MRC Solutions Portal Help & Training Guide

MRC SugarCRM Solutions Portal

Help & Training Guide

by Integration Technologies, Inc.

Welcome to MRC's Help & Training Manual. This manual was designed to provide customers clear, consise document for Solution registration, configuration and instructions for the management and monitoring of Solutions.

MRC Solutions Portal Help & Training Guide

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Foreword

We look forward to your comments and cretique of this document. Please send all comments to document@interweave.biz

Section I

1 Introduction to the MRC SugarCRM Help & Training Guide for SugarCRM

Welcome to the award-winning **Inter**Weave, the on-demand service designed for you to manage your Integration Solutions that integrate with other systems and even build your own Solution.

The InterWeave service includes the following components:

InterWeave **Smart** Solutions

Smart Solutions includes pre-built integration Solutions between the "Best of Breed" applications in the market today ranging from CRM to Financial to ERP to Billing to eCommerce to Telephony to Customer Service, Data Base, Web Services, etc.

InterWeave **Smart** Solutions is SaaS

The **Inter**Weave **Smart** Solutions SaaS platform is the first Software as a Service (SaaS), enabling developers to create and deliver any kind of integrated business Solution, entirely on-demand and without software. The platform IDE includes easy-to-use, point-and-click customization tools to create solutions for your unique business requirements, without any programming experience.

The MRC SugarCRM solution(s) includes the following components:

SugarCRM Applications

SugarCRM includes pre-built applications for customer relationship management (CRM) ranging from sales force automation to partner relationship management, marketing, and customer service.

Sugar Exchange

The Sugar Exchange is an on-demand application-sharing service, featuring hundreds of applications, all created by SugarCRM.com customers, developers, and partners. Many of the applications are free and all of them are pre-integrated with SugarCRM, enabling you to easily and efficiently add functionality.

SugarCRM Community Services

SugarCRM.com also provides a suite of services, programs, and best practices that enable customers to take on-demand success to the next level. Learn more about the types of assistance available to help you be successful.

1.1 Using the SuigarCRM Help & Training Guide

All information in the online help applies to All Editions, unless otherwise noted.

MRC SugarCRM Smart Solutions **Help & Training Guide offers the resources you need to be successful. You can:**

- Find Answers to Your Questions
- Consult, Print, or Email Online Help Topics
- Download Tip Sheets and Best Practice Guides

- Review Documentation for Force.com Developers
- Take Free Training
- Contact Customer Support

Find Answers to Your Questions

Click Help & Training at the top of any page. Enter your keywords in the Search box and click Go!. The search returns online help topics, knowledge base solutions, and recommended training classes that match the keywords you entered.

Tips for searching within the Help & Training window:Consider these tips when searching:

- Search returns online help topics, knowledge base solutions, and recommended training classes that include all or any of your keywords. For example, searching for data loader may return results with just data, just loader, or both keywords in any order. Items that include more of your keywords are listed higher in results, and items that contain your keywords as a phrase or near each other are also listed higher.
- Use multiple keywords to narrow your search results. For example, create lead assignment rules returns more specific results than just assignment rules.
- Search is not case-sensitive. Mail Merge is the same as mail merge.
- Search finds variants of your keywords, for example, searching for creating finds items containing create, creation, or creating.
- Commonly used words such as the, about, and, and not are ignored.
- Search wildcards, such as * and ?, and operators, such as AND, OR, and AND NOT, are treated like any other keyword. For example, searching for outlook AND cases is treated exactly the same as outlook cases.

After you find the answer you need, you can click the Email Page link at the top of the window to send a URL for the help topic or knowledge base solution to yourself or anyone else.

Consult, Print, or Email Online Help Topics.

Click the Help for this Page link to open a context-sensitive online help topic describing that page. On any related list in Help & Training, click the Help link to open an online help topic describing that related list.

To print a PDF version of the online help, click the Help tab of the Help & Training window and click Printable User Guide in the taskbar.

To email the URL for any online help topic to another person, click the Email this Page link in the top right of the Help & Training window.

Download Tip Sheets and Best Practice Guides

Select the Help tab of the Help & Training window and click Tips & User Guides in the taskbar to view and download tip sheets, implementation guides, and best practices for specific features.

Visit www.interweave.com/community to browse and access more tips, best practices, and tools for success with **Inter**Weave.

Review Documentation for SugarCRM Developers

If you are building a Solution on **MRC SugarCRM Smart** Solutions platform, see Documentation Resources for **MRC SugarCRM Smart** Solutions Developers for more information.

Take Free Training

Select the Training tab of the Help & Training window, choose your role and geographic location, and click View Classes! to find free, online training classes to help you learn how to use **Smart** Solutions.

Contact Customer Support

Select the My Cases tab of the Help & Training window to access customer support options. Click Log a Case to submit your question or issue directly to **Inter**Weave Customer Support. Click View Cases to see your previously submitted cases.

To contact **Inter**Weave Customer Support directly, use the following numbers depending on your location:

* Americas: (800) 671-8692 x701
* Canada: (416) 242-7910
* EMEA: (800) 671-8692 x701
* APAC: (800) 671-8692 x701
* Japan: (800) 671-8692 x701

For more information about the most efficient ways to receive the customer support assistance you need, see the Contacting Customer Support tip sheet or email support@interweave.biz.

