

5/4/2021 Deployment Notes

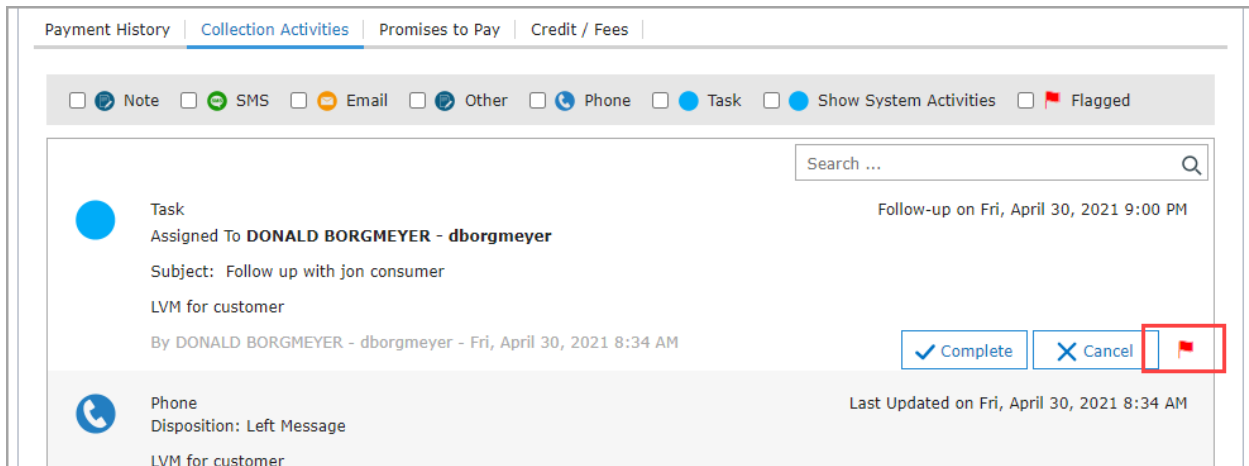
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BHPH

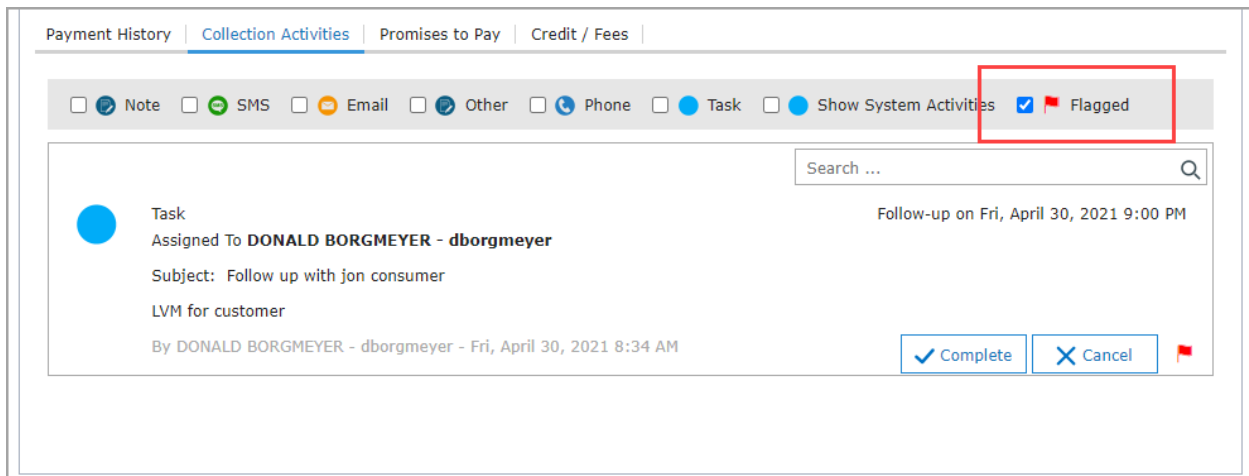
329712 - Add Flagging to Collection Notes

We have added a flag icon to the BHPH collection activities that dealers can use to mark an activity as important.



The screenshot shows the 'Collection Activities' tab in a software interface. At the top, there are navigation tabs: 'Payment History', 'Collection Activities', 'Promises to Pay', and 'Credit / Fees'. Below these is a filter bar with icons for Note, SMS, Email, Other, Phone, Task, Show System Activities, and Flagged. The 'Flagged' filter is currently unchecked. A search bar is located to the right of the filter bar. The main content area displays a task record with a blue circle icon. The task details are: 'Task', 'Assigned To DONALD BORGMEYER - dborgmeyer', 'Subject: Follow up with jon consumer', 'LVM for customer', and 'By DONALD BORGMEYER - dborgmeyer - Fri, April 30, 2021 8:34 AM'. The task is scheduled for 'Follow-up on Fri, April 30, 2021 9:00 PM'. At the bottom right of the task record, there are three buttons: 'Complete', 'Cancel', and a red flag icon, which is highlighted with a red box. Below the task record, there is a phone icon and the text 'Phone Disposition: Left Message' and 'LVM for customer', with a timestamp 'Last Updated on Fri, April 30, 2021 8:34 AM'.

