MoversSuite Version 2021 R04

RELEASE DATE: February 22, 2021

▶ **Watch the Overview Video for this release**

Version 2021 R04 Notices

This section lists important notices related to MoversSuite.

COVID-19 Updates

Get the latest updates on COVID-19 and EWS Group's response on it at COVID-19 Information or read our blog https://ewsgroup.com/blog/covid-19-information-and-links/. Also, read ISV Solution for GP and their blog on several things you can learn in terms of fraud, payroll, working from home, etc. at https://www.greenshades.com/blog/.

End of Crystal Reports

MoversSuite does not support Crystal Reports anymore as methodically indicated in the notices section of our previous releases. However, you can continue to run these reports outside of MoversSuite and still link to MoversSuite data.

For those of you with custom Work Tickets created in Crystal Reports, we do offer two options to continue to generate Work Ticket reports through MoversSuite:

1. Option one is to switch the report in Report Setup to one of the MoversSuite provided Work Tickets reports. These are Reporting Services documents and are already in use by a large number of companies. Refer to the Work Ticket Report and Report Setup topics for additional information.
2. A second option is to create your own custom Work Tickets through Forms Designer. You can view the Custom Work Tickets topic to learn more about this option.

The default Work Ticket Report will continue to be available as it is for any of you who do not utilize Crystal Reports.

Version 2021 R04 Summary

The following is a table contains counts of the items affecting this release.

#	Change Summary
1	New Product Features
1	Release Enhancements
2	Release Fixes
5	Schema Changes (tables affected)
1	Admin Changes
	Standard Reports Affected

Release Hyperlinks:

Printable Release Notes
System Requirements
Release Highlights

▶ **Watch the Overview Video for this release**

Other Hyperlinks:

Open the Online Support Page
Access our Product Feedback Site
Release Highlights
Release Overview Videos

Version 2021 R04 Features

This section lists the features added to MoversSuite.

▶ **Watch the Overview Video for this release**

Document Storage Management

A new setup area by the name of Document Storage Management Setup has been added under the **Administration** category of your MoversSuite Admin tool for an effective management of your documents databases.
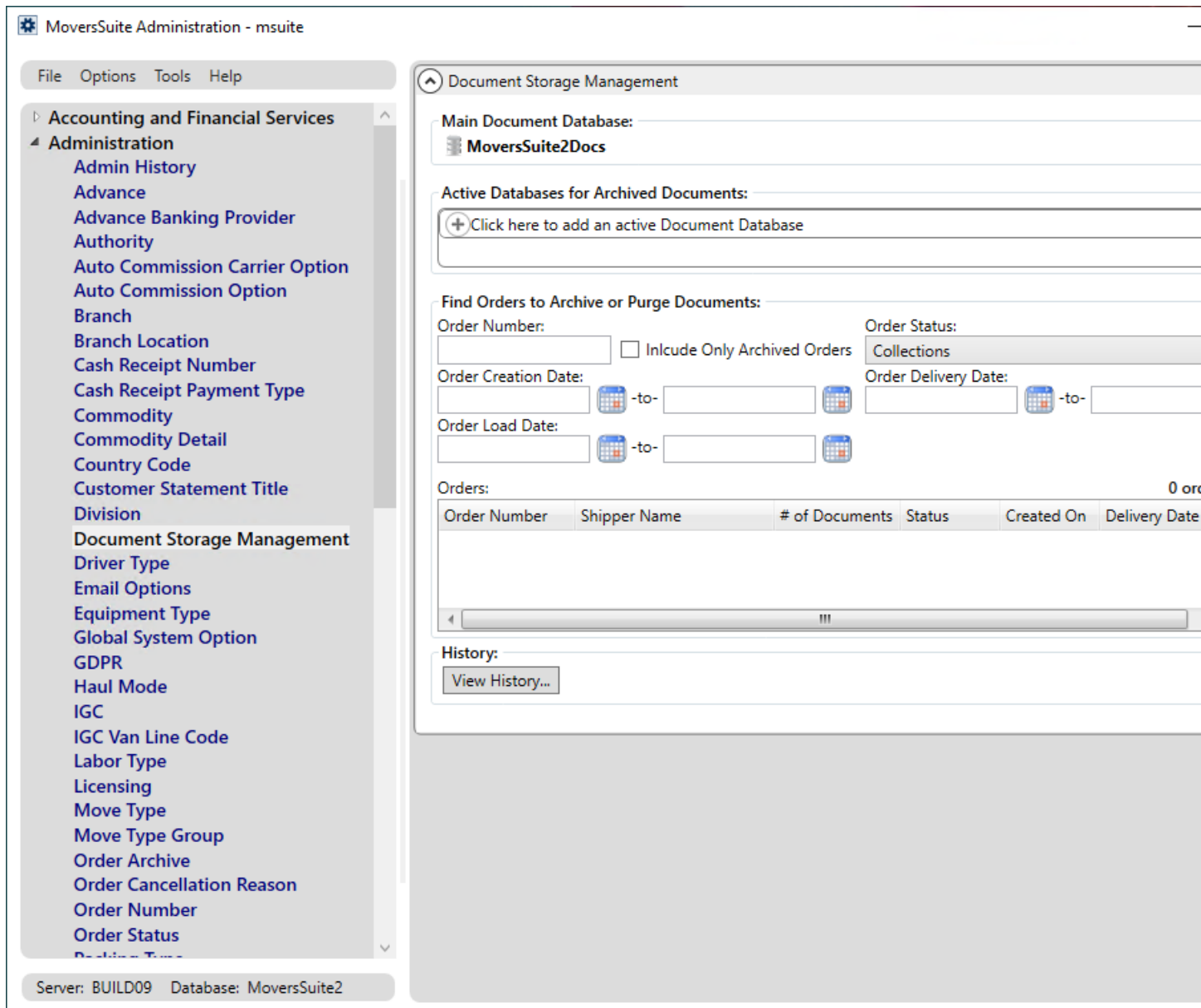

