

# *MoversSuite*

Reference Guide

## Product Update 3.10

Enhancements and fixes to MoversSuite

## **Product Update 3.10**

### **Version 3.10 (Fall 2009)**

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#### **Printing Information**

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# What's New in MoversSuite



This document lists the changes made to MoversSuite software for the Fall 2009 release.

Contact your Professional Support representative for information specific to loading this version of MoversSuite, or contact Sales and Marketing for purchasing and additional information on related products and services.

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## General Update Notices

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### Notice:

All fixes and enhancements listed for the Mid-Year Release (version 3.9) of MoversSuite are also available in this release. Refer to the [Product Updates](#) page for a listing.

### Notice:

MoversSuite is fully compatible with Microsoft Windows 7 and is fully supported by all 64-bit machines. Refer to the [Compatibility Matrix](#) for more information.

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# General Application Enhancements at Version 3.10

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This section lists the enhancements made to MoversSuite.

Fix or Enhancement Description	Ref. #
<b>AR Credit &amp; Collections</b> module was added. Refer to <a href="#">AR Credit &amp; Collections</a> topic for more information.	2585
<b>Document Management</b> module was added. Refer to <a href="#">Document Management for MoversSuite</a> topic for more information.	2604
All details of posted items in <b>Payment Management</b> can now be viewed with read-only access. A new <b>View</b> button replaces the Apply button in Detail Processing when the batch has been posted. See the <a href="#">Payment Management</a> or, specifically, the <a href="#">Detail Processing Overview</a> topics for more information.	1203
Several enhancements have been made to the <b>Tasks</b> module. Refer to the <a href="#">Tasks Fixes</a> section.	

## General Application Fixes at Version 3.10

Version 3.10 of MoversSuite includes the following fixes made to the mid-year release of MoversSuite (version 3.9 - refer to the [Product Updates](#) page for a listing).

### Account Profile Fixes

Fix or Enhancement Description	Ref. #
When the Task Definition is set for the <b>Account Profile</b> and Task Group is not, the Task Group is still required to be set at lead creation (fixed under Tasks issue # 1473).	1221

### Cash Receipts Fixes

Fix or Enhancement Description	Ref. #
Voiding all cash receipts in a batch was automatically voiding the batch. Now when all cash receipts in a batch are voided the batch will remain allowing it to be reused or voided within Payment Management.	2464
Username was not appearing when voiding a cash receipt.	2724

### Claims Fixes

Fix or Enhancement Description	Ref. #
Users were allowed to change the branch within the <b>Claims Settlement</b> screen even though posted settlement items existed. Users will now be prevented from changing the branch of a posted claim item, however, if the branch is changed for a claim, the change will be reflected on all un-posted items.	2594
Incorrect branch identifier was appearing in some error messages.	2406

### Customer Statement Fixes

Fix or Enhancement Description	Ref. #
When a particular Customer was selected that was not associated to the selected Customer Class, no statement was generated. Now, if a Customer is selected, no matter which class it belongs with, statements will only be generated for the selected Customer; i.e. if Customer is selected, Customer Class is ignored.	2901
A 64-branch limit in the <b>Generate Statement</b> dialog was preventing users from running customer statements.	2786

The labels for several run options in <b>Generate Statement</b> dialog have been reworded for clarity.	2660
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## Customer Web Portal Fixes

Fix or Enhancement Description	Ref. #
Fixed search by date issues.	2709 2712
Order notes created through the Customer Web Portal were being marked as private instead of public by default. Now they will be marked public.	2715

## General Fixes

Fix or Enhancement Description	Ref. #
The <b>Calendar</b> function has been updated to evoke the entire email address instead of only the alias portion (that which preceded the @ symbol). Refer to the <a href="#">Email and Calendar Options in MoversSuite</a> topic for more information.	2675
Users are now required to have an email address set in their <b>Personnel</b> setup record. See <a href="#">Personnel Email Settings</a> for details.	2835
<b>Shipment Details</b> button will now appear in bold weighted font when data has been entered for Shipment Information.	2423
MoversSuite now recognizes localized date settings such as those used outside the United States.	2474
The ampersand (&) in field names was being replaced by and underscore (_). This was noted in the Agents tab but has been changed throughout the application.	1422
Ampersand in names was not displaying correctly in the information bar.	1480

