

Single Sign On and Multi-Factor Authentication

User Guide

Version 5.0

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CONNECTIONS THAT MOVE YOU

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Product Intended Use

The new Elead CRM Single Sign On (SSO) login and multi-factor authentication (MFA) to provide the security and convenience that dealerships count on from Elead CRM. Our new SSO and MFA solution combats data breaches, weak passwords and phishing attacks.

Single Sign On (SSO) is an authentication method that lets users log in to any of CDK's several related, yet independent, software systems with a single sign on ID and password. With SSO, you no longer need to remember multiple passwords, eliminating password fatigue.

Multi-Factor Authentication (MFA) uses your mobile phone, email or Okta app as an additional authentication step to verify a user's identity and safely log into the system making your CDK applications, dealership and user accounts even more protected.

Manual Intended Use

This manual is intended for use as a source of instructional information required to create an SSO account, configure MFA Authentication methods and log in to the Elead CRM using SSO and MFA.

Manual Intended Audience

This guide is intended for use by all Elead CRM users.

Contact Information

For additional information contact: support@cdk.com

Create Single Sign On (SSO) account

Log in to the Elead system as usual. The Sign In button redirects you to a new sign in page that begins the SSO account creation process.

Single Sign On (SSO)

Don't have an SSO account yet? [Sign Up ?](#) **1**

OR

☐ Remember This

.....

[Forgot your password?](#)

Sign In

Sign up for SSO

Make your CRM account even more secure.
Please login to the CRM using your existing username & password.

Username **2**

Password

Sign In **3**

2 Enter your Elead CRM credentials.

3 Press **Sign In**. The SSO wizard initiates.

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Figure 1: SSO/MFA Sign Up Wizard Initiated

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Create Single Sign On (SSO) account cont'd

Begin new SSO sign up Process

The verification email is sent.

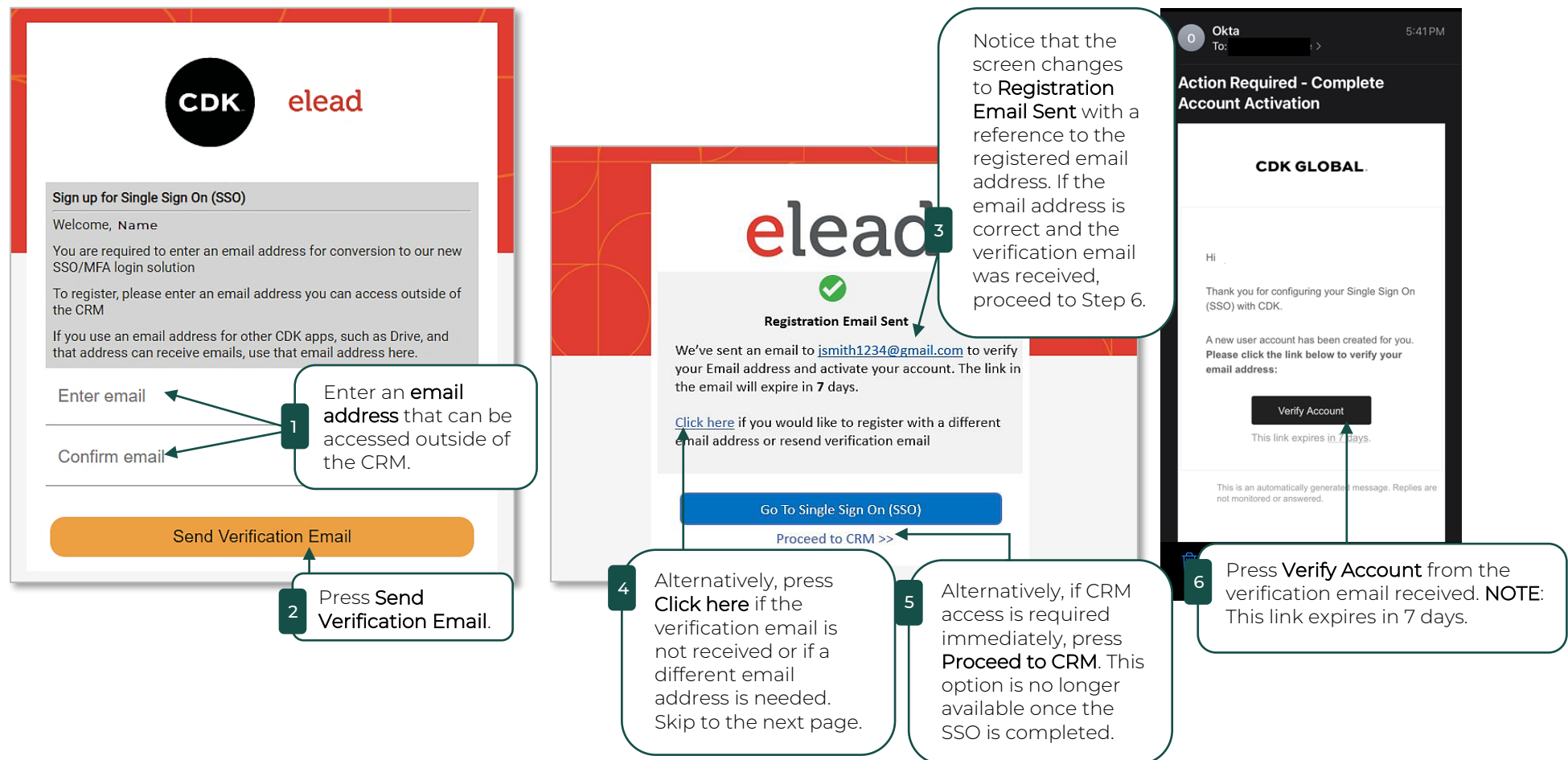


Figure 2: Sign Up with Email Account

NOTE: If Proceed to CRM option is used, registration must still be completed at some point to ensure utmost security.

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Create Single Sign On (SSO) account cont'd

Registration Failed Message

If the registration fails for any reason, the Proceed to CRM option is available.

