

# CreditConnection® on Dealertrack uniFI® Navigating the Worksheet

# **LENDER USER GUIDE**

Summary         Center & Deal Information         Equitar         Equitar         Transmitter         Vertice         Number of the Deal Information         Vertice         Summary           Centor & Deal Information         Equitar         Equitar         Equitar         Transmitter         Vertice         State Tobel	F&l∨ ♠ Len	ers 🗸 Deal Queue Rep	iorts						Search for cut	istomer or vehicle	C
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Credit Bureau         Conterner & Deal Information         Equity to prove the provide the maximum of the provide the provid	Summary	< Back to Deal Queue									
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Application         Application         Bigs Agence	Application		E	quifax Experia	in Transunion	Vehicle	NEW 2021 Ho	onda			
Ox. Applicate:       -	Application	Applicant: B	oyd, Aaron		-	Selling Price	\$20,000.00				
Applicant Co-Applicant           Applicant To:         Deal Information           Applicant Co-Applicant         USB 2019 Hould Citle Steam           Notres: Tables (Ct                0(0 (201) 85-4631            0(0		Co-Applicant:				Dealership / ID	Dealertrack 7	Do Not Touch / 325	9730		
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COX AUTOMOTIVE

### **WORKSHEET NAVIGATION**

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





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



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

# **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.

#### Dealertrack 2 ship 🗸 RegUSA Support 😋 🧬 ٠ Summary Deal Information Credit Bureau Co-Applican USED 2019 Honda Civic Se Applicant Applicatio Testco, Hazel Collateral Type: Auto iress: 77 Palace Ct alling Price: \$20,00 (1) (226) 856-662 Sales Tax: \$500.00 tal Down: \$1 000.00 (M) --TT&L: \$500.00 equested: \$20,000.00 Other: \$0.00 3 SSN: 555385250 Program No Routing Override: Vsale Value: \$19,500.00 SOFTER AMO Employment: 5 yrs. 0 mon. Program: --Ann. Income: \$60,000.00 Preselect Program: View | Edit Cred Preselect Program ID: View Bookout Details Credit Bureau Information Dealer Information Applicar Dealership: Dealer Submitted By: Jennifer Poe Time Submitted: 10/12/2021, 02:37 PM one: (801) 734-3600 Application - 10/12/2021, 02:37 PM rents Test 123 Sat. Trades: Date Pulled 5

#### 5

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

### **PRINT WORKSHEET**

#### 6

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



### 7

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

				Dealertrack 🜌			Switch to Dealertrack Classic Swit	nh Dealership 🗸 RegUSA
•				F&I Credit Application				* Indi
				Summ Application Type Credit Applic Applicant Info	Auto / New / Individual / Retail	2 Enter Applicant Info		
				First Name *	Middle Initial	Last Name * Suffi	x SSN #*	DOB *
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Application Type Auto / New / Indi	vidual / Retail	Er	nter Applicant Info			Select	Lenders	
Applicant Info							Business Phone * (516) 368-4501	
First Name *	Middle Initial	Last Name *		Suffix	SSN #*	DOB *		
Aaron	optional	Boyd		~	***.**-7183	**/**/****	burce of Other Incom	e
Address 1 *	Address 2	0	City *		State *	Zip *		
1838 N Collington Avenue	optional		BALTIMORE		MD	21213		
Home Phone * Disclosure	Mobile Phone	Disclosure	Email		License State	License #		
(410) 576-5534	optional		optional		optional	optional		
Housing & Employment Info								
Housing Status *	Vrs at ∆ddress *	Mos at Address *	Mort Payment/Rent *					
Mortgage ~	5	0	1,000		1			
Employment Status *	Employer *		Yrs. at Employer *	Mos. at Employer *	Business Phone *			
Employed 🗸	Cox Auto Inc		5	0	(516) 368-4501			
Occupation	Gross Salary *	Salary Type *						
optional	5,000	Monthly 🗸						/
Other Monthly Income				Other Income	Source of Other Income	e		
In accordance with the General Terms and Co	onditions, you are require	ed to read the following	statement to the	optional	optional			

HOUSING & EMPLOYMENT /	
VEHICLE INFORMATION EXAMPLE	

						Housing Status * Mortgage	Yrs. at Address *	Mos. at Address *	Mort. Payment/Ren 1,000		
						Employment Status *	Employer *		Yrs. at Employer *	Mos. at Employer *	Business Phone *
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Dealertrack

Switch to Dealertrack Classic Switch Dealership 🗸 RegUSA Support 😆 🦧

# FINANCIAL INFORMATION EXAMPLE

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

	(							
		Dealertra	ack		alertrack Classic Switch Dealership 🗸 RegUSA Support 🖸			
			Financial Info			100		
			Unpaid Balance	E	stimated Amount Finan	ced Miscellaneou	s Caller	
			Term* 60		Accident/Health Ins.	ptional +	redit Score	
			Cash Selling Price * 20,00	0.00	Credit Life Ins.	ptional +	LTV: 111.11%	
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ncial Info						Hequi		
Jnpaid Balance			Estimated Amount Fin	anced		Miscellaneous		
Term *	60		Accident/Health Ins.	optional	+	Credit Score		
Cash Selling Price *	20,000.00		Credit Life Ins.	optional	+			
Sales Tax *	500.00	+	GAP	optional	+		LTV: 111.11% PTI: 0.00%	
T&L (estimate) *	500.00	+	VSC/Warranty	optional	+	Requested APR	optional	
Cash Down	1,000.00	] -	Back End Fees	optional	+	Est. Monthly Payment	optional	
Front End Fees	optional	+						
Rebate(s)	optional	-						
Total: \$20,000.00			Total \$20,000.00					
							Clear All Vehicle & Financial I	
elosures & Signing n I, the dealer, select the ' e Applicant(s) or read the cted financial institutions itional Comments	Submit This Application disclosures to the App View Disclosure	n" to send licant(s) v	this application to the financi erbatim and that the Applican	al institutions sele t(s) agreed to the	cted, I acknowle disclosures, and	edge and agree that:(i) either d (ii) the Applicant(s) agreed	I provided a printed copy of the disclos that I may submit this application to all	
aler App Comments Te	st							
characters								

