

Customer Town Hall

Fall 2023

MoversSuite
by **EWS**

*MoversSuite***Warehouse**
by **EWS**

*MoversSuite***O&ISales**
by **EWS**


TechMate
INTERNATIONAL



The agenda...

- What's new...
- What's in progress...
- What's planned...
- What's on **YOUR** mind...

What's new...

When we last met:

- Current Release was 2023 R05
- 2023 R06 was in Beta
- 2023 R07 was in Testing
- 2023 R08 was in Development

This meeting:

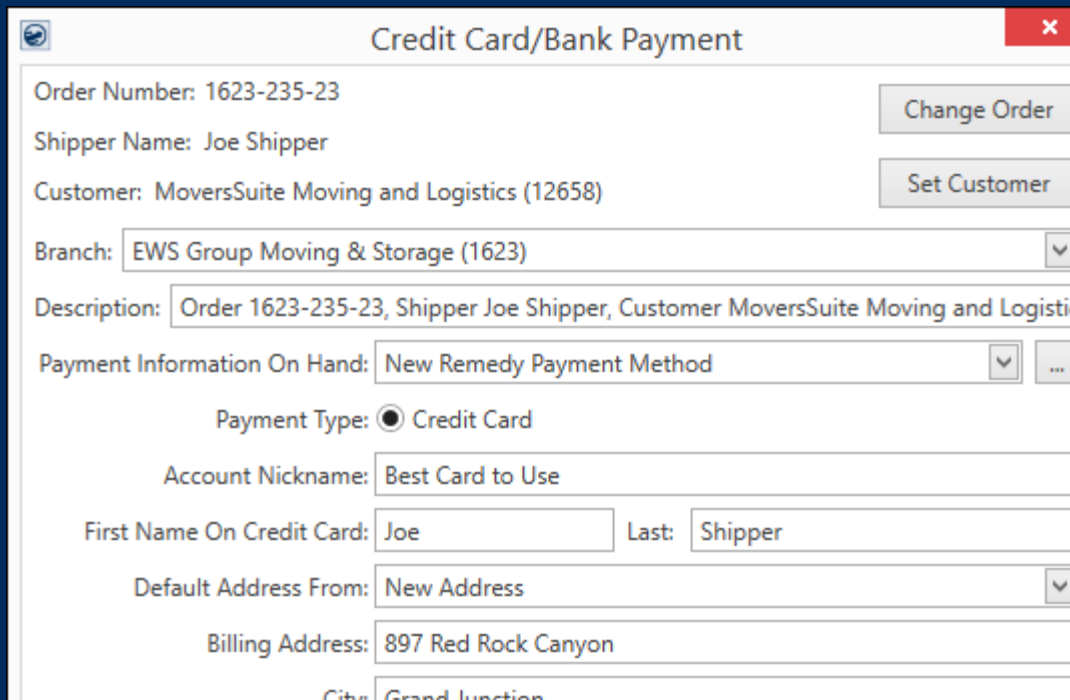
- Current Release is 2023 R20
- 2023 R21 is in Beta
- 2023 R22 is in Testing
- 2023 R23 is in Development

What's new...RECAP

- 15 Releases
- 66 Features & Enhancements
 - ✓ New functionality and improvements
- 72 Bugs
 - ✓ Fixes
- 39 Schema Changes
- 28 Admin Changes

What's new...Highlights

Remedy Payments (2023 R08)

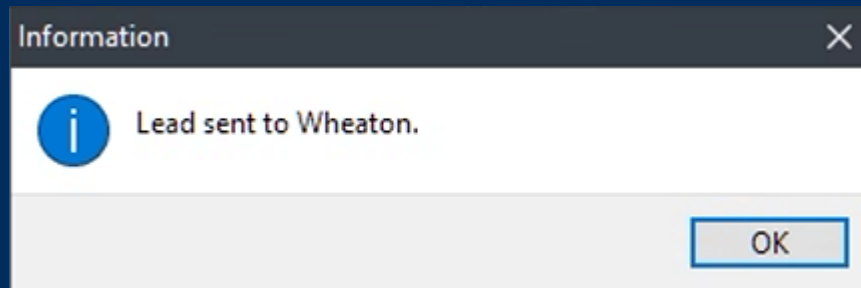


The screenshot shows a software window titled "Credit Card/Bank Payment" with a red close button in the top right corner. The form contains the following fields and controls:

- Order Number: 1623-235-23 (with a "Change Order" button to the right)
- Shipper Name: Joe Shipper
- Customer: MoversSuite Moving and Logistics (12658) (with a "Set Customer" button to the right)
- Branch: EWS Group Moving & Storage (1623) (dropdown menu)
- Description: Order 1623-235-23, Shipper Joe Shipper, Customer MoversSuite Moving and Logistics
- Payment Information On Hand: New Remedy Payment Method (dropdown menu with a "..." button to the right)
- Payment Type: Credit Card
- Account Nickname: Best Card to Use
- First Name On Credit Card: Joe (text input) Last: Shipper (text input)
- Default Address From: New Address (dropdown menu)
- Billing Address: 897 Red Rock Canyon (text input)
- City: Grand Junction (text input)

