# Release Notes

Enhancements to MotilityAnywhere

**Preliminary**
**v.4.5.20261.10410**

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# MotilityAnywhere Release Notes

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## Business Office Enhancements

# General Program Enhancements

# General System

# Miscellaneous General System enhancement

- When using the Dark display theme, unavailable fields with a gray background now display in black text so you can better identify fields that cannot be edited.

  *Note - The Gray display theme is no longer available.*

# Reports

# Report enhancements

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

## Security Management

- Employee Listing report. For more information, refer to page 10.

## Parts & Service

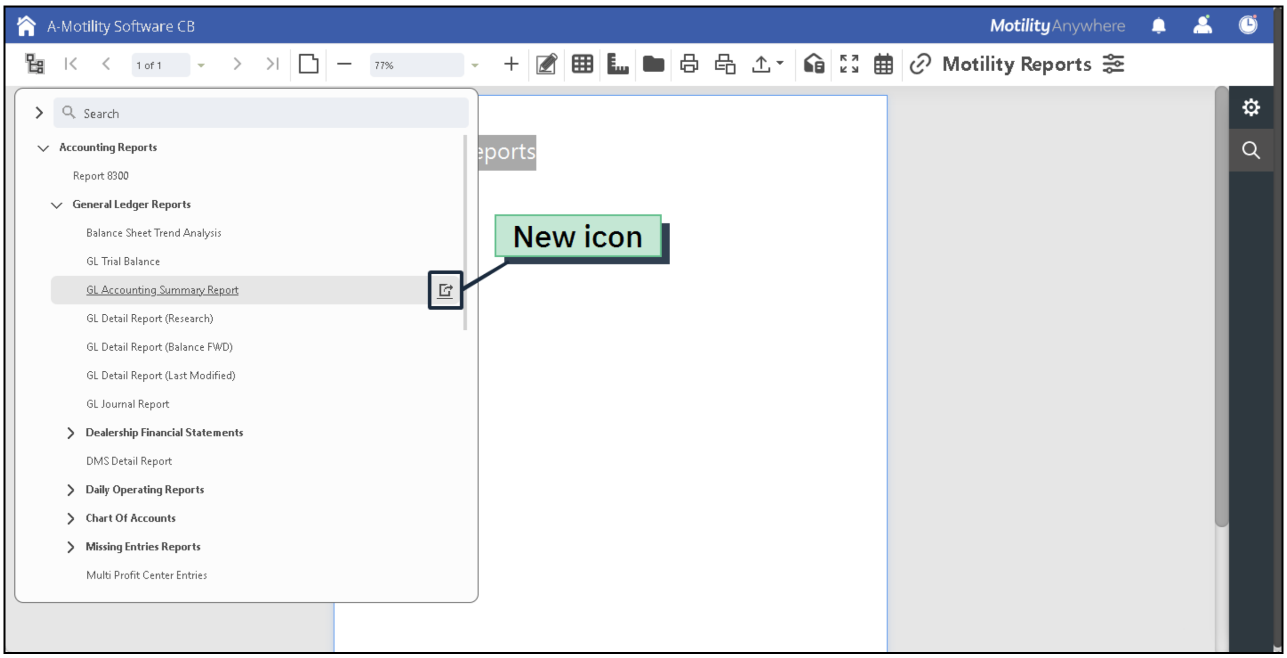
- Barcode Parts Brand Sheet report. For more information, refer to page 30.

## Accounting

- Audit reports. For more information, refer to page 33.
- Balance Sheet report. For more information, refer to page 35.

# Display a report in a separate Internet browser tab

You now have increased flexibility to display a report on a separate Internet browser tab, which can be especially useful when you want to request multiple reports consecutively. To display a report on a separate tab, hover the mouse cursor over a report name to display the new (External Link) icon. Then simply click the (External Link) icon to display the report on a new tab, where the report can be requested as normal.



# Dynamic sorting available for all columns on several reports

Multiple reports have been enhanced to allow you to utilize dynamic sorting for all columns on the reports. Previously, only specific columns on the reports could be used for dynamic sorting. With this enhancement, you have increased flexibility to organize the report information in your preferred format.

The following reports have been updated for this enhancement:

- Accounts Payable Checks Remittance
- AP Supplier Listing
- AR Customer Listing
- Check Reconciliation
- Customer Information
- Deals Sold Report Grouped by Finance Company Zip Code State
- Finance Back End Business Managers Report V2
- Sales Profit Overview

To use dynamic sorting for a column on the report, simply click the column heading on the report, as normal.

# Security Management

# New security permission

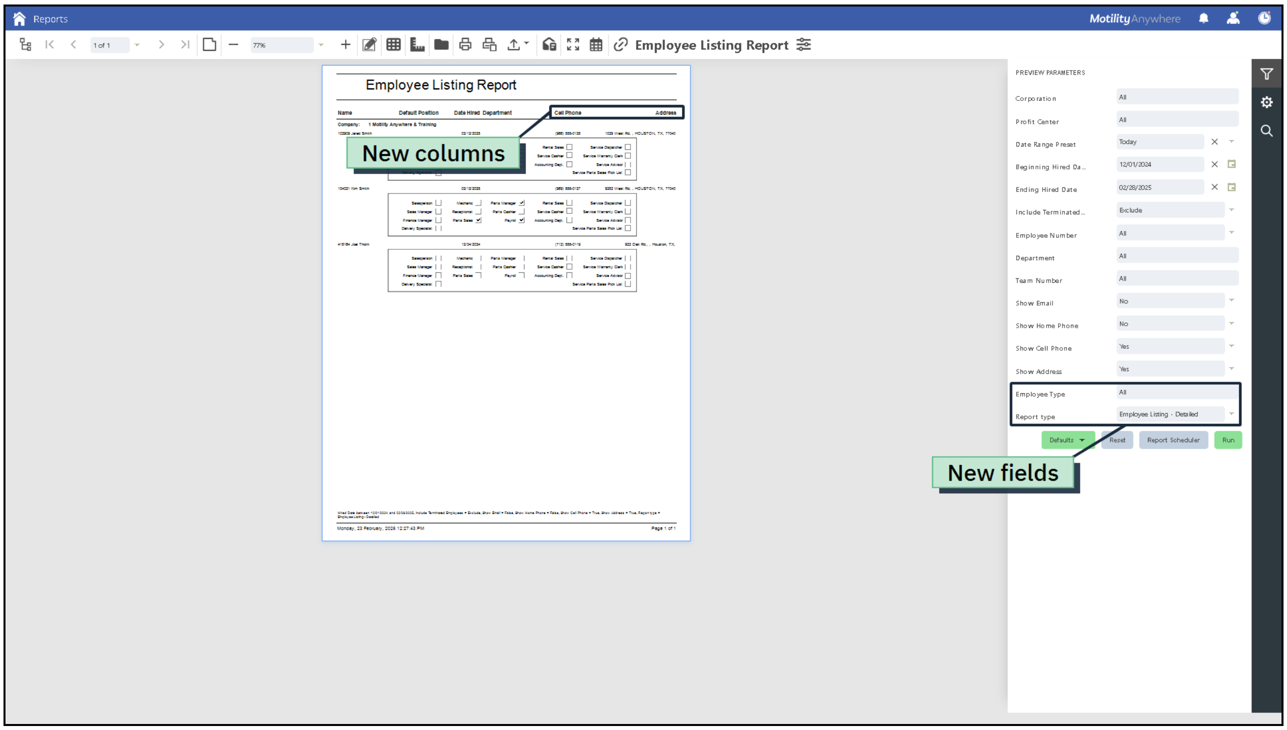
The following security permission has been added on the Permissions window in Security Management. For more information about the enhancement related to a security permission, refer to the corresponding topic.

