Fortellis Service Connect Instructions

FORTELLIS
Automotive Commerce Exchange™

The intended audience of this guide is Fortellis ISVs (Independent Software Vendors). This document describes how ISV users will register their Service Connect account, use the Service Connect to open and review support cases, and administrator controls.

Contents:

Section 1 – Introduction

This document will guide you through the Service Connect registration process, administrator controls, and support case management.

The Fortellis team will initiate the ISV account creation for a hand-selected Administrator using the below details:

- Email Address – The email address of the specified user containing the ISV's domain, such as jane.doe@cdk.com. (Do not enter a personal email address.)
- First Name – The first name of the individual ISV user
- Last Name – The last name of the individual ISV user
- Language – Apporopriate language based on region

Using this guide, you will be able to:

- Activate a Service Connect Anywhere account

- Manage additional users with the Administrator controls (select users only)

- Open, review, and manage cases created for the Fortellis support team

Section 2 – Steps to Activate an ISV Service Connect Account

CDK will initiate the process for the initial administrative user. All other users will be managed by the ISV's designated administrator(s).

Once the administrator has created a new user account, the ISV user will receive an email detailing the steps required to complete the account validation process.

Service Connect sends a Validation Code and a link to complete the registration as shown below:
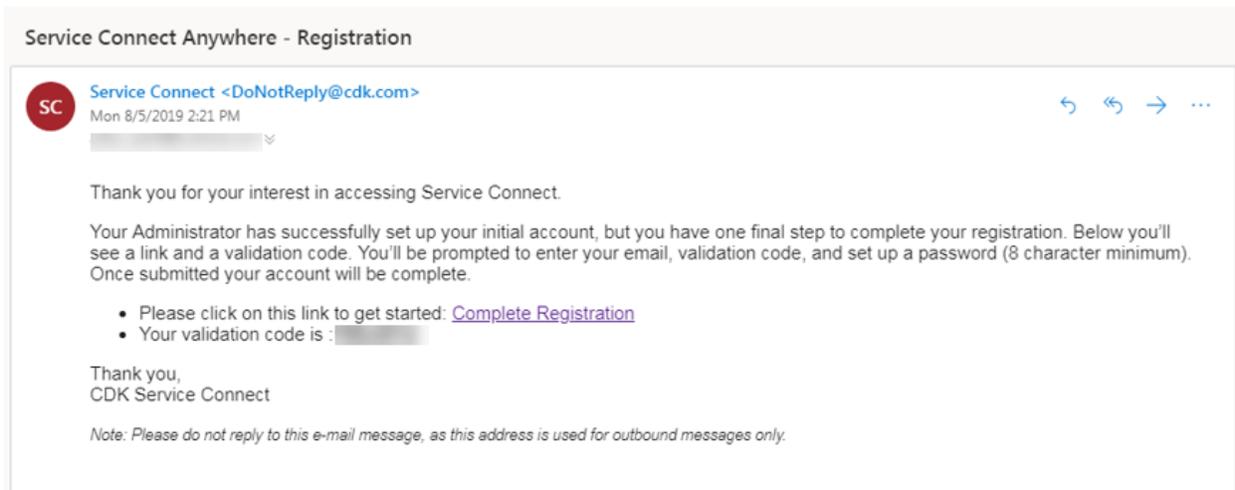
Click the *Complete Registration* link to be directed to the Service Connect Anywhere registration page and enter the following:

- Email – This is the email address used by the administrator to create the account and where the validation code was sent.
- Validation Code – This is the code found in the email referenced above. Copy and paste the unique code into the space provided.
- Password – Enter a password for access to Service Connect Anywhere. If the password is too basic, Service Connect Anywhere may prompt for revision.

Once all fields are complete, click *Register*. Service Connect will process all the information entered, and return a success message containing a link to login.

Click *Login here* to be directed to the Service Connect Anywhere login page and enter the email and password used on the account creation steps above.

Once logged in, complete the one-time profile update screen. Service Connect displays all the information gathered thus far, and prompts for a phone number for callbacks. This should be a direct desk phone for the user or a support phone number that will be able to assist with the issue. The only job title available to the ISV user will be "CDK Partner".

