



Dealertrack uniFI®
**QUICK
REFERENCE
GUIDE**



GET THE MOST OUT OF Dealertrack uniFI®



Start, Structure, Finance and Transact
the deal all in one online deal jacket.



Efficiency

Gain more insight into your customers and business from one system. Use fewer keystrokes and reenter less data to save time and create a more efficient workflow.

Profitability

Work more deals and increase profit with a faster and more efficient workflow. Increase add-on sales with a customer-friendly F&I process.

Customer Experience

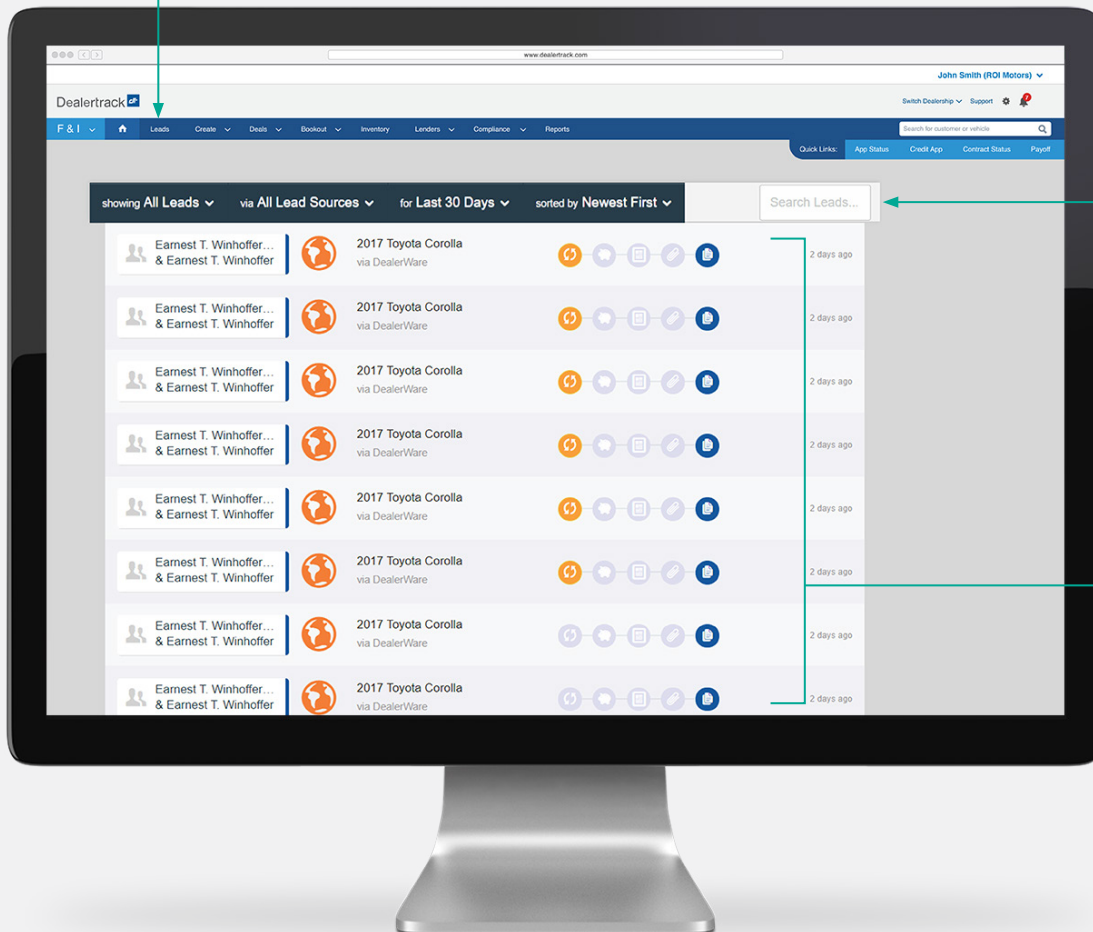
With streamlined dealer workflows, you'll significantly reduce customer wait times, which means more time for more customers— and bigger profits.

GETTING STARTED

- Accessing Leads
 - Getting to your leads
 - Understanding the details in the lead
- DMS Integration – Pick up deals from your DMS
- Credit Applications
 - Credit Application Layouts
 - Credit Application Settings – Taxes and Fees Setup
 - Credit Bureaus
- Bookout
 - Integrated Bookout Values in the Credit App
 - Vehicle Valuation Process
- Locate Deals
- Deal Status
- Deal Jacket
- Requesting Payoff Quotes
- Compliance
 - Running Compliance – Red Flags/OFAC
 - Compliance Actions
 - Compliance Activity
- Document Storage
- Deal Calculator
- Menu Selling
- Accelerated Title®



GETTING TO YOUR LEADS



Click the Leads tab, located on the blue navigation bar.

All leads will appear here, whether from pre-approved providers or your Digital Retailing enabled-website.

SEARCH & FILTER

LEAD TYPE

UNDERSTANDING THE DETAILS IN THE LEAD



Depending on where the lead came from there will be different information available. You can quickly and easily pre-fill a deal jacket from the lead detail screen.

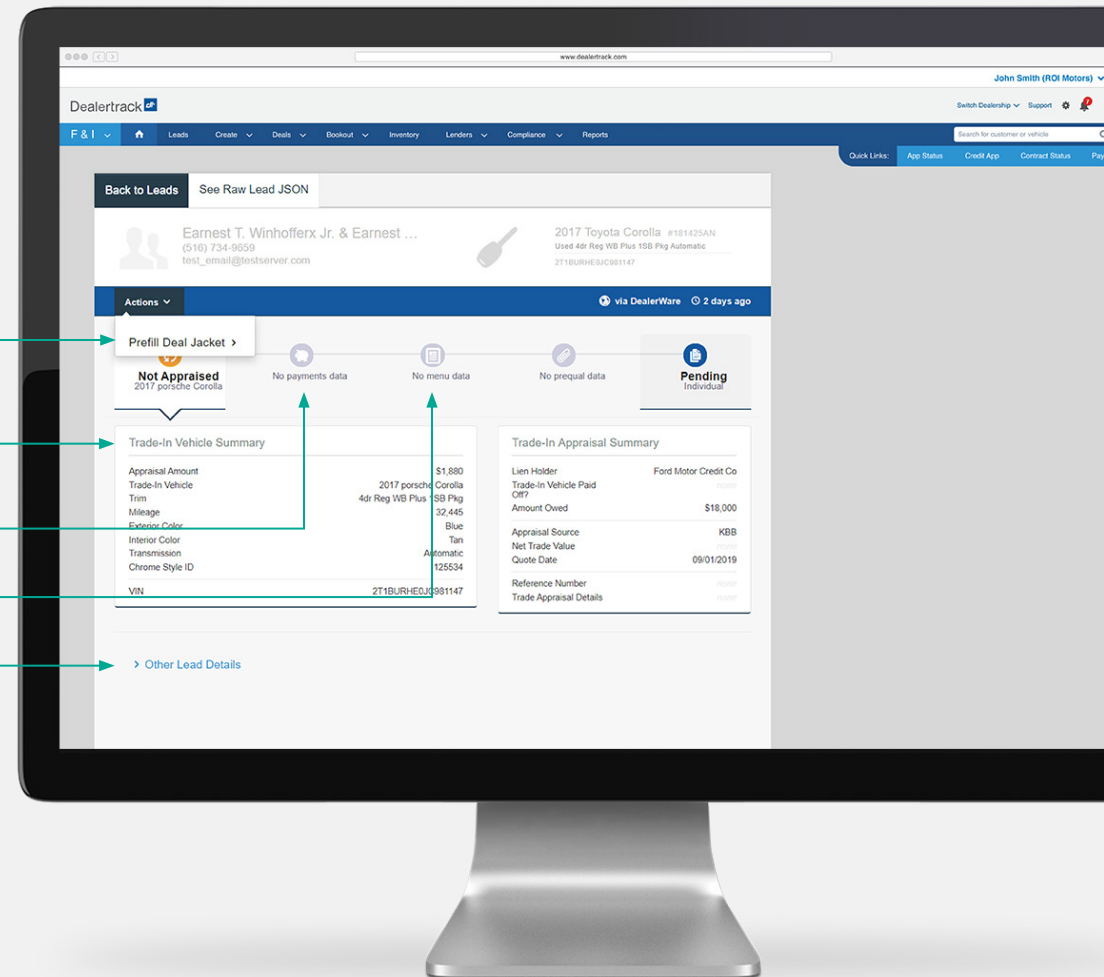
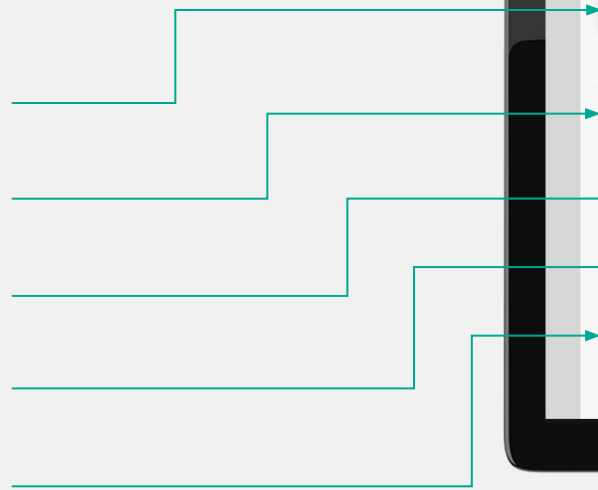
PRE-FILL DEAL JACKET

TRADE-IN INFORMATION

PAYMENT INFORMATION

F&I PRODUCT INFORMATION

BASIC LEAD DETAILS



PICK UP DEALS FROM YOUR DMS



Bring in deals from your DMS by utilizing DealTransfer*.