1.2 InterWeave Service, Product, Hybrid Models

Customers today are looking for Solutions that meet their specific requirements and provide them unlimited flexibility. At Integration Technologies, **Inter**Weave **Smart** Solutions provide our customers unlimited options in both. **Smart** Solutions offers the industries first and only: CRM, Financial, ERP, Billing, eCommerce, Telephony and Customer Service applications ready to integrate and configure in a “Self-Service SaaS” model. You configure your integration between the applications with 100’s of configurable options available per Solution.

InterWeave **Smart** Solutionss are available in three options.

I. **Smart** Solutions **-** Customers can use **Smart** Solutions SaaS, hosted model, paying an annual subscription fee for the use of the **Inter**Weave **Smart** Solutions they select.
II. **Smart** Solutions **On Site -** Customers can select to own and install own perpetual software license(s) and create and run **Smart** Solutions in their environment, or
III. **Smart** Solutions **Hybrid -** Customers can select option i, but utilize the **Inter**Weave IDE to develop, maintain and extend their Solutions. All options take advantage of the benefits realized with **Inter**Weave support and maintenance.

No matter what your Integration needs are, Integration Technologies has the solution for you. Visit our Solution Directory for a list of Solutions available in your vertical or call 800-671-8692 ext 701. Email is sales@interweave.biz.

1.3 Contact Information

Business Offices

Integration Technologies, Inc. serves our global clients from several North American locations. If you have any questions, or require additional information regarding our products, we would be pleased to answer them for you. We may be reached through our office locations and contact information provided below.

Corporate Headquarters

250 W. 57th Street
Suite 1316 (57th and Broadway)
New York, NY
Phone: (800) 671-8692 ext 701
Fax: (801) 439-3476
E-mail us: bmagown@interweave.biz

Regional Office: Northeast United States

24 Hill Top Avenue
Essex, CT, USA, 06426
Phone: (203) 274-5226
Fax: (801) 439-3476 ext 701
E-mail us: info@interweave.biz

Regional Office: Canada

2 Bloor Street West, Suite 700
Toronto M4W 3R1 Canada
Phone: (416) 242-7910
Fax: (801) 439-3476 ext 703
E-mail us: toronto@interweave.biz

General Contacts

General Information: info@interweave.biz
Sales: sales@interweave.biz
Partners: partners@interweave.biz
Support: support@interweave.biz
Website: webmaster@interweave.biz

Section II

2 Welcome to the MRC SugarCRM Solutions Portal

Welcome to MRC SugarCRM Smart Solutions®

Customers today are looking for Solutions that meet their specific requirements and provide them unlimited flexibility. At **MRC SugarCRM** Portal, **Smart** Solutions provide our customers unlimited options in both. **Smart** Solutions offers the industries first and only: CRM, Financial, ERP, eCommerce, Billing, Telephony, Customer Service applications ready to integrate and configure in a “Self-Service SaaS” model. You configure your integration between the applications with 100’s of configurable options available per Solution. With **Smart** Solutions, the Solution is the Difference:

- Complete, pre-built integration Solutions - between "Best of Breed" applications
- All processes, workflow logic, mapping is ready for you to configure - with a mouse and the web
- The Solution is completely Configurable by the customer with picklists, drop downs or custom fields
- Start-ups, SMB or Enterprise - select exactly the right configuration for you - modify any time
- Extensive portfolio of integration Solutions waiting for you to configure
- Complete outsource packages available - no software, no hardware, no developers, no overhead - just sign and go

MRC SugarCRM Smart Solutions, v2.5, has the additional benefit of the **Integration Manager** (**IM**), a separate application that works in combination with your Solution that is focused on managing your Scheduled Flows, the data moving between your "Best of Breed" applications and your connection status. The **IM** monitors your data and connections in real-time, with email alerts directly to you or your System Administrator.

Additionally, we continue to add more functionality to our **Smart** Solutions; the Payment Gateway (Credit Card and ACH processing, multiple merchants), the Database Gateway (any ODBC), CloudConnect® (integrates any application, process, gateway, protocol, partner in the world), FedEx integration and many more.

This chapter contains the following sections:

- **Smart** Solutions Configuration Guide
- **Smart** Solutions Set-up & Process Guide
- **Integration Manager** Process Guide
- Common Error Messages

2.1 Featured Solutions

Featured Smart Solutions (plus future Solutions)

Smart Solutions provide our customers with complete integration Solutions between "Best of Breed" applications at Object level, uni or bi-directionally. Whether you looking to integrate SugarCRM.com to QuickBooks, ACCPAC, MS Great Plains, Simply Accounting, Sage Line 50 and 200, MAS 90 and 200, or On-Demand Billing to eCommerce, ERP, Databases or Web Services - **MRC SugarCRM** has the configurable Solutions for you.

SugarCRM to Financial

- QuickBooks
- Sage ACCPAC
- MS Great Plains, Navision
- Simply Accounting
- Sage Line 50, 200
- MAS 90, 200
- Peachtree
- Oracle and many more

SugarCRM to ERP

- Scout Inventory Management

SugarCRM to Billing

- Aria On-Demand Billing

SugarCRM to eCommerce

- Nexternal
- Merkatis and many more

SugarCRM to Customer Service

- ZenDesk

SugarCRM to Telephony

- Contactual
- LDAP Native and many more

SugarCRM to eMail

- Google
- Microsoft Exchange
- Lotus Notes

Don't see it here? Contact sales@interweave.biz for your integration requirements. .

