

FORTELLIS

Automotive Commerce Exchange™



CREATING APP IN FORTELLIS

Fortellis Apps Using Fortellis APIs

Apps on Fortellis are representations of your existing product, with integrations provided by the Fortellis APIs. Each App project allows you to build rich workflow solutions you can sell subscriptions to in the Fortellis Marketplace. This document covers the following key elements for App publisher on the Fortellis platform:

1

Create a Fortellis App within your Developer Network Account

- Create an App project to proof your concept
- Select Fortellis APIs to integrate with your product
- Enable APIs and test your product's integrations

2

Publish Your App Listing in the Fortellis Marketplace

- Build your Fortellis App Listing to promote and sell your product
- Submit your App listing for inclusion on the Fortellis Marketplace
- Co-promote your App listing with the help of the Fortellis GTM team

3

Manage Your Listing Within Your Marketplace Account

- Respond to contact requests
- Setup Monetization via Fortellis
- Enable and disable subscriptions
- Review subscription and API utilization reporting

Getting To Know the Fortellis Platform



- Create an App project to proof your concept
- Select Fortellis APIs to integrate with your product
- Enable APIs and test your product's integrations



Fortellis API Directory

Before you create your first App project, take some time to visit our API directory to find APIs to meet your workflow needs. You can view the pricing for APIs that are generally available by visiting <https://apidocs.fortellis.io/> and navigating to the desired API to view details.

API Directory

ALL APIS

Accessories CDK Partner Program Communications

Parts Management Payments Transportation Vehicle S

These are all the API specifications available to you on Fortellis. Select 'Active APIs' to view on

CDKDrive Repair Orders V1

The API will allow you to query, retrieve, create and update repair orders.

CDKDrive Workshop Management V1 BETA

The Workshop Management API is a collection of lookup functions to be used in the CDKDrive Service Workflows such as Repair Order and



API Directory > CDKDrive Repair Orders v1

CDKDrive Repair Orders v1 API SPEC BUILD WITH THIS API

Vehicle Service | Publisher: CDK Global - Fortellis Development

OVERVIEW SPECIFICATION **PRICING** DOCUMENTATION SUPPORT

API Pricing

Transactional Plan
Based on monthly call quotas.

| | | | |
|------------------------------------|---|---|---|
| \$0/ Call 0-5,000 Calls / Month | \$0.17/ Call 5,001-100,000 Calls / Month | \$0.15/ Call 100,001-500,000 Calls / Month | \$0.13/ Call 500,001-1,000,000 Calls / Month |
|------------------------------------|---|---|---|

Contact the [publisher](#) for custom pricing.

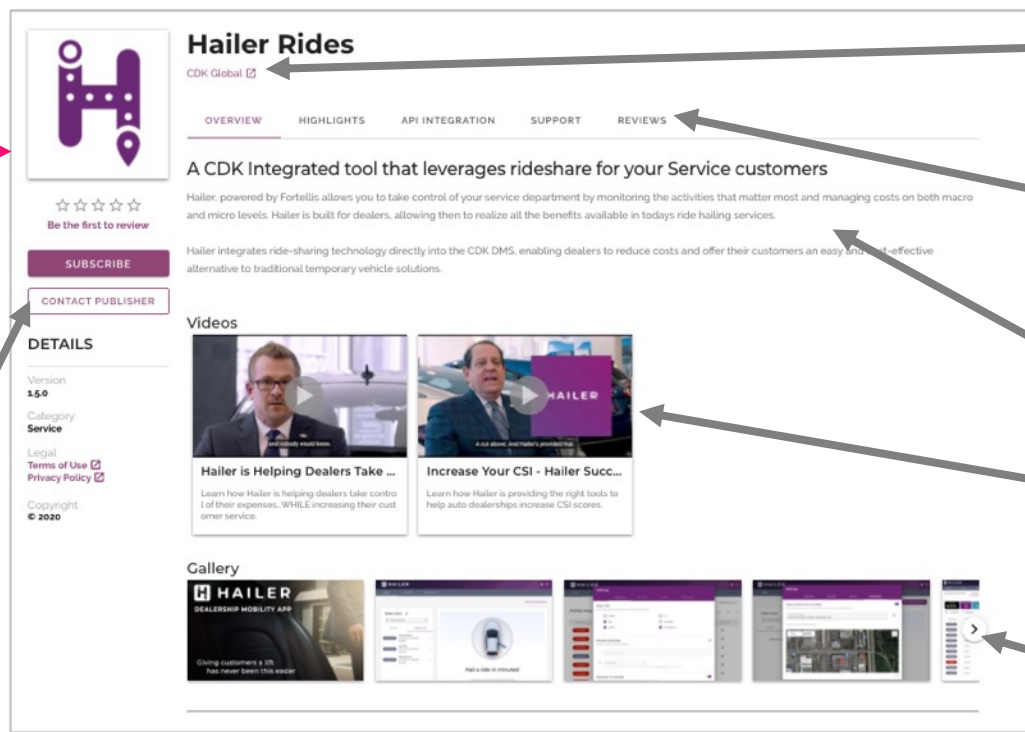
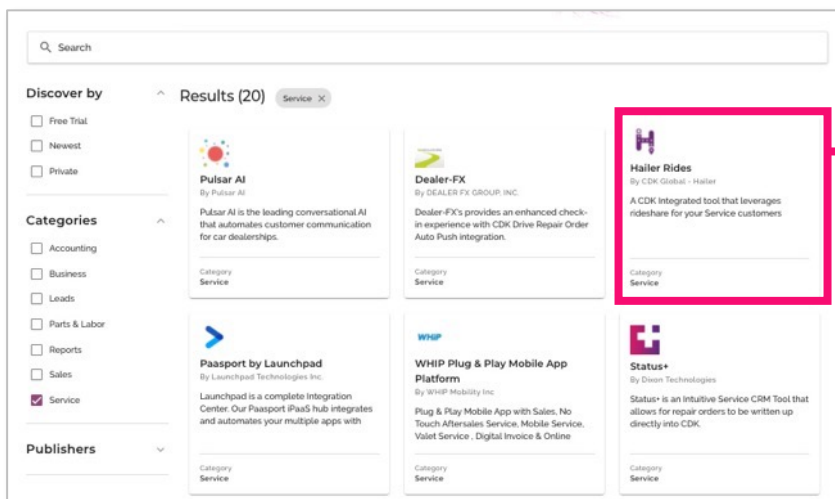
Note: You must have a Fortellis account and be signed in to view pricing or download full documentation for an API



Fortellis Marketplace

Before you create your first App project, take some time to visit the Fortellis Marketplace to see how your App will be presented. The Marketplace allows dealers to find integrations and new solutions to solve their unique needs.

These listings are discovered by category, publisher or key word search <https://marketplace.fortellis.io>



Link to your web site

Displays App Highlights, API Integration and Support Options

App Description Overview

Displays Videos hosted on YouTube

Marketing images and interface images to help the dealer understand your offering.

Note: You must have a Fortellis account and be signed in to use the Contact lead form in a listing



Fortellis Resources

The Fortellis Resource area provides a complete overview for developer as well as self guided tutorials, development guides and a convenient way to search specific topics <https://docs.fortellis.io>

RESOURCES FOR **APP** AND **API DEVELOPERS**

Discover key concepts for submitting your APIs and implementations. Follow step-by-step tutorials to master the basics and learn how to publish apps in the marketplace.

Q Search

+ INTRO TO FORTELLIS
Discover how Fortellis empowers your organization by connecting API and App providers with consumers in a collaborative platform.
[LEARN THE BASICS](#)

+ TUTORIALS
Learn how to submit API specs, become an API Developer, configure security, and create Apps using the Fortellis platform.
[VIEW PLATFORM DOCS](#)

+ API DEV GUIDES
Review detailed product documentation and developer guides including tutorials, sample code, workflows, and technical references.
[VIEW PRODUCT DOCS](#)

Developer Introduction

- Introduction
- App Overview**
- App Lifecycle
- App Tutorials
 - Create Your First App**
 - Consuming APIs within Your App
 - Node.js Implicit Authorization Tutorial
 - Node.js Authorization Code Tutorial
 - Node.js Client Credentials Authorization Tutorial
 - API Developer Overview
 - API Developer Basics
 - Fortellis for API Developers
 - Admin API
 - Connection Management
 - Spec Overview

Create Your First App

Last Updated: 6/9/2021 by Nathaniel Sandberg 7 minute read

You can use this tutorial to get started creating your first app. In this tutorial, we create an app that uses Amazon Web Services and npm to serve car photos for a dealership. You can learn the basic skills to onboard to the Fortellis platform with this tutorial.

