# 2023 Project Guidelines

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## New Functionality

To undertake a system development, Coda will initially gather information on the required change and complete a Project Information Form (PIF) to outline the requested development.

Once the Project Information Form has been completed and agreed the system development will be created on our Teamworks Projects scheduling platform where a developer will be assigned.

## System Enhancement

Should the requested development be seen as a system enhancement and of benefit to the wider use of existing users of the platform, the charges to undertake the development will benefit from a discount to the billable rate of 50%.

## Unique Project

Should the requested development be identified as unique to a particular business process within an organization. It is likely to be of limited appeal to the wider client base of Coda Commerce. Unique projects are charged out at standard billable rates.

## Programing Rates

- Half Day - £350
- Full Day - £700

All of the systems Coda supply have been developed to meet the demand of the clients, should functionality not exsist in the applications we will continue to log suggestions of functionality with a view to undertaking these developments moving forward. Should a development require a more definitive timeframe, a project for new functionality is required using our Project Information Forms.

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## APIs

Web enabled API (Application Programming Interface) enables two systems to communicate data securely and in real time. A benefit of the API over an EDI is the real time response the API enables, where data can be presented and data response can be returned. Developments of APIs between systems requires developer time to support and interact with the corresponding applications developer.

## Inbound Data

To be able to ingest data over API in to any of the systems*, a project will need to be created by completing our Project Information Form. This will be required to outline the scope of the inbound data to ensure the API for Booking / Order provides the required fields for completion to successfully create a Booking or Order.

## Outbound Data

To be able to retrieve data over API from any of the systems*, a project will need to be created by completing our Project Information Form. This will be required to outline the scope of the outbound data to ensure the API has the required fields and functionality .

## API Licensing

Coda will issue a license for all completed APIs to cover the ongoing maintenance of the API within the Coda platform. The API license will be charge per client per month.

## API Fees Rates

- Project Opening - £350 (includes 2 hrs of support and access to the API swaggerhub platform)
- Half Day - £350
- Full Day - £700
- API Licensing - £25 (per account per month)

Approximation of the total Charges for the requested API will be estimated on completion of the Project Information Forms.

Please note: APIs can only be requested by clients of Coda Commerce, the third party application integrating with the Coda Commerce application will be assessed on a commercial and operational basis.

*Systems means Navigator, the Warehouse (WMS) or Routedog applications.

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# *Website Work*

As part of each clients initial set up is the provision to brand the website is included in our set up fee.

As websites are updated it is important to keep your booking platform under the same look and feel.

## Update / Rebrand of standard Portal

Utlising the standard look and feel of the portal layout, we will require a CSS/Template supplied to Coda which incorporates your new websites look and feel.

Coda will apply the CSS to the portal and provide links for your website designer to use to link in the portal.

Login and Tracking field code can be supplied to your designer to incorporate in to the main website pages.

We are happy to utlise your own design icons for buttons on the main portal menu page.

## WordPress Plugin*

Coda can install the standard look and feel of the portal layout in to your WordPress website. This provides your website designer ability to change the non-portal based content within the portal area, such as the use of font types, images on screen and additional content functionality (live chat app). The portal will live inside your website so the url address will as your main domain.

*Coda can supply the WordPress plugin to install yourselves if your website and portal is already running bootstrap and is WordPress enabled – please see notes at the end of this document.

## Bespoke Portal Design

If you wish to engage your website designers and discuss the layout of the portal pages, we can consult on a desired look and feel for the portal pages.

During the consultation we can ensure integrity of functionality and also guide the designers about any changes they wish to aesthetically propose. Once a design is agreed, Coda will need to update the look and feel of the website to reflect the finalised agreed design from the website designers.

## Website Project Fees

- Update / Rebrand of Standard Portal - £350
- WordPress for Coda to Plugin - £350
- Bespoke Portal Design
    - Consultation Process - £350
    - Per day charge implementation - £700

Approximation of the total Charges for the requested website work will be estimated on completion of the Project Information Form and the conclusion of the consultation.

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# Report Requests

Applications (Navigator / Warehouse / Routedog) contain reporting functionality to configure and build reports, however it is entirely possible additional reports which fall outside the scope of the existing reporting mechanisms are required.

## System Reports

If you wish to have a stored report in the company reports area which has a flexible date criteria and a fixed list of column outputs.

## Fixed Specification Routine Report

For larger extracts of system data which are required for business analysts. These reports can be generated at low peak times of the day and delivered by email to a specified contact. The client can choose the column out put and frequency of the report.

## Client Specific Invoice Reports

Invoice CSV / XLS reports can be configured to satisfy client purchase ledger systems. A specification of the invoice is required and when you complete your invoice run, an output from the system can deliver the invoice data.

## Report Request Fees

- System Reports - £350
- Fixed Specification Routine Reports - £450
- Client Specific Invoice Reports - £350

Approximation of the total Charges for the requested Report Requests will be estimated on completion of the Project Information Form.