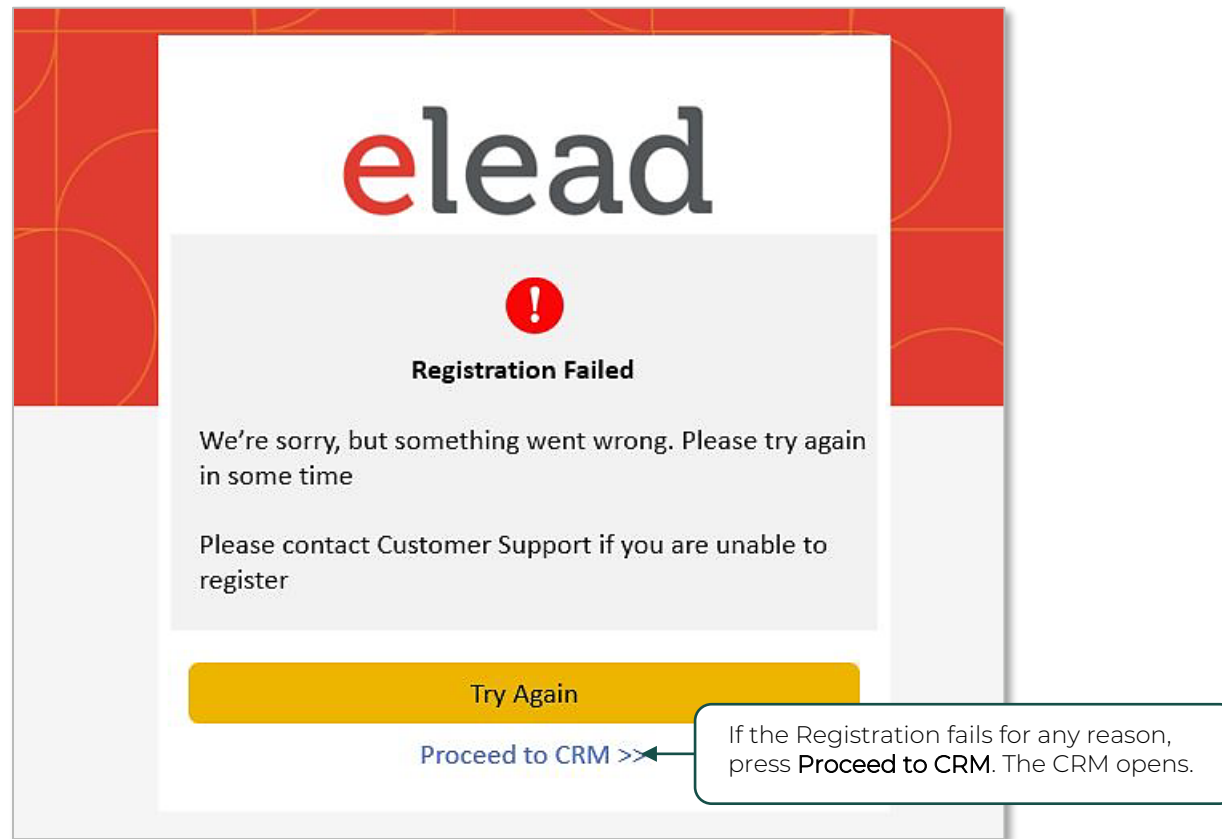


Figure 3: Registration Failed – Proceed to CRM

NOTE: If Proceed to CRM option is used, registration must still be completed at some point to ensure utmost security.

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Create Single Sign On (SSO) account cont'd

Register a Different Email or Resend Verification Email

If there were problems receiving the verification email, you can either resend the verification email to the same email address or register a different email address that you can access outside the CRM. The 'Click here' link from the previous 'Problem Solving' image opens a page where you can do just that. These are alternate steps to resolve any issues experienced with the verification email.

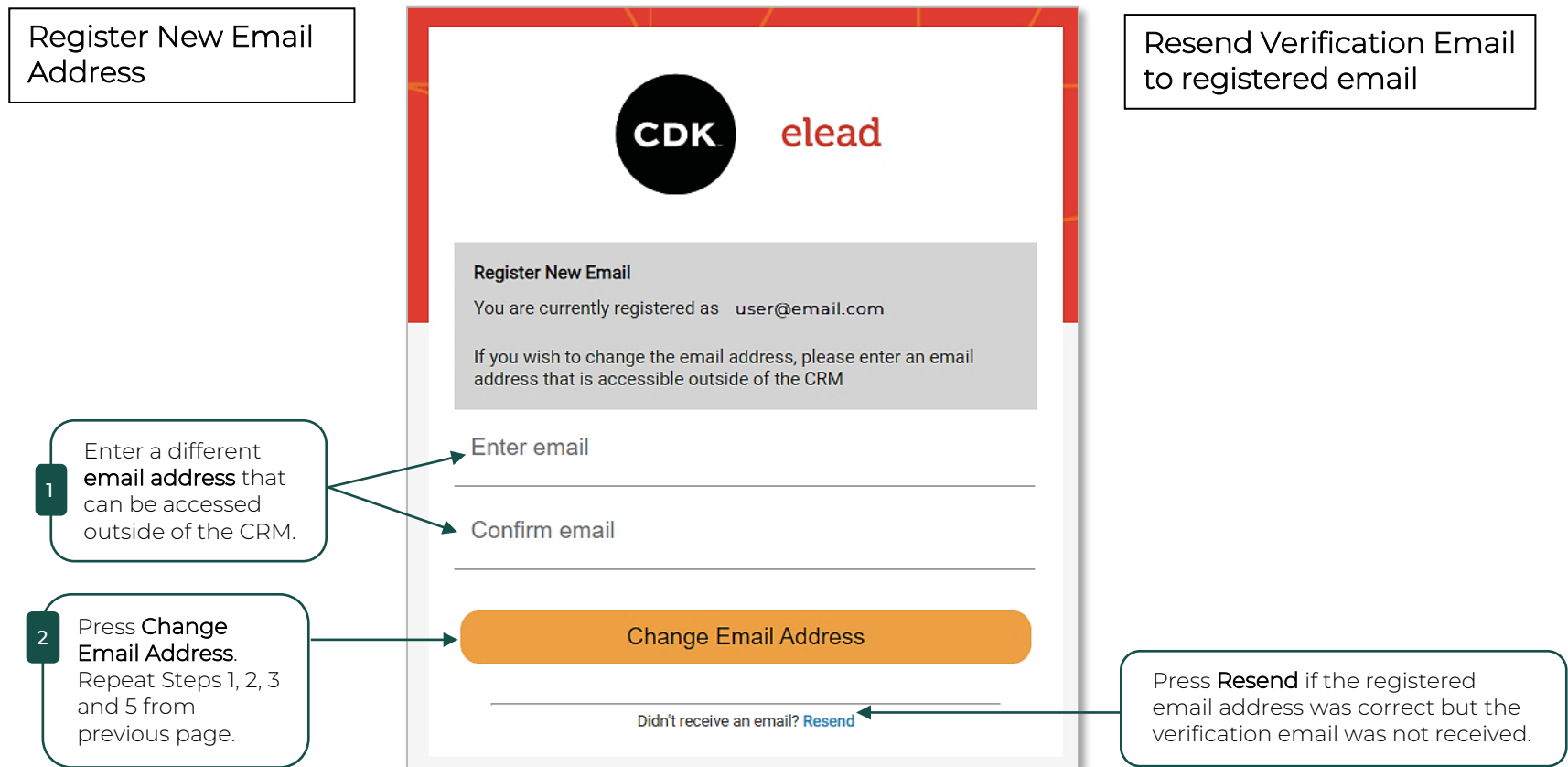


Figure 4: Resend Verification Email or Register Different Email Account

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Create Single Sign On (SSO) account cont'd

Finish creating your Modern-Retailing SSO account

Creating an SSO account requires a new password. Use a strong password since it is not entered every time. The SSO account remembers the password that is set and uses it in the background with other authentication data when logging into the system.

