Your Complete IDP Integrations Checklist

A practical integration roadmap so your team is fully synchronized for success



Why Integrations are Becoming Increasingly Important

As organizations scale and technology evolves, more information needs to be leveraged to stay competitive. Integrations provide a way to keep this data accessible across departments and locations, while using it to automate tasks and create competitive advantages.

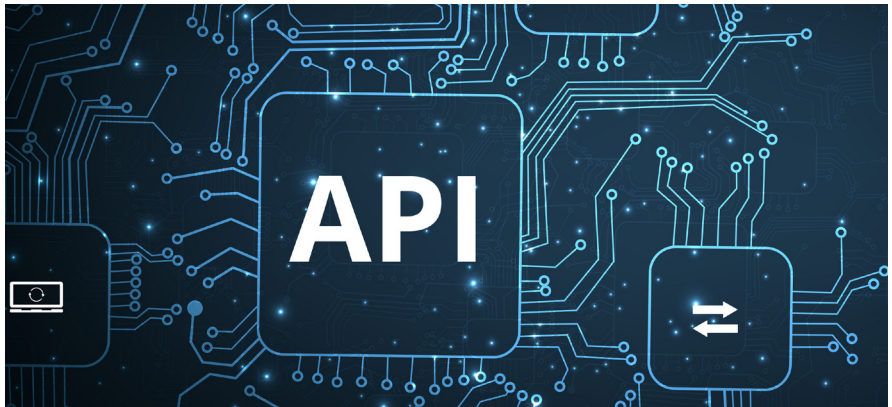
On average, organizations use 7-10 different systems to manage their information (AIIM).

95% of IT leaders identify integration challenges as a significant obstacle to implementing AI solutions effectively (Mulesoft).

75% of AI initiatives fail to scale, partly due to integration and data variety challenges (TechRadar).

What You'll Find on This Checklist

This checklist details the benefits of integrations, their importance in connecting your business, and crucial steps for any integration to help you drive success.



Types of Integrations

Different types of integrations often require different approaches to ensure the results you're looking for. Below are some available integration options and the situations in which they are most effective.

iPaaS Integrations: Some IDP providers offer integration platforms as a service or iPaaS. These integrations need minimal implementation time and create very few disruptions. They do require both platforms to be integrated to have a REST-based API.

Database Integration: Database integrations require some hard-coding, but allow platforms without APIs to automate more processes. These integrations can be disruptive without proper knowledge of both platforms, making it essential to choose a provider with expertise.

Flat File Integration: Flat File integrations export the data to a CSV file to be routed to and read by a financial solution. These integrations are simple and low-disruption, but their capabilities are limited, and data often only flows in one direction.

IDP providers with highly knowledgeable specialists can help you determine which options are ideal for what you are trying to achieve.

Integrations: The Key to Seamless Automation

Digital solutions are crucial to automating processes and managing your information, but much of the data in these systems is siloed within individual platforms. This leads to:

- **Duplicated Work**
- **Inconsistent Data and Errors**
- **Challenging Collaboration**
- **Limited Information Visibility**
- **Scaling Challenges**
- **Lost Productivity**

Quick Quiz: What are Siloed Systems Costing You?

(1 point for each question that applies to your organization)

- ☐ **Do you find yourself entering the same data multiple times?**
- ☐ **Does your data frequently contain errors?**
- ☐ **Is it difficult to get visibility into processes or report on information?**
- ☐ **Are your staff frequently faced with outdated, inaccessible information?**

If you scored a point for even one of these issues, integrations can provide substantial benefits for you.



Steps to Ensure Effective Integrations

Integrations enhance collaboration, information access, and efficiency by connecting information across your systems and automating additional tasks. But even with these benefits, a poorly implemented integration can set back your ROI immensely. The following steps will help ensure your integrations provide real, tangible value.

1. Choose the Right IDP Solution

Not all IDP solutions are integration-friendly, especially when it comes to industry-specific line-of-business applications. Look for a platform that:

- ☑ Has proven integrations with your applications.
- ☑ Offers low-code or no-code configuration options.
- ☑ Supports real-time data exchange and workflow automation.

2. Confirm Access Compatibility Between Platforms

Before investing in an IDP solution, evaluate whether it:

- ☑ Works natively with your other platforms or requires third-party middleware.
- ☑ Can adapt to custom fields and workflows from other applications.
- ☑ Supports scalability for future growth.

3. Configurability Over Customization

Custom-built integrations may seem ideal, but they are often costly and difficult to maintain. Instead, look for configurable solutions, allowing for tailored workflows without extensive IT development.

4. Test & Vallidate Before Full Deployment

Before rolling out an integration across your organization:

- ☑ Run a pilot program with a small sample of documents.
- ☑ Validate the data to ensure accuracy.
- ☑ Optimize workflows to eliminate inefficiencies before scaling.

5. Securing Ongoing Support & Scalability

As automation platforms continue to evolve, you'll want to take advantage of the latest tools and automation efforts to stay competitive. Ensure your integration offers:

- ☑ **Continuous support** to troubleshoot integration issues.
- ☑ **Automatic updates** to stay compatible with new versions of integrated solutions.
- ☑ **Scalability** to accommodate growth, acquisitions, or new automation needs.

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E: info@square-9.com | **P:** 203-789-0889 | **W:** square-9.com

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