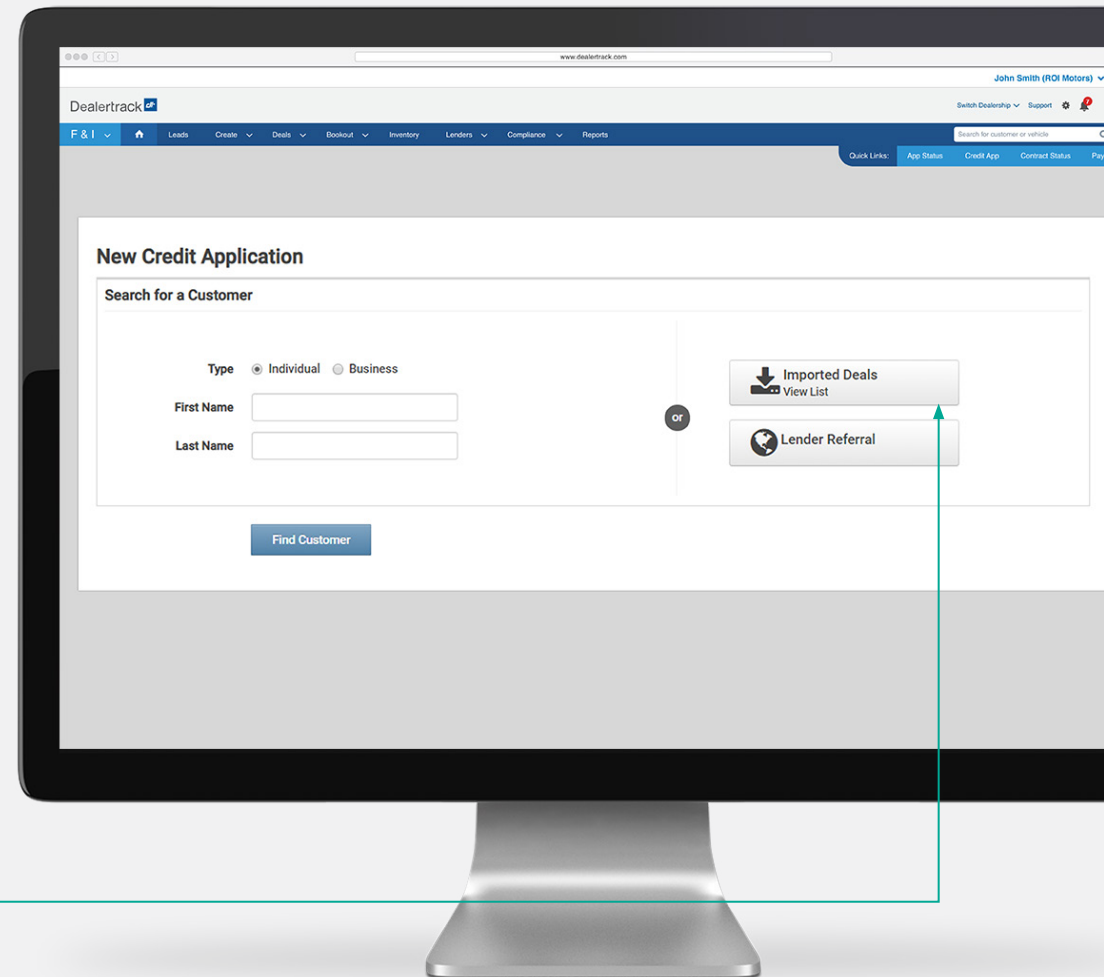
DMS Integration is currently supported for the below providers.

1. CDK Global
2. Reynolds & Reynolds
3. AutoSoft
4. Grapevine
5. Advent

TRANSFER DEAL DATA FROM DMS

Call us today to get started with DealTransfer.
877-453-9912 | Option 6

*Subscription required.

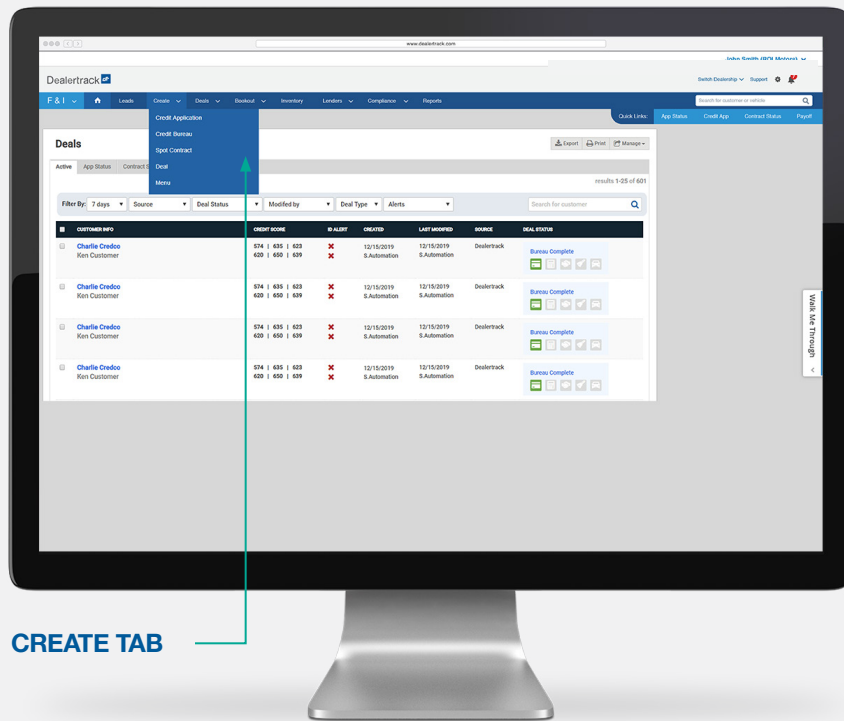


A STREAMLINED CREDIT APPLICATION PROCESS

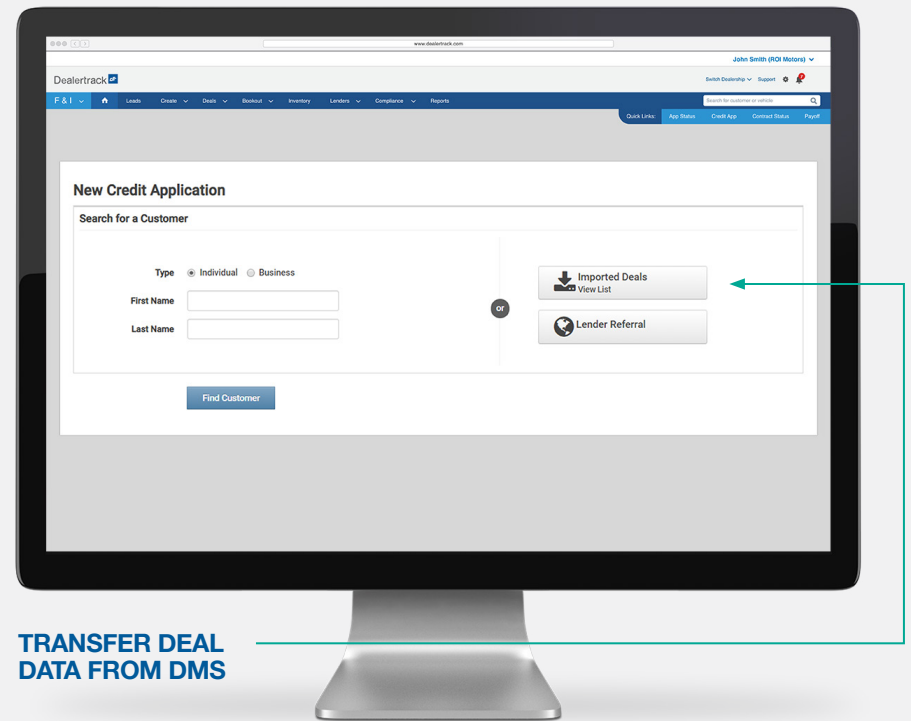


Click Create in the top navigation bar. Next, click Credit Application.

Here, you can search for an existing customer and avoid duplicate entries. Create a new customer or quickly import a deal.



CREATE TAB



TRANSFER DEAL DATA FROM DMS

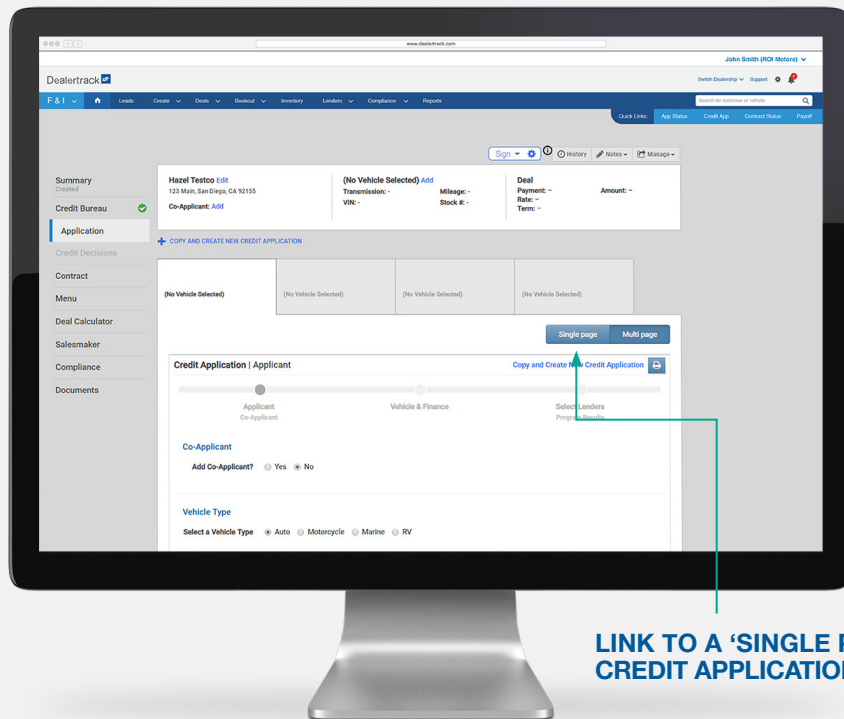
AN EFFICIENT CREDIT APPLICATION PROCESS



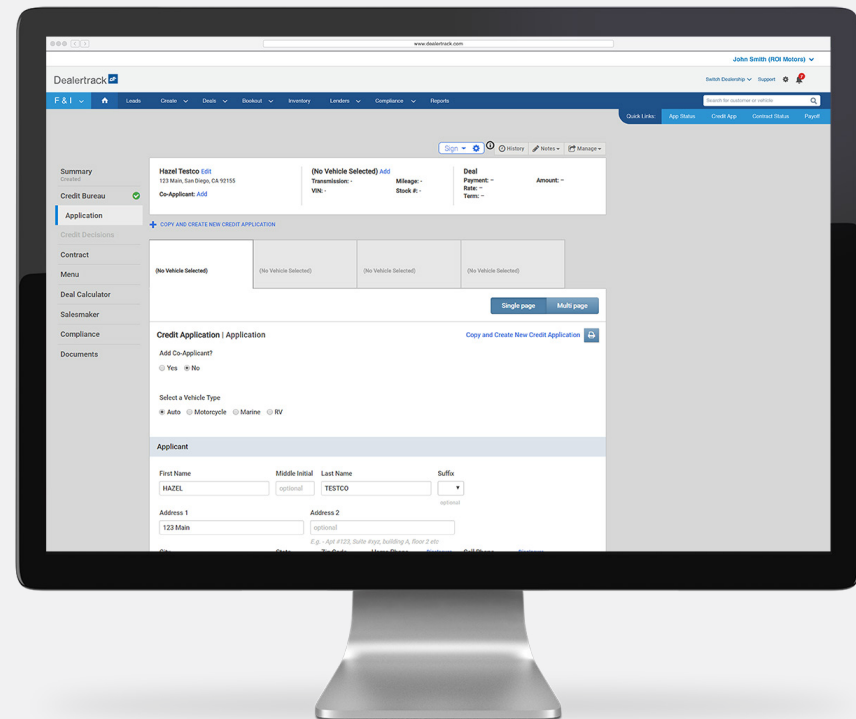
The multi-page credit application will remain the default view and has 3 different sections:

1. Applicant
2. Vehicle & Finance
3. Select Lenders

You can easily switch to a single page credit application and drive through the process faster.



