MotilityAnywhere

Release Notes

Enhancements to MotilityAnywhere

v.4.5.20254.43520

January 2026

MotilityAnywhere Release Notes

v.4.5.20254.43520

Motility Software Solutions

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Business Office Enhancements

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General Program Enhancements

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Reports

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New reports

The following reports have been added in the Reports module. For more information about the report, refer to the corresponding topic.

Parts & Service

- Service Invoices Laser Alt report. For more information, refer to page 40.

Accounting

- Daily Operating reports. For more information, refer to page 47.

CRM

- Mailing Labels report. For more information, refer to page 59.
- Lead Rotation report. For more information, refer to page 60.

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Report enhancements

Enhancements have been made to the following reports. For more information about the enhancement to a report, refer to the corresponding topic.

Deal Desking

- Sales Analysis Report By Make Model report. For more information, refer to page 21.
- Finance Front Back Totals report. For more information, refer to page 22.
- Finance Deal Status report. For more information, refer to page 23.

Unit Inventory

- Various Unit Inventory reports. For more information, refer to page 27.

Parts & Service

- Service Invoice Laser report. For more information, refer to page 41.
- Items Sold report. For more information, refer to page 42.

Accounting

- Accounts Receivable Transactions report. For more information, refer to page 48.
- AP Transactions by GL Account Number report. For more information, refer to page 49 and page 50.
- Invoices Due report. For more information, refer to page 51.
- GL Detail Report Research report. For more information, refer to page 52.
- Check Reconciliation report. For more information, refer to page 53.
- Contracts Summary report. For more information, refer to page 54.

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CRM

- Prospect Information Sheet report and Prospect Listing - Simplified report. For more information, refer to page 61.

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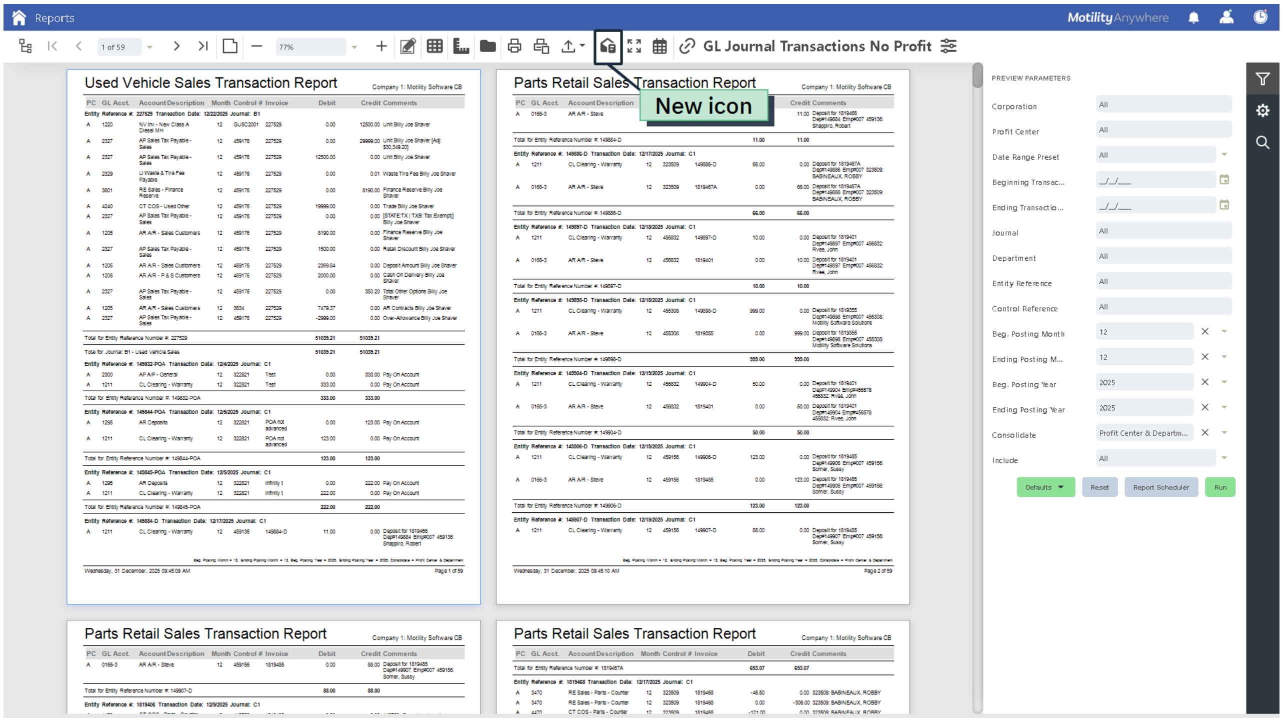
Send reports as attachments to Email messages

Using a new icon in the Reports module, you can now send reports as attachments to Internet Email messages. The new (Email report - .pdf) icon allows employees to quickly share reports both internally and externally.



After requesting the report, click the (Email report - .pdf) icon to attach the report to a new Email message. The New Message window displays, where the report is automatically attached to a new Email message as a .pdf file. Add information, such as the recipient's Email address, and then click the **Send** button to send the message, as normal.

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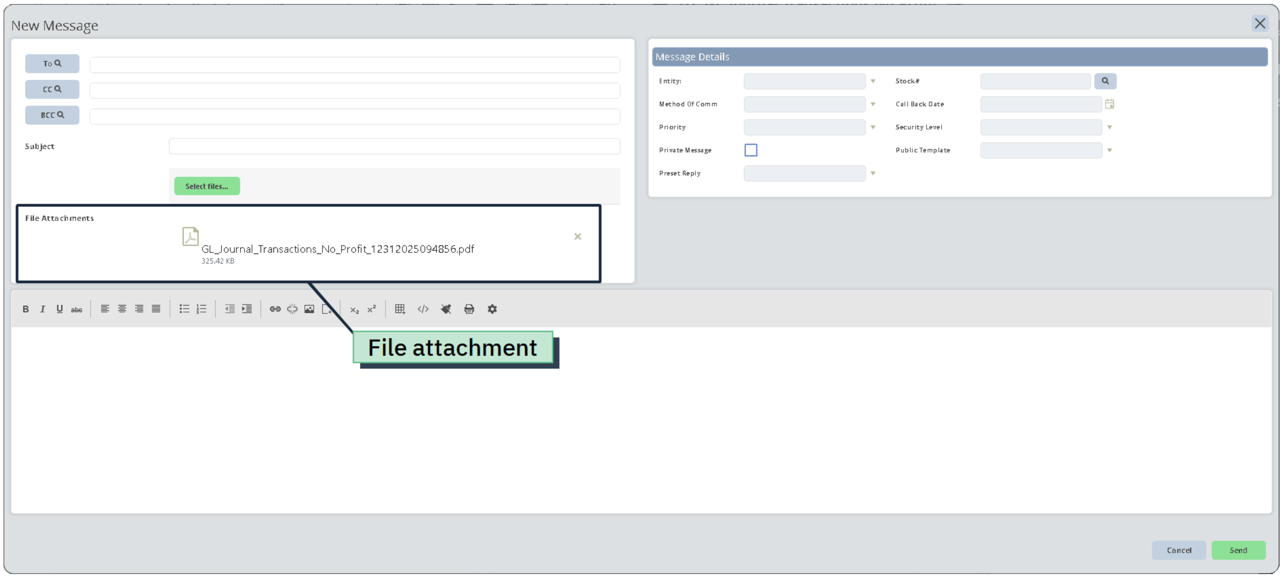

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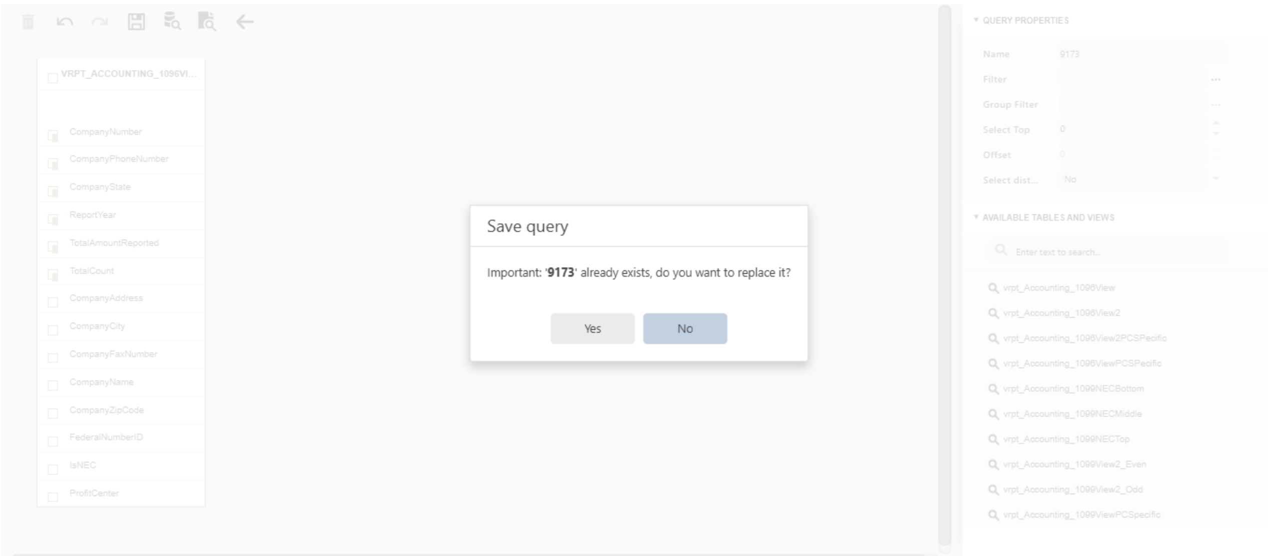
Duplicate query name warning added to Query Builder

In the Query Builder in the Reports module, a notification now displays in the Save query window if the name entered in the **Name** field already exists.



To replace the existing query, simply click the **Yes** button, and the new query is saved. To retain both queries, click the **No** button to return to the Query Builder and change the query name.

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Dashboard

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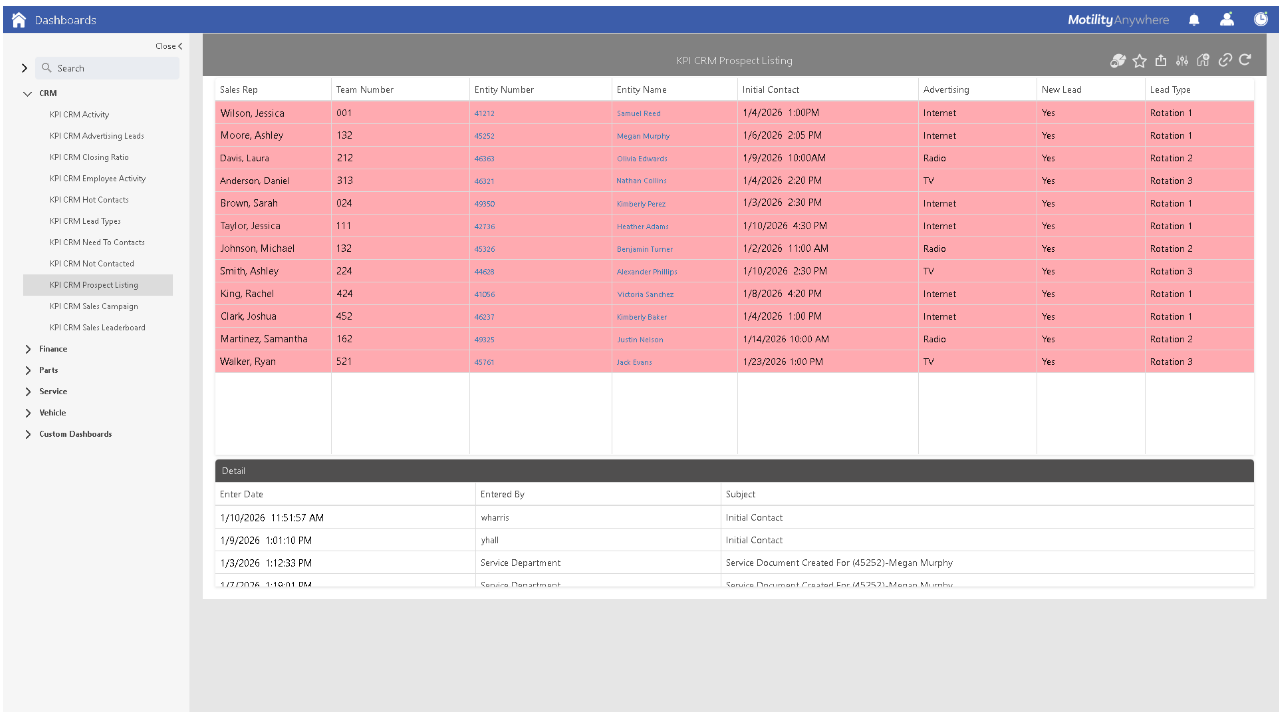
Monitor assigned prospects using a new Dashboard view

The KPI CRM Prospect Listing view is now available in the Dashboard module, which you can use to review key performance indicators (KPI) for sales personnel who have newly assigned prospects who have not yet been contacted.

To access the KPI CRM Prospect Listing view, select the KPI CRM Prospect Listing option in the CRM section of the Dashboard menu. To define criteria for the view, click the Dashboard Parameters icon, as normal. The Dashboard Parameters window displays. Enter dashboard criteria, such as profit center information and how frequently the view should be automatically refreshed. Click the **Submit** button. The KPI CRM Prospect Listing view displays.



In the Prospect Listing section, key prospect details display, such as the assigned sales representative, entity name, and contact date. To display more information, select a prospect in the Prospect Listing section. The date the prospect was added, the employee that added the prospect, and the subject for each appointment displays in the Detail section.

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Security Management

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New security permissions

The following security permissions have been added on the Permissions window in Security Management. For more information about the enhancement related to a security permission, refer to the corresponding topic.

Deal Desking

- Settings → Security Management → User Properties → **Hide ACV on Trades Tab**. For more information, refer to page 14.

Parts & Service

- Settings → Security Management → User Properties → **(PARTS INVENTORY) Restrict From Modifying Part Description**. For more information, refer to page 16.
- Settings → Security Management → User Properties → **Allowed to access Clocked In screen**. For more information, refer to page 30.
- Settings → Security Management → User Properties → **Allowed to Clock Out All Mechanics**. For more information, refer to page 30.
- Settings → Security Management → User Properties → **Allowed to View All Mechanics in Clocked In screen**. For more information, refer to page 30.

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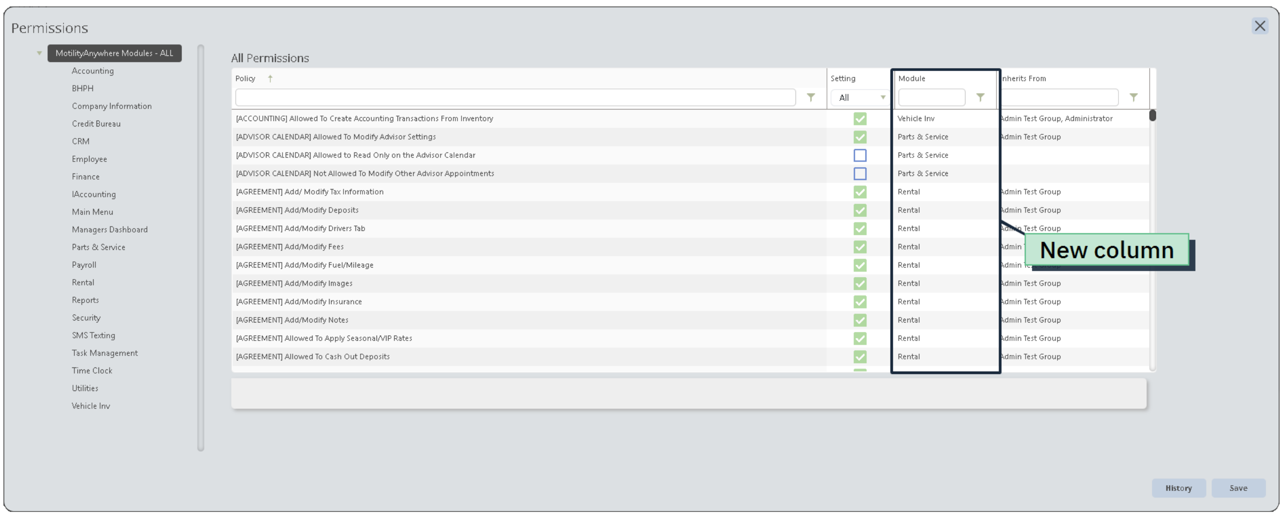
Identify associated module for permissions using new column

When reviewing all security permissions, security managers can now easily determine the module for each permission using a new column on the Permissions window in Security Management. With this enhancement, you can use the new **Module** column to search, filter, and review modules for each permission. In addition, the corresponding module for each permission now displays in the **Module** column in the same row as the corresponding security permission.

