MotilityAnywhere

Release Notes

Enhancements to MotilityAnywhere

4.5.20263.32370

September 2026

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4.5.20263.32370

Motility Software Solutions

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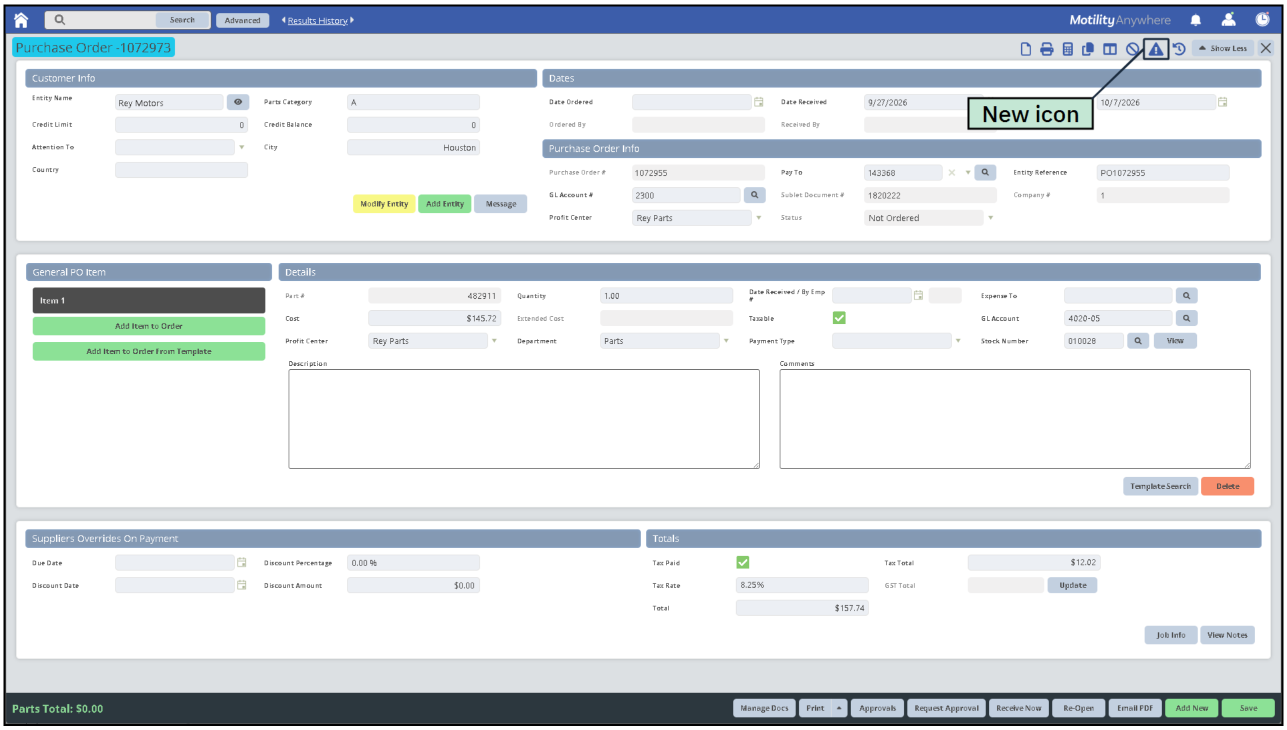
General

Quickly identify and add alert messages

You can now easily identify when an alert has been added on a window in MotilityAnywhere using the new (Alert) icon, which displays red when an alert message exists. When an alert message does not exist, the (Alert) icon displays blue. If you need to add an alert, you can easily use the (Alert) icon and enter an alert message in the Alert window.



Click the (Alert) icon to display the Alert window, where you can review or edit an existing alert message, as normal. To add a new alert message, click the (Alert) icon to display the Alert window, where a message can be entered.

The (Alert) icon displays on the following windows:

- Entity window in the CRM module
- Deal window in the Deal Desking module
- GL Account window in the Accounting module
- Parts Invoice window in the Parts & Service module
- Purchase Order window in the Accounting module and the Parts & Service module
- Quote window in the Deal Desking module
- Receiving window in the Parts & Service module

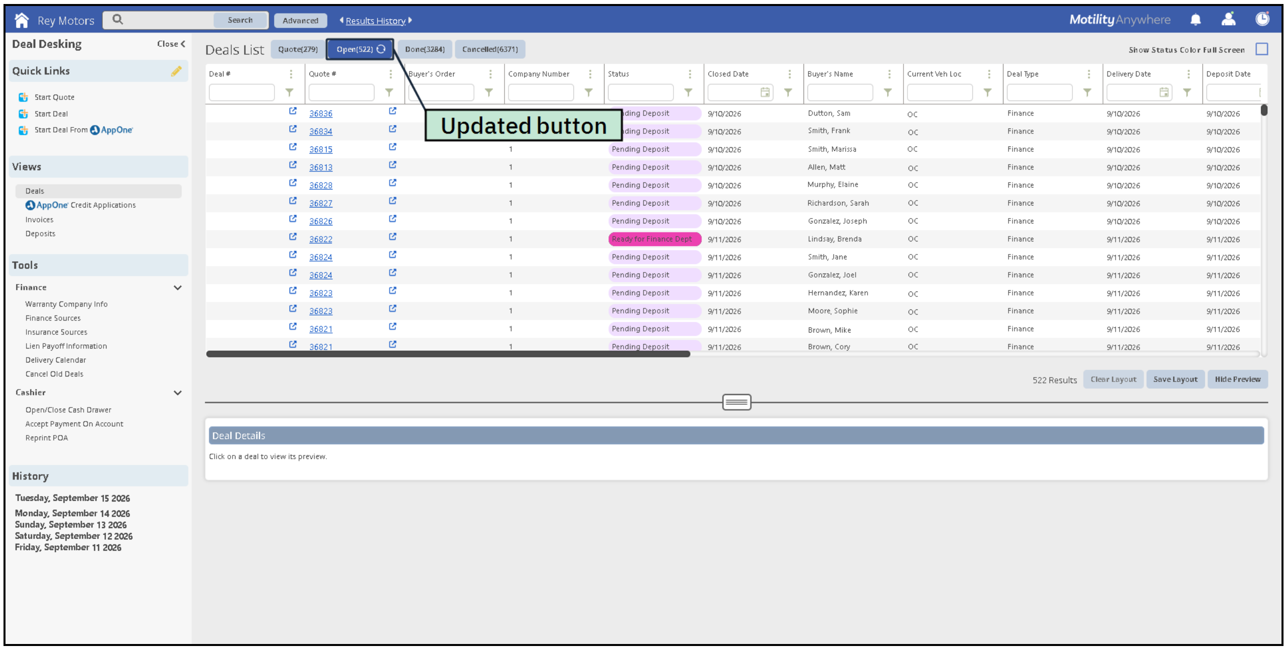
- Rental Invoice window in the Rental module
- Service Invoice window in the Parts & Service module
- Storage Details window in the Rental module
- Unit Profile window in the Unit Inventory module

Additional information

- The **Alert** button and the (Alert) icon have been removed from MotilityAnywhere.

Refresh filtered lists more intuitively

Filter buttons on various screens throughout MotilityAnywhere now display the new (Refresh) icon to more clearly indicate that these buttons can be clicked to refresh search results.



To refresh search results on a screen, such as the Deals List screen, simply click a filter button to filter search results, as normal. When the button is clicked, the new (Refresh) icon displays on the button. Click the same button again to display the most updated information, including changes made outside of the module, as needed.

The filter buttons on the following screens have been updated:

- AR Invoice List screen in the Accounting module
- Contacts List screen in the CRM module
- Deals List screen in the Deal Desking module
- Deposits screen in the Rental module
- Deposits List screen in the Deal Desking module and the Parts & Service module
- Parts Invoicing List screen in the Parts & Service module
- Parts Receiving List screen in the Parts & Service module
- Purchase Order List screen in the Accounting module and the Parts & Service module

- Rental Invoicing List screen in the Rental module
- Service Invoicing List screen in the Parts & Service module and the Rental module
- Unit Purchase Order List screen in the Unit Inventory module

Automatically open files on a new tab

When you open a file saved to an invoice, deal, or other item, the file now displays on a new tab of the Internet browser, allowing you to review and edit the file more easily.

To open a file on a new tab, click the **Manage Docs** button, which is available on multiple windows throughout MotilityAnywhere, such as the Service Invoice window in the Parts & Service module and the Deal window in the Deal Desking module. The Docs window displays, where you can review the files, as normal. Then simply double-click the file that should be opened. The file displays on a new tab of the Internet browser.

Miscellaneous General System enhancement

- When a screen that includes a field used to enter a phone number is displayed, and the field contains fewer than 10 digits, the field is highlighted in red to indicate that the phone number is incomplete. In addition, when an incomplete phone number is entered in one of these fields, a message displays to indicate the entered phone number is incomplete.

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.

Parts & Service

- GL Detail Report (Research) report. For more information, refer to page 64.

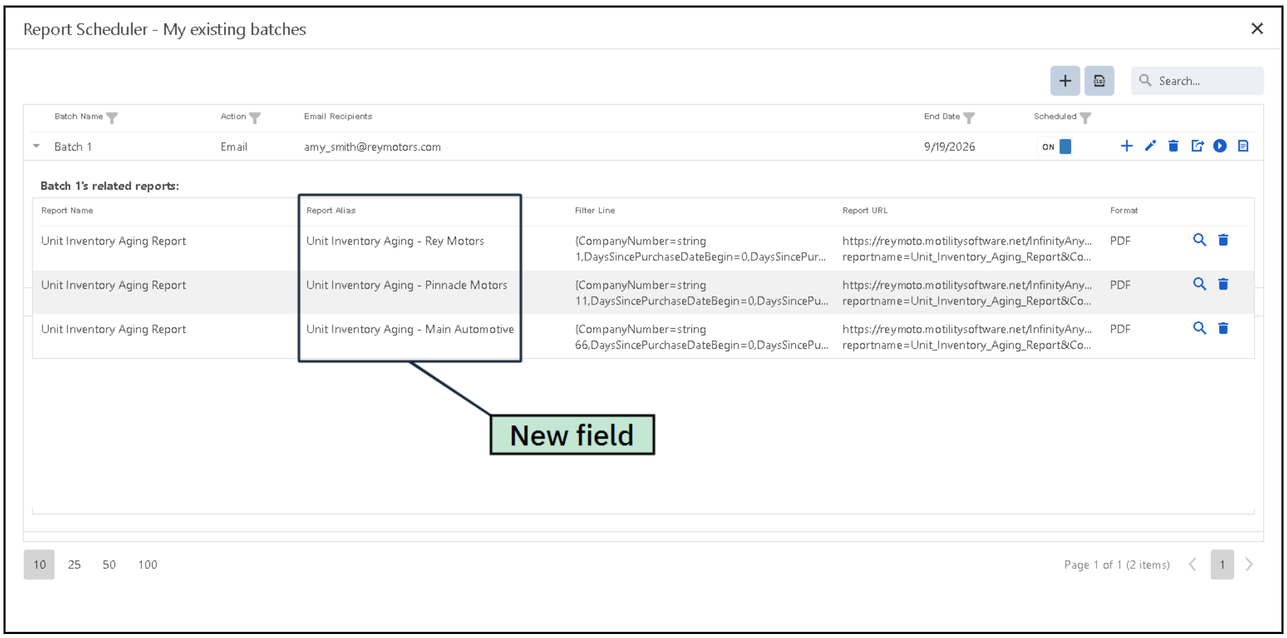
Accounting

- AR Aging reports. For more information, refer to page 68.
- Unit Inventory Transaction Detail report. For more information, refer to page 69.

Define a name for each report in a batch

When scheduling a batch of reports, you can now define a unique name for each report in the batch. This enhancement can be especially useful if you include the same report for multiple locations in a batch and then distribute the reports to managers at the corresponding locations.

For example, suppose there are four dealerships in your dealership group, and you schedule a batch to include a Unit Inventory Aging report for each location. You can now name each report to indicate the corresponding location so that when the reports are received, the appropriate recipients for each report can be determined more easily.



To define a unique name for a report within a batch, simply enter the name in the new **Report Alias** field for the report on the Reports Scheduler window. Once the batch is processed, the reports are sent to the designated recipient as attachments to Email messages, as normal, and the updated report names display for each attachment.

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.

Deal Desking

- AppOne Deals. For more information, refer to page 21.

Unit Inventory

- Inventory Aging Breakdown. For more information, refer to page 27.

Parts & Service

- Service Advisor Sales Analysis. For more information, refer to page 52.
- Warranty Clerk. For more information, refer to page 55.

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.

CRM

- CRM Lead Types. For more information, refer to page 33.
- CRM Sales Campaign. For more information, refer to page 34.

Parts & Service

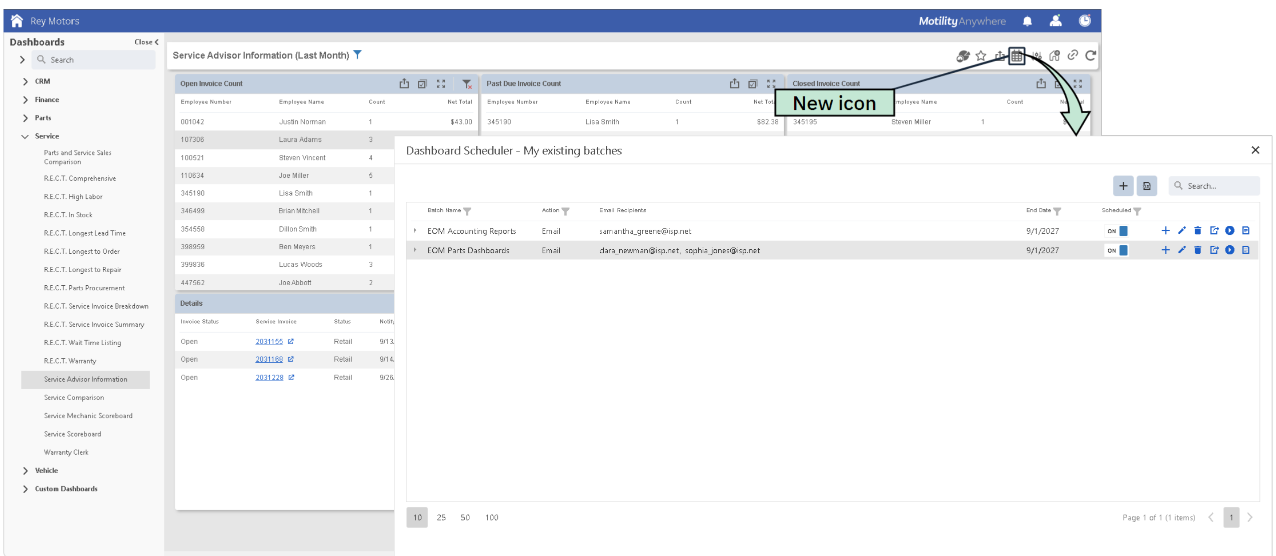
- Parts Comparison. For more information, refer to page 58.
- Service Scoreboard. For more information, refer to page 60.

Automatically export and send dashboard views to employees

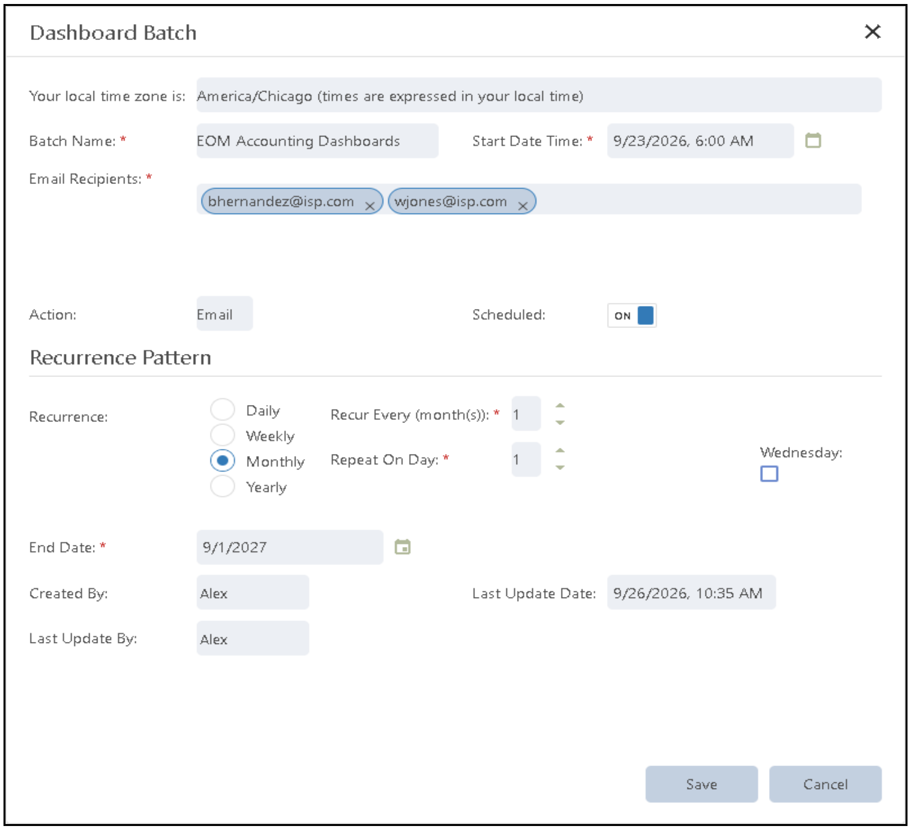
You can now set up dashboard views to be automatically exported and sent to employees as links and file attachments in Email messages on a predefined schedule. Using a new window, you can define one or more views to include in a batch, the frequency at which the exports occur, and the employees who should receive the exported views. With this enhancement, you can easily provide employees with the information needed to analyze performance in their areas at regular intervals.

For example, you can define one batch to include the Parts Comparison, Parts Daily Sales, and Parts Inventory views for parts managers and another batch to include the Inventory Aging Breakdown and Unit Inventory Value views for unit inventory managers. You can define the batches to be automatically exported every workday and sent to the corresponding managers in Email messages, saving time spent manually exporting and sending the views.

To add a new batch, click the new (Scheduler) icon. The new Dashboard Scheduler window displays.

