

Motility Anywhere



Release Notes

Enhancements to MotilityAnywhere

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General Program Enhancements



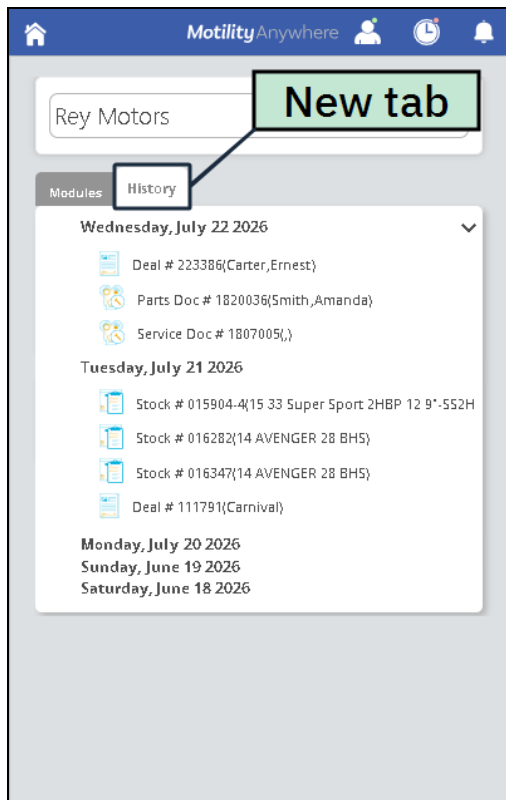
General System



General System

Access activity history for all modules in mobile view

Using a new tab in mobile view, you can easily review a history of your recent activity for all modules and access the corresponding records from a single location.



To display a history of your recent activity, tap the new History tab on the Home Page screen. A list of your recently accessed records from all modules is displayed by date. To access a record, simply tap the record on the History tab. The record displays in the corresponding module.



Miscellaneous General System enhancement

- The Navigation Pane for modules in MotilityAnywhere is now automatically expanded or collapsed when a module is accessed based on whether the Navigation Pane was expanded or collapsed when the module was last closed. For example, if you collapse the Navigation Pane in the CRM module using the '<' (**Collapse**) button, the next time you access the module, the Navigation Pane displays collapsed.



Reports



Reports

Report enhancement

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

CRM

- New Leads report. For more information, refer to page 24.



Dashboard



Dashboard

Dashboard enhancements

Enhancements have been made to the following Dashboard views. For more information about the enhancements to a view, refer to the corresponding topic.

Deal Desking

- Finance Deal Status. For more information, refer to page 15.

CRM

- CRM Employee Activity. For more information, refer to page 25.
- CRM Advertising Leads. For more information, refer to page 27.



Security Management



Security Management

New security permission available

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.

Parts & Service

- Parts & Service → **Allowed To Run Parts Obsolescence Processes**. For more information, refer to page 36.



Front-End Enhancements



Deal Desking



Deal Desking

Add lienholders using a simplified process

You can now add financial institutions as new entities directly from the Lien Payoff Bank Information window. Using this enhancement can save you time when setting up a lienholder for trade-in units by allowing you to create an entity record for the lienholder in fewer steps.

The screenshot shows the 'Lien Payoff Bank Information' window. On the left is a table of existing banks. The main area is titled 'Supplier Information' and contains a form for adding a new entity. A callout box points to the 'Add Supplier Name' button. At the bottom right are buttons for 'Modify Entity', 'Delete', 'Add', 'Save', and 'Cancel'.

Supplier #	Supplier Name	Delete
3773	Balance Trust	No
3666	Knight First Bank	No
3906	Elite Savings	No

Supplier Information

Supplier Number: 461199 | Supplier Name: Add Supplier Name | Dealer Location: Rey Motors

Primary | **Editing** | Insurance Claim

Address: | Address 2: | City: | State: |
ZIP: | Country: | Work Phone: | Work Extension: |
Email: | Fax: |

Modify Entity | Delete | Add | Save | Cancel

To add an entity record, simply click the **Add** button on the Lien Payoff Bank Information window, as normal. The information currently entered on the window is cleared, and the next available entity number is automatically entered in the **Supplier Number** field. Enter additional information for the financial institution as needed and click the **Save** button to save the record.



Deal Desking

Add comments for trade-in units

You can now enter comments for a trade-in unit on a deal to document special notes for the unit.

The screenshot shows the MotilityAnywhere software interface for a deal titled "Deal - 227131 | 1-Negotiating - No Deposit". The "Trades" tab is active, displaying "Trade Details" for a unit. The unit's details include: Stock Number 98555, Serial Number, Year 20, Make ADVENTURE, Model 37G, and Mileage 90062. A new field, "Trade Comments", is highlighted with a callout box labeled "New field" and contains the text "appliances functional". Below the trade details is the "Lien Payoff Information" section, which includes fields for Name, Address, City, State, Zip, Phone, and various monetary values like Payoff Amount, Trade Allowance, and Book Value. At the bottom of the interface, there are buttons for "Update to Inventory" and "Delete Trade", along with a footer containing "Total: \$21,207.12" and various utility buttons like "Pull From AppOne", "Send To AppOne", "Start Service RO", "Manage Docs", "Print Forms", "Alert", "Process Unit(s)", "Copy Deal/Quote", "Add Note", and "Save".