Figure 1: Document Storage Management Setup

With this feature, administrators can either archive the excessively space occupying documents from their main documents database or purge the unwanted documents altogether. Shedding the load off the main documents database helps you easily perform operations over it and speeds up the backup and upgrade processes.

IMPORTANT
The main document database that is connected to your MoversSuite application is auto loaded under the **Main Document Database** section of the Document Storage Management Setup screen. In this case, the main documents database is *MoversSuite2Docs* as seen in the Figure 1.

Process Flow

To be able to access this screen, administrators must be assigned the "Document Storage Management" role within Admin Profile Setup (Personnel > Admin Profile).
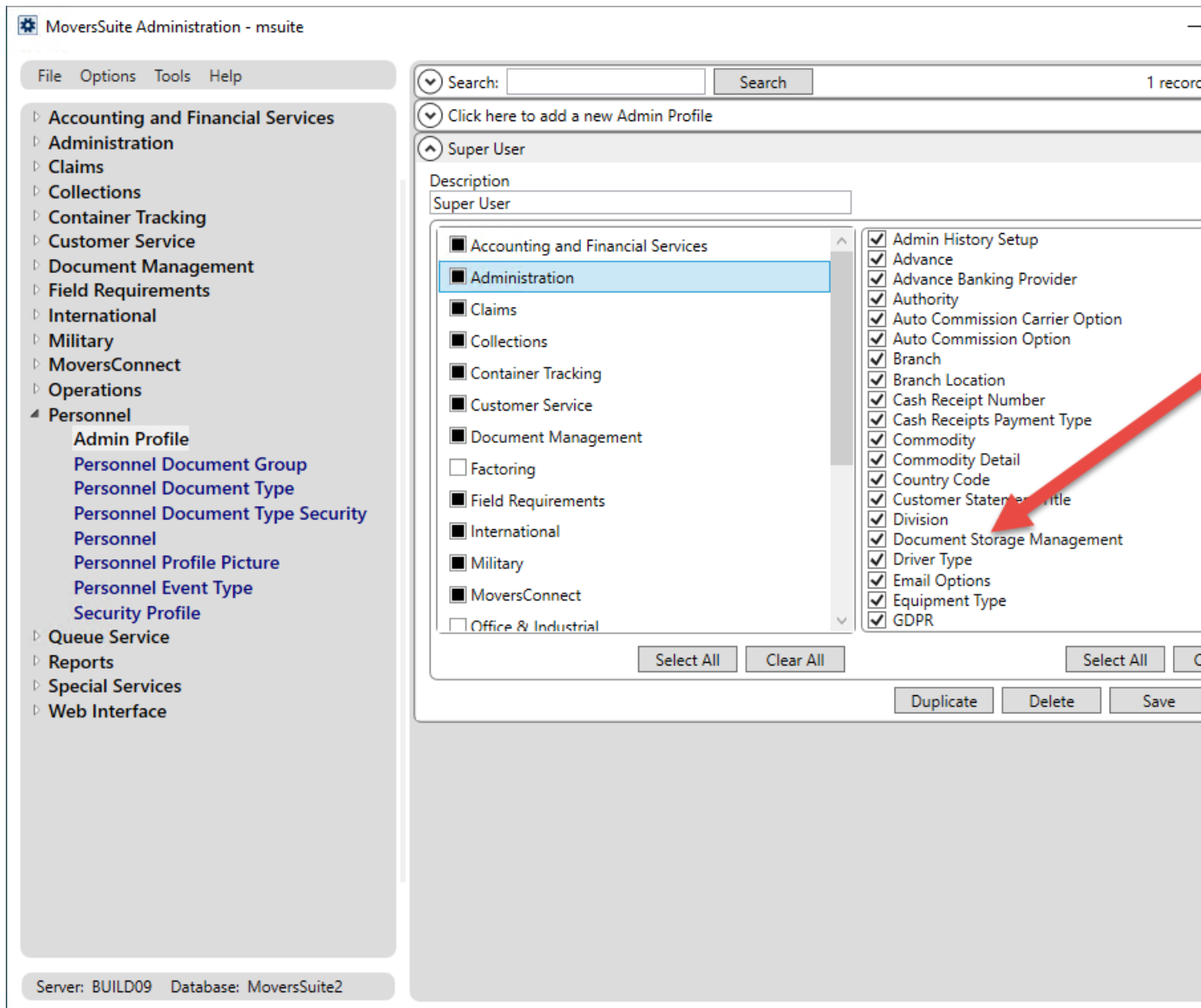
Figure 2: Admin Profile Setup

