



Processity Quickstart Guide

Package version 0.9X

Introduction

Welcome to **Processity**, a powerful process mining solution designed specifically for Salesforce. Processity will help you to better understand your business processes as they are actually executed by your end users in Salesforce.

What is Process Mining?

Process mining is a data-driven approach that helps organizations analyze their business processes based on event logs. By visualizing workflows, identifying bottlenecks, and uncovering inefficiencies, process mining enables better decision-making and optimization of operations.

What is Processity?

Processity performs process mining on a limited amount of your organization's records that are relevant to a business process, allowing you to gain insights with minimal effort. This lightweight solution provides a quick and easy way to explore your business processes without requiring extensive data preparation or technical expertise.

This guide will walk you through the installation, configuration, and basic usage of Processity.

Prerequisites

Before getting started, ensure you meet the following requirements:

- A Salesforce account with API access.
 - Administrator privileges to install and configure Processity.
 - A supported web browser (Chrome, Edge, or Firefox recommended).
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Installation

Step 1: Install Processity

1. Log in to your Salesforce account.
2. Navigate to the **AppExchange** and search for **Processity**.
3. Click **Get It Now** and follow the prompts to install the package in your desired Salesforce environment (Production or Sandbox).

Step 2: Assign Permissions

1. Go to **Setup > Permission Sets**.

2. Find the '**Processity Lite User**' Permission Set and assign it to relevant users.

Step 3: Configure External Credentials

Processity uses a Microsoft Azure Function App to do its process mining computation. This app has no storage capability - it returns process mining results immediately without storing any of your data.

The credentials for connecting to Azure are included in the package installation. You may just need to finalise setting them up.

If your user has the right permissions to do so, the credentials are set up the first time you perform a 'Quick Explore' or use a standard process template (see below).

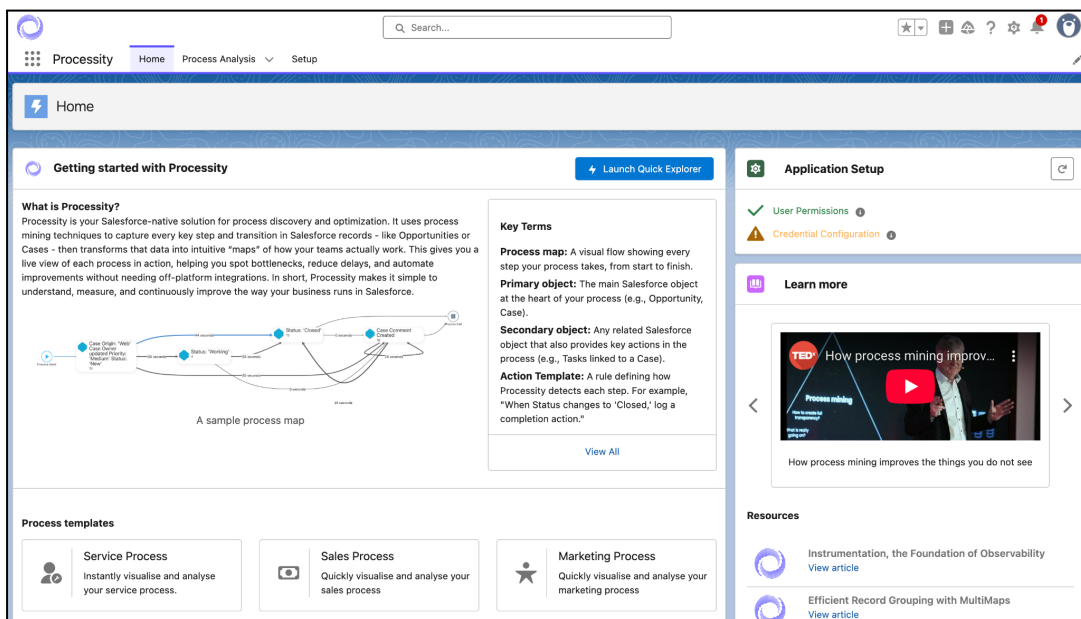
You might receive an error message informing you that your Salesforce administrator will need to help. If this happens, the administrator should take the following steps.

1. Open the '**Processity**' app from the Salesforce App Launcher.
2. Navigate to the '**Setup**' tab
3. Press the button 'Setup Processity Credential'

Walkthrough - Process Templates

Process Templates are a pre-defined quick exploration of your data, focused on core Salesforce objects such as Case, Opportunity, and Lead, allowing you to very quickly get started with Processity to explore your processes.

1. Open the 'Processity' app from Salesforce's App Launcher



2. Click 'Service Process'

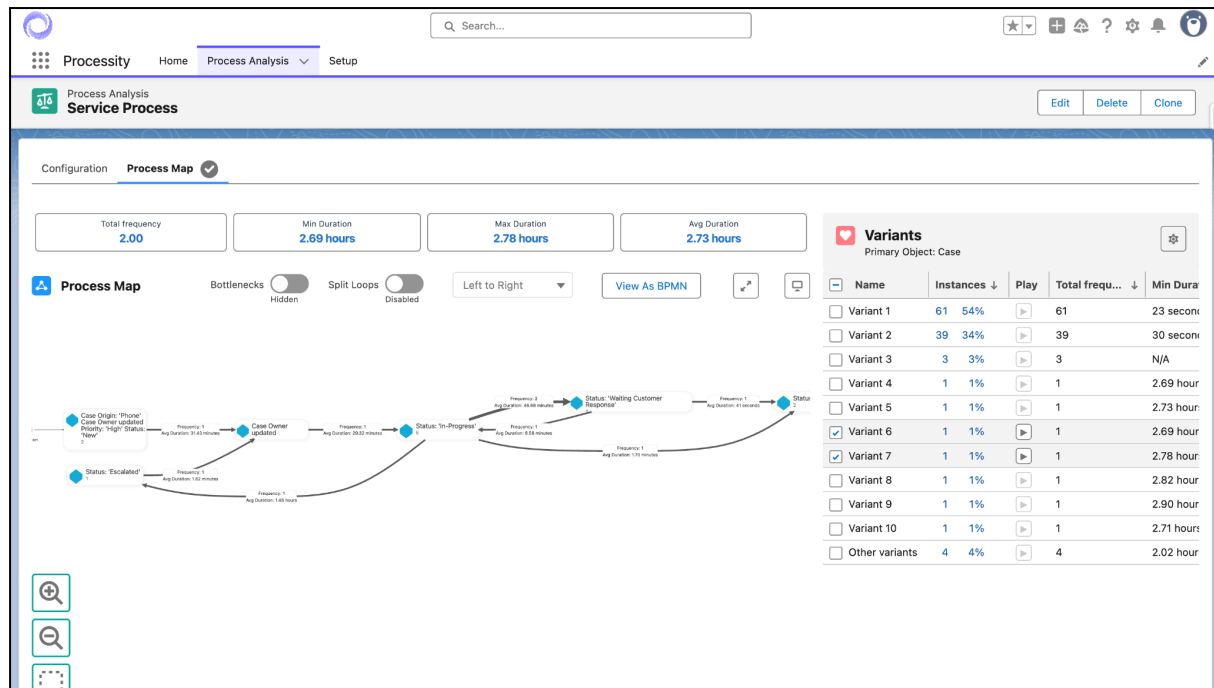
This will start a quick analysis of service (Case) data. (You can also click 'Sales Process' or 'Marketing Process' if you have Opportunity or Lead data, respectively, that you'd like to analyze).