Prerequisites:

- Command-line tool
- Free tier of Amazon Web Services
- Installing npm
- Installing Git

Acquiring OAuth Tokens with the Implicit Flow

In this tutorial, we will use the implicit authorization flow. You only want to use the implicit flow in the following apps:

- Single-page apps
- Native iOS
- Native Android apps.

In all these cases, the user can do the following:

- Access the source code
- See any IDs and secrets included in the code

In this example, we will create and deploy a single-page react app.

For more information on authorization flows, see [Authorization on Fortellis](#).

Create Your First App

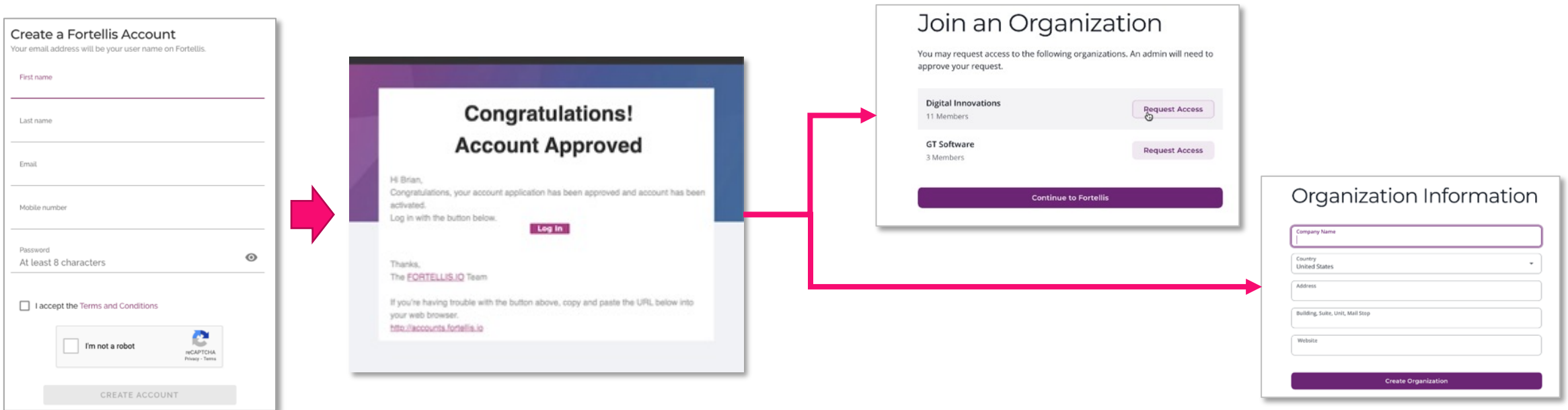
Prerequisites:

- Acquiring OAuth Tokens with the Implicit Flow
- Registering an App on Fortellis
 - Registering the App
- Developing the App
 - Sample App
 - Getting the Sample App from the Repository
 - Starting the Application
- Hosting your App
 - Creating an S3 Bucket
 - Updating the Bucket to Host a Static Site
 - Updating the App in Your Developer Account



Creating an Account on Fortellis

Begin by creating an account from our sign-up page using your business email address. You will receive a validation email to complete your account setup. When you log in for the first time, if an organization tied to your email already exists, you will have the option to join. If no matches are found, you can set up your company as an organization.



Create your Fortellis account now by visiting the following link: <https://accounts.fortellis.io/signup>



Adding a New User to Your Organization

If you need to add new team members to your organization to complete your API listing, log into your Fortellis account and select "Organization Management" from the user menu. Click the "Manage Members" link on the bottom left to open the Members screen. Click on the "Invite New Member" button to add new members. Member requests can be approved and removed within the member grid.

The process is shown in four steps:

- User Menu:** A user profile card for 'User Name' (Organization Name) is shown with a 'Pending' status and a 'Change' button. Below it, the 'Organization Management' option is highlighted in the user menu.
- Organization Management:** The 'Organization Management' page displays user details for 'User Name', including principal information like name, email (support@fortellis.io), phone, website, and address. A 'MANAGE MEMBERS' link is visible at the bottom right.
- Members - Organization Name:** The 'Members' page shows a list of active members. A search bar is present, and an 'Invite New Member' button is located at the top right. The table below shows two active members:

| Name | Email | Last Login | Action |
|-----------|-------------------------|------------|--------|
| User Name | support@fortellis.io | 14/04/2021 | Delete |
| User Name | countactus@fortellis.io | 14/04/2021 | Delete |

- Welcome to the team!:** An invitation confirmation page with the Fortellis logo, a 'Welcome to the team!' message, and an 'ACCEPT INVITATION' button.

Create an App in your Developer Network Account

1

- Create an App project to proof your concept
- Select Fortellis APIs to integrate with your product
- Enable APIs and test your product's integrations

Creating an App in the Developer Network

To create a new App in the developer network, simply log into your developer account and click the “New App” link in the Apps section of the page. Give your App a unique name and description, then select the APIs your App will use.



Register a New App

Complete this form to register your App on Fortellis and start development. For more information on about this form, see the instructions [Registering Your App](#) or contact Fortellis.

App Details

App Name

App Description

Website (Optional)

Callback URL (Optional)

API Integrations
Add API Integrations to your app. (Optional)

Categories

- All Categories
- accounting
- service
- sales
- parts

Publisher

- All Publishers
- CDK Global
- Drive Right Data
- eLead
- MArket Check

API Selection Window

Search Field

- AAIA Vehicle Data Licence Plate
- Cartender Model Video API
- Case Management
- CDKDrive Customer API
- CDKDrive OptCodes V1
- CDKDrive Repair Order V1
- CDKDrive Service Vehicles V1
- Elead Sales Activities
- Elead Sales Customer
- Payment Settling
- MArket Check API 2.0 (Car search)

CANCEL REGISTER

Give your App a unique name and description, then select the desired APIs for your App from the API selection window.

Filter API search results by integration domains

Filter API search results by publisher name

App Name

App Description

App Website

Callback URL

API Key Word Search

API Selection Window

Selecting CDK APIs

Common CDK APIs are available as a bundle. Always include all APIs in your App project for the following:

| API Bundle | APIs to include in your App |
|--|--|
| CDK Drive Repair Order 6 APIs in total | <ul style="list-style-type: none"> • CDK Drive Customers - Find, retrieve, and filter service customers in CDK Drive. • CDK Drive OpCodes - Query opcodes to return description and hours to complete the operation and other data. • CDK Drive Repair Order - Create, query and update repair orders • CDK Drive Service Vehicles - Create, update, query, and retrieve service domain vehicle information in CDK Drive. • Vehicles Specifications API - retrieve vehicle specifications by VIN, vehicle SpecId, make, model or variant • CDK Drive Workshop Management - Query and retrieve dispatch code, dispatch make code, labor type, service advisor, and technician information |
| Elead CRM 4 APIs in total | <ul style="list-style-type: none"> • Elead Product Reference Data - provides details on opportunity, employee and vehicle data • Elead Sales Activities - gives you access to create and complete sales activities • Elead Sales Customers - helps prospect and customer data inside Elead CRM • Elead Sales Opportunities - searches for and retrieves details of sales opportunities inside the CRM |
| Payment Settling 1 API + | <ul style="list-style-type: none"> • Payment Settling - The Payment Settling API may be ideally used with the CDK Drive Repair Order API bundle or with legacy APIs provided through the partner program |

Enabling APIs in Your Fortellis App

As you select APIs from the API selection window, this will form a list below the search tool.? Select the pricing plan and enable each API by agreeing to the terms of use in order to save your new App project.

