FORTELLIS

Automotive Commerce Exchange™

FORTELLIS APP LAUNCH GUIDE

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Welcome to Fortellis!

Our Fortellis team provides you with a self-serve model that lets you create and market applications on the Fortellis platform.

Purpose

This document describes the processes you need to follow to certify your Apps for the Fortellis platform. The roles responsibilities of Fortellis team are outlined and are organized to help you as you develop your App.

Definitions, Terms, and Abbreviations

Term	Definition
ISV	Independent Software Vendor
DMS	Dealer Management System

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

Fortellis Roles and Responsibilities

The Fortellis team provides support as outlined below.

Fortellis Engagement Office

The main purpose of the Fortellis Engagement Office is to serve as the business guide and consultant for ISVs as they develop and integrate the Fortellis APIs into applications designed for the Fortellis platform. The Fortellis Engagement Office will assign you a Fortellis Developer Advocate once you have met the qualifications to begin the certification process (outlined below).

Fortellis Developer Advocate

Your Fortellis Developer Advocate guides you through the certification process for your App on the Fortellis platform.

The Developer Advocate will review your workflow and reach out to schedule a Demo call for developing and testing your App for the certification process.

The Fortellis Application Launch Process

The Fortellis Application Launch process consists of the following three phases:

1. Development phase
2. Certification phase
3. Deployment phase

Each phase has a milestone that you must pass before you can move on to the next phase in the Launch Process:

Phase	Milestone (dependent on ISV deliverable)
Development	Use of provided test environment for making calls that test the App's functionality.
Development Complete	A completed Integration Workflow document has been provided to the Fortellis Engagement Office, and you have submitted your Fortellis Marketplace App Listing for Approval.
Certification	A successfully conducted end-to-end demonstration of your product's integration guided by the Fortellis Developer Advocate.
Certification Complete	A Certification Test Report has been electronically sent by the Developer Advocate and has been returned with your signature.

Deployment	Certification sign-off complete, as noted above. Marketplace APP listing is approved and published. All of your contractual obligations have been paid in full. You complete the instructions in the Deployment email.

Development Phase

You can start the Development phase once you have registered an APP and have been given access to a test environment.

Application Design

While you should design the App without input from the Fortellis team, it's worth noting the most successful Apps are those designed to meet the specific needs of their target market. If a particular approach regarding the integration chosen by you is impractical, the Developer Advocate may recommend an alternative approach.

You will want to review the following resources before moving forward:

https://docs.fortellis.io/docs/tutorials/app-toolbox/create-an-app/

https://docs.fortellis.io/docs/tutorials/app-lifecycle/app-lifecycle/

Before you begin coding your App, you must choose the following:

- The programming language for the App
- The App's software stack

Logging Requirements

We require you to implement logging in your framework to capture and store the complete request and response details (including headers and payloads) for each API transaction made by your App.

You will need to be able to provide the logs as part of your certification process.

To help troubleshoot any issue, Fortellis needs the `Request-Id` of the involved call(s) plus the request and response logs.

Token Requirements

You must do the following with your JSON Web Tokens to keep unauthorized parties from observing or recovering them:

- Obscure
- Mask
- Suppress

Replace sensitive data with a hashtag (#) or another character, and mask data storage locations using approved encryption methods.

Troubleshooting

While the Fortellis Engagement Office and Developer Advocates can help review feature sets, they cannot help troubleshoot the functionality of your App's features and ecosystem. The troubleshooting will be contained to investigating CDK API concerns and errors. By contract, Fortellis cannot assist with the coding of your App, and your team is responsible for the resources needed to implement the application in your design.

Each API on the Fortellis platform provides an API Spec that includes example request and response code, and many APIs also include a *Developer's Guide* with added details. Contact the Fortellis Engagement Office if you find these resources to be inadequate for the API you are using.

Documentation Access

Review the documentation for an API by signing into Fortellis.io and finding the API in the **API Directory** on the Fortellis Developer Network, navigating to the **Documentation** tab, and opening the available API Spec and associated *Developer Guide*.

