

Integrations and Business Operations QA

Lesson 9 · The business outcome crosses system boundaries

Today's outcome

- Map email, OAuth, webhook, and CRM flows
- Test success, failure, retry, and recovery
- Protect consent and customer trust
- Separate technical delivery from business success

Inquiry-to-CRM map

Customer email → identity/trust boundary → classifier → CRM contact → consent → queue/message → audit trail

At every arrow, ask: what can fail, repeat, delay, or be misunderstood?

Integration test questions

- Did the event arrive?
- Was it authentic and correctly parsed?
- Was it stored once, in the right tenant/state?
- Did consent rules apply?
- Did the customer get the right outcome?
- Can failure recover safely?

OAuth: treat credentials as hazardous

Test redirects, state, expired authorization, denial, and recovery with dedicated synthetic identities.

Do not put secrets in prompts, recordings, screenshots, tickets, or chat.

Idempotency matters

Real systems retry.

One event may arrive twice. A success response may be lost. A webhook may be delayed. Correct behavior must remain safe.

Demo: healthy flow then duplicate event

Inspect stored event count, consent/confidence, processing state and queued decision.

Contact updates, classifier accuracy and real delivery are not implemented.

“Webhook returned 200” is only one piece of evidence.

Lab: Inquiry-to-CRM Reliability

Use the supplied healthy JSON and one failure/recovery card. Mark implemented, simulated and absent components separately.

Deliver: integration map, evidence packet, recovery decision, regression candidate.

AI at the boundary

AI can classify, summarize, and route low-risk work.

Low confidence, ambiguity, consent, financial commitments, and external sends belong in a controlled review path.

Exit ticket

Why is a technical success status not sufficient proof of business success?