Introduction

This document outlines the distinct responsibilities for DBsync Partners (Resellers) supporting either Cloud Workflow or Cloud Replication solutions. It defines partner involvement in pre-sales, setup, escalation procedures, and ongoing support for each product line.
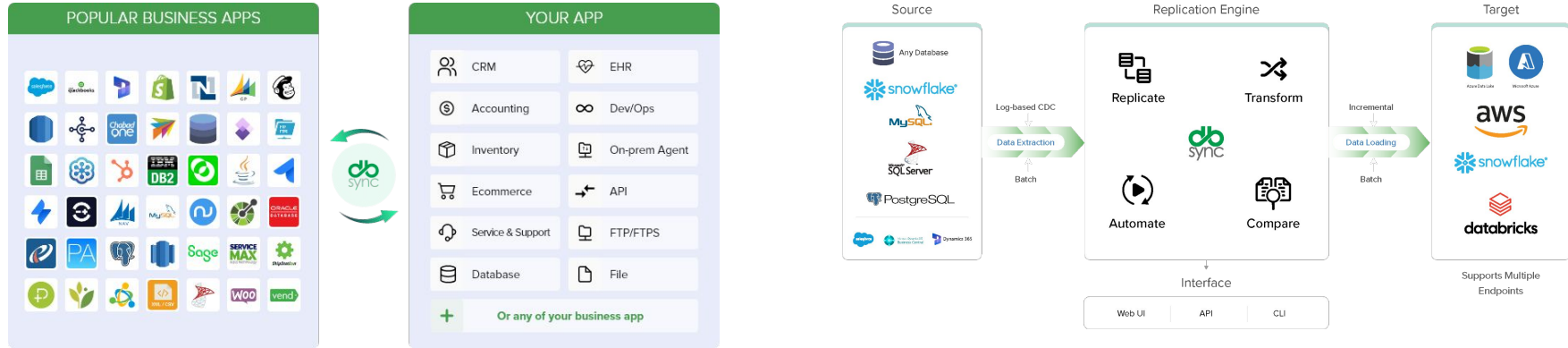
Cloud Workflow

1.1 Partner Responsibilities – Pre-Sales & Setup

- Understand workflow automation use cases and relevant supported apps (e.g., Salesforce, QuickBooks, NetSuite).
- Participate in discovery calls to identify integration automation opportunities.
- Demo standard workflows and explain common triggers/actions.
- Guide clients in using templates and the Setup Wizard for quick start.
- Assist in configuring basic workflows and schedules.

1.2 Handoff to Technical Team (Advanced Troubleshooting)

- Custom workflow requirements beyond template capabilities.
- API error responses or webhook failures.
- Timeouts or performance issues during heavy sync operations.
- Integration of non-standard platforms or custom connectors.
- Connector Setup and Validation issues

Cloud Workflow

1.3 Ongoing Customer Support Responsibilities

- Support users with modifying or duplicating existing workflows.

- Monitor daily workflow execution logs and flag issues.

- Train users on workflow editing, trigger management, and log analysis.

- Escalate recurring or complex issues to Technical Support.

Cloud Replication

2.1 Partner Responsibilities – Pre-Sales & Setup

- Understand client data warehousing and reporting needs (e.g., Snowflake, Redshift, BigQuery).
- Identify systems from which replication is needed (e.g., Salesforce, Dynamics, NetSuite).
- Demo standard data extraction and replication flows.
- Assist with initial authentication, connector setup, and scheduling.
- Ensure data models are aligned with reporting needs.

2.2 Handoff to Technical Team (Advanced Troubleshooting)

- License issues
- Login issues
- Complex schema mapping or transformation prior to replication.
- Performance degradation or data duplication errors.
- Custom replication intervals or scripting logic.
- Index out of bounds exception when writing data to table
- Out of memory exception with application
- CDC stopped working because of Database setup

Cloud Replication

2.3 Ongoing Customer Support Responsibilities

- Ensure replication jobs are scheduled and executed correctly.
- Monitor logs for error codes or incomplete syncs.
- Coordinate with DBsync engineers for performance tuning or large-volume handling.

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