SOLUTIONS360
business.managed

MASTER CLASS

Release Highlights v24.01

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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

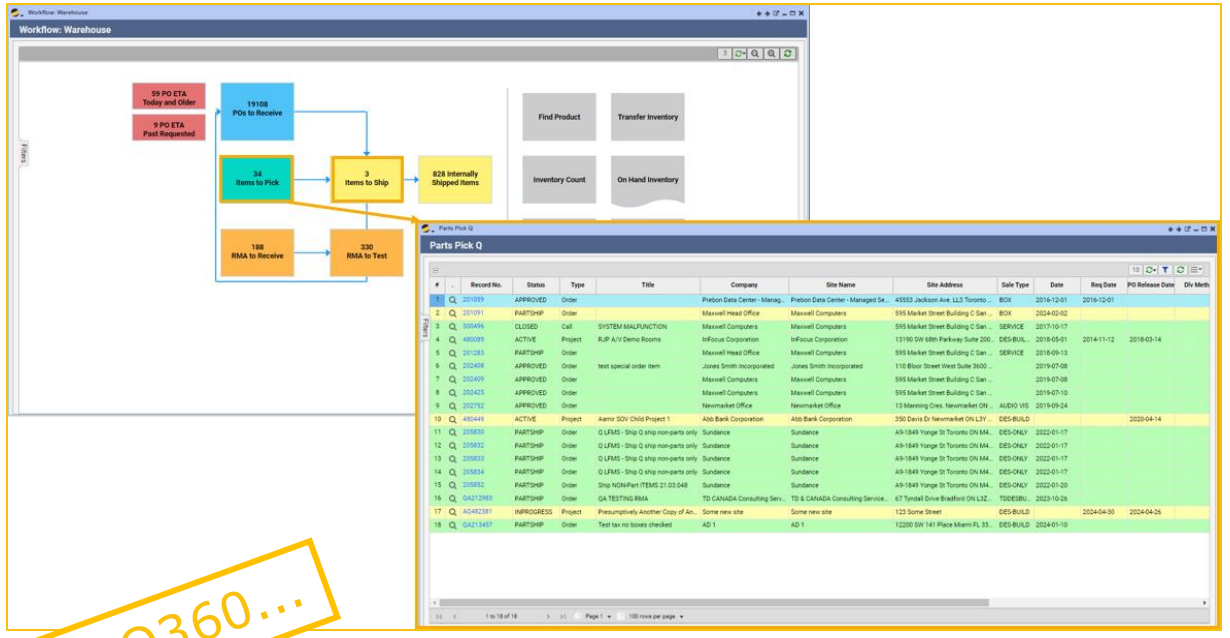
1. Introduction

- 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



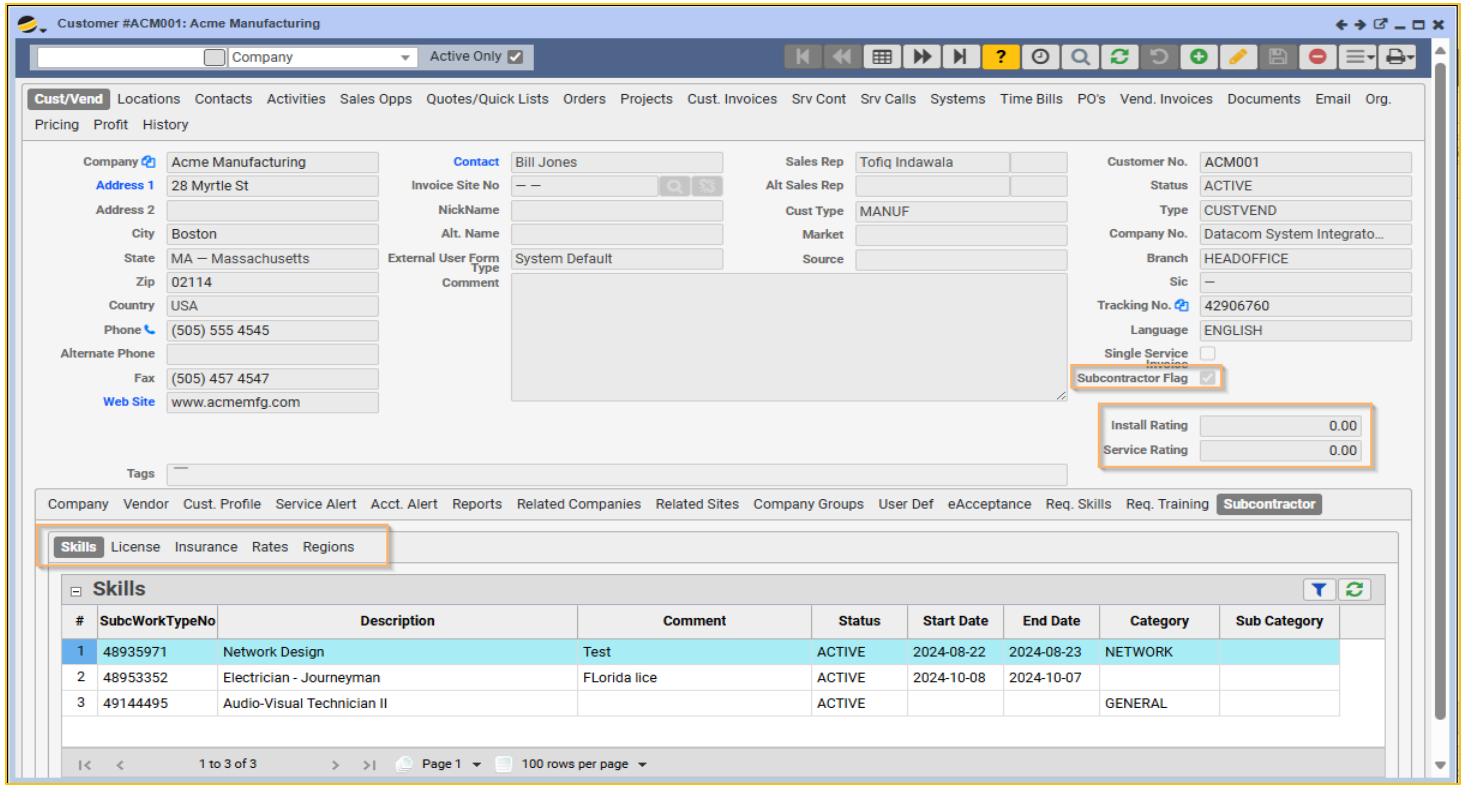
Let's go to Q360...

