MoversSuite Version 2021 R08

RELEASE DATE: April 19, 2021

Watch the Overview Video for this release

Version 2021 R08 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 R08 Summary

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

#	Change Summary
1	New Product Features
6	Release Enhancements
10	Release Fixes
6	Schema Changes (tables affected)
2	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 R08 Features

This section lists the features added to MoversSuite.

Watch the Overview Video for this release

Payment Management Payment Aware

When applying payments within Payment Management, you can now view payments made from other payments, even if the payment is from a different batch, receipt, or order. These payments now show in a new data column titled **Other Apply** that is visible from within the grid when applying payments through the Payment Application screen.

Figure 1: Payment Application screen

This is designed to help you recognize payments that could potentially be made on the same order and document and that can cause errors when importing and posting through Microsoft Dynamics GP.

When applying a payment by a service, you can find the Other Apply information from the Apply By Service dialog as well.

Figure 2: Apply By Service dialog

If you wish to see where the Other Apply amounts originate, you can do so through a new Other Applied Payments dialog.

Figure 3: Other Applied Payment dialog

This dialog is available by right-clicking on the amount you wish to view data for and choosing **Show Other Apply Payments Window**.
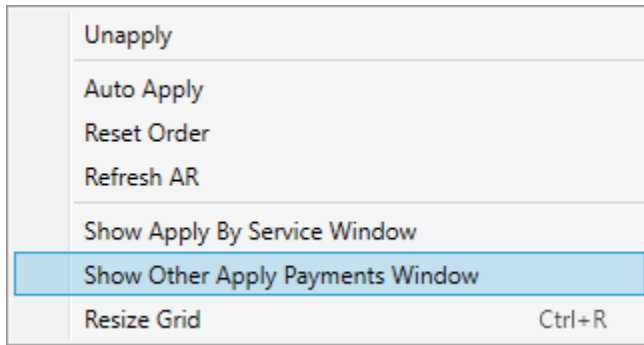
Figure 4: Right-click options within Payment Application

This option is available through the right-click menu from Existing AR grid within the main Payment Application window as well as from the Apply By Service dialog.

This feature is available for items that are manually applied as well as those auto-applied through a van line import.

Refer to the Other Applied Payments and Payment Management topics for more details.

SUMMARY (5745, 6209)
Payment Management Payment Aware feature now available.
The following areas have been affected by this change: 　　　Apply by Service 　　　Other Applied Payments 　　　Payment Application 　　　Payment Management 　　　Schema Changes Version 2021R07

Version 2021 R08 Enhancements

This section lists the enhancements made to MoversSuite.

▶ Watch the Overview Video for this release

Report Viewer Updates to Improve Performance

The Report Viewer has been updated to utilize a built-in document reader instead of relying on support for Adobe Acrobat or other default reader needing to be loaded on your system. The new reader works the same way as the prior reader did along with all the same features. You should not see a difference when viewing documents through the updated Report Viewer.

Report Viewer

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☑ 🖨	10523- - -/1005
☑ 🖨	10826- - -/1006
☑ 📨	1623-235-21/1009
☑ 🖨	N04-1-09/1008
☑ 🖨	N04-74-08/1007

EWS Group Moving & St
740 Horizon Court, Suite 340
Grand Junction, CO 81506

(970) 256-1616

Invoice Date: 3/24/2021
Invoice #: 1009
Order #: 1623-235-21
Customer #: 12658

Amoun

Move Management, Inc
16346 East Airport Circle
Aurora, CO 80011
United States

— — — — — — — — — — — — — — — — — —

Please detach and return this portion with your payme

Invoice Date: 3/24/2021	EWS Group Moving & Storage
Invoice #: 1009	740 Horizon Court, Suite 340
Order #: 1623-235-21	Grand Junction, CO 81506
Customer #: 12658	(970) 256-1616

Shipper: Shipper, Joe	**Salesperson:** Cahill, Heather
Origin: 454 Main Street	**Destination:** One Stop Moving
Grand Junction, CO 81505	Palisade, CO 8152
United States of America	United States of A

Item #	Description		Quantity	Quantity
02/01/21-02/28/21 Perm Storage				

Item #	Description	Quantity	Quantity	Rate
584	02/01/21-02/28/21 Montlhy Perm Storage		150.00 qty	3.6575
584	02/01/21-02/28/21 Montlhy Perm Storage		3.00 qty	1.00

A

Figure 5: Sample storage invoice in Report Viewer

A new option is available to the Report Viewer that allows you to control how documents load into the reader pane. The 👁 option displays as part of the report selection options and allows you to control whether documents load in the viewer pane or not by default.

