Click any of the questions below and you will be taken to the page with the answer.

- I want to receive automated notifications regarding credits I have requested, what do I need to do?
- How do I sign up for ePay?
- Why am I prompted to register when I try to view my open cases from the Contact Us link?
- Who do I call with questions?
- Why doesn’t my ePayment reflect on my paper invoice?
- Where do I send my payments or correspondence?
- When will I see my payment or credit?
- How do I dispute an invoice or part of an invoice?
- How long does it take to dispute an invoice?
- How will I know if my dispute is resolved?
- What does Credit Memo Complete mean?
- Why is the Customer Search screen of CDK Online Invoice Management blank?
- What version of MS Excel will I need to be able to export my Invoice details?
- How do I export my invoice into Excel?
- Can I still look at my invoice the same way if I choose to go paperless?
- How do I clear out my transaction list?
- How do I add or delete checking accounts?
- How do I make a partial payment?
- What is the overnight mailing address for my payment?
- How do I follow-up on Forms & Supply returns?
- Sometimes while trying to connect to CDK Online Invoice Management I get the error message, 404 Page Not Found. Other times it works correctly.
- I was working in the CDK Online Invoice Management, but stepped away for about 30 minutes. When I returned I was at the DealerSuite logon page. What Happened?
- When I am in CDK Online Invoice Management, there is an icon at the bottom of my window that looks an eye and a red circle. What does it mean?
- How do I add cdkglobal.com as a trusted site?
- How do I add an attachment for my Account Specialist to see?
- There is a credit balance in “Open Payments” that doesn’t match any payments made. Why?
- Is training available to help me understand the roles as a user in Online Invoice Management?
- Am I able to access Online Invoice Management on CDK Drive?
- I receive an error message when accessing Online Invoice Management through w.e.b.Suite. Why?
• I want to receive automated notifications regarding credits I have requested. What do I need to do?

Automated notifications regarding credit requests will be sent to you via email from CDK. Email settings will need to be set to accept email from @cdk.com. Management of your email settings may be handled by the Dealership’s Dealer Administrator, IT or the individual user.

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• How do I sign up for ePay?

Go to cdkglobal.com, click Login. From the Member’s Home page under Online Invoice Management click the ‘sign up here’ link. You can sign up for ePay, Paperless billing, Flat Rate billing, or Balance Forward billing. And if you are not already signed up for Online Invoice Management you can sign up by clicking the same link.

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• Why am I prompted to register when I try to view my open cases from the Contact Us link?

This will occur when the Support Solutions feature has not been activated on your DealerSuite login. To resolve this you can contact technical support at 877.483.9171, option 3; or by submitting a case via the Contact Us link.

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• Who do I call with questions?

From any of the CDK Online Invoice Management screens, simply click on the “Contact Us” link, which will list your Accounting Specialist and phone number, technical support phone number and the option to contact us electronically.

You can use one of these contact options listed in the “Contact Us” section. Your Account Specialist can assist you with payment questions, invoice questions, credit request status, or submitting a credit request electronically. Our technical support associates can assist you with login, profile setups, email maintenance, or connectivity related questions.

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• Why doesn’t my epayment reflect on my paper invoice?

While CDK does bill monthly, there are certain internal dates that must be met to ensure billing goes out in a timely manner. As long as your payment posts by the due date, which is the 10th of each month, your payment will be reflected on the following months invoice. Real time postings are available through OIM.

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• Where do I send my payments or correspondence?
  ePayments are available with CDK’s Online Invoice Management, you just need to sign up for this free feature from the DealerSuite home page. Payments should be mailed to the CDK address listed on the remittance stub of your invoice.
  Inquiries and correspondence should be emailed to DS.BillingService.Notifications@cdk.com, or by faxing your request to 847.620.2563. Company letterhead or company.com email addresses are required.
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• When will I see my payment or credit?
  Payments should be posted the day they are received at the bank. Credits will be posted to your account as soon as they are approved. Credit status and ePayments are viewable immediately.
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• How do I dispute an Invoice or part of an Invoice?
  An electronic dispute of an invoice can be submitted by following these steps:
  1. From the CDK Online Invoice Management screen, click the Account details tab, select the transaction that you wish to dispute.
  2. Click the Dispute button.
  3. Select the Reason for the Dispute, click Next.
  4. Select the quantity or amount you wish to Dispute, click Next.
  5. Enter comments with Dispute details, click Next.
  6. Review Credit Request, click Submit.
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• How long does it take to dispute an invoice?
  Once the dispute has been submitted, it is electronically transmitted to your CDK Account Specialist real-time. Contact should be received within 24-48 hours. The Account Specialist will receive the notification that you have submitted a dispute and begin researching the data. Approval or rejection time of the dispute will vary based on the research required by the Account Specialist.
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• How will I know if my dispute is resolved?
  Once the Account Specialist has completed researching the dispute and an approval is granted, you will receive an email notification of the approval (or rejection).
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• What does Credit Memo Complete mean?
  Credit Memo complete is the status of a credit request (dispute) that was submitted on your account, which has been approved and posted to your account. The amount of the completed credit memo will reduce the balance of the invoice that the credit was applied to.
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Why is the Customer Search screen of CDK Online Invoice Management blank?
Customer search screen is used for Dealerships that have multiple CMFs (Client Master File account numbers). In order to display the CMF numbers that you have access to, enter the % in the blank tab and then click Go.

What version of MS Excel will I need to be able to export my Invoice details?
The CDK Online Invoice Management screens exports are certified with Microsoft Excel 2003 or higher.