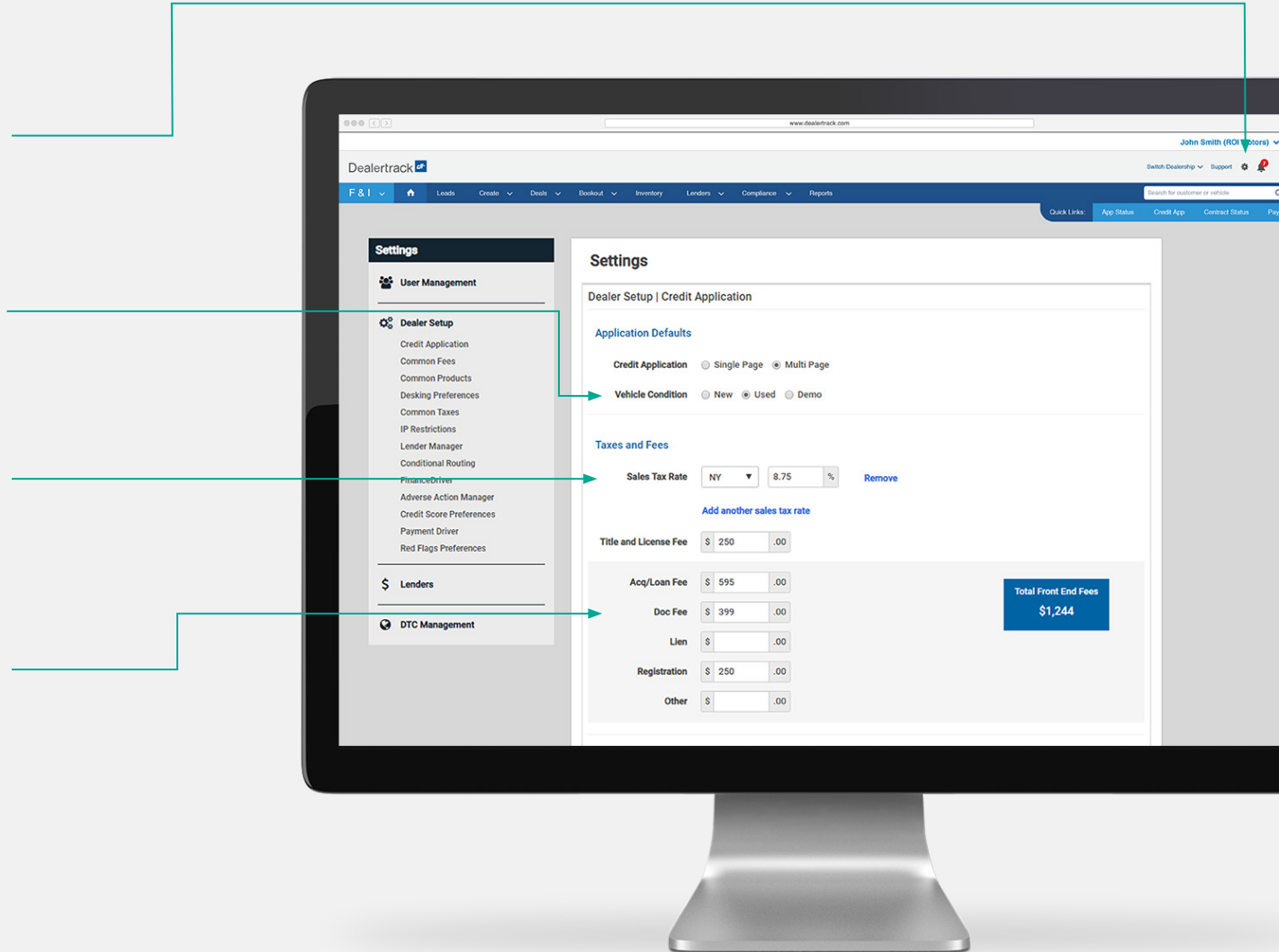
LINK TO A 'SINGLE PAGE CREDIT APPLICATION'



CREDIT APPLICATION SETTINGS TAXES & FEES SETUP

To access the Settings page, click the gear icon — located on the top right of the screen.

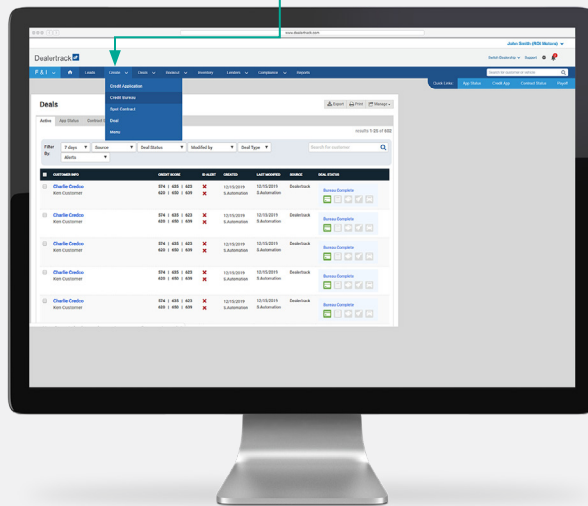
1. You can now select your vehicle default. If you're predominately a Used store, click 'Used'.
2. In the 'Taxes and Fees' section, choose your state and enter in the tax rate. The tax rate will be multiplied by the cash selling price and the calculation will be done for you.
3. Then enter your applicable fees and click 'Save'.



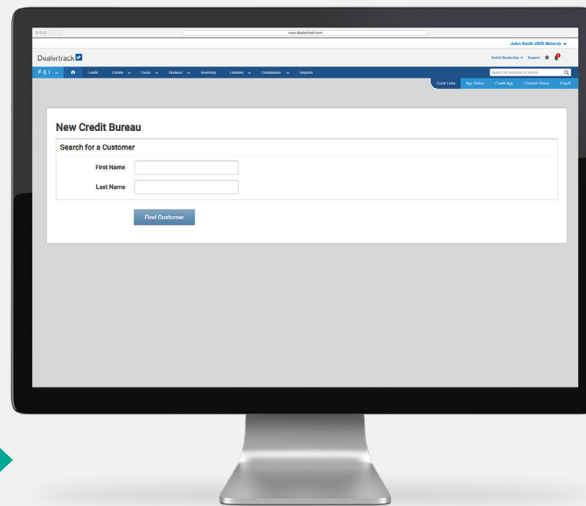
PROCESS CREDIT BUREAUS QUICKLY



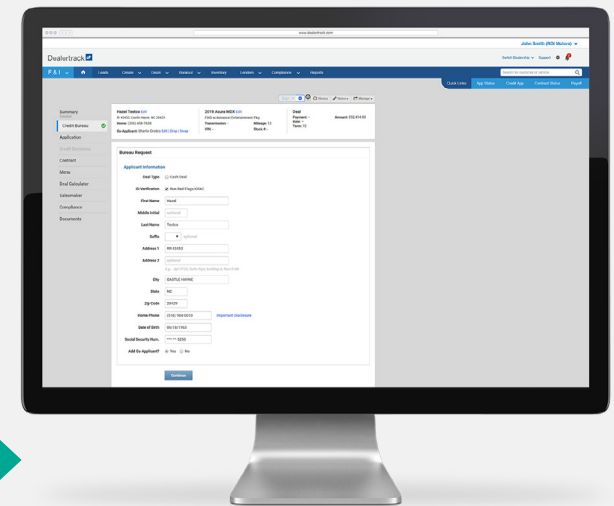
CREATE TAB



Click Create in the top navigation bar. Next, click Credit Bureau.



Quickly search for an existing customer to avoid duplicate entries or create a new customer.



