

Single Sign On and Multi-Factor Authentication

User Guide

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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** Press **Sign Up** to begin setting up a new SSO and MFA.

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** Enter your Elead CRM credentials.

Password

Sign In **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.

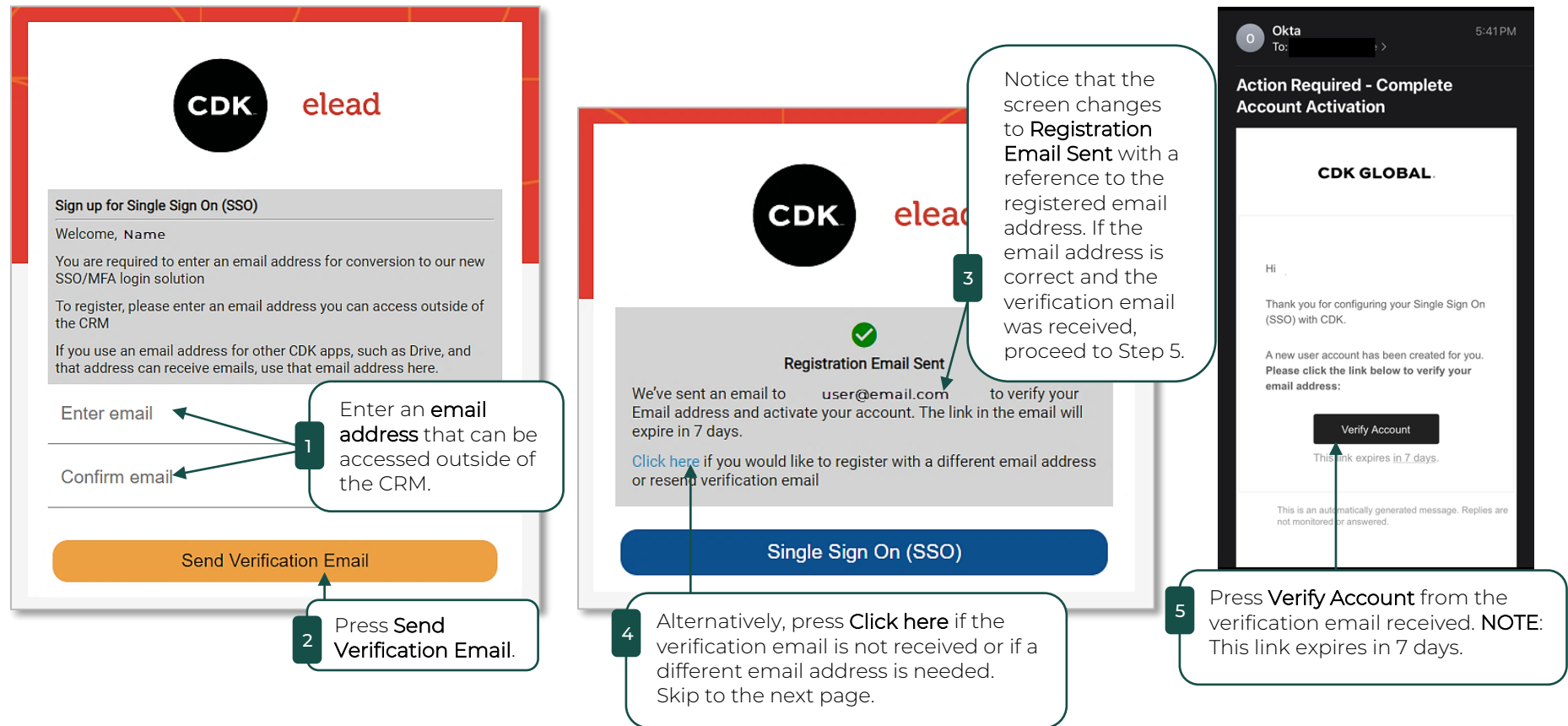


Figure 2: Sign Up with Email Account

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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.

The screenshot shows the 'Register New Email' page for CDK elead. The page has a red header bar with the CDK elead logo. Below the header, there is a grey box with the title 'Register New Email' and the text 'You are currently registered as user@email.com'. Below this, it says 'If you wish to change the email address, please enter an email address that is accessible outside of the CRM'. There are two input fields: 'Enter email' and 'Confirm email'. Below these fields is an orange button labeled 'Change Email Address'. At the bottom of the page, there is a link that says 'Didn't receive an email? Resend'. Numbered callouts provide instructions: 1. 'Enter a different email address that can be accessed outside of the CRM.' points to the 'Enter email' field. 2. 'Press Change Email Address. Repeat Steps 1, 2, 3 and 5 from previous page.' points to the 'Change Email Address' button. A third callout points to the 'Resend' link: 'Press Resend if the registered email address was correct but the verification email was not received.'

Register New Email Address

Resend Verification Email to registered email

1 Enter a different email address that can be accessed outside of the CRM.

2 Press Change Email Address. Repeat Steps 1, 2, 3 and 5 from previous page.

Enter email

Confirm email

Change Email Address

Didn't receive an email? [Resend](#)

Press Resend if the registered email address was correct but the verification email was not received.