How do I export my invoice into MS Excel?
From the Detail tab, click your invoice; select the Export Transaction Invoice or Export Consolidated Invoice button to export the data. The file format is friendly and easy to use to allow for filtering and sorting.

Can I still look at my invoice the same way if I choose to go paperless?
Even though you have chosen to opt out of paper you can still view and print your invoice by selecting the consolidated invoice print button. This will open a PDF of your invoice in the standard format.

How do I clear out my transaction list?
The entire transaction list can be cleared by clicking the button. If you only wish to remove specific transactions use the remove option.

How do I add or delete checking accounts?
To add a checking account: Once transactions have been identified, click the button. When the new screen populates, click the button. Under payment method, choose add a new Bank account. Select account type, enter your routing and account number in the appropriate boxes, select validate account, enter account holders name.

To delete/deactivate a checking account: From the Summary page click the link. The deactivate account screen will populate, select the account(s) you would like deactivated and click save.
• **How do I make a partial payment?**
  Once the invoice you would like to pay is selected, hit the Pay option and go to advanced payment. Enter the amount you would like to pay and click Recalculate, confirm the amount, enter reason for the partial payment and click apply.

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• **What is the overnight mailing address for my payment?**
  Sign up for ePayments or overnight to:
  - **U.S customers:**
    - JP Morgan Chase, 131 S. Dearborn, 6th Floor, Lockbox # 88921, Chicago, IL 60603
  - **Canadian customers:**
    - JP Morgan Lockbox 1592, Royal Bank Plaza, South Tower, 200 Bay Street, Suite 1800, Toronto, Ontario M5J 2J2

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• **How do I follow-up on Forms & Supply returns?**
  Contact SRC (Standard Register Corporation) at 800.237.2372. Or your Account Specialist via the Contact Us link.

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• **Sometimes while trying to connect to CDK Online Invoice Management I get the error message, 404 Page Not Found. Other times it works correctly.**
  When you click on CDK Online Invoice Management, DealerSuite begins the process of logging you into CDK Online Invoice Management. If there is a delay or a problem connecting to the system, you will get the error 404 Page Not Found. If you try a couple of times and are unsuccessful, contact CDK support for assistance.

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• **I was working in the CDK Online Invoice Management, but stepped away for about 30 minutes. When I returned I was at the DealerSuite logon page. What happened?**
  If you leave your CDK Online Invoice Management window open for more than 30 minutes without any activity, your session will time out for security purposes. If this happens you will simply need to log back in.

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• **When I am in CDK Online Invoice Management, there is an icon at the bottom of my window that looks like an eye and a red circle. What does it mean?**
  ![Internet](image)
  This symbol appears in your Internet Explorer status bar when you visit a website that does not meet your privacy preferences. It indicates that some cookies were restricted or blocked by Internet Explorer. Although cookies can be created and used by web software, DealerSuite does not utilize cookies; therefore it will not affect the way the software performs. If you would like to eliminate the Privacy Setting icon you can add cdkglobal.com as a trusted site.

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• **How do I add cdkglobal.com as a trusted site?**
  From your Internet Explorer menu, click **Tools**, and then **Internet Options**. From **Internet Options**, click the **Privacy** tab, then click **Sites**. In the **Address of website** field, enter **cdkglobal.com**, then click **Allow** and click **OK** to save.

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• **How do I add an attachment for my Account Specialist to see?**
  From the Detail tab of your account, you can add any type of attachment for your Account Specialist to view. These steps will also allow you to view attachments that your Account Specialist has attached to your account for you to view.

  1. Select the Transaction number that you want to add an attachment to.
  2. Click the Activities button.
  3. Click the Add or View* button under Attachments.
  4. Complete the required fields for adding an Attachment.
  5. Click Add Another or Apply.

  *Note: The View button will not be there if no previous attachments.

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• **There is a credit balance in “Open Payments” that doesn’t match payments made. Why?**
  Simply click on the amount in question for details as to what the credit amount is for.

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• **Is training available to help me understand the roles as a user in Online Invoice Management?**
  Yes, there are three courses available for Online Invoice Management:

  - **Online Invoice Management – Getting Started**
    1 hour: Learn how to get started using OIM.
  - **Online Invoice Management – Advanced User Administration**
    1 hour: Learn the OIM user roles and how to add or remove users.
  - **Online Invoice Management – ePay**
    20 minutes: Explore paying CDK invoices electronically with OIM using ePay.

  **To access training follow these instructions:**
  1. Go to [cdkuniversity.com](http://cdkuniversity.com)
  2. If you don’t already have a Username and Password, click New User Registration.
  3. Or, enter your log in information and click ‘Login’
  4. From the ‘Home’ drop down menu click Learning.
  5. In the Find Learning tile, type in the course title you are interested in and click Go.
  6. Once you find the course you are looking for you can begin your learning.

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• Am I able to access Online Invoice Management through CDK Drive?
Not at this time. You can access Online Invoice Management from cdkglobal.com > Login. (The login link is at the top right.)

• I receive an error message when accessing Online Invoice Management through w.e.b.Suite. Why?
This error will appear until the Java script is updated. Please access Online Invoice Management from cdkglobal.com > Login. (The login link is at the top right.)

If you receive the error:
1. Exit out of the internet browser page and exit the debugger.
2. Login directly into cdkglobal.com, and click Login to access CDK Online Invoice Management using the Internet Explorer browser instead of navigating via w.e.b.Suite. This is a temporary work around.

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