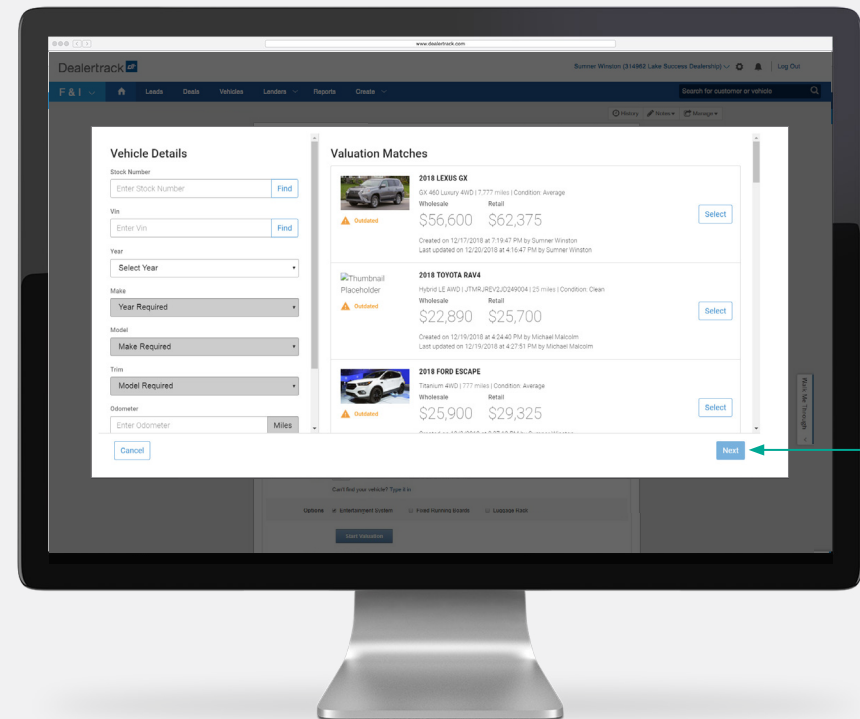
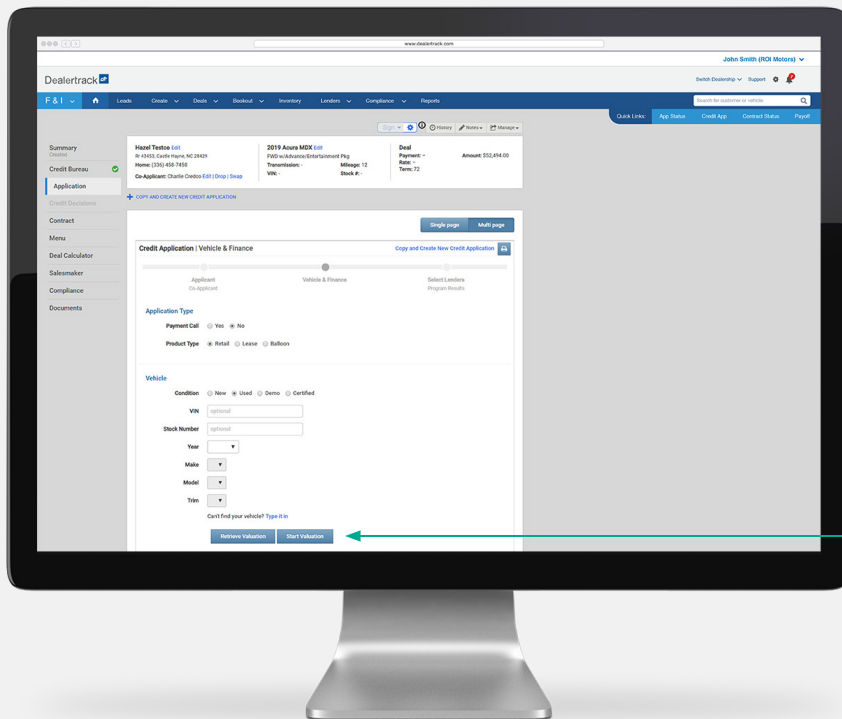
Credit bureau request forms will be 40% pre-filled if you are pulling bureaus on Dealertrack, saving you time.

INTEGRATED BOOKOUT VALUES IN THE CREDIT APP

1. Once you arrive to the vehicle section of the credit app, you will be able to start the vehicle valuation
2. Key in the details or simply key in the VIN number and watch the year, make, model and trim populate

3. Fill in the odometer field
4. Click 'Start Valuation'

AN INTERFACE WILL OPEN UP – SIMPLY CLICK NEXT TO BEGIN THE VALUATION PROCESS



SIMPLE AND EASY VEHICLE VALUATION PROCESS



SWITCH TO CHOOSE PROVIDER

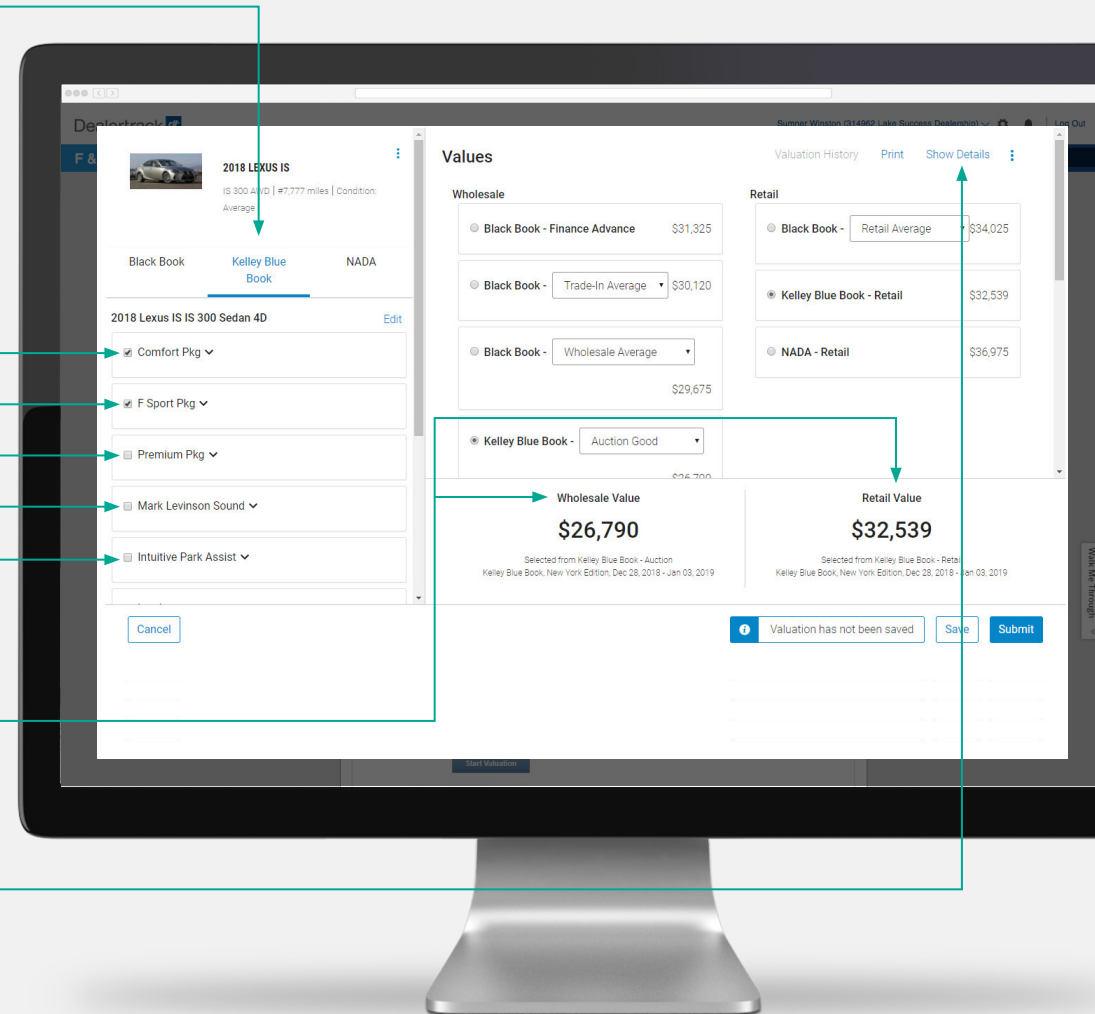
CHOOSE THE OPTIONS

CHOOSE THE VALUE

SHOW DETAILED ADJUSTMENTS
OF EACH VALUE

After selecting the values:

- Easily submit them back to the credit application where they will be populated for you
- Generate and print a PDF



THE DEALS PAGE — YOUR GATEWAY TO EVERY DEAL



CUSTOMER DEAL JACKETS:

Each customer has a deal jacket - with all deal information associated for that customer.

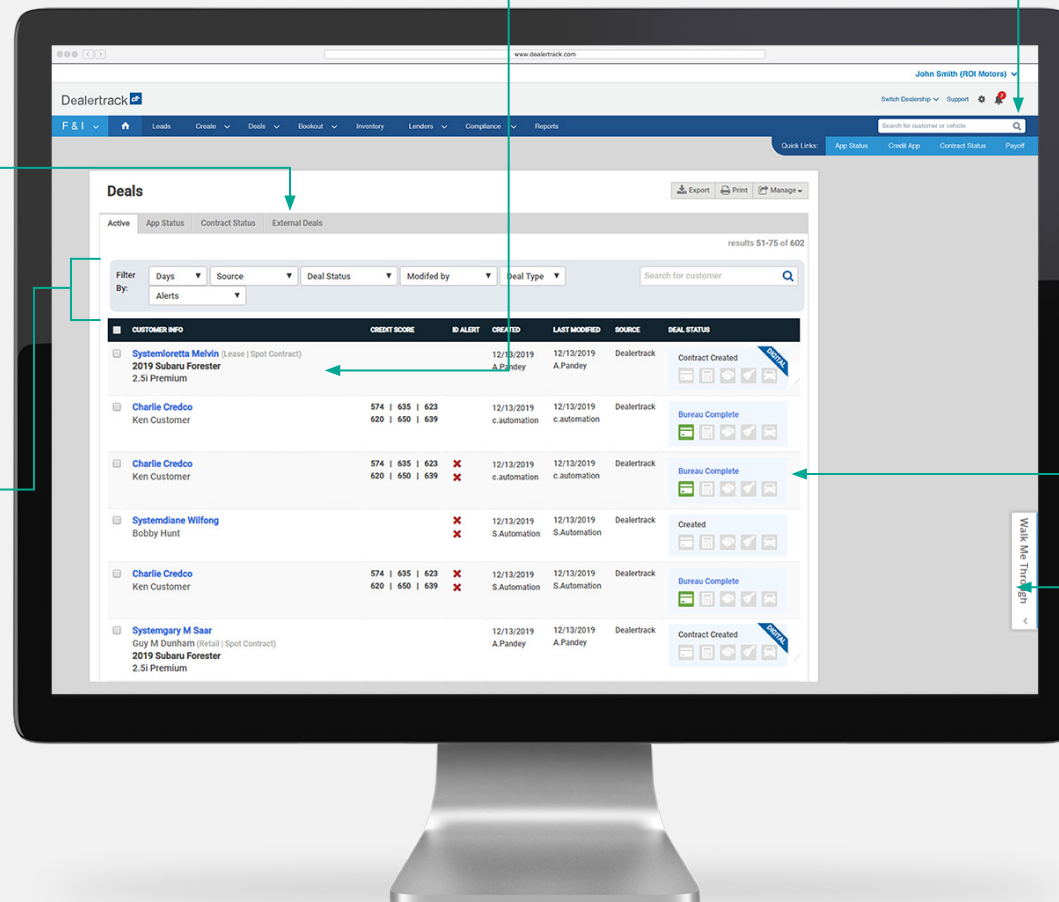
LOCATE DECISIONS ON YOUR DEALS:

All app status and contract status details can be found in one view.

CUSTOMIZE YOUR VIEW:

Filter your deals to show the most pertinent information, including:

- Created date
- Status of deals
- Dealership user
- Deal type



SEARCH YOUR ENTIRE NETWORK:

Locate a specific customer and pick up right where you left off.