*Note - The **Module** column is only available when reviewing all permissions.*



To limit the display to permissions for a module such as Accounting, simply enter that module in the **Module** field.

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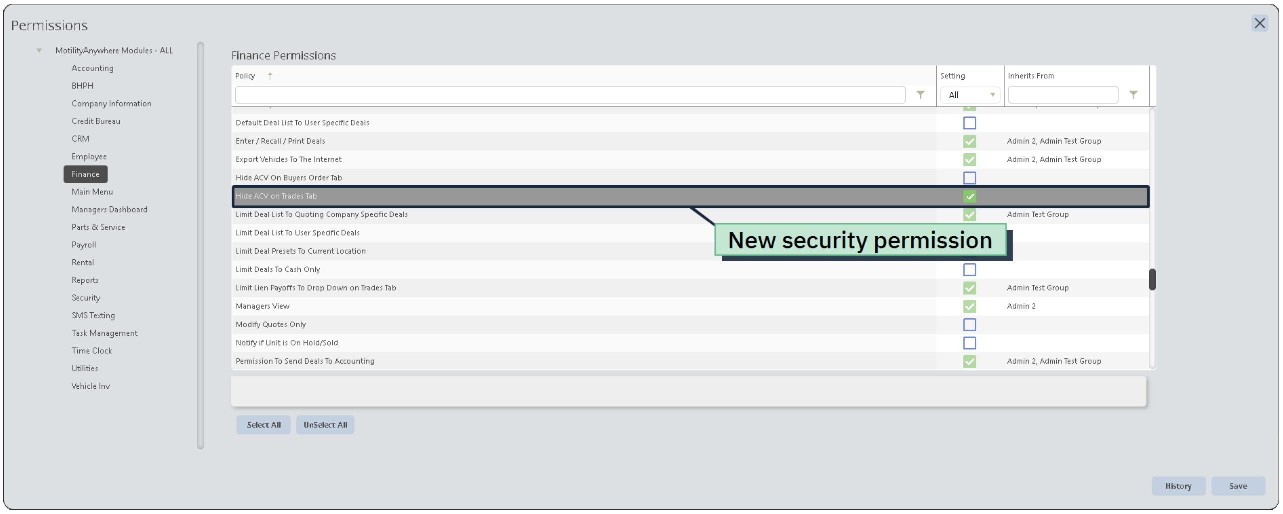
Hide the actual cash value of a trade-in unit

Managers can now control whether finance personnel can view the actual cash value (ACV) of a trade-in unit. Using the new **Hide ACV on Trades Tab** permission on the Permissions window, you can easily determine which employees can review the ACV when negotiating a deal. To hide the **ACV** field on the Trades tab in the Deal screen in the Deal Desking module, simply select the **Hide ACV on Trades Tab** permission on the Permissions window.



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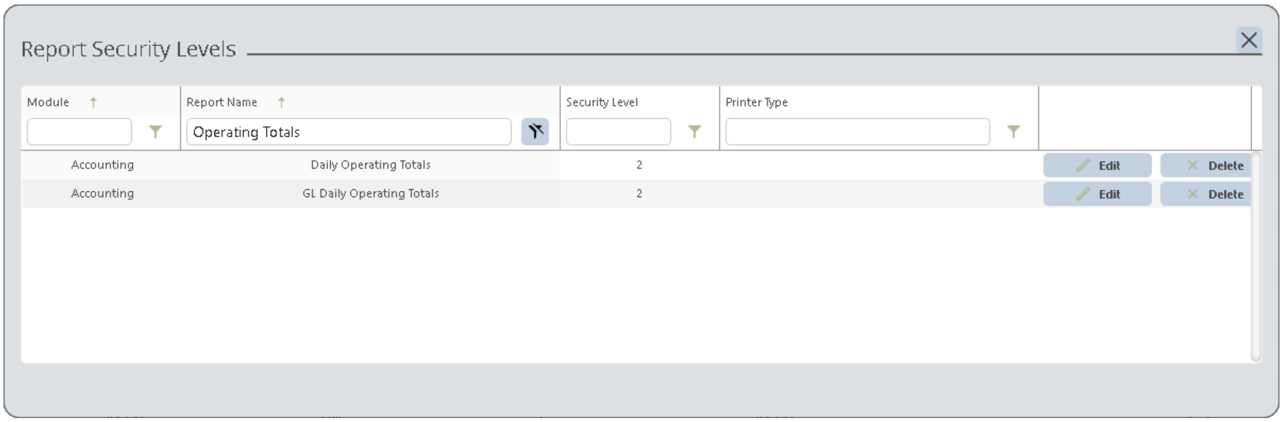
Set security levels for Totals-only access on Daily Operating reports

You can now grant employees access to request summary reports that include month-to-date (MTD) objectives and total objectives used as a forecast of activity for the month. Using new options in the **Report Name** field on the Report Security Levels window, you can define security levels for employees to update the **Totals only** field on corresponding reports.



Security levels used to grant access to the **Totals only** field can now be defined for the following reports:

- GL Daily Operating
- Daily Operating Report Finance
- Daily Operating Report Parts
- Daily Operating Report Service
- Daily Operating Reports Unit Inventory

For example, suppose you want to create a security level with access to the **Totals only** field on the GL Daily Operating report. On the Report Security Levels window, enter **GL Daily Operating** in the **Report Name** field, and then click the **Edit** button for the GL Daily Operating Totals permission. Next, select a security level in the **Security Level** field, and click the **Save** button to save the change. After setting the security level for the report, simply add the same security level to the employee, as normal.

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Miscellaneous Security Management enhancements

- To restrict an employee's access to modifying parts descriptions, select the new Settings → Security Management → User Properties → **(PARTS INVENTORY) Restrict From Modifying Part Description** check box on the Permissions window.
- The **[VIEW TAB:] Retail_Info** permission has been renamed the **[VIEW TAB:] Units** permission to more clearly indicate the permission is used to grant access to view the Units tab on the Deal screen in the Deal Desking module.

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Front-End Enhancements

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Deal Desking

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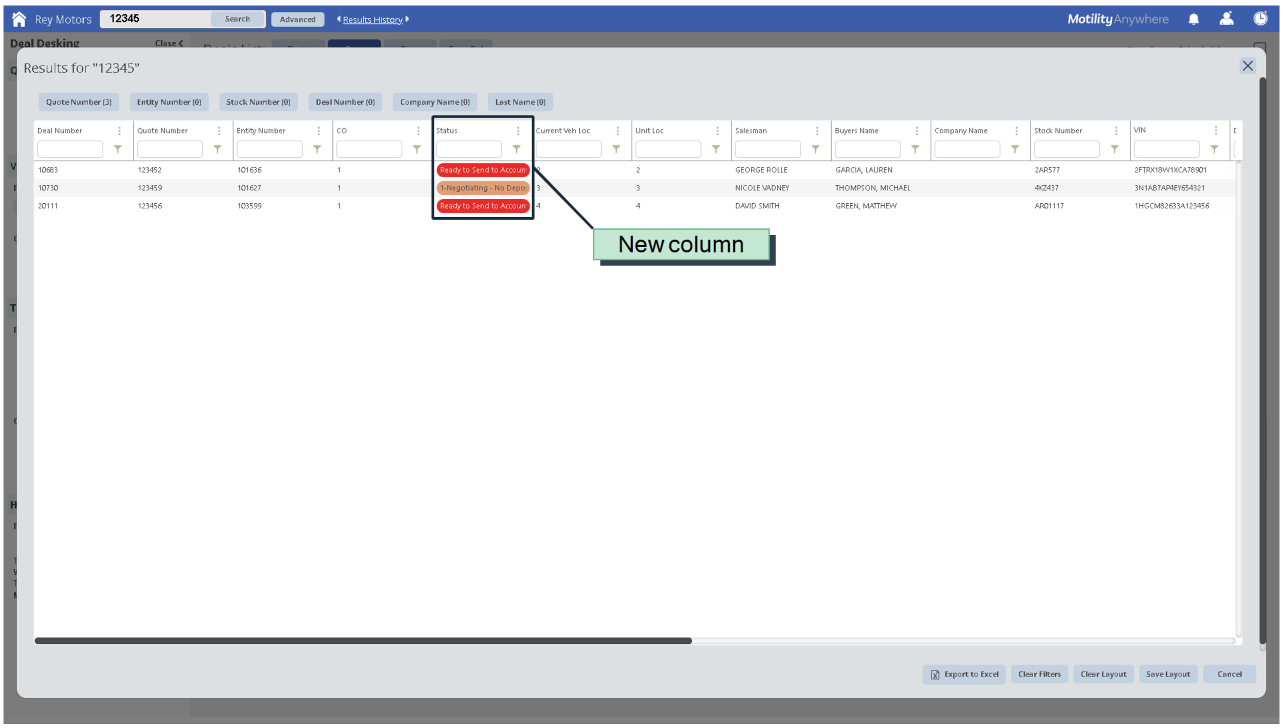
Review deal statuses when searching for deals

When searching for a deal using the Results for Deal window, you can now identify the status of the deal using the new **Status** column. This enhancement is particularly helpful when the same stock number or vehicle identification number (VIN) appears on multiple deals. In addition, you can filter the search results based on deal status by entering a status in the new **Status** field similar to other fields on the Results for Deal window. Deals with the entered status display in the **Status** column.



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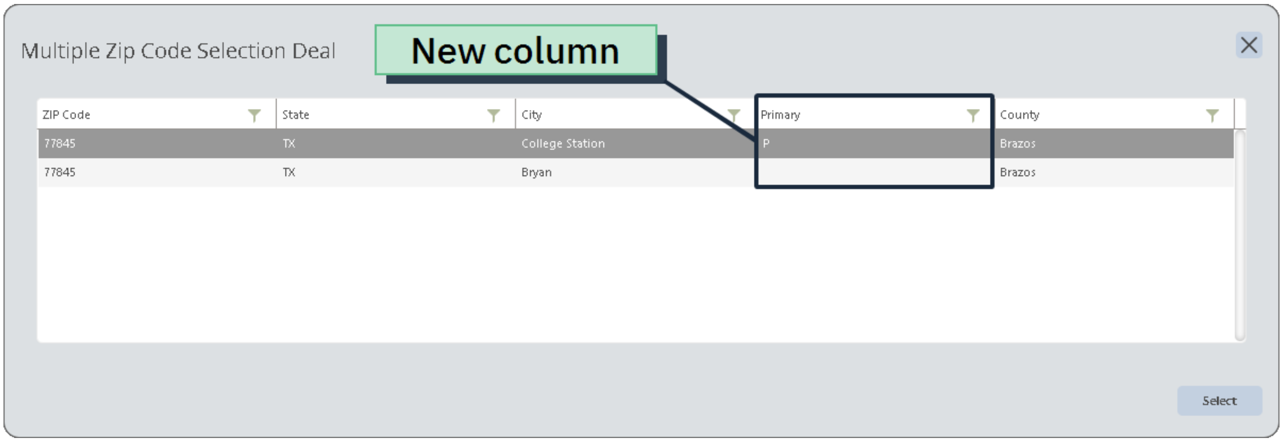
Select primary city from ZIP code

When entering a ZIP code associated with multiple cities, you can now clearly identify the primary city for the ZIP code using a new column on the Multiple Zip Code Selection Deal window. In addition, the primary city now displays as the first option on this window.



When the Multiple Zip Code Selection Deal window displays, the primary city is now automatically highlighted and displays at the top of the list. In addition, **P** displays in the new **Primary** column for the primary city. To select the primary city, simply press the ENTER key or click the **Select** button. The Multiple Zip Code Selection Deal window closes, and the city, county, and state are automatically entered in the corresponding fields on the Quote window or the Deal window, as normal.

Additional information

- Unincorporated cities without names have been removed from the cities associated with ZIP codes.

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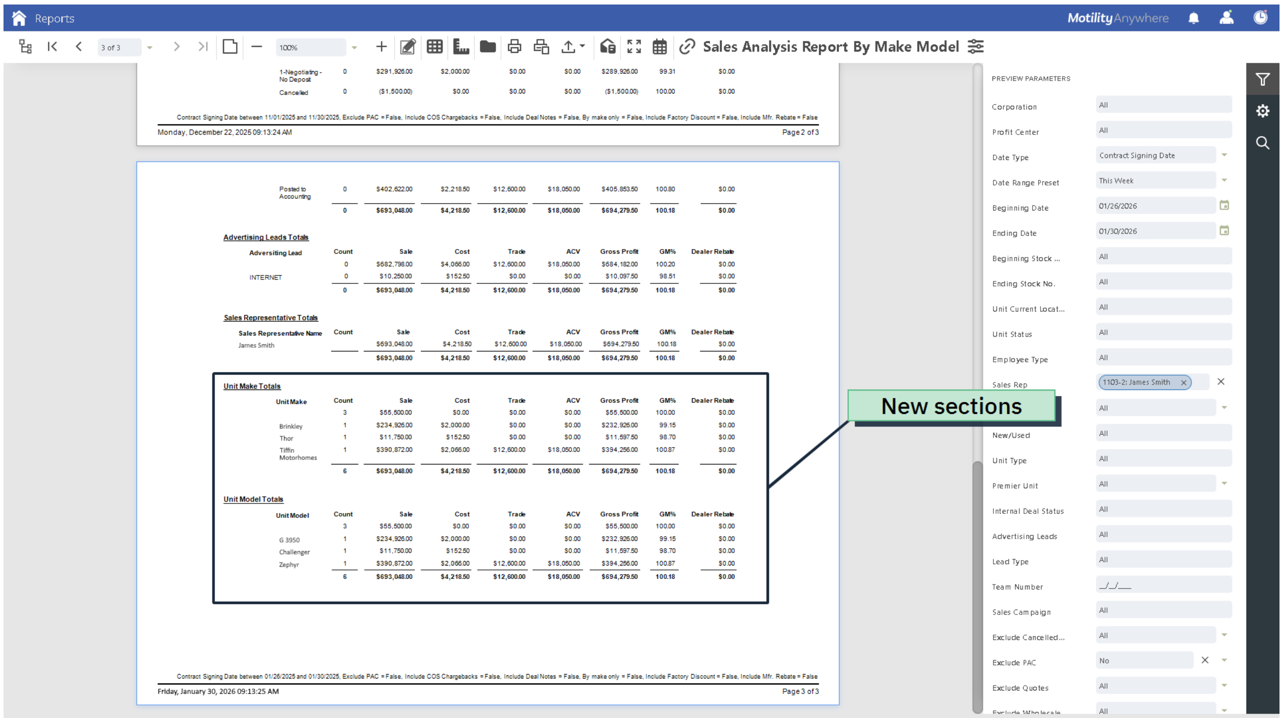
Compare sales amounts by make and model

Using the Sales Analysis Report By Make Model report, you can now review and compare the total sales amounts by unit make and model. The sales amounts, such as the sale price, the cost, and the gross profit, display in the new Unit Make Totals section and the Unit Model Totals section on the Sales Analysis Report By Make Model report.



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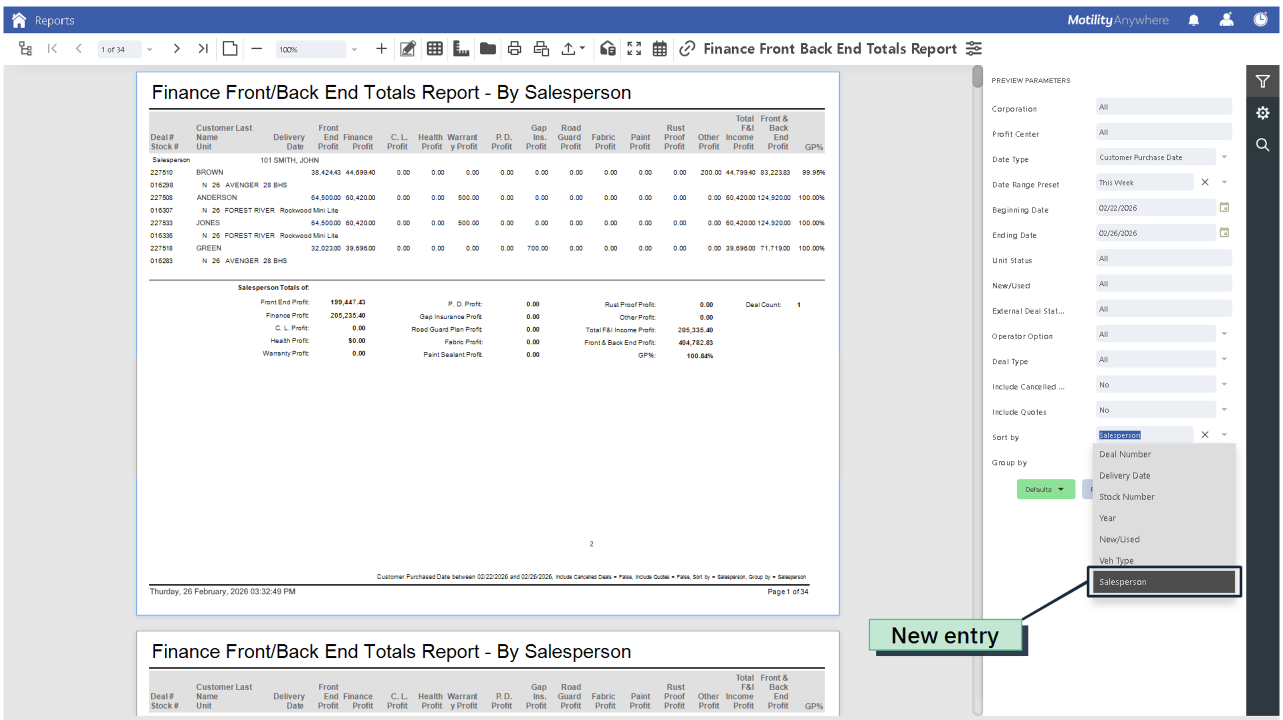
Review the Finance Front/Back End Totals report by salesperson

You can now review profit amounts for deals based on salesperson using the Finance Front/Back End Totals report in the Reports module, which can be helpful when reviewing a salesperson's commissions for payroll. To review the report by salesperson, simply select **Salesperson** in the **Sort by** field and click the **Run** button. The Finance Front/Back End Totals report displays, allowing you to review deals sorted by salesperson and profit totals for each salesperson.



