Integration
T E C H N O L O G I E S

InterWeave **Smart** Solutions

The 7 Steps to Complete your Integration with Creatio_Sage Intacct

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The 7 Steps to Complete your Integration with Creatio_Sage Intacct with InterWeave Smart Solutions

Welcome to the 7 Steps to build your **Inter**Weave **Smart** Solution. We will be defining 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_Sage Intacct 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 – Sage Intacct Custom Field & Integration User Setup

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

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

Step 3 – 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 your Solution in 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 4 - Register in the **Inter**Weave **Case Management Solution**

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

Support consists of three access points:

1. The I**nter**Weave Forum
   a. Tips and Tricks from **Inter**Weave and our customers on common issues experienced with integration with Sage Intacct, Sage Cloud 100 and others.
   b. Freshdesk.com Ticket Creation to track tickets created by you
      i. Solutions : Integration Technologies, Inc. (freshdesk.com)
      ii. Tickets created in Freshdesk automatically create Cases in our CRM in your Account record
      iii. We can then track, update, prioritize, allocate and complete these tasks

2. **Inter**Weave Help & Training Manuals
   a. For Creatio Customers - a comprehensive manual regarding your **Inter**Weave Solutions
      i. (Coming Online 2022 – TBD)

3. **Inter**Weave Direct
    a. email support@interweav.biz, or
    b. telephone 800-671-8692 x3, and meet Alex Umanets, our Integration Support Manager/Business Analyst

Step 5 – Access to your Sage Intacct Account

Customer - To Do

- Before you start testing, you need to make sure your Sage Intacct is ready.
    - Check if Sage Intacct User ID/Password is working and you have access to your financials.

Step 6 – Activation of Flows and Testing

Inter Weave **Technical Specialist** – **To Do**

- Your **Inter**Weave Technical Specialist assist you with specifying Test Cases as relate 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 Sage Intacct Invoice, there is an assumption that you have already run the Creatio Product to Sage Intacct Product and Creatio Account to Sage Intacct Customer, since both are required in Sage Intacct to create an Invoice.

- Commence testing individual Utility Flows (Objects)

- Customer will need to create test Sage Intacct Product(s) to test Creatio Product(s) first so Product Line Products will be available to be selected under Creatio Opportunities.

- **Creatio to Sage Intacct Testing:**
    - Creatio Account to Sage Intacct Customer
    - Creatio Opportunity or Quote to Sage Intacct Invoice

- **Sage Intacct to Creatio Testing:**
    - Sage Intacct Customer to Creatio Account
    - Sage Intacct Invoice to Creatio Opportunity or Quote

Step 7 – 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 Sage Intacct customers
  - Create your Case for Binding using our Freshdesk.com Case Management Solution.
  - There will most likely be multiple runs as you correct your Creatio Account Names to match exactly your Sage Intacct 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 monitory your **Inter**Weave Solution.

Next Steps – Bulk Loading history from your Sage Intacct

InterWeave Technical Specialist – To Do

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