☑ ☐ ☑ ☑ 💾 🖨 ✉ 👁

Viewing Document Options:

👁	View Documents: Selected reports load in the viewer pane.
🚫	Do Not View Documents: Selected reports do not load in the viewer pane by default.

If you wish to view just some of the documents without loading all of them, you can:
1. Deselect the option (🚫)
2. Check just the items you wish to view
3. Then select the option to load just those selected documents (👁)

The application stores the option you select when you exist the viewer. So, if you have the option deselected (🚫), then the next time you access the Report Viewer the option will be deselected. This can save you quite a bit of time when managing a lot of invoices during a storage billing run, for example.

Note that this option is only available when multiple reports are generated. If you are viewing just a single report, then the option is not available.

Refer to the Report Viewer topic for more details.

SUMMARY (5842)
Report Viewer: Control added for rendering selective reports.
The following areas have been affected by this change:
Report Viewer
Global System Options

Customer Statements: Improve Emailing Options

Several improvements have been made to improve emailing Customer Statements.

First off, you now have access to new Report Viewer options allowing you hide ✎ or display 👁 statements from loading in the view pane. Choosing to disable statements from loading ✎ can save time when viewing a large number of documents.
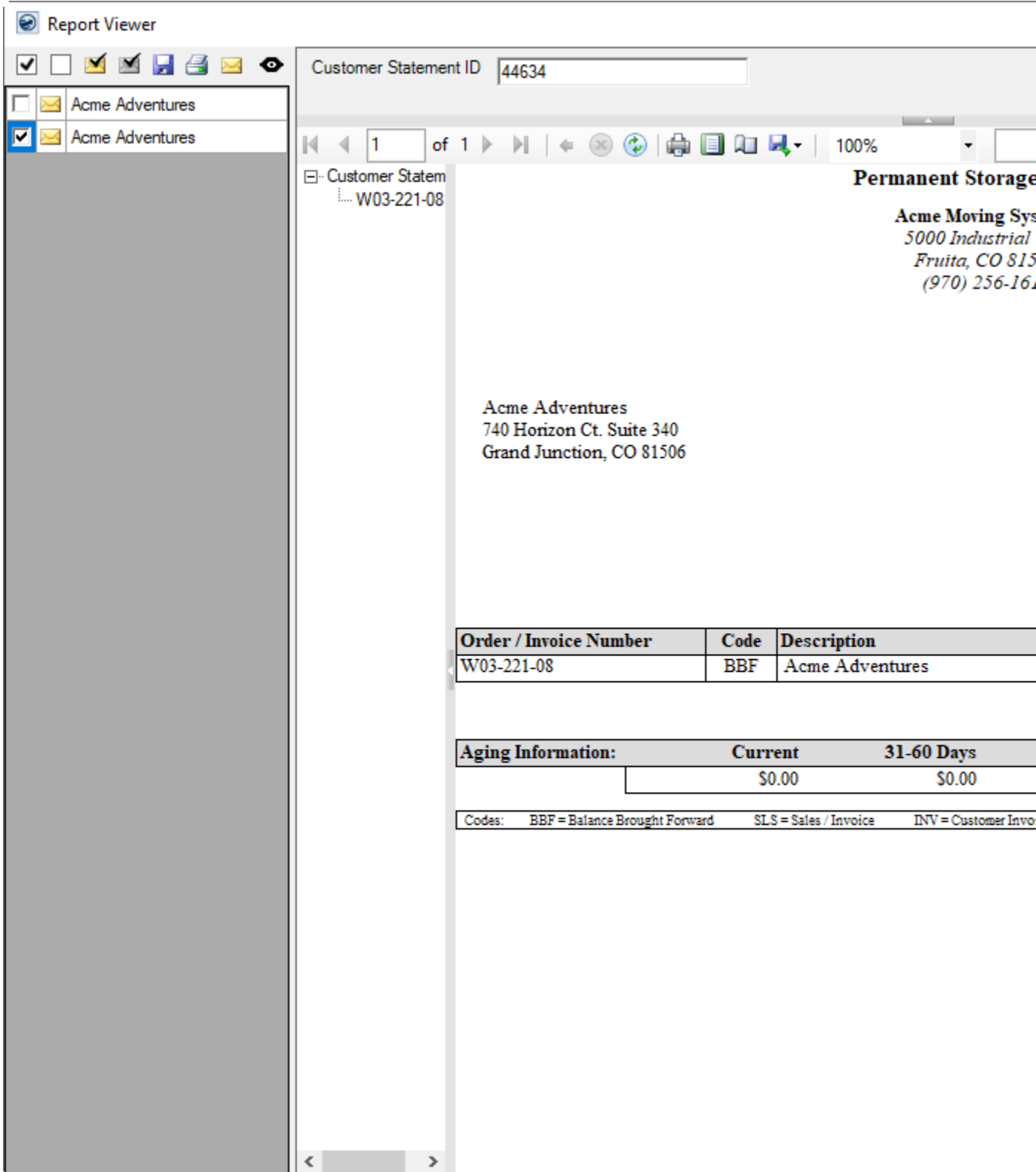
Figure 6: Report Viewer screen

