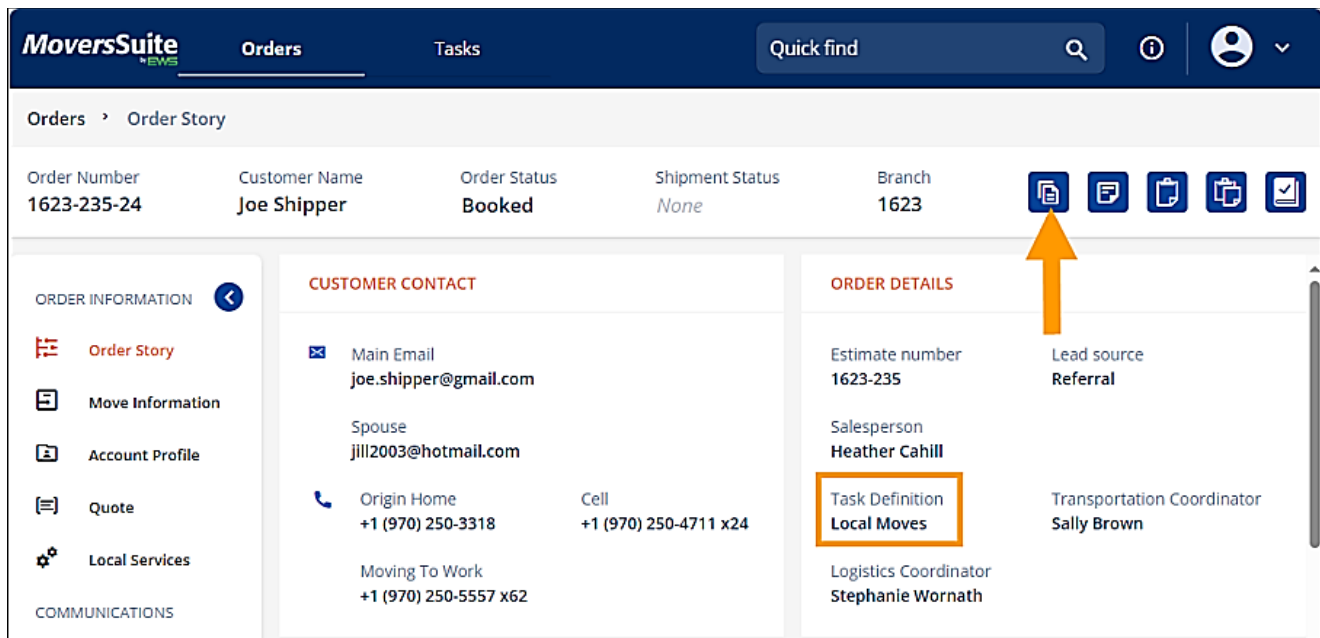
This section lists the features, enhancements, and fixes made to MSWeb.

## Tasks ENHANCEMENT

**Tasks based on the “Dependency Dates” of “Document Received” is active when adding documents within MSWeb.**

Tasks based on “Documents Received” within **Tasks Setup** were reflected within MSWeb for documents added within MoversSuite; however, now this functionality is available within MSWeb. Add Documents within MSWeb by clicking the button indicated by the arrow in Figure 4.

As an example, a Bill of Lading document was added within MSWeb. Note, the Task Definition is set to Local Moves on the order (Figure 4).



The screenshot displays the MoversSuite MSWeb interface for an order. The top navigation bar includes 'MoversSuite', 'Orders', 'Tasks', and a 'Quick find' search bar. The main content area shows order details for Order Number 1623-235-24, Customer Name Joe Shipper, Order Status Booked, Shipment Status None, and Branch 1623. A row of icons is visible, with an orange arrow pointing to a document icon. Below this, the 'ORDER INFORMATION' sidebar lists 'Order Story', 'Move Information', 'Account Profile', 'Quote', and 'Local Services'. The 'CUSTOMER CONTACT' section shows Main Email (joe.shipper@gmail.com), Spouse (jill2003@hotmail.com), Origin Home (+1 (970) 250-3318), Cell (+1 (970) 250-4711 x24), and Moving To Work (+1 (970) 250-5557 x62). The 'ORDER DETAILS' section includes Estimate number 1623-235, Lead source Referral, Salesperson Heather Cahill, Task Definition Local Moves (highlighted with an orange box), Transportation Coordinator Sally Brown, and Logistics Coordinator Stephanie Wornath.

Figure 4: Click this button to add documents from within MSWeb.

A **Tasks Setup** record (Figure 5) is already set for Local Moves. On this record is a task that is based on the “Dependency Date” of “Document Received.” The document received is set to document Bill of Lading, which means that when a Bill of Lading is received the “Verify BOL” task is created.

**Add Task**

Task Description: Verify BOL

Due Days: 1

Due Type: After

Responsible Role: Transportation Coordinator

Responsible User: -none-

Dependency Date: Document Received

Priority: 1 - High

Document Type: Bill of Lading

Buttons: Save, Cancel, Duplicate, Delete

Figure 5: Task was added to Local Moves Tasks Setup record indicating the Document Received is based on Bill of Lading.

