



SOLUTIONS**360**
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MASTER CLASS

Release Highlights v24.01

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OCT 23, 2024

Target Audience

- Users interested in the highlights of Q360 release v24.01
- Administrators seeking to upgrade their environment to v24.01

Learning Objectives

- By the end of this session, you will be able to identify at least 5 release v24.01 highlights, including:
 - Pick and Ship Queue Enhancements
 - Subcontractor Information Tracking
 - GPS Coordinate Tracking
 - Route Site Locations with Google Maps
 - External User Invoice Payment with Credit Card
 - Summary Tab
 - Resource Console Enhancements

Agenda

1. Introduction

2. Highlights & Demo

3. Q & A

4. Wrap Up

- a) Pick and Ship Queue Enhancements
- b) Subcontractor Information Tracking
- c) GPS Coordinate Tracking
- d) Route Site Locations with Google Maps
- e) External User Invoice Payment with Credit Card
- f) Summary Tab
- g) Resource Console Enhancements

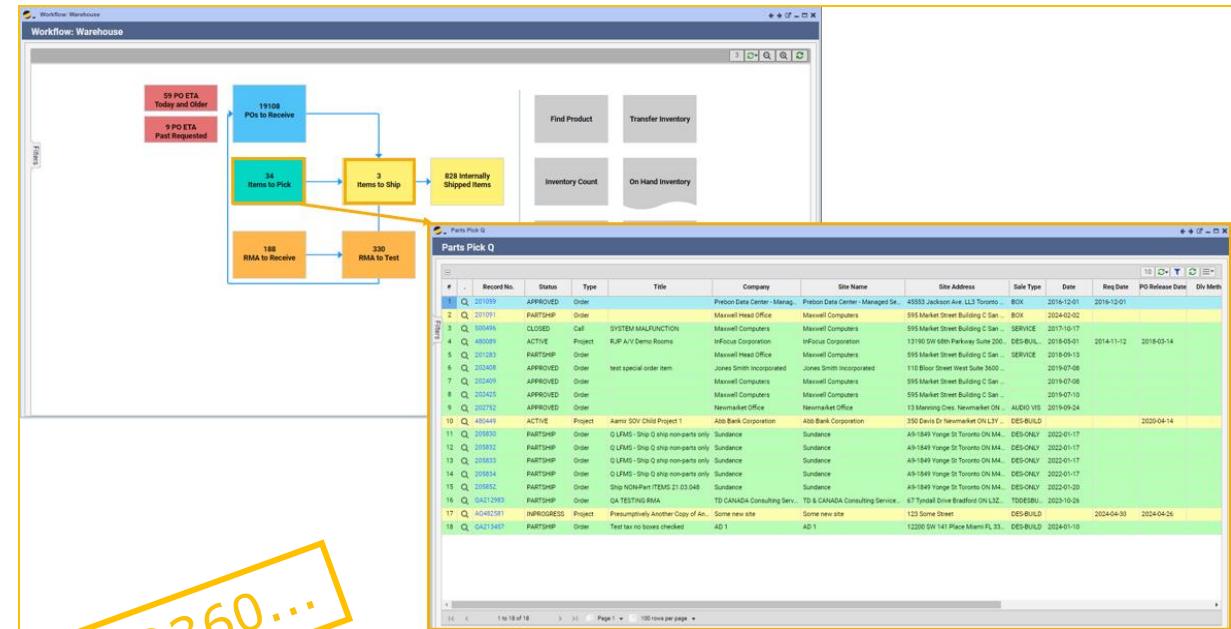
1. Introduction

- What's different about this release?
 - 24.01 is all about efficiency, visibility, and ease of use
- Why did we make changes to Pick and Ship Queue?
 - Consolidated fulfillment process means less wait time and smoother shipping
- How will the new Resource Console features help us?
 - Manage time more effectively
 - Improved visibility of Assignments, Tasks, Calls and Opportunities
 - Greater control over RC appearance

2a. Pick and Ship Queue Enhancements

Streamline your Order, Project and Call fulfillment processes for faster, more efficient shipping

- Row by job type: Order, Project, Call
- Pick / Ship multiple orders at the same time
- Reduced number of rows per queue
- Reduced clicks and drill-downs



Let's go to Q360...

