

Integration Questions list

- Which direction is the sync going from ?
 - SF > other system ?
 - is that system accessible via the internet ?
 - does it support OAuth2 ?
 - does it support TLS1.2 ?
 - Does it have a REST or SOAP API ?
 - other system > SF?
 - can it leverage standard SF APIs ?
 - does it support OAuth2 ?
 - does it support TLS1.2 ?
 - both ?
 - all of the above, plus:
 - do the synced tables overlap ?
 - if yes, which system is the master ?
 - how should conflicts be resolved ?
- When is data synced ?
 - on record change ?
 - on user action ?
 - at set time ?
 - a combination of the above ?
- What is the amount of data to be synced, in number of records, per table ?
 - If > 1mil yearly:
 - should we archive old records ?
 - where ?
 - should we delete old records ?
 - are BigObjects a possibility ?
 - can we look into having an external data warehouse where we have the data and SF only pulls what is needed ?
 - is there a 1/1 correlation between tables in SF and backend, or should we do a custom mapping between tables ?
 - are there limits in the other system we need to be mindful of ?

Pre-scoping questionnaire

Does the client backend have any access restrictions?

- [Specific IPs to whitelist?](#)
- Proxy/limited access/etc?
- Does the backend support TLS1.2 minimum?
- Does the backend support OAuth2?
- Are there limits to the number of API calls that can be made?
- Are there limits in payload size?
- Are there limits to the delay in answering a specific call?
- What is the average response time of the API?

Is REST the only viable integration solution?

- Do all the data flows have to be real time?
- Can some data flows be handled via batch nightly loads instead of REST integration?
- Is the tight coupling REST integration forces a problem for the future?
- In case of real-time data sync, has events-based architecture been considered?

Does the client have documentation they can send over?

- Swagger or equivalent?
- Lacking that, basic pdf documentation?
- Lacking that, examples of calls and responses?
- Lacking that, can the client provide a list of supported methods (GET, PUT, POST, etc), and expected formats (JSON, XML) ?

Are all data flow operations possible in the current backend?

- Do endpoints exist for all specified data operations?
- If yes, are they considered stable?
- If no, can new endpoints be developed, or existing endpoints adapted?
- If yes, in which timeframe?
- If yes, is this viable for the current project?
- If multiple calls depend on each other

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