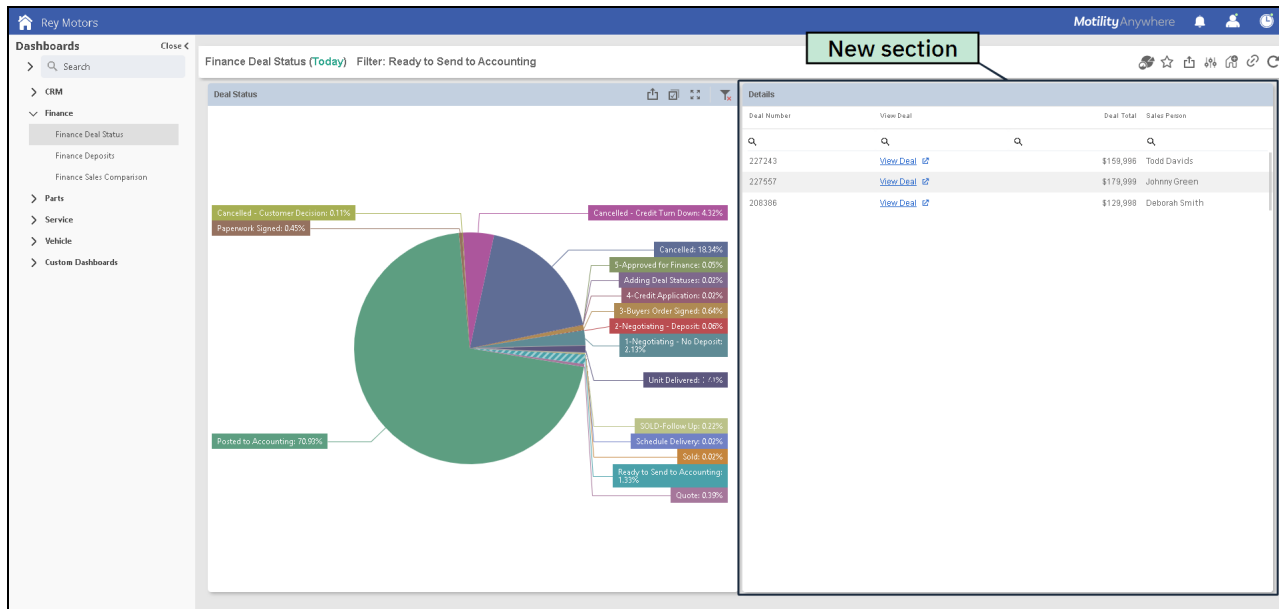
To add comments for a trade-in unit, simply enter the comments in the new **Trade Comments** field on the Trades tab on the Deal window. Then click the **Save** button to save the changes, as normal.



Deal Desking

Review additional deal details in Finance Deal Status view

Using a new section on the Finance Deal Status view, previously the KPI Finance Deal Status view, you can review more details for deals in specific deal statuses that are included in the view. In addition, you can now drill down to a deal directly from the view if you need to review full details for a deal included in the view.



When the Finance Deal Status view is first accessed, data for all deals included in the view displays in the new Details section. Click an area of the chart corresponding to a deal status in the Deal Status section to only display data for deals in the selected status. For example, click the area for the Posted to Accounting status in the chart to only display details for deals which have been posted to accounting.

The following columns display in the Details section.

- **Deal Number.** This column displays the deal number.
- **View Deal.** This column displays the *View Deal* link. Click this link to access the Deal window in the Deal Desking module on a new tab of the Internet browser, where you can review detailed information about the corresponding deal.
- **Deal Total.** This column displays the total dollar amount for the deal.
- **Sales Person.** This column displays the salesperson for the deal.



Unit Inventory



Miscellaneous Unit Inventory enhancements

- When a deal is completed using the Deal Desking module, the entry in the **Temp Tag #1** field on the Units tab on the Deal window is now automatically entered in the **Temporary Tag #** field in the Shared Unit Information section on the Unit Inventory window.
- The **Make** field and the **Model** field in the Unit section on the Unit Inventory screen now display above the **Manufacturer** field. When entries are made in the **Make** and **Model** fields and a manufacturer is defined for the make and model on the Settings screen, the manufacturer is automatically entered in the **Manufacturer** field, as normal.
- The **Export to Excel** button has been removed from the Unit Purchase Order List screen. To export information for unit purchase orders, you can search for a range of purchase orders on the Advanced Unit Search window, then click the **Export to Excel** button, as normal.



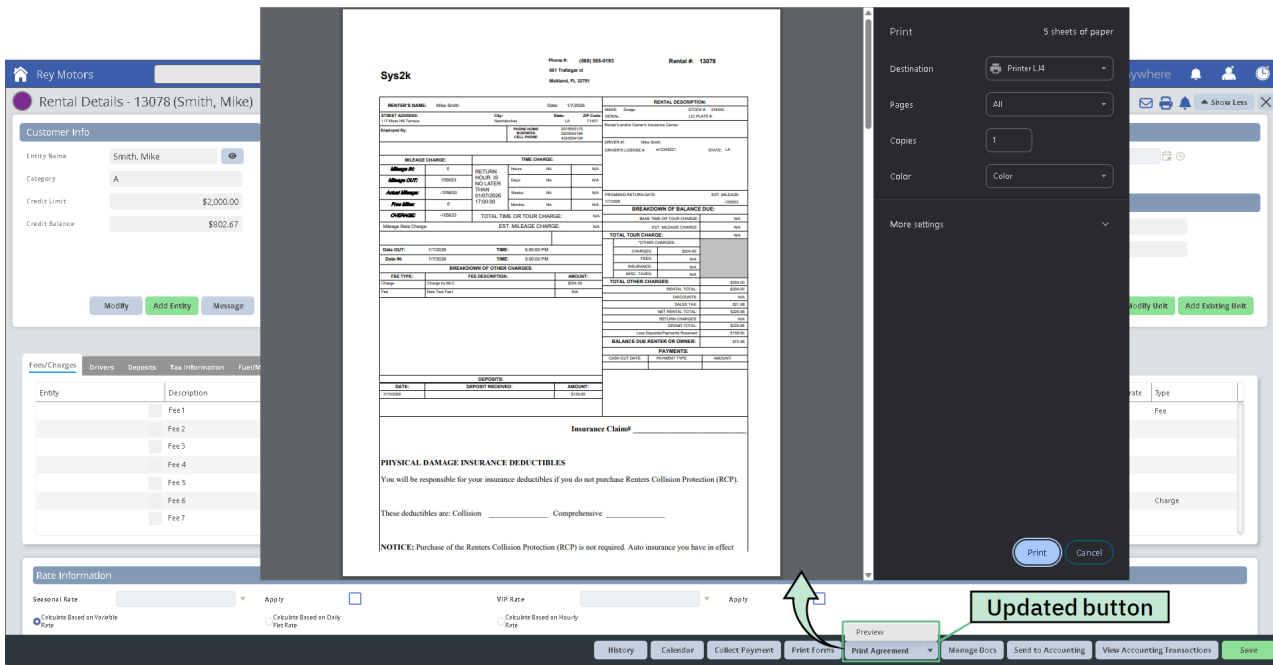
Rental



Rental

Print rental agreements more efficiently

You can now print rental agreements on the Rental Details window using fewer steps. To print a rental agreement, simply click the updated **Print Agreement** button on the Rental Details window to display the Print window, where printer options can be selected and the rental agreement can be printed, as normal.