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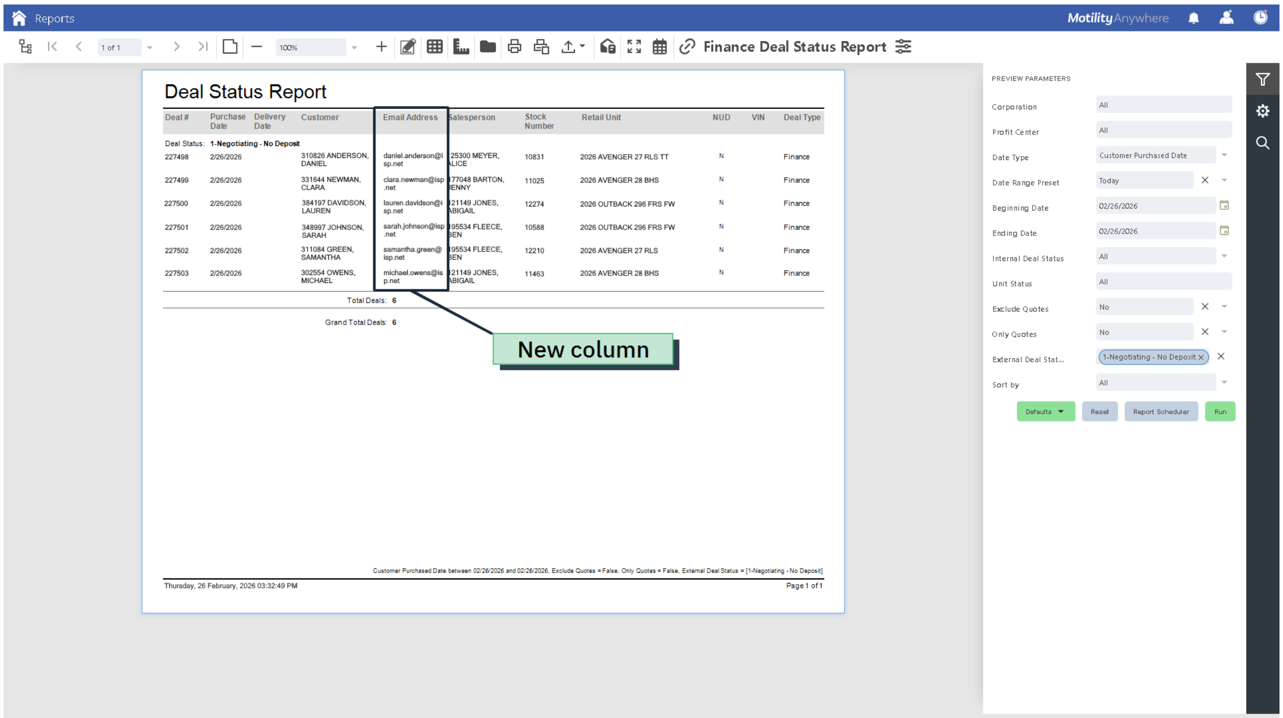
Review Email addresses on the Finance Deal Status report

A new column has been added to the Finance Deal Status report, allowing you to view customers' Email addresses at a glance. To review customers' Email addresses, simply request the Finance Deal Status report, as normal. The Email address of the customer on the deal displays in the new **Email Address** column.



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Miscellaneous Deal Desking enhancements

- When accessing a deal in read-only mode, you can now view the Finance Deposit Receipt Laser report by clicking the **V** button on the Deposits subtab on the Quote tab. Previously, the **V** button was not available when a deal was locked by another user. Simply click the **V** button to display the Finance Deposit Receipt Laser report, where you can review and print the report, even when another user is currently accessing the deal.
- When creating or updating a deal preset, you can now quickly start a new quote or deal using the preset, helping you save time when working with a customer such as when creating a deal preset for an out-of-state customer. When a deal preset is saved and the Deal window or Quote window is closed, the Start Deal window or the Start Quote window now displays, and the deal preset is automatically entered in the **Preset** field. To start a deal or quote, simply enter information as needed and click the **Start New Deal** button or the **Start New Quote** button, as normal.
- Details for aftermarket items are now automatically updated in the AppOne® Portal application when changes are made in the Deal Desking module and vice versa, reducing the need to manually update the information.

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Unit Inventory

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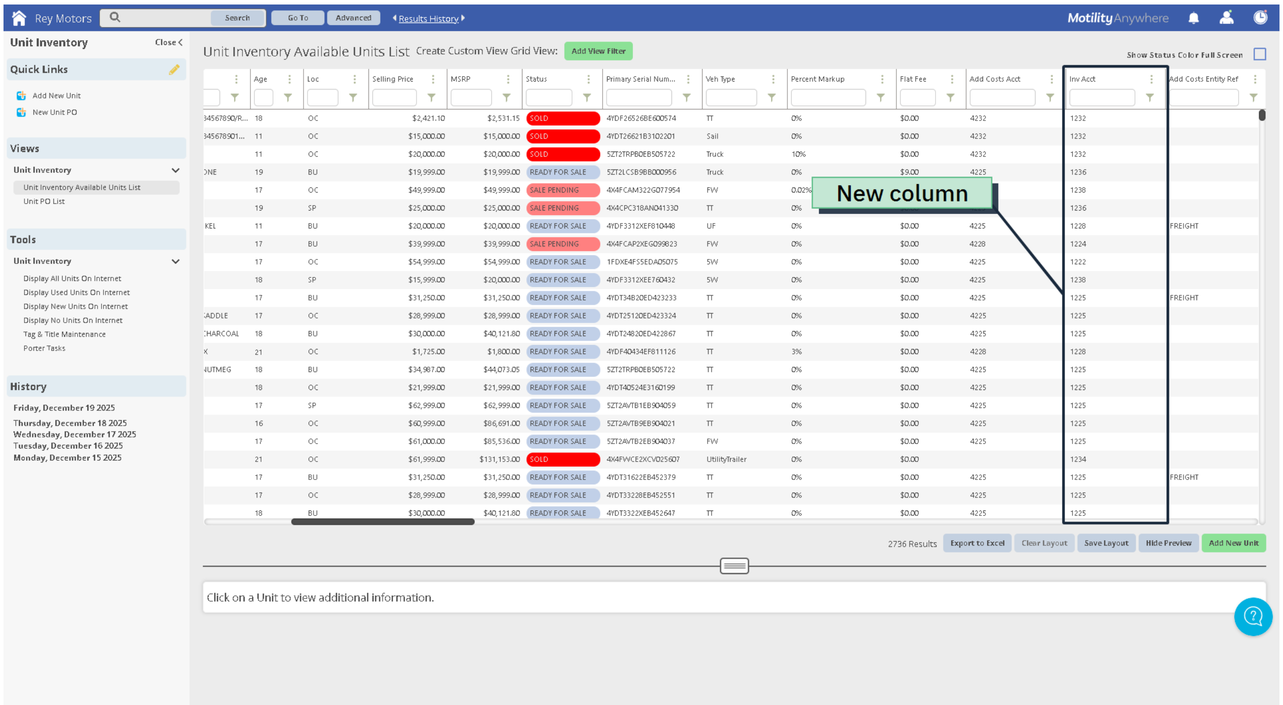
Review inventory GL accounts for available units

Using the new **Inv Acct** column, you can easily identify the inventory general ledger (GL) accounts for each unit when reviewing units on the Unit Inventory Available Units List screen in the Unit Inventory module. In addition, to search for a unit by GL account, simply enter a GL account number in the new **Inv Acct** field on the Unit Inventory Available Units List screen.



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Dynamically sort Unit Inventory reports

You can now dynamically sort units on various Unit Inventory reports directly on the report, helping you easily organize the information to review. To dynamically sort the results on a report, click a column header on the report. For example, click the **Make** column header to sort the units by the unit make.

The following reports have been updated:

- Unit Inventory Accounting report
- Unit Inventory Floorplan report
- Unit Inventory Hot Sheet report
- Unit Inventory Manager report
- Unit Inventory Only report
- Unit Inventory SalesRep report
- Units Not Floored report

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Fixed Operations Enhancements

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Parts & Service

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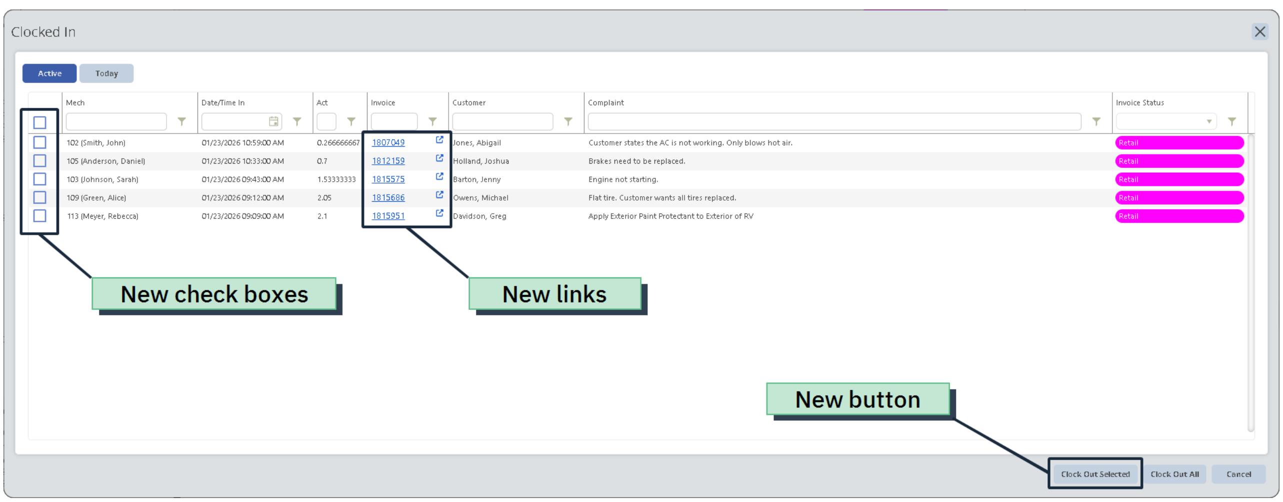
Multiple enhancements for the Clocked In window

Multiple enhancements are available for the Clocked In window in the Parts & Service module to streamline clock-in and clock-out processes. You can now easily clock out multiple mechanics at once as well as quickly access the service invoices on which mechanics are working. In addition, you can now review the clock-in and clock-out activity for the current day using a new tab. Finally, to help you perform tasks more quickly, the Clocked In window can now be accessed using a new link.

Clock out multiple mechanics at once and quickly access service invoices

The process for clocking out mechanics has been streamlined, saving you time when clocking out multiple mechanics. To clock out mechanics, simply select the new check box for each mechanic on the Active tab on the Clocked In window. Then click the new **Clock Out Selected** button. The selected mechanics are clocked out.



In addition, you can now quickly access the service invoices on which mechanics are working or have worked for the current day. Simply click a link in the **Invoice** column to display the invoice on the Service Invoice window.

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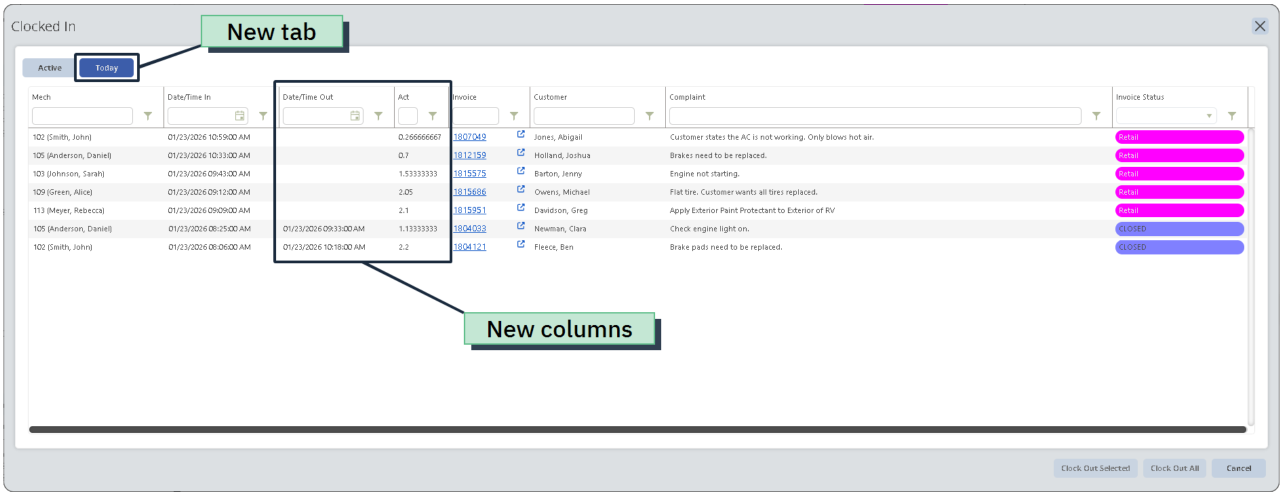
Review activity for the current day

You can now review the clock-in and clock-out activity for the current day using the Today tab on the Clocked In window. The date and time the mechanic clocked out from the job display in the new **Date/Time Out** column, and the amount of time for which a mechanic was clocked in displays in the new **Act** column.

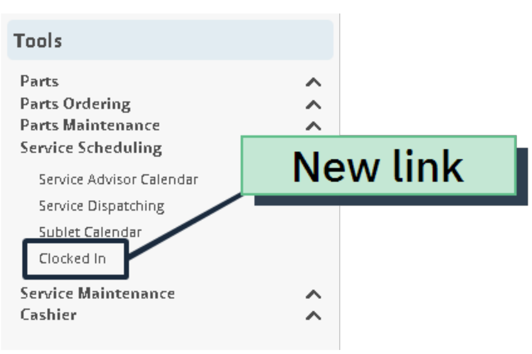
*Note - The new **Act** column is also available on the Active tab on the Clocked In window.*



Quickly access the Clocked In window

You can now access the Clocked In window by simply clicking the *Clocked In* link in the Parts & Service → Tools → Service Scheduling section. In addition, you can now add a link to the Clocked In window in the Quick Links section using the User Settings tab on the Settings screen.

*Note - The Clocked In window can be accessed by clicking the **Clocked In** button on the Dispatch Calendar window, as normal.*



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Additional information

- The width of the **Complaint** column has been increased, allowing you to review more of the description. The **Cause** column and the **Correction** column have been removed.
- The employee number and name of the mechanic display in the new **Mech** column. Previously, this information displayed in the **Employee Number** column and the **Employee Name** column, which have been removed.

New security permissions

- To grant an employee access to the Clocked In window, select the new Settings → Security Management → User Properties → **Allowed to access Clocked In screen** check box on the Permissions window in Security Management.
- To grant an employee access to clock out all mechanics using the Clocked In window, select the new Settings → Security Management → User Properties → **Allowed to Clock Out All Mechanics** check box on the Permissions window in Security Management.
- To grant an employee access to view all mechanics on the Clocked In window, select the new Settings → Security Management → User Properties → **Allowed to View All Mechanics in Clocked In screen** check box on the Permissions window in Security Management.