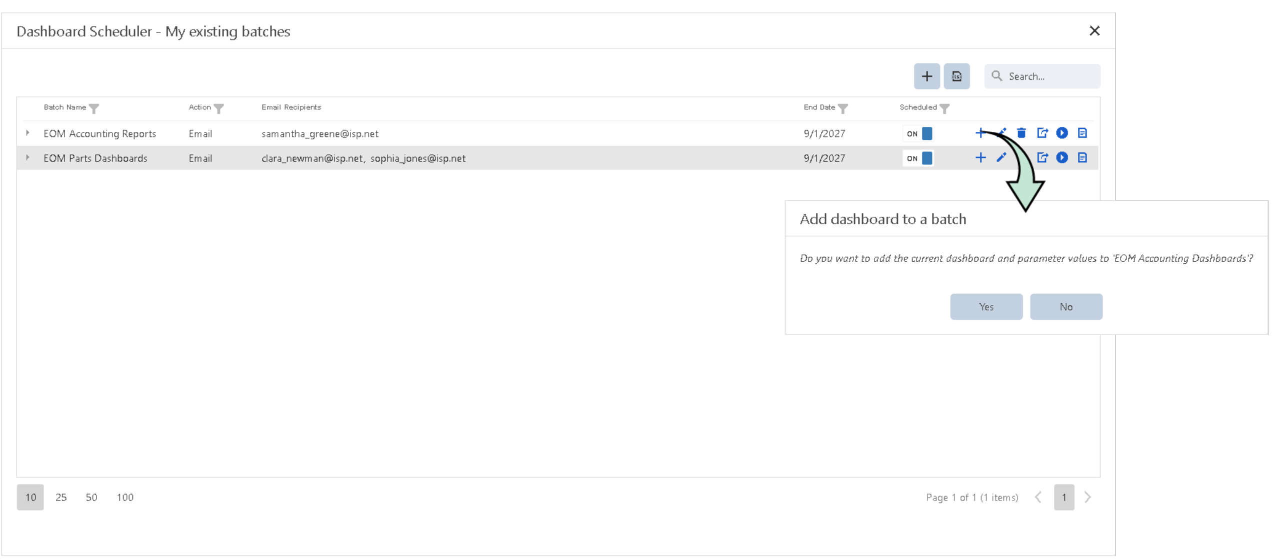


On this window, click the + (Add New Batch) icon to display the new Dashboard Batch window, where settings for the batch can be defined.



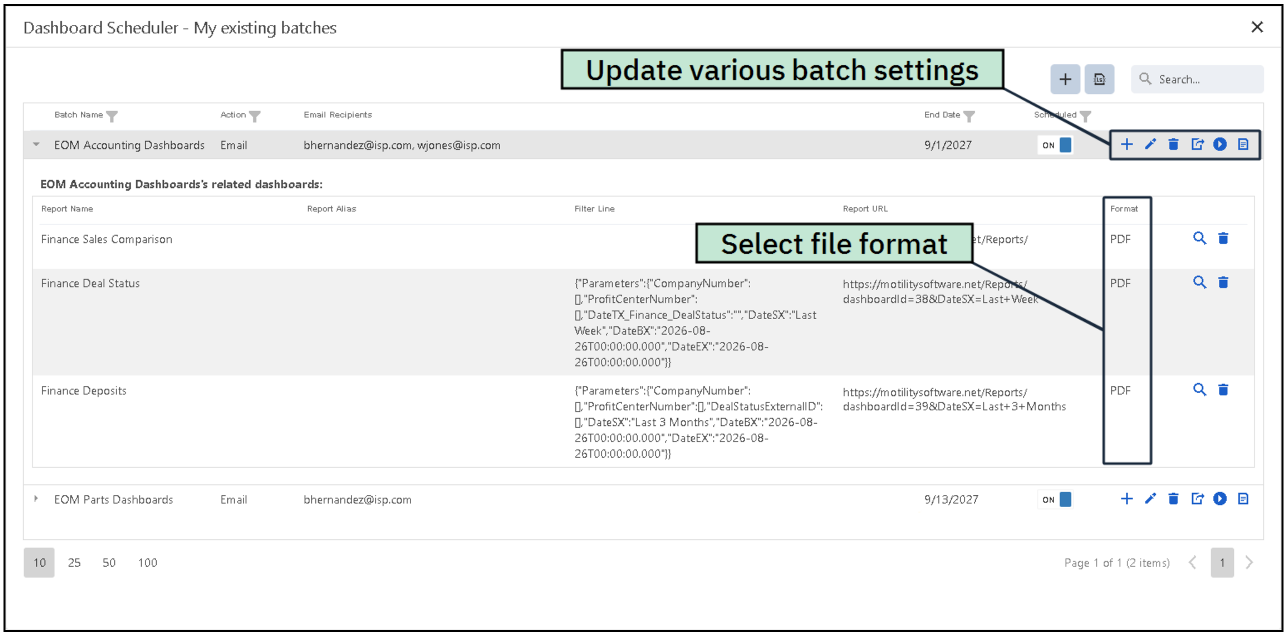
Simply enter a name for the batch, the start and end dates, the Email addresses for recipients, and the frequency to process the batch. Once all settings are defined, click the **Save** button to save the batch.

To add a view to the batch, simply access the view and define criteria for the view, as normal. Then click the (Scheduler) icon to display the Dashboard Scheduler window. On this window, click the + (Add Dashboard to Batch) icon for the batch to update. A message window display to confirm that the view should be added to the batch.



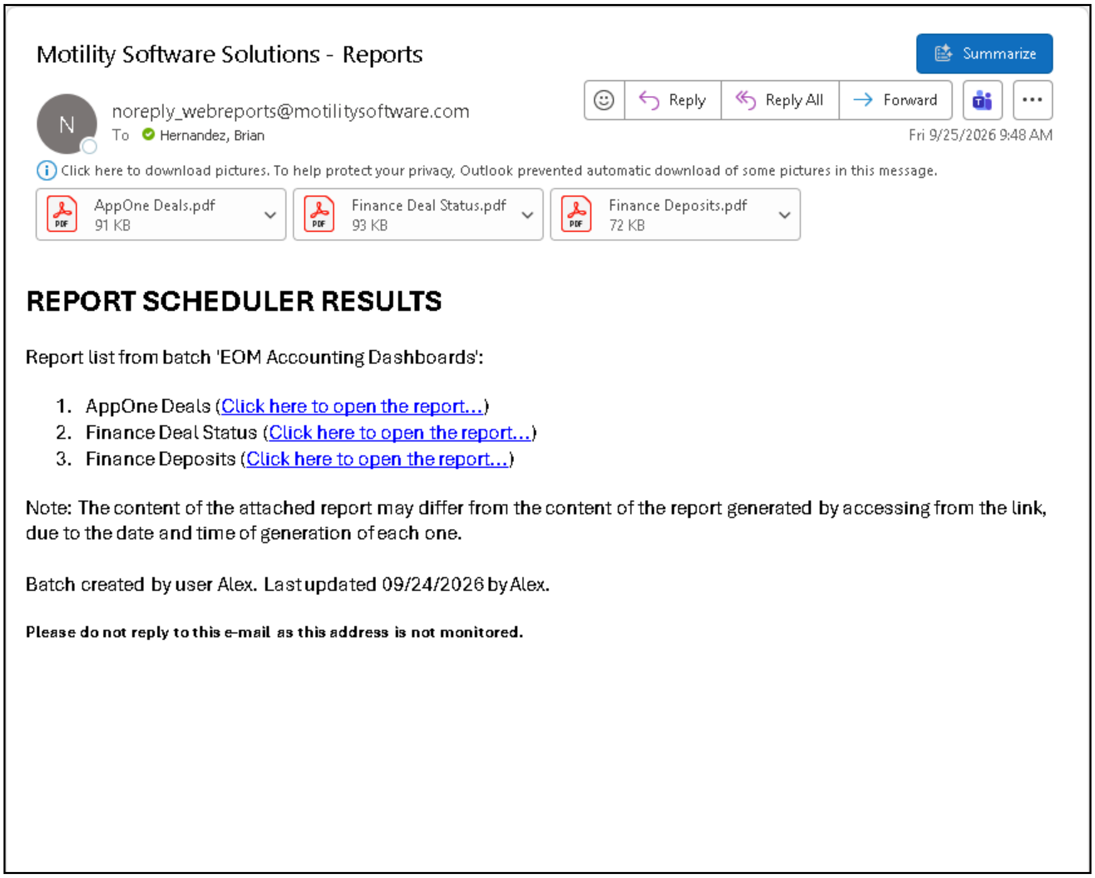
Click the **Yes** button to add the view to the batch. Complete the same process to add additional views to the batch as needed.

Batches that have been defined are listed on the Dashboard Scheduler window. Multiple options for updating batch information, such as adding a new view to the batch, editing the schedule, deleting the batch, and processing the batch manually, display for each batch.



To display the views included in a batch, click the ▸ (Expand Details) icon for the batch. For each view in the batch, options are available for you to preview or delete the view. In addition, the **Format** field can be used to update the file format used when the view is sent as an attachment to an Email message.

When a batch is processed, each view in the batch is sent to the defined recipients as attachments to Email messages.



Motility Software Solutions - Reports

Summarize

noreply_webreports@motilitysoftware.com

To Hernandez, Brian

Reply | Reply All | Forward

Fri 9/25/2026 9:48 AM

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

AppOne Deals.pdf 91 KB | Finance Deal Status.pdf 93 KB | Finance Deposits.pdf 72 KB

REPORT SCHEDULER RESULTS

Report list from batch 'EOM Accounting Dashboards':

1. AppOne Deals (Click here to open the report...)
2. Finance Deal Status (Click here to open the report...)
3. Finance Deposits (Click here to open the report...)

Note: The content of the attached report may differ from the content of the report generated by accessing from the link, due to the date and time of generation of each one.

Batch created by user Alex. Last updated 09/24/2026 by Alex.

Please do not reply to this e-mail as this address is not monitored.

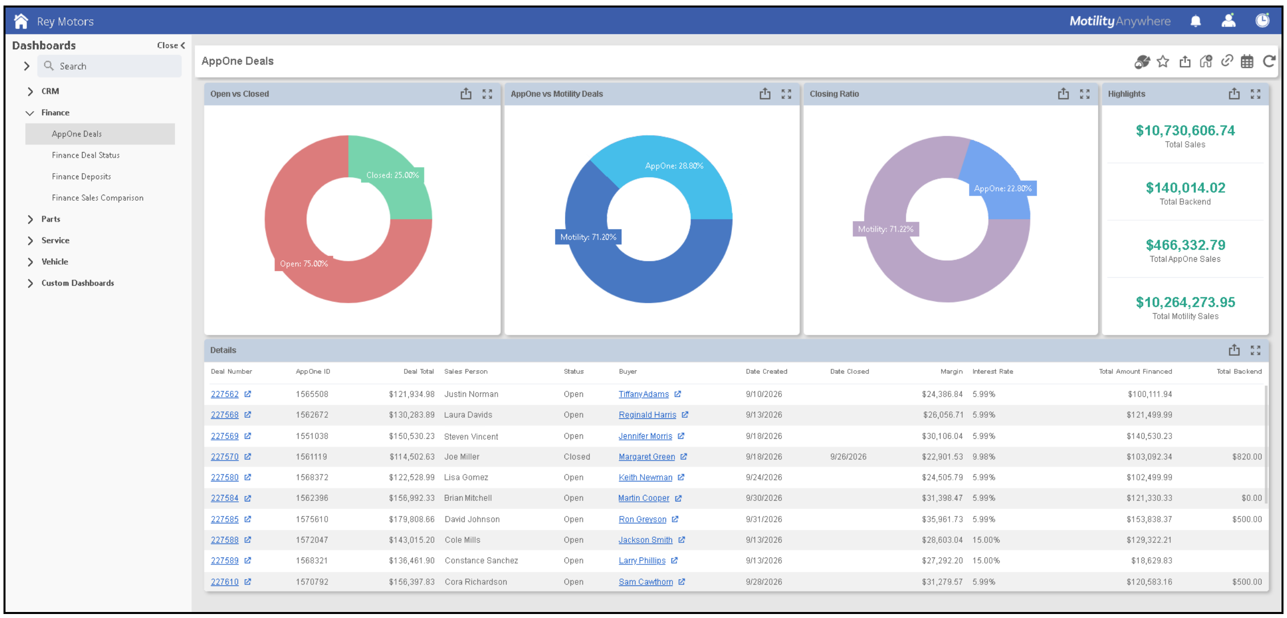
In addition, links to the views are included in the Email messages. Simply click the link for a view to display the view in the Dashboard module.

Front-End Enhancements

Deal Desking

Monitor AppOne deal information using a new Dashboard view

The AppOne Deals view is now available in the Dashboard module to allow you to monitor how effectively employees are utilizing AppOne to complete deals. Using this view, you can quickly access and review details for deals transferred to or from the AppOne® Portal application. In addition, you can compare metrics for deals worked in the AppOne® Portal application and deals worked only in MotilityAnywhere.



To access the AppOne Deals view, click the *AppOne Deals* link in the Finance section of the Dashboard menu.

The following sections display on the AppOne Deals view.

- **Open vs Closed.** This section displays the percentage of deals transferred to or from the AppOne® Portal application which are closed and the percentage of deals that are open.
- **AppOne vs Motility Deals.** This section displays the percentage of deals transferred to or from the AppOne® Portal application and the percentage of deals which were only worked in MotilityAnywhere.
- **Closing Ratio.** This section displays the percentage of closed deals that were worked in the AppOne® Portal application and the percentage of closed deals that were only worked in MotilityAnywhere.

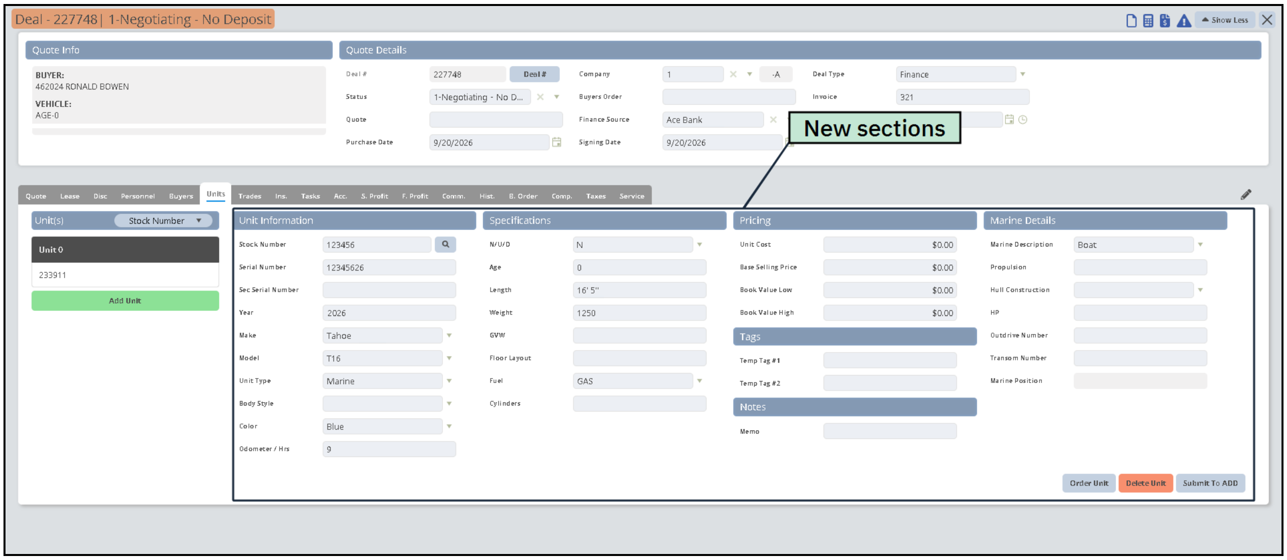
- **Highlights.** This section displays key metrics, including the total sales amount for all deals, the total back-end profit for all deals, the total sales amount for deals worked in the AppOne® Portal application, and the total sales amount for deals only worked in MotilityAnywhere.

- **Details.** This section displays details for deals transferred to or from the AppOne® Portal application, including the AppOne ID, status, and date created. Click a link in the **Deal Number** column to access the deal in the Deal Desking module, or click a link in the **Buyer** column to access the customer's entity record on the Entity window.

For more information about AppOne, contact your Account Manager.

Review and enter unit information more easily

The Units tab on the Deal window has been redesigned to help you review and update unit information for a deal information more easily. The Unit(s) section has been resized and fields have been reorganized into new sections for easy identification.



The following sections are now available on the Units tab.

- **Unit Information.** This section is used to enter general information about the unit, such as the make and model.
- **Specifications.** This section is used to enter unit specifications.
- **Pricing.** This section is used to enter pricing information for the unit.
- **Tags.** This section is used to enter the temporary license plate numbers to use for the unit.
- **Notes.** This section is used to enter additional information about the unit.
- **Marine Details.** This section displays details about marine units, such as the propulsion type and hull information.