If needed, you can still preview the rental agreement before printing. To preview the rental agreement, simply click the **▼** (Down Arrow) icon for the **Print Agreement** button and select the **Preview** option. The rental agreement is displayed in the Reports module, where the rental agreement can be reviewed, as normal.

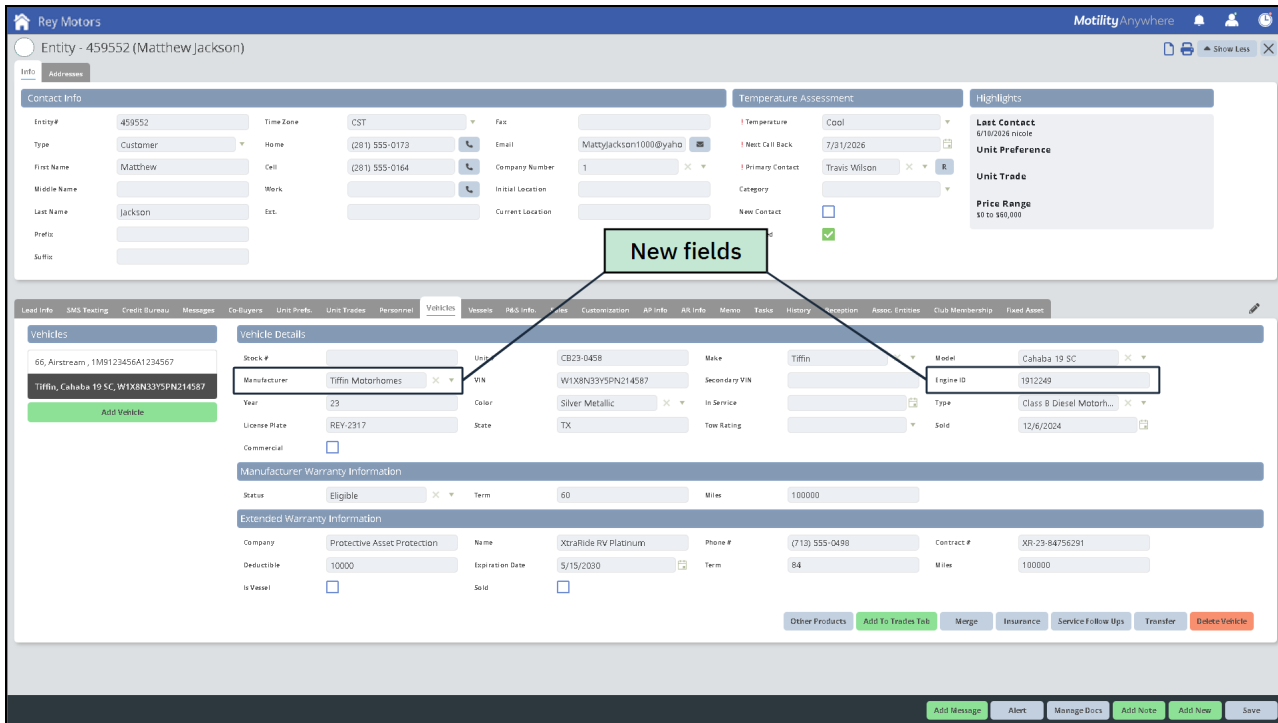


CRM



Define manufacturer and engine ID for units

You can now define the manufacturer and the engine ID for a unit directly in the entity record. Once the manufacturer and engine ID are defined, the information is automatically entered in the new **Manufacturer** field and the new **Engine ID** field on the Service Invoice window in the Parts & Service module when the unit is added to a repair order. With these enhancements, advisors can reference more detailed information regarding the specific unit on a repair order, which can be especially useful when researching the specific parts required for the repairs.



To define the manufacturer for a unit, simply enter the manufacturer in the **Manufacturer** field on the Vehicles tab on the Entity window. To define the engine ID for a unit, enter the engine serial number in the **Engine ID** field on the Vehicles tab. To save changes, click the **Save** button on the Entity window, as normal.

Note - For more information about reviewing the manufacturer and engine ID for units on repair orders in the Parts & Service module, refer to page 34.

Additional information

- To support this enhancement, fields in the Vehicle Details section on the Vehicles tab on the Entity window have been rearranged.

Access entity and unit information in a new tab

You can now display an entity record or a unit record in a separate Internet browser tab directly from the Task window. With this enhancement, you can easily switch between reviewing entity or unit details and task information with minimal navigation.

The screenshot shows a 'Task' window with a 'Details' tab. The subject is 'Call David Johns'. The form includes fields for Priority (0), Status (Not Started), Private (checkbox), Created By (Anderson, Charles), Assigned To (Anderson, Charles), Profit Center, Team, Department, System / Module, Create Appt (checkbox), Start Date, Due Date (7/15/2026 12:00 AM), Entity Name (Johns, David), Entity # (136715), Phone ((686) 555-0146), Stock # (0123456789), Current Lot (Co 2 Loc. 1-5), New Lot, Document Number, Notify Email, Notify on Completion (checkbox), Notified (checkbox), Complete (checkbox), Completed Date, and Completed By. At the bottom, there are buttons for 'View Entity' (with a new tab icon), 'View Stock #' (with a new tab icon), 'Complete', 'Delete', and 'Save'. A callout box labeled 'Updated buttons' points to the 'View Entity' and 'View Stock #' buttons.

