

Motility Anywhere



Release Notes

Enhancements to MotilityAnywhere

4.5.20262.21000

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Motility Software Solutions

One Reynolds Way

Dayton, OH 45430

407.358.2000

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Table of Contents

General Program Enhancements

Messaging	2
Various enhancements for the Task window	3
Reports	4
New reports available	5
Report enhancements	6
Redesigned screen for adding logos to reports	7
Miscellaneous Reports enhancement	8
Security Management	9
New security permissions available	10
General System	11
Miscellaneous General System enhancements	12

Front-End Enhancements

Deal Desking	14
Updated windows for printing forms	15
Updated window for scheduling appointments	18
Unit Inventory	19
Identify expected delivery dates at a glance	20
Miscellaneous Unit Inventory enhancement	21
Rental	22
Updated windows for printing forms	23
CRM	26
Updated window for setting up event notifications	27
Review entity status when searching for entities	29
Miscellaneous CRM enhancements	30

Fixed Operations Enhancements

Parts & Service	32
Assign salespersons to parts or repairs on invoices	33
Assign advisors to invoices using new field location	35



Easily identify repair orders with deposits	36
Part number column added to Parts Requests screen	37
Review the full parts list on the Parts List window	38
Quickly assign salespeople to parts and repairs on an invoice	39
Restrict technicians from clocking into unapproved jobs	40
Review unposted receiving tickets using new report	41
Review invoices by item type on the Parts On Non Cashed Out Invoices report	42
Review gross inventory turns using new report	43
Miscellaneous Parts & Service enhancements	44

Business Office Enhancements

Accounting	46
Portrait page orientation available for the Invoices Due report	47
Miscellaneous Accounting enhancement	48



General Program Enhancements



Messaging



Messaging

Various enhancements for the Task window

When assigning a task using the Task window, you can now clear entries made for the entity name, stock number, and new lot location with a single click. In addition, buttons on the window have been renamed and reorganized to help you access entity and unit details more intuitively.

The screenshot shows a 'Task' window with a 'Details' header. The 'Subject' field contains a long alphanumeric string. Below it are several input fields for 'Priority', 'Status', 'Private', 'Created By', 'Assigned To', 'Profit Center', 'Team', 'Department', 'System / Module', 'Create Appt', 'Start Date', and 'Due Date'. To the right of these are fields for 'Entity Name', 'Entity #', 'Phone', 'Stock #', 'Current Lot', 'New Lot', 'Document Number', 'Notify Email', 'Notify on Completion', 'Notified', 'Complete', 'Completed Date', and 'Completed By'. A callout box labeled 'New icon' points to a small 'X' icon in the 'Entity Name' field. At the bottom of the window, there are five buttons: 'View Entity', 'View Stock #', 'Complete', 'Delete', and 'Save'. A callout box labeled 'Renamed buttons' points to the 'View Entity' and 'View Stock #' buttons.

To clear an entry in the **Entity Name** field, the **Stock #** field, or the **New Lot** field, simply click the new ✕ (Clear Field) icon for the field.

To access the Entity window for the entity, simply click the **View Entity** button, previously named the **View** button, at the bottom of the window. Similarly, to access the Unit Inventory window for the unit, simply click the **View Stock #** button, previously named the **View** button, at the bottom of the window.



Reports



Reports

New reports available

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

Parts & Service

- Receiving in Process Detail report. For more information, refer to page 41.
- Parts Inventory Count report. For more information, refer to page 43.



Reports

Report enhancements

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

Accounting


- Invoices Due report. For more information, refer to page 47.

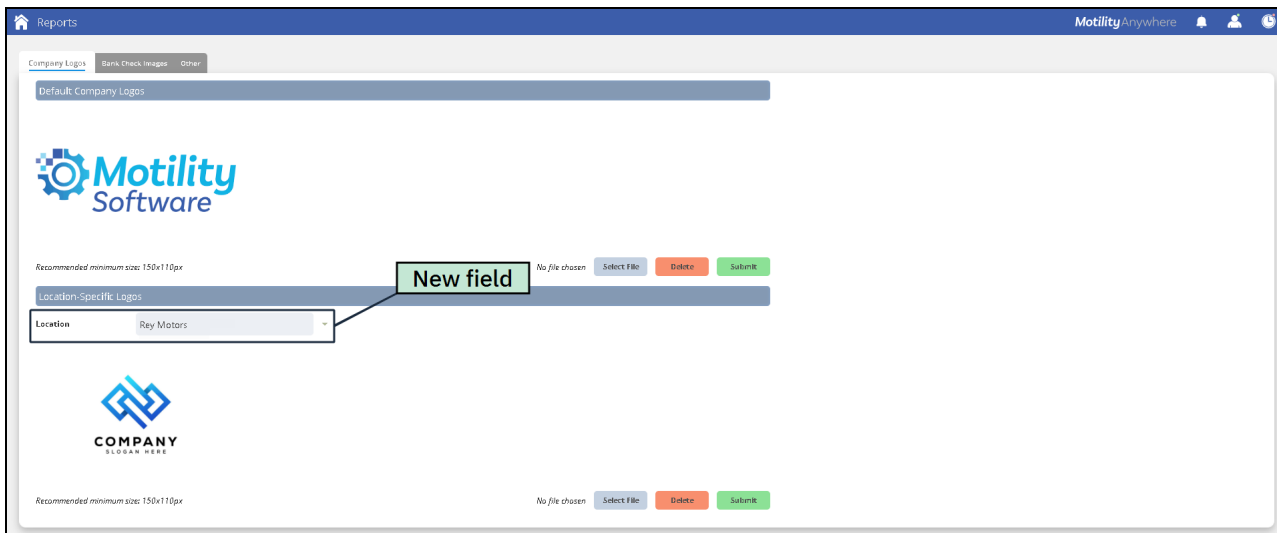
Parts & Service

- Parts On Non Cashed Out Invoices report. For more information, refer to page 42.

Redesigned screen for adding logos to reports

The Settings screen has been redesigned to help you add and update the logo that displays on a report more easily. With this enhancement, the Settings screen has been reorganized to display in a more visually appealing layout. In addition, you can now select the dealership for which to modify a logo more quickly using a new field.

To access the Settings screen, simply click the  (Settings) icon on any report screen, as normal.



In the new **Location** field, select the dealership for which to modify the logo. Then click the **Select File** button to select the image file to use for the logo, and click the **Submit** button to save the changes. Once saved, the logo is added to reports requested for the corresponding dealership.

Additional information

- The Company Images tab has been renamed the Company Logos tab.
- The recommended size for the image file has been updated to 150 x 110 pixels.



Miscellaneous Reports enhancement

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



Security Management



New security permissions available

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.

Parts & Service

- Parts & Service → **[INVOICING] Restricted From Clocking Into Waiting for Approval**. For more information, refer to page 40.
- Parts & Service → **[INVOICING] Restricted From Clocking Into Declined**. For more information, refer to page 40.



General System



Miscellaneous General System enhancements

- The Home Page screen has been redesigned in mobile view to display in a more accessible and visually appealing layout. The sections that display on this screen have been rearranged, and various icons and fields have been resized so that features can be accessed more easily.
- When selecting items in a pick list, all selected items are now highlighted in blue to differentiate selected items from items not selected.