## Deal Desking

- Settings → Security Management → Properties → Permissions → **[View Tab:] Finance_ Profit**. For more information, refer to page 14.

# Review additional employee details on the Employee Listing report

You can now define the Employee Listing report to include the cell phone number and address for each employee. To include this information on the Employee Listing report, simply select **Yes** in the new **Show Cell Phone** field and the new **Show Address** field in the Preview Parameters section.




When the report is requested, the employees' cell phone numbers and addresses display in the new **Cell Phone** and **Address** columns.

# Miscellaneous Security Management enhancement

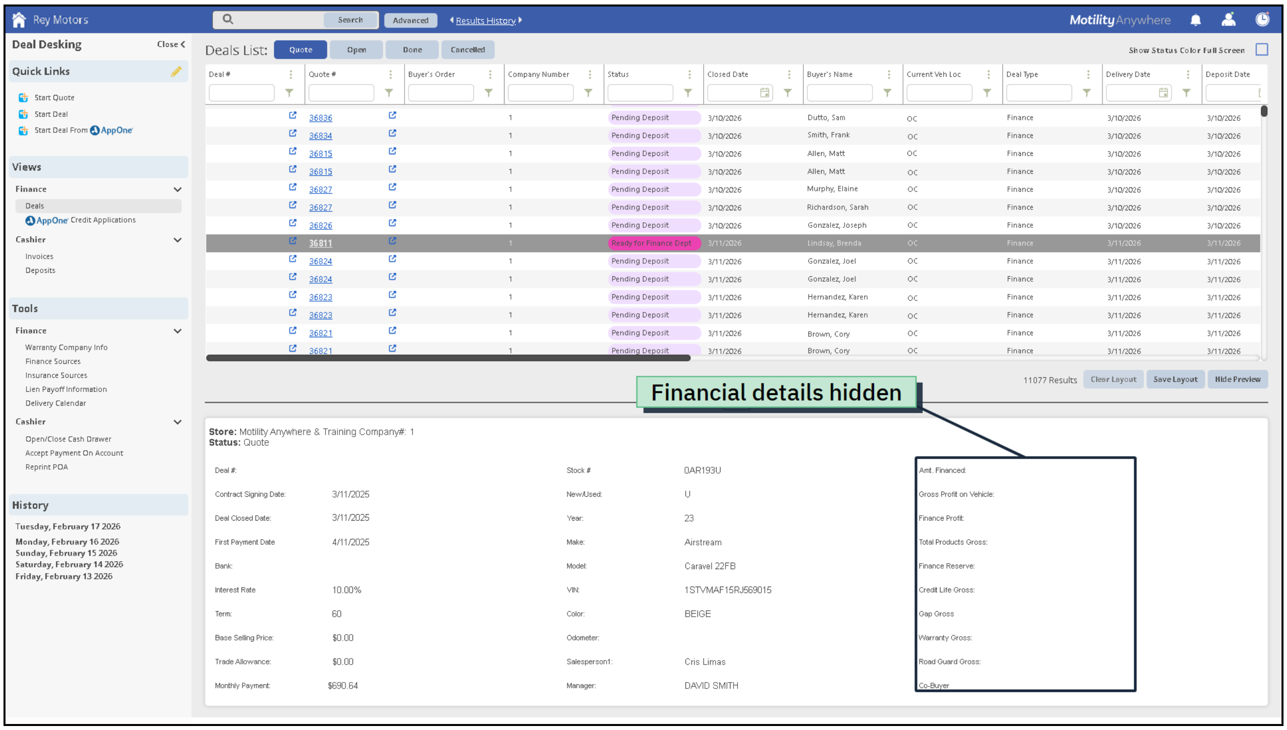
- You can now hide sensitive financial deal details from salespeople using an updated security permission in Security Management. To restrict a salesperson's access to viewing financial deal details, simply select the Settings → Security Management → Properties → Permissions → **[View Tab:] Finance_Profit**. For more information, refer to page 14.

# Front-End Enhancements

# Deal Desking

# Restrict sales personnel from viewing financial details on a deal

You can now hide sensitive financial details from salespeople in the Deal Preview section on the Deals List screen. To restrict a salesperson from viewing deal profile information, such as gross profit amounts, on the Deals List screen, simply select the existing **[View Tab:] Finance_ Profit** check box on the User Properties window in Security Management.