The **Active Databases for Archived Documents** section lists the databases that you have archived documents to. If you have not yet archived any documents, you will not see anything in this list yet. Refer to the Add Active Database for Archiving topic to know more on how to add new databases and activate existing ones.
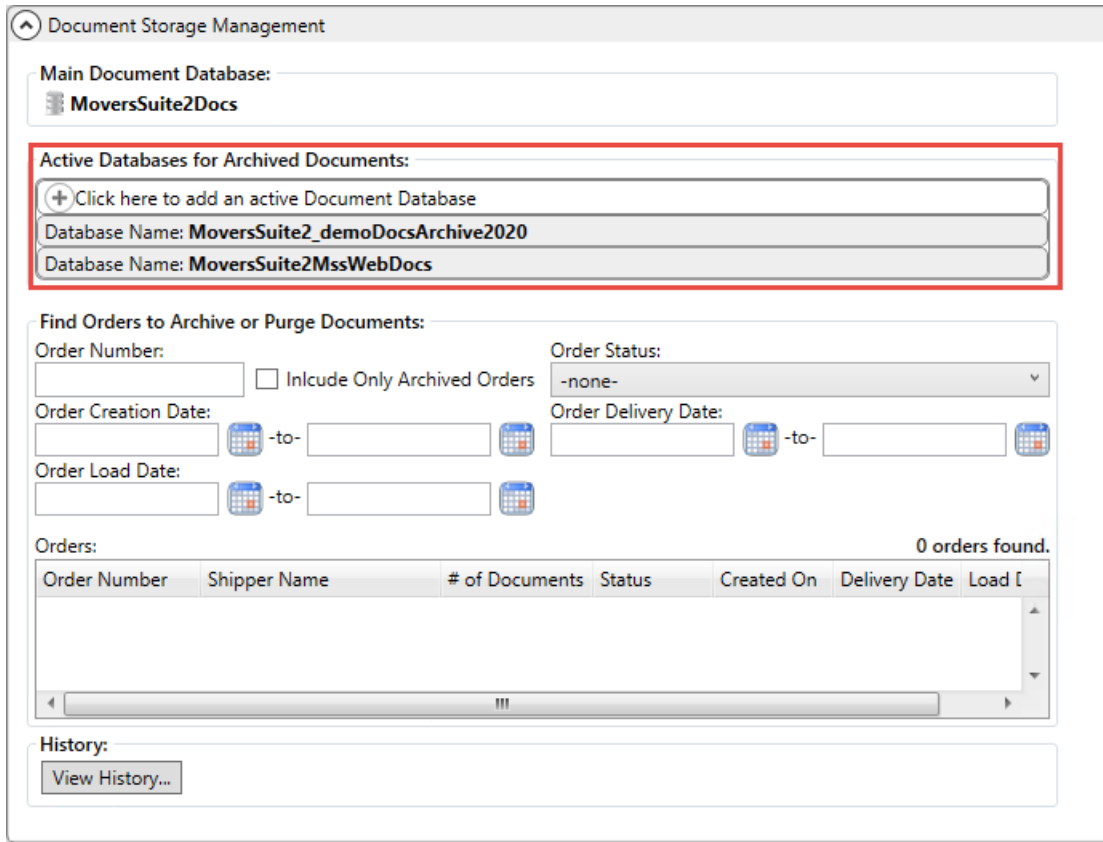
Figure 3: Document Storage Management Setup

Documents residing in these archived document databases, listed under the "Active Databases for Archived Documents" can be viewed through the Document Management Viewer just like for the non-archived documents.