2b. Subcontractor Information Tracking

Track and manage Subcontractor information with improved visibility

- Added ability to track:
 - Skills
 - Licenses
 - Insurance
 - Rates
 - Regions

Let's go to Q360....

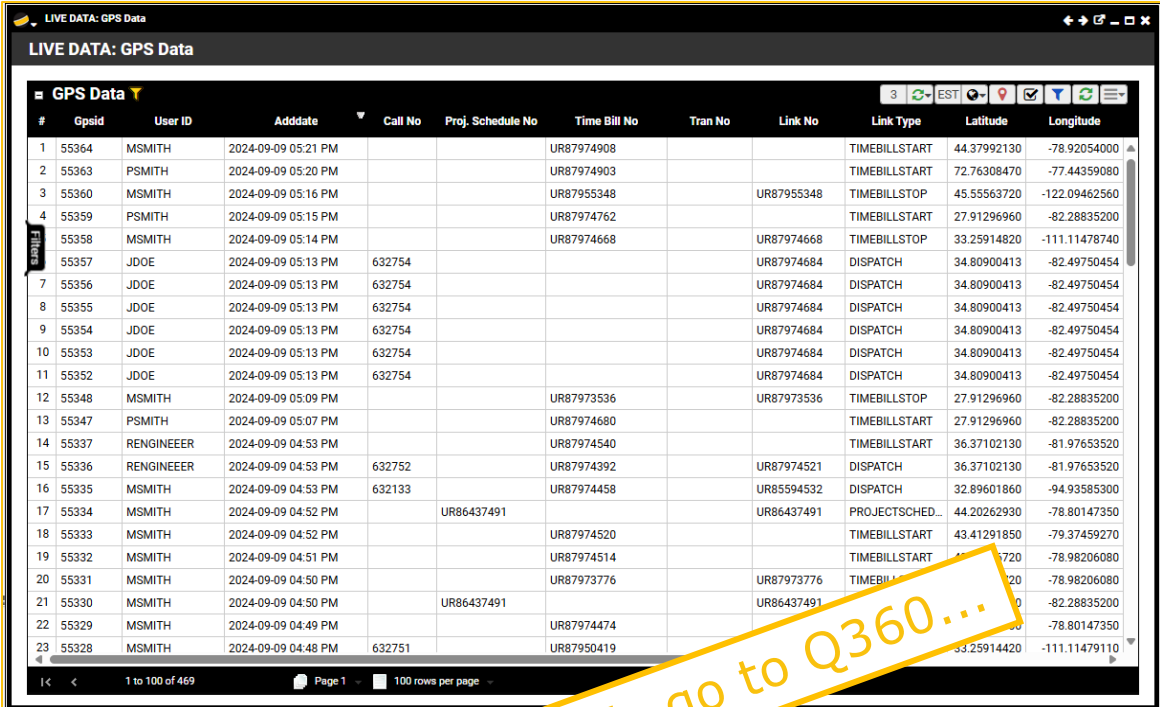
The screenshot displays the Q360 software interface for Customer #ACM001: Acme Manufacturing. The interface includes a top navigation bar with various tabs like Cust/Vend, Locations, Contacts, etc. The main content area is divided into several sections. On the left, there's a 'Company' section with fields for Address 1, Address 2, City, State, Zip, Country, Phone, Alternate Phone, Fax, and Web Site. In the center, there's a 'Contact' section with fields for Invoice Site No, NickName, Alt. Name, External User Form Type, and Comment. On the right, there's a 'Sales Rep' section with fields for Sales Rep, Alt Sales Rep, Cust Type, Market, and Source. Below these, there's a 'Customer No.' section with fields for Customer No., Status, Type, Company No., Branch, Sic, Tracking No., and Language. At the bottom right, there's a 'Subcontractor Flag' section with a checkbox and two rating fields: 'Install Rating' and 'Service Rating', both set to 0.00. Below the main content area, there's a 'Skills' section with a table of subcontractor skills.