Front-End Enhancements



Deal Desking



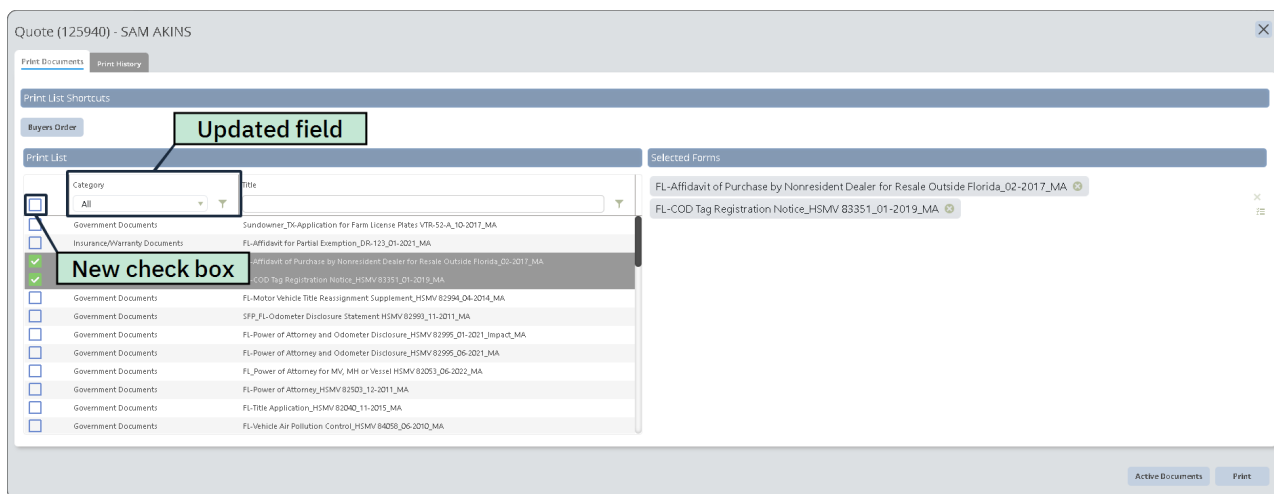
Updated windows for printing forms

Various enhancements are available for the Deal/Quote window, the Documents window, and the Print Forms window to help you select and print forms more easily. These windows have also been redesigned to display in a more intuitive layout.

Deal/Quote window

The Deal/Quote window has been reorganized, and various timesaving tools have been added to the window.

Note - The name of the Deal/Quote window varies based on the status of the deal from which it was accessed.



The following enhancements are available for the Deal/Quote window.

- The **Active Documents** button and the **Print** button now display in the bottom right corner, and the **Close** button has been removed.
- The Print List section now displays on the left side of the window, the Print List Shortcuts section now displays above the other sections, and selected forms now display in a new Selected Forms section to the right of the Print List section.
- In the Print List section, you can now select all documents using a new check box in the heading of the unlabeled **Selection** column.
- In the **Category** field, you can now click the Down Arrow to display a list of valid entries.



Documents window

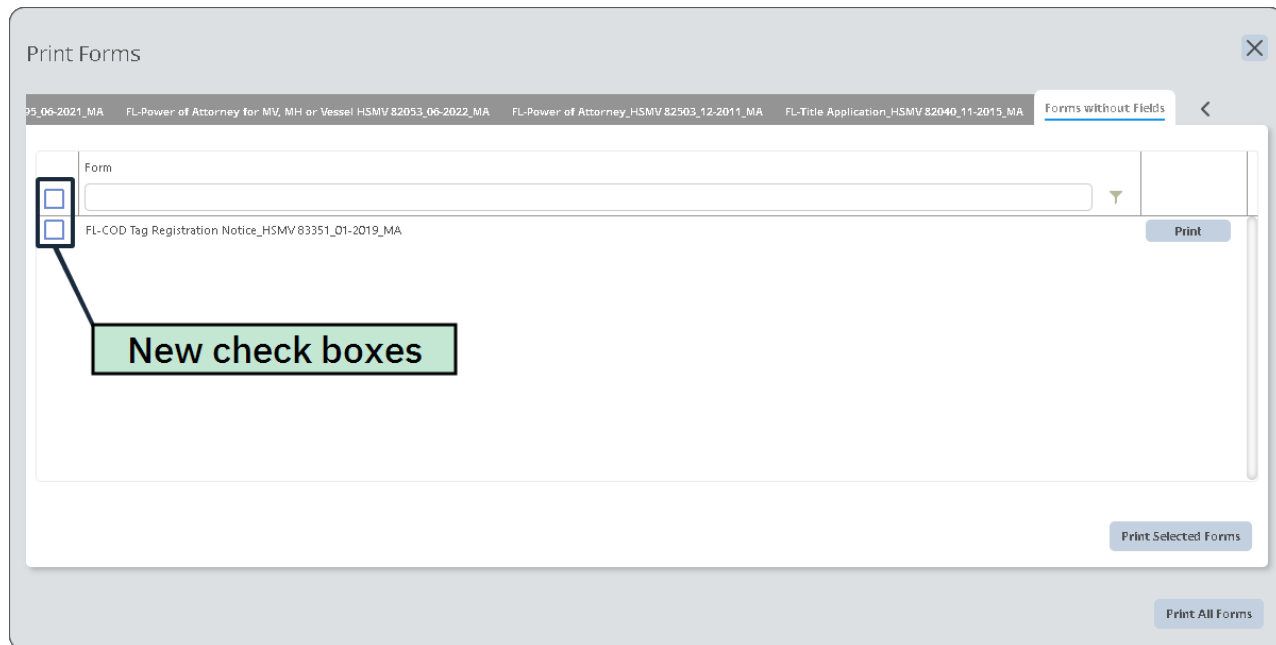
The Documents window now displays in a more visually appealing layout, and the **Close** button has been renamed the **Cancel** button.

The screenshot shows a window titled "Documents" with a close button (X) in the top right corner. The window contains a table with the following columns: Type, Document Name, Menu, and Active. The table lists various document types and names, with a green checkmark in the Active column for each row. A callout box labeled "Renamed button" points to the "Cancel" button at the bottom right of the window, which is next to a "Save" button.

Type	Document Name	Menu	Active
G	Sundowner_TX-Application for Farm License Plates VTR-52-A_01-2026_MA	2	✓
G	FL-Affidavit for Partial Exemption_DR-123_01-2026_MA	3	✓
H	FL-Affidavit of Purchase by Nonresident Dealer for Resale Outside Florida_02-2026_MA	1	✓
G	FL-COD Tag Registration Notice_HSMV 83351_01-2026_MA	2	✓
G	FL-Motor Vehicle Title Reassignment Supplement_HSMV 82994_04-2026_MA	2	✓
G	SFP_FL-Odometer Disclosure Statement HSMV 82993_11-2025_MA	2	✓
G	FL-Power of Attorney and Odometer Disclosure_HSMV 82995_01-2026_Impact_MA	2	✓
G	FL-Power of Attorney and Odometer Disclosure_HSMV 82995_05-2026_MA	2	✓
G	FL_Power of Attorney for MV, MH or Vessel HSMV 82053_06-2026_MA	2	✓
G	FL-Power of Attorney_HSMV 82503_12-2025_MA	2	✓
G	FL-Title Application_HSMV 82040_11-2025_MA	2	✓
G	FL-Vehicle Air Pollution Control_HSMV 84058_06-2025_MA	2	✓
A	Carpenters Campers_Buyers Order_MA	1	✓
A	Motility_Buyers Order MultiUnit_Logo_MA	1	✓
A	Lees Country RV_Purchase Agreement_MA	1	✓
G	MO-Delayed Delivery of Certificate of Ownership_Form 5830_08-2025_MA	2	✓
G	MO-General Affidavit_Form 768_05-2026_MA	2	✓
G	MO-Power of Attorney_Form 4054_08-2025_MA	2	✓
G	MO-UCC Financing Statement_Form UCC1_07-2026_MA	2	✓
H	American Motors_Delivery Receipt_MA	4	✓

Print Forms window

Multiple enhancements are available for the Print Forms window to help you select forms more efficiently.