If you de-activate an archived database from the list through the right-click option, then these documents are considered deleted and you will not be able to download them. However, you can still view them through the Document Management Viewer like before.
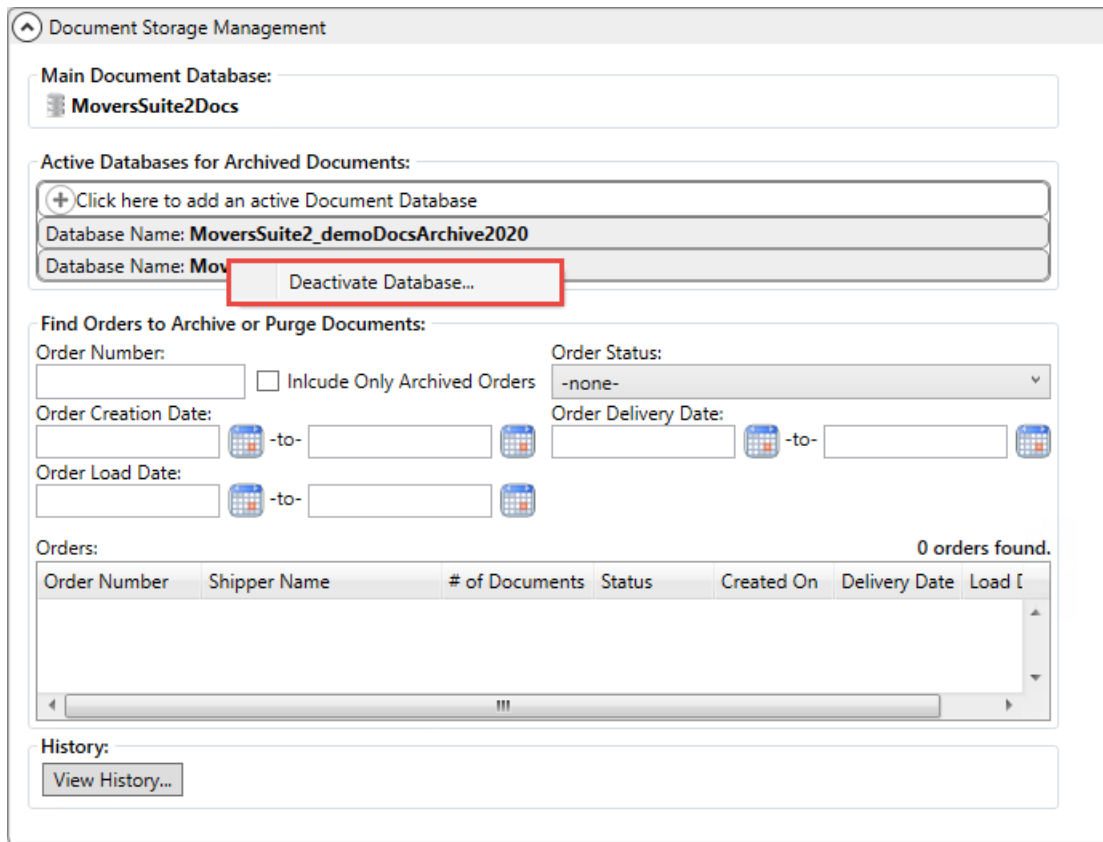
Figure 4: Document Storage Management Setup

Upon deactivating a database, you will be prompted with a warning that tells you that you will not be able to download the contents of the deactivated databases. Press OK to continue.
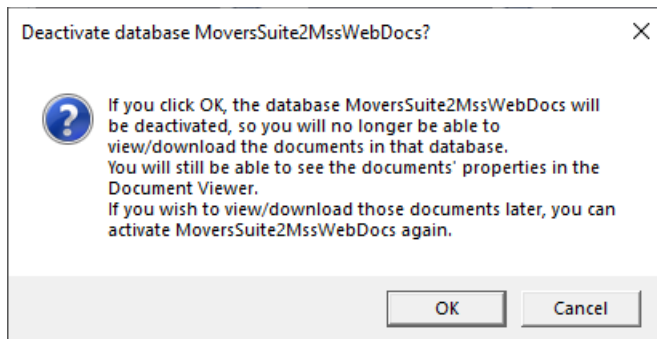

Figure 5: Deactivate Database Warning

Whether you want to archive your documents or purge them, you can use the below-mentioned six filtering options to narrow down your search results:

1. Order Number (minimum 3 characters required)
2. Include Only Archived Orders
3. Order Status
4. Order Creation Date (To and From)
5. Order Delivery Date (To and From)
6. Order Load Date (To and From)

Use one or more of these filter options to build a list of orders to archive or purge. Once a search is evoked, a count of qualifying orders displays at the 'Orders' grid. Once you have a list of documents, then the options to Archive Documents or Purge Documents become available to you.

Refer to the Find Orders to Archive or Purge Documents topic for further details on using these filters.

NOTE: Checkmark the "Include Only Archived Orders" flag to search only the orders marked as Archived in MoversSuite. The orders will appear having a "[A]" sign appended to their order number. Also, orders with active storage are included in the search for you to keep all the pertinent documents, such as invoices, for active customers.