What's new...Highlights

Wheaton Integration (2023 R20)



What's new...Highlights

- MSO&ISales Integration Phase 1 (2023 R15)
- AtlasNet Document Download (2023 R15)

What's new...Highlights

Admin Improvements:

- Equipment Type can be marked as Inactive (2023 R06)
- Revenue Groups can be marked as Inactive (2023 R07)
- Permanently remove deleted Personnel Documents (2023 R07)

What's new...Highlights

Admin Improvements (cont'd):

- Reports can be marked as Inactive (2023 R07)
- Labor Types can be marked as Inactive (2023 R09)
- Crew Activity can be marked as Inactive (2023 R09)

What's new...Highlights

Admin Improvements (cont'd):

- Material Types can be marked as Inactive and assignable to modules (2023 R10)
- Add or remove branch assignments en masse on Personnel Setup records (2023 R18)
- Duplicate feature added to Move Type Setup for new branch assignment (2023 R18)

What's new...Highlights

Admin Improvements (cont'd):

- (Unsaved) indicator added (2023 R18, R20)

The screenshot shows a web-based form for configuring a 'Move Type Group'. The title bar of the window reads 'COD Int'l - EWS Group Moving & Storage (1623) (Unsaved)'. The form contains the following fields and options:

- Description:** A text input field containing 'COD Int'l'.
- Branch:** A dropdown menu with 'EWS Group Moving & Storage (1623)' selected.
- International Auto Register:** An unchecked checkbox.
- Inactive:** A checked checkbox.
- Make orders of this type available in Long Distance Disp:** An unchecked checkbox.
- Move Type Group:** A dropdown menu with 'COD Int'l' selected.
- Order Number Style:** A dropdown menu with '-none-' selected.
- Interface Items:** A section with a '+' icon and the text 'Click here to add a new Interface Item', followed by 'Add All' and 'Remove All' buttons.
- System User Defined Label Override Items:** A section with a '+' icon and the text 'Click here to add a new System User Defined Label Override Item', followed by 'Add All' and 'Remove All' buttons.
- Bottom Buttons:** 'Duplicate', 'Delete', 'Save', and 'Cancel' buttons.

What's new...Highlights

- 20 bookmarks added under O&I category
- 75 new fields added to BI Tool along with one new view
- Atlas and Unigroup fixes
- Document viewer has refresh button and sizing is saved per user (2023 R15)

What's in progress...

BETA

2023 R21 (Beta)

- Expand Employee Number to 16 characters
- Mass assign Move Type Group to Move Type records
- Two new BI Tool views
- Several admin changes including the ability to set the color on (Unsaved) and obfuscated passwords

What's in progress...

TEST

2023 R22 (Test)

- TechMate Integration – Automated Flow
- VendorConnect can be used by partners to send Document Notifications
- Crew punch shows under Default Branch
- More admin and BI Tool updates

What's in progress...

DEV

2023 R23 (Dev)

- Commissions On Hold no longer times out
- More admin and BI Tool changes
- Possibly more to come...

What's planned...

- CSI Pay: Add support for their new PYXiS API (by EOY)
- Remedy: Card Capture and Pre-Authorizations
- Arrivy Integration
- MSO&I Sales Integration (Phase 2: Quotes in progress)
- SIRVA: Revenue Statement and SISTRS Imports
- Expose Forms Designer to MSWeb
- Dynamics GP Replacement (in evaluation)

MSCrew: What's new...Highlights

- Past Jobs now display correctly

MSCrew: What's planned...

- Integrated Forms

MSWeb: What's new...Highlights

- All Billing Information is available (2023 R06)
- Can add documents up to 50 MB (2023 R06)
- Updated to handle duplicate filename (2023 R17)
- Ability to access orders for all move management modules (2023 R20)
- Software upgrades that improve overall loading and message handling

MSWeb: What's in progress...

DEV

- Send Emails
- Account Profiles
- View document size (2023 R22)

MSWeb: What's planned...

- Text Messaging
- Tasks
- Quotes
- Third Party Applications

What's new... **82 warehouses running**

- Pending Transactions and Reserved Inventory
- Location Sheets from adjustment and move transactions
- Many fixes and enhancements

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What's in progress...

- Stabilization and Performance Tuning
 - Updates to development tools
 - Performance Enhancements
- New Manual Location Sheet

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What's planned...

- Item Attributes
- Allow product to be moved from one warehouse to another
- Calculating Handling IN/OUT as an hourly charge
- Transactional user defined fields
- Inbound and Outbound Transaction Import

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What's going on...

- FirstMate
 - Tariff Updates
 - Additional tariff support
 - Updating to further automate MoversSuite connection



What's new...

53 licensed users

- MoversSuite Integration Phase 1 – basic order information
- Many Enhancements and Improvements

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Visit our websites for more information:

MoversSuite
by **EWS**

ewsgroup.com

*MoversSuite***Warehouse**
by **EWS**

mswhse.com

*MoversSuite***O&ISales**
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Website coming soon...


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What's on your mind?

Next Town Hall is scheduled for March 14, 2024