Read the Report Viewer topic for additional information on these options.

The statement run and reprint options now pull the email address set for the customer within Microsoft Dynamics GP. If the email address is available, then the mail icon shows next to the customer within the selection pane of the Report Viewer.
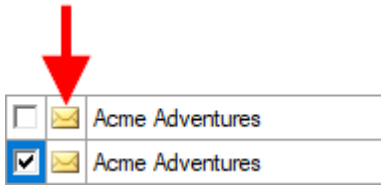
Reporting options available allow you send one or more emails at a time. If the email address is available to the customer, then it is set as the primary recipient on the statement email.
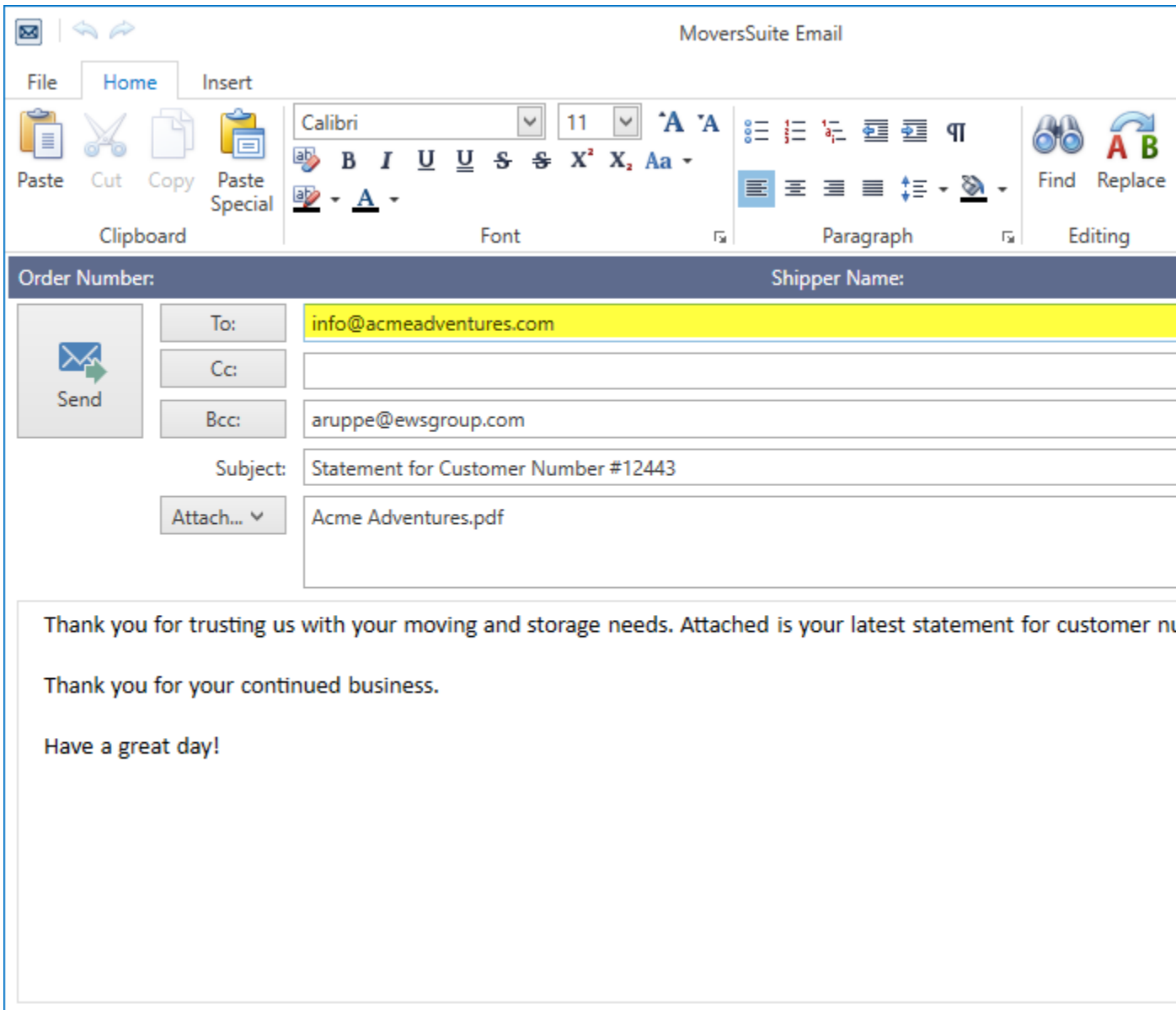
Figure 7: Sample email for a Customer Statement