2.1.1 SugarCRM_Quickbooks

Smart Solution **Set Up and Testing**

The main customer portal login is located at www.interweave.biz – select **"Solutions"** on the main title bar and then select "**CRM**". This will bring you to the CRM landing Page. Scroll down and select "**Remote Integration Solutions**" under MRC - and you come to the MRC SugarCRM Portal . Your **Smart** Solutions Technical Specialist will work with you to execute the steps below:

Step 1 – Create custom fields in SugarCRM and Quickbooks

- Customize/update SugarCRM with madatory custom fields as identified below
- Customize/update SugarCRM with optional custom fields as identified below
- Customize/update QuickBooks with custom fields as identified below
- Make a test copy of your QuickBooks Company File

Step 2 – Connectivity Set Up

- If you are connecting to Quickbooks Online - see the first section instructions in Step 2
- If your connecting to your Quickbooks Company file on a server, see instructions below and in Step 3
- Install connector, configure firewall
- Ensure Quickbooks connectivity with help of Support
- 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 (EditCompanyProfile), 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)

Step 3 – Registration & Solution Configuration on the MRC SugarCRM Solutions Portal

- Select New Company? Please [Register Here]
- Enter your unique registration information (and remember it – it is case sensitive)
- Select your Solution and walk through the Configuration with your **Smart** Solutions Technical Specialist
    - This takes about 30 minutes or accept standard configuration out of the box

Step 4 – Activation of Flows and Testing

- Log into the **MRC SugarCRM** Solutions Portal
- Log in and commence testing individual Flows (objects)

    SugarCRM Object Testing:

    - Account to Customer
    - Quotes to Invoice
    - Product Catalog to Item

Step 5 – Binding and Production

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

2.1.1.1 Step 1 - Create custom fields in Sugar and Quickbooks

SugarCRM Custom Fields

Mandatory

At a minimum, we need three new custom fields for Accounts, one field for Opportunities and one field for Products to be added in SugarCRM. These help the bi-directional flows as well as speed up operations and ensure better linkage between SugarCRM objects and QuickBooks objects.

Account Record

Go to "**Admin**" in SugarCRM, then scroll down to "**Developer Tools**", then select "**Studio**", then select **Account**, then "**Fields**", then click on "**Add Field**".

The Data Type is "textfield", Field Name "**qb_full_name_c**", System Label is "**LBL_QB_FULL_NAME**", maximum length of the field is 210 characters, then "**Save**".

Click on the "**Add Field**" button again in the account fields list. This time, use the "Date" field type. The label for this field is "**qb_lastmodified_c** ", then "**Save**".

Click on the "**Add Field**" button again in the account list. This time, use the "DropDown", Field Name "**active_c**", System Label is "**LBL_ACTIVE**", then "Save".We always need a custom field with API name of “Active_c” – DropDown with two values “Yes” and “No”

Opportunity Record

Go to "**Admin**" in SugarCRM, then scroll down to "**Developer Tools**", then select "**Studio**", then **Opportunity**, then "**Fields**", then click on "**Add Field**".

The Data Type is "datetime", Field Name "**qb_last_update_stamp**", Display Label is "**QuickBooks Last Update**", System Label is "**LBL_QB_LAST_UPDATE_STAMP**",then "**Save**".

Quote Record

Go to "**Admin**" in SugarCRM, then scroll down to "**Developer Tools**", then select "**Studio**", then **Quote**, then "**Fields**", then click on "**Add Field**".

The Data Type is "datetime", Field Name "**qb_last_update_stamp**", Display Label is "**QuickBooks Last Update**", System Label is "**LBL_QB_LAST_UPDATE_STAMP**",then "**Save**".

Product Catalog Record

Go to "**Admin**" in SugarCRM, then scroll down to "**Developer Tools**", then select "**Studio**", then **Product Catalog**, then "**Fields**", then click on "**Add Field**".

The Data Type is "datetime", Field Name "**qb_last_update_stamp**", Display Label is "**QuickBooks Last Update**", System Label is "**LBL_QB_LAST_UPDATE_STAMP**",then "**Save**".

Additional Optional Fields relating to your Configuration Selections

In SugarCRM

1. **Contact Object**

   a. Click on the "**Add Field**" button again in the account list. This time, use the "DropDown", Field Name "**level_c**", System Label is "**LBL_LEVEL**", then "Save".We always need a custom field with API name of “Level_c” – DropDown with three values "Primary, Secondary, Tertiary"

2. **Account Object**

a. If you have selected the 30/60/90 option, you will need to create the following custom fields in the Account Object:

Data Type	Field Name	Display Label	System Label
Currency (9,2)	Curr Bal Pymts	Curr Bal Pymts	LBL_CURR_BAL_PYMTS
Currency (9,2)	Acc Recv Over30	Acc Recv Over30	LBL_ACC_RECY_OVER30
Currency (9,2)	Acc Recv Over60	Acc Recv Over60	LBL_ACC_RECY_OVER60
Currency (9,2)	Acc Recv Over90	Acc Recv Over90	LBL_ACC_RECY_OVER90

b. **We need the following fields to be accessible by integration user - this means they must be checked "Visable"** in the security setting. (below are field names, not labels): If your running SugarCRM Professional, you will need to go into Page Layout and drag the fields down to make them visible.

