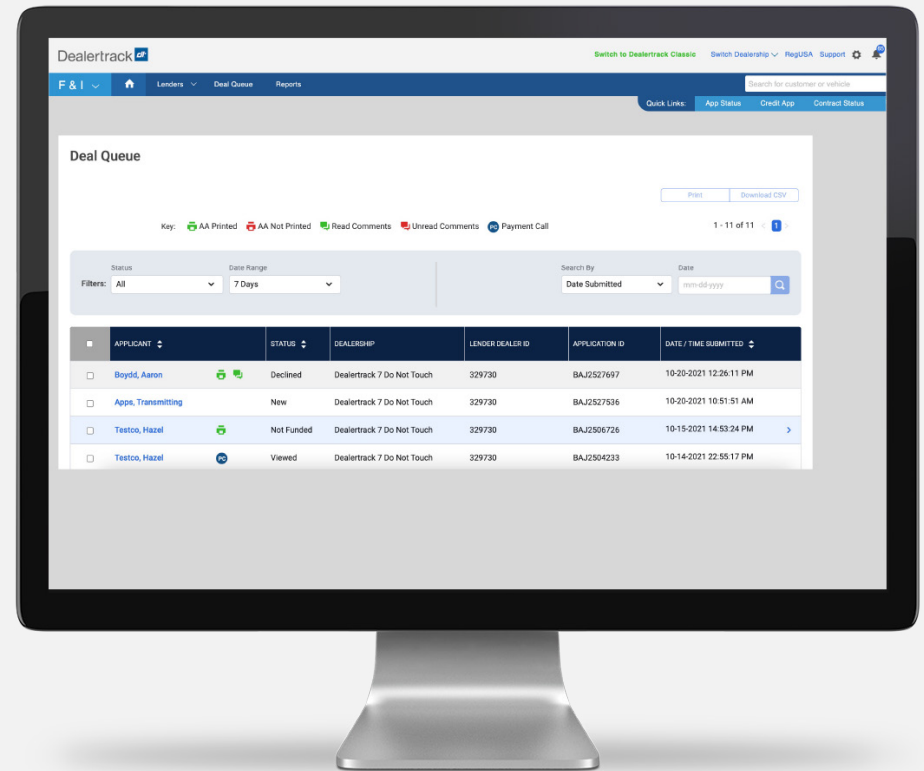


CreditConnection® on Dealertrack uniFI®

Creating Deal Reports

LENDER STEP BY STEP GUIDE

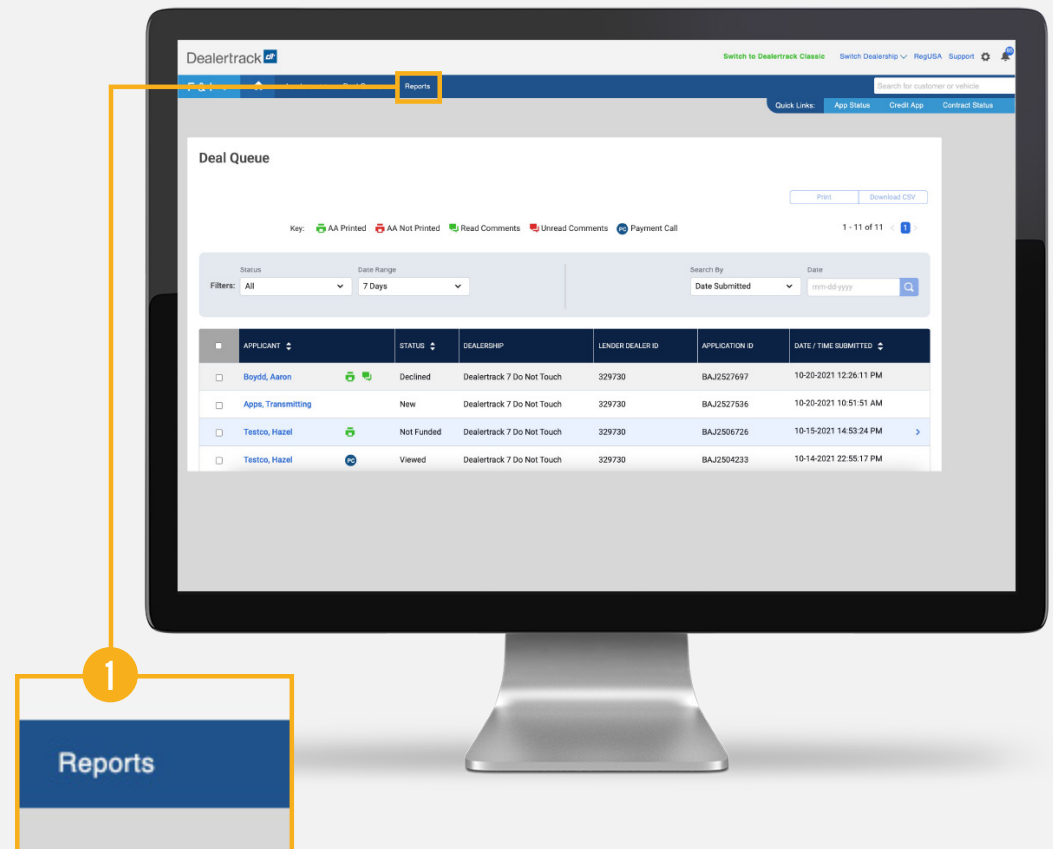


Creating Deal Reports

STEP 1

Select the **Reports** tab from the Dealertrack menu ribbon.

Depending on the tools and solutions you use, you'll see a selection of reports that you may run.