*Note - The **[View Tab:] Finance_Profit** permission is still used to restrict access to viewing the F Profit tab on the Deal window, as normal.*

# Unit Inventory

# Miscellaneous Unit Inventory enhancement

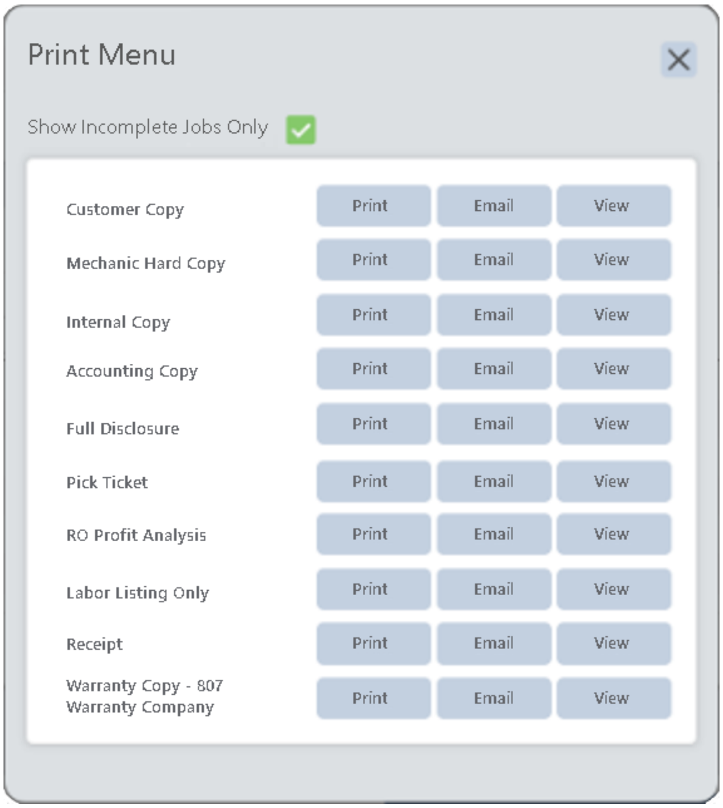
- When reviewing units using a filter in the Custom View section on the Unit Inventory Available Units List screen, you can now preview details for a unit using a familiar process. When a filter is applied, the **Show Preview** button, previously only available if no filter was applied, is now available. Simply highlight a row for a unit and click the **Show Preview** button to display details for the unit in the Unit Details section, as normal. To hide the Unit Details section for the unit, click the **Hide Preview** button.

# Fixed Operations Enhancements

# Parts & Service

# Simplified process for printing, sending, and reviewing service documents

Using the new Print Menu window, you can now easily print invoices and related service documents, send documents as attachments to Email messages, and preview documents with a streamlined process. With this window, you can select from various actions to perform for a document in a central location, allowing you to complete the tasks using fewer keystrokes.

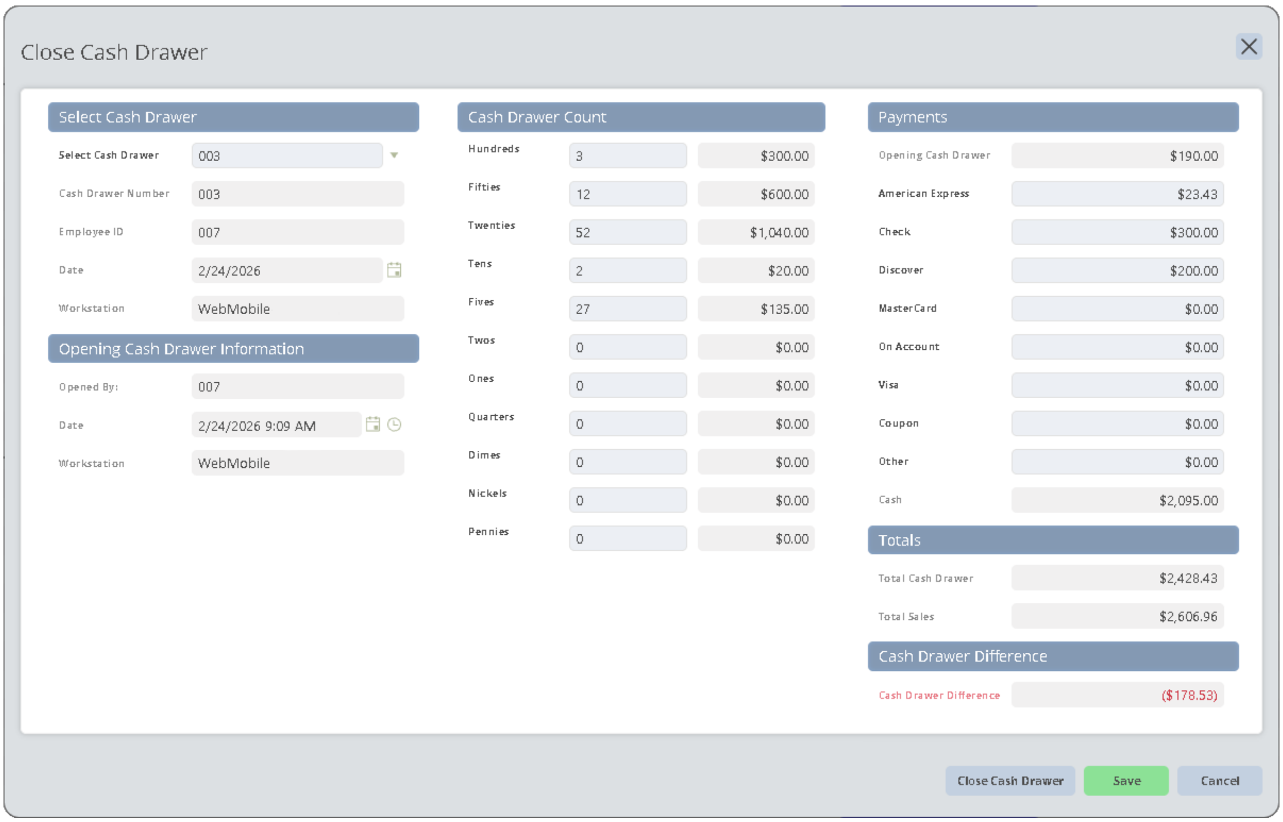



To access the Print Menu window, simply click the **Print** button on an invoice. The Print Menu window displays with the documents related to the invoice listed. Use the following buttons on the window to perform actions for the documents.

