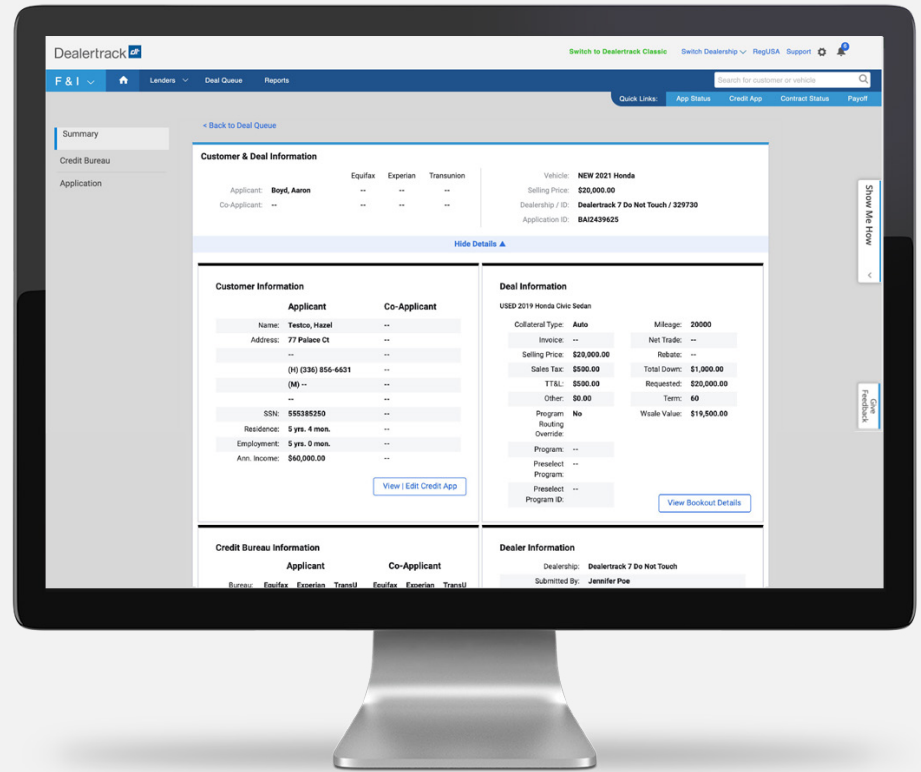


CreditConnection® on Dealertrack uniFI®

Navigating the Worksheet

LENDER USER GUIDE



Navigating the Worksheet

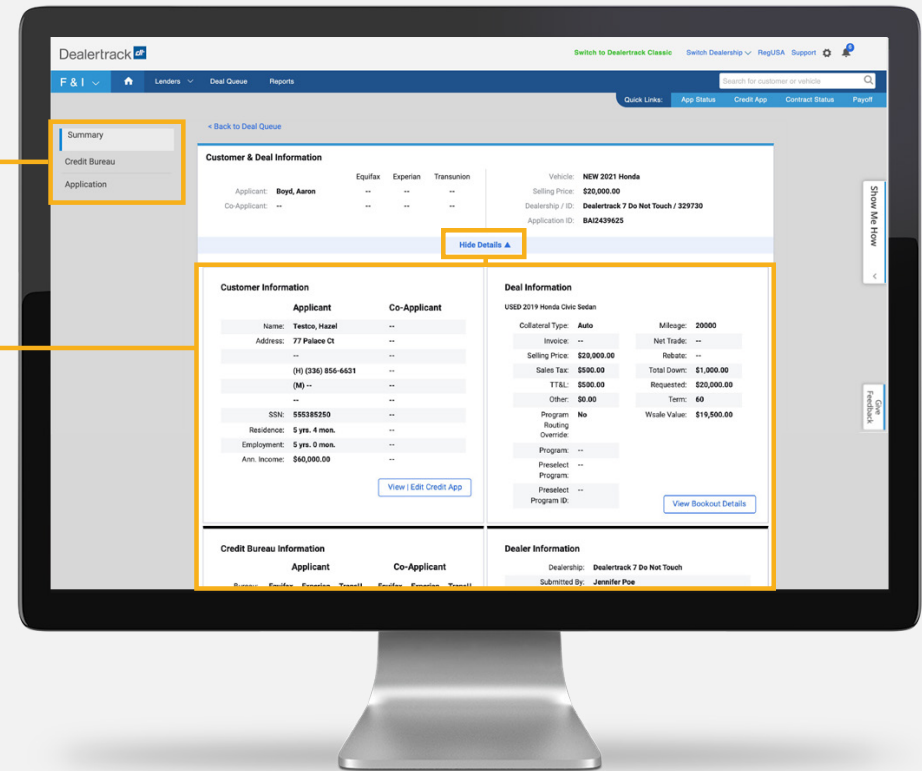
WORKSHEET NAVIGATION

1

Within the worksheet, you can navigate to Summary, Credit Bureau, and Application.

2

Summary header displays Customer & Deal Information. Select **Hide Details** to minimize the details.



Note: If an application was not decided, the application status in the Deal Queue will now display Viewed.