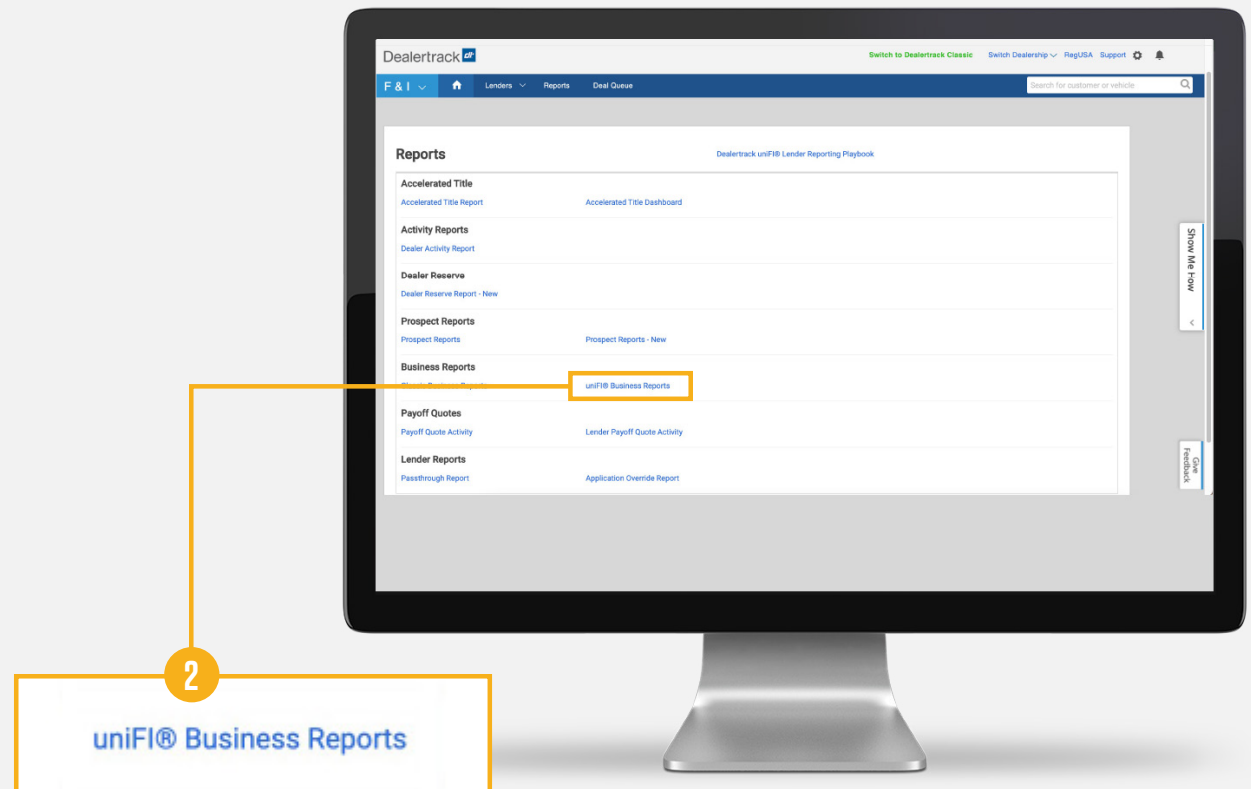


Creating Deal Reports

STEP 2

Select **uniFI® Business Reports**.

Once selected, it will open