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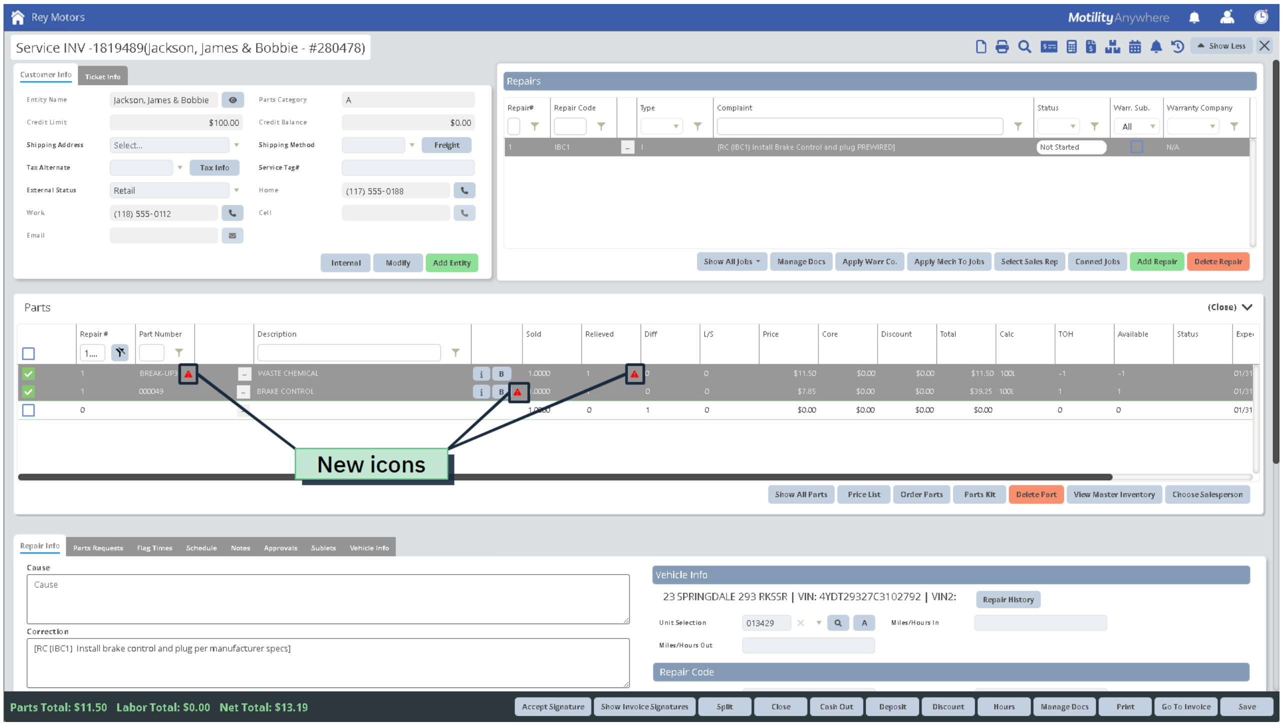
Identify negative part quantities on invoices

You can now quickly identify when the part quantity in a preferred bin falls below zero directly on the Parts Invoice and Service Invoice windows. A new warning icon displays when the total on hand (TOH) for the preferred bin for a part is less than zero.



The new (Warning) icon displays to the right of the **B** button on the Parts Invoice window and the Service Invoice window when the quantity of a part in the preferred bin is below zero. When you hover the mouse cursor over the (Warning) icon, the message **Preferred bin TOH is less than 0** displays. To change the bin from which the part is relieved, click the **B** button to display the Bin Locations window, as normal.

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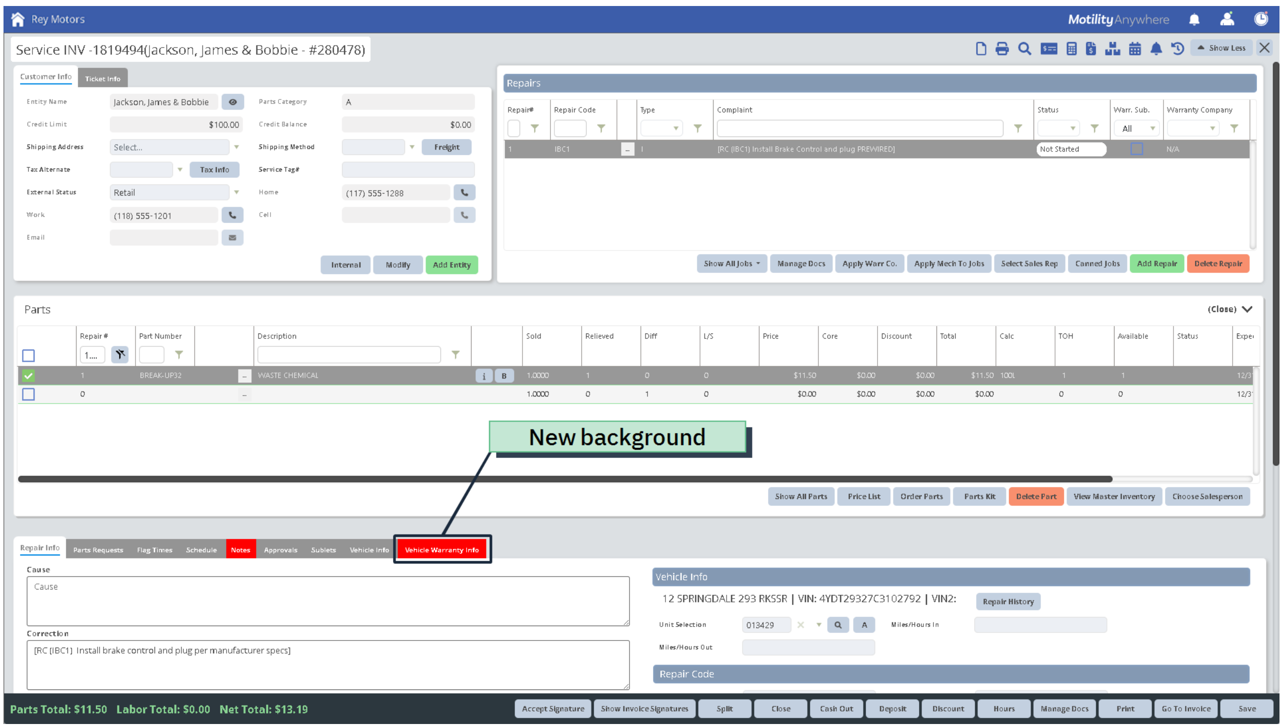
Identify attached warranty information

Personnel can now easily determine when warranty information is available on the Vehicle Warranty Info tab on the Parts Invoice window and the Service Invoice window. When information is present on the Vehicle Warranty Info tab, the tab now displays with a red background, alerting you that warranty information is available to review.

Note - The background for the Vehicle Warranty Info tab remains red through invoicing.



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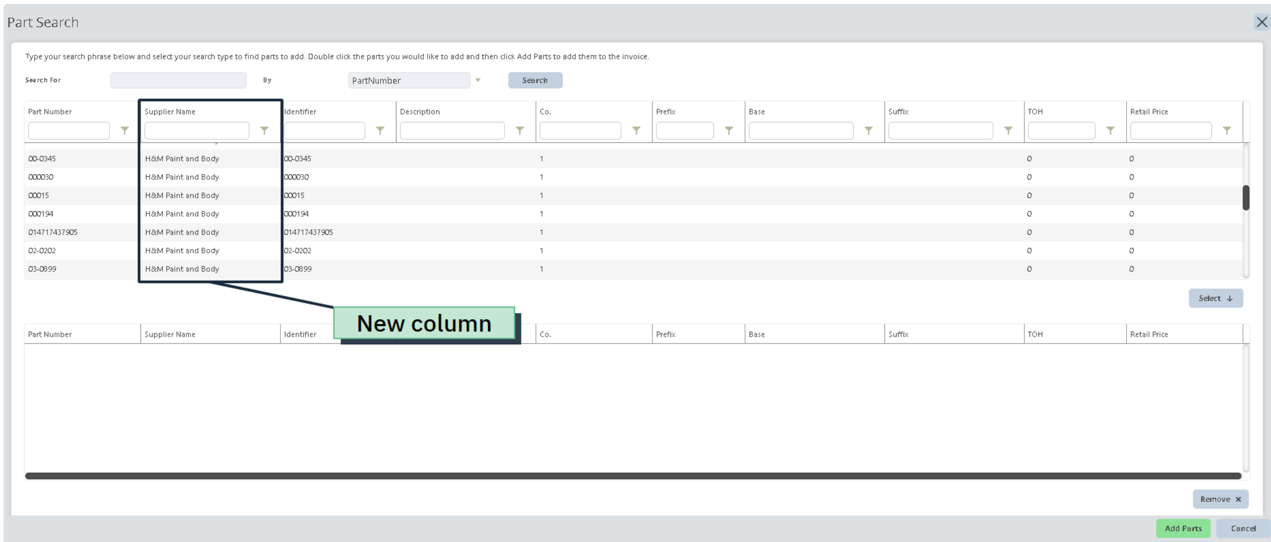
Review supplier when searching for parts

When searching for a part to add to a parts invoice or service invoice, you can now identify the supplier for the part. In addition, you can filter the search results based on the supplier.



When you search for parts using the Part Search window, the suppliers for the parts matching the search criteria now display in the new **Supplier Name** column.

To search for a part by supplier, simply enter a supplier in the new **Supplier Name** field on the Part Search window. Parts provided by the entered supplier display in the **Supplier Name** column.

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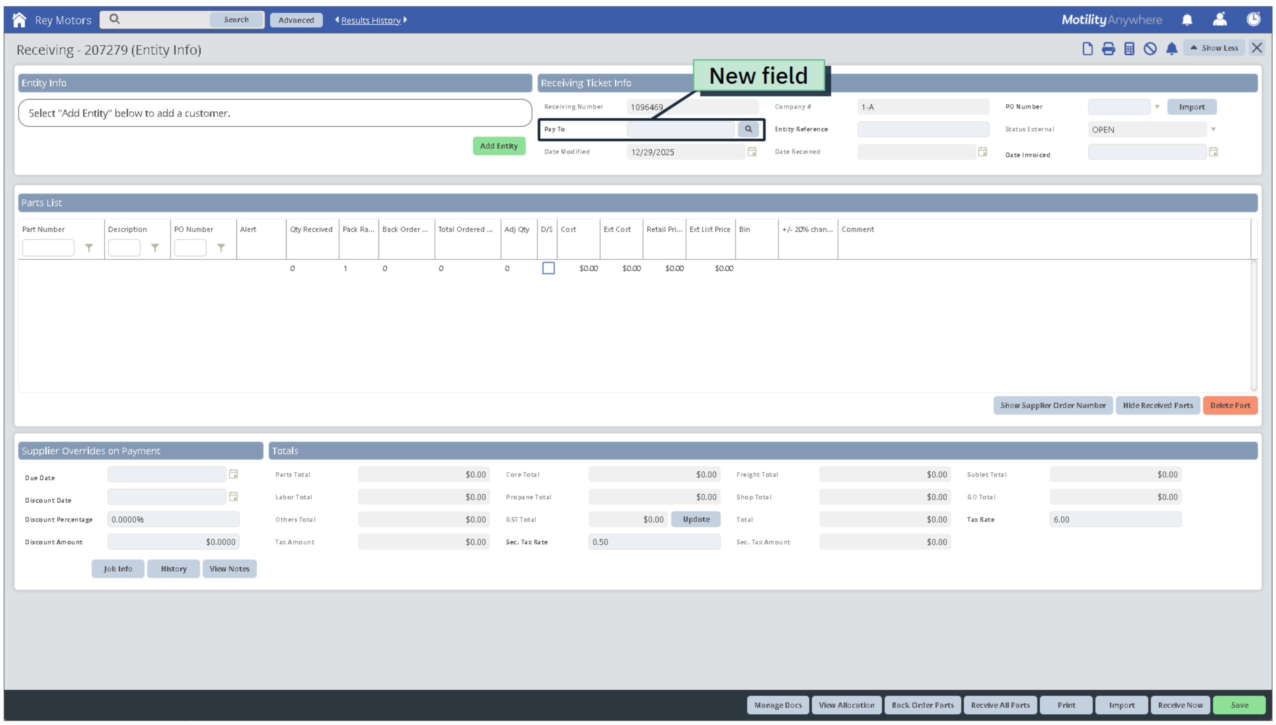
Search for entity to pay on receiving tickets more efficiently

When adding or updating a receiving ticket, you can now use a streamlined process to enter an entity to pay on purchase orders. To enter a specific entity number, simply enter the entity number directly in the **Pay To** field.

*Note - If the entity number entered in the **Pay To** field does not match an entity number in the system, the Entity Search window displays, where you can search for an entity, as normal.*



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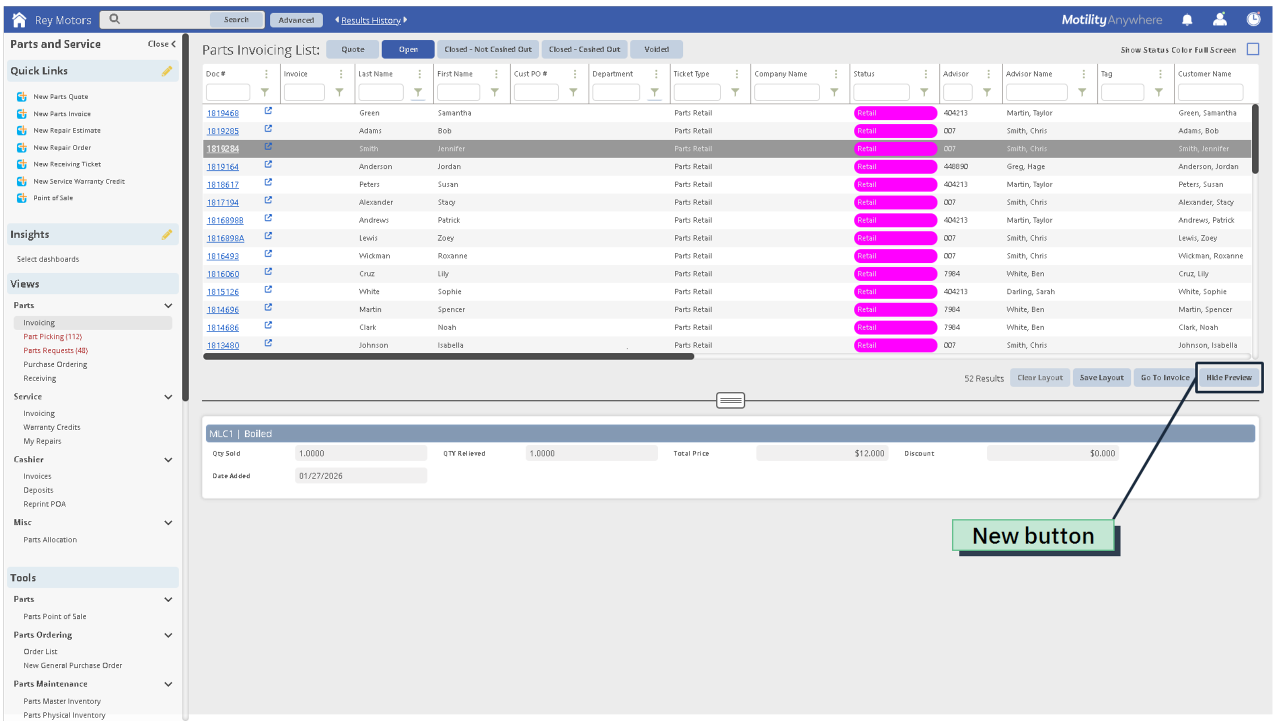
Hide previews for parts and service invoice lists

When reviewing the list of parts invoices or service invoices on the Parts Invoicing List or the Service Invoicing List in the Parts & Service module, you can now hide the preview of the highlighted invoice. To hide invoice previews, simply click the new **Hide Preview** button on the Parts Invoicing List screen or the Service Invoicing List screen. The unlabeled Preview section no longer displays, and the list of invoices is expanded to fit the screen.



In addition, when you hide invoice previews on the Parts Invoicing List screen, the Preview section no longer displays on the Service Invoicing List screen, and vice versa. Furthermore, this setting remains in effect when you subsequently access the screen.

To display invoice previews, simply click the **Show Preview** button, and the Preview section displays.

