Integration Troubleshooting Template

Use this template to share integration troubleshooting steps with your support organization. Learn more about this template below.

How do I troubleshoot if [Tool Name] integration is showing buggy behavior?

Have a user experiencing an issue when connecting to the [tool] integration? Here's what you need to know!

Confirm user followed correct set-up steps

1. Step #1*
2. Step #2*
3. Step #3*

*Add links to help center articles if applicable

Ask questions to further isolate the error

Have a user who correctly followed the process? Here are more questions!

1. View a screenshot of the set up.
2. What's the scope?
    1. Does the user have [tool] set up across their account?
    2. Is the issue isolated to a specific place or the whole account?
    3. Is the issue only impacting one user or multiple users?
3. What's the timeframe?
    1. Stopped working: Get timeframe for when it stopped working
    2. Intermittently working: Get timeframes for when the integration failed

4. View a screenshot of a [company] item that didn't notify in a channel.
5. Ask the user to delete and re-build the integration. After a test, does the issue persist?
6. Are there consistent trends? (Examples: Is there a specific time where the sync fails?)

Remove and reinstall the connection to a previous integration

1. Open your workplace app or connect on the web browser.
2. Find the [company] integration.
3. Scroll down to the bottom of the page and remove the integration
4. Reinstall the integration and try action again to see if this helped.

Insert Video Walkthrough (Optional)

Ticket examples

Examples from other customers who have experienced this same issue in the past

- Ticket Example #1 (Add context and link)
- Ticket Example #2 (Add context and link)
- Ticket Example #3 (Add context and link)

Followed the above steps and the error is persisting? Submit a bug report

Confirmed that the proper steps were taken? It's time to put together a report.

1. Process Step #1
2. Process Step #2
3. Process Step #3