The screenshot shows the Fortellis API selection interface. On the left, there are radio buttons for API categories: CDK Global, Drive Right Data, eLead, and Market Check. Below these is a 'Selected APIs' section with a table. The table has columns for API, Publisher, Pricing, and Terms. Two APIs are listed: 'Elead Sales Customer' and 'Payment Settling'. The 'Elead Sales Customer' row has 'Select Plan' in the Pricing column and 'Review Terms' in the Terms column. The 'Payment Settling' row has 'Transactional' in the Pricing column and 'Accepted' with a green checkmark in the Terms column. Below the table are four callout boxes: 'API Name' pointing to the API column, 'Plan Selector' pointing to the Pricing column, 'Enable API' pointing to the Terms column, and 'Remove API' pointing to a trash icon. To the right, a modal window titled 'Choose Pricing for Elead Sales Customer' is open, showing two pricing plans: 'Subscription Plan' (Flat rate of Monthly plan of \$ 49.99 per 1 MONTH) and 'Transactional Plan' (Selected, \$0.003/Call (0-6789 Calls/Month), \$0.002/Call (6790- Unlimited Calls/Month)). A 'Save' button is at the bottom right of the modal. A pink arrow points from the 'Select Plan' button in the table to the modal. Another pink arrow points from the 'Review Terms' button in the table to the right, with the text 'Open & Review Terms of Use' below it.

| API | Publisher | Pricing | Terms |
|----------------------|--------------------------------------|---------------|--------------|
| Elead Sales Customer | f5270428-c7ce-41ba-bfe5-8a816393717b | Select Plan | Review Terms |
| Payment Settling | a2d8e794-a2ee-4b59-ae08-06d183b14b6e | Transactional | Accepted ✓ |

API Name

Plan Selector

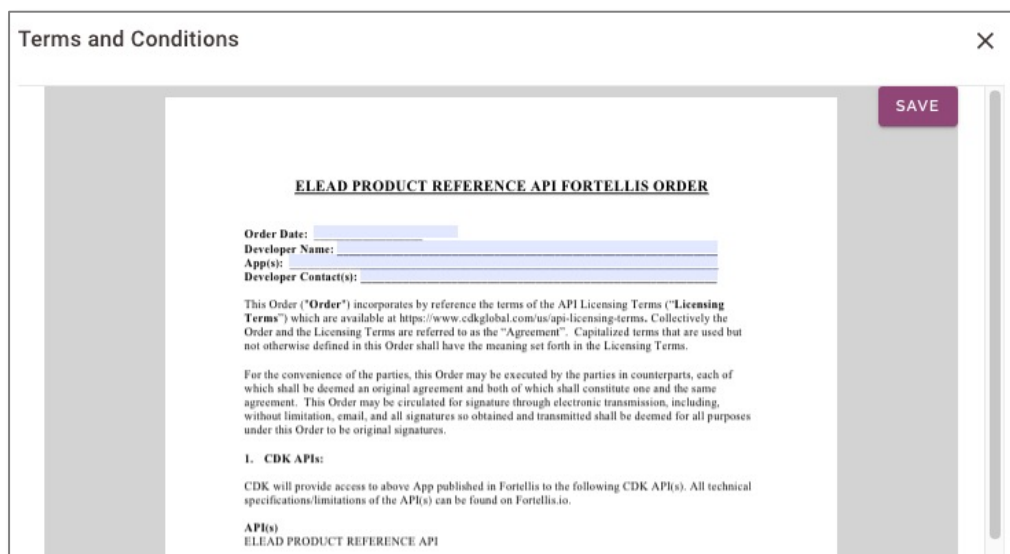
Enable API

Remove API

Open & Review Terms of Use

Accepting API Terms of Use

The initial agreement will load with required fields for you to complete. Complete all highlighted fields and click the "Save" button on the top right. A digital document from by DocuSign will be created. Next agree to electronic records signature and click the yellow "Continue" button.



Terms and Conditions

ELEAD PRODUCT REFERENCE API FORTELLIS ORDER

Order Date:

Developer Name:

App(s):

Developer Contact(s):

This Order ("Order") incorporates by reference the terms of the API Licensing Terms ("Licensing Terms") which are available at <https://www.cdkglobal.com/us/api-licensing-terms>. Collectively the Order and the Licensing Terms are referred to as the "Agreement". Capitalized terms that are used but not otherwise defined in this Order shall have the meaning set forth in the Licensing Terms.

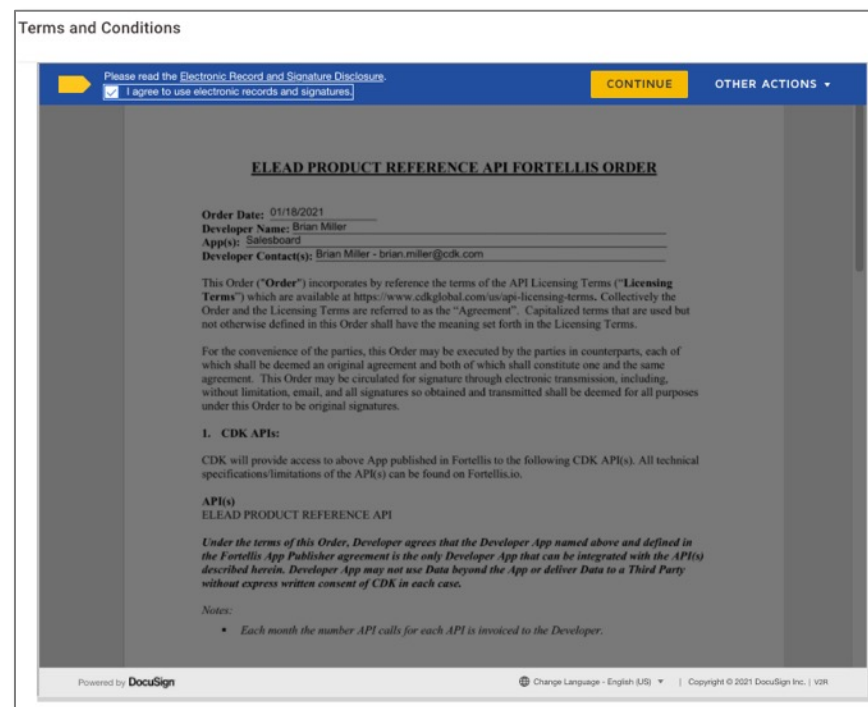
For the convenience of the parties, this Order may be executed by the parties in counterparts, each of which shall be deemed an original agreement and both of which shall constitute one and the same agreement. This Order may be circulated for signature through electronic transmission, including, without limitation, email, and all signatures so obtained and transmitted shall be deemed for all purposes under this Order to be original signatures.

I. CDK APIs:

CDK will provide access to above App published in Fortellis to the following CDK API(s). All technical specifications/limitations of the API(s) can be found on Fortellis.io.

API(s)
ELEAD PRODUCT REFERENCE API

SAVE



Terms and Conditions

Please read the Electronic Record and Signature Disclosure.
 I agree to use electronic records and signatures

CONTINUE OTHER ACTIONS

ELEAD PRODUCT REFERENCE API FORTELLIS ORDER

Order Date: 01/18/2021
Developer Name: Brian Miller
App(s): Salesboard
Developer Contact(s): Brian Miller - brian.miller@cdk.com

This Order ("Order") incorporates by reference the terms of the API Licensing Terms ("Licensing Terms") which are available at <https://www.cdkglobal.com/us/api-licensing-terms>. Collectively the Order and the Licensing Terms are referred to as the "Agreement". Capitalized terms that are used but not otherwise defined in this Order shall have the meaning set forth in the Licensing Terms.

For the convenience of the parties, this Order may be executed by the parties in counterparts, each of which shall be deemed an original agreement and both of which shall constitute one and the same agreement. This Order may be circulated for signature through electronic transmission, including, without limitation, email, and all signatures so obtained and transmitted shall be deemed for all purposes under this Order to be original signatures.

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CDK will provide access to above App published in Fortellis to the following CDK API(s). All technical specifications/limitations of the API(s) can be found on Fortellis.io.

API(s)
ELEAD PRODUCT REFERENCE API

Under the terms of this Order, Developer agrees that the Developer App named above and defined in the Fortellis App Publisher agreement is the only Developer App that can be integrated with the API(s) described herein. Developer App may not use Data beyond the App or deliver Data to a Third Party without express written consent of CDK in each case.

Notes:

- Each month the number API calls for each API is invoiced to the Developer.

Powered by DocuSign | Change Language - English (US) | Copyright © 2021 DocuSign Inc. | VDR

Accepting API Terms of Use

To complete to process, scan through the document or click the yellow "Start" button to be taken to the first place where a signature is required. You will receive a copy of the signed agreement via email.

The image shows a 'Terms and Conditions' document window and a 'Adopt Your Signature' dialog box. The document window has a blue header with 'Select the sign field to create and add your signature.' and buttons for 'FINISH' and 'OTHER ACTIONS'. The document content includes the title 'ELEAD PRODUCT REFERENCE API FORTELLIS ORDER' and fields for 'Order Date: 01/18/2021', 'Developer Name: Brian Miller', 'App(s): Salesboard', and 'Developer Contact(s): Brian Miller - brian.miller@cdk.com'. A pink arrow points from the 'FINISH' button to a download menu. The dialog box, titled 'Adopt Your Signature', has fields for 'Full Name*' (Brian Miller) and 'Initials*' (BM). It includes options for 'SELECT STYLE', 'DRAW', and 'UPLOAD'. A preview shows a signature and initials. A pink arrow points from the 'NEXT' button in the document window to the 'ADOPT AND SIGN' button in the dialog box.