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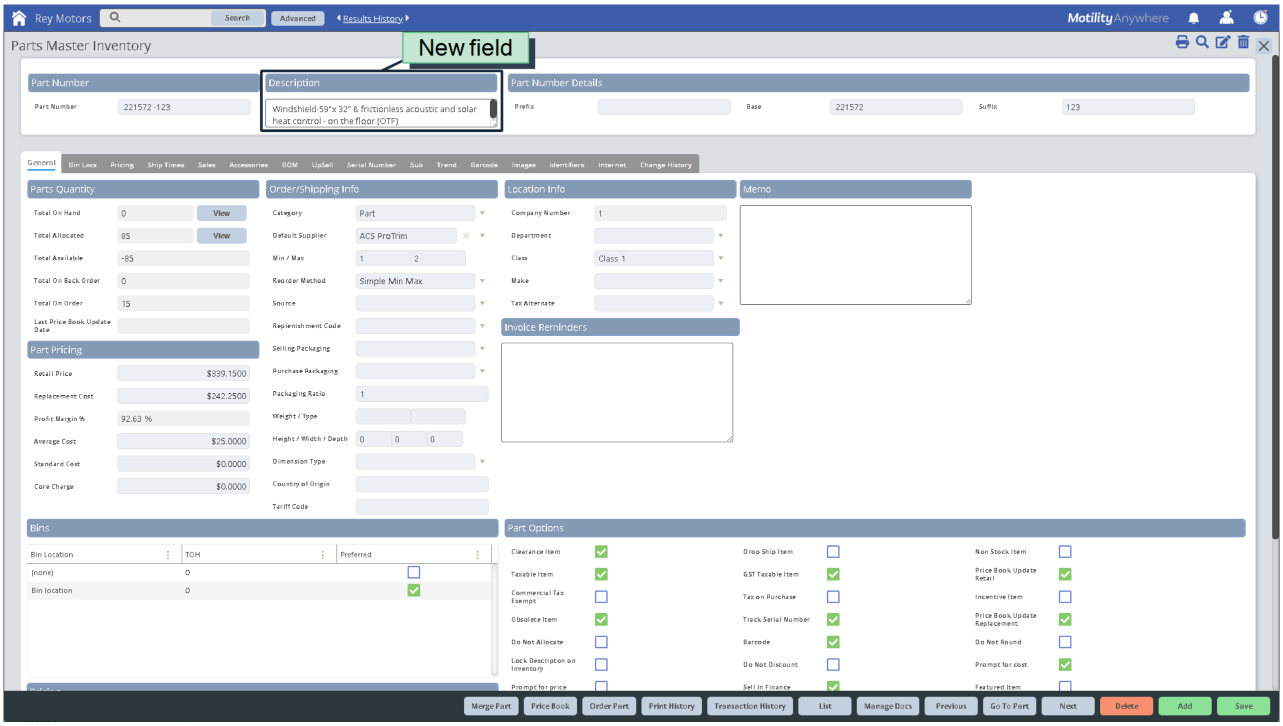
Review full descriptions of parts in resized field

When reviewing parts details on the Parts Master Inventory screen in the Parts and Service module, you can now view the full description for a part in a new field. With this enhancement, you can now resize the field by clicking and dragging the field, allowing you to view all parts details as needed.



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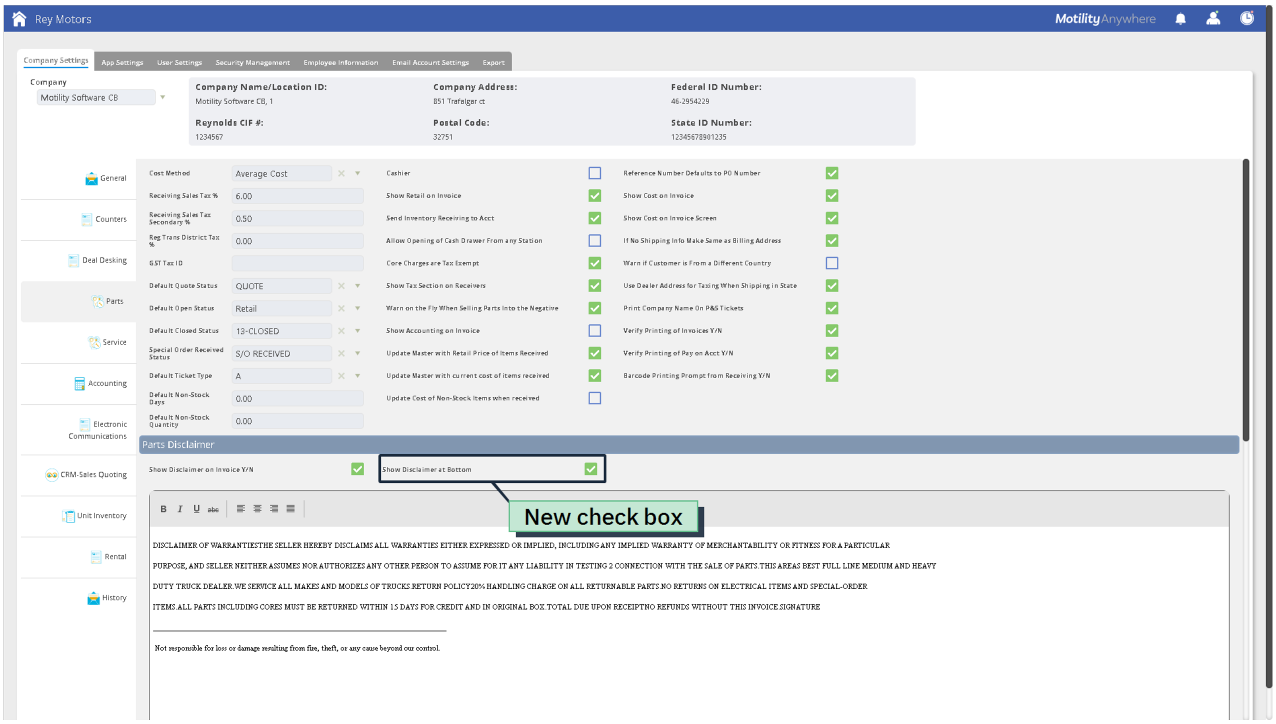
New display option for parts disclaimers

You can now display parts disclaimers at the bottom of parts invoices created using the Parts & Service module. Previously, parts disclaimers automatically displayed at the top of a parts invoice. Using a new option on the Parts subtab on the User Settings tab on the Settings screen, you can choose to display the disclaimer at the top or bottom of the invoice.



To display the parts disclaimer at the bottom of an invoice, simply select the new **Show Disclaimer at Bottom** check box on the Parts subtab on the Company Settings tab. To display the disclaimer at the top of an invoice, clear this check box.

When the parts invoice is printed, the disclaimer prints based on the setting selected.

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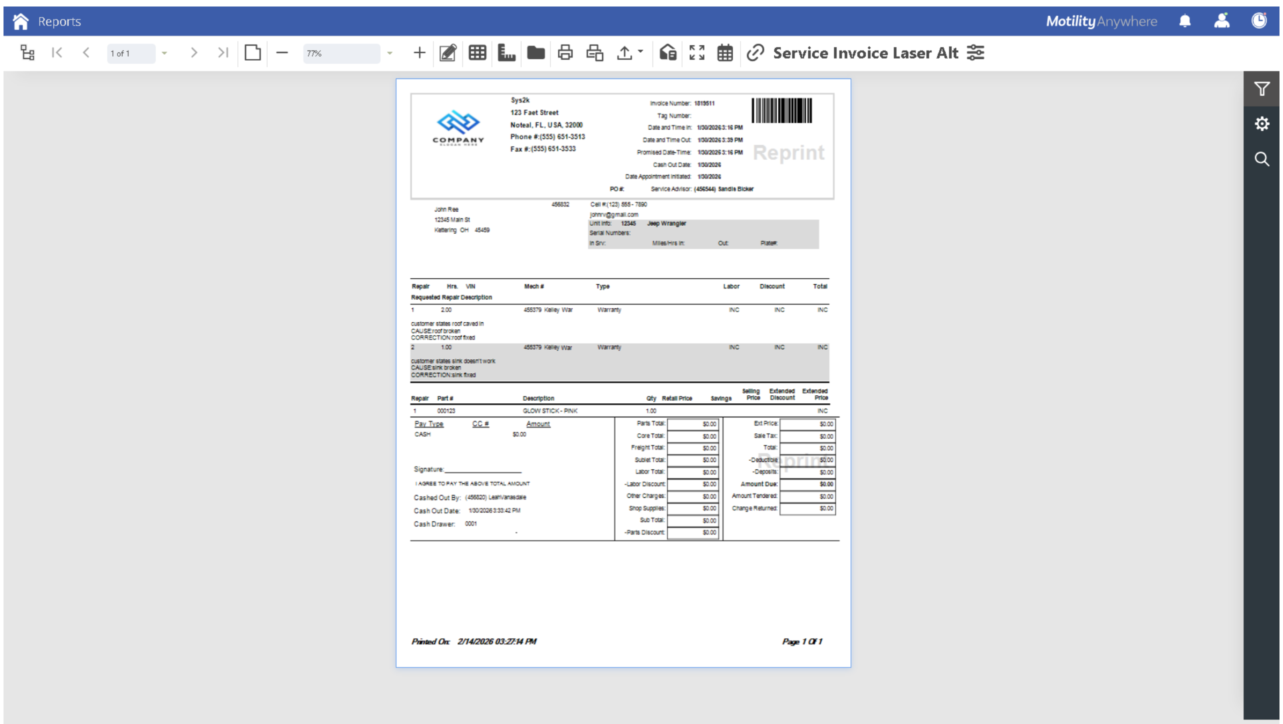
Review streamlined service invoices using the new Service Invoice Laser Alt report

Personnel can now review streamlined invoices using the new Service Invoice Laser Alt report in the Parts & Service module. Invoices produced using the Service Invoice Laser Alt screen exclude part prices that display on the standard Service Invoice Laser report. In addition, the **Mech #** column has been updated to include the mechanic's name as well as the ID number.

To access the Service Invoice Laser Alt report, click the **Print** button on the Service Invoice window. The Print Menu window displays, where you can select the version of the report to print. The Service Invoice Laser Alt report displays in the Reports module.



To activate the Service Invoice Laser Alt report, the Service Invoice Laser Alt report must be selected on the Other tab on the WebReport Settings screen. To access the Other tab on the WebReport Settings screen, select Reports module → Reports Settings → WebReport Settings screen → Other tab. Then select **Service Invoice Laser Alt** in the **Default Service Invoice Laser Report printing** field. The Service Invoice Laser Alt report can then be accessed by clicking the **Print** button on a service invoice on the Service Invoice window.

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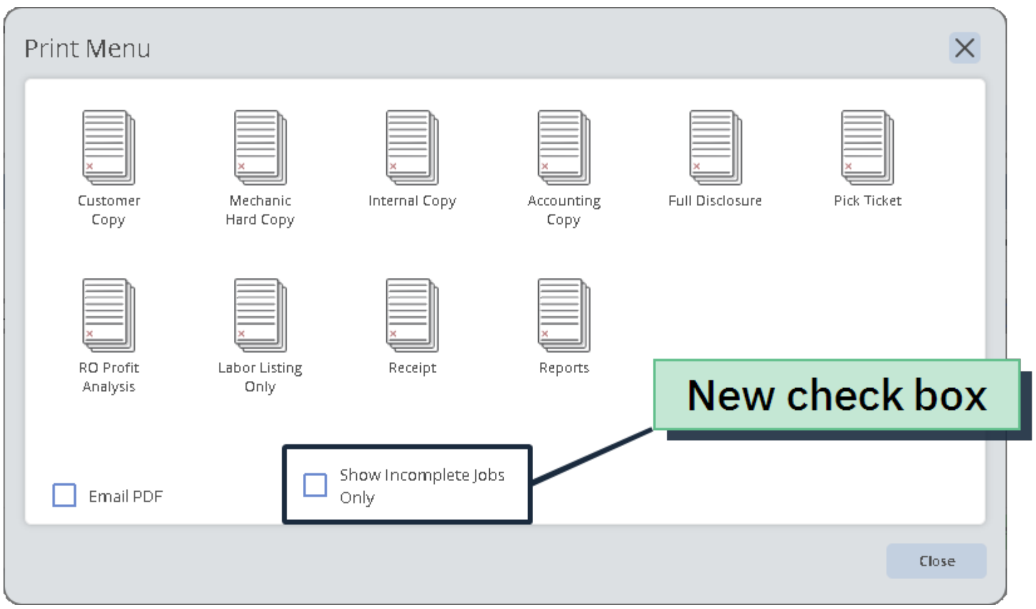
Quickly review incomplete repairs on service invoices

Using a new option for the mechanic's copy of the Service Invoice Laser report, you can review incomplete jobs, or repairs, on a service invoice. This option helps you monitor the progress of the repairs, identify bottlenecks in the service department, and manage technician productivity in real time. To request the report, access a service invoice and click the **Print** button, as normal. The Print Menu window displays. Select the new **Show Incomplete Jobs Only** check box, and click the **Mechanic Hard Copy** button. The mechanic's copy of the Service Invoice Laser report displays with information about the incomplete jobs on the invoice.



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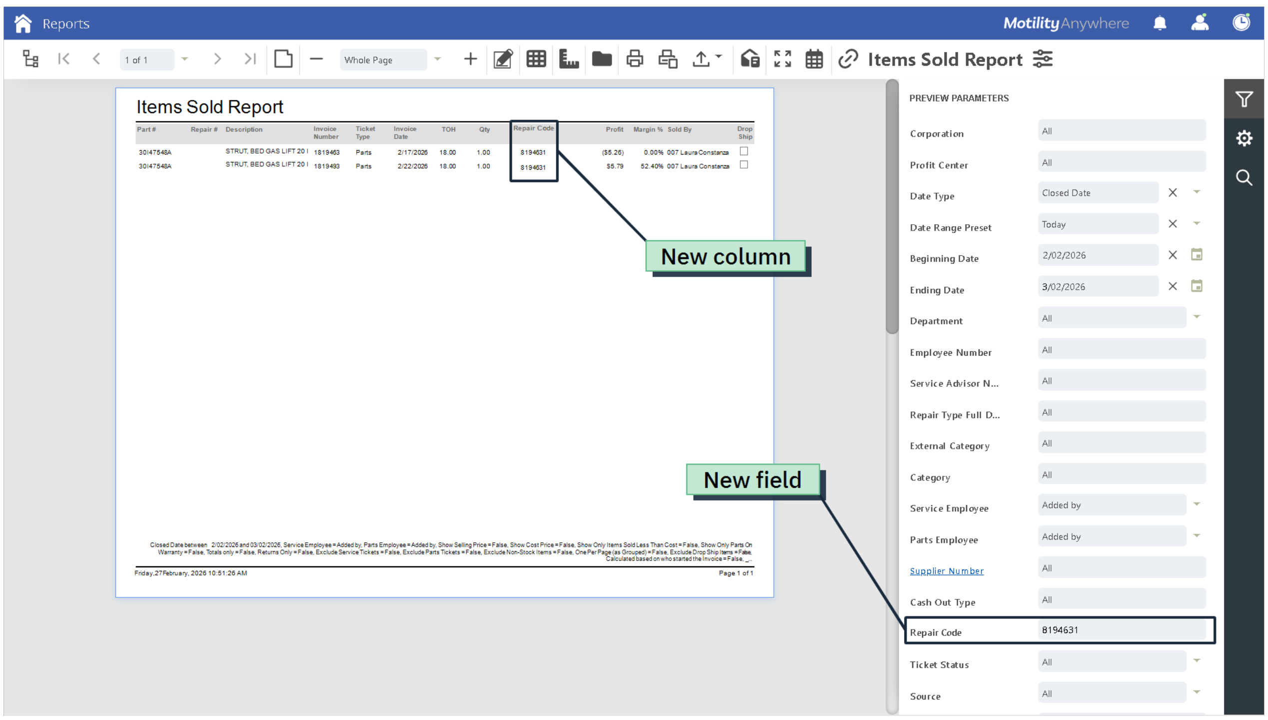
Review repair codes on the Items Sold report

When reviewing the Items Sold report in the Reports module, you can now easily identify parts sales sold by repair code. With this enhancement, the repair code for each parts sale displays in the new Repair Code column. Having this code available on the report simplifies identifying repair codes, which can be helpful when you use designated repair codes to track sales made by specific employees.

In addition, you can quickly display results for a specific repair code by entering the code in the new **Repair Code** field on the Items Sold Report screen. Enter additional report criteria, and click the **Run** button to request the Items Sold report. Only those transactions with the entered repair code display.



For example, to review all parts sales with **8193631** entered as the repair code, simply enter **8193631** in the new **Repair Code** field when requesting the report. Only parts sold with the 8193631 repair code display on the report.

