



GET THE MOST OUT OF **Dealertrack**

Start, Structure, Finance and Transact the deal all in one online deal jacket.





Efficiency

Gain more insight into your customers and business from one system. Use fewer keystrokes and reenter less data to save time and create a more efficient workflow.

Profitability

Work more deals and increase profit with a faster and more efficient workflow. Increase add-on sales with a customer-friendly F&I process.

Customer Experience

With streamlined dealer workflows, you'll significantly reduce customer wait times, which means more time for more customers— and bigger profits.



Dealertrack **GETTING STARTED**

- Accessing Leads
 - Getting to your leads
 - Understanding the details in the lead
- DMS Integration Pick up deals from your DMS
- Credit Applications
 - Credit Application Layouts
 - Credit Application Settings Taxes and Fees Setup
 - Credit Bureaus
- Bookout
 - Integrated Bookout Values in the Credit App
 - Vehicle Valuation Process
- Locate Deals
- Deal Status
- Deal Jacket
- Requesting Payoff Quotes
- Compliance
 - Running Compliance Red Flags/OFAC
 - Compliance Actions
 - Compliance Activity
- Document Storage
- Deal Calculator
- Accelerated Title[®]





👉 Dealertrack

GETTING TO **Your leads**







Dealertrack by Cox Automotive

UNDERSTANDING THE **DETAILS IN THE LEAD**





PICK UP DEALS From Your DMS



Bring in deals from your DMS by utilizing DealTransfer*.

DMS Integration is currently supported for the below providers.

- 1. CDK Global
- 2. Reynolds & Reynolds
- 3. AutoSoft
- 4. Grapevine
- 5. Advent



TRANSFER DEAL DATA FROM DMS

Call us today to get started with DealTransfer. 877-453-9912 | Option 6

*Subscription required.





Imported Deals

Lender Referral

A STREAMLINED **Credit Application** Process

Click Create in the top navigation bar. Next, click Credit Application. Here, you can search for an existing customer and avoid duplicate entries. Create a new customer or quickly import a deal.





AN EFFICIENT **CREDIT APPLICATION** PROCESS

The multi-page credit application will remain the default view and has 3 different sections:

1. Applicant 2. Vehicle & Finance 3. Select Lenders



Newly Enhanced Credit Application

Application on Dealertrack uniFI.

See what's new>

Auto-Only Dealers have access to a newly enhanced Credit

	000 C 3		ww.dealedrack.com	
John Smith (ROI Motors) 🗸				John Smith (ROI Motors) 🗸
Switch Dealership 🗸 Support 💩 🧟	@ Dealertrack			Switch Dealership 🗸 Support 💩 🧟
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	Contract			
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Credit Application | Applican

O Yes O No

Co-Applicant

Dealertrack

Summary Created Application Credit Decisi Contract Menu Deal Calcula



CREDIT APPLICATION SETTINGS **TAXES & FEES SETUP**

To access the Settings page, click the gear icon — located on the top right of the screen.

- 1. You can now select your vehicle default. If you're predominately a Used store, click 'Used'.
- 2. In the 'Taxes and Fees' section, choose your state and enter in the tax rate. The tax rate will be multiplied by the cash selling price and the calculation will be done for you.
- 3. Then enter your applicable fees and click 'Save'.







PROCESS CREDIT BUREAUS **QUICKLY**





Click Create in the top navigation bar. Next, click Credit Bureau.

Quickly search for an existing customer to avoid duplicate entries or create a new customer. Credit bureau request forms will be 40% pre-filled if you are pulling bureaus on Dealertrack, saving you time.



Dealertrack

Menu Deal Calculi

INTEGRATED **BOOKOUT VALUES** IN THE CREDIT APP

- 1. Once you arrive to the vehicle section of the credit app, you will be able to start the vehicle valuation
- 2. Key in the details or simply key in the VIN number and watch the year, make, model and trim populate

- 3. Fill in the odometer field
- 4. Click 'Start Valuation'

AN INTERFACE WILL OPEN UP - SIMPLY CLICK NEXT TO BEGIN THE VALUATION PROCESS







Next



SIMPLE AND EASY **VEHICLE VALUATION PROCESS**







THE DEALS PAGE — Your gateway to every deal



SEARCH YOUR ENTIRE NETWORK:

Locate a specific customer and pick up right where you left off.