Once the phone number has been added to the profile, click *Submit*. The account creation process is complete.

Section 3 – ISV Administrator Controls

The newly created ISV Admin has special permissions to create/maintain additional employees belonging to their company. These features can be found in the Manage Users tool as indicated by a group icon in the bottom of the Service Connect main panel.
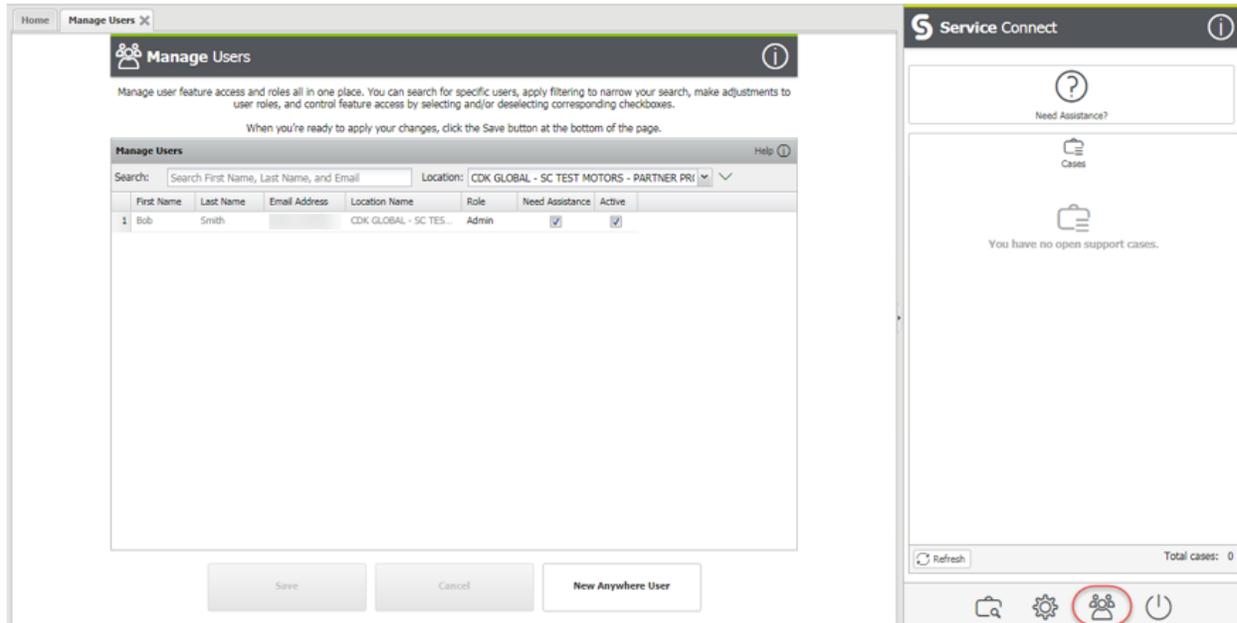
The Admin can initiate the registration process for new users by clicking the New Anywhere User button near the bottom of the page. The Admin is presented with a form asking for the Name, Email and Location of the user they are initiating.

Once submitted, Service Connect sends a Validation Code and a link to the new user to complete the registration steps shown in Section 2.

Additionally, the Admin has other user controls to customize including:

- Access to Need Assistance - Control over the ability for a user to submit cases to CDK
- Active/Deactivate - If users are no longer employed with the vendor, the Admin can uncheck the 'Active' box to restrict access to Service Connect.
- Role - The admin can assign unique roles to any user associated with the vendor account. Role definitions can be found in the Help section of Manage Users. These include:
  - **Basic** – Users with the role of Basic can submit cases, but can only search and view their own cases (and no others).

- o **Enterprise** – User with the role of Enterprise can submit cases, and can search through all cases associated with the vendor account, but only see/update details of their own cases.
- o **Admin** – User with the role of Admin can submit cases, and can search/view/update any cases associated with the vendor account. Additionally, Admins have access to Manage Users, and can control the other features defined above (initiating new users, controlling access to features, disabling users, etc.)