2b. Subcontractor Information Tracking

Track and manage Subcontractor information with improved visibility

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

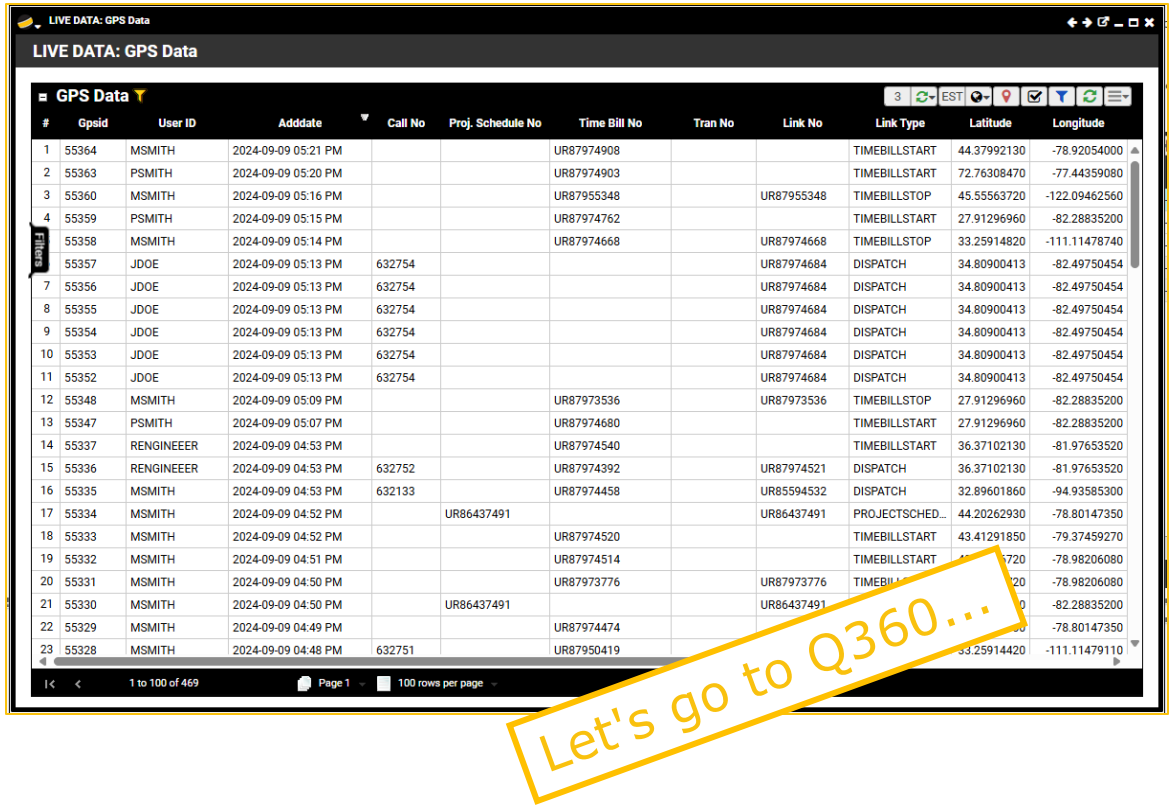
Let's go to Q360...



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)

