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AI agent connection checklist

Check access, field matching, failure handling, and maintenance ownership.

- [ ] **Document access requirements**

  For each system, record the access method, expiry schedule, permissions, and what happens when a team member leaves.

- [ ] **Map the actual fields**

  Check the live field names, identifiers, source meaning, and relevant changes. Define how records are matched across tools.

- [ ] **Limit and review permissions**

  Grant only the required reads and writes. Use a service account or role where supported, with an owner, expiry checks, and access reviews.

- [ ] **Define exception handling**

  Specify what happens with no result, multiple matches, a missing required field, or a temporarily unavailable system. Name the reviewer and pause path.

- [ ] **Verify before repeating a write**

  Test an interrupted update or missing confirmation. Check whether the change happened before repeating a consequential action; hold uncertain results for review.

- [ ] **Assign ongoing responsibility**

  Monitor errors and completed outcomes, compare outputs with source records, and test after relevant tool or workflow changes.

Source article

https://yardwork.dev/en/blog/why-connecting-ai-agents-to-real-systems-is-harder-than-it-looks