a new browser window.

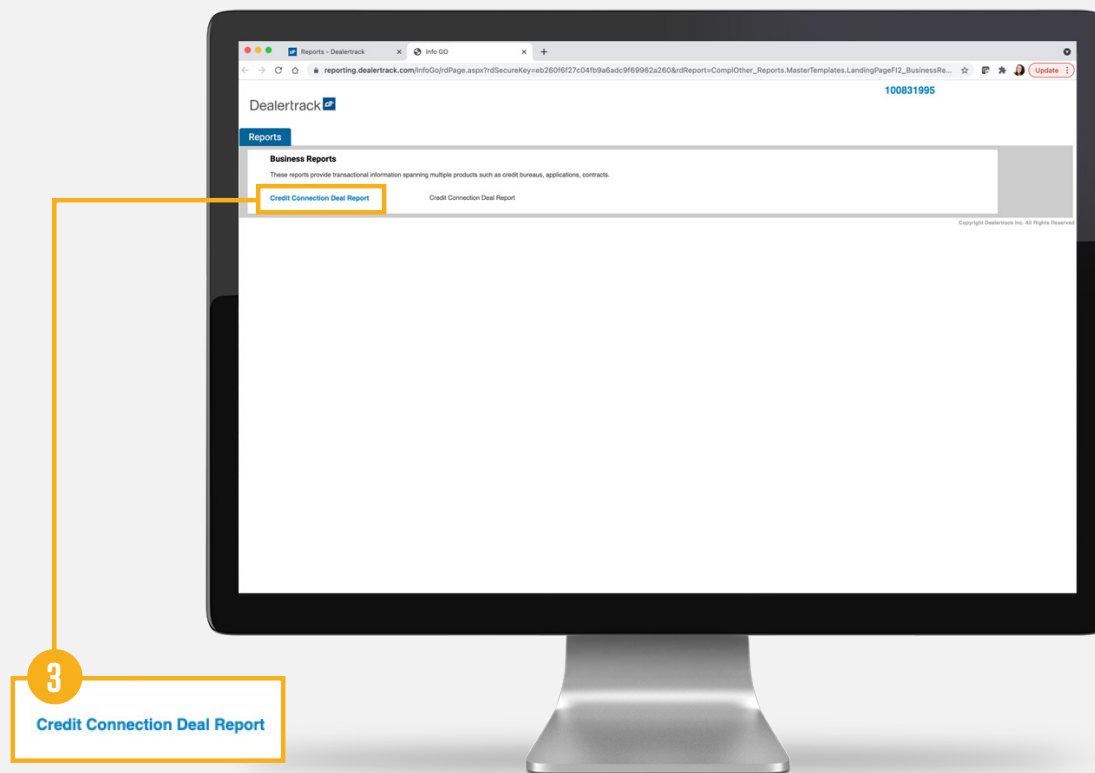


Creating Deal Reports

STEP 3

Select **CreditConnection Deal Report**.

