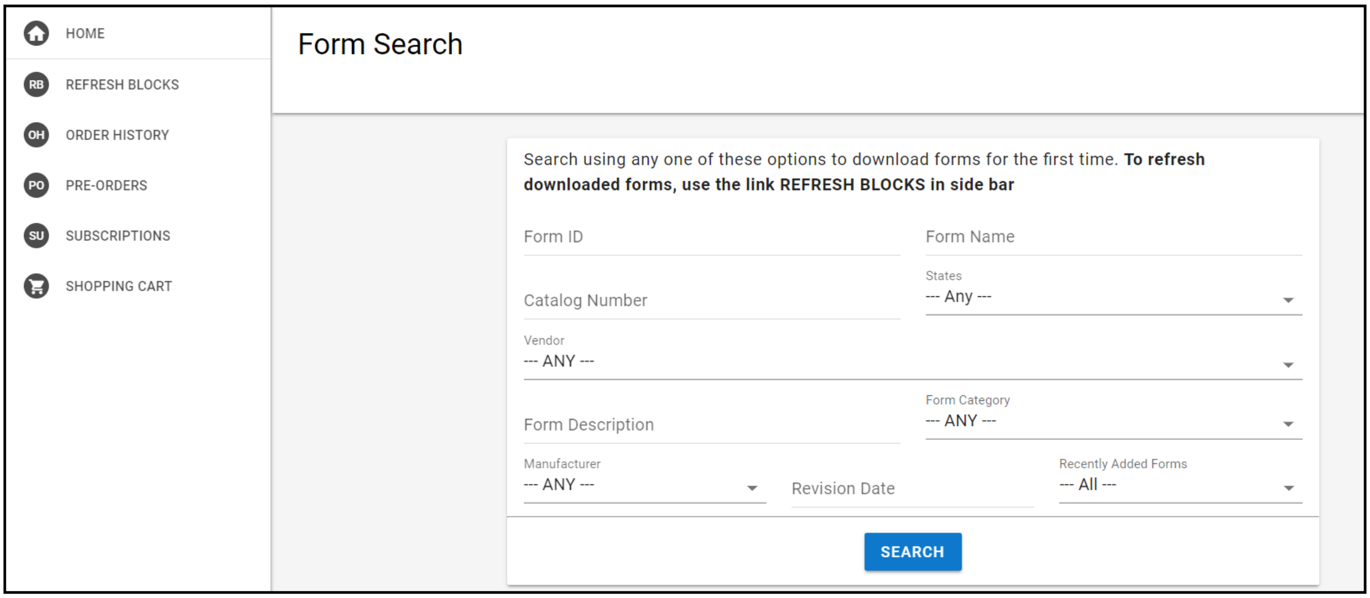
The CDK eForms Library "Look and Feel"

Frequently Asked Questions



Updated February 5, 2019

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

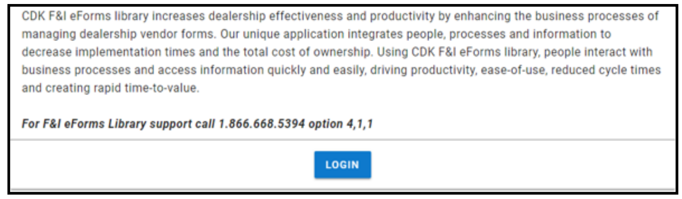
The F&I eForms Library has a whole new look! We are updating the appearance of our library to a new modern style that we hope you will find cleaner and easier to navigate. None of the functions or data in the library have changed; these changes are strictly cosmetic.

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.

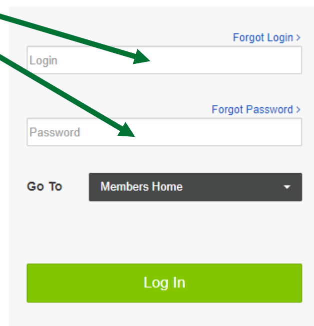
Question #3—How do I login?

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.

