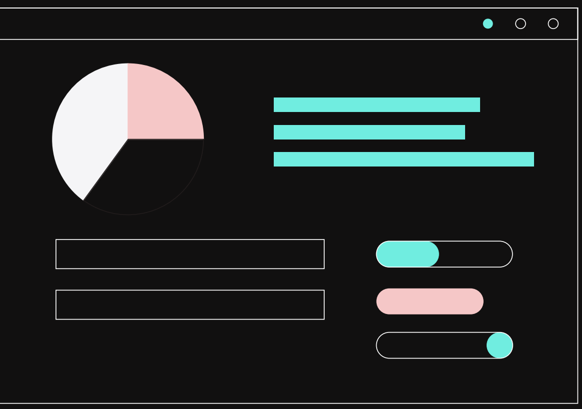


Recipe Requirements Worksheet

The questions below provide a framework for you to define your problem and how the recipe should be built to solve it. Ask yourself the following:

What business process/problem will this recipe solve?

Create a brief description of the recipe that provides an overview of the business process/problem it will solve.

Example

"Get new registrant data (email, first name, last name) from Eventbrite

- Create a new lead in Salesforce if the registrant information (email) has not been added as a lead in Salesforce
- Update the lead information (phone number) if the registrant information has been added as a lead in Salesforce.
- Post a message on the "marketing" Channel in Slack when a new registration happens"

Create a new lead | Update the lead information | Post the message

Do this

Describe your business problem and solution

What is the source of data for this recipe?

The source of data for your recipe could be a cloud app, on-premise app or database, files, SFTP/FTP servers, etc.

Example

Eventbrite, SalesForce, NetSuite etc.

Do this

List the app which will be the source of the data

When/How will this recipe execute?

You can choose to trigger the execution of the recipe based on events in your business app (e.g. new opportunity created, contact updated, etc.) or on a schedule using the native clock app.

Example

Automatically based on an event:

- When a new user registers for the event on Eventbrite

Scheduled:

- Run at 5 PM every day

Do this

Specify the frequency or event that will trigger the execution

How soon do you want this data synced/moved?

How time-sensitive is the business process to the availability of data? This will determine if you want to process near real-time data, poll for new data, or just fetch periodically.

Example

- As soon as it happens: e.g. alerting on payment failures in Stripe
- Every 5-10 mins e.g. adding or updating lead information in Marketo
- At the end of day/week/month e.g. moving files from one BOX storage account to another

Alert on payment failures

Add or update lead information

Move the files to Box

Do this

Define the time-sensitivity/urgency for the recipe to fetch and process data

What data do you want to process?

This is important to know for defining any filters and conditions that must be applied to the data that is fetched from the source.

Example

- New or updated data
- Only data that meets criteria e.g. tickets updated after July 19th, 3 PM
- Based on the output from a query
- Data in a file

Do this

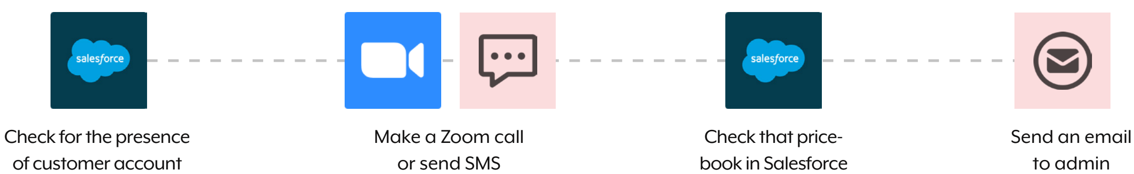
List the filters you would use to limit the data that needs to be processed by the recipe

What validation rules, data mappings, and business logic apply?

When taking actions (e.g. create invoice, log Zoom call, create a lead, etc.) in a business workflow or data syncing process, certain validation rules and/or business logic may be required.

Example

- Check for the presence of customer account in Salesforce when creating a case for a customer
- When a call from a high-value customer is missed, immediately make a Zoom call to connect the customer with the account manager; For non-high value customers, send SMS to the account manager with missed call transcript.
- Check that price-book in Salesforce has an entry for the Product id; Send an email to admin for missing product ids.



Do this

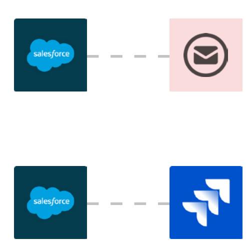
List conditions, validation rules, data mappings, business logic

What exceptions may occur and what do you want to do about it ?

List possible exceptions that could occur in your business process and how you want to act on them.

Example

- Missing Product Id in Pricebook: Check that price-book in Salesforce has an entry for the Product id; Send email to admin for missing product ids
- Missing Customer Account: Check for the presence of customer account in Salesforce when creating a case; create JIRA ticket for missing customer information.



Do this

List possible exceptions and errors you anticipate