

Customer Town Hall

Spring 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 2022 R18
- 2022 R19 was in Beta
- 2022 R20 was in Testing
- 2022 R21 was in Development

This meeting:

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

What's new...RECAP

- 12 Releases
- 32 Features & Enhancements
 - ✓ New functionality and improvements
- 15 Bugs
 - ✓ Fixes
- 19 Schema Changes
- 11 Admin Changes

What's new...Highlights

Generic Revenue Import: Import items from third party invoices (2022 R23)

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	3RDPARTY														
2	Company Name	Customer No	Invoice No	Invoice Date	Item Code	Amount	Sale Ware	Trans	Date	ItemId	Customer Reference	3rd Vendor Number	Third Party Invoice Number	Third Party Payment Amount	
3	Jones	12443	123456	6/8/2022	3RD PARTY	863.54			6/8/2022	120	HD-3000-22	11198	123456789	647.	
4	Minishra	12658		6/8/2022	3RD PARTY	257.88			6/8/2022	120	HD-3000-22	11198	987654321	193.	
5	Smith	12658		5/27/2022	3RD PARTY	280.5			5/27/2022	120	HD-3003-22	10464	67686	230.	
6	Jackson	12658		6/8/2022	3RD PARTY	0			6/8/2022	120	HD-3004-22	11470	H45908-O	670.	
7															
8															
9															
10															
11															

2022 September Import

What's new...Highlights

Reductions: Apply automatically based on new templates (2023 R02)

The screenshot shows a 'Reduction Template' configuration window. It includes a description field, an 'Apply Reduction Based On The Following' section with a 'Select Reduction Type' dropdown (set to 'Percentage'), a 'Flat Rate Amount' field, a 'Percentage Basis' dropdown (set to 'Gross Amount'), and a 'Percentage Rate' field (set to '3.000'). There is also an 'Inactive' checkbox. The 'Add Back Item Details' section contains three dropdowns: 'Add Back Item Code', 'Add Back Branch', and 'Add Back Agent', all currently set to '-none-'. At the bottom, there is an 'Item Code Mapping' button and a group of 'Duplicate', 'Delete', 'Save', and 'Cancel' buttons.

Reduction Template

Description
Reduction Template

Inactive

Apply Reduction Based On The Following

Select Reduction Type
Percentage

Flat Rate Amount

Percentage Basis
Gross Amount

Percentage Rate
3.000

Add Back Item Details

Add Back Item Code
-none-

Add Back Branch
-none-

Add Back Agent
-none-

Item Code Mapping

Duplicate Delete Save Cancel

What's new...Highlights

Reductions: Apply automatically based on new templates (2023 R02)...continued

The screenshot displays the MoversSuite application window for a user. The interface includes a menu bar (File, Tools, Reports, Accounting Tools, Third Party Applications, Help) and a header area with order information: Order Number: 1623-235-23, Branch: 1623, Order Name: Shipper, and Salesperson: Cahill, Heather. The MSS Order Status is 'Booked' and the Shipment Status is 'H'. A search bar is present with 'Find order...' and buttons for Find, Refresh, Edit, Save, and Cancel. The main content area is divided into several sections: 'Order Information' (Origin Home, Work, Moving To Work), 'Billing Information' (Main Email, Spouse), 'Revenue Import', 'Transactions', 'Summary', and 'SIT/Recurring Billing'. The 'Customer' section shows 'MoversSuite Moving and Logistics (12658)' and a 'Bill To Address' field. The 'Moving From' section lists the origin address: 454 Main Street, Building A-10, Grand Junction, CO 81505, United States of America. The 'Moving To' section is split into 'Primary' (1354 E Shermwood Park Avenue, Suite #201, Grand Junction, CO 81501, United States of America) and 'Secondary' (One Stop Moving & Storage, 3800 SW Industrial Way, Palisade, CO 81521, United States of America). A 'Commissionable Employees' table is empty, showing '<No data to display>'. The right-hand side contains various dropdown menus for 'Revenue Clerk' (Tompkins, Billy), 'Type of Move' (1623:COD Local), 'Commodity' (HHG), 'Authority' (Own Authority), 'Shipment Type', 'Tariff/Rate' (Local), 'Contract', 'Reduction Profile' (highlighted in yellow), 'Bill Date', and 'Invoice Requirement' (Required). At the bottom right, there are buttons for 'Order Personnel', 'Shipment Details', and 'Container Tracking'.

