MotilityAnywhere

Release Notes

Enhancements to MotilityAnywhere

v.4.5.20262.21530

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v.4.5.20262.21530

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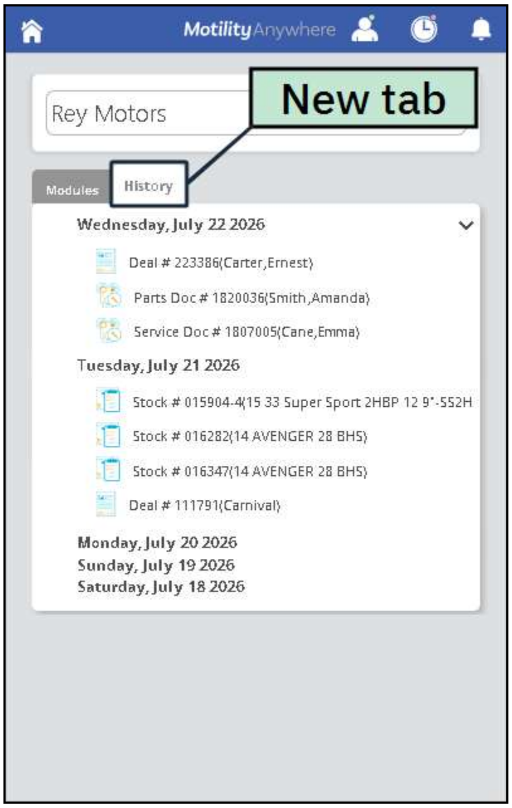
Table of Contents

General Program Enhancements

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

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 29.

Dashboard

New Dashboard views available

The following Dashboard views have been added in the Dashboard module. For more information about a view, refer to the corresponding topic.

Parts & Service

- Parts Daily Sales Closed. For more information, refer to page 46.
- Parts Daily Sales In Process. For more information, refer to page 48.

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 17.

CRM

- CRM Employee Activity. For more information, refer to page 30.
- CRM Not Contacted. For more information, refer to page 32.
- CRM Advertising Leads. For more information, refer to page 34.

Parts & Service

- Parts Daily Sales. For more information, refer to page 50.
- R.E.C.T High Labor. For more information, refer to page 51.
- Service Advisor Information. For more information, refer to page 53.
- Service Mechanic Scoreboard. For more information, refer to page 55.
- Service Comparison. For more information, refer to page 57.

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.

Deal Desking

- Finance → **Allowed to Cancel Old Quotes and Deals**. For more information, refer to page 15.

Parts & Service

- Parts & Service → **Allowed To Run Parts Obsolescence Processes**. For more information, refer to page 43.

Accounting

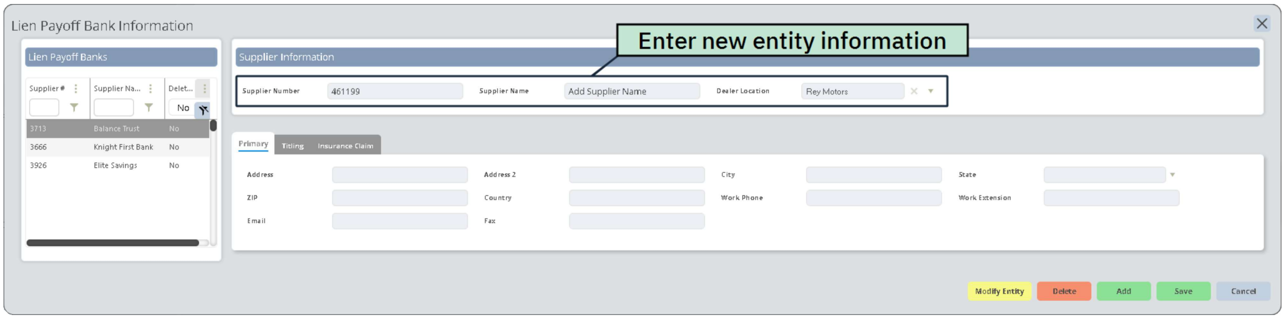
- Accounting → **Allowed To Export NVM Spader Data**. For more information, refer to page 63.

Front-End Enhancements

Deal Desking

Add lienholders using a simplified process

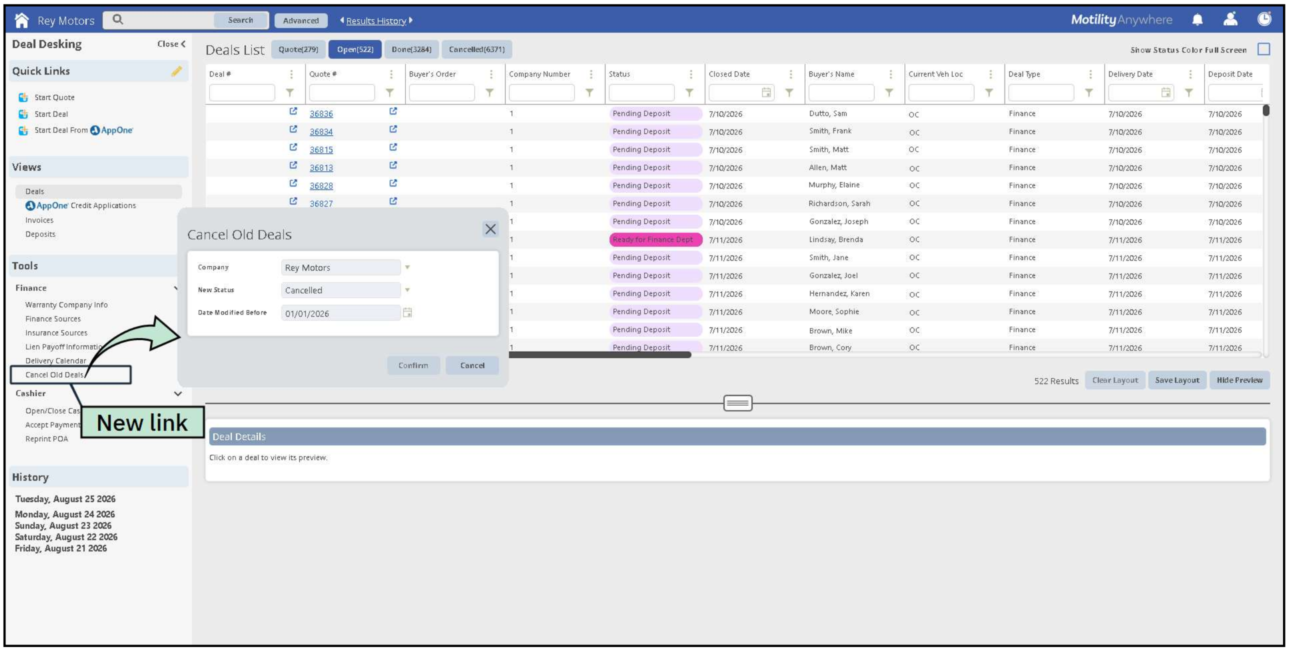
You can now add financial institutions as new entities directly from the Lien Payoff Bank Information window. Using this enhancement can save you time when setting up a lienholder for trade-in units by allowing you to create an entity record for the lienholder in fewer steps.



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.

Cancel multiple aged quotes and deals at once

Using a simple process, you can now assign a canceled status to multiple quotes and deals that have not been modified since a specified date at one time.



To assign a canceled status to aged quotes and deals, simply click the new *Cancel Old Deals* link in the Deal Desking → Tools → Finance section. The new Cancel Old Deals window displays.

In the **New Status** field, select the canceled status to apply to the quotes and deals. Then, enter a date in the **Date Modified Before** field. Only quotes and deals that have not been modified since the entered date are included in the cancellation process. Click the **Confirm** button to cancel the quotes and deals.

The new Confirm Cancellation window displays. Click the **Confirm** button to confirm the cancellation.

Additional information

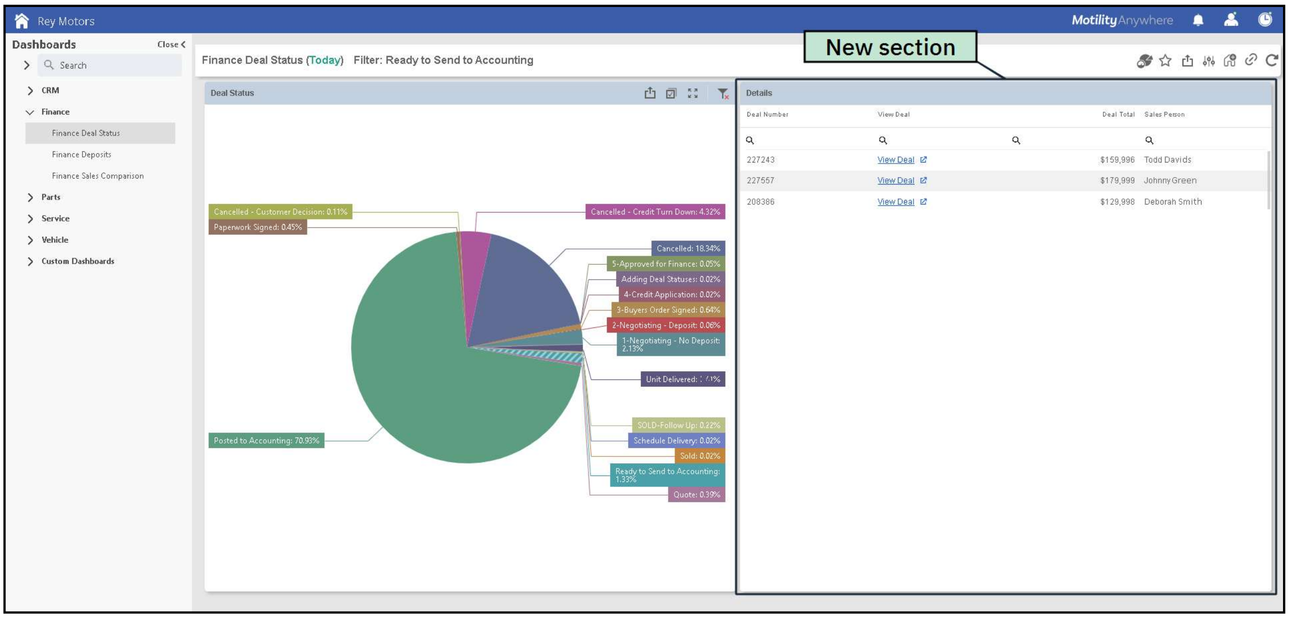
- The new "Batch Cancel" literal now displays in the **NewValue** column on the History tab on the Deal window for quotes and deals that were canceled using the Cancel Old Deals window.

New security permission

- To grant an employee access to the Cancel Old Deals window, select the **Setting** check box for the Finance → **Allowed to Cancel Old Quotes and Deals** security permission on the Permissions window.

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.



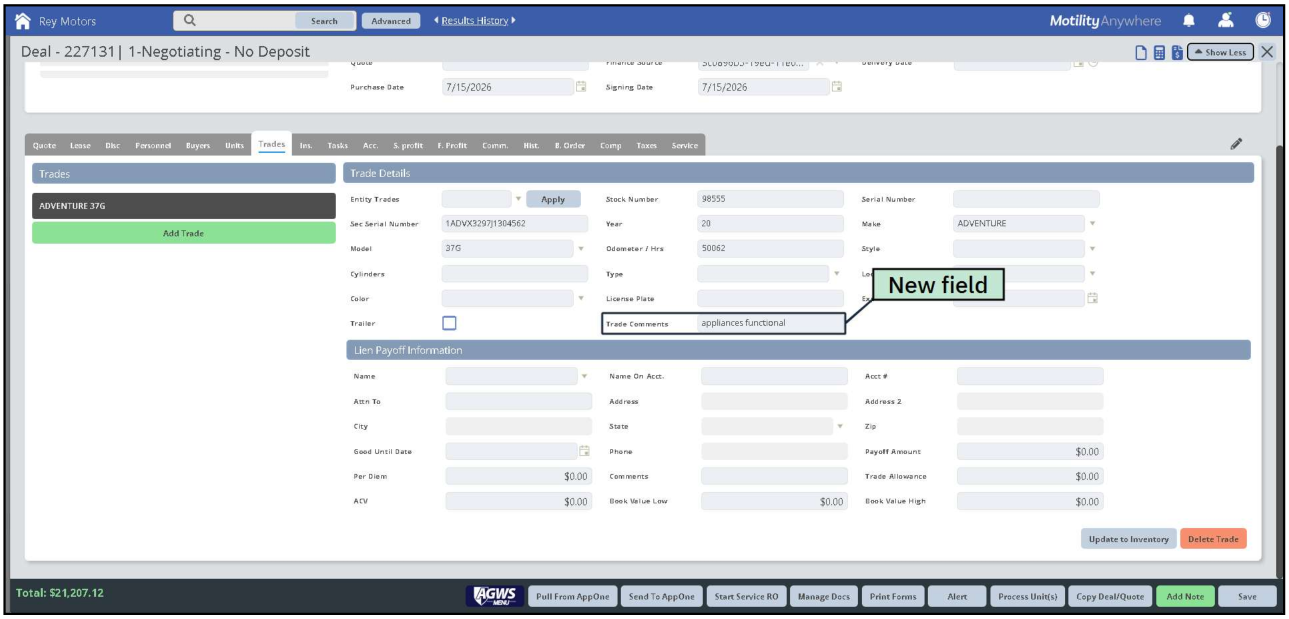
When the Finance Deal Status view is first accessed, data for all deals included in the view displays in the new Details section. Click an area of the chart corresponding to a deal status in the Deal Status section to only display data for deals in the selected status. For example, click the area for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

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.



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.

