

# CRM Integration Checklist

## Planning & Requirements

Define integration goals, scope, and technical requirements.

### Define Integration Goals

Write something...

### Estimated Number of Records to Integrate

Enter a number...

### Data Direction (One-way or Two-way)

- One-way (CRM to System)
- One-way (System to CRM)
- Two-way

### Data Synchronization Frequency

- Real-time
- Hourly
- Daily
- Weekly