



# elead

## **Elead ISV Certification Process Guide**

**Document Version 1.0**

**November 2020**

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## Introduction

### Welcome

Welcome to Fortellis.

We have provided you with a self-serve model that allows you to begin developing APIs.

You can see some of the links below to get more information on the Fortellis Platform.

<https://docs.fortellis.io/docs/general/overview/introduction/>

<https://docs.fortellis.io/docs/tutorials/introduction/introduction/>

To get started:

1. Register a user account on Fortellis.
  - Follow the instructions at <https://docs.fortellis.io/docs/general/overview/getting-started/>.
2. You must create an organization for the app and link your users to that organization:  
<https://docs.fortellis.io/docs/general/organizations/organizations/>.
  - a. Email support@fortellis.io to get the organization approved.
    - You receive an email when a Fortellis Admin has approved your organization.
  - b. Send an email to support@fortellis.io with the username of each of the users registered on Fortellis.

### Provide the name of the organization and the last 6 digits of the organization's entity ID.

3. You must create an app.

Once you complete these steps, Fortellis assigns a Developer Advocate to assist you while you develop and certify your app. Your Fortellis Developer Advocate contacts you for an onboarding meeting with you and your developers to walk-through Fortellis. Fortellis Developer Advocates communicate mainly through email after the walk-through.

## Purpose

This document describes the processes and responsibilities of this partnership in the following areas:

- Development
- Certification
- Deployment

### Definitions, Terms, and Abbreviations

Term	Definition
ISV	Independent Software Vendor

DMS	Dealer Management System
Mock Simulator	Test Endpoint – a way to test an API with canned data.

## Scope

This document details the cooperative activities between members of the Fortellis team and you during the following phases:

- Development
- Certification
- Deployment

## Out of Scope

This document does not address release cycle activities associated with the following:

- Your pilot
- Your general release phases
  - Client installations
  - Training documentation

# General Expectations

## You Must Certify Each Contracted Application

You must certify each contracted app individually. You can design your integration to use a single communication layer for all your apps, but you must certify all apps individually. You can only get a certification for CDK APIs.

# Roles and Responsibilities

## Fortellis

### Fortellis Account Director

Your Fortellis Account Director does the following:

- Develops the business relationship with you
- Maintains the business relationship with you
- Serves as the primary business contact for you
- Advocates for you within Fortellis
- Initiates and executes any change to your agreement with Fortellis
- Serves as a point of escalation for you to address any issues or concerns with Fortellis

## Fortellis Developer Advocate

Your Fortellis Developer Advocate guides and consults you as you integrate and certify your app with the Fortellis APIs.

## Application Design

You should design your apps to address your target market. You should design the app without help from the Developer Advocate. If a particular approach regarding the integration chosen by you is impractical, the Developer Advocate may recommend an alternative approach.

## Application Software Stack

You must choose the following:

- The programming language
- The software stack

Do not expect the Developer Advocate to troubleshoot your app's code. Fortellis provides you with some examples of the request and response in the API Spec. Fortellis is not responsible for assisting you with programming your app. You must provide knowledgeable resources to implement the integration.

# The Certification Process

The Certification Process consists of the three phases listed below.

1. Development Phase
2. Certification Phase
3. Deployment Phase

You must go through the following milestones in the Certification Process:

Milestone	Depends on ISV Deliverable
Development	Use Mock Simulator and access the test environment.
Development Complete and Certification Start	You must provide integration workflow documentation and successfully conduct a complete demonstration of your product's integration with Fortellis APIs.
Certification Complete	You must sign-off on the Certification Test Report.

## Development Phase

You can start development before or after your onboarding meeting. You create an organization and an app, link users to your organization, and walk through the API's available through the contracted order. If you have specific delivery goals, you should discuss the feasibility with your Fortellis Account Director and Fortellis Developer Advocate before making any commitments to a client.

## Documentation Access

You can click on the API and go to the Documentation link in the API Directory to see the documentation on the API.

## Development Environment Setup

You can use your test dealer to access your development sandbox.