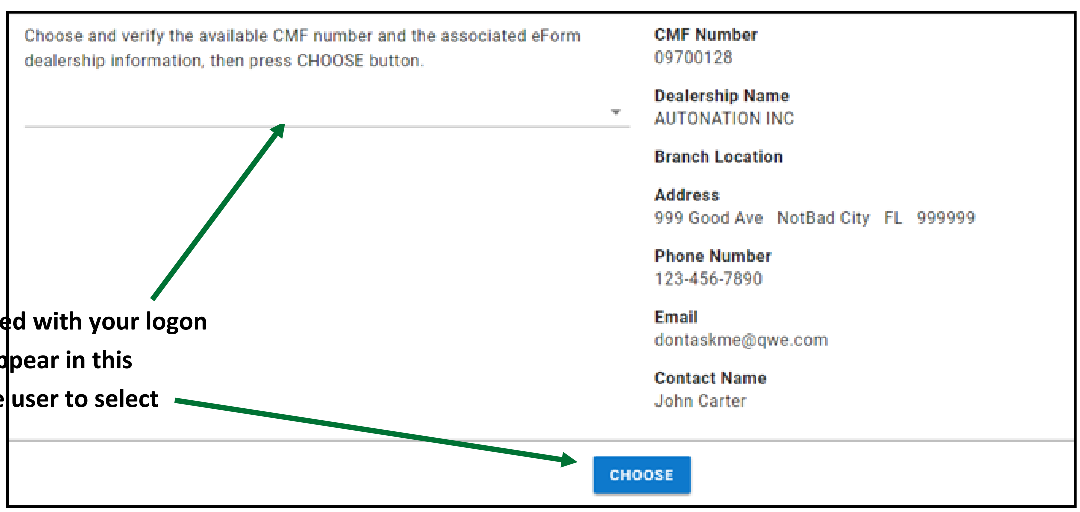


Enter Login Name and Password
***Note: Both Login Name and Passwords are case sensitive.**

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



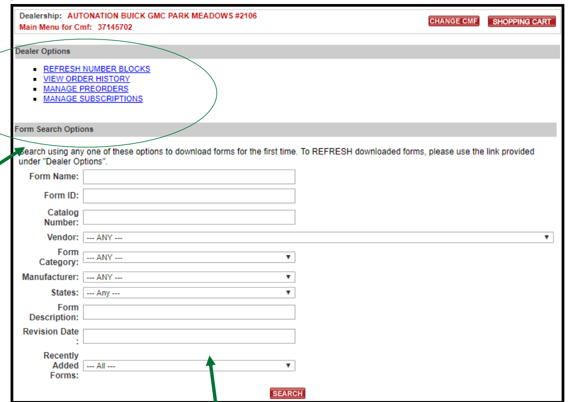
...then select a CMF if more then one is listed. If your dealership owns more than one location, you may see several CMF Numbers to choose from. The dealership information on the right will change to match each selection. Select your location and press **CHOOSE**.



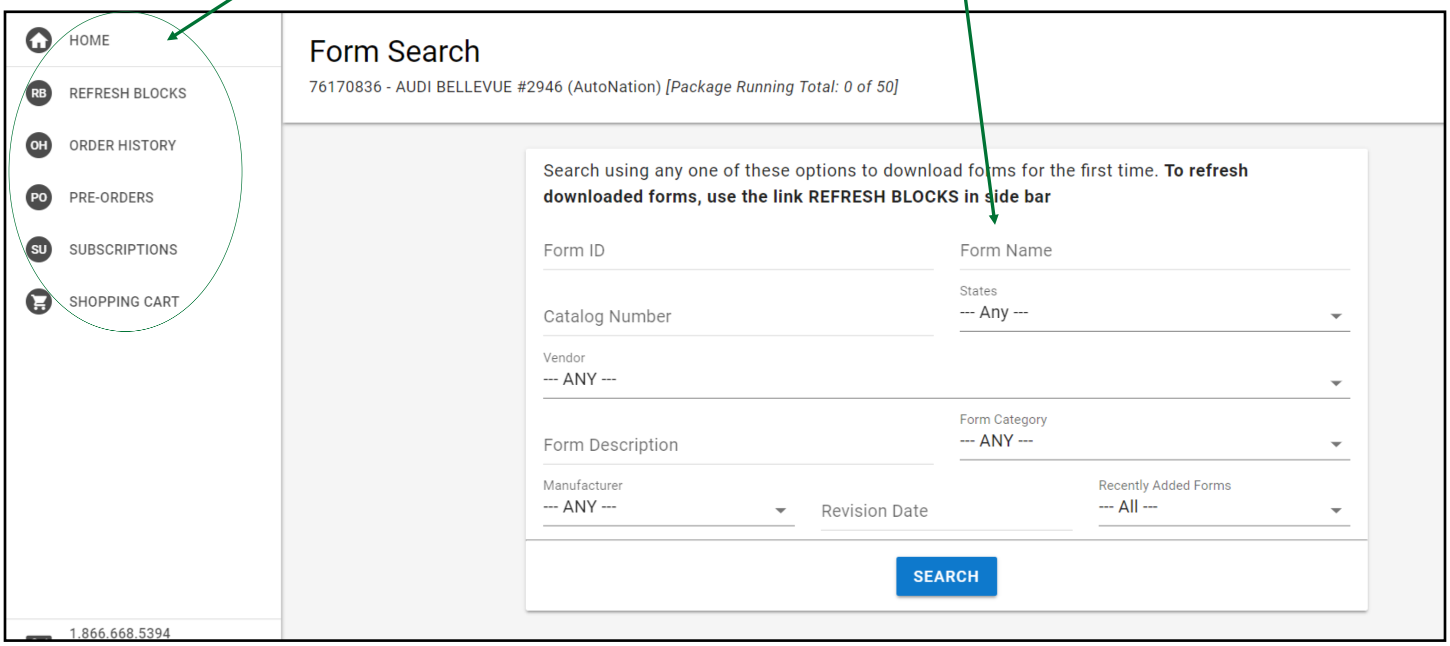
All CMFs associated with your logon name used will appear in this dropdown for the user to select