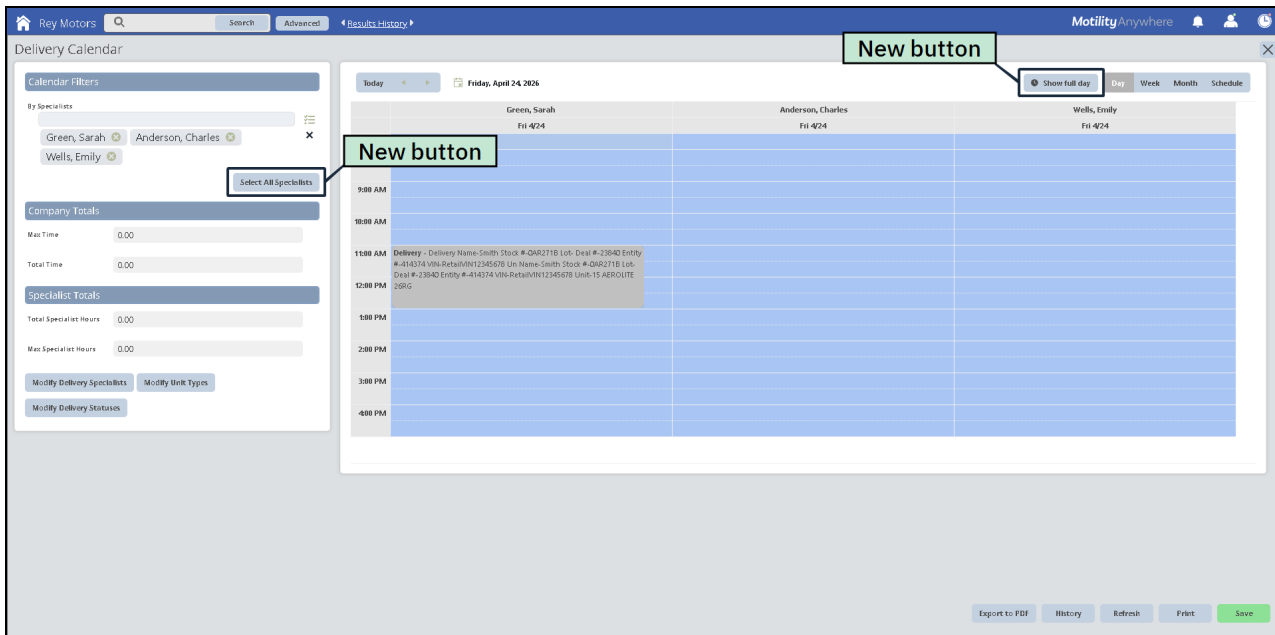
The following enhancements are available on the Print Forms window.

- The Forms w/o Fields tab has been renamed the Forms without Fields tab.
- On the Forms without Fields tab, a new unlabeled **Selection** column has been added so that you can select forms with no custom fields more quickly. The check boxes are automatically selected when the Forms without Fields tab is accessed. To deselect a form, clear the corresponding check box in the **Selection** column.
- To print the forms selected on the Forms without Fields tab, click the new **Print Selected Forms** button. A .pdf file containing all selected forms displays in a new tab of the Internet browser. To print all forms displayed on all tabs, click the **Print All Forms** button, as normal.



Updated window for scheduling appointments

The Delivery Calendar window has been updated to help you review and schedule appointments more easily. With this enhancement, new tools have been added, and the window displays in a more intuitive and visually appealing layout.



The following updates have been made to the Delivery Calendar window.

- On the Day tab, the Week tab, and the Schedule tab, click the new **Show Full Day** button to display all hours in a day in the unlabeled Calendar section. To only display business hours, click the new **Show Business Hours** button.
- In the Calendar Filters section, click the new **Select All Specialists** button to review appointments assigned to all specialists.
- The **By Specialists** field now displays at the top of the Calendar Filters section, and the ☰ (Multi-select) icon displays next to the **By Specialists** field to indicate that multiple specialists can be selected.
- The ✕ (Clear) icon now displays directly underneath the **By Specialists** field.
- The **Today** button now displays on the top left of the unlabeled Calendar section, and the **Export to PDF** button now displays on the bottom right of the Delivery Calendar window.
- The **Appointment History** button has been renamed the **History** button, and the **Apply** button has been renamed the **Save** button.
- The **Cancel** button, the **OK** button, and the **Search For** field have been removed.



Unit Inventory



Unit Inventory

Identify expected delivery dates at a glance

You can now review the expected delivery dates for units directly on the Unit Inventory Available Units List screen. Using the new **Exp Dlv Date** column on this screen, you can identify the expected delivery date for multiple incoming units and filter search results to review expected deliveries within a specified date range.

The screenshot shows the 'Unit Inventory Available Units List' screen in the MotilityAnywhere application. The interface includes a search bar at the top, a left-hand navigation menu with sections for Quick Links, Views, Tools, and History, and a main data table. The table has columns for various unit attributes: Condition, Consignment, Rental, Cylinders, Deal Number, Display On Internet, DMV Memo, DMV Fees, Engine Model, Exp Dlv Date, Floor Plan Company, Floor Plan Balan..., Fuel Type, and OVA. The 'Exp Dlv Date' column is highlighted with a red box, and a callout bubble with the text 'New column' points to it. Below the table, there are buttons for 'Clear Layout', 'Save Layout', 'Hide Preview', and 'Add New Unit'. At the bottom of the table area, it says '2796 Results'.

Additional information

- The **Exp** column on the Advanced Unit Search window and the Results for Units window has been renamed the **Exp Dlv Date** column.



Miscellaneous Unit Inventory enhancement

- The **Export to Excel** button has been removed from the Available Units List screen. To export data to Microsoft Excel, perform a search using the Advanced Unit Search window or the Results for Units window and then click the **Export to Excel** button, as normal.



Rental

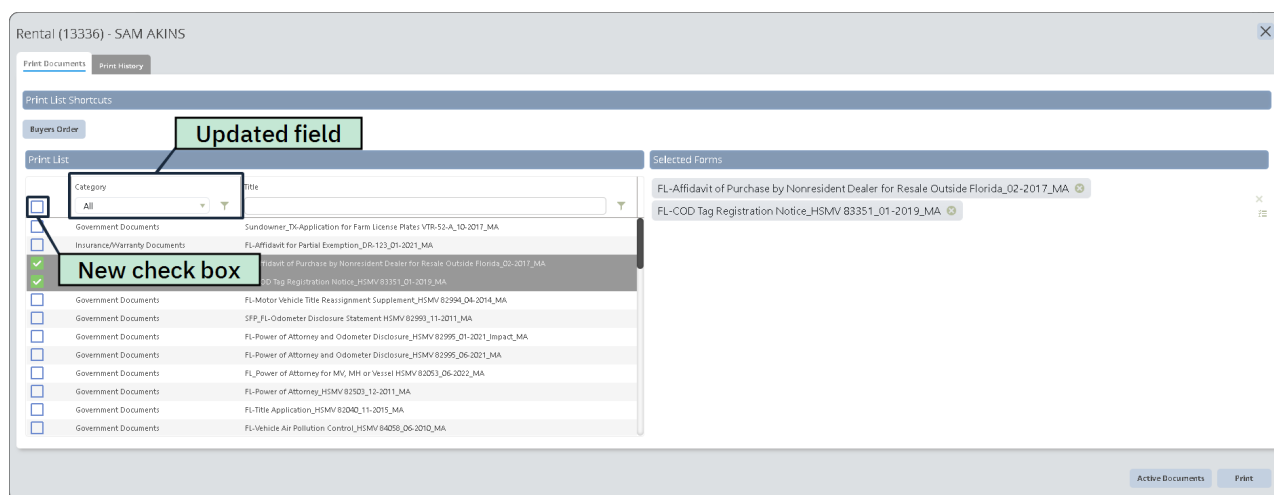
Rental

Updated windows for printing forms

Various enhancements are available for the Rental window, the Documents window, and the Print Forms window to help you select and print forms more easily. These windows have also been redesigned to display in a more intuitive layout.

Rental window

The Rental window has been reorganized, and various timesaving tools have been added to the window.



The following enhancements are available for the Rental window.

- The **Active Documents** button and the **Print** button now display in the bottom right corner, and the **Close** button has been removed.
- The Print List section now displays on the left side of the window, the Print List Shortcuts section now displays above the other sections, and selected forms now display in a new Selected Forms section to the right of the Print List section.
- In the Print List section, you can now select all documents using a new check box in the heading of the unlabeled **Selection** column.
- In the **Category** field, you can now click the Down Arrow to display a list of valid entries.