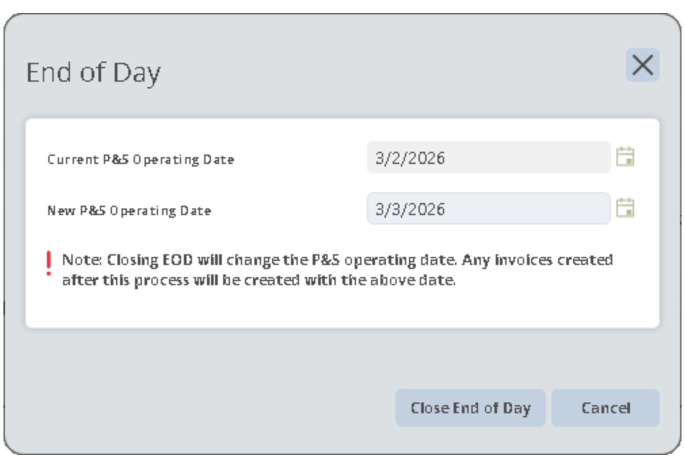
- **Print**: Click this button to display the document on the Print Preview window, where a copy of the document can be printed.
- **Email**: Click this button to create a new Email message on the New Message window with the document automatically added as an attachment.
- **View**: Click this button to display the document in the Reports module, where the document can be reviewed.

# Updated windows for processing daily closeouts

The Close Cash Drawer window and the End of Day window have been redesigned to help you process daily closeouts more easily. The Close Cash Drawer window has been resized to allow more information to display without scrolling, and key fields are now highlighted for easy identification. For example, if there is a difference between the cash drawer and the cash drawer count, the **Cash Drawer Difference** field displays in red text to help you identify discrepancies quickly.



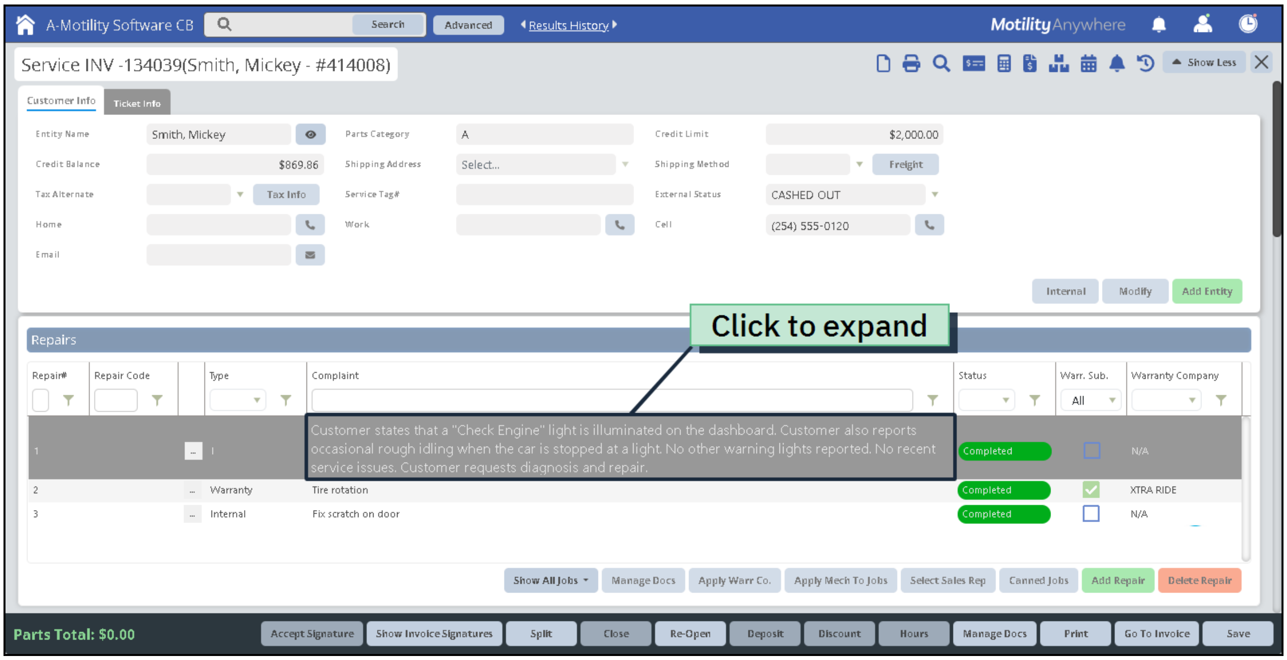

The End of Day window has also been resized and updated to highlight important information.



The warning that displays on the window is now bolded for improved visibility. In addition, the ❗ (Notice) icon now displays with the warning.

# Review full descriptions of complaints

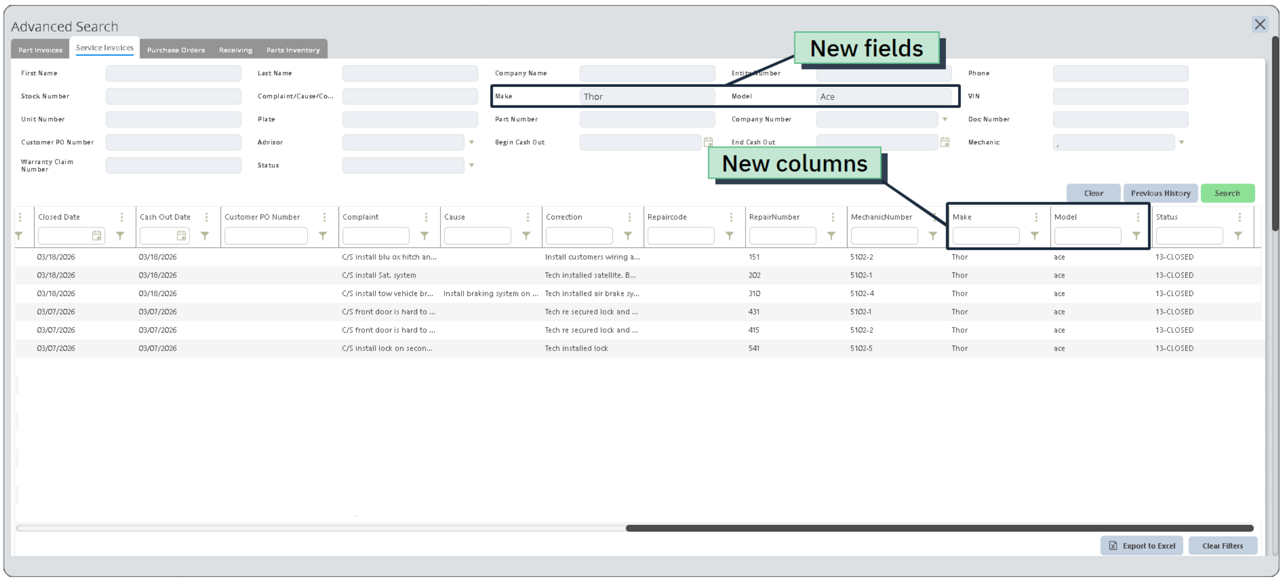
When reviewing closed invoices on the Parts Invoice window and the Service Invoice window, you can now view the full description of a complaint in the updated **Complaint** field. To view additional details for the complaint, simply click the **Complaint** field to expand the field and display the full complaint.