Simply click the **View Entity** button on the Task window to display the Entity window in the CRM module for the entity in a separate Internet browser tab. Similarly, click the **View Stock #** button to display the Unit Inventory window in the Unit Inventory module for the unit in a separate Internet browser tab.

Additional information

- The **View Entity** button and the **View Stock #** button now display with the (New Tab) icon to clearly indicate that information for the entity or unit displays in a new Internet browser tab.



Include Email addresses on the New Leads report

You can now define the New Leads report to display the Email addresses for the prospects included on the report. Using this enhancement can be especially useful for easily referencing the Email contact information to utilize for campaigns used to contact new leads.

The screenshot shows the 'New Leads Report' interface. The main table displays lead information with columns: Name, Telephone, Contact Date, Deal Status, Adv. Lead, Campaign, Lead Type, Current Sales Rep, and New Contact. Two lead entries are visible, with their email addresses highlighted in a green box labeled 'Email addresses included'. The 'Preview Parameters' sidebar on the right contains various filters, with the 'Show Email' field set to 'Yes', highlighted by another green box labeled 'New field'. Below the table is a summary section titled 'NEWLEADS REPORT TOTALS' with sub-tables for 'Total Leads-By Advertising Lead', 'Total Leads-By Deal Status', 'Total Leads-By Lead Type', and 'Total Leads-By Team Number'.

To include the Email addresses on the report, simply select **Yes** in the new **Show Email** field in the Preview Parameters section. Once all criteria is defined, click the **Run** button to request the report, as normal.

Note - The Email address for a lead is only included on the report if an Email address is defined in the entity record for the lead.




CRM

Review employee activity data using an updated CRM Employee Activity Dashboard view

The CRM Employee Activity view, previously the KPI CRM Employee Activity view, has been updated to help you monitor employee activity more easily and in more detail. You can now analyze data in the view based on multiple date ranges, additional employee statistics can be reviewed for multiple employees or for individual employees in several new sections, and additional task data can be accessed quickly with new links.

The screenshot displays the CRM Employee Activity Dashboard for 'Rey Motors'. The main view is titled 'CRM Employee Activity (All Dates)'. It features an 'Active Employee List' table with columns for Company #, Profit Center, Employee Number, Employee Name, Total New Lead Count, Total Activity Count, Prospect Name, Tasks Created, Tasks Completed, Task % Complete, and Tasks Not Completed. A 'New section' callout points to the 'Tasks Completed' column. Below the main table, there are three new sections: 'Leads', 'Task Created', and 'Task Completed'. A 'Task Totals' summary section on the right shows 'Total Tasks Created' (5), 'Total Task Completed' (1), and 'Total Tasks Not Completed' (1). A 'New sections' callout points to the 'Task Created' and 'Task Completed' sections. The 'Task Created' section contains a table with columns for Entity, Created Date, Task, and Date Created. The 'Task Completed' section contains a table with columns for Task, Date Completed, and Task. The 'Task Not Completed' section is currently empty, displaying 'The grid has no data.'

On this view, you can now define the date range for which data displays. Click the  (Dashboard Parameters) icon to access the Dashboard Parameters window, where you can select the date range for which employee activity data should display. Once the date range is defined, the date range displays in the title of the view for easy reference.

In addition, multiple new sections display on this view for you to review additional details for the employee performance metrics.

The table in the new Task Totals section displays the total number of tasks created on the current date, tasks completed on the current date, and tasks due by the current date that have been not completed for the employees included in the view.



Additional new sections are described below and can be filtered to only display data for a selected employee. When the view is first accessed, the data in these sections displays for all employees. Simply click a row for an employee in the Active Employee List section to only display data for the specific employee in the following new sections.

- **Leads.** The table in this section displays details for the leads for the selected employee, such as the entity name for the lead, the entity number, and the date the lead was added. Click a link in the **Entity** column of this section to access the corresponding entity record in the CRM module.
- **Task Created.** The table in this section displays details for tasks that were created for the selected employee, such as the task name and the date the task was added.
- **Task Completed.** The table in this section displays details for tasks completed by the selected employee, such as the task name and the date the task was completed.
- **Task Not Completed.** The table in this section displays details for tasks that were not completed by the assigned due date by the selected employee, including the task name and the date the task was added.

Click a link in the **Task** column in the new tables to access the Task window, where you can review details about the corresponding task.

