MotilityAnywhere

Release Notes

Enhancements to MotilityAnywhere

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Motility Software Solutions

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General Program Enhancements

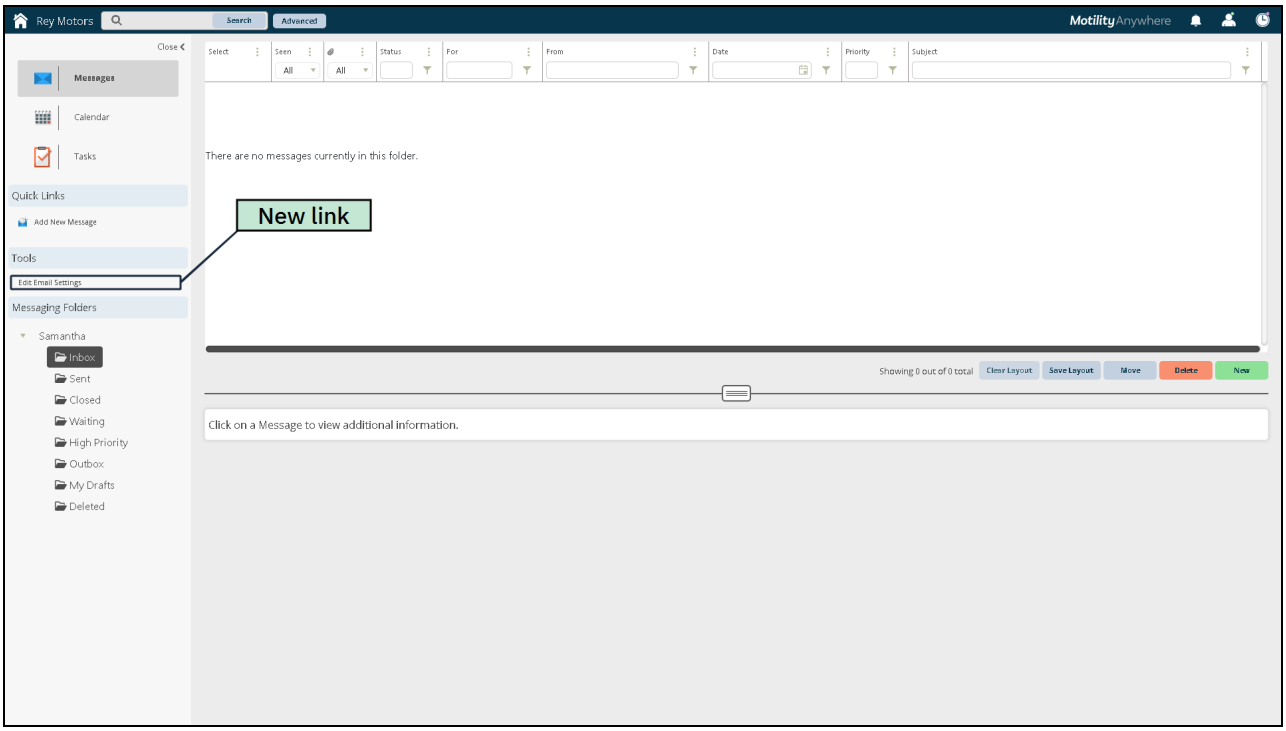
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Messaging

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Quickly access Email settings

Using a new link in the Tools section in the Messaging module, you can quickly access your CRM Email message settings. Simply click the *Edit Email Settings* link to access the CRM-Sales Quoting subtab in the User Settings tab on the Settings screen, where you can review and update your Email message settings, including signature settings, message templates, and preset replies.



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Reports

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New report available

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

Parts and Service

- Purchase Order Receiving History report. For more information, refer to page 44.

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Report enhancement

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

Unit Inventory

- Unit Inventory Manager report. For more information, refer to page 33.

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Dashboard

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New Dashboard view available

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

Parts & Service

- Parts Aging Inventory. For more information, refer to page 46.

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Dashboard enhancements

Enhancements have been made to the following Dashboard views in the Dashboard module. 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 21.
- Finance Deposits. For more information, refer to page 22.

Unit Inventory

- Inventory Aging Breakdown. For more information, refer to page 31.

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Security Management

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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 → **Restrict From Changing a Deal Status to Cancelled**. For more information, refer to page 24.
- Finance → **Restrict Users from Modifying Base Selling Price Fields**. For more information, refer to page 25.

Unit Inventory

- Vehicle Inv → **[FIELD LEVEL] Model-Required**. For more information, refer to page 36.
- Vehicle Inv → **[FIELD LEVEL] Status-Required**. For more information, refer to page 36.
- Vehicle Inv → **[FIELD LEVEL] VIN-Required**. For more information, refer to page 36.
- Vehicle Inv → **[FIELD LEVEL] Year-Required**. For more information, refer topage 36.

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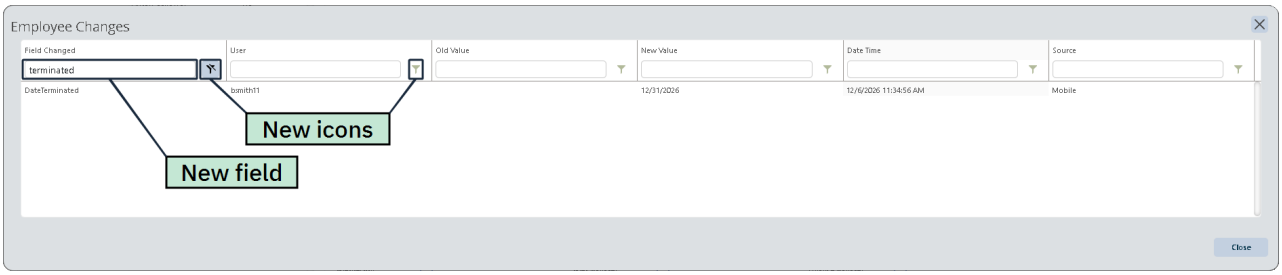
General System

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Filter employee history

When reviewing updates to an employee record on the Employee Changes window, you can now filter the information that displays, which is especially helpful if you need to identify details for specific updates to the employee's settings.

For example, suppose you want to reference the user who updated the termination date for an employee and the date on which the update was made. You can now filter the information in the **Field Changed** column using the term "terminated" to quickly display details for when the termination date for the employee was updated.



To filter history information for an employee, simply enter criteria by which to filter the data in the new unlabeled **Search** field in a column header on the Employee Changes window. Then click the new (Filter) icon and select a filter option to display entries matching the criteria. To clear the search filter, click the new (Clear) icon.

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Front-End Enhancements

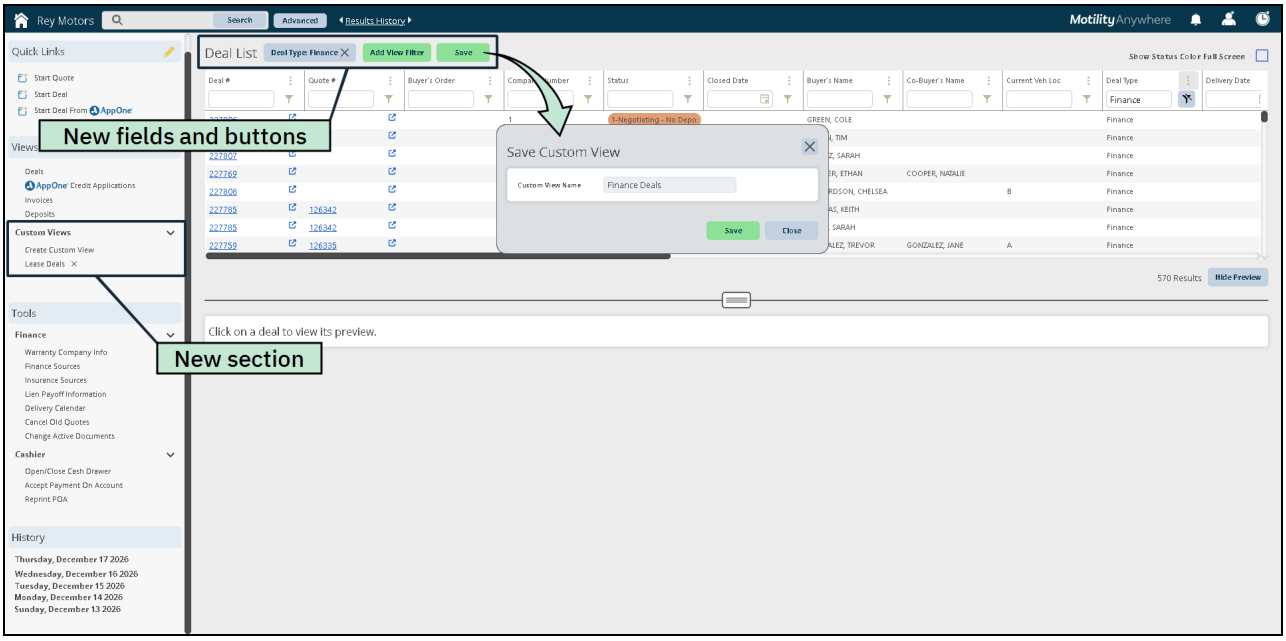
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Deal Desking

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Create custom views of deals

Custom views are now available on the Deal List screen in the Deal Desking module, allowing you to quickly perform commonly requested searches for the deals you want to review without manually entering search criteria.



To create a custom view, simply click the *Create Custom View* link in the new Deal Desking → View → Custom Views section and click the **Create Custom View** button. A list of filters displays. Select the filter to include, such as the deal type or deal status, and enter the term to filter. To add an additional filter for the view, click the **Add View Filter** button.

To save the custom view, click the new **Save** button. The Save Custom View window displays, where you can enter a name for the view. Then click the **Save** button to save the view. Once saved, you can access the view by clicking the corresponding link in the Deal Desking → View → Custom Views section.

Additional information

- To delete a custom view, simply click the ✕ (Click to delete) icon next to the name of the custom view in the Deal Desking → Views → Custom Views section.