IMMEDIATE VISIBILITY INTO CURRENT DEALS:

Hover over status icons to view the most recent updates for your deals. Click on the status pop-up to take you directly to the page you want work on:

- Credit Bureau, Credit App, Desking, Menu, and Contract Screen

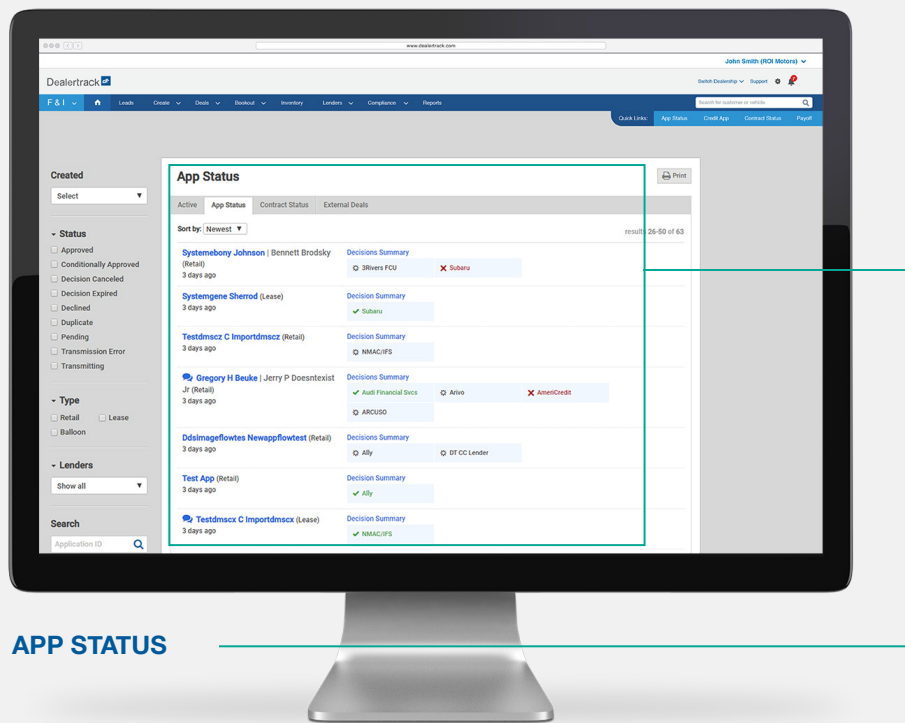
WALK ME THROUGH:

Use the **Walk Me Through** feature when you need additional guidance.

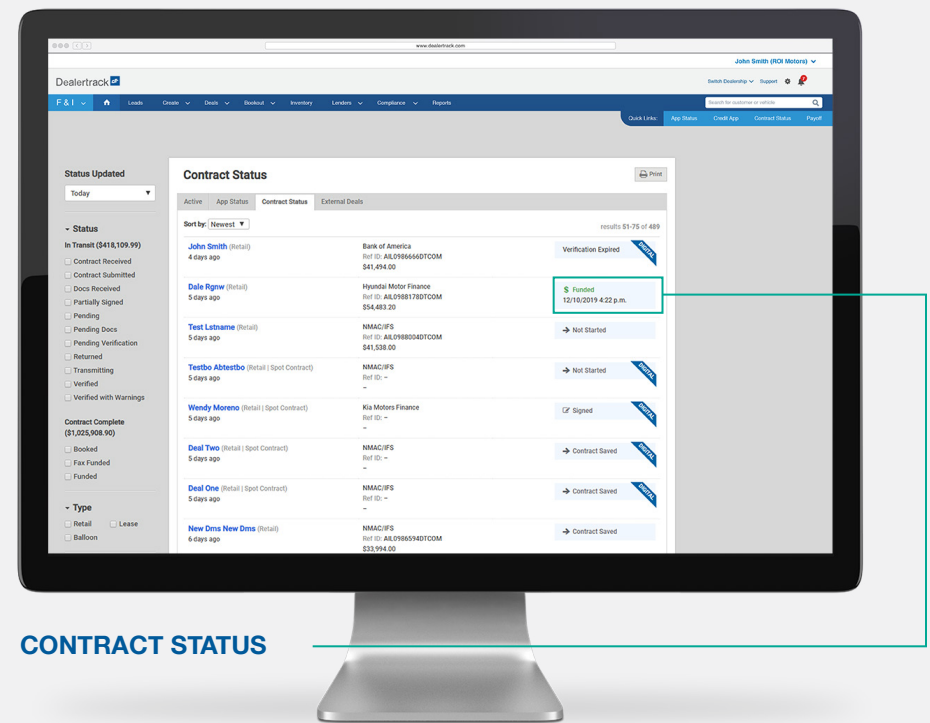
LOCATING & REVIEWING DEAL STATUS



While still on the Deals page, you can easily click on App Status or Contract Status to get a view of where all your deals are in the funding process.



APP STATUS



CONTRACT STATUS

EFFICIENCY INSIDE THE DEAL JACKET



After clicking into a customer name, you enter the deal jacket...

Here, in one centralized location, you can see all the latest activity around the customer.

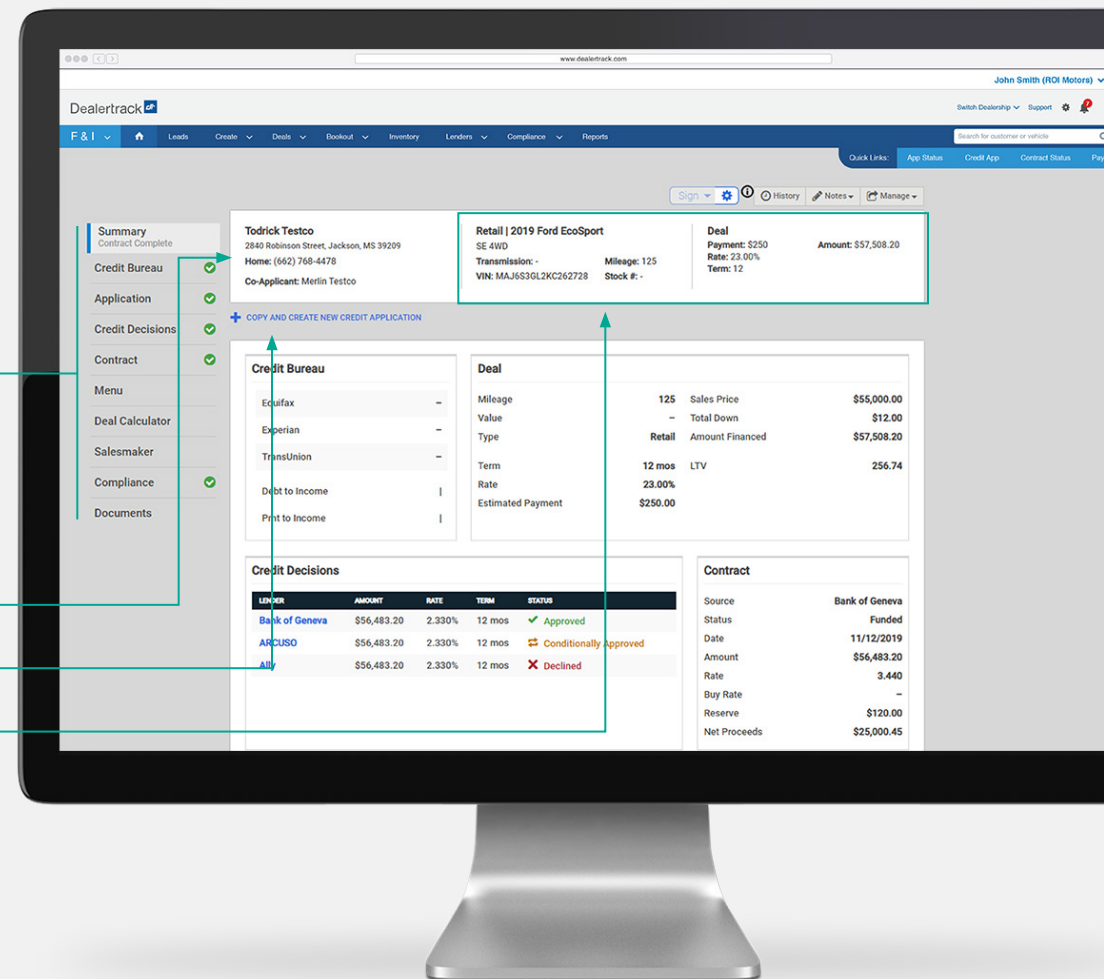
The header section within each deal jacket helps make those everyday credit actions much faster—while also providing a summary of the deal.

EASILY ACCESS OTHER PARTS OF THE DEAL

MAKE CHANGES TO THE APPLICATION

COPY AN APPLICATION

VIEW VEHICLE & DEAL INFORMATION

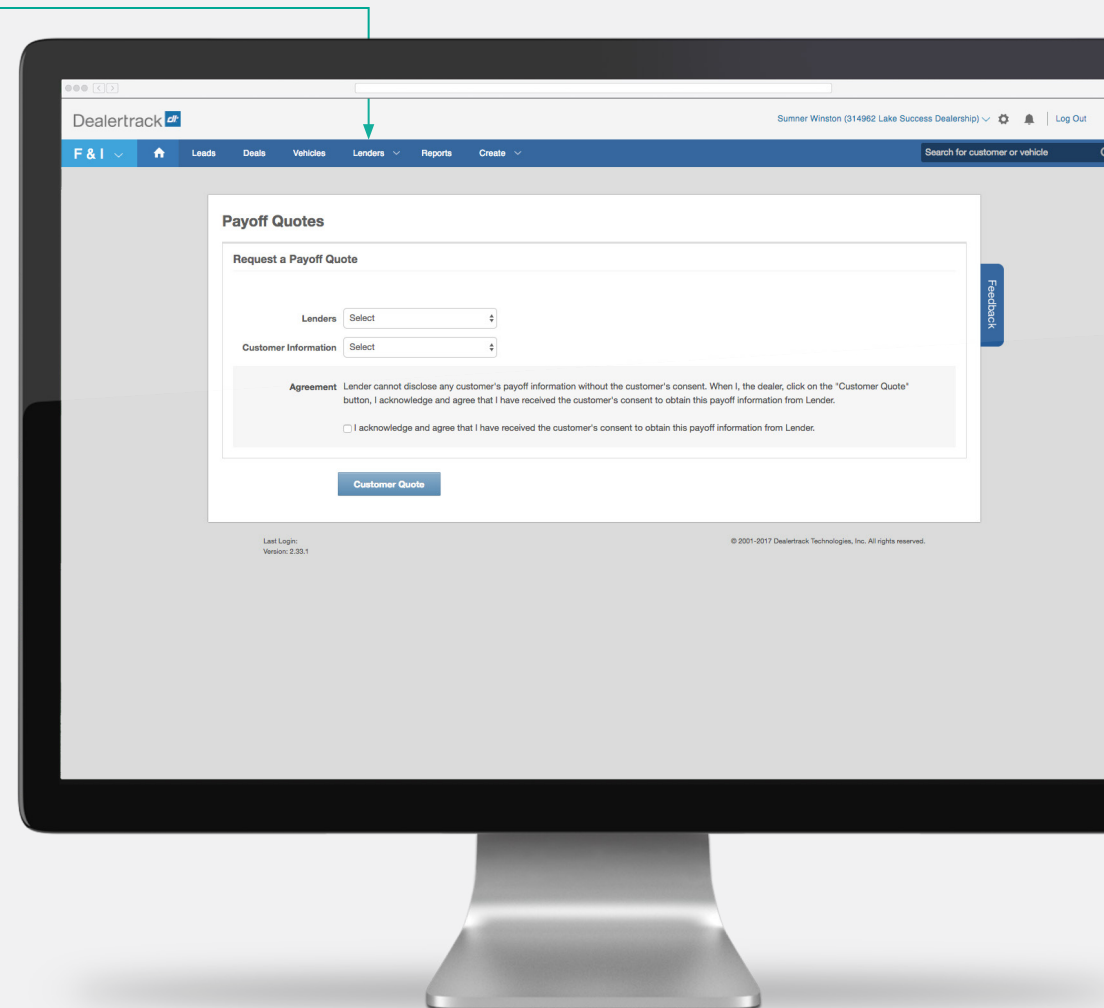


REQUESTING PAYOFF QUOTES

Easily request a payoff quote through Dealertrack.com and receive an accurate payoff amount directly from your lenders.

