Integration
TECHNOLOGIES

InterWeave **Smart** Solutions

The 8 Steps to Complete your Integration with Creatio_QuickBooks

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The 8 Steps to Complete your Integration with Creatio_QuickBooks with Inter Weave **Smart** Solutions

Welcome to the 8 Steps to build your **Inter**Weave **Smart** Solution. There is a pre-curser document to this one, "Your Onboarding Checklist for your Creatio_QuickBooks Integration". If you haven't had a chance to preview this, please do so now, as it will present the **Inter**Weave Models for you to make your A/R and A/P components visible and ready for your customization.

The main customer portal login is located at http://www.interweave.biz/ – select **"Customer Login"** on the header top bar.

Your **Smart** Solutions Technical Specialist will work with you to execute the steps below.

Step 1 – Creatio Custom Sections & Fields Initial Setup

When you have returned your "**Inter**Weave Creatio_QuickBooks Integration Planning Survey" with Integration Model Selection to your **Inter**Weave Technical Specialist, he will install an **Inter**Weave unmanaged package to create the Custom Sections, Objects and Fields in your Creatio to support the integration once you have given him a Creatio User ID and Password with administrative capability.

InterWeave Technical Specialist – **To Do:**

- Customize/update Creatio with mandatory custom Fields & Sections at Object level
- Customize/update Creatio with optional custom Fields at Object/Section level

Step 2 – QuickBooks Custom Field & Integration User Setup

InterWeave **Technical Specialist** – **To Do:**

- Customize/update QuickBooks with custom field at Object Level
  - We will create a Custom Field in your QuickBooks Customer and Vendor object called "**AccountID**". This field is used to bind the Creatio Account record to the QuickBooks Customer and Vendor record.
  - We will create a Custom Field in your QuickBooks Item object called "**ProductID**". This field is used to bind the Database Product record to the QuickBooks Item record
  - We will create the integration user for your **Inter**Weave Company Profile.

Step 3 – Check SF and QuickBooks connectivity to API end points

InterWeave **Technical Specialist – To Do:**

- Check connectivity to Creatio REST API endpoint
- Check connectivity to QuickBooks REST API endpoint

Step 4 – Registration & Solution Profile Configuration on the InterWeave Solutions Portal

InterWeave **Technical Specialist – To Do**

- Your **Inter**Weave Technical Specialist will pre-populate your Solution with the correct Object and Field selections based on the "**Integration Planning Survey**" and all transaction forms and screen shots provided by customer at the time of completed survey return, to support your uni or bi-directional integration and assist you with further customization

Customer - To Do

- Work with **Inter**Weave Technical Specialist to configure the InterWeave Solutions Portal For best result, have Accounting Operations and Sales Operations work with your **Inter**Weave Technical Specialist in completing your Solutions Configuration

Step 5 - Register in the InterWeave Case Management Solution

To create a Case in our Desk.com Case Management Solution, here are the instructions.
Customer - To Do

1. Go to our home page; www.interweave.biz
2. At the bottom of the page, under SOCIAL MEDIA, click on the Support Person icon – third from the left.
3. This will bring you to https://interweave.freshdesk.com/support/home (our Forum)
4. You will notice one entry; the Login Button (black)
5. Click on Login, and go to the bottom left of the page; and click on **Create an Account**
   a. Enter your email address and password to access your Cases
6. Enter your email address and click on Send Instructions.
   a. You will receive and authentication email titled - InterWeave Smart Solutions support registration

7. Click on Click Here, this will take you back to the Forum, where you enter your email address and password – you're in

8. Click on My Cases to create a new case or to view/update existing cases

Step 6 – Initialization of QuickBooks

Customer - To Do

- Before you start testing, you need to make sure QuickBooks is ready.

    - Check if QuickBooks connection functioning properly
    Log in to your QuickBooks server as a user under which the QuickBooks app is located. Make sure the QuickBooks app is running.

Step 7 – Activation of Flows and Testing

InterWeave Technical Specialist – To Do

- Your **Inter**Weave Technical Specialist will assist you with specifying Test Cases as relates to the A/R and A/P Models you selected.

Customer - To Do (With the assistance of **Inter**Weave Technical Specialist)

- Log into the **Inter**Weave Solutions Portal

- **Utility Flows vs. Scheduled Flows**

- When your company profile customization has been completed together with **Inter**Weave Technical Specialist, you click on the "Save and Finish" button on the last page. This action creates your Master Console and both Utility Flows and Scheduled Flows. Utility Flows are for one-off testing of an Object-to-Object transaction. One-off means that it's a one-to-one transaction. For example, if you were going to test a Creatio Opportunity to QuickBooks Invoice, there is an assumption that you have already run the Creatio Product to QuickBooks Item and Creatio Account to QuickBooks Customer, since both are required in QuickBooks to create an Invoice.

- Commence testing individual Utility Flows (Objects)

- Customer will need to create test QuickBooks Item(s) to test Creatio Product(s) first so Product Line Items will be available to be selected under Creatio Opportunities.

- **Creatio to QuickBooks Testing:**

    - Creatio Account to QuickBooks Customer

    - Creatio Opportunity or Quote to QuickBooks Invoice

- **QuickBooks to Creatio Testing:**

    - QuickBooks Customer to Creatio Account

    - QuickBooks Invoice to Creatio Opportunity or Quote

Step 8 – Binding and Production

InterWeave **Technical Specialist – To Do**

- When your testing is complete, you will create a case in our Desk.com Support System to run the binding flows to bind Creatio accounts to QuickBooks customers
  - Create your Case for Binding using our Desk.com Case Management Solution.
  - There will most likely be multiple runs as you correct your Creatio Account Names to match exactly your QuickBooks Customer and Vendor Names.

Customer - To Do

- When Data is clean and matched, your **Inter**Weave Technical Specialist will assist you to Log into the **Inter**Weave Solutions Portal, set your Flow timings – and assist you in monitoring your **Inter**Weave Solution.

Next Steps – Bulk Loading history from your QuickBooks

InterWeave **Technical Specialist – To Do**

- If you have selected Smart+ Support, then Bulk Loading (QuickBooks to Creatio) is available to you for current and prior year.
  - Create your Case for Bulk Loading using our FlexQuarters Case Management Solution.