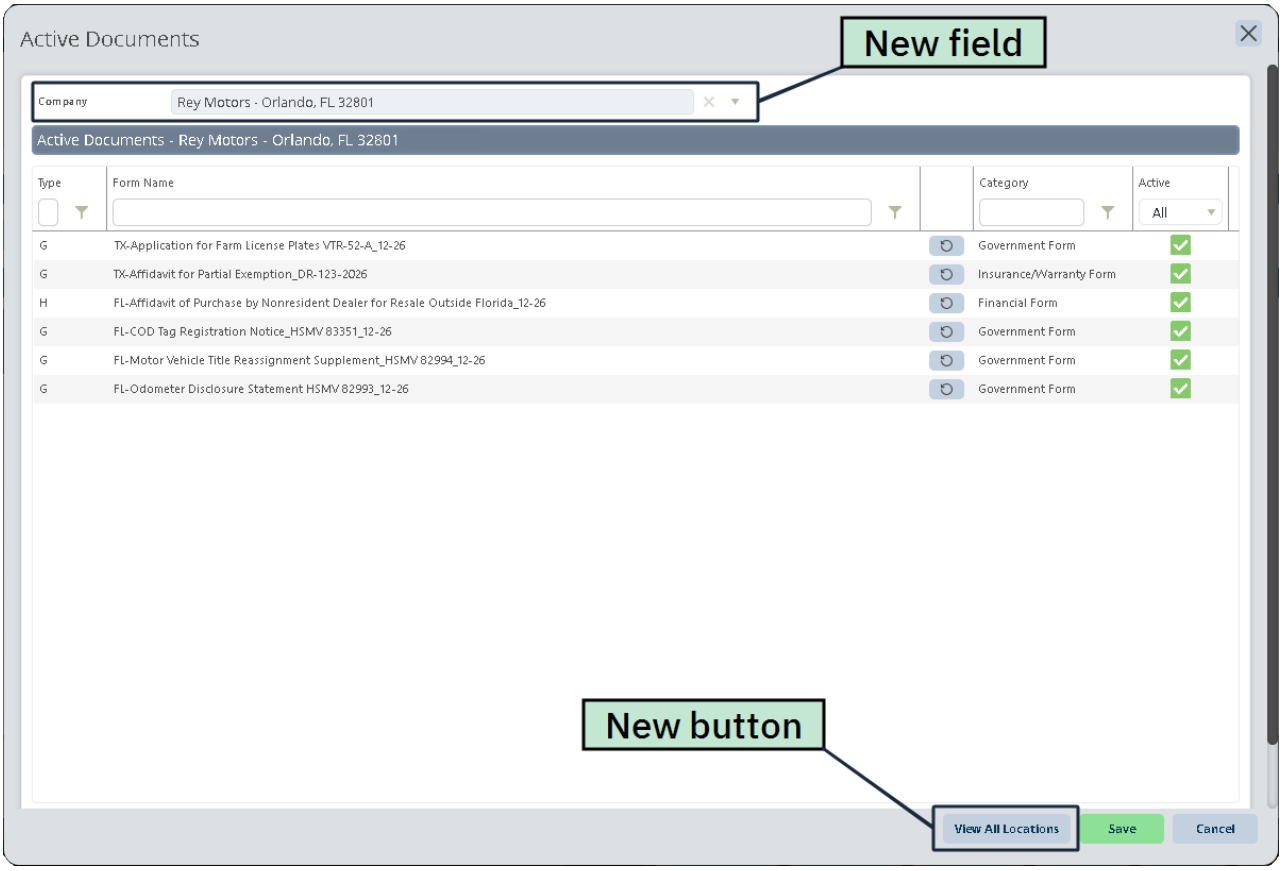
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Manage active forms more easily

You can now easily define forms to be available for specific dealership locations in the Deal Desking module. Using this enhancement can be especially useful for maintaining concise forms lists for each dealership location in a group since forms used at the various locations commonly differ. In addition, if a form name was updated, but you need to revert back to the previous form name, you can now update the form name with a single click.

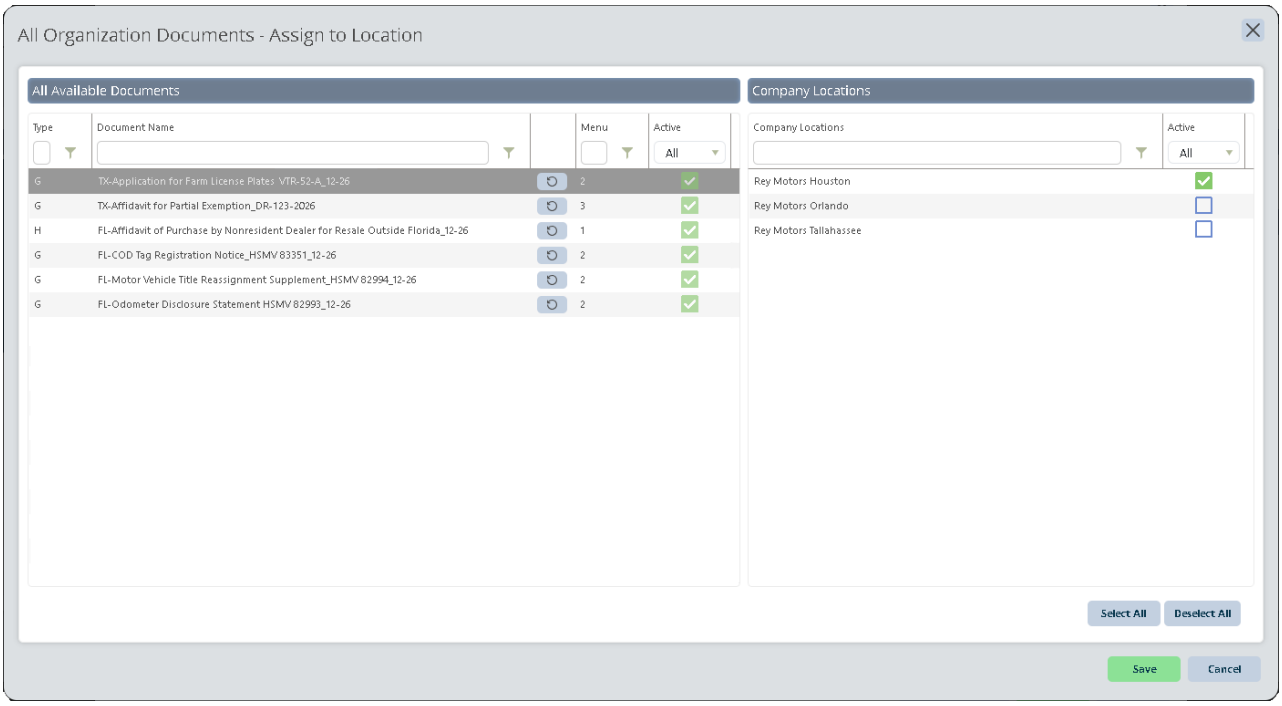
Defining forms availability by location

The Active Documents window, previously the Documents window, can be used to define the forms available for a specific dealership location. To define forms for a location, select the location in the new **Company** field. Then select the check boxes for the forms to make available in the **Active** column and click the **Save** button to save the changes.



Alternatively, you can define a specific form to be available at multiple locations using the new All Organization Documents window. To access this window, click the new **View All Locations** button on the Active Documents window.

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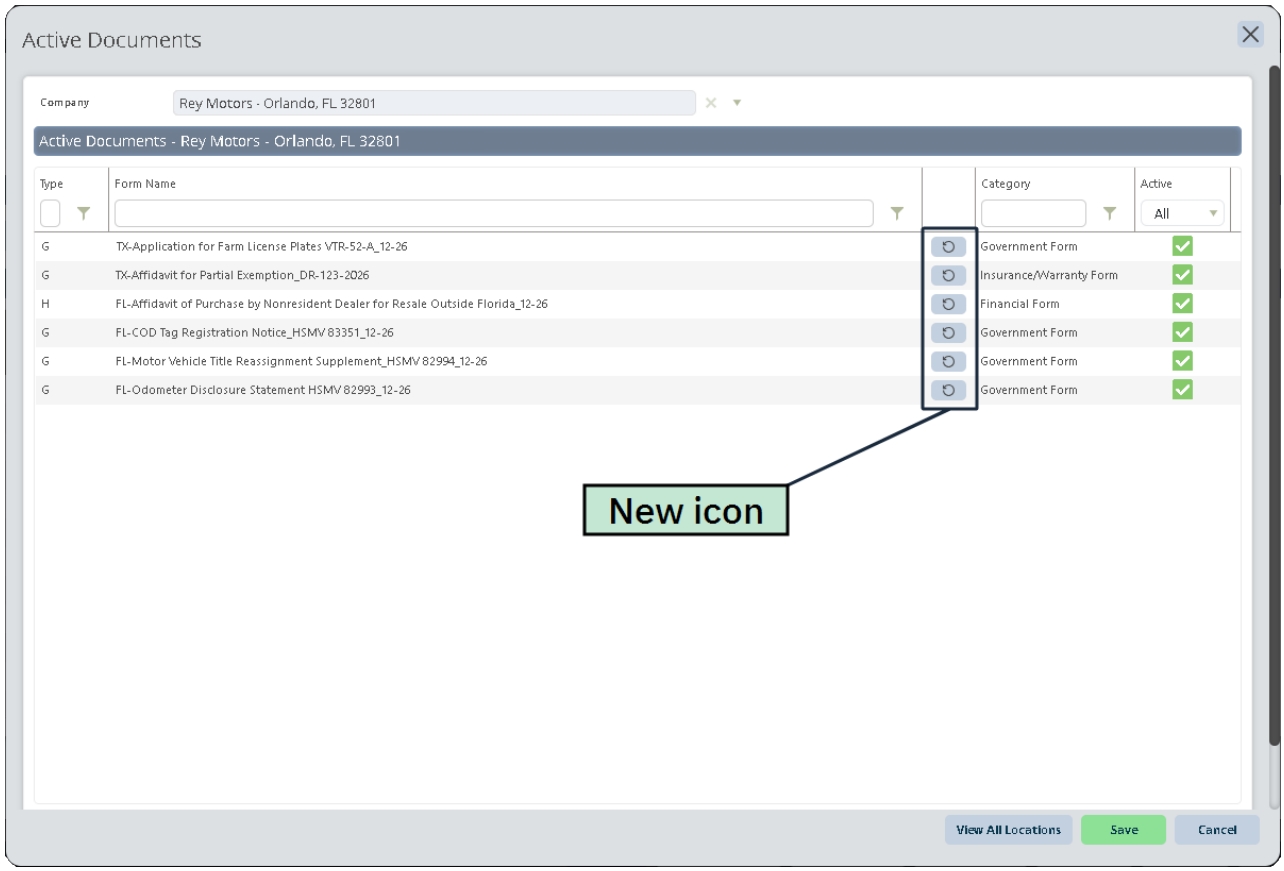


Highlight a row corresponding to a form in the All Available Documents section. In the Company Locations section, select the check box for each location where the form should be available and click the **Save** button to save the changes.

Easily modify the names of forms

When the entry in the **Form Name** field on the Active Documents window has been modified, you can now revert the entry to the default form name even after changes have been saved. Simply click the new (Reset Document Name) icon to revert the name of the document back to the default form name.

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Note - The default name for a form is defined in the Form Batch Setup section on the Deal Desking subtab on the App Settings tab on the Settings screen.

