

MoversSuite

Quarterly Newsletter

Issue #7, April 2009

MoversSuite.com

MoversSuite v3.8

Two big enhancements dominate the changes made to MoversSuite for the Spring 2009 release. They are the **Van Line Affiliation in Order Numbers** and **SIRVA Registration Order Upload** enhancements.

Van Line Affiliation in Order Numbers

The van line associated to a move will be included within the MoversSuite order number and will allow duplicate order numbers to exist for different van lines. Additionally, the order number can now be up to 23 characters in length.

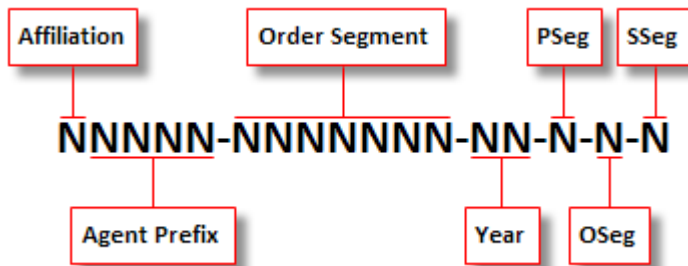


Figure: New Order Number format

SIRVA Registration Order Upload

Orders established and not booked in MoversSuite can now be sent to SIRVA to be registered through the SIRVA Hub. Now orders can be booked on either system and sent to the other system for updates.

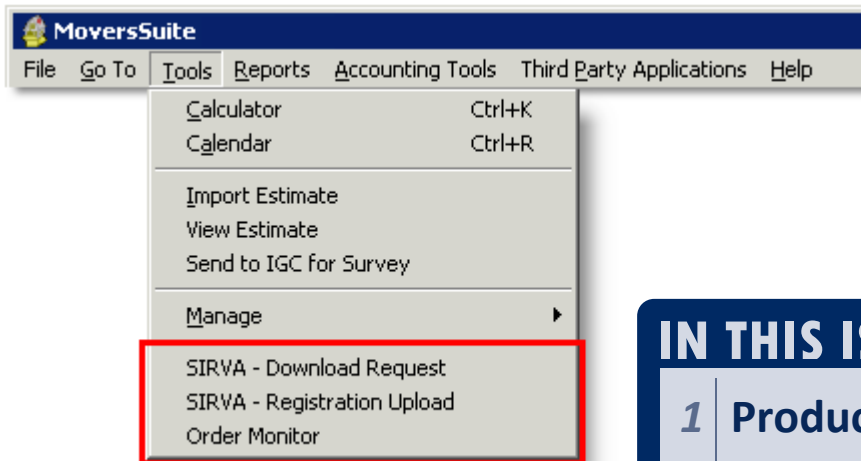


Figure: SIRVA options available through MoversSuite

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PRODUCT UPDATE

A Few Highlights of MoversSuite v3.8

A substantial number of smaller enhancements and fixes have been made in this release, as well.

Here's a brief list:

- Batch totals will now be updated when a Cash Receipt is moved or voided
- Country of the customer on a Customer Statement will now display
- A new field has been added to set the Payment Method needed by SIRVA Hub. On previous versions of MoversSuite, the Payment Type field was used for this purpose. Now each field can be used accordingly
- Customer Statements have had several payment issues resolved and have been given a new layout
- Time field values can be cleared from an order using the DELETE key (see Q&A section)
- Hotkeys have been fixed in Local Dispatch and Revenue Entry
- Packing details are now imported from IGC QuickMove into MoversSuite
- Issues where concurrent updates on the same record in Local Dispatch have been resolved
- Social Security Numbers can be masked by using the X character, such as "XXXX-XX-1234"

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Our family is growing. See the list of new clients at www.MoversSuite.com

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Third Party Application Order Monitor

An exciting feature introduced with the SIRVA changes is the Third Party Application Order Monitor. This is a separate executable that is launched from within MoversSuite and provides a visual means to quickly recognize the status of a request submitted to an external system.

Third Party Interface Order Monitor	
 Request returned with Errors	
Shipper: Shipper	Estimate:
Error: Move Type associated to this order does not map to a SIRVA External Code. Move Type is found within the Move Information tab.	
 Success!	Order Number: 510704000000
Shipper: Shipper	Estimate:
 Success with Errors	Order Number: 510705000000
Shipper: Shipper	Estimate:
Error: DECLARED VALUE RAISED TO MINIMUM FOR SHIPMENT WEIGHT:	
 Request is 0 minutes old.	
Shipper: Shipper	Estimate:

Figure: Third Party Interface Order Monitor

A Few More Highlights...