Figure 3: Resend Verification Email or Register Different Email Account

Cont'd on next page

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 form contains the following sections:

- Enter new password:** A text input field with a password icon. A callout 1 points to this field: 'Enter a new strong password that will be used by your SSO login.'
- Password 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 text input field. A callout 2 points to this field: '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?'. A callout 3 points to this dropdown: 'Choose a forgot password question from the list so that you can reset your password if you forget it.'
- Answer:** A text input field. A callout 4 points to this field: 'Answer the question selected above.'
- Create My Account:** A button at the bottom right. A callout 5 points to this button: 'Press **Create My Account**. The SSO account is created. This automatically redirects to the Elead CRM application landing.'

Figure 4: 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

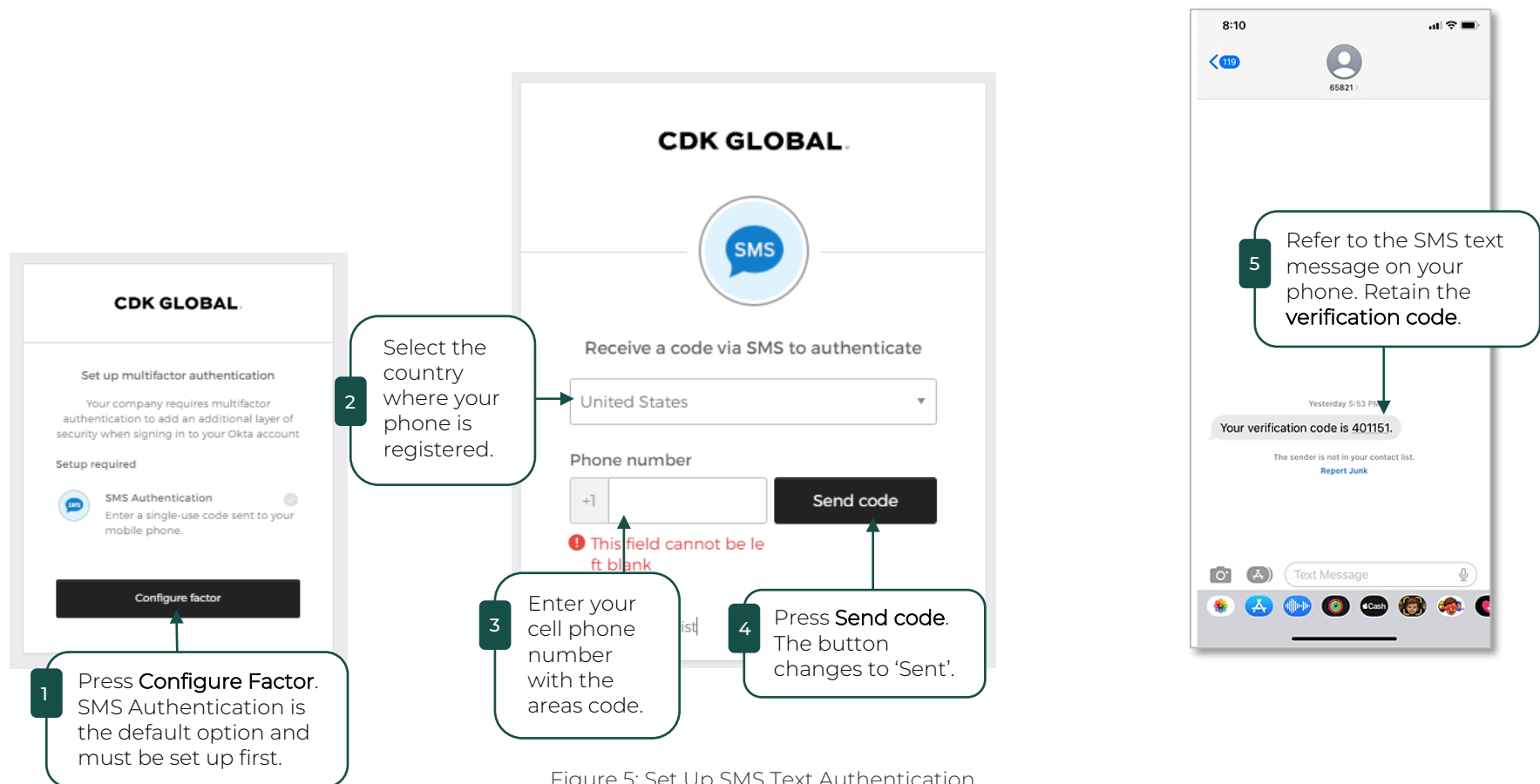


Figure 5: Set Up SMS Text Authentication

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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.