The screenshot shows the 'CDK GLOBAL' logo at the top. Below it, a welcome message reads: 'Welcome to modern-retailing-preprod, (Create your modern-retailing-preprod SSO account)'. The main form area contains the following steps:

- Enter new password**: A text input field. To its right, callout 1 says: 'Enter a new strong password that will be used by your SSO login.'
- Password requirements**: A list of requirements:
 - At least 8 characters
 - A lowercase letter
 - An uppercase letter
 - A number
 - No parts of your username
 - Your password cannot be any of your last 4 passwords
- Repeat new password**: A second text input field. To its right, callout 2 says: 'Enter the new password again.'
- Choose a forgot password question**: A dropdown menu with the selected option 'What is the food you least liked as a child?'. To its right, callout 3 says: 'Choose a forgot password question from the list so that you can reset your password if you forget it.'
- Answer**: A text input field for the answer to the question. To its right, callout 4 says: 'Answer the question selected above.'
- Create My Account**: A button at the bottom right. To its left, callout 5 says: 'Press Create My Account. The SSO account is created. This automatically redirects to the Elead CRM application landing.'

Figure 5: Finish SSO Account Creation

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Set up multifactor authentication (MFA)

Once the SSO account is completed and active, the MFA wizard initiates automatically. The MFA creation wizard has options to set up SMS, email, Okta, Google Authenticator and Biometric authentication. Follow these steps to set up the following authentication options (Google Authenticator and Biometric instructions not included in this document):

- SMS Text
- Email
- Okta

Set Up MFA SMS Text Authentication

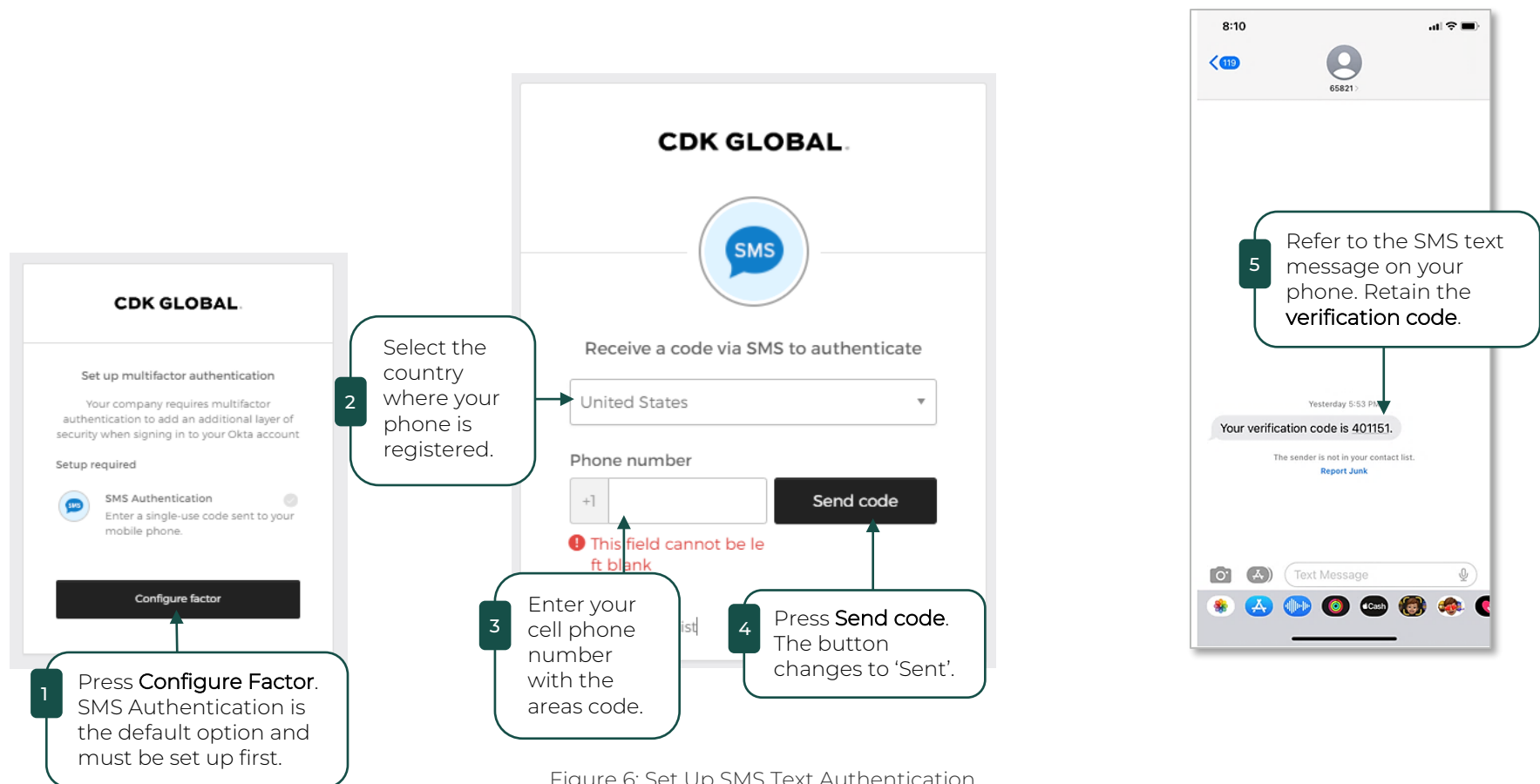


Figure 6: Set Up SMS Text Authentication

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Set up multifactor authentication (MFA) cont'd

Set Up MFA SMS Text Authentication cont'd

SMS Text authentication is a default option and must occur before other options can be configured.