NOTE: The email address for the customer pulled into Customer Statements is from the "PRIMARY" address record set for the customer in Microsoft Dynamics GP. The entry can be found through **Customer Maintenance** and then through **Internet Information**. Set the **E-mail** to a valid email address of up to 201 characters. You can specify multiple email addresses in the field provided they are separated by a comma or semi-colon.

Your company can now customize the subject and body of the statement email that goes out.

The System Email Setup, which lists under the *Accounting and Financial Services* category in the Admin Tool, offers you a new Customer Statements option to control what the email looks like. And, you have the ability to include the Customer Balance, Customer Name, and Customer Number within the text of the Subject or Email Message.

Figure 8: New Customer Statements options within System Email Setup

Refer to the following topics for additional information:
Customer Statements
Report Viewer
System Email Setup

SUMMARY (5754)
Customer Statements: Improved emailing options for customers

The following areas have been affected by this change:
 	
    Customer Statements
    Report Viewer
    System Email Setup
    Schema Changes Version 2021R08

Forms Designer: Locations Bookmarks Added

Three new bookmarks are available to reference locations set on a Local Service on an Office & Industrial order.

The following three bookmarks are available under the Local Services category within the Forms Designer Bookmarks listing.

Bookmark	Description
Additional Locations	This bookmark displays the address for each record selected within the **Select Location** dialog on a Local Service request through the Office & Industrial module.
	Data for this bookmark pulls from Locations established within the Contacts and Locations tab and includes the following;
	Location Description
	Contact
	Building
	Location Type
	Address
Destination Location	This bookmark displays the address for the **Destination Location** set within the Add Local Service on request created within the Office & Industrial module.
	Data for this bookmark pulls from **Locations** established within the Contacts and Locations tab and includes the following;
	Location Description
	Contact
	Building
	Location Type
	Address
Origin Location	This bookmark displays the address for the **Origin Location** set within the Add Local Service on request created within the Office & Industrial module.
	Data for this bookmark pulls from Locations established within the Contacts and Locations tab and includes the following;
	Location Description
	Contact
	Building
	Location Type
	Address

Each of the above bookmarks displays similar to the following example when rendered:

Location Description: Main Pickup: South Warehouse
Contact: Jeff Lynne
Building: South Warehouse

Location Type: Agent Warehouse
Address:
    5700 Warehouse Road
    Warehouse, WA 91390

Please note that these three bookmarks only render data from a service managed on an Office & Industrial move. They do work when generated through a Work Ticket form, but again, it must be an Office & Industrial order.