Archive Documents

For archiving your main document database, you need to have at least one active document database under the "Active Databases for Archived Documents" listing. Whether you have deactivated your existing databases or want to create a new database altogether, you can do so through the Add Active Database for Archiving process.

Add Active Database for Archiving

Click the "Click here to add an active Document Database" button. You will get a prompt letting you choose between:

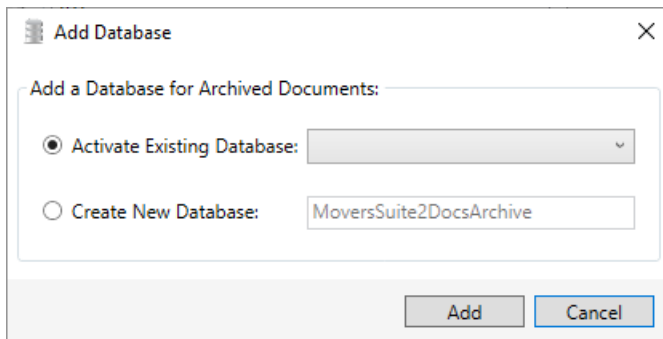1. Activate Existing Database
2. Create New Database

Figure 6: Add Database prompt

For those, who wish to re-activate any existing databases, can choose the "Activate Existing Database" option and select the desired database.

If you are using the feature for the first time, you can choose the "Create New Database" option and name it as you wish. You can use the standardized nomenclature as hinted in the field.

Technical Notes for 'Add Database' dialog
• This is a data-sensitive feature and if you don't have adequate system privileges, you will have to consult your SQL administrators to build an archiving database for you and have it linked through this feature.

- The application uses the Windows login credentials of the admin user to determine their security level.
- Moving or removing data does not remove the memory allocated and the databases should be compressed after archiving or purging.
- For Azure customers, it is recommended to open a Help Desk ticket for our Technical Team to build them an archiving database.

With orders narrowed down to your desired results and at least one active database for archived documents in place, you can hit the Archive Documents button below the Orders grid, and you will be prompted to select a database.
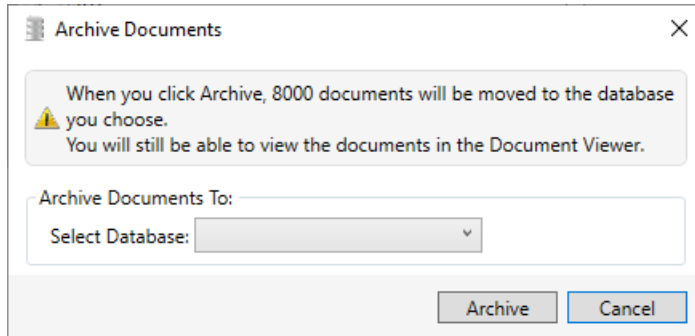

Figure 7: Archive Documents screen

The dropdown contains all the active databases so you can select one and click Archive. The prompt will update you when the process is complete.

Purge Documents

For purging the unwanted documents, use the filters to narrow down your search results for orders grid and click Purge Documents. As this is a permanent delete and an irreversible process, a warning is displayed for you to confirm the action.
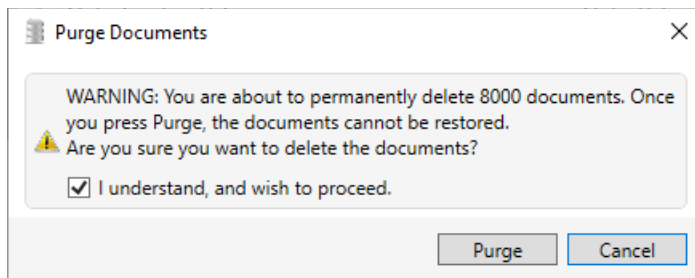

Figure 8: Purge Documents Warning

If you agree, checkmark the "I understand, and wish to proceed" flag and click 'Purge'. You will be updated when the purging process is complete.

IMPORTANT
Due to the data-sensitive module of this feature, it is recommended that an administrator user with full knowledge of how this action can affect your documents database, should perform this action.

Once you have performed archiving or purging action over a set of records, its history is logged and is accessible via **View History** button present at the bottom of the Document Storage Management Setup screen.

Figure 9: Document Storage Management Setup

When you click the **View History** button, a modal window by the name of Document Archive/Purge History appears showing you the details of all recent archives and purges.

Figure 10: History dialog

The fields displayed include the following.

- User
- Date/Time
- Action
- # of Documents
- Order No. Search
- Order Status
- Created Date Start
- Created Date End
- Load Date Start
- Load Date End
- Delivery Date Start
- Include Only Archived
- Docs Moved From
- Docs Moved To

These columns display the values provided by administrators, against which the results were obtained.

Refer to the Document Storage Management Setup, Archive Documents, Purge Documents topics for more details.

