

CDK GLOBAL[®]

CDK Modern API Migration Guide

Migrating to Modern APIs and Marketplace on Fortellis

Table of Contents

<i>Fortellis Migration Overview</i>	3
Partner Program Sunset	3
Sunset Notification – The Start of the Migration	3
Timeline for Migrating to Fortellis	3
Start Your Migration Early	4
CDK’s New Modern APIs	4
New Pricing for CDK APIs	4
Dealer Consent – Migrating App Subscriptions	5
<i>Fortellis Onboarding</i>	5
Step 1: Create an Account and Connect with your Organization.	5
Step 2: Registering Your App	5
Step 3: Selecting APIs for Your App	5
Step 4: Select Pricing Options and Agree to Terms	8
Step 5: Develop and Test Your App	8
Step 6: Certify your App	9
Step 7: Publish an App Listing in Marketplace	10
Step 8: Migrating Partner Program Subscriptions to Fortellis	10
Step 9: Pilot Test Your App with Dealers	10
Step 10: Confirm Readiness to Cutover to Fortellis in Writing	11
<i>Monthly Billing Transition</i>	11

Fortellis Migration Overview

Partner Program Sunset

In September 2022, CDK announced that it is sunsetting the Partner Program and replacing the Predefined Integration Points (PIPs) with modern APIs on the Fortellis Automotive Commerce Exchange. The migration of Independent Software Vendors (ISVs) from the Partner Program to Fortellis will be completed in phases as the new CDK APIs are made available on Fortellis with no disruption to dealers consuming ISV apps.

Sunset Notification – The Start of the Migration

ISVs will receive a sunset notification from CDK when all the integration they currently use via the PIPs is available on Fortellis. This sunset notification will mark the start of the ISV's migration period.

Timeline for Migrating to Fortellis

In the sunset notification, ISVs will be notified of the deadline to complete the migration of their app(s) to Fortellis. The migration is recognized as complete when the ISV provides written confirmation that they are ready for the cutover to Fortellis and the termination of their Partner Program integration.

The official cutover will include a transition of billing from Partner Program to Fortellis, which will take place on the first day of the month after the ISV has provided written confirmation that they are ready for the cutover. The billing transition is explained in more detail later in this guide.

Incentive to Migrate Faster

As an added incentive to complete the migration faster, CDK is offering to waive the Fortellis App Certification fee, a \$2500 value, if you complete the process earlier. You will be notified of your early migration date for your App in the sunset notification.

Adding New Integration during the Migration

If an ISV chooses to add integration to their app as they migrate, then upon request, CDK will factor the added integration into the determination of a time extension, allowing the ISV additional time to complete their migration as necessary. New integration is defined as

integration above and beyond that which is required to fulfill an ISV's existing app integration requirements as implemented in the Partner Program.

Start Your Migration Early

There is no need to wait for a sunset notification, many core APIs that drive your solution, such as extract APIs, may already be available. Your team can follow the steps within this guide, allowing them to test foundational APIs today, while waiting for the release of other APIs as outlined in the API Roadmap found on the [Partner Program Migration](#) page for developers.

CDK's New Modern APIs

The new APIs offer many benefits for today's developers with advanced tools, simplified pricing, and straight forward data agreements designed to allow developers to integrate their apps faster. With these modern APIs, CDK is pivoting from using SOAP / XML to REST / JSON. Both GET and POST functions are supported depending on the API being used, providing equal or better functionality compared to legacy PIPs. The GET functions also introduce a new feature for long-running operations where endpoints that process large data sets provide an immediate acknowledgement and a URL to retrieve the response a short time later.

Additionally, CDK is releasing a variety of Async APIs, which are designed to publish changes from CDK apps through a webhook to meet the needs for near real-time updates, record synchronization, and event-triggered workflows. The first Async APIs are expected to be available in the Phase 2 release of APIs at the end of June 2023.

New Pricing for CDK APIs

The pricing for CDK's new APIs includes three pricing plans: Essentials, Plus, and Pro, which have a monthly subscription fee for each API plus an overage fee for designated endpoints within the API that is charged per transaction over a specified threshold. Pricing is no longer determined by the number of dealers subscribed to the ISV's app. Instead, it is based on the number of transactions generated by the ISVs app on the exchange over the course of a calendar month.

Please visit the [Fortellis API Directory](#) to see more information on the modern APIs, including the specifications, pricing, and available documentation.

Dealer Consent – Migrating App Subscriptions

One of the key tenets of CDK's Partner Program is ensuring that a dealer consents to access to data on their CDK systems in eStore before connectivity to the PIPs is provisioned. With the migration to Fortellis, CDK will migrate all an ISV's existing dealer subscriptions with prior dealer consent to their app on Fortellis as part of the migration process. In addition, the process for obtaining dealer consent will transition from eStore to Fortellis Marketplace, where an ISV will create an App Listing to market their product offering to prospective buyers.

