



CRM API Integration Checklist

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