Terms and Conditions

Select the sign field to create and add your signature. **FINISH** OTHER ACTIONS ▾

ELEAD PRODUCT REFERENCE API FORTELLIS ORDER

Order Date: 01/18/2021
Developer Name: Brian Miller
App(s): Salesboard
Developer Contact(s): Brian Miller - brian.miller@cdk.com

This Order ("Order") incorporates by reference the terms of the API Licensing Terms ("Licensing Terms") which are available at <https://www.cdkglobal.com/us/api-licensing-terms>. Collectively the Order and the Licensing Terms are referred to as the "Agreement". Capitalized terms that are used but not otherwise defined in this Order shall have the meaning set forth in the Licensing Terms.

For the convenience of the parties, this Order may be executed by the parties in counterparts, each of which shall be deemed an original agreement and both of which shall constitute one and the same agreement. This Order may be circulated for signature through electronic transmission, including, without limitation, email, and all signatures so obtained and transmitted shall be deemed for all purposes under this Order to be original signatures.

1. CDK APIs:

CDK will provide access to above App published in Fortellis to the following CDK API(s). All technical specifications/limitations of the API(s) can be found on Fortellis.io.

API(s)

Adopt Your Signature

Confirm your name, initials, and signature.

* Required

Full Name* Initials*

SELECT STYLE DRAW UPLOAD

PREVIEW [Change Style](#)

DocuSigned by:
Brian Miller
B41FEA47FF3949C...

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN CANCEL

Note: If you wish to review the document with team members, use the download arrow icon on the top of the screen to download a copy for review.

Reviewing Your App Project

The screenshot displays the 'App Details' section with the following information:

- Description:** This helper API provides data to be used in conjunction with other APIs as needed. This API searches, retrieves and provides the following details to support interaction with other APIs. This helper API provides data to be used in conjunction with other APIs as needed.
- website:** https://appointmentsninja.com
- Callback URL:** https://appointmentsninja.com

Buttons: Download Subscription Report, Edit App

The 'Credentials' section shows:

- API Key:** PIStEZolcFNVOoNnqM6AivBMAIFN7lw6
- API Secret:** ***** (with eye icon and Generate New Secret button)
- Key issue Date:** 29 April 2021 1:39 PM
- Test Subscription ID:** PIStEZolcFNVOoNnqM6AivBMAIFN7lw6 (with view Details and Retry Activation buttons)

The 'API Integrations' table lists the following data:

| API | Publisher | Pricing | Terms | Accepted On |
|----------------------------------|------------------------------------|---------------|------------|-------------|
| CDK Drive Customer API | CDK Global - Fortellis Development | Transactional | Accepted ✓ | 04/29/21 |
| CDK Drive Repair Orders V1 | CDK Global - Fortellis Development | Subscription | Accepted ✓ | 04/29/21 |
| CDK Drive Workshop Management V1 | CDK Global - Fortellis Development | Free | Accepted ✓ | 04/29/21 |

The 'Sell in Marketplace' section includes the text: "All public apps are reviewed by Fortellis for Safety and quality. Submit your app for review after completing your app listing." and a Create Listing button.

After saving your App, you will return to your Developer Network home page. Click on the app to open and review details. Edit as needed, then click the "Create Listing" button to publish your App to the Marketplace.

Edit App includes details such as name & description

Use API credentials to test your App's functions

View API Test Environments and Status Details

Publish Your App Listing in the Fortellis Marketplaces

Publishing Your App Listing in the Fortellis Marketplace

2

- Build your Fortellis App Listing to promote and sell your product
- Submit your App listing for inclusion on the Fortellis Marketplace
- Co-promote your App listing with the help of the Fortellis GTM team

Create an App Listing in Marketplace

App listings help dealers discover your service and subscribe to it. Fortellis App listings also tell API publishers how their APIs will be used, which plays a critical part in any certification process needed. These listings are usually created by a Marketing team member and a Product team member. Each member can access the listings and save their parts within a listing draft. Once a listing is ready, the listing should be submitted by an authorized team member to sign a Fortellis Publisher agreement.



- App Description
- Technical Info
- Subscription Notification
- Training Material
- Screenshots
- Category Info
- Version Info
- Support Info

Product Manager



- Features
- Benefits
- Logos & Tiles
- Videos
- Lead Routing
- Key words
- Terms of Use
- Privacy Policy

Marketing Manager



- Listing Review
- Sign API Terms of Use
- Sign Fortellis Publisher Agreement

Authorized Signer

Starting Your Listing

To list your App in the Marketplace, log into your developer account, open the details of the App you want to list and click the “Create Listing” button on the bottom right.

API Secret ***** Generate New Secret

Key Issue Date 29 April 2021 1:39 PM

Test Subscription ID PIS1EZolcFNVOoNnqM6AivBMAIFN7iw6 view Details [Retry Activation](#)

API Integrations

| API | Publisher | Pricing | Terms | Accepted On |
|----------------------------------|------------------------------------|---------------|----------|-------------|
| CDK Drive Customer API | CDK Global - Fortellis Development | Transactional | Accepted | 04/29/21 |
| CDK Drive Repair Orders V1 | CDK Global - Fortellis Development | Subscription | Accepted | 04/29/21 |
| CDK Drive Workshop Management V1 | CDK Global - Fortellis Development | Free | Accepted | 04/29/21 |

Sell in Marketplace

All public apps are reviewed by Fortellis for Safety and quality. Submit your app for review after completing your app listing.

[Create Listing](#)



App Details

Overview

Highlights

Features

Support

Terms of Use

Pricing Details

Plans

Base Price

Free Trial

Registration Details

API Details

Provisioning

Subscription Notifications

Provisioning Options

Settings

Visibility

Additional Details

App Notes

Status History

Sales Board

Updated: 26 Aug 2020

Withdrawn

Overview

OVERVIEW VIDEOS GALLERY

App Name

Sales Board

App Category

Accounting

Application Area

Search Keywords

Test

Version

V1

Brief Description

Sales tracking

Detailed Description

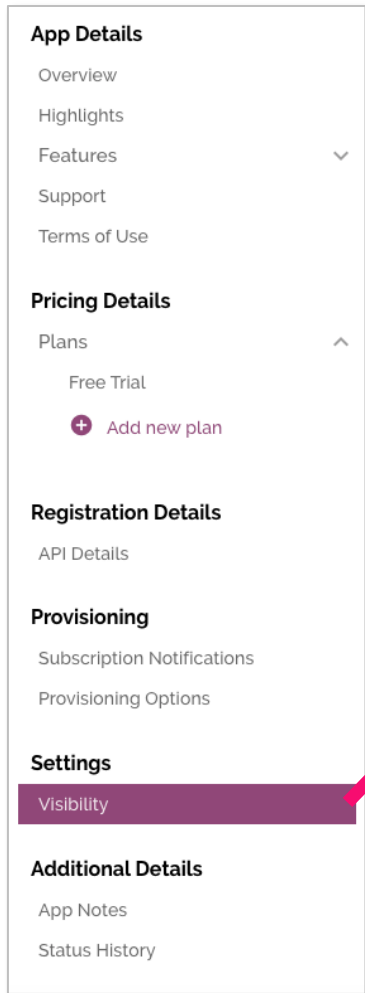
This is all about what it is

Publisher Name

Listing Help Links

- [App Listing Guide](#)
- [Image & Tile Guide](#)

App Listing Types



App listings can be created as “Public” or “Private”. In most cases a Public listing is the way to go. In rare instances where an app will be used only to a select set of users, the listing can be created as “Private” with the ability to invite new subscribers.

Select the “Visibility” link from the listing’s left side navigation menu

The 'Visibility' dialog box is shown with a blue border. It contains the following text: 'By selecting below option, you can control who can see your app.' Below this are two radio button options: 'Public' (selected) with the subtext 'By selecting the above option, you want your app to be visible to all users.' and 'Private' with the subtext 'By selecting the above option, you want your app to be visible only to specific users.' Below the options is a text input field with the placeholder text 'Enter Email Address of people who can view/subscribe your app.'

Public Listing

- Requires all text fields
- Requires image tile
- Requires 3 images in gallery
- Requires support links
- Requires terms of use

Private Listing

- Requires detailed description
- Requires image tile
- Requires terms of use

Listing Overview

The listing overview will allow you to input key elements of your product along with videos from YouTube, and marketing images in the Gallery. All required fields are marked with help icons for guidance. More information can also be found in [Fortellis Resources](#).