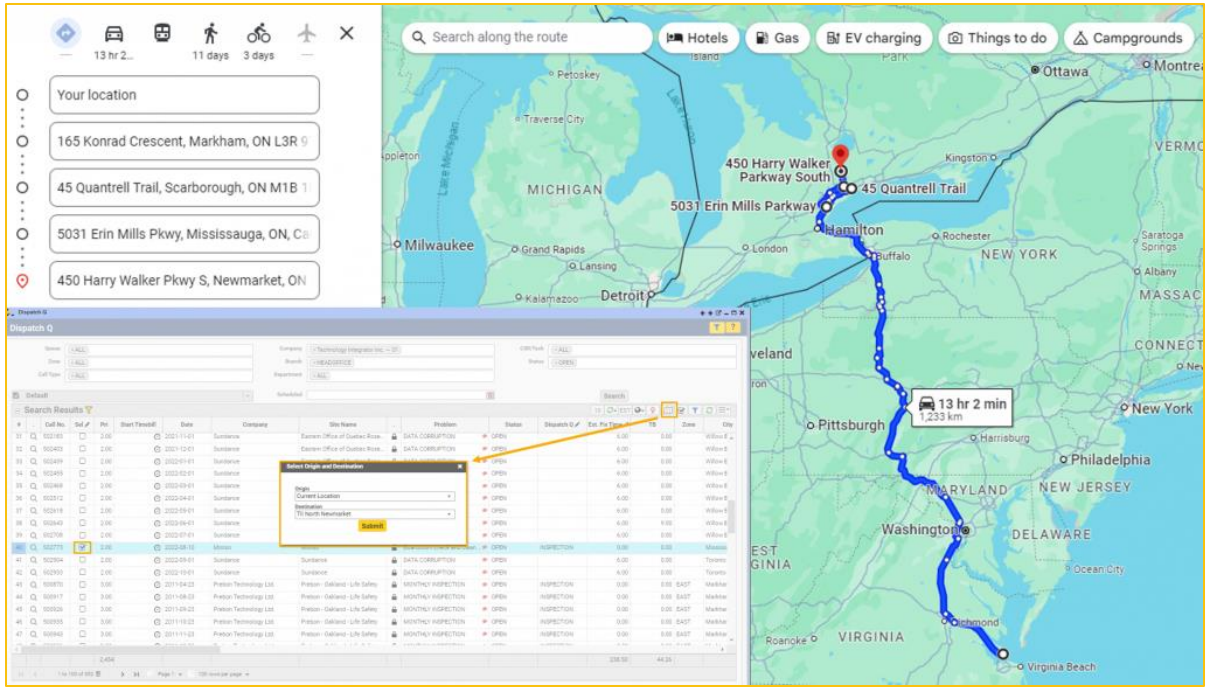


#	Gpsid	User ID	Adddate	Call No	Proj. Schedule No	Time Bill No	Tran No	Link No	Link Type	Latitude	Longitude
1	55364	MSMITH	2024-09-09 05:21 PM			UR87974908			TIMEBILLSTART	44.37992130	-78.92054000
2	55363	PSMITH	2024-09-09 05:20 PM			UR87974903			TIMEBILLSTART	72.76308470	-77.44359080
3	55360	MSMITH	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	RENGINEEER	2024-09-09 04:53 PM			UR87974540			TIMEBILLSTART	36.37102130	-81.97653520