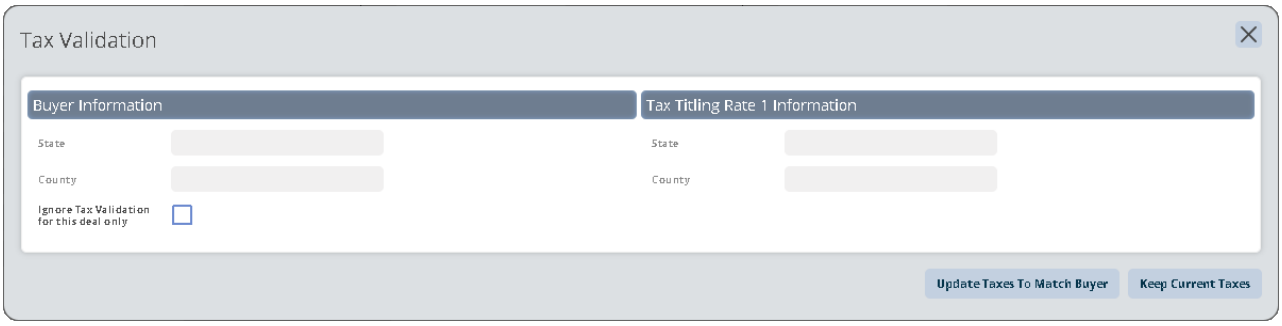
Additional information

- The **Company** field and the **View All Locations** button only display on the Active Documents window for dealerships with multiple locations.
- When the Active Documents window is closed and changes have not been saved, a message window now displays, indicating changes have not been saved. Click the **Cancel** button to return to the Active Documents window and then click the **Save** button to save the changes, as normal.

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Validate taxes when changing deal statuses

You can now be alerted to potential tax issues when a deal is updated to an internal status of Open in the Deal Desking module. When tax validation is enabled, the redesigned Tax Validation window, previously the Update Deal Status window, displays when you update a deal to a status with an internal status of Open, in addition to an internal status of Done, and the buyer's address does not match the Tax Titling Rate 1 information on the Taxes tab.



On the Tax Validation window, click the **Update Taxes to Match Buyer** button to update the Tax Titling Rate 1 state, city, and county to match the buyer's physical address. Alternatively, click the **Keep Current Taxes** button to retain the existing tax information. Select the **Ignore Tax Validation for this deal only** check box to prevent the Tax Validation window from displaying again for the deal.

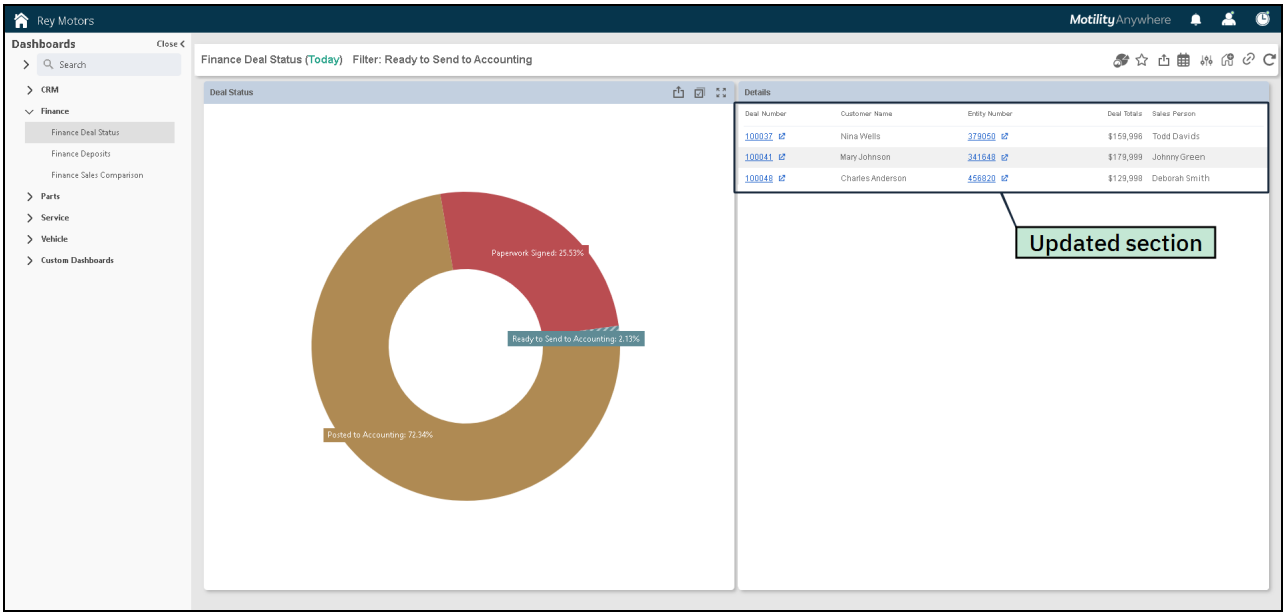
Additional information

- The Deal Information section on the Tax Validation window has been renamed the Tax Titling Rate 1 Information section.
- The **Change Titling Rate 1 to Match Buyer Information** option button on the Tax Validation window has been replaced with the **Update Taxes to Match Buyer** button.
- The **Leave the Deal Information** option button on the Tax Validation window has been replaced with the **Keep Current Taxes** button.
- The **Do not show tax validations for this deal** check box on the Tax Validation window has been renamed to the **Ignore Tax Validation for this deal only** check box.
- The **Pop the Tax Validation Screen** permission has been renamed the **Validate Taxes on Deal Status Change** permission.

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Updated Dashboard view for reviewing deal statuses

Using new links on the Finance Deal Status Dashboard view in the Dashboard module, you can quickly access the entity records for the customers associated with deals included the view. In addition, organizational changes have been made so that the view displays in a more intuitive layout.



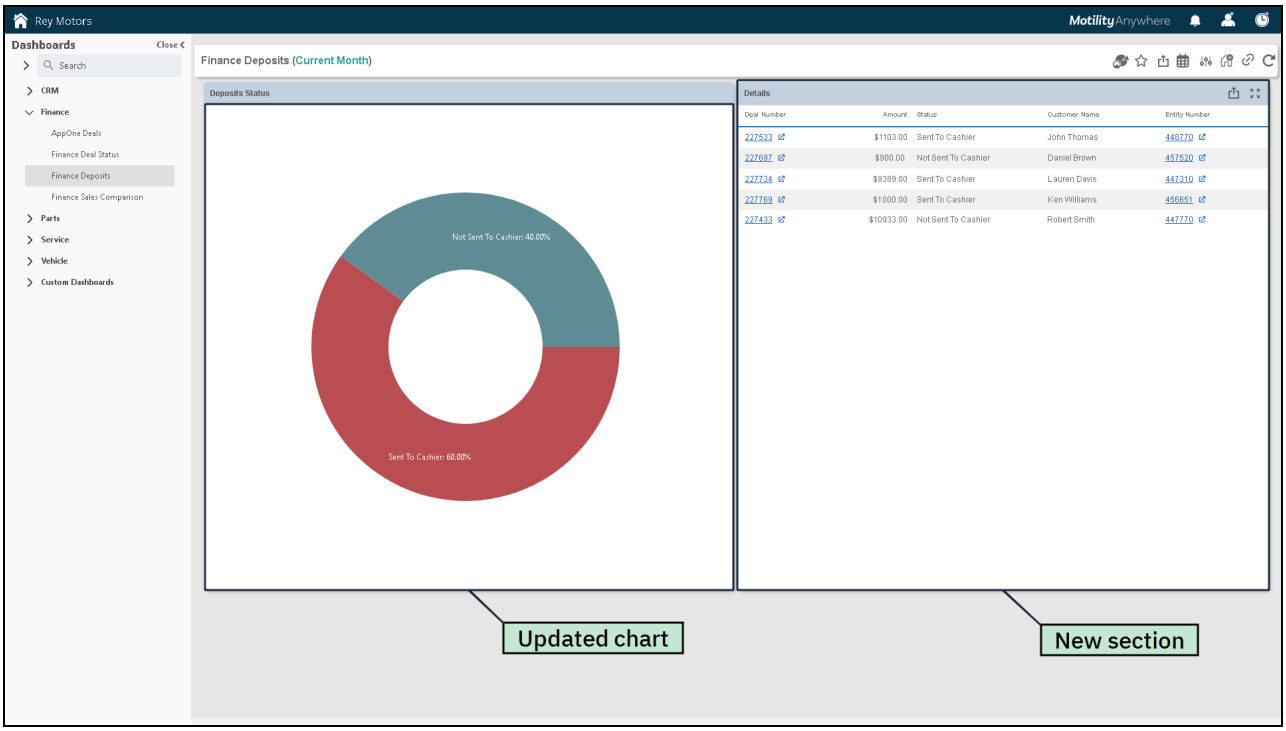
The following enhancements are available for the Finance Deal Status Dashboard view.

- The name of the customer associated with the deal now displays in the **Customer Name** column, and the entity number for the customer displays as a link in the **Entity Number** column. To view the customer's entity record, simply click the corresponding link in the **Entity Number** column. The entity record displays on the Entity window in the CRM module in a new tab of the Internet browser.
- The deal number now displays as a link in the **Deal Number** column. Previously, a link to the deal displayed in the **View Deal** column, which has been removed. To view the deal, simply click the corresponding link in the **Deal Number** column. The deal displays on the Deal window in the Deal Desking module in a new tab of the Internet browser, as normal.

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Updated Dashboard view for reviewing finance deposits

The Finance Deposits Dashboard view in the Dashboard module has been enhanced to allow you to monitor finance deposits more effectively. A new section is available for you to review details, such as the customer name and deposit amount, for the individual deposits included in the view. New links are also available for you to access deals and entity records directly from the view if you need to review more details related to a deposit. In addition, the chart used to review the status of deposits has been redesigned to display in a more visually appealing format.



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

- **Deal Number**: This column displays the service invoice number as a link. Click the link for a deal number to display the deal on the Deal window in a new tab of the Internet browser.
- **Amount**: This column displays the deposit amount for the deal.
- **Status**: This column displays the status of the deal.
- **Customer Name**: This column displays the name of the customer for the deal.

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- **Entity Number**: This column displays the entity number for the deal as a link. Click the link for an entity number to display the entity profile on the Entity window in a new tab of the Internet browser.

Click an area of the chart corresponding to a deposit status to only display information for deposits in that status in the Details section.

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Restrict employees from canceling finance deals

Administrators can use a new security permission in Security Management to restrict employees from changing a deal status to Cancelled. With this new security item, you have increased flexibility to define whether specific employees can modify the entry in the **Status** field on the Deal window in the Deal Desking module, helping you verify that a deal status is updated only by authorized personnel.