What's new...Highlights

Sales Commission Hold Management: Filter by invoices and place holds on commissions for storage billing (2023 R02)

Revenue Branch: EWS Group Moving & Storage (1623)

<input checked="" type="checkbox"/>	<input type="checkbox"/>	Salesperson	Order Number	Revenue Total	Order Balance	Last Payment Received	Commission Amount	Status Info
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Heather Cahill	1623-235-23	\$0.00	\$0.00		\$193.76	
	<input checked="" type="checkbox"/>	Invoice Number	Invoice Date	Invoice Total	Invoice Balance	Commission Amount	Status Info	
	<input type="checkbox"/>	1000	01/06/2023	\$1,937.60	\$0.00	\$193.76		
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Sally Brown	1623-235-21	\$0.00	\$0.00		\$196.10	
	<input checked="" type="checkbox"/>	Invoice Number	Invoice Date	Invoice Total	Invoice Balance	Commission Amount	Status Info	
	<input type="checkbox"/>	No Invoice		\$0.00	\$0.00	\$75.00		
	<input type="checkbox"/>	1001	01/06/2023	\$1,211.00	\$0.00	\$121.10		

Selected: 0 \$0.00

Select All Clear All Remove Hold Close

What's new...Highlights

Job Costing: Add From Company Revenue category (2022 R19)

The screenshot shows the 'Job Costing' window with the following details:

- Order Number: 1623-235-21
- Shipper Name: Joe Shipper
- Revenue: From Company Revenue (selected), \$1,463.78
- Table of Expenses:

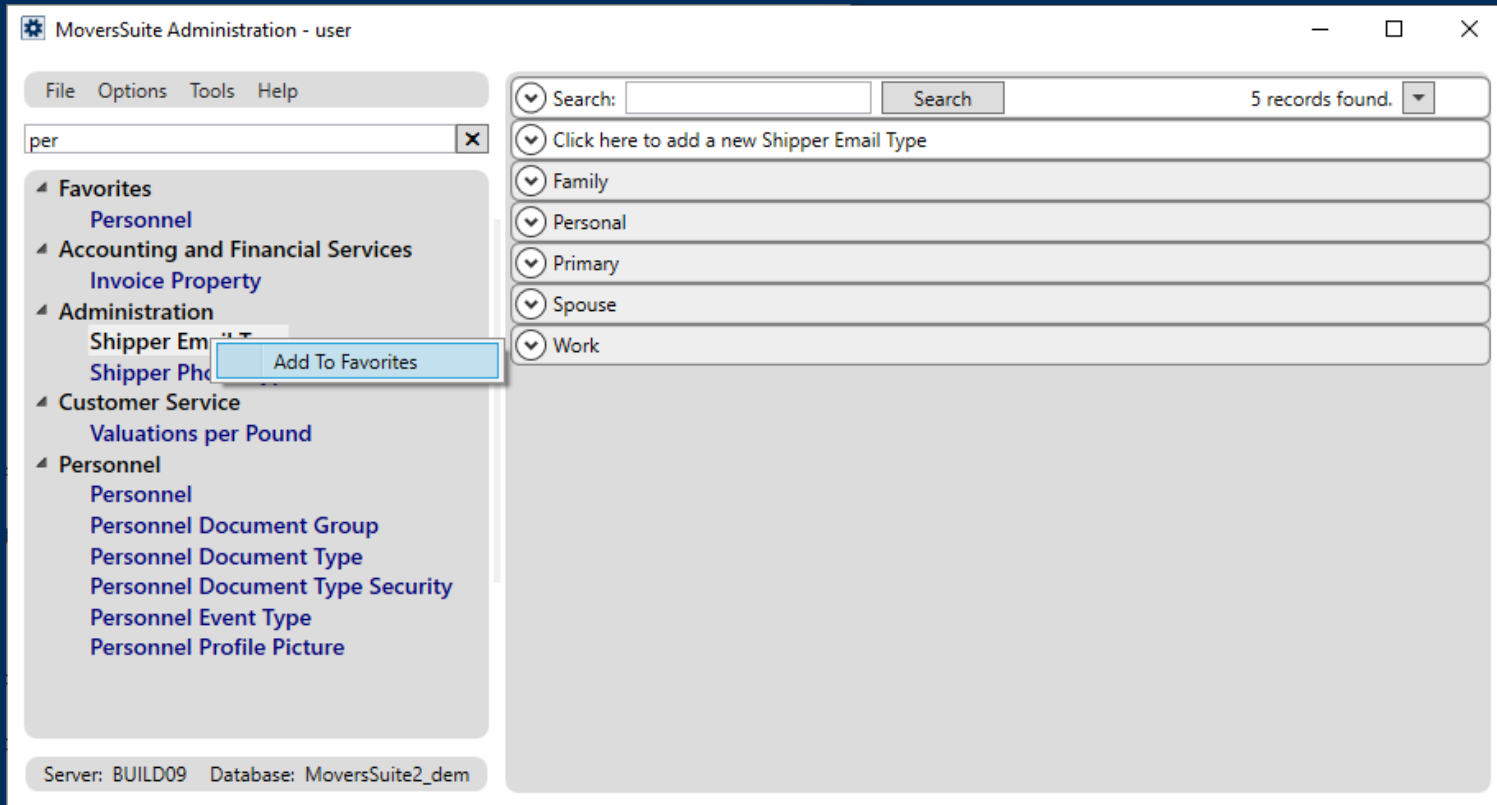
Date	Work Ticket	Expense Type	Expense Category	Crew Count	Hours per Crew	Quantity	Rate Type	Cost
8/30/2022		Packer	Labor	2	2.87	5.73	Regular	\$129.00
8/30/2022		Movers	Labor	1	2.87	2.87	Regular	\$71.67
8/30/2022		Dish Pack	Material			10		\$7.50
8/30/2022		1.5 Cubic Feet	Material			10		\$10.00
8/30/2022		3.0 Cubic Feet	Material			10		\$12.50
8/30/2022		4.5 Cubic Feet	Material			10		\$13.50
8/30/2022		6.0 Cubic Feet	Material			10		\$14.50
								\$258.67