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# Email Templates

As part of the set up, Coda create a generic email look and feel reflecting your companies brand. However should you wish to further customize this look and feel or at a client level, send emails from the system in the look and feel of another company, email templates can make this happen.

## Template Supplied

If your website designer can create a template in HTML, we can add this to the update status events at a system or client level. In consultation with our admin team we can advise with your designer how to create a design which works with the system.

## Template Creation

If you wish to change the look and feel but do not have a designer to create a template. You will need to supply logos along with any applicable imagery and complete our Project Information Form to outline the guidance of implementation to create a look and feel.

## Report Request Fees

- Template Supplied - £55per hour (min 1hr)
- Template Creation - £350 plus £55 per hour

Approximation of the total Charges for the requested Report Requests will be estimated on completion of the Project Information Form.

Email templates can be implemented in Navigator using the tools provided by a user with an intermediate HTML / CSS understanding.

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## *Administration*

If you wish for Coda to assist in update and moderate aspects of your system, such as Tariff entry.

## Data Entry & System Maintenance

If you would like Coda to enter in Tariffs and undertake general maintenance tasks, we can provide an approximate price on a task by task basis to manage this on your behalf.

## System Update Request

Coda will always look to schedule in system updates to ensure clients are operating on the current version of the application. Our decision making process about which platform to update is based on infrastructure not by client. Should you require an update to the system this can be requested where a timeframe will be provided.

## Administration Fees

- Data Entry & System Maintenance - £55per hour (min 1hr)
- System Update Request - £700

Approximation of the total Charges for the requested data entry and system maintenance will be estimated on completion of the Project Information Form.

## Cyber Security / InfoSec Consulting

Should you wish to become ISO, participating in a tender process or Cyber Security review, businesses & organisations are issuing Information Security (InfoSec) Questionnaires as part of supply chain compliance of personal data and IT security.

Coda have partnered with GDPR / Cyber Due Diligence Support Consultants to conduct a review of our software applications and procedures. With this understand of the Coda business we can refer Info Sec questionnaires to the consultants for professional and accurate replies.

Charges start from £300 plus vat.

Please enquire about this service if you are tendering or participating with a cyber security review with your clients.

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# Navigator Credits

Within the Navigator application there are a number of optional functions which can enhance the system functions:

- PAF Online
- Online Agent Labels
- CX API
- RDN (Remote Driver Network)

## PAF Online

Enable your clients to use the Royal Mail PAF look up online via the customer booking portal.

## Online Agents Labels

Enable your clients to book online and directly produce a carrier label either directly to a Thermal Printer or to PDF.

## CX API

We now have a full integration of load tendering, Load Confirming and Tracking including POD with Courier Exchange.

## RDN Remote Driver Network

Remote Driver Network covers the Pay As You Go subscription of the Navigator Mobile driver application.

## How to activate Navigator Credits

In your Navigator application visit:
Accounts > Navigator Credits > Select quantity of Credits to purchase > Order

Please contact support@codacommerce.co.uk if you are not presented with credit values in the drop down menu.

For more information on the CX API and RDN functionality please visit our Coda Help documents:

https://help.codacommerce.com

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## *Notes:*

### APIs

Attached to this information is an API guideline / information sheet for you obtain an understanding of what an API is and what the Coda API can achieve. This should assist you when you have an introductory conversation with your client about setting up an API.

API functionality maybe be limited to the version of the system you are running (an update maybe required).

### WordPress Plugin

The WordPress plugin main benefit allows for the seamless integration of your Navigator online portal to live within your website, as opposed to a static template representing your website on an external web address.

Stages required to enable the WordPress plugin:

1. Your Navigator system needs to be the current version of Navigator which supports having a WordPress plugin.
2. *Should you have a WordPress website and you are now on the current version of Navigator* – Coda Commerce will need to move your online portal from the static based version (most likely in place from the legacy of your current or previous website) on to the WordPress plugin enabled portal.
3. Once the portal is running with the WordPress plugin installed, Coda can supply you access to the plugin so it is possible for future changes to your company website can be completed without development / intervention from Coda Commerce. Please note should you wish to change the design of the portal layout, this will always need to be undertaken in consultation with Coda Commerce – see Bespoke Portal Design.

### Email Template

For Navigator users it is not a necessity for Coda Commerce to implement the email templates. The functionally exists within the application for you to undertake the full implementation of the email templates. Coda are happy to provide guidance on implementation or should you require assistance with implementing a design we can provide a quote.

### Charges

All charges are subject to VAT at 20% (unless you are a client outside of the UK).

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# API Guideline / Information

## What is an API?

API stands for **A**pplication **P**rogramming **I**nterface. Don't worry about the AP, just focus on the I. **An API is an interface**. You use interfaces all the time. A computer operating system is an interface. Buttons in an elevator are an interface. A gas pedal in a car is an interface.