Documents window

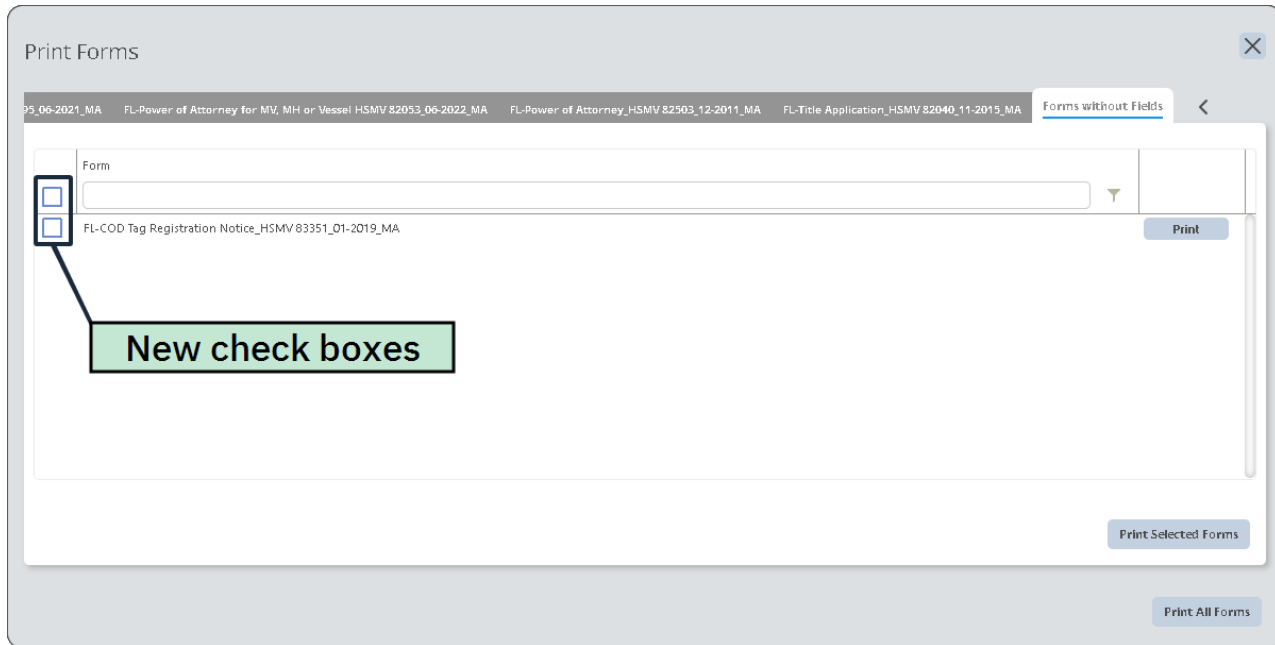
The Documents window now displays in a more visually appealing layout, and the **Close** button has been renamed the **Cancel** button.

The screenshot shows a window titled "Documents" with a close button (X) in the top right corner. Below the title bar is a search and filter area with four fields: "Type", "Document Name", "Menu", and "Active". The "Active" field is a dropdown menu currently set to "All". Below this is a table with the following columns: "Type", "Document Name", "Menu", and "Active". The "Active" column contains green checkmarks. At the bottom right of the window, there are two buttons: "Save" (green) and "Cancel" (grey). A callout box labeled "Renamed button" points to the "Cancel" button.

Type	Document Name	Menu	Active
G	Sundowner_TX-Application for Farm License Plates VTR-52-A_01-2026_MA	2	✓
G	FL-Affidavit for Partial Exemption_DR-123_01-2026_MA	3	✓
H	FL-Affidavit of Purchase by Nonresident Dealer for Resale Outside Florida_02-2026_MA	1	✓
G	FL-COD Tag Registration Notice_HSMV 83351_01-2026_MA	2	✓
G	FL-Motor Vehicle Title Reassignment Supplement_HSMV 82994_04-2026_MA	2	✓
G	SFP_FL-Odometer Disclosure Statement HSMV 82993_11-2025_MA	2	✓
G	FL-Power of Attorney and Odometer Disclosure_HSMV 82995_01-2026_Impact_MA	2	✓
G	FL-Power of Attorney and Odometer Disclosure_HSMV 82995_05-2026_MA	2	✓
G	FL_Power of Attorney for MV, MH or Vessel HSMV 82053_06-2026_MA	2	✓
G	FL-Power of Attorney_HSMV 82503_12-2025_MA	2	✓
G	FL-Title Application_HSMV 82040_11-2025_MA	2	✓
G	FL-Vehicle Air Pollution Control_HSMV 84058_06-2025_MA	2	✓
A	Carpenters Campers_Buyers Order_MA	1	✓
A	Motility_Buyers Order MultiUnit_Logo_MA	1	✓
A	Lees Country RV_Purchase Agreement_MA	1	✓
G	MO-Delayed Delivery of Certificate of Ownership_Form 5830_08-2025_MA	2	✓
G	MO-General Affidavit_Form 768_05-2026_MA	2	✓
G	MO-Power of Attorney_Form 4054_08-2025_MA	2	✓
G	MO-UCC Financing Statement_Form UCC1_07-2026_MA	2	✓
H	American Motors_Delivery Receipt_MA	4	✓

Print Forms window

Multiple enhancements are available for the Print Forms window to help you select forms more efficiently.



The following enhancements are available on the Print Forms window.

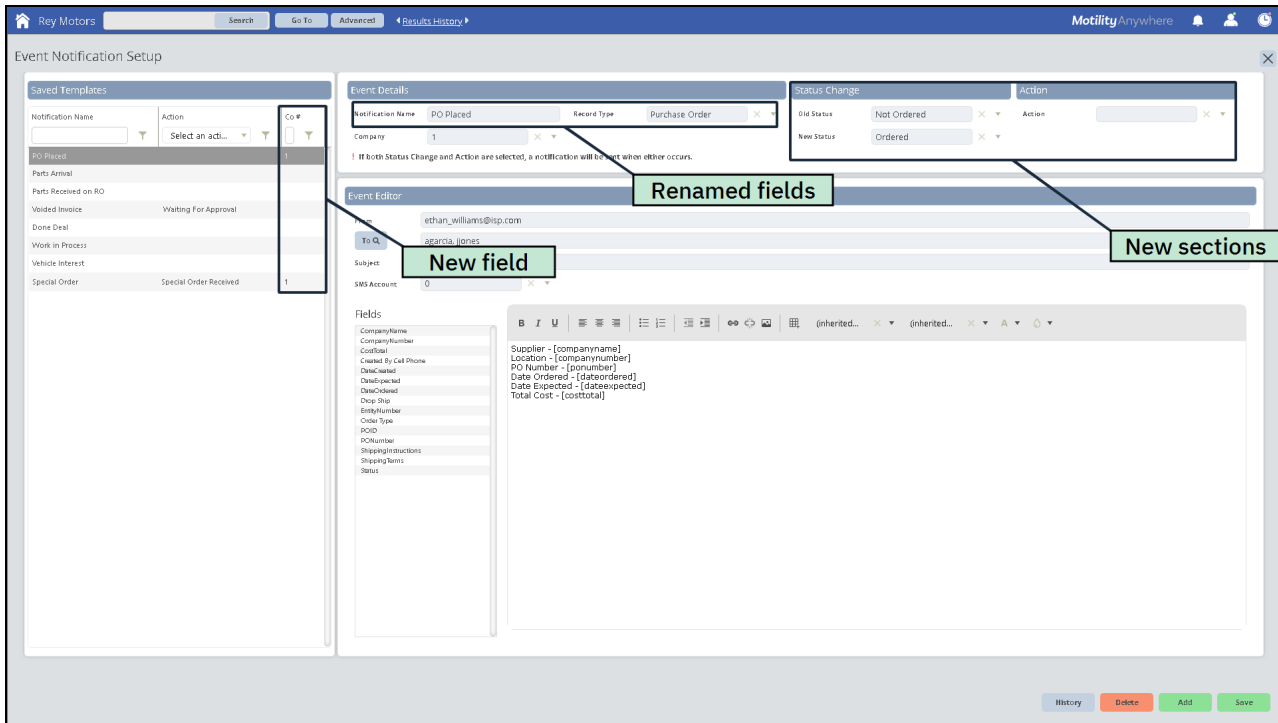
- The Forms w/o Fields tab has been renamed the Forms without Fields tab.
- On the Forms without Fields tab, a new unlabeled **Selection** column has been added so that you can select forms with no custom fields more quickly. The check boxes are automatically selected when the Forms without Fields tab is accessed. To deselect a form, clear the corresponding check box in the **Selection** column.
- To print the forms selected on the Forms without Fields tab, click the new **Print Selected Forms** button. A .pdf file containing all selected forms displays in a new tab of the Internet browser. To print all forms displayed on all tabs, click the **Print All Forms** button, as normal.