When an Admin initiates the creation of a new user, that new user is granted the role of Basic by default. Once validated, the Admin can promote said user to whichever role is necessary.

Section 4 – Service Connect for ISVs

Now that the account creation process has been completed, the newly registered user has access to Service Connect. Given the unique role of the ISV, Service Connect displays the following features:

- Need Assistance – Access to add a case for the Fortellis support team.
- My Open Cases – Manage open cases directly from the Service Connect Front Panel.
- Case Search – Search open and closed cases for the registered Customer Master File (CMF) number.
  - The CMF number is CDK unique Customer Number for each client.
- My Settings – Modify user information including email(s), phone number(s), language preference, and password changes.
- Manage Users – Allows the creation and account management of additional Service Connect accounts for other personnel belonging to the ISV; accessible only to users with administrator privileges.
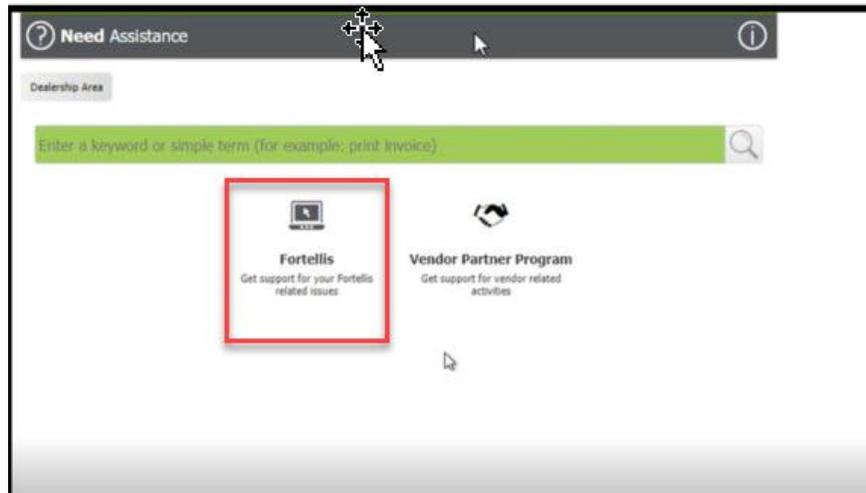