An interface sits on top of a complicated system and simplifies certain tasks, a middleman that saves you from needing to know all the details of what's happening under the hood. A web API is the same sort of thing. It sits on top of a web service, like Twitter or YouTube, and simplifies certain tasks for you. It translates your actions into the technical details for the computer system on the other end.

## What is a web API?

There are lots of different flavours of web API. One of the most common, and most accessible to non-programmers, is called a REST, or RESTful, API. From now on, when I say "web API" I mean a REST API. If you want to nit-pick, there are other kinds of web API. But why would you want to do that?

**A web API is an interface with URLs as the controls.** In that respect, the entire web is a sort of API. You try to access a URL in your browser (also known as a **request**), and a web server somewhere makes a bunch of complicated decisions based on that and sends you back some content (also known as a **response**). A standard web API works the same way.

The key difference between an ordinary URL and a URL that's part of a web API is that an ordinary URL sends back something pretty designed to look good in your browser, whereas **a web API URL sends back something ugly designed to be useful to a computer**.

When you request the URL http://twitter.com/ in a browser you get back a nice-looking webpage with a bunch of colours and pictures and buttons. It's designed for a human to look at and for a browser to draw on a screen. But it sucks if what you want is to gather and analysing data. The structure of the underlying document is very confusing and inconsistent. It's hard to extract the bits you care about, and it doesn't provide you information in bulk.

When you request this web API URL instead, you get back an ugly-looking chunk of plain text with no decorations:
https://api.twitter.com/1.1/statuses/home_timeline.json

It's designed for a computer to read. It sucks if what you want is to look at some tweets while you drink your morning coffee, but it's great if you want to extract and analyse tweets and their metadata, especially if you want to extract a lot of them at one time.

**Web APIs are a way to strip away all the extraneous visual interface that you don't care about and get at the data.** In the same vein, you can often think of them as a limited shortcut into a web service's database. Twitter won't just let you log in to their internal database and poke around

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(unless you work there), but they will give you an easier way to access it in certain limited ways using an API.

Why would I want to use a web API?

1. To **get information that would be time-consuming to get otherwise**. Most often, you *could* get some data from a website manually. You could sit there and click through 100 pages and copy/paste it into a spreadsheet (or make your intern do it). If you're a programmer, you could spend a lot of time figuring out how a page is structured and write a custom scraper to get the data out. Either way, it would take a long time and be really aggravating. In cases like this, an API is a time-saver that lets you get what you want quickly instead.
*Example: you want every public photo on Flickr that has the tag 'maui,' was taken with a Nikon camera in 2012, and is wider than it is tall. You could sit there and run the search on Flickr, and then click through all the results one at a time, finding the right ones and copying them to a list. It would take hours. If you use the Flickr API, you can get much more specific about what you want, and instead of getting back a gallery you have to click through one-by-one, you get back a big text list with all the details.*

2. To **get information that you can't get otherwise**. Sometimes web APIs give you a way to access information that doesn't exist on the normal web, stuff that's in a database attic some-where or that's hidden from normal users because normal users wouldn't care about it (as a journalist, there are probably lots of things you care about that a casual web user doesn't).
*Examples: Twitter might not display tweets before a certain date on its website, but still allow you to download them via the API. The Rotten Tomatoes API might give you extra metadata on release dates that's not displayed on the website.*

3. To **automate a news app that needs live data** from other sources.
*Example: you want your Super Bowl coverage to include a live stream of every Instagram photo taken near the stadium.*

4. To use it as a **more direct interface for reading and writing data to a service**.
*Example: you use MailChimp to manage all of your mailing lists. You want to be able to auto-matically add and remove people from lists when certain things happen instead of someone having to manually manage those lists.*

Reasons #1 and #2 are both ways in which a non-coding journalist can still make their life easier by retrieving data in bulk or with great specificity. Reasons #3 and #4 both generally require some pro-gramming savvy.

*This information was sourced to be helpful and allow an understanding in general terms of what an API is. This information originated on School of Data "Web APIs for non-programmers"*
https://schoolofdata.org/2013/11/18/web-apis-for-non-programmers/

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## Navigator API outline

This is the current scope of the Navigator API and forms the basis of what functions you can discuss with your client.

**RESTful Web API supporting both JSON and XML**.

## Available Services

Create a job / booking
- Services cover for Sameday, Overnight & International Bookings.
  - o Pick up Date
  - o Collection & Delivery Address Data
  - o Job References (PO / Booked by / Ref 3 / Ref 4)
  - o Customs Values
  - o Commodity Description
  - o Dimensions
  - o Pieces
  - o Weight
  - o Overnight Services (Next Day etc)
  - o International Service

Cancel job booking / Consignment
- Currently only served in XML

Coda Commerce are continuing to further develop the API functionality, should functionality not exists in the applications we will continue to log suggestions of functionality with a view to undertaking these developments moving forward. Should a development require a more definitive timeframe, a project for new functionality is required using our Project Information Forms.