#	SubWorkTypeNo	Description	Comment	Status	Start Date	End Date	Category	Sub Category
1	48935971	Network Design	Test	ACTIVE	2024-08-22	2024-08-23	NETWORK	
2	48953352	Electrician - Journeyman	FLorida lice	ACTIVE	2024-10-08	2024-10-07	GENERAL	
3	49144495	Audio-Visual Technician II		ACTIVE			GENERAL	

2c. GPS Coordinate Tracking

Record and track precise GPS coordinates for accurate location data

- Coordinate tracking upon
 - Starting, stopping or resuming a time bill
 - Saving a Call
 - Saving a Call Event
 - Saving a Task
 - Saving an Activity
- Viewable GPS Data
 - New data source
 - Live Data View (LDView_GPS)



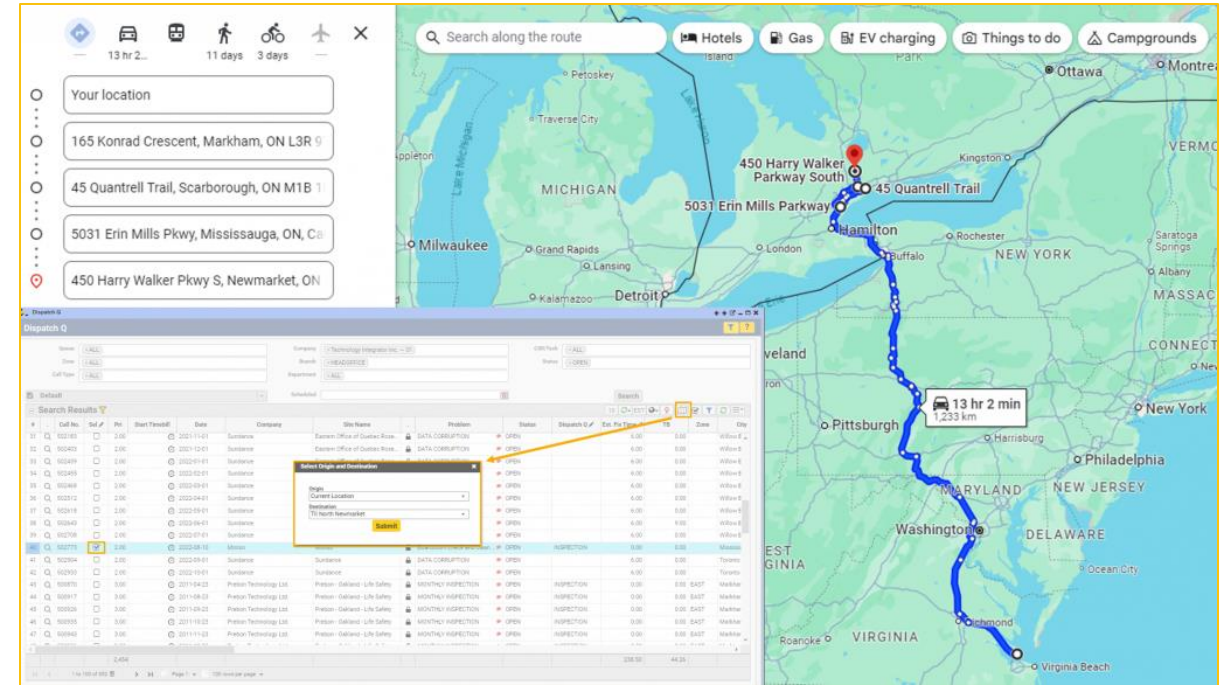
#	Gpsid	User ID	Adddate	Call No	Proj. Schedule No	Time Bill No	Tran No	Link No	Link Type	Latitude	Longitude
1	55364	MSMITH	2024-09-09 05:21 PM			UR87974908			TIMEBILLSTART	44.37992130	-78.92054000
2	55363	PSMITH	2024-09-09 05:20 PM			UR87974903			TIMEBILLSTART	72.76308470	-77.44359080
3	55360	MSMITH	2024-09-09 05:16 PM			UR87955348		UR87955348	TIMEBILLSTOP	45.55563720	-122.09462560
4	55359	PSMITH	2024-09-09 05:15 PM			UR87974762			TIMEBILLSTART	27.91296960	-82.28835200
5	55358	MSMITH	2024-09-09 05:14 PM			UR87974668		UR87974668	TIMEBILLSTOP	33.25914820	-111.11478740
6	55357	JDOE	2024-09-09 05:13 PM	632754				UR87974684	DISPATCH	34.80900413	-82.49750454
7	55356	JDOE	2024-09-09 05:13 PM	632754				UR87974684	DISPATCH	34.80900413	-82.49750454
8	55355	JDOE	2024-09-09 05:13 PM	632754				UR87974684	DISPATCH	34.80900413	-82.49750454
9	55354	JDOE	2024-09-09 05:13 PM	632754				UR87974684	DISPATCH	34.80900413	-82.49750454
