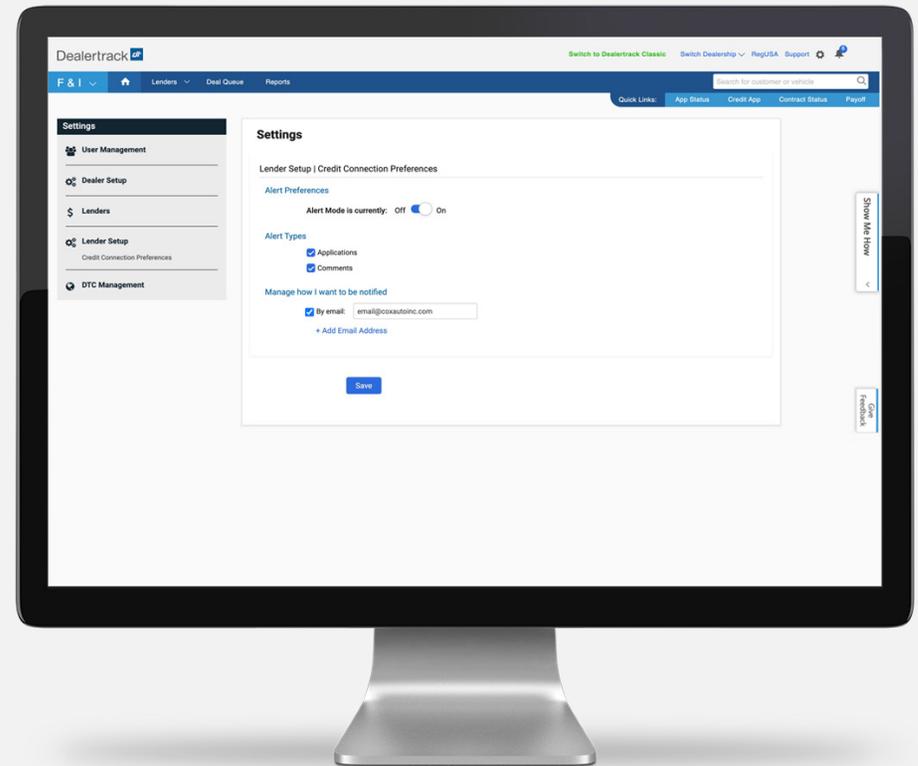


CreditConnection® on Dealertrack uniFI®

Navigating User Preferences and Permissions

LENDER STEP BY STEP GUIDE



Navigating User Preferences and Permissions

CreditConnection PREFERENCES

STEP 1

Select the **Settings** icon to navigate to the Settings menu.

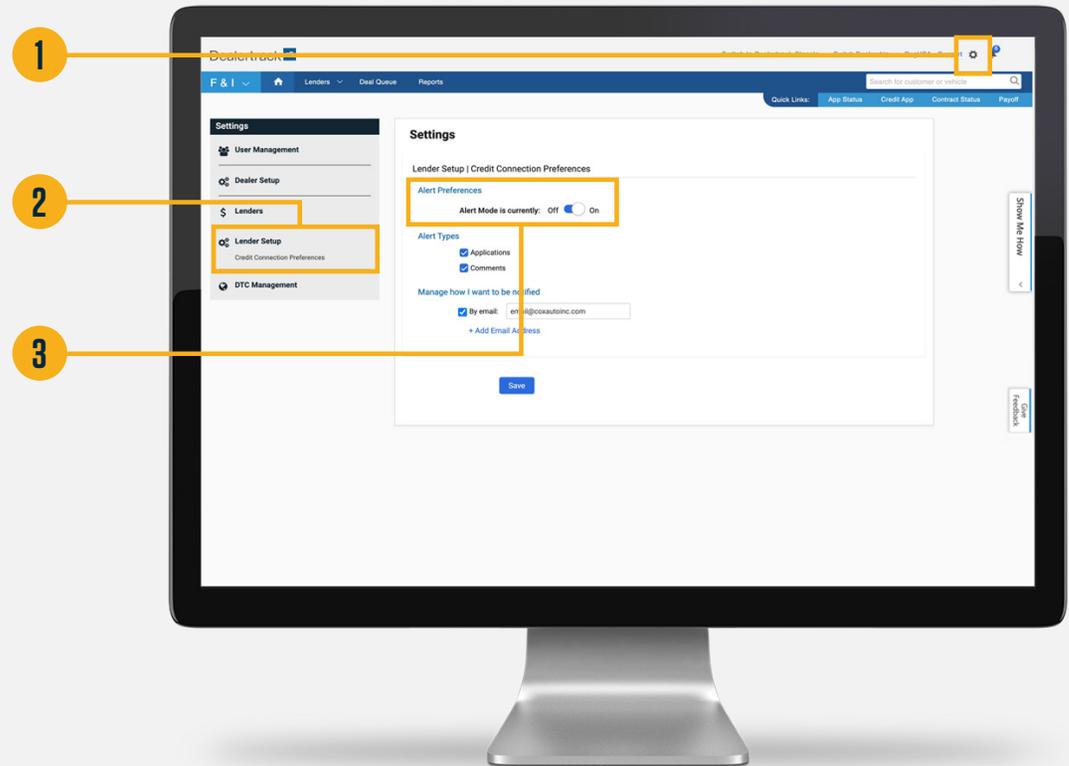
STEP 2

Select **Credit Connection Preferences**.