Unit Inventory

Miscellaneous Unit Inventory enhancements

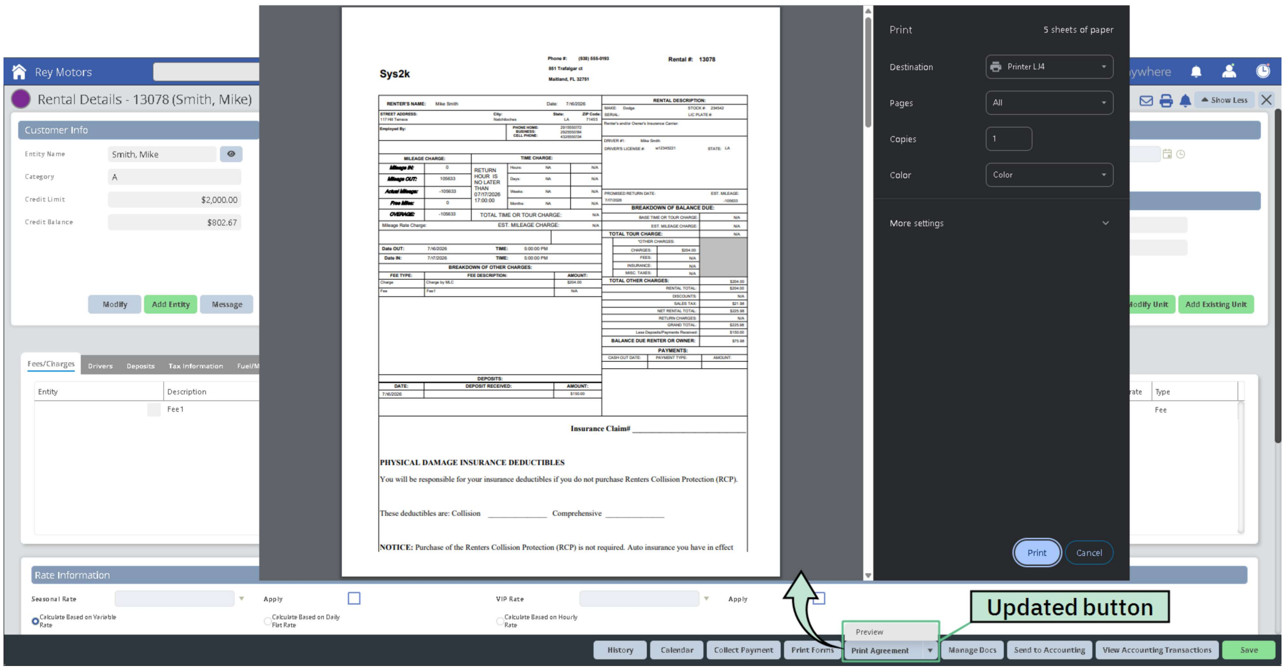
- When a deal is completed using the Deal Desking module, the entry in the **Temp Tag #1** field on the Units tab on the Deal window is now automatically entered in the **Temporary Tag #** field in the Shared Unit Information section on the Unit Inventory window.
- The **Make** field and the **Model** 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, and 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.

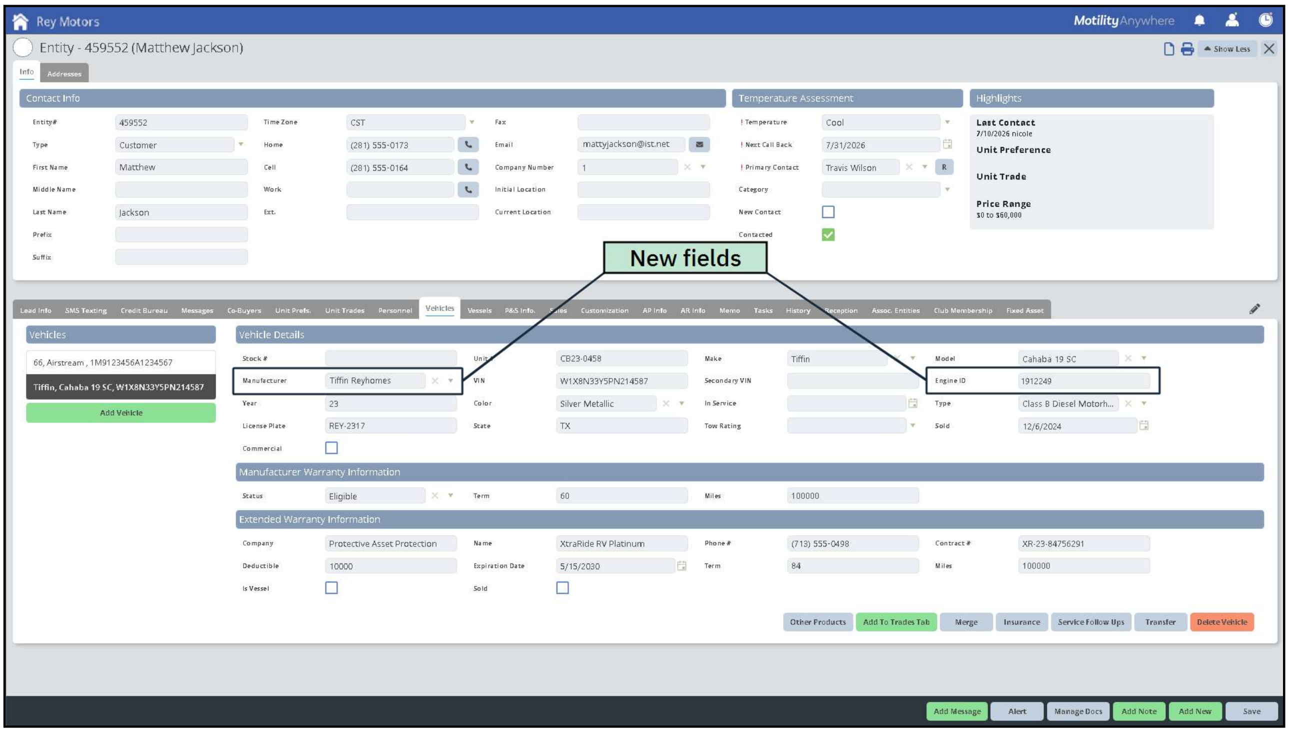


If needed, you can still preview the rental agreement before printing. To preview the rental agreement, simply click the ▾ (Down Arrow) icon for the **Print Agreement** button and select the **Preview** option. The rental agreement is displayed in the Reports module, where the rental agreement can be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

CRM

Define the manufacturer and engine ID for units

New fields are available in entity records for you to define the manufacturer and the engine ID for a unit directly in the records. Once the manufacturer and engine ID are defined, the information is automatically entered in new fields on the Service Invoice window in the Parts & Service module when the unit is added to a repair order. With these enhancements, you 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, as normal.

When the unit is added to a repair order in the Parts & Service module, the manufacturer and engine ID for the unit are automatically entered in the new **Manufacturer** field and the new **Engine ID** field on the Service Invoice window.

Note - For more information about reviewing the manufacturer and engine ID for units on repair orders in the Parts & Service module, refer to page 41.

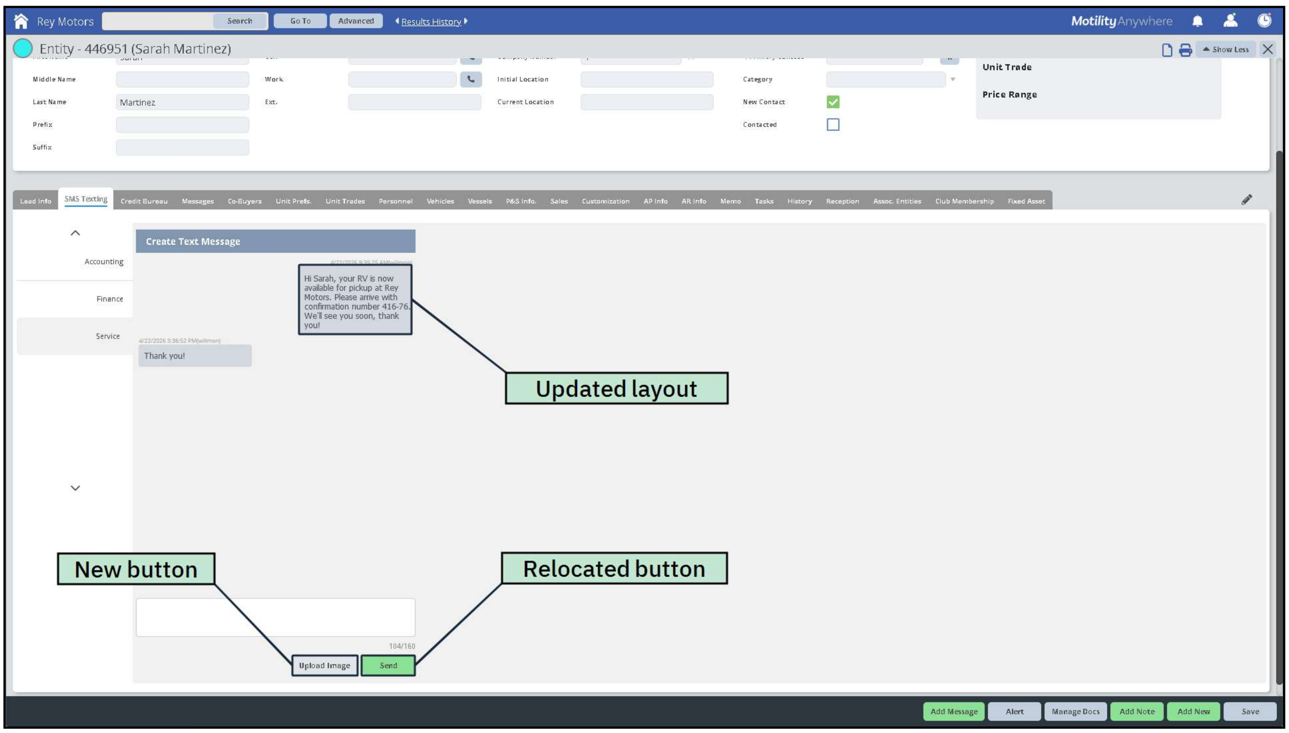
Additional information

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

Updated SMS Texting tab on entity records

Multiple enhancements are now available for the SMS Texting tab on the Entity Record screen to help you communicate using text messages more easily.

Included in these enhancements, the unlabeled **Message** field now displays at the bottom of the screen and remains visible while reviewing message history, allowing you to enter a text message whenever needed without scrolling. In addition, you can now attach images to text messages to help you more effectively communicate information. To attach an image, simply click the new **Upload Image** button to display a window where an image can be selected.

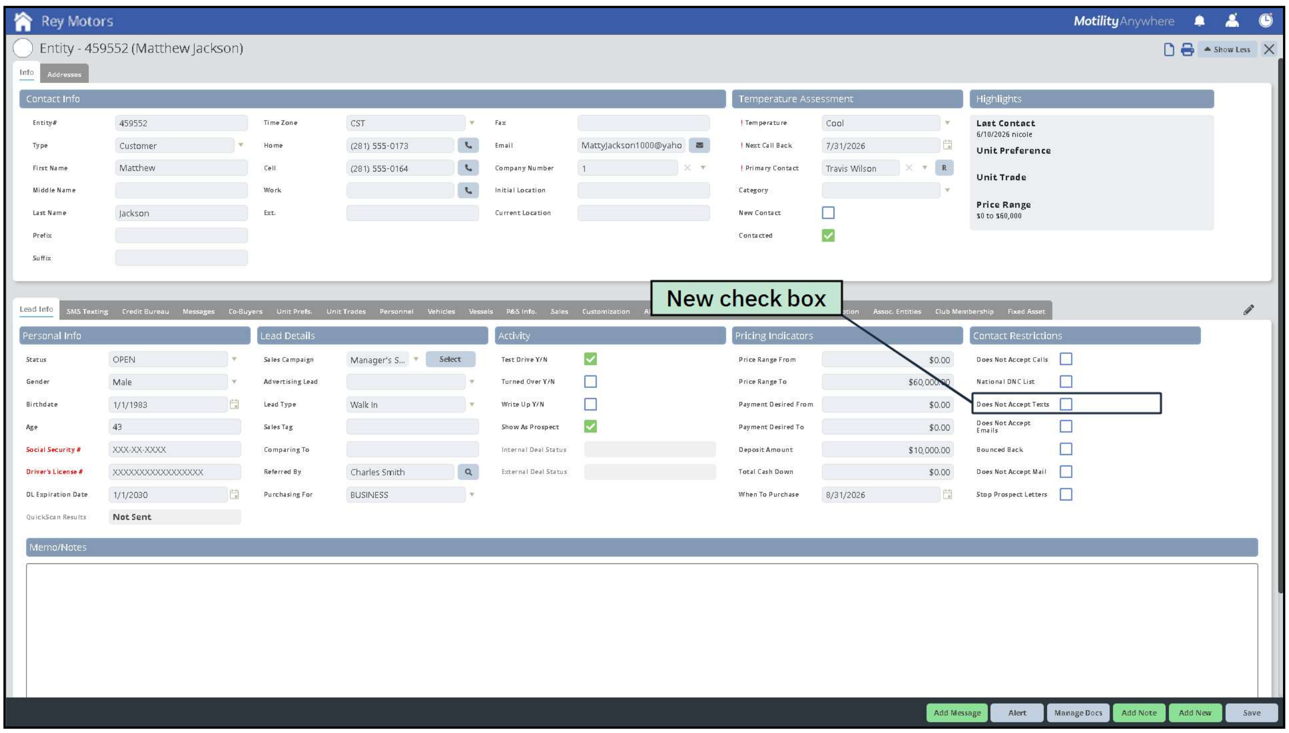


The following additional enhancements are available for the SMS Texting tab.

- When the SMS Texting tab is displayed, the cursor is now entered in the **Message** field, allowing you to begin typing a message immediately.
- Up to 160 characters can now be entered in the **Message** field.
- Message history now displays with the most recent messages displayed directly above the **Message** field. In addition, older messages can be displayed by scrolling up.
- Messages now display in a simplified bubble layout for improved readability.
- The **Send** button has been relocated below the **Message** field and now displays with a green background.

Define contact restrictions for SMS texting for an entity

You can now define whether an entity has requested to not be contacted by SMS text messages directly in the entity record. To allow you to indicate whether an entity permits contact using text messages, a new check box is available in the Contact Restrictions section on the Lead Info tab on the Entity window. In addition, the existing check boxes used to define contact preferences in the Contact Restrictions section have been rearranged to display in a more intuitive layout.



