



InterWeave Smart Solutions

SALESFORCE SMART SOLUTION CHECKLIST

InterWeave Smart Solutions are designed to run and operate in a very efficient and streamlined manner. In order to begin the testing of your configured solution and maintain your desired project schedule, the installation and set-up of the required integration fields in Salesforce and QuickBooks will need to be performed. Please follow the categorized detailed steps below required to support your **Smart** Solution.

Smart Solution Set Up and Testing

Open your internet browser to the main customer portal login located at www.interweave.biz. Next, select "Login" on the main title bar. The Help & Training Manual located at <http://www.interweave.biz/PDFs/ISP%20Salesforce%20HelpandTraining.pdf> contains additional information detail for the categories below.

Step 1 – Create custom fields in Salesforce and Quickbooks

- Customize/update Salesforce with custom fields as identified in the H&T Manual
- Customize/update QuickBooks with custom fields as identified in the H&T Manual
- Make a test copy of your QuickBooks Company File—this is what you will test against.

Step 2 – Registration & Solution Configuration on the InterWeave Solutions Portal

- Select New Company? Please [Register Here](#)
- Enter your unique registration information (and remember it, save it – it is case sensitive)
- Select your Solution and walk through the Configuration with your **InterWeave** Technical Specialist

Step 3 – Connectivity Set Up

- If you are connecting to Quickbooks Online - see the first section in the H&T Manual
- If your connecting to your Quickbooks Company file on a server, see instructions in the H&T Manual
- Install connector, configure firewall
- Ensure QB connectivity with help of your **InterWeave** Technical Specialist
- Make sure you have received the so-called "QODBC URI" string from Support by this point (it looks like this - "jdbc:odbc:CompanyName")
- Login to edit your company profile (Edit Company Profile), verify that all your settings are properly filled in and on the last page of settings, put in the QODBC URI (in the correspondingly-named row)
- **Ensuring Connectivity for InterWeave Servers in Salesforce**
 - In Salesforce, Rackspace Servers running **InterWeave** need to be authorized. Go to Setup, Security Controls, Network Access, New - enter the IP addresses in the H&T Manual

Step 4– Activation of Flows and Testing

- Log into the **InterWeave** Solutions Portal
- If you selected Professional, Premier or Small Business, please go to the next page for Button activated flows. If you selected Enterprise, log in and commence testing individual Flows (the Utility Flows)

Step 5 – Binding and Production

- When your testing is complete, we will run the binding flows for SF to QB that evening
- Next morning, Log into the **InterWeave** Solutions Portal, set your Flow timings – and your running



Integration Solutions made Easy

InterWeave Smart Solutions

SMART SOLUTION CHECKLIST

InterWeave Smart Solutions are design to run to operate in a very efficient and streamlined manner. But first, installation and set-up of the required integration fields in Salesforce and Quickbooks, will allow testing of your configured Solution to proceed exactly to your schedule. Below, please see the categories and detail required to support you **Smart Solution**.

Smart Solution Set Up and Testing for Professional, Premier and Small Business Buttons

The main customer portal login is located at www.interweave.biz – select “Login” on the main title bar. The Help & Training Manual (<http://www.interweave.biz/PDFs/ISP%20Salesforce%20HelpandTraining.pdf>) has all the information for these models.