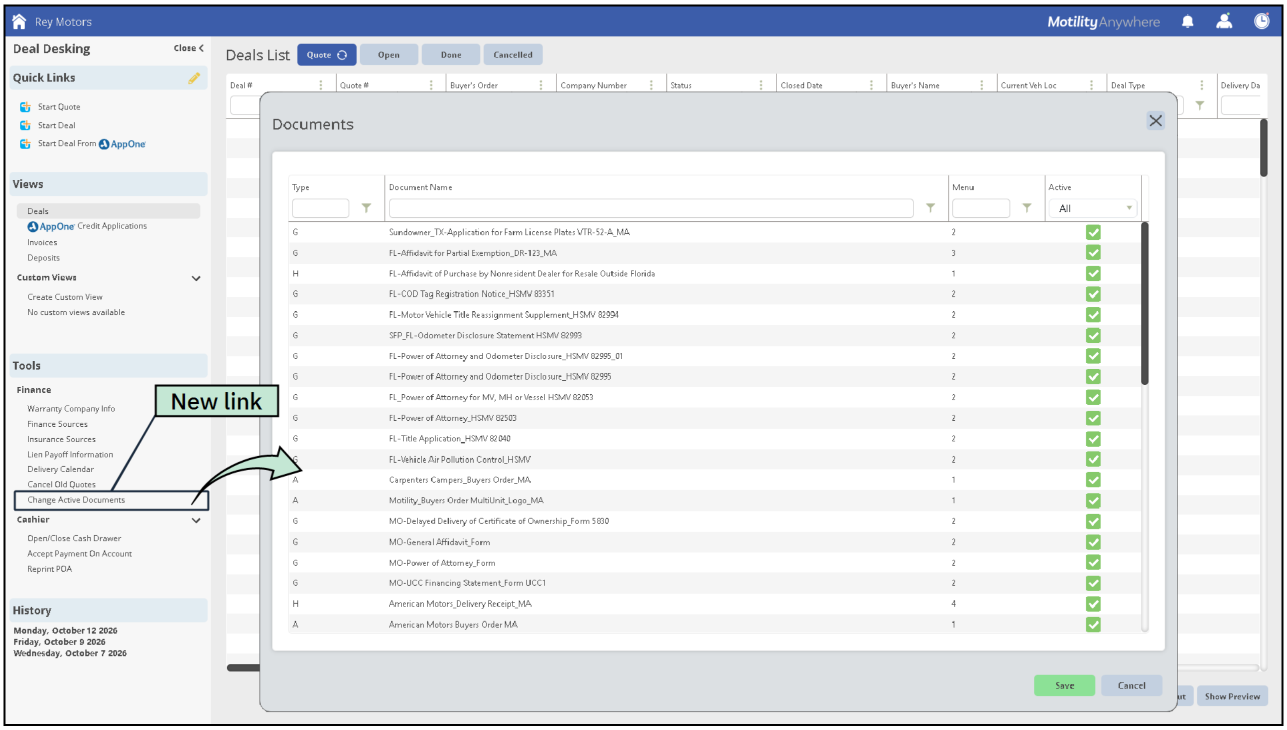
  Note - The Marine Details section only displays on deals for marine units.

Additional information

- The **Modify Buyer** button on the Buyers tab and the **Modify Inventory** button on the Units tab now display with a yellow background.

Review active documents more easily

Using a new link, you can access and review active documents directly from the Deal Desking menu. Previously, you were required to navigate to a deal to review active documents. Now, you can access the Documents window to review active documents from any screen where the Deal Desking menu displays.



To access the Documents window, simply click the new *Change Active Documents* link in the Finance section of the Deal Desking menu. The Documents window displays, where active documents can be reviewed, as normal.

*Note - To access the Documents window, the **Restrict From Modifying Active Documents** check box must be cleared on the Permissions window for the employee, as normal.*

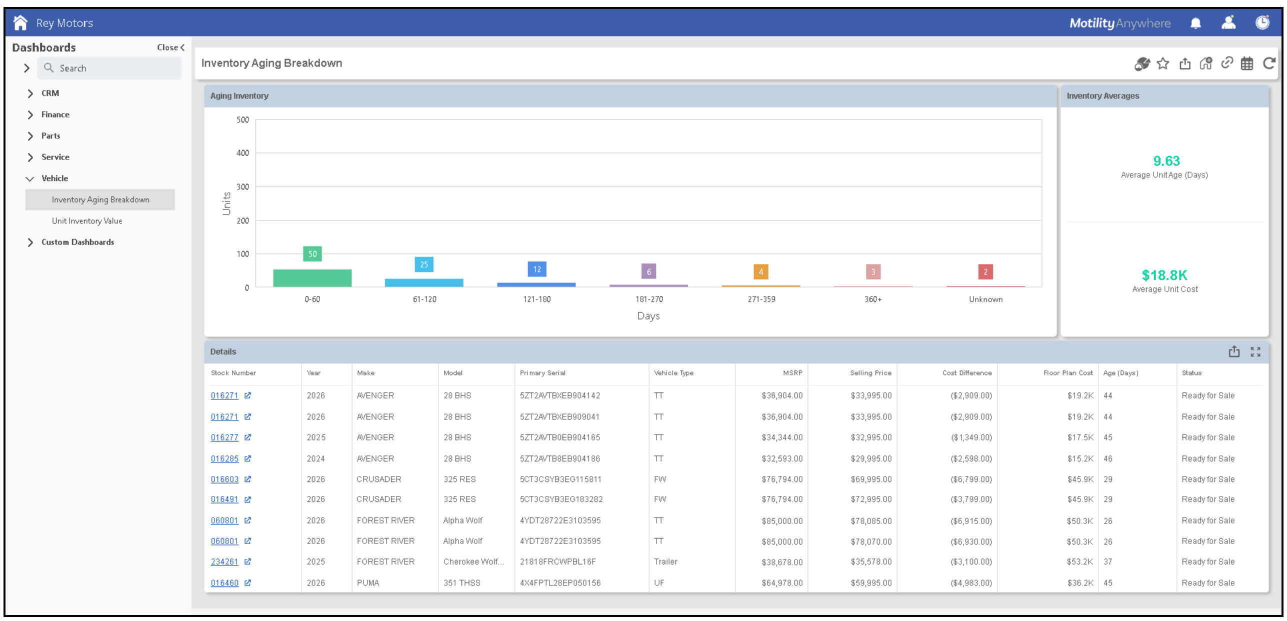
Miscellaneous Deal Desking enhancement

- When starting a quote on the Start Quote window or a deal on the Start Deal window, the last deal preset the user entered in the **Preset** field is automatically entered in the **Preset** field for the new quote or deal. With this enhancement, employees who often use the same presets can more efficiently start quotes and deals.

Unit Inventory

Monitor inventory aging information using a new Dashboard view

Using the new Inventory Aging Breakdown view in the Dashboard module, you can easily review aging information for units in inventory by the number of days each unit has been in stock. This view includes a graph that you can use to determine the number of units that have been in stock for various age ranges, such as 0-60 or 61-120 days in stock, and you can review details for each unit included in an age range. If you need to review additional details for a unit, you can drill down to the unit record directly from the view with a single click. In addition, the view can be used to determine at a glance the average number of days in stock and the average cost for all units included in the view.



To access this view, click the *Inventory Aging Breakdown* link in the Vehicle section of the Dashboard menu. In the Aging Inventory section, a bar graph illustrates the total number of units in Ready for Sale status for each age range. The average age and average cost for the units included in the view display in the Inventory Averages section.

Additional information for each unit included in the view displays in the Details section. You can click a bar in the graph to only display details for the units in the corresponding age range in the Details section, which can be useful for identifying the specific units that may require focus for marketing campaigns.

The following columns display in the Details section.

- **Stock Number.** This column displays the stock number for the unit as a link. Click the link for a stock number to display the corresponding unit record on the Unit Inventory window in the Unit Inventory module on a new tab of the Internet browser.
- **Year.** This column displays the model year for the unit.
- **Make.** This column displays the make for the unit.
- **Model.** This column displays the model for the unit.
- **Primary Serial.** This column displays the primary serial number for the unit.

  *Note - The primary serial number displayed in the **Primary Serial** field is defined using the **VIN** field on the Unit Inventory window in the Unit Inventory module.*
- **Vehicle Type.** This column displays the vehicle type for the unit.
- **MSRP.** This column displays the manufacturer suggested retail price (MSRP) for the unit.
- **Selling Price.** This column displays the selling price for the unit.
- **Cost Difference.** This column displays the difference in value between the MSRP and the selling price for the unit.
- **Floor Plan Cost.** This column displays the floor plan cost for the unit.
- **Age (Days).** This column displays the number of days in stock for the unit.
- **Status.** This column displays the current status of the unit.

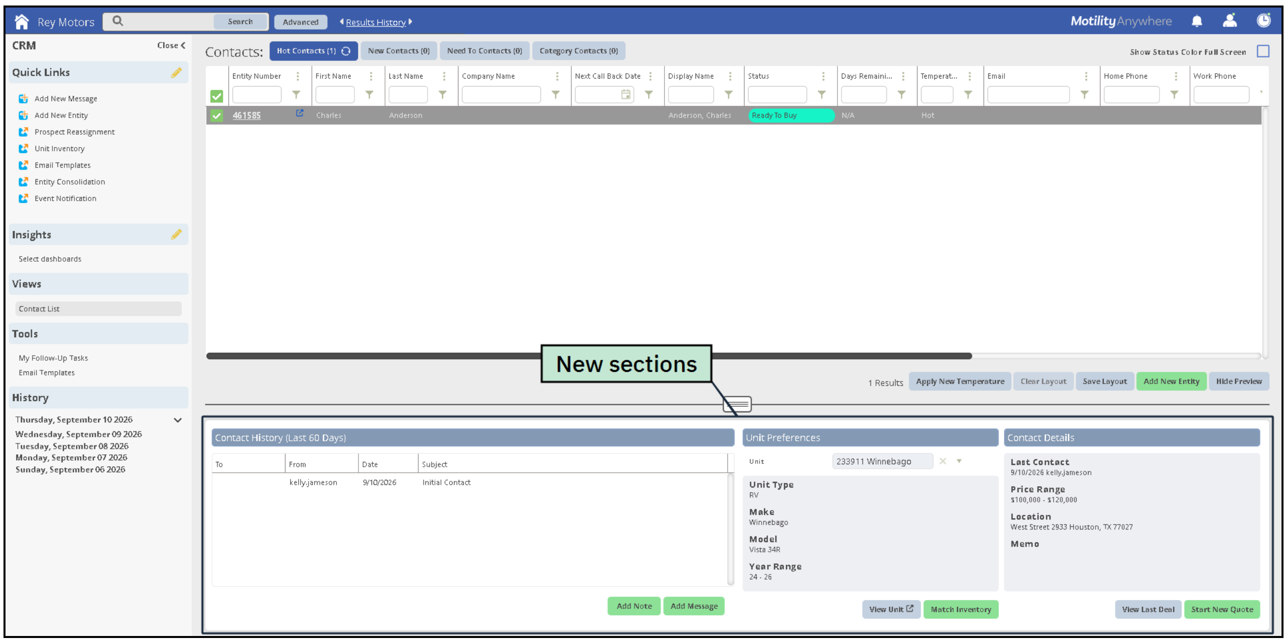
Miscellaneous Unit Inventory enhancement

- The **Unit Scanner Search** button has been renamed the **Unit Scanner** button in the Unit Inventory section on the Home Page screen in mobile view.

CRM

Perform functions and review information for entities quickly

The Contacts screen has been updated to include new sections that you can use to more efficiently perform various functions, such as adding customer notes and creating quote deals, and review detailed information regarding contact history and unit preferences for a customer. With this enhancement, you can perform more tasks for customers without navigating away from the Contacts screen, helping you manage prospects more easily.



The following sections now display when an entity is selected in the unlabeled Results section.

- **Contact History (Last 60 Days).** This section displays the customer's messaging history for the last 60 days, including notes, Email messages, and SMS text messages. Double-click a row in this section to access the Message window, where you can review the corresponding message.

  Click the **Add Note** button to access the Quick Comment window, where you can add a note which displays on the Messages tab on the customer's entity record.

  Click the **Add Message** button to access the New Message window, where you can send the customer an Email message. The customer's Email address is automatically entered in the **To** field on this window.

- **Unit Preferences.** This section displays information about the customer's unit preferences. In the **Unit** field, select a unit which was previously added on the Unit Prefs tab of the customer's entity record. Information for the selected unit, such as the make, model, and price range, displays in this section.

  Click the **Match Unit** button to access the Match Preferences window, where you can search for a unit that matches the customer's preferences.

  Click the **View Unit** button to access the Unit Inventory window, where you can review information about the selected unit.

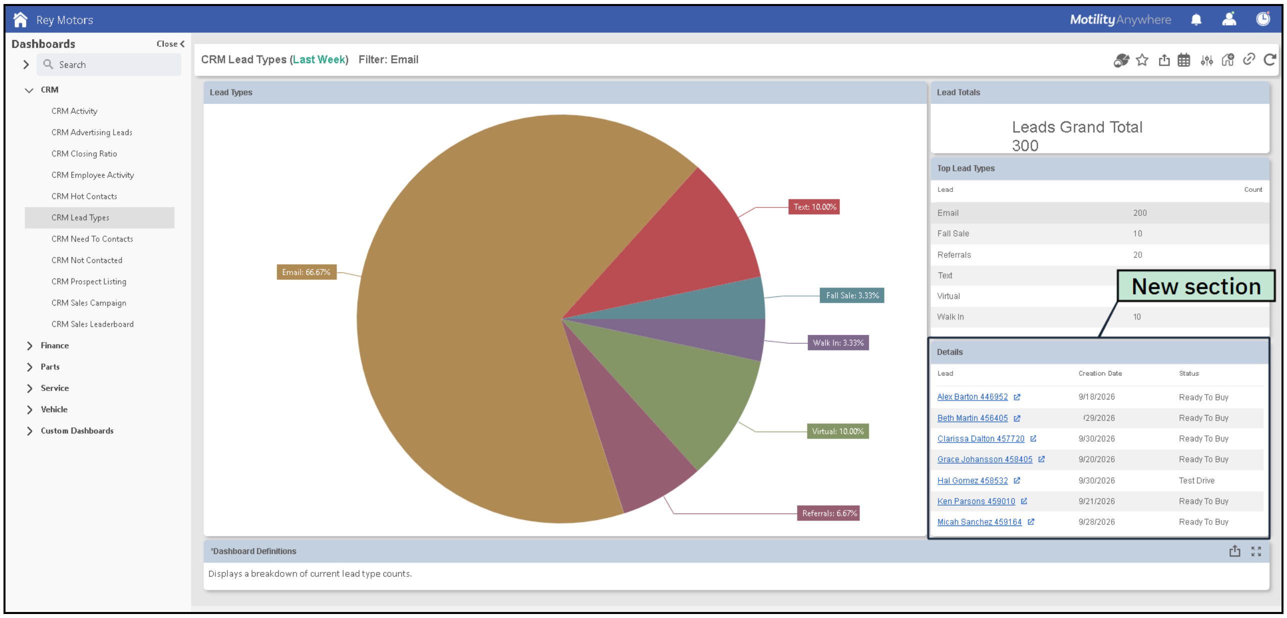
- **Contact Details.** This section displays information about interactions and special notes for the customer, such as the last date the customer was contacted, the preferred price range, address information, and any memos added.

  Click the **View Last Deal** button to access the Deal window, where you can review information about the customer's most recent deal.

  Click the **Start New Quote** button to access the Choose Preset window, where you can create a new quote for the customer.

Updated Dashboard view for reviewing lead types

The CRM Lead Types Dashboard view has been enhanced to include more details for the specific lead types 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 Top Lead Types section, previously the Top 5 Lead Types section, now displays a lead count for all lead types. Click a lead type in this section to display the corresponding leads in the new Details section.

The Details section displays a table with key information for each lead. The following columns display in the Details section.

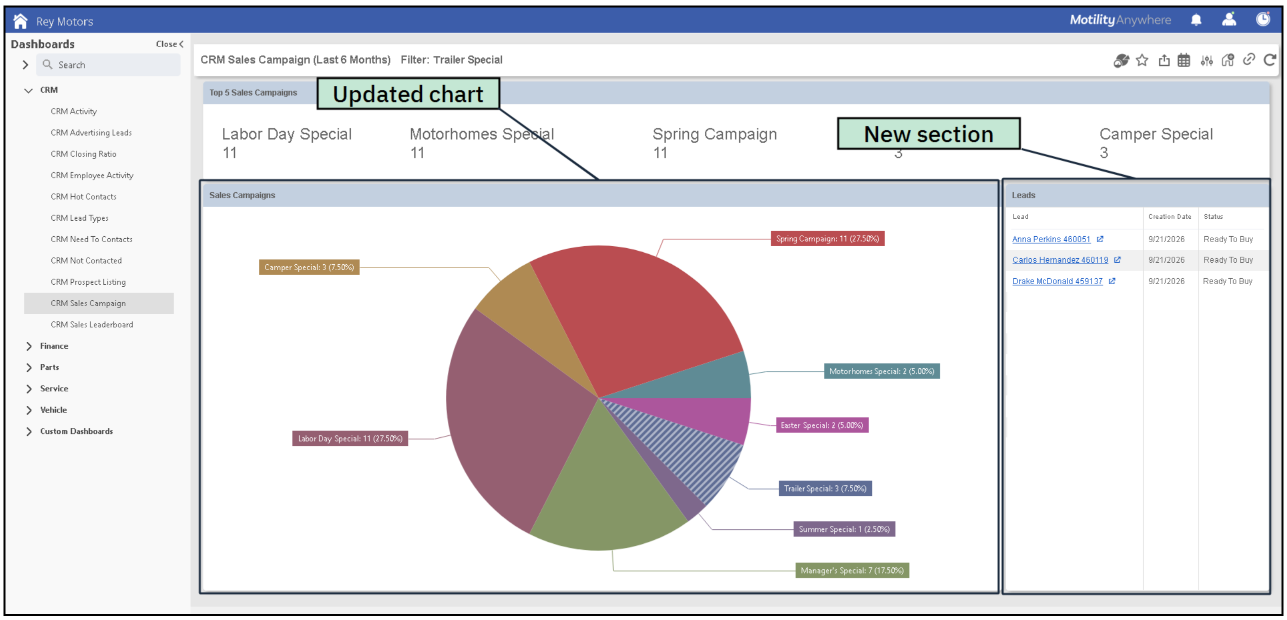
- **Lead.** This column displays the name and entity number of the lead as a link. Click this link to access the Entity window in the CRM module in a new tab of the Internet browser, where you can review detailed information for the lead.
- **Creation Date.** This column displays the date the lead was created.
- **Status.** This column displays the lead status for the customer.

Additional information

- The Lead Types Grand Total section has been renamed the Lead Totals section.

Updated Dashboard view for reviewing campaign leads

The CRM Sales Campaign Dashboard view has been enhanced to include more details for the specific campaign 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. In addition, the view has been reorganized, and updated labels have been added to the chart for you to more easily identify the campaigns included in the view.



The new Leads section displays a table with key information for each lead. The following columns display in the Leads section.

- **Lead.** This column displays the name and entity number of the customer as a link. Click this link to access the entity record in the CRM module in a new tab of the Internet browser, where you can review detailed information for the customer.
- **Creation Date.** This column displays the date the lead was created.
- **Status.** This column displays the lead status for the customer.