With this release, these three bookmarks are the only ones associated to the **Local Services** bookmark group, which is available when adding bookmarks to your forms through the Insert Bookmark dialog.
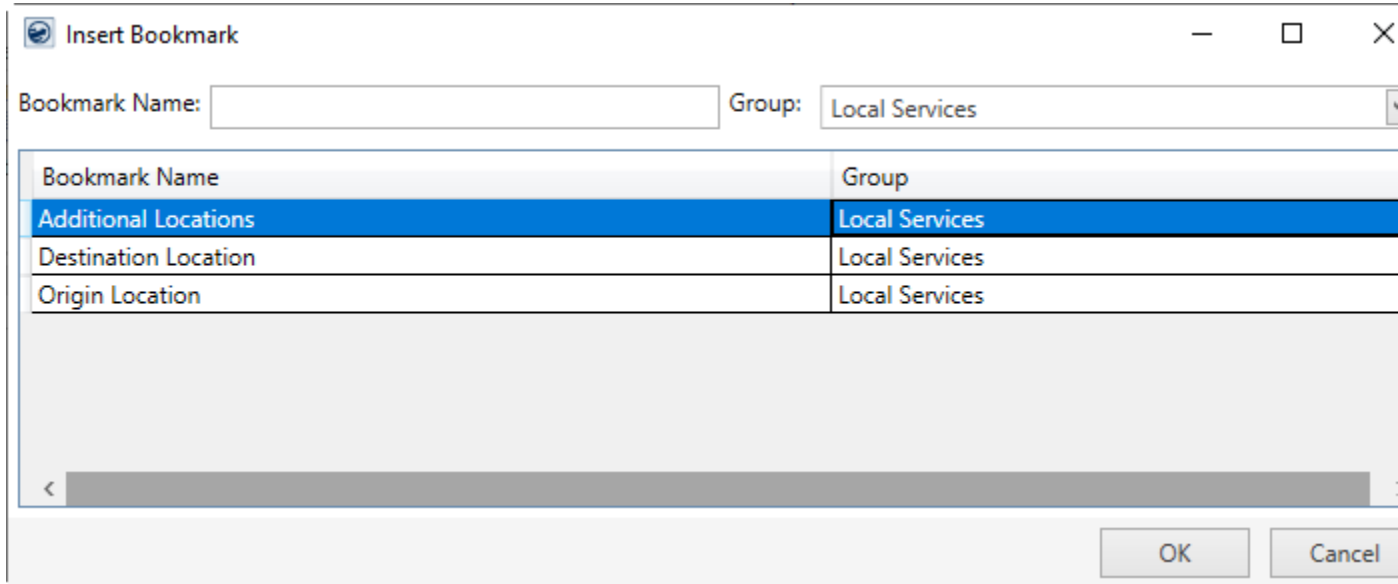
Figure 9: Insert Bookmark dialog