Question #4 How Do I Order new Forms?

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



And the new!



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:

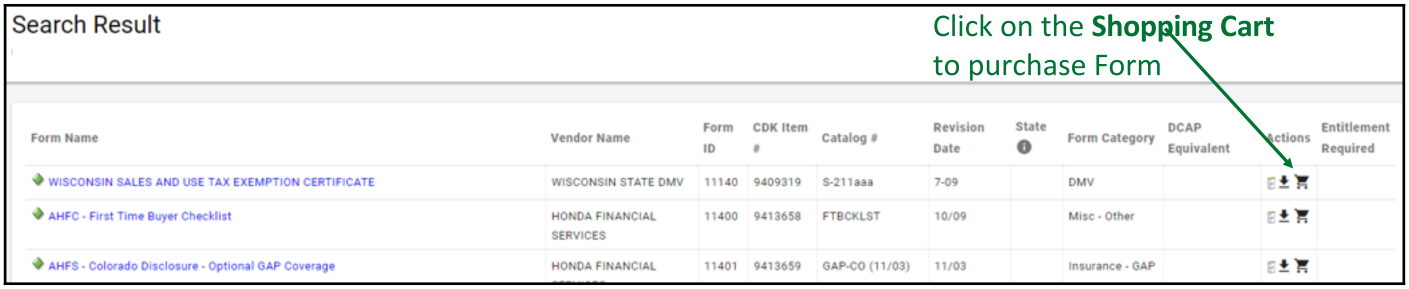
Form Name	Vendor Name	Form ID	CDK Item #	Catalog #	Revision Date	State	Form Category	DCAP Equivalent	Actions	Entitlement Required
LAW GA-ARB Retail Installment Sale Contract Simple Finance Charge	LAW FORMS (R&R)	45164	9418301	553-GA-ARB-eps-14 9/15	9/15		LAW Contract Agreements			

Rows per page: 20 1 - 1 of 1

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

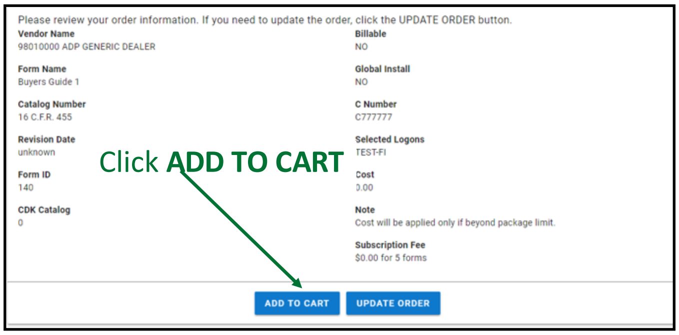
Then to complete the order….

