

You can use Text Connect to communicate with your customers by text message through CDK CRM. When you use this feature, a Text Connect tab is added to CDK CRM, from which you can text. You can also start a text from a lead record if your customer has a valid cell phone number on record. Text messages are sent over your dealership land line (or toll-free line).

Note: This feature requires you to use Internet Explorer v. 10 or higher. It also requires you to purchase CDK Text Connect. If you do not already have Text Connect, see the [Text Connect](#) on the www.CDKglobal.com Text Connect Solutions page.

Step 1: Give Your Users Access to Text Connect

Once CDK Support notifies you that they have set up this integration for you, you'll need to give each user who will use Text Connect from CDK CRM access to the feature.

To do this, you'll need:

- The **list of employees** who will use Text Connect in CDK CRM
- The **phone number** the dealership will use for Text Connect

Once you have everything you need, go in to each employee's user record and set up the phone system user ID. Here's what to do:

1. Log in to CDK CRM and go to **CRM Menu > Setups > Users** to get to the Users tab.
2. Click the + sign next to each employee's user ID.
3. Enter the employee's phone number at the dealership in the **Text Connect** field.

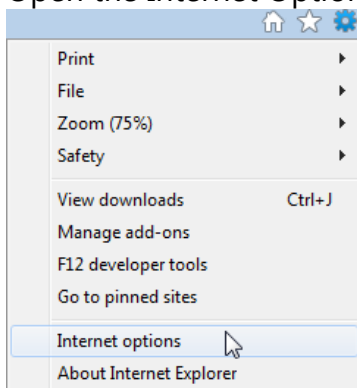
Repeat these steps for each user of the feature.

Step 2: Set Up Your Users' Workstations

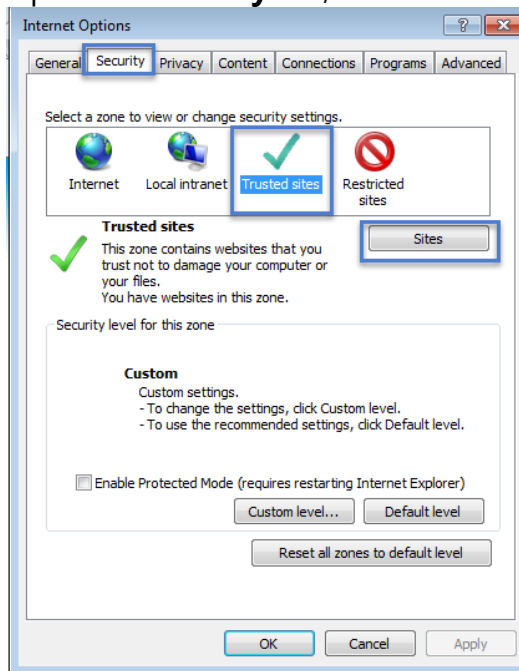
The next step is to set up your user's workstations to allow the Text Connect feature to display properly.

1. Log in to the workstation.
2. Open Internet Explorer.

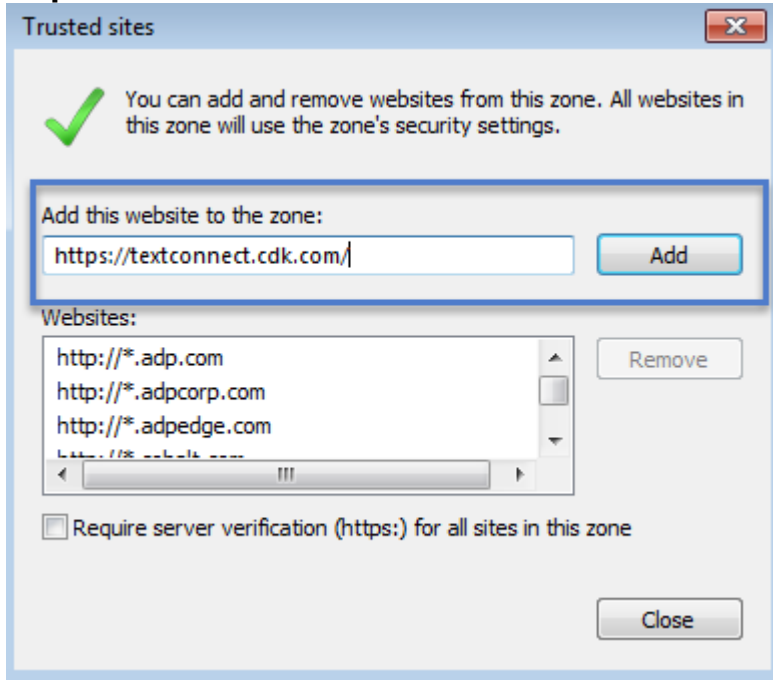
3. Open the Internet Options.