To view fewer details for the complaint, click the **Complaint** field again.

# Search for invoices using new criteria

You can now search for specific invoices by make and model using the Advanced Search window. To search by make, simply enter the make in the new **Make** field on the Service Invoices tab. Similarly, to search by model, enter the model in the new **Model** field.

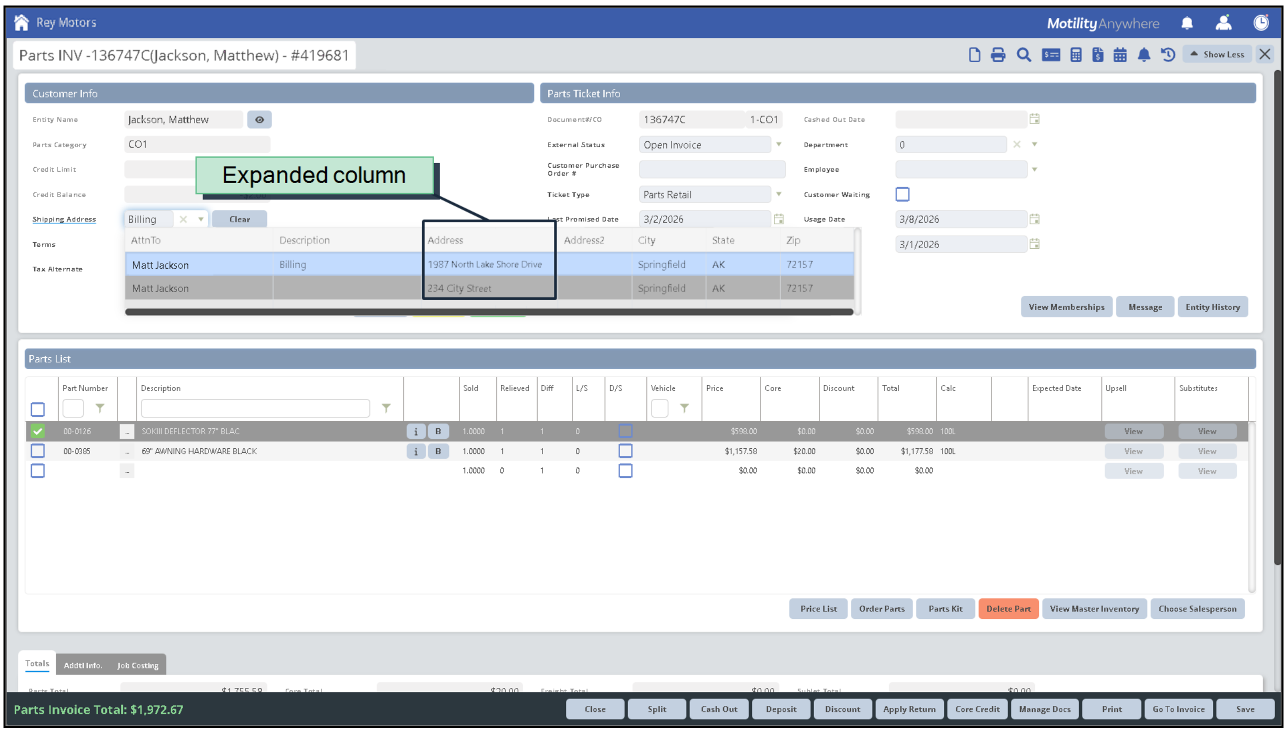



Enter additional search criteria and click the **Search** button, as normal. Results matching the entered criteria display in the Results section.

*Note - The new **Make** column and the new **Model** column do not display in the Results section by default. To display the columns, click the ⋮ (Column Settings) icon and select the Columns menu option, as normal. Then select the **Make** check box and the **Model** check box.*

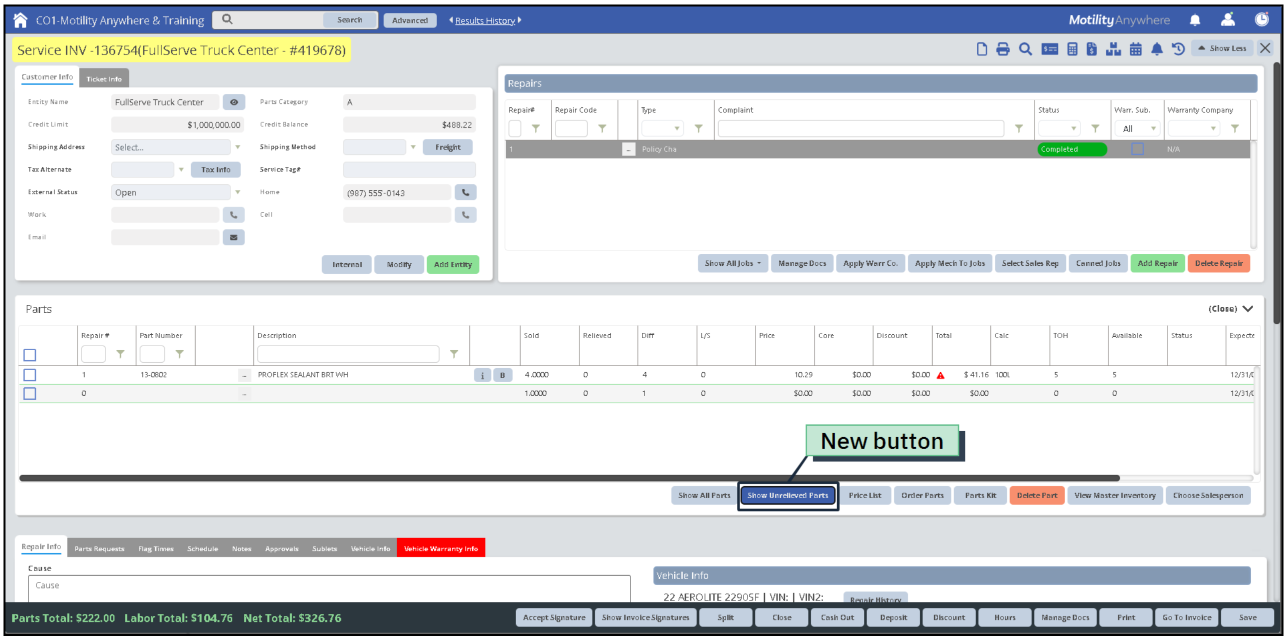
# Identify shipping addresses on invoices at a glance

When reviewing an invoice on the Parts Invoice window and the Service Invoice window, you can now more easily identify the shipping address for the invoice. On these windows, the full address now displays in the **Address** column in the list of available entries for the **Shipping Address** field, which is especially helpful when selecting the appropriate address for an entity with multiple addresses.



