

CRM API Integration Checklist

 Show only Checklist

Display Style
Default 

Planning & Requirements

Initial planning and gathering requirements for the CRM API integration.

Define Integration Objectives

Write something...

Estimated Data Volume (Records)

Enter a number...



Data Direction (One-Way or Two-Way)

- One-Way (CRM to External)
- Two-Way (Bidirectional)

Target Go-Live Date

Enter date...

Affected CRM Modules

- Accounts
- Contacts
- Opportunities
- Leads
- Activities

External System Name

Write something...

API Key Management & Security

Securely managing API keys, authentication, and authorization protocols.

API Key Description

Write something...

API Key Length (Characters)

Enter a number...

Encryption Method

- AES
- RSA
- None (Not Recommended)

Key Rotation Schedule

Enter date...

Access Control List (ACL) Description

Write something...

Multi-Factor Authentication (MFA) Enabled?

- Yes
- No

Data Mapping & Transformation

Defining data mappings and transformations between systems.

Source CRM Field Type

- Text
- Number
- Date
- Lookup
- Picklist

Destination CRM Field Type

- Text
- Number
- Date
- Lookup
- Picklist

Data Transformation Logic (e.g., formula, concatenation)

Write something...

Decimal Precision (if applicable)

Enter a number...

Date Format Conversion (if applicable)

Enter date...

Data Validation Rules (e.g., required, unique)

- Required
- Unique
- Regex Validation

Default Value (if no source data)

Write something...

Error Handling & Logging

Implementing robust error handling and logging mechanisms.

Describe the error logging strategy (e.g., centralized, per-application)

Write something...

Maximum log file size (in MB)

Enter a number...

Error Severity Levels (e.g., DEBUG, INFO, WARNING, ERROR, CRITICAL)

- DEBUG
- INFO
- WARNING
- ERROR
- CRITICAL

Specify how error notifications will be handled (e.g., email, Slack)

Write something...

Which CRM API endpoints require enhanced error logging?

- /accounts
- /contacts
- /opportunities
- /leads

Last reviewed and updated error handling procedures

Enter date...

Rate Limiting & Throttling

Managing API usage to adhere to rate limits and prevent throttling.

API Request Limit Per Minute

API Request Limit Per Hour

Retry Delay (seconds)

Throttling Strategy

- Token Bucket
- Leaky Bucket
- Fixed Window

Bucket Size (if applicable)

Specific API Endpoint Rate Limits (if different)

Testing & Validation

Thorough testing of the integration, including unit, integration, and user acceptance testing.

Number of Successful API Calls

Number of Failed API Calls

Data Synchronization Accuracy (High/Medium/Low)

 High Medium Low

End-to-End Data Flow Validation (Pass/Fail)

 Pass Fail

Date of Last Successful Integration Test

Detailed Notes on Testing Results/Issues Encountered

Write something...

Specific Data Fields Tested

- Account Name
- Contact Email
- Opportunity Amount
- Case Description

Attach Testing Logs/Screenshots

 Upload File

Deployment & Monitoring

Deploying the integration to production and establishing ongoing monitoring.

Deployment Date

Enter date...

Deployment Window (hours)

Enter a number...

Deployment Checklist Version

Write something...

Deployment Environment(s)

- Development
- Staging
- Production

Deployment Notes/Comments

Write something...

Initial API Call Success Rate (%)

Enter a number...

Deployment Status

- Not Started
- In Progress
- Completed
- Failed

Post-Deployment Validation Results

Write something...

Documentation & Training

Creating documentation for the integration and providing training to relevant personnel.

Integration Design Document Summary

Write something...

API Integration Flow Diagram

 Upload File

Target Audience for Training

- Sales Team
- Marketing Team
- Customer Support
- IT Department

Training Completion Deadline

Enter date...

Training Material Outline

Write something...

Training Delivery Method

- Online
- In-Person
- Hybrid

Compliance & Security Review

Verifying compliance with security policies and regulations.

Regulatory Framework Adherence (e.g., GDPR, CCPA)

- GDPR
- CCPA
- HIPAA
- Other - Specify in Long Text

Specific Compliance Requirements Met (Detailed Explanation)

Write something...

Number of Data Subject Access Requests (DSARs) Processed

Enter a number...

Data Encryption at Rest?

- Yes
- No
- Partial - Specify in Long Text

Data Residency Requirements Complied With?

- Yes
- No
- N/A

Details of Security Audits Conducted (Date & Scope)

Write something...

Security Audit Report (if applicable)

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Maintenance & Updates

Planning for ongoing maintenance and updates to the integration.

Last Maintenance Date

Enter date...

Version Number

Enter a number...

Maintenance Notes

Write something...

Next Scheduled Review Date

Enter date...

Integration Status

- Active
- Deprecated
- Under Development

API Endpoint URL

Write something...