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Business Office Enhancements

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Accounting

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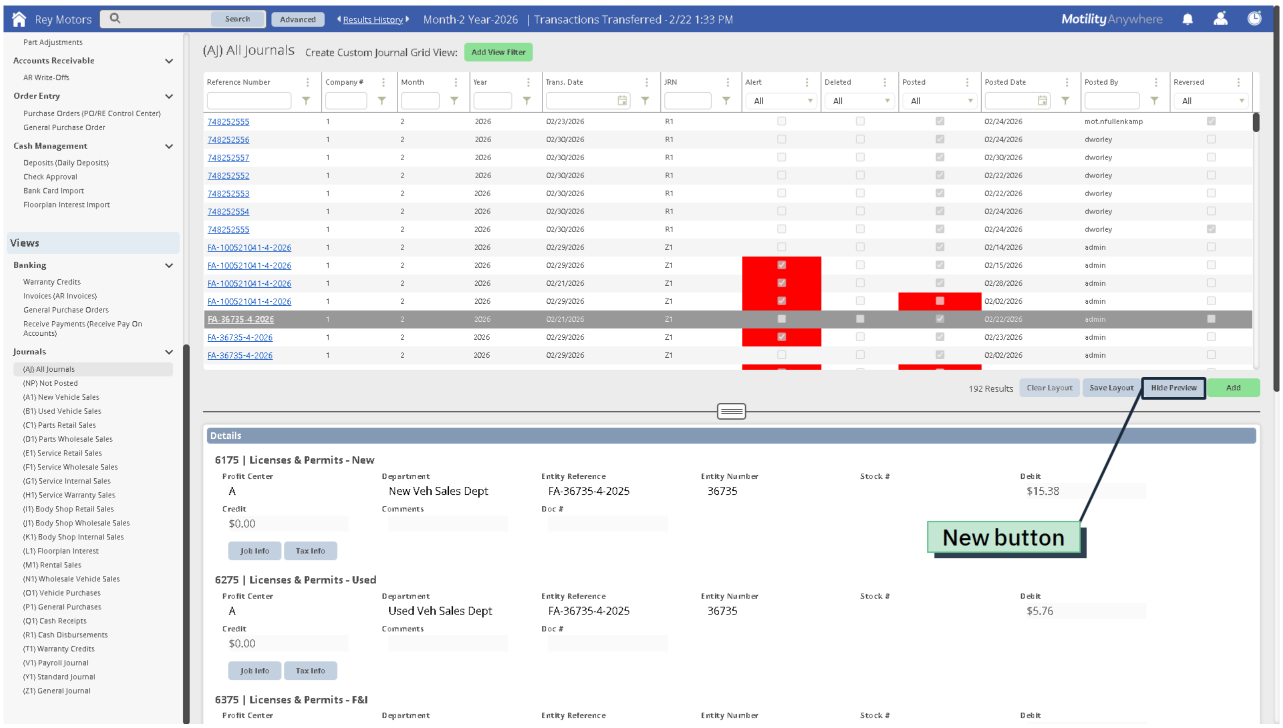
Hide previews for accounting journals

When reviewing a list of journals in the Accounting module, you can now hide the preview of the highlighted journal, allowing you to review a larger list of journals. To hide the journal preview displayed when a row is selected, simply click the new **Hide Preview** button on any screen in the Journals section. The unlabeled Preview section no longer displays, and the list of invoices is expanded to fit the screen.



When you hide journal previews, the Preview section no longer displays on other journal screens. Furthermore, the setting for this section is retained for subsequent access to these screens.

To display journal previews, simply click the **Show Preview** button, and the Preview section displays.

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Add units while entering transactions

You can now add a new unit to inventory while entering a journal entry without leaving the Accounting module. If you are posting a transaction and enter a stock number that is not found in the Unit Inventory module, a message window displays prompting you to add the unit directly.

To add the unit, click the **Yes** button on the message window. A second message window displays allowing you to either use the next stock number available or enter a new stock number.

Click the **Confirm** button to use the next stock number available. The Unit Inventory window displays, where you can enter details for the new unit. Alternatively, click the **Close** button to use a new stock number. The New Unit window displays, where you can enter unit details, copy from existing units, and review possible duplicates.

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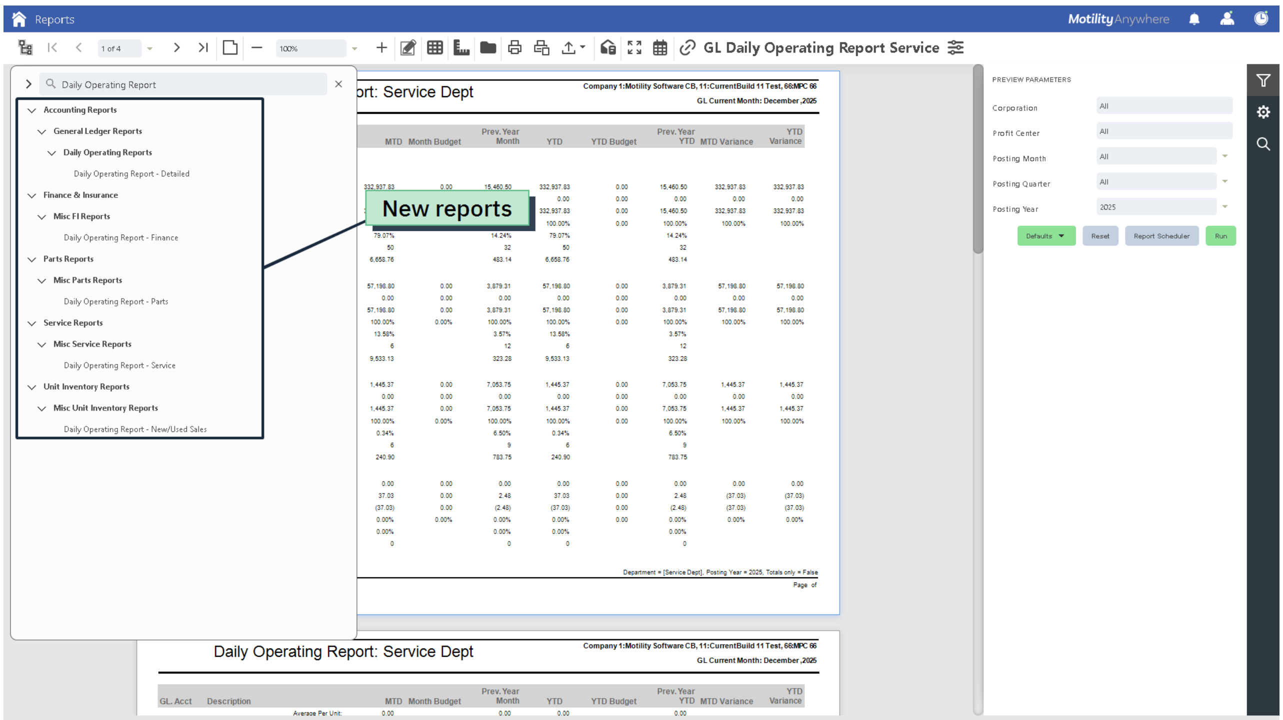
New Daily Operating reports available

Using new Daily Operating reports in the Reports module, you can review an overview of daily expenses and revenue for individual departments using department-specific reports. Each new report displays a summary of daily cash flow for the selected department and time period, including details such as general ledger (GL) account numbers, account descriptions, and budgets for the department.



To access the new reports, use the following menu paths in the Reports module.

- **Daily Operating Report - Finance.** Finance & Insurance → Misc FI Reports → Daily Operating Report - Finance
- **Daily Operating Report - Parts.** Parts Reports → Misc Parts Reports → Daily Operating Report - Parts
- **Daily Operating Report - Service.** Service Reports → Misc Service Reports → Daily Operating Report - Service
- **Daily Operating Report - New/Used Sales.** Unit Inventory Reports → Misc Unit Inventory Reports → Daily Operating Report - New/Used Sales

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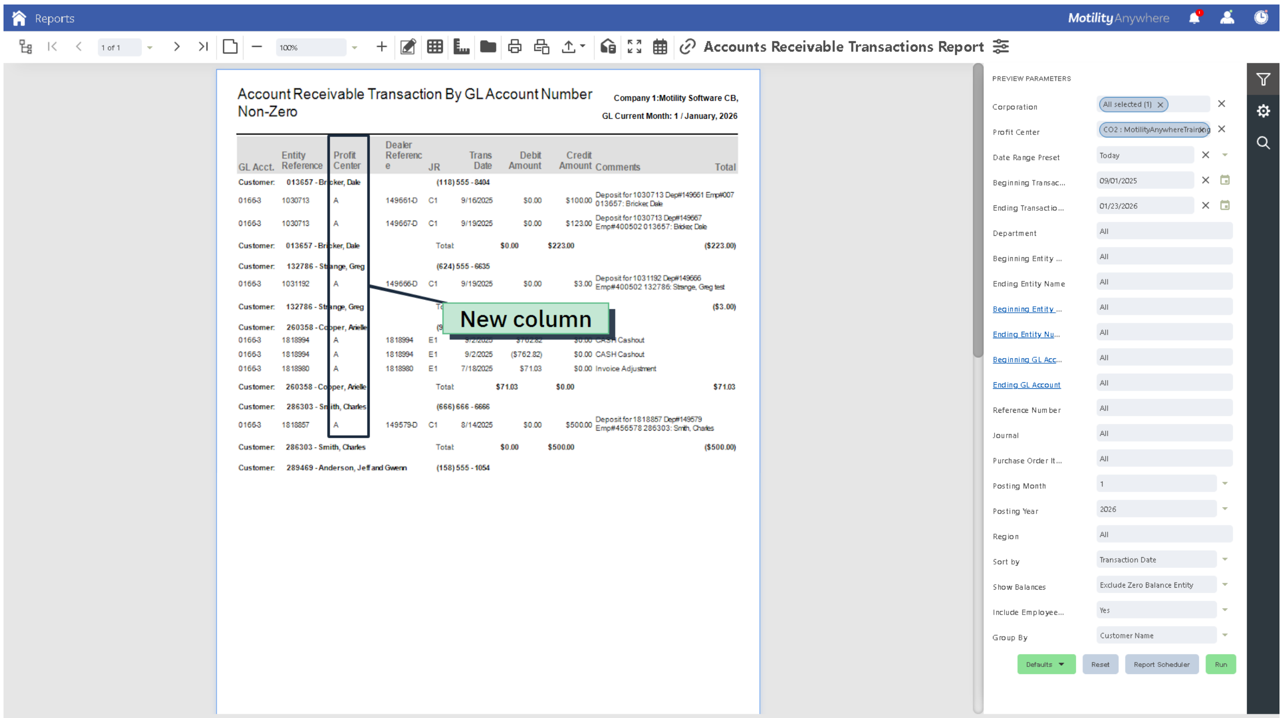
Review profit centers on the Accounts Receivable Transactions report

You can now view the profit centers for accounts receivable (AR) transactions using the Accounts Receivable Transactions report. Profit centers for AR transactions display in the new **Profit Center** column on the report.



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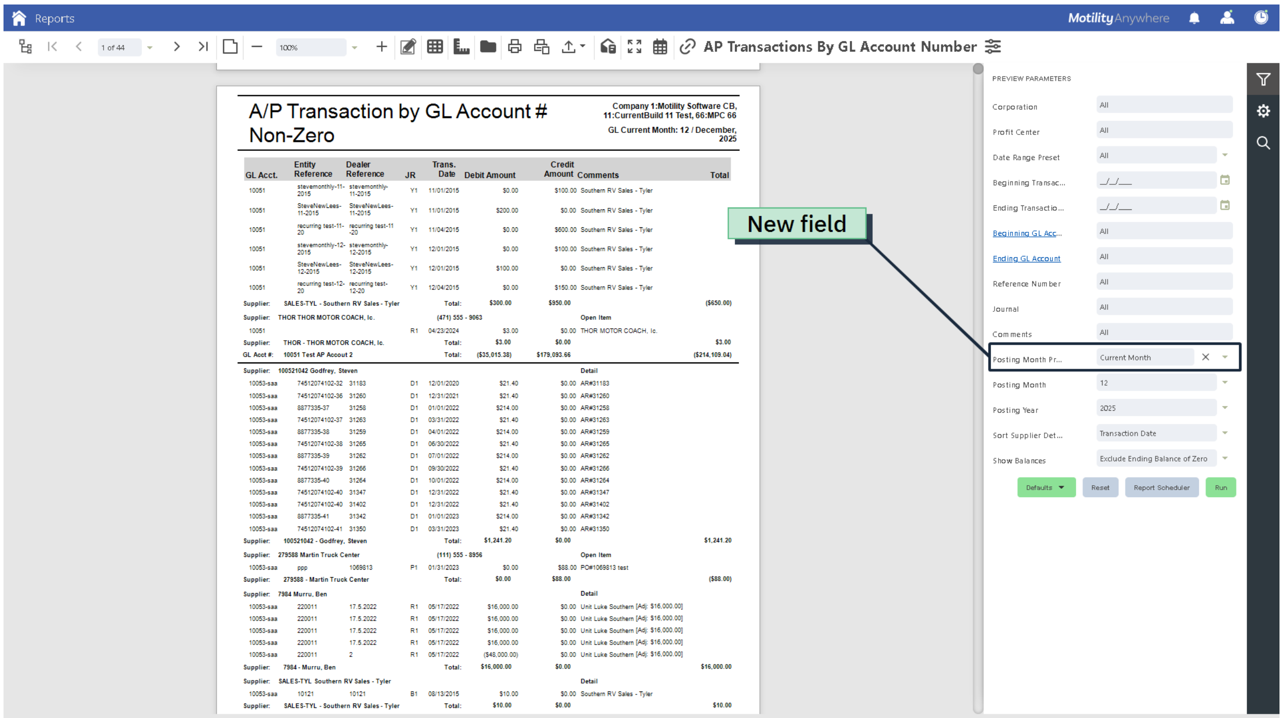
Request the AP Transactions by GL Account Number report for specific time periods

You can now more easily request the AP Transactions by GL Account Number report for specific time frames. When requesting the AP Transactions by GL Account Number report, you can now define a specific time period for the posting dates, such as the current month or most recent quarter, of transactions to include on the report.



To choose a date range for the transaction posting dates, simply select a time frame in the **Posting Month Preset** field. **Current Month** is automatically entered in this field, but can be changed. When a scheduled report is requested, records matching the entered period are included on the report, reducing the need to manually adjust the dates each month.

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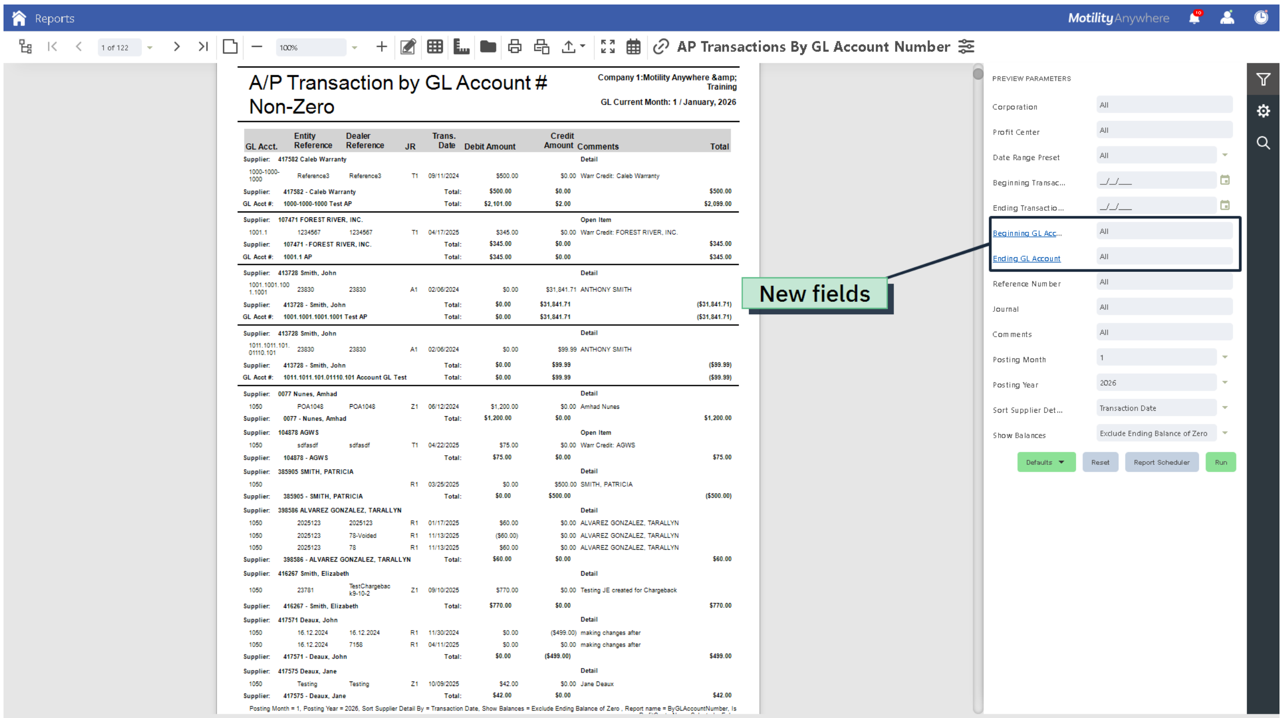
Accounting

Request the AP Transactions by GL Account Number report by GL account

The AP Transactions by GL Account Number report can now be requested for specific general ledger (GL) accounts, which is especially helpful when searching for transactions using GL account ranges.