CRM

Updated window for setting up event notifications

Multiple enhancements are now available for the Event Notification Setup window to help you set up notifications more intuitively.



The following enhancements are now available for the Event Notification Setup window.

- Fields at the top of the window that were previously in the Event Details section have been reorganized into the Event Details, Status Change, and Action sections to more closely match the workflow for adding a notification.
- The **Campaign Type** field has been renamed the **Notification Name** field, and the **System Mode** field has been renamed the **Record Type** field to more clearly indicate their purpose. The valid options for the **Record Type** field have also been renamed to provide a more detailed description of the type of record associated with the notification.
- A new message displays in the Event Details section to indicate that if both a status change and an action are selected for a notification, the notification is sent when either occurs.
- The **Action** field now displays a more concise list of valid entries that correspond specifically to the entry in the **Record Type** field.



- The new **Co #** field in the Saved Templates section displays the company number for the notification.



Review entity status when searching for entities

When searching for entities, you can now quickly identify the status of each entity included in the search results. In the new **Status** column on the Results for Search Criteria window, the status name and color for each entity display for you to review at a glance.

Entity Number	Status	First Name	Company/LastName	Full Name	Email Address	Address	City	State	Zip
324227	OPEN	Steve & Kalyse	Greener	Steve & Kalyse Greener		12893 Hwy. 196	Terrebonne	AR	71954
137201	OPEN	Jim Edd	Greene, Jr.	Jim Edd Greene, Jr.		6129 FM 248	Jefferson	TX	75457
004319	OPEN	Mr Jim Edd	Greene Jr	Mr Jim Edd Greene Jr		PO Box 153	Jefferson	TX	TX
312161	Ready To Buy	Allen	GREENE			5215 BENTON ROAD	CROWLEY	LA	70526
130041	OPEN	WILLIAM	GREENE			P.O. Box 7	DUBACH	LA	71235
321591	Ready To Buy	JOHN	GREENE	JOHN GREENE		136 EVES ST	JEANERETTE	LA	70544
1207	OPEN	JAMES	GREENE	JAMES GREENE		1090 GREENE ROAD	MINDEN	LA	71055
009200	PENDING SOLD	GARY W	GREENE	GARY W GREENE		2546 DOC STEED RD	MINDEN	LA	71055
127179	OPEN	JESSIE	GREENE	JESSIE GREENE		327 HAMBRICK ROAD	HOUSTON	TX	71020
306358	PENDING SOLD	ANNETTE	GREENE	ANNETTE GREENE		402 Caray Lane	Minden	LA	71055
275214	OPEN	Kristy	Greene	Kristy Greene		15101 CR 240	Arp	TX	75750
145044	Ready To Buy	Luke	Greene	Luke Greene		406 DOC STEED RD	Minden	LA	71055
148063	OPEN	Deb	Greene	Deb Greene		2223 Florida Street	Arcadia	LA	71001
000912	OPEN	Bobby	Greene	Bobby Greene		2546 DOC STEED RD	MINDEN	LA	71055
200916	OPEN	Chad	Greene	Chad Greene		354 Ma Street	BIVINS	TX	75555
005978	PENDING SOLD	Max	Greene	Max Greene		147 Cr 2525	MINEOLA	TX	29201
010590	OPEN	James	Greene	James Greene		14155 Johns Gin Road	Kelthville	La	71047
013107	Ready To Buy	James	Greene	James Greene		402 Caray Lane	Minden	LA	71055
001395	OPEN	Curtis	Greene	Curtis Greene		354 Ma County Rd 3318	BIVINS	TX	75555
203104	Ready To Buy	Kirby	Greene	Kirby Greene		147 Cr 2559	MINEOLA	TX	75773
3189338196	OPEN	Willie Joe	Greene	Willie Joe Greene		14141 Johns Gin Road	Kelthville	La	71047
014194	PENDING SOLD	Norris	Greene	Norris Greene					

In addition, you can filter the search results based on entity status by entering a status in the new **Status** field.



Miscellaneous CRM enhancements

- The **Export to Excel** button has been removed from the Contact List screen. To export data to Microsoft Excel, perform a search using the Advanced Entity Search window or the Results for Contacts window and then click the **Export to Excel** button, as normal.
- When you define criteria for a Dashboard view, the criteria is now automatically retained until you define the criteria again. Simply define criteria for the Dashboard view using the Dashboard Parameters window and click the **Submit** button, as normal. If the Dashboard view is closed and accessed again, the metrics are refreshed and automatically display based on the previously defined criteria, allowing you to quickly review metrics you regularly analyze using a Dashboard view.



Fixed Operations Enhancements



Parts & Service



Parts & Service

Assign salespersons to parts or repairs on invoices

When adding parts or repairs to parts or service invoices, you can now assign a specific salesperson to each part or repair added, making it easier for you to designate the employees who should receive credit for the sales.

For example, suppose one employee is assigned as the service advisor on an invoice; however, a second employee sells a part for the same invoice. You can assign the second employee as the salesperson for the individual part being added so that the appropriate employee receives credit for the sale.

To assign a salesperson to a part or repair, select the employee in the updated **Assign Salesperson** field on the Parts Invoice or Service Invoice window. Then add a part or repair to the parts invoice or service invoice, as normal. The employee currently selected in the **Assign Salesperson** field is assigned as the salesperson to the parts or repairs added to the invoice.

Note - A list of salespersons assigned to each part or repair on a selected parts invoice or service invoice can be viewed on the Apply Salespeople window, as normal.

Additional information

- The **Employee** field has been renamed the **Assign Salesperson** field on the Parts Invoice window and the Service Invoice window.



- To display a new tooltip with a description of how to assign an employee as the salesperson for a part or repair, hover the mouse cursor over the **Assign Salesperson** field on the Parts Invoice window or the Service Invoice window.



Parts & Service

Assign advisors to invoices using new field location

The **Advisor** field on the Parts Invoice window has been relocated to help you assign advisors to invoices more intuitively. Previously, the **Advisor** field was located at the bottom of the Totals tab on the Parts Invoice window. Now, the **Advisor** field is located in the Parts Ticket Info section at the top of the Parts Invoice window.

The screenshot displays the Motility software interface for a Parts Invoice window. The window title is 'Parts INV -136718(Jackson, Matthew - #419585)'. The interface is divided into several sections:

- Customer Info:** Includes fields for Entry Name (Jackson, Matthew), Parts Category (A), Credit Limit (\$0.00), Credit Balance (\$0.00), Shipping Address (Billing), and Tax Alternate.
- Parts Ticket Info:** Includes fields for Document# (1819756), 1-A, Cashed Out Date, Department (Parts Dept.), Tickets Type (Parts Retail), Last Promised Date (5/29/2026), Date Created (5/18/2026), External Status (Retail), Assign Sa Inperson (Johnson, Bob), Assign Sa Inperson (Wilson, Travis), Original Promised Date (5/28/2026), Usage Date (5/18/2026), and Delivery Date (5/29/2026).
- Parts List:** A table with columns for Part Number, Description, Sold, Relieved, Diff, US, D/S, Vehicle, Price, Core, Discount, Total, Calc, Expected Date, Upsell, and Substitutes. Two parts are listed: 00-5119 (RHS1A AD BGF0WHHTJWHF CS) and 000012 (SNK COVER_BAMBOO_13" X 15").
- Totals:** A summary table with columns for Parts Total, Core Total, Freight Total, Sublet Total, Labor Total, Propose Total, Ship Total, SO Total, Others Total, Sub Total, Discount Total, Est Price, Sales Tax Total, Total, Deposits, and Net Total.

The 'Advisor' field in the Parts Ticket Info section is highlighted with a red box and labeled 'New location'.