Navigating the Worksheet

WORKSHEET DETAILS

3

Full SSN will display when the worksheet is initially viewed (Status: New). After initial view, the SSN will be masked.

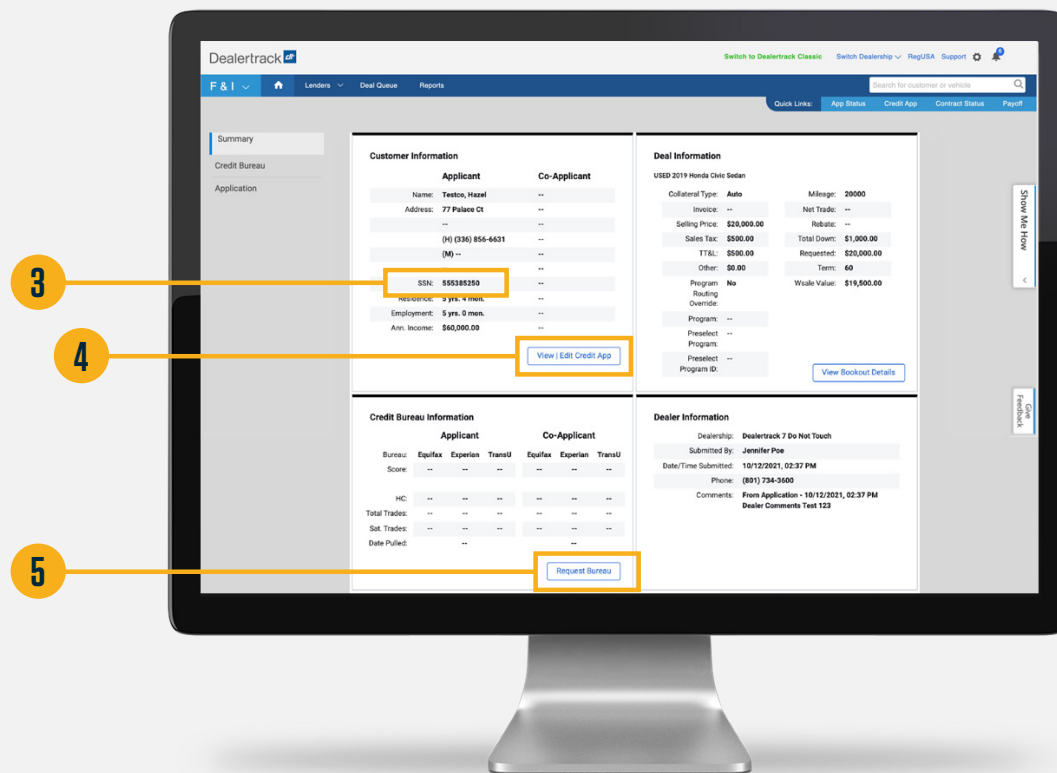
4

To view all customer information (including full SSN) and deal information, select **View/Edit Credit App.**

Note: See page 5 for detailed instruction on viewing, editing, and printing the credit application.