- Account Number
- Description
- Fax
- Employees
- Parent
- Phone
- Rating
- Type
- Website

3. Opportunity Object

a. If Transaction number is generated in SugarCRM, the custom field that stores the QuickBooks Transaction Number needs to be auto-numbered and unique

b. If your primary contact for an account is determined by contact lookup in account, we need a custom label of **“Primary Contact”** with a field name of **"Primray_Contact”** with the type *Lookup (Contact).*

c. If you are using custom billing and shipping address fields in your opportunities, we expect them to have the corresponding names:

- Billing Status
- Billing FirstName
- Billing LastName
- Billing Company Street
- Billing City
- Billing State

- Billing Postal Code
- Billing Country
- Billing PhoneNumber
- Shipping FirstName
- Shipping LastName
- Shipping Company Street
- Shipping City
- Shipping State
- Shipping Postal Code
- Shipping Country
- Shipping PhoneNumber

4. Ouote Object

a. If Transaction number is generated in SugarCRM,, the custom field that stores the QuickBooks Transaction Number needs to be auto-numbered and unique

b. If your primary contact for an account is determined by contact lookup in account, we need a custom label of **“Primary Contact”** with a field name of **"Primary_Contact”** with the type *Lookup (Contact).*

c. If you are using custom billing and shipping address fields in your opportunities, we expect them to have the corresponding names:

- Billing Status
- Billing FirstName
- Billing LastName
- Billing Company Street
- Billing City
- Billing State
- Billing Postal Code
- Billing Country
- Billing PhoneNumber
- Shipping FirstName
- Shipping LastName
- Shipping Company Street
- Shipping City
- Shipping State
- Shipping Postal Code
- Shipping Country
- Shipping PhoneNumber

5. Product Object

a. If you answered “**Yes**” on the setting “SugarCRM Support for Inventory items cost required” then you need to create two custom fields in the Product Object for Item Cost and Vendor. Their names should be:

- Unit Cost
- Vendor

b. If you answered "**Yes**" on the setting "SugarCRM Support for Item weight required" then you need to create custom field in the Product Object for Item Weight. The name should be:

- Weight

QuickBooks Custom Fields

1. **Customer Object**

   a. We always need a custom field named **"AccountID"**

2. **Vendor Object**

   a. We always need a custom field named **"AccountID"**

3. **Inventory Item Object**

   a. If binding between SugarCRM, products and QuickBooks inventory items is done based on product code/item SKU, we need a custom field named **"ItemCode"** to store the SKU

   b. If you answered "Yes" on the setting "SugarCRM Support for Item weight required" then we need a custom field named "Weight" to store weight

QuickBooks Copy

To create a copy of the Quickbooks Company file for testing, simply make sure that no one else is using the company file, and then make a plain file copy in Windows Explorer, naming that copy into something descriptive, like "Test.qbw", etc.

Additionally, we need the path (server) documented so we may put this address in your Configuration.

2.1.1.2 Step 2 - Connectivity Set Up for Quickbooks

Connecting with Quickbooks Online

If you are using Quickbooks Online, do not proceed to The Connector section. Go to http://www.qodbc.com/QODBConline.htm and select Ticket GUID. This will take you directly into QB Online where you will create your connection and upon completion, receive a key. Please email the key to us.

Connecting with your Quickbooks Company file on a server

Note: The full version of Quickbooks needs to be installed on the server we're going to be accessing.

The Connector

The connector is a very small piece of software that allows **Inter**Weave servers to connect to your

QuickBooks installation. It runs automatically when you login and stays in the background. Note that integration can only work when the Windows user you install this under is logged in.

1. Installation is to be done on the same machine that has the complete QuickBooks installation (client, server, DB manager, etc.).
2. Download ZIPped package from http://interweave.biz/downloads/IW_QBConnector.zip
3. Open the provided ZIP file package (shown as "compressed folder" in some versions of Windows).
4. Right-click on the "IW_QBConnector" folder and click "Copy"
5. Navigate to the "C:\Program Files" directory in Windows Explorer, right-click and click "Paste" (placing the above folder under "Program Files")
6. Navigate into the newly-created "IW_QBConnector" folder and double-click on "RunMe.reg" (may appear as simply "RunMe"); click "Yes" when prompted
7. Double-click on "connector.exe"; a white window may flash briefly, and a square tray icon with "IBiz QuickBooks" tooltip will appear

Note: If you have selected ITX Corp to install "Connection as a Service", please disregard above.

Most companies' servers are behind a so-called "firewall" or similar devices that block external access to improve security. For the Solution to connect, your firewall needs to allow inbound connections to your QuickBooks company file on port **2080**. Please make sure that this is the case (you may need to contact your hosting provider or IT support for that).

Once the access is allowed, please send the following pieces of information to support:

- your static IP address (you may need assistance of your IT contact for that)
- location of your company file(s) (including filename) on the computer (e.g. "C:\QBFiles\Company.qbw")
- location of your test company file copy (similar to above)

2.1.1.3 Step 3 - Sugar Registration & Solution Configuration

Register

The first step is to Register and Configure yourself and your company in the **MRC SugarCRM** Solutions Portal (RSP).

