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 he 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**

Revision #3
Created 2019-12-17 13:28:18 UTC by Windyo
Updated 2023-03-07 00:48:44 UTC by thejamesjames