

April 2021 Release Enhancements

Associate User Rights with Edit Email Templates Functionality

Dealers can limit employee access at the dealership for editing email templates.

ADMINISTRATOR TOOLS	
<input checked="" type="checkbox"/> Can Add/Edit/View Portfolios	<input checked="" type="checkbox"/> Can Add/Edit/View Channels
<input checked="" type="checkbox"/> Can Add/Edit/View Users	<input checked="" type="checkbox"/> Can View Audits
<input checked="" type="checkbox"/> Can Manage Chart Of Accounts	<input checked="" type="checkbox"/> Can Manage Collection Queues
<input checked="" type="checkbox"/> Can Add/Edit Automated Tasks	<input checked="" type="checkbox"/> Can Send Email Messages
<input checked="" type="checkbox"/> Can Send Text Messages	<input checked="" type="checkbox"/> Can Freeform Email Messages - Marketing
<input checked="" type="checkbox"/> Can Freeform Email Messages - Accounts	<input checked="" type="checkbox"/> Can Freeform Text Messages - Accounts
<input checked="" type="checkbox"/> Can Freeform Text Messages - Marketing	<input checked="" type="checkbox"/> Can Configure Institution
<input checked="" type="checkbox"/> Can Add/Edit/Delete Flags	<input checked="" type="checkbox"/> Can Add/Edit/View Public Bins
<input checked="" type="checkbox"/> Can Manage Communication Templates	<input checked="" type="checkbox"/> Can Close EPS Accounts
<input checked="" type="checkbox"/> Can Delete GL Transactions	<input checked="" type="checkbox"/> Can Undo Post GL Transactions
<input checked="" type="checkbox"/> Can Update Accounting Service	<input checked="" type="checkbox"/> DS University Manager
<input checked="" type="checkbox"/> Read-Only Credit Bureau ID Code	<input checked="" type="checkbox"/> Can View Metro2 Files
<input type="checkbox"/> Exclude from AppCues	<input checked="" type="checkbox"/> Can Configure User Defined Fields
<input checked="" type="checkbox"/> Can View GL data	<input checked="" type="checkbox"/> Can Post Misc Money In/Out
<input checked="" type="checkbox"/> Can Access MarketPlace	

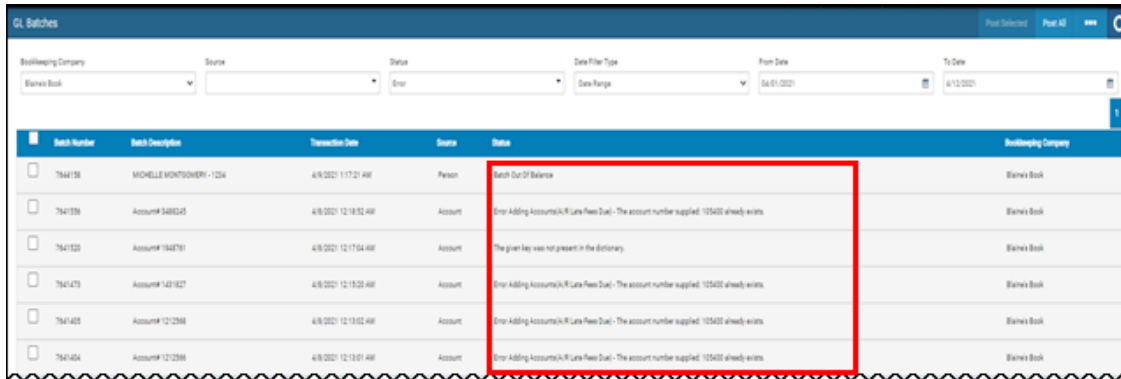
New Report Fields to Calculate the Number of Days Past for Each Balance Type

Dealers can track the number of days past due for each balance type as well as at individual balances level. Report fields track the number of days past due for each balance type for Primary Loan, Side Note, Ins Loan/CPI at summary as well as at individual balances level.

