Destination Integration Checklist

**Purpose of This Document:** To collect and standardize all technical, ownership, and data integration details required to connect an external application or platform with **GL** . It ensures alignment on authentication, roles, data formats, sync frequency, and engagement data handling to support a secure and efficient integration process.

1. **General Info**
   1. What is the app/platform to integrate with GL?

List Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* 1. Is it one-way or two-way?

List your response\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. **Roles & Ownership**
   1. Who owns/manages the app?
      1. Eversana Agency
      2. Client
      3. Third party
         1. List name of third party \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   2. Who manages the application (admin)?
      1. Eversana Agency
      2. Client
      3. Third party
         1. List name of third party \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   3. Who is the integration POC?
      1. Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
      2. Email\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. **Authentication**
   1. What auth method is used (API key, OAuth, etc.)?
      1. API Key
      2. Key Pair
      3. Username/ Password
   2. Any credentials or IP whitelisting needed?
      1. Please List\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
3. **Testing**
   1. Is a sandbox/testing environment available?
      1. Yes
      2. No
4. **Documentation**
   1. Is API or integration documentation available?
   2. Are sample payloads or field maps shared?
5. **Data Handling**
   1. Supported formats (JSON, CSV, etc.)?
      1. Please List\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   2. Sync frequency for engagement data
      1. Real time
      2. Batch
   3. Frequency of engagement data from the application?
      1. Daily
      2. Weekly
      3. Monthly
   4. Any API rate limits or payload size limits?
      1. Please list\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
6. **Engagement data**

* Is there an FIA or PLD available?
* See recommended FIA and PLD below
* url….