

SOLUTIONS**360**
business.managed

MASTER CLASS



V25 Release Highlights

Presenters: Roman Burchart, Andrew Ashbury
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Target Audience

- Users interested in Q360 v25

Learning Objectives

By the end of this session, you will be able to:

- Understand how v25 delivers a cleaner, faster, and more intuitive user experience
- Discover how architectural improvements in v25 enhance productivity and support future innovation
- Recognize how v25 lays the foundation for current and future AI capabilities in Q360

Agenda

1. Introduction

2. UI / UX

- a) Navigation, Menus
- b) User Menu, Preferences
- c) LDRs, Grids, Grid Preferences
- d) Dashboards

3. AI

- a) Ask Q
- b) AI Assistance in Q360

4. Advanced Features

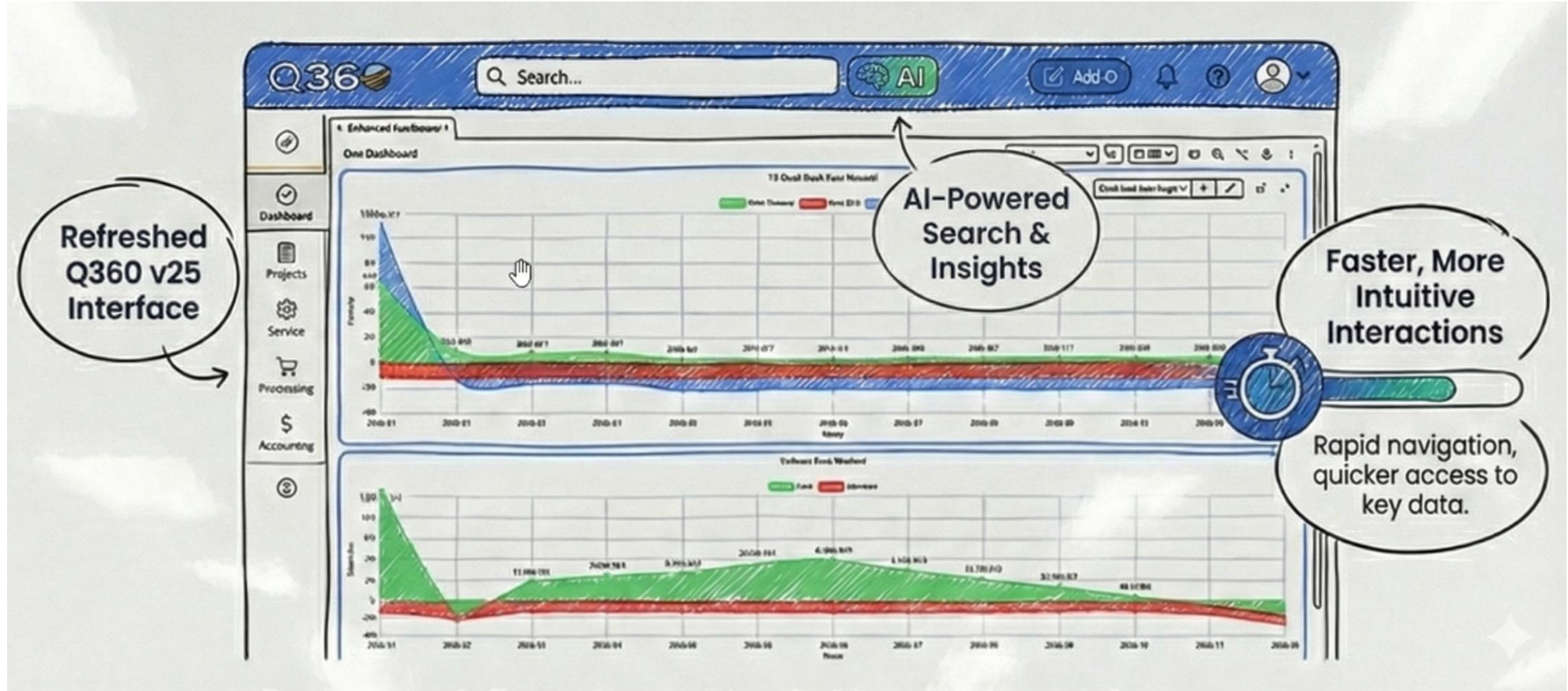
- a) Multi-sheet Export
- b) Merge PDF
- c) Quote Labor Enhancements

5. Summary

6. Q&A



1. Introduction



2. UI / UX

- Navigation, Menus
- User Menu, Preferences
- LDRs
- Grids, Grid Preferences
- Dashboards

Customer: 1505873 - BC X

Search By ... Company

Customer/Vendor Sites Contacts Activities Sales Opps

Orders

Q	Order No.	Date	Con. Type	Sale Type					
Q	227711	10/07/2025	WORKORDER	SERVICE					
Q	227687	09/04/2025	WORKORDER	SERVICE					
Q	227686	09/04/2025	WORKORDER	SERVICE					
Q	227681	09/02/2025	WORKORDER	SERVICE					
Q	227668	08/25/2025	RMA						
Q	227667	08/25/2025	RMA						
Q	224188	12/15/2024	SALE	BOX	Equipment Sale	APPROVED	01	BC Children's Hospital	
Q	223229	10/21/2024	SALE	DES-ONLY	Room 101 / Projector Network Setup	APPROVED	01	BC Children's Hospital	
Q	224089	10/15/2024	SALE	BOX	Equipment Sale	PARTSHIP	01	BC Children's Hospital	