IMMEDIATE VISIBILITY INTO CURRENT DEALS:

Hover over status icons to view the most recent updates for your deals. Click on the status pop-up to take you directly to the page you want work on:

 Credit Bureau, Credit App, Desking, Menu, and Contract Screen

WALK ME THROUGH:

Use the **Walk Me Through** feature when you need additional guidance.



LOCATING & REVIEWING **DEAL STATUS**

While still on the Deals page, you can easily click on App Status or Contract Status to get a view of where all your deals are in the funding process.





Status Updated	Contract Status		🕀 Print	
Today	Active App Status Contract Status Extern	nal Deals		
- Status	Sort by: Newest V		results 51-75 of 489	
In Transit (\$418,109,99)	John Smith (Setail)	Bank of America		
Contract Received	4 days ago	Ref ID: AIL0986666DTCOM	Verification Expired	
Contract Submitted		341,494.00		
Docs Received	Dale Rgnw (Retail) 5 days ago	Hyundai Motor Finance Ref ID: AIL0988178DTCOM	\$ Funded 12/10/2019 4/22 p.m	
Partially signed		\$54,483.20	the folder of the part.	
Pending Docs	Test Lstname (Retail)	NMAC/IFS	→ Not Started	
Pending Verification	5 days ago	Ref ID: AIL0988004DTCOM \$41 538 00		
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E Fax Funded	5 days ago	Ref ID: -	N N	
U Funded	Deal One (Retail Spot Contract)	NMAC/IFS	A Construct Sound	
- Type	5 days ago	Ref ID: -		
Retail Lease	New Dms New Dms (Retail) 6 days ago	NMAC/IFS Ref ID: AlL0986594DTCOM	→ Contract Saved	
		\$33,994.00		
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EFFICIENCY INSIDE THE **DEAL JACKET**

After clicking into a customer name, you enter the deal jacket...

Here, in one centralized location, you can see all the latest activity around the customer.

The header section within each deal jacket helps make those everyday credit actions much faster– while also providing a summary of the deal.

EASILY ACCESS OTHER PARTS OF THE DEAL	-
MAKE CHANGES TO THE APPLICATION	
COPY AN APPLICATION	
VIEW VEHICLE & DEAL INFORMATION	







REQUESTING **Payoff Quotes**



Easily request a payoff quote through Dealertrack.com and receive an accurate payoff amount directly from your lenders.

Click the 'Lenders' tab then click 'Payoff Quotes'.

Deale	ertrack			•			Sumner Winston (314962 Lake Success Dealership) 🗸 🗱
F&I ~	n Lei	ads Deals	Vehicles	Lenders \vee	Reports	Create ~	Search for customer or vehic
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LENDERS





RUNNING COMPLIANCE **Red Flags/Ofac**



Located on the credit bureau request form are integrated check-points making it easy to comply with Red Flags Rule and OFAC requirements.



Subscription required.



CHECK OFF Compliance actions



With the Compliance Check-List, located on the Compliance tab within the deal jacket, you can:

- Easily view status and take action for compliance to avoid unnecessary penalties
- Verify customer identities allowing you to comply with the Red Flags rule & OFAC
- Quickly identify deals that are candidates for Adverse Action and easily print adverse action notices to provide to your customers
- Verify your applicant's true identify by asking Out of Wallet questions





Subscription required.





MONITOR COMPLIANCE ACTIVITY WITH A **COMPLIANCE DASHBOARD**

Click on Reports in the top navigation bar to access Compliance Dashboards & Reports.

- Filter activity by month and/or vehicle type
- Easily monitor activity with on-demand reports and a comprehensive dashboard allowing for ID Verification and Compliance status of all deals
- Generate reports in PDF and/or Excel



Subscription required.



STORING DOCUMENTS FROM THE DEAL

When subscribed to Dealertrack F&I Compliance, you will have peace of mind that all documents will be saved for up to 10 years in case of an audit.