10	55353	JDOE	2024-09-09 05:13 PM	632754				UR87974684	DISPATCH	34.80900413	-82.49750454
11	55352	JDOE	2024-09-09 05:13 PM	632754				UR87974684	DISPATCH	34.80900413	-82.49750454
12	55348	MSMITH	2024-09-09 05:09 PM			UR87973536		UR87973536	TIMEBILLSTOP	27.91296960	-82.28835200
13	55347	PSMITH	2024-09-09 05:07 PM			UR87974680			TIMEBILLSTART	27.91296960	-82.28835200
14	55337	RENGINEER	2024-09-09 04:53 PM			UR87974540			TIMEBILLSTART	36.37102130	-81.97653520
15	55336	RENGINEER	2024-09-09 04:53 PM	632752		UR87974392		UR87974521	DISPATCH	36.37102130	-81.97653520
16	55335	MSMITH	2024-09-09 04:53 PM	632133		UR87974458		UR85594532	DISPATCH	32.89601860	-94.93585300
17	55334	MSMITH	2024-09-09 04:52 PM		UR86437491			UR86437491	PROJECTSCHED...	44.20262930	-78.80147350
18	55333	MSMITH	2024-09-09 04:52 PM			UR87974520			TIMEBILLSTART	43.41291850	-79.37459270
19	55332	MSMITH	2024-09-09 04:51 PM			UR87974514			TIMEBILLSTART	43.41291850	-79.37459270
20	55331	MSMITH	2024-09-09 04:50 PM			UR87973776		UR87973776	TIMEBILLSTART	43.41291850	-79.37459270
21	55330	MSMITH	2024-09-09 04:50 PM		UR86437491			UR86437491	TIMEBILLSTART	43.41291850	-79.37459270
22	55329	MSMITH	2024-09-09 04:49 PM			UR87974474			TIMEBILLSTART	43.41291850	-79.37459270
23	55328	MSMITH	2024-09-09 04:48 PM	632751		UR87950419			TIMEBILLSTART	33.25914420	-111.11479110

2d. Route Site Locations with Google Maps

Seamlessly integrate Google Maps to optimize route planning

- Route button added to various forms including
 - My Tasks
 - Dispatch Queue
- Redirect user to Google Maps

Let's go to Q360...



