Fortellis Service Connect Instructions



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.

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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.

Service	Connect Anywhere Account Validation	
Validate your n	ew Service Connect Anywhere account by filling in a few details below.	
Email *	Validation Code *	
Password *	Retype Password *	
		DECET

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.

Service Connect Anywhere Account Validation	
Congratulations! Your new Service Connect Anywhere account has been validated successfully. Login here and add the website to your favorites.	

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.

	S
	Log in to your Service Connect Anywhere account
	Email *
\simeq	
	Password *
0-	••••••
	Forgot Password?

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".

To ensure the best communication options with CDK Support, requirement of Service Connect is valid contact information including email. Once submitted, you will receive an email with validation code. Name: Bob Smith Direct Phone Number for Callbacks: Enter your direct phone number (avoid the switchboard). Work Email Address: Job Title: CDK Partner Location:	Service Connect	(
Name: Bob Smith Direct Phone Number for Callbacks: Enter your direct phone number (avoid the switchboard) Work Email Address: Job Title: CDK Partner Location: COK CALL CALLER DECORD.	To ensure the best communication options with requirement of Service Connect is valid contact i including email. Once submitted, you will receive validation code.	CDK Support, a nformation an email with a
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Enter your direct phone number (avoid the switchboard) Work Email Address: Job Title: CDK Partner Location: Cox Co ContCo. TOCL MOTORC	Direct Phone Number for Callbacks:	
Work Email Address: Job Title: CDK Partner 🖉 Location:	Enter your direct phone number (avoid the swi	tchboard)
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	Submit	

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.

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		ළු Mana	age Users						(\mathbf{i})			
		Manage user fe	eature access a user W	nd roles all in one roles, and control hen you're ready t	place. You can sear feature access by s	rch for specific selecting and/o	users, apply filtering t deselecting correspo ve button at the botte	o narrow your search, make nding checkboxes. om of the page.	adjustments to		Need Assistance?	
		Manage Users							Help ①		Ê	
		Search: Sea	arch First Name	, Last Name, and E	imail L	Location: CDK	GLOBAL - SC TEST M	OTORS - PARTNER PRI	\sim		Cases	
		First Name	Last Name	Email Address	Location Name	Role	Need Assistance	Active			ĉ	
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				Save		Cancel	Nev	Anywhere User				
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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.

New Service Connect Anywhere User								
Enter a few details about the new user								
First Name:	Jane							
Last Name:	Doe							
Email:	and an an an an							
Location:	CDK GLOBAL - SC TEST MOTORS - PARTNER F							
	Submit Cancel							

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).

- 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.
- 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.

Home Need Assistan	nce 🗙					Service Conne	ect	()
(7	Need Assistance			\bigcirc	I			
Im	pact Partner Program					N	leed Assistance?	
		What's hap Choose a topic and we'll find y	ppening? ou the best support option.				Cases	
	Production Support	Uninstall	Install	Development Support			Ê	
						You have	no open support c	ases.
					V			
						C Refresh		Total cases: 0
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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.

Home	Need Assistance 🗙	Service Connect	Ó
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	G	Find Your Answers	Q
		Need As	ssistance?
	CDK Service Connect	Cases	Alerts
		You have no op	en support cases.
		C Refresh	Total cases: 0
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Select Fortellis when asked for Area of Impact:

Need Assistance Dealership Area	244 274	k	0
Enter a keyword or simple	term (for example; print i	woice)	Q
	Fortellis Get support for your Fortellis related issues	Vendor Partner Program Get support for vendor related activities	
		Da	

Then choose from one of the available options shown:

lership Area Fortellis			
	What's happening?	•	
Choose	a topic and we'll find you the best sup	port option.	
Production Support	Install Support	Uninstall Support	

- 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*.

Need Assistance		Ó
Location Dealership Area Forte	Ilis Production Support Create Case	
Plea	se provide us with some more information	
App Name:	Please enter the name of the Application	
Dealer Name:	Please enter the name of the Dealership	
Error Message:	What error message do you see (if any)?	
API Name:	What is the name of the API for which you need assistance	
Subscription ID:	Please enter the full Subscription ID	
JSON Request:	Please past the JSON request and response body	
Case Title:	Please enter a Case/Topic title	
Additional Notes:	Please add any additional notes for Support on your case.	





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:

Home	Case Search 🗶			<
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		Search for cases 🔍		onnect
		No cases matched your query	Case Owner My Cases Only	
			All Cases	
			Case Status Open	
			Case Type	
			Cocation I NISSAN INFINITI CORPORATE HQ	
			Case Create Date From:	
			07-31-2019	
			08-08-2019	
			Sort Options By Date	
			© By Status	
		-	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.