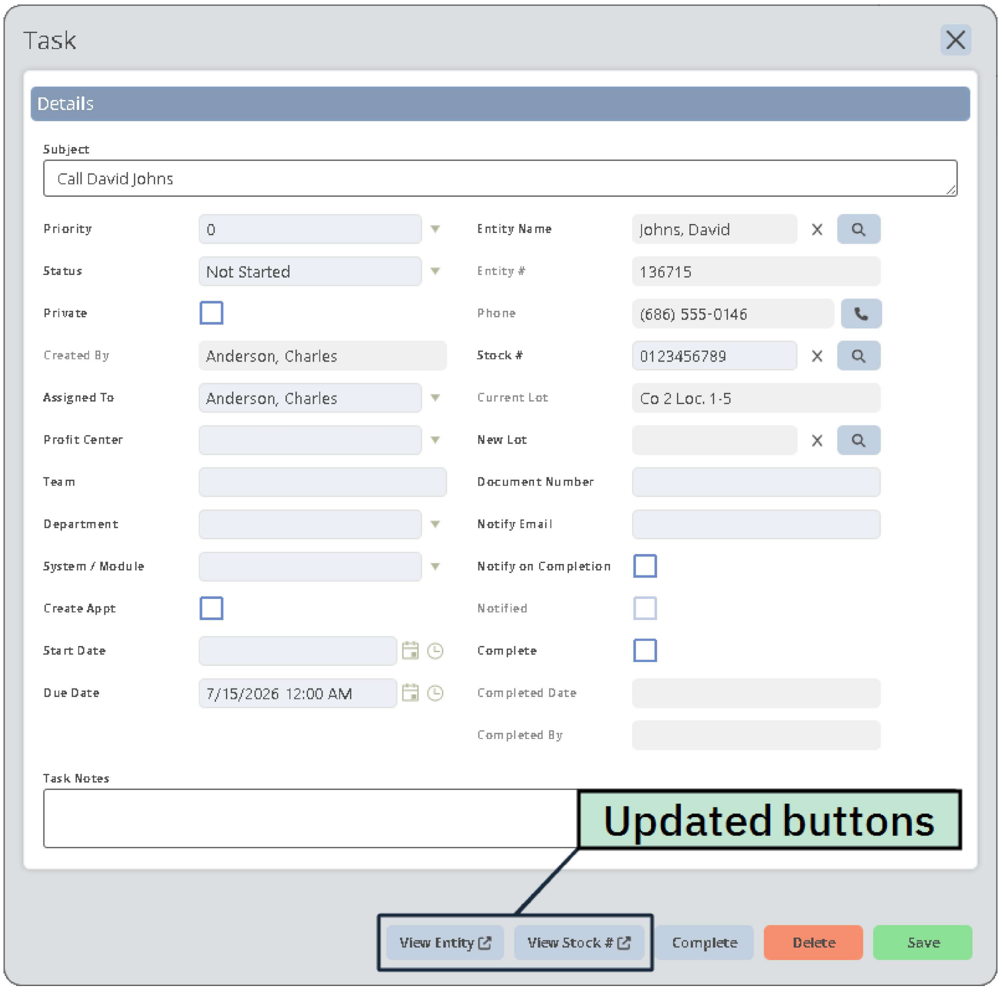
To indicate that an entity does not want to be contacted using text messages, simply select the new **Does Not Accept Texts** check box in the Contact Restrictions section.

Additional information

- The **When To Purchase** field has been relocated from the Contact Restrictions section to the Pricing Indicators section.
- The **Cell Provider** field has been removed from the Contact Restrictions section.

Access entity and unit information in a new tab

Updated buttons are available on the Task window for you to access an entity record or a unit record in a separate Internet browser tab with a single click. With this enhancement, you can easily switch between reviewing entity or unit details and task information with minimal navigation.



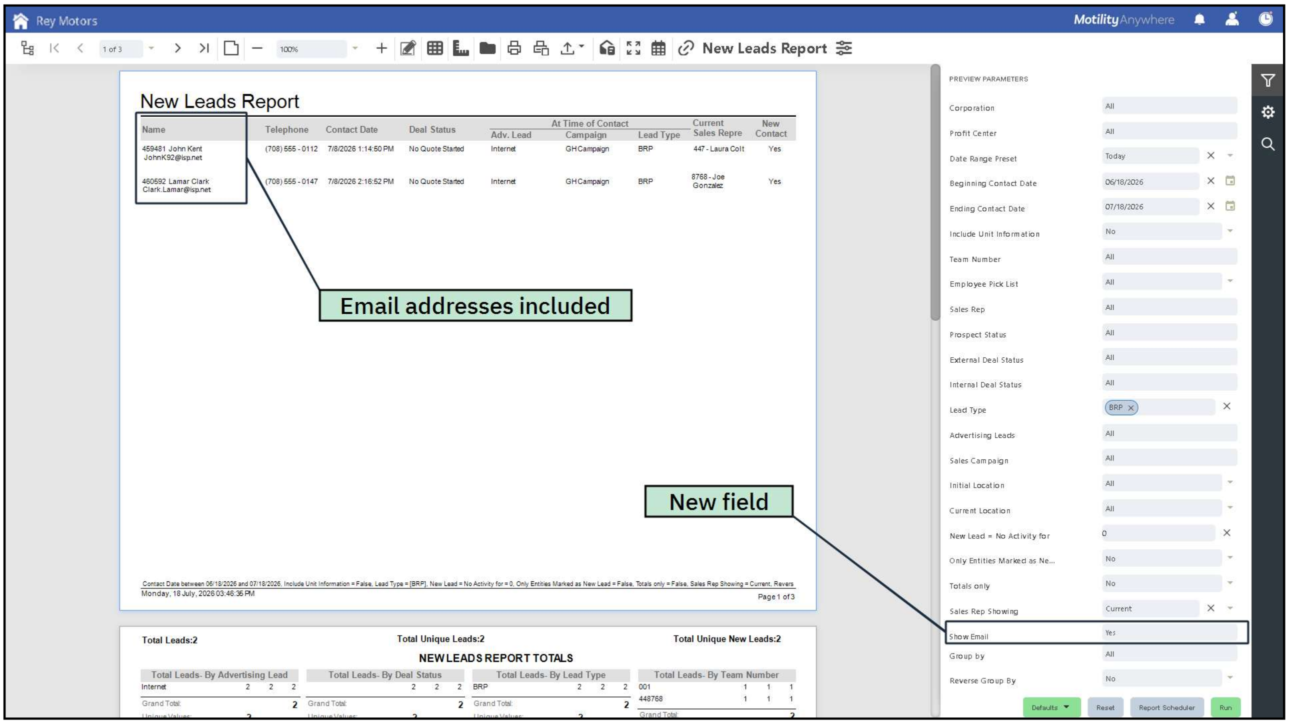
Simply click the **View Entity** button on the Task window to display the Entity window in the CRM module for the entity in a separate Internet browser tab. Similarly, click the **View Stock #** button to display the Unit Inventory window in the Unit Inventory module for the unit in a separate Internet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

When requesting the New Leads report, you can now display 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.

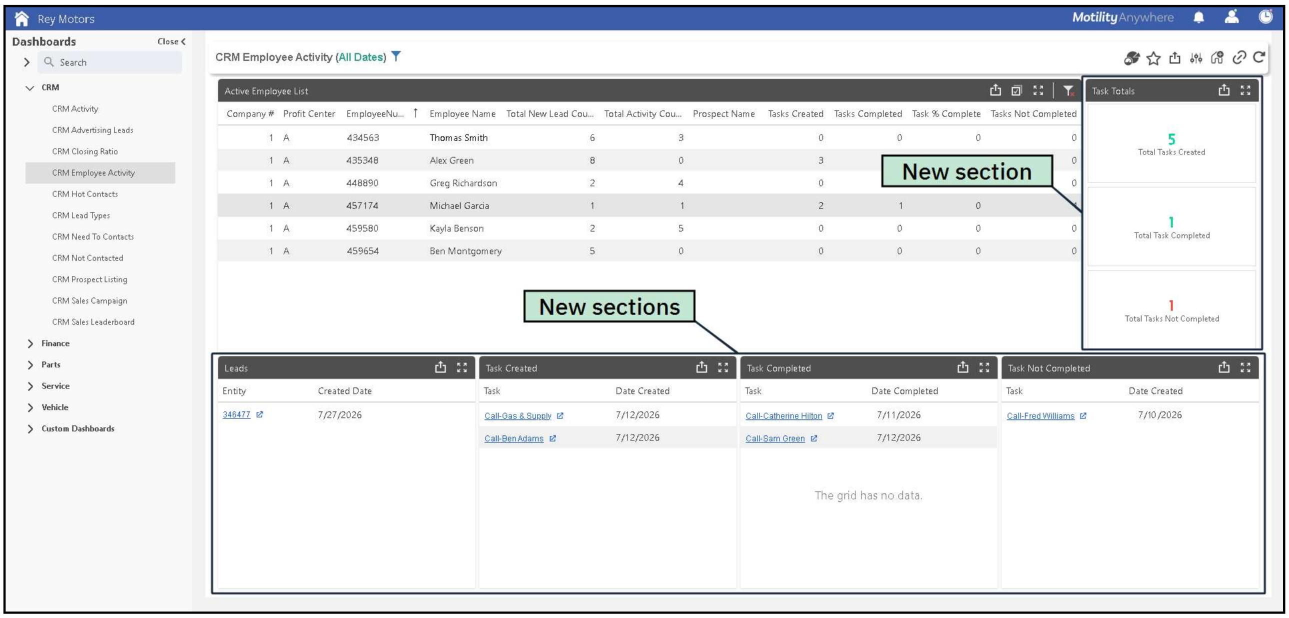


To include the Email addresses on the report, simply select **Yes** in the new **Show Email** field in the Preview Parameters section. Once all criteria is defined, click the **Run** button to request the report, as normal.

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.

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.



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.

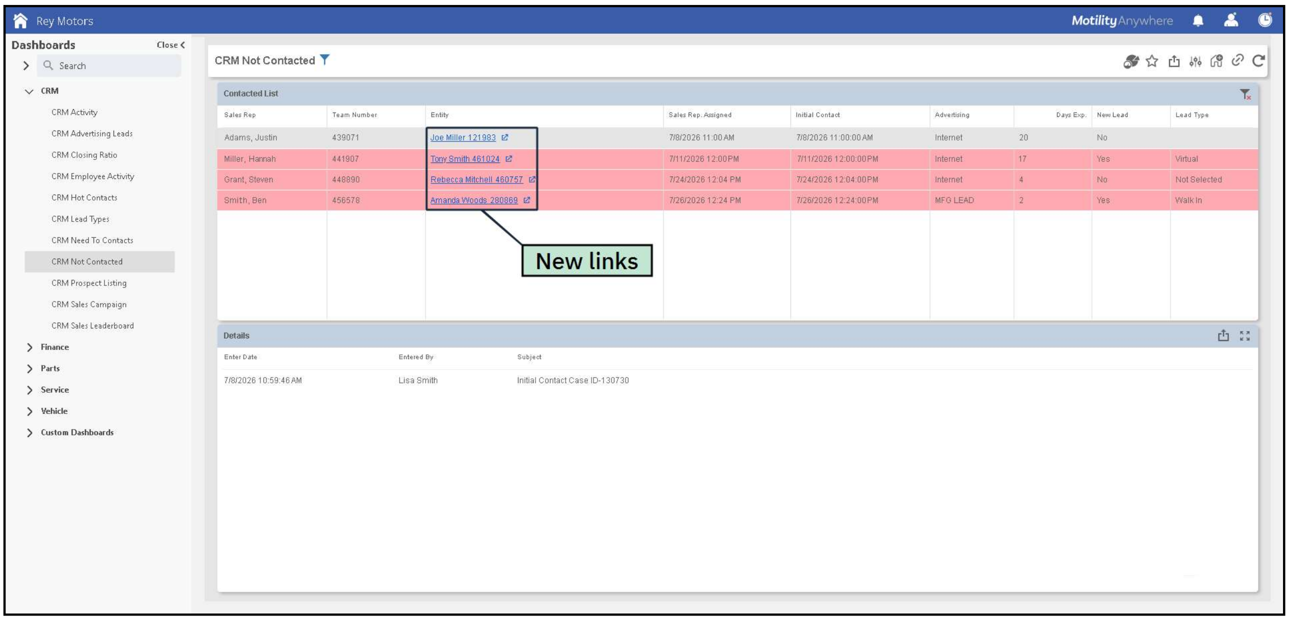
Click a link in the **Task** column in the new tables to access the Task window, where you can review details about the corresponding task, make changes to the task, and complete the task.

Additional information

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

Updated Dashboard view for reviewing customers to contact

Using new links on the CRM Not Contacted Dashboard view, previously the KPI CRM Not Contacted Dashboard view, you can quickly access the entity records for the customers included in the view. These new links can be especially useful if you need to quickly review details for customers prior to contacting them. In addition, the view has been reorganized to display in a more visually appealing layout.



The following enhancements are available for the CRM Not Contacted Dashboard view.