The Integration Workflow Document

You must complete the Integration Workflow document by updating the utilized methods and use cases. This document was included in your welcome package.

The Fortellis Marketplace App Listing

You must complete the Marketplace App Listing and submit for review.

Additional information on this process can be found here: https://docs.fortellis.io/docs/tutorials/app-lifecycle/app-submission-form/

Once the Workflow has been accepted by the Fortellis Engagement Office, and your Marketplace App Listing has been submitted for review, the Fortellis Engagement Office will place you in a queue for the next available Developer Advocate to begin the Certification Phase.

Certification Phase

Fortellis certifies only the applications that use the CDK APIs provided on the Fortellis platform.

Take note that you must certify each contracted App individually. While you can design your integration to use a single communication layer for all your Apps, you must still individually certify all underlying Apps.

The certification phase begins when you have completed your development and have returned your updated workflow document to the Fortellis Engagement Office.

You will be placed in a queue for the next available Developer Advocate. The Developer Advocate will do an in-depth review of the workflow document.

Your Developer Advocate will reach out and establish the next steps in the certification phase, once they have completed the workflow review and have designed a certification test plan based on the workflow submitted.

As part of the certification, you will need to complete a demonstration of your App and integration.

Demonstration of ISV Application and Integration

To certify your App, you must give an end-to-end demonstration of the App's functionality. During this demo, you must:

- Show all the integration functionality
- Match the Integration Workflow document to the functionality of the App
- Demonstrate the App with real-time transactions. I.E cannot be screen shots

The Certification Test

You must use the final software that you will deploy to clients during the Certification Testing.

Your Developer Advocate will guide you through the certification testing, in a controlled and structured manner.

We suggest setting aside anywhere from one to five business days for certification. You may need additional time to correct any defects or make any changes identified during the certification process.

When the Certification Testing is complete, your Developer Advocate sends you a Certification Test Report via DocuSign. You must sign-off on your Certification Test Report before your Marketplace App listing can be approved for Publishing. Once you Marketplace App Listing is approved and published you will be able to move to the deployment phase.

Deployment Phase

The Deployment phase begins once you have signed your Certification Test Report, published your Marketplace App listing, and your contractual obligations have been paid in full.

The Deployment Process

A Fortellis representative will verify the above milestones have been completed, they will then reach out to guide you through the deployment process. As part of the deployment, they will ask you to provide the following:

- **Email Address / Distribution List** - to be used for updating you via email about orders, support and install cases.
    - Typically, this is a **DISTRIBUTION LIST**, especially if there are multiple people that need to see when a dealer is installed or if you have multiple support folks looking at cases.
- **Support Phone Number** – needed so that we can either contact you if there is an emergency (like a performance issue) or we can direct dealerships to contact you.
- **ServiceConnect Administrator** - First Name, Last Name, Email Address
    - This needs to be a specific/named person (cannot be a distribution list) that will be considered your main contact for opening/reviewing support cases (ServiceConnect is CDK's case Management System).
    - As the ADMIN - this person will also be able to add other ServiceConnect users

Once this information has been received you will receive a deployment email containing important documents and videos outlining your support and dealer onboarding details. A review of these items is required to ensure prompt dealer activation and support.

You will need to communicate the deployment process with the following personnel from your organization:

- Development
- Installation
- Support

Production Support Model

Once your App is deployed on the Fortellis platform, your organization is the first line of support for the clients of the App. It is your responsibility to provide comprehensive troubleshooting to determine whether the issue is with your App. If you find your App is not at fault, open a production support case via ServiceConnect. Do not have the dealer contact support for help on your behalf, as this will result in delayed support for you.

Refer to https://docs.fortellis.io/docs/tutorials/app-lifecycle/service-connect/ for additional details.

Ongoing Access to the Development Environment

After deployment you will continue to have access to the Fortellis development (sandbox) environment.

Ongoing Integration Changes and Enhancements

To request a change to your previously certified Workflow, please update your workflow, highlighting the changes and submit a request to the Fortellis Engagement Office. Depending on the workflow changes you have requested, we may request a re-certification for the added functionality at an additional charge.