The screenshot displays the Processity application's home dashboard. At the top, there's a navigation bar with 'Processity', 'Home', 'Process Analysis', and 'Setup'. A search bar is also present. The main content area is divided into several sections:

- Getting started with Processity:** Includes a 'Launch Quick Explorer' button and a 'What is Processity?' section explaining its purpose in Salesforce process discovery. It features a 'A sample process map' diagram showing a flow from 'Open Case' to 'Status: Closed'.
- Key Terms:** Defines 'Process map', 'Primary object', 'Secondary object', and 'Action Template'.
- Application Setup:** Shows 'User Permissions' and 'Credential Configuration' status.
- Learn more:** Contains a video player titled 'How process mining improv...'.
- Process templates:** Offers three options: 'Service Process' (highlighted with a red circle), 'Sales Process', and 'Marketing Process', each with a brief description.
- Resources:** Lists articles like 'Instrumentation, the Foundation of Observability' and 'Efficient Record Grouping with MultiMaps'.

3. Your Process visual

This is the visual representation of some of the variants in your



4. 'Variants' represent the different paths through your business process

As you select or deselect variants, the Process visual will update to show you the visual process representation of the selected variants.

5. Inspect a variant's underlying field history

To view the underlying field history for records within a variant - the data that Processity uses to create the Process visual - click on the value in the 'Instances' column of the variant table, for the desired row.

Variants					
Primary Object: Case					
Name	Instances	Play	Total frequ...	Min Dura	
Variant 1	61 54%	▶	61	23 seconds	
Variant 2	39 34%	▶	39	30 seconds	
Variant 3	3 3%	▶	3	N/A	
Variant 4	1 1%	▶	1	2.69 hours	
Variant 5	1 1%	▶	1	2.73 hours	
Variant 6	1 1%	▶	1	2.69 hours	
Variant 7	1 1%	▶	1	2.78 hours	
Variant 8	1 1%	▶	1	2.82 hours	
Variant 9	1 1%	▶	1	2.90 hours	
Variant 10	1 1%	▶	1	2.71 hours	
Other variants	4 4%	▶	4	2.02 hours	

6. Record Histories

You can select different record instances and view the underlying field tracking data

Instances of Other variants (4)

Records List

00001110

00001111

00001112

00001113

Showing record history for  00001111

Object	Source	Field	Date	Old Value	New Value	Actor
Case		created	08 Apr 2025, 12...			 System Admin
Case		Owner ID	08 Apr 2025, 12:...	005QH000003L...	005QH000004p...	 System Admin
Case		Status	08 Apr 2025, 13...	New	In-Progress	 T1 Support Ag
Case		Status	08 Apr 2025, 14...	In-Progress	Escalated	 T1 Support Ag
Case		Owner ID	08 Apr 2025, 14...	005QH000004p...	005QH000004p...	 T1 Support Ag
Case		Status	08 Apr 2025, 14...	Escalated	Waiting Custom...	 T2 Support Ag
Case		Status	08 Apr 2025, 14...	Waiting Custom...	In-Progress	 T2 Support Ag
Case		Status	08 Apr 2025, 14...	In-Progress	Waiting Custom...	 T2 Support Ag
Case		Status	08 Apr 2025, 15...	Waiting Custom...	Closed	 System Admin

Close

7. Click 'Close' to exit the record history

Instances of Other variants (4)

Records List

00001110

00001111

00001112

00001113

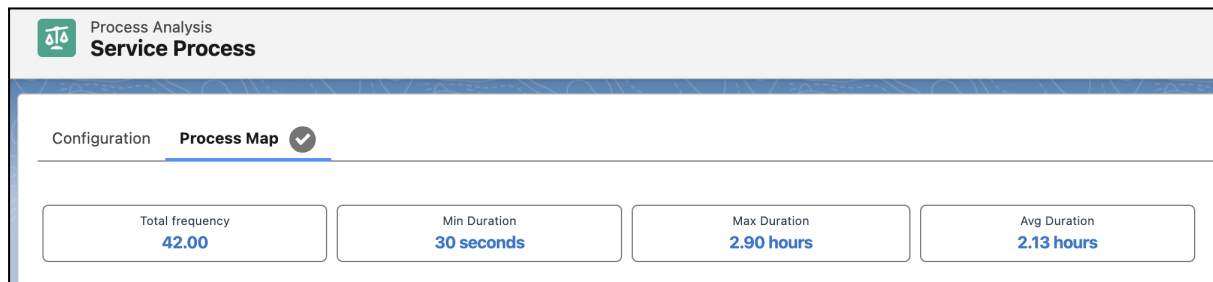
Showing record history for  00001111

Object	Source	Field	Date	Old Value	New Value	Actor
Case		created	08 Apr 2025, 12...			 System Admin
Case		Owner ID	08 Apr 2025, 12:...	005QH000003L...	005QH000004p...	 System Admin
Case		Status	08 Apr 2025, 13...	New	In-Progress	 T1 Support Ag
Case		Status	08 Apr 2025, 14...	In-Progress	Escalated	 T1 Support Ag
Case		Owner ID	08 Apr 2025, 14...	005QH000004p...	005QH000004p...	 T1 Support Ag
Case		Status	08 Apr 2025, 14...	Escalated	Waiting Custom...	 T2 Support Ag
Case		Status	08 Apr 2025, 14...	Waiting Custom...	In-Progress	 T2 Support Ag
Case		Status	08 Apr 2025, 14...	In-Progress	Waiting Custom...	 T2 Support Ag
Case		Status	08 Apr 2025, 15...	Waiting Custom...	Closed	 System Admin

Close

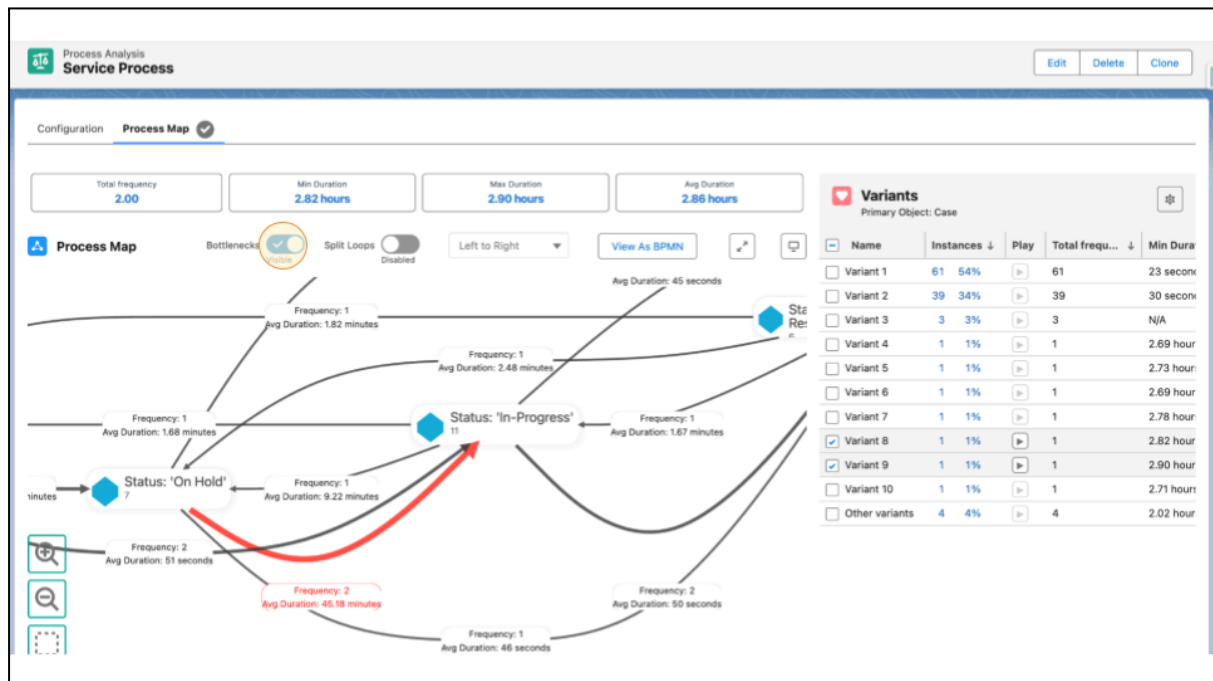
8. View the selected variants' key metrics

You can see the key metrics of your selected variants, including frequency (the number of records in the selected variants), and process duration minimum, maximum, and average.

