
The 4 Core Principles for Auditing Business Integrations

Square 9 highlights how accurate data capture, flexible workflows, and secure connectivity help organizations get more value from their business systems.

New Haven, CT, October 15, 2026 – [Integrations](#) connect business systems, keep teams informed, and extend existing automation. But to deliver meaningful value, they must be implemented strategically. Across departments such as accounts payable, human resources, and order processing, organizations can evaluate integrations against four core principles to improve efficiency, avoid unnecessary complexity, and maximize return on investment (ROI).

As organizations continue investing in core systems like enterprise resource planning (ERP) and customer relationship management (CRM), they often leave crucial data unleveraged in invoices, purchase orders, contracts, and other documents. When teams capture these documents digitally with platforms like Square 9 but don't share the data with core systems, they spend valuable hours manually rekeying it, losing time and reducing visibility. Vetting your integrations helps you adopt a more targeted approach to automation.

Leading organizations focus on four key principles when evaluating integrations:

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1. **Targeted Value:** Rather than launching large, complex projects to connect every system, effective integration strategies focus on high-value use cases. Lightweight integrations can move specific information between applications at key points in a workflow, such as updating an ERP system after invoice approval or triggering CRM alerts for contract renewals. This targeted approach helps organizations prioritize improvements and realize value incrementally.
 2. **Accuracy at the Source:** Business applications are only as reliable as the data feeding them. Leverage generative AI-powered capture to extract and structure information such as headers, line items, and handwritten notes. These systems help reduce manual entry errors and improve data quality before information reaches core systems.
 3. **No-Code Agility:** Current integration strategies prioritize accessibility and adaptability. Intuitive, no-code workflow designers let staff configure, manage, and adjust integration systems across departments without relying on overburdened IT teams.
 4. **End-to-End Compliance and Security:** Connected systems must meet strict data governance standards to comply with regulations. Secure platforms protect sensitive records in fully encrypted, SOC- and HIPAA-compliant environments, preserving complete audit trails as information moves across applications.

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Square 9 Softworks helps organizations put these principles into practice with generative AI-powered Intelligent Document Processing (IDP) and workflow automation. Its solutions capture information from documents, transform it into structured data, and make that information available to connected business applications and workflows.

By auditing existing workflows and applying these core principles, organizations can reduce manual work, strengthen data accuracy, and ensure connected, future-ready automation.

To find out more about integration best practices, get your [integration checklist](#).

About Square 9 Softworks®

[Square 9 Softworks](#) is a provider of generative AI-powered Intelligent Document Processing (IDP) and workflow automation software. Square 9 captures data from documents, forms, emails, and other unstructured content, then uses AI to transform that information into accurate, structured, searchable data that can be securely shared with business applications and workflows.

Organizations use Square 9 to automate processes such as accounts payable, invoice processing, order processing, vendor onboarding, contract management, and other

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document-driven workflows. By reducing manual data entry and repetitive tasks, Square 9 helps organizations improve efficiency, accelerate business processes, and make better use of their information.

Square 9 delivers a 15-month average ROI, the fastest average ROI among the document management providers compared on G2, where competitors range from 17 to 29 months. The comparison is based on G2 User Satisfaction Ratings as of August 2, 2026.

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