Customer Town Hall

Spring 2023

The agenda…

- What's new…

- What's in progress…

- What's planned…

- What's on **YOUR** mind…

MoversSuite
by EWS

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

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What's new…RECAP

- 12 Releases

- 32 Features & Enhancements
  - ✓ New functionality and improvements

- 15 Bugs
 - ✓ Fixes

- 19 Schema Changes

- 11 Admin Changes

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What's new...Highlights

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

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What's new...Highlights

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

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What's new...Highlights

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

What's new…Highlights

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

MoversSuite by **EWS**

What's new...Highlights

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

What's new…Highlights

Admin Tool: Filtering and favorites added (2023 R02)
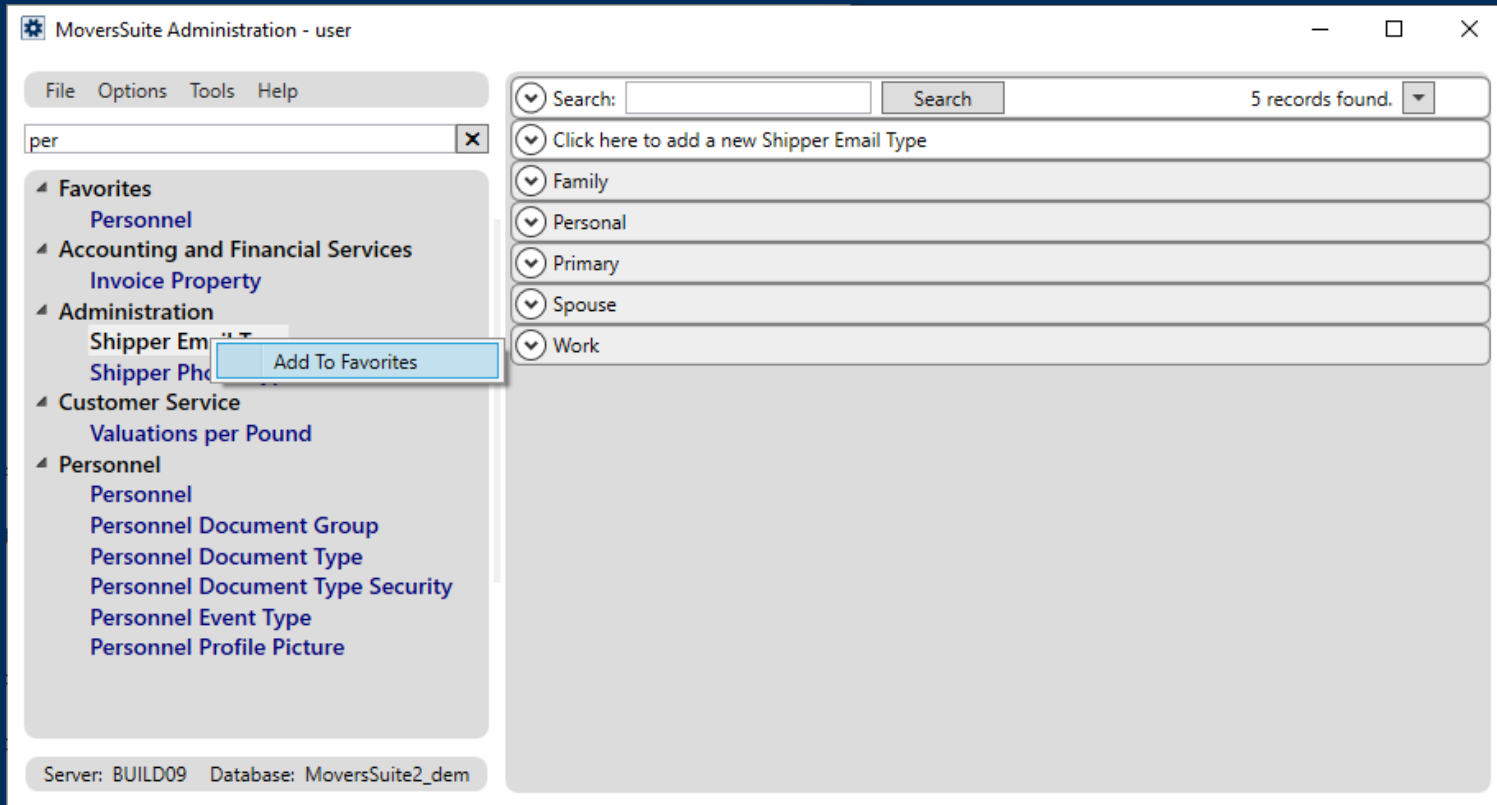
What's new…Highlights