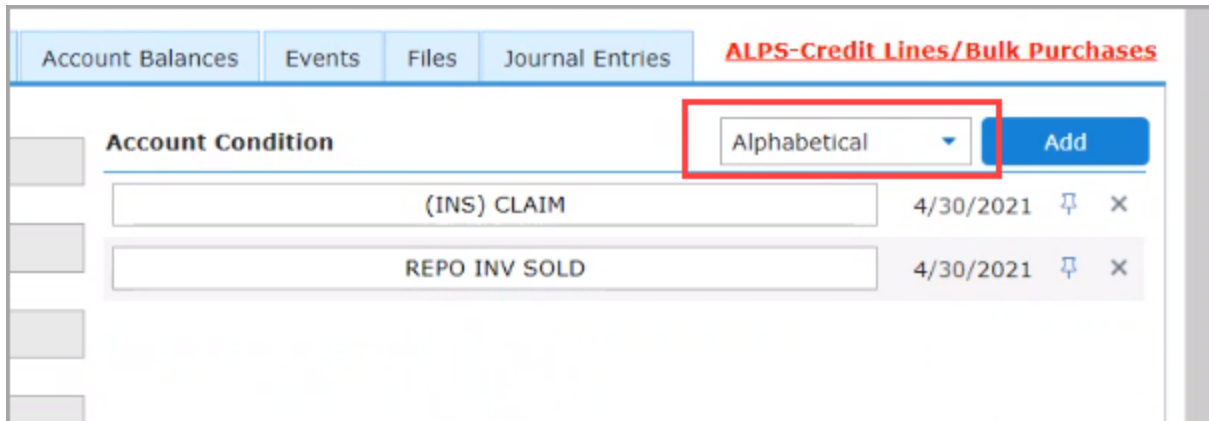
Additionally, we have added a Flagged filter to the activity header to allow dealers see only the flagged records.



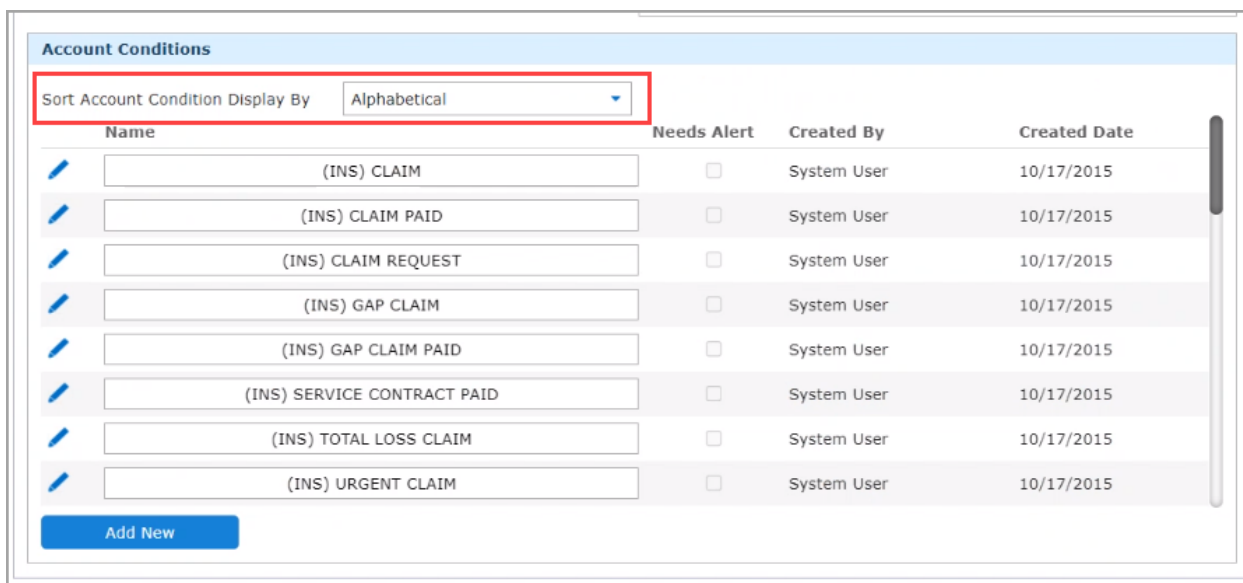
This screenshot is similar to the one above, but the 'Flagged' filter in the filter bar is now checked, and the red flag icon is highlighted with a red box. The task record below remains the same, but the red flag icon at the bottom right of the task record is now visible, indicating that the task has been flagged.