- Recurring Billing has been updated with many changes including having all activity logged, ability to accept localized (international) dates, all rates are required to belong to valid Item Codes, etc.
- Several fixes to Revenue Entry have been made including correctly setting the invoice and reduced amounts on allocated items when a group is reversed
- The Destination Agent's identifier can now be accessed through the *daagent* bookmark
- New reports include *Orders by Load, Pack, or Delivery Date, Security Profile Detail, Employee by Branch, and Move Type by Branch*
- Over 15 reports have been updated along with many others that benefit from general changes, including adding the ability to select (copy and paste) text from reports generated within the Report Viewer
- All the administration screens added during this release have many excellent features, such as immediate editing capabilities, highlighted multi-line edit ability, quick delete functionality, etc.

A complete guide to SIRVA Hub integration is available through the online help for Version 3.8 of MoversSuite.

Be sure to read through the *Product Update* for version 3.8 available by [clicking here](#) to get all the details and important notices regarding migrating to the latest version of MoversSuite.

Microsoft Dynamics GP users can take advantage of monthly maintenance costs and upgrade now to GP 10, which will be required to upgrade to MoversSuite v3.8. Contact [Sales](#) for upgrade information.

BLOG UPDATE

www.moverssuite.com/blog

Maroon Beta Release

Get the last scoop on what our beta clients see and find out the where we come up with our release names, such as Maroon and Shavano.

Documenting Third Party Errors

Last month a request was sent out in the form of a blog by Allan Lamar, Director of Professional Services, to identify the most common of third party errors. From the list, we'll prioritize the errors by volume and begin producing more detailed information on the cause and resolution of the error. So, send us your list!

Did You Know?

An order can only be updated as the result of a rating send prior to van line registration and after the actual delivery date is set. During the time between registration and actual delivery only registration downloads will update the order information in MoversSuite.

Why are phone numbers not appearing in the Claims grid?

The default **Claim Phone Types** should not be altered. The application will look for particular phone types when displaying records in the Claims work grid. If other types are defined and referenced within Claim Details, then they will not display in the grid. Only the following list of types is supported by MoversSuite:

Default Claim Phone Type
Home Phone
Work Phone
Cell Phone
Fax

If “Home Phone” is altered to be just “Home,” for example, then the phone number assigned to it will not appear within the Claims grid.

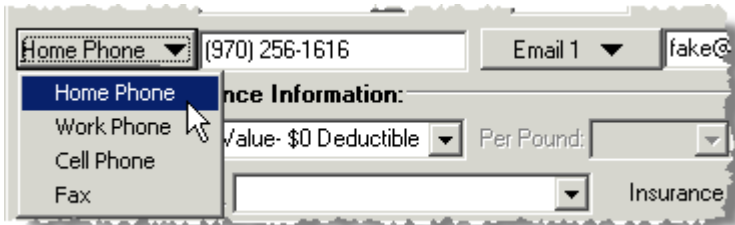


Figure: Correct default Claim Phone Types

The Claim Phone types are defined within **Mover’s Suite Administration > Common > Claims > Claims Phone Type**.

Note: Administrators can define which phone type appears as the default value within the Claims Detail screen by setting the **Is Default** flag.

How can we set the OA Coordinator?

The **OA Coordinator** and **OA Surveyor** fields will only be available when the **Agents > Origin Agent** is a sister agency. Once the Origin Agent is set to a sister agency, then the fields will appear at the bottom of the Agents tab.

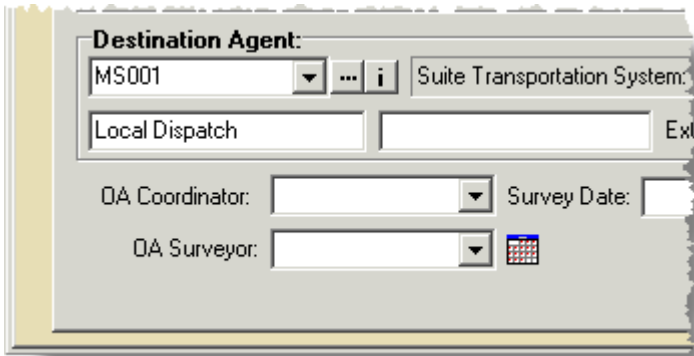


Figure: OA fields become available when Origin Agent is a sister agency

QUESTIONS & ANSWERS

For employees to appear within the drop-down menu for OA Coordinator or OA Surveyor, they must be assigned to the same branch as the Origin Agent/Sister Agency.