Prior to this release, there were a number of bookmarks attached to the Local Services group. However, these bookmarks truly only worked when rendered through the Work Ticket function, therefore they have been moved to their own group titled **Work Tickets**.
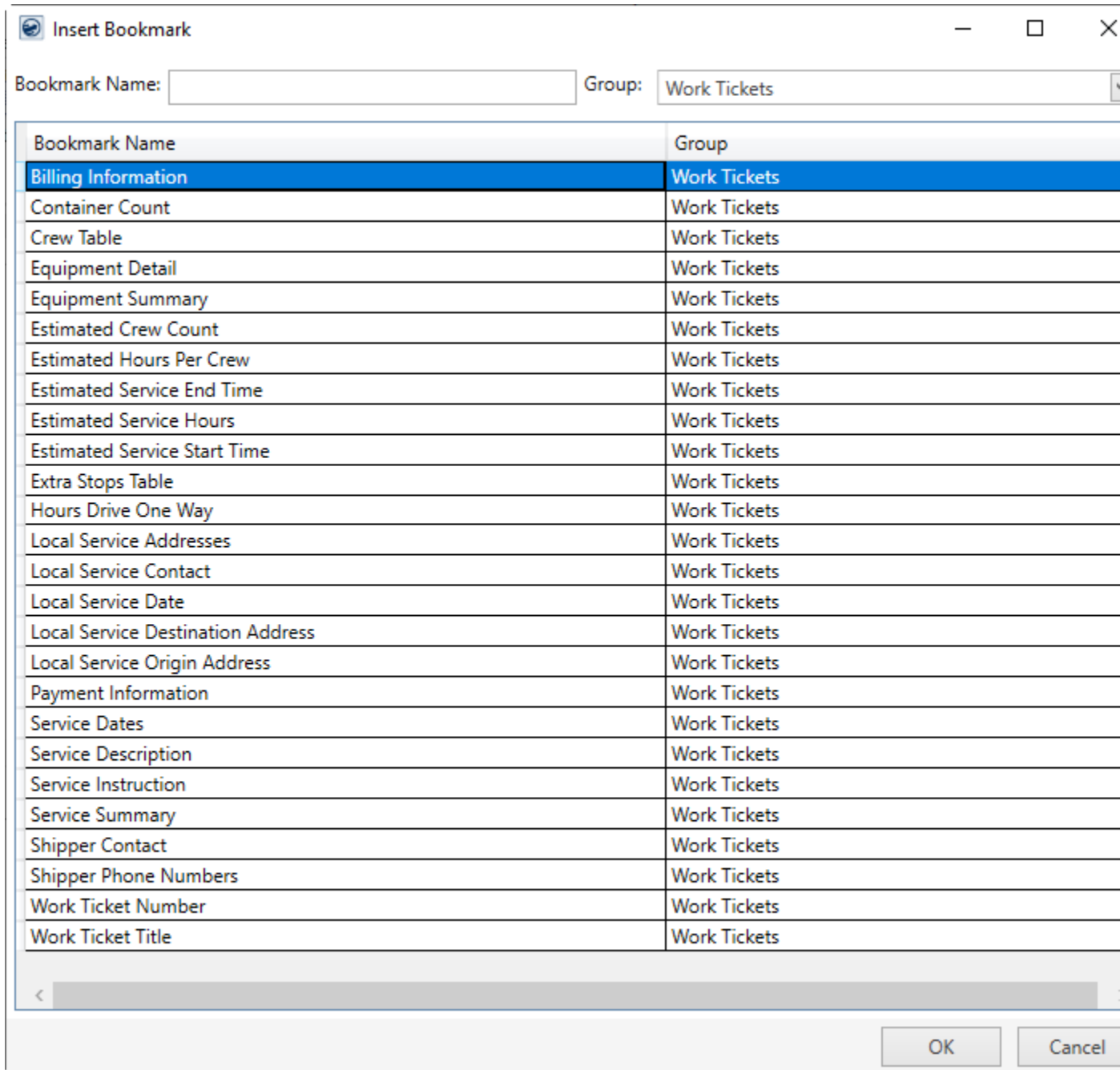
Figure 10: Insert Bookmark dialog

Any bookmark that was part of the Local Services group before and is now named Work Tickets will work as expected. You will not need to update your forms to re-add these. For example, if you referenced the "Service Dates (Local Services)" bookmark in your documents, then this bookmark will continue to work even though it is now named "Service Dates (Work Tickets)."

Reference the Local Services Bookmarks and Work Ticket Report Bookmarks topics for additional information.

Refer to the Forms Designer topic for an overview of bookmark usage.

SUMMARY (6170)

Forms Designer: New O&I Locations bookmarks added and new Work Tickets category defined.

The following areas have been affected by this change:

Forms Designer

Forms Designer Bookmarks

Local Services Bookmarks

Work Ticket Report Bookmarks

BI Tool Updates

The following improvements have been made to the Enterprise BI Views affecting any queries you may have within your Enterprise BI system.

Crew Actuals View

The following changes have been made to this view:

Column Name	Description
EstimatedWeight	New column displaying the Estimated Weight set on an order through the Move Information tab.
GPSIn	The location of each punch in now displays in this column along with the corresponding local start time. Each punch in location displays on a separate line within this column in the format [Start Time Local]: [GPS Latitude], [GPS Longitude].
GPSOut	The location of each punch out now displays in this column along with the corresponding local start time. Each punch out location displays on a separate line within this column in the format [Start Time Local]: [GPS Latitude], [GPS Longitude].
HauledWeight	New column displaying the Hauled Weight set on an order through the Move Information tab.

> **NOTE:** The GPSIn and GPSOut changes were implemented to correct an issue where multiple listings showed for each entry. Refer to the Fixes section below for more information.