1. Go to the ISP home page, select *New Company? Please register here*
2. Enter your Company/Organization (exactly as you want it)
3. Enter your Administrator's E-Mail Address (this can be you also)
4. Enter Administrators First Name, Last Name, Password and Confirm Password
5. Select your Integration Solution (ex.SugarCRM to Quickbooks)

With the assistance of your **Smart** Solutions Specialist, select the Configuration Options that invoke the object/field configuration you want. During this Configuration step, you may create/define as many custom fields in SugarCRM as you wish – which correlate to Quickbooks fields – and enter then into your Configuration options.

Certain mandatory fields are required in SugarCRM and Quickbooks to make your Solution operates smoothly (**See Create custom fields in SugarCRM)**. Depending on your selections, certain optional fields are also mandatory fields required.

MRC SugarCRM Solutions Portal Profile

Some of the options you've specified for your Solution in the **MRC SugarCRM** Solutions Portal (RSP) configuration may require presence of specific custom fields in SugarCRM and QuickBooks. The following documents those requirements; it may be helpful to login and have your profile information on-screen.

> **Edit Company Profile** - You can review and change your company profile information in the RSP by clicking the "*Edit company profile*" link in the main login page. Enter the company name (exactly as it was specified in the initial setup), administrator email and the password. Then click "**Load Company Profile**". The rest can be navigated using the "**Next**" button. Click the "**Finish**" button on the very last page to commit configuration changes.
>
> Make sure that the configuration information is correct, as the flows will not work otherwise. Also, make sure that the SugarCRM login as well as the QODBC URI are specified (the latter should have been provided by support).

NOTE: if you have changed profile settings, you must log out and then log back in from the Transaction Flow Manager screen (use the log out link near the top of the page).

2.1.1.4 Step 4 - Activation of Sugar Flows and Testing

Receiving your Email

Upon completion of the step above, you will receive the following email from your **Smart** Support personnel.

1. Your **MRC SugarCRM** company name is: [Company Name Here]
2. Your company token is: [Token issued by **MRC SugarCRM** here]
3. The QODBC software driver installation (Remote Connector or Connector as a Service) step needs to be complete (see above or if not sure what it is or the status – ask)
4. You may need to add a few custom fields to your SugarCRM application and the QuickBooks company file. Use the guide above to make sure that your installation is correct; some of this has already been taken care of during the initial setup call.
    1. In some cases, a similar custom field may already exist, e.g. due to prior integration efforts; in that case, just modify existing field to match the expected API name.

Create an Administrative User

There can be multiple users per company profile in the **MRC SugarCRM** Solutions Portal (RSP). The administrator user is the user with the same email as the "administrator email" you have specified in the company profile.

Follow these steps to create it:

1. In the main login screen, click on the "*Register Here*" link right after "*New user?*" text
2. Most fields are self-explanatory; all need to be filled out
3. Copy the company name exactly as it is in the email (no spaces, etc.). Copy the Token into “QB Integration Password/Token” and confirm.
4. The e-mail is what is used to log in, and must be the same as the "administrator email" in the company profile
5. When done, click "*Register*"

Working with Flows

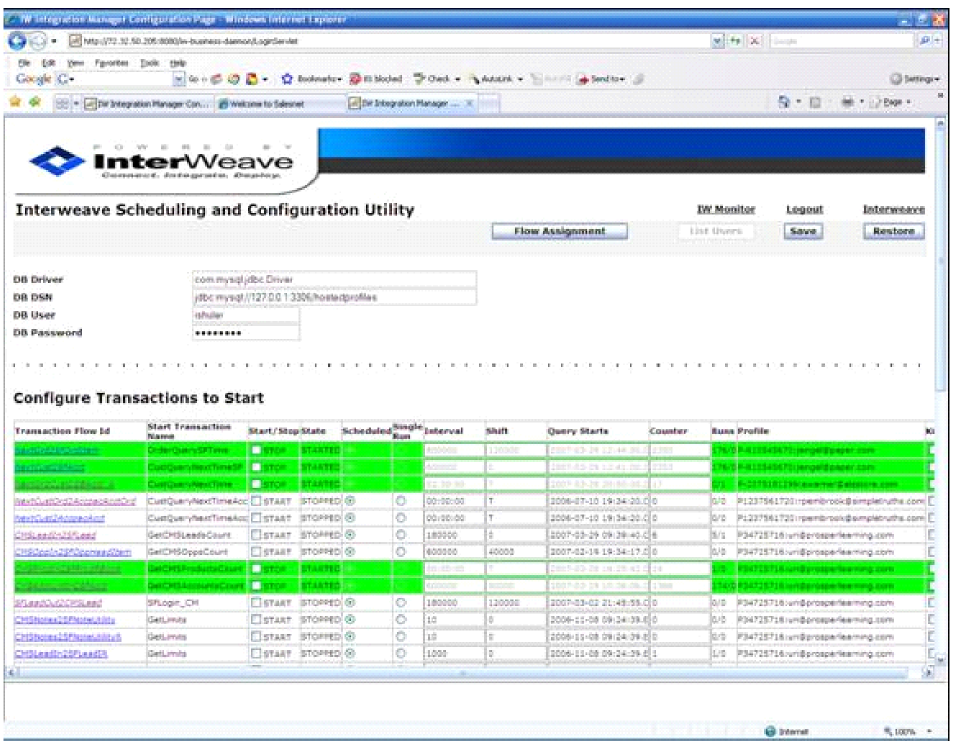
MRC SugarCRM works based on "Flows", which are batch jobs importing a subset of data from one system to another.