Click the 'Lenders' tab then click 'Payoff Quotes'.

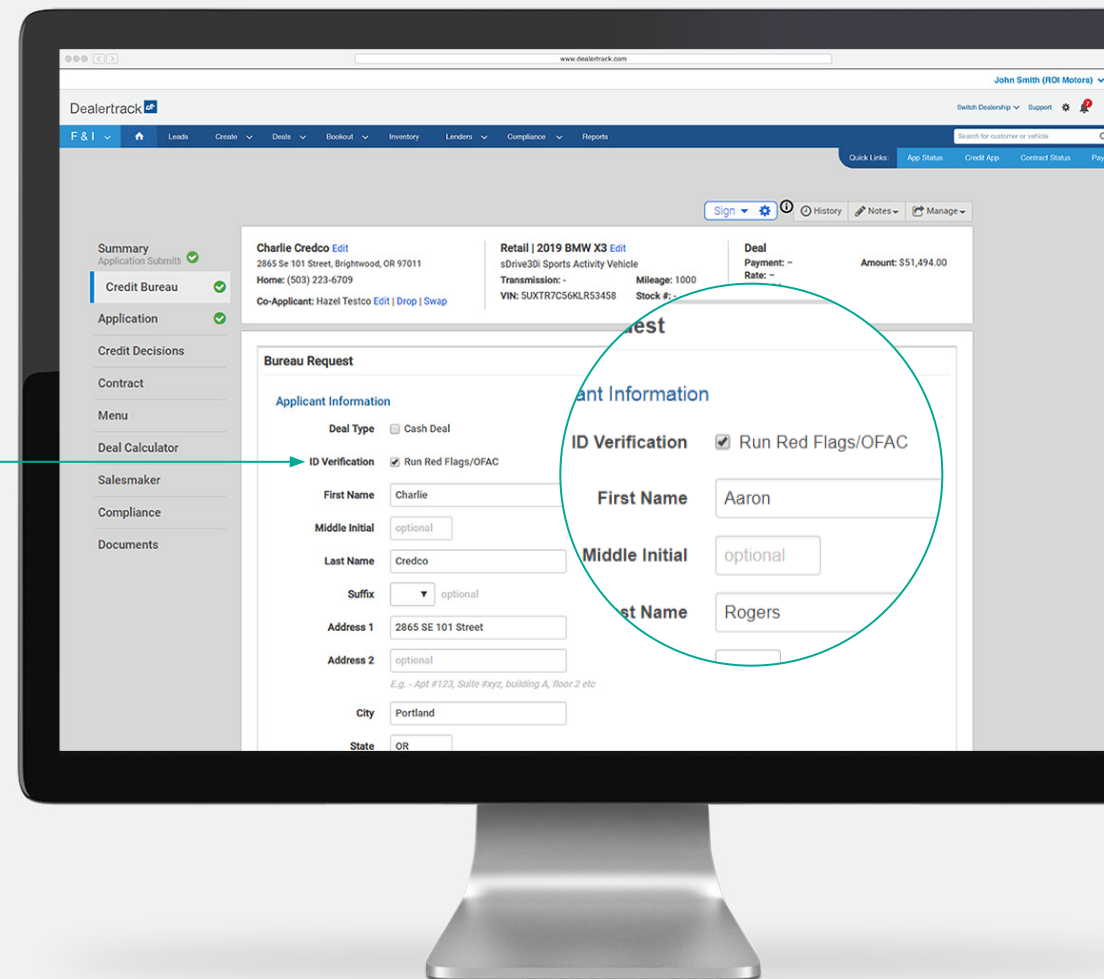
LENDERS



RUNNING COMPLIANCE RED FLAGS/OFAC



Located on the credit bureau request form are integrated check-points — making it easy to comply with Red Flags Rule and OFAC requirements.



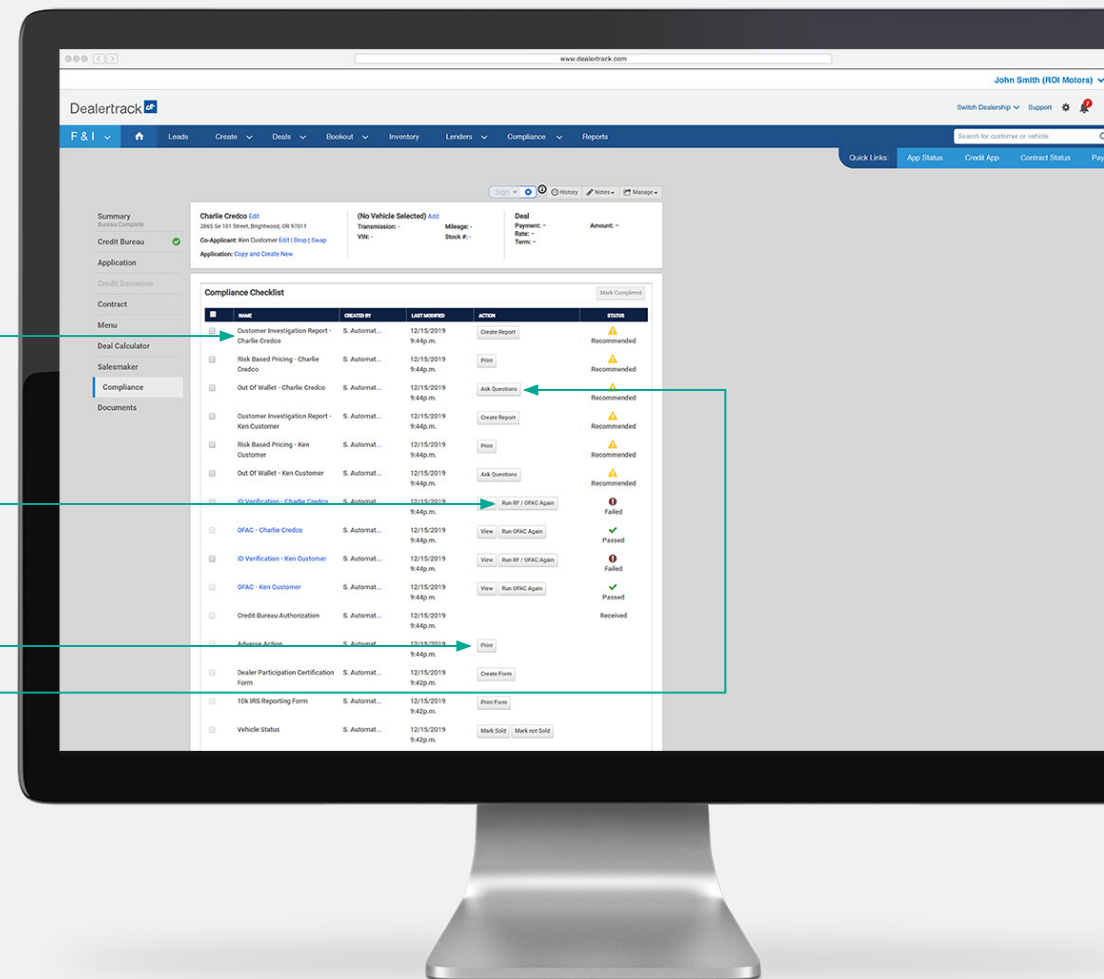
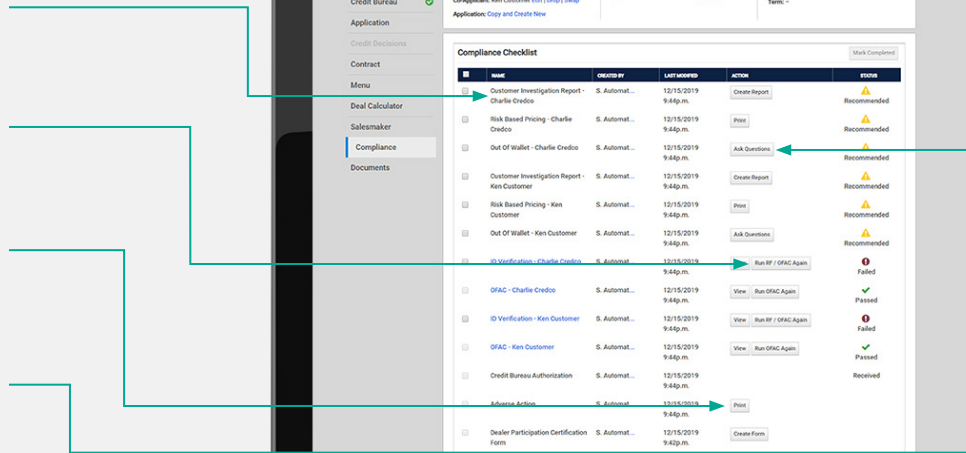
Subscription required.