5

To run credit bureau information, select **Request Bureau.**



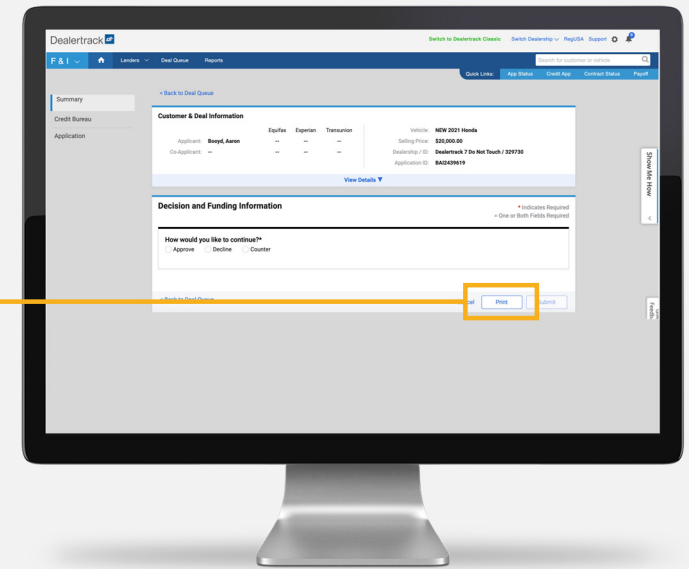
Navigating the Worksheet

PRINT WORKSHEET

6

Click the **Print** button at the bottom of the worksheet to print the worksheet as a PDF.

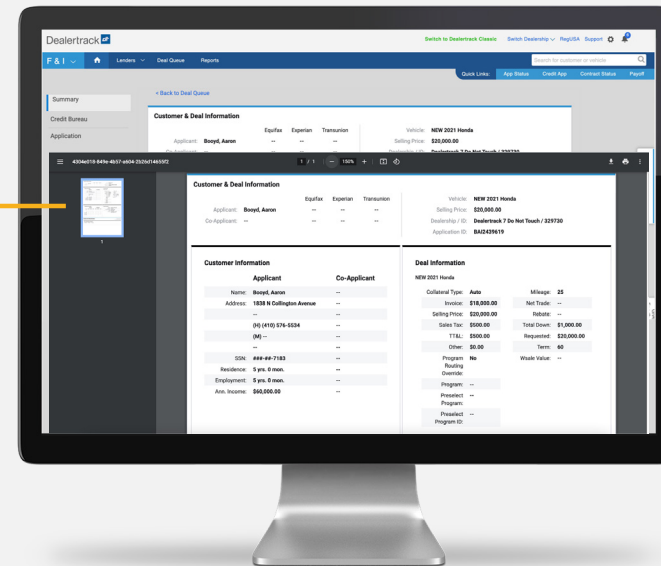
6



7

A new browser tab will open and will display a PDF of the worksheet.

7



Navigating the Worksheet

VIEW/EDIT/PRINT CREDIT APPLICATION

1

Application is highlighted on the navigation menu, indicating the user now is able to view, edit and print the credit application. To view all sensitive customer information, you will need to print the application.