SUMMARY (4954)
Document Storage Management Setup feature added.
The following areas have been affected by this change:

Version 2021 R04 Enhancements

No new enhancements added in this release.

▶ Watch the Overview Video for this release

Manual Electronic Payment Batches Added for Cash Receipts and Payment Management

MoversSuite now allows users to move payments from existing cash receipt batches to manually created "Electronic Payments Only" batches. Users can create new electronic payment batches using both the Cash Receipts module and Payment Management module. For this purpose, a checkbox by the name of "Is Electronic Payments Batch" has been added in:
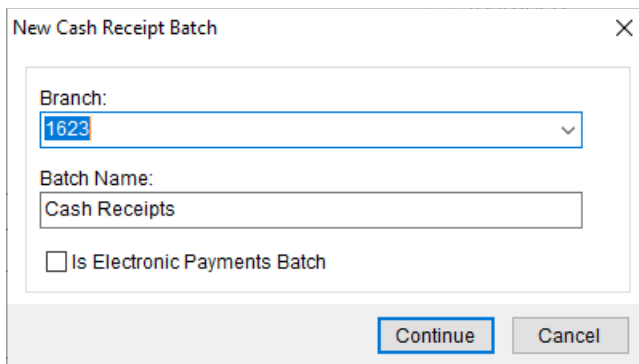
1. New Cash Receipt Batch screen

Figure 11: New Cash Receipt Batch screen
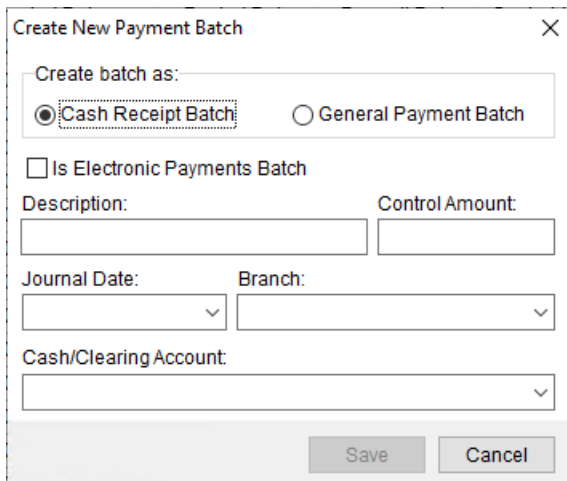
2. Create New Batch screen

Figure 12: Create New Batch screen

For this feature to work, users need to have full access to *Electronic Payments* and *Cash Receipts* security modules in their Security Profile Setup. Also, the Electronic Payments feature must be activated.

Cash Receipts

In the Cash Receipts module, the feature can be used as indicated below:

1. Click the "New" button.
2. Specify a Branch and provide a name for the batch. Appending the name with "Electronic" and "Non-Electronic" helps you quickly identify the batch type.
3. If you are creating the batch for electronic payments, check mark the "Is Electronic Payments Batch" checkbox and press Continue.

Figure 13: New Cash Receipt Batch screen

4. An informational message dialog will appear saying "Your new electronic payments batch has been created. You can now move electronic payment cash receipts to this batch."
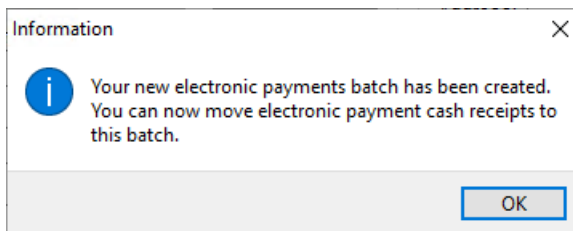
Figure 14: Information prompt

5. Click the OK button.
6. If the new 'Is Electronic Payments Batch' checkbox is NOT checked, then the cash receipts module continues as it has in the past by letting the user add a new cash receipt to the new batch.

Follow these steps to move the electronic payment cash receipts to your new electronic payments batch via the Cash Receipts module:

1. Find the electronic payment cash receipt that you want to move to the newly created batch.
2. Edit the cash receipt and select a different batch. Note that the Batch drop down will only show Electronic Payments batches in this case.
3. Click the Save button.

4. Once the cash receipt is moved to a different batch, the **Void Receipt** and **Refund Receipt** buttons will allow you to perform those actions just as if you did not move the cash receipt.

NOTE
If you wish to move non-electronic payment cash receipts to a different batch or while adding new manual cash receipts, the Batch dropdown will only show non-Electronic Payments batches.

Payment Management

In the Payment Management module, when you click the "New" button to open the Create New Batch screen, checkmark the newly added "Is Electronic Payments Batch" checkbox. Fill the rest of the fields as before and save it to create the new batch as an electronic payments batch.

Figure 15: Create New Payment Batch

NOTE
This checkbox is only available for a **Cash Receipts** batch type. On General Payments batches, the new checkbox is disabled and is automatically unchecked.