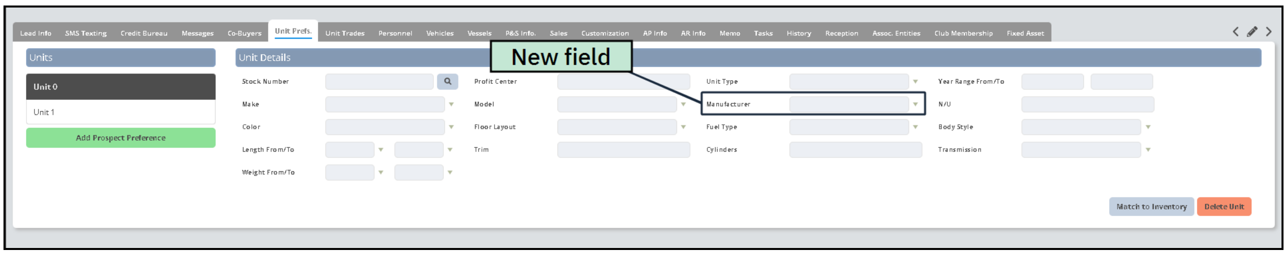
Click an area of the chart corresponding to a sales campaign to display data for leads obtained in the campaign in the Leads section. Alternatively, click a campaign in the Top 5 Sales Campaigns section to only display data for that campaign.

Additional information

- The Top 5 Sales Campaigns section has been moved to the top of the view.

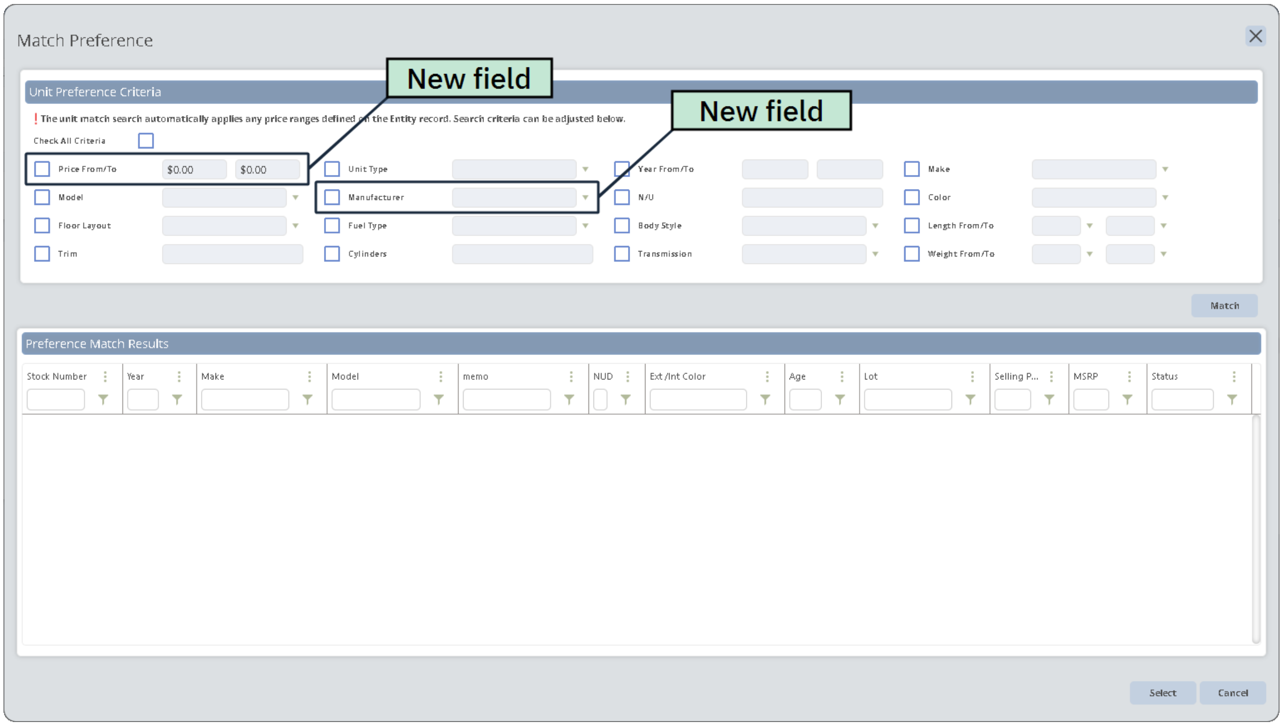
Define and match unit preferences more effectively

Several enhancements are available to help you define additional details for customer unit preferences and to search for unit preference matches more easily. When adding unit preferences details for a customer, you can now define a specific manufacturer for the preferred unit. Price ranges and manufacturer preferences can also be entered as criteria when searching for preferred units. In addition, the Unit Prefs tab on the Entity window and the Match Preference window have been reorganized and now display in a more intuitive layout.



On the Unit Prefs tab of the Entity window, you can now specify a preferred manufacturer for a customer using the new **Manufacturer** field.

On the Match Preference window, the new **Manufacturer** field and the new **Price Range From/To** fields are available for you to narrow the unit search results by manufacturer and price range. If manufacturer and price preferences are defined for the customer on the Unit Prefs tab, the information is automatically entered on the Match Preference window, but can be changed.



Additional information

- The **Match Vehicle** button has been renamed the **Match to Inventory** button.
- On the Unit Prefs tab and the Match Preference window, the **Year Range From** field and the **Year Range To** field now display as the **Year Range From/To** fields.
- On the Unit Prefs tab and the Match Preference window, the **Length Range From** field and the **Length Range To** field now display as the **Length Range From/To** fields.
- On the Unit Prefs tab and the Match Preference window, the **Weight Range From** field and the **Weight Range To** field now display as the **Weight Range From/To** fields.
- On the Match Preference window, you can now manually enter values in fields that include pick lists of valid entries.
- On the Match Preference window, the unlabeled Criteria section has been renamed the Unit Preference Criteria section.
- On the Match Preference window, the unlabeled Results section has been renamed the Preference Match Results section.
- On the Match Preference window, the **Close** button has been renamed the **Cancel** button.

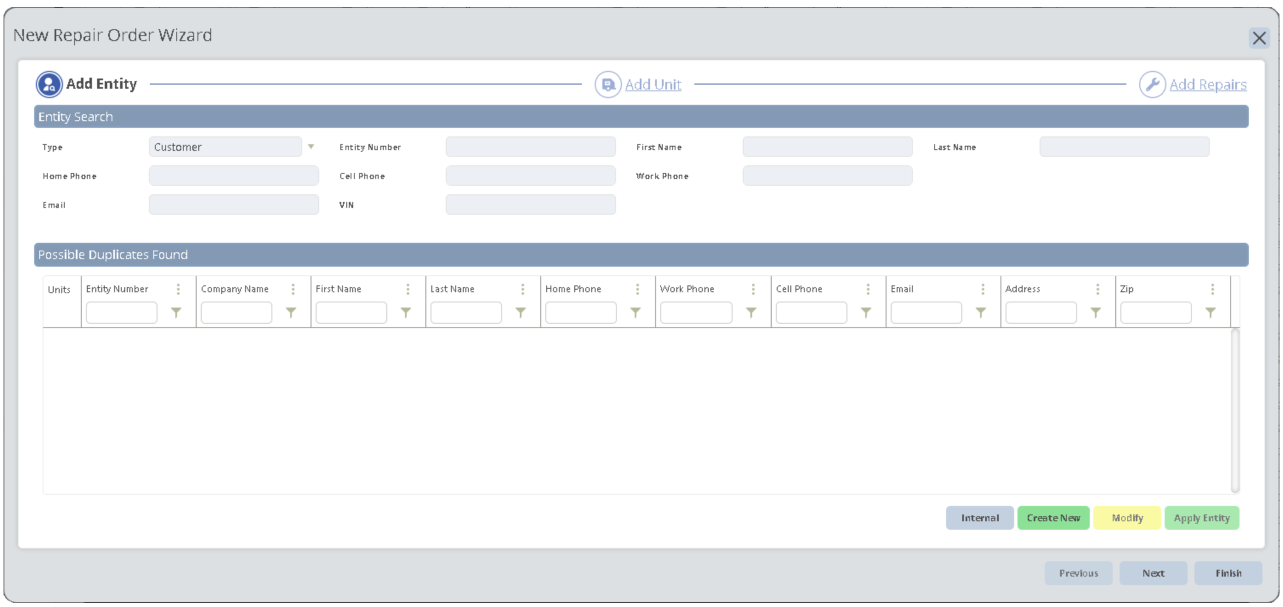
Fixed Operations Enhancements

Parts & Service

Easily create service estimates and repair orders using the new Service Invoice Wizard

The new Service Invoice Wizard is available to help you add estimates and repair orders using a more streamlined, intuitive process. When adding an estimate or repair order using the Service Invoice Wizard, you are prompted to enter required information for an entity, a unit, and repairs in simple, sequential steps, helping you complete the tasks more easily.

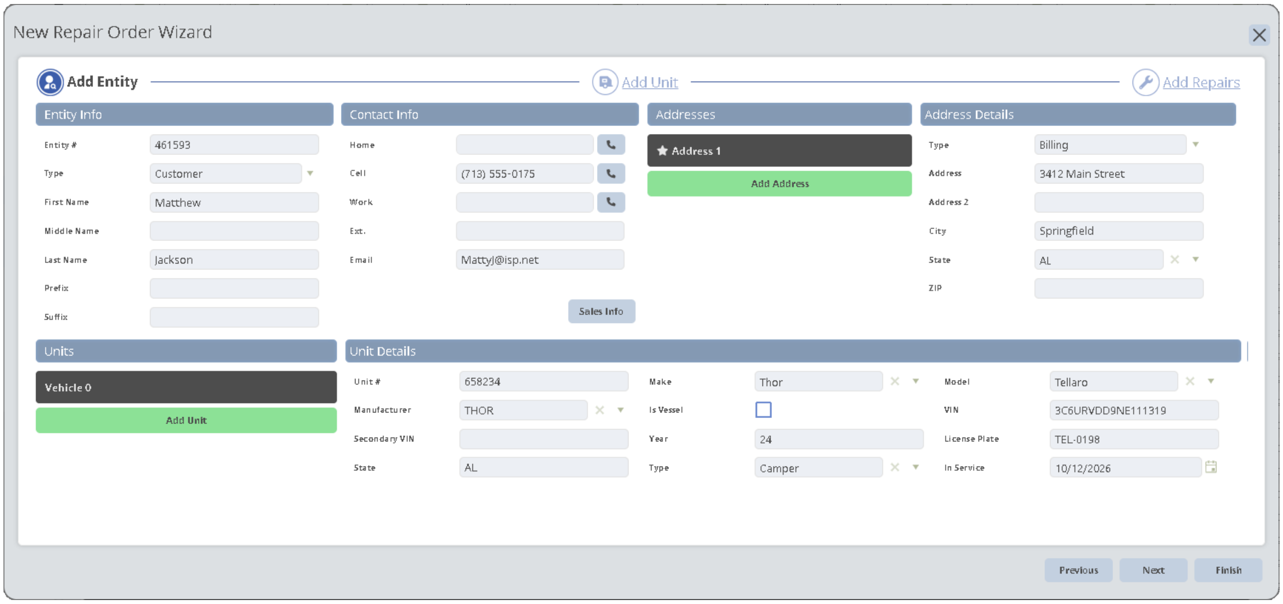
To add an estimate or repair order using the Service Invoice Wizard, simply click the *New Repair Estimate* link or the *New Repair Order* link in the Quick Links section on the Parts and Service menu. The Service Invoice Wizard displays on the New Repair Estimate Wizard window or the New Repair Order Wizard window in Add Entity mode, where you can add an entity for the estimate or repair order.



Note - The images in this announcement are used to illustrate the process of adding a repair order using the Service Invoice Wizard; however, the steps used to add an estimate using the Service Invoice Wizard are similar.

If you need to add an internal estimate or repair order, simply click the **Internal** button to continue the process without adding an entity.

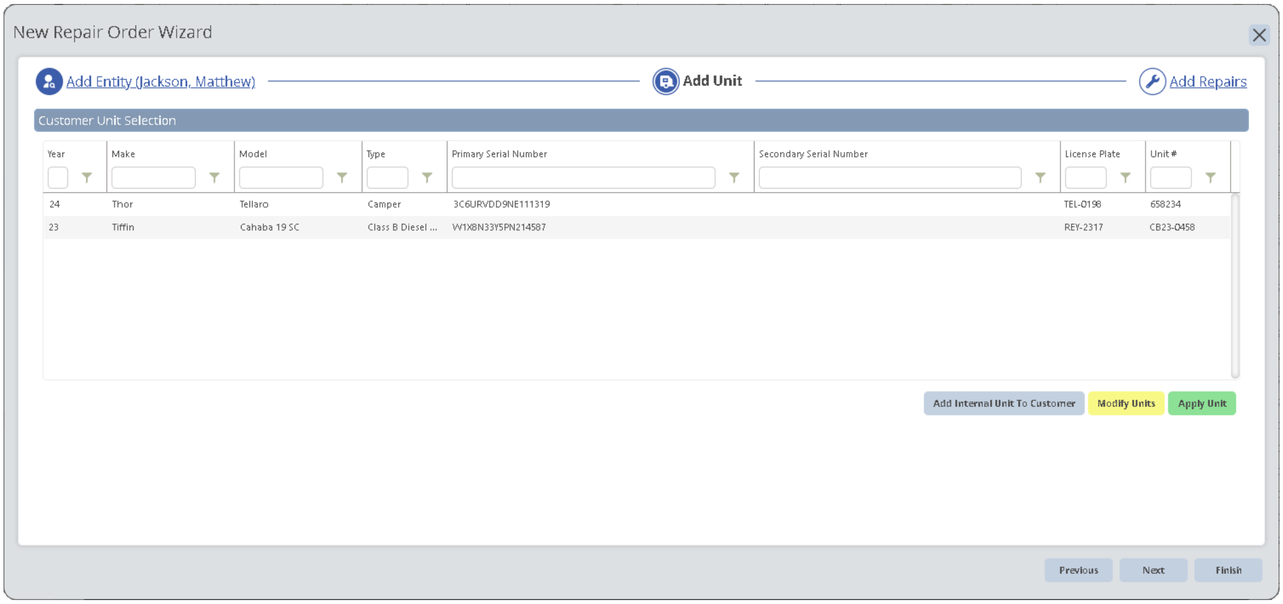
If the estimate or repair order is for a new entity, click the **Create New** button on the New Repair Estimate Wizard window or the New Repair Order Wizard window. Enter information for the entity as needed and click the **Next** button to add the entity to the estimate or repair order.



To add an existing entity to the estimate or repair order, enter criteria for the entity in the Entity Search section to display matching entities in the Possible Duplicates Found section. Select an entity in the Possible Duplicates Found section and click the **Apply Entity** button to add the entity to the estimate or repair order.

If changes to the entity information are required before adding the entity, such as when the unit requiring repairs is not currently added for the entity, click the **Modify** button to display fields used to update the entity details. Update the entity details as needed and click the **Next** button to add the entity to the estimate or repair order.

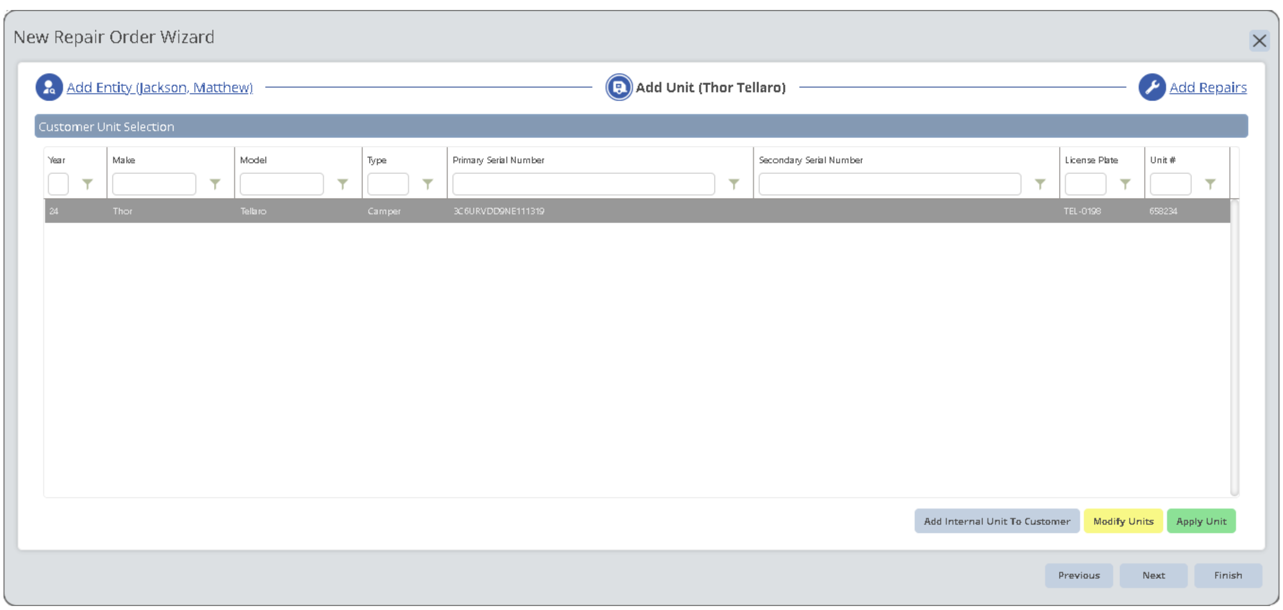
Once an entity is added to the estimate or repair order, the Service Invoice Wizard displays in Add Unit mode, where a unit for the estimate or repair order can be selected or added. The (Add Unit) icon at the top of the New Repair Estimate Wizard window or the New Repair Order Wizard window displays dark blue to indicate the mode change.



The units associated with the entity automatically display in the Customer Unit Selection section. Select a unit and click the **Apply Unit** button to add the unit to the estimate or repair order.