2e. External User Invoice Payment via Credit Card

Enable External Users to pay invoices quickly using credit cards

- External Users with Invoice permission may view Billing tab and Invoices - select to pay
- Input new credit cards / save cards for future use
- Requires configured Credit Card API – Authorize.net or Forte

Date	Due Date	Age (From Due Date)	Amount	Balance	Bill To	Ship To	Call
-24	2024-10-24	0 to 30 days	US\$20,000.00	US\$20,000.00	ARV PRE HOUSTON	ARV PRE HOUSTON	
-28	2024-09-27	0 to 30 days	US\$49,562.71	US\$49,562.71	Prebon East LA - Health Care 3225...	Some new site 123 Some Street	
-23	2024-08-02				Prebon Technology Ltd. 9600 SW ...		
-23	2024-08-02				Prebon Technology Ltd. 9600 SW ...		
-02	2024-08-01				on Etobicoke - Telecomm 180...		
-25	2024-07-25				Some new site 123 Some Street		
-24	2024-07-24				Prebon Technology Ltd. 9600 SW ...		
-24	2024-07-24				Prebon Technology Ltd. 9600 SW ...		
-24	2024-07-24				Prebon Technology Ltd. 9600 SW ...		
-24	2024-07-24				Prebon Technology Ltd. 9600 SW ...		
-07	2024-07-07				Prebon Technology Ltd. 8500 Sw ...		
-04	2024-07-04				Prebon Technology Ltd. 12021 84th W...		
-28	2023-12-28				Prebon Technology Ltd. 8500 Sw ...		
-21	2023-12-21				Some new site 123 Some Street		
-10	2023-12-10				ute 1234 oshawa		
-23	2023-11-22				on Boise - A/V 2104 Eastman ...	503169	
-06	2023-11-05				Prebon Technology Ltd. 9600 SW ...		
-06	2023-11-05	> 90 days	US\$310.79	US\$310.79	Prebon East LA - Health Care 3225...	Prebon Technology Ltd. 9600 SW ...	
-14	2023-10-14	> 90 days	US\$139.91	US\$139.91	Prebon Technology Ltd. 9600 SW ...	Some new site 123 Some Street	
-13	2023-10-13	> 90 days	US\$694.20	US\$694.20	Prebon East LA - Health Care 3225...	Some new site 123 Some Street	
-02	2023-09-01	> 90 days	US\$575.00	US\$575.00	Prebon Technology Ltd. 9600 SW ...	Some new site 123 Some Street	

Invoice Payments

Credit Card

****5100 — MC — External Test User

Add Credit Card

Card Type

Name on Card

Card Number

Expiry Month

Expiry Year

CVV

Save Credit Card

Submit

Payment Total

US\$760.79

Submit

Let's go to Q360...

2f. Summary Tab

Consolidated view for easy access to important data and insights

- Added to 6 Forms:
 - Projects
 - Quotes
 - Orders
 - Opportunities
 - Tasks
 - Calls

Acme Construction Inc - Project: 481200 - 1 - Complex Integration Project Template with No Efforts

TITLE Active Only

Project Detail Team / Events Tasks Assignments / Time Bill Orders / Invoices POs / Vouchers Products Sales Opps Profit Expenses Resources SOW Documents Email History **Summary**

#

2 EMAIL - qaservice@solutions360.com
2022-01-13 04:58 PM
QA Service Team Email Queue Signature Project: 481200 - 1 - Complex Integration Project Template with No Efforts Customer: Acme Construction Inc Project Leader: Start Date: 2021-10-27 End Date: 2022-08-05 Install Date:

3 EMAIL - [REDACTED]
2022-01-13 04:58 PM
Email sent to: [REDACTED] Subject: Project No. 481200 - 1 - Complex Integration Project Template with No Efforts QATN:12571963
QA Service Team
Email Queue Signature
Project: 481200 - 1 - Complex Integration Project Template with No Efforts
Customer: Acme Construction Inc
Project Leader:
Start Date: 2021-10-27
End Date: 2022-08-05
Install Date:

4 EVENT - [REDACTED]
2021-12-21 04:50 PM

1 to 4 of 4 Page 1 100 rows per page

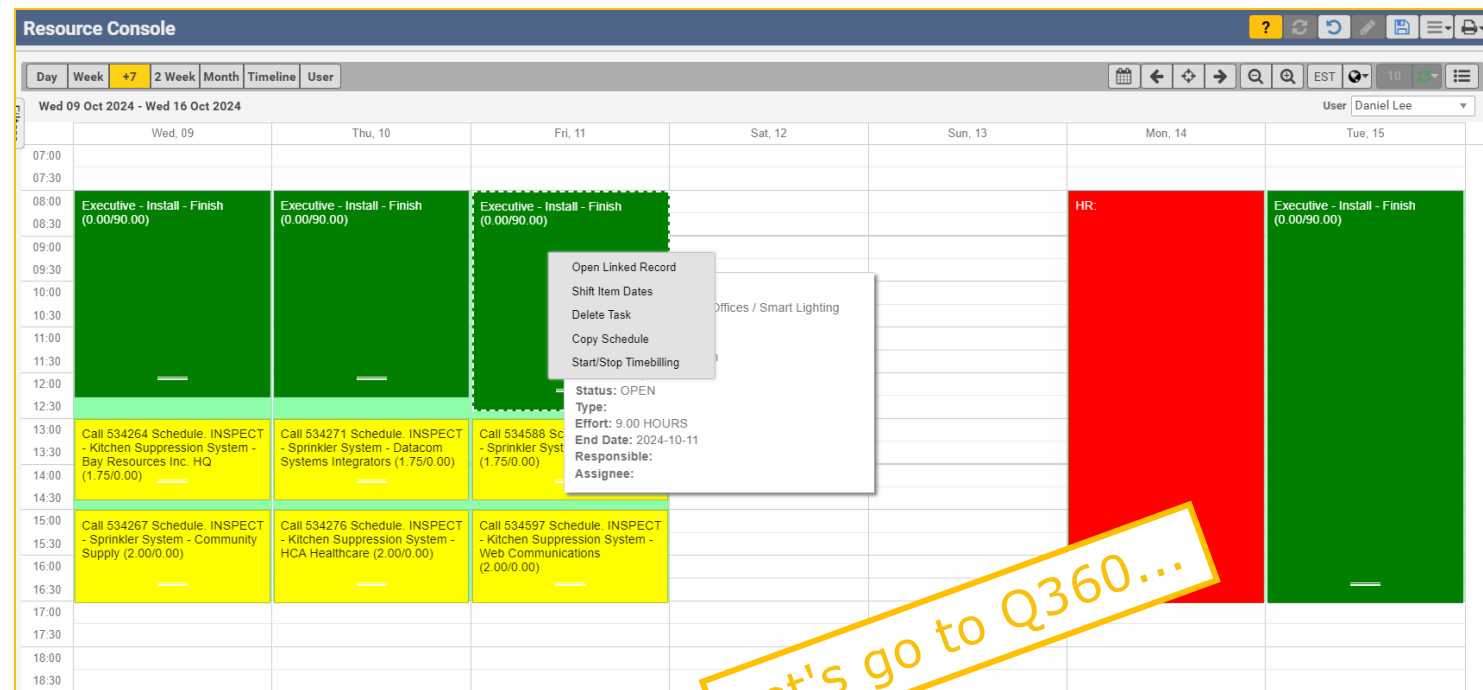
QA Service Team
Email Queue Signature
Project: 481200 - 1 - Complex Integration Project Template
Customer: Acme Construction Inc
Project Leader:
Start Date: 2021-10-27
End Date: 2022-08-05
Install Date:

Let's go to Q360...

2g. Resource Console Enhancements

Enhanced functionality and interface for managing resources more efficiently

- 7-day view
- Copy Schedule
- Start / Stop Time Bill
- Open Assignment, Task, Call, or Opportunity
- Multi-Select synced Calendar item to create RC Schedule
- Set default 'Pop Up' and 'Hide From Calendar' flags



Poll

Did you know that you or your company's Q360 Administrator have the ability to view and vote on potential new Q360 features in our customer portal?