Create Cases
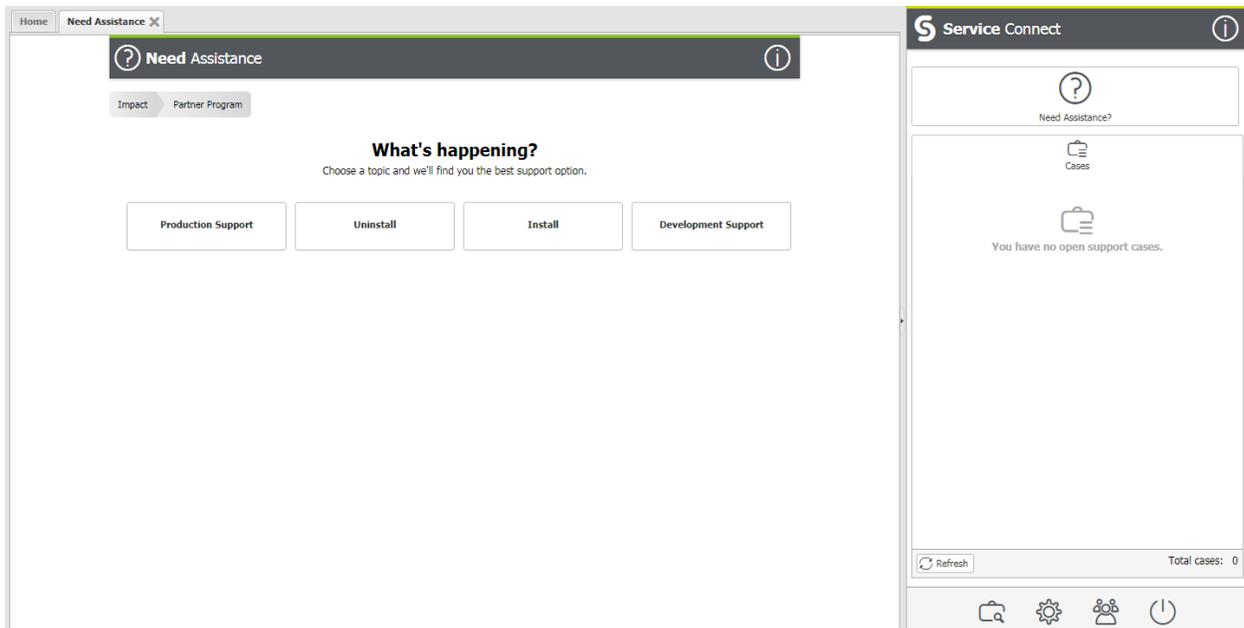
Log in https://serviceconnect.support.cdk.com using your established Service Connect username and password.
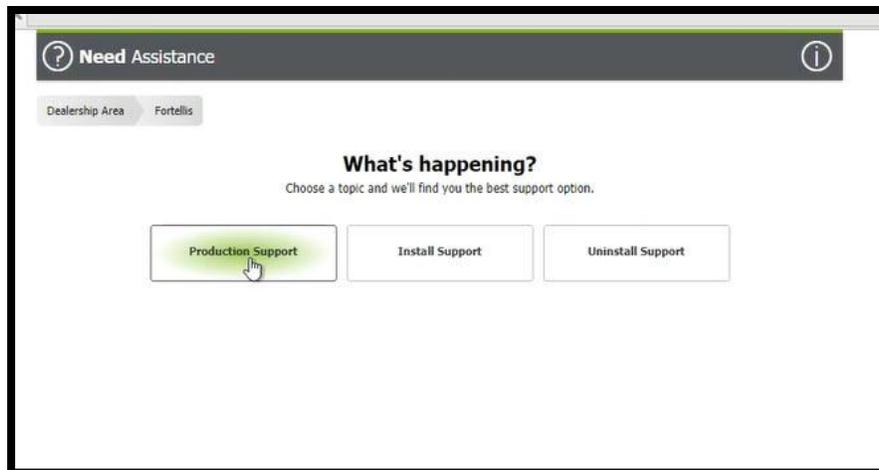
Click *Need Assistance?* in the Service Connect support panel.
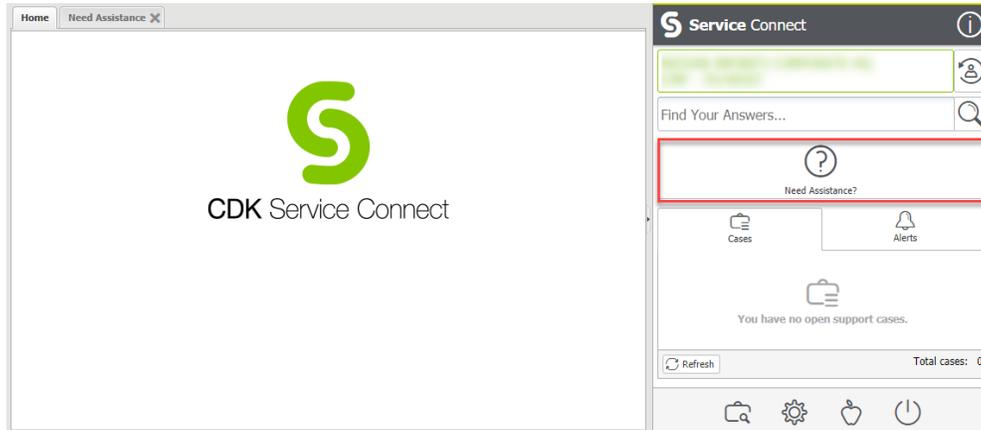
Select *Fortellis* when asked for Area of Impact:

Then choose from one of the available options shown:

- Production Support – for issues with a dealer who is up and running with your integration
- Uninstall Support – to remove your integration from a dealer and/or stop billing
- Install Support – to add your integration to a dealer using the manual addendum process where there is an eStore exception.