To request the report for a range of GL accounts, enter the first GL account in the range of accounts in the new **Beginning GL Account** field and the last GL account in the new **Ending GL Account** field. If the **Ending GL Account** field is blank, the range includes all GL accounts through the last account in the Accounting module. Enter additional criteria and then click the **Run** button to request the report. Transactions from the selected GL accounts display on the report.

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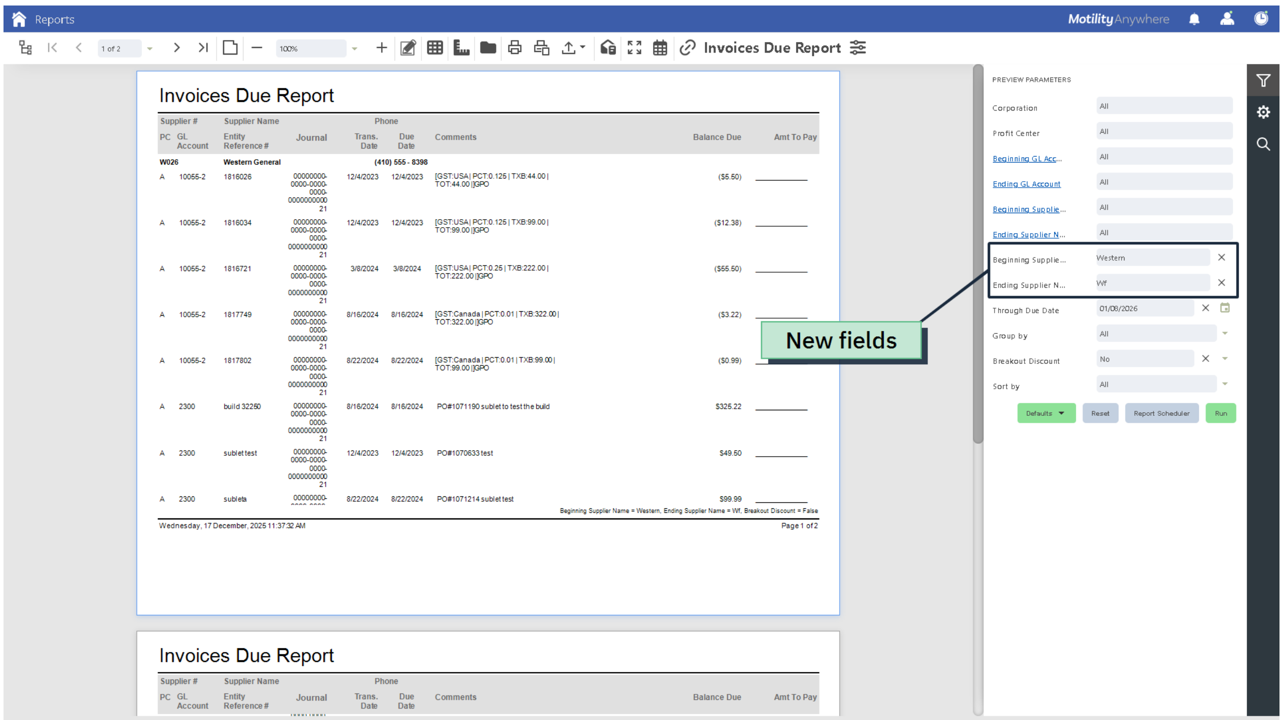
Request the Invoices Due report by supplier name

The Invoices Due report can now be requested for specific supplier names, which can be especially helpful if you organize or search for invoices using supplier names rather than supplier numbers.



To request the report by supplier name, enter the first supplier name in a range of suppliers in the **Beginning Supplier Name** field and enter the last supplier name in the **Ending Supplier Name** field. To display supplier names starting with the supplier in the **Beginning Supplier Name** field and continuing alphabetically to the last supplier name on file, leave the **Ending Supplier Name** field blank. Enter additional criteria, and then click the **Run** button to request the report. The report displays invoices due sorted by supplier name.

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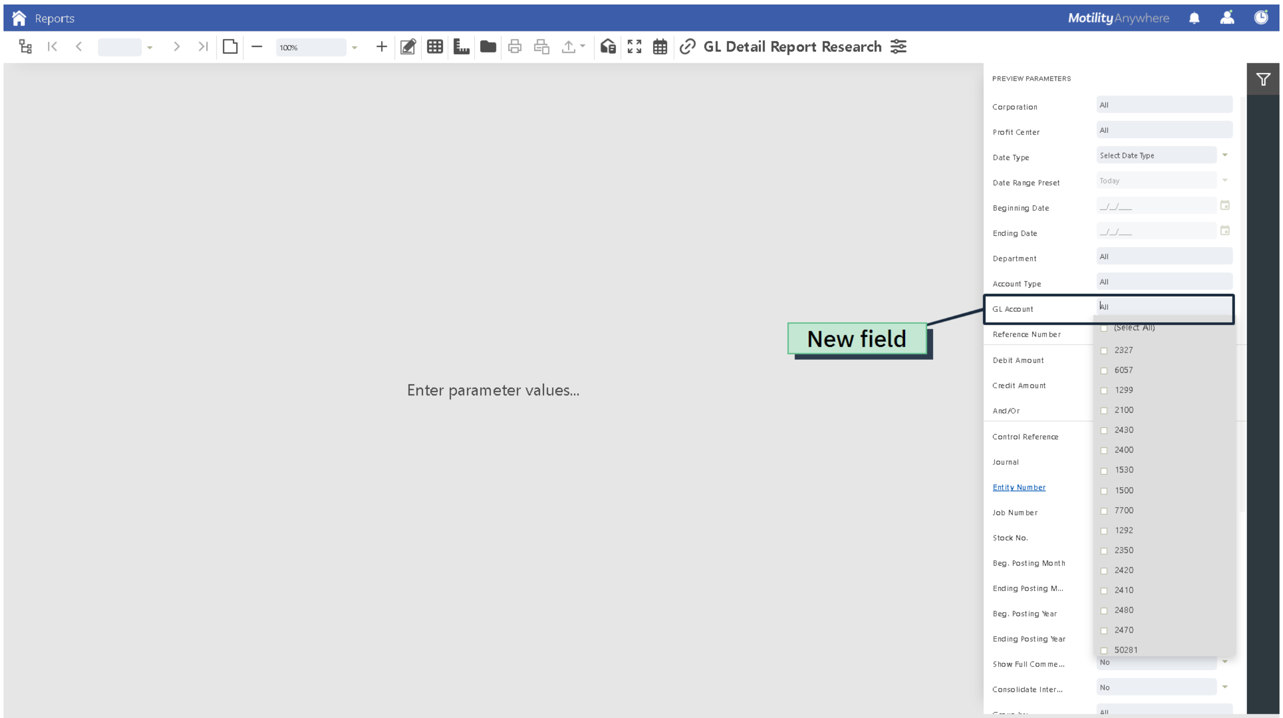
Include specific GL accounts on the GL Detail Report Research report

When reviewing transactions for general ledger (GL) accounts using the GL Detail Report Research report in the Reports module, you can now define specific GL accounts, rather than a range of accounts, to include on the report. To include GL accounts on the report, simply click in the **GL Account** field and select the check boxes for the accounts.



Enter additional report criteria and click the **Run** button to request the report. Transactions for the selected GL accounts display on the report.

Additional information

- The **Beginning GL Account** field and the **Ending GL Account** field are no longer available.

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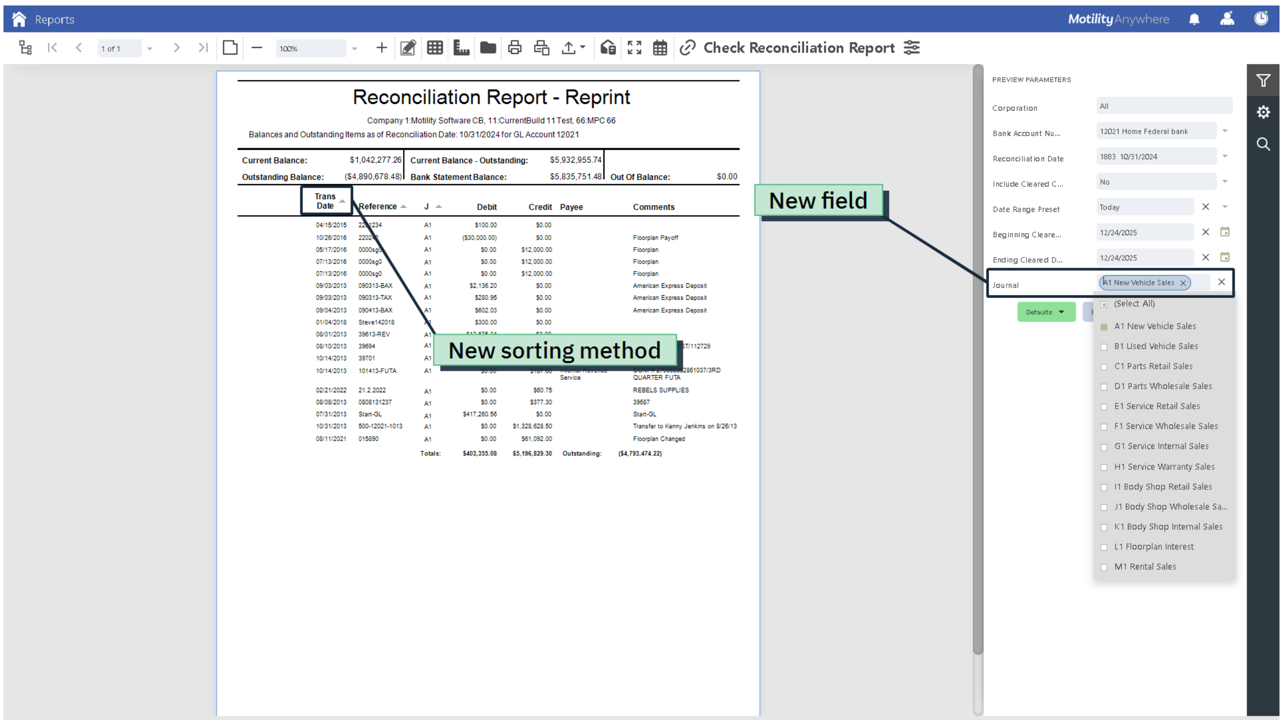
Review transactions by journal and date using the Check Reconciliation report

Using new enhancements on the Check Reconciliation report, you can sort and review transactions related to specific journals or dates more easily. By requesting this report for a specific journal, you can review activity for a particular account. Similarly, by sorting transactions by transaction date, you can match records during check reconciliation more easily.



To select which journals to include on the report, simply click the new **Journal** field to display a list of available journals. Then select the check boxes for the journals to include on the report.

In addition, you can now sort the report results by transaction date directly on the report. To sort by transaction date, click the **Trans Date** column header. The results are sorted in descending order. Click the column header again to sort the results in ascending order.

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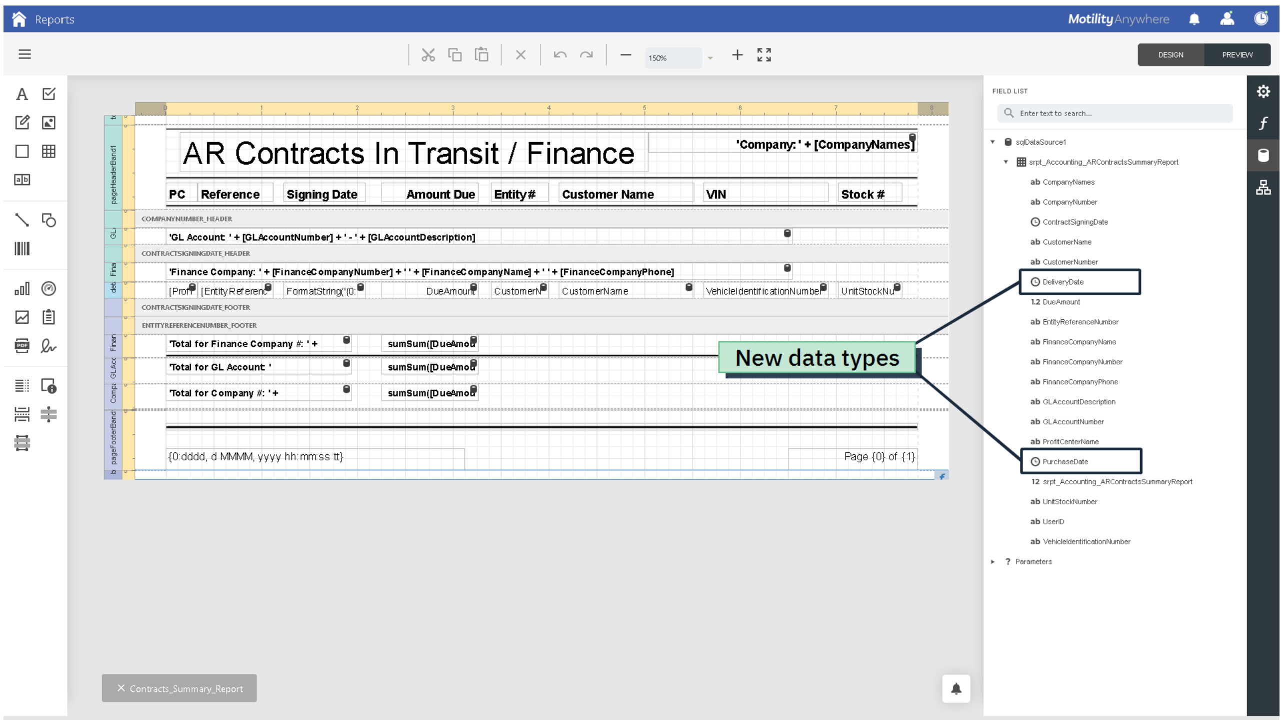
Review delivery and purchase dates on the Contracts Summary report

The Contracts Summary report can now be customized to include delivery dates and purchase dates, which can help you identify outstanding accounts receivable (AR) contracts using new data types on the Designer screen.



To display a new data type on the report, simply drag the new **DeliveryDate** data type or the new **PurchaseDate** data type to a field or column on the report, as normal.

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Miscellaneous Accounting enhancement

- When reconciling bank accounts in the Accounting module, you can now review a larger list of transactions on the GL Check Register window. The unlabeled Transactions section now displays more account information at once, helping you verify account balances and reducing the need to scroll.

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CRM

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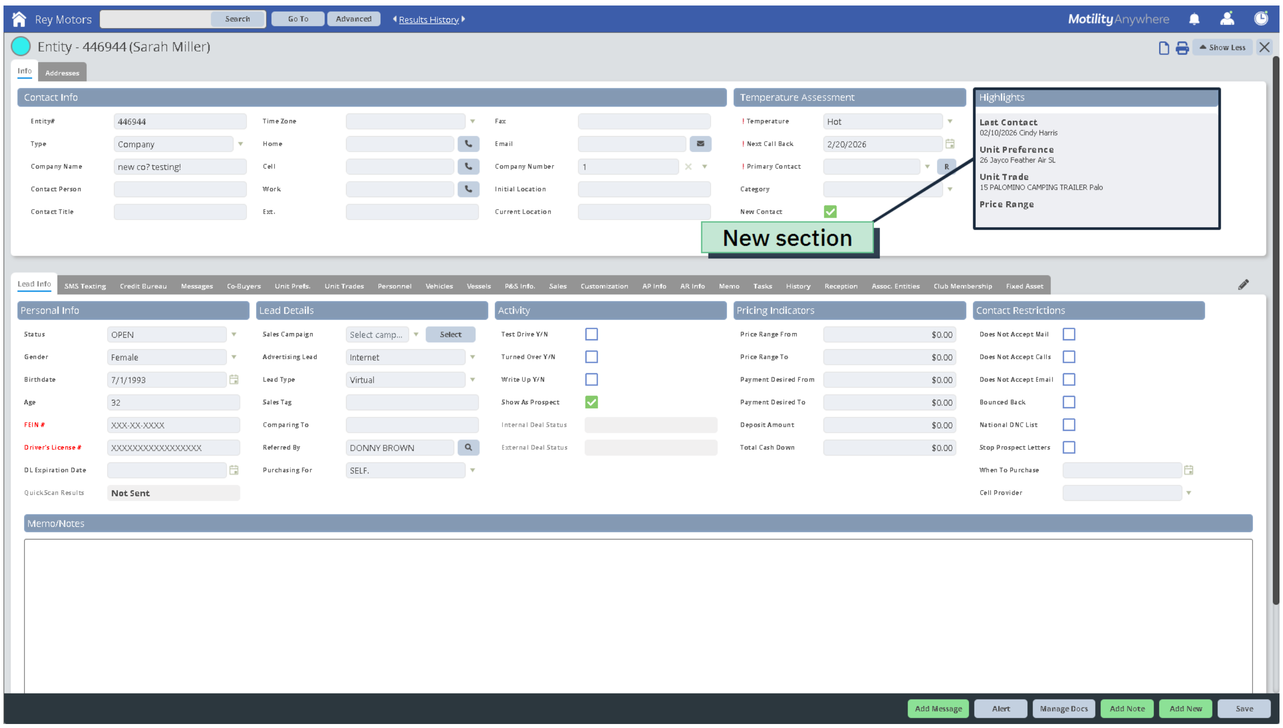
Review essential customer details

You can now review key details for a customer at a glance using a new section on an entity record. The new Highlights section is available on the Entity window and displays key details, including last contact date, unit preferences, and price range of the desired unit for the selected entity record. Additionally, the Highlights section includes details for the customer's current trade-in offer.