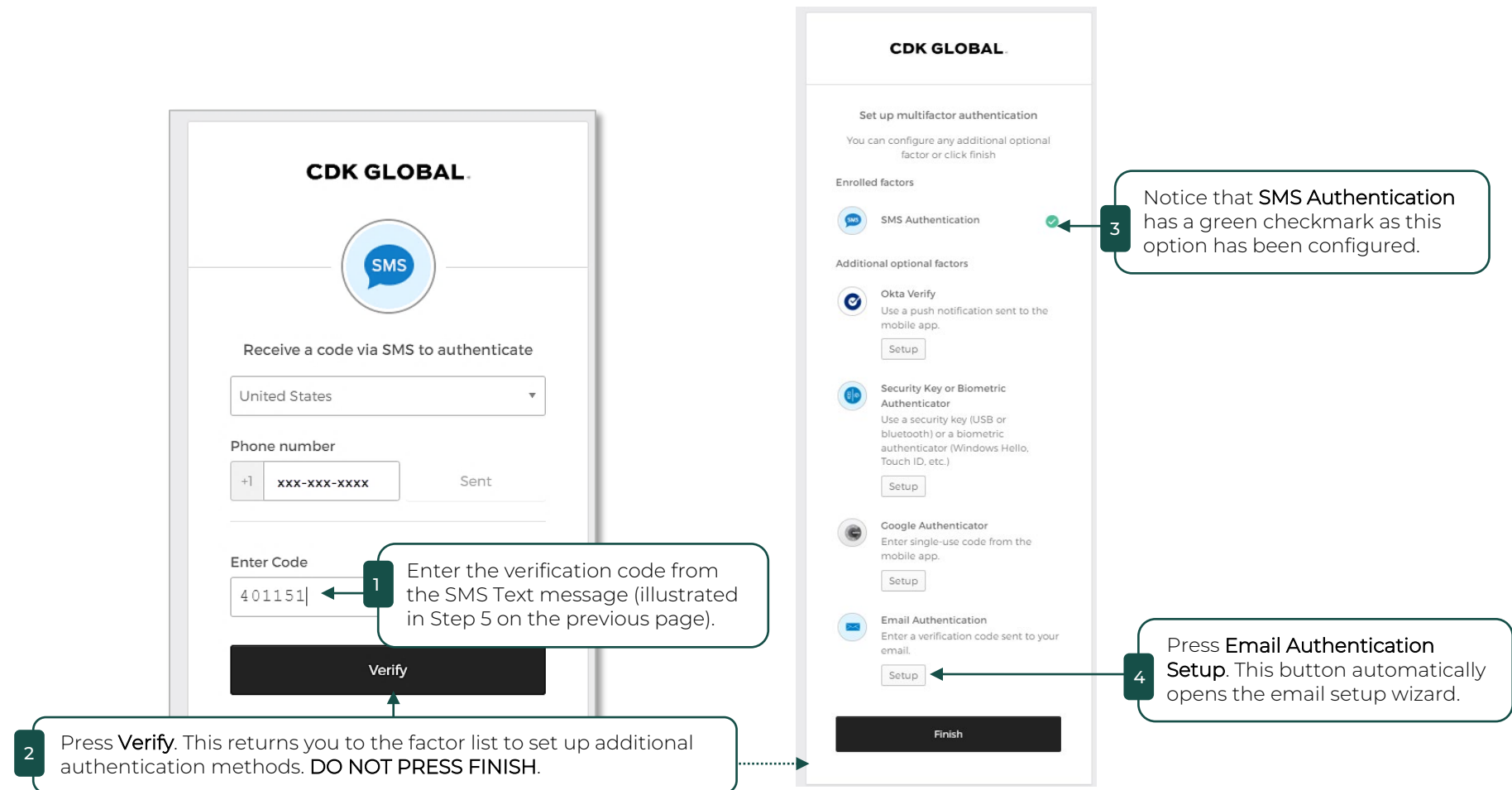


Figure 6: Complete SMS Authentication Setup and Begin Email Authentication Setup

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.