Fortellis Onboarding

The following steps will need to be accomplished for your migration to be complete.

Step 1: Create an Account and Connect with your Organization

To get access to Fortellis, you will need to create an account. Visit the [Getting Started article](#) within [Fortellis Resources](#), to learn more about the steps to create an account and connect with your organization. If you receive a message that your organization already exists, please email the [Fortellis Engagement](#) team, and they will assist you.

Step 2: Registering Your App

After you have created your account and connected your account to your organization, you are ready to register your app and select the APIs that you will use within your app workflows. See the article on [Registering Apps](#) within [Fortellis Resources](#) to learn more.

Step 3: Selecting APIs for Your App

The following information is provided to help you determine which modern APIs to use in place of the PIPs you've been using in the Partner Program.

Modern Extract APIs

CDK's modern extract APIs access a central database that is refreshed from the DMS servers on an hourly or daily basis depending on the datatype. The table below specifies the refresh rate for each datatype.

Get API / Datatype	Refresh Rate
CDK Drive Get Customer	Hourly
CDK Drive Get Employee	Daily
CDK Drive Get FI Sales	Hourly
CDK Drive Get Make Model Lite	Daily
CDK Drive Get Op Code Lite	Daily
CDK Drive Get Parts Sales	Hourly
CDK Drive Get Repair Order	Hourly
CDK Drive Get Service Appointment	Hourly

Get Bulk

For datatypes that are transactional in nature (Repair Orders, F&I Sales, and Parts Sales), the Get Bulk endpoint returns all records within the scope of the endpoint for the last 31 days. For non-transactional datatypes like Customer, the Get Bulk endpoint returns all the records for that datatype.

Get Delta

The Get Delta endpoint gets all changed records between the specified start date-time and end date-time parameters and has a range limit of the last 5 days of changes. The start date-time parameter is required. The end date-time parameter is optional.

Get History

The Get History endpoint gets transactional history between specified start date and end date parameters with range limitations. The database will have up to 5 years of historical data available for transactional datatypes.

Async APIs

Async APIs publish changes from CDK apps through a webhook to meet the needs for near real-time updates, record synchronization, and event-triggered workflows. If an ISV used an extract PIP to obtain data more frequently than every hour, then they will want to use Async API for the given datatype to receive near real-time updates on Fortellis.

Post APIs

Post APIs will replace the PIPs that provided inserts, updates, deletes, and other functional operations. The Post APIs will also provide for reading a specific record by a key identifier prior to performing an operation on that record.

CDK API Roadmap

For more information on the release schedule for CDK's modern APIs, see the CDK API Roadmap on the [Partner Program Migration](#) reference page.

Mapping PIPs to Modern APIs

The chart below provides guidance for selecting modern APIs that replace the PIPs from the Partner Program. The chart only shows the API mappings available in the Phase 1 release. Corresponding History and Async APIs will be released in Phases 2 and 3.

If you used this PIP...	then you want to select this Modern API
Customer Extract Help Customer Extract Help Customer Privacy Extract	CDK Drive Get Customer
Employee Extract Help Employee Extract	CDK Drive Get Employee

If you used this PIP...	then you want to select this Modern API
F&I Sales Extract F&I Sales Open Extract F&I Sales Closed Extract	CDK Drive Get FI Sales
Help Make Extract Help Model Extract	CDK Drive Get Make Model Lite
Op Code Extract Help Op Code Extract	CDK Drive Get Op Code Lite
Parts Sales Extract Parts Sales Open Extract Parts Sales Closed Extract	CDK Drive Get Parts Sales
Service Appointment Extract	CDK Drive Get Service Appointment
Service Sales Extract Service Sales Open Extract Service Sales Closed Extract Service Repair Order Detail Open Extract Service Repair Order Detail Closed Extract	CDK Drive Get Repair Order

Step 4: Select Pricing Options and Agree to Terms

Once you have selected the APIs for your app, you will need to review and select the API pricing options and agree to terms to complete the registration of your app.

Step 5: Develop and Test Your App

After you have completed the app registration process, the Fortellis Engagement Team will provision access to a test system, which will serve as your sandbox for development and testing. You will receive an email outlining key details and instructions for accessing a test system. The

email will also provide an app workflow template document with common uses cases, which you will need to update and return to the [Fortellis Engagement Team](#) prior to beginning your app certification (see step 6 below).

Here are some helpful articles within [Fortellis Resources](#) will help you prepare for this email:

- [Getting your App Credentials](#)
- [Fortellis Authorization Methods](#)

For more information on App Development, we recommend you review the following resources:

- API specs and documentation in the [Fortellis API Directory](#)
- [Fortellis App Development Lifecycle](#)
- [Fortellis Developer Tutorials Introduction](#)
- [CDK App Certification Process](#)

If you have questions during development about the APIs or the data being returned, you can search for an answer to your question in Fortellis Community, or you can contact the [Fortellis Engagement Team](#).