User Preferences

General | Toolbar | Authenticator | Grids | Editor | Anchors | Calendar

View Sizing: Normal

Date Format: MM/dd/yyyy (USA)

24 Hour Time Format: ☒

Home Page: System Default

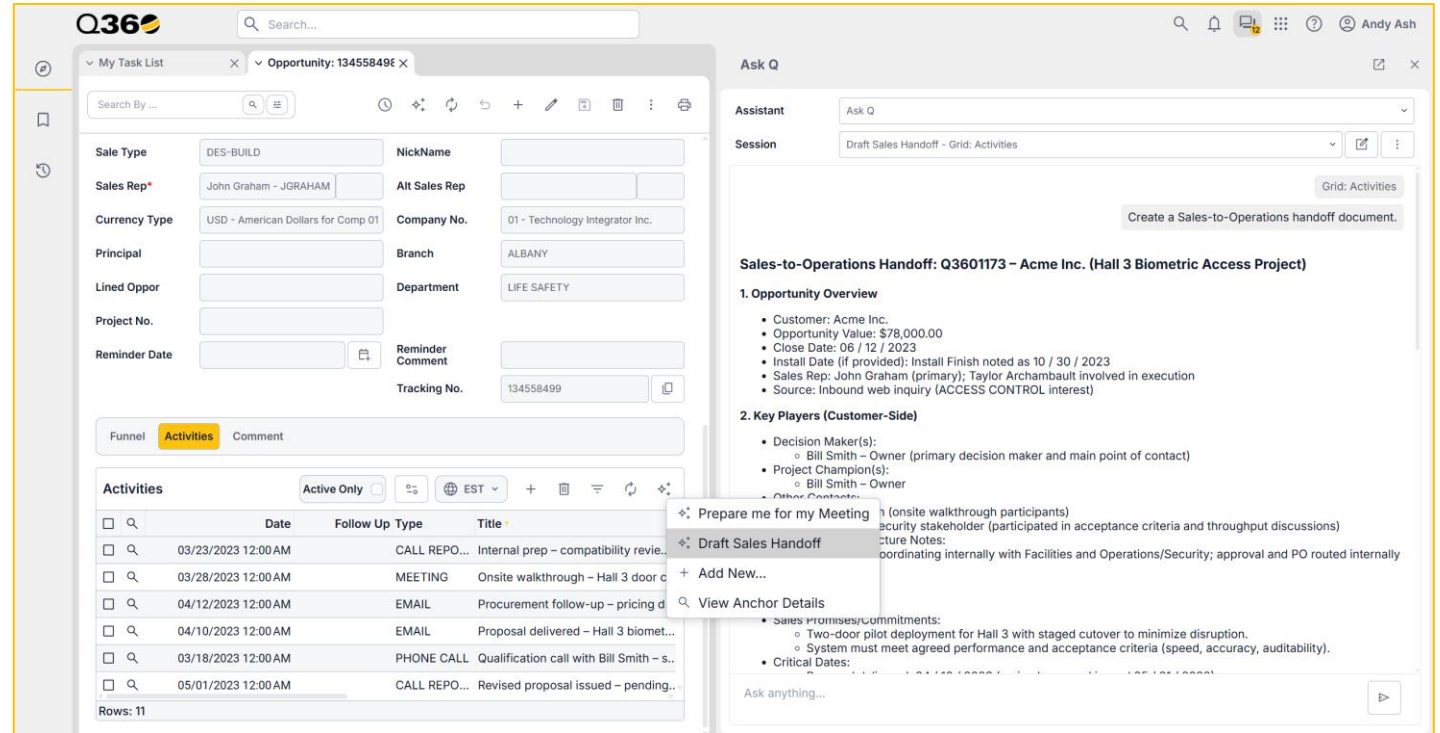
Mobile Home: System Default

Time Zone: EST - Eastern Time

Q360

- File
- View
- Maintenance
- Sales
- Accounting
- Projects
- Service
- Inventory
- HR
- Live Data
- Workflow

- Q360 Help
- Ask Q AI Panel



3. AI – AI Assistance in Q360

- Custom created articles
- Anchor almost anywhere for use with Ask Q AI

The screenshot displays the Q360 AI Assistant interface. On the left is a sidebar with a search bar and a list of categories: File, View, Maintenance, Sales, Accounting, Projects, Service, Inventory, HR, Live Data, Workflow, and Dashboards. The main area shows a form for creating or editing an article. The title is 'Draft Sales Handoff' and the article number is '152519595'. The category is 'SALES' and the subcategory is 'Subcat'. The 'Active' checkbox is checked, and the 'Type' is 'ASKQ'. The 'AI Assistant' field is set to 'Ask Q'. Below the form, there are two tabs: 'Content' and 'Anchors'. The 'Content' tab is active, showing a 'Context' section with a role description, purpose, and context, and a 'Default Prompt' section with a prompt to create a Sales-to-Operations handoff document.

