



Creatio_QuickBooks Integration Planning Survey

Integration Technologies, Inc.

December 21, 2022

V6.03

Integration Technologies Ownership Information. The information in this document, along with any future Materials or derivatives (including, for example, white papers, press releases, data sheets, product descriptions and FAQs) is the copyrighted work of Integration Technologies and/or its suppliers and is protected under US and worldwide copyright laws and treaty provisions. Integration Technologies grants you permission to copy such Materials so long as each copy (i) is solely for informational, non-commercial use in support of Integration Technologies products and is not modified or revised in any manner, (ii) plainly displays all copyright and other proprietary notices, in the same form and manner as on the original *and* (iii) displays a statement that the Materials are used solely with permission of Integration Technologies.

Creatio_QuickBooks Integration Planning Survey

Thank you for subscribing to **InterWeave** from Integration Technologies, Inc.

The following information will help us help you implement and use your **InterWeave** Solution to your company's best advantage. We look forward to working with you.

Expectations	
What is your definition of a successful project?	
What has made this project a key initiative?	
Who is responsible for those results?	Name: Email: Phone:
Do you need assistance?	
In the optimization or deployment of Creatio?	Contact: Name: Tel:
Do you need help in the defining of the requirements of the integration?	Contact:
Who's Who	
What is your company's name?	
Who is the Creatio administrator in your company?	Name: Email: Phone:
Who is the QuickBooks administrator in your company?	Name: Email: Phone:
Who will be the InterWeave administrator in your company?	Name: Email: Phone:

<p>Who will be the InterWeave integration user (a Creatio user with admin capability) in your company?</p> <p>Important Note: For bi-directional integration, this user has to be inactive in daily operations because any changes (creation, updating and so on) in Creatio and/or in QuickBooks will not be moved over by Integration Solution (InterWeave) and will not be used in production flows due to the Repetition Protection feature of the Solution. For uni-directional integration, have one Creatio/QuickBooks user is ok.</p>	<p>Name:</p> <p>Email:</p> <p>Phone:</p>
<p>Who provides IT support for your company?</p> <p>Is this a staff person [] or contracted []?</p>	<p>Name:</p> <p>Email:</p> <p>Phone:</p>
<p>Who should receive our Subscription Contract and Invoice for InterWeave?</p>	<p>Name:</p> <p>Email:</p> <p>Phone:</p>
<p>Who should receive InterWeave Support Bulletin emails?</p>	<p>Name:</p> <p>Email:</p> <p>Phone:</p>
<p>Who should have access to the InterWeave Support web site?</p>	<p>Name:</p> <p>Email:</p> <p>Phone:</p>

QuickBooks Configuration

How long have you been using QuickBooks?	<input type="checkbox"/> Years <input type="checkbox"/> Months
What version of QuickBooks do you use?	<input type="checkbox"/> US 2016 <input type="checkbox"/> US 2017 <input type="checkbox"/> US 2018 <input type="checkbox"/> US 2019 <input type="checkbox"/> US 2010 <input type="checkbox"/> US 2021 <input type="checkbox"/> US 2022 <input type="checkbox"/> US OBO 2023 <input type="checkbox"/> US CDN 2023 <input type="checkbox"/> Other; please specify:
How many QuickBooks licenses do you have?	<input type="checkbox"/> Licenses
Does the computer/server have a Static IP Address?	<input type="checkbox"/> Yes <input type="checkbox"/> No
How can we access this computer/server?	<input type="checkbox"/> Remote Desktop <input type="checkbox"/> VNC <input type="checkbox"/> Other:
Where is your QuickBooks data file stored?	<input type="checkbox"/> On a server/file server on your network <input type="checkbox"/> On a server/file server – ISP hosted
Please list any shopping cart, shipping or other third-party systems that QuickBooks is integrated with.	
Creatio Configuration	
How long have you been using Creatio?	<input type="checkbox"/> Months <input type="checkbox"/> Years
What edition of Creatio do you use?	<input type="checkbox"/> Team <input type="checkbox"/> Commerce <input type="checkbox"/> Enterprise <input type="checkbox"/> Other; Bundle, please specify:
How many Creatio licenses do you have?	<input type="checkbox"/> Licenses

Creatio Custom Fields Setup

If you would like our staff to set up your Creatio custom fields and finalize the layouts for you, please provide us a Creatio user ID and password with Setup access to your Creatio account.

User ID:
Password:

Customer/Account Data

How many customers and jobs do you have in QuickBooks, in total?
(In QuickBooks, open the window that displays this information.)

Total Accounts: ____
Total Names: ____
Total Customers: ____

Do you use Parent and Child Accounts in Creatio?
If yes, do you want to mimic this hierarchy in QuickBooks?

___ Yes
___ No
Comments:

How many accounts do you have in Creatio?

___ Accounts

Are your account names in Creatio unique?

___ Yes
___ No

Item/Product Data

If you have the same product in Creatio and Item in QuickBooks, how do you prefer to match?
Creatio Product Name – QB Item Name?
Creatio Product Code – QB Item Code (custom field)

___ Yes
___ No
Comments:

InterWeave AR/AP Track Selection

We pre-configure **InterWeave** Models to support base Accounts Receivable and Accounts Payable functionality in your Creatio. Please Review and select which Track you would like us to pre-configure for you.