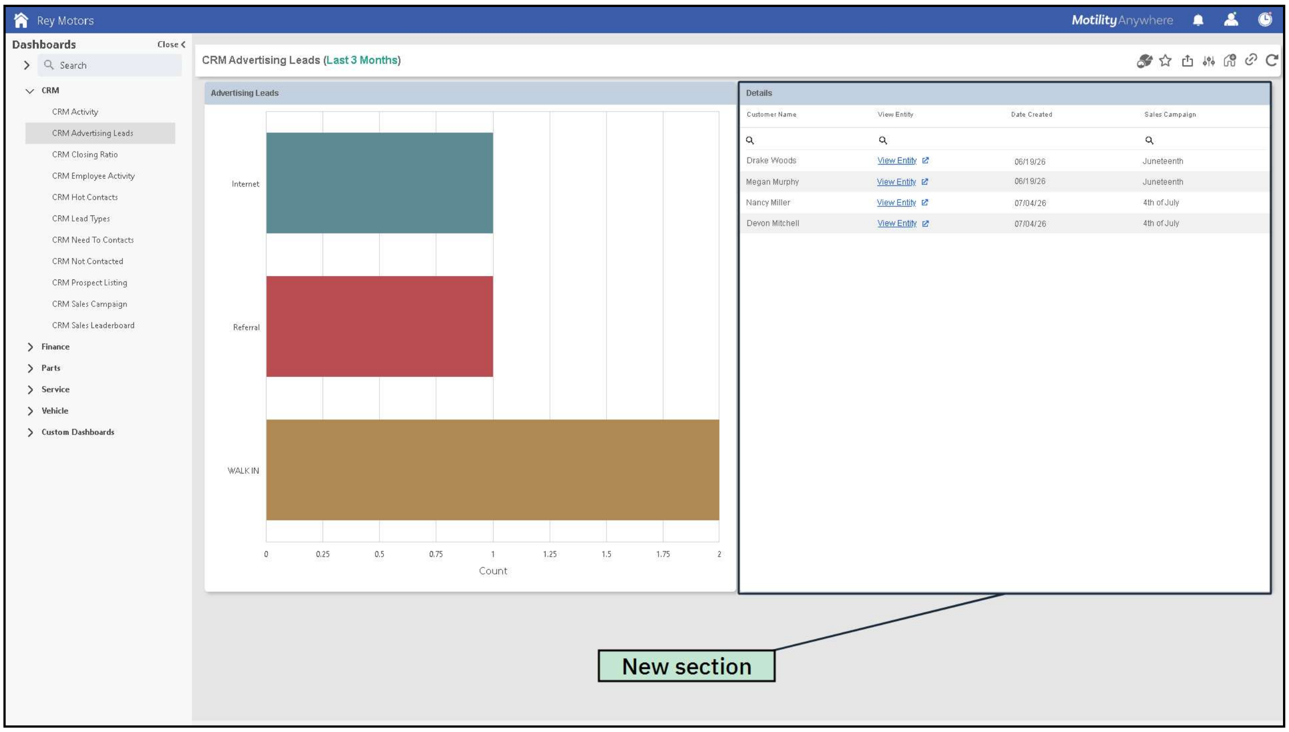
- The name and number for an entity now displays as a link in the **Entity** column. To view the customer's entity record, simply click the corresponding link in the **Entity** column. The entity record displays on the Entity Profile window in the CRM module in a new tab of the Internet browser.
- The Contacted List section is now labeled to help you more clearly identify customers to be contacted.
- The **Min Exp** column has been renamed the **Days Exp** column.
- The **Days Exp** column now displays the number of days since the customer was contacted.
- The **Subject** column in the Details section has been resized so that information can be reviewed more easily.

Additional information

- Since the name and number of the entity now display in the **Entity** column, the **Entity Name** column and the **Entity Number** column have been removed.

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 graph in the Advertising Leads section corresponding to a lead type 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.

Miscellaneous CRM enhancement

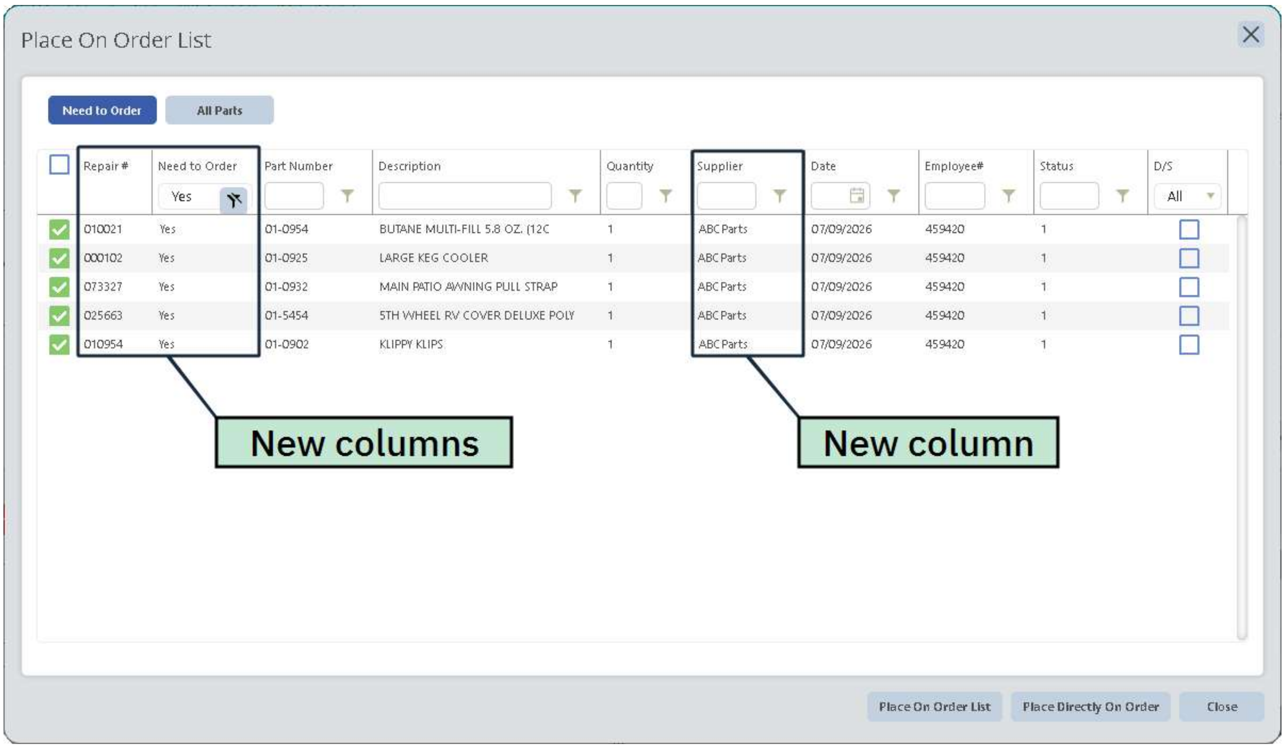
- When a deal is completed using the Deal Desking module, the entry in the **Temp Tag #1** field on the Units tab on the Deal window is now automatically entered in the **License Plate** field on the Vehicles tab on the Entity window.

Fixed Operations Enhancements

Parts & Service

Easily identify parts to order for a repair

New columns are available on the Place On Order List window to help you more easily determine which parts to order for a repair. The repair order line number for each part on the window now 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 are available 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.

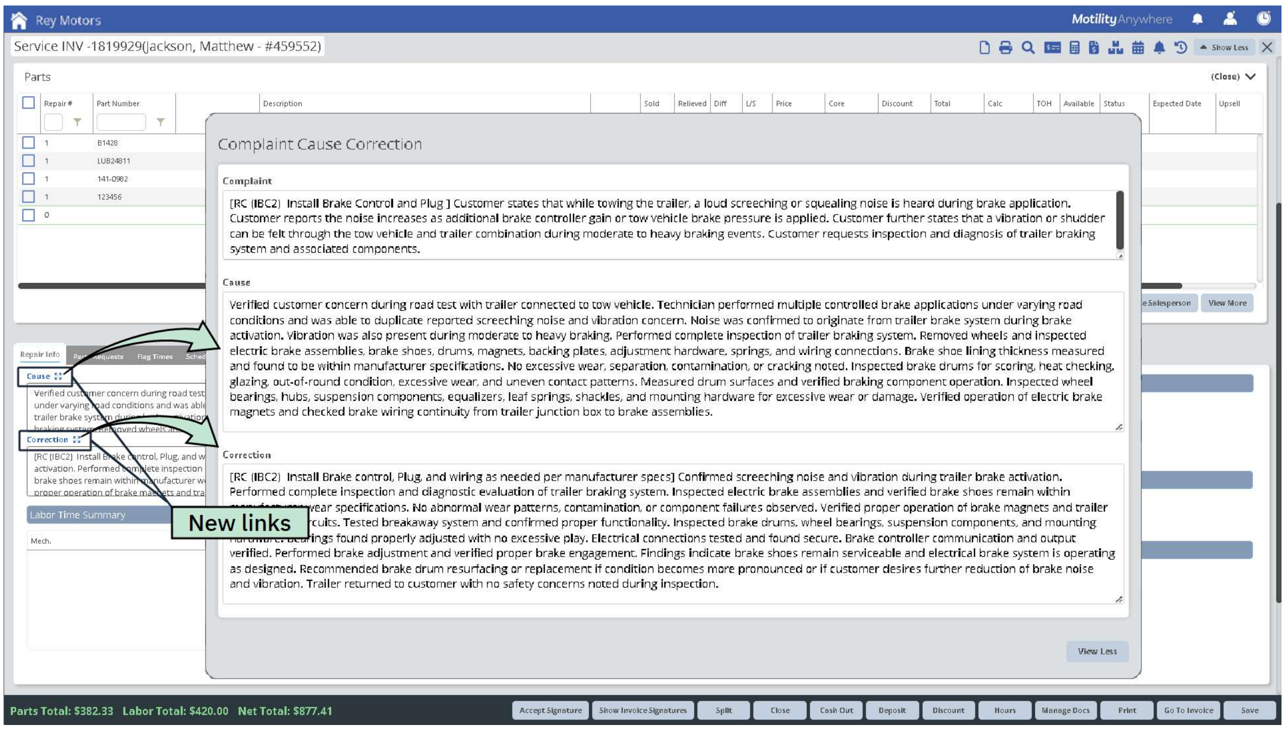
To order parts, simply select the check boxes for the parts and click the **Place On Order List** button or the **Place Directly On Order List** button, as normal.

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 with a blue background.

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.

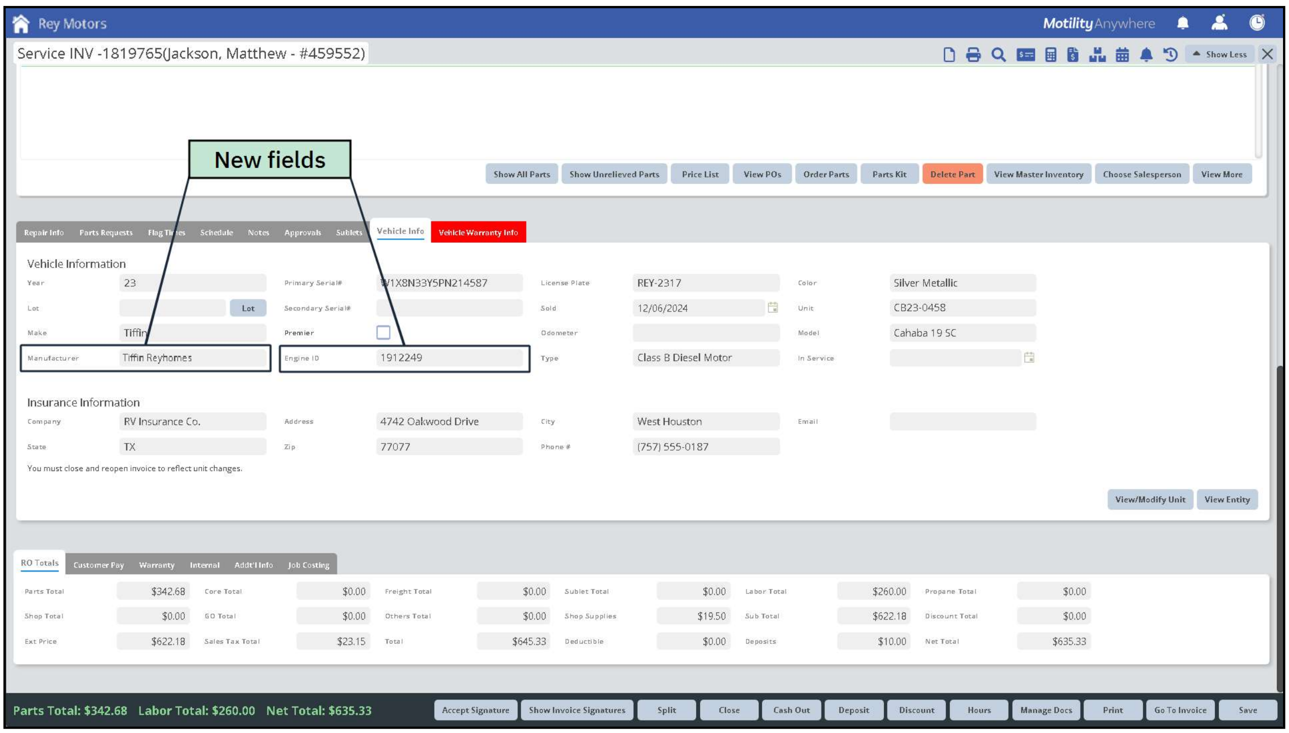


To display the Complaint Cause Correction window, simply click the new *Cause* link or the new *Correction* link on the Repair Info tab on the Service Invoice window. Using this window, you can review the complete complaint, cause, and correction information in an easy-to-read format. If needed, you 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 on 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. Now, you can reference the manufacturer and the engine ID without navigating away from the repair order, which can help save you time 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.

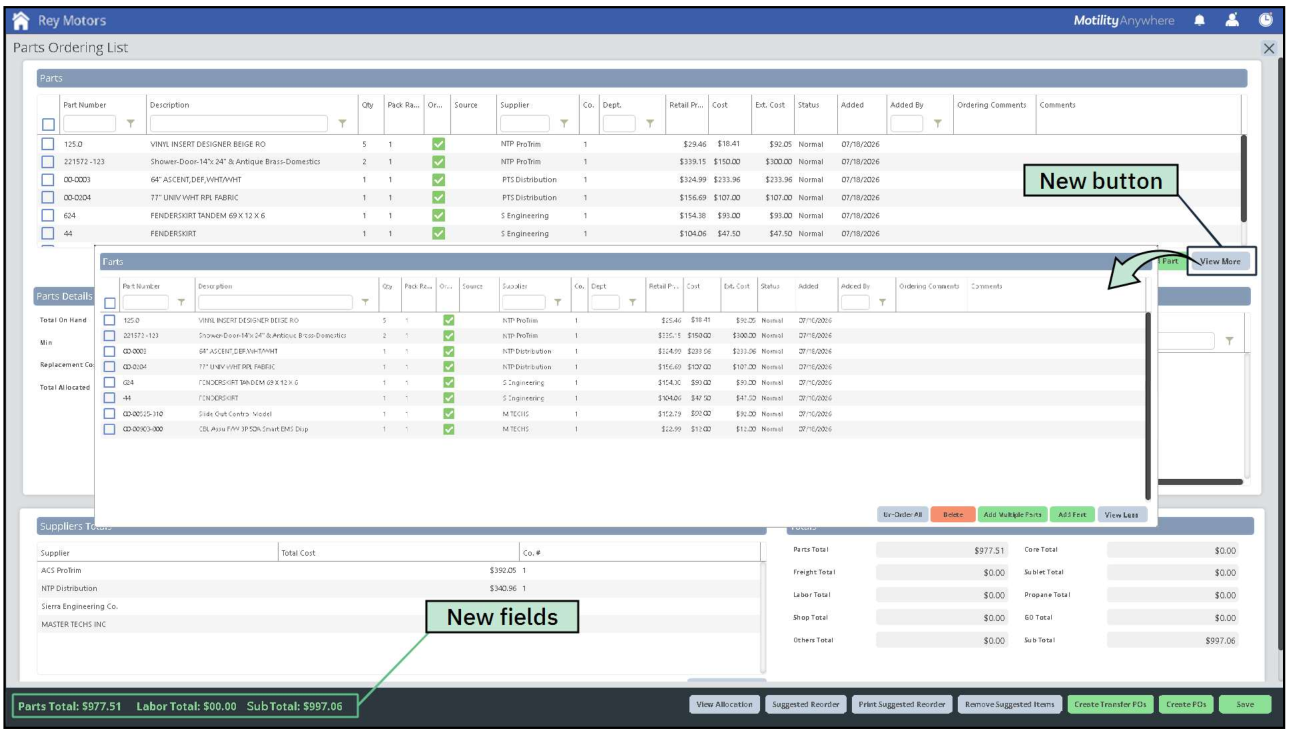
Note - The manufacturer and engine ID for a unit are defined using new fields on the Entity window in the CRM module. For more information about defining the manufacturer and the engine ID for a unit, refer to page 24.