15	55336	RENGINEEER	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		-78.98206080
20	55331	MSMITH	2024-09-09 04:50 PM			UR87973776		UR87973776	TIMEBI...		-78.98206080
21	55330	MSMITH	2024-09-09 04:50 PM		UR86437491			UR86437491			-82.28835200
22	55329	MSMITH	2024-09-09 04:49 PM			UR87974474					-78.80147350
23	55328	MSMITH	2024-09-09 04:48 PM	632751		UR87950419				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



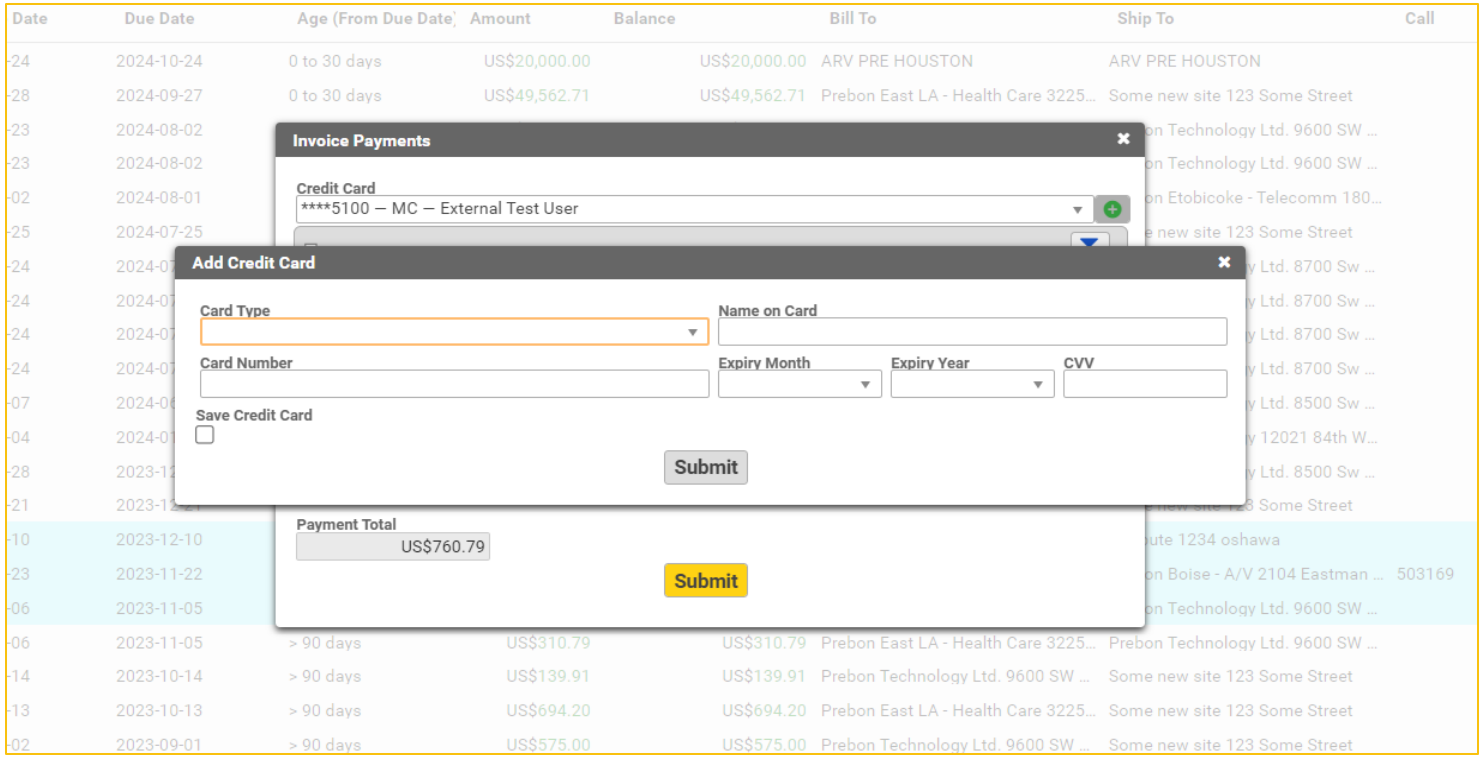
Let's go to Q360...