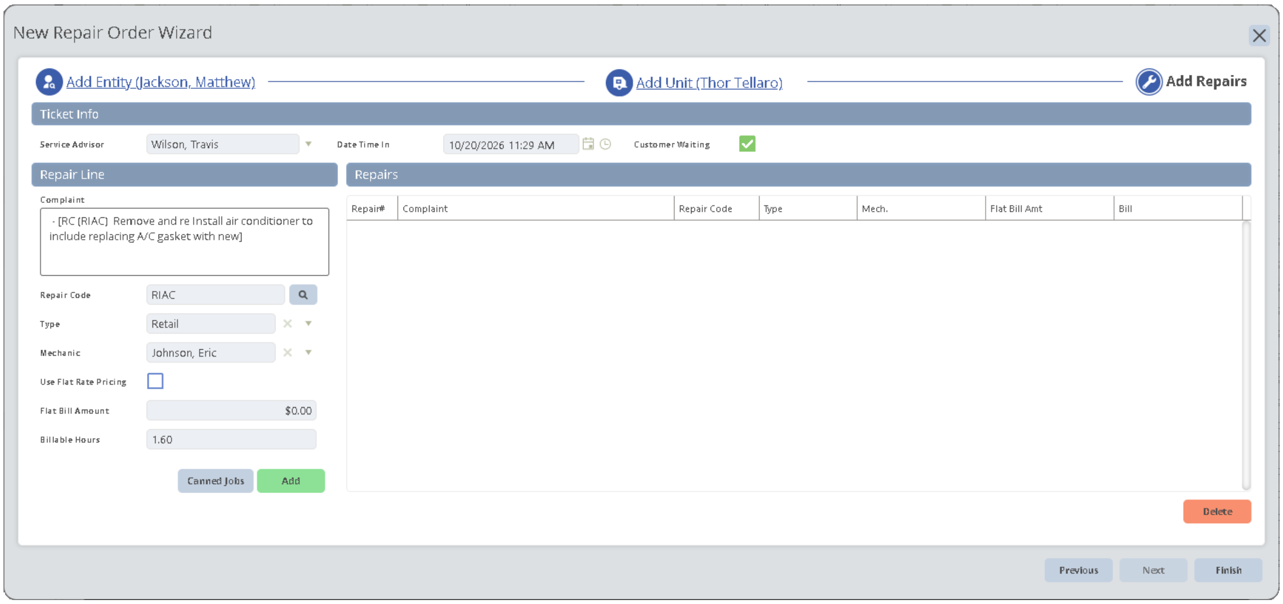
If changes to an associated unit are required, select the unit and click the **Modify Units** button to display fields used to update the unit details. Update the unit details as needed and click the **Next** button to add the unit to the estimate or repair order.

To add a unit in inventory to the estimate or repair order, click the **Add Internal Unit To Customer** button. The Inventory Search section displays, where you can search for and select a unit for the estimate or repair order.



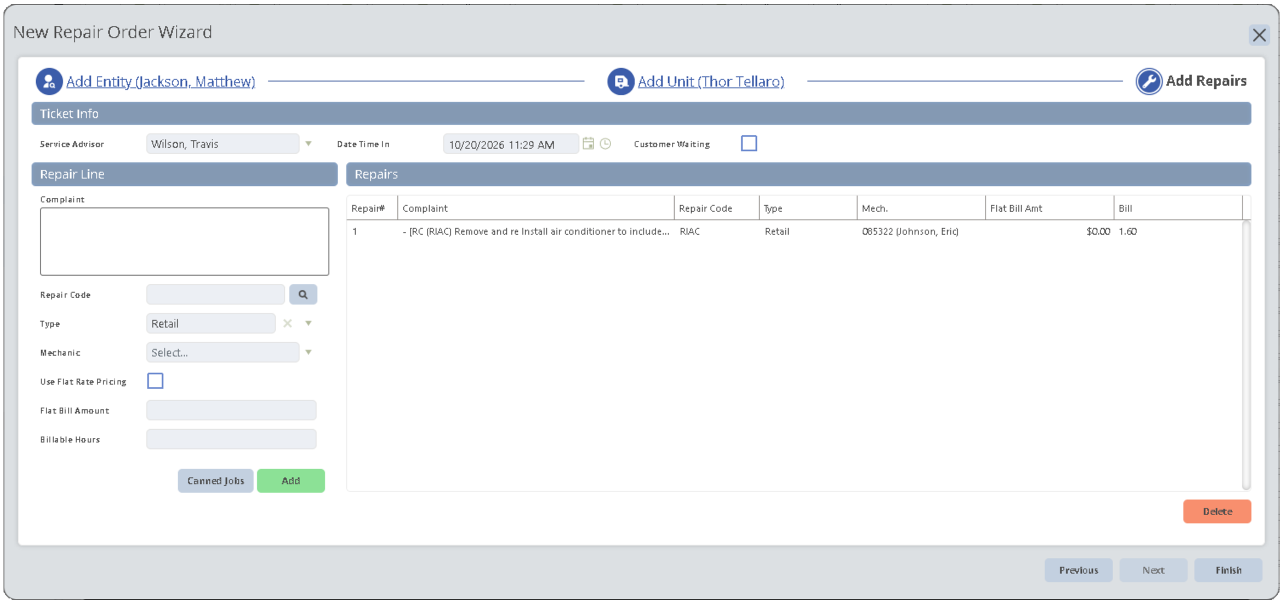
Simply enter criteria in the **Search For** field and the **Search By** field and click the **Search** button to display matching units in the unlabeled Search Results section. Then select a unit and click the **Apply Unit** button to add the unit to the estimate or repair order.

Once a unit is added to the estimate or repair order, the Service Invoice Wizard displays in Add Repairs mode, where jobs for the estimate or repair order can be added. The (Add Repairs) icon at the top of the New Repair Estimate Wizard window or the New Repair Order Wizard window displays dark blue to indicate the mode change.



In the Ticket Info section, you can define the advisor and the date and time the unit was brought in for repairs. You can also indicate that the customer is waiting for the repair by selecting the **Customer Waiting** check box.

To add repairs to the estimate or repair order, add details of the repair in the Repair Line section, such as the customer complaint, the repair code, and the type of repair. Click the **Add** button to add the repair to the estimate or repair order. In addition, to add canned jobs to the estimate or repair order, click the **Canned Jobs** button to display the Canned Job Search window, where a search for canned jobs can be performed. When a canned job is selected, the canned job automatically displays in the Repairs section.



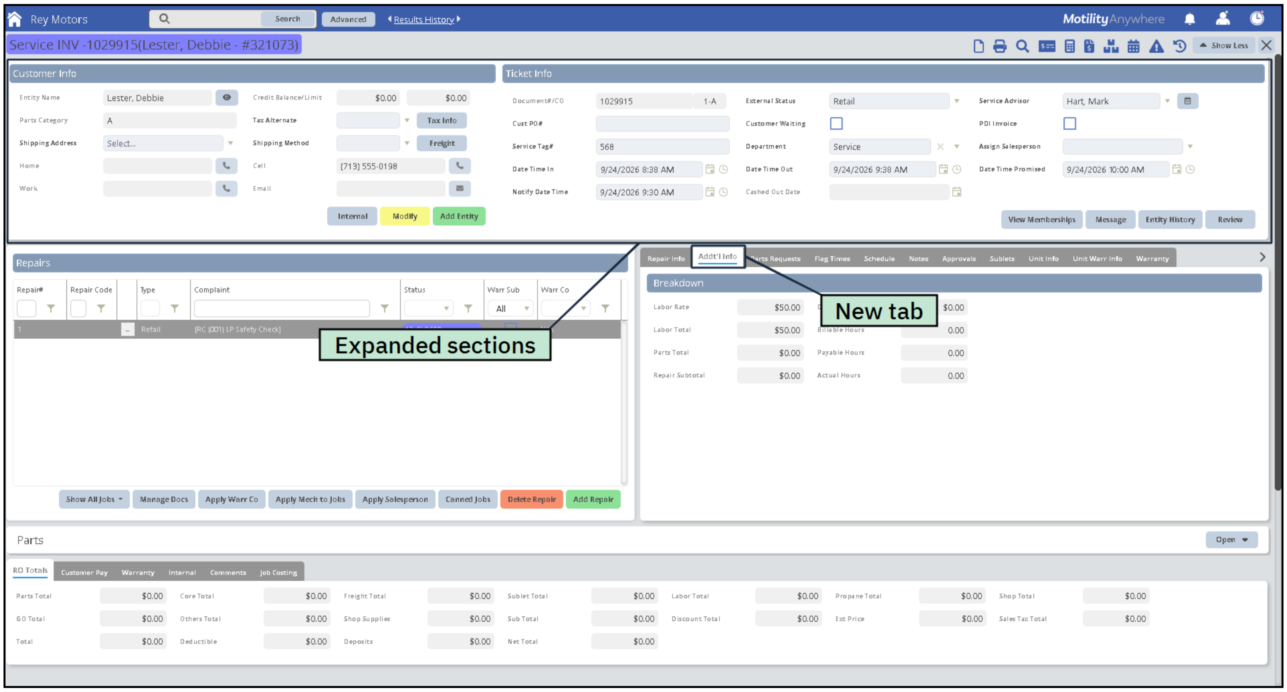
When all repairs have been added, click the **Finish** button. The Service Invoice window automatically displays, where additional details, such as parts information and warranty information, can be added, as normal.

Additional information

- You can still create new estimates and repair orders using the Service Invoice window, as normal.
- You can navigate between modes on the New Repair Estimate Wizard window or the New Repair Order Wizard window by clicking the icons for the mode or by clicking the **Previous** button and the **Next** button.

Updated Service Invoice window

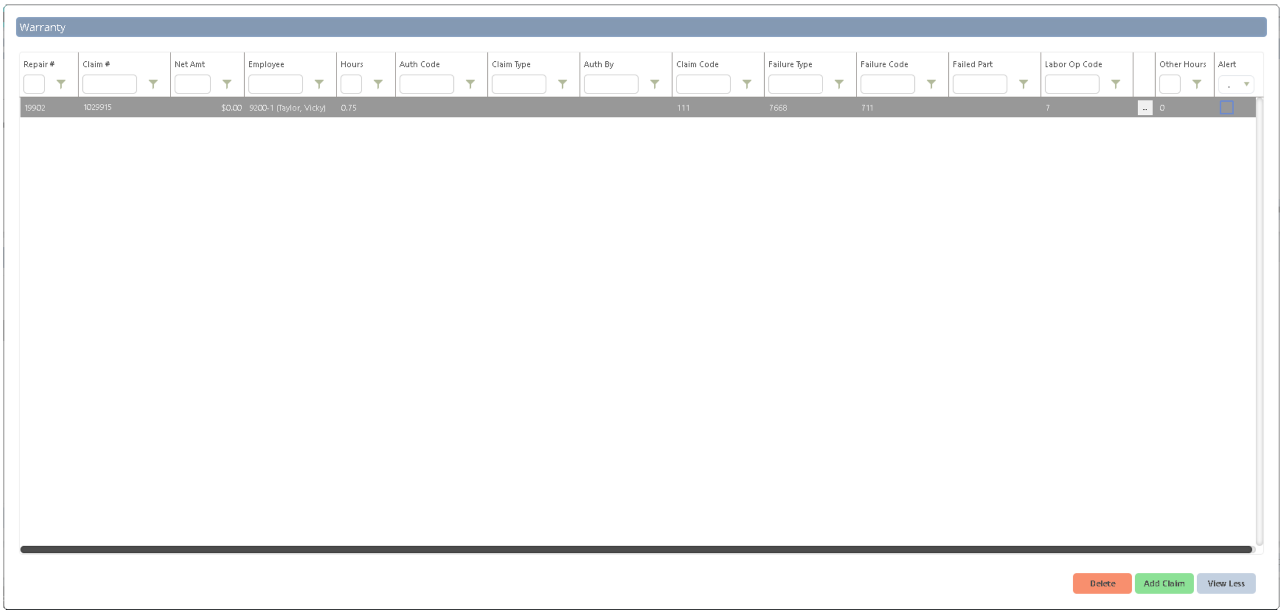
The Service Invoice window has been redesigned to help you add and review repair order information more easily.



The following enhancements are available for the Service Invoice window.

- The information previously displayed on the Customer Info tab and the Ticket Info tab now displays side by side in the new Customer Info section and the Ticket Info section.
- When the **Show Less** button is clicked, the Repairs section continues to display. In addition, this section now displays below the Customer Info section and the Ticket Info section and to the left of the tabs which display information on repair orders.
- The tabs which display information on repair orders have been reorganized to display in a more intuitive format.
- The Breakdown section, previously located on the Repair Info tab, has been moved to the new Addt'l Info tab. In addition, the Internal Info section, the Policy Info section, and the Warranty Info section now display on the new Addt'l Info tab based on the type of work being done on the repair order.
- The information previously reviewed and modified on the Policy Information window is now reviewed and modified in the Policy Info section on the Addt'l Info tab. The **Additional Policy** button, previously used to access the Policy Information window, has been removed.

- The Repair Info tab has been reorganized into the unlabeled Cause/Correction section, the unlabeled Unit Information/Labor Time Summary section, and the Repair Code section.
- The Flag Times tab has been redesigned to display in a more visually appealing format. In addition, the **Clock Out** button and the **Delete** button have been moved to the bottom of the tab, and the **Mechanic Flag Time** button has been renamed the **Add Mech Clock In** button.
- For warranty repair orders, the most commonly used fields now display on the Warranty tab. Click the new **View More** button on the Warranty tab to display the new Warranty window, where additional information about warranty repair lines can be reviewed and modified.

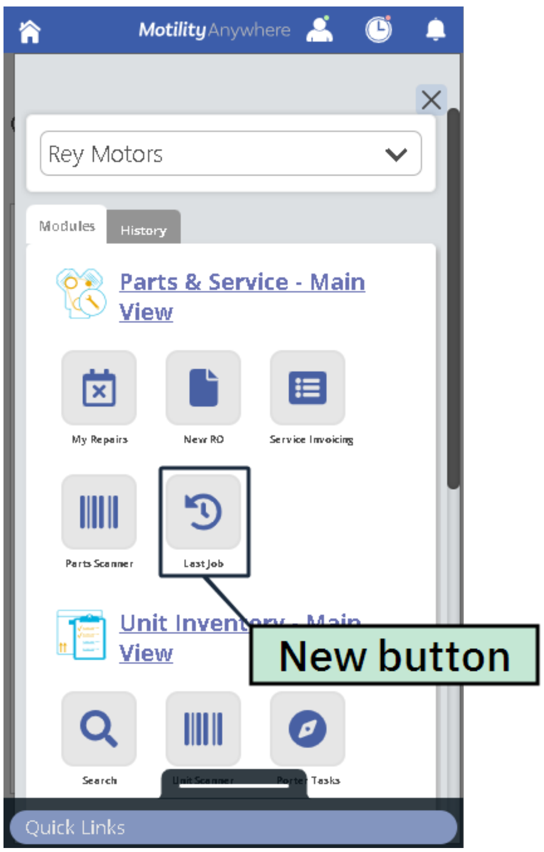


Note - Similar updates have been made to the mobile view of the Parts & Service module.

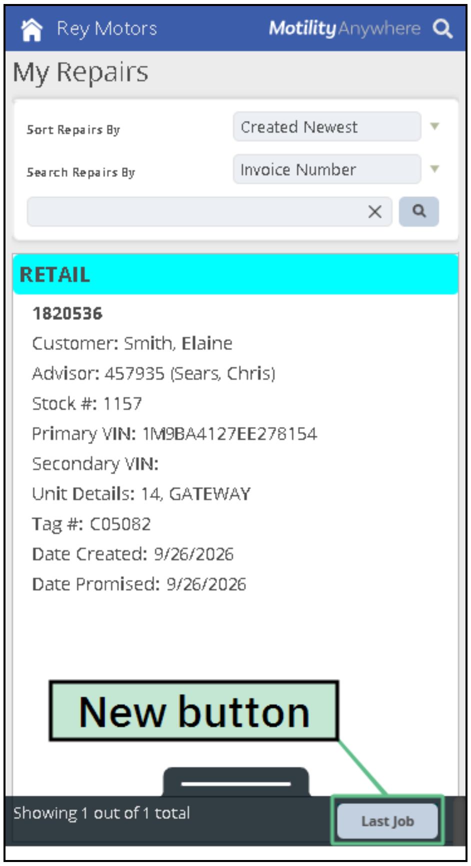
Navigate to the last repair job or service invoice more quickly

Service technicians using mobile view can now quickly access the last repair order and job or service invoice to which they clocked in. This enhancement can be especially useful for technicians when signing back on to MotilityAnywhere to return to a repair order in progress.

Simply tap the new **Last Job** button on the Home Page screen to display the Job window or service invoice you last clocked in to before navigating away or signing off.

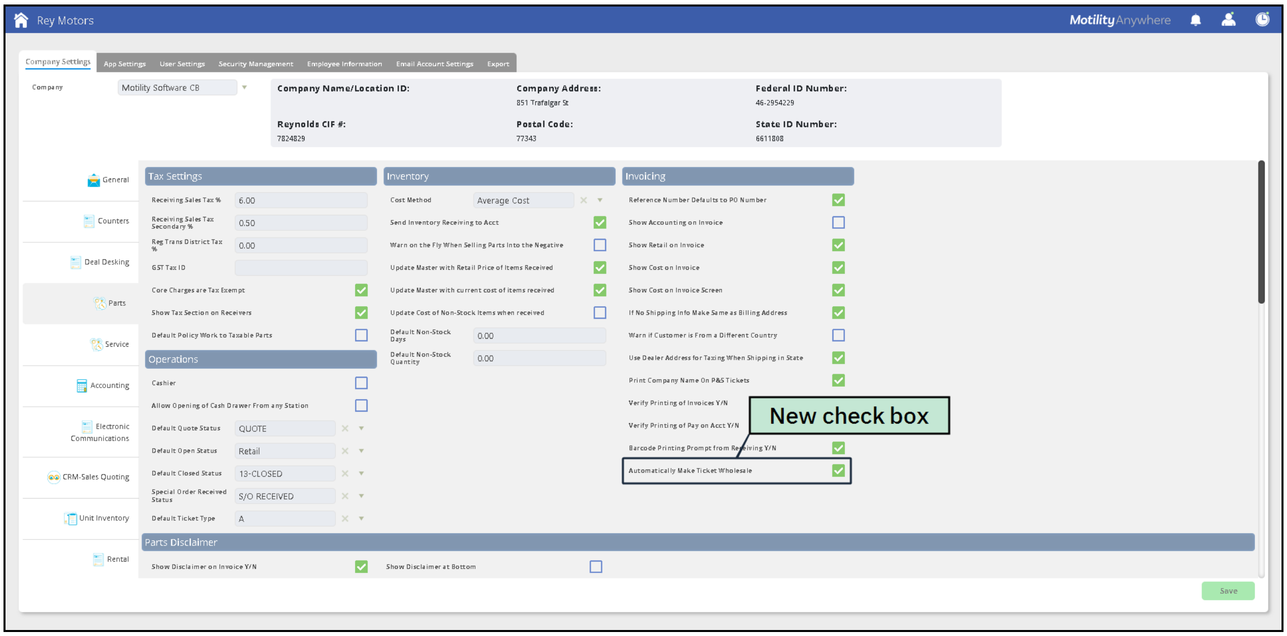


In addition, you can use the new **Last Job** button on the My Repairs screen to display the Job window or service invoice to which you last clocked in.