335695 - Add Sorting to Account Conditions

We have added a new control to allow dealers to sort the account condition either by date added or alphabetically.

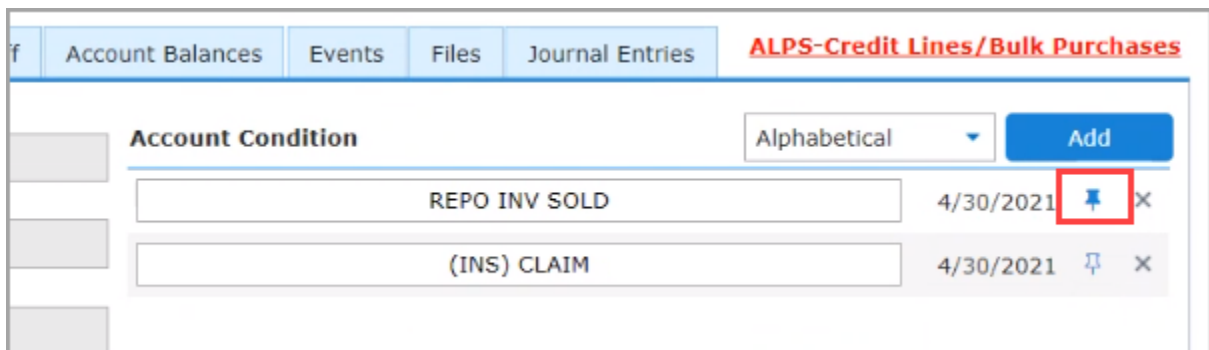


Dealers can set this as the default in the Account Condition section of BPHH settings.



335696 - Pin an Account Condition in the First Position

We have added the ability for the dealer to pin an account condition to the top of the condition list by clicking the pin icon on the condition. If multiple conditions are pinned, the most recently pinned will be in the top position.



335703 - Add Account Conditions to the Payment Level Reporting

We have added the account condition as a field to the BPHH payment level reports. The dealers can add this new column to their existing reports, and it will show the accounts conditions as a list in the column.

Account Conditions
MILITARY REWRITE DO NOT REPO MILITARY
ACCOUNT REWRITE - OTHER MILITARY REWRITE DO NOT REPO MILI...
DUE DATE CHANGE REQUEST CHECKS ONLY IMPOUND REPOSSESSI...
MILITARY REWRITE DO NOT REPO MILITARY ACCOUNT REWRITE - O...
DUE DATE CHANGE DENIED CASH PAYMENTS ONLY DO NOT REPO ...
MILITARY REWRITE DO NOT REPO MILITARY IRS FORM 8300 NEEDED
MILITARY REWRITE DO NOT REPO MILITARY
COVID-19 REPORTING ACCOMMODATION

Dealers can filter for a particular condition by adding a contains filter to return only the accounts where the condition contains that word/phrase

Report Settings ✕

Report Information Columns **Advanced Filter** Sorting Summary

AND OR + Add Filter + Add Group ✕








Account Conditions ▼ Contains ▼ deferred down ▼ ✕

Account Conditions
DEFERRED DOWN PAYMENTS STILL DUE
DEFERRED DOWN PAYMENTS STILL DUE
DEFERRED DOWN PAYMENTS STILL DUE
DEFERRED DOWN PAYMENTS STILL DUE ACCOUNT REWRITE - HARD...

DEAL

325074 - New Setting to Control TAVT Tax Default

We have added a new setting in GA to allow dealer to turn off the default use of the TAVT. The current behavior is to use the TAVT by default, but several dealers asked for a setting to disable this for their deals.

 Dealer Profile	 Customer	 Deal	 Inventory	 BHPH	 carzing	 Accounting
Deal Management	SMS and Email Options	Partner Settings				
Taxes State Tax: 6.60000 % TSPLOST: 0.00000 % County Tax: 0.00000 % <input type="checkbox"/> Use TAVT			Financing APR/Add-On (Precomputed): 0.000 % Form Type: ▼			
Flooring Cost						

334795 - Switch FL to New Tax Service

We will be switching FL to our new automated tax provider. The functionality stays the same, but the underlying data will be coming from a different source, which will resolve some of the issues we've recently encountered with incorrect rates in a few counties