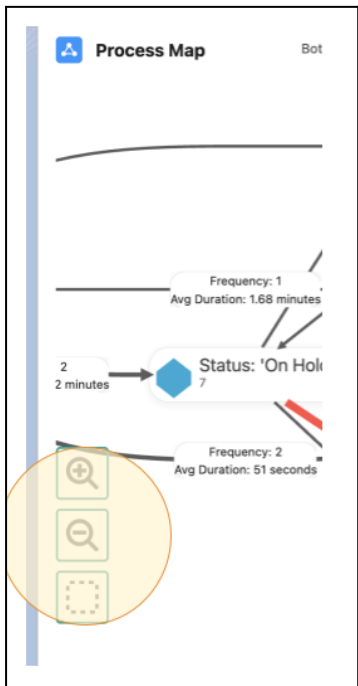


9. Highlight process bottlenecks

The slowest parts of your business process can be the most interesting to investigate, you can quickly highlight these bottlenecks using the 'Bottlenecks' toggle.



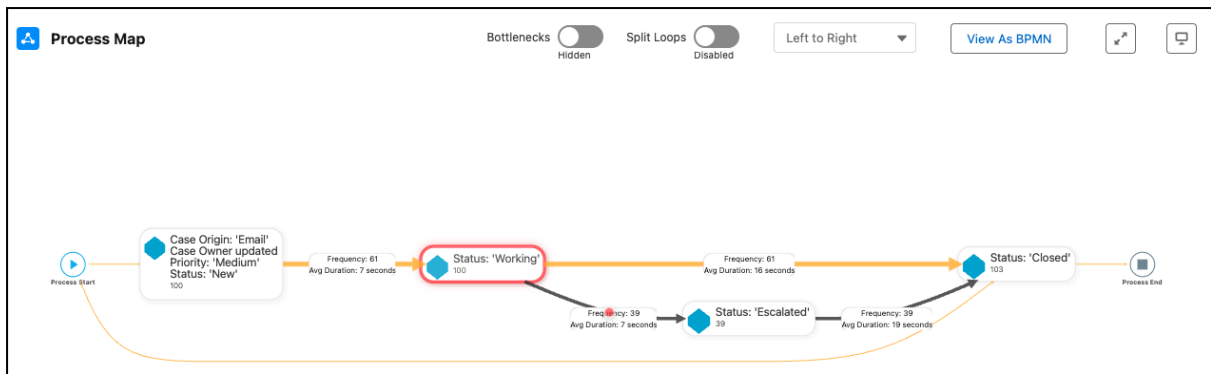
10. You can zoom in/out and center the visualization using the visualization controls



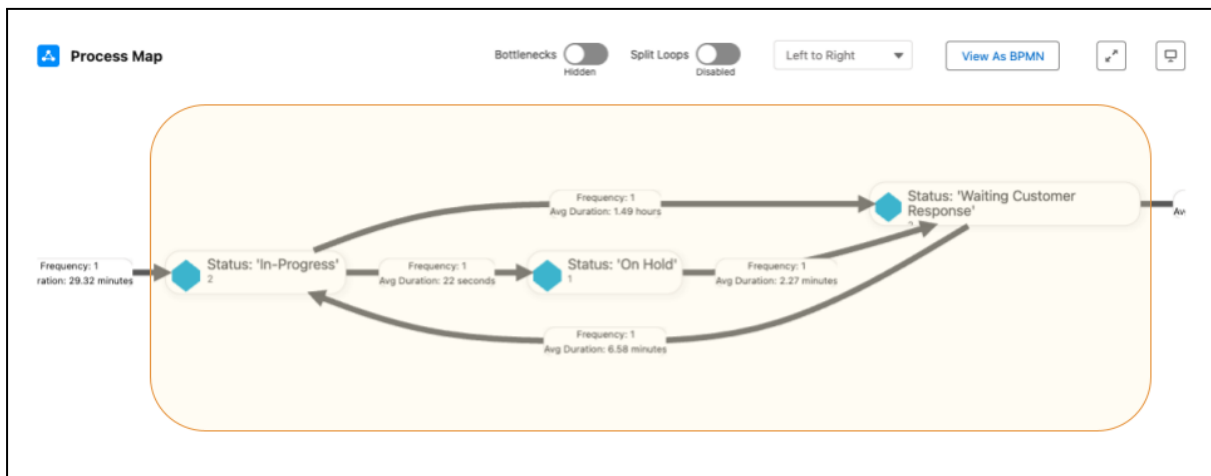
11. You can visibly see the path within a visualisation that a variant takes by using the 'variant playback' feature. Click the 'play' button for any selected variant.

Variants					
Primary Object: Case					
☐	Name	Instances ↓	Play	Total frequ... ↓	Min Dura
☐	Variant 1	61 54%	▶	61	23 secon
☐	Variant 2	39 34%	▶	39	30 secon
☐	Variant 3	3 3%	▶	3	N/A
☐	Variant 4	1 1%	▶	1	2.69 hour
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☒	Variant 7	1 1%	▶	1	2.78 hour
☐	Variant 8	1 1%	▶	1	2.82 hour
☐	Variant 9	1 1%	▶	1	2.90 hour
☐	Variant 10	1 1%	▶	1	2.71 hours
☐	Other variants	4 4%	▶	4	2.02 hour

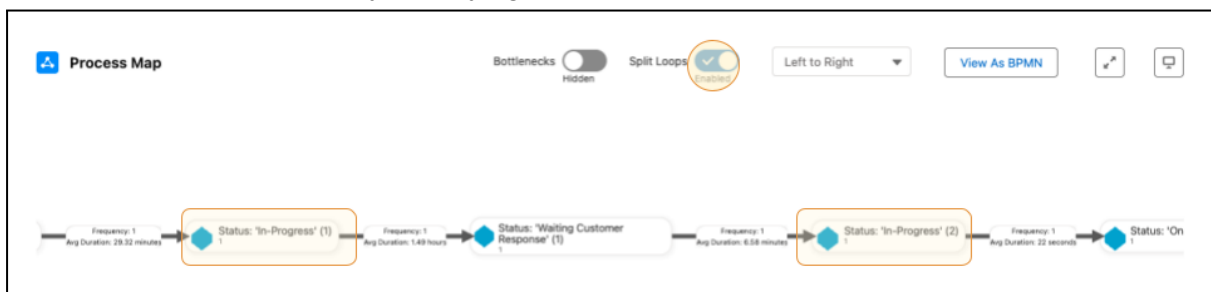
12. The 'variant playback' will then show you with a process token the path this variant takes through the process visual. This can be very helpful in understanding the linear path a variant takes, especially if the variant involves loops of steps.