1. Use the Shopping Cart Icon



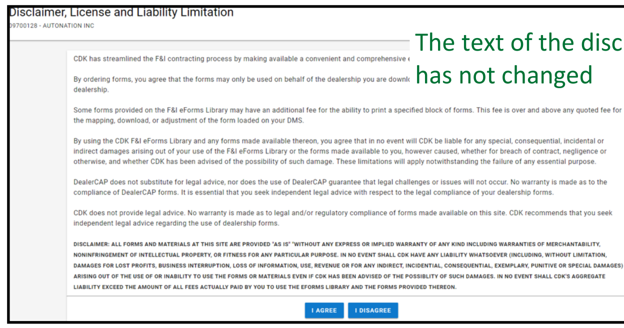
Click on the **Shopping Cart** to purchase Form

2. View the Form Information-



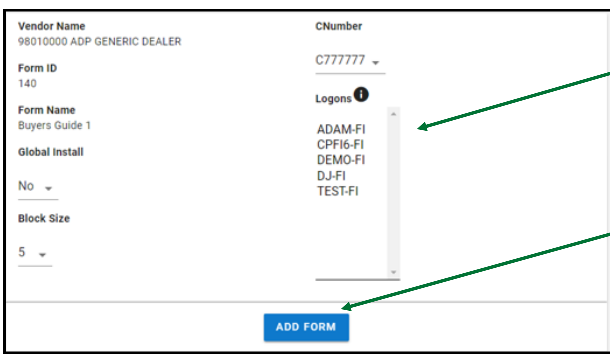
Click **ADD TO CART**

3. Agree to the Disclaimer-



The text of the disclaimer has not changed

4. Select One or More logons-

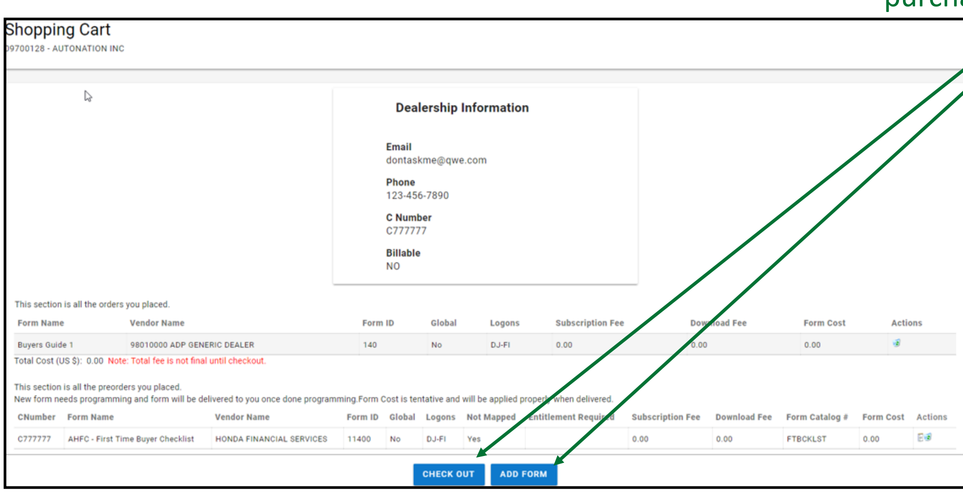


Select one or more logons from the list. These logons will be able to print the form being purchased.

Then Click **ADD FORM**

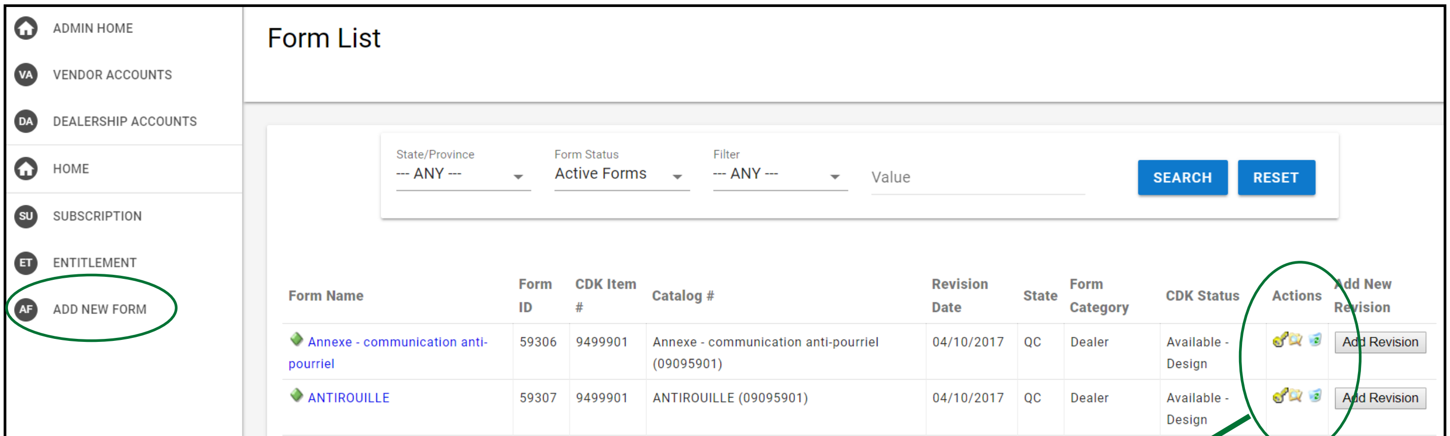
Select **CHECK OUT** to complete the order, or **ADD FORM** to purchase additional forms.