Add wholesale invoices more easily

Parts and service invoices added for wholesale customers can now be automatically added as wholesale invoices. Previously, when a wholesale customer was added to an invoice, a message window displayed, and the employee was required to manually confirm that the invoice should be converted to a wholesale invoice. Now, you can use a new setting to define the invoices to be automatically added as wholesale invoices, saving time.



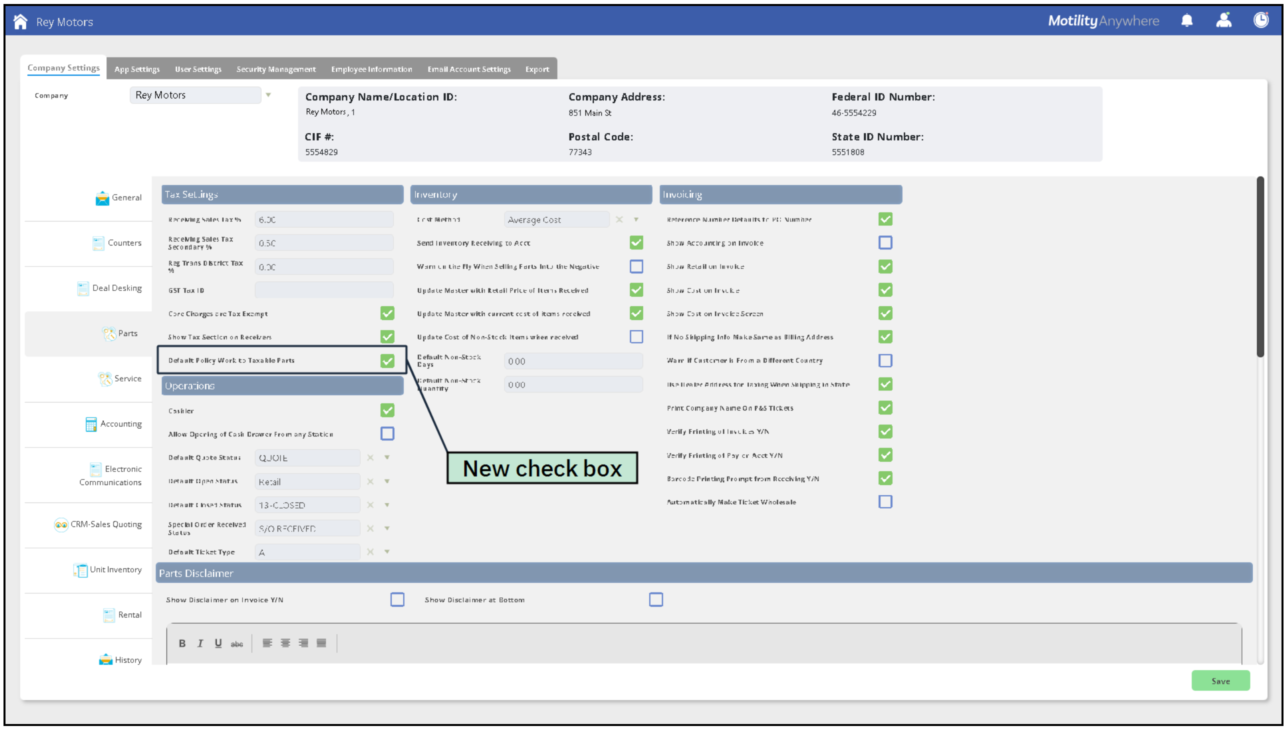
To define invoices for wholesale customers to be automatically added as wholesale invoices, access the Parts subtab on the Company Settings tab on the Settings screen. Then select the new **Automatically Make Ticket Wholesale** check box and click the **Save** button to save the changes.

When a wholesale customer is added to a parts invoice or a service invoice, a message displays, confirming that the invoice has been added as a wholesale invoice.

Note - Entities are defined as wholesale customers on the P&S Info tab on the Entity window in the CRM module.

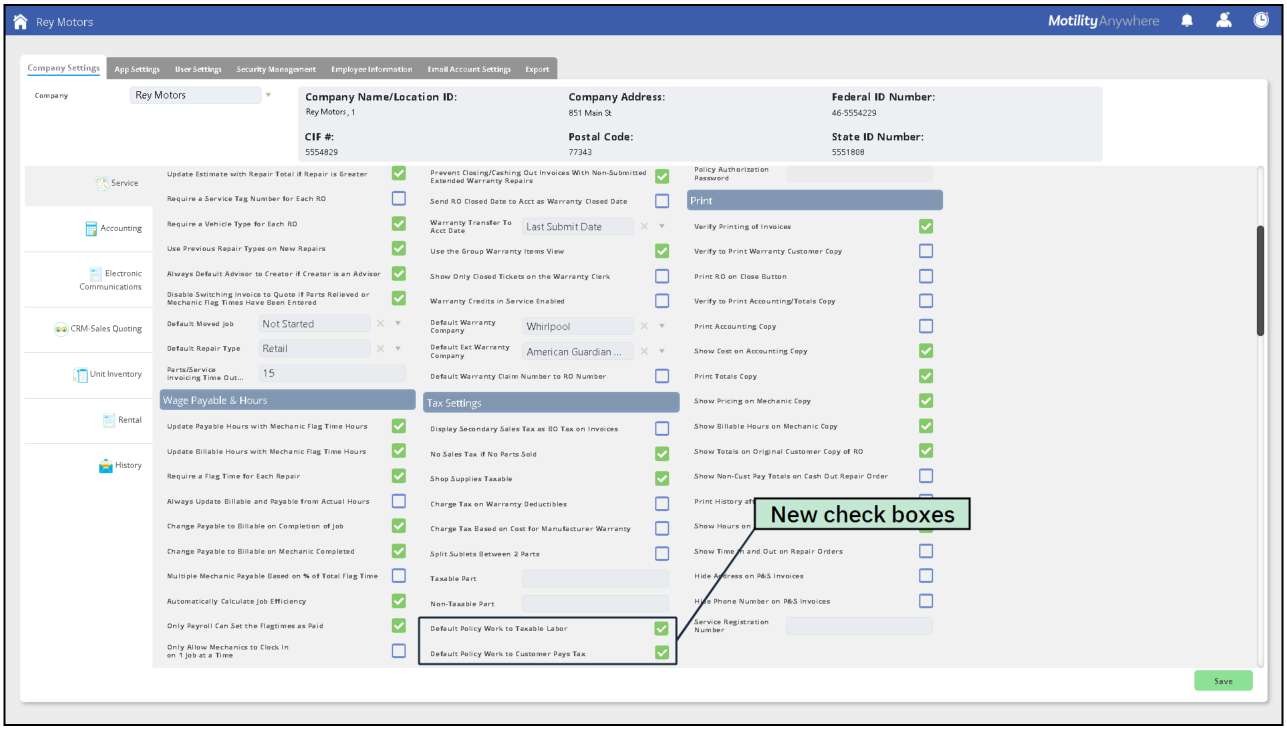
Define default tax options for policy repair lines

Managers now have increased flexibility to define default tax settings for parts and labor on policy repairs. Previously, users were required to manually select tax options when adding policy repair lines on an invoice. Now, you can define the tax options to be automatically selected when policy repair lines are added, helping to prevent occurrences when the incorrect tax options are selected in error.



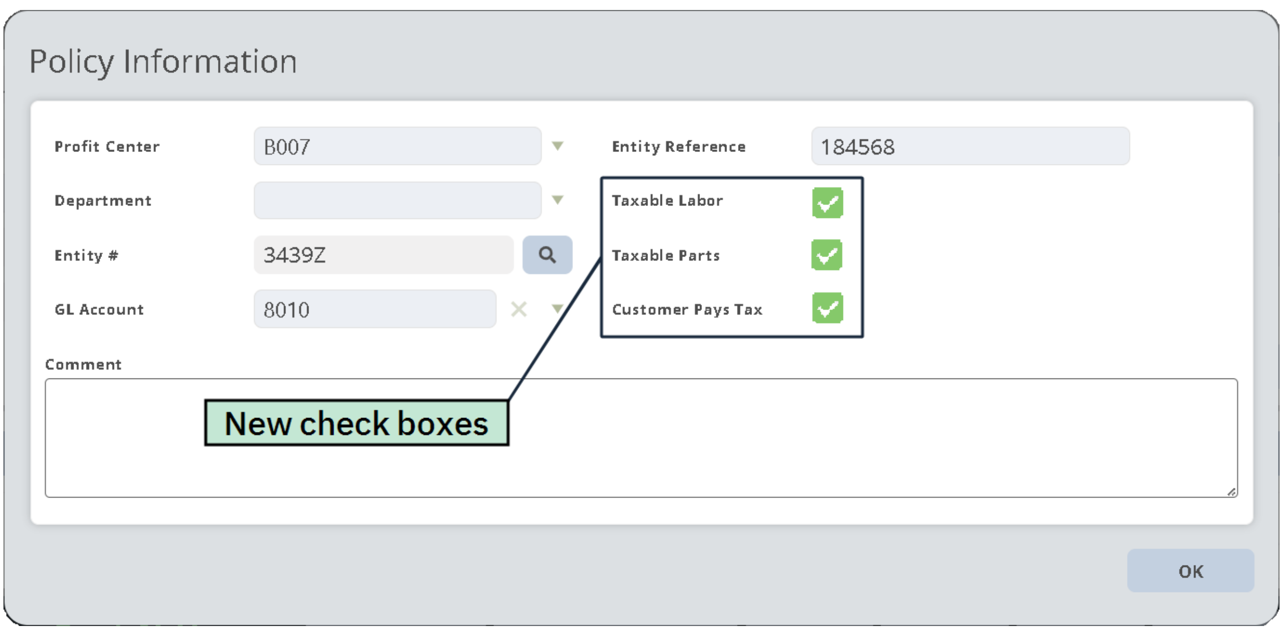
To define the default tax settings for policy repair parts, access the Parts subtab of the Company Settings tab on the Settings screen. Select the new **Default Policy Work to Taxable Parts** check box to define parts used for policy repair work as taxable. To save the settings, click the **Save** button, as normal.

*Note - The **Default Policy Work to Taxable Parts** check box is cleared by default.*

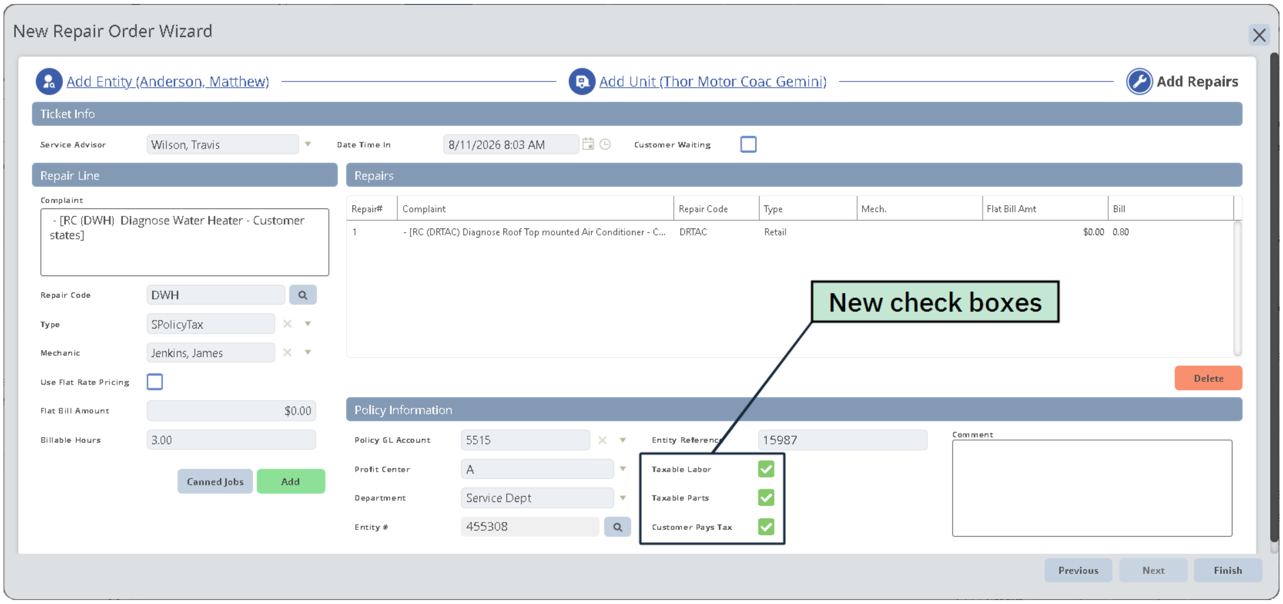


Similarly, to define the tax defaults for policy repair labor, access the Service subtab of the Company Settings tab on the Settings screen. Select the new **Default Policy Work to Taxable Labor** check box to define labor for policy repair work as taxable. Select the new **Default Policy Work to Customer Pays Tax** check box to indicate that the customer is responsible for paying the tax associated with the policy repair. Click the **Save** button to save the changes, as normal.

*Note - The **Default Policy Work to Taxable Labor** and **Default Policy Work to Customer Pays Tax** check boxes are cleared by default.*



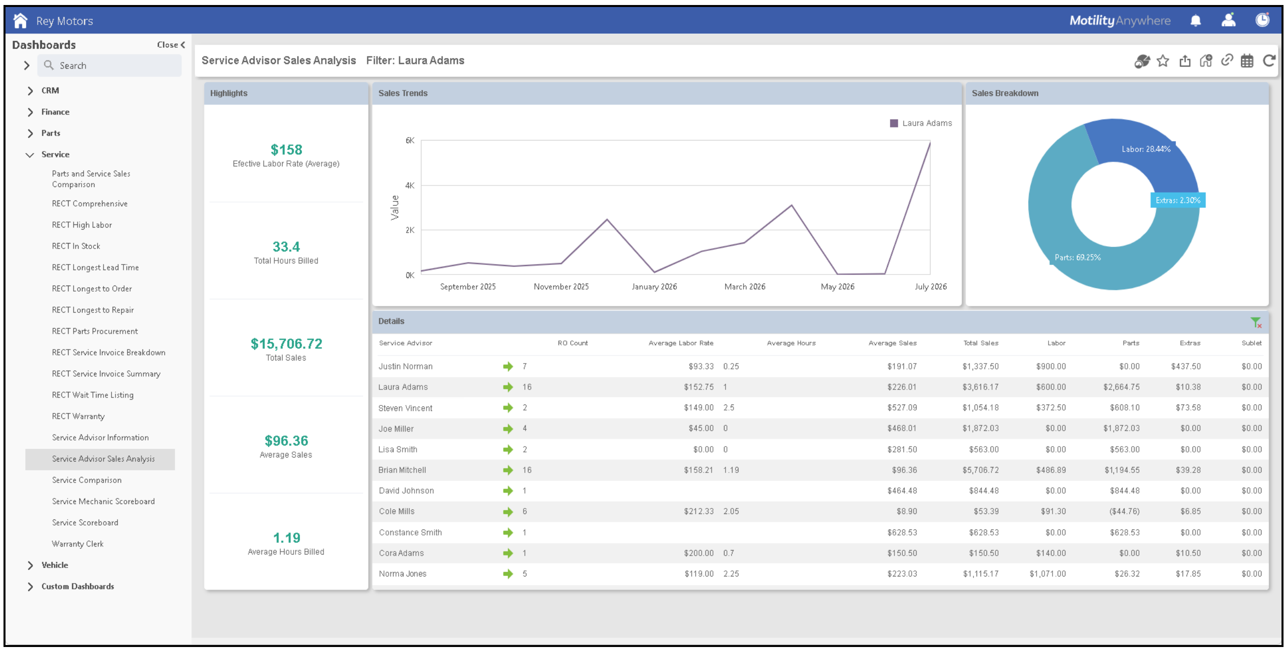
Once the default settings are defined, the corresponding check boxes are automatically selected or cleared on the Policy Information window when a new policy line is added on the Service Invoice window or on the New Repair Order Wizard window when creating a new repair order for policy work using the Service Invoice Wizard.



For more information about the Service Invoice Wizard on the New Repair Order Wizard window, refer to page 39.

Track and review service advisor sales performance using a new Dashboard view

Using the new Service Advisor Sales Analysis dashboard view in the Dashboard module, you can easily track and review sales performance for service advisors in a central location. This view includes a graph and a chart that can be used to determine sales trends and various sales type amounts for advisors as a percentage of total sales. Key sales metrics, such as effective labor rate, repair count, and average sales for multiple advisors, can also be compared using the view. If you need to review additional details for an advisor, you can drill down to individual invoices for the advisor directly from the view.



To access this view, click the *Service Advisor Sales Analysis* link in the Service section of the Dashboard menu.