2

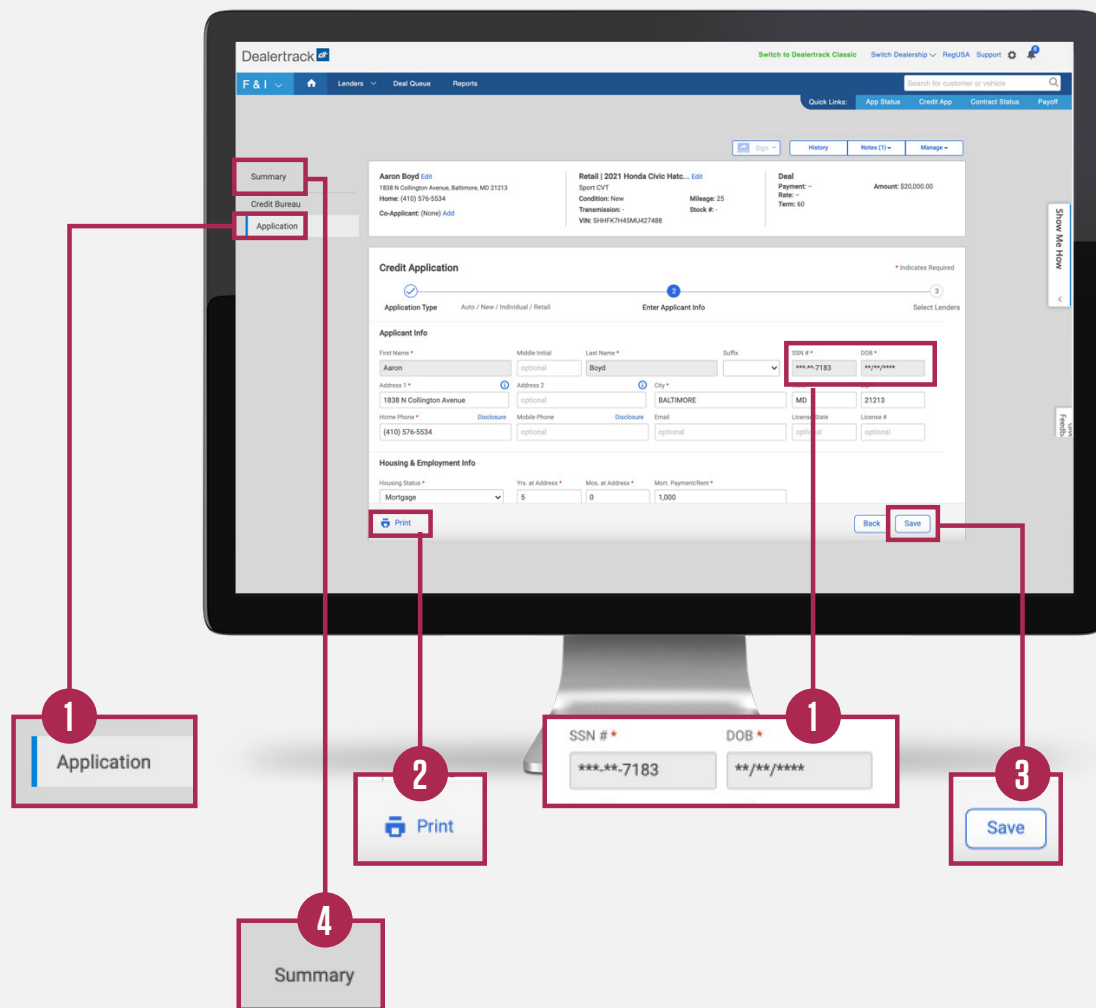
Select **Print** to view the complete credit application as a PDF. [Reference Page 9 — Print Credit Application PDF Example](#)

3

If required, changes can be applied to the editable fields on the credit application, then select **Save**.

4

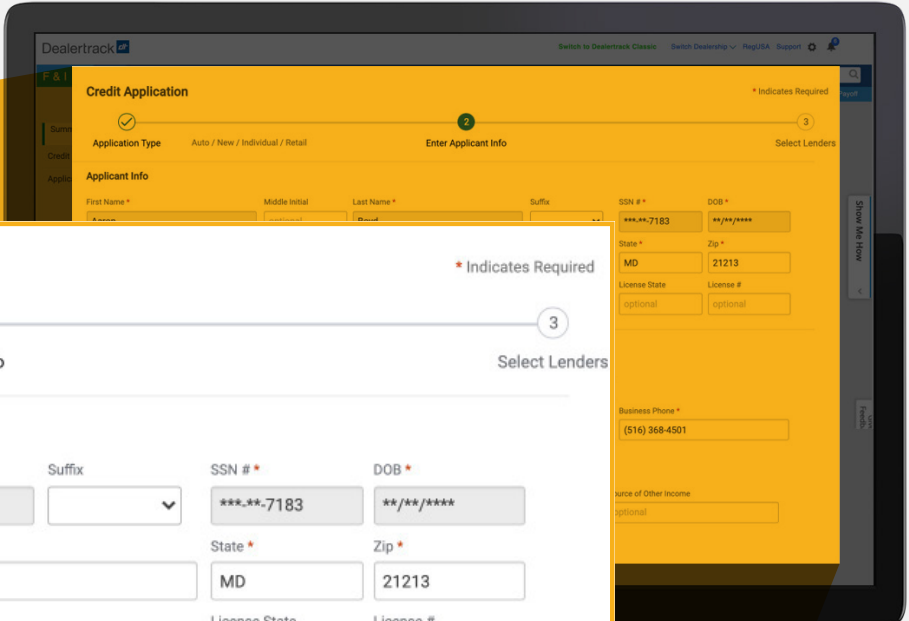
Select **Summary** to return to worksheet.



