

The CDK eForms Library

“Look and Feel”



Frequently Asked Questions

A screenshot of the CDK eForms Library's "Form Search" page. On the left is a sidebar with navigation links: HOME, REFRESH BLOCKS, ORDER HISTORY, PRE-ORDERS, SUBSCRIPTIONS, and SHOPPING CART. The main content area is titled "Form Search" and contains a search form. The form has a header instruction: "Search using any one of these options to download forms for the first time. To refresh downloaded forms, use the link REFRESH BLOCKS in side bar". Below this are several input fields: Form ID, Form Name, Catalog Number, States (dropdown), Vendor (dropdown), Form Description, Form Category (dropdown), Manufacturer (dropdown), Revision Date, and Recently Added Forms (dropdown). A blue "SEARCH" button is at the bottom right of the form.

Updated February 5, 2019

Question #1—What has happened to the eForms Library?

The F&I eForms Library has a whole new look! We are updating the appearance of our library to a new modern style that we hope you will find cleaner and easier to navigate. None of the functions or data in the library have changed; these changes are strictly cosmetic.

Question #2—If I still have questions after reading this document, who do I contact?

Please open a support case via Service Connect, if you have any further questions or issues.

Question #3—How do I login?

Logging in will be not different from what you do currently. Navigate in a web browser to <https://portal.dealersuite.com/LenderForm/> and enter your username and password.

CDK F&I eForms library increases dealership effectiveness and productivity by enhancing the business processes of managing dealership vendor forms. Our unique application integrates people, processes and information to decrease implementation times and the total cost of ownership. Using CDK F&I eForms library, people interact with business processes and access information quickly and easily, driving productivity, ease-of-use, reduced cycle times and creating rapid time-to-value.

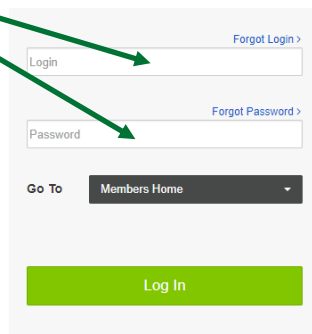
For F&I eForms Library support call 1.866.668.5394 option 4,1,1

LOGIN

Enter Login Name and Password

***Note: Both Login Name and Passwords are case sensitive.**

If you do not have a Login Name and Password Please call 866-668-5394 Opt. 4, 1,1 .



Forgot Login >

Login

Forgot Password >

Password

Go To Members Home

Log In



...then select a CMF if more then one is listed. If your dealership owns more than one location, you may see several CMF Numbers to choose from. The dealership information on the right will change to match each selection. Select your location and press **CHOOSE**.

Choose and verify the available CMF number and the associated eForm dealership information, then press CHOOSE button.

CMF Number
09700128

Dealership Name
AUTONATION INC

Branch Location

Address
999 Good Ave NotBad City FL 999999

Phone Number
123-456-7890

Email
dontaskme@qwe.com

Contact Name
John Carter

CHOOSE

All CMFs associated with your logon name used will appear in this dropdown for the user to select

Question #4 How Do I Order new Forms?

Check out the old interface for Ordering Forms....

Dealership: AUTONATION BUICK GMC PARK MEADOWS #2106
Main Menu for Cntrl: 37145792

CHANGE CMT | SHOPPING CART

Dealer Options

- REFRESH NUMBER BLOCKS
- VIEW ORDER HISTORY
- MANAGE PREORDERS
- MANAGE SUBSCRIPTIONS

Form Search Options

Search using any one of these options to download forms for the first time. To REFRESH downloaded forms, please use the link provided under "Dealer Options".

Form Name:

Form ID:

Catalog Number:

Vendor:

Form Category:

Manufacturer:

States:

Form Description:

Revision Date:

Recently Added Forms:

SEARCH

And the new!

HOME

RB REFRESH BLOCKS

OH ORDER HISTORY

PO PRE-ORDERS

SU SUBSCRIPTIONS

SHOPPING CART

Form Search

76170836 - AUDI BELLEVUE #2946 (AutoNation) [Package Running Total: 0 of 50]

Search using any one of these options to download forms for the first time. To refresh downloaded forms, use the link REFRESH BLOCKS in side bar

Form ID

Form Name

Catalog Number

States

Vendor

--- Any ---

Form Description

Form Category

Manufacturer

--- ANY ---

Revision Date

Recently Added Forms

--- All ---

SEARCH

As you can see, we’ve moved some things around a bit, but all of the search boxes and links are still there. Pressing the **SEARCH** button after entering your search options will result in a view of results like:

Form Name	Vendor Name	Form ID	CDK Item #	Catalog #	Revision Date	State	Form Category	DCAP Equivalent	Actions	Entitlement Required
LAW GA-ARB Retail Installment Sale Contract Simple Finance Charge	LAW FORMS (R&R)	45164	9418301	553-GA-ARB-eps-14 9/15	9/15		LAW Contract Agreements			

Rows per page: 20 1 - 1 of 1

...providing you with the same information and options you are already familiar with.