Days Past Due				Cancel	Update Report
<div> <div> <div>Days Past Due</div> <div>Status: Active</div> <div>Category: (No Fields)</div> <div>Owner: (Public)</div> <div>Primary Data Source: Account</div> </div> <div> <div>DETAIL</div> <div>COLUMNS</div> <div>FILTERS</div> <div>PERMISSIONS</div> <div>SCHEDULE</div> <div>NOTES</div> </div> </div>					
Field Name	Column Header	Data Source Name			
Account ID	Account ID	Account			
Ins Loan / CPI Days Past Due	Ins Loan / CPI Days Past Due	Account Balance Summary			
Side Loan Days Past Due	Side Loan Days Past Due	Account Balance Summary			
Primary Loan Days Past Due	Primary Loan Days Past Due	Account Balance Summary			
# of Days Past Due	# of Days Past Due	Balances			

Improved QuickBooks User Error Messages for GL Batch Posting

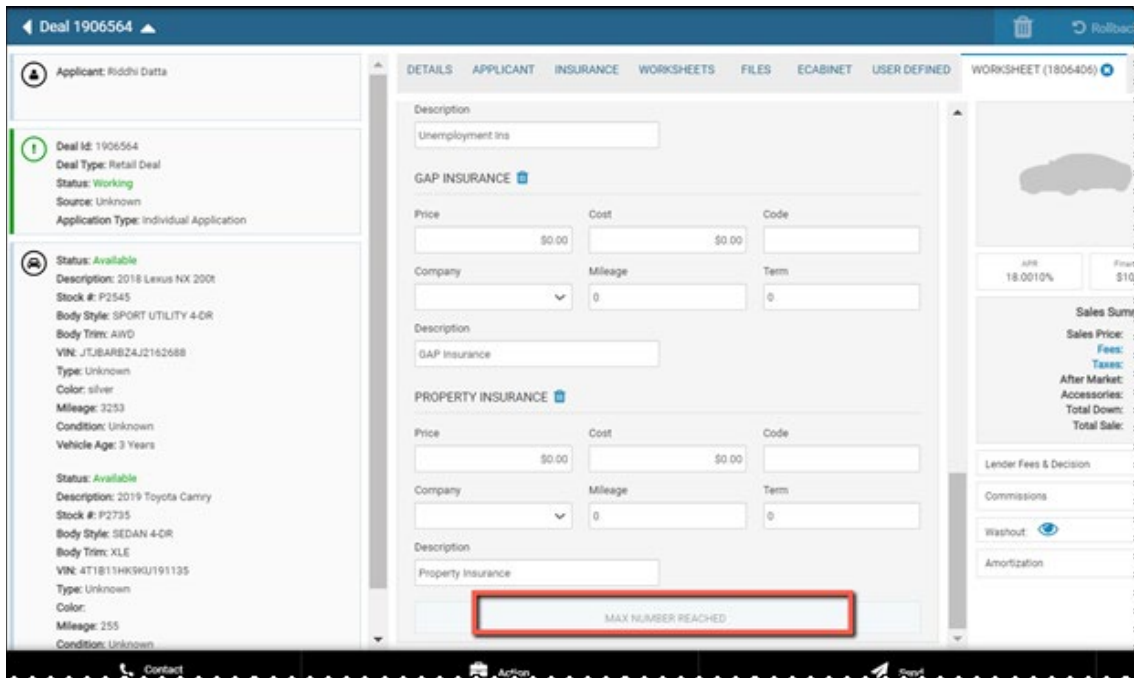
Dealers can trace errors easier with user friendly error messaging when posting GL batches to QuickBooks.



Batch Number	Batch Description	Transaction Date	Source	Status	Bookkeeping Company
764138	MONICELLE MONTGOMERY - 1284	4/9/2021 11:17:21 AM	Person	Batch Out Of Balance	Warner's Book
764139	Account# 3480245	4/9/2021 12:18:52 AM	Account	Error Adding Account# 3480245 - The account number supplied: 105405 already exists.	Warner's Book
764139	Account# 3480245	4/9/2021 12:17:54 AM	Account	The given key was not present in the Dictionary.	Warner's Book
764143	Account# 1421827	4/9/2021 12:15:25 AM	Account	Error Adding Account# 1421827 - The account number supplied: 105405 already exists.	Warner's Book
764145	Account# 1212568	4/9/2021 12:18:02 AM	Account	Error Adding Account# 1212568 - The account number supplied: 105405 already exists.	Warner's Book
764145	Account# 1212568	4/9/2021 12:18:01 AM	Account	Error Adding Account# 1212568 - The account number supplied: 105405 already exists.	Warner's Book

Improved User Experience When Adding Aftermarket Products

The user interface allows a user to add to the designated limit of aftermarket products in addition to the predefined items, at which point the button to add another, updates with a message, *Max Number Reached* and is disabled when no further products can be added.



