**Documentation Package – Sample Template**

*Use this structure as your* ***mandatory*** *attachment when submitting a Process Mining App Template. Paste into a Word / PDF file, fill in the grey placeholders, and attach the finished document to your listing.*

**1 | Template Identification (mandatory)**

| **Item** | **Value** |
| --- | --- |
| **App Template Name** | *Salesforce Incident Management* |
| **Version** | *v1.0 (June 2025)* |
| **Source System(s)** | *Salesforce Service Cloud* |
| **Extraction Tool** | *CData Sync* |
| **Destination DB** | *Snowflake / SQL Server* |

**2 | Data Structure – Required Objects (mandatory)**

**Purpose:** show reviewers you will deliver the **minimum raw tables** the template expects. *Do* ***not*** *list every field here;*

| **Layer** | **Mandatory Tables / Files** | **Notes** |
| --- | --- | --- |
| **Transactional** | CaseHistory, Case | Key object tables |
| **Master Data** | Account, Contact, RecordType, User, UserRole, Profile | Needed for joins & dimension look-ups |
| **Milestones** | CaseMilestone, MilestoneType | Enables due-date & SLA analysis |

**File-naming convention (example):**

bash

Case\_raw.csv

CaseHistory\_raw.csv

...

*Note: All files delivered as UTF-8 CSV with comma delimiter.*

**3 | Setup Instructions (Recommended)**

**3.1 Source Connection – Salesforce**

1. **Connector:** CData Sync
2. **Auth Scheme:** Basic
3. **Credentials Required:**
   * **User** – Salesforce API user
   * **Password** – user password
   * **Security Token** – Salesforce token
   * **Login URL** – e.g. https://login.salesforce.com

**3.2 CData Sync Job**

| **Step** | **Setting** | **Value** |
| --- | --- | --- |
| **1** | Destination Schema | <target\_schema> |
| **2** | …. |  |
|  |

**3.3 Destination Database**

* **Snowflake** *or* **SQL Server** – choose one.
* Grant the CData target user CREATE TABLE, INSERT, UPDATE, DELETE on the destination schema.

**3.4 Transformations (dbt)**

* All \*\_raw tables are transformed via dbt models to the final Process Mining input format.

*Note: Indicate to users whether there are any specific models that they need to pay attention (e.g. hardcoded values etc)*

**4 | System Prerequisites (Recommended)**

| **Component** | **Minimum Requirement** |
| --- | --- |
| **Salesforce Profile** | Read-only access to objects in Section 2 |
| **CData Sync Version** | XX.X.X or later (earlier versions require query edits per provider note) |
|  |  |

**5 | User Guide (Recommended)**

*(Provide documentation covering specific navigation guidelines in cases there are metrics or fields that needs to be configured before publishing)*

**6 | Troubleshooting & Support (Recommended)**

| **Scenario** | **Root Cause** | **Resolution** |
| --- | --- | --- |
| **Authentication failure** | Invalid token or IP restriction | Reset Salesforce security token & whitelist CData IP |
| **Missing tables** | Profile lacks object access | Grant object-level read permission |
| ….. |  |  |

Support contact: **support@partner.com** – response within **4 business hours**.