Summary statistics at the bottom:

- Gross Margin: 82.33%
- Profit/Loss: \$1,205.11

What's new...Highlights

Admin Tool: Filtering and favorites added (2023 R02)



What's new...Highlights

- Admin Tool - Creation Date added to Equipment records to allow mass inactivation (2023 R04)
- Admin Tool – Updated many settings to clarify meaning and improve validation
- Admin Tool – Started the “Inactive” project
- Third Party Application Menu: Updated to allow webhooks from third-parties to interact with MoversSuite APIs (2023 R04)

What's new...Highlights

- MoversConnect Email Service (2022 R23)
- MoversConnect: Increased number of simultaneous request that local API service can handle (2022 R18)
- Document Management: Show Cc on emails captures (2023 R03)
- Document API can accommodate files up to 50 Mb (2022 R22)

What's new...Highlights

- BI Tool – 36 columns added and six new views
- Documentation: New Documentation Changes section available in the release notes

What's in progress...

BETA

2023 R06 (Beta)

- Document Management: Increase document size to 50 Mb
- BI Tool: More data available to Commission Statement Detail
- Forms Designer: Fix to the Local Service Address on O&I WKs

What's in progress...

TEST

2023 R07 (Test)

- Inactive flag to Reports, Personnel Documents, Labor Types, and Revenue Groups
- Increase note on Equipment records and improve visibility

What's in progress...

DEV

2023 R08 (Dev)

Nothing yet planned for this release

What's planned...

