



# Customer Care Quick Start Guide

CDK Customer Care wants to make your support process seamless and efficient by providing a variety of support options at your fingertips. This guide is designed to give you an in-depth look at the types of assistance available, which option best fits your need and provide best practices to ensure the fastest resolution to your query. Use the links to get more information about a particular area.

## CDK CUSTOMER CARE OPTIONS

All options below are available through the Customer Care Portal (in Unify) except direct dial phone support. The Ask CDK icon in the portal is the fastest way to access the help options. Once you've chosen Ask CDK, begin a search by using the Digital Assistant. If additional support is needed, select Chat With an Agent, or Start a Call. An online case can be submitted for lower priority queries. For more information, reference the [Customer Care Portal Overview](#).

TYPE	SUPPORT OPTION	WHERE TO FIND IT	URGENCY	TIPS FOR SUCCESS	AVAILABILITY
Self-Service	Knowledge Base Search	Search Bar	All	Reference function codes and specific terminology whenever possible.	24x7
	Digital Assistant	Ask CDK			
Direct Agent Support	Chat With an Agent	Ask CDK	All	Stay engaged with the agent to avoid chat being closed due to inactivity.	<a href="#">During Weekday Support Hours</a>
	Start a Call	Ask CDK	Medium/High	Provide a direct dial phone number.	<a href="#">During Support Hours</a>
	Place a Call	Direct Dial via Phone		Use the Queue Call Back option if wait times are longer than expected.	
Create an Online Case	Submit a Case	Ask CDK	Low	Update comments and upload files for more detail. Be available for agent follow-up.	24x7
		Submit a Case Menu			

## Using the Customer Care Portal in CDK Unify

You can access the Customer Care Portal from CDK Unify, our new cloud-based point of entry (available [HERE](#)), and easily log in with your Simple ID. Learn more about upgrading to CDK Unify using the [Unify Content Kit](#), [CDK University](#) and [Unify Online Help](#). Customers can request to migrate to Simple ID by contacting [simpleidmigration@cdk.com](mailto:simpleidmigration@cdk.com).

The [Customer Care Portal](#) appears as a tile in CDK Unify. Customers using CRM can also access the Customer Care Portal by selecting the CDK Care option, available under Support in the navigation panel. (Not available for those with federated SSO.) Please note: CDK Unify will be the primary access point for Customer Support going forward. All cases in Service Connect will be accessible in the new Customer Care Portal once you migrate to CDK Unify.

# Customer Care Support Options

## USING THE CUSTOMER CARE PORTAL:

### ASK CDK

- Immediate 24x7 self-help and access to agent assisted support\*
- Enter a query and your application area to receive relevant content
- If additional support is needed, select from one of the options



### CHAT WITH AN AGENT\*

Convenient, live agent response for all topics and levels of urgency



### SUBMIT A CALL\*

In-depth direct discussion with an agent for a higher urgency topic



### SUBMIT A CASE

24x7 online case submissions for less urgent topics

### SUBMIT A CASE MENU

Enter an online case using the Submit a Case menu



### SUBMIT A CASE

24x7 online case submissions for less urgent topics

### USE YOUR PHONE TO CONTACT CUSTOMER CARE



### PLACE A CALL\*

In-depth direct discussion with an agent for higher urgency topics

#### AUTOMOTIVE/HEAVY TRUCK

866.668.5394

#### CRM

877.859.0195

#### RETAIL SUPPORT

800.755.7355

## Customer Care Support Engagement

For more information on how to use each of the support options, refer to Customer Care Support Engagement.

## For Urgent Issues

### USE THE FOLLOWING METHODS TO ESCALATE URGENT ISSUES:

- Call Support directly with any urgent issue that is disrupting your operations. If there is an existing case number, be sure to reference it and ask to escalate the case. If your system is down, select System Down from the menu. For Automotive and Heavy Truck, dial 866.668.5394. For CRM, dial 877.859.0195. For Retail Support, dial 800.755.7355.
- You can request to escalate it through the Customer Care Portal by selecting the Escalate button on the case. This button will appear only if the case has remained opened for more than 48 hours.
- If you still require extra assistance, reach out to your Inside Account Manager (IAM). If you do not have an IAM or do not know who they are, reach out to your Account Sales Executive (ASE).

\* **Direct agent support** options are available only during support hours.

# Best Practices and Tips for Fastest Query Resolution

## CASE MANAGEMENT PROCESS:

- A case will be opened or updated each time you contact Support.
- You can find existing cases with their current status in the Customer Care Portal.
- Always provide as many details about your case as possible, such as error messages, the action or activity involved in creating the result or files, such as screenshares.
  - Upload files or add comments to the case using the Comments button.
  - You can also upload files using Upload Files under the Knowledge and Files tab in the case.
  - When creating a case using the Submit a Case menu, once the case is submitted, a confirmation message will appear. Select Upload Files or Case Details in this message to add files or comments.
- If you are following up on an existing case with Support, always reference your existing case number to avoid duplicate cases for the same query.
  - If you are viewing a specific open case in the portal and select Ask CDK, the chatbot will ask if you require further assistance with that specific case. You can then choose if you want to Chat With an Agent or Submit a Call.
  - You can also enter your case number in the Digital Assistant Subject field. The system will know you are following up on that case and route your request accordingly.
- A case will be closed when the query is resolved or if Support is unable to reach the case contact after repeated attempts.

## Self-Service Options: Searches

For the most accurate search results, reference function codes and specific terminology whenever possible.

## Direct Agent Support

### CHAT WITH AN AGENT (ASK CDK)

- Be sure to stay engaged with the agent. Chats will be closed after several minutes of inactivity.

### PLACE A CALL (DIRECT DIAL)

- Refer to the [Direct Agent Support](#) phone tree to reach the desired team.
- If wait times are longer than expected, select the In Queue Callback option to receive a call when you are next in line for assistance.

### SUBMIT A CALL (ASK CDK)

- When submitting a call through Ask CDK, always provide a direct dial number, such as your mobile. Do not provide a number that goes through a telephony system, such as your dealership number.
- The system will call you back immediately to confirm they can reach you directly. Select 1 to confirm. The agent will join the call when you are first in queue.

## Submitting Online Cases

- Submit an online case when you have lower priority queries, such as how-to questions or adding users.
- Online cases will have a slower response time than live chat or phone support.
- A Support agent will likely reach out to you for more information when addressing your case. Please try to be available for their outreach to avoid any delay to your resolution. Your case will be closed if Support cannot reach you after multiple attempts.