App Details

- Overview
- Highlights
- Features
- Support
- Terms of Use

Pricing Details

- Plans
- Free Trial
- + Add new plan

Registration Details

- API Details

Provisioning

- Subscription Notifications
- Provisioning Options

Settings

- Visibility

Additional Details

- App Notes
- Status History

Overview

PREVIEW

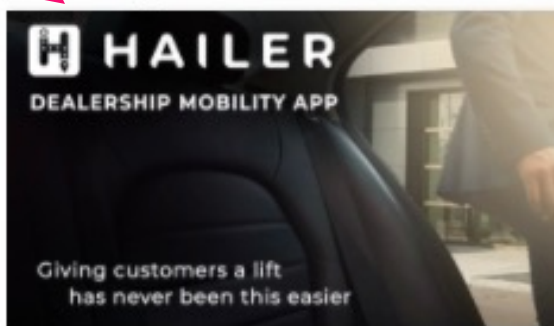
OVERVIEW

VIDEOS

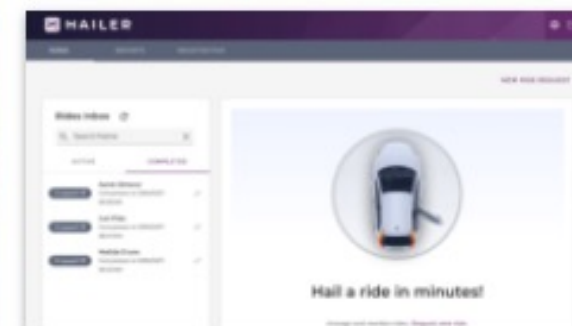
GALLERY



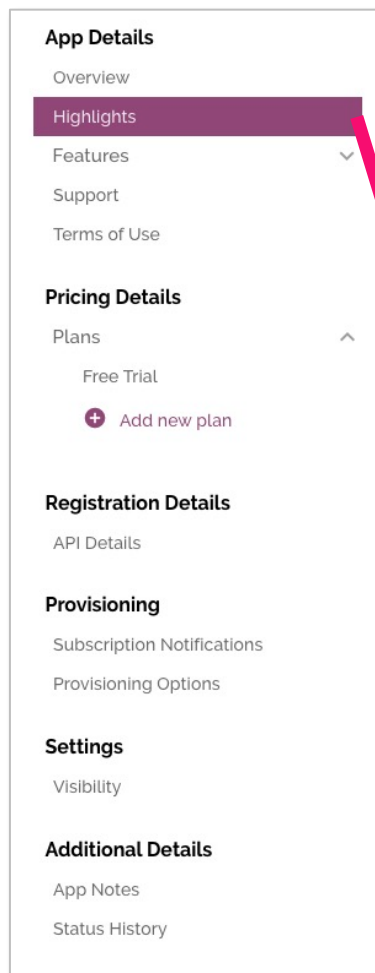
YouTube links should be directed to a public video and may include a title and description



Images can be from marketing collateral or display your App in actions. Images should be in .jpg or .png format at 922px x 518px (16:9 aspect ratio)



Highlights



We recommend a minimum of 3 Highlights for a listing. These Highlights tell about the unique elements of your product offering in simple bullet form. Click on the Add Highlight tool to create a new highlight.



If you wish to remove a highlight, use the trashcan icon on the top right of the Highlight.

Features

Version Updates
What's New

App Details
Overview
Highlights
Features
Pricing Model
Flex Rides
Credit Rides
Detailed Reporting
CDK Integration
Integrated billing
+ Add new feature

Support
Terms of Use

Pricing Details
Plans
Registration Details
API Details
Provisioning
Subscription Notifications
Provisioning Options

We recommend a minimum of 3 Features for a listing. Click on the Add Feature link to create a new feature, and add in a Title, Description and Image. Features appear just below Highlights in your app listing.

Pricing Model

Title *
Pricing Model

Description *
NO UP-FRONT FEES - you pay only the ride price plus a small service fee of 10% of each ride scheduled by Hailer

Image
Recommended aspect ratio - 16:9 and size - 922x518.
Click to upload

Features can also be added to plans, with text appearing in the plan's details when selected by the user. Example: Plan A may have 1 feature where the more expensive "Plan B" may have 3 Features showing more value.

PLANS & PRICING

Pay Per Ride Plan
Billing Type - ONE TIME

Hailer Rides
Pay Per Ride Plan

NO UP-FRONT FEES - you pay only the ride price plus a small service fee of 10% of each ride scheduled by Hailer

Terms of Use

- App Details
 - Overview
 - Highlights
 - Features
 - Support
 - Terms of Use**
- Pricing Details
 - Plans
- Registration Details
 - API Details
- Provisioning
 - Subscription Notifications
 - Provisioning Options
- Settings
 - Visibility
- Additional Details
 - App Notes
 - Status History

Users will agree to your terms of use when subscribing to your App in Fortellis.

We recommend saving your terms of use in .pdf format, then uploading via the “On-Click Acceptance” option.

Terms Of Use

Subscribers must accept a terms of use agreement before subscribing to your app.

Consent Type

One-Click Acceptance
Subscribers view and accept the terms; no signature required.

Electronic Signature
Subscribers view and sign the terms you prepared for eSignature.

Upload Terms

App Terms PDF *

Terms and Conditions

PublisherTermsCond.pdf 1 / 1 100% +

Accept Terms of Service

Provide the following information to confirm acceptance.

Name *

User Name

Title 9 / 40

User Title

Company Name * 10 / 40

User Company 32 / 40

Do you accept?

User enters their name, title and company, then accepts all terms

Support

Version Updates
What's New

App Details
Overview
Highlights
Features
Support
Terms of Use

Pricing Details
Plans

Registration Details
API Details

Provisioning
Subscription Notifications
Provisioning Options

Settings
Visibility


Additional Details
App Notes
Status History

The support page has two tabs:

1 Tutorials and Documents allows you to provide links to support documentation hosted on your web site (not required).

2 Questions and Support allows you to provide a short statement describing how to attain support and 4 different methods to provide this support.

TUTORIALS AND DOCUMENTATION QUESTIONS AND SUPPORT


Title ⓘ
Hailer UI Explained 

19 / 40

URL ⓘ
<https://www2.fortellis.io/hailerlp>

Purpose ⓘ
View screens and learn how easy Hailer is to use

48 / 128

 ADD TUTORIALS AND DOCUMENTATION

Support Message ⓘ
For support with Hailer Rides, please contact our support team via the contact options found below.

99 / 256

Support Center URL ⓘ

Phone Number ⓘ
888-555-1212

Email Address ⓘ *
hailersupport@cdk.com

Support Community URL ⓘ

Plans – Free Trial

You must provide at least 1 plan option to submit an app. To offer a Free Trial, enable this feature, name the trial, include a description and the parameters of the trail offer.

App Details

- Overview
- Highlights
- Features
- Support
- Terms of Use

Pricing Details

- Plans
- Free Trial
- + Add new plan

Registration Details

- API Details

Provisioning

- Subscription Notifications
- Provisioning Options

Settings

- Visibility

Additional Details

- App Notes
- Status History

Free Trial

PLAN FEATURES

Free Trial Plan Enabled ?

Plan Name ?
Free Trial

Plan Description ?

Free Trial Period ? Quantity ?

Days includes Unit of Measure ?

Plans – Adding a Plan

App Details

- Overview
- Highlights
- Features
- Support
- Terms of Use

Pricing Details

Plans

- Free Trial
- + Add new plan

Registration Details

- API Details

Provisioning

- Subscription Notifications
- Provisioning Options

Settings

- Visibility

Additional Details

- App Notes
- Status History

Plans can be added from the left menu. Each plan includes a Title, Description and Configurations. Features can be added to the plan from the features tab.

New Plan

PLAN FEATURES

Plan Name 8 / 20

New Plan

Plan Description 0 / 256

Billing Type Recurring Billing Frequency Monthly

Base Price Quantity Unit of Measure

per month includes

Additional Charges

Price Unit of Measure per per month

Billing can be:

- One Time Free
- Per Transaction

Billing Frequency can be:

- Weekly
- Monthly
- Quarterly
- Yearly

Subscription Notifications

| |
|-----------------------------------|
| App Details |
| Overview |
| Highlights |
| Features |
| Support |
| Terms of Use |
| Pricing Details |
| Plans |
| Registration Details |
| API Details |
| Provisioning |
| Subscription Notifications |
| Provisioning Options |
| Settings |
| Visibility |
| Additional Details |
| App Notes |
| Status History |

You must provide 1 form of notification for new subscriptions, such as, your business email address to receive an email or an API endpoint you host to receive a payload (you can enable both methods).

Email Notification

Email *

support@cdk.com

We will send new subscription emails to the address listed above.