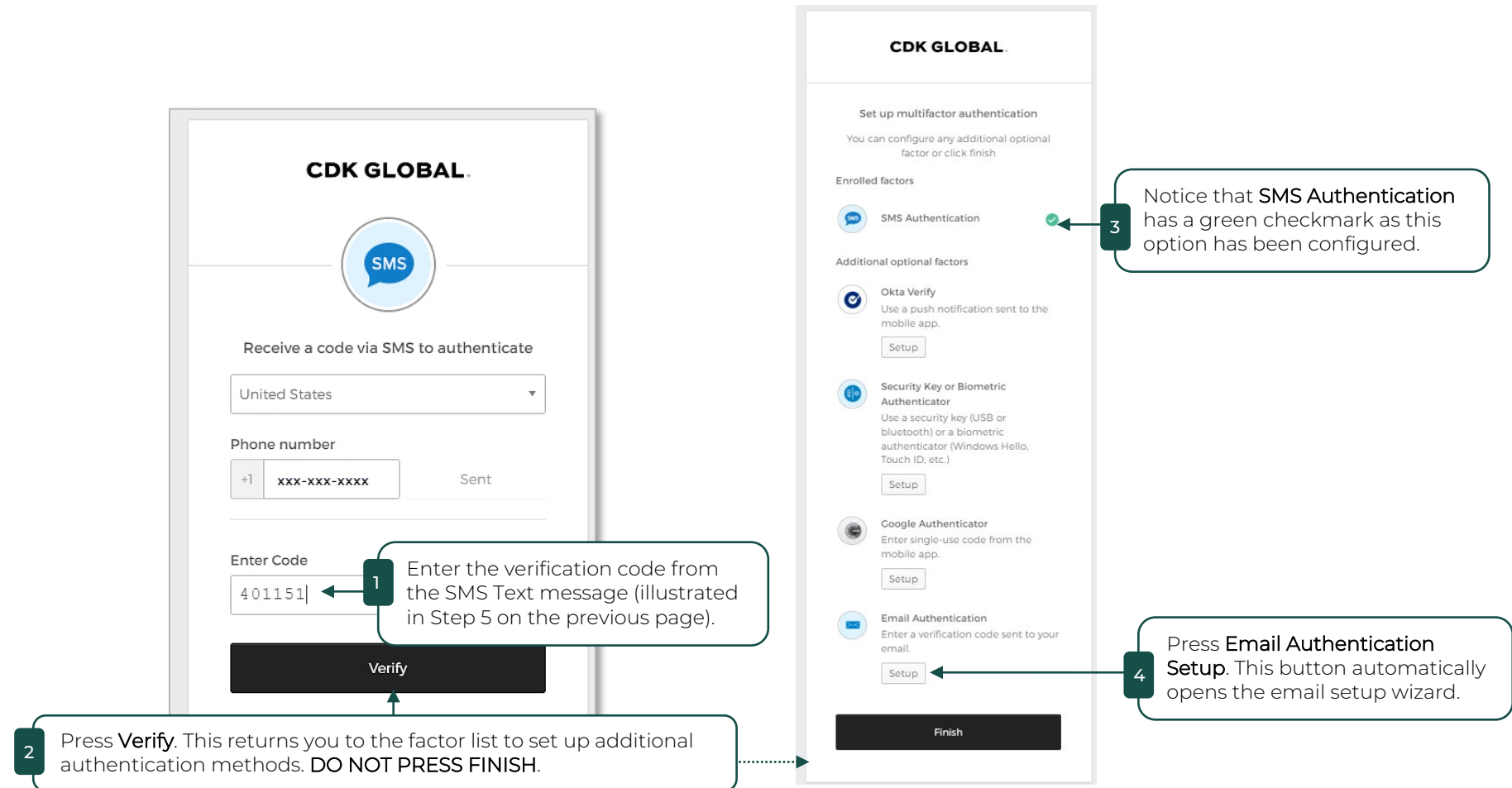


Figure 7: Complete SMS Authentication Setup and Begin Email Authentication Setup

NOTE: Multiple authentication methods, especially email, are recommended in case the phone is lost or unavailable.

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Set up multifactor authentication (MFA) cont'd

Set Up MFA Email Authentication

The MFA Email Authentication method uses the same email address registered for the SSO account.

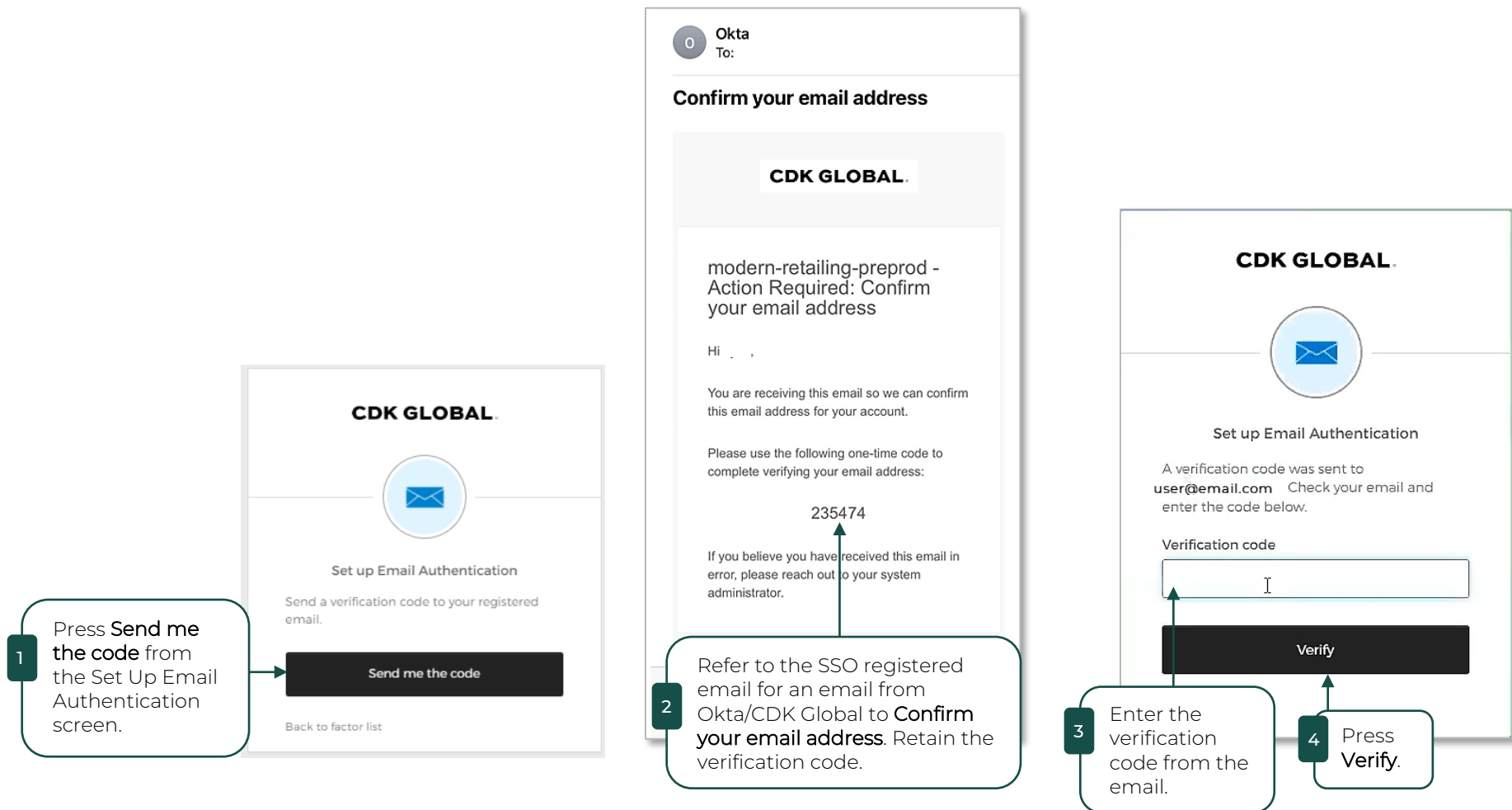


Figure 8: Email Authentication Setup

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Set up multifactor authentication (MFA) cont'd

Set Up MFA Okta Verify Authentication

Okta Verify is an app installed on your phone that allows CDK Global to push the authentication instead of transferring a code from your phone to the computer.

The figure consists of three sequential screenshots of the CDK Global user interface for setting up multifactor authentication (MFA).

Screenshot 1 (Left): The "Set up multifactor authentication" screen. It shows "Enrolled factors" with "SMS Authentication" and "Email Authentication" both marked with green checkmarks. Under "Additional optional factors", "Okta Verify" is listed with a "Setup" button. A callout labeled "1" points to the green checkmark next to "Email Authentication" with the text: "Notice that **Email Authentication** has a green checkmark as this option has been configured." A callout labeled "2" points to the "Setup" button for "Okta Verify" with the text: "Press **Okta Verify Setup**."

