

Template for [Bold Group Product] with 3rd Party Software Integration

12/29/2023 4:33 pm EST

Part 1: Overview

What is this document about?

What does the integration do? (What is its business purpose?)

What can't it do?

Part 2: Requirements

[Bold Group Product] and Version

[3rd Party Product] and Version

Any License?

Database version

Part 3: Prerequisites

Is there anything to install?

Get [3rd Party Product] software from?

Install [Bold Group Product] version

Part 4: Setup

How to install and setup the [3rd Party Product] software?

Part 5: Common Settings in [3rd Party Product] software

Steps and screen shots (be specific, readers may not be familiar with [3rd Party Product] software)

Part 6: [Bold Group Product] and [3rd Party Product] Integration Setup

Steps and screen shots (be specific)

Part 7: Testing/Verifying the Integration

What to expect?

Where to see results? For example: -- Running a process populates data for X | -- Entering records in Y makes data available for Z

What data format can [3rd Party Product] software use? For example: Alphanumeric? Numeric? Length? Number of decimals? Date/Time format? (etc.)

What rights/roles in [Bold Group Product] can use the integration?

Part 8: Troubleshooting the Integration

If an error occurs, try this to resolve it: [add steps to resolve it]

If you don't see an expected result, look over there; that setting might be missing.

Part 9: Where to get help

I read this document; verified requirements; and followed the steps to set this up, but it just won't work. Who can help me?

Part 10: How to Reverse/Discontinue the Integration

Steps to end/back out of the integration.