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Description automatically generated API ACCESS QUESTIONNAIRE

Thank you for your interest in integrating with the Docmail API. To allow access to our live and test environments, firstly we would like to ask you a few questions about your intended use and implementation.

Before completing this questionnaire please may we recommend reviewing the API help guide and our helpful list of Do’s and Don’ts which can also be found in the guide. Please also see our Terms and Conditions and Fair Usage Policy if you intend to utilise our API.

Once you have completed the questionnaire please return it to [**docmailsupport@cfh.com**](mailto:docmailsupport@cfh.com) for review. If you have any questions or require support please do not hesitate to contact our customer service team on 01761 409701 or [**docmailsupport@cfh.com**](mailto:docmailsupport@cfh.com) and who will be happy to assist.

|  |  |
| --- | --- |
| Company Name: |  |
| Contact Name: |  |
| Telephone: |  |
| Email: |  |

|  |  |
| --- | --- |
| What environment are you looking to access? Test  Live  Please confirm your test account number:  (Please note live can only be applied for once application has been through test) | ☐  ☐  ZDM… |
| What is your anticipated number of items being sent per day?  At launch:  Peak volumes within the next 12 months: |  |
| How will your data be formatted? A single mailing for each item being sent  A multiple address PDF stream  Document template(s) supplied with each mailing  Library documents being pulled for each mailing | ☐  ☐  ☐  ☐ |
| Will the document layout vary per mailing?   No, the same document layout(s) will be used on each mailing  Yes, unique documents can be supplied for each mailing | ☐  ☐ |
| Will the user be viewing and approving a proof? No, the submission will be automated  Yes, every mailing being sent will be checked  Some proofs will be checked, please give details: | ☐  ☐ |

|  |  |
| --- | --- |
| When will items be sent? Once per day  Whenever the user creates them  At fixed times (please specify) | ☐  ☐  ☐ |
| How will items be sent?   Collated and sent via a single system interacting with the API  Sent from disparate instances interacting with the API | ☐  ☐ |
| Will you be using data intelligence? No  Yes, on items added to the mailing  Yes, set-up on library mail packs  Yes, adding a library mail pack and then adding rules to each mailing | ☐  ☐  ☐  ☐ |
| How will you interact with the API? Using individual calls for each mailing step  Supply a zip file | ☐  ☐ |
| How will you monitor mailing progress? Through call-back URLs  Through call-back emails  Through polling the API  Mailings will be submitted but not monitored | ☐  ☐  ☐  ☐ |
| How will you supply security credentials?   User name and password with each call    Calling GetUserLoginKey and passing a security key to each call | ☐  ☐ |
| Which of the following error scenarios will be trapped in your API integration: Invalid login credentials (yes / no)  Validation failure in supplied data (yes / no)  Process mailing errors (yes / no)  Insufficient credit (yes / no)  If you have answered “no” to any of the above please, give details as to why these are not required: | ☐  ☐  ☐  ☐ |
| 1. The “Customer application” must identify the source system that is creating  the mailing, please specify the “Customer application” you are supplying.   Note that if you wish to supply a version number for you application then please supply an example version number: |  |