#### PRINT CREDIT APPLICATION PDF EXAMPLE

	Des	lertrack 🖉				Switch Dealership 🗸 RegUSA Support 😆 🦨
		dtcom_individual_credit_app_	_without_js_blank.pdf	1 / 3   - 100% +	1 🗄 👌	± 0
			Dealer Name: CC Uni PLEASE PENT - ROCMPLITE AT PLEASE PENT - ROCMPLITE AT PLEASE PENT - ROCMPLITE AT PLEASE PENT - ROCMPLITE AT PLEASE PENT - ROCMPLITE DE ROCMPLITE BE REAL ROCMPLITE PLEASE PENT - ROCMPLITE AT PLEASE PENT -	FI Training PLCATOREW ML NOT BE PROCESSED. "While or of you are mainted	Dealer Phone 8, 516-302-1234 Dealer Fix 8;	d Dpen in Acrobat
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1 / 3	- 100% +   🗧	। <i>৩</i>			State Zp MD 212	13
					at Previous Addres Vis. Mos. State Zip	
Dealer Name: CC I	JniFI Training		Dealer Pho	ne #: 516-302-1234	fired 🔲 Student	
PLEASE PRINT - INCOMPLET	E APPLICATIONS WILL NOT BE PE	ROCESSED	Dealer Fax	#;	in Phone Number i16)368-4501	
You may apply for credit in your name (1) Please indicate whether you are a 2) Eff you are applying for individual the credit requested, complete (3) If you are applying for joint credit * If you are married and live in a comm	alone, whether or not you are married. phymig for □ lindivulai (Credit □ Joint Cre credit in your name and relying on your own i only Section A. it with another person, complete sections A a Applicant unity property state, please complete Section	dit Community Property S ncome or assets and not the in nd B. We intend to apply for jo 	State Business Application ncome or assets of another perso pint credit.	n as the basis of repayment of ign this application. Your spouse	voor application Wei may leep ti	You management
A APPLICANT INFORM	vishes to be a Co-Applicant.			-	subject you to cn lication and any n addition, in ap	ormation minal other contance
Last Name	First Name	Middle Initial	Social Security Number	Birth Date	stations for the just in connection	kirpose of north the
Boyd	Aaron	PO Box Rural Route	669-02-7183	08/28/1956	or any affiliate o her a credit repu	Fours may of was aler and the
1838 N Collington Avenue	, providence and a	The second second	BALTIMORE	MD 21213	<ul> <li>provide such d         and employment     </li> <li>the proposed training of the proposed trainin</li></ul>	aler and it history insection
Home Phone Cell Phone (410)576-5534	Residential Status	Family Other	Time at Address 5 Vrs Mos Rent/l	Ata Pmt \$ 1000.00		
E-Mail Address		Driver's License No.	Driver's License State	Time at Previous Address		
Dravious Full Address (if less than 2	unom) Last#/ Cuite #	ID O Perry I Dural Peute	City	YrsMos.		
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Salary Salary Type 5000 Weekly	Bi-Weekly X Monthly Annually	Occupation	Length of Employment	t Work Phone Number * (516)368-4501		
Previous Employer Name	Previou	is Employment Type	M05.			
	Em	ployed Unemployed	Self-employed Military	Retired Student	Jther	
Previous Occupation	Length of Employm Yrs. M	Previous Work P	none Number			
Alimony, child support, or separate mainter	nance income need not be revealed if you do not cho	ose to have it considered as a basi	is for repaying this obligation.	dia destinational de la compara		
other income (wonthly)	Source of Other Income	X signing, you certify that	use income entered on this Cre	on Application is accurate.		
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Dealer App Comments Test						
		AGREEMENT				
The words "we," "us," "our" and understand and argete that you a application and any other applic on the application and any other penalties. The words "you," you application submitted in connect with the Fair Credit Reporting Ac fulfilling your request to apply for You agree that we may obtain a proposed fransaction and any up	"ours" as used below refer to us, the of are applying for credit by providing the ation submitted to us and information ner application submitted to us, is true "and "yours" mean each person sub ion with the proposed transaction to t t, you authorize that such financial in r credit. This application will be review consumer credit report periodically fir date, renewal, refinancing, modificati	lealer, and to the financial information to complete about you whether or not and complete. You unde mitting this application. Y re financial institutions dis stitutions may submit you ed by the dealer and suc mo neo or more consume on or extension of that tra-	al institution(s) selected to n and submit this credit applit the application is approved rstand that false statements fou authorize us to submit ti sclosed to you by us the de ur applications to other finan th financial institutions. er reporting agencies (credit ansaction. You also agree ti	sceive your application. You cation, We may keep this. Vou certify that the informal may subject you to criminal is application and any other alers; in addition, in accordar cial institutions for the purpos bureaus) in connection with at we or any afflicate of ours	ion ce e of hea	
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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