Screenshot 2 (Middle): The "Setup Okta Verify" screen. It prompts the user to "Select your device type" with radio buttons for "iPhone" and "Android". A callout labeled "3" points to the "iPhone" option with the text: "Select the **device type** that you use."

Screenshot 3 (Right): The "Setup Okta Verify" screen showing the next step. It says "Download **Okta Verify** from the App Store onto your mobile device." and features a "Next" button. A callout labeled "4" points to the "Download Okta Verify from the App Store" link with the text: "Press the **Okta Verify** from the App Store link to download the app." A callout labeled "5" points to the "Next" button with the text: "Press **Next**. The next screen shows a QR Code that is used later in this setup. Do not close the QR screen."

Figure 9: Okta Verify Setup

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Set up multifactor authentication (MFA) cont'd

Set Up MFA Okta Verify Authentication cont'd

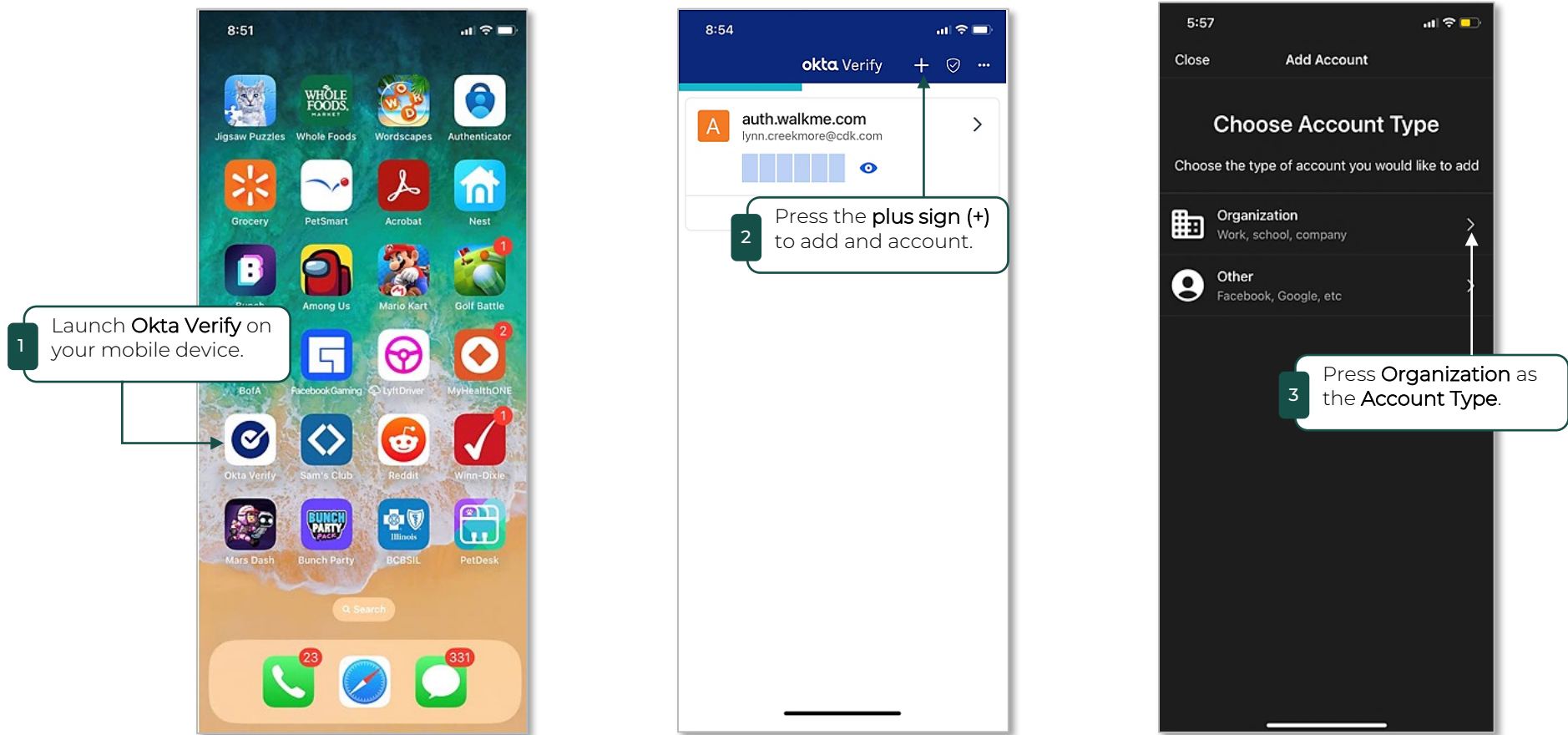


Figure 10: Create Okta Verify Account

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Set up multifactor authentication (MFA) cont'd

Set Up MFA Okta Verify Authentication cont'd

Scan the QR Code to add CDK Global to your Okta Verify accounts.