Refer to the **Move Setup > Agents > Sister Agency** and **User Setup > Personnel > Assigned Branches** within MoversSuite Administration – web.

How can time values be cleared in MoversSuite?

As of the Spring 2009 release, time field values can be cleared using the DELETE key. Simply select the entire time value, such as the starting Load Date, and press the DELETE key. You will then have to click on another field or press Save in order to see the time value be removed.

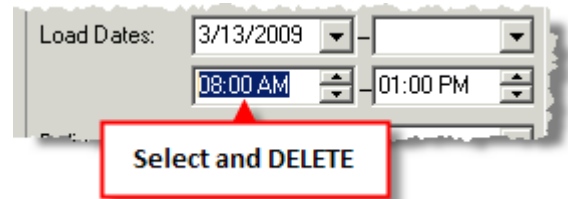


Figure: Move Information > Load Dates > Time Range

Note: Date fields can be cleared using this same procedure.

Why are some memos in UniGroup not downloaded as notes to MoversSuite?

When the **Send to Van Line > Private** flag is set on a note, the uploaded memo will not be sent to other agents on the mainframe. Only the agent who uploaded the memo will have it on their local system. However, all agents can still access the UniGroup mainframe and view the memo.

Note: Previously we incorrectly stated that the memo was viewable to the agent who uploaded the memo.

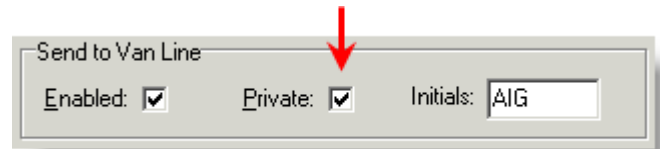


Figure: Private flag within the Add/Edit Notes window

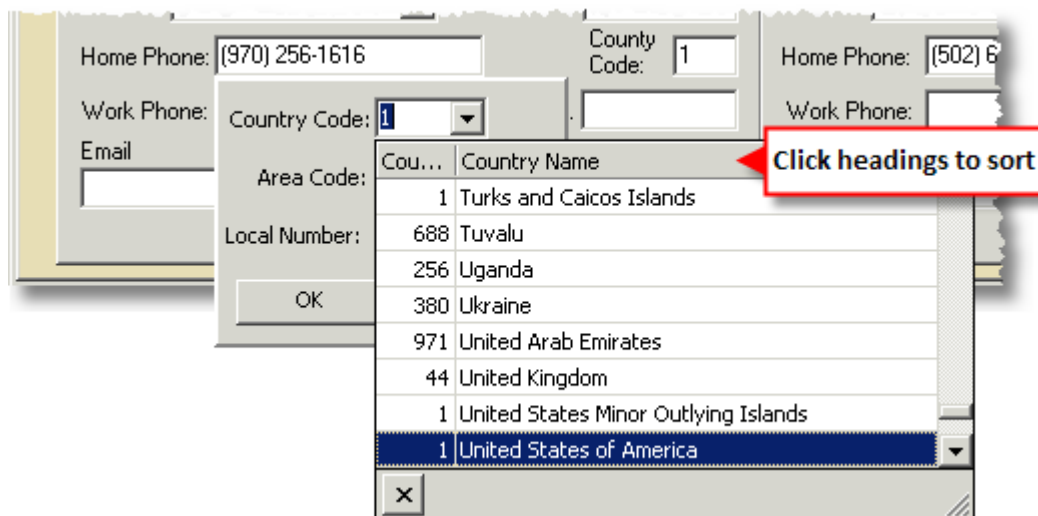
MoversSuite recommends setting the **Private** flag only if the intent is to not have the note uploaded to all agent’s local systems.

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What are the valid Country Codes available in MoversSuite?

The Country Code is referenced in many places throughout MoversSuite and is set for the primary moving addresses on the **Name, Address, Phone** tab. To quickly identify what the valid codes are, access an order in Edit mode, open the Name, Address, Phone tab and click on the telephone icon (☎) within one of the phone number fields, such as Home Phone, and when the drop-down opens click on Country Code and a Country Code selector will appear where all codes will be displayed. Click either column heading to sort the listing by either the Country Code or Country Name.