Additional information

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

Easily review the full parts list on parts orders

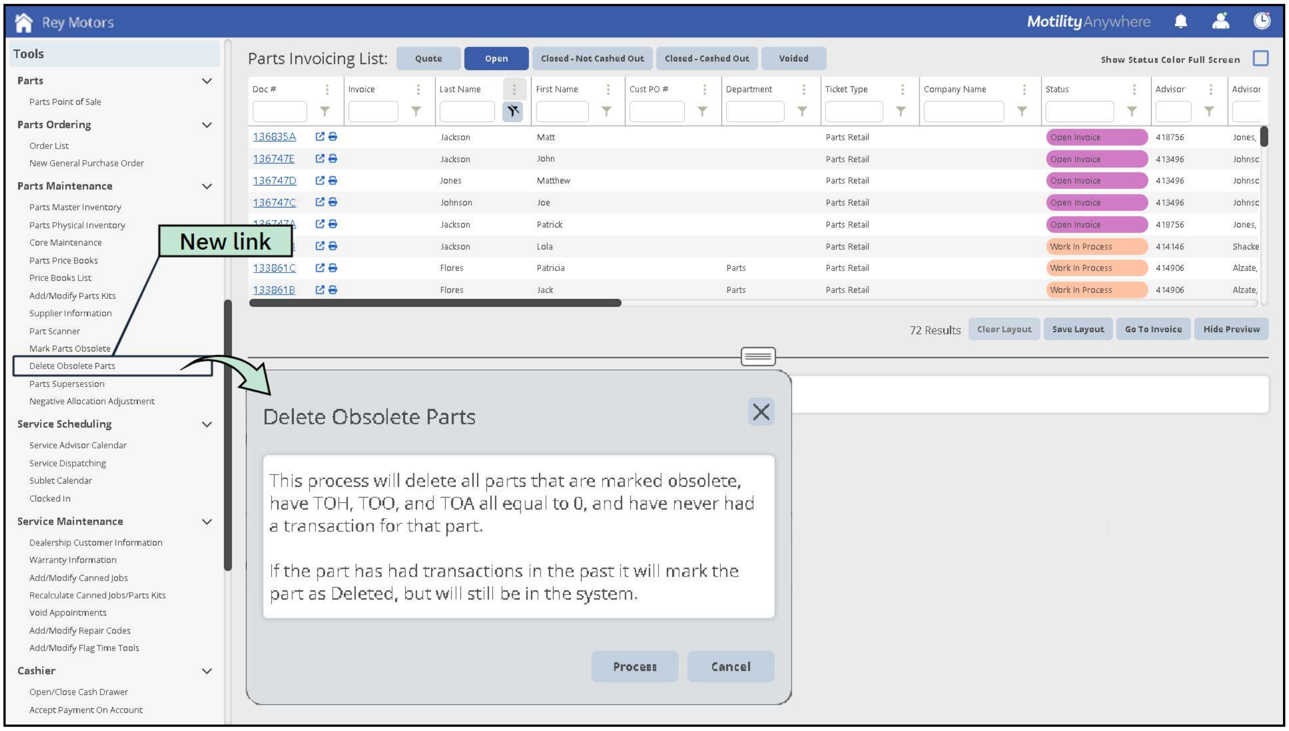
Using the new Parts window, you can more easily review and update the full list of parts on an order with a large number of parts. Previously, you were required to scroll through a parts list on the Parts Ordering List window to review and update parts on a large order. With this enhancement, the parts 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.

Delete obsolete parts more easily

Using a new link, you can now delete obsolete parts directly from 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.



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.

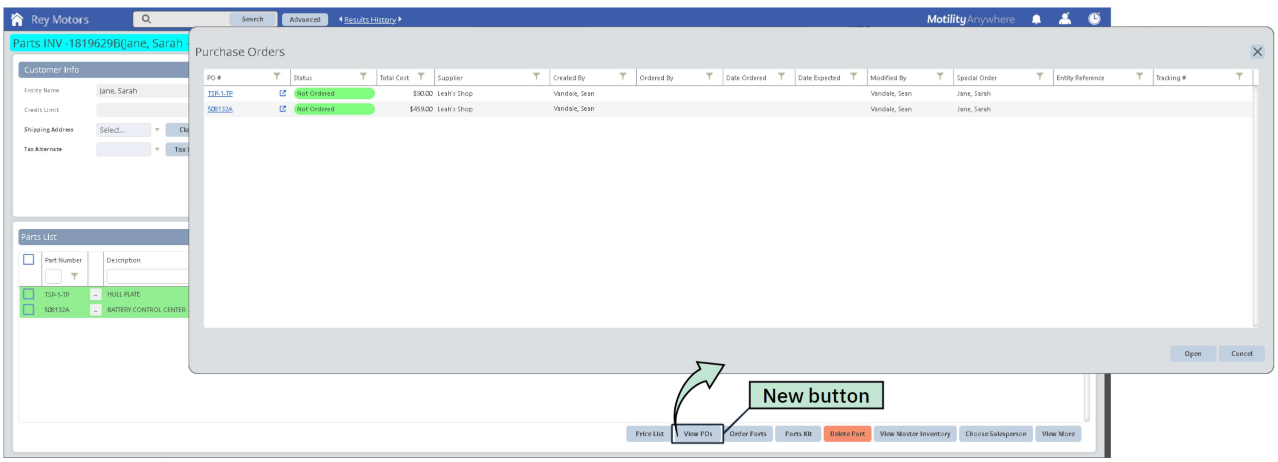
New security permission

- 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.

Quickly access purchase orders from an invoice

You can now access purchase orders related to an invoice directly from an invoice record. Previously, you were required to access the Purchase Order List screen and search for each purchase order individually to review and order parts. Now, you can access purchase orders directly from the Parts Invoice window or the Service Invoice window, helping you review purchase order details and order parts more quickly.

To review purchase orders for an invoice, simply click the new **View POs** button on the Parts Invoice window or the Service Invoice window. The new Purchase Orders window displays, where information for each purchase order for the invoice can be reviewed.

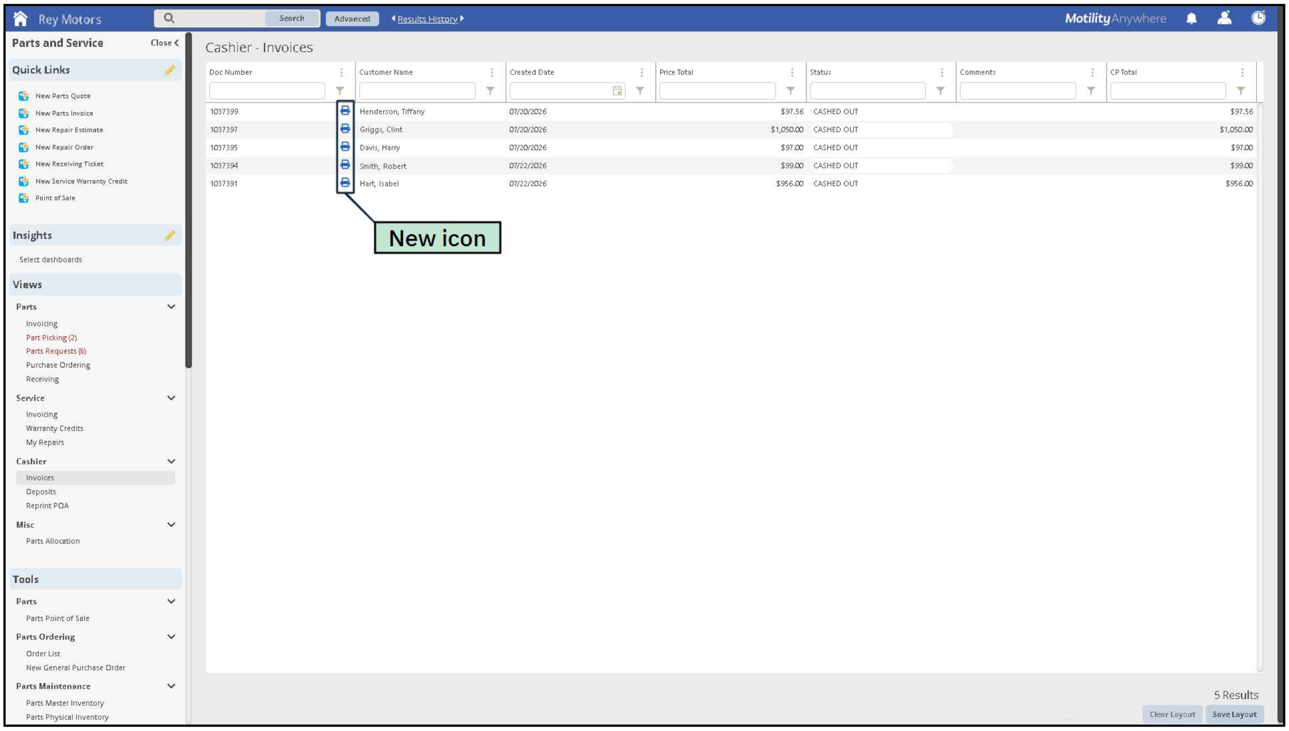


On the Purchase Orders window, you can review details for purchase orders for the invoice, such as the order status, the total cost, and the supplier for each purchase order.

To order parts for a purchase order, simply click the link for the purchase order in the **PO #** column or highlight the row for the purchase order and click the **Open** button. The Purchase Order window displays, where you can order parts for the purchase order, as normal.

Print invoices more efficiently

The Cashier - Invoices screen has been enhanced to allow you to print invoices from the screen using fewer steps. Using a new icon on this screen, you can access an invoice in the Reports module with a single click, where the invoice can be printed, as normal.



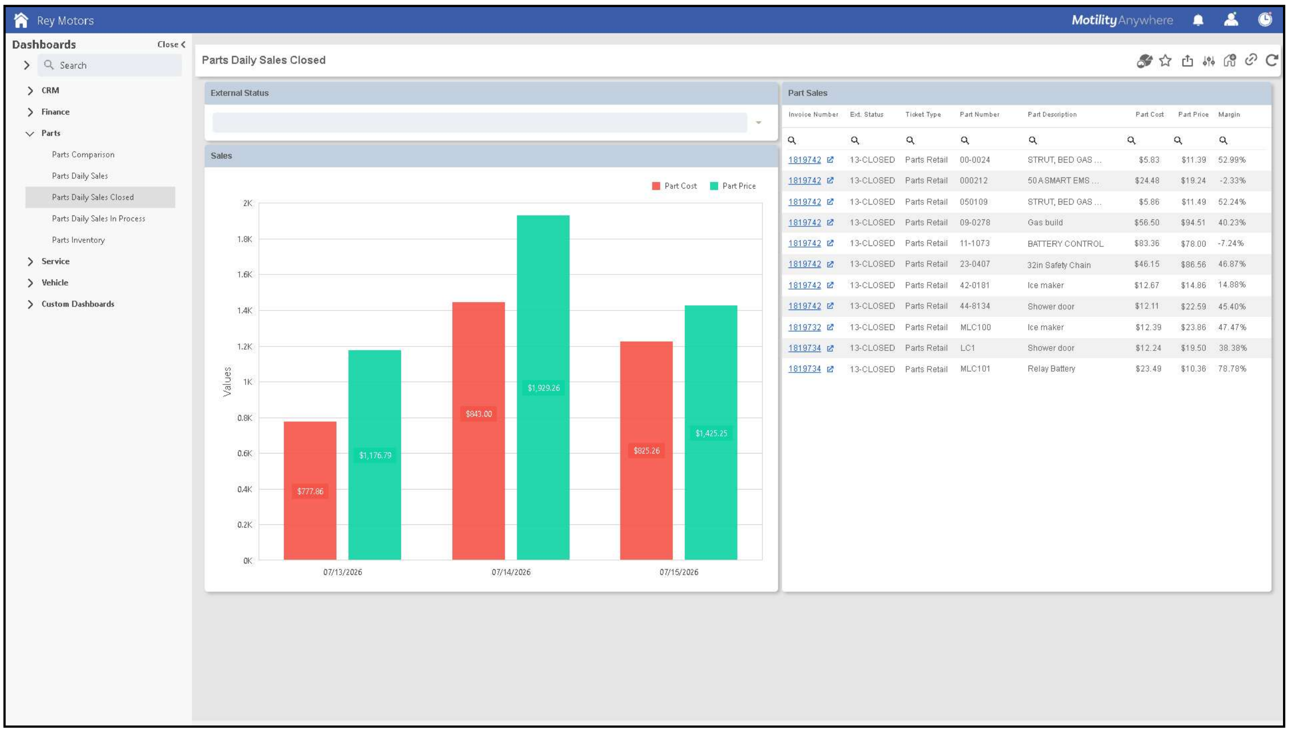
To display an invoice in the Reports module, simply click the new (Print) icon for the invoice in the **Doc Number** column on the Cashier - Invoices screen. The invoice displays in the Reports module on a new tab of the Internet browser, where it can be printed.

