

# CreditConnection® on Dealertrack uniFI® **Creating Deal Reports**

## **LENDER STEP BY STEP GUIDE**

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## **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.



## **STEP 2**

Select uniFI® Business Reports.

Once selected, it will open a new browser window.



## **STEP 3**

Select CreditConnection Deal Report.

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



## **STEP 4**

Choose desired date range.

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



## **STEP 5**

Download your report.

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



## **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.

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## **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 uniFl platform troubleshooting

#### **Production Support**

Hours of Operation: Available 24/7 (866) 868-5900, Option 1 dtsupport@dealertrack.com