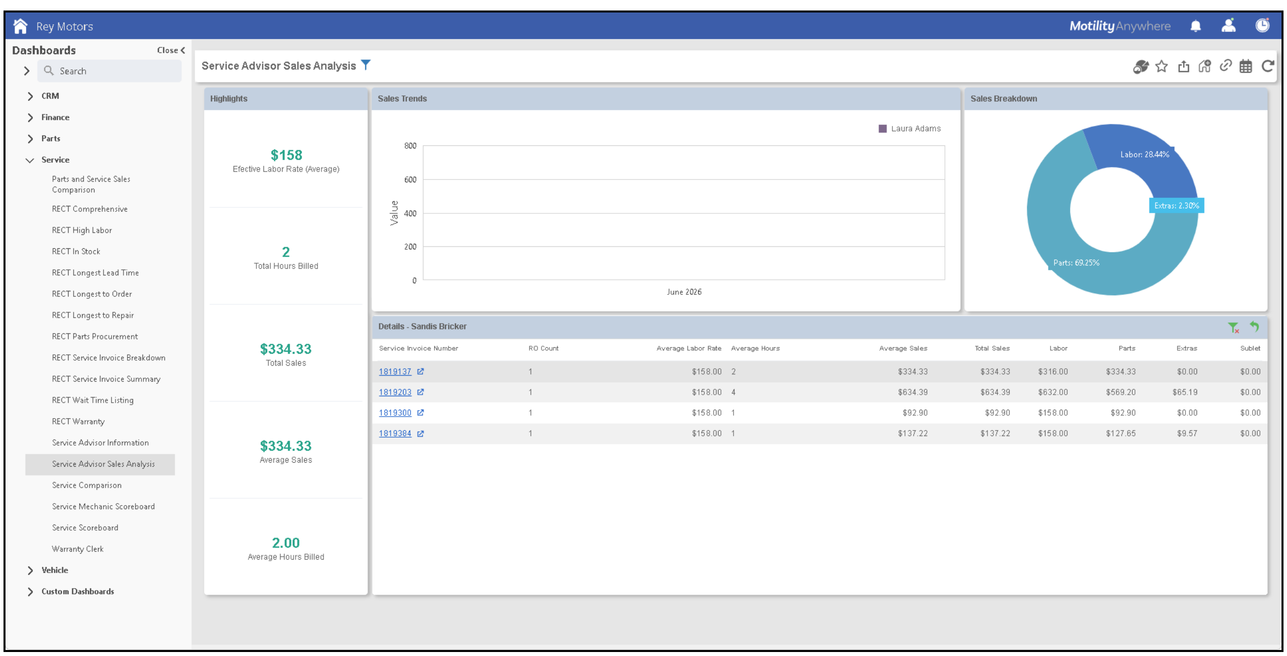
In the Sales Trends section, a line graph displays to illustrate the total sales for a selected advisor over a 12-month period. In addition, the average effective labor rate, total hours billed, total sales value, average sales value, and average hours billed for the advisor display in the Highlights section.

Additional sales information for each advisor included in the view displays in the Details section.

The following columns display in the Details section.

- **Service Advisor.** This column displays the name of the service advisor. Select a row to display the corresponding sales information for the advisor in the Sales Trends section, the Sales Breakdown section, and the Highlights section.
- **RO Count.** This column displays the number of repair orders for the advisor.
- **Average Labor Rate.** This column displays the average labor rate for the advisor.
- **Average Hours.** This column displays the average number of hours per invoice for the advisor.
- **Average Sales.** This column displays the average sales per invoice for the advisor.
- **Total Sales.** This column displays the total sales for the advisor.
- **Labor.** This column displays the total labor sales for the advisor.
- **Parts.** This column displays the total parts sales for the advisor.
- **Extras.** This column displays the total other sales for the advisor.
- **Sublet.** This column displays the total sublet sales for the advisor.

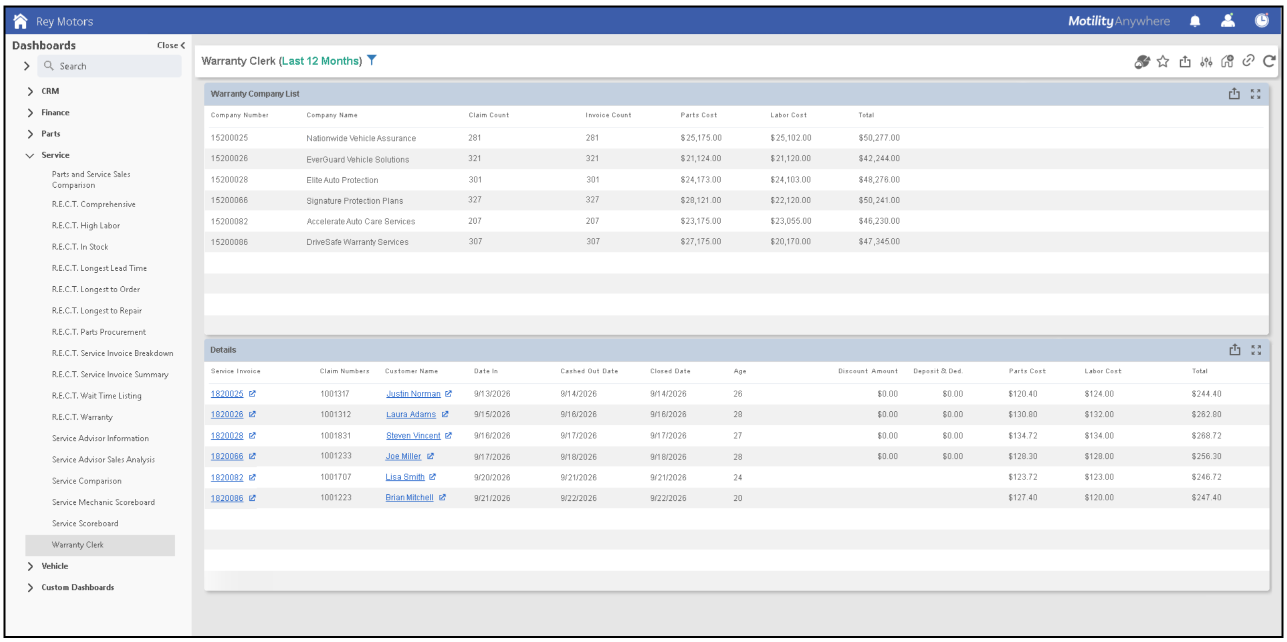
To view additional sales information for each invoice for an advisor, click the (Breakdown Arrow) icon in the **RO Count** column. The sales information by invoice displays in the Details section.



If additional details for a specific invoice are needed, click the link in the **Service 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.

Monitor warranty claims using a new Dashboard view

The new Warranty Clerk view is available in the Dashboard module to allow you to easily monitor warranty claim activity and related financial amounts in a central location. In this view, you can review total claim counts, total claim value, and so on, for various warranty companies as well as details for specific invoices associated with the warranty claims for each company. If you need to review additional details for a customer or an invoice included in the view, you can drill down to the corresponding entity or invoice record with a single click.



To access the Warranty Clerk view, click the *Warranty Clerk* link in the Service section of the Dashboard menu. The view automatically displays data for the previous 12 months 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 the Warranty Company List section, a table displays various count and dollar amount totals for each warranty company included in the view.

The following columns display in the Warranty Company List section.

- **Company Number.** This column displays the number for the warranty company.
- **Company Name.** This column displays the name of the warranty company.
- **Claim Count.** This column displays the total number of claims submitted to the warranty company.
- **Invoice Count.** This column displays the total number of invoices submitted to the warranty company.
- **Parts Cost.** This column displays the total cost of parts included on the invoices submitted to the warranty company.
- **Labor Cost.** This column displays the total cost of labor included on the invoices submitted to the warranty company.
- **Total.** This column displays the total of all parts costs and labor costs included on the invoices submitted to the warranty company.

Additional information for each invoice included in the view displays in the Details section. Select a warranty company record from the table in the Warranty Company List section to only display data for that warranty company in the Details section.

The following columns display in the Details section.

- **Service Invoice.** This column displays the number for the invoice as a link. Click the link for an invoice to display the Service Invoice window in the Parts & Service module on a new tab of the Internet browser, where detailed information for the invoice can be reviewed.
- **Claim Number.** This column displays the warranty claim number for the invoice.
- **Customer Name.** This column displays the customer name for the invoice as a link. Click the link for a customer to display the entity record for the customer on the Entity window in the CRM module on a new tab of the Internet browser.
- **Date In.** This column displays the date on which the customer's unit was brought in for service.
- **Cashed Out Date.** This column displays the date on which the invoice was cashed out.
- **Closed Date.** This column displays the date on which the invoice was closed.
- **Age.** This column displays the age of the invoice.
- **Discount Amount.** This column displays the discount amount applied to the invoice.

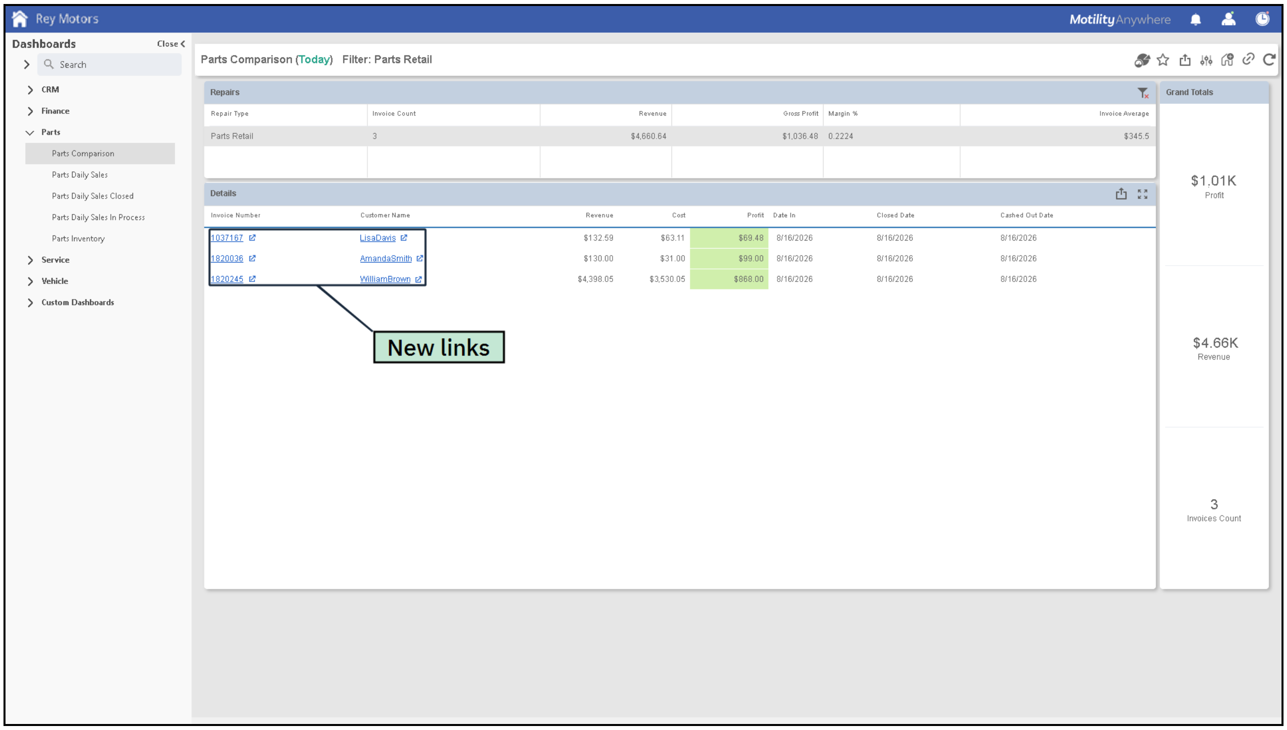
- **Deposits & Ded.** This column displays any deposits paid by the customer or deductions applied to the invoice.
- **Parts Price.** This column displays the price of the parts included on the invoice.
- **Labor Price.** This column displays the price of the labor included on the invoice.
- **Total.** This column displays the total price for parts and labor included on the invoice after any discounts or deductions.

Additional information

- Information displayed on the Warranty Clerk view is based on the information included in the Warranty Clerk report.

Access invoice and entity records from the Parts Comparison Dashboard view

Using new links on the Parts Comparison Dashboard view, you can now access invoice and entity records for parts sales directly from the view. In addition, the view has been reorganized to display in a more visually appealing layout, and columns have been renamed to more clearly indicate their purpose.



To review additional information for an invoice included in the view, 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 review additional information for an entity included in the view, simply click the link for the entity in the **Customer Name** column. The Entity window in the CRM module for the customer displays in a new tab of the Internet browser, where you can review the entity profile.

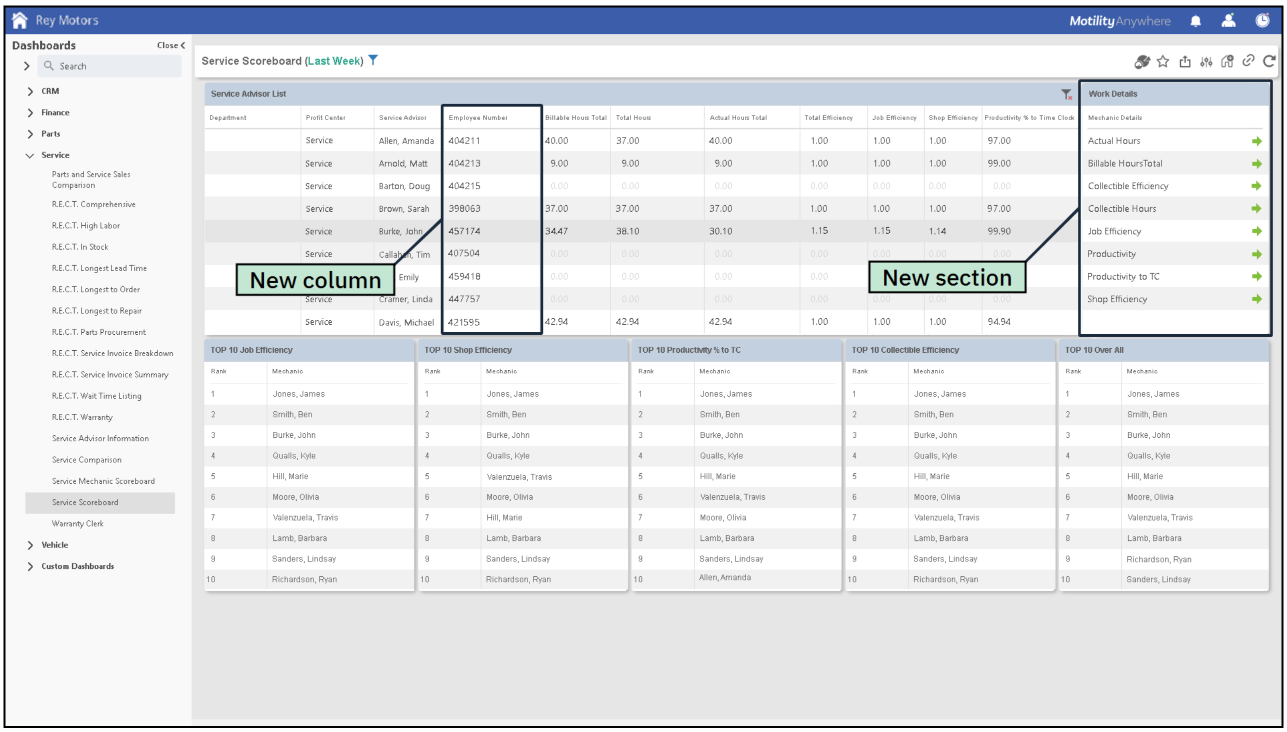
Additional information

- The **Invoice Count** column has been moved to the right of the **Repair Type** column.
- The **DateTimeIn** column has been renamed the **Date In** column.

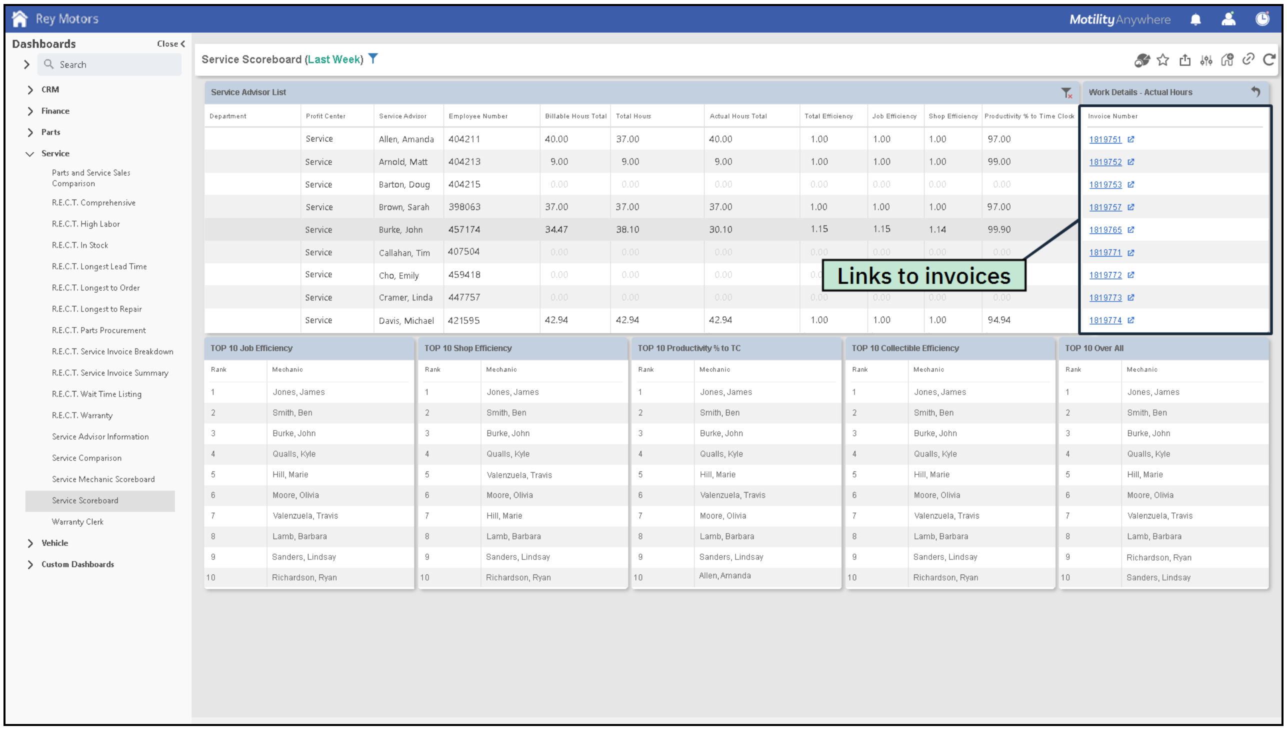
- The **ClosedDate** column has been renamed the **Closed Date** column.
- The **CashedoutDate** column has been renamed the **Cashed Out Date** column.

Updated Dashboard view for reviewing service advisor performance

The Service Scoreboard Dashboard view, previously the KPI Service Scoreboard Dashboard view, has been updated to help you review service advisor performance more effectively. Using the new Work Details section, you can easily identify and access invoices corresponding to various metrics for specific service advisors. In addition, a new column has been added to the view for you to review the employee numbers for service advisors in the view.