Additional information

- The unlabeled **Print** column on the Cashier - Invoices screen has been removed.

Monitor closed parts sales by date using a new Dashboard view

Using the new Parts Daily Sales Closed view in the Dashboard module, you can easily review overall parts sales amounts and invoice information for closed parts sales by date. This view includes a graph you can use to determine at a glance the total cost and price for closed parts sales for multiple dates, and also includes a section used to review details for each invoice included in the view. If you need to review additional details for an invoice, you can drill down to the invoice record directly from the view with a single click.



To access this view, click the *Parts Daily Sales Closed* link in the Parts section of the Dashboard menu. The view automatically displays parts sales from the previous week, but can be changed. Click the (Dashboard Parameters) icon to display the Define Parameters window, where the date range and other criteria for the view can be updated, as normal. In addition, you can use the field in External Status section to filter the invoices included in the view by one or more external statuses.

In the Sales section, a bar graph displays daily sales and sales cost totals, as well as the margin percentage between the two values, for all invoices included in the view.

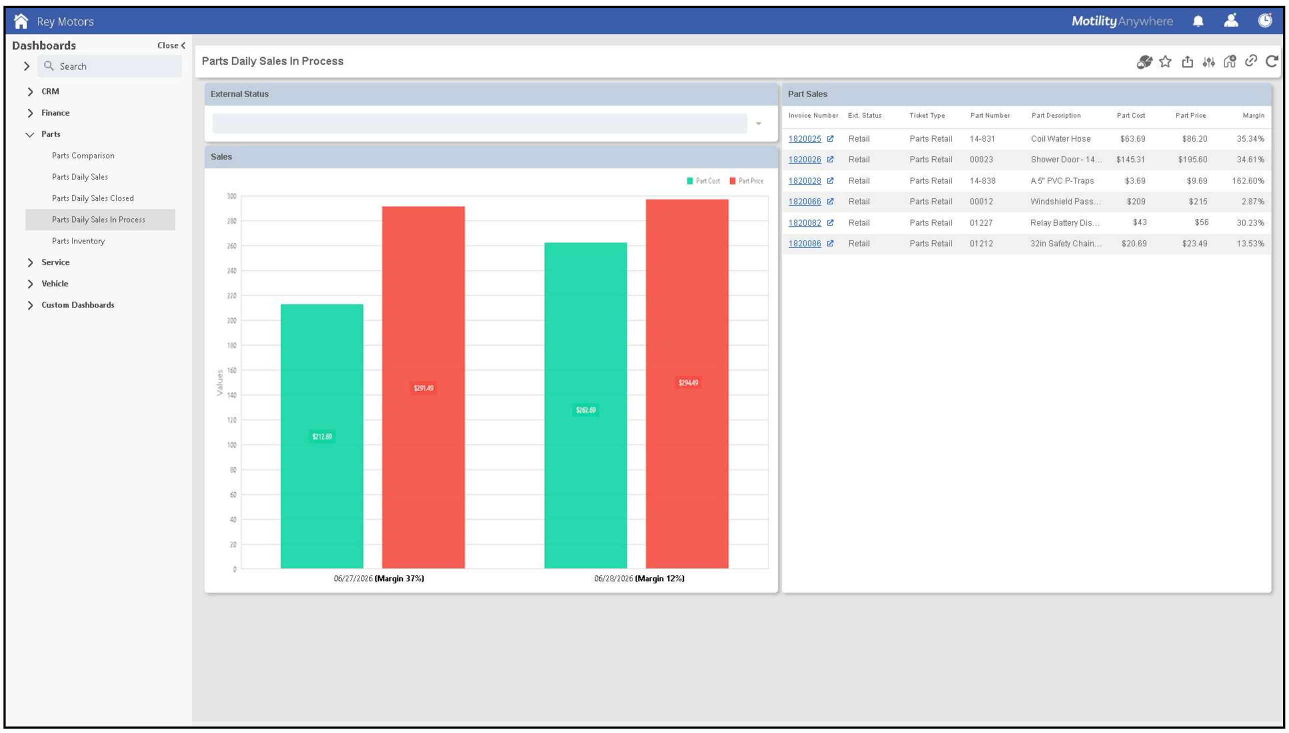
Additional information for each parts sale displays in the Parts Sales section. Click a bar in the graph in the Sales section for a date to only display data for parts sales for that date in the Parts Sales section.

The following columns display in the Parts Sales section.

- **Invoice Number.** This column displays the invoice number for the parts sale as a link. Click the link for an invoice to display the Service Invoice window in the Parts & Service module for the invoice, where detailed information for the parts sale can be reviewed.
- **Ext. Status.** This column displays the external status for the parts sale.
- **Ticket Type.** This column displays the ticket type for the parts sale.
- **Part Number.** This column displays the part number for the parts sale.
- **Part Description.** This column displays a description for the parts sale.
- **Part Cost.** This column displays the part cost for the parts sale.
- **Part Price.** This column displays the part sales price for the parts sale.
- **Margin.** This column displays the margin percentage between the sales amount and the sales cost amount for the parts sale.

Monitor daily parts sales currently in process using a new Dashboard view

The Parts Daily Sales In Process view is now available in the Dashboard module to help you more easily monitor parts sales that have not been closed. This view includes a graph used to illustrate the cost and price for open parts sales by date, and also includes a section used to review details for each invoice included in the view. In addition, you can drill down to the invoice for a parts sale directly from the view if additional details for a pending sale are required.



To access the Parts Daily Sales In Process view, click the *Parts Daily Sales In Process* link in the Parts section of the Dashboard menu. The view automatically displays data for the previous week, but can be changed. Click the (Dashboard Parameters) icon to display the Define Parameters window, where the date range and other criteria for the view can be updated, as normal. In addition, you can use the field in the External Status section to filter invoices included in the view by one or more external statuses.

In the Sales section, the graph displays sales and sales cost totals, as well as the margin percentage between the two values, for each date included in the view. The External Status section can be used to filter results on the view by external status. Multiple external statuses can be selected in this section.

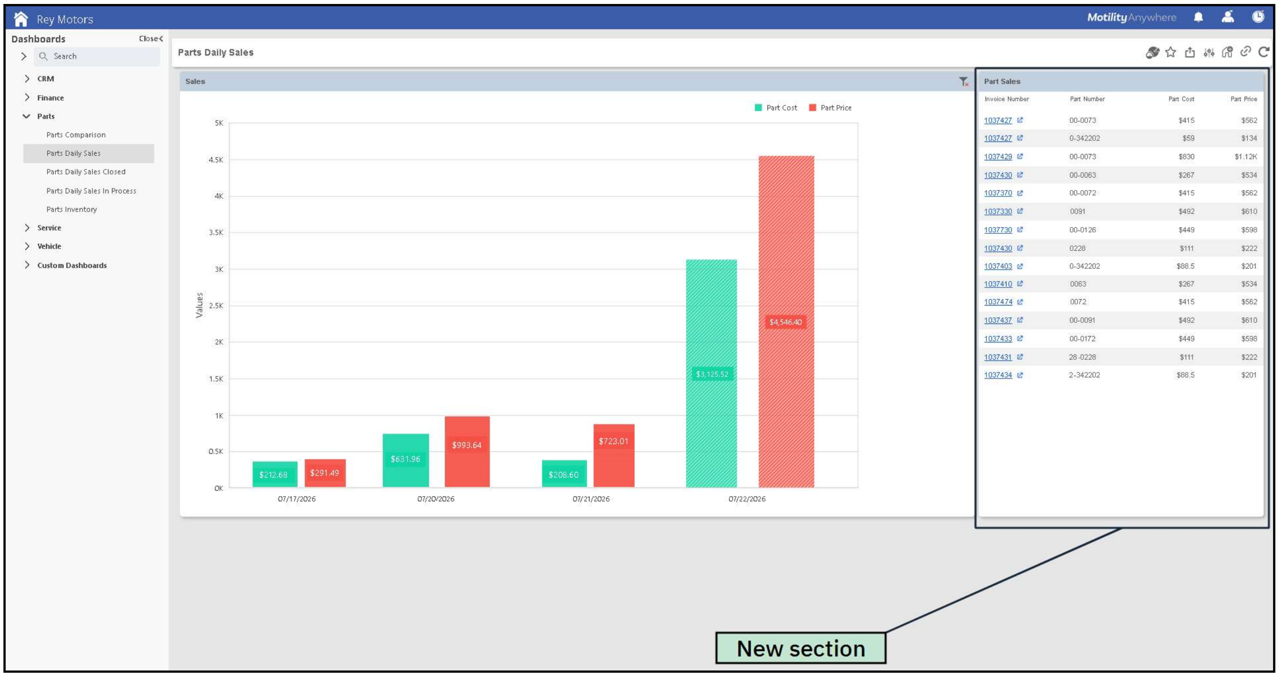
Additional information for each parts sale displays in the Parts Sales section. Click a bar in the graph in the Sales section for a date to only display data for parts sales for that date in Parts Sales section.

The following columns display in the Parts Sales section.

- **PO Number.** This column displays the invoice number for the parts sale as a link. Click the link for an invoice to display the Purchase Order window in the Parts & Service module for the parts sale.
- **Ext. Status.** This column displays the external status for the parts sale.
- **Ticket Type.** This column displays the ticket type for the parts sale.
- **Part Number.** This column displays the part number for the parts sale.
- **Description.** This column displays a description for the parts sale.
- **Part Cost.** This column displays the part cost for the parts sale.
- **Part Price.** This column displays the part sales price for the parts sale.
- **Margin.** This column displays the margin percentage between sales amount and sales cost amount for the parts sale.

Updated view for reviewing daily parts sales

The Parts Daily Sales Dashboard view, previously the KPI Parts Daily Sales view, has been updated to allow you to review more detailed information for specific invoices included in the view. With this enhancement, a new section is available for you to review individual parts sales information for each invoice. In addition, you can now drill down to a parts invoice if you need to review complete information for a parts sale.



When the Parts Daily Sales view is accessed, data for all invoices included in the view displays in the new Part Sales section. Click a bar in the graph corresponding to a date in the Sales section to only display sales data for the selected date in the Part Sales section.

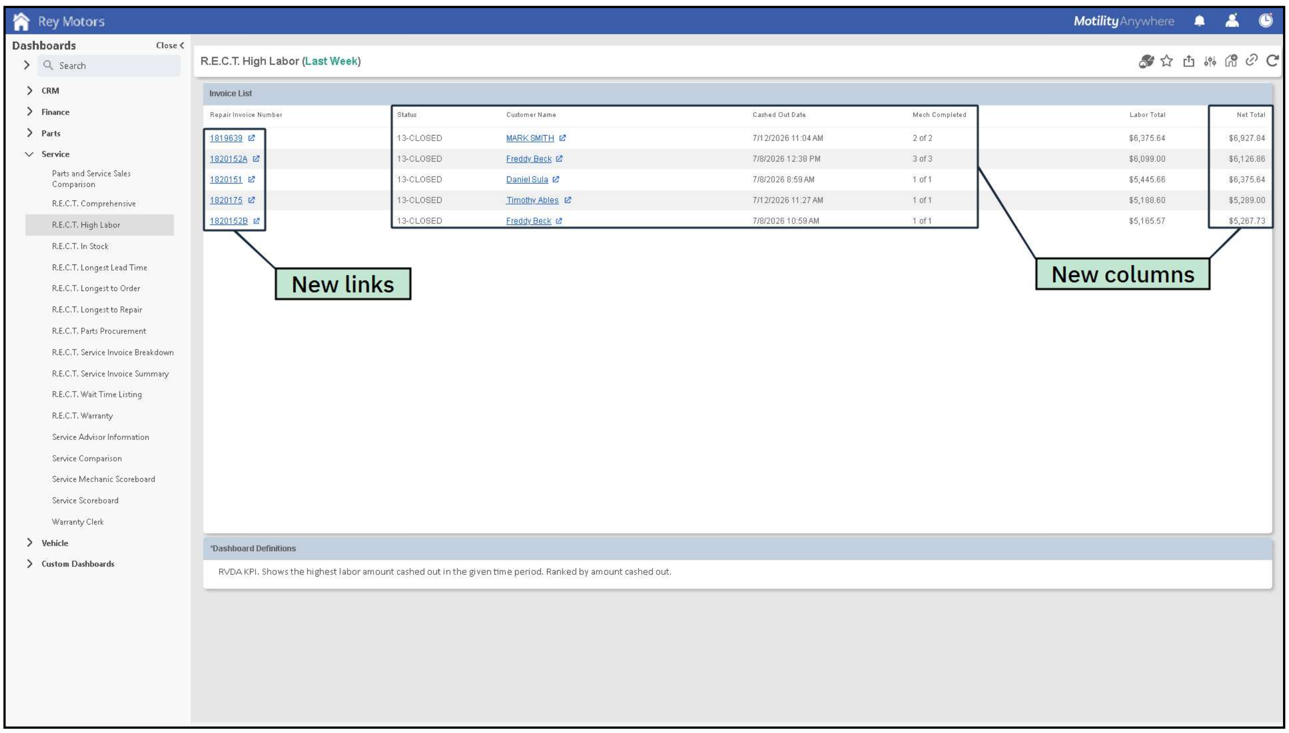
The following columns display in the Part Sales section.

- **Invoice Number.** This column displays the invoice number for the sale as a link. Click this link to access the Service Invoice window in the Parts & Service module in a new tab of the Internet browser, where you can review detailed information for the parts sale.
- **Part Number.** This column displays the part number for the sale.
- **Part Cost.** This column displays the cost for the parts sale.
- **Part Price.** This column displays the sales price for the parts sale.

Note - The Dashboard view automatically displays parts sales for the past five days, but can be changed.

Review high labor invoice data using updated Dashboard view

Various enhancements are available for the R.E.C.T. High Labor Dashboard view to allow you to monitor more detailed information for service invoices with the highest labor sales. Using new columns, you can review additional data, such as the invoice status and the customer name, for the invoices in the view. If you need to review additional details for an invoice or the corresponding entity, you can now drill down to the invoice record or entity record with a single click using new links.