## Invoicing Fixes

Fix or Enhancement Description	Ref. #
LocServ index problem resulted from improper data type	1073
An invoice group was allowed to be added multiple times to an invoice when creating a <b>New Complete</b> or <b>New Supplemental Invoice</b> . Now, an invoice group can only added once.	2065
Rate field in <b>New Complete</b> and <b>New Supplement Invoice</b> and on invoice reports is now a two decimal, numeric field. Previously this field could display up to four digits to the	2738

right of the decimal point.	
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## Local Dispatch Fixes

Fix or Enhancement Description	Ref. #
When dispatchers added services for more than one day, some of the services were going into idle status.	2329

## Microsoft Dynamics GP Fixes

Fix or Enhancement Description	Ref. #
Issue where payables entered through Microsoft Dynamics GP and immediately voided were appearing as open when viewed through <b>Dynamics GP Order Inquiry</b> has now been fixed.	2692
A problem with errors occurring when there was no data to report in certain sections of the <b>Work Ticket</b> (affects Microsoft SQL Server 2008 and Reporting Services 2008 only) has been addressed.	2606

## Payment Management Fixes

Fix or Enhancement Description	Ref. #
Combined items were included as part of the combined amount and as separate amounts, as well.	2609
The ability to void a batch as been restricted to the following batch scenarios: <ol style="list-style-type: none"> <li>1. The batch contains no detail items (empty batch)</li> <li>2. The batch is in a System state and all cash receipts have been voided</li> <li>3. The batch is in an Open state (Statement Imports) and contains no detail records</li> </ol>	2745
All details of posted items in <b>Payment Management</b> can now be viewed with read-only access. A new <b>View</b> button replaces the Apply button in Detail Processing when the batch has been posted. See the <a href="#">Payment Management</a> or, specifically, the <a href="#">Detail Processing Overview</a> topics for more information.	1203
The Shipper field in the <b>Apply Wizard</b> now displays the value set for the Last Name/Company Name field on the order. Prior this change, the Shipper field included the Order Number as well as the last name and was too long to display correctly.	2559

## Quote Fixes

Fix or Enhancement Description	Ref. #
Amount fields within the <b>Add</b> or <b>Edit Quote</b> dialog (available through the Quote tab) have been expanded in size.	2234

## Recurring Billing & Storage Fixes

Fix or Enhancement Description	Ref. #
Issue where storage items under a branch other than the branch of the order were not being reported correctly has been resolved.	2581
Default setting for new billing items has been set to <b>Recurring No End Date</b> . The previous default in the <b>Add Billing Item</b> dialog was Non-Recurring.	2831
Errors occurred during a billing run if the run was associated to a revenue group that did not contain "Storage" in its description. Storage revenue groups will now be identified by the new <b>IsStorageRevenueGroup</b> setting in Mover's Suite Administration. The error that occurred when the group did not contain "Storage" will now appear when this flag is not set for a storage revenue group. See the <a href="#">Revenue Group Setup for Storage Billing</a> topic for more information.	2621
<b>Rate Table</b> and <b>Authority</b> fields in <b>Recurring Billing Setup</b> will now default to their respective values associated to the order.	2266
Users will not be allowed to change fields values for finalized billing items through the	2453

View option in **Recurring Billing Setup**.

## Reporting Fixes

Fix or Enhancement Description	Ref. #
<b>Commission Plan Details</b> report now displays all commission plans. Previously, commission plans with no detail information were left off the report.	2491
<b>Standard Invoice (long)</b> and <b>Standard Invoice (short)</b> reports have been modified to display the Rate field as two decimals instead of four.	2738
<b>Employee by Branch</b> report now sorts by detail items correctly.	2546
<b>Move Type by Branch</b> report now displays records that are not assigned to a Move Type Group nor associated to an Order Numbers format.	2539
<b>NEW - Dispatching Summary</b> report was added to the list of standard reports. Refer to the <a href="#">Dispatching Summary Report</a> topic for details.	2437

## Revenue Entry Fixes

Fix or Enhancement Description	Ref. #
Issue where the customer was changed on a reversal but showed on the invoice under the original customer has been corrected.	2767
<b>Journal</b> and <b>Document Dates</b> will now be converted to a standard date in the current month and year when only a single-digit is entered to ensure that the dates are within periods in Microsoft Dynamics GP.	2817
Issue where a <b>Reverse</b> at the group level was undoing a reversed commission on allocated items has been fixed.	2481
Issue where the manual commissions were based on the invoice amount or net amount for the group instead of the split revenue items has been fixed.	2633
Column headings in the <b>Transactions</b> data grid are no longer out of alignment with the data.	2076

## SIRVA Integration Fixes

Fix or Enhancement Description	Ref. #
<b>Segment</b> numbers were not being renumbered when new segments were added which in turn caused an upload validation failure.	2603
Required <b>Guarantee Price Information</b> that was not set by the user was causing an error. Default settings are now set for all fields required for a SIRVA upload.	2618