Did You Know?

By just going to the Contents screen, the MoversSuite application will perform a data refresh thereby updating the current screens with any data base changes that may have occurred since the last refresh.

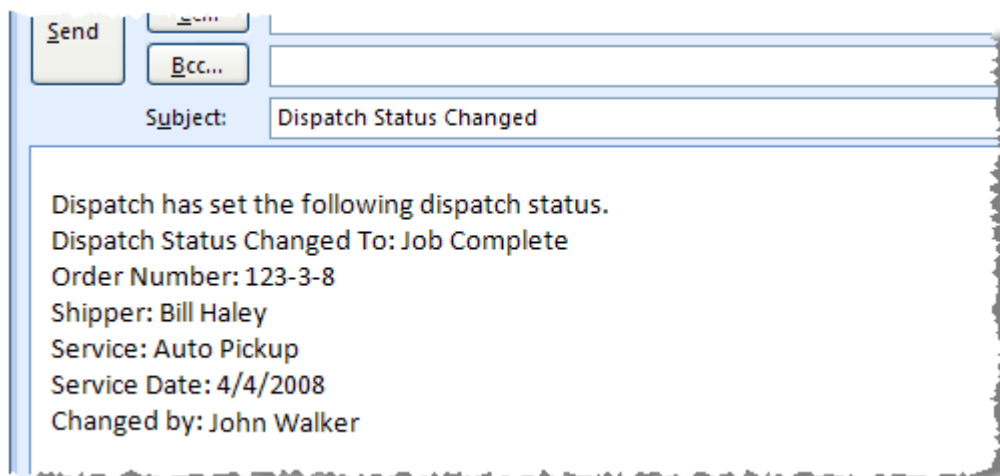
Figure: Using a phone field to list the available Country Codes

Can MoversSuite generate email notifications automatically?

Yes. There are two services that generate email notifications sent automatically from MoversSuite. One is controlled through Email Options and the other is the Monitor Orders.

The **Email Options** settings can be set up to send order personnel, such as salesperson and coordinators, an email when a particular event occurs on orders to which they are assigned. For instance, the Transportation Coordinator can be set up to receive an email notification when a local service has been cleared or cancelled.

The subject and body of the message will contain pertinent information including the action that occurred, order number, shipper, service description, service date, and the person who made the change that triggered the notification.



Did You Know?

Did you know the online help features a help page with all kinds of great tips. Click on the help icon from the main toolbar to access this page.

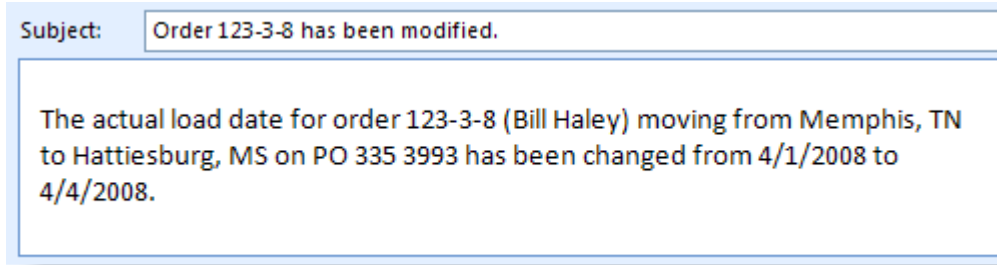
Figure: Email Options sample email

Refer to the [Automatic Email Service](#) topic in the online help for more information.

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Those that have purchased the **Account Profile** module will have access to the **Monitor Orders** functionality which will automatically generate email notifications whenever the **Actual Load** or **Actual Delivery Date** changes for any order assigned to the customer Account Profile.



See the [Monitor Orders Services](#) topic for a complete description.

Figure: Order Monitors sample email

NEW IN MOVERSSUITE SUPPORT...

Follow-up Training:

Avoiding the Time Vampire

The simple mission of our **Follow-up** training program is to provide the tools necessary to use MoversSuite to its fullest potential and to make your organization more effective across the board.

Our Follow-up training starts out with us reviewing your processes. We then identify places where more training, adjustments in workflow, or additional functionality will increase performance and effectiveness.

Additionally, we train new personnel and provide refresher courses.