To assign an advisor, simply enter the full or partial advisor name in the **Advisor** field and select the advisor from the list of valid entries, as normal. Once the advisor is selected, the advisor name displays in the field.



Easily identify repair orders with deposits

Using a new column on the Service Invoicing List screen, you can easily identify which repair orders have at least one deposit that has been cashed out, reducing the need to open and review each invoice individually for deposit information. If at least one deposit has been cashed out for a repair order, the check box in the new **Deposit** column on the Service Invoicing List screen is selected for the repair order.

The screenshot shows the 'Service Invoicing List' screen in the MotilityAnywhere application. A new column titled 'Deposit' has been added to the table, containing checkboxes. A callout box labeled 'New column' points to this column. The table lists various repair orders with columns for Adisor, Promised, Price Total, Comp., CP, Customer Name, Doc #, Deposit, Net, Mech #, Net Total, Status, Stock #, Notify Date, and Tag. The 'Deposit' column has checkboxes that are checked for several rows, indicating that at least one deposit has been cashed out for those repair orders.

Adisor	Promised	Price Total	Comp.	CP	Customer Name	Doc #	Deposit	Net	Mech #	Net Total	Status	Stock #	Notify Date	Tag
457186	05/20/2026	\$2,963.86	1 of 6	<input checked="" type="checkbox"/>	Richards, Jane	18192710	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	457186	\$2,963.86	Cashed	124124	05/20/2026	543543
457177	05/21/2026	\$6,394.79	5 of 26	<input checked="" type="checkbox"/>	Taylor, Matt	1804728A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	457177	\$6,394.79	Cashed	016329	05/21/2026	543544
457186	05/21/2026	\$971.17	1 of 9	<input checked="" type="checkbox"/>	Smith, Eddy	1800724	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	457186	\$971.17	Cashed	010130	05/21/2026	543545
457175	05/21/2026	\$1,911.62	7 of 8	<input checked="" type="checkbox"/>	Tate, Jim	1005495A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	457175	\$1,911.62	Cashed	017595	05/21/2026	543546
457178	05/22/2026	\$3,577.30	0 of 6	<input checked="" type="checkbox"/>	Lane, John	1081506	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	457178	\$3,577.30	Cashed	124180	05/22/2026	543547
457175	05/22/2026	\$5,156.65	4 of 13	<input checked="" type="checkbox"/>	Jackson, Larry	1030718	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	457175	\$5,156.65	Cashed	019339	05/22/2026	543548
457174	05/22/2026	\$182.95	0 of 1	<input type="checkbox"/>	Tanneer, Mark	1819939	<input type="checkbox"/>	<input type="checkbox"/>	457174	\$182.95	Cashed	430230	05/22/2026	543549
457177	05/22/2026	\$98.00	0 of 1	<input checked="" type="checkbox"/>	Tate, Jim	1819933	<input type="checkbox"/>	<input type="checkbox"/>	457177	\$98.00	Cashed	393494	05/22/2026	543550
457186	05/22/2026	\$285.98	0 of 1	<input checked="" type="checkbox"/>	Bailey, Eric	1819932	<input type="checkbox"/>	<input type="checkbox"/>	457186	\$285.98	Cashed	238641	05/22/2026	543551
457175	05/22/2026	\$47.86	0 of 1	<input checked="" type="checkbox"/>	Taylor, Matt	1819929	<input type="checkbox"/>	<input type="checkbox"/>	457175	\$47.86	Cashed	231639	05/22/2026	543552
457174	05/23/2026	\$301.98	0 of 1	<input type="checkbox"/>	Allen, James	1819926	<input type="checkbox"/>	<input type="checkbox"/>	457174	\$301.98	Cashed	232336	05/23/2026	543553
457175	05/23/2026	\$247.86	0 of 1	<input type="checkbox"/>	Vance, Kyle	1819925	<input type="checkbox"/>	<input type="checkbox"/>	457175	\$247.86	Cashed	010106	05/23/2026	543554
457178	05/20/2026	\$33.66	0 of 1	<input type="checkbox"/>	Richards, Jane	1819924	<input type="checkbox"/>	<input type="checkbox"/>	457178	\$33.66	Cashed	-412694	05/20/2026	543555
457177	05/23/2026	\$1,364.81	0 of 1	<input type="checkbox"/>	Wade, Nancy	1819923	<input type="checkbox"/>	<input type="checkbox"/>	457177	\$1,364.81	Cashed	010927	05/23/2026	543556

Note - A list of all current deposits associated with an invoice can be reviewed on the Current Deposits for this Document window, as normal.



Parts & Service


Part number column added to Parts Requests screen

Part numbers for parts requests can now be viewed directly on the Parts Requests screen. This enhancement can save you time when fulfilling parts requests, since fewer steps are required to reference the parts numbers for the requests.

The screenshot shows the 'Parts Requests' screen in the MotilityAnywhere application. A new column labeled 'Part #' has been added to the table. A callout box points to this column with the text 'New column'. The table contains the following data:

Doc.	Req. Status	S. Dept.	Advisor Name	Rep #	Part #	Sublet	Name	P. Dept.	Req. Date	Appr. Status
1819358	Not Fulfilled		Bern, Joe	1	242424	<input type="checkbox"/>	Davis, Julie	Automotive	05/16/2026 5:15:00	
1819546	Not Fulfilled		Murr, Ben	2	46477	<input checked="" type="checkbox"/>	Johnson, Mark		05/16/2026 10:26:00	
1819546	Not Fulfilled		Murr, Ben	2	249249	<input checked="" type="checkbox"/>	Johnson, Mark		05/16/2026 10:26:00	
1819546	Not Fulfilled		Murr, Ben	2	46477	<input checked="" type="checkbox"/>	Johnson, Mark		05/16/2026 10:26:00	
1819538	Not Fulfilled		Lauren, Phil	3	49242	<input type="checkbox"/>	Adams, Bob		05/15/2026 2:03:00	
1819625	Sublet	Parts Dept	Froeh, Justin	4	9810	<input checked="" type="checkbox"/>	Brown, Richard		05/15/2026 1:16:00	
1819675	Sublet	Parts Dept	Bern, Joe	1	192	<input checked="" type="checkbox"/>	Brown, Richard		05/15/2026 10:10:00	Waiting For Appr

The new **Part #** column displays the part number entered on the Parts Requests tab on the Service Invoice window for a parts request.

*Note - The new **Part #** column does not display on the Parts Requests screen by default. To display the column, click the  (Column Settings) icon and select the Columns menu option, as normal. Then select the **Part #** check box.*



Review the full parts list on the Parts List window

You can now more easily review and update the full parts list on service invoices, receiving tickets, and purchase orders with a large number of parts. Previously, you were required to scroll through a parts list section to review all parts. Now, you can access the Parts List window, where parts are listed in an enlarged display for easier review, directly from the Service Invoice window, the Receiving window, and the Purchase Order window.

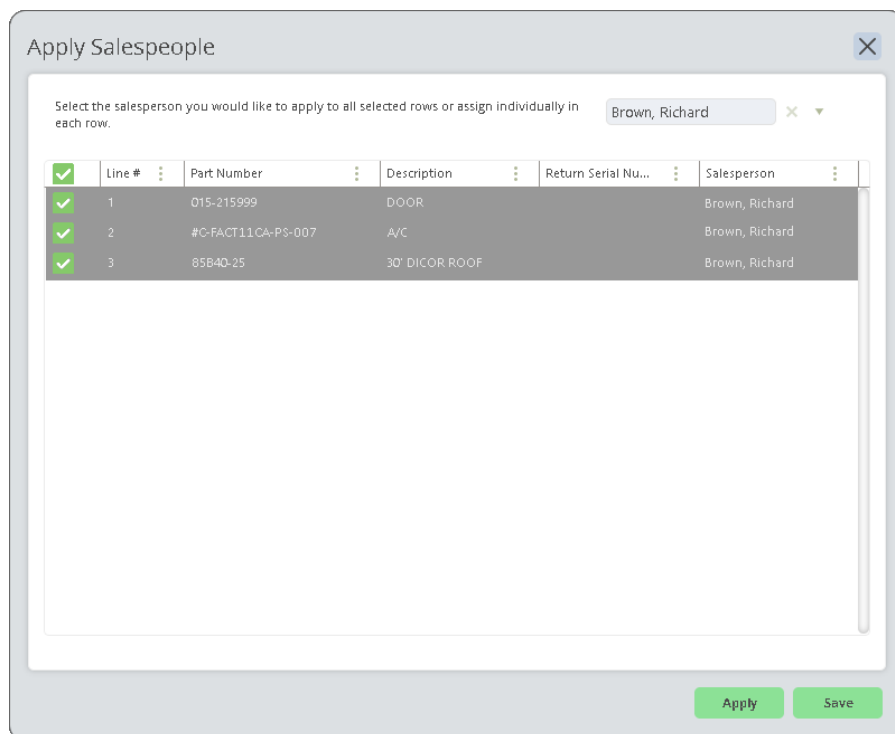
To display the Parts List window, simply click the new **Show More** button in the Parts section on the Service Invoice window or in the Parts List section on the Receiving window or the Purchase Order window. The Parts List window displays, where you can review and update the parts as needed. Once changes are made, simply click the **Show Less** button to close the window and save the changes.