CHECK OFF COMPLIANCE ACTIONS



With the Compliance Check-List, located on the Compliance tab within the deal jacket, you can:

- Easily view status and take action for compliance to avoid unnecessary penalties
- Verify customer identities allowing you to comply with the Red Flags rule & OFAC
- Quickly identify deals that are candidates for Adverse Action and easily print adverse action notices to provide to your customers
- Verify your applicant's true identify by asking Out of Wallet questions



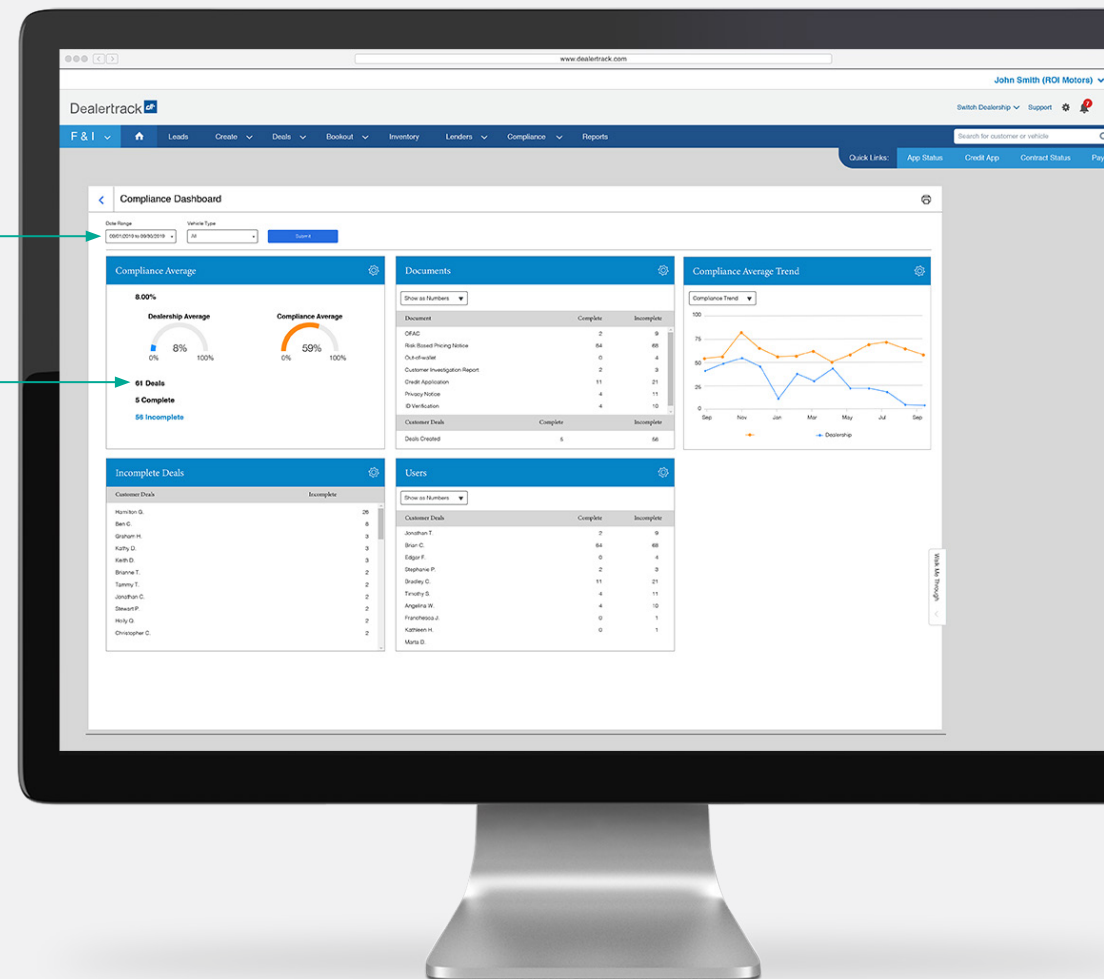
Subscription required.

MONITOR COMPLIANCE ACTIVITY WITH A COMPLIANCE DASHBOARD



Click on Reports in the top navigation bar to access Compliance Dashboards & Reports.

- Filter activity by month and/or vehicle type
- Easily monitor activity with on-demand reports and a comprehensive dashboard allowing for ID Verification and Compliance status of all deals
- Generate reports in PDF and/or Excel

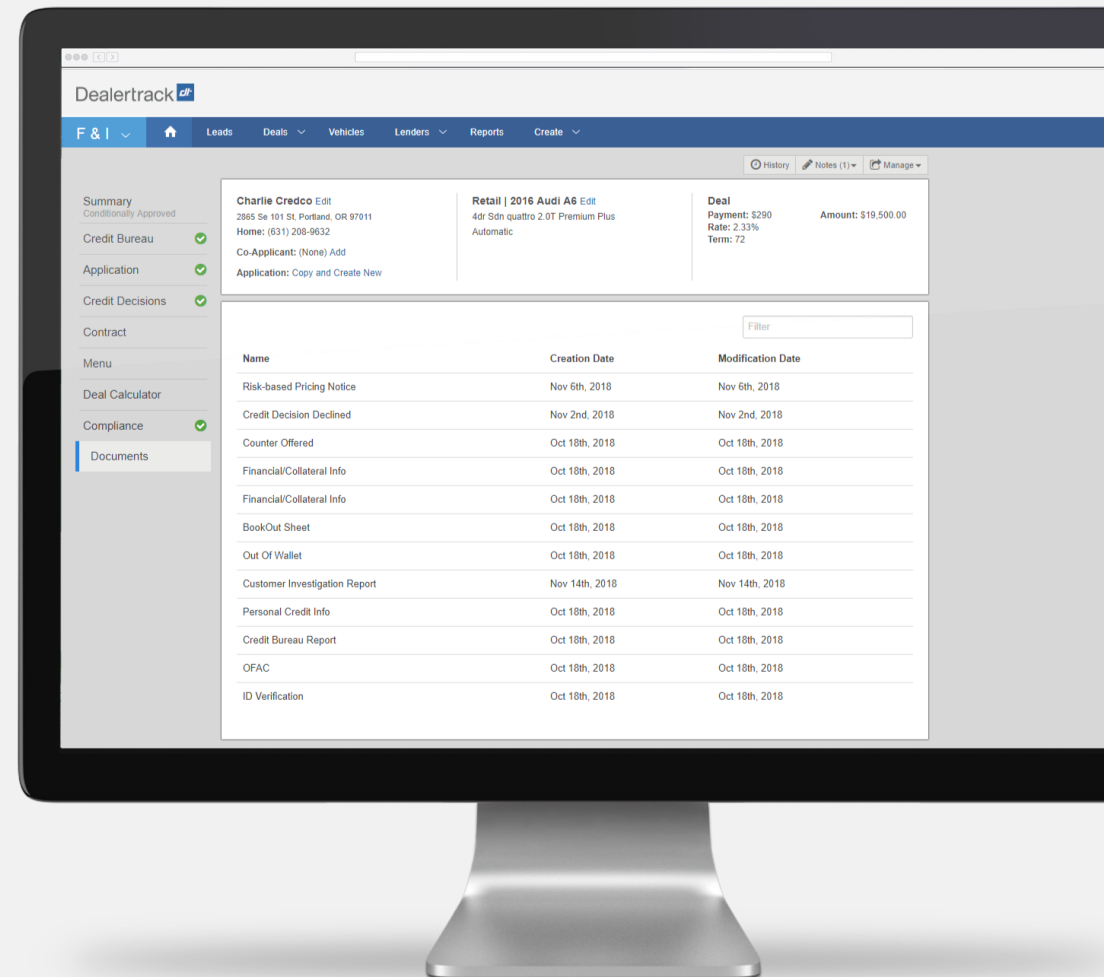


Subscription required.

STORING DOCUMENTS FROM THE DEAL



When subscribed to Dealertrack F&I Compliance, you will have peace of mind that all documents will be saved for up to 10 years in case of an audit.

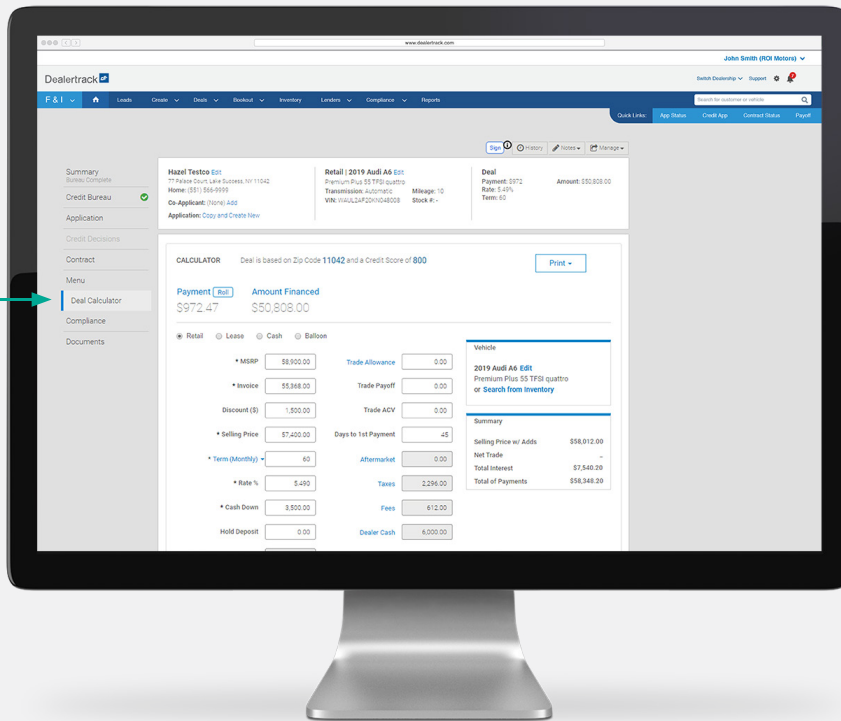


CALCULATE PAYMENTS WITH INTEGRATED DEAL CALCULATOR



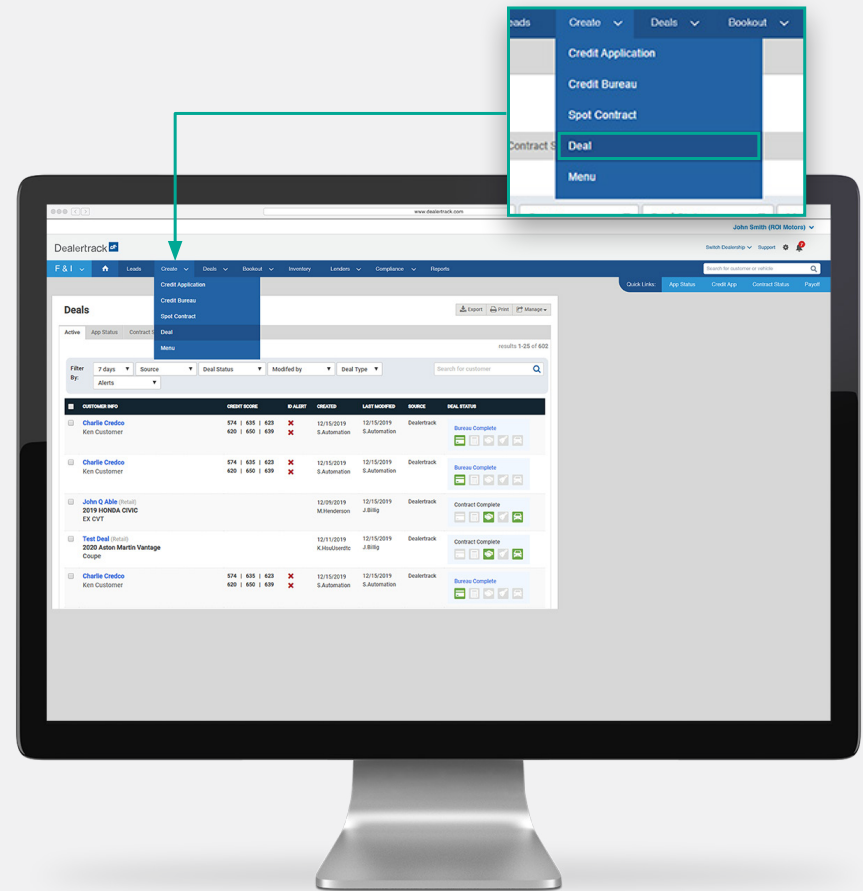
Calculate accurate payments through a fully integrated Deal Calculator with taxes and fees by zip code