API Notification

By checking this item, we will notify the URL above about new subscriptions.

API Notification Disabled ?

```
{
  "solutionInfo": {
    "id": "sample-id-for-testing"
    "name": "Sample Solution Name"
    "planInfo": {
      "name": "Test Plan"
      "description": "Test Plan Description"
    }
  }
  "subscriptionInfo": {
    "id": "sample-id-for-testing"
    "name": "Sample Solution Name"
    "planInfo": {
      "name": "Test Plan"
      "description": "Test Plan Description"
    }
  }
  "subscriptionInfo": {
    "id": "sample-id-for-testing"
  }
}
```

Note: API notifications will deliver subscription payloads to the URL of your choosing along with an email

Previewing and Saving A Draft

We recommend saving as you go. Different team members may access the listing to update key assigned areas. Click the “Preview” link on the top and bottom right of the screen will allow you to check your progress.

The screenshot shows a preview window for an app listing titled "Hailer" by CDK Global. The app is categorized as "Service" and has a 5.0 rating from 2 customer reviews. The listing includes a gallery of four screenshots showing the app's interface. The "DETAILS" section on the left shows the version as 1.1 and the category as Service. A "CONTACT PUBLISHER" button is also visible.

Preview [Close]

Hailer
CDK Global [Verified]

OVERVIEW | HIGHLIGHTS | API INTEGRATION | SUPPORT | REVIEWS

Hail a ride share for service customers in your dealership. Integrated with CDK Drive.

5.0
★★★★★
2 Customer reviews

CONTACT PUBLISHER

DETAILS

Version
1.1

Category
Service

Legal

Gallery

[Screenshot 1: Hailer app interface showing a car icon and "Hail a ride in minutes"]

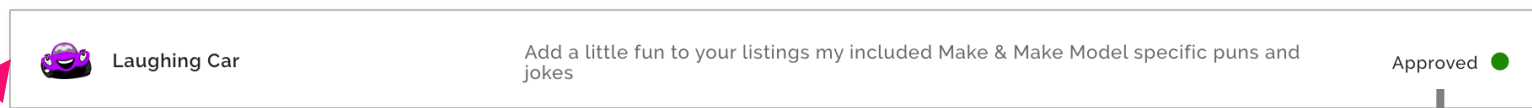
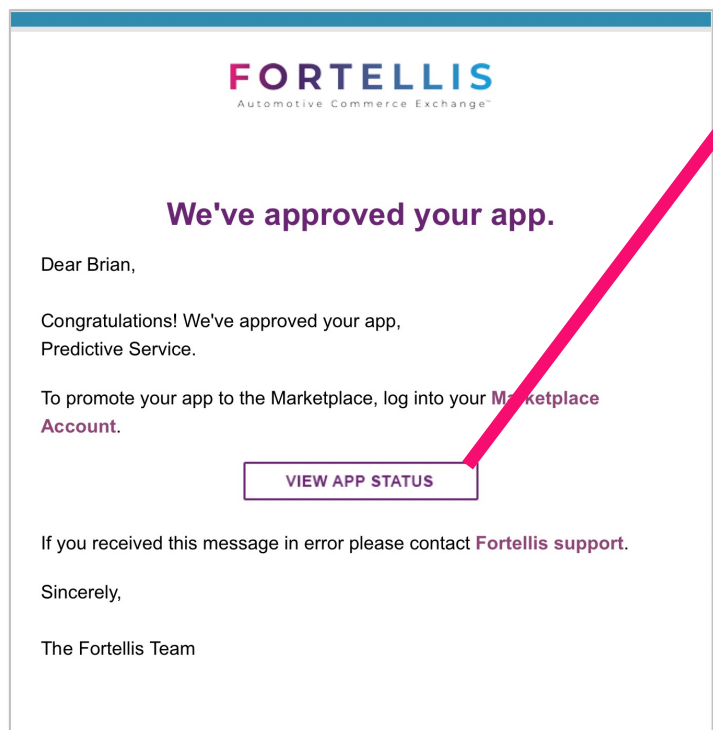
[Screenshot 2: Hailer app interface showing a car icon and "Hail a ride in minutes"]

[Screenshot 3: Hailer app interface showing a list of ride options with prices and estimated arrival times]

[Screenshot 4: Hailer app interface showing a list of ride options with prices and estimated arrival times]

Submitting Your App Listing for Review

Once your listing is ready, click the "Submit for Rearview" button on the bottom right of the page. A team member will review your listing and either approve the listing or return it to you for minor changes required for approval. You will receive a notifications via email updating you in the stages of this process, these statuses also appear in your Marketplace account.

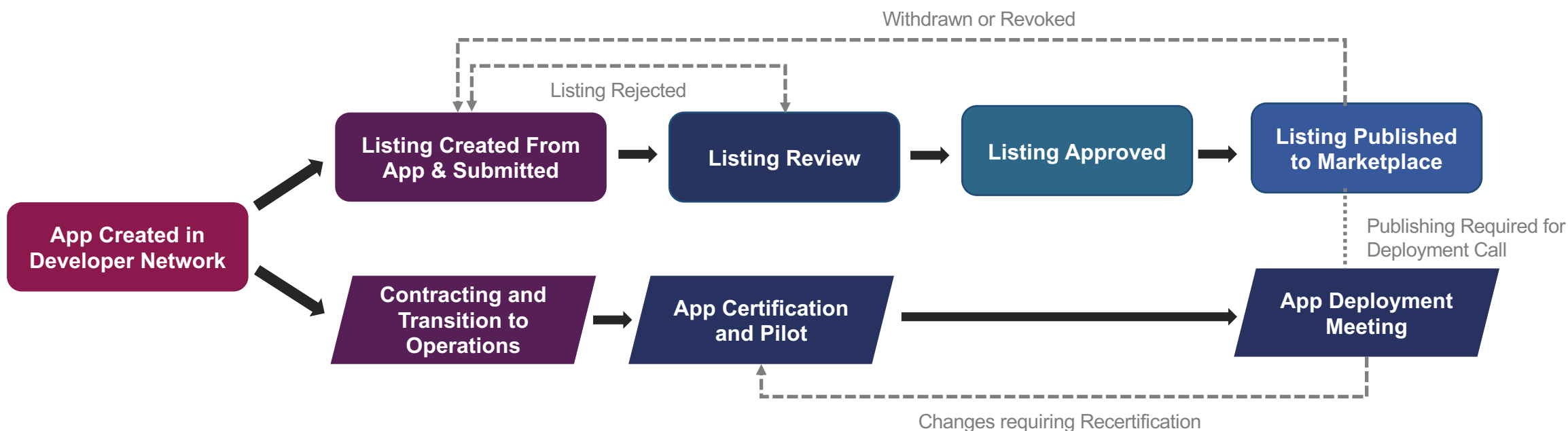


App Listing Status Codes

| | | |
|------------|---------------------------------------|--|
| Approved | ● | Listing is approved and ready for you to publish to the Marketplace |
| Draft | ● | Listing has been created and saved but not yet submitted for approval |
| Registered | ● | The listing has been submitted for review |
| Rejected | ● | The listing was returned for further editing with notes of changes needed in order to be approved for publishing to the Marketplace. |
| Published | ● | The listing has been published and is like in the Marketplace |
| Withdrawn | ● | The listing was taken down from the Marketplace by a user in your organization. |
| Revoked | ● | The listing has been taken down from Marketplace by Fortellis |






App Listings in Marketplace

All App listings in Fortellis Marketplace begin with the creation of an App in the Developer Network, this app is tied to all API integrations and must go through a standard certification process with your development team. Your marketing team will work in tandem to create an App Listing with its own review process. Once the Apps Deployment Meeting is completed, you will be able to publish your pre-approved listing live on the Marketplace and begin accepting subscriptions for CDK dealers.