Note: Changes to the application only display for the lender copy of the application, not the dealer's copy.

Navigating the Worksheet

APPLICANT INFORMATION EXAMPLE



The image shows a screenshot of the Dealertrack Credit Application form, specifically the 'Enter Applicant Info' step. The form is displayed on a tablet and a larger desktop view. The desktop view is highlighted with a yellow background. The form is titled 'Credit Application' and has a progress bar with three steps: 1. Application Type (checked), 2. Enter Applicant Info (current step), and 3. Select Lenders. The 'Applicant Info' section includes fields for First Name (Aaron), Middle Initial (optional), Last Name (Boyd), Suffix (dropdown), SSN (***-**-7183), and DOB (**/**/****). Address fields include Address 1 (1838 N Collington Avenue), Address 2 (optional), and City (BALTIMORE). Contact information includes Home Phone ((410) 576-5534), Mobile Phone (optional), and Email (optional). License information includes License State (optional) and License # (optional). The 'Housing & Employment Info' section includes Housing Status (Mortgage), Yrs. at Address (5), Mos. at Address (0), and Mort. Payment/Rent (1,000). Employment Status (Employed), Employer (Cox Auto Inc), Yrs. at Employer (5), Mos. at Employer (0), and Business Phone ((516) 368-4501) are also included. Other Monthly Income is 5,000 with a Monthly salary type. A section for 'Other Monthly Income' includes Other Income (optional) and Source of Other Income (optional). A disclaimer is provided at the bottom of the form.

Credit Application * Indicates Required

Application Type: Auto / New / Individual / Retail

Enter Applicant Info

Select Lenders

Applicant Info

First Name * Middle Initial Last Name * Suffix

SSN # * DOB *

Address 1 * Address 2 City *

State * Zip *

Home Phone * Disclosure Mobile Phone Disclosure Email

License State License #

Housing & Employment Info

Housing Status * Yrs. at Address * Mos. at Address * Mort. Payment/Rent *

Employment Status * Employer * Yrs. at Employer * Mos. at Employer * Business Phone *

Occupation Gross Salary * Salary Type *

Other Monthly Income

Other Income Source of Other Income

In accordance with the General Terms and Conditions, you are required to read the following statement to the applicant before you can request from the applicant the amount, if any, of "Other Income" and the "Source of Other Income". *Alimony, child support, or separate maintenance income need not be disclosed if you do not wish to have it considered as a basis for repaying this obligation.*

Navigating the Worksheet

HOUSING & EMPLOYMENT / VEHICLE INFORMATION EXAMPLE

Housing & Employment Info

Housing Status *
Mortgage

Yrs. at Address * 5
Mos. at Address * 0
Mort. Payment/Rent * 1,000

Employment Status *
Employed

Employer * Cox Auto Inc
Yrs. at Employer * 5
Mos. at Employer * 0
Business Phone * (516) 368-4501

Occupation optional
Gross Salary * 5,000
Salary Type * Monthly

Other Monthly Income
In accordance with the General Terms and Conditions, you are required to read the following statement to the applicant before you can request from the applicant the amount, if any, of "Other Income" and the "Source of Other Income". *Alimony, child support, or separate maintenance income need not be disclosed if you do not wish to have it considered as a basis for repaying this obligation.*

Other Income optional
Source of Other Income optional

Vehicle & Financial Info

Vehicle Info Payment Call Yes No

Stock Number optional
VIN SHHFK7H45MU427488
Vehicle Year * 2021 [Type in vehicle info](#)