# Quickly review unrelieved parts

When reviewing parts information on a repair order using the Service Invoice window, you can now quickly identify parts that have not been relieved from inventory. Simply click the new **Show Unrelieved Parts** button to only display parts which have not been relieved from inventory but have been sold.

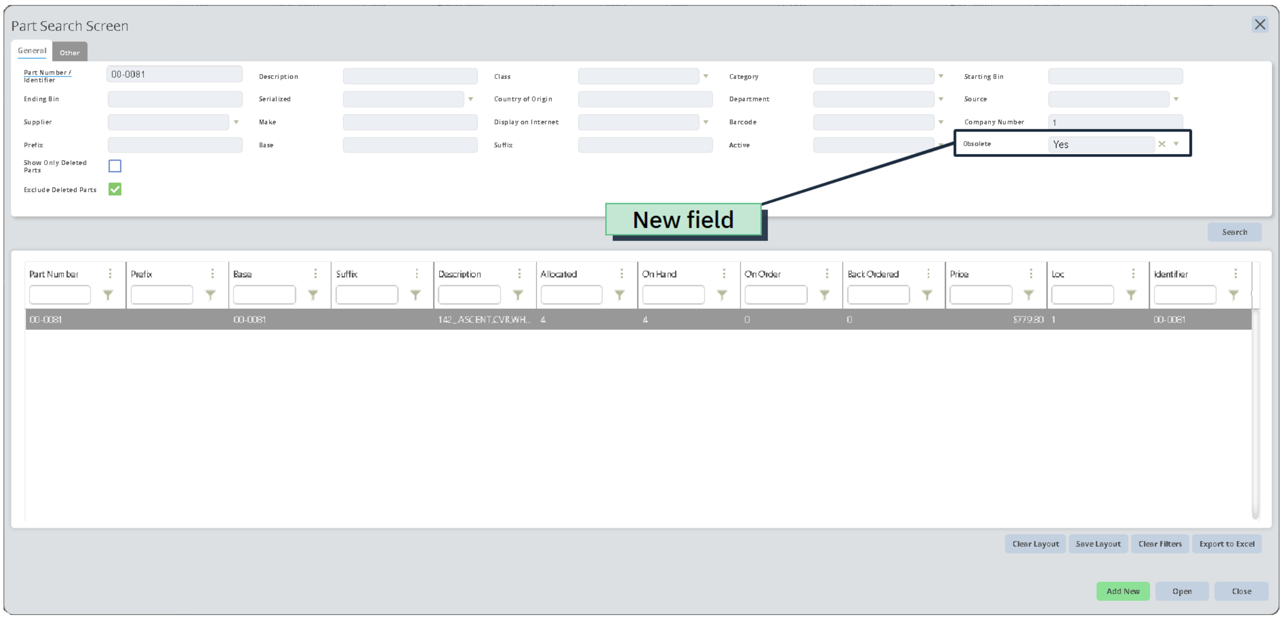



The **Show Unrelieved Parts** button can be used along with with filters in the Parts section. For example, enter **1** in the unnamed **Filter** field in the **Repair #** column and click the **Show Unrelieved Parts** button to only display unrelieved parts used in repair 1.

To display both relieved and unrelieved parts, click the **Show Unrelieved Parts** button again.

# Search for obsolete parts

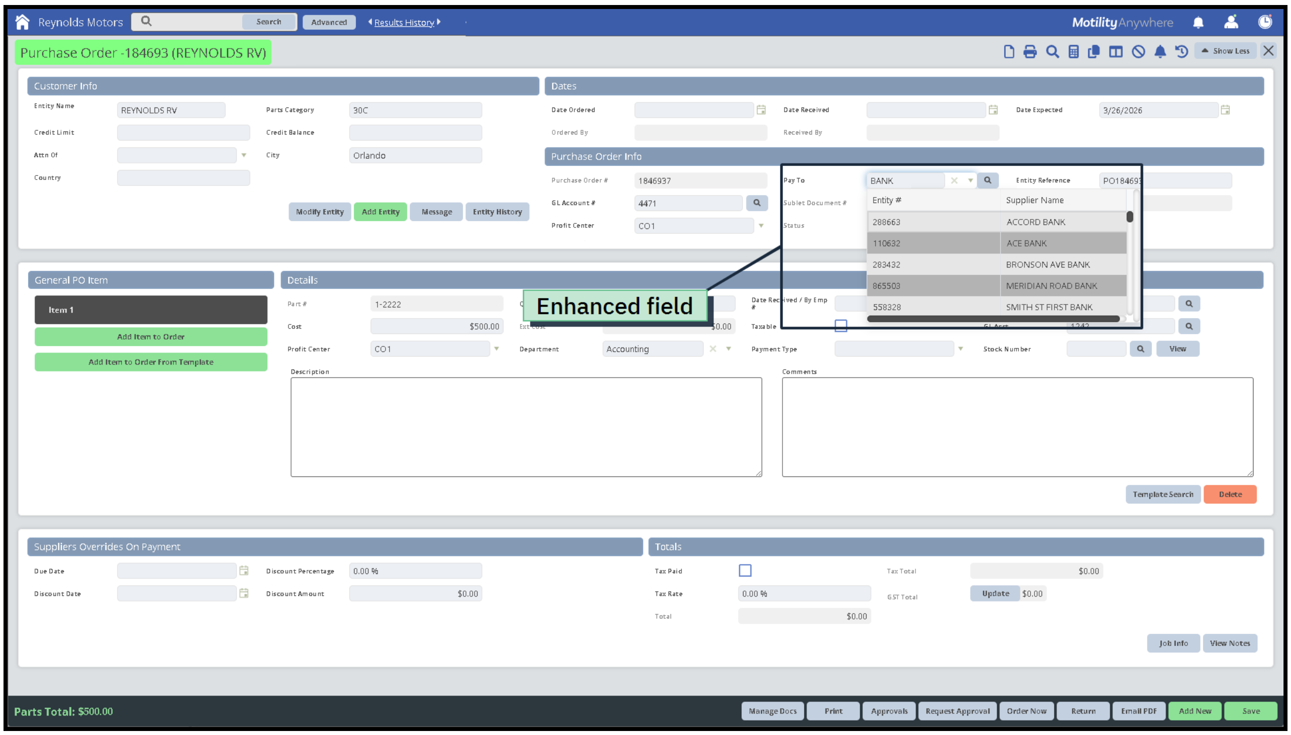
When using the Parts Search Screen window, you can now search for a part based on whether the part is obsolete. With this enhancement, you can determine whether parts in inventory are obsolete more easily than reviewing the parts record or requesting a report.