STEP 3

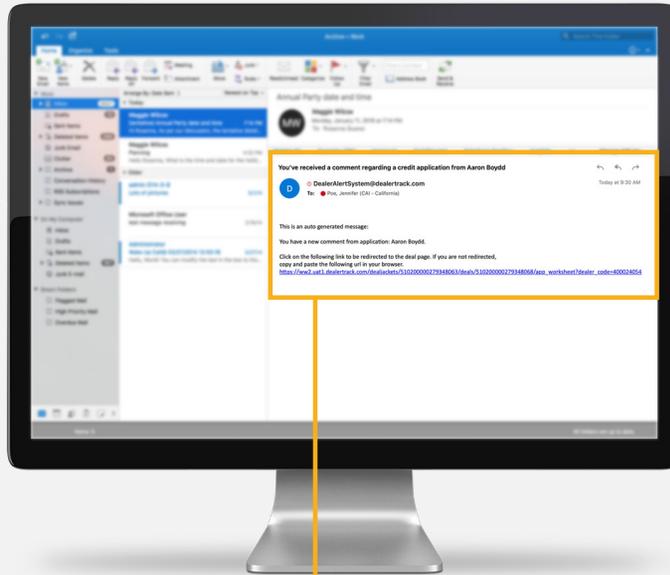
Account administrator may set up **Alert Preferences**.

Note: Only ADMIN lender users will have access to CreditConnection Preferences.



Navigating User Preferences and Permissions

ALERT EMAIL EXAMPLES



1

You've received a comment regarding a credit application from Aaron Boydd

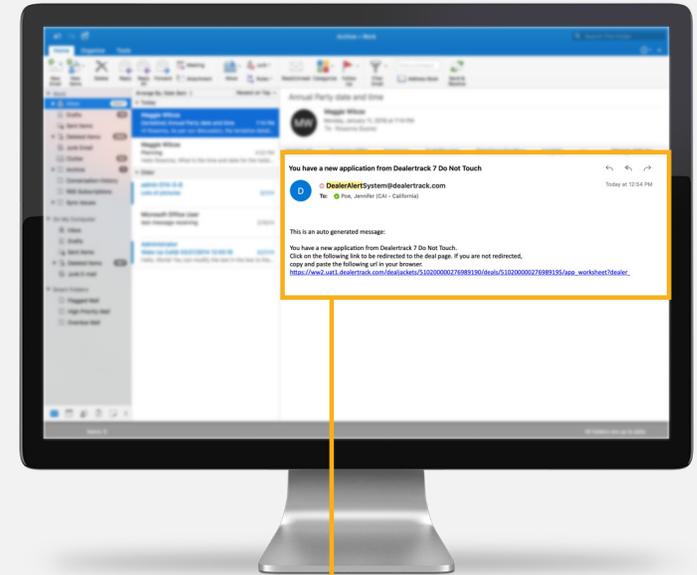
D DealerAlertSystem@dealertrack.com
To: Poe, Jennifer (CAI - California) Today at 9:30 AM

This is an auto generated message:

You have a new comment from application: Aaron Boydd.

Click on the following link to be redirected to the deal page. If you are not redirected, copy and paste the following url in your browser.
https://ww2.uat1.dealertrack.com/deal/jackets/510200000279348063/deals/510200000279348068/app_worksheet?dealer_code=400024054

1
New Comment Alert



2

You have a new application from Dealertrack 7 Do Not Touch

D DealerAlertSystem@dealertrack.com
To: Poe, Jennifer (CAI - California) Today at 12:54 PM

This is an auto generated message:

You have a new application from Dealertrack 7 Do Not Touch.

Click on the following link to be redirected to the deal page. If you are not redirected, copy and paste the following url in your browser.
https://ww2.uat1.dealertrack.com/deal/jackets/510200000276989190/deals/510200000276989195/app_worksheet?dealer_code=400024054

2
New Application Alert

Navigating User Preferences and Permissions

CreditConnection USER PERMISSIONS

The screenshot shows the 'Permissions' configuration page for CreditConnection. It is organized into several sections, each with a list of permissions and checkboxes. Numbered callouts (1-6) point to the following sections:

- 1:** The 'Application' section, which includes 'Application View', 'Application Edit', 'Application Submit', and 'Application Reports'.
- 2:** The 'Credit Bureau' section, which includes 'Credit Bureau View', 'Credit Bureau Edit', and 'Credit Bureau Submit'.
- 3:** The 'Deal Jacket' section, which includes 'Deal Jacket View'.
- 4:** The 'Reports' section, which includes 'User Report', 'Credit Connection Deal Report', 'BookOut by Lender Report', 'Risk Based Pricing Notice Report', 'Exception Report', 'Credit Connection Deal Report', 'BookOut by Lender Exception Report', 'Preselect Summary Report', 'Road Loan Report', 'Payoff Quotes Report', 'Payoff File Error Report', 'Finance Driver Partner Exception Report', 'Passthru Report', 'Payoff Errors Report', 'Dealership Report', 'App Override Report', and 'Dealer Reserve Utilization Report'.
- 5:** The 'Decisions' section, which includes 'Decisions View' and 'Decisions Reports'.
- 6:** The 'Deal Queue' section, which includes 'Deal Queue - Read', 'Deal Queue - Decision', and 'Deal Queue - Funding'.

1
Select accordingly to grant **Application** permissions (View/Edit/Submit/Reports).

2
Select accordingly to grant **Credit Bureau** permissions (View/Edit/Submit).

3
Select to grant **Deal Jacket View** permission.

4
Optional: Select permissions to view various reports.

5
Optional: Select permissions to view **Decisions as a Dealer**.

6
Select accordingly to grant **Deal Queue** permissions (Read/Decision/Funding).

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