Doing so brings up a **Date Range** dropdown menu.

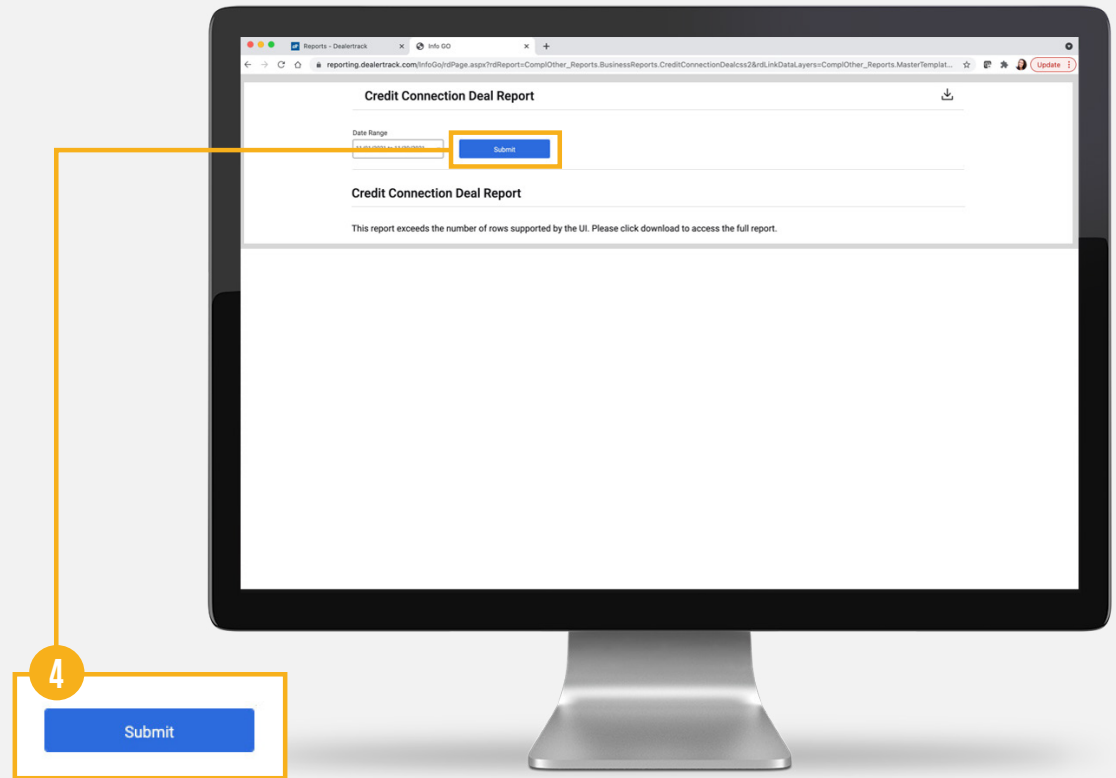


Creating Deal Reports

STEP 4

Choose desired date range.

Choose from the dropdown selection and hit **Submit**. Reporting is available for deals within the last 6 months.