The <b>Maximum Containers/Packing Charge</b> and <b>Credit Per CWT</b> fields now default to a zero value. This allows records with no <b>Guarantee Pricing Information</b> to be validated as part of an upload.	2765
Downloads from SIRVA with 0 set for the miles was overwriting the Miles set in MoversSuite for the order. Now when the download process encounters a 0 for the miles from SIRVA it will not update MoversSuite.	2496

## Tasks Fixes

Fix or Enhancement Description	Ref. #
Task item lists will be created when the <b>Task Definition</b> is set (or already defined for a new order through Account Profiles). Previously, the Task Definition and Task Group fields both had to be set in order to build the task items.	1473
Tasks items based on Task Definition will be automatically generated/updated upon a Save. Prior to this change when a new order was created, the task items were not generated upon an initial Save, even though the Task Definition was set.	2832
The due date can be changed for task items not marked completed or not applicable through the new Change Task Due Date function. Refer to the <a href="#">Changing a Task Due Date</a> topic for more information.	2799
<p><b>Tasks Workflow</b> has been enhanced as follows:</p> <ul style="list-style-type: none"> <li>• View options are better aligned to what is needed by the user</li> <li>• View results are displayed in a more efficient manner</li> <li>• Columns can be added, deleted, or moved in the data grid</li> <li>• Tasks can be marked as Not Applicable</li> <li>• New Change Task Due Date button added</li> <li>• Multiple task items can be selected at a time and marked Task Complete or Not Applicable</li> <li>• Hot keys have been enabled</li> </ul> <p><b>Tasks tab</b> for order records has been enhanced as follows:</p> <ul style="list-style-type: none"> <li>• Screen can be expanded to view more data</li> <li>• Columns can be added, deleted, or moved in the data grid</li> <li>• New Change Task Due Date button added</li> <li>• Add Task button added</li> <li>• Buttons arranged similar to what is available through Tasks Workflow</li> </ul>	2800

## TechMate Integration Fixes

Fix or Enhancement Description	Ref. #
An issue rendering Agent Id incorrectly on XML imports has been fixed.	2845

Import records with international postal codes were failing. Now the import process can accept any postal code value up to 10 digits in length.	2691
Updated import and export process to allow multiple extra pickups and extra deliveries.	2575

## UniGroup Fixes

Fix or Enhancement Description	Ref. #
An issue with items marked to be invoiced and having discounts incorrectly applied to them has been corrected for the rating send.	2626
Downloaded special instructions were appearing multiple times for the same order.	1197
Problem with not reporting an error to the <b>Third Party Application Errors</b> log for an order assigned to an inactive driver has been corrected.	2637
<p>The upload process for HHG was pulling the phone numbers for the Origin and Destination information from the Consignee/Consignor fields only. The process will now check the Home Phone number associated to the Moving From and Moving To addresses to set for the Origin and Destination contact phone numbers. If either is not set, then the application will check the Consignee/Consignor and use the Contact Phone numbers, if provided.</p> <p><b>Note:</b> UniGroup only accepts phone numbers in US format. Phone numbers in other formats will not be included in an upload.</p>	2316
VIN was being exported as the wrong data type and produced an <i>XML does not match the required UniGroup format</i> error.	2335
Memo Pad upload was returning validation errors on seemingly unrelated data.	1540 1629

## Administrative Changes

This section highlights the changes that specifically affect the administrative settings of the MoversSuite application.

### Mover's Suite Administration Changes

Fix or Enhancement Description	Ref. #
Is <b>Long Distance</b> flag appeared to be set when in fact it is not by default. This was occurring when the Labor Type was created within the Item Code Generation tool and viewed through the <b>MMS &gt; General &gt; Labor Type</b> setup.	2430

### MoversSuite Administration (Web) Changes

Fix or Enhancement Description	Ref. #
A new setup area was added to MoversSuite Administration (web) titled <b>Collections</b> . It contains administrative areas for the AR Credit & Collections module. Refer to <a href="#">AR Credit &amp; Collections Setup and Administration</a> . New roles were also added for this project. Refer to the <a href="#">Available Administrative User Roles</a> for a listing.	2585
Branch contact address information was not appearing when switching tabs in <b>Branch Setup</b> .	2421

## Bug Fixes and Patch Information for 3.10

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This section includes information on bugs fixes and patches that have been built upon the general release of version 3.10 of MoversSuite.

**None currently defined.**