Deal 1906564

Applicant: Riddhi Datta

Deal ID: 1906564
Deal Type: Retail Deal
Status: Working
Source: Unknown
Application Type: Individual Application

Status: Available
Description: 2018 Lexus NX 200t
Stock #: P2545
Body Style: SPORT UTILITY 4-DR
Body Trim: AWD
VIN: JTJBARBZ4J2162688
Type: Unknown
Color: silver
Mileage: 3253
Condition: Unknown
Vehicle Age: 3 Years

Status: Available
Description: 2019 Toyota Camry
Stock #: P2735
Body Style: SEDAN 4-DR
Body Trim: XLE
VIN: 4T1B11HK9K191135
Type: Unknown
Color:
Mileage: 255
Condition: Unknown

DETAILS | APPLICANT | INSURANCE | WORKSHEETS | FILES | ECABINET | USER DEFINED | WORKSHEET (1806405)

Description: Unemployment Ins

GAP INSURANCE

Price: \$0.00 Cost: \$0.00 Code:
Company: Mileage: 0 Term: 0
Description: GAP Insurance

PROPERTY INSURANCE

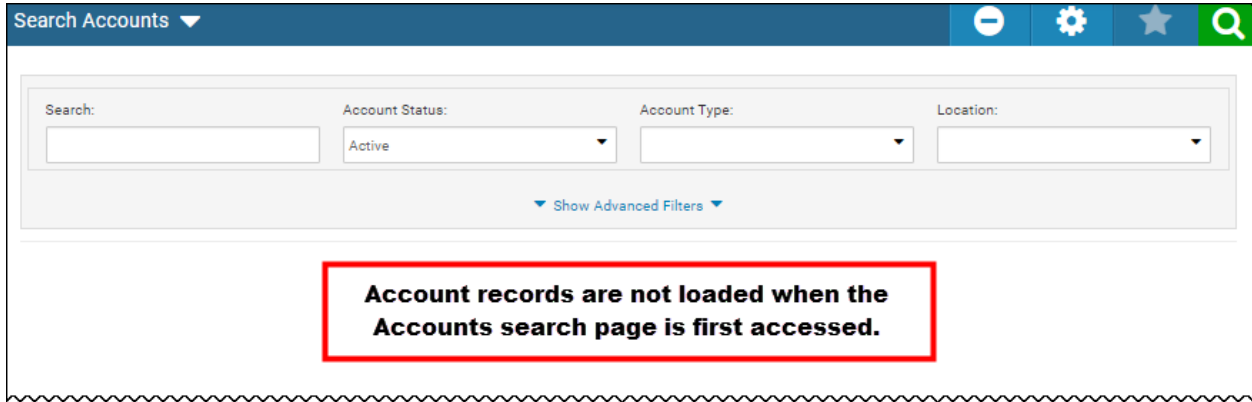
Price: \$0.00 Cost: \$0.00 Code:
Company: Mileage: 0 Term: 0
Description: Property Insurance

MAX NUMBER REACHED

Sales Summary
Sales Price:
Fees:
Taxes:
After Market:
Accessories:
Total Down:
Total Sale:
Lender Fees & Decision
Commissions
Washout
Amortization

Search Accounts Page Enhancement

The search screen now only loads accounts after a search has been initiated by entering search criteria first enhancing overall performance and assisting you in searching specific accounts faster and easier.



The screenshot shows the 'Search Accounts' interface. At the top is a blue header bar with the text 'Search Accounts' and a dropdown arrow, followed by icons for a minus sign, settings, a star, and a search magnifying glass. Below the header is a search filter section with four fields: 'Search:' (a text input), 'Account Status:' (a dropdown menu showing 'Active'), 'Account Type:' (a dropdown menu), and 'Location:' (a dropdown menu). Below these fields is a link that says 'Show Advanced Filters'. In the center of the page, a red-bordered box contains the text: **Account records are not loaded when the Accounts search page is first accessed.**