

## BUYER'S GUIDE

# The Ultimate Integration Buyer's Checklist

## (2026 Edition)

InterWeave Editorial • July 2026 • 28 questions, 7 categories

Integration platforms all demo beautifully. The differences that matter — what happens when an API changes, when volume spikes, when a flow touching money fails at 2 a.m. — never appear on the demo script. This checklist is built to surface them. Put the same 28 questions to every vendor, score the answers, and the decision usually makes itself.

*How to use this scorecard: for each question, score every vendor 1–5 (or use ✓ / X / ~) in its column. Blank or evasive answers score a 1. Totals at the end make the comparison objective instead of a gut call.*

### 1. Security & Compliance

*Disqualifying questions first*

| # | Question                                                                                       | InterWeave                                                                                                                                                                                                                                                                | Vendor B | Vendor C |
|---|------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|----------|
| 1 | Can you share a current SOC 2 Type II report — including the exceptions section?               | Yes — our platform runs on Rackspace Managed Hosting infrastructure, which holds current SOC 2 Type II and SOC 3 attestations plus ISO 27001 certification. The full report, including the exceptions section, is available under NDA through the Rackspace account team. |          |          |
| 2 | Is all data encrypted in transit (TLS 1.2+) and at rest (AES-256), including queues and logs?  | Yes. Rackspace-hosted storage and transport encrypt data at rest with AES-256 and in transit with TLS 1.2, meeting FIPS 140-2 standards; all UI/API access is HTTPS-only, covering queues and logs.                                                                       |          |          |
| 3 | How do payment flows stay PCI-compliant — is card data fully tokenized and out of our systems? | Our data centers are PCI DSS-compliant and Rackspace holds Level 1 PCI Service Provider status. Card-data tokenization specifics are handled at the application layer — to be confirmed with our product team.                                                            |          |          |
| 4 | Do you support least-privilege API credentials and role-based access for our team?             | Yes. Rackspace supports role-based access control (global and product-level roles) built on least-privilege IAM principles, plus identity federation so your team can authenticate with existing corporate credentials.                                                   |          |          |
| 5 | Will you sign a BAA if we handle health data?                                                  | Yes. Rackspace signs a Business Associate Agreement (BAA) covering HIPAA-eligible hosted services.                                                                                                                                                                        |          |          |

### 2. Scalability & Reliability

*What happens at 10× volume?*

| # | Question                                                                                          | InterWeave                                                                                                                                                                                                                                                                                       | Vendor B | Vendor C |
|---|---------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|----------|
| 6 | How are bursts handled — queuing, throttling, retries — and what's the guaranteed-delivery story? | Transient failures trigger configurable retry sequences with exponential backoff and compensating transactions; every write and retry is logged with a unique syncId for traceability. Detailed queuing/throttling architecture for peak-volume bursts — to be confirmed with our platform team. |          |          |

| # | Question                                                                                        | InterWeave                                                                                                                                                                                                                                                                                                                                                                              | Vendor B | Vendor C |
|---|-------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|----------|
| 7 | What happens when a destination system is down for six hours? Show the recovery, not the slide. | The platform is self-healing and AI-governed: <b>SmartAgents</b> include exception handling and anomaly detection, expired credentials are re-authenticated transparently, and retries use exponential backoff with compensating transactions until the destination recovers. Extended-outage recovery specifics (queue depth, replay window) — to be confirmed with our platform team. |          |          |
| 8 | How do you manage each platform's API rate limits at month-end volumes?                         | Not published in detail. Rate-limit handling is managed per connector by our engineering team; happy to walk through month-end volume handling in a technical session.                                                                                                                                                                                                                  |          |          |
| 9 | What's your published uptime, and what does the SLA actually credit?                            | Rackspace backs our hosting with published SLAs — up to a 100% network uptime guarantee on managed hosting and 99.9% monthly availability on cloud services — with a documented credit process for qualifying incidents reported within 30 days.                                                                                                                                        |          |          |

