



Integration Discovery Checklist

Ask the right questions before connecting an API, ERP, identity provider, data feed, or vendor platform.

Source -> Auth -> API / files / events -> Validation + mapping -> Record + reconciliation

BUSINESS PURPOSE AND OWNERSHIP

- What decision or workflow improves? Who owns each system?
- Which system is authoritative for every data element?
- What is the manual fallback when the connection fails?

DATA AND WORKFLOW

- Which objects move, and how are records identified?
- Which fields are sensitive, regulated, required, or derived?
- How are duplicates, late events, corrections, and deletes handled?

TECHNICAL ACCESS AND RELIABILITY

- Protocol, auth, scopes, rate limits, versioning, sandbox, support.
- Timeout, retry, partial failure, and vendor-outage behavior.

SECURITY AND OPERATIONS

- Storage, logging, retention, encryption, access, and incident owner.
- Cost, change approval, reconciliation, and exit path.