Quickly assign salespeople to parts and repairs on an invoice

You can now more efficiently assign a salesperson to multiple parts on a parts invoice or parts and repairs on a service invoice. Using the new Apply Salespeople window, you can assign salespersons to parts and repairs using fewer steps.

Note - The Apply Part Salesperson window and the Invoice Salespeople window have been replaced by the Apply Salespeople window.

To access the Apply Salespeople window from a parts invoice, simply display the invoice and click the **Choose Salesperson** button. Similarly, to access the Apply Salespeople window from a service invoice, display the invoice and click the **Choose Salesperson** button or the **Select Sales Rep** button.



To assign a salesperson to multiple parts on an invoice, select the salesperson in the unlabeled **Salesperson** field. Then select each check box corresponding to the parts you need to assign and click the **Apply** button to assign the parts to the salesperson. Alternatively, you can select the unlabeled **Select All** check box at the top of the unlabeled **Check Box** column and then click the **Apply** button to assign all parts to the salesperson. Once parts are assigned, click the **Save** button to save the changes.



Restrict technicians from clocking into unapproved jobs

Using new security permissions on the Permissions window in Security Management, you can prevent a service technician from clocking into jobs that are currently unapproved. In addition, these new permissions can be used to restrict a service technician from changing the status of a job that does not currently require work to be completed, such as a job in Waiting for Approval status or Declined status.

When the new Parts & Service → **[INVOICING] Restricted From Clocking Into Waiting for Approval** permission is selected for an employee, the following actions are restricted.

- The user cannot clock into jobs in Waiting for Approval status.
- If the user attempts to change the status of a job to Waiting for Approval status while the user is clocked into the job, a new message window displays to indicate that the user does not have permission to clock into a job in that status. If the user changes the status of the job to Waiting for Approval status, the user is clocked out of the job.
- The user cannot clock other users into jobs in Waiting for Approval status.

When the new Parts & Service → **[INVOICING] Restricted From Clocking Into Declined** permission is selected for an employee, the following actions are restricted.

- The user cannot clock into jobs in Declined status.
- If the user attempts to change the status of a job to Declined status while the user is clocked into the job, a new message window displays to indicate that the user does not have permission to clock into repairs in that status. If the user changes the status of the job to Declined status, the user is clocked out of the job.
- The user cannot clock other users into jobs in Declined status.



Review unposted receiving tickets using new report

Managers can use the new Receiving in Process Detail report to review details for all receiving tickets that have not been posted to accounting. Using this report, you can determine whether individual unposted receiving tickets have been received, the value of the unposted tickets, and the supplier for the tickets. The unposted receiving tickets on this report are sorted by profit center and general ledger (G/L) account by default.

To access the report from the Reports module, select Parts Reports → Misc Parts Reports, and select the Receiving in Process Detail report.

PC RE #	Status	PO #	Part #	Description	Supplier	Qty Rec	Qty Ord	Cost/Item	Ext. Cost	Date Rec	Date Mod
Profit Center: Rey Motors											
GL Account: 1242											
A	1092858	OPEN	17119	20X39 FENDERSKIRT, 1051 CHAIRPADD	GENERAL Distribution	1	1	\$44.00	\$66.00	5/17/2025	5/19/2025
A	1093273	OPEN	16719	00- ALUMINUM BLINDS 14 X 38	GENERAL Distribution	1	1	\$19.99	\$29.99	5/12/2025	5/16/2025
A	1093291	OPEN	10667	00- ALUMINUM BLINDS 32 X 24	ABC Distribution	1	1	\$29.99	\$39.99	5/7/2025	5/9/2025
A	1093302	RECEIVED	10675	00- FIESTA, 18 SLF/DWHTWHT C	ABC Distribution	10	10	\$393.53	\$636.30	5/6/2025	5/6/2025
A	1093302	RECEIVED	10677	19- POWER OUTLET BOX	ABC Distribution	5	5	\$32.39	\$61.95	5/2/2025	5/2/2025
Total For GL Account 1242										\$733.23	
Total For Profit Center Rey Motors										\$733.23	
Grand Total										\$733.23	

To request the report, select criteria in the Preview Parameters section and then click the **Run** button.



Parts & Service

Review invoices by item type on the Parts On Non Cashed Out Invoices report

You can now limit the parts and service invoices included on the Parts On Non Cashed Out Invoices report by specific invoice item types, such as parts wholesale or service internal. In addition, invoices on the report are now grouped by invoice item type. With this enhancement, you can more easily identify similar invoices to address when researching which open invoices should be cashed out.

Note - Item types are defined on the Parts & Service subtab on the App Settings tab on the Settings screen, as normal.

Parts On Non Cashed Out Invoices

Item #	Date Added	Part #	Description	Qty	Ext. Price	Ext. Cost	Profit	Margin %
Item Type: Parts Body Shop								
3034278	05/03/2026	00-7308	88" SIDE-OUT COVER WHITE	1.00	\$409.71	\$132.42	\$277.29	67.88%
Item Type: Parts Retail								
1003699	05/03/2026	04-0308	OUTRIGGER RV/RUG CASTLE G	1.00	\$13.49	\$7.88	\$5.61	41.59%
1810876	04/20/2026	117926	VALVE VACUUM BREAKER	1.00	\$56.36	\$37.00	\$19.35	33.16%
1810936	04/20/2026	221672-123	Shower-Door-14"x20" w/Handle BRASS-CHROME	1.00	\$127.07	\$83.05	\$44.02	34.64%
1810938	04/20/2026	0122779	BATTERY CONTROL CENTER	1.00	\$388.78	\$178.50	\$210.28	54.09%
1816276	04/20/2026	06258	32IN SAFETY CHAIN CL.III	1.00	\$17.09	\$9.50	\$7.59	44.41%
1816341	04/20/2026	23414	WINDSHIELD PASSENGER SIDE	1.00	\$287.49	\$199.66	\$87.83	29.03%
1816341	04/22/2026	234163	REMOTE FOR STEREO	1.00	\$39.80	\$16.00	\$23.80	64.77%
1816341	04/22/2026	234163	GLASS MIRROR 10 1/2X32 1/2	1.00	\$16.94	\$6.65	\$10.29	60.74%
1816341	04/22/2026	234192	SHADE -RIGHT ONLY 60" X 30" SUEDE	1.00	\$27.48	\$21.80	\$5.68	21.40%
1816341	04/20/2026	234194	LIGHT FIXTURE	1.00	\$6.67	\$3.13	\$3.44	62.36%
1816341	04/20/2026	234198	Entrance Door	1.00	\$201.07	\$202.83	\$19.44	9.71%
1816341	04/20/2026	23420	3" x 3" x 1.5" poly tee	1.00	\$16.45	\$7.83	\$8.62	62.40%
1816341	04/20/2026	23429	PVC TEE	1.00	\$17.25	\$6.49	\$10.76	62.38%
1816341	04/20/2026	2343167	Westinghouse 22" TV	1.00	\$281.24	\$178.49	\$102.75	36.53%
1816341	04/20/2026	23436L	A 6" PVC P-TRAPS	1.00	\$5.39	\$2.78	\$2.61	48.42%
1816341	04/20/2026	234406	SHOWER DOOR ASSEMBLY	1.00	\$388.78	\$179.50	\$210.28	64.09%
1816341	04/20/2026	23440L	1 1/4" plug	1.00	\$7.78	\$5.56	\$2.22	28.53%
1816341	04/18/2026	234416	MONITOR/PANEL CONTROL SWITCHES	1.00	\$127.07	\$83.05	\$44.02	34.64%
1816341	04/18/2026	234420	TAIL LIGHT ROUND	1.00	\$27.36	\$17.10	\$10.26	37.50%
1817298	04/18/2026	01-00056-00	RELAY BATTERY DISCON W/FUSE	1.00	\$48.84	\$37.00	\$11.84	24.24%
1817298	04/18/2026	01-00056-00	RELAY BATTERY DISCONNECT	1.00	\$56.36	\$37.00	\$19.35	33.16%
1818930	04/18/2026	0180232	COIL WATER HOSE W/SPRAYER	1.00	\$80.04	\$46.38	\$33.66	42.05%
1818930	04/18/2026	0181-0212	COIL-AUTOTONK	1.00	\$7.78	\$5.56	\$2.22	28.53%
1818930	04/18/2026	0187-0266	LOW OIL SWITCH	1.00	\$90.51	\$64.65	\$25.86	28.57%
Grand Totals				26	\$2,744.68	\$1,430.26	\$1,284.85	47.31%