Refer to the Cash Receipts and Payment Management topics for more details.

SUMMARY (6004)
Manual electronic payment batches added for Cash Receipts and Payment Management.
The following areas have been affected by this change: Cash Receipts Payment Management Create New Batch New Cash Receipt Batch

Version 2021 R04 Fixes

This section lists the bug fixes made to MoversSuite.

 Watch the Overview Video for this release

Document Management

Documents easily replaced without producing errors

In the Document Management Viewer, a document can now be replaced with another document without producing errors. Previously, replacing a document was producing an SQL error, obstructing the process.
REFERENCE: MOV-6169

Online Payments

Online web payments use the actual web transaction date

The online web payments mechanism has been tweaked to use the actual web transaction date when it looks for a MoversSuite cash receipts payment batch to add the online payment to. Previously, it would assume that the payment occurred on the date it was downloaded and processed.
REFERENCE: MOV-6134

Version 2021 R04 Database Changes

Schema Changes Version 2021R04

The following links allow you to navigate through all MoversSuite tables and data views and allows you to view field properties, such as type and maximum value size, etc.:

MoversSuite Database Tables (2021R04)
MoversSuite Document Database Tables (2021R04)
MoversSuite Data Views (2021R04)

Version 2021 R04 Release Requirements

Please refer to the following information regarding the hardware and software required to support MoversSuite and related systems.

> View the MoversSuite System Compatibility topic for a list of products that are compatible with MoversSuite.

> Refer to the System Requirements section for a complete list of hardware and software requirements.

Browser Version Requirements for QuickBooks Online Connection Authorization

Due to security requirements, only Chromium-based embedded browsers such as Google Chrome, Mozilla Firefox, Microsoft Edge, and Safari (11+) are supported for QuickBooks Online Connection Authorization screens. This is for the users who first turn the QuickBooks feature on. Or, in case, the feature is being used after a long while. Refer to this blog for further details on changes made.

The Internet Explorer 11-based embedded browsers are not compatible for the authorization purpose.

Browser Security Requirements for Credit Card Payments

With recent changes to support TLS 1.2 encryption protocol enforced by the credit card and banking industries, your internet browser must support TSL 1.2 encryption to process Electronic and Online Payments. Refer to the Browser Security Settings topic for more information on this requirement on how to test your browser.

MSCrew 2.0 Requires MoversSuite 2018 R10 or Higher

The MSCrew Version 2.0 requires that MoversSuite should be on Version 2018 R10 or higher to support the changes included with the latest mobile application. More information will come in future updates of MoversSuite as the rollout date for MSCrew Version 2.0 nears.

New MoversSuite WebApiService

An additional web service will run after you upgrade to Version 2018 R09 of MoversSuite or later version. The new service is titled "WebApiService –" followed by your company name. If you have issues connecting to the API service after you upgrade, verify that this, and other MoversSuite services, are running on your application server.

Microsoft SQL Server 2008 and SQL Server 2008 R2 Compatibility

With version 2017 R11 of MoversSuite, the development environment of MoversSuite is no longer compatible with Microsoft SQL Server 2008 or SQL Server 2008 R2.

As of May 22, 2017, the lowest compatible database server hosting MoversSuite will be Microsoft SQL Server 2012. **IMPORTANT:** If you wish to upgrade to MoversSuite 2017 R11 or a later version of MoversSuite, your company must, at a minimum, have Microsoft SQL Server 2012 or higher (see the *Microsoft SQL Server 2016 Compatibility* announcement).

Of note, being current on the latest versions of the hardware and software for our development environment allows us to provide better security, better support, and a better MoversSuite user experience. Please refer to our System Requirements for more information on the hardware and software compatible with MoversSuite.

Contact our EWS Support team to discuss migration options.

Windows Domain Authentication to log into MoversSuite

With the release of MoversSuite Version 2017 R08, you get the ability to open MoversSuite by using the credentials you enter when logging into your Windows environment. MoversSuite references the user identity associated to your Windows account to retrieve your MoversSuite login information. Then, when you launch MoversSuite or MoversSuite Administration, it opens without you having to enter your MoversSuite username and password.

> **IMPORTANT:** If your company is not utilizing Windows Domain Authentication, then you will be unable to upgrade to version 2017 R08 or later. (8638)

IBM MQ Client 8.0.0.X

For all UniGroup agents, UniGroup requires IBM MQ Client 8.0.0.X. If you upgrade on your own and want to download this latest version of IBM MQ Client, then you can do so through this link: http://www-01.ibm.com/support/docview.wss?uid=swg24037500#1.

Microsoft SQL Server 2016 Compatibility

As of MoversSuite 2017 R04, the MoversSuite development environment is compatible with Microsoft SQL Server 2016.

Refer to our System Requirements for more information on the hardware and software compatible with MoversSuite.