After having created the administrator user, use those credentials to login on the main Profile Login screen in the RSP. You should see a list of flows currently available, with a few checkboxes and other fields in each row.

Each flow can be configured by clicking on its name (which is a link). The bottom frame of the window should then show the available parameters for the flow.

To start a flow, check the checkbox on the same row as the flow name, and then click the "Submit" button at the bottom of the screen.

The row should be highlighted green. To keep checking the status of running flows, just click "Submit" when no checkboxes are selected - that is equivalent to refreshing the page.



SugarCRM Object Testing

SugarCRM objects (Accounts, Contacts, Quotes, Opportunities, Product Catelog, etc.) may now be tested one at a time; SugarCRM to Quickbooks, then QuickBooks to SugarCRM. All parameters need to be entered prior to starting the Flow.

Enterprise Model Testing

If you have the Enterprise Model, testing is done using special Single-Object Flows (or “Utility Flows”, which always end in letter "N". Each of these has a required parameter that specifies that single object by name. This is done to limit the potential damage done by mis-configured Flows. Please refer to **Inter** Weave Solutions Portal regarding details of specifying options to individual flows and running them.

Account Example

Sugar -> QB flow (SugAcct2QBCustN)

This Flow takes a new account in SugarCRM that would be expected to generate a QB customer (e.g. set the appropriate opportunity stage to "Closed-Won", etc). Plug in the name of that account into this flow's "AccountName" parameter and run it. This customer should appear in QuickBooks.

QB -> Sug flow (QBCust2SugAcctN)

Edit the QuickBooks customer created in the last flow - e.g. change the "Phone" field. Then plug in the name of that customer into this flow's "CustomerName" parameter and run it. The changes should be propagated back into SugarCRM.

Professional, Premier and Small Business Model Testing

If you have the Professional, Premier or Small Business Model, testing is done using the buttons you have created at the Object level (Accounts, Quotes, Product Catalog, etc.) and the Home Page Custom Links.

2.1.1.5 Step 5 - Binding and Production Flows for Sugar Enterprise

Binding and Production

Binding the objects in SugarCRM with the objects from Quickbooks provides a mechanism that will prevent duplication. For example, if you selected an Account custom field in SugarCRM to be bound to Quickbooks Customer ListID field, running the flow would bind these two objects and duplication – could not happen.

If you did not selection any fields to bind (ex. A one-way integration) - we will skip this step. To bind, just alert us you have finished your testing and we will bind your SugarCRM_Quickbooks Solution that evening.

Interweave Binding Fields

We need two new custom fields for Accounts and one field for Quotes, Opportunities and Products to be added in SugarCRM. If SugarCRM Contacts are used to create Quickbooks Customers or Vendors as a base SugarCRM object, two fields same as for Account must also be added to Contact object. They will help with bi-directional flows as well as speed up operations and ensure better linkage between SugarCRM objects and QuickBooks records.

Please go to "Setup" in SugarCRM, then on the left side-bar click on "Customize", then on "Account", then on "Fields" links. Scroll down to see the list of existing custom fields, and click on the "New" button above that list. The field type is "Text", label is "QB Full Name" (the name would be automatically filled in as "QB_Full_Name"), maximum length of the field is 210 characters. Continue clicking "Next" and then "Save". Repeat same procedure for Contact object if required (see above).

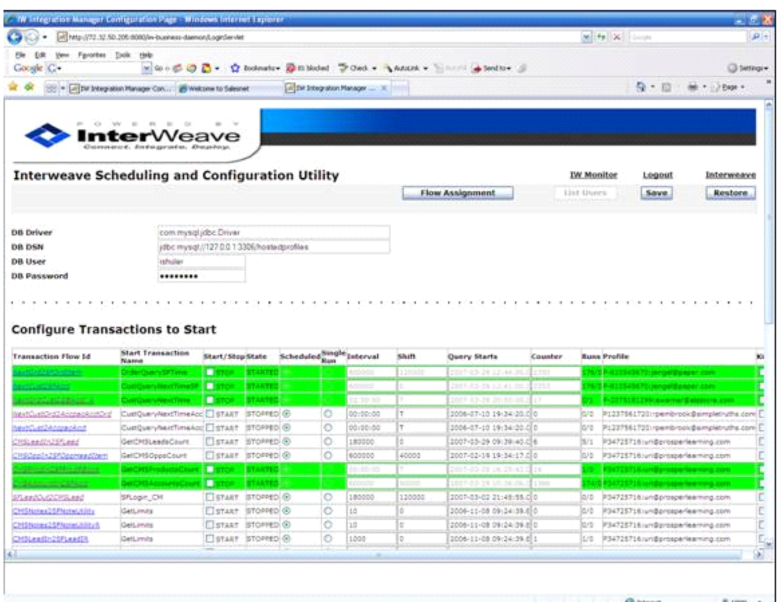
Click on the "New" button again in the account custom fields list. This time, use the "Date/Time" field type. The label for this field is "QB LastModified". Continue clicking "Next" and then "Save".

On the left side-bar click on "Product", and then on "Fields". Scroll down to the list of existing custom fields and click on the "New" button. The field type is "Date/Time" and label is "QB LastModified". Continue clicking "Next" and then "Save".