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

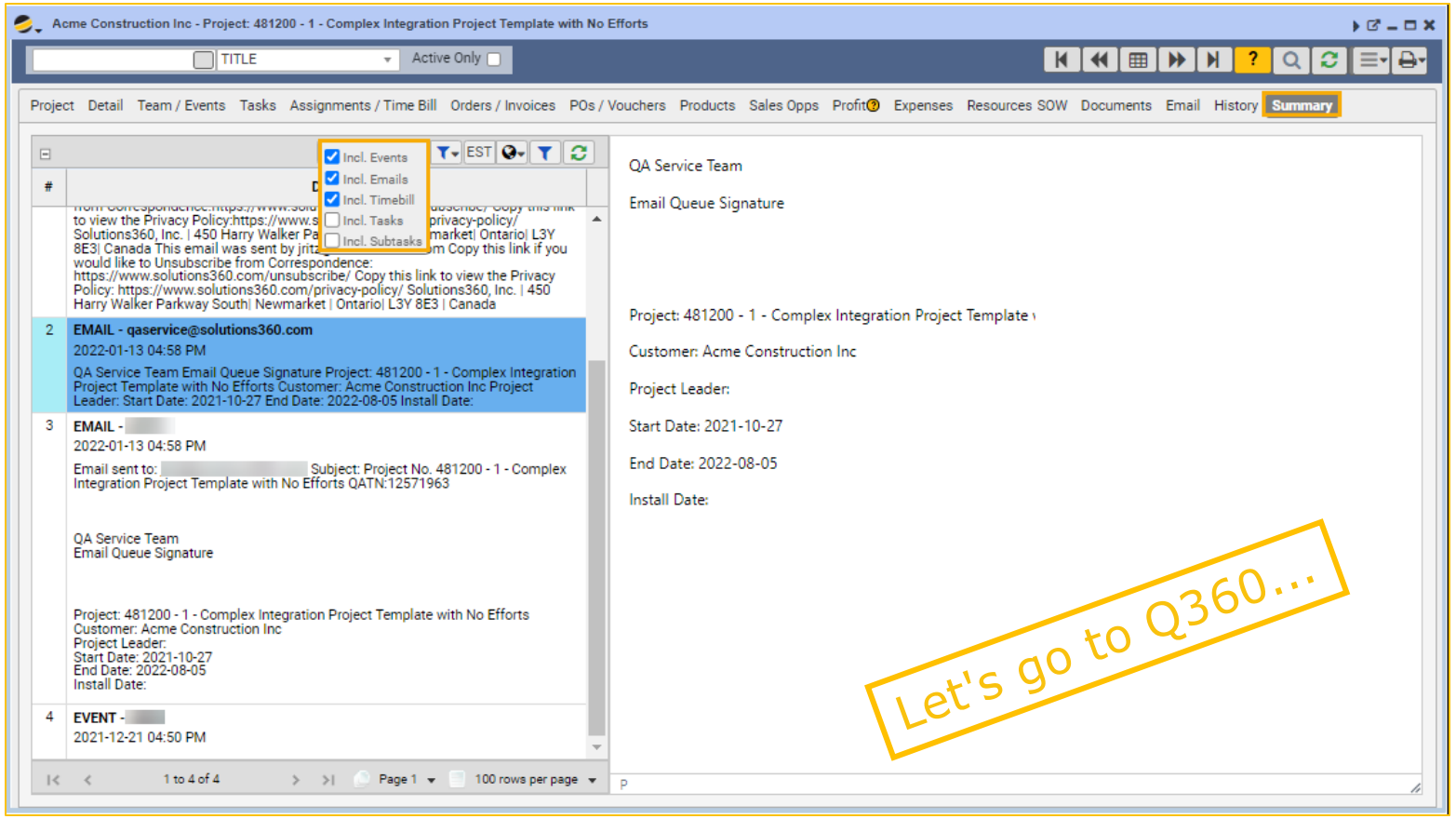
Let's go to Q360...