13. For variants with loops - where the process repeatedly visits the same step - it can be hard to discern the linear progression of a variant within the process visual.

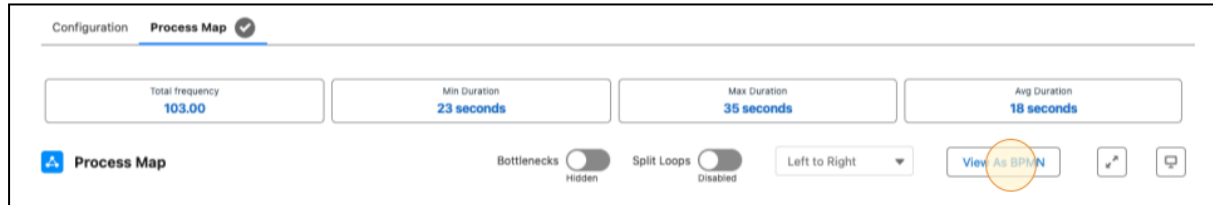


14. You can split these loops to display each visit to a step as a unique step, helping you understand complex loops by displaying a linear view of the process.

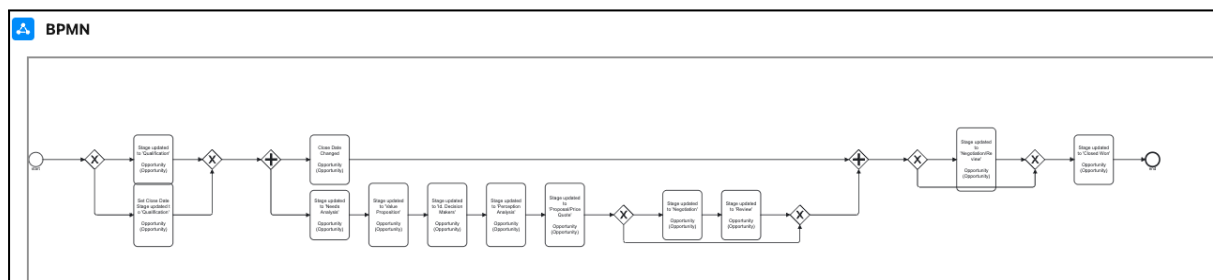


15. View process variants as a BPMN diagram

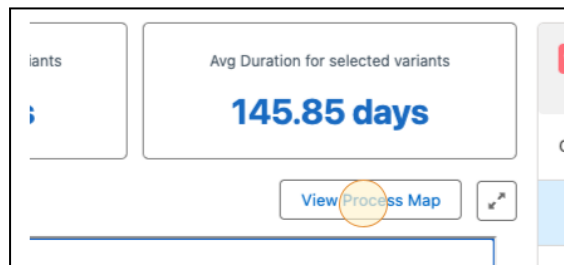
You can view the selected process variants as a BPMN diagram, a format widely used by Process Analysts



16. View the BPMN diagram of your selected process variants



17. Return to the process visual by clicking 'View Process Map'

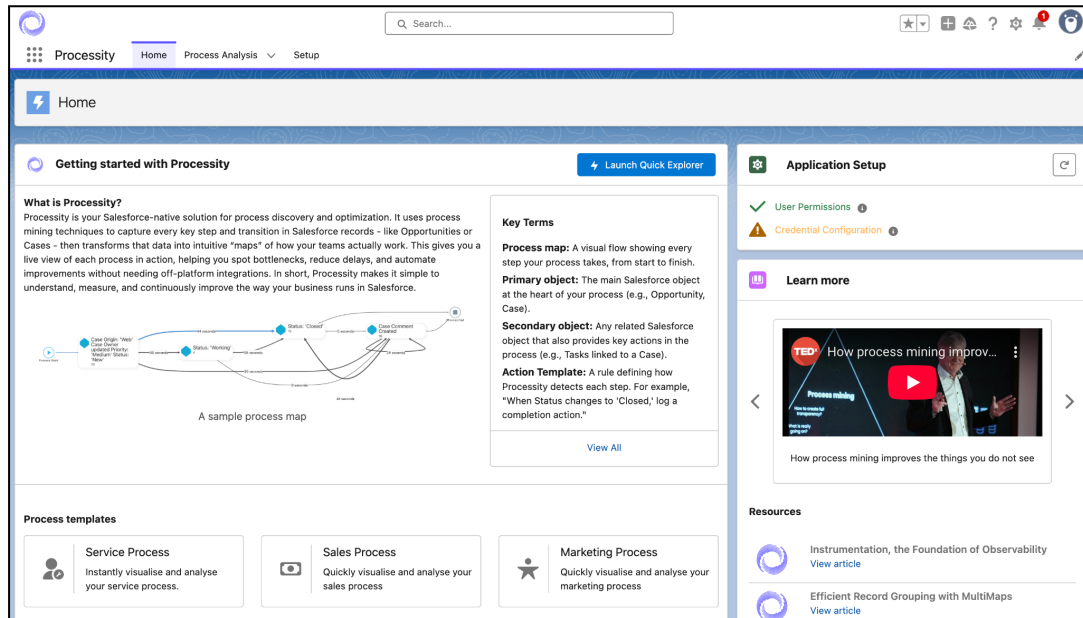


18. For configuration options of your process analysis, see the 'Walkthrough - Quick Explorer' section.

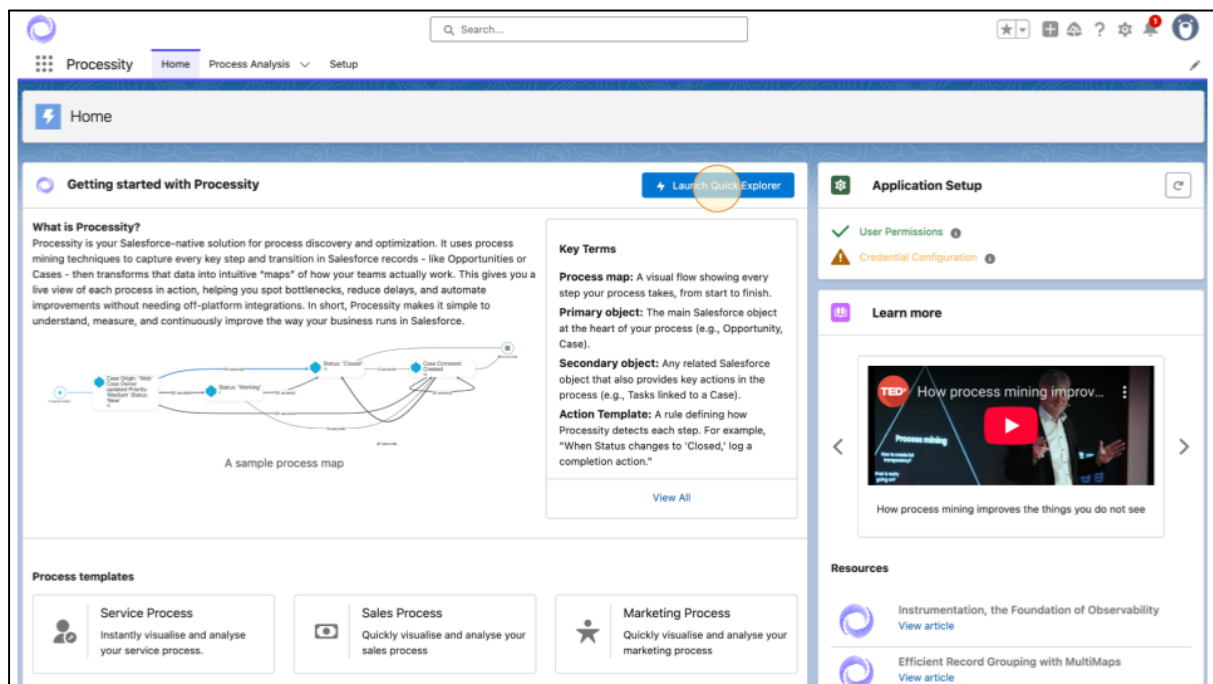
Walkthrough - Quick Explorer

You can quickly create tailored process analyses using the Processity Quick Explorer - a step-by-step wizard to get you quickly to process insights.