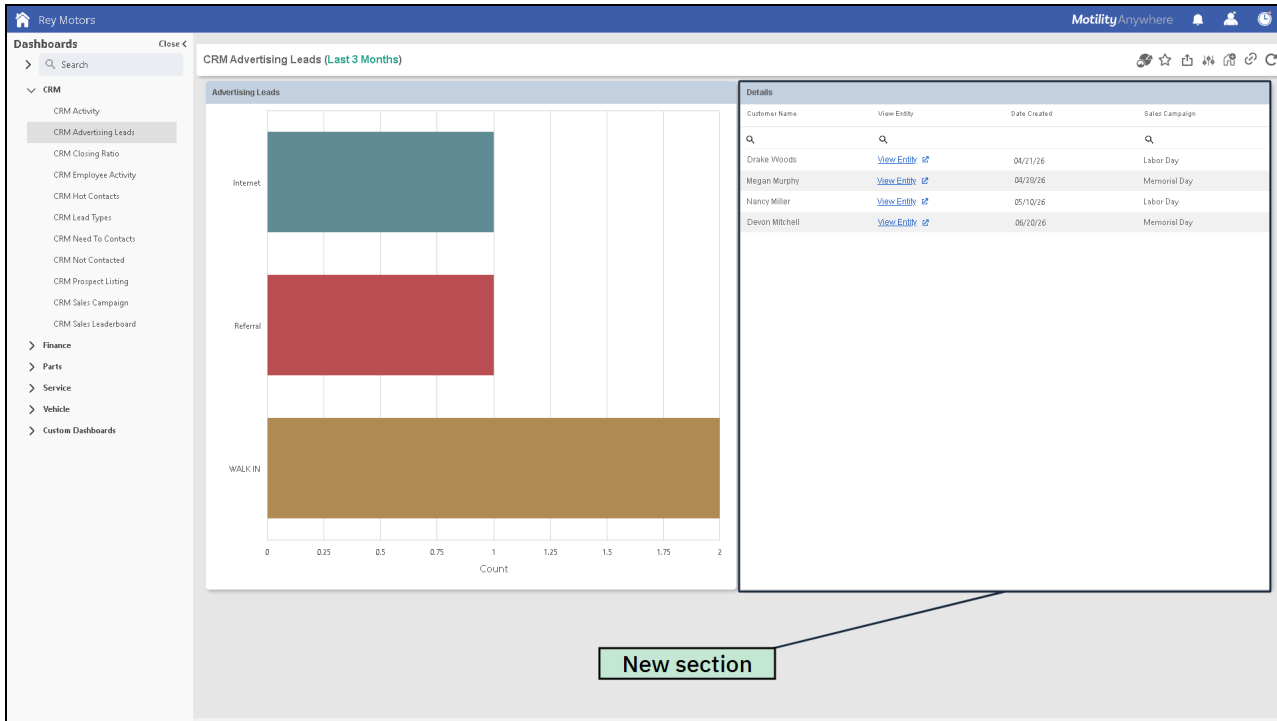
Additional information

- The **Clock Mode** column, the **Punch Time** column, and the **Minutes** column have been removed from the KPI CRM Employee Activity view.

CRM

Updated Dashboard view for reviewing advertising leads

The CRM Advertising Leads Dashboard view, previously the KPI CRM Advertising Leads Dashboard view, has been enhanced to include more details for the specific leads that are included in the view. New links are also available for you to access the entity records for leads directly from the view if you need to review detailed information for the leads.



The new Details section displays a table with key information for each lead, including the customer name, the date the customer's entity record was created, and the sales campaign associated with the lead. In addition, you can click the *View Entity* link for a lead to display the corresponding entity record in a new tab.

When the CRM Advertising Leads view is first accessed, information for all leads included in the view displays in the Details section. Click a bar in the chart corresponding to lead type in the Advertising Leads section to only display data for leads of the selected lead type. For example, click the bar for the Internet lead type to only display details for Internet leads.



CRM

Miscellaneous CRM enhancement

- When a deal is completed using the Deal Desking module, the entry in the **Temp Tag #1** field on the Units tab on the Deal window is now automatically entered in the **License Plate** field on the Vehicles tab on the Entity window.



Fixed Operations Enhancements

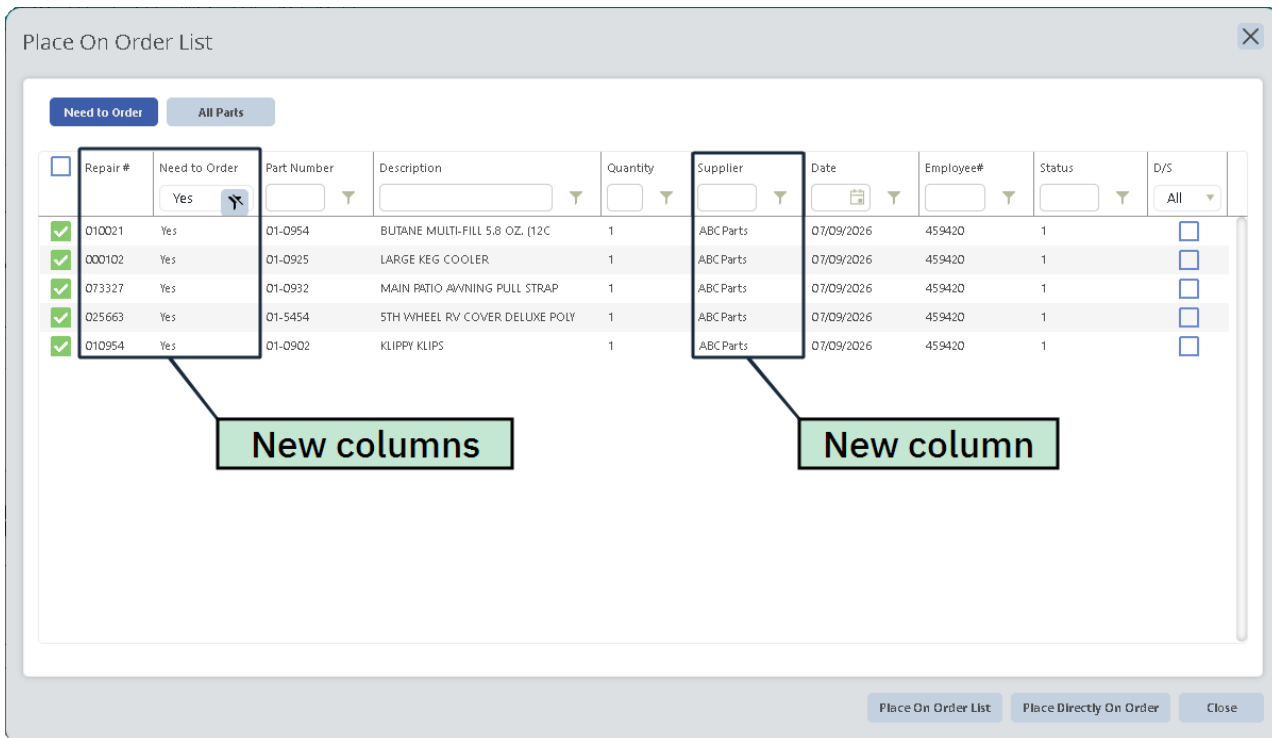


Parts & Service



Easily identify parts to order for a repair

You can now determine parts to order for a repair more easily using new columns on the Place On Order List window. The repair order line number for each part on the window displays in a new column, which is especially useful for distinguishing the parts for specific jobs when parts on the repair order will be ordered incrementally. In addition, new columns have been added to the window for you to identify at a glance whether parts require an order and the supplier from which to order the parts.