2f. Summary Tab

Consolidated view for easy access to important data and insights

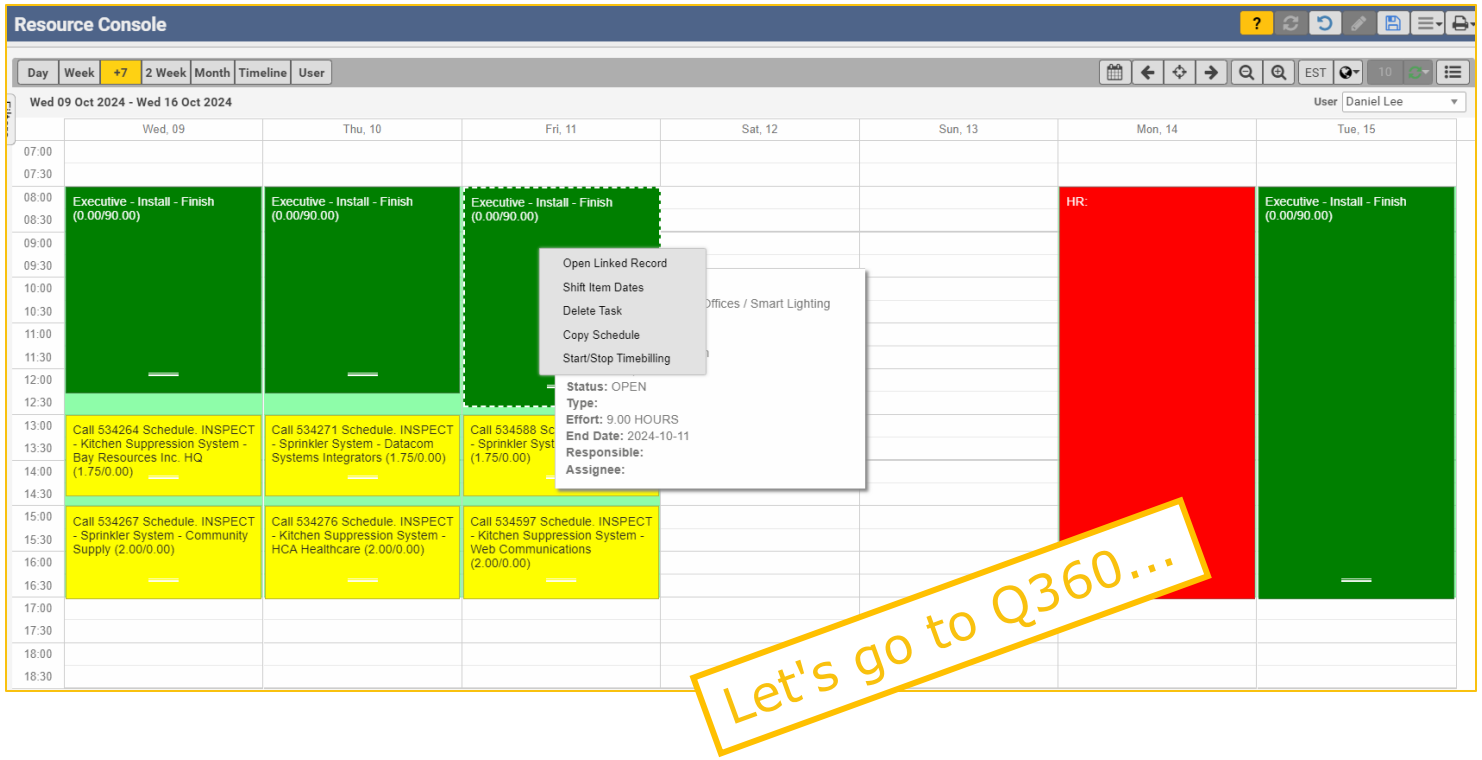
- Added to 6 Forms:
  - Projects
  - Quotes
  - Orders
  - Opportunities
  - Tasks
  - Calls