1. Open the 'Processity' app from Salesforce's App Launcher



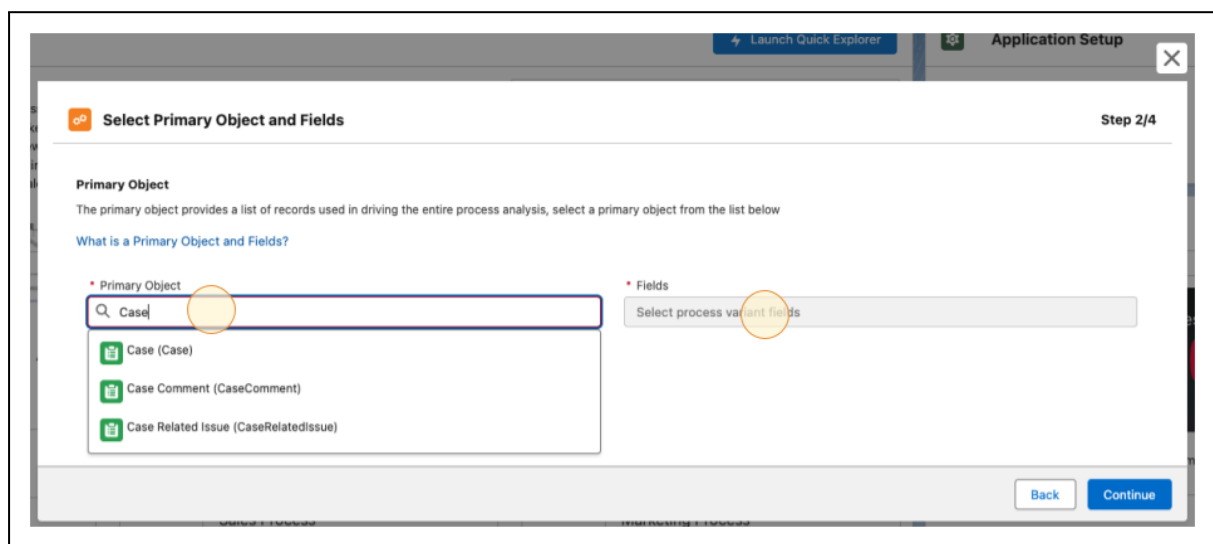
2. Click 'Launch Quick Explorer'



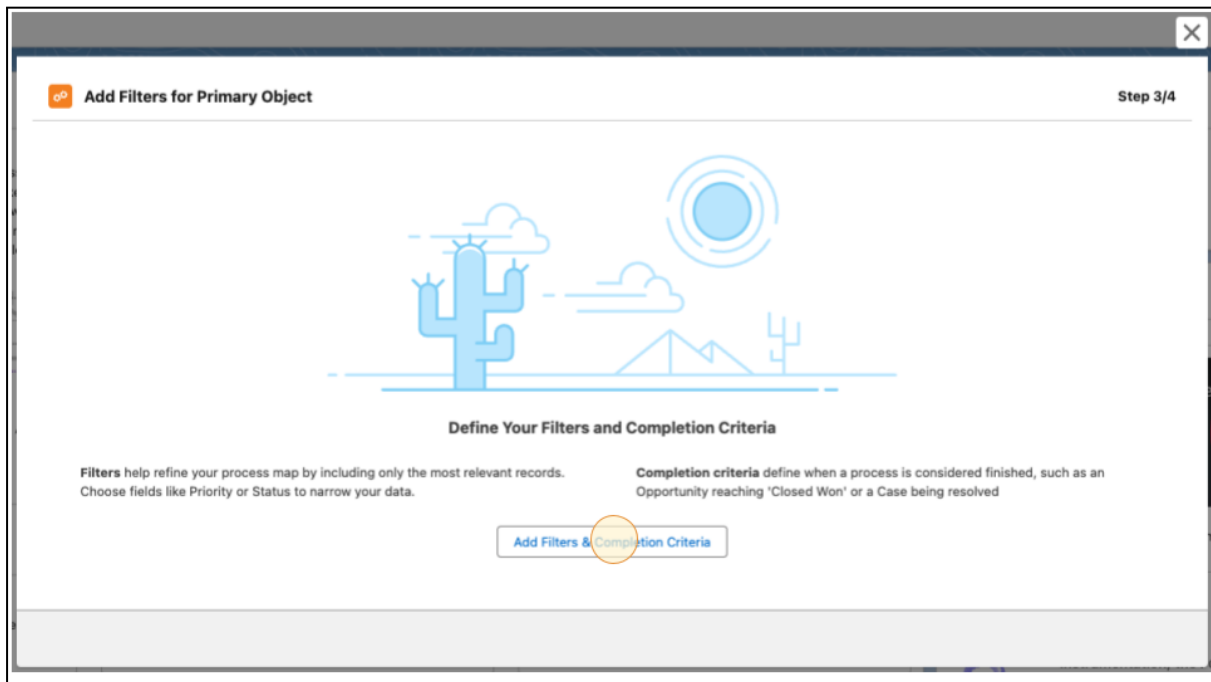
3. 'Quick Explorer' lets you analyse any of your Salesforce data, starting with picking a 'Primary Object', which should be at the core of your business process. For example, Support processes are typically centred around the 'Case' object.



4. Select the 'Primary Object' input and choose your primary object. Then select the relevant fields for your process - fields determine what data is included in your analysis. Select key fields to gain meaningful insights into your process.



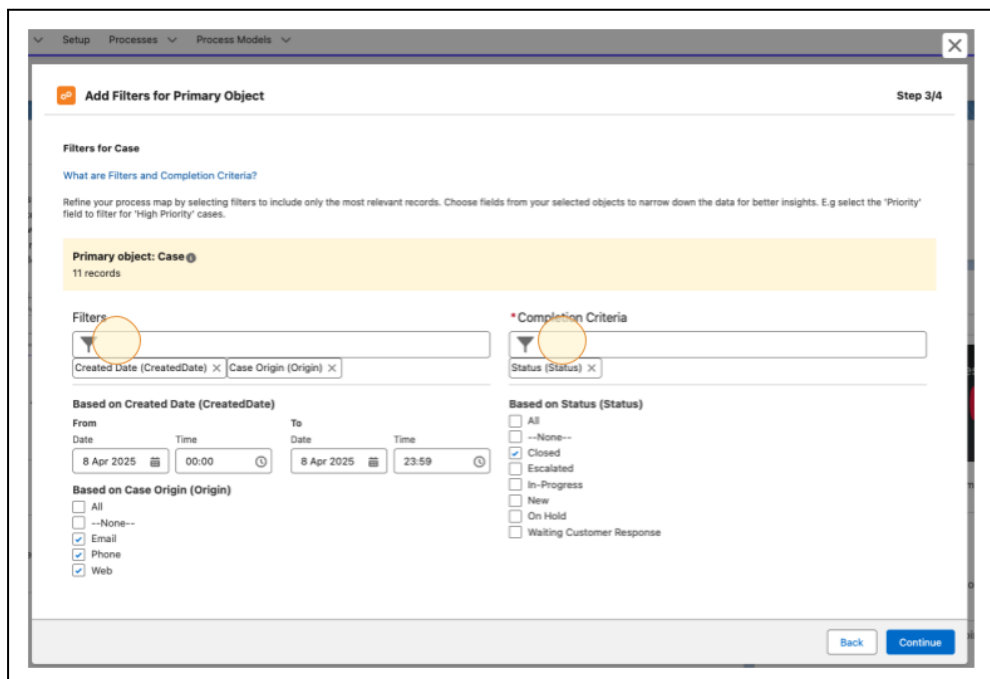
5. Next, select the filters that refine which subset of the primary object you are interested in analyzing.