Vehicle Make * Honda
Vehicle Model * Civic Hatchback
Vehicle Trim * Sport CVT

Invoice * 18,000.00
Odometer * 25
MSRP 25,000.00

Trade-In Add a trade-in? Yes No

Lien Holder optional

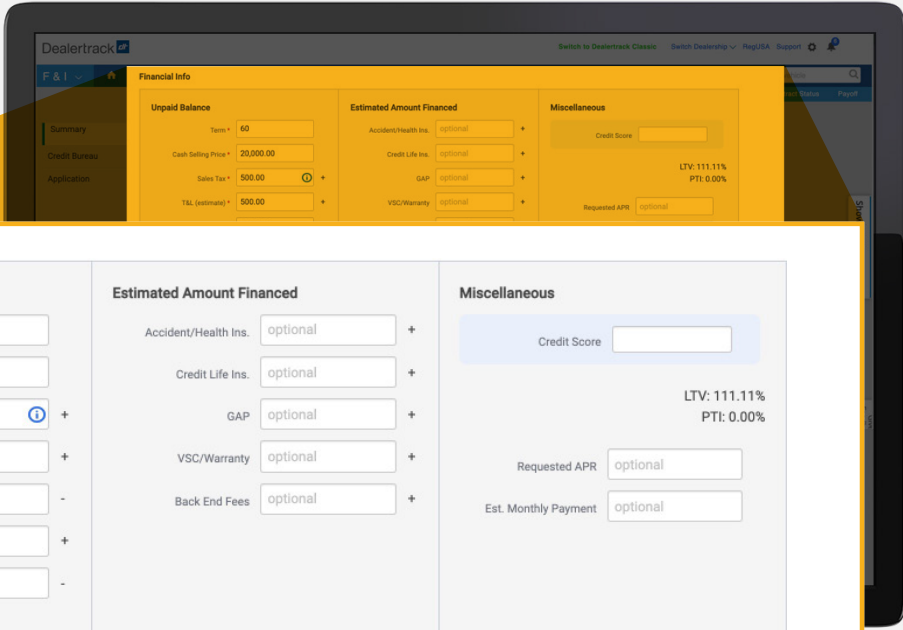
Monthly Payment optional

Year *
Make *
Model *
Trim *
[Type in vehicle info](#)

Navigating the Worksheet

FINANCIAL INFORMATION EXAMPLE

Note: LTV Calculation (New) and if an Estimate payment amount is entered, a PTI Calculation will display (New).



Financial Info

Unpaid Balance	Estimated Amount Financed	Miscellaneous
Term * 60	Accident/Health Ins. optional +	Credit Score <input type="text"/>
Cash Selling Price * 20,000.00	Credit Life Ins. optional +	LTV: 111.11% PTI: 0.00%
Sales Tax * 500.00 +	GAP optional +	Requested APR optional
T&L (estimate) * 500.00 +	VSC/Warranty optional +	Est. Monthly Payment optional
Cash Down 1,000.00 -	Back End Fees optional +	
Front End Fees optional +		
Rebate(s) optional -		
Total: \$20,000.00	Total \$20,000.00	

[Clear All Vehicle & Financial Data](#)

Disclosures & Signing

When I, the dealer, select the "Submit This Application" to send this application to the financial institutions selected, I acknowledge and agree that:(i) either I provided a printed copy of the disclosures to the Applicant(s) or read the disclosures to the Applicant(s) verbatim and that the Applicant(s) agreed to the disclosures, and (ii) the Applicant(s) agreed that I may submit this application to all selected financial institutions. [View Disclosure](#)

Additional Comments

Dealer App Comments Test

560 characters

[Print](#) [Back](#) [Save](#)

PRINT CREDIT APPLICATION PDF EXAMPLE

The image shows a digital credit application form titled "Dealer Name: CC UniFI Training" and "Dealer Phone #: 516-302-1234". The form is displayed in a browser window, with a zoomed-in view of the form content overlaid on top. The browser interface shows the URL "dtrcom_individual_credit_app_without_js_blank.pdf", page number "1 / 3", and zoom level "100%".

Dealer Name: CC UniFI Training Dealer Phone #: 516-302-1234
Dealer Fax #: --

PLEASE PRINT - INCOMPLETE APPLICATIONS WILL NOT BE PROCESSED.