The following columns have been added to the Place On Order List window.

- **Repair #.** This column displays the repair order line number corresponding to the part.
Note - This column only displays when the Place On Order List window is accessed from a service invoice.
- **Need to Order.** This column displays whether the part is in stock or should be ordered. The entries in this column cannot be changed.
- **Supplier.** This column displays the default supplier for the part.

To order parts, simply select the check boxes for the parts and click the **Place On Order List** button or the **Place Directly On Order List** button, as normal.



Additional information

- The **Needs Order** button has been renamed the **Need to Order** button.
- The **Order** column has been renamed the **Need to Order** column.
- When the **Need to Order** button or the **All Parts** button is clicked, the button now displays blue.



Parts & Service

Review and update complaint, cause, and correction information more easily

Using a new window, you can now review the full complaint, cause, and correction information for a repair order more easily. Previously, you could scroll through the complaint, cause, and correction information on the Service Invoice window to review extensive entries. Now, the complete entries from the **Complaint** field, the **Cause** field, and the **Correction** field can be easily reviewed in an enlarged display on the new Complaint Cause Correction window.

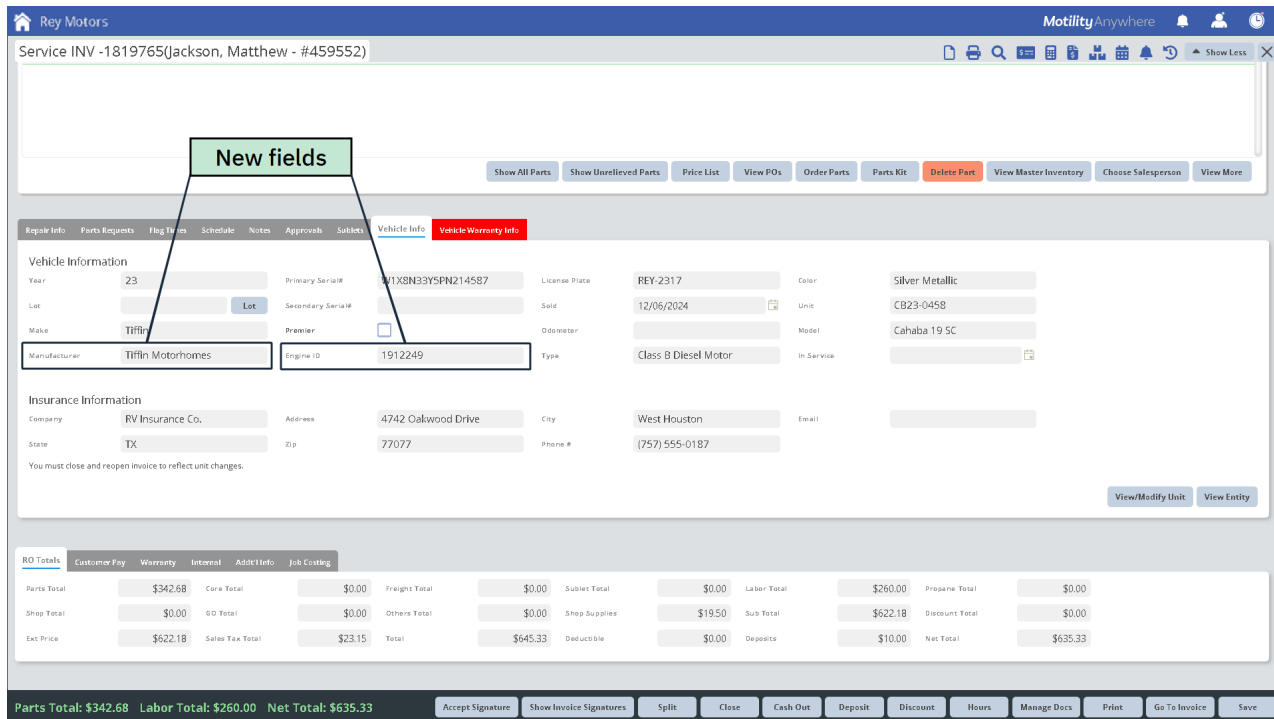
To display the Complaint Cause Correction window, simply click the new *Cause* link or the new *Correction* link on the Repair Info tab on the Service Invoice window. Using this window, you can review the complete complaint, cause, and correction information in an easy-to-read format. If needed, you can enter additional information in the **Cause** field and the **Correction** field.

To close the window, click the **View Less** button. Changes made to the **Cause** field and the **Correction** field are automatically entered in the corresponding fields on the Service Invoice window. Click the **Save** button on the Service Invoice window to save the changes, as normal.



Review the manufacturer and the engine ID for units on repair orders

You can now more easily determine the manufacturer and the engine ID for a unit directly in the repair order. Previously, you were required to access the unit inventory record for a unit in the Unit Inventory module to review the manufacturer and engine ID for the unit. Now, you can reference the manufacturer and the engine ID directly on the repair order, which can be especially useful when researching the specific parts required for the repairs.



To review the manufacturer and engine ID for a unit, simply access the Vehicle Info tab on the Service Invoice window. The name of the manufacturer displays in the new **Manufacturer** field, and the serial number for the engine displays in the new **Engine ID** field.