4. Open the **Security** tab, click **Trusted Sites**, and then click **Sites**.



5. Copy the following URL into the **Add website into this zone** field and then click **Add**:
https://textconnect.cdk.com/

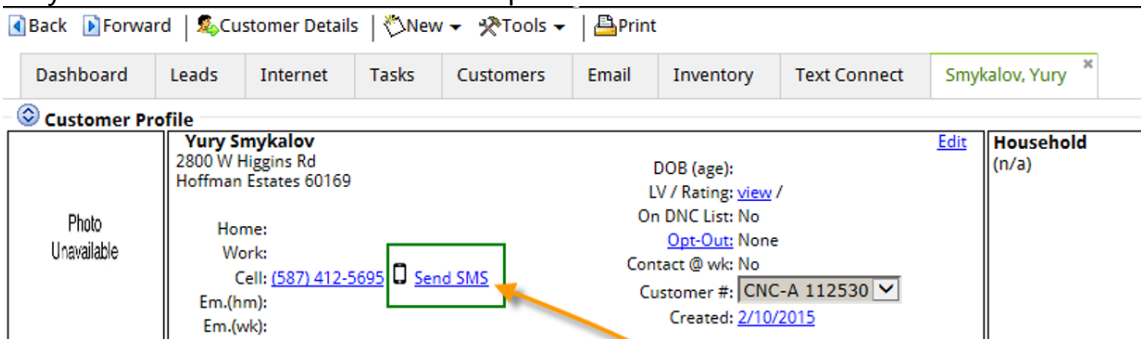


6. **Close** the window, then click **OK** on the Internet Options window. The setup for this workstation is now complete.

Step 3: Start working with Text Connect

Once you've set up your users, they are ready to start working with Text Connect. Here's how.

1. Users can text a customer directly from a lead by clicking the **Send SMS** link. This link will appear only for customers with a valid **Cell** phone number on record.



Customer Profile

Yury Smykalov
2800 W Higgins Rd
Hoffman Estates 60169

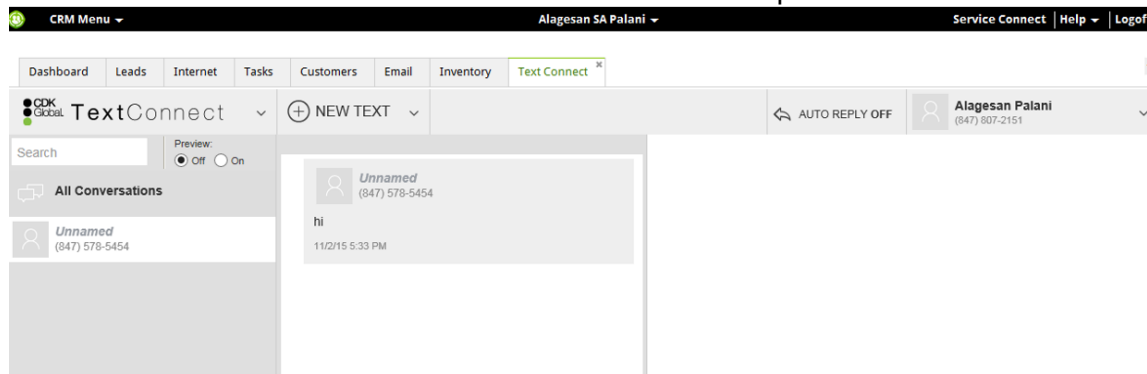
DOB (age):
LV / Rating: [view](#) /
On DNC List: No
[Opt-Out](#): None
Contact @ wk: No
Customer #: [CNC-A 112530](#)
Created: [2/10/2015](#)

Household (n/a)

Photo Unavailable

Home:
Work:
Cell: [\(587\) 412-5695](#) [Send SMS](#)
Em.(hm):
Em.(wk):

2. Alternately, Users can open Text Connect as its own tab within CRM, and send and receive texts from that tab. Select **CRM Menu > Text Connect** to open it.



3. Use Text Connect’s mobile application. There are app versions available for both the iPhone and Android platforms.

For additional information on downloading the mobile applications and using Text Connect, see the [Text Connect Quick Reference Guide](#).

What to do if there are problems

Sometimes weird stuff happens. If it happens when you’re working with Text Connect, check here before calling support.

If this is happening	Try this
The Text Connect chat window won't open properly.	Most likely, you haven't set up Text Connect as a trusted site in Internet Explorer. Follow the instructions in Step 2 of this document.
I don't see the Send SMS button for my customer.	Is there a phone number listed in the Cell field for the customer? If not, the link will not appear.
I don't see the Text Connect option on my CRM Menu .	Most likely, you have not been set up as an authorized user. <ol style="list-style-type: none"> 1. Open Customize My CRM. 2. Open the User Account Settings tab. 3. Verify that a valid number appears in the Text Connect Number field in the Integration Settings section.
I do not see the Text Connect Number field.	The integration has not been set up on the CDK side. If you have contracted for the integration, contact CDK Support for assistance.