Then to complete the order....

1. Use the Shopping Cart Icon

Search Result

Click on the **Shopping Cart** to purchase Form

Form Name	Vendor Name	Form ID	CDK Item #	Catalog #	Revision Date	State	Form Category	DCAP Equivalent	Actions	Entitlement Required
WISCONSIN SALES AND USE TAX EXEMPTION CERTIFICATE	WISCONSIN STATE DMV	11140	9409319	S-211aaa	7-09		DMV			
AHFC - First Time Buyer Checklist	HONDA FINANCIAL SERVICES	11400	9413658	FTBCKLST	10/09		Misc - Other			
AHFS - Colorado Disclosure - Optional GAP Coverage	HONDA FINANCIAL	11401	9413659	GAP-CO (11/03)	11/03		Insurance - GAP			

2. View the Form Information-

Please review your order information. If you need to update the order, click the UPDATE ORDER button.

Vendor Name 98010000 ADP GENERIC DEALER	Billable NO
Form Name Buyers Guide 1	Global Install NO
Catalog Number 16 C.F.R. 455	C Number C777777
Revision Date unknown	Selected Logons TEST-FI
Form ID 140	Cost 0.00
CDK Catalog 0	Note Cost will be applied only if beyond package limit.
	Subscription Fee \$0.00 for 5 forms

Click **ADD TO CART**

ADD TO CART **UPDATE ORDER**

3. Agree to the Disclaimer-

Disclaimer, License and Liability Limitation
97700128 - AUTONATION INC

CDK has streamlined the FSI contracting process by making available a convenient and comprehensive e-dealership.

By ordering forms, you agree that the forms may only be used on behalf of the dealership you are doing dealership.

Some forms provided on the FSI eForms Library may have an additional fee for the ability to print a specified block of forms. This fee is over and above any quoted fee for the mapping, download, or adjustment of the form loaded on your DMS.

By using the CDK FSI eForms Library and any forms made available thereon, you agree that in no event will CDK be liable for any special, consequential, incidental or indirect damages arising out of your use of the FSI eForms Library or the forms made available to you, however caused, whether by breach of contract, negligence or otherwise, and whether CDK has been advised of the possibility of such damage. These limitations will apply notwithstanding the failure of any essential purpose.

DealerCAP does not substitute for legal advice, nor does the use of DealerCAP guarantee that legal challenges or issues will not occur. No warranty is made as to the compliance of DealerCAP forms. It is essential that you seek independent legal advice with respect to the legal compliance of your dealership forms.

CDK does not provide legal advice. No warranty is made as to legal and/or regulatory compliance of forms made available on this site. CDK recommends that you seek independent legal advice regarding the use of dealership forms.

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I AGREE **I DISAGREE**

The text of the disclaimer has not changed

4. Select One or More logons-

Vendor Name
98010000 ADP GENERIC DEALER

Form ID
140

Form Name
Buyers Guide 1

Global Install
No

Block Size
5

CNumber
C777777

Logons
ADAM-FI
CPFI6-FI
DEMO-FI
DJ-FI
TEST-FI

ADD FORM

Select one or more logons from the list. These logons will be able to print the form being purchased.

Then Click **ADD FORM**

Select **CHECK OUT** to complete the order, or **ADD FORM** to purchase additional forms.

5. ...And Check Out

Shopping Cart
97700128 - AUTONATION INC

Dealership Information

Email
dontaskme@qwe.com

Phone
123-456-7890

C Number
C777777

Billable
NO

This section is all the orders you placed.

Form Name	Vendor Name	Form ID	Global	Logons	Subscription Fee	Download Fee	Form Cost	Actions
Buyers Guide 1	98010000 ADP GENERIC DEALER	140	No	DJ-FI	0.00	0.00	0.00	

Total Cost (US \$): 0.00 **Note: Total fee is not final until checkout.**

This section is all the preorders you placed.
New form needs programming and form will be delivered to you once done programming Form Cost is tentative and will be applied properly when delivered.

CNumber	Form Name	Vendor Name	Form ID	Global	Logons	Not Mapped	Entitlement Required	Subscription Fee	Download Fee	Form Catalog #	Form Cost	Actions
C777777	AHFC - First Time Buyer Checklist	HONDA FINANCIAL SERVICES	11400	No	DJ-FI	Yes		0.00	0.00	FTBCKLST	0.00	

CHECK OUT **ADD FORM**

Question #6—(for Vendors) How do I Add New Forms to my Portfolio for Purchase?

Your existing form portfolio will look like:

ADMIN HOME VENDOR ACCOUNTS DEALERSHIP ACCOUNTS HOME SUBSCRIPTION ENTITLEMENT ADD NEW FORM	Form List									
	State/Province: --- ANY --- Form Status: Active Forms Filter: --- ANY --- Value: SEARCH RESET									
Form Name	Form ID	CDK Item #	Catalog #	Revision Date	State	Form Category	CDK Status	Actions		Add New Revision
Annexe - communication anti-pourriel	59306	9499901	Annexe - communication anti-pourriel (09095901)	04/10/2017	QC	Dealer	Available - Design	  		Add Revision
ANTIROUILLE	59307	9499901	ANTIROUILLE (09095901)	04/10/2017	QC	Dealer	Available - Design	  		Add Revision

Same icons for previewing, deleting and entitling that you are accustomed to

From this Screen, selecting the **ADD NEW FORM** on the left showing you the following:

Create New Vendor Form

Form Name

Does this form require a royalty fee?