When the new security permission is selected for an employee and the employee attempts to cancel a deal, a new message window displays to indicate that the employee does not have permission to cancel the deal.

Note - For more information on restricting employees from changing a deal status to Cancelled, refer to page 11.

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Restrict employees from modifying base selling prices

Administrators can use a new security permission in Security Management to restrict employees from modifying the base selling price for a unit on a deal. With this new security item, you have increased flexibility to define whether specific employees can modify the entry in the **Base Selling Price** field on the Quote tab, the Lease tab, the Units tab, and the B Order tab on the Deal window in the Deal Desking module, helping you verify that the base selling price for a unit is updated by only authorized personnel.

Note - For more information on the new security permission for restricting employees from modifying base selling prices for a unit on a deal, refer to page 11.

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Updates to form batches

References to the buyers order print list have been updated to form batches on the Print Forms window and on the Deal Desking subtab on the App Settings tab on the Settings screen. Previously, form batches were referred to as buyers order print lists.

In addition, when printing forms for a deal, the form batches available on the Print Forms window now display based on the dealership location defined for the deal on the Deal window. Previously, the form batches displayed based on the location of the user accessing the deal.

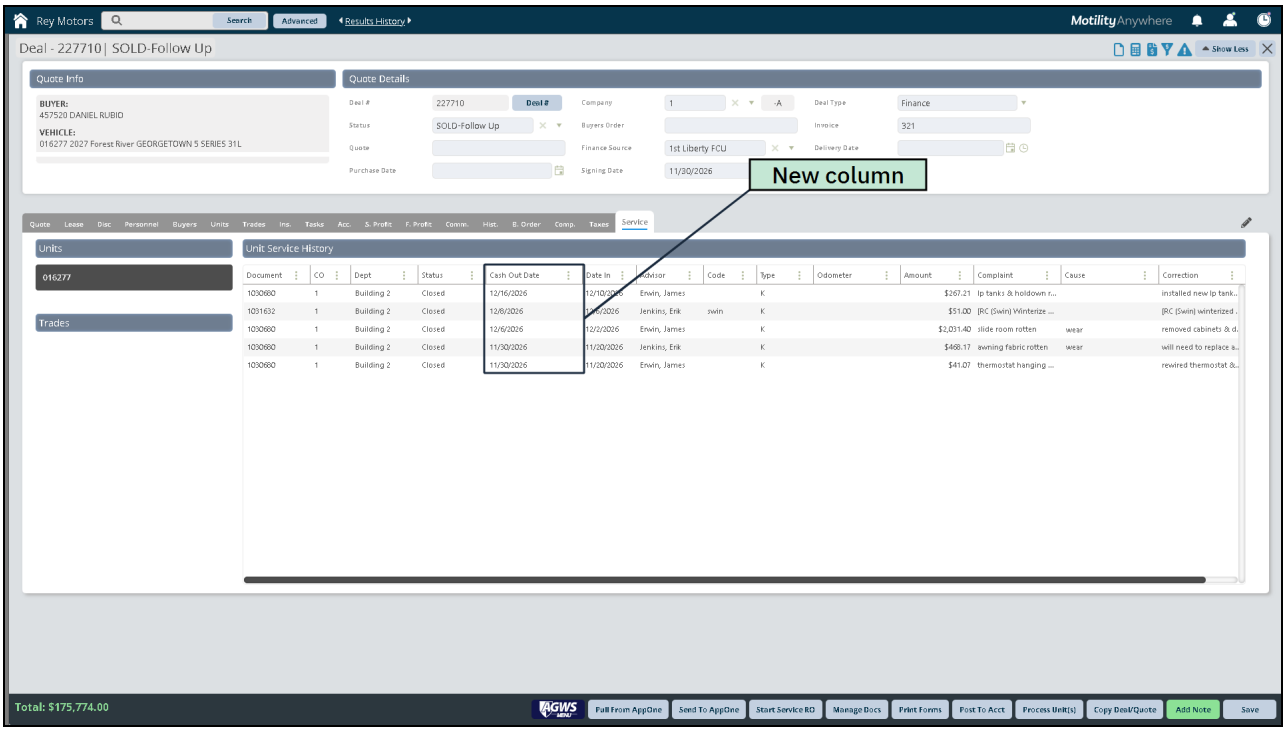
To add a form batch to the Selected Forms section on the Print Forms window, simply click the button in the Form Batches section corresponding to the form batch, as normal.

Note - The form batches that display for the dealership location are defined in the Form Batch Setup section on the Deal Desking subtab on the App Settings tab on the Settings screen.

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Review cash-out information for repair orders

When reviewing service information for a unit on the Service tab on the Deal window in the Deal Desking module, you can now quickly determine whether a repair order has been cashed out. The date on which the repair order was cashed out displays in the new **Cash Out Date** column, reducing the need to open the individual repair order to verify whether the repair order has been cashed out.



Additional information

- The **Date** column has been renamed the **Date In** column.

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Miscellaneous Deal Desking enhancement

- Previously unlabeled sections on the Quote tab, the Lease tab, and the B Order tab on the Deal window in the Deal Desking module now display with section headers to more clearly indicate the purpose of the sections.

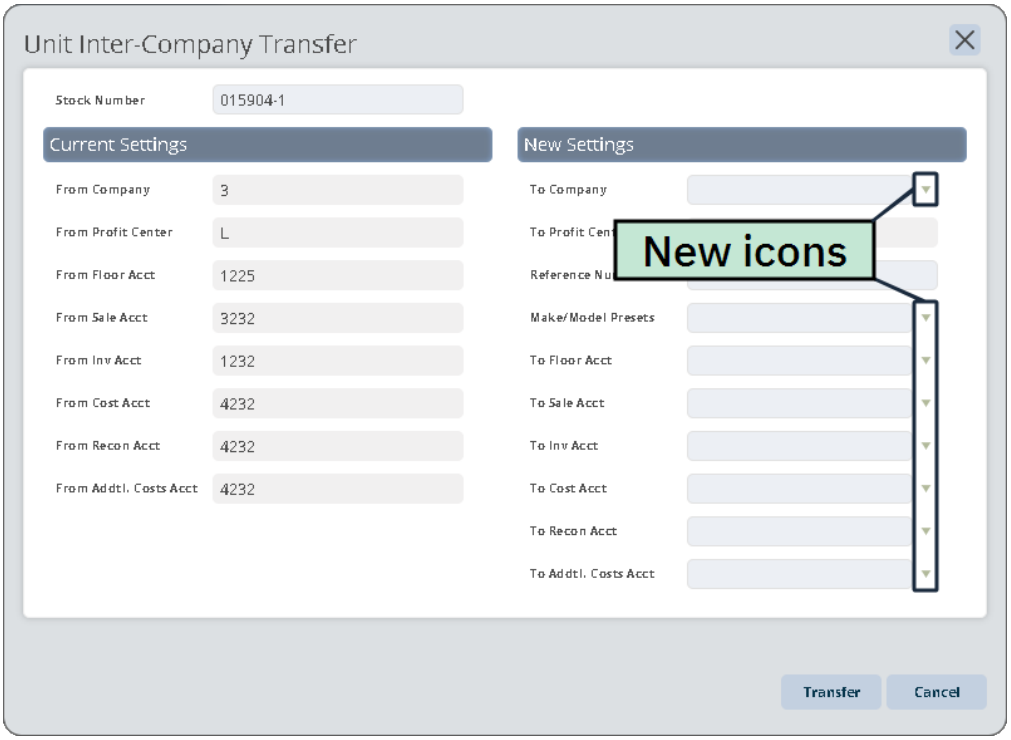
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Unit Inventory

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Updated window for transferring units between companies

The Unit Inter-Company Transfer window in the Unit Inventory module has been updated to more clearly indicate when an entry for a field can be selected using a pick list. In addition, this window has been redesigned to display in a more visually appealing layout.



When a pick list exists for a field, the ▾ (Down Arrow) icon now always displays. Simply click the ▾ (Down Arrow) icon for a field to display the pick list of valid entries, as normal.

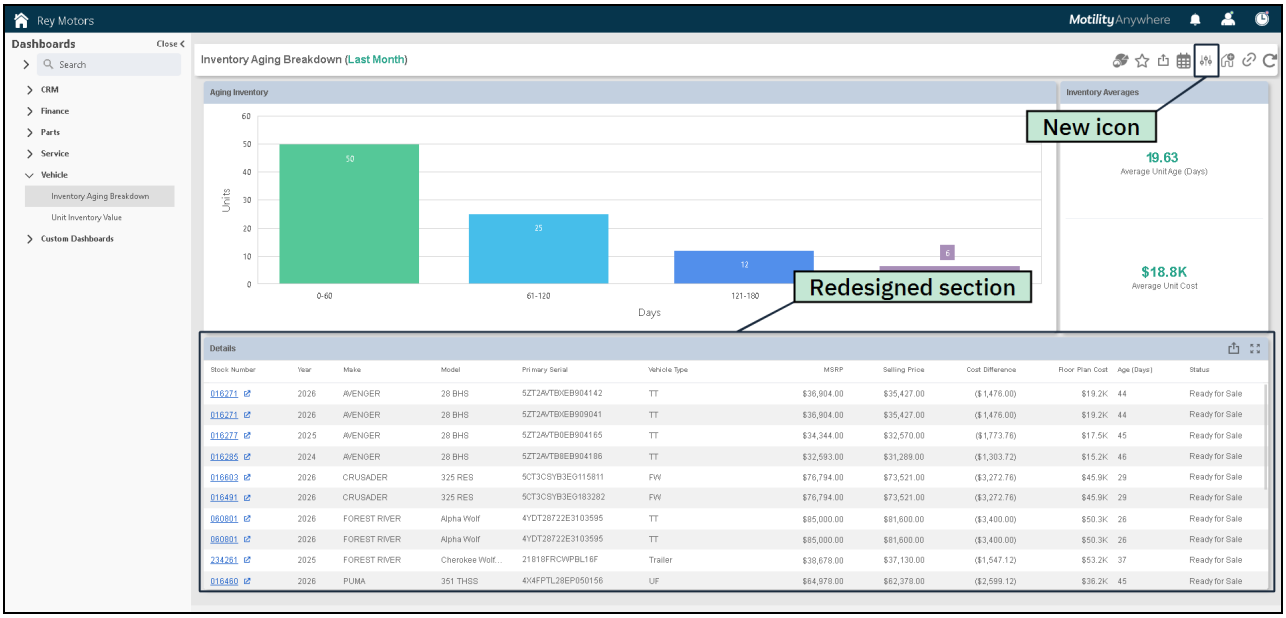
Additional information

- The **Unit Description** field on the Unit Inter-Company Transfer window has been removed.