### 3. No-Code & Configurability

*Who can change a flow — and who must?*

| #  | Question                                                                                                           | InterWeave                                                                                                                                                                                                                                                                             | Vendor B | Vendor C |
|----|--------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|----------|
| 10 | Can a business analyst modify a field mapping or approval threshold without a developer?                           | Yes. Sync objects and field mappings are configured through a no-code console (prebuilt <b>SmartMaps</b> or custom mappings) with no IT required. AI agent approval thresholds — confidence levels, invoice-aging windows, discount limits — are also set via configuration, not code. |          |          |
| 11 | Are common processes (quote-to-cash, payment reconciliation, dunning) pre-built, or built from scratch every time? | Pre-built. Industry Accelerators provide prebuilt frameworks (Financial, Healthcare, Manufacturing, Insurance, Nonprofit, Education, Payments), and our AR-Agent handles reconciliation and dunning (escalating payment reminders) out of the box.                                     |          |          |
| 12 | How are changes tested and promoted — is there a sandbox, and version history with rollback?                       | Sandbox availability and version history/rollback specifics to be confirmed with our platform team.                                                                                                                                                                                    |          |          |
| 13 | When the vendor's connector updates for an API change, do our flows keep working without rework?                   | Largely yes for common failure modes — e.g., expired tokens are re-authenticated transparently with no flow failures from stale credentials. Broader connector-version compatibility guarantees — to be confirmed with our platform team.                                              |          |          |

## 4. AI Capabilities

*Real agents or a chatbot on the pricing page?*

| #  | Question                                                                                                  | InterWeave                                                                                                                                                                                                                                                                                              | Vendor B | Vendor C |
|----|-----------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|----------|
| 14 | Can AI agents take multi-step actions — retry, notify, escalate — or only classify and summarize?         | Yes, full multi-step action. <b>SmartAgents</b> observe data, reason over it, and act — reconciling AR, resolving exceptions, routing approvals, and closing the loop across systems (e.g., resending payment reminders, updating CRM opportunity stages, escalating to a human when confidence drops). |          |          |
| 15 | Are approval thresholds and human-in-the-loop checkpoints native platform features?                       | Yes. Confidence thresholds, invoice-aging windows, discount limits, and custom triggers are configurable; agents act autonomously above threshold and escalate to a named human owner below it.                                                                                                         |          |          |
| 16 | Is every AI decision logged with what it saw, what it did, and why?                                       | Yes. Every decision is fully traceable via the IWSyncRegistry in real time, capturing the observation, the reasoning/confidence score, the action taken, and the resolution — a complete audit trail for compliance, debugging, and human review.                                                       |          |          |
| 17 | Can autonomy be dialed per process, so payment retries and contract credits carry different trust levels? | Yes. Confidence thresholds are set per agent in configuration, so higher-value/higher-risk processes (e.g., payment retries) can require a higher confidence score before acting autonomously than lower-risk operational tasks (e.g., contract credits).                                               |          |          |

## 5. Monitoring & Visibility

*You can't manage a flow you can't see*

| #  | Question                                                                                                    | InterWeave                                                                                                                                                                                                                                | Vendor B | Vendor C |
|----|-------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|----------|
| 18 | Is there a live dashboard of every flow's health, throughput, and error rate — readable by a non-developer? | Yes. Real-time dashboards with alerts and audit trails are part of the no-code console, designed to be read by business users, not just developers.                                                                                       |          |          |
| 19 | When a record fails, does it land in an exception queue with context and an owner, or in a log file?        | Exceptions carry context, not just a log entry: <b>SmartAgents</b> include exception handling and anomaly detection with human-in-the-loop escalation to a named owner (e.g., "below action threshold — escalating to finance_lead@..."). |          |          |
| 20 | Can we trace one customer record end-to-end across systems with a full audit trail?                         | Yes. Every transformation, write, and retry is logged with a unique syncId, source/destination record IDs, timestamp, duration, and status — queryable, and built to support SOX and SOC 2 audit requirements.                            |          |          |
| 21 | Do alerts reach us before our customers notice — configurable by severity and channel?                      | Real-time dashboards include alerting; specifics on proactive severity/channel configuration — to be confirmed with our platform team.                                                                                                    |          |          |