*** This report only shows items that have a internal category of PR.
 Cashed Out Date between 01/01/2026 and 09/30/2026. Include Grand Profit Center + Pass. Release Quantity only + Truck, Show Only Parts Sold Less Than Cost + Pass. Group by Profit Center + No.
 Thursday, 16 May, 2026 03:11:07 PM Page 1 of 3

To define the invoice item types to include on the report, simply select the item types in the new **Item Type** field in the Preview Parameters section. For example, suppose you want to include only retail and internal parts invoices on the report. Then simply select **Parts Retail** and **Parts Internal** in the **Item Type** field, and click the **Run** button. The invoices for the selected item types display on the report grouped by invoice item type.

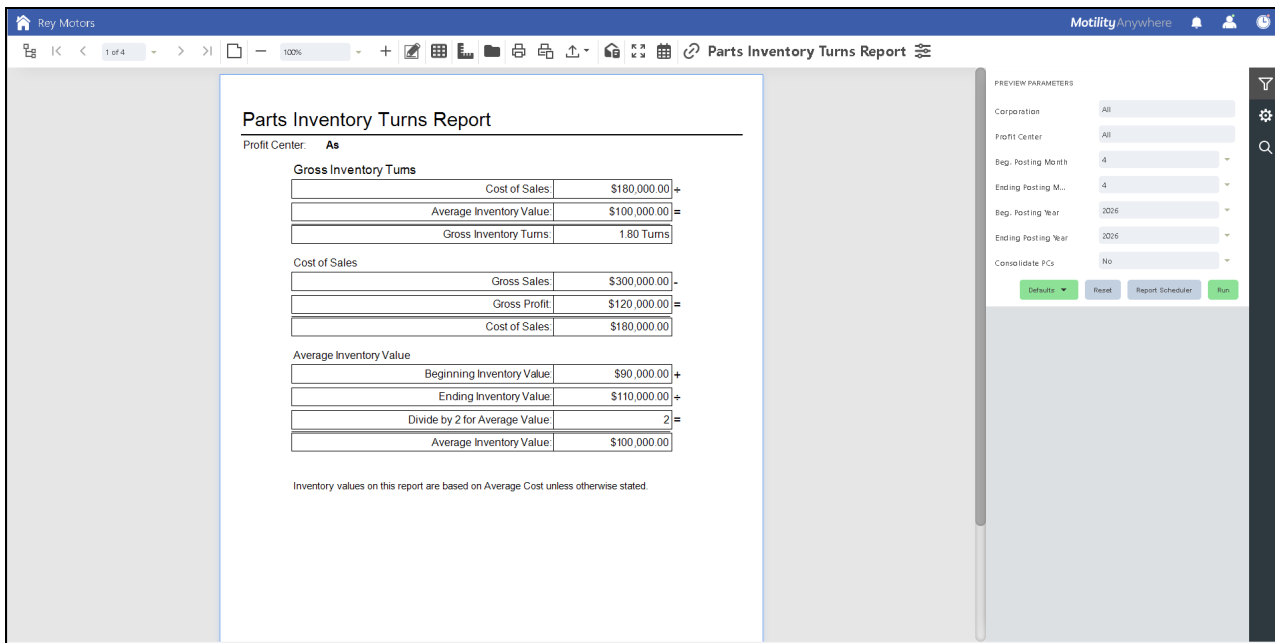
Note - Valid item types for the Item Type field vary depending on the entry in the Invoice Type field.



Review gross inventory turns using new report

Using the new Parts Inventory Count report, you can easily review gross parts inventory turns as well as the calculations used to determine the values included in the formula for gross inventory turns. In addition, this report can be requested to display information for a specific date range by month and year.

To access the Parts Inventory Count report from the Reports module, select Parts Reports → Master Inventory Reports → Parts Inventory Turns report.



The following calculations and related values can be reviewed on the report:

- $\text{Gross Inventory Turns} = \text{Cost of Sales} / \text{Average Inventory Value}$
- $\text{Cost of Sales} = \text{Gross Sales} - \text{Gross Profit}$
- $\text{Average Inventory Value} = (\text{Beginning Inventory Value} + \text{Ending Inventory Value}) / 2$

To request the report, select criteria in the Preview Parameters section and then click the **Run** button.



Miscellaneous Parts & Service enhancements

- When you define criteria for a Dashboard view, the criteria is now automatically retained until you define the criteria again. Simply define criteria for the Dashboard view using the Dashboard Parameters window and click the **Submit** button, as normal. If the Dashboard view is closed and accessed again, the metrics are refreshed and automatically display based on the previously defined criteria, allowing you to quickly review metrics you regularly analyze using a Dashboard view.
- Entries up to 9,999,999 can now be made in various fields used to update the total on-hand quantity for parts in the Parts & Service module.
- You can now save changes made to the Parts Ordering List window more easily using a new button. To save changes on the Parts Ordering List window, simply select the new **Save** button located at the bottom of the window.



Business Office Enhancements



Accounting



Accounting

Portrait page orientation available for the Invoices Due report

You now have increased flexibility to request the Invoices Due report to display in portrait page orientation. With this enhancement, more transactions can be displayed on a single page, allowing you to review invoices due more easily.

The screenshot displays the 'Invoices Due Report' interface. The main area shows a table of transactions with columns: Supplier #, GL Acct, Entity Ref #, JRN, Trans. Date, Due Date, Comments, Balance Due, and Amt To Pay. The transactions are grouped by supplier, such as 'VAGER AUTO GLASS', 'ROY MISTRETTA', 'CARSON RUBEN', 'ARON SUPPLIER', 'PATRICIA POWERS', 'WHOLESALE MARINE', 'PACIFIC RV PARTS', 'SMITHS WELDING', and 'TRUE VALUE'. On the right side, the 'PREVIEW PARAMETERS' section includes dropdown menus for Corporation, Profit Center, Ending Supplier N., Through Due Date, Group by, Breakout Discount, Sort by, and Page Orientation. The 'Page Orientation' dropdown is highlighted with a callout box labeled 'New field', and its value is set to 'Portrait'.

To define the report to display in portrait page orientation, simply select **Portrait** in the new **Page Orientation** field in the Preview Parameters section.

*Note - By default, **Landscape** is selected in the **Page Orientation** field, but can be changed.*

Additional information

- The **GL Account** column on the report has been renamed the **GL Acct** column.
- The **Entity Reference #** column on the report has been renamed the **Entity Ref #** column.
- The **Journal** column on the report has been renamed the **JRN** column.



Miscellaneous Accounting enhancement

- When creating a check using the Check Details window, you can now display the Entity Search window by entering search criteria for an entity in the **Search** field and pressing the ENTER key.