Promoting Your New Listing

Now that you are in General Release it is time to start promoting your App to potential customers

| Resource | Feature | Benefit |
|---|---|--|
| Marketplace Listing  | A fully functional, branded listing in the Fortellis Marketplace for your App listing with full description, pricing, and support options. | <ul style="list-style-type: none"> • Lead Generation • Dealer Visibility • Industry Exposure |
| Fortellis Insights  | We will publish a blog about your App Listing. This post will be co-written and published on Fortellis insights, including your team member as the author. | <ul style="list-style-type: none"> • Evergreen Promotion • High SEO |
| Tech Connect  | Your App Listing will be featured in our monthly Tech Connect Newsletter sent to thousands of active Fortellis community subscribers. | <ul style="list-style-type: none"> • Community Awareness • Dealer & OEM Visibility • Promote Early Adoption |
| Social Media  | We promote your App Listing on all Fortellis social media channels, linked to Fortellis Blog posts or Marketplace listings | <ul style="list-style-type: none"> • Industry Exposure • Dealer & OEM Visibility • Social Media Engagement |
| Press Release Support  | Our Go-To- Market team will provide support in crafting a press release for your channels that meet the quality standards of both Fortellis and CDK Global. | <ul style="list-style-type: none"> • Industry Exposure • Affiliation with Fortellis • Affiliation with CDK Global |

Manage Your Listing Within Your Marketplace Account

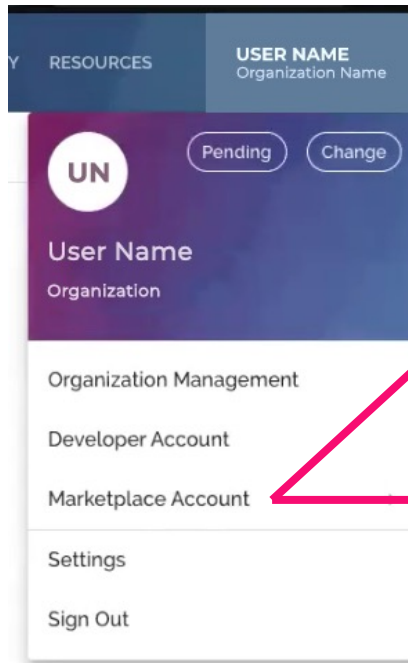
3

- Respond to contact requests
- Setup Monetization via Fortellis
- Enable and disable subscriptions
- Review subscription and API utilization reporting

Your Marketplace Account

To access your Marketplace Account, there are 2 options within the user menu:

- **Marketplace Account -> Apps** - Manage App listings your organization has published
- **Marketplace Account -> Subscriptions** - View and manage integrations for Marketplace Apps your organization has subscribed to



USER NAME
Organization Name

UN Pending Change

User Name
Organization

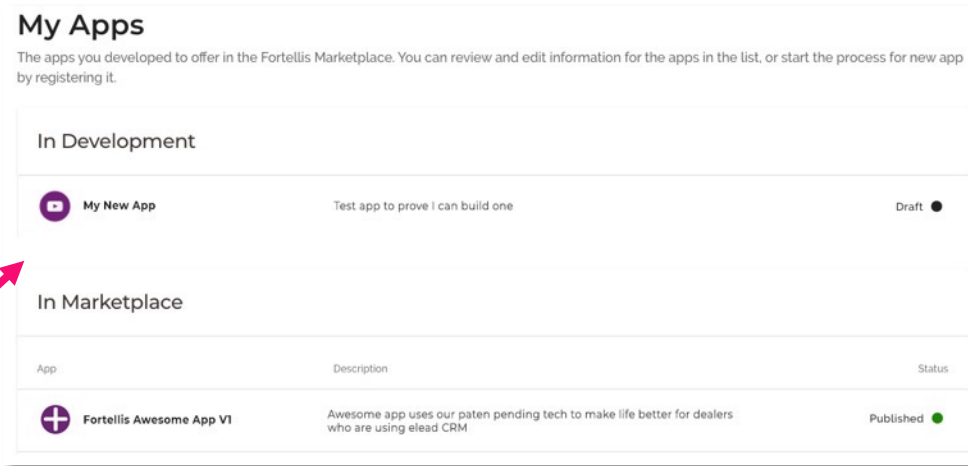
Organization Management

Developer Account

Marketplace Account

Settings

Sign Out



My Apps

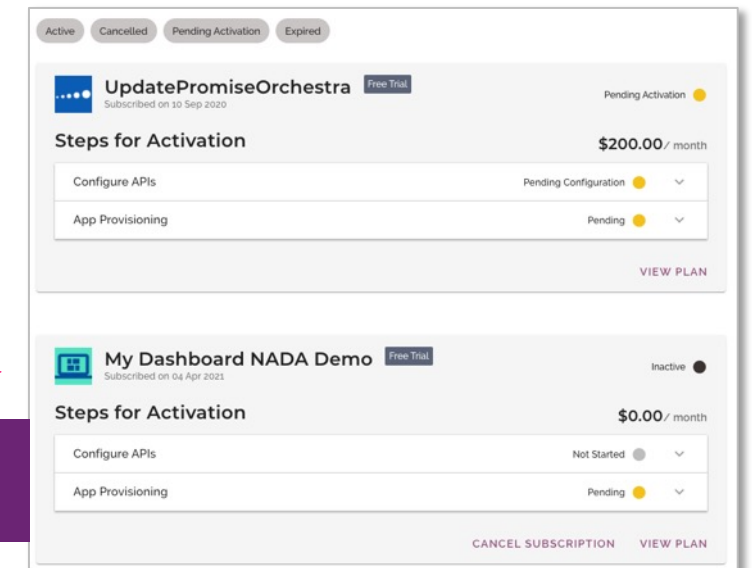
The apps you developed to offer in the Fortellis Marketplace. You can review and edit information for the apps in the list, or start the process for new app by registering it.

In Development

| | | |
|------------|-----------------------------------|-------|
| My New App | Test app to prove I can build one | Draft |
|------------|-----------------------------------|-------|

In Marketplace

| App | Description | Status |
|--------------------------|--|-----------|
| Fortellis Awesome App V1 | Awesome app uses our patent pending tech to make life better for dealers who are using elead CRM | Published |



Active Cancelled Pending Activation Expired

UpdatePromiseOrchestra **Free Trial** Pending Activation

Subscribed on 10 Sep 2020

Steps for Activation **\$200.00** / month

| | |
|------------------|-----------------------|
| Configure APIs | Pending Configuration |
| App Provisioning | Pending |

VIEW PLAN

My Dashboard NADA Demo **Free Trial** Inactive

Subscribed on 04 Apr 2021

Steps for Activation **\$0.00** / month

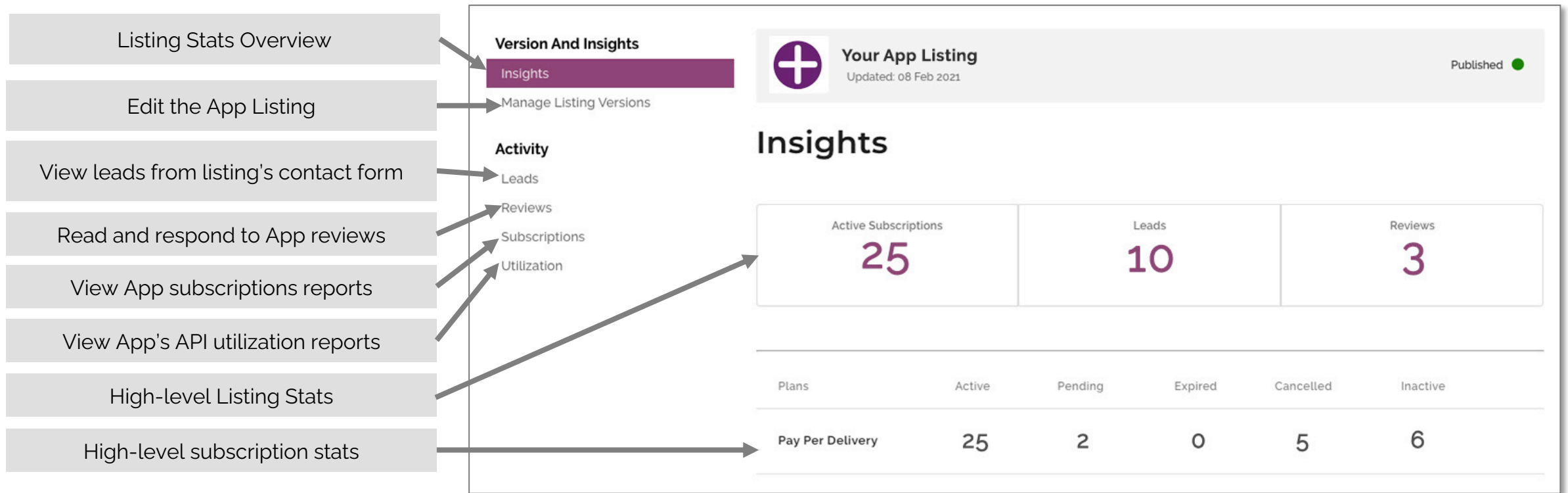
| | |
|------------------|-------------|
| Configure APIs | Not Started |
| App Provisioning | Pending |

CANCEL SUBSCRIPTION VIEW PLAN

Note: The subscription screen is designed for subscribers to manage the Apps they have subscribed to.