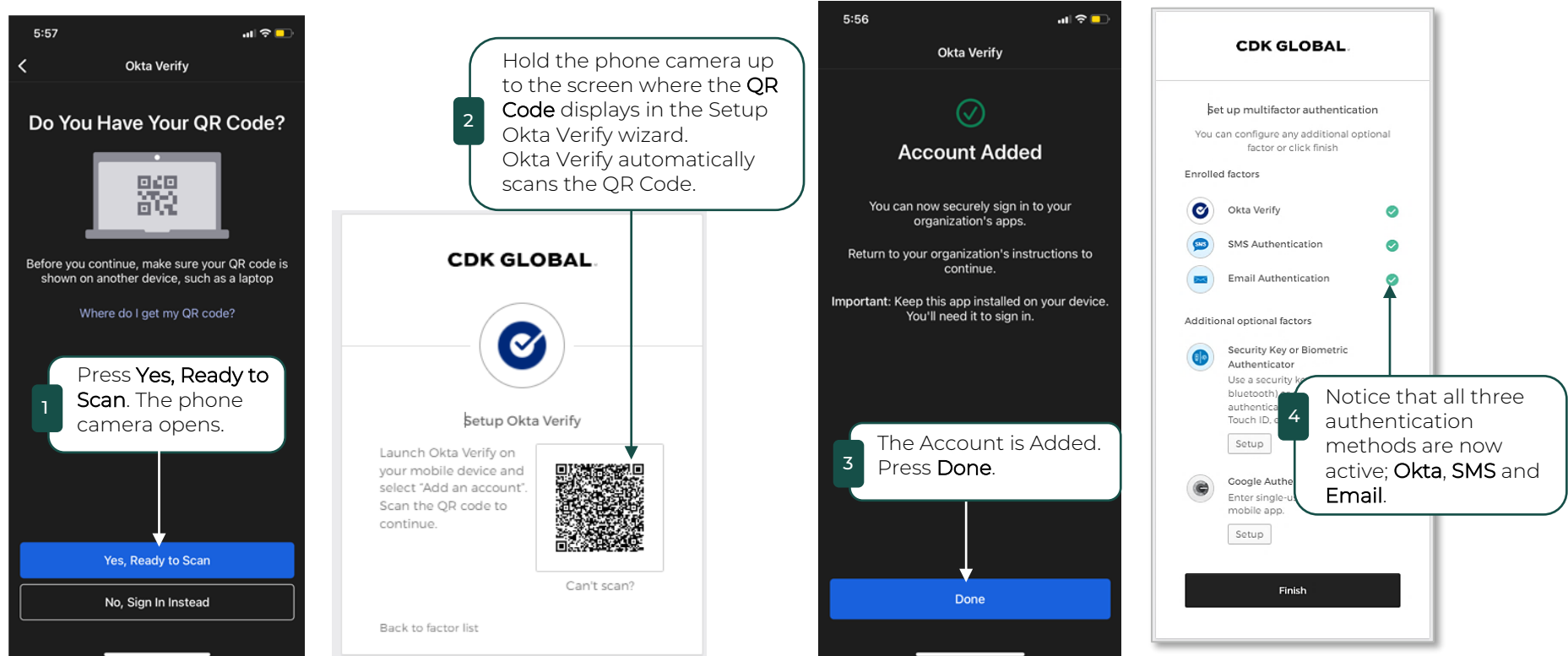


Figure 11: Add CDK Global to Okta Verify

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New Login

Use Single Sign On (SSO)

Login to the CRM using the newly created Single Sign On (SSO). A message displays if you have created the SSO and try to log in with your CRM credentials.

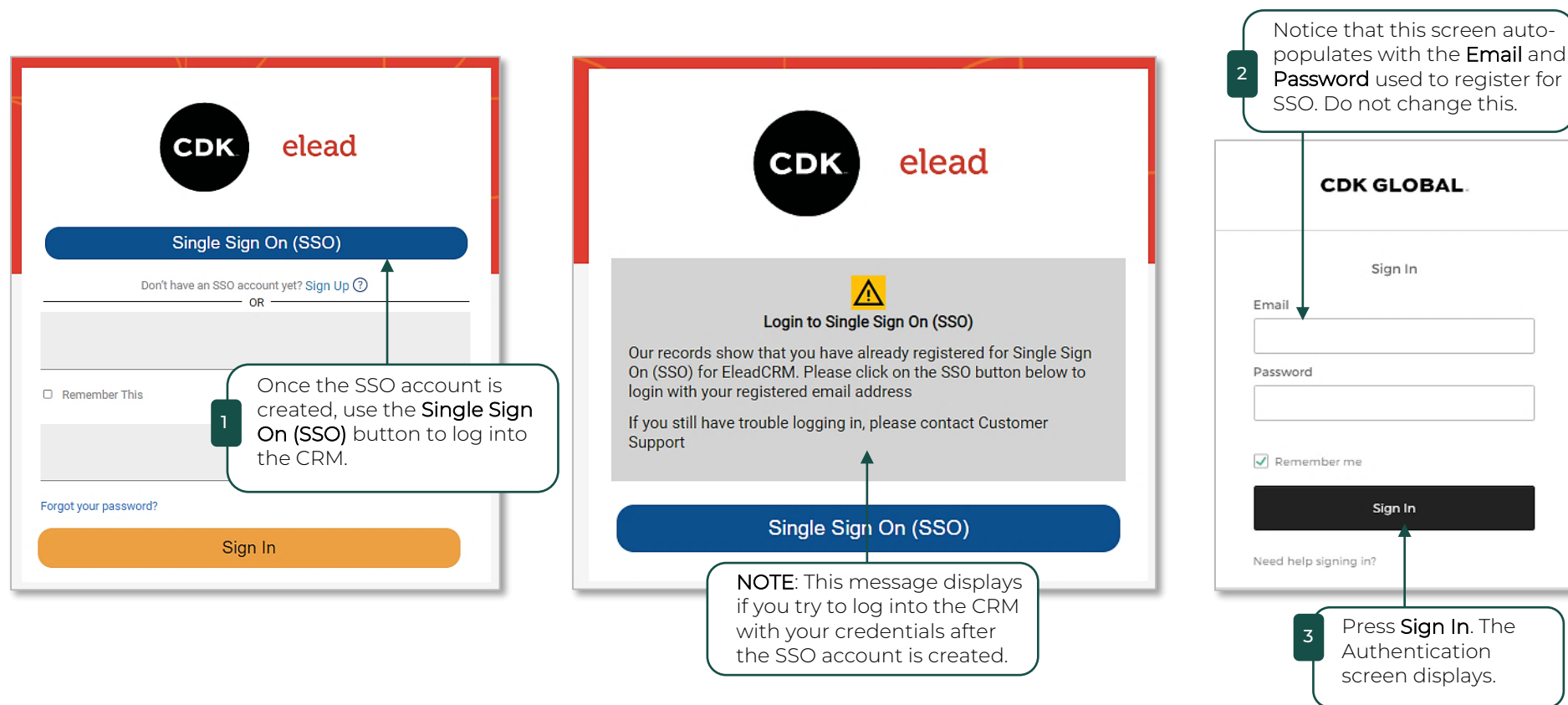


Figure 12: Login Screen for SSO

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New Login Authentication Process cont'd

Select Authentication Method

Once the MFA options are configured, select which method to use for authentication each time you log into the CRM.