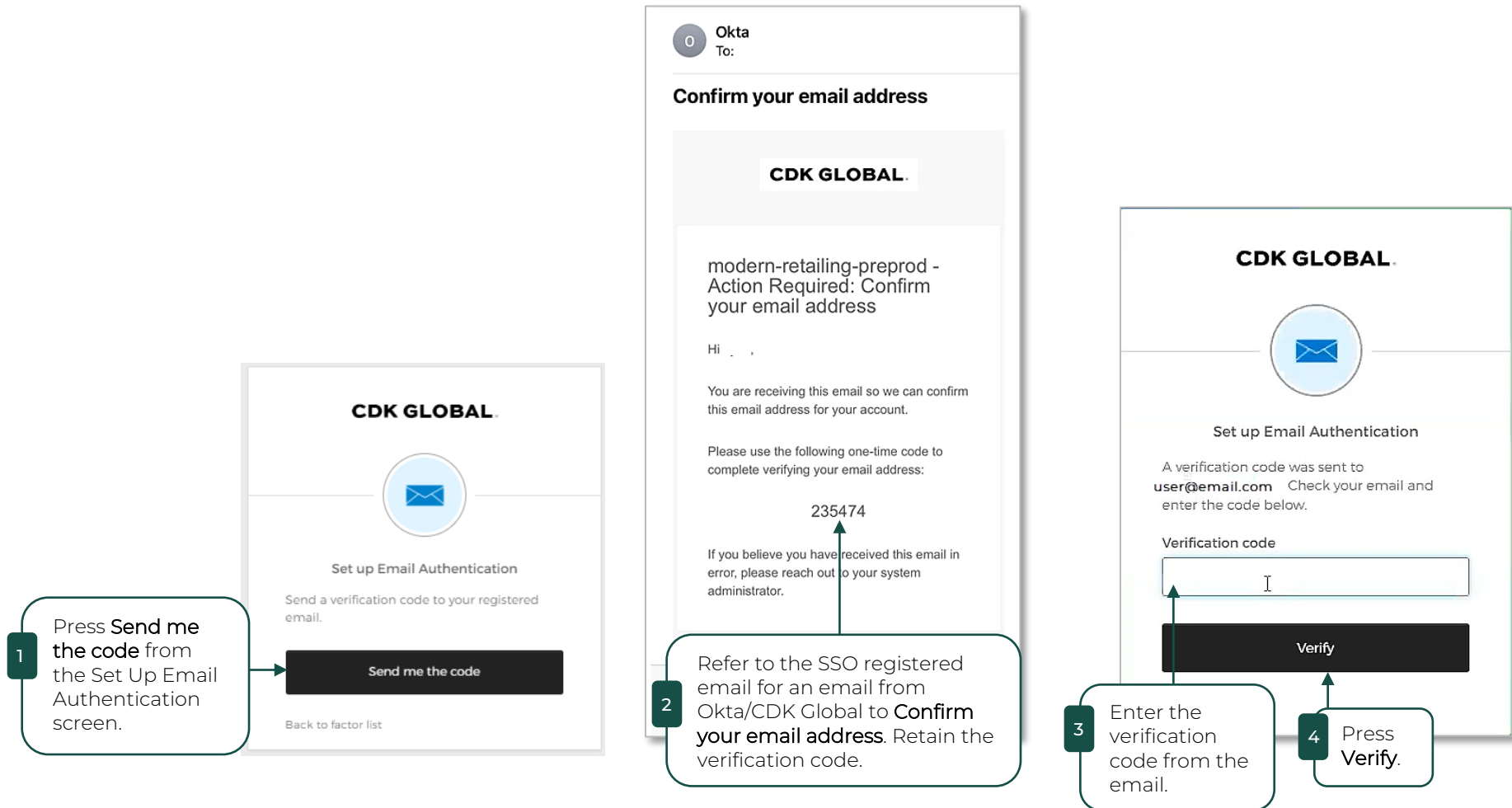


Figure 7: Email Authentication Setup

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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 screenshots of the CDK Global user interface, illustrating the steps to set up Okta Verify for multifactor authentication.

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 "Email Authentication" checkmark, stating: "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", stating: "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, stating: "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 has a "Next" button. A callout labeled "4" points to the "Download Okta Verify from the App Store" link, stating: "Press the Okta Verify from the App Store link to download the app." A callout labeled "5" points to the "Next" button, stating: "Press Next. The next screen shows a QR Code that is used later in this setup. Do not close the QR screen."

Figure 8: Okta Verify Setup

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Set up multifactor authentication (MFA) cont'd