6. Configure your filters

'Filters' allow you to specify the specific subset of primary records you want to analyze - for example, 'Creation Date', 'Case Origin' would be filters allowing you to analyze cases with specific origins, created at a certain point or in a certain range of dates.

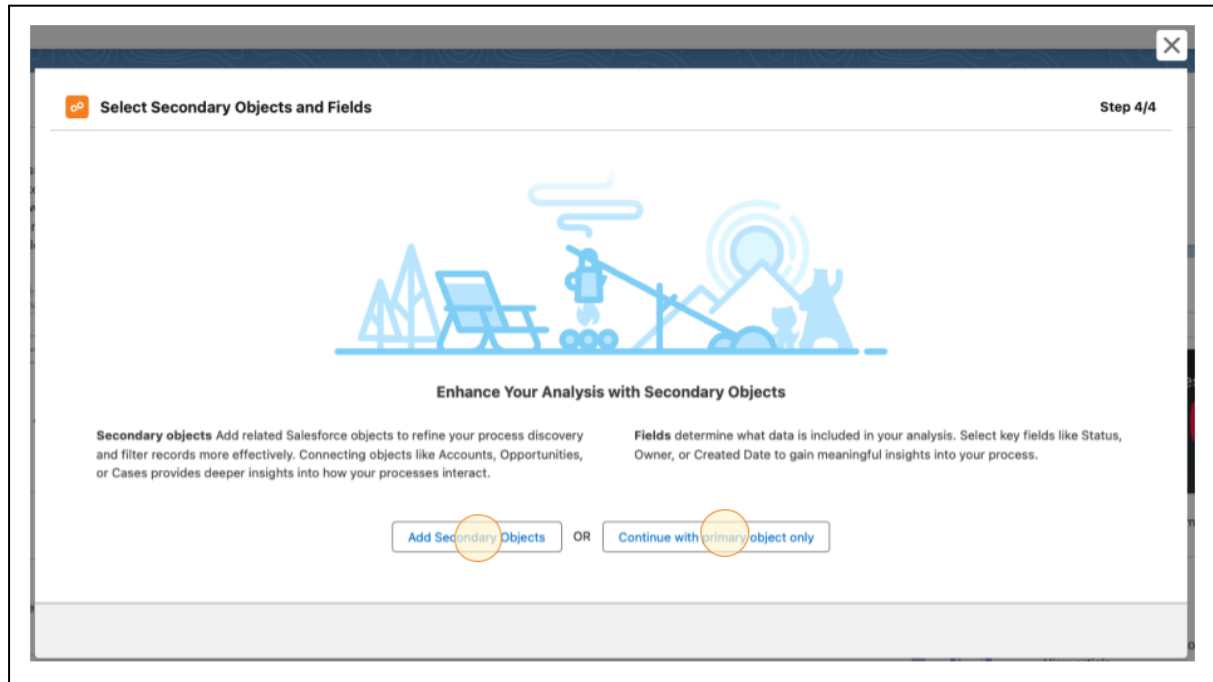
'Completion Criteria' specifies when your business process has completed, so that in-flight records are excluded from the analysis.



7. Select 'Secondary Objects' and fields

Your business process may be centred on a primary object, but often other related Salesforce objects are required to get a full picture of the process. For example, cases with parent or child cases, or cases related to a custom object.

Click 'Add Secondary Objects' to configure a 'Secondary object' or click 'Continue with primary object only' to skip this step.



8. Configure a 'Secondary Object'

To configure your secondary objects, search for the object via its relationship to the primary object. Once selected, you can select the useful fields for your process analysis (these are the fields that when modified, become steps on your process visual). Finally, set any filters that a secondary object must meet to be considered in your analysis. This is useful where you have a primary object that might have a relationship with multiple records of the

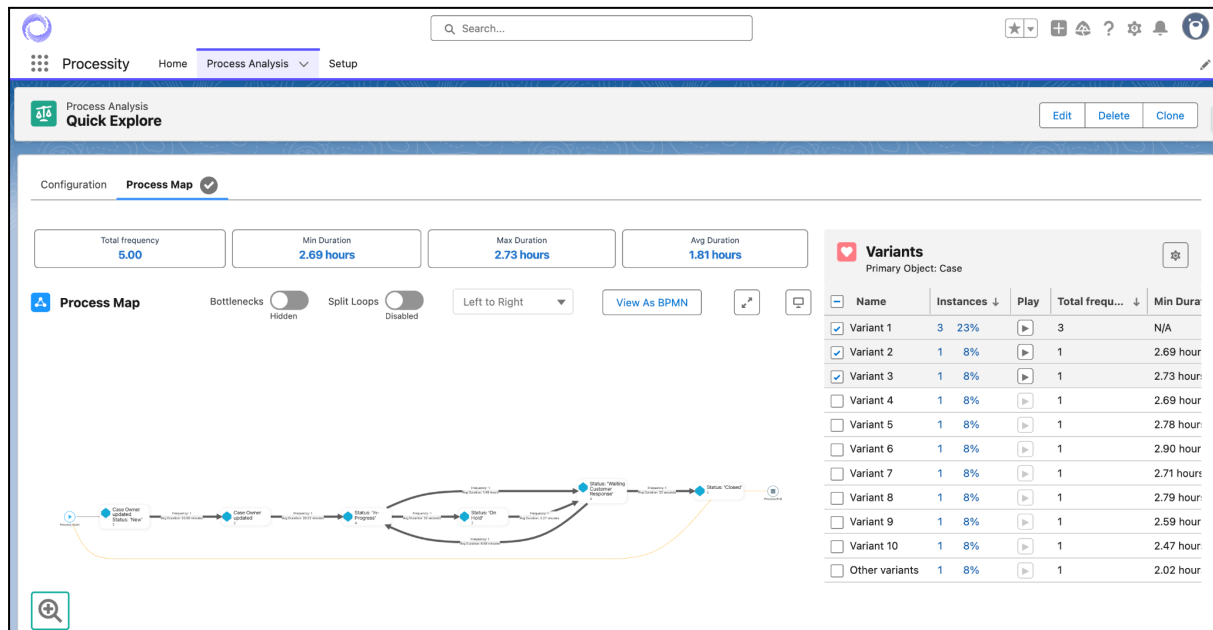
secondary object's type, but only a subset of these records are of interest to your analysis.

9. Repeat for further 'Secondary Objects'

You can repeat these steps if you have further secondary objects to include in your analysis.