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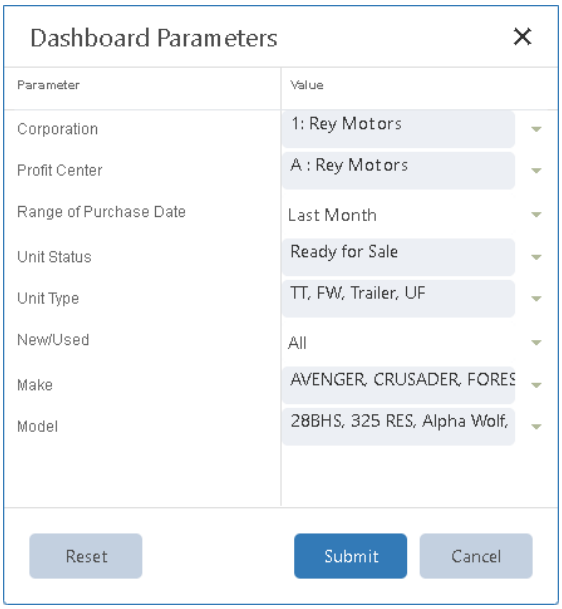
New parameters for the Inventory Aging Breakdown Dashboard view

You now have increased flexibility to filter the units included in the Inventory Aging Breakdown Dashboard view using new parameters in the Dashboard module. For example, you can now define the view to include units based on profit center, purchase date, unit status, unit type, make, and so on.



To define parameters for the Inventory Aging Breakdown Dashboard view, click the new (Dashboard Parameters) icon. The Dashboard Parameters window displays, where multiple parameters for the view can be defined.

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Simply define parameters for the view in the fields on this window and click the **Submit** button to save the changes.

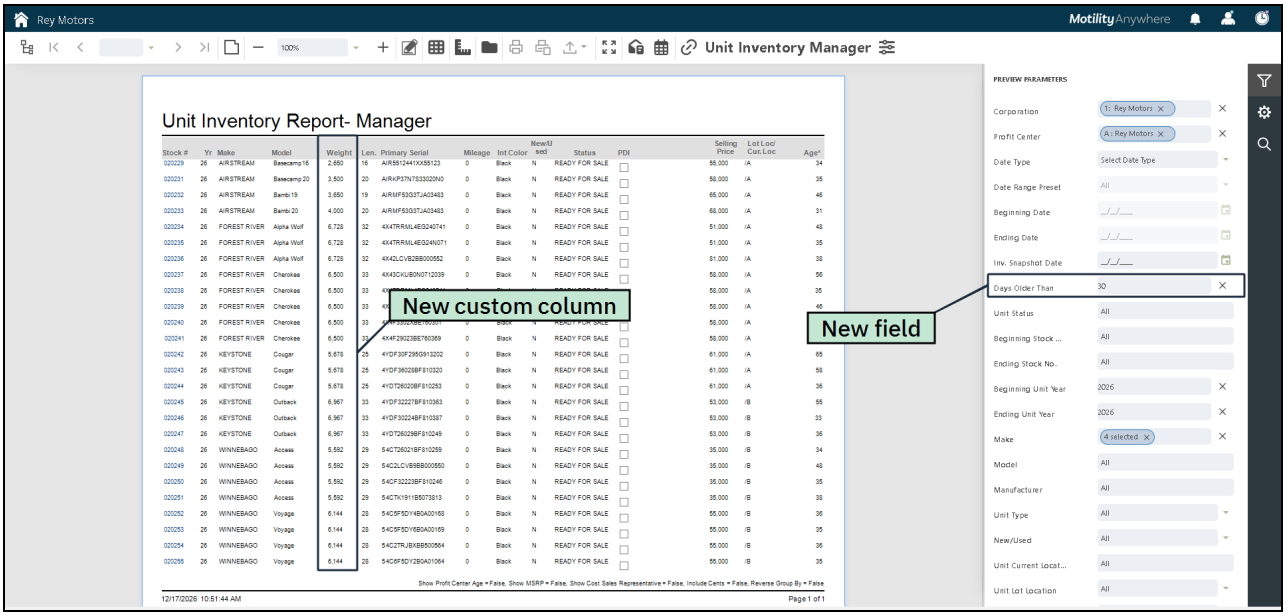
Additional information

- Lines in the Details section now display in an alternating gray and white color pattern.

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Multiple enhancements for the Unit Inventory Manager report

Multiple enhancements are available for the Unit Inventory Manager report in the Reports module. You can now filter the report to only include units that have been in stock for more than a specified number of days. In addition, you now have increased flexibility to customize the report to display the weight of each unit.



Filter report data by days in stock

To filter units on the report by the number of days in stock, enter the minimum age of units to include in the new **Days Older Than** field in the Preview Parameters section. Alternatively, to include information for units of all ages on the report, leave this field blank.

Once all criteria is defined, click the **Run** button to request the report, as normal. Only those units meeting or exceeding the minimum age entered in the **Days Older Than** field display on the report.

Include unit weight on the report

To display unit weight information on the Unit Inventory Manager report, click the ✎ (Edit report) icon on the Unit Inventory Manager report screen. The Report Designer screen displays, where settings for the report can be customized, as normal.

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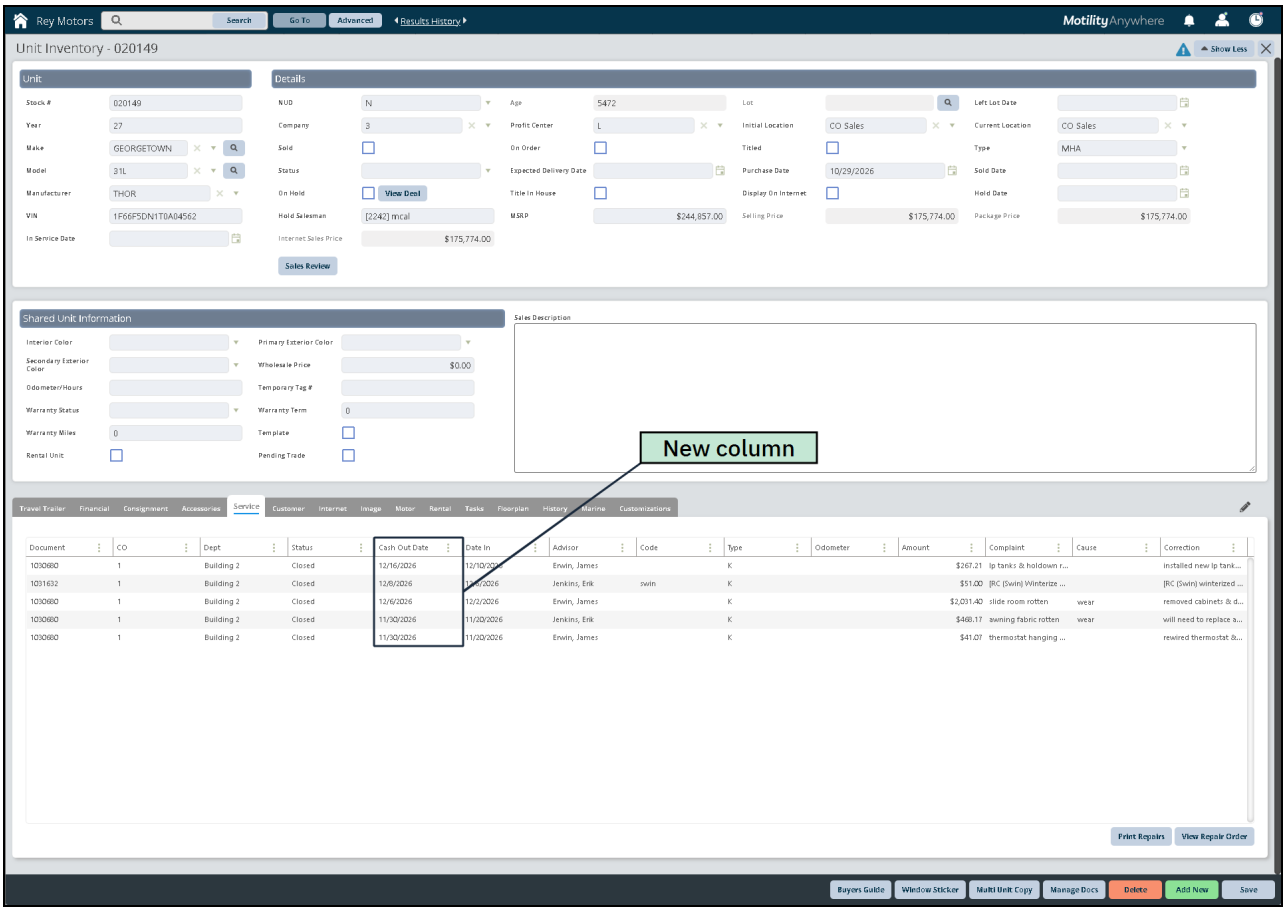
Click the (Function) icon on any column on the Report Designer screen to display the Expression Editor window, where the selected column can be customized to display unit weight information using the new **[UnitWeight]** function. Save the customized Unit Inventory Manager report and request the report, as normal. The new **Weight** column displays the unit weight on the report.

*Note - The **Weight** column displays the weight entered for a unit in the **Weight** field on the Travel Trailer tab on the Unit Inventory window.*

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Review cash-out information for repair orders

When reviewing service information for a unit on the Service tab on the Unit Inventory window in the Unit Inventory module, you can now quickly determine whether a repair order has been cashed out. The date on which the repair order was cashed out displays in the new **Cash Out Date** column, reducing the need to open the individual repair order to verify whether the repair order has been cashed out.



Additional information

- The **Date** column has been renamed the **Date In** column.