Set Up MFA Okta Verify Authentication cont'd

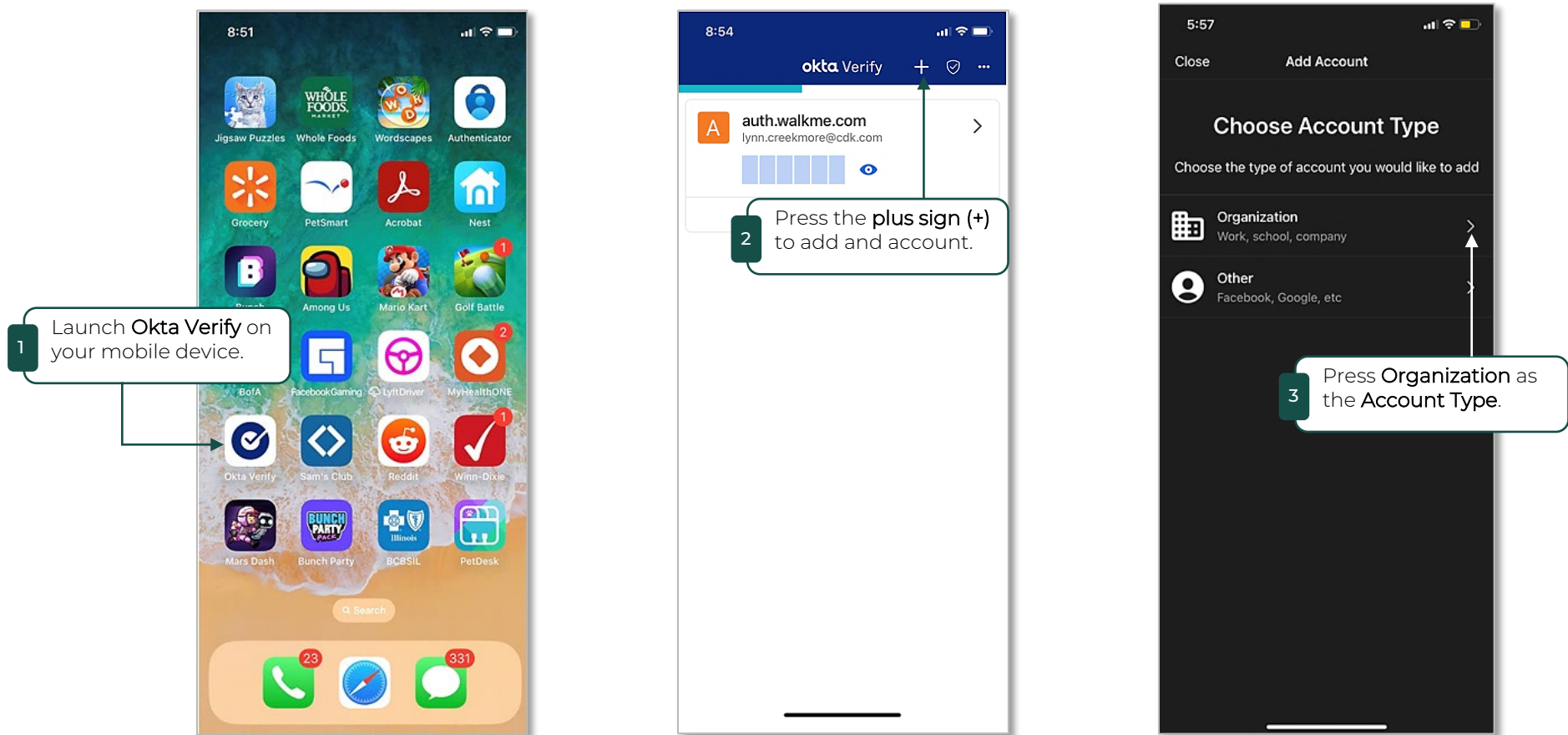


Figure 9: Create Okta Verify Account

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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.

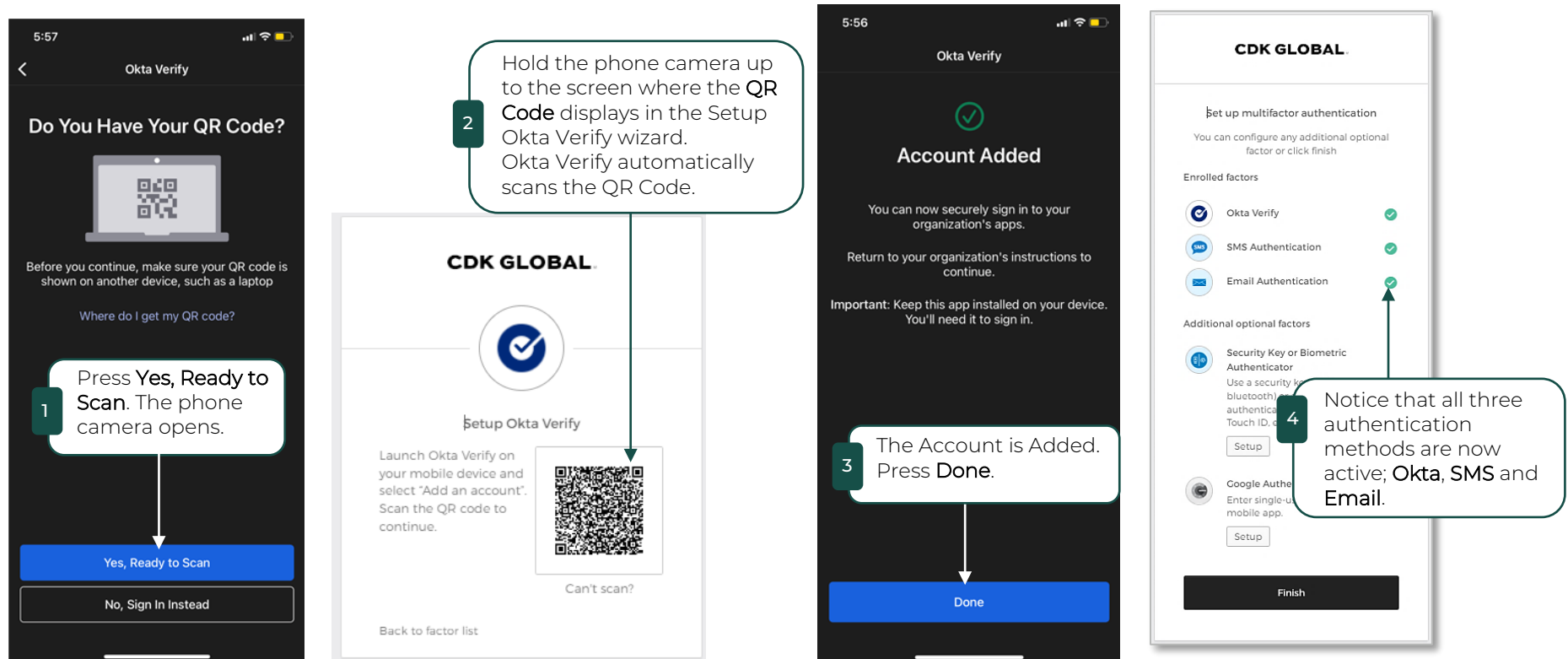


Figure 10: Add CDK Global to Okta Verify

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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.