5. …And Check Out



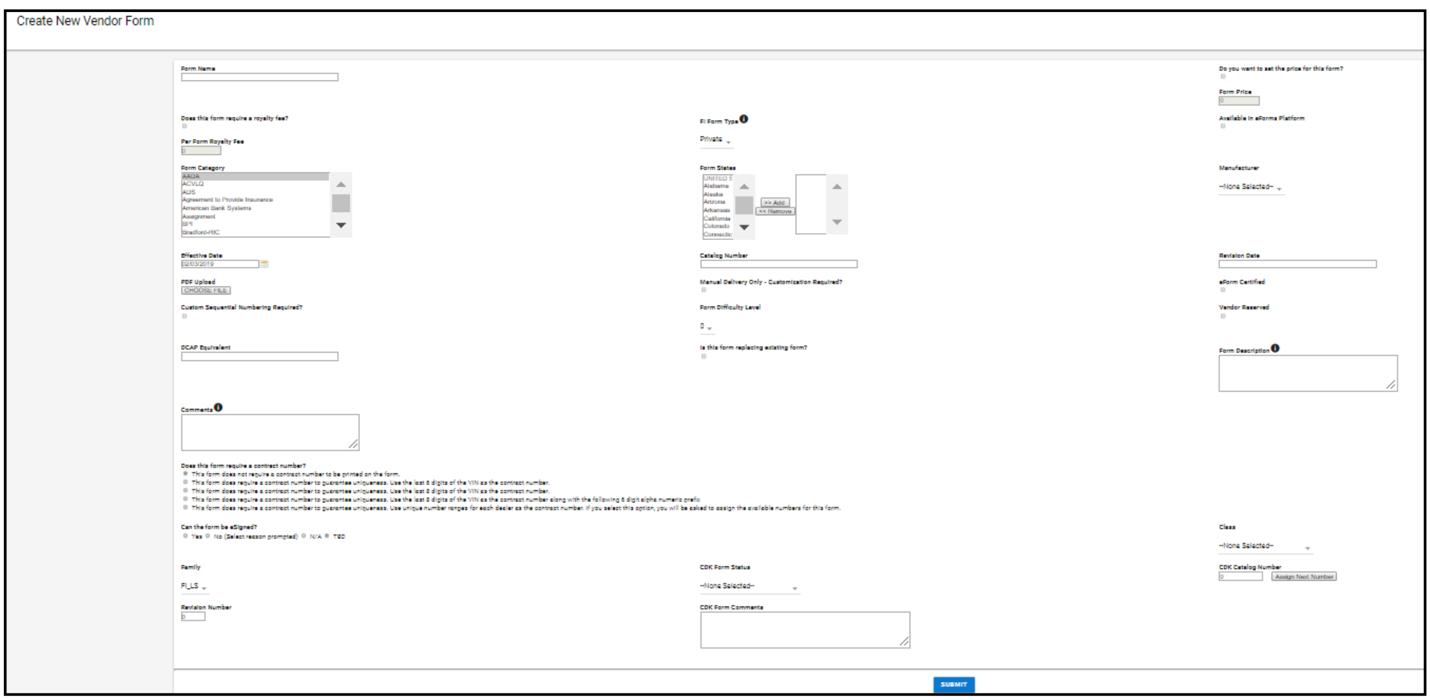
Question #6—(for Vendors) How do I Add New Forms to my Portfolio for Purchase?