Per Form Royalty Fee

Form Category

Effective Date

PDF Upload

Custom Sequential Numbering Required?

DCAP Equivalent

Comments

Does this form require a contract number?

Can this form be signed?

Family

Revision Number

Form Status

Manual Delivery Only - Customization Required?

Form Difficulty Level

Is this form replacing existing form?

CDK Form Status

CDK Form Comments

Do you want to set the price for this form?

Form Price

Available in eForm Platform

Manufacturer

Revision Date

Form Certified

Vendor Reserved

Form Description

Class

CDK Contract Number

SUBMIT

The form properties screen has been expanded to 3 columns for greater ease of use, but the properties are the same as you are accustomed to. Once you have filled these out and uploaded the PDF, simply click **SUBMIT** to complete the addition.

Question #7—(for Vendors) How do I Delete New Forms to my Portfolio?or Purchase?

To Delete a form, from the Form List Screen select the  from the icons on the right:

Form Name	Form ID	CDK Item #	Catalog #	Revision Date	State	Form Category	CDK Status	Actions	Add New Revision
 Annexe - communication anti-pourriel	59306	9499901	Annexe - communication anti-pourriel (09095901)	04/10/2017	QC	Dealer	Available - Design	   	 Add Revision

You will see the following Deletion form where you can set the expiration date and other options, and complete the process with 

Please select the expiration date (if necessary) beyond which the form will be invalid. Click SUBMIT if you wish to request form deletion. Otherwise, click CANCEL to return to previous page.

Form Name
ANTIROUILLE

Select Form Expiration Date
 

Should this form remain available until the expiration date?
☐

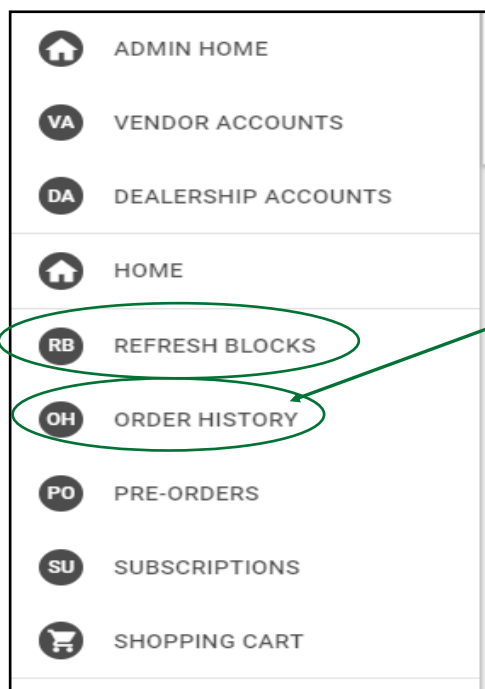
 

Question #8—How do I add new blocks to my Forms which require them (i.e. LAW forms)?

** **Please note**, these change to the eForms Library will not impact the Auto-Replenishment. If you have signed up for the auto-replenishment of form blocks, this should continue to work normally.*

After logging in to your account, you will see new links to **RB** REFRESH BLOCKS and **OH** ORDER HISTORY on the left.

The resulting view is similar for both links; a list of forms owned by your dealership. **Order History** will display all forms that your dealership has ordered, while **Refresh Blocks** will display only forms that require blocks. You can Refresh form blocks from either view.



CNumber		Filter		Value	SEARCH	RESET
Status	CNumber	Vendor Name	Form ID	Form Name	Form Catalog #	Logons
	C159719	LAW FORMS (R&R)	29935	LAW Universal Agreement to Furnish Insurance Policy	228-RS-U-EPS 0313	CHD-FI
	C105485	WATDA	37817	MOTOR VEHICLE LEASE ORDER	#13BLAZ	MICHELLE-FI

Form Information

Vendor Name
98010000 ADP GENERIC DEALER

Form Name
Buyers Guide 1

Catalog Number
16 C.F.R. 455

Revision Date
unknown

Status
Active Form

Dealer Information

CNumber
C129201

Global Install
No

Block Size
5

Logons ⓘ
81-FI
90-FI
ADP-FI
AR-FI
BABS-FI
CA-FI
CHRY-FI
CO-FI
ECON-FI
EFORMS-FI

Subscription Fee
\$0.00 for 5 forms

SUBMIT

Selecting the icon on the right will display the Refresh Order screen.

1. Select a value for CNumber if more than one option is given.

2. Select one or more Logons that you wish to supplied blocks to.

3. Press **SUBMIT** to complete the block order.