*Note - The manufacturer and engine ID for a unit are defined using the new **Manufacturer** and **Engine ID** fields on the Entity window in the CRM module. For more information about defining the manufacturer and the engine ID for a unit, refer to page 21.*

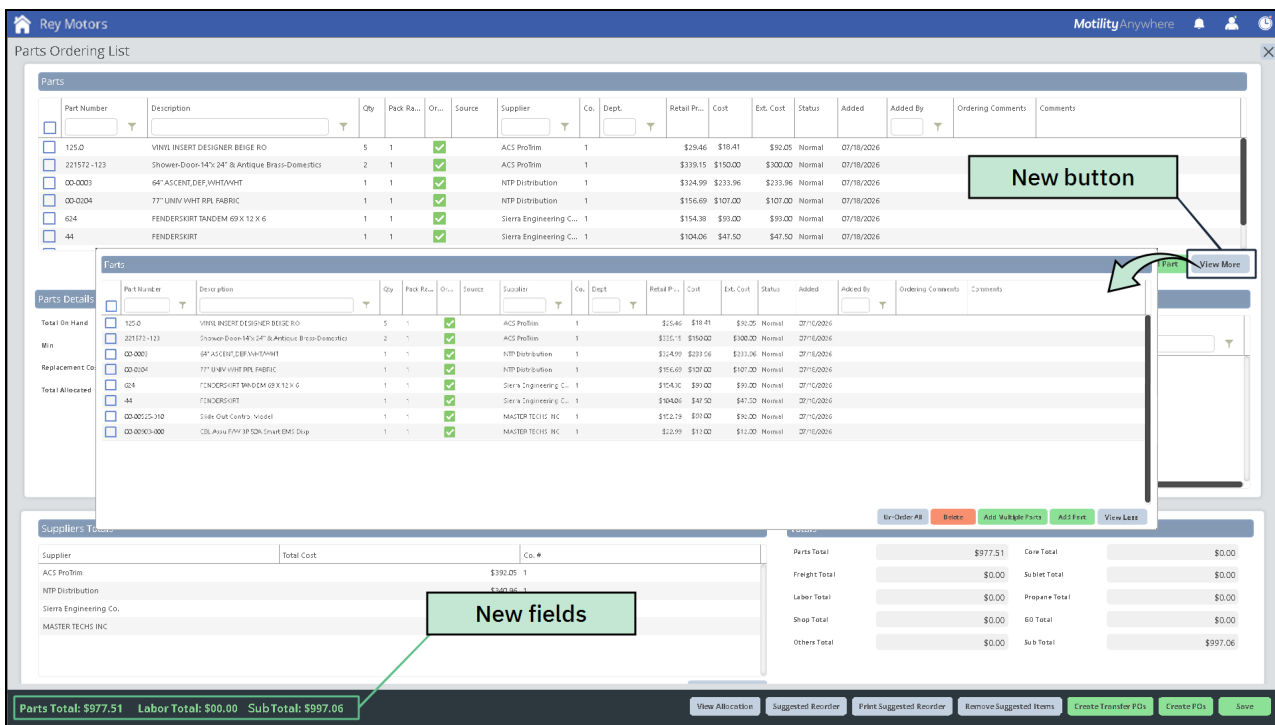
Additional information

- To support this enhancement, fields in the Vehicle Information section on the Vehicle Info tab on the Service Invoice window have been rearranged.



Easily review the full parts list on parts orders

Using the new Parts window, you can more easily review and update the full list of parts on an order with a large number of parts. Previously, you were required to scroll through a parts list on the Parts Ordering List window to review and update parts on a large order. With this enhancement, the parts can be listed in an enlarged display for easier review directly from the Parts Ordering List window. In addition, new fields are available on the Parts Ordering List window for you to review the parts total, the labor total, and the subtotal for a parts order at a glance.



To display the Parts window, simply click the new **View More** button in the Parts section of the Parts Ordering List window. The Parts window displays, where you can review and update the parts as needed. Once changes are made, click the **View Less** button to close the window and save the changes.



Parts & Service

Delete obsolete parts more easily

You can now delete obsolete parts using a new link directly on the Parts and Service menu. Previously, you were required to navigate to a part record to delete obsolete parts. Now, you can delete obsolete parts from any screen where the Parts and Service menu displays.

The screenshot shows the MotilityAnywhere interface with the 'Parts Invoicing List' table. The left-hand menu is expanded to 'Parts Maintenance', where the 'Delete Obsolete Parts' link is highlighted with a green box and labeled 'New link'. A modal window titled 'Delete Obsolete Parts' is open, displaying the following text:

This process will delete all parts that are marked obsolete, have TOH, TOO, and TOA all equal to 0, and have never had a transaction for that part.

If the part has had transactions in the past it will mark the part as Deleted, but will still be in the system.

The modal window has 'Process' and 'Cancel' buttons.

To delete obsolete parts, simply click the new *Delete Obsolete Parts* link in the Parts Maintenance section of the Parts and Service menu. The Delete Obsolete Parts window displays. Click the **Process** button to delete all parts that have been defined as obsolete; have TOH, TOO, and TOA values equal to zero; and have never had any transactions, as normal.

New security permission

- To grant access to define parts as obsolete and to delete obsolete parts, select the **Setting** check box for the Parts & Service → **Allowed To Run Parts Obsolescence Processes** security permission on the Permissions window.



Miscellaneous Parts & Service enhancement

- When a payment on account is received on the Payment Details window, the comment from the related transaction is now automatically entered in the **Comments** column, reducing the need to reenter transaction details. If multiple transactions share the same entity reference number and are combined into one line, the comment from the earliest transaction is automatically entered in the **Comments** column.