Track 1

- Account and Opportunity created in Creatio
- Opportunity Closed with triggers:
 - Customer Created in QB
 - Invoice Created in QB.
- Payment received in QB and sent to Creatio (applied to Opportunity)
- Refund created in QB and sent to Creatio (applied to Opportunity)

Track 2

- Account and Opportunity created in Creatio
- Opportunity Closed with triggers:
 - Customer Created in QB
 - SO Created in QB.
- Opportunity set to Invoiced stage which triggers SO converted to Invoice in QB.
- Payment received in QB and sent to Creatio (applied to Opportunity)
- Refund created in QB and sent to Creatio (applied to Opportunity)

Track 3

- Account and Opportunity created in Creatio
- Opportunity Closed which triggers:
 - Customer Created in QB
 - SO Created in QB.
- SO is converted to Invoice in QB and corresponding Opportunity updated in Creatio
- Payment received in QB and sent to Creatio (applied to Opportunity)
- Refund created in QB and sent to Creatio (applied to Opportunity)

Track 4

- Account and Opportunity created in Creatio
- Opportunity Closed which triggers:
 - Customer Created in QB
 - SO Created in QB.
- SO is converted to one or multiple Invoices in QB and corresponding Quotes (can be renamed to Invoices) are created in QB linked to proper Opportunity
- Payment received in QB and sent to Creatio (applied to Quote)
- Refund created in QB and sent to Creatio (applied to Quote)

Check Box below

Track 5

- None of the above. Please see our Custom Process below



Based on my selections above, I have included the following copies in pdf form and screen shots of the Template (example below).

- Invoice
- Sales Order
- Sales Receipt
- Estimate
- Purchase Order

Which QuickBooks item types are you planning to integrate?

- Groups
- Service
- Inventory part/Stock part
- Inventory assembly/Stock Assembly
- Non-inventory part/Non-stock part
- Other charge
- Subtotal (not synched to Creatio)
- Discount
- Other:

When you create new products, which system is considered the Master of Record?

- QuickBooks
- Creatio We would like it to be for simplicity sake.

Transaction/Opportunity Data

Do you work in a single currency?

- Yes

If you have more than one currency, what currencies do you use in QuickBooks and/or Creatio?

- No
- Comment:

Initial Setup

Do you need an initial data Bulk Load into Creatio or QuickBooks?

Yes

No

- Current year Data Load is included in the annual subscription.

If data is already resident, do you need an initial data binding between Creatio and QB?

Yes

No

Data Bulk Load Request

Please specify the following:

Accounts/Customers

1. What type of data history you want to load (QB Object Name – Creatio Object Name)
2. History for what period of date/time you want to load.
3. Which direction you want to load (QB to Creatio or Creatio to QB)

Object Name(s):

Date/Time Period:

Load Direction: QB to Creatio

Creatio to QB

Please specify the following:

Opportunities or Quotes/Invoices

4. What type of data history you want to load (QB Object Name – Creatio Object Name)
5. History for what period of date/time you want to load.
6. Which direction you want to load (QB to Creatio or Creatio to QB)

Object Name(s):

Date/Time Period:

Load Direction: QB to Creatio

Creatio to QB

Please specify the following:

Products/Items

7. What type of data history you want to load (QB Object Name – Creatio Object Name)
8. History for what period of date/time you want to load.
9. Which direction you want to load (QB to Creatio or Creatio to QB)

Object Name(s):

Date/Time Period:

Load Direction: QB to Creatio

Creatio to QB

QB Customers to Creatio Accounts Binding Request

Have your Creatio Account Records in your Creatio been bound to your Customer Records in QuickBooks?

Yes

No

Have you matched your Creatio Account Name in your Creatio to your Customer Name in your QuickBooks?

Yes

No

Is the Account Name in your Creatio to your Customer Name in your QuickBooks and exact match?

- Yes
- No

InterWeave Service Support

Please see our Support Process below. Please register for the Forum and create Tickets – Cases are auto-generated in our Creatio for your account – we can then prioritize and track. Your Service Request Form can be attached to you Case, and then we'll have all the information required to complete the request.

Support consists of three access points:

1. The **InterWeave Forum**
 - a. Tips and Tricks from **InterWeave** and our customers on common issues experienced with integration with QuickBooks, eCommerce, ERP and Credit Card processing, and
 - b. Desk.com Ticket Creation to track tickets created by you
 - i. Tickets created in Desk.com automatically create Cases in our Creatio in your Account record
 - ii. We can then track, update, prioritize, allocate and complete these tasks.
2. **InterWeave Help & Training Manuals**
 - a. For Creatio Customers - a comprehensive manual regarding your **InterWeave Solutions**
 - i. (Online - [http://www.interweave.biz/PDFs/InterWeave%20Smart%20Solutions%20Creatio QuickBooks%20Help%20and%20Training%20Guide.pdf](http://www.interweave.biz/PDFs/InterWeave%20Smart%20Solutions%20Creatio%20QuickBooks%20Help%20and%20Training%20Guide.pdf))
3. **InterWeave Direct**
 - a. email support@interweav.biz, or
 - b. telephone 416-800-9120 x3, and meet Alex Umanets, our Integration Support Manager/Business Analyst

To join the InterWeave Forum

We have been working hard on our Forum, which will provide very relevant information on tips, tricks and common outstanding questions. It's also where you can enter a ticket for us to track and resolve issues for customers. We are moving to a formal tracking system and documentation of issues/updates/fixes for our customers.

Please utilize this to enter any/all issues so I may have first-hand information on an issue and address it in a timely manner.

To register in the Forum, go to interweave.biz, top right – you will now see Forums. Please click on this which takes you to the Forum's page. Top left, login, brings you to Login Page.

Sign up is in the right-hand top corner. Follow the process and join the Forum. We're looking to log and manage all issues in an organized, timely manner.