To search for obsolete parts, simply select **Yes** in the new **Obsolete** field, enter additional criteria as needed, and click the **Search** button. Parts marked as obsolete in the parts record display in the search results. Similarly, to search for parts that are not marked as obsolete, select **No** in the **Obsolete** field.

# Reference entity numbers for suppliers to pay more easily

When entering supplier information for general purchase orders, purchase orders, and receiving tickets, you can now determine the entity number for the supplier to pay using a simplified process. To quickly identify the entity number for a supplier to enter in the **Pay To** field on the Purchase Order window or the Receiving window, simply enter the partial or full name of the supplier in the **Pay To** field. As the name is entered, supplier names and the corresponding entity numbers matching the text display in a list of valid entries for the field, reducing the need to perform a search.




Simply select the supplier for the transaction from the list of valid entries to enter the entity number for the supplier in the **Pay To** field.

*Note - To search for entities that are not suppliers or to search for an entity by supplier number, click the (Search) icon, as normal.*

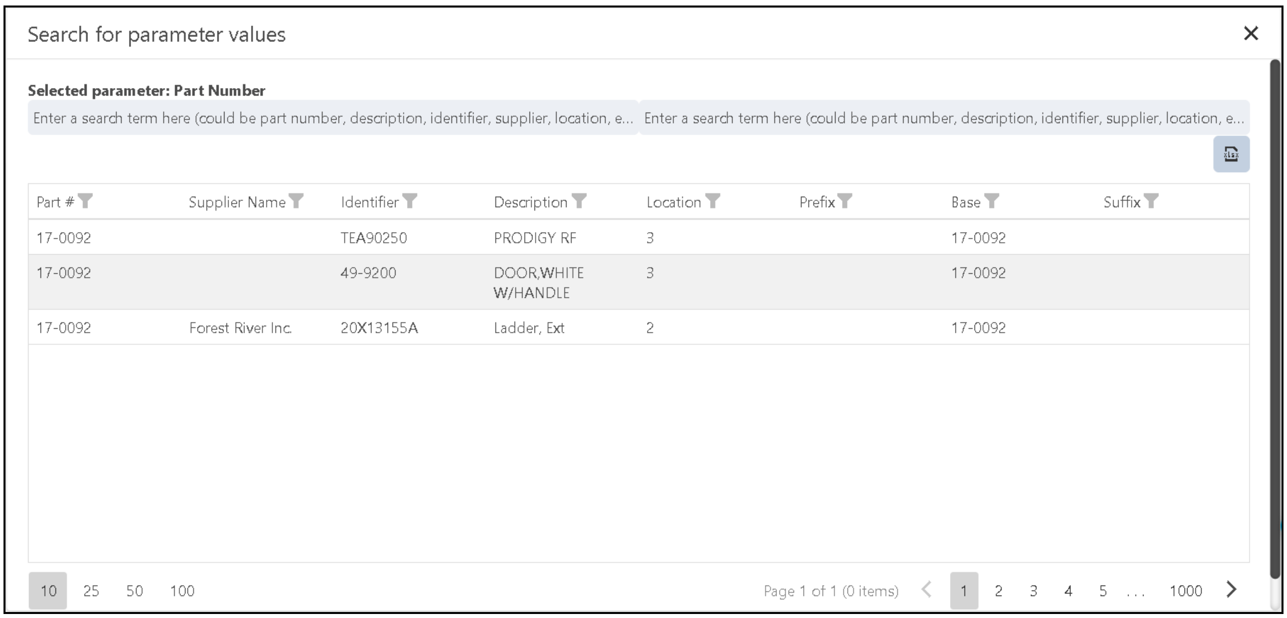
# Print bar codes for received or posted tickets

You can now print bar codes for parts on received tickets in Received status or Posted to Accounting status from the Barcode Parts Brand Sheet report. To print these bar codes, simply click the new **Print Barcodes** button on the Receiving window in the Reports module. The Preconfigured Parts Barcodes window displays, where you can review the parts entered on the Receiving window and then select which parts should display on the Barcode Parts Brand Sheet report. Click the **Show Report** button to include the bar codes for the selected parts on the report, as normal.

# Select parts with duplicate part numbers to include on reports

When defining which parts to include on the Barcode Parts Brand Sheet report or the Barcode Parts Roll Paper report, you can now easily select the specific part you need to include when multiple parts share the same part number.

When you enter a part number that is assigned to multiple parts in the **Enter the part number** field on the Add New window for the reports and click the **Accept** button, the Search for Parameter Values window now displays. On this window, a list of all parts with the entered part number displays.




Simply double-click the part to include on the report, then click the **Accept** button on the Add New window. The window closes and the part displays on the Preconfigured Parts Barcodes window, where you can request the report, as normal.

# Miscellaneous Parts & Service enhancements

- Entries in the **Entity Number** field for general purchase orders and receiving tickets are now limited to no more than 20 characters.
- Part descriptions greater than 50 characters on the Barcode Parts Brand Sheet report and the Barcode Parts Roll Paper report in the Reports module are now truncated to display on a single line of text on bar code labels to aid in proper alignment.