The **Repair Invoice Number** column, previously the **Repair Order Number** column, now displays the service invoice number as a link. Click the link for an invoice to display the invoice record on the Service Invoice window in a new tab of the Internet browser.

The following new columns display on the R.E.C.T. High Labor view.

- **Status.** This column displays the current status of the invoice.
- **Customer Name.** This column displays the name of the customer as a link. Click the link for a customer to display the customer's entity record on the Entity Profile window in the CRM module in a new tab of the Internet browser.
- **Cashed Out Date.** This column displays the cashed out date and time for the invoice.

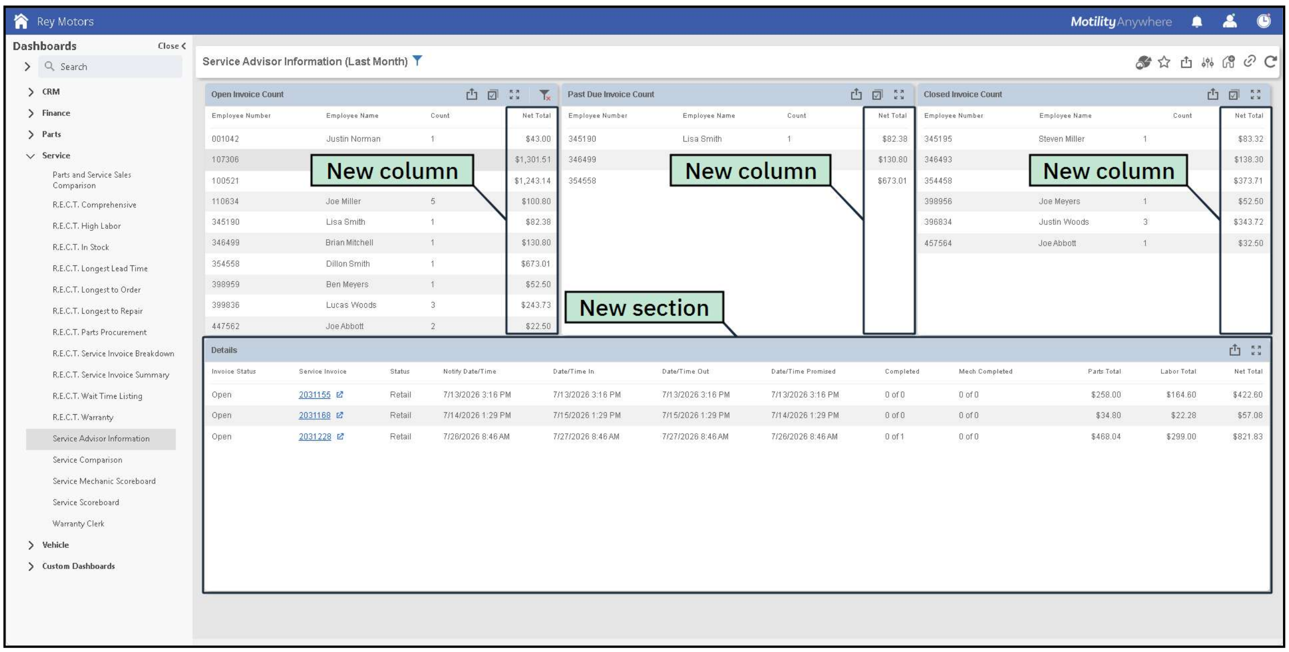
- **Mech Completed.** This column displays the number of repairs completed for the invoice.
- **Net Total.** This column displays the total sales amount for the invoice.

Additional information

- The **Total Labor** field has been renamed the **Labor Total** field.

Monitor invoice management for advisors using enhanced Dashboard view

Service managers can now monitor open, past due, and closed invoices for advisors more easily using various enhancements for the Service Advisor Information Dashboard view, previously the KPI Service Advisor Information Dashboard view. Using new columns, you can review the total dollar amount of invoices in the various statuses for each advisor. A new section is also available for you to review additional invoice details for multiple advisors or for an individual advisor, and you can use new links to drill down to individual service invoices to review complete invoice details.



On this view, you can now review the total dollar amount of the invoices that are open, past due, or closed for each advisor using the new **Net Total** column. This column displays in the Open Invoice Count section, the Past Due Invoice Count section, and the Closed Invoice Count section.

In addition, the new Details section is available for you to review additional details for invoices included in the module, such as the invoice status, the date and time that the invoice was completed, and the invoice number. If you need to review more detailed information for an invoice, you can drill down to the invoice record in the Parts & Service module by clicking the link for the invoice in the **Service Invoice** column.

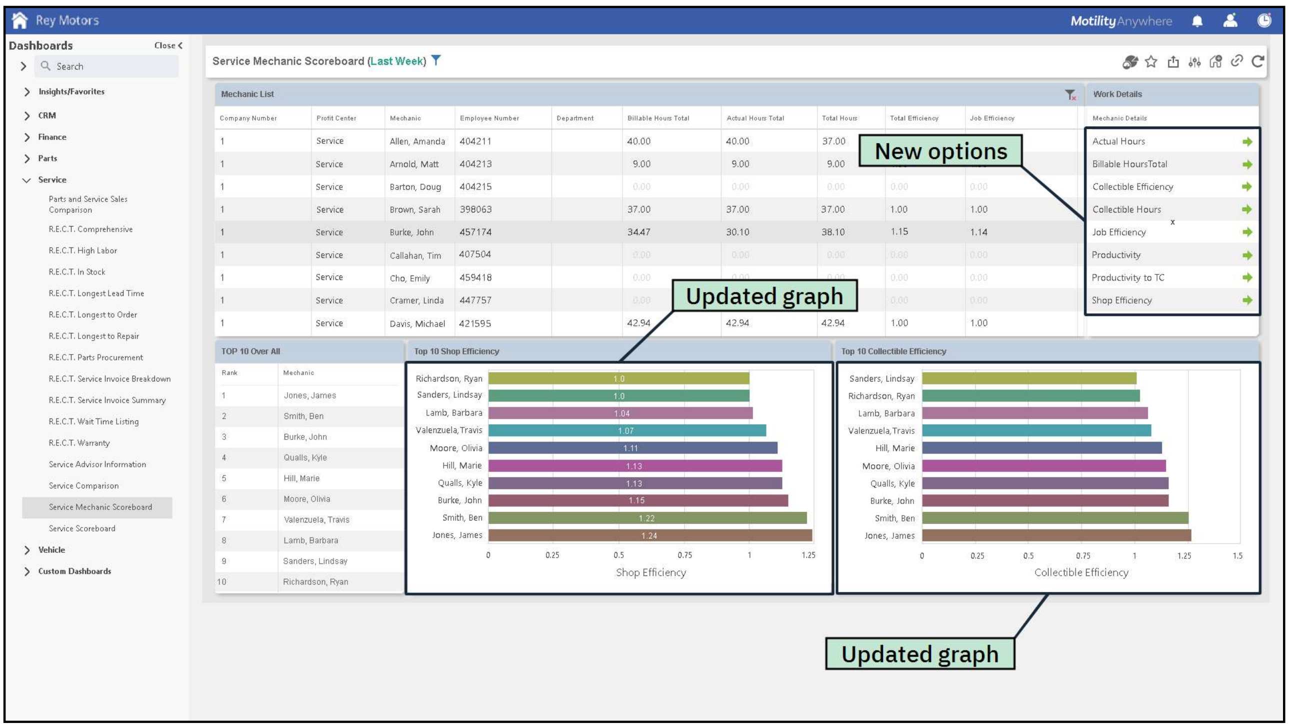
The Details section can be filtered to display data for a specific advisor or for multiple advisors. To display data for a single advisor, simply click a row for an advisor in the Open Invoice Count section, the Past Due Invoice Count section, or the Closed Invoice Count section. To display data for multiple advisors, click the (Multi-Select) icon and select multiple advisors in the Open Invoice Count section, the Past Due Invoice Count section, or the Closed Invoice Count section.

Additional information

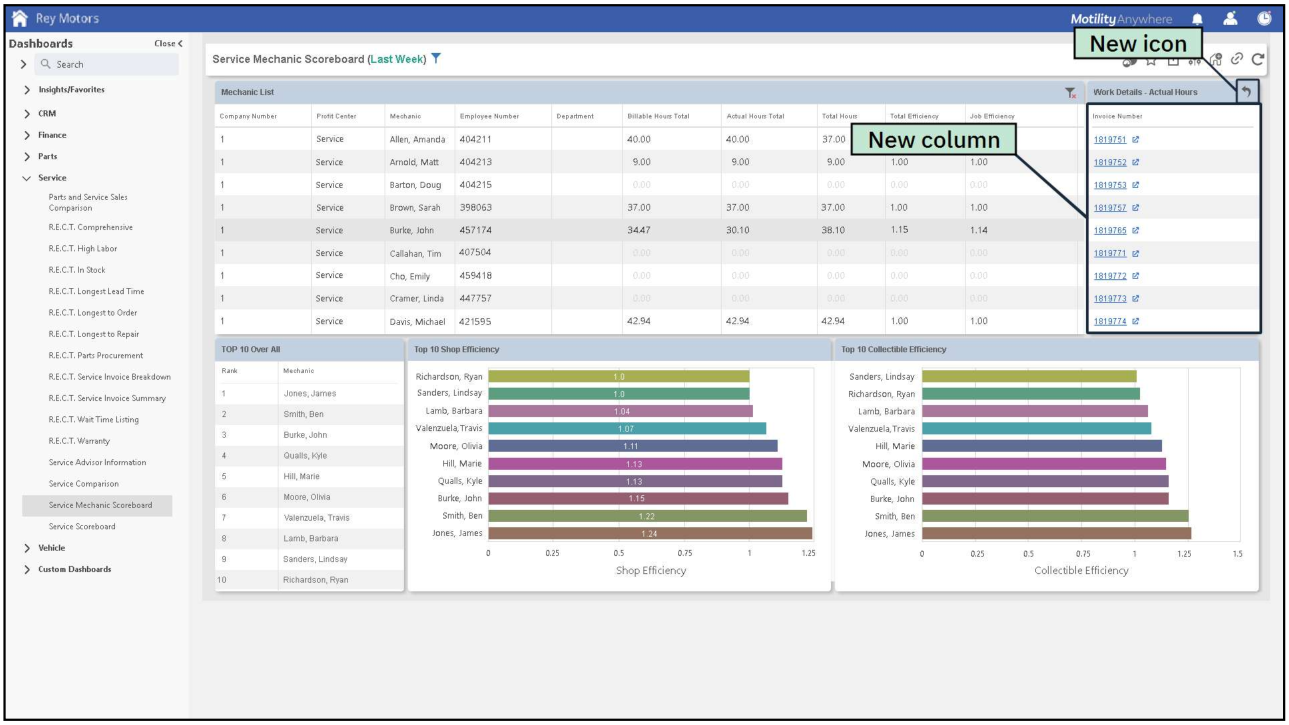
- The Service Advisor Information Dashboard view now displays data for the previous month by default, but can be changed.

Updated Dashboard view for reviewing technician performance

Multiple enhancements are available for the Service Mechanic Scoreboard Dashboard view, previously the KPI Service Mechanic Scoreboard Dashboard view, to help you more effectively monitor whether technicians are completing service work efficiently. The Work Details section on the view has been enhanced to allow you to identify and access invoices corresponding to various metrics for specific technicians. In addition, new graphs have been added to the view to help you identify and compare the top ten technician performers at a glance.



The updated Work Details section can now be used to identify the specific invoices for a technician that are included in the various metrics in the view. For example, when you select a technician in the Mechanic List section, the Work Details section displays a list of the performance metrics in the view that include values for the technician. Simply click a metric, such as job efficiency, to display the list of invoices used to calculate job efficiency for the technician as links.



If you need to review additional information for an invoice, simply click the link for the invoice in the **Invoice Number** column. The Service Invoice window in the Parts & Service module for the invoice displays in a new tab of the Internet browser, where you can review the invoice information. To return to the previous display in the Work Details section, click the new ↰ (Drill Up) icon.

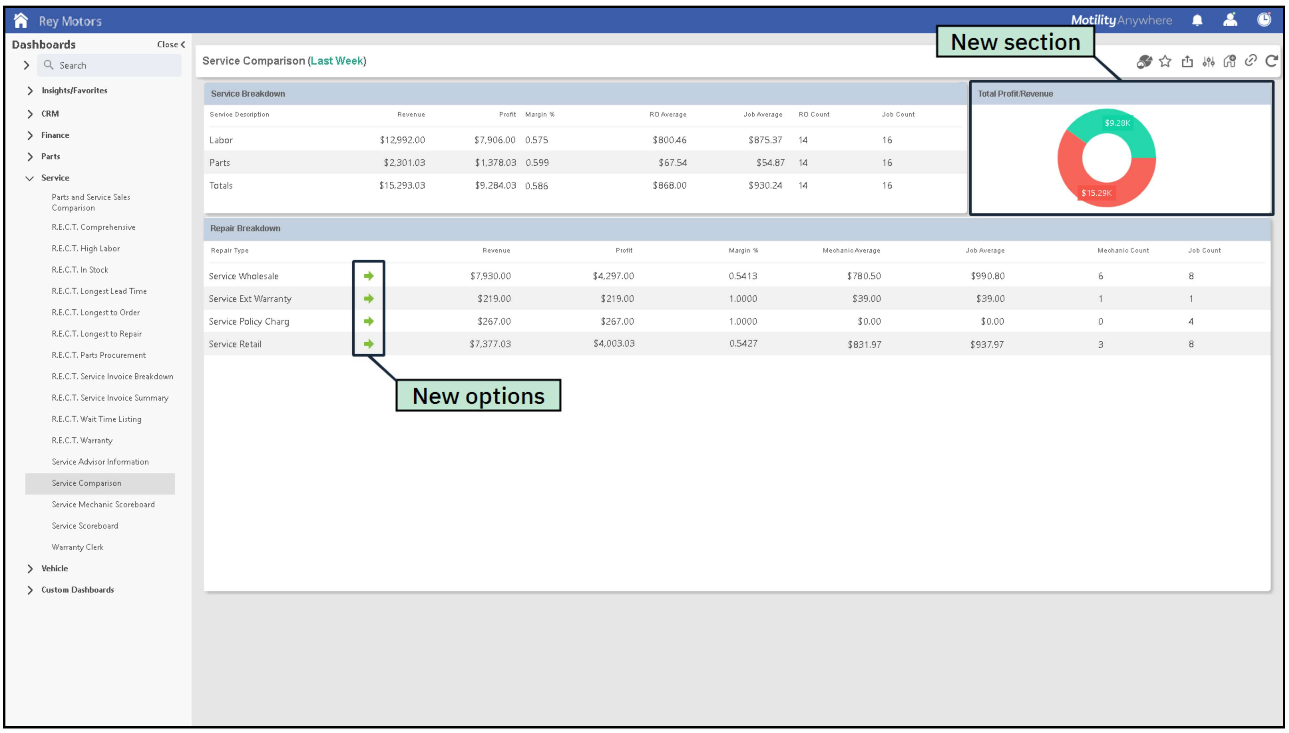
In addition, the graphs in the Top 10 Shop Efficiency section and the Top 10 Collectible Efficiency section now display the top 10 performing technicians for shop efficiency and collectible efficiency. In each graph, technicians display in descending order of rank on the y-axis, and each ranked technician's shop efficiency value or collectible efficiency value display on the x-axis for easy comparison.