Q360 Search... Andy Ash

My Task List x Opportunity: 134558498 x Article: Draft Sales Handoff x

Search By ... Title Active Only

Title* Draft Sales Handoff Article No. 152519595

Category SALES Subcat

Active ☒

Type* ASKQ

AI Assistant Ask Q

Content Anchors

Context

Q3601173 - Draft Sales Handoff

ROLE

You are AskQ, a helpful AI that assists sales reps in preparing structured handoff documentation for the Operations team when a sales opportunity is transitioning into project pre-build.

PURPOSE

Analyze sales opportunity history, activities, notes, and communications to create a comprehensive Sales-to-Operations handoff document that ensures Operations is fully prepared to deliver smoothly.

CONTEXT

You will receive information about sales opportunities and related activities, including historical notes, communications, and deal details.

Your responsibilities:

Default Prompt

Create a Sales-to-Operations handoff document.

4. Advanced Features

- Multi-Sheet Export
- Merge PDF
- Quote Labor Enhancements

The screenshot displays the software interface with the 'Line Items' table at the top, showing columns for Margin %, GP, Ext Price, Ext Cost, Labor Qty, Labor Price, Labor Cost, Ext Labor Qty, and Ext Labor Price. Below this is the 'Labor Details' table, which includes columns for Master No., Labor Desc, Unit Qty, Ext Qty, Unit Price, Unit Cost, Ext Price, and Ext Cost. The 'Print Report' dialog is open, showing the 'Report Options' section with various settings. The 'Export Data...' menu is open, showing options like 'To CSV', 'To Excel', 'To MultiSheet Excel', and 'To HTML'. The 'Merge PDFs' button is highlighted in the 'Print Report' dialog.

Line Items Table:

Margin %	GP	Ext Price	Ext Cost	Labor Qty	Labor Price	Labor Cost	Ext Labor Qty	Ext Labor Price
21.61%	\$1,335.88	\$6,179.38	\$4,843.50	25.0000	\$3,341.25	\$2,475.00	25.0000	\$3,341.25
26.66%	\$400.00	\$1,500.00	\$1,100.00	5.0000	\$708.75	\$525.00	10.0000	\$1,417.50
20.00%	\$625.00	\$3,125.00	\$2,500.00	3.7500	\$480.94	\$356.25	3.7500	\$480.94
20.00%	\$241.25	\$1,206.25	\$965.00	4.0000	\$509.63	\$377.50	4.0000	\$509.63

Labor Details Table:

Master No.	Labor Desc	Unit Qty	Ext Qty	Unit Price	Unit Cost	Ext Price	Ext Cost
<input type="checkbox"/> INSTALL - ROUGH	Labor - Installation - Rough	1.0000	2.0000	\$114.75	\$85.00	\$229.50	\$170.00
<input type="checkbox"/> INSTALL - FINISH	Installation - Finish	2.0000	4.0000	\$114.75	\$85.00	\$459.00	\$340.00
<input type="checkbox"/> COMMISSIONING	Labor - Commissioning	2.0000	4.0000	\$182.25	\$135.00	\$729.00	\$540.00

Print Report Dialog:

Report No. 1. Demo Detailed Proposal
2. Demo Web Proposal
3. Demo Proposal - Lease
Standard Proposal - Sections

Report Options: Save To Customer - PRE001, Save To Quote, Upload to Cloud

Line Item Grouping: Group By Room, Show Part Num, Show Labor Details: Details, Include the Frick Sections, Show Manuf act, Show Lin / Item

Lump Sum Totals Only: ☐
Show Qty: ☒
Show Totals: ☒

Destination: Screen, Download, Email, eAccept

Format: PDF

Export Data... Menu:

- Copy Value
- Freeze Company
- Configure Columns
- Open Fullscreen
- Export Data... (selected)
- Chart View
- Collapse Grid

Export Data... Sub-menu:

- To CSV
- To Excel
- To MultiSheet Excel (selected)
- To HTML

MultiSheet Excel Sub-menu:

- Add Sheet to Workbook
- Export Workbook

Select PDFs to Merge Dialog:

Merge	Title	File Name	Size in KB
<input checked="" type="checkbox"/>	N (2)		5
<input type="checkbox"/>	Sample_AV_System...	Sample_AV_System_Wir...	2
<input type="checkbox"/>	Sample_Terms_and...	Sample_Terms_and_Con...	3

Rows: 2

5. Summary



Poll #1:

Which v25 features / enhancements are you most excited about? (multi-select)

- a) Improved performance
- b) Improved Toolbar, windows vs tabs
- c) Grid enhancements
- d) AI Q360 Help
- e) Ask Q AI
- f) Other

6. Q&A





V25.01 is in limited release!

Interested in upgrading?

Contact your Q360 Admins.
These resources may reach out to your Customer Success Manager or
Customer Support

www.solutions360.com

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