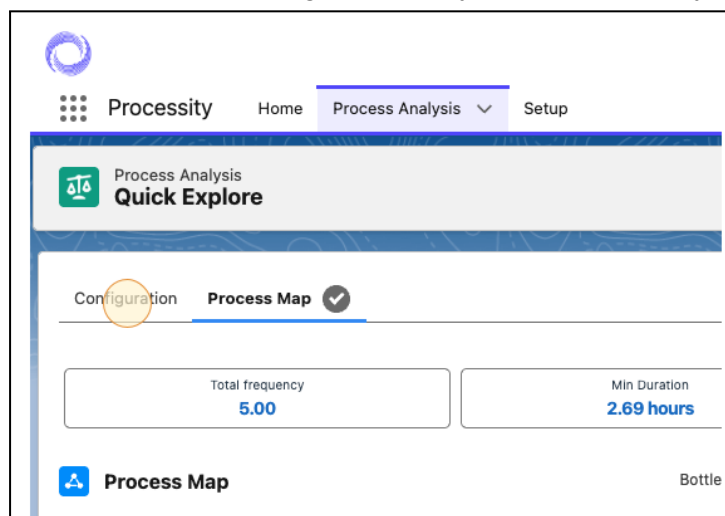
10. Next, click 'Submit' to run the analysis

11. You'll then be taken to your Process visual for your configured objects and filters

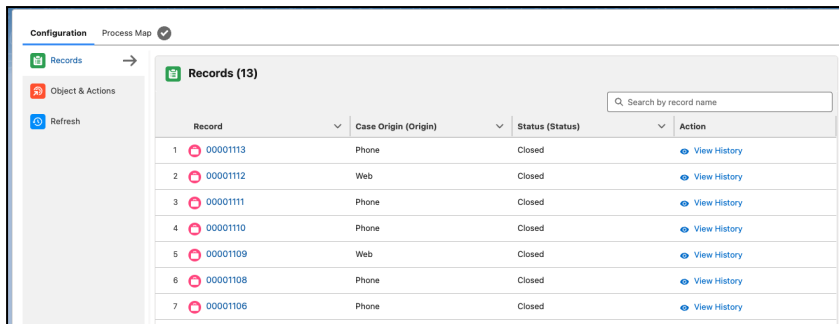


12. For navigation, controls, and exploration of the Process visual, see the 'Walkthrough - Process Templates' section.

13. To access the configuration for your Process analysis, click the 'Configuration' sub-tab.

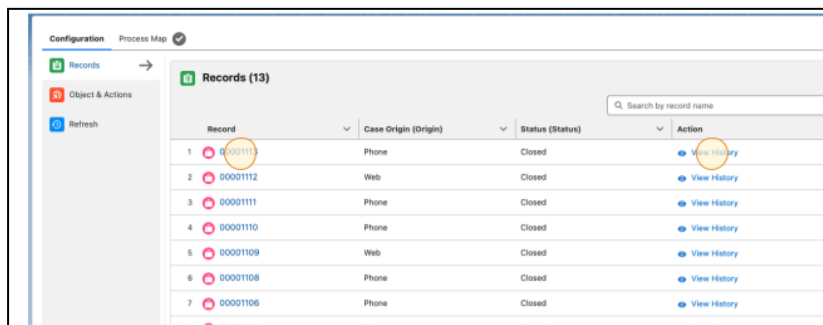


14. The 'Records' tab of the configuration screen displays all the records of the primary object that meet your filter criteria.



Record	Case Origin (Origin)	Status (Status)	Action
1 00001113	Phone	Closed	View History
2 00001112	Web	Closed	View History
3 00001111	Phone	Closed	View History
4 00001110	Phone	Closed	View History
5 00001109	Web	Closed	View History
6 00001108	Phone	Closed	View History
7 00001106	Phone	Closed	View History

15. You can click the record name to navigate to that record, or click 'View History' to see the underlying record history that Processity is using.



Record	Case Origin (Origin)	Status (Status)	Action
1 00001113	Phone	Closed	View History
2 00001112	Web	Closed	View History
3 00001111	Phone	Closed	View History
4 00001110	Phone	Closed	View History
5 00001109	Web	Closed	View History
6 00001108	Phone	Closed	View History
7 00001106	Phone	Closed	View History

16. On the right-hand side of the configuration you can re-configure the analysis filters by amending, deleting, or adding new filters. Be sure to apply your changes by clicking on the 'Apply Filter' button.

 **Filters**

Refine your process map by selecting filters to include only the most relevant records. Choose fields from your selected objects to narrow down the data for better insights. E.g select the 'Priority' field to filter for 'High Priority' cases.

Primary object: Case
Showing 13 of 13 records that match your filter criteria

Choose Fields for Filtering

 Select fields

Case Origin (Origin) × Status (Status) ×

Based on Case Origin (Origin)

- ☐ All
- ☐ --None--
- ☐ Email
- ☒ Phone
- ☐ ...

Apply Filter

17. As you adjust your filters, the number of records being included in the analysis is displayed. In large data volume scenarios, only a subset of the in-scope data will be analyzed.


Filters

Refine your process map by selecting filters to include only the most relevant records. Choose fields from your selected objects to narrow down the data for better insights. E.g select the 'Priority' field to filter for 'High Priority' cases.

Primary object: Case

Showing 13 of 13 records that match your filter criteria

18. You can search for records within the in-scope records for your analysis


Process Analysis
Quick Explore

Configuration

Process Map

Records

Object & Actions

Refresh

Records (13)

Search by record name

Record	Case Origin (Origin)	Status (Status)	Action
1 00001113	Phone	Closed	View History
2 00001112	Web	Closed	View History
3 00001111	Phone	Closed	View History
4 00001110	Phone	Closed	View History
5 00001109	Web	Closed	View History

19. Further details of your analysis are available in the 'Objects & Actions' sub-tab



Processity
Home
Process Analysis
Setup

Search...









Process Analysis
Quick Explore

Configuration

Process Map

Records

Object & Actions

Refresh

Actions (114)

Search by record name

Record	Object Name	Activity	Time
1 00001001	Case	Status: 'Closed'	10 Jan 2025, 16:40:18
2 00001002	Case	Status: 'Closed'	10 Jan 2025, 16:40:18
3 00001000	Case	Status: 'Closed'	10 Jan 2025, 16:40:18
4 00001103	Case	Case Owner updated	08 Apr 2025, 12:12:29
5 00001103	Case	Status: 'New'	08 Apr 2025, 12:12:29
6 00001104	Case	Case Owner updated	08 Apr 2025, 12:13:39

Primary Object & Fields (3)

Primary Object
Case

Fields
Select process variant fields
Case Owner (Ownerid) X Type (Type) X Status (Status) X

20. The 'Actions' section displays all the detected actions on your in-scope records - these actions become the steps in the process visual, and include the record the action was detected on, the object type, the activity detected, and the date the action was performed.

The screenshot displays the Processity Quick Explore interface. The top navigation bar includes 'Processity', 'Home', 'Process Analysis', and 'Setup'. A search bar is located at the top right. The left sidebar contains 'Records', 'Object & Actions', and 'Refresh'. The main content area is titled 'Actions (114)' and features a table with columns: Record, Object Name, Activity, and Time. The table lists 16 records, each with a unique ID, object name 'Case', and activity status (e.g., 'Status: Closed', 'Case Owner updated'). A search bar within the table is labeled 'Search by record name'. To the right of the table, there are sections for 'Primary Object & Fields (3)' and 'Secondary Object & Fields (0)'. The 'Primary Object & Fields' section shows 'Case' as the primary object and lists fields: 'Case Owner (Ownerid)', 'Type (Type)', and 'Status (Status)'. The 'Secondary Object & Fields' section is currently empty.