- a) Yes
- b) No

3. Q&A



4. Wrap Up & References...

- By the end of this session, you will be able to identify at least 5 release v24.01 highlights, including:
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4. Wrap Up & References

Q360 > Help > Contents

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PROCEDURES KNOWLEDGE BASE VIDEOS RELEASE NOTES

WAREHOUSE

Q360

Window Help

Send Email to Customer Care

Contents

Subcontractor Information Tracking

Route Site Locations with Google Maps – coming in v24.01

External User Invoice Payments via Credit Card – coming in v24.01

Pick Items

Pick Items (v24.01) – coming soon

Pick Items (24.01) – coming soon

Path: (Workflow > Warehouse > Pick Items)

Parts Pick Q Filters tab

- Parts flag = A or Q Type items
- Non Parts flag = Non A or Q Type items
- Linked = records linked to a Project
- Not Linked = records not linked to a Project
- No Parts = records with no Q Type
- Pick Only = items available to be picked
- Unreceived PO Only = records with no PO
- Record Type: select from Project or Order

Parts Pick Q grid colors

- Green = available to be picked

Ship Items

Ship Items (v24.01) – coming soon

Ship Items (v24.01) – coming soon

1. Workflow menu > Warehouse > Items to Ship bucket

- Drill into item (Order, Call, Project or PO) to ship in the Shipping Queue
- Highlight items to be shipped
- Set Delivery/Return information (defaults from Header tab of order)
- Set Courier / Waybill information if applicable
- Add freight cost if applicable by clicking "Add Freight" button
- Click Ship button
- Confirm in pop-up window
- Print packing slip or not from pop-up window

2. Inventory menu > Work Queues > Ship Queue

- Drill into item (Order, Call, Project or PO) to ship in the Shipping Queue
- Highlight items to be shipped
- Set Delivery/Return information (defaults from Header tab of order)

See what's new in Q360 version 24.01

Enhancements to Picking and Shipping Queues and Resource Console

New features Subcontractor tab and Admin, GPS Coordinate Record, External User Invoice Payments, Google Map Routing and Summary tab

See complete list of fixes and features here - v24.01 Release Notes, and Advisories for summary and important notices.

Pick and Ship Queue Enhancements

Easier to use Inventory workflows and queues

Find Projects, Calls and Orders to be picked / shipped all in one place

Pick and ship multiple orders simultaneously

Print packing slips / shipping labels for single or multiple orders

Subcontractor Information Tracking

Record and review Subcontractor information as part of the subcontract decision-making process

Easily access Subcontractor subtab from the Customer form

Record / review important Subcontractor attributes including skills, licenses, insurance and rates

Customize selectable Subcontractor attributes via the Subcontractor Admin form

User Invoice Payments

Select permissions, External Users may pay invoices on the Customer Portal using a credit card. This information assumes credit processing integration is already set up in Q360.

Permissions: INVOICE (view), CREDITCARD (view, create, exec)

For credit card payment:

Left-hand toolbar, select Billing, and then Outstanding. The Invoices > Unpaid grid will open

Click the Sel (Select) column, check the invoice(s) you wish to pay

Click the Pay Selected button. The Invoice Payments window will open

Click the Credit Card drop down menu, you may select a credit card to use for payment

Note: External Users will only see credit cards that they have added

Click the Submit button

Confirm your action on the Confirmation window that appears

For credit card to use for payment:

Follow steps 1-3 above

Click the ADD (+) button in the Invoice Payments window. The Add Credit Card window will open

Complete the required fields and click Submit

Note: External Users may set the Save Credit Card flag in this window to save the credit card to the Customer profile for future use

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2024-10-23

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Release Highlights v24.01



V24.01 is in Limited Release!

Interested in scheduling your upgrade?
Contact us at:

support@solutions360.com

www.solutions360.com



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