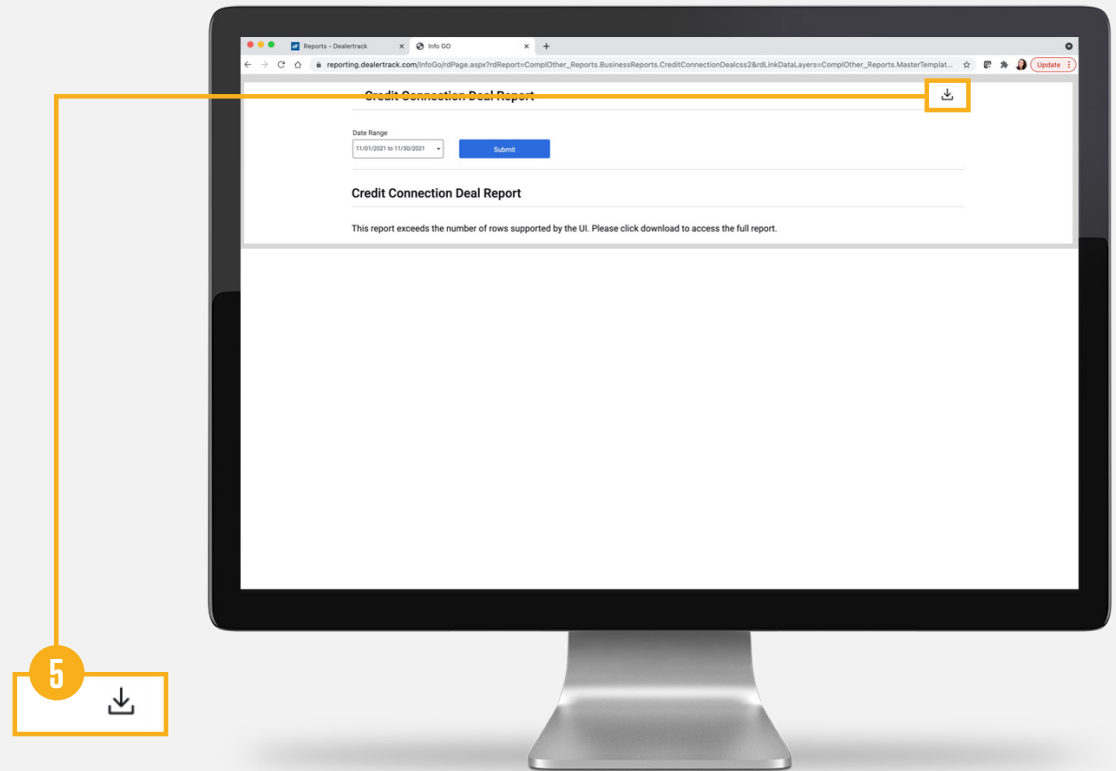


Creating Deal Reports

STEP 5

Download your report.

Once your report has been generated, select the download icon to obtain as a CSV file.



Creating Deal Reports

STEP 6

About your **CSV file**.

Your Deal Report displays all data from the credit application except SSN and Date of Birth from the Applicant and Co-Applicant. It also includes the current decision and funding status.

The screenshot displays a Microsoft Excel spreadsheet with a grid of data. The spreadsheet has a yellow background and a green title bar. The title bar shows the file name: "rdDLj4v2hb3cgeif5fykqprzb32-d9b22c1623e84619ace45bcb6a55d9b5". The spreadsheet has a standard Excel interface with a ribbon at the top containing tabs for Home, Insert, Draw, Page Layout, Formulas, Data, Review, View, and Acrobat. The data table has the following columns: A1 (Branch ID), B (Application), C (Application), D (Product Type), E (Collateral Type), F (Deal Status), G (Create Date), H (Date/Time S), I (Application), J (Update Date), K (Funding Date), L (Payment Cal), M (Adverse Act), N (Dealer ID), O (Dealership N), P (Dealership P), Q (Applicant La), R (Applicant Fir), S (Applicant MI), T (Applicant Ad), U (Applicant Cit). The data rows contain various alphanumeric values, including application numbers like BAK970736, BAK926639, and BAK926641, and dealership names like Cox Motors and Greenholt.

NEED HELP?

Contact our Lender Partner Support Teams

FOR HELP WITH:

- Password resets
- Permissions
- Digital Contracting Choice Group Email setup

Partner Integration Service Desk

Hours of Operation: M – F, 9:00 am – 6:00 pm ET

(866) 868-5900, Option 2

partnerintegrationservicedesk@dealertrack.com

FOR HELP WITH:

- Production questions/inquiries
- Dealertrack uniFI platform troubleshooting

Production Support

Hours of Operation: Available 24/7

(866) 868-5900, Option 1

dtsupport@dealertrack.com