# Business Office Enhancements

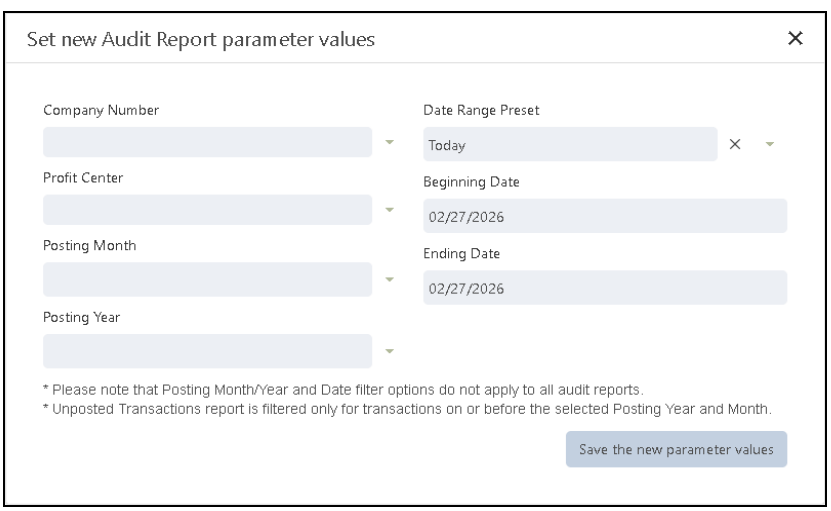
# Accounting

# Print multiple audit reports in batches

Audit reports in the Reports module can now be printed in batches, saving you time when you need to print multiple reports. To allow you to print audit reports in batches, the new Audit Reports Printing window is now available. On this window, you can easily select the specific reports to print in a batch.

To access the Audit Reports Printing window, expand the Accounting Reports section in the Report menu, and then click the *Audit Reports* link. The Audit Reports Printing window displays, where you can select the **Select to Print** check boxes for the reports to print.


To define criteria for the reports to print, click the **Parameter Values** button. The Set New Audit Report Parameter Values window displays, where you can define the company, the profit center, and the dates or date range for the report. Click the **Save the new parameter values** button to save the criteria.



Once all reports are selected and criteria is defined, click the **Show Reports** button on the Audit Reports Printing window. A preview screen displays where you can define further report criteria as needed. Click the **Run** button to request the reports, as normal. Once the reports are requested, click the (Print) icon to print the selected reports.

## Additional information

- Click the (Export all data to Excel) icon on the Audit Reports Printing window to export a .xlsx file that contains the report name, report filter, report URL, and print status.

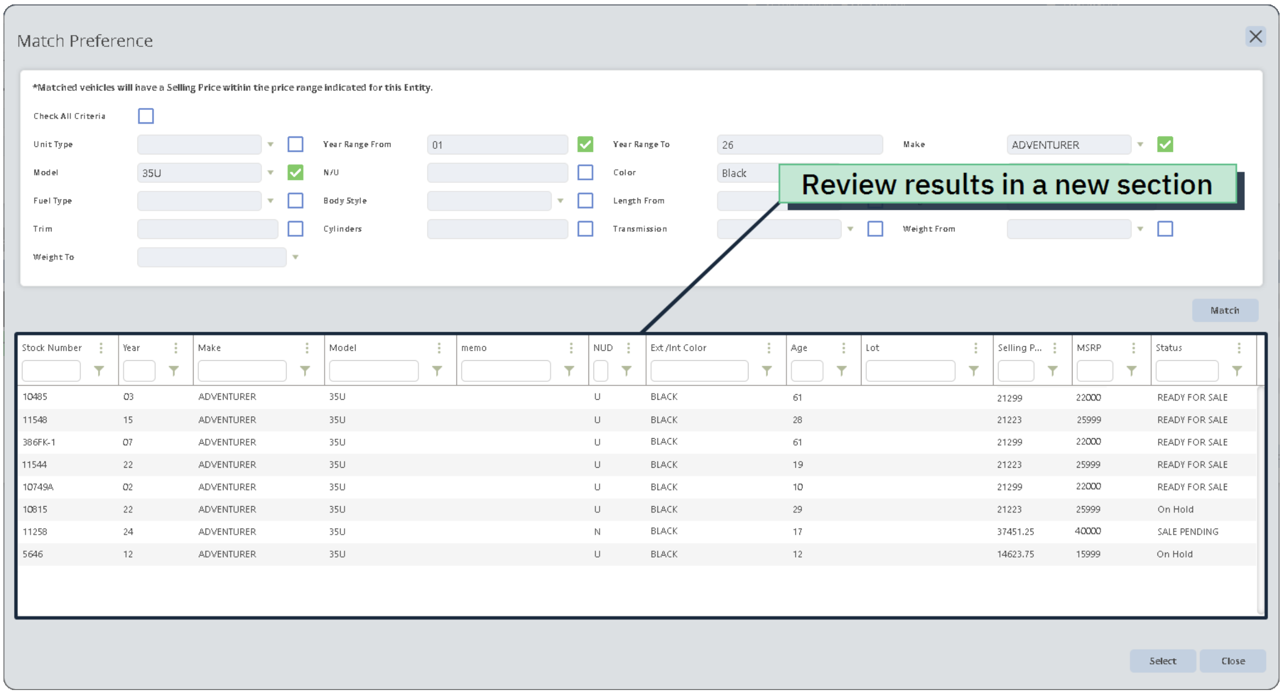
# Miscellaneous Accounting enhancement

- When requesting the Balance Sheet report, the GL Accounting Summary report, or the GL Trial Balance report in the Reports module, entries are now automatically entered in the **Posting Month** field and the **Posting Year** field based on entries defined on the Settings screen. Current dates are defined in the **GL Current Month** field and the **GL Current Year** field on the Accounting subtab on the Company Settings tab on the Settings screen.

# CRM

# Updated window for matching unit preferences

Multiple enhancements are now available for the Match Preference window to help you review and match unit preferences for a customer more effectively. The window has been reorganized to display in a more visually appealing layout, and you can now perform a search and review the matching results directly on the window.




To search for a unit, enter criteria in the unlabeled Criteria section, and then click the **Match** button. Units matching the criteria display in the unlabeled Results section directly on the Match Preference window.

To review details for a unit, simply highlight the unit in the unlabeled Results section and click the **Select** button. The Unit Inventory window displays as normal, where unit information can be reviewed and related documents can be printed.