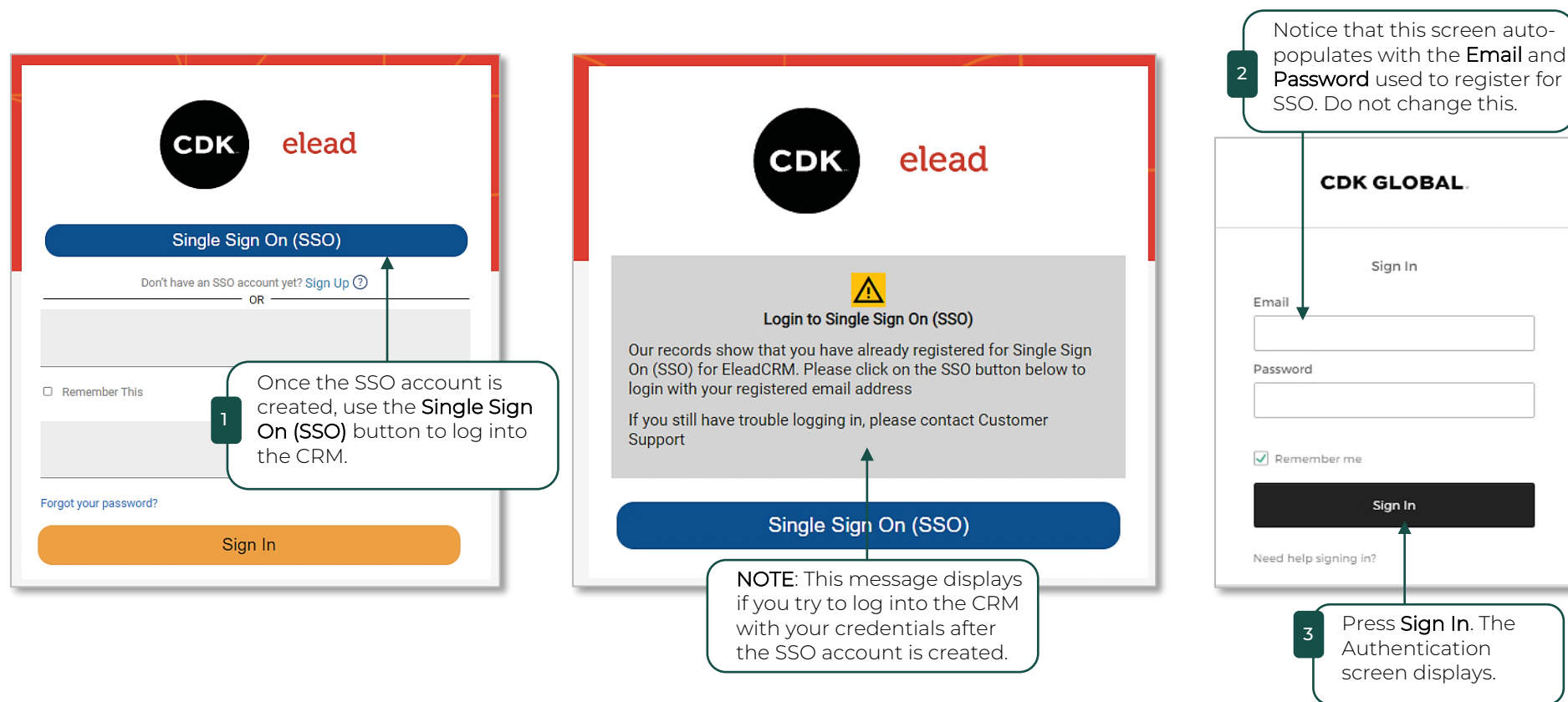


Figure 11: Login Screen for SSO

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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.