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Require various additional unit information

Administrators can use new security permissions on the Permissions window in Security Management to require employees to enter various additional unit details when adding a unit to inventory. Using these new security permissions, you can require employees to enter the following unit details on the Unit Inventory window in the Unit Inventory module:

- Model
- Status
- Vehicle Identification Number (VIN)
- Year

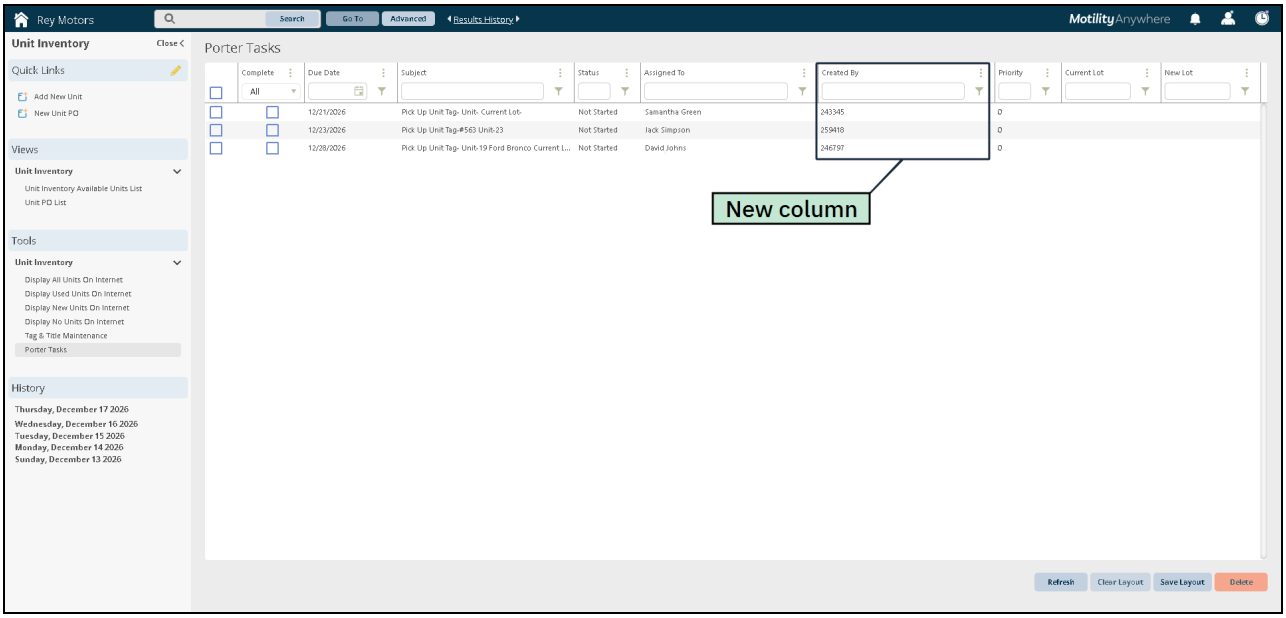
When an employee attempts to add a unit without the required information, a message window displays to notify the employee of the additional information that must be entered for the unit.

Note - For more information on new the security permissions for requiring additional unit details when adding a unit to inventory, refer to page 11.

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Easily identify employees who added porter tasks

When reviewing tasks on the Porter Tasks screen in the Unit Inventory module, you can now more easily determine the employee who added each task. For each task displayed on the Porter Tasks screen, the employee number of the employee who added the task displays in the new **Created By** column.



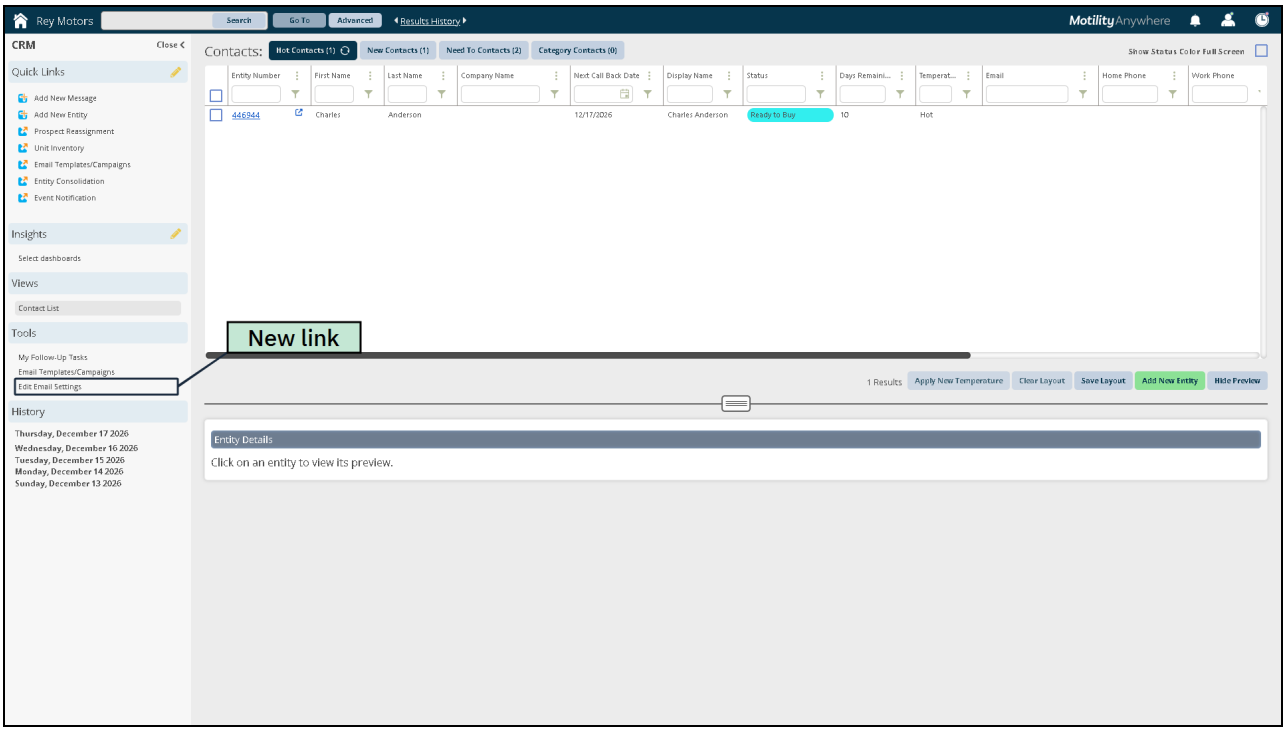
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CRM

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Quickly access Email settings

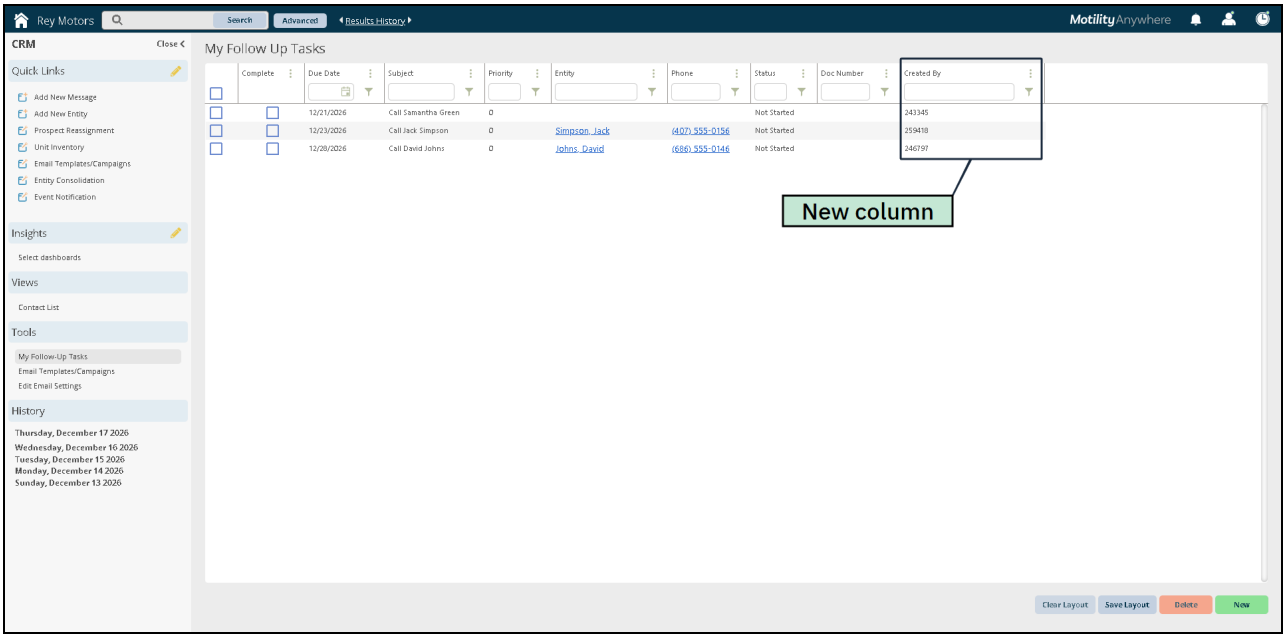
Using a new link in the Tools section in the CRM module, you can quickly access your CRM Email message settings. Simply click the *Edit Email Settings* link to access the CRM-Sales Quoting subtab in the User Settings tab on the Settings screen, where you can review and update your Email message settings, including signature settings, message templates, and preset replies.



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Easily identify employees who added tasks

When reviewing tasks on the My Follow Up Tasks screen in the CRM module, you can now more easily determine the employee who added each task. For each task displayed on the My Follow Up Tasks screen, the employee number of the employee who added the task displays in the new **Created By** column.



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Miscellaneous CRM enhancement

- The entries in the **Memo** field and the **Buyer's Order Memo** field on the Deal window in the Deal Desking module can now be added to event notifications. To add these fields to an event notification, simply select **Quote/Deal** in the **Record Type** field on the Event Notification Setup window. Then select the fields to add in the Fields section, as normal.

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Fixed Operations Enhancements

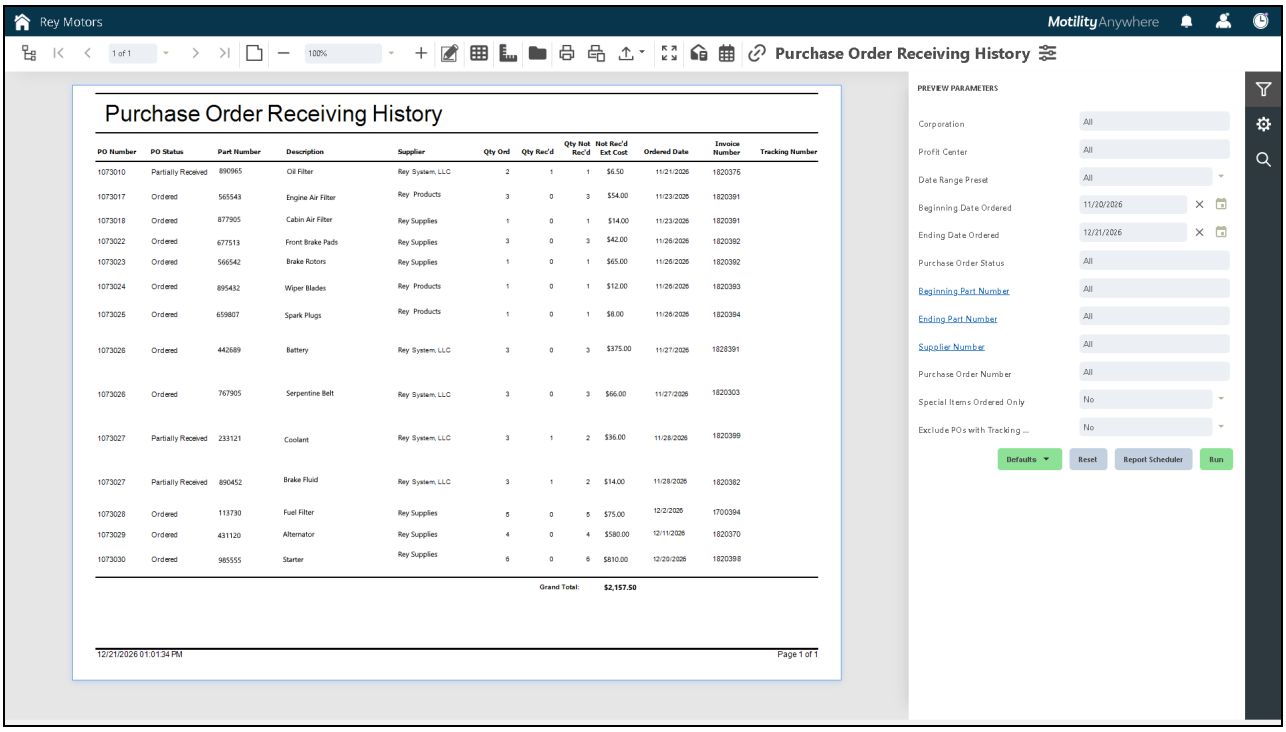
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Parts & Service