App Listing Management

Each App Listing contains a full set of tools to monitor and manage each listing. When you select an App listing, the default page that will appear is the Insights page.



Publishing Your Listing

Once your listing is approved, you can log into your Marketplace Account and publish the listing live. If this is your first listing, you will be required to agree to our App publisher Terms of Use policies.

The screenshot shows the 'Manage Listing Versions' page for 'Hailer Rides'. The app is marked as 'Published'. The current listing version is 4, with an 'Approved' status. The details for Listing Version 4 are:

| App Version | Published date | Published by |
|-------------|----------------|--------------|
| 1.5.0 | 08 Feb 2021 | Brian Miller |

Below the details are buttons for 'PUBLISH TO MARKETPLACE', 'PREVIEW', 'VIEW', and 'RECALL'. A 'History' table shows previous versions:

| Listing Version | App Version | Published date | Published by | VIEW | PREVIEW |
|-----------------|-------------|-----------------------|--------------|------|---------|
| 3 | 1.5.0 | 01 Feb 2021, 08:19 pm | Brian Miller | VIEW | PREVIEW |
| 2 | 1.5.0 | 09 Dec 2020, 05:35 pm | Brian Miller | VIEW | PREVIEW |
| 1 | 1.5.0 | 09 Dec 2020, 05:10 pm | Brian Miller | VIEW | PREVIEW |

A red arrow points from the 'PUBLISH TO MARKETPLACE' button to the right-hand screenshot.

The screenshot shows a DocuSign document signing interface. The document text includes: 'IN WITNESS HEREOF, the parties hereto have executed this Order as of the Order Date.', 'Reviewed & Approved:', 'DEVELOPER Required - Sign Here', 'By: [Signature]', 'Name: SATISH BHAMARE', and 'Title:'. A 'SIGN' button is visible on the left side of the document.

Note: If you wish to edit your listing after it has been approved, click the “Recall” link to continue editing. Recalled listings must be resubmitted for approval before they can be published

Publishing a New Version of Your Listing

Once your listing is published it can not be altered. To update your listing create a new version of the listing as a draft which you can edit and resubmit for approval. Edit this new version of your listing and when you're ready, submit for review. Once approved, you can publish this version to the marketplace, replacing the previous version.

The screenshot shows the 'Manage Listing Versions' interface. At the top, there's a header for 'Your App Listing' with a 'Published' status. Below this, the main section is titled 'Manage Listing Versions' and shows 'Listing Version: 7' with details: App Version 1.5.0, Published date 08 Feb 2021, and Published by Brian Miller. Below the details are buttons for 'VIEW', 'EDIT', 'PREVIEW', 'WITHDRAW', and 'VIEW IN MARKETPLACE'. The 'EDIT' button is highlighted with a red box. A red arrow points from the 'EDIT' button to a text box on the right. A grey arrow points from the 'PREVIEW' button to another text box. Another grey arrow points from the 'WITHDRAW' button to a third text box. Below the main section is a 'History' table with columns for Listing Version, App Version, Published date, and Published by.

| Listing Version | App Version | Published date | Published by |
|-----------------|-------------|-----------------------|--------------|
| 6 | 1.5.0 | 01 Feb 2021, 08:29 pm | Brian Miller |

System creates a copy of the current listing as a draft which you can edit and resubmit for approval.

Preview how the listing will look when published

View the live listing in the Marketplace

Withdraw will take your listing down from the Marketplace. To restore the App listing you will need to submit a new version for review and approval.

Note: Each version of a listing must be submitted for approval before it can be published.

Managing Leads for App Listing

Interested prospects can contact you via the “Contact Publisher” button in your App listing. The form on this listing will be captured as a lead in your listing tool. You will receive a notification when a new lead has been added.

The screenshot displays the 'Your App Listing' interface. On the left, there is a large purple plus sign icon, a 5-star rating with '15 Customer reviews', and two buttons: 'SUBSCRIBE' and 'CONTACT PUBLISHER'. A red arrow points from the 'CONTACT PUBLISHER' button to a 'Contact Publisher' form. The form includes fields for 'User Name', 'Email', and 'Add Message' (with a character count of 0 / 250). Below the form is a disclaimer: 'By clicking Submit, you agree to send your information to the Publisher who agrees to use it according to their privacy policy.' At the bottom of the form are 'CANCEL' and 'SUBMIT' buttons. On the right, the 'Leads' section shows a table with columns for 'Date', 'Lead', 'Email', and 'Message'. A single lead is listed: '14 Jun 2021', 'Brian Miller', 'brian.miller@cdk.com', and 'Does your service include SMS tools...'. A grey arrow points from the lead's email field back to the 'CONTACT PUBLISHER' form. The top navigation bar includes 'Version And Insights', 'Activity', and 'Leads' (which is highlighted).

| ↓ Date | Lead | Email | Message |
|-------------|--------------|----------------------|--|
| 14 Jun 2021 | Brian Miller | brian.miller@cdk.com | Does your service include SMS tools... |

Note: Only registered Fortellis users can contact you via the Contact Publisher form in your App listing.

Managing App Listing Reviews

Fortellis users can rate your App on a scale of 1 to 5 stars. This rating is displayed on your listing along with the ability for perspective users to read other reviews. You can access reviews within your management tool to stay up to date on the latest feedback.

The screenshot displays the Fortellis app listing management interface. On the left, there is a large purple circle with a white plus sign, representing the app listing icon. Below it, five yellow stars are shown, with the text "15 Customer reviews" underneath. Two buttons are visible: a purple "SUBSCRIBE" button and a white "CONTACT PUBLISHER" button with a purple border.

The main interface is titled "Your App Listing" and shows it is "Published" with a green dot. The "Reviews" section is highlighted in the left sidebar. The "Reviews" section includes a dropdown menu for "App Version" and "Listing Version", both set to "All". A review is displayed with a 5-star rating, the name "Brian Miller", and the date "28 Jun 2021". The review text reads: "What a great tool for service! Having the ability to use Lyft has been a big help to our service team, and with the charges going right to the RO, the whole process is easy to use." A trash icon is visible next to the review.

Note: Only registered Fortellis users can review your listing.

App Listing Subscription Reporting

The subscription screen display grid can be filtered or searched for specific subscriptions. Click on a subscription record to open the record details to view, edit, or activate subscriptions.

Version And Insights
Insights
Manage Listing Versions

Activity
Leads
Reviews
Subscriptions
Utilization

Your App Listing
Updated: 08 Feb 2021
Published

Subscriptions

Search X

App Version: All
Listing Version: All

| Entity | Plan | App Version | Listing Version | Subscribed On | Subscription Status |
|-------------------|-------------|-------------|-----------------|---------------|---------------------|
| HH Hometown Honda | Silver Plan | 1.21 | 2 | 6 June 2021 | Cancelled |
| UT Uptown Toyota | Silver Plan | 1.21 | 2 | 10 June 2021 | Active |

Search for subscribers by Fortellis Organization name (Company name)

Results grid filters

Open each record details to perform the following:

- View or Edit API Configurations for the subscription
- Monitor API provisioning
- Monitor API configurations and approvals
- Activate or deactivate the subscription

Note: Only registered Fortellis users can review your listing.

API Utilization Reporting

The subscription screen display grid can be filtered or searched for specific subscriptions. Click on a subscription record to open the record details to view, edit, or activate subscriptions.

The screenshot displays the 'Utilization' section for 'Your App Listing' (Updated: 04 Jun 2021, Published). The interface includes a sidebar with navigation options: Version And Insights, Activity, and Utilization (selected). The main content area shows a summary of API usage for the period 06/01/2021 - 06/28/2021. Three key metrics are highlighted in a grid:

| Metric | Value |
|-------------------|----------|
| Total Subscribers | 4 |
| Total API Calls | 245.5K |
| Total API Cost | \$162.58 |

Below the metrics, there are tabs for 'BY API' and 'BY SUBSCRIBER'. A 'PREVIOUS MONTH REPORT' link is visible. A red arrow points to the bottom of the page, indicating that records appear below that can be opened to view transactions details.

Callouts from the right side of the image:

- Download the previous months full activity report in a .csv format (points to the 'PREVIOUS MONTH REPORT' link)
- Total number of App subscribers (points to the '4' in the Total Subscribers card)
- Total amount of charges for APIs used in the App (points to the '\$162.58' in the Total API Cost card)
- Total number of calls to APIs used by the App (points to the '245.5K' in the Total API Calls card)
- Records appear below that can be opened to view transactions details (points to the bottom of the page)

Note: Only registered Fortellis users can review your listing.

FORTELLIS

Automotive Commerce Exchange™



**QUESTIONS?
INFO@FORTELLIS.IO**