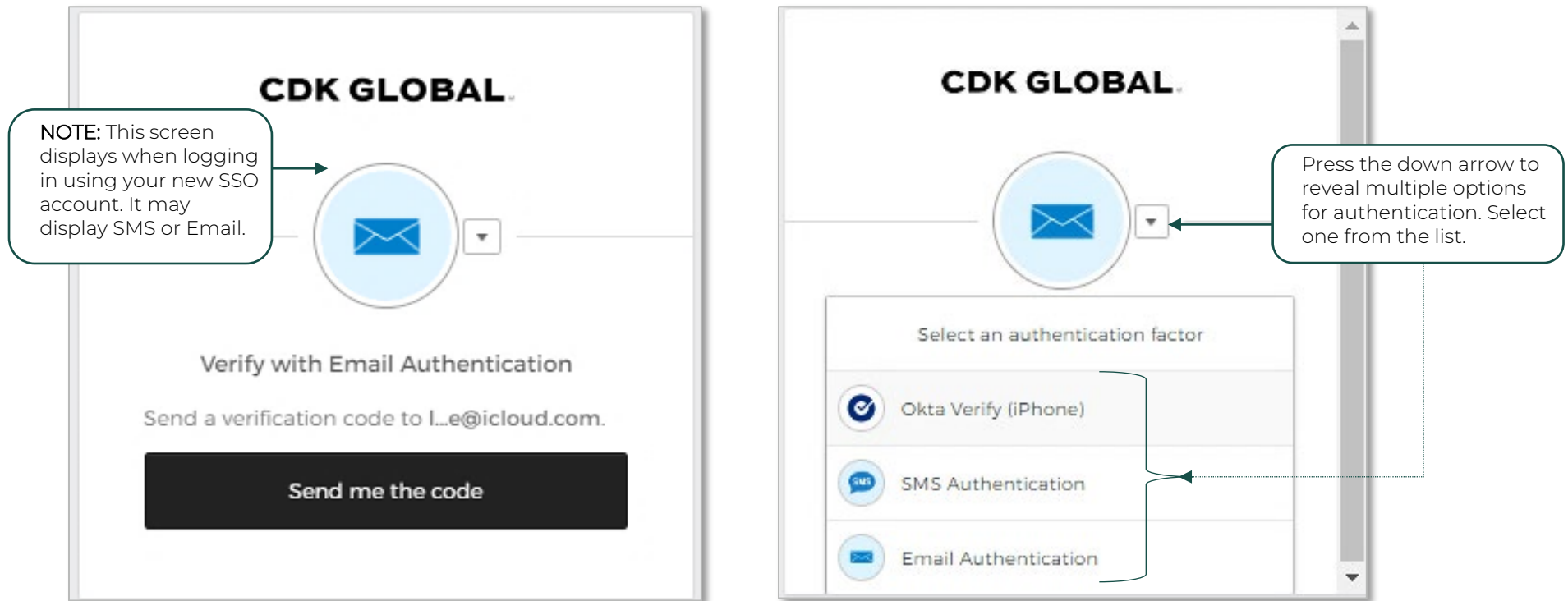


Figure 12: Multiple Authentication Methods

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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.

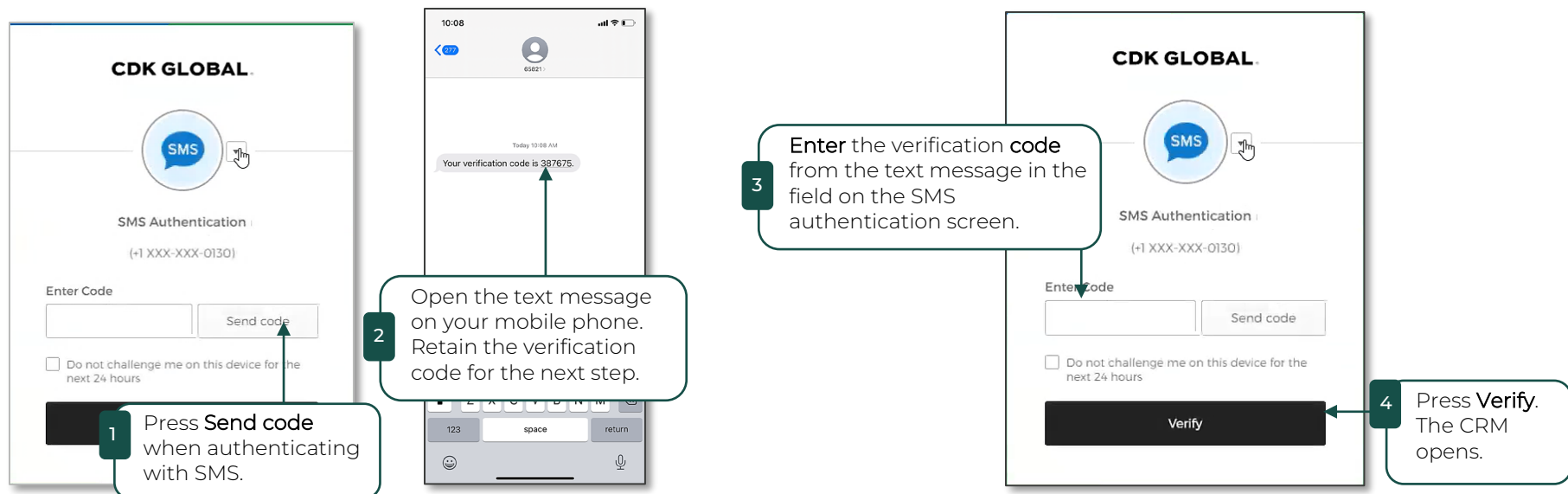


Figure 13: SMS Authentication

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New Login Authentication Process cont'd