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Review parts receiving history using new report

The new Purchase Order Receiving History report is now available in the Reports module for you to easily review receiving history for purchase orders (POs). Using this report, you can review receiving details, such as the part number, part description, and the supplier for the POs included in the report. In addition, you can filter the report to display details for POs in specific statuses, which can be especially useful when you need to review details for POs that have been received or POs that are yet to be received or partially received.



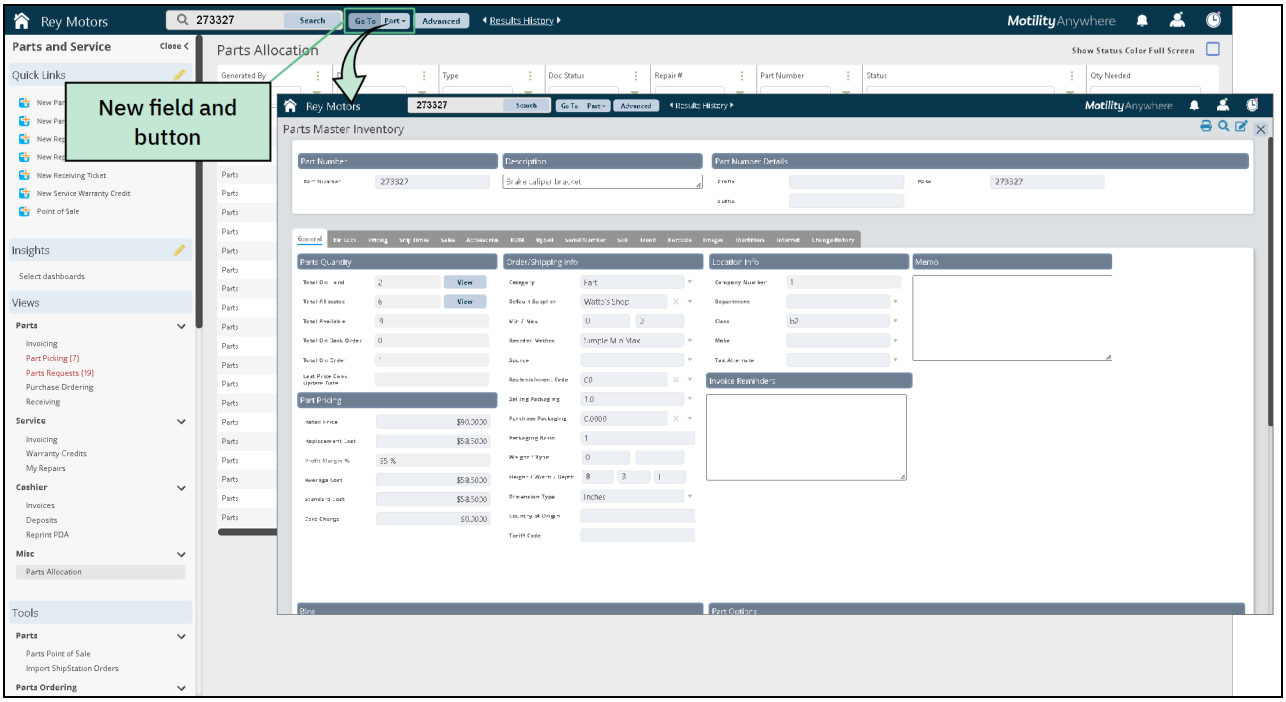
To access the report from the Reports module, select Parts Reports → Ordering & Receiving Reports → Purchase Order Receiving History report.

To request the report, enter criteria in the Preview Parameters section. In the **Purchase Order Status** field, select one or more statuses, such as **Ordered**, **Partially Received**, **Completely Fulfilled**, or **All**. Enter additional criteria as needed, and then click the **Run** button to request the report. A list of ordered parts matching the entered criteria displays on the report.

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Access various parts and service records more quickly

You can now access a specific invoice, part record, purchase order (PO), general purchase order (GPO), or receiving ticket more efficiently in the Parts & Service module. Using a new button and field on the navigation bar, you can quickly access a record using the document number from any screen where the navigation bar displays.



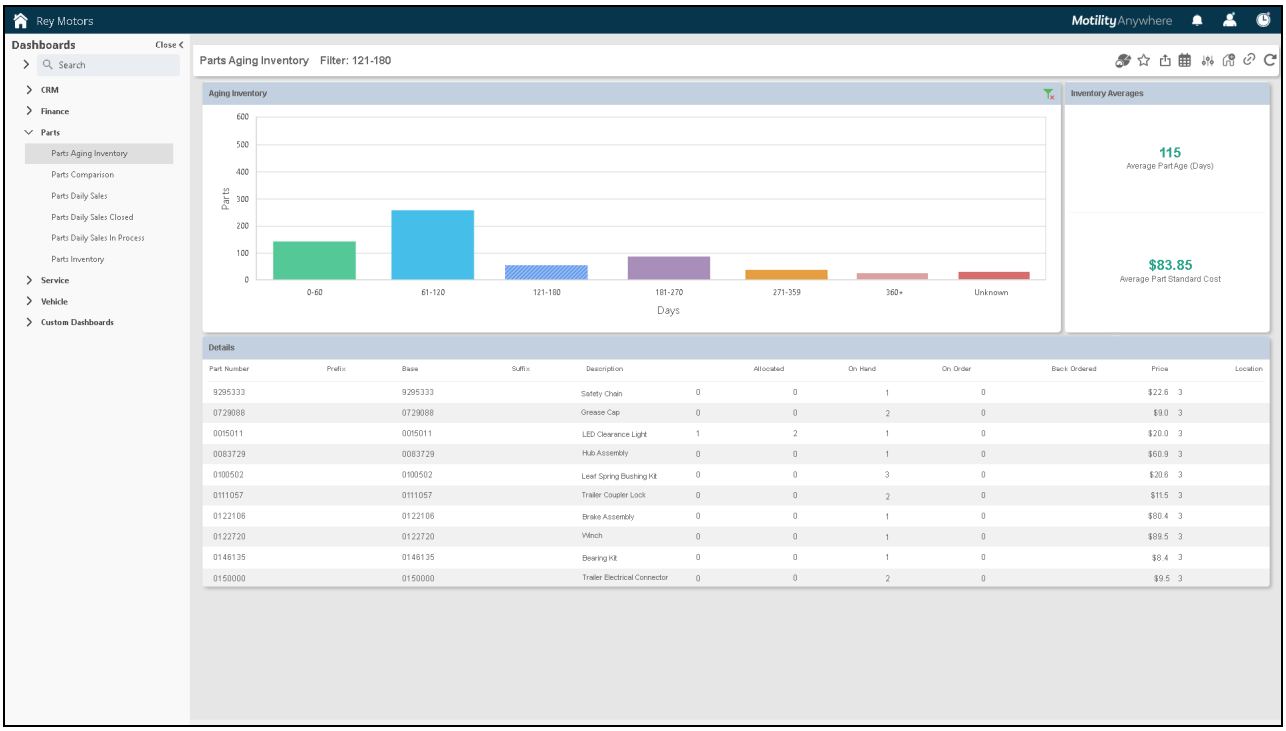
To allow you to search for a document, a new **Go To** button and a new unlabeled **Document** field are available on the navigation bar. To search for a specific document, enter the document number in the **Search** field, simply select the type of document in the **Document** field, and click the **Go To** button. The corresponding document automatically displays on the window associated with the document. For example, to search for a parts record, enter the part number in the **Search** field, select **Part** in the unlabeled **Document** field, and click the **Go To** button. The part record displays on the Parts Master Inventory window.

*Note - If **Invoice** is selected in the unlabeled **Document** field, the search is performed for both service invoices and parts invoices. In addition, if **PO/GPO** is selected in the unlabeled **Document** field, the search is performed for both POs and GPOs.*

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Monitor aging parts inventory using a new Dashboard view

Using the new Parts Aging Inventory view in the Dashboard module, you can easily review aging information for parts based on the number of days since the last transaction date for the parts. This view includes a graph you can use to determine the number of parts that have had no transactions for various age ranges, such as 0-60 or 61-120 days since the last transaction, and you can review details for each part included in an age range. In addition, the view can be used to determine the average number of days since the last transaction and the average part cost for all parts included in the view at a glance.



To access this view, click the *Parts Aging Inventory* link in the Parts section of the Dashboard menu. In the Aging Inventory section, a bar graph illustrates the dynamic count of parts grouped by the number of days since the last transaction for the parts. The Inventory Averages section displays the average age of parts in days and the average part cost.

Additional information for each part included in the view displays in the Details section. Click a bar in the graph to only display details for the parts in the corresponding age range in the Details section.

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The following columns display in the Details section.

- **Part Number.** This column displays the part number for the part.
- **Prefix.** This column displays the prefix for the part.
- **Base.** This column displays the base number for the part.
- **Suffix.** This column displays the suffix for the part.
- **Description.** This column displays the name of the part.
- **Allocated.** This column displays the quantity currently reserved for a specific job, repair order, unit, or customer.
- **On-Hand.** This column displays the quantity physically in stock.
- **On-Order.** This column displays the quantity that has been ordered from a manufacturer or supplier but has not been received.
- **Back-Ordered.** This column displays the quantity ordered but awaiting supplier inventory replenishment.
- **Price.** This column displays the price for the part.
- **Location.** This column displays the location of where the part is stored or assigned within the dealership, such as a warehouse, parts counter, bin, shelf, or dealership branch.