The new Work Details section can be used to review the specific invoices used to calculate a service advisor's performance metrics. For example, when you select a service advisor in the Service Advisor List section, a list of the performance metrics in the view that includes values for the service advisor displays in the Work Details section. Simply click a metric option in the Work Details section, such as the **Job Efficiency** option, to display a list of links to the invoices used to calculate the service advisor's job efficiency.



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.

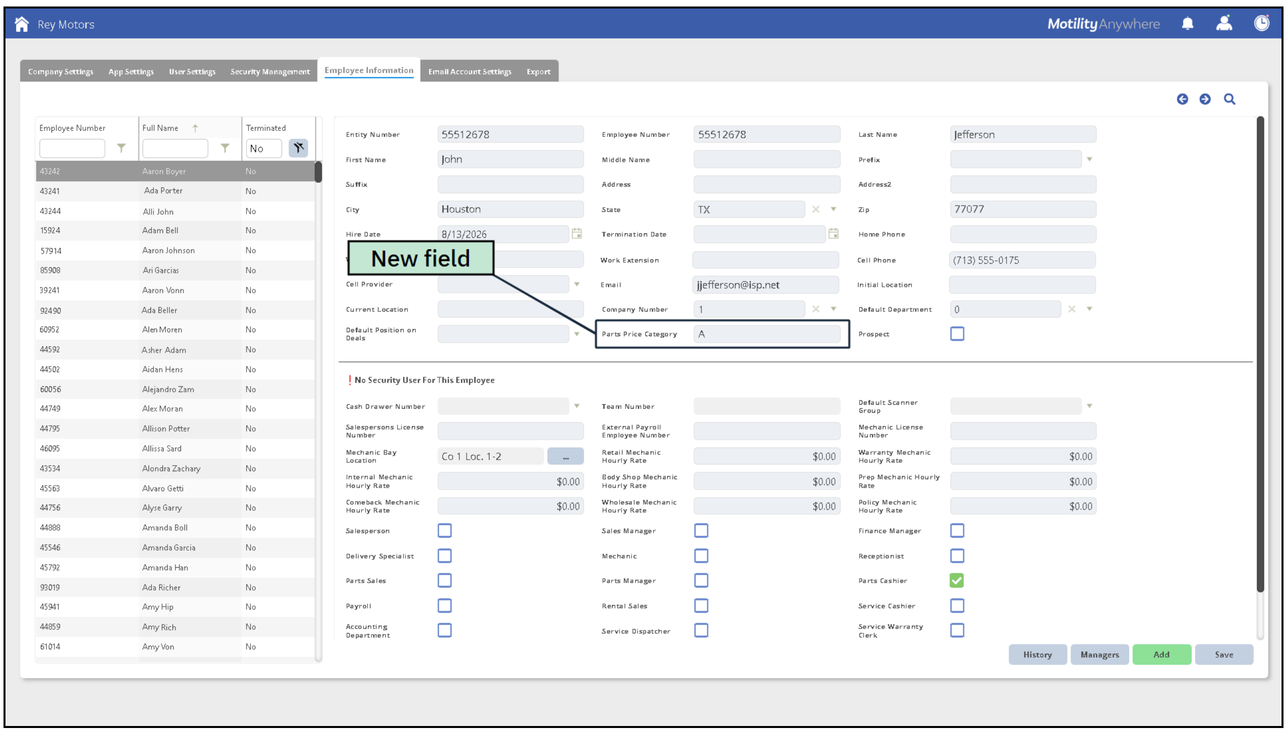
In addition, you can review employee numbers for service advisors using the new **Employee Number** column in the Service Advisor List section.

Additional information

- The **Collectible Hours** field has been renamed the **Total Hours** field, and the **Collectible Efficiency** field has been renamed the **Total Efficiency** field.

Assign parts price categories for employees more easily

You can now define a parts price category for an employee directly from the Employee Information tab on the Settings screen, which can be especially useful for defining discounts on parts to control pricing as the employee's status changes. Previously, parts price categories could only be modified for an employee on the Entity window in the CRM module. Now, you can use the new **Parts Price Category** field on the Employee Information tab on the Settings screen to update the setting.

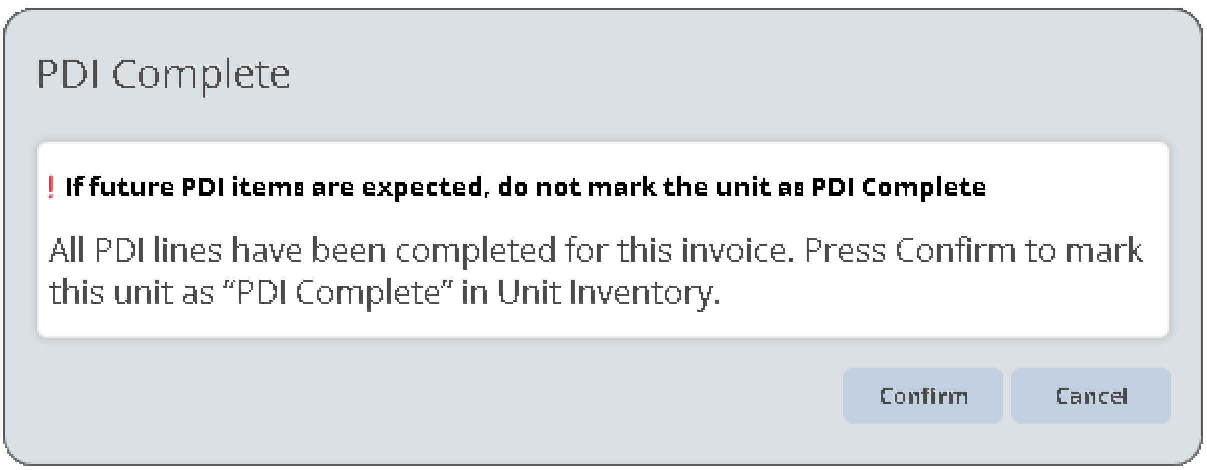


To assign a parts price category for an employee, simply enter the category in the **Parts Price Category** field for the employee on the Employee Information tab on the Settings screen. Then click the **Save** button to save the changes.

Automatically prompt technicians to confirm PDI completion

When cashing out a service invoice with pre-delivery inspection (PDI) lines for a unit, you can now confirm that the PDI is complete directly from the Parts & Service module. Previously, you were required to access the Unit window for the unit in the Unit Inventory module to manually mark the PDI as complete. Now, when the last PDI job is completed for a unit, you are prompted to confirm that no additional PDI work is needed, which automatically updates the PDI as completed in the Unit Inventory module.

When an employee clicks the **Cash Out** button or the **Close** button on the Service Invoice window, the new PDI Complete window displays if the invoice includes a PDI repair.



Click the **Confirm** button to confirm that no more PDI work is needed and return to the Service Invoice window. When this button is clicked, the **PDI Complete** check box on the Unit window for the unit in the Unit Inventory module is automatically selected.

Alternatively, click the **Cancel** button to return to the Service Invoice window and not update the PDI as completed in the Unit Inventory module.

Miscellaneous Parts & Service enhancements

- 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.
- At dealerships where the **Don't Cash Out Service Internals** check box is selected on the Service subtab on the Company Settings tab on the Settings screen, internal invoices are now automatically updated to Closed - Cashed Out status and posted to accounting when the **Close** button on the Service Invoice window is clicked.
- When the GL Detail Report (Research) report is exported as a .csv file, an .xls file, or an .xlsx file, blank rows and columns on the report are removed from the exported data.

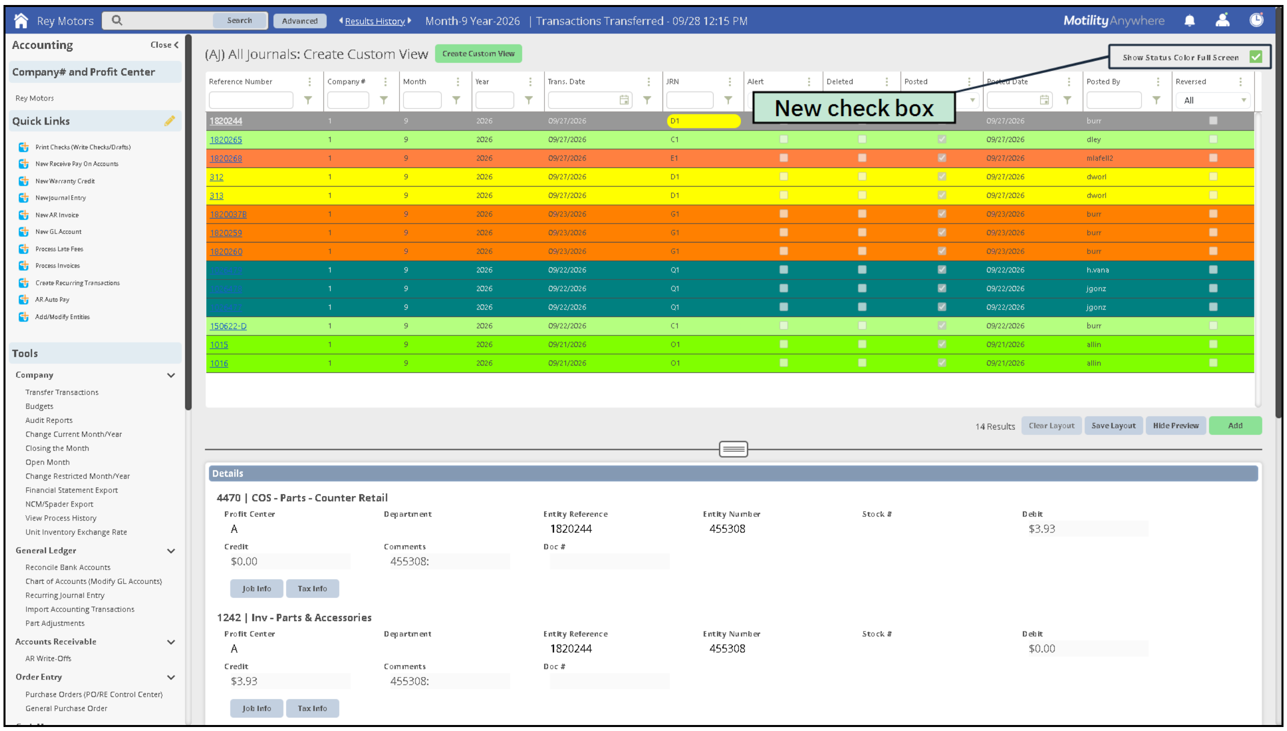
Business Office Enhancements

Accounting

Display journal colors across journal transaction rows

On screens used to review journal transactions, journal colors can now be displayed across the entire transaction row, allowing you to more easily identify transactions by their color.

The screens that were updated with this enhancement are accessed using the following path: Accounting module → Views → Journals.



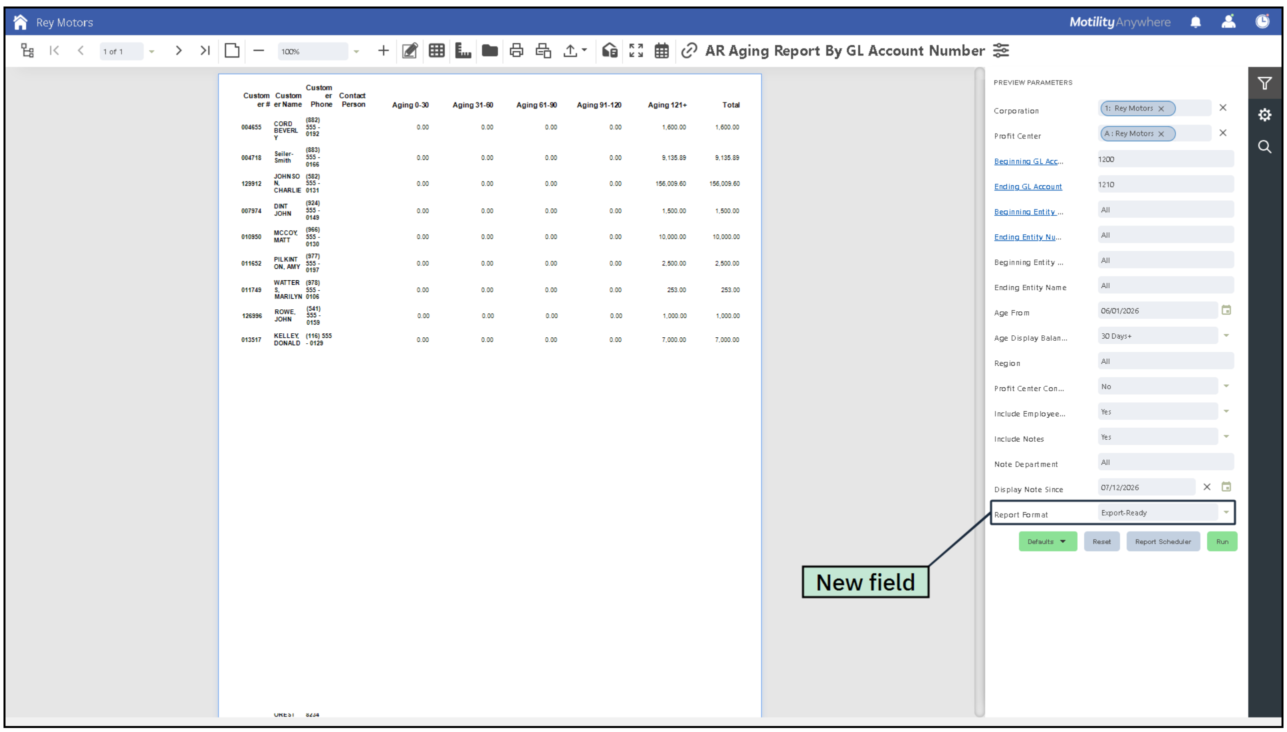
To display journal colors across the full transaction row rather than only the **JRN** column, simply select the new **Show Status Color Full Screen** check box. In addition, when you drill down to review individual entries for a transaction by clicking a link in the **Reference Number** column, the name of the window used to review the entries displays the journal color.

Note - Journal colors are defined on the App Settings tab on the Settings screen, as normal.

New report format for exporting AR Aging report data

You can now request AR Aging reports in a new export-ready format that allows you to export and customize the report data more easily. When you request the following reports in this new format and then export the data as an .xls file or .xlsx file, the report data displays in separate columns and cells, which is especially useful when organizing information in the spreadsheet.

- AR Aging Report - By GL Account Number
- AR Aging Report - By Entity Number
- AR Aging Report - By Entity Name
- AR Aging Report - By Transaction

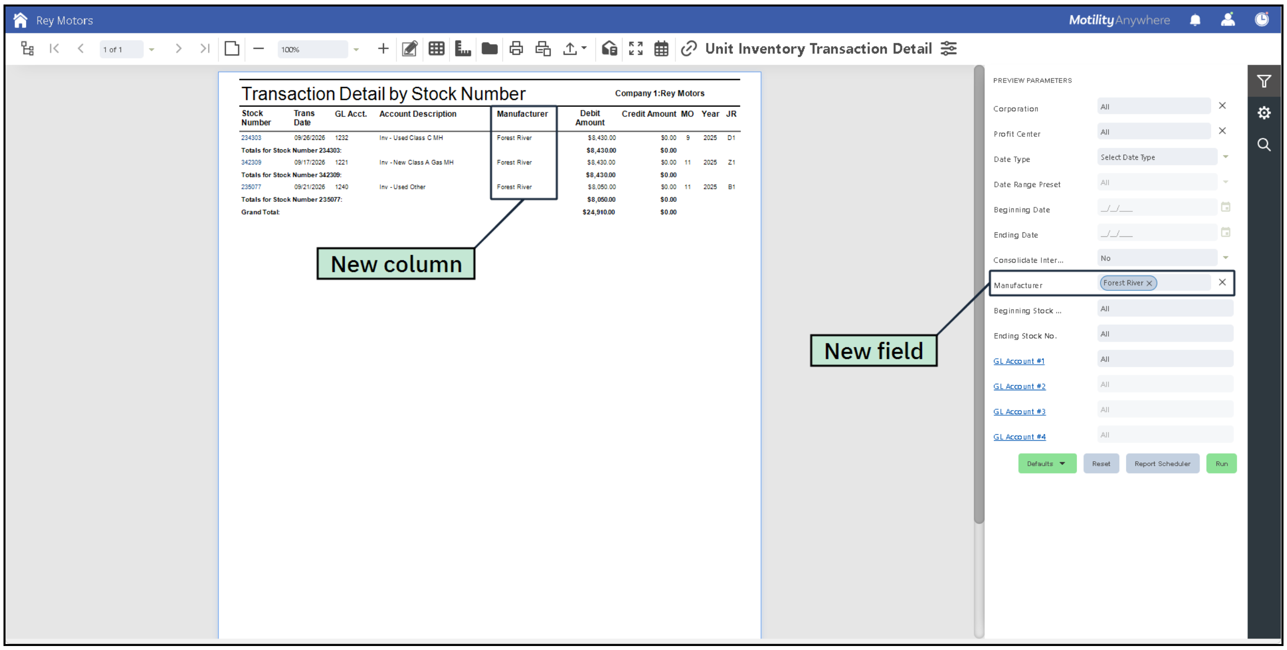


To request the report in the export-ready format, simply select the **Export-Ready** option in the new **Report Format** field in the Preview Parameters section.

*Note - AR Aging reports can still be requested in the standard format using the **Standard** option in the **Report Format** field.*

Limit Unit Inventory Transaction Detail report data by manufacturer

You can now limit the Unit Inventory Transaction Detail report to only include transactions for specific manufacturers. In addition, a new column has been added to the report for you to easily determine the manufacturer for each transaction included on the report.



To include specific manufacturers on the report, select each manufacturer to include in the new **Manufacturer** field in the Preview Parameters section. Alternatively, to include information for all manufacturers on the report, leave this field blank.

Once all criteria is defined, click the **Run** button to request the report, as normal. The manufacturer for each transaction displays in the new **Manufacturer** column on the report.

Review invoice numbers for warranty repair accounting entries

For accounting transactions created for warranty repair work, the warranty claim number is now used as the entity reference number for warranty accounts receivable (WR) account entries. For all other service work, the service invoice number is still used as the entity reference number.

Miscellaneous Accounting 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.