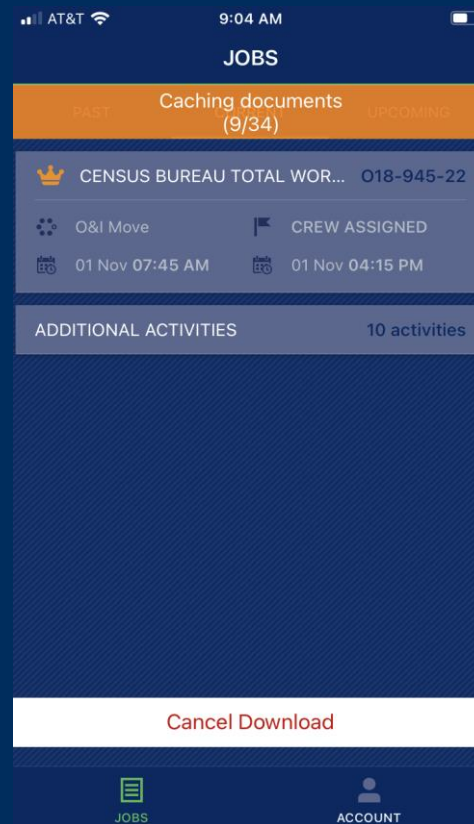
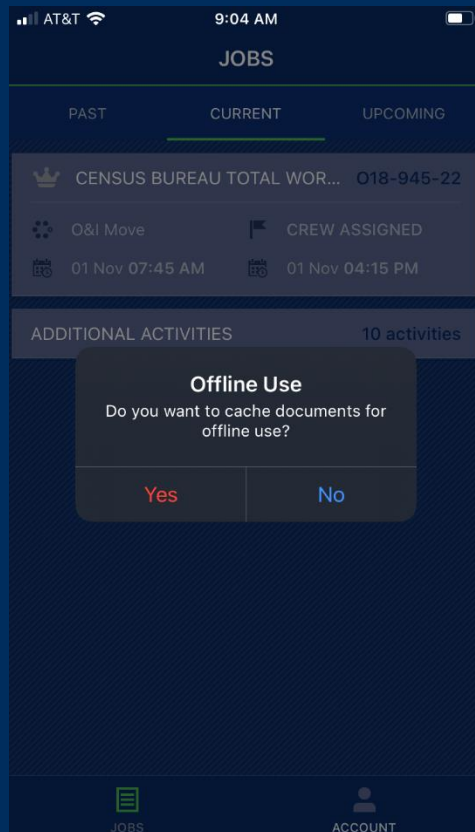
- Remedy credit card payment integration (in progress)
- Expose Forms Designer to MSWeb (AcroForms)
- MSO&I Sales Integration (Phase I in progress)
- Wheaton Integration (ready to start)
- CSI Pay: Add support for their new API

MSCrew: What's new...Highlights

- iOS (Apple) Latest: Version 2.11 requires 11.0+ on Mac and 13.0+ on other devices (updated 11/16/2022)
- Android Latest: Version 1.11 requires Android 6.0+ (updated 9/15/2022)
- Improved PDF annotation

MSCrew: What's new...Highlights

- Offline Documents available (iOS) only



MSCrew: What's planned...

- Offline Documents (Android)
- Integrated Forms (AcroForms?)
- Add Lead Indicator
- Show Materials in Sort Order
- Allow Project Manager to access their jobs
- Add Cell Phone to Contacts

MSWeb: What's new...Highlights

- Can add and delete documents
- Can update document properties
- View and set documents visible to the MSCrew app
- Can filter Orders view based on Order Status
- Search by name in Quick Find

MSWeb: What's in progress... **DEV**

- Billing Information (in progress)
- Grid and other control cleanup (security fixes as well)
- Planning Azure beta release

MSWeb: What's planned...

- Account Profile
- Emailing and Text Messaging
- Tasks
- Quote
- Third Party Applications

What's new... **58 warehouses running**

- New WRR Report
- New Vault History Report
- Defined recurring charges by customer
- Logistics Management – Can specify what warehouse(s) a customer is associated to
- Can auto generate WRR Number

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What's in progress...

- Pending Transactions and Reserved Inventory
- Location Sheets from adjustment and move transactions
- 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
 - TV carton added for Wheaton/Bekins



What's new...

37 licensed users

- Master Data Profiles
- MoversSuite Integration Phase 1 – in progress

MSO&ISales
by **EWS**

A happy customer...

MoversSuite
by EWS


PLANES
COMMERCIAL SERVICES

MSO&ISales
by EWS

I am Jack Supinger, Corporate Vice President of Sales for Planes Companies' commercial division. Planes has been a MoversSuite by EWS customer for over 16 years.

For the commercial division of Planes, we developed our own estimating system. After being introduced to MSO&ISales in April, Mike came out to Cincinnati to review the product with our team. We decided to give the system a test drive. We included members of the sales team, our IT staff, and developers. With EWS' plan of integrating this into MoversSuite saving double entry along with consistency of pricing, we made the decision to move forward and replace our home-grown system.

Mike Marxer mmarxer@ewsgroup.com [Schedule a meeting](#)



Visit our websites for more information:

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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 coming Spring of 2023