Real time access to Aftermarket providers to select and apply product and services in payment calculation

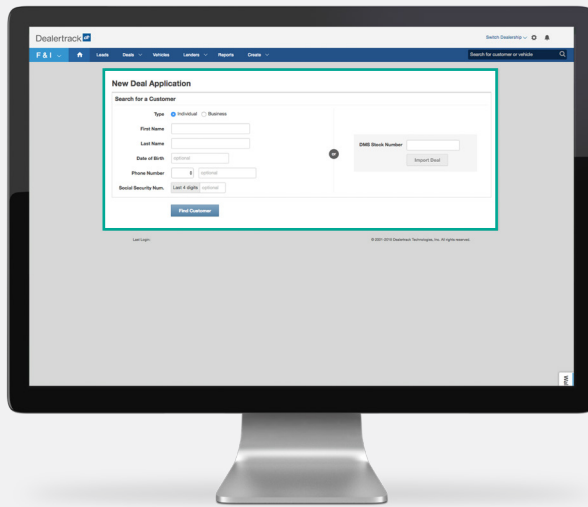


CREATE A NEW DEAL

Click the **Create** tab, then click **Deal**

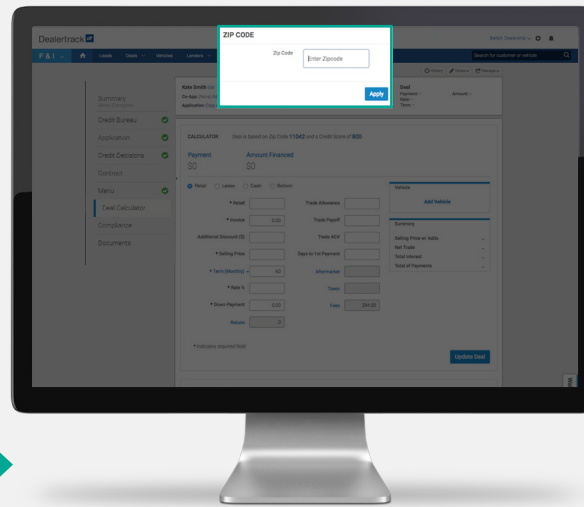


DEAL CALCULATOR



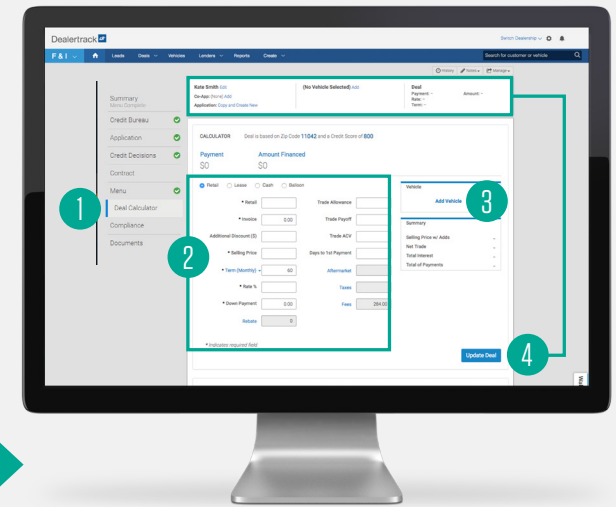
FIND OR CREATE CUSTOMER

Easily search for a customer that is already in your network or create a new customer



ENTER ZIP CODE

By entering the zip code, your payments will be more accurate and your calculations with taxes and fees will be faster



BEGIN CALCULATIONS

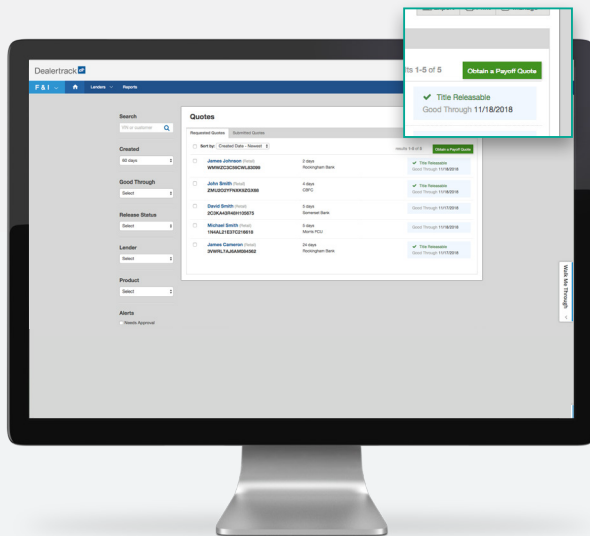
1. You are now brought to the deal calculator screen which is available in each of your customer's deal jacket – located in the Desking tab
2. Enter information about the deal for fast and accurate payments
3. You can add a vehicle – enter VIN# or Stock# to decode vehicle information
4. Click **Update Deal** to update the header section of the customer deal jacket

ACCELERATED TITLE®

Accelerated Title speeds the payoff and title release process to as fast as 4-6 days, expediting the process from weeks to days!*

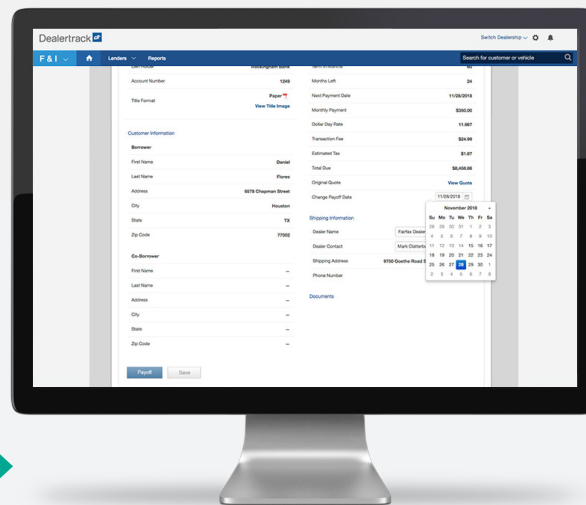


GET YOUR PAYOFF QUOTE



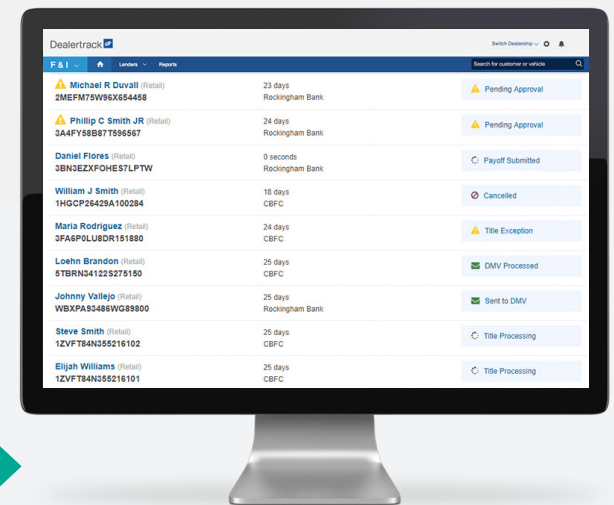
You can search for a saved Payoff Quote, or click the **Obtain a Payoff Quote** button to start a new one. Proceed to enter payoff details.

ACCESS INSIGHTS AND ACCURACY



View full title details electronically and gain unparalleled insights for increased confidence in the deal, as well as receive accurate payoff amounts, based upon the date of your choosing. Click the **Payoff** button to proceed to the payment screen and click **Submit** to complete the Accelerated Title transaction.

24/7 STATUS TRACKING



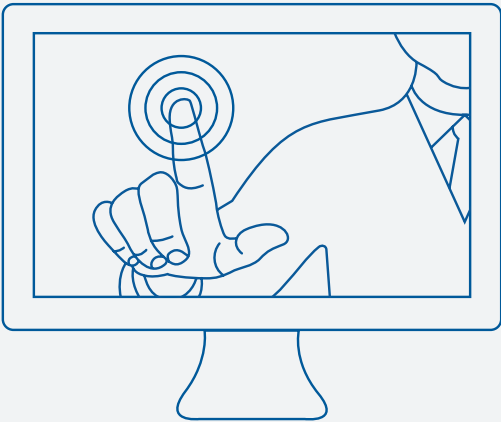
Even after the transaction is complete you have 24/7 visibility and transparency into payment and title status. Know when to expect title delivery, and quickly identify where all trade-ins stand for turnover directly on the platform... without having to call the Lender.

Subscription required.

*Based on average industry timeframe for vehicle title release and vehicle payoff process of 18+ days, as determined by Dealertrack data.

Dealertrack uniFI[®]

EXPERIENCE A FASTER WORKFLOW



INNOVATION THROUGH INTEGRATION

Dealertrack is a leading provider of digital solutions to the automotive retail industry. Our integrated and intuitive approach to products and services makes your workflows more efficient, transparent, and profitable. From Digital Retailing tools that bridge the gap between the online and in-store experience to the largest lender network in North America, we help enable the transformation of auto retailing through a comprehensive solution set spanning DMS, Fixed Operations, Sales and F&I, and Registration and Titling.

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