INSTRUCTIONS:
You may apply for credit in your name alone, whether or not you are married.
(1) Please indicate whether you are applying for Individual Credit Joint Credit Community Property State Business Application
(2) If you are applying for individual credit in your name and relying on your own income or assets and not the income or assets of another person as the basis of repayment of the credit requested, complete only Section A.
(3) If you are applying for joint credit with another person, complete sections A and B. We intend to apply for joint credit.

Applicant _____ Co-Applicant _____
* If you are married and live in a community property state, please complete Section A about yourself and Section B about your spouse. You must sign this application. Your spouse must sign this application only if s/he wishes to be a Co-Applicant.

A. APPLICANT INFORMATION

Last Name	First Name	Middle Initial	Social Security Number	Birth Date
Boyd	Aaron		669-02-7183	08/28/1956
Address		Apt # / Suite #	P.O. Box	Rural Route
1838 N Collington Avenue				
City		State	Zip	
BALTIMORE		MD	21213	
Home Phone	Cell Phone	Residential Status	Time at Address	Rent/Mgt. Pmt. \$
(410)576-5534		<input checked="" type="checkbox"/> Homeowner <input type="checkbox"/> Rent <input type="checkbox"/> Family <input type="checkbox"/> Other	5 Yrs. ___ Mos.	1000.00
E-Mail Address		Driver's License No.	Driver's License State	Time at Previous Address
				___ Yrs. ___ Mos.
Previous Full Address (if less than 2 years)		Apt # / Suite #	P.O. Box	Rural Route
City		State	Zip	
Employer Name		Employment Type		
Cox Auto Inc		<input checked="" type="checkbox"/> Employed <input type="checkbox"/> Unemployed <input type="checkbox"/> Self-employed <input type="checkbox"/> Military <input type="checkbox"/> Retired <input type="checkbox"/> Student <input type="checkbox"/> Other		
Salary	Salary Type	Occupation	Length of Employment	Work Phone Number *
5000	<input type="checkbox"/> Weekly <input type="checkbox"/> Bi-Weekly <input checked="" type="checkbox"/> Monthly <input type="checkbox"/> Annually		5 Yrs. ___ Mos.	(516)368-4501
Previous Employer Name		Previous Employment Type		
		<input type="checkbox"/> Employed <input type="checkbox"/> Unemployed <input type="checkbox"/> Self-employed <input type="checkbox"/> Military <input type="checkbox"/> Retired <input type="checkbox"/> Student <input type="checkbox"/> Other		
Previous Occupation		Length of Employment	Previous Work Phone Number	
		Yrs. ___ Mos.		
Alimony, child support, or separate maintenance income need not be revealed if you do not choose to have it considered as a basis for repaying this obligation.				
Other Income (Monthly)		Source of Other Income	By Signing, you certify that the income entered on this Credit Application is accurate.	
			<input checked="" type="checkbox"/>	
Comments				
Dealer App Comments Test				

AGREEMENT

The words "we," "us," "our" and "ours" as used below refer to us, the dealer, and to the financial institution(s) selected to receive your application. You understand and agree that you are applying for credit by providing the information to complete and submit this credit application. We may keep this application and any other application submitted to us and information about you whether or not the application is approved. You certify that the information on the application and in any other application submitted to us, is true and complete. You understand that false statements may subject you to criminal penalties. The words "you," "your" and "yours" mean each person submitting this application. You authorize us to submit this application and any other application submitted in connection with the proposed transaction to the financial institutions disclosed to you by us the dealers; in addition, in accordance with the Fair Credit Reporting Act, you authorize that such financial institutions may submit your applications to other financial institutions for the purpose of fulfilling your request to apply for credit. This application will be reviewed by the dealer and such financial institutions.

You agree that we may obtain a consumer credit report periodically from one or more consumer reporting agencies (credit bureaus) in connection with the proposed transaction and any update, renewal, refinancing, modification or extension of that transaction. You also agree that we or any affiliate of ours may obtain one or more consumer credit reports on you at any time during the term of your financing. If you ask, you will be told whether a credit report was requested, and if so, the name and address of any credit bureau from which we or our affiliate obtained your credit report. You agree that the dealer and the financial institutions may verify your employment, pay, assets and debts, and that anyone receiving a copy of this is authorized to provide such dealer and financial institutions with such information. You further authorize the dealer and the financial institutions to gather whatever credit and employment history

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