Business Office Enhancements



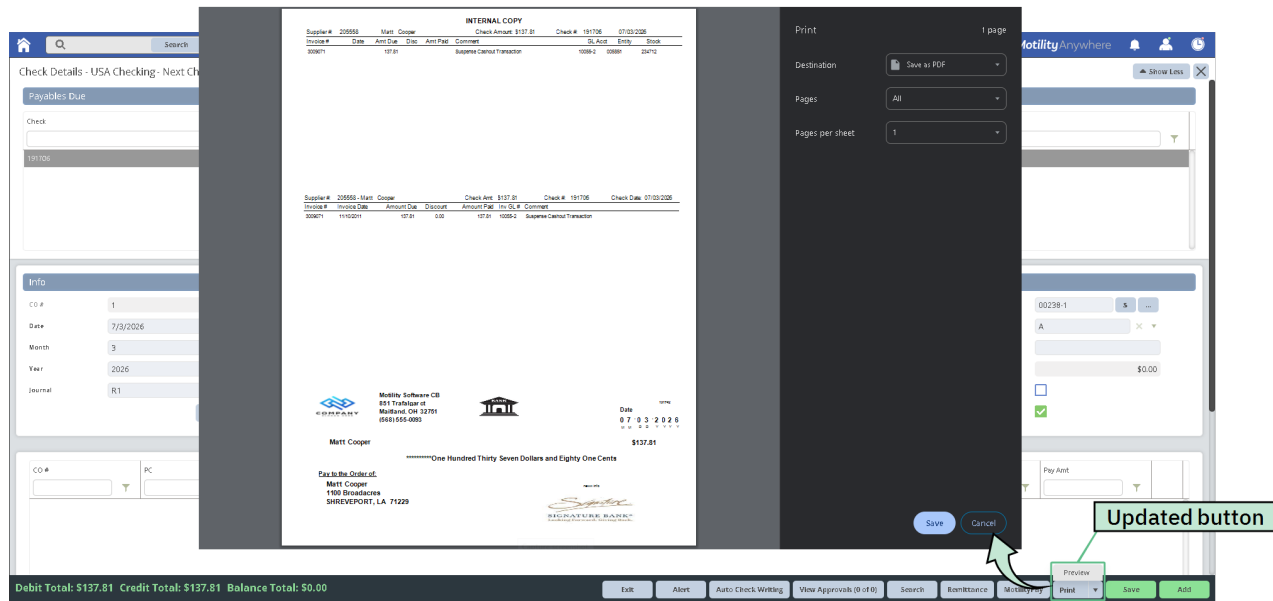
Accounting




Accounting

Print checks more efficiently

You can now print checks on the Check Details window using fewer steps. To print a check, simply click the updated **Print** button on the Check Details window to display the Print window, where printer options can be selected and the check can be printed, as normal.



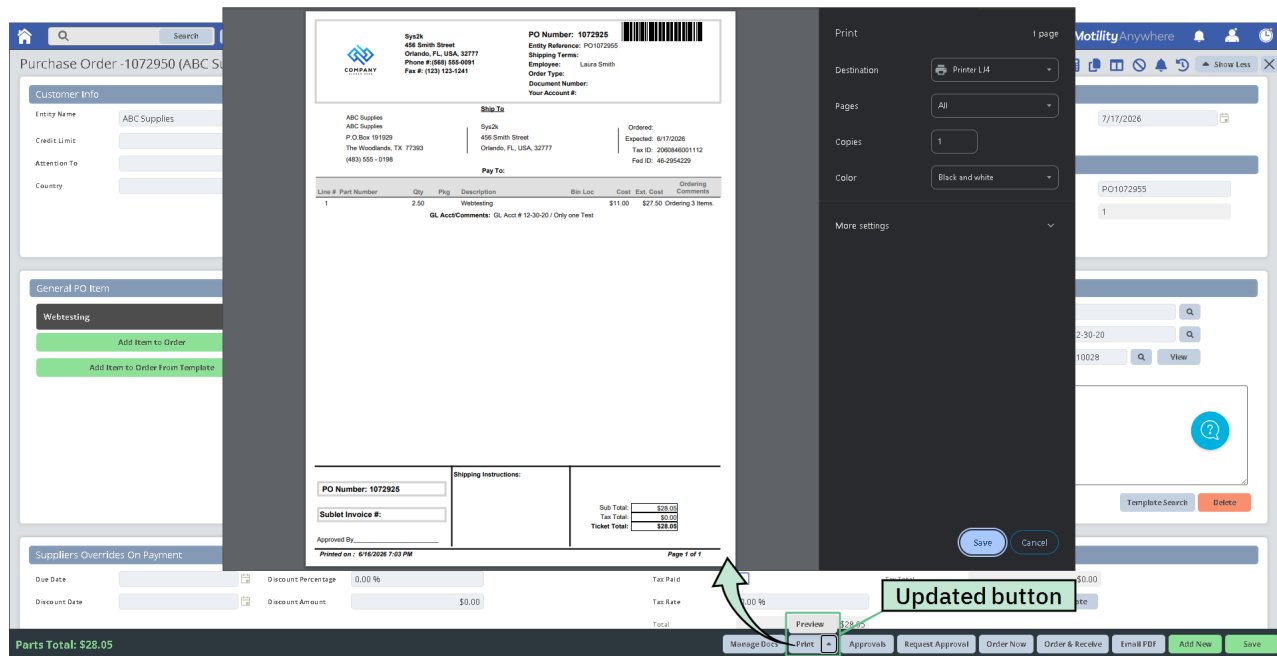
If needed, you can still preview the check before printing. To preview the check, simply click the  (Down Arrow) icon for the **Print** button and select the **Preview** option. The check is displayed in the Reports module, where the check can be reviewed, as normal.




Accounting

Print purchase orders more efficiently

You can now print purchase orders on the Purchase Order window using fewer steps. To print a purchase order, simply click the updated **Print** button on the Purchase Order window to display the Print window, where printer options can be selected and the purchase order can be printed, as normal.



If needed, you can still preview the purchase order before printing. To preview the purchase order, simply click the  (Up Arrow) icon for the **Print** button and select the **Preview** option. The purchase order is displayed in the Reports module, where the purchase order can be reviewed, as normal.

Additional information

- The **Cancel** button has been removed from the Purchase Order/Receiving Control Center window.



Miscellaneous Accounting enhancements

- In the Audit Reports section of the Reports module, the link used to access the All Audit Accounting report has been renamed the *All Audit Reports - Exception Findings* link to more clearly indicate the purpose of the link.
- The links in the Audit Reports section of the Reports module now display in alphabetical order.
- When a payment on account is received on the Payment Details window, the comment from the related transaction is now automatically entered in the **Comments** column, reducing the need to reenter transaction details. If multiple transactions share the same entity reference number and are combined into one line, the comment from the earliest transaction is automatically entered in the **Comments** column.