The following new fields display in the Highlights section.

- **Last Contact.** This field displays the date the customer was last contacted by a salesperson.
- **Unit Preference.** This field displays the preferred unit for the customer.
- **Unit Trade.** This field displays the unit the customer has offered as a trade-in vehicle.
- **Price Range.** This field displays the preferred price range of the desired unit for the customer.

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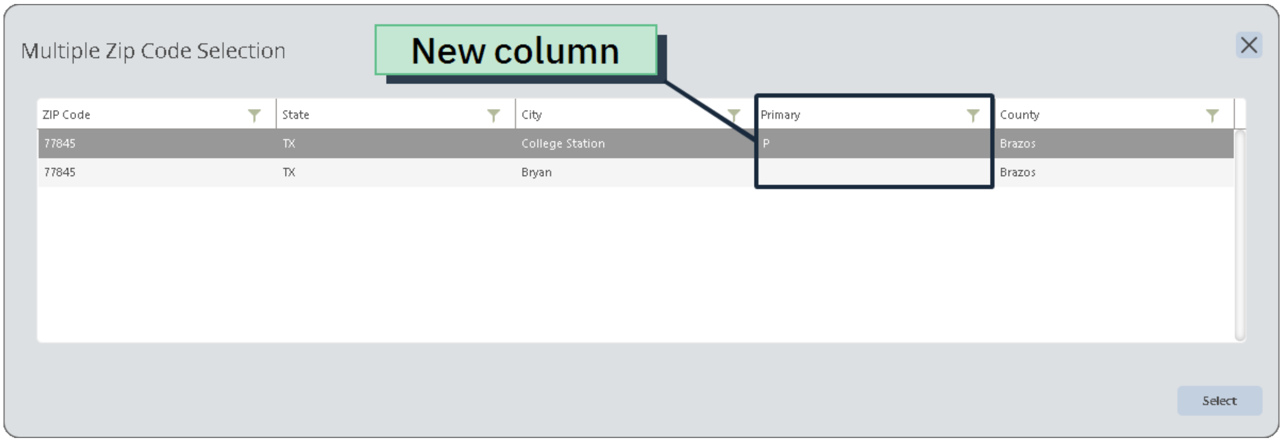
Select primary city from ZIP code

When entering a ZIP code associated with multiple cities, you can now clearly identify the primary city for the ZIP code using a new column on the Multiple Zip Code Selection window. In addition, the primary city now displays as the first option on this window.



When the Multiple Zip Code Selection window displays, the primary city is now automatically highlighted and displays at the top of the list. In addition, **P** displays in the new **Primary** column for the primary city. To select the primary city, simply press the ENTER key or click the **Select** button. The Multiple Zip Code Selection window closes, and the city, county, and state are automatically entered in the corresponding fields on the Entity window, as normal.

Additional information

- Unincorporated cities without names have been removed from the cities associated with ZIP codes.

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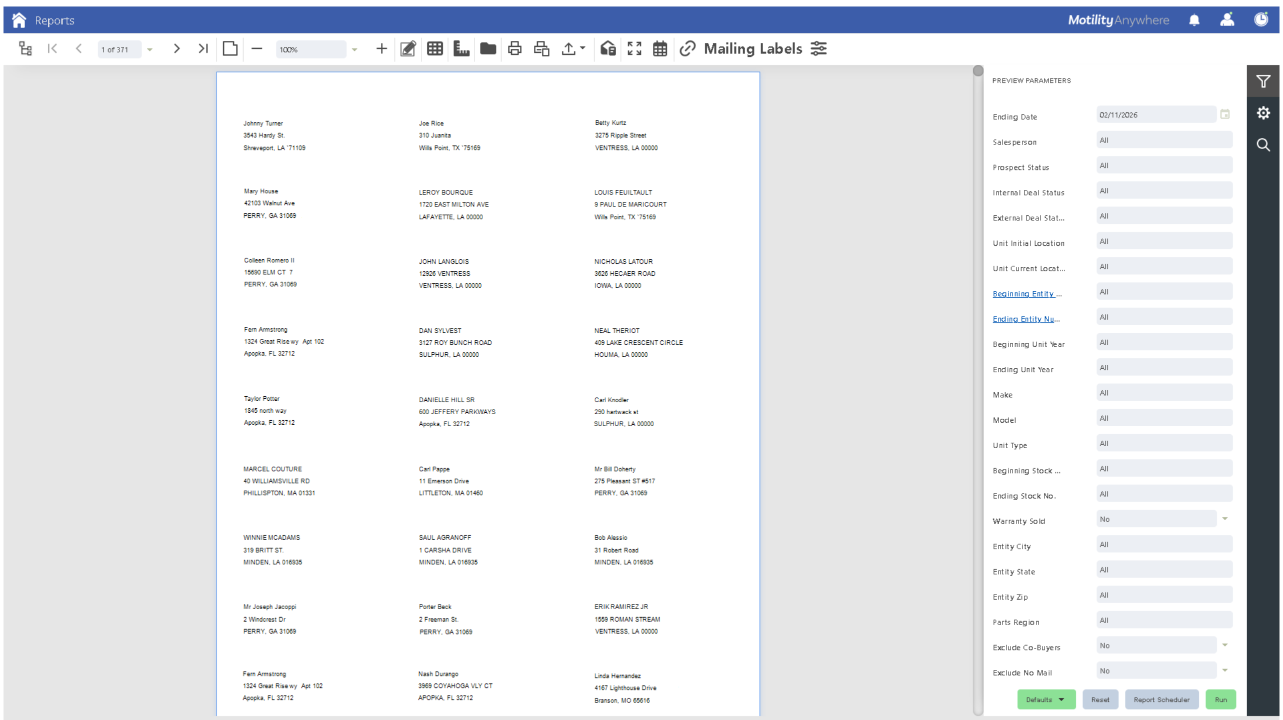
Create mailing labels with the new Mailing Labels report

Mailing labels can now be created using the new Mailing Labels report in the Reports module. The Mailing Labels report can be used to create formatted address labels for the contacts selected in the Parameters section, which can help you prepare physical mail more efficiently. Previously, mailing labels could be created using a custom report.

To access the new report, use the following menu path: CRM Reports → Misc CRM Reports → Mailing Labels.



To request the Mailing Labels report, select criteria in the Parameters section and then click the **Run** button. Labels display with the name and physical address of the recipient. The Mailing Labels report creates address labels for 27 recipients, with three columns and nine rows. To change the number of rows that display on a page, adjust the report using the Designer screen, as normal.

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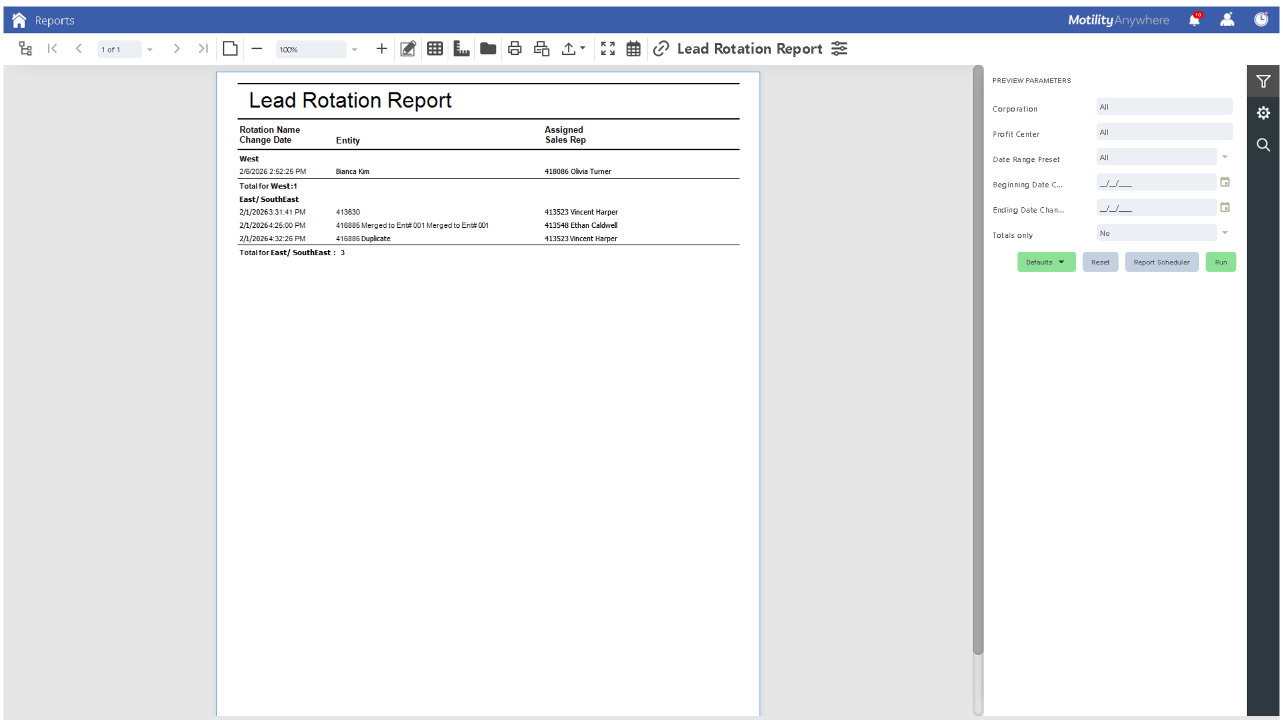
Review lead assignments using the new Lead Rotation report

Managers can use the new Lead Rotation report to review lead distribution and team assignments. Using this new report, you can easily view rotation names, changes to each rotation, assigned sales representatives, and profit centers. In addition, you can also track the total number of sales representatives in each rotation to help you monitor and manage your team's lead assignments more effectively.

To access the Lead Rotation report, select CRM Reports → Prospect Reports → Lead Rotation Report.



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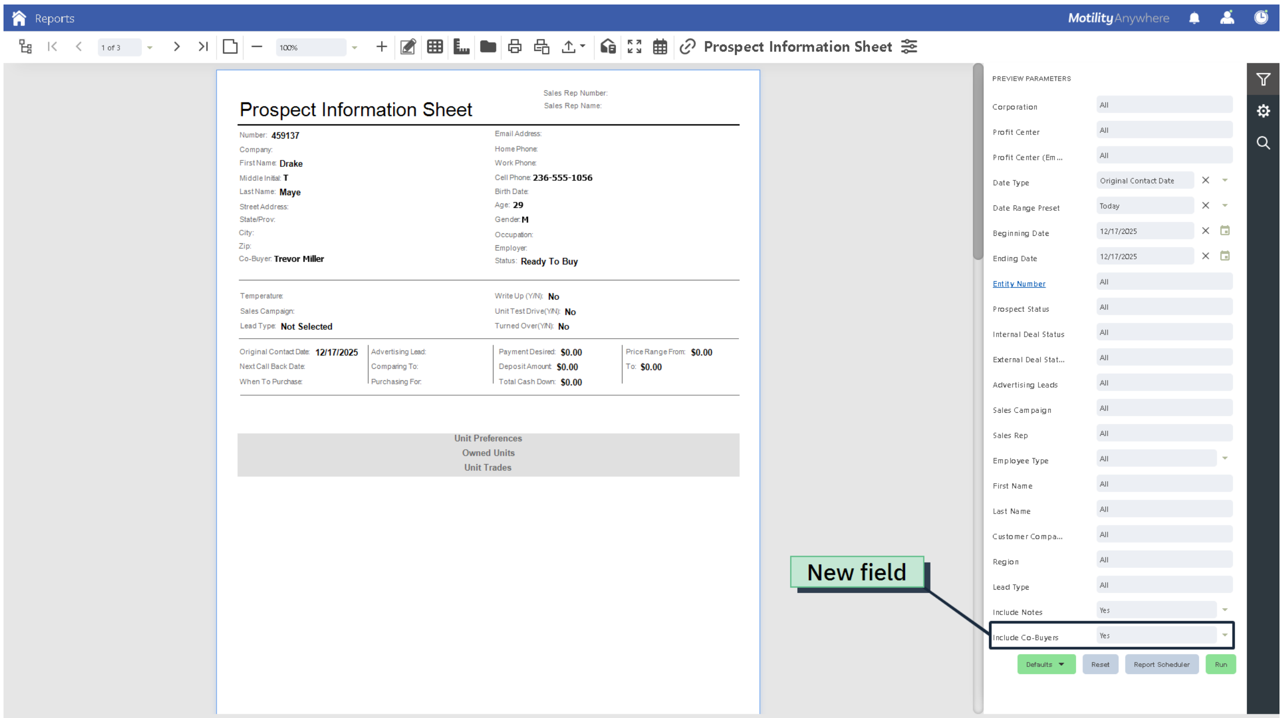
Review co-buyer information using Prospect Sheet reports

Co-buyer information is now available on the Prospect Information Sheet report and the Prospect Listing - Simplified report. When requesting either report, select **Yes** in the new **Include Co-Buyers** field to include co-buyer details, such as name and entity or customer number.



On the Prospect Information Sheet report, co-buyer details display in the **Co-Buyer** field. Alternatively, on the Prospect Listing - Simplified report, co-buyers display in the same row as the associated buyer.

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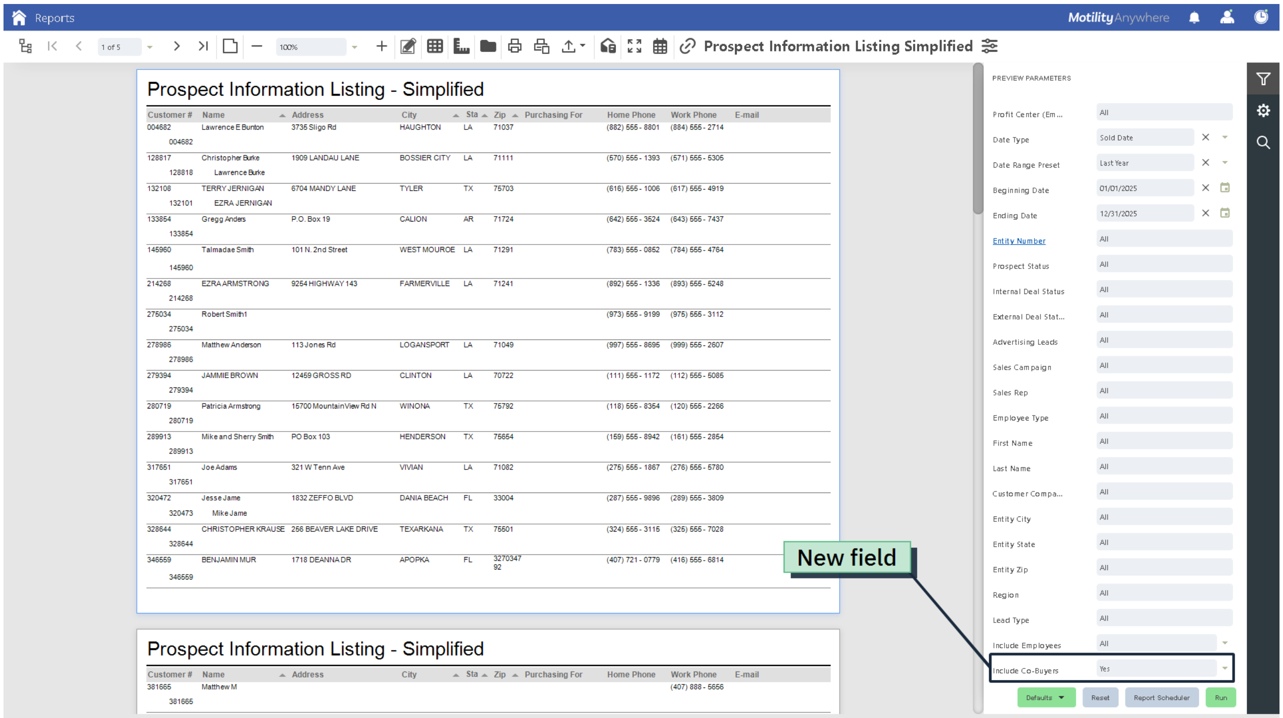

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