Your existing form portfolio will look like:



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

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



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 SUBMIT

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

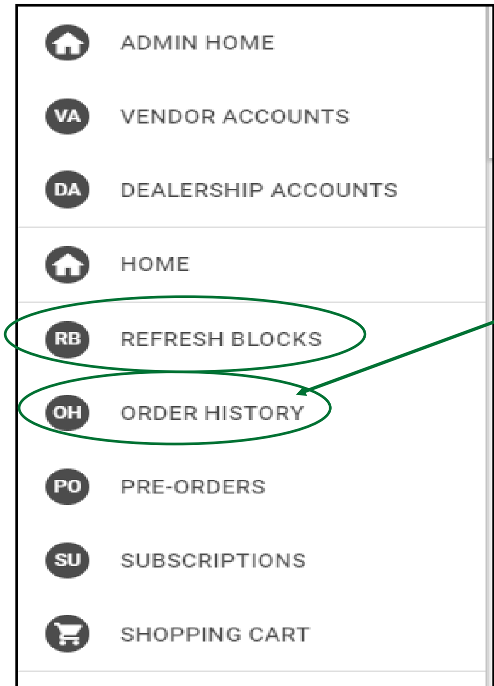
Select Form Expiration Date
02/04/2019

Should this form remain available until the expiration date?

SUBMIT CANCEL

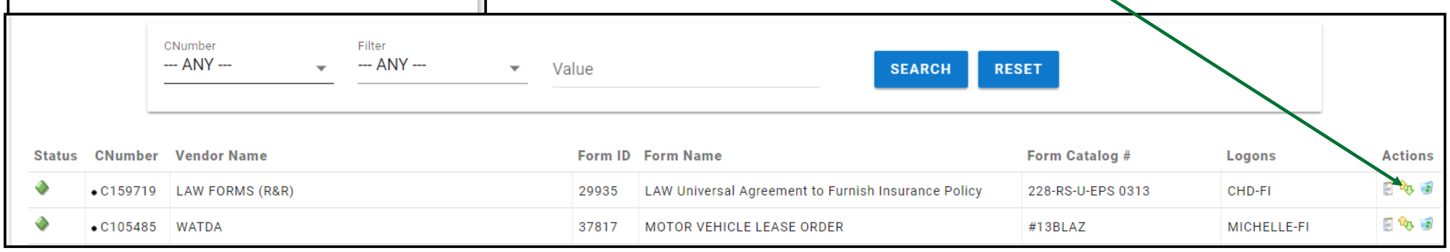
Question #8—How do I add new blocks to my Forms which require them (i.e. LAW forms)?

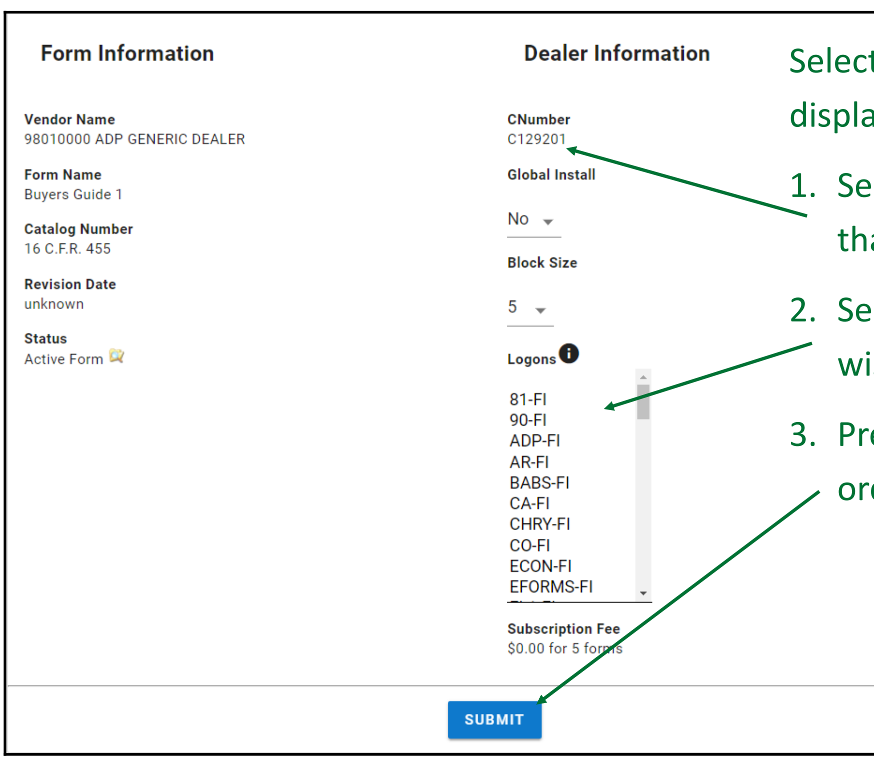
** **Please note**, these change to the eForms Library <u>will not</u> impact the Auto-Replenishment. If you have signed up for the auto-replenishment of form blocks, this should continue to work normally.*



After logging in to you 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.





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.