## Your Logging Requirements

You should implement logging in your framework. Include the complete request and response payloads for each API transaction. You must do the following with each API call made through Fortellis:

- Capture
- Store
- Provide the `Request-ID`

We need to have the `Request-ID` to troubleshoot issues and provide the transactions of certification. You must do the following with the subscription-ID and the JSON Web Token to keep unauthorized parties from observing or recovering them:

- Obscure
- Mask
- Suppress

Replace sensitive data with a # or another character and mask the data storage using approved encryption methods.

## Ongoing Development Status

You should communicate the status of your development efforts to the Fortellis Developer Advocate on a regularly. Fortellis can then gauge the progress in planning for and scheduling certification of your apps.

## Ensure Product Completeness

Use the Development Phase to compare all API data to your application and product specifications. You may need to change the final software and get additional certifications if you don't compare the data.

## Change Control Process

To request a change to your API access, you must submit a request to your Director. You may need to request additional certification.

## Integration Workflow Document

You must complete the integration workflow document and provide details of how the app uses each API. The Developer Advocate may provide a template.

## Demonstration of ISV Application and Integration

You must do the following when you demonstrate the functionality of your app:

- Show all of the integration functionality
- Match the content of the integration workflow document
- Demonstrate the app with live data
- Demonstrate that the final dealer offering matches the contracted software

- Demonstrate that you have prepared your APIs for general release and certification

## Certification Phase

### Entrance Criteria

You can only start your certification when you have completed the following items:

1. Provide your completed integration workflow document to your Developer Advocate before you demonstrate.
2. Demonstrate your integrated app.

Your Developer Advocate can establish your Certification Start Date when you have completed these.

### Scheduling Certification

You should begin planning the timing of your certification with your Developer Advocate within three weeks of the following:

- Your Development milestones
- Your integration workflow documentation
- Your demonstration of your integrated app

Establish your Certification Start Date with your Developer Advocate. Work with your Developer Advocate to reschedule your certification if needed.

### Executing Certification Testing

You must use the final software that you deploy to clients during your certification.

Your Developer Advocate reviews your Certification Test Plan before the beginning of certification testing.

You can then work with your Developer Advocate to structure the Certification testing to the features that you have implemented.

You should set aside at least 3 to 5 business days for each insert or update API. You may need additional time to correct any defects or make any changes identified during the certification process.

Your Developer Advocate will send a Certification Test Results report to you at the end of your Certification Testing via DocuSign. You must sign-off on your test results to deploy to production.

## Deployment Phase

### Approval for Deployment

You must do the following before the Fortellis Account Director approves your deployment:

- Pay all contractual obligations due through the end of Certification
- Sign-off on the Certification Test Results Report and sign it in DocuSign

### The Deployment Meeting

The Fortellis Account Director schedules a Deployment Meeting where the Fortellis Deployment Manager reviews the deployment process with the following personnel from your organization:

- Development

- Installation
- Support

You must provide an email alias for the Deployment Manager to notify you when dealers have completed the installation process.

Fortellis provides a Support and Installation Guide at this meeting that provides you with the following:

- Contact information for Fortellis Support
- Support escalation procedures
- Specification of the install and uninstall process

### Ongoing Access to Development Environment

You can access the Fortellis development environment for a limited time after your certification. If you need your access to the development environment extended, contact your Account Director to submit the request.

### Production Support Model

You can continue to install your API with the support model in the CDK API Support and Installation Guide – Fortellis Platform document that your Fortellis Account Director gives you at the Deployment Meeting. You have the Deployment Meeting once you have completed your certification. You are the first line of support for your clients. You initially provide comprehensive troubleshooting to determine if the issue is with your API. If it is not, you must open a production support case with Fortellis. You should not instruct the dealer to contact Fortellis directly.

Provide the following information when submitting a support case to Fortellis:

- The Dealer Organization ID
- The Last 6 Digits of the Subscription ID
- The Dealer Name
- The specific error text received from the API
- A detailed description of the issue
- The specific API and method being called
- The request and response
- The Request ID that supports the issue
- Any additional notes on the troubleshooting steps that you have taken

Please mask or remove the following in your requests to Fortellis support:

- The authentication API key and secret
- The full subscription ID
- The token

### Ongoing Integration Changes and Enhancements

Update your documentation and upload it to your developer account to show it in the API Directory when you update to your API implementation.