Follow the workflow to build the case. Fill out as much information as you can into this form, attach files and select *next*:

At the Contact Options screen, click *Submit* to receive all updates and correspondence for this case.
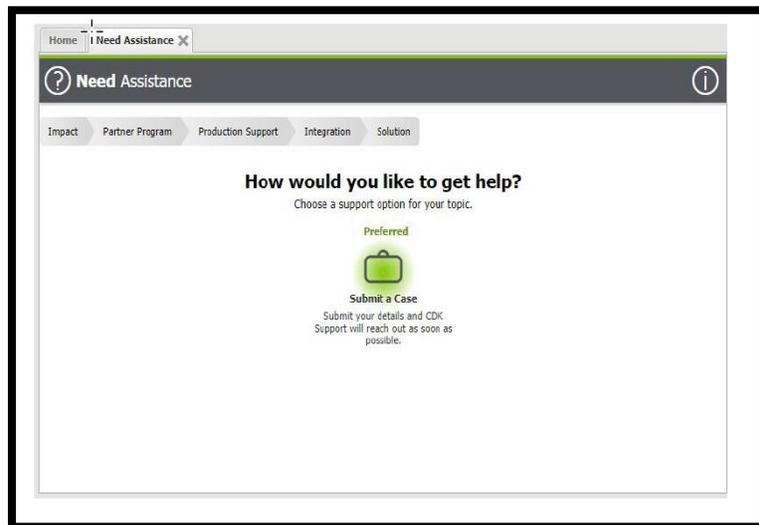
Search for Existing cases

Opened cases owned by you may be locate in the *Cases* section of the Service Connect support panel.
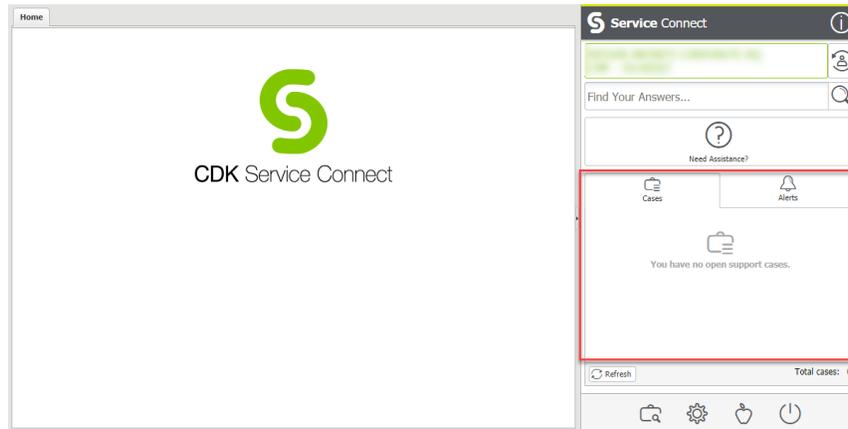
To search for an existing case that is either closed or opened by another user, select the *case search* icon in the Service Connect support panel:

Toggle or enter the necessary search criteria, then select *Create Case Report*:

Section 5 – Production Support SLA

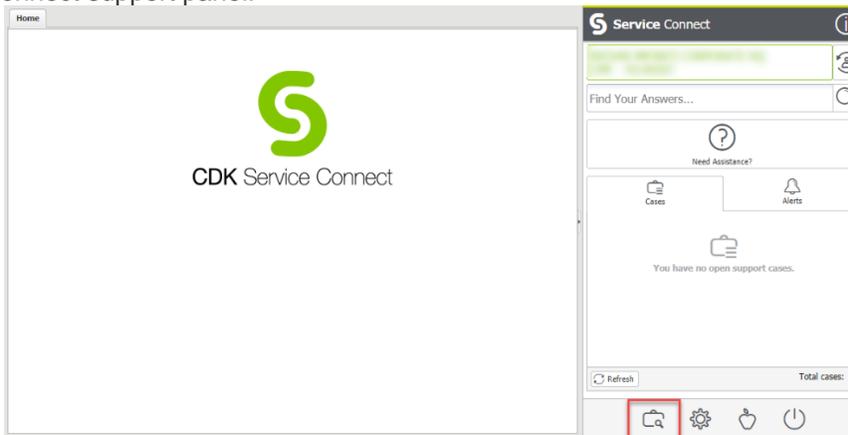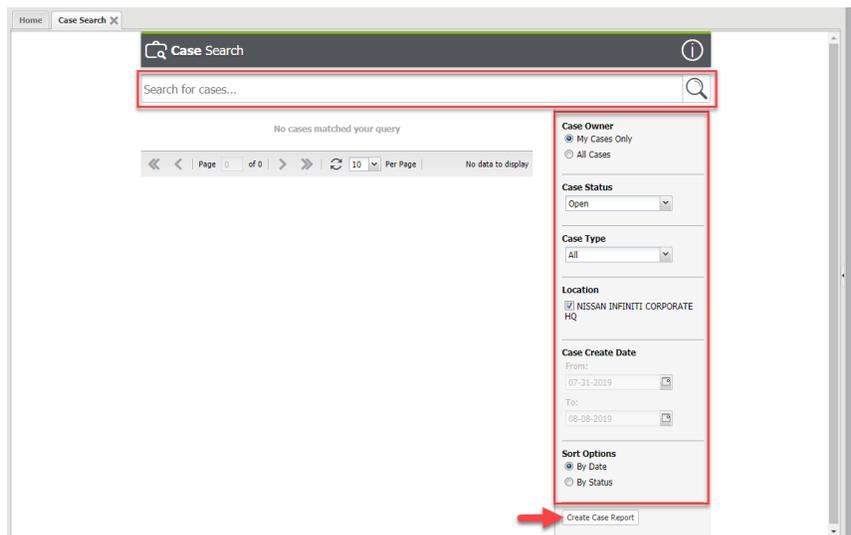The Fortellis support team is available Monday through Friday, 8am – 8pm Eastern Time. The best way to reach the team is by adding a case through Service Connect, as shown above. They are also available by phone at (866)469-1225, option 3.

This is the standard process to follow for any issue your customers encounter.
- The vendor supplies Tier I support to the dealer ensuring the application is working correctly.
- CDK supplies Tier II support to the vendor when data integration is not functioning as expected. The vendor escalates to the Fortellis support team via Service Connect case.
    - CDK accepts/reviews case and provides updates to the vendor.
    - CDK closes support case once resolved.
- Initial Response: within 2 business days of receipt.
- Follow-up: every 2 days until resolution.
- If additional information is needed from the vendor, CDK will follow-up for 1 week. If no response is received after 1 week, the case will be closed and the vendor will need to open a new case.

Appendix – FAQ's

- What if the user I'm trying to initiate does not receive the email after I submitted?
    A: Instruct the user to check their "junk" folder. Verify the exact email address with the user.

- What if I resubmitted the email multiple times, and the user still isn't receiving it?
    A: Open a production support case with the Fortellis team via Service Connect providing the email address in question along with the First and Last Name of the user and any other supporting information, such as approximate time the verification code should have been sent.

- How can an Admin change the role of another employee at the ISV Company?
    A: Open Manage Users in Service Connect, find the user in question and click directly on the name of the Role in the row. This will open a dropdown selector. Make your appropriate selection, click Save, and have the user log off and back on

- How can an Admin restrict an ISV employee who no longer works for that company?
    A: Open Manage Users in Service Connect, find the user in question and uncheck the "Active" box. This will deactivate any/all access to Service Connect for the selected user.

- How can an Admin create a new user?
    A: Open Manage Users in Service Connect and click on the "New Anywhere User" button at the bottom of the page to initiate the New User process

- How do I log out of Service Connect Anywhere?
    A: Click the icon in the lower right of the Service Connect panel that looks like a power button

- How long is the verification code active?
    A: 48 hours. The administrative user may be able to resend the verification code.