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Business Office Enhancements

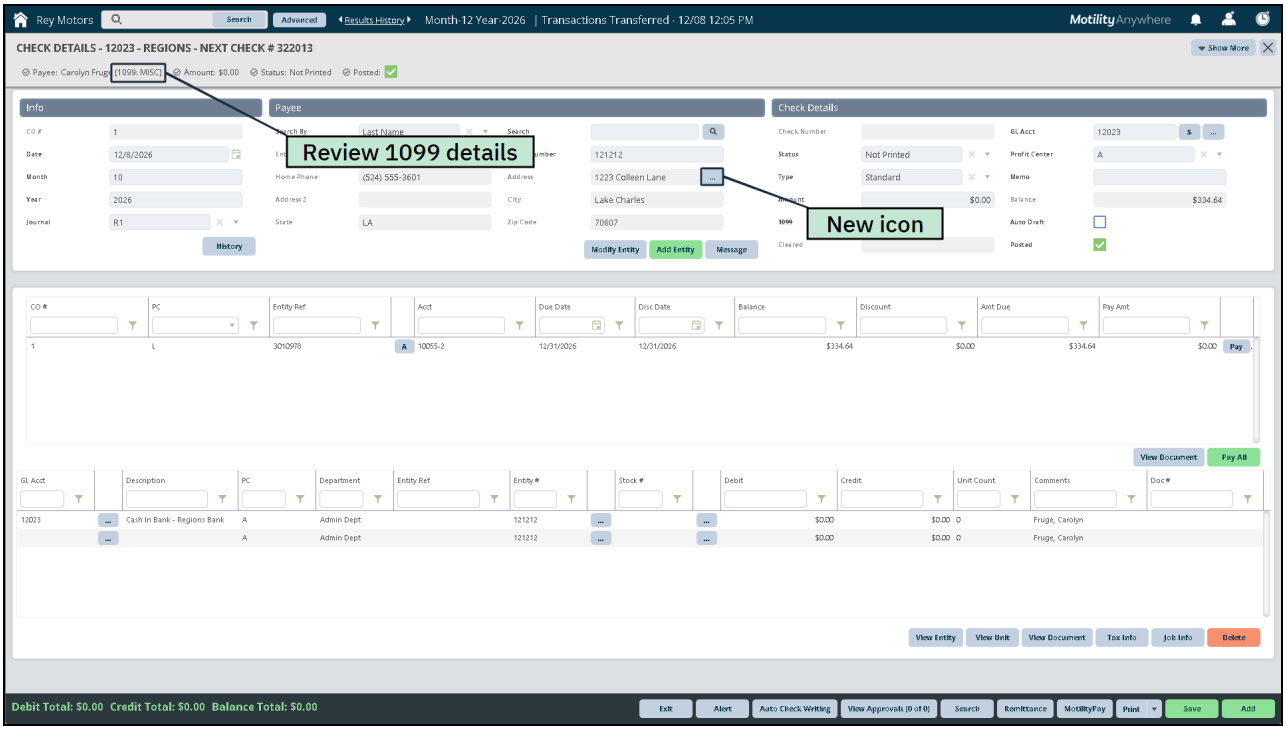
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Accounting

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Review 1099 information and update payee addresses when writing checks

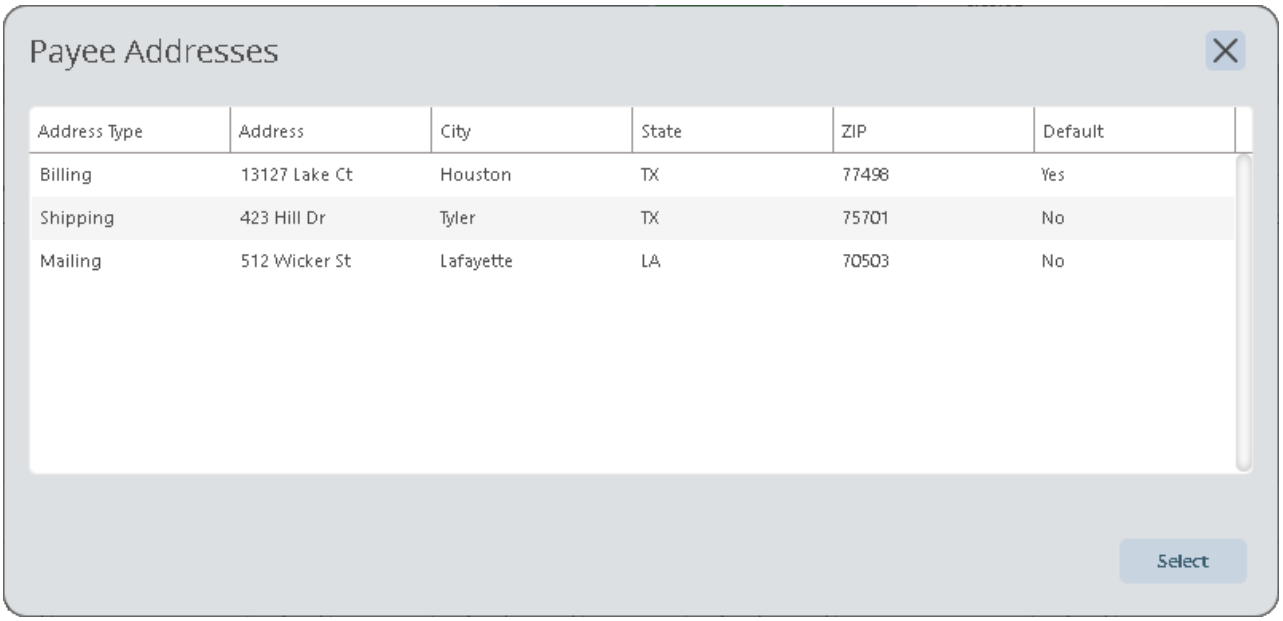
When writing a check for a transaction that should be included on a 1099 form using the Check Details window in the Accounting module, you can now reference the specific 1099 form type for the transaction directly on the window. In addition, if the payee address for a check should be an alternate address defined for the entity, you can now select an alternate payee address directly from the Check Details window using a few simple steps.



When the **1099** check box is selected on the Check Details window, the entry in the **1099 Box** field on the Entity window in the CRM module for the entity now displays at the top of the Check Details window. For example, **1099-MISC** or **1099-NEC** may display next to the payee name for you to easily reference the specific 1099 form type associated with the payment.

In addition, you can now easily update the payee address on the Check Details window if an alternate address defined for the entity should be used. To allow you to select an alternate payee address, a new ... (Ellipsis) icon is available in the **Address** field. Click this icon to display the new Payee Addresses window, where all addresses defined for the entity record display.

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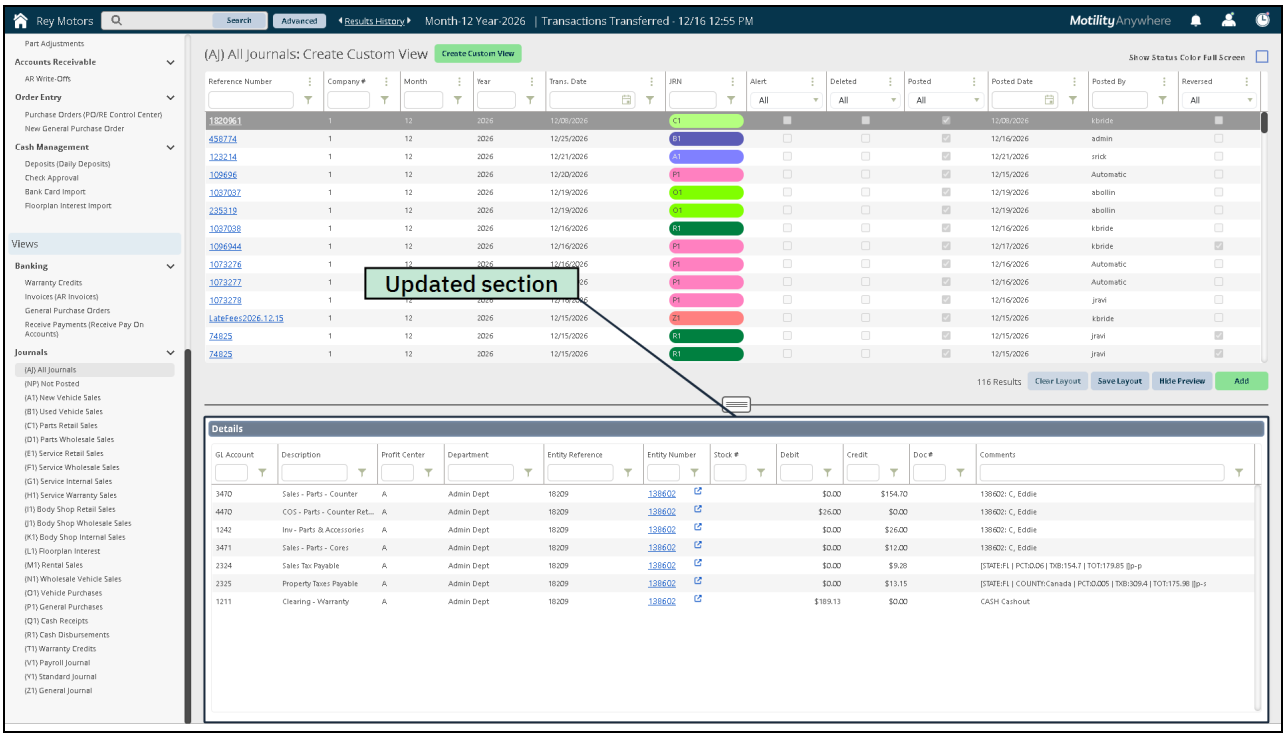


Simply select the payee address for the check and click the **Select** button. The Payee Addresses window closes, and the selected address is entered on the Check Details window.

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Review journal entry details more easily

On various screens used to review transactions in the Accounting module, the Details section has been redesigned to display transaction information in columns. In this updated section, you can filter data and scroll though transactions, helping you review the transactions more easily. In addition, you can now access the entity record for a transaction directly from the Details section using a new link.



To filter transactions in the Details section, simply enter criteria in the corresponding column heading, as normal.

If you need to review details for the entity associated with a transaction, simply click the link in the **Entity Number** column for the transaction to display the entity record on the Entity window. Alternatively, click the (New Tab) icon to display the entity record in a new Internet browser tab.

Additional information

- The **Job Info** button and the **Tax Info** button have been removed.

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