The next day when you Log In you will be presented Scheduled Flows, where you set the scheduled intervals you want your flows to be firing on. Set you timings, start the Flows, you’re done. Your data is now moving back and forth automatically.

The Integration Manager Console

The Integration Manager Console



The customer-friendly console that allows customers to manage the transactions that compose their integration solution.

- Solutions are composed of scheduled run-time and utility transactions
  - The customer sets the timing intervals according to preference: ex. Accounts, every 3 minutes
  - Set it and forget it
- Transactions are shown based on your log-in profile
- Full detail of transaction flow dynamically shown
- Supported by on-demand error-reporting function
- **New features coming include:**
- Automatic Restart of Flows
- Thread Status
- Better Status Reporting
  - Connection status
  - % complete
  - Flow start & stop
  - Total Records
  - End of Day Summaries

2.1.1.6 Professional, Premier and Small Business Buttons and Links_2

The **MRC SugarCRM**_Quickbooks **Smart** Solutions is available in four models;

- Professional
- Premier
- Small Business, and
- Enterprise.

Objects are eligible for configuration are available depending on model selected.

See descriptions below.

2.1.1.6.1 Professional, Premier and Small Business Buttons on Sugar

The Professional, Premier and Small Business Models use custom links and buttons that you create

- In SugarCRM on the Home Page or Object Pages (Accounts, Quotes, Opportunities, Products) for the SugarCRM to Quickbooks Flows
- Custom Links on the Home Page or Custom Button on the Accounts, Quotes, Opportunities and Products Pages
- These links activate your configured Object Flows in **Inter**Weave

Detail will be documented here upon selection of how **MRC SugarCRM** will process custom buttons

.

2.1.1.7 Connection Issues with SugarCRM and Quickbooks

Additional Notes

1. **SugarCRM Dedicated License for Integration**

   a. When configuring your Solution in the **MRC SugarCRM** Solutions Portal, the last page is where you enter your SugarCRM User ID and Password and your Quickbooks User ID and Password.

      i. Regarding SugarCRM, we typically use a lightly used SugarCRM license for the integration license – but, if all are actively used – purchase a separate SugarCRM license and dedicate it to integration.

2. **SugarCRM change of Password**

   QB passwords are not used by us so you can change it any time. If you want to change SugarCRM password then please:

   a. Stop the Flows.
   b. Change password in SugarCRM.
   c. Open company configuration and at the last page of the wizard change SugarCRM password correspondingly.
   d. Re-start your Flows.

3. **Customer Logins in the RSP**
   a. There can be two logins (administration if treated separately)
      i. 1 will be for normal logging in to flows

ii. 1 will be to edit and change company profile
iii. Be sure to document both.

4. **Quickbooks SDK**
   a. Quickbooks may come with the Sometimes (actually often enough) Quickbooks is installed with the original version of SDK that may be several years older then the current one. You may try to use Quickbooks update feature for this or contact Intuit support – they will assist you with this.
5. **Quickbooks Dialogue Boxes and Pop Ups**
   a. Turn off any/all Quickbooks Dialogue Boxes or Pop Ups – this will disrupt your connection outbound and you will not receive any data.
6. **Quickbooks Server Environment**
   a. In our experience Quickbooks on Windows server 2003 is the most stable and reliable configuration.
7. **Your Microsoft Environment and Quickbooks Connection Failures**

   These are possible reasons for Quickbooks connection failure

   - Networking changes (external IP address, internal IP address of Quickbooks server, Router changes (Port forwarding etc.)). .
   - Quickbooks is locked by some pop-up (registration request, upgrade request, backup request, sometimes reminder etc.)
   - Quickbooks is locked by some operation that requires exclusive access to a company file (on-line banking, back-up etc.)
   - Quickbooks is locked by some other integration application operation that requires exclusive access to a company file.
   - Quickbooks is running in single-user mode or under the same user that used for integration
   - Connector is not running
   - More then one connector is running
   - Windows registry changes that affected connector settings
   - Company file moved to other location.
   - Company file configuration changed (some other application was registered, our permission to start Quickbooks were voided etc.); could also be possible as a result of restoration from back-up
   - Other (Windows) issues:
   - Windows can update and reboot but nobody is logged in so connector is not running. ITX "auto-user" approach fixes this but other Windows problems can lock the server

Section III

3 MRC SugarCRM Solutions Portal Configuration Guide

Smart Solutions Object definitions are below.

3.1 Sugar_Quickbooks Configuration Details

MRC SugarCRM Smart Solutions Portal

SugarCRM_Quickbooks - Configuration Guide Definitions.

The **MRC SugarCRM Smart** Solutions detail below relates to the **Sugar_Quickbooks** Solution, organized at the Object level. An "Object" in Sugar would be an Account, Contact, Opportunity, Product, etc. An Object in Quickbooks would be a Customer, Invoice, Sales Order, Item, etc. The detail below provides the field level definition for fields in those objects.