Please contact our EWS Sales team to discuss upgrade options.

Microsoft Windows Server 2016 Compatibility

As of MoversSuite 2017 R04, MoversSuite is compatible with Microsoft Windows Server 2016.

Refer to our System Requirements for more information on the hardware and software compatible with MoversSuite.

Please contact our EWS Sales team to discuss upgrade options.

Dynamics GP Requirements

MoversSuite is compatible with the following:

- Microsoft Dynamics GP 18 series (with custom code for correct series) **(**)**
- Microsoft Dynamics GP 2016 R2 (with ATIP Build 16.0.2) **(*)**

**- Microsoft SQL Server 2014 or higher is required
* - Microsoft SQL Server 2012 or higher is required

Additional considerations can be found by viewing the information available rein the following links:
System Requirements for Microsoft Dynamics GP 2018
System Requirements for Microsoft Dynamics GP 2016

Version 2021 R04 Known Issues

The following issues are problems that may affect your decision to upgrade to this version of MoversSuite. The following issues are not resolved for this release.

SIRVA sHub Changes Affecting Users

SIRVA sHub Replacement changes made at MoversSuite Version 2020 R17 can affect those working with SIRVA and MoversSuite. New connections now exist between MoversSuite and the SIRVA STS (API) system, which replaces SIRVA sHub, therefore your existing login may not have suitable permissions to register shipments, pull orders down, etc. from SIRVA. So, please contact EWS Group support so that we can verify that your login credentials are linked to MoversConnect and that they have the correct permissions.

Multiple Email Addresses: Response Emails Returned on Credit Card Payments

Multiple Email Addresses changes made at MoversSuite Version 2020 R17 are causing issues with response emails returned for credit card payments. We also discovered that many users were sticking two or more email addresses in the same email field for an order record. These "extra" email addresses resulted in verification errors if the order was edited after upgrading to R17. These issues will be fixed in MoversSuite Version 2020 R19.

Admin History Logging Updates

Admin History and Logging at MoversSuite Version 2020 R14 are causing a draft record to be saved even after a new payment attempt is cancelled. Having these drafts exist are causing, "A new payment on this batch is incomplete" errors (#830) and are preventing people from finishing the apply process of a payment. This issue will be fixed in MoversSuite Version 2020 R19.

QuickBooks Support for IE11 Deprecating for Authorization Screens (September 8, 2020)

Due to security requirements, starting Sept. 8, 2020, only Chromium-based embedded browsers will be supported for **QuickBooks Online Connection Authorization** screens and Internet Explorer 11-based embedded browsers will no longer work.

For authorization process in MoversSuite, the previous two versions of Google Chrome, Mozilla Firefox, Microsoft Edge, and Safari (11+) are supported. This is for the users who first turn the QuickBooks feature on. Or, in case, the feature is being used after a long while. Refer to this blog for further details on changes made.

Supported Windows Themes

Related to the scaling issue (listed below), MoversSuite recommends that if your client server is on Windows 10, that you avoid using themes developed for earlier versions of Windows, such as the Aero theme which was developed for Windows 7. In other words, please load and use themes developed for the current version of Windows that you are on.

> **NOTE:** The Aero theme works well with Windows Server 2008 R2. Reference the following video as a guide to installing the theme service and theme itself:
> https://www.youtube.com/watch?v=Q_8VopNXVhE

Here is a link to additional information on Desktop Themes:
https://support.microsoft.com/en-us/help/13768/desktop-themes-featured

Screen scaling not available with MoversSuite

With the advances in screen size and resolution, many underlying applications are not able to deal with all the variations in configurations available to the variety of high definition (HD) screens. Due to this limitation, MoversSuite cannot scale as desired in all situations. Many of you may have purchased HD monitors and have seen issues such as not being able to read field labels, etc.

Until there is a better solution to scaling, EWS Group recommends that if you experience scaling problems with the MoversSuite application keep the size of your application to 100% and change the resolution as desired.

On Windows machines, you can verify and/or update the display settings as follows:
1. Right-click somewhere on your desktop and select **Display Settings**
2. Set the **Change the size of text, apps, and other items** to 100%.
3. Click on **Apply** to save the changes.
4. Click on **Advanced display settings**.
5. Make changes to the **Resolution** as needed.
6. Click on **Apply** to save the changes.
7. Close the screen by pressing the **X** in the upper right-hand corner of the screen.

UPDATE:
With the release of MoversSuite 2018 R15, a solution has been implemented to address many of the issues involving scaling. (3705, 4114)

Citrix issue with phone number control

An issue that cannot be replicated is causing the phone numbers within the *Shipper Contact Information* section (Name, Address, Phone tab) to disappear and then reappear when you click on that section, however, the user cannot edit them until they press Cancel (on the order) and then attempt to Edit again. (6409)