Authenticate with Email

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

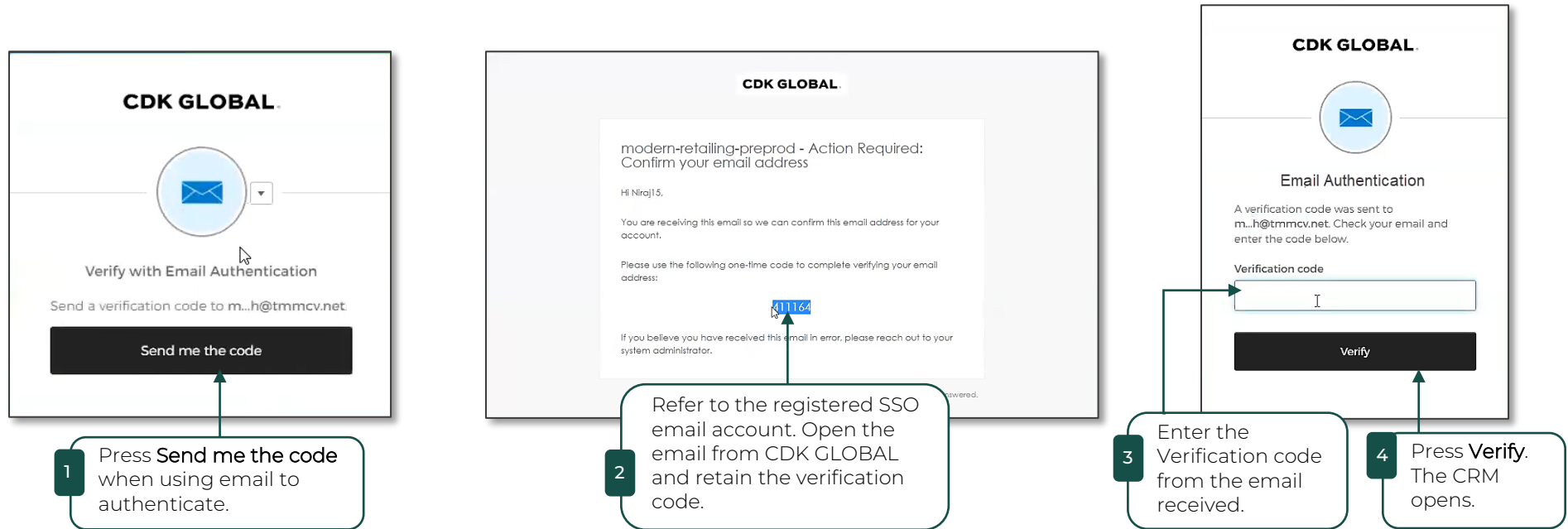


Figure 14: Email Authentication

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.

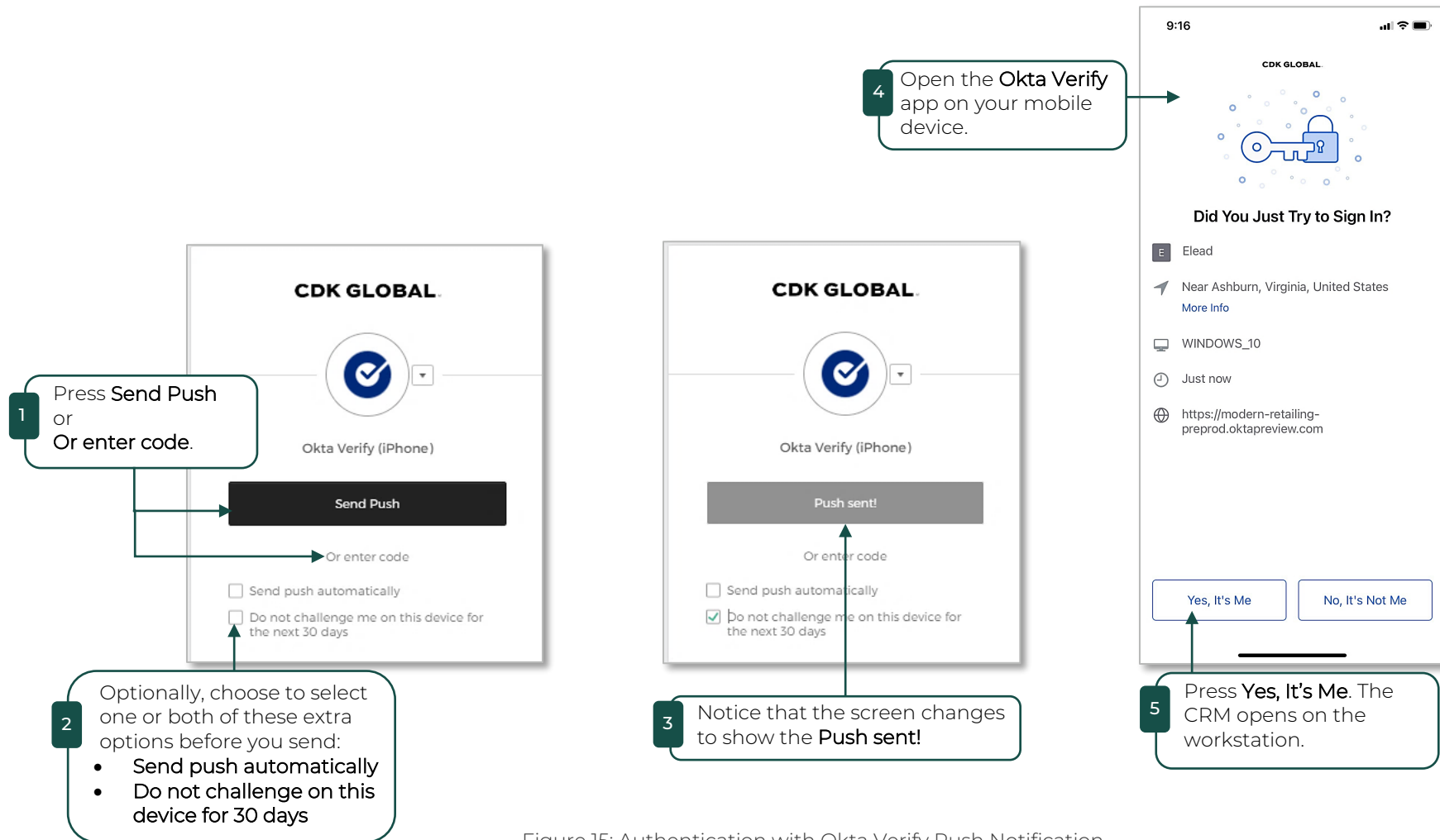


Figure 15: Authentication with Okta Verify Push Notification