Local Dispatch Grid View

The following changes have been made to this view:

Column Name	Description
CrewMemberFullList	Newly added column that lists of all crew on the service separated by a line feed. The role for each person displays next to their name. The lead appears at the top of the list.
Equipment	Updated the existing column to display each assigned resource separated by a line feed.
EquipmentRequests	Newly added column that lists of each requested item set on a service through Equipment Request displays separated by a line feed.
LaborRequests	Newly added column that lists of each requested item set on a service through Labor Request displays separated by a line feed.

Local Services View

The following changes have been made to this view:

Column Name	Description

EquipmentRequests	Newly added column that lists of each requested item set on a service through Equipment Request displays separated by a line feed.
LaborRequests	Newly added column that lists of each requested item set on a service through Labor Request displays separated by a line feed.

Refer to the BI Tool and Enterprise BI Views topics for more details.

SUMMARY (5767, 6153, 6163)
BI Tool view data updated
The following areas have been affected by this change: Enterprise BI Views

Version 2021 R08 Fixes

This section lists the bug fixes made to MoversSuite.

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

Administration

Setup areas now all list in correct order
Prior to this release, some setup areas did not list in alphanumeric order within each category listing in the Admin Tool, such as listing the Sakari Account Setup before the Sakari Account Branch Setup. Also, as part of this project all the Field Requirements now list in alphabetic order and GDPR Setup has been renamed General Data Protection Regulations (GDPR) Setup.
REFERENCE: MOV-4826

BI Tool

'Crew Actuals' view fixed
The 'Crew Actuals' view from the Enterprise BI Views has been fixed to no longer show duplicate entries. Previously, it was noted that the view was showing duplicate entries when someone logged in multiple times on a service.
REFERENCE: MOV-6010

'Authorization' column from SIT Information view renamed
The 'SIT Information' view from the Enterprise BI Views has been updated to rename one of its columns from "Authorization" to "SITAuthorization." Previously, this name was causing errors in BI Reporting.
REFERENCE: MOV-6196

Cash Receipts

Electronic payments made transferable to other batches
While setting up a new payment record or while processing a manual payment, the users can now move that receipt to another electronic payments batch. Previously, it was noted that after adding the "Is Electronic Payments Batch" flag on the New Cash Receipt Batch screen and Create New Batch screen, the users were being prevented from moving a cash receipt to another electronic payments batch.
REFERENCE: MOV-6173

MoversSuite correctly imports state names from Microsoft Dynamics GP
Cash Receipts now import correctly in the cases where the state coming in from Microsoft Dynamics GP is longer than two characters. Prior to this fix, Online Payments were not being recorded as a receipt if the state on the customer record in Microsoft Dynamics GP was longer than two characters.

REFERENCE: MOV-6193

Forms Designer

To and From addresses now show on Lift Van Label bookmark
The information now displays for the To and From data when the Lift Van Labels bookmark generates. Refer to the Forms Designer topic for more information.
REFERENCE: MOV-6188

General Application

Loading progress bar now closing correctly
Improvements have been made to ensure that the loading progress bar closes correctly upon MoversSuite startup.
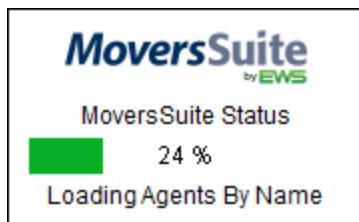
Figure 11: MoversSuite Status dialog

Some users reported that this progress bar was not auto-closing even after loading completion. Refer to MoversSuite Status for more information.
REFERENCE: MOV-6192

Local Dispatch

Renamed Crew Job Notifications
The Crew Messaging feature has been renamed to Crew Job Notifications. The screen and button available through Local Dispatch now display this new name to better indicate the true nature of this feature.
REFERENCE: MOV-6186

Roadload Integration

Support for Roadload Version 2.0.7
Script changes were needed to support Version 2.0.7 of **Roadload Integration**.
REFERENCE: MOV-6208

Suddath Integration

MoversSuite Release Update

URL for Online Help Updated
The URL for the Online Help now correctly references a specific directory instead of a file. This
allows the URL to render without 404 errors with most common browsers.
REFERENCE: MOV-6180

Efficient Workflow Solutions, LLC   **25**

Version 2021 R08 Database Changes

Schema Changes Version 2021R08

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 (2021R08)
MoversSuite Document Database Tables (2021R08)
MoversSuite Data Views (2021R08)

Version 2021 R08 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 R08 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)