- 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)

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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)

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What's new...Highlights

- BI Tool – 36 columns added and six new views

- Documentation: New Documentation Changes section available in the release notes

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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

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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

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What's in progress… DEV

2023 R08 (Dev)

Nothing yet planned for this release

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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

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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

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MSCrew: What's new...Highlights

- Offline Documents available (iOS) only

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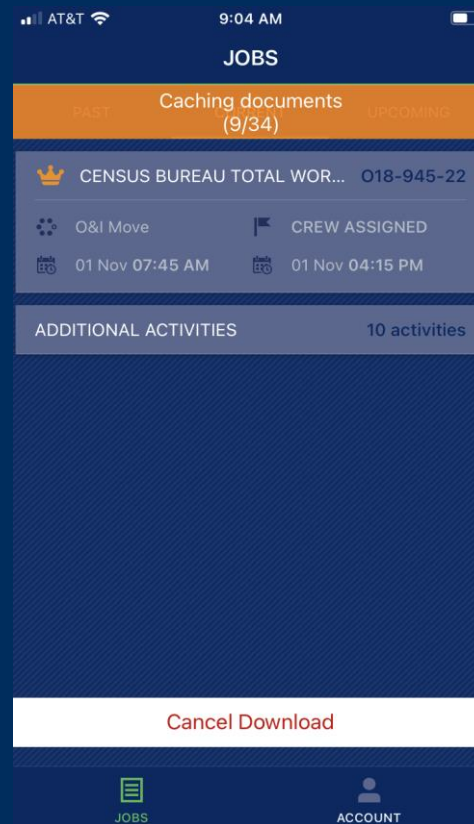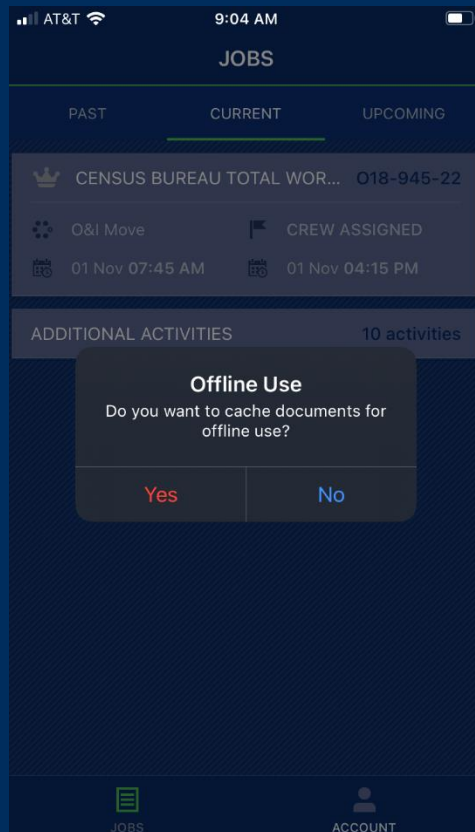
MSCrew: What's planned…

- 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

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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

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MSWeb: What's in progress...   DEV

- Billing Information (in progress)

- Grid and other control cleanup (security fixes as well)

- Planning Azure beta release

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MSWeb: What's planned…

- Account Profile

- Emailing and Text Messaging

- Tasks

- Quote

- Third Party Applications

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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

MoversSuite **Warehouse**
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What's in progress…

- Pending Transactions and Reserved Inventory

- Location Sheets from adjustment and move transactions

- New Manual Location Sheet

*MoversSuite***Warehouse**
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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

*MoversSuite***Warehouse**
by EWS

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…

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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:

MoversSuite by EWS — ewsgroup.com

MoversSuiteWarehouse by EWS — mswhse.com

MoversSuiteO&ISales by EWS — Website coming soon...

TechMate INTERNATIONAL — techmateintl.com

What's on your mind?

Next Town Hall is scheduled coming Spring of 2023