Dealertrack by Cox Automotive

CALCULATE PAYMENTS WITH INTEGRATED **DEAL CALCULATOR**

Calculate accurate payments through a fully integrated Deal Calculator with taxes and fees by zip code

Real time access to Aftermarket providers to select and apply product and services in payment calculation

			Capital V	reports.		Quick Links:	App Status Credit App Contract S	atus -
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	Summary Bureau Complete	Hazel Testco Edit 77 Palace Court Lake Success, NY 11042 Nome: (\$31) 566-9999	Retail 2019 Audi A6 Est Premium Plus 55 TPSI quattro Transmission: Autometic	Mileage: 10	Deal Payment: 8972 Rate: 5.49%	Amount: \$50,808.00		
	Credit Bureau 🕑	Co-Applicant: (None) Add Application: Copy and Create New	VIN: WAUL2AF20KN048008	Stock #: -	Term: 60			
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		• MSRP 58,900.00	Trade Allowance	0.00	2019 Audi A6 Edit Premium Plus 55 TESL ou	attro		
		* Invoice 55,368.00	Trade Payoff	0.00	or Search from Inventory			
		Discount (\$) 1,500.00	Trade ACV	0.00	Summary			
		Selling Price 57,400.00	Days to 1st Payment	45	Selling Price w/ Adds	\$58,012.00		
		* Term (Monthly) + 60	Aftermarket	0.00	Net Trade Total Interest	- \$7,540.20		
		* Rate % 5.490	Taxes	2,296.00	Total of Payments	\$58,348.20		
		* Cash Down 3,500.00	Fees	612.00				
		Hold Deposit 0.00	Dealer Cash	6,000.00				



CREATE A NEW DEAL

Click the Create tab, then click Deal





DEAL CALCULATOR

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New Deal Application Search for a Customer		
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FIND OR CREATE CUSTOMER

Easily search for a customer that is already in your network or create a new customer

ENTER ZIP CODE

By entering the zip code, your payments will be more accurate and your calculations with taxes and fees will be faster

BEGIN CALCULATIONS

- You are now brought to the deal calculator screen which is available in each of your customer's deal jacket – located in the Desking tab
- 2. Enter information about the deal for fast and accurate payments
- You can add a vehicle enter VIN# or Stock# to decode vehicle information
- 4. Click **Update Deal** to update the header section of the customer deal jacket



ACCELERATED **TITLE**®

Accelerated Title speeds the payoff and title release process to as fast as 4-6 days, expediting the process from weeks to days!*

ACCESS INSIGHTS AND ACCURACY



24/7 STATUS TRACKING

GET YOUR PAYOFF QUOTE

🙆 Dealertrack Dealertrack Title Releasable Good Through 11/18/2018 Michael R Duvall 23 days Rockingham Ban MEFM75W96X65445 Phillip C Smith JR 24 days Rockingham Ban Borrower First Name Last Name Address Ohy State 0 seconds Rockingham Bank C Payoff Su BN3EZXFOHES7LPTW lilliam J Smith /P/ 18 days Ø Canceller 🖌 Tite Retessable 24 days CBFC A Title Excer Zp Code 3FA6P0LU8DR151880 oehn Brandon (P 25 days MV Proce TDDN141020075150 ASSTREE 25 days Rockingham B Sent to DM Steve Smith (Retai 25 days C Title Pr Ze Cod 1ZVF T84N355216102 25 days CBFC C Title P 1ZVF T84N355216101

You can search for a saved Payoff Quote, or click the **Obtain a Payoff Quote** button to start a new one. Proceed to enter payoff details.

Subscription required. *Based on average industry timeframe for vehicle title release and vehicle payoff process of 18+ days, as determined by Dealertrack data. View full title details electronically and gain unparalleled insights for increased confidence in the deal, as well as receive accurate payoff amounts, based upon the date of your choosing. Click the **Payoff** button to proceed to the payment screen and click **Submit** to complete the Accelerated Title transaction. Even after the transaction is complete you have 24/7 visibility and transparency into payment and title status. Know when to expect title delivery, and quickly identify where all trade-ins stand for turnover directly on the platform... without having to call the Lender.



Dealertrack EXPERIENCE A FASTER WORKFLOW







INNOVATION Through integration

Dealertrack is a leading provider of digital solutions to the automotive retail industry. Our integrated and intuitive approach to products and services makes your workflows more efficient, transparent, and profitable. From Digital Retailing tools that bridge the gap between the online and in-store experience to the largest lender network in North America, we help enable the transformation of auto retailing through a comprehensive solution set spanning DMS, Fixed Operations, Sales and F&I, and Registration and Titling.

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COX AUTOMOTIVE