## Specification revision and approval log

*Capture the info for those who will create, update, and approve this document.*

|  |  |  |
| --- | --- | --- |
| **Date** | **Action** | **Performed by** |
|  |  |  |
|  |  |  |

## Integration overview

*What’s the big picture for this integration and how it ties into other things you are doing?*

|  |  |
| --- | --- |
| **Name**  *What will you call the integration to distinguish it from other integrations?* |  |
| **Functional Summary**  *Very high level, what will this integration enable? Example: This integration will enable the two-way sync of order data from X to Y.* |  |
| **Needed Completion Date**  *When must this integration be in production to meet internal or external deadlines?* |  |
| **OKR or Roadmap Item**  *Is this integration tied to an OKR or roadmap item?* |  |

## Prerequisites

*Note: Everything in this section does not need to be completed before integration development, but it should at least be identified and tracked.*

### Changes to integration-related systems

*Does the target system need any new data elements or modifications to existing data elements to receive incoming data? What UI changes must be made to display this data? Are there any reports that need to be updated with this data?*

|  |  |  |
| --- | --- | --- |
| **Date** | **System** | **Change** |
|  |  |  |

### Access to sandboxes and API docs for integration-related systems

*If a sandbox isn’t available, is the system available in dev mode? If API docs are not immediately available, can they be generated from the API (often true with OpenAPI systems)?*

|  |  |
| --- | --- |
| **Name** | **Path** |
|  |  |
|  |  |

### Walkthrough of integration-related systems

*This should be done to ensure that integration development isn’t being done in a vacuum. The walkthrough should provide a snapshot of the current state, with discussion as to what will be different once the integration is in place.*

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| --- | --- | --- |
| **Date** | **System** | **Performed by** |
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### SMEs for integration-related systems

*These are your go-to people for initial info and digging deeper when questions arise.*

|  |  |  |  |
| --- | --- | --- | --- |
| **System** | **Company** | **Point of Contact** | **Role** |
|  |  |  |  |
|  |  |  |  |

## User stories

*What persona(s) are involved? What are they trying to achieve? What are the desired business benefits for your customers? You can go much deeper (into specific use cases), but user stories should cover at least the top level of detail for the integration.*

|  |  |
| --- | --- |
| **Primary User Story** |  |
| **User Story 0** |  |

## Functional requirements

|  |  |
| --- | --- |
| **Screen/Fields**  *Which screens/fields will be affected by the incoming data? Which screens/fields include the data that will be sent from your app to the target app?* |  |
| **Trigger**  *How is this integration triggered? Is it via a webhook, manually, time-based, etc.* |  |
| **Run Frequency**  *How frequently does the integration run?* |  |
| **Data Flow**  *From a high level perspective, how does the data flow? Example: “Order data is sent from X to the integration, within the integration A and B are combined into C; the order data is then transferred to Y where it updates the order table.” Attach a data flow diagram if that would be helpful.* |  |

## Technical requirements

### <Your App> connection

|  |  |
| --- | --- |
| **API/Datastore/Filesystem**  *What’s the connection point for accessing this end of the integration?* |  |
| **Authentication Method**  *What auth method is used?* |  |
| **Authentication Scope**  *Will there be a single set of credentials for a general/system user, or will individual users need to provide their own credentials?* |  |
| **Transport Language**  *What language does this system use for data (CSV, JSON, etc.)?* |  |
| **Transfer Protocol**  *What protocol does this system use for data (HTTP, HTTPS, etc.)?* |  |

### <System 1> connection

|  |  |
| --- | --- |
| **API/Datastore/Filesystem**  *What’s the connection point for accessing this end of the integration?* |  |
| **Authentication Method**  *What auth method is used?* |  |
| **Authentication Scope**  *Will there be a single set of credentials for a general/system user, or will individual users need to provide their own credentials?* |  |
| **Transport Language**  *What language does this system use for data (CSV, JSON, etc.)?* |  |
| **Transfer Protocol**  *What protocol does this system use for data (HTTP, HTTPS, etc.)?* |  |

### <Integration name>

|  |  |
| --- | --- |
| **Data Volume**  *How much data (on average) is transferred through the integration each time it runs?* |  |
| **Error Handling**  *How will you provide standard errors to end users? How will you handle unexpected errors?* |  |

#### Customer experience

|  |  |
| --- | --- |
| **Config Complexity**  *How complex should the configuration be? What are we attempting to achieve with the config?* |  |
| **Config Options**  *What options will be configurable by customers (auth, flows, data mapping, etc.)?* |  |
| **Deployment**  *Who will be doing the implementation (CS, customers, combination, etc.)?* |  |
| **Feature Gating**  *Will all flows/features be available to every customer, or is access restricted by a pricing plan or another criterion?* |  |

#### Data mapping

*For simple data mapping, this table may be sufficient. For large/complex maps, link to external files.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Source System** | **Source Field/File** | **Target System** | **Target Field/File** |
|  |  |  |  |

#### Other data modifications

*How will the data need to be transformed between source and target? Will certain fields be concatenated? Will other fields be split? Will units of measure need to be converted other units?*

|  |  |  |
| --- | --- | --- |
| **Source Field/File** | **Action Performed** | **Result** |
|  |  |  |