Additional information

- The **Employee Number** field has been moved to the right of the **Mechanic** field.
- The **Collectible Hours** field has been renamed the **Total Hours** field, and the **Collectible Efficiency** field has been renamed the **Total Efficiency** field.

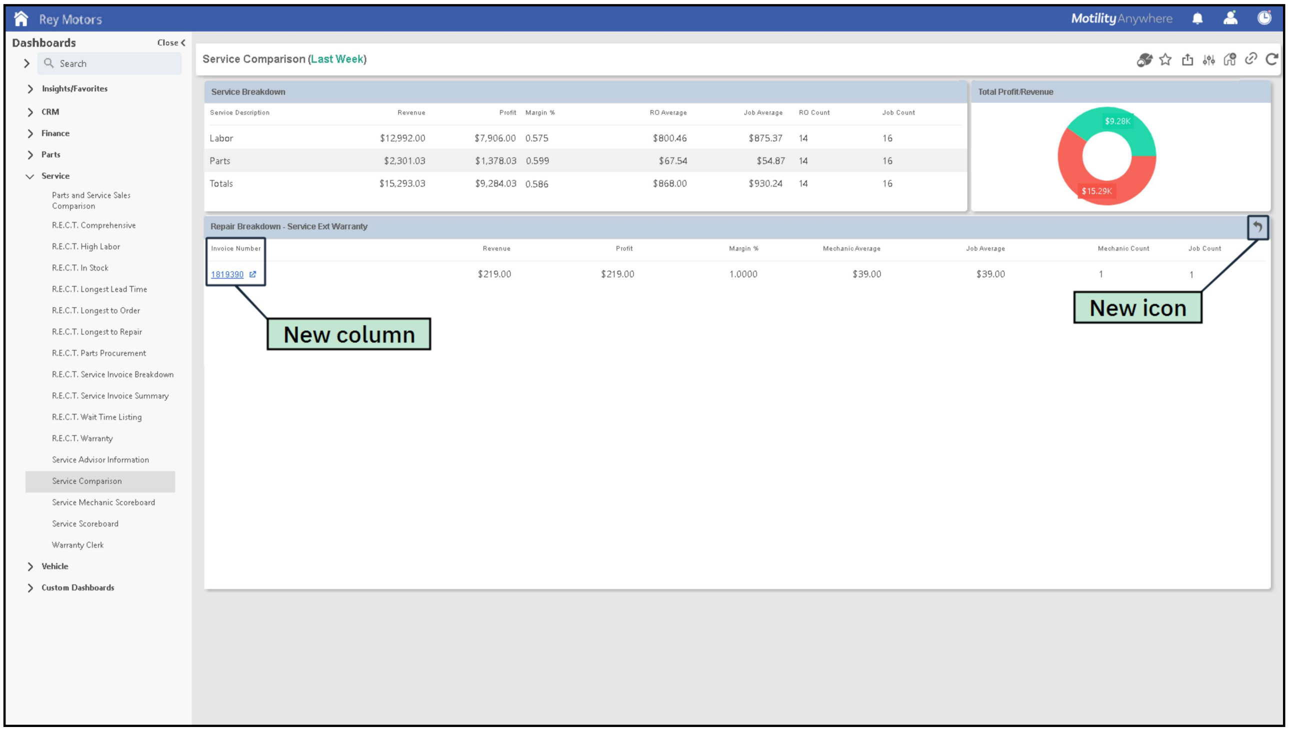
Review overall service performance using enhanced Dashboard view

The Service Comparison Dashboard view, previously the KPI Service Comparison Dashboard view, has been updated to help you review sales and profit performance for the service department more easily. A new chart is available on the view for you to review overall revenue and profit amounts at a glance. In addition, you can now drill down to display details for each invoice for a repair type in the view, and further drill down to a specific invoice in the Parts & Service module if more details are needed.



To allow you to quickly review a visual representation of the overall service revenue and profit, a chart has been added in the new Total Profit/Revenue section of the view. On this chart, the total revenue displays as a rounded value and is illustrated by the red portion of the chart, and total profit displays as a rounded value and is illustrated by the green portion of the chart. This chart can be useful for reviewing an overall snapshot of service performance for a time period when exact figures are not needed.

In the Repair Breakdown section, you can now display a list of invoices for a specific repair type. To display a list of invoices for a repair type, simply click the row for the repair type in the Repair Breakdown section. Details for each invoice, such as revenue and profit amounts, displays in this section for easy review. To return to the previous display, click the new (Drill Up) icon.



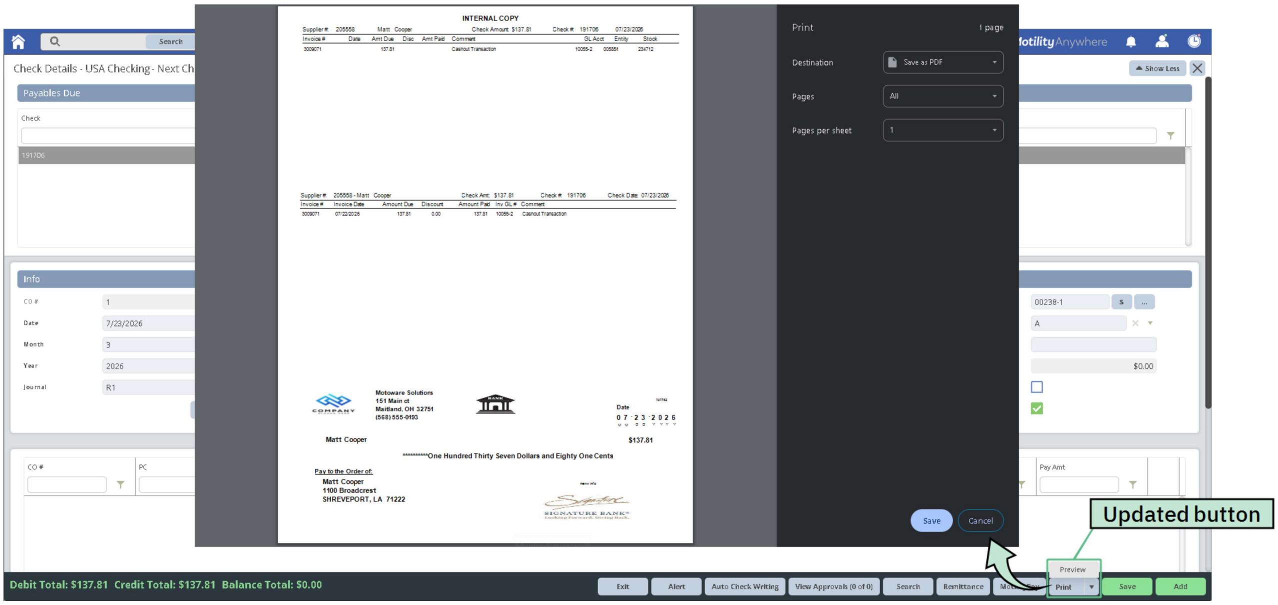
If additional details for a specific invoice are needed, simply click the link for the invoice in the **Invoice Number** column. The Service Invoice window in the Parts & Service module displays in a new tab of the Internet browser, where you can review complete details for the invoice.

Business Office Enhancements

Accounting

Print checks more efficiently

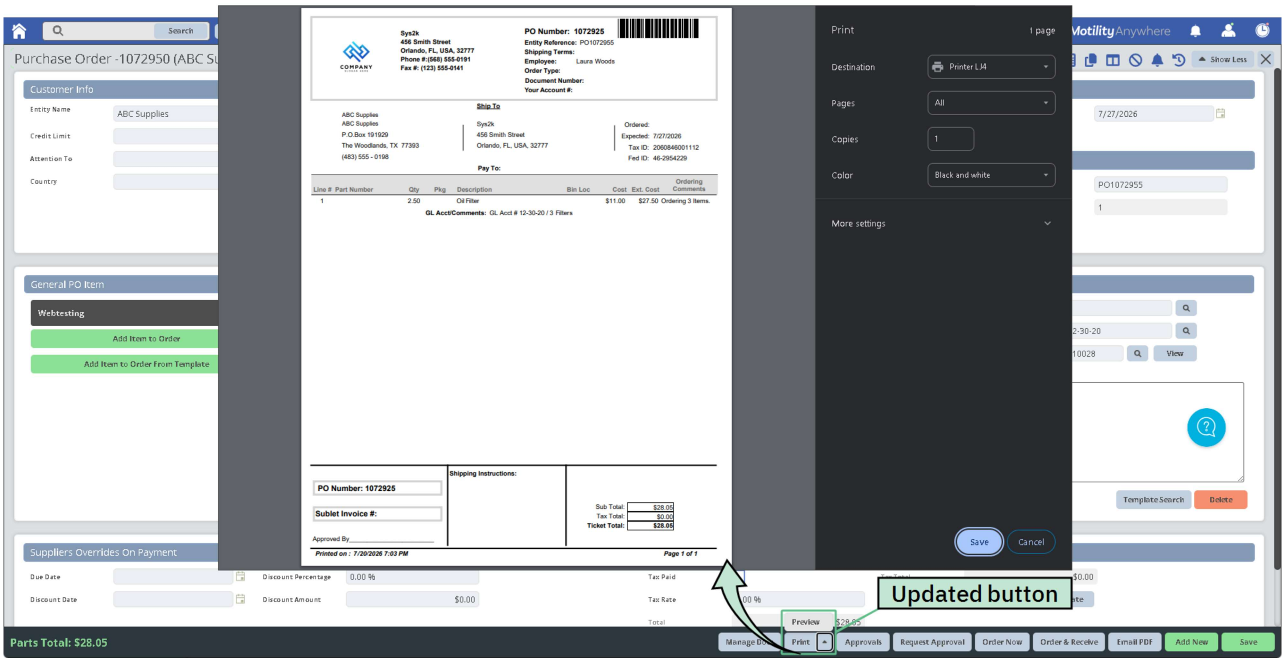
You can now print checks on the Check Details window using fewer steps. To print a check, simply click the updated **Print** button on the Check Details window to display the Print window, where printer options can be selected and the check can be printed, as normal.



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.

Print purchase orders more efficiently

On the Purchase Order window, you can now print purchase orders 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.



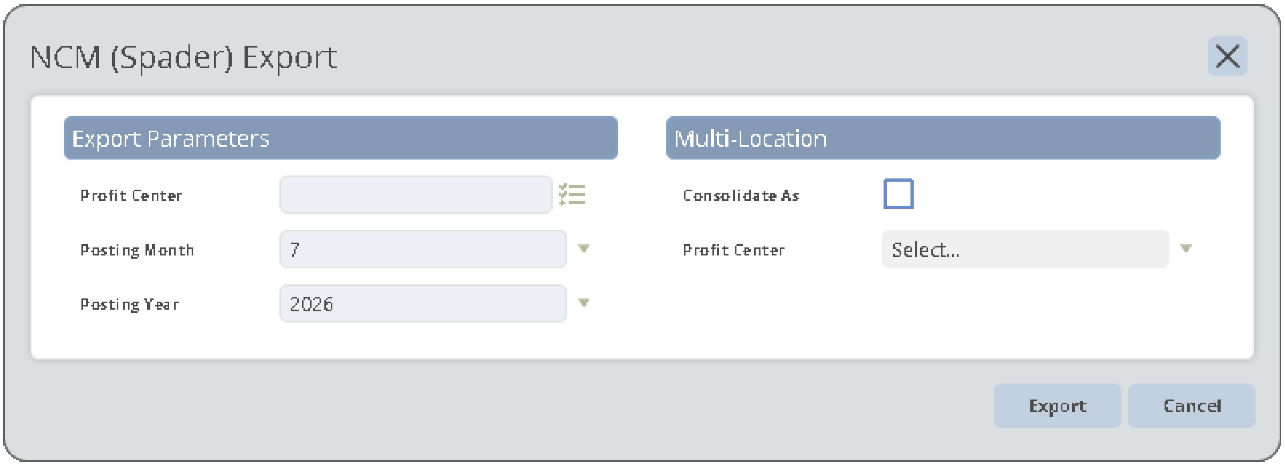
If needed, you can still preview the purchase order before printing. To preview the purchase order, simply click the (Up Arrow) icon for the **Print** button and select the **Preview** option. The purchase order is displayed in the Reports module, where the purchase order can be reviewed, as normal.

Additional information

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

Export financial data using new window

The NCM (Spader) Export window is now available for you to export financial data files that meet requirements from NCM Associates. This enhancement is especially useful for dealerships that use NCM Associates for financial reporting, benchmarking, and performance comparisons.



To access this window, click the new *NCM/Spader Export* link in the Accounting → Tools → Company section in the navigation pane.

Define settings for the export as needed and click the **Export** button to export the financial data. The exported files are saved as .csv files on the PC or network drive.

New security permission

- To grant an employee access to the NCM (Spader) Export window, select the **Setting** check box for the Accounting → **Allowed To Export NVM Spader Data** security permission on the Permissions 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.