Step 6: Certify your App

CDK will certify ISV apps to ensure a successful integration experience on Fortellis. Certification testing will examine the way the CDK APIs are utilized in the application workflows and how the app will be listed on Marketplace, taking the following criteria into consideration:

- Review of ISV app workflow ensuring alignment of expectations with API functionality
- Validate that the ISV is logging their request and response activity to support troubleshooting and resolution of integration issues
- Ensure proper utilization of the long-running operations
- Ensure proper utilization of get operations
- Ensure proper utilization of post operations
- Ensure proper utilization of async operations
- Ensure proper configuration of scheduled API requests
- Ensure proper utilization of consumer privacy flags, if applicable
- Ensure proper configuration of the App Listing in Marketplace to optimize the dealer consent process

The *Fortellis Development Kickoff* email will contain an app workflow template document, which you must complete and return to the [Fortellis Engagement Team](#) prior to certifying your app.

You will receive a Certification Test report upon completion of the testing. You must sign this report and return it for the certification step to be completed.

CDK will charge a certification fee of \$2500 for each ISV app using CDK APIs on Fortellis. For a complete overview of the certification process, please review the [CDK Fortellis Certification Guide](#).

Step 7: Publish an App Listing in Marketplace

As you consider how to list your app(s) in Marketplace, you have the following options available:

- If an app offering can be sold as stand-alone product, then that app needs to have a separate and dedicated app listing in Marketplace.
- If you have a core app offering that has one or more add-on features that each require one or more additional APIs and additional dealer consent, you can package the superset of the core app plus the add-on features as a single app listing. In these cases, we recommend you contact the [Fortellis Engagement Team](#) to have your case reviewed for a viable approach within Marketplace.

For more information on publishing your app in Marketplace, see the resources for [Publishing Apps on Marketplace](#). For each App listing in the Fortellis Marketplace, a \$129 monthly listing fee will apply. For information, visit the [App Listing Fees](#) article in Fortellis Resources

Step 8: Migrating Partner Program Subscriptions to Fortellis

The Fortellis Engagement Team will migrate all existing dealer subscriptions to an ISV's app in the Partner Program to enable a seamless transition to Fortellis with no disruption to dealers consuming the ISV's app. This step will begin and run in parallel with Step 7 (Publish an App Listing in Marketplace) in preparation for pilot testing (Step 9) and the cutover to Fortellis (Step 10).

The Fortellis Engagement Team will provide a list of currently subscribed dealers for products in the Partner Program for your review to ensure alignment. Once we've achieved alignment on the subscription migration, the Fortellis Engagement Team will complete the migration of your existing dealer subscriptions to your app on Fortellis.

Step 9: Pilot Test Your App with Dealers

We recommend that ISVs pilot test their new app integration for a period of one to two weeks with a small number (3 to 10) of their dealers that allows them to cover a variety of scenarios they

commonly experience in the field. The period for pilot testing will vary based upon the complexity of the app integration. ISVs should account for the pilot testing time in their migration plans to ensure they complete their migration on time.

In addition, the subscriptions for all your dealers will be migrated such that you can test connectivity to all your dealers in preparation for the cutover. This will allow for the proactive resolution of any connectivity issues prior to cutover.

Step 10: Confirm Readiness to Cutover to Fortellis in Writing

Upon completion of pilot testing, the ISV will confirm their readiness for the cutover to Fortellis by completing a form provided by CDK. Completion of this step will mark the completion of their migration and drive the timing of the billing transition from the Partner Program to Fortellis.

Monthly Billing Transition

Invoices will continue to be generated from the same billing system that was used for Partner Program billing. The billing transition from Partner Program billing to Fortellis billing will be executed as a single cutover event. A migrating ISV will continue to be billed for the Partner Program up through the cutover month. The ISV will stop having dealers use eStore to enroll in their Partner Program product offering by the 14th of the month prior to cutover and begin using Fortellis Marketplace for all future dealer enrollments in their product.

Below is an explanation of a billing transition example where the cutover is executed on July 1st. The monthly invoice sequence demonstrates how monthly billing will transition from Partner Program to Fortellis.

- **June Invoice – Full month of Partner Program**
 - Partner Program monthly per dealer fees for services in June
 - Partner Program one-time install and history fees up through June 14th
 - Invoice received on or around June 21st
 - *** Note:** After June 14th, all new dealer enrollments on the ISVs products should be completed on Fortellis Marketplace.

- **July Invoice (Cutover Month) – Start Fortellis billing**
 - Fortellis monthly subscription fees for contracted APIs through July 8th
 - Invoice received on or around July 21st

- **August Invoice – Fortellis billing continues**
 - Fortellis monthly subscription fees for contracted APIs through August 8th
 - Fortellis monthly transaction overage fees for contracted API transactions in July (billed in arrears)
 - Invoice received on or around August 21st