Now, since the Bill of Lading was added in Figure 4, the “Verify BOL” was automatically created and lists Tasks within the Order Story.

Order Number: 1623-235-24

Customer Name: Joe Shipper

Order Status: Booked

Shipment Status: None

Branch: 1623

**ORDER INFORMATION**

- Order Story
- Move Information
- Account Profile
- Quote
- Local Services

**COMMUNICATIONS**

- Tasks

**ORDER TIMELINE**

Select what you want to see in your timeline:

Notes Documents Order Information **Tasks** Order History

Date Range: [ ] [ ]

**DUE** 07/30/2024 assigned to Sally Brown Verify BOL

Figure 6: Tasks automatically created when BOL is received.

**INTERNAL REFERENCE: MOV-7034**

# Version 2024.16 Database Changes

This section lists any database (schema) changes made in this release.

Table	Change
Accounts	Added <b>DefaultClientID</b> and <b>DefaultSubAccount</b> (30 characters each). These fields store the data entered through the Default Client ID and Default Sub Account settings within <a href="#">Account Setup</a> . The defaults show as the Client ID and Sub Account within the <i>National Account</i> section on the <a href="#">Billing Information</a> tab. This change is part of the addition of bringing in client data through the <a href="#">Atlas Integration</a> . (MOV-5886).
Orders	Added <b>AccountClientID</b> and <b>AccountSubAccount</b> (30 characters each). These fields show the data that is either set up as a default through <a href="#">Account Setup</a> or the data downloaded from Atlas through the Client (CLI) reference type. These fields show as the Client ID and Sub Account within the <i>National Account</i> section on the <a href="#">Billing Information</a> tab. This change is part of the addition of bringing in client data through the <a href="#">Atlas Integration</a> .  Note that updating the Client ID and Sub Account are saved to that specific order and do not update the data for the record within <a href="#">Account Setup</a> . (MOV-5886).

## MOVERSSUITE DATABASE SCHEMA RESOURCES:

[Tables Listing](#)

[Documents Table Listing](#)

[Data Views Listing](#)

## RELATED TOPIC:

[Schema Changes](#)

# Version 2024.16 Release Requirements

For software compatibility for this version of MoversSuite, see [Software Compatibility](#).

For all requirements, see:

[System Requirements](#)

[Hardware Requirements](#)

[Software Requirements](#)

## Recent Changes

This section lists changes to the requirements that affect this specific version of MoversSuite.

The [System Requirements](#), [Hardware Requirements](#), and [Software Requirements](#) have been updated to reflect the current versions needed for optimal security and functionality with MoversSuite.

# Version 2024.16 Known Issues

The following issues are problems that may affect your decision to upgrade to this version of MoversSuite. The following issues are not resolved for this release.

## QuickBooks Support for IE11 Deprecating for Authorization Screens (September 8, 2020)

Due to security requirements, starting Sept. 8, 2020, only Chromium-based embedded browsers will be supported for **QuickBooks Online Connection Authorization** screens and Internet Explorer 11-based embedded browsers will no longer work.

For authorization process in MoversSuite, the previous two versions of Google Chrome, Mozilla Firefox, Microsoft Edge, and Safari (11+) are supported. This is for the users who first turn the QuickBooks feature on. Or, in case, the feature is being used after a long while. Refer to [this blog](#) for further details on changes made.

## Supported Windows Themes

Related to the scaling issue (listed below), MoversSuite recommends that if your client server is on Windows 10, that you avoid using themes developed for earlier versions of Windows. In other words, please load and use themes developed for the current version of Windows that you are on.

**NOTE:** The Aero theme works well with Windows Server 2008 R2. Reference the following video as a guide to installing the theme service and theme itself:  
[https://www.youtube.com/watch?v=Q\\_8VopNXVhE](https://www.youtube.com/watch?v=Q_8VopNXVhE)

Here is a link to additional information on Desktop Themes:  
<https://support.microsoft.com/en-us/help/13768/desktop-themes-featured>

## Screen scaling not available with MoversSuite

With the advances in screen size and resolution, many underlying applications are not able to deal with all the variations in configurations available to the variety of high definition (HD) screens, such as not being able to read field labels, etc. Due to this limitation, MoversSuite cannot scale as desired in all situations. **UPDATE:** With the release of MoversSuite 2018 R15, a solution has been implemented to address many of the issues involving scaling. (3705, 4114)

Until there is a better solution to scaling, EWS Group recommends that if you experience scaling problems with the MoversSuite application keep the size of your application to 100% and change the resolution as desired. On Windows machines, you can verify and/or update the display settings as follows:

1. Right-click somewhere on your desktop and select **Display Settings**
2. Set the **Change the size of text, apps, and other items** to 100%.
3. Click on **Apply** to save the changes.
4. Click on **Advanced display settings**.
5. Make changes to the **Resolution** as needed.
6. Click on **Apply** to save the changes.
7. Close the screen by pressing the **X** in the upper right-hand corner of the screen.