## 6. Support & Partnership

*Who answers when money stops moving?*

| #  | Question                                                                    | InterWeave                                                                                                                                                                                                                                                                                                                                                                                                             | Vendor B | Vendor C |
|----|-----------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|----------|
| 22 | Who implements — your team, ours, or a third-party SI we have to hire?      | Primarily self-service/customer-led with <b>InterWeave</b> guidance — the <b>SmartTracks</b> Program provides structured onboarding (connect platforms, configure sync objects, initial data load, go live) with no IT team or third-party SI required; one customer reported going live in four days. Larger Enterprise/Ultimate engagements can include dedicated implementation support — confirm scope with sales. |          |          |
| 23 | What are real response times for a production-down issue on a revenue flow? | Standard support carries a 48-hour SLA included in all tiers; premium support and a dedicated Technical Account Manager (faster response) are available as an add-on. Severity-specific commitments for production-down issues — to be confirmed with our support team. A <b>Smart</b> *Support Agreement is presented to the client when they move to Production, to support their exact requirements.                |          |          |
| 24 | Do we get a named contact who knows our flows, or a ticket queue?           | Standard support is ticket-based (open a ticket, our team responds directly); a named/dedicated contact is available via premium support or a dedicated TAM add-on.                                                                                                                                                                                                                                                    |          |          |
| 25 | Can you give us three references at our size, on our systems?               | Yes — reference customers on comparable CRM/ERP stacks are available, e.g. Customer 1. (Salesforce + QuickBooks since 2007), Customer 2 (custom recruiting + Sage 50) 2012, and Customer 3. (Salesforce + QuickBooks + MindBody + Runpayments) 2020 and 2 others. Customer 4. (Sage Intact, Paycom, Salesforce) and others. Additional references matched to your size/stack available on request.                     |          |          |

## 7. Pricing & Total Cost

*The five-year number, not the year-one number*

| #  | Question                                                                                                 | InterWeave                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Vendor B | Vendor C |
|----|----------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|----------|
| 26 | What drives price — tasks, records, connectors, flows?<br>What does our volume cost at 2x and 5x growth? | Price is driven by platform tier and Systeme integrated. For larger integrations - (Professional \$2,500/mo, Enterprise \$6,000/mo, Ultimate \$15,000+/mo), transaction volume (50K/month on Professional up to unlimited on Ultimate), and connector quantity/complexity (premium connectors \$350–\$5,000/mo); AI <b>SmartAgents</b> run \$500–\$2,500 per agent/month. Exact cost at 2x/5x volume depends on tier breakpoints — to be scoped with sales. |          |          |
| 27 | Is implementation a fixed scope or open-ended billable hours?                                            | Fixed scope, not billable hours. A discovery session produces a scoped proposal with specific connectors, timelines, and milestones.                                                                                                                                                                                                                                                                                                                        |          |          |
| 28 | Are connector updates and maintenance included, or a separate line?                                      | Standard support (48-hour SLA) is included in all tiers; whether ongoing connector maintenance beyond that is bundled or billed separately isn't detailed publicly — to be confirmed with sales.                                                                                                                                                                                                                                                            |          |          |

| #  | Question                                                                             | InterWeave                                                                                                                                                                             | Vendor B | Vendor C |
|----|--------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|----------|
| 29 | What does leaving cost — can we export our mappings and history, or are we hostages? | Not published — exit costs and data/mapping export terms aren't detailed on the pricing page. Confirm data portability and audit-trail retention terms in the contract before signing. |          |          |

## Vendor Totals

| Category                     | InterWeave | Vendor B | Vendor C |
|------------------------------|------------|----------|----------|
| 1. Security & Compliance     |            |          |          |
| 2. Scalability & Reliability |            |          |          |
| 3. No-Code & Configurability |            |          |          |
| 4. AI Capabilities           |            |          |          |
| 5. Monitoring & Visibility   |            |          |          |
| 6. Support & Partnership     |            |          |          |
| 7. Pricing & Total Cost      |            |          |          |
| <b>TOTAL</b>                 |            |          |          |

*"The best vendor answer to any of these is specific, boring, and verifiable. Be suspicious of exciting answers."*

— InterWeave Integration Services

We publish this list knowing our own platform will be scored against it — that's the point. **InterWeave** was built to answer these 28 questions well: SOC 2-aligned security, tokenized payment flows, pre-built processes on 200+ maintained connectors, human-in-the-loop **SmartAgents**, full-visibility monitoring, and a named team that knows your flows. Bring the checklist to the demo.

**InterWeave** [interweave.biz/contact-us](https://interweave.biz/contact-us)