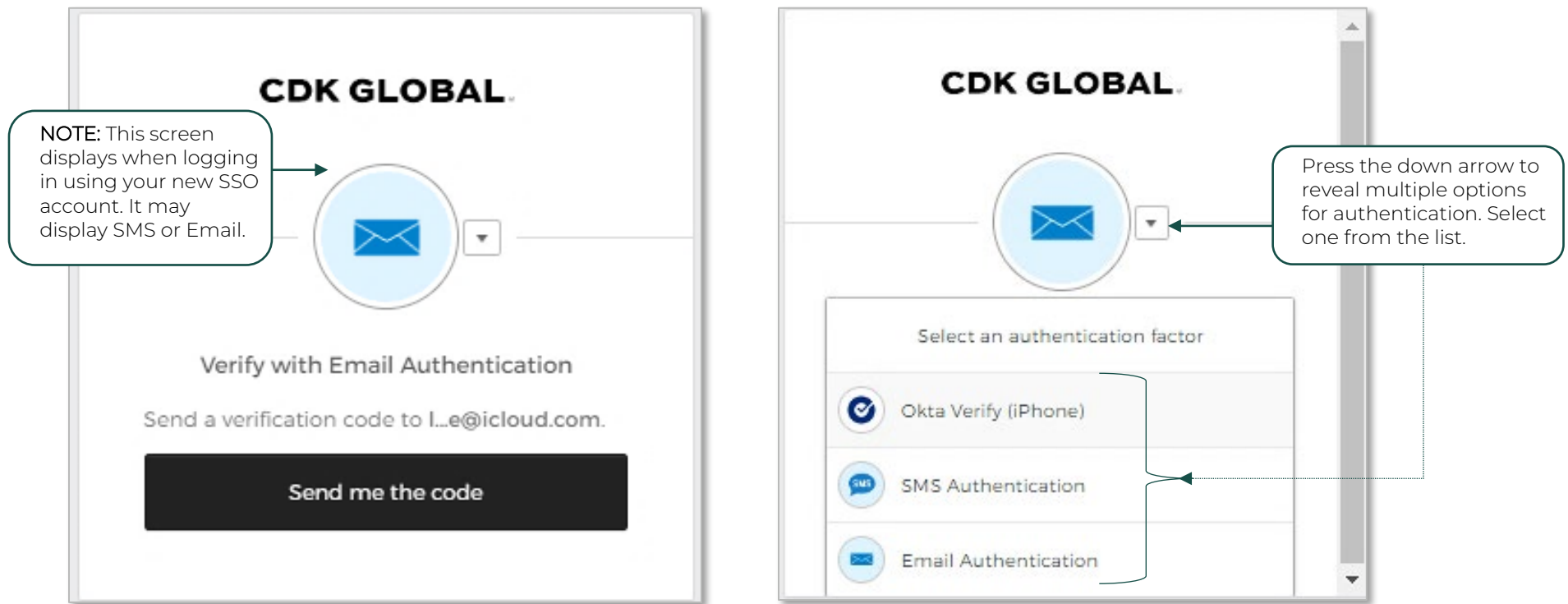


Figure 13: Multiple Authentication Methods

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New Login Authentication Process cont'd

Authenticate with SMS Text

The verification code is sent to your mobile phone in an SMS Text message. Use that code to authenticate on your workstation.

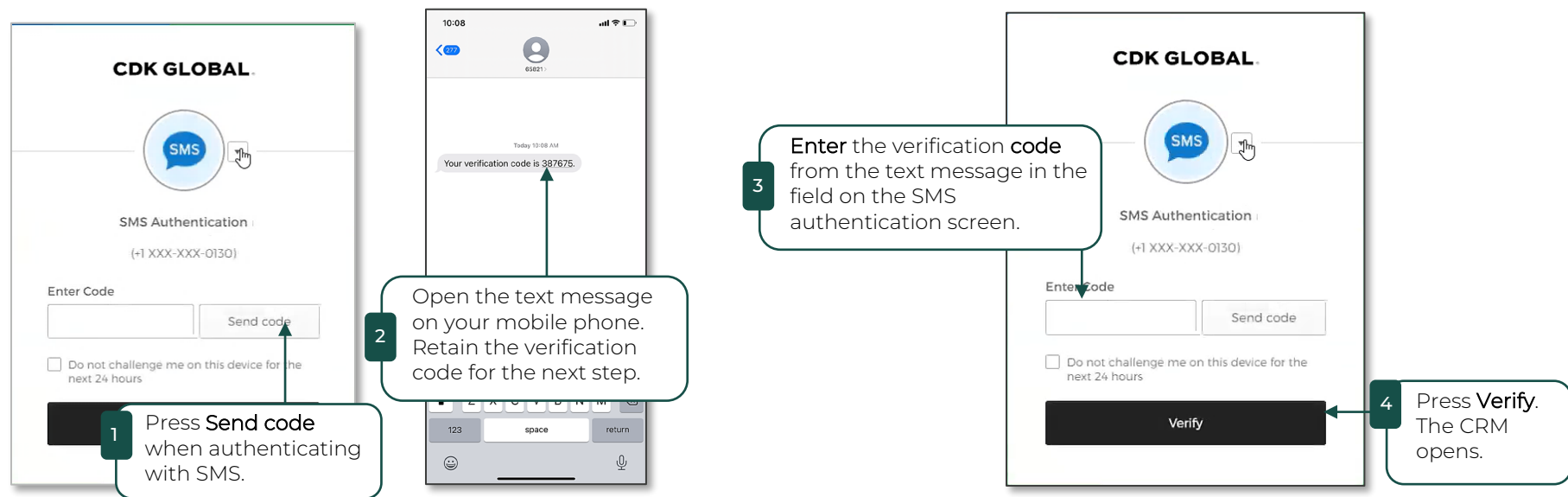


Figure 14: SMS Authentication

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New Login Authentication Process cont'd

Authenticate with Email

Use the email registered when creating the SSO account to authenticate.

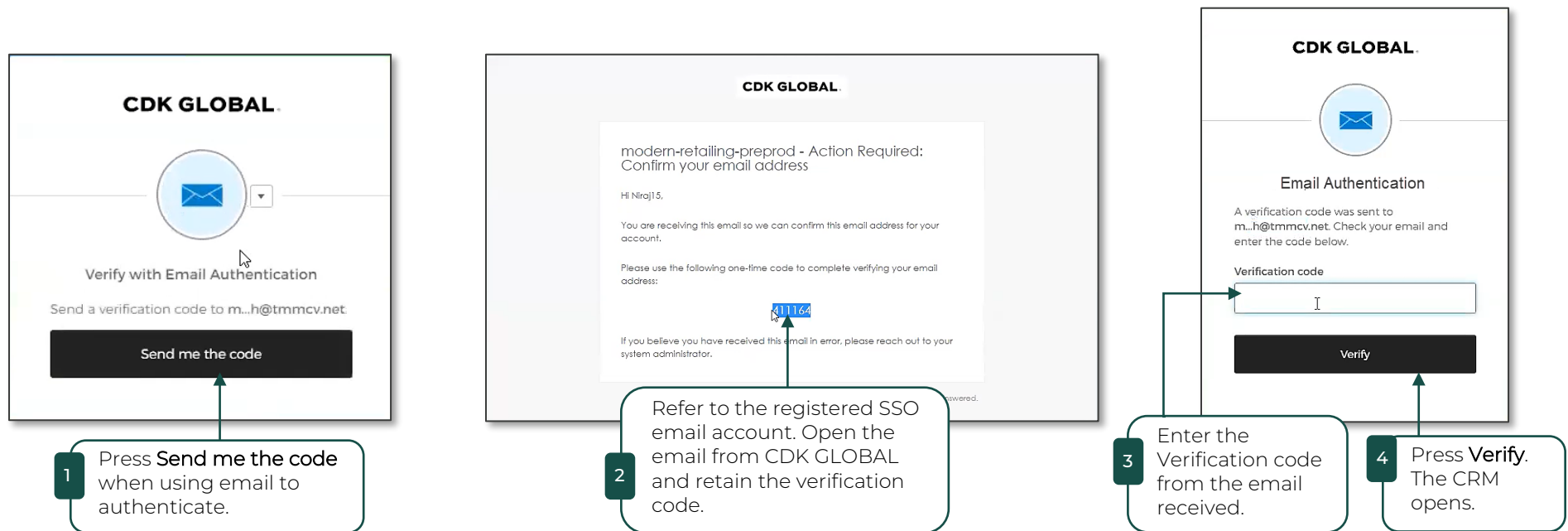


Figure 15: Email Authentication

Cont'd on next page

New Login Authentication Process cont'd

Authenticate with Okta Verify

Okta Verify is an easy method to use. It can either provide a code to enter on the screen or send a push notification which only requires a positive response to open the CRM.