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:
  - Pick and Ship Queue Enhancements
  - Subcontractor Information Tracking
  - GPS Coordinate Tracking
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  - Summary Tab
  - Resource Console Enhancements

4. Wrap Up & References

Q360 > Help > Contents

Pick Items

Pick Items (v24.01) – coming so

Pick Items (24.01) – comi

Path: (Workflow > Warehouse > I

Parts Pick Q Filters tab

- Parts flag = A or Q Type items
- Non Parts flag = Non A or Q Ty
- Linked = records linked to a P
- Not Linked = records not linke
- No Parts = records with no Q
- Pick Only = items available to
- Unreceived PO Only = records
- Record Type: select from Proje

Parts Pick Q grid colors

- Green = available to be picked

Ship Items

Ship Items (v24.01) – coming soon

5:30

Ship Items (v24.01) – coming soon

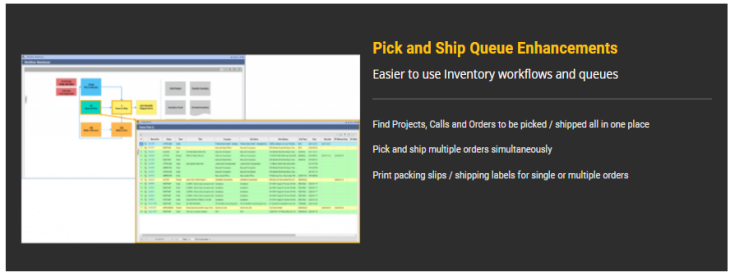
1. Workflow menu > Warehouse > Items to Ship bucket
   a. Drill into item (Order, Call, Project or PO) to ship in the Shipping Q g
   b. Highlight items to be shipped
   c. Set Delivery/Return information (defaults from Header tab of order)
   d. Set Courier / Waybill information if applicable
   e. Add freight cost if applicable by clicking "Add Freight" button
   f. Click Ship button
   g. Confirm in pop-up window
   h. Print packing slip or not from pop-up window
2. Inventory menu > Work Queues > Ship Q
   a. Drill into item (Order, Call, Project or PO) to ship in the Shipping Q g
   b. Highlight items to be shipped
   c. Set Delivery/Return information (defaults from Header tab of order)

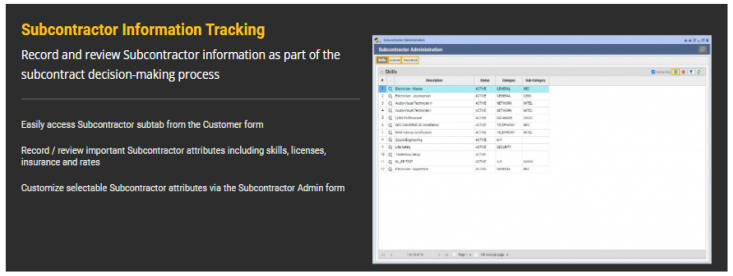
See what's new in Q360 version 24.01

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.





Subcontractor Information Tracking

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

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

ser Invoice Payments

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

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

r credit card payment:

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

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

e Pay Selected button. The Invoice Payments window will open

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

e: External Users will only see credits cards that they have added

bmit

your action on the Confirmation window that appears

card to use for payment:

te steps 1-3 above

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

te the required fields and click Submit

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

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V24.01 is in Limited Release!

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