Record	Object Name	Activity	Time
1	00001001	Case	Status: 'Closed'
2	00001002	Case	Status: 'Closed'
3	00001000	Case	Status: 'Closed'
4	00001103	Case	Case Owner updated
5	00001103	Case	Status: 'New'
6	00001104	Case	Case Owner updated
7	00001104	Case	Status: 'New'
8	00001105	Case	Case Owner updated
9	00001105	Case	Status: 'New'
10	00001106	Case	Case Owner updated
11	00001106	Case	Status: 'New'
12	00001108	Case	Case Owner updated
13	00001108	Case	Status: 'New'
14	00001109	Case	Case Owner updated
15	00001109	Case	Status: 'New'
16	00001110	Case	Case Owner updated

21. You can also search for specific records within the action list

This screenshot is similar to the one above, but it highlights the search bar within the 'Actions (114)' table. The search bar is labeled 'Search by record name' and is circled in orange. The table shows the first four records, which are all 'Case' objects with statuses 'Closed' or 'Case Owner updated'.

Record	Object Name	Activity	Time
1	00001001	Case	Status: 'Closed'
2	00001002	Case	Status: 'Closed'
3	00001000	Case	Status: 'Closed'
4	00001103	Case	Case Owner updated

22. The objects panel on the right-hand side of this sub-tab allow you

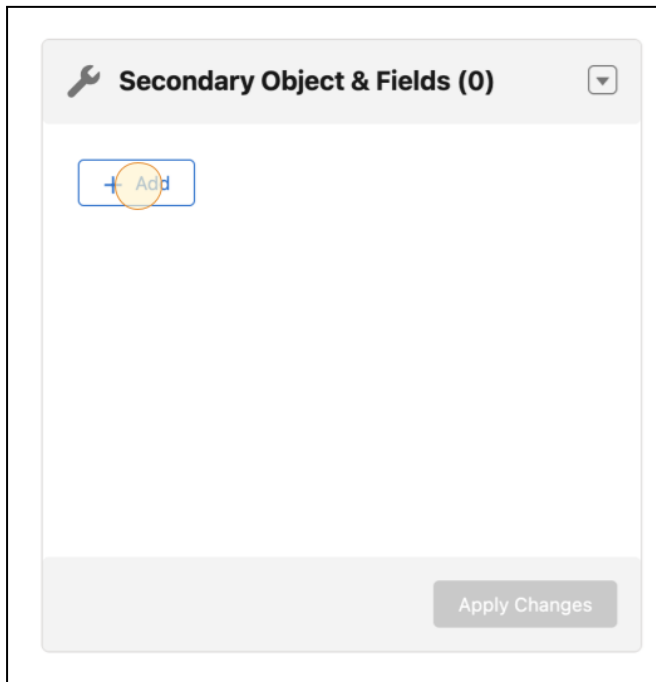
The screenshot shows the 'Process Analysis Quick Explore' interface. The main panel displays a table of 'Actions (114)' with columns: Record, Object Name, Activity, and Time. The table lists 17 records for 'Case' objects, showing various activities like 'Status: Closed', 'Case Owner updated', and 'Status: New' with corresponding timestamps.

On the right, the 'Primary Object & Fields (3)' panel is visible. It shows the 'Primary Object' as 'Case' and lists three selected fields: 'Case Owner (Ownerid)', 'Type (Type)', and 'Status (Status)'. Below this, the 'Secondary Object & Fields (0)' panel is shown with an '+ Add' button.

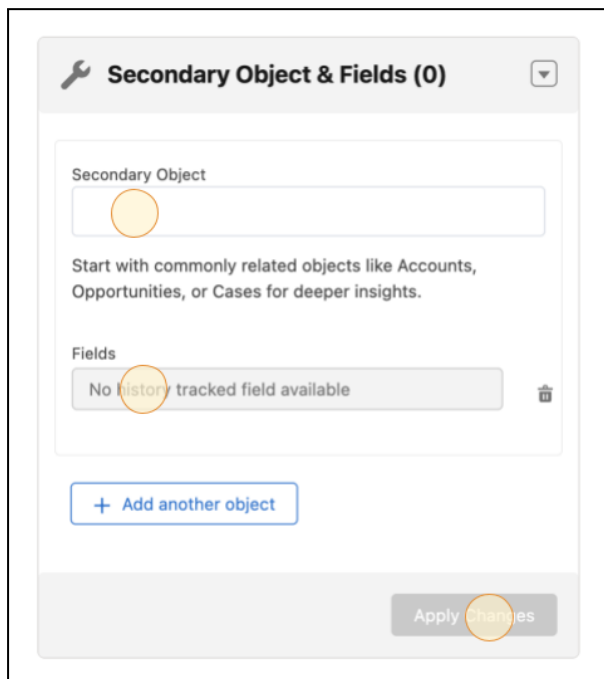
23. You can rename the primary object's display label and add or remove analysis fields for the analysis primary object

This close-up view of the 'Primary Object & Fields (3)' panel shows the 'Primary Object' dropdown set to 'Case'. Below it, the 'Fields' section contains a search bar labeled 'Select process variant fields' and three selected fields: 'Case Owner (Ownerid)', 'Type (Type)', and 'Status (Status)'. Each field has a close button (X). At the bottom of the panel is an 'Apply Changes' button.

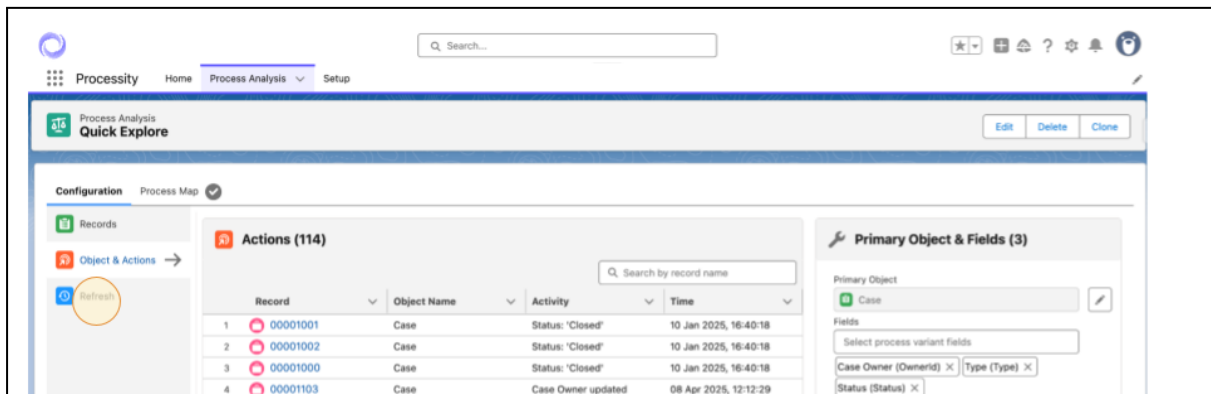
24. You can add, amend, or remove your secondary objects.



25. Select the relationship to the secondary object and select the fields on the secondary object that are important to your process, as well as filters to scope your secondary object correctly, remembering to click the 'Apply Changes' button to save your changes.



26. You can refresh your analysis at any time by clicking the 'Refresh' sub-tab



Support

For any support or assistance, please contact us at support@processity.ai - we look forward to assisting you.