In the end, we build confidence in all personnel through knowledge, increased efficiency and empowerment. All the feedback that we have received from this program indicates that its benefits significantly outweigh the cost. Anita Luce, consultant, has coined a phrase that describes her mission when giving on-site training, "We help you avoid the Time Vampire – making sure that all contributions are coordinated to achieve common goals and financial stability."

We help
you avoid
the Time
Vampire

PSA ROLLOUT

Our support team has rolled-out a new *Product Support Agreement (PSA)* to increase efficiencies within the incident resolution process through effective communication between designated contacts and MoversSuite support.

The process starts with technical contacts. Each organization will have primary and secondary contacts that will have knowledge of all supported products, such as MoversSuite and Microsoft Dynamics GP, and will spearhead the incident identification and submission process. They will use their training to effectively isolate the source of the issue and present well-formed and well-researched data to Product Support through online incident submission using the support website.

Limiting calls to Product Support will streamline issue resolution by dedicating a support rep to each incident who will track it through resolution.

We anticipate that that the PSA will improve response times and improve communications between your organization and MoversSuite Product Support.

View the Product Support Agreement online through our [support site](#) or by [clicking here](#) and find out more on the roles and responsibilities of the technical contacts, classification of incident, incident resolution process, and more.

A blog has also been posted on this subject. Read and offer you own thoughts through our blog site. [Click here](#) to view the log post on this topic.

Missing documentation? Send us a [message](#) about what you'd like to see added to our documentation.

TECH TIPS

Ad Hoc Reporting based on MoversSuite Data Models

The ease of creating custom reports took a big step forward with the introduction of Microsoft SQL Server 2005. MoversSuite data models can be developed and exposed through the **Report Builder** where a user can simply open the model, such as *Order Information*, and select the fields to be reported, such as *Order Number*, *Shipper Name*, etc. , and place these in a report. The data can be sorted, totaled, and grouped, just like existing reports develop in **Reporting Services**. The ability to create on-the-fly (ad hoc), custom reports will be completely in your hands.

We need your input

In order to begin creating these models, MoversSuite Development must find out if there's enough interest among our clients. If you think that using the plug-n-play ease of creating custom reports is something that you're interested in, then please contact support@moverssuite.com. We will also need to know which data you would like to see in the reporting data models, so be sure to include this information in the body of your message. Read more about this functionality through the [SQL Server Developer Center](#).

Column Identifying SQL Script

Among other tools used to view database information, our Documentation team uses the following script to quickly find a field (column) name within the MoversSuite database:

```
USE [MoversSuite2]
select
    tables.TABLE_TYPE as 'Table Type',
    info.TABLE_NAME as 'Table',
    info.COLUMN_NAME as 'Name',
    info.DATA_TYPE as 'Column Type',
    COLUMNPROPERTY( OBJECT_ID( info.TABLE_NAME ), info.COLUMN_NAME,
'Precision' ) as 'Length'
from INFORMATION_SCHEMA.COLUMNS as info
join INFORMATION_SCHEMA.TABLES as tables on ( tables.TABLE_NAME =
info.TABLE_NAME )
where info.COLUMN_NAME like '%order%'
order by info.TABLE_NAME
```

This script can be executed through any database access protocol, such as Microsoft SQL Server Management Studio.

	Table Type	Table	Name	Column Type	Length
1	BASE TABLE	AccountProfileContacts	MonitorOrders	bit	1
2	BASE TABLE	AccountProfileOrderPr...	AccountProfile...	int	10
3	BASE TABLE	AccountProfileOrderPr...	OrderFID	int	10
4	BASE TABLE	AccountProfileService...	OrderFID	int	10
5	BASE TABLE	AcctTransactions	OrderNo	varchar	23

Figure: SQL query results from above script

When ran, the script will list all fields that contain the word "order" in their name. This search value can be switched to locate other named fields, as well. The database can easily be changed to reference any database and will work on just about any SQL database.

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Information on regional meetings and tradeshow:
events@moverssuite.com

Newsletter

Submit ideas/suggestions to:
marketing@moverssuite.com

HOLIDAYS

Mover's Suite Software, LLC observes the following holidays. Technical support will not be available on the dates listed below:

Jan. 1	New Year's Day
May 25	Memorial Day
July 3	Independence Day
Sept. 7	Labor Day
Nov. 26-27	Thanksgiving
Dec. 25	Christmas Day