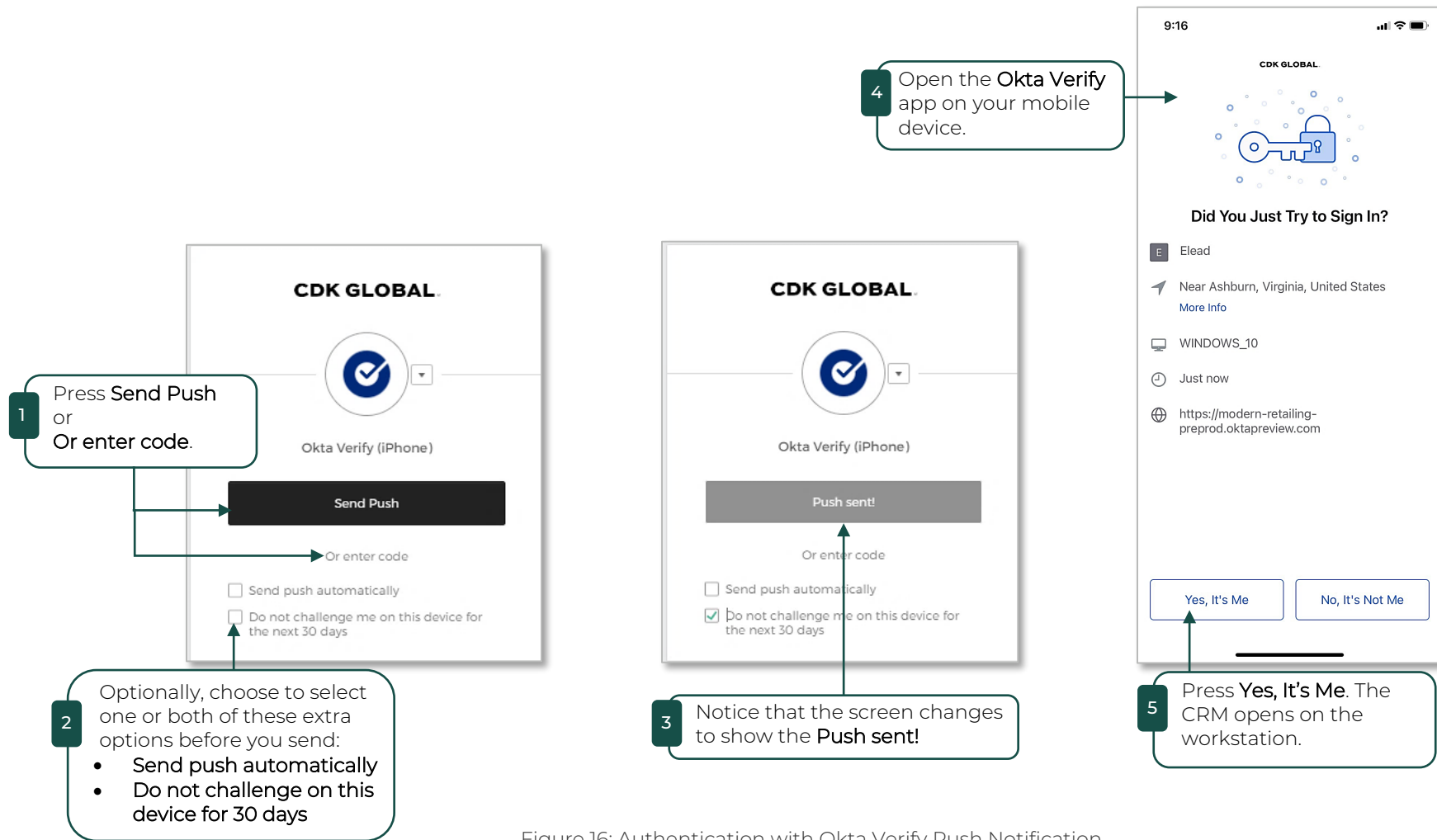


Figure 16: Authentication with Okta Verify Push Notification

CRM Mobile login with SSO

The CRM Mobile app uses the same verification email address as configured from the CRM desktop version in this [Section](#). You must complete the SSO and MFA setup on the CRM desktop version first.

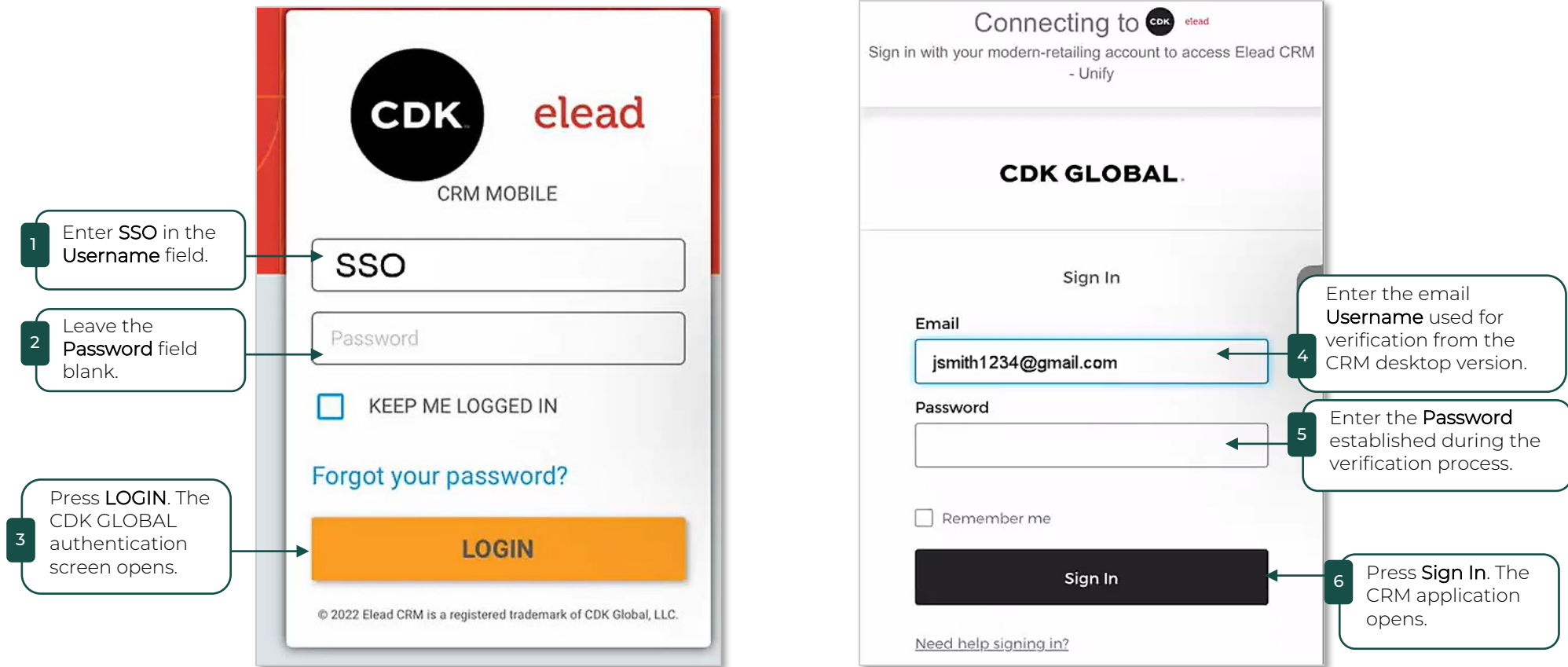


Figure 17: CRM Mobile Login

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