3.1.1 Object Selection

Smart Solutions **– Object Selection**

Property Name	Property Value	Entry Description	Notes
Sugar Account/Contact to QB Customer/Job	None Sugar_QB Uni-directional QB_Sugar Uni-directional Bi-directional	Select from pull-down menu the direction you wish to provide the objects integration. Uni, bi-directional or none.	Primary Object selection to create flows from Sugar that integrates with their QB counterpart. This entry is for the standard, B2B Sugar data structure offering from SaleSugarorce.com.
Sugar Account/Contact to QB Vendor	None Sugar_QB Uni-directional QB_Sugar Uni-directional Bi-directional	Select from pull-down menu the direction you wish to provide the objects integration. Uni, bi-directional or none.	Primary Object selection to create flows from Sugar that integrates with their QB counterpart. This entry is selected if you use Sugar Accounts additionally for Vendors.
Sugar Opportunity to QB Job	None Sugar_QB Uni-directional QB_Sugar Uni-directional Bi-directional	Select from pull-down menu the direction you wish to provide the objects integration. Uni, bi-directional or none.	Primary Object selection to create flows from Sugar that integrates with their QB counterpart. This entry is selected if you utilizing Jobs in QB.

Sugar Quotes to QB Sales Order	None Sugar_QB Uni-directional QB_Sugar Uni-directional Bi-directional	Select from pull-down menu the direction you wish to provide the objects integration. Uni, bi-directional or none.	Primary Object selection to create flows from Sugar that integrates with their QB counterpart. This entry is selected if you utilizing Sales Orders in QB.
Sugar Quotes to QB Purchase Order	None Sugar_QB Uni-directional QB_Sugar Uni-directional Bi-directional	Select from pull-down menu the direction you wish to provide the objects integration. Uni, bi-directional or none.	Primary Object selection to create flows from Sugar that integrates with their QB counterpart. This entry is selected if you utilizing Purchase Orders in QB.
Sugar Quotes to QB Invoice	None Sugar_QB Uni-directional QB_Sugar Uni-directional Bi-directional	Select from pull-down menu the direction you wish to provide the objects integration. Uni, bi-directional or none.	Primary Object selection to create flows from Sugar that integrates with their QB counterpart. This entry is selected if you utilizing Invoices in QB.
Sugar Quotes to QB Sales Receipt	None Sugar_QB Uni-directional QB_Sugar Uni-directional Bi-directional	Select from pull-down menu the direction you wish to provide the objects integration. Uni, bi-directional or none.	Primary Object selection to create flows from Sugar that integrates with their QB counterpart. This entry is selected if you utilizing Sales Receipts in QB.
Sugar Quotes to QB Estimate	None Sugar_QB Uni-directional QB_Sugar Uni-directional Bi-directional	Select from pull-down menu the direction you wish to provide the objects integration. Uni, bi-directional or none.	Primary Object selection to create flows from Sugar that integrates with their QB counterpart. This entry is selected if you utilizing Estimates in QB.
Sugar Quotes to QB Bill	None Sugar_QB Uni-directional QB_Sugar Uni-directional Bi-directional	Select from pull-down menu the direction you wish to provide the objects integration. Uni, bi-directional or none.	Primary Object selection to create flows from Sugar that integrates with their QB counterpart. This entry is selected if you utilizing Bills in

			QB.
Sugar Quotes to QB Check	None Sugar_QB Uni-directional QB_Sugar Uni-directional Bi-directional	Select from pull-down menu the direction you wish to provide the objects integration. Uni, bi-directional or none.	Primary Object selection to create flows from Sugar that integrates with their QB counterpart. This entry is selected if you utilizing Checks in QB.
Sugar Product to QB Item	None Sugar_QB Uni-directional QB_Sugar Uni-directional Bi-directional	Select from pull-down menu the direction you wish to provide the objects integration. Uni, bi-directional or none.	Primary Object selection to create flows from Sugar that integrates with their QB counterpart. Products are utilized as Opportunity line item detail – that builds the QB item detail on an Invoice, Sales Order, etc. If you do not use Products, there is a selection later for building a “dummy line item detail” in QB.

3.1.2 SUG Account to QB Customer

Smart Solutions **– Sugar Account/Contact to QB Customer**

Property Name	Property Value	Entry Description	Notes
Binding Sugar Custom Field with QB ListID		For each Solution, we bind primary/ secondary keys in each application to each other.	Sign-in to your SaleSugarorce account, choose Setup at the top, select App Setup on the left, select Accounts, then Fields. Choose Account Name and copy/ past the API field name into Property Value. Sugar Accounts will now be bound to QB List ID.

Binding criteria (optional)	None Name Name/Phone Name/Address(no street) Name/Phone/ Address(no street)	If you do not want to bind QB List ID with a Sugar Custom Field, other options are available to you via the pull-down menu.	
Binding Sugar Custom Field with QB Full Name		If you do not want to bind QB List ID with a Sugar Custom Field or the Optional Binding criteria above, you may create/ select your own field to bind with QB Full Name.	
Normalize Names for binding	No Yes value		
Sugar Field with QB Customer Name		You may create/ select a custom Sugar Field that you want to sync with QB Customer Name.	
Primary contact selected via	None Account/Contact Role Contact Level Custom Field Contact Lookup in Account Other	If you use the Primary Contact option in Sugar, use may choose to reflect this in QB Customers with the following pull-down menu.	Establishing Primary Contacts in Sugar at the Account Level is an Sugar Data Structure decision. Contact your Sugar Data Administrator to discuss this option.
Default Primary Role Name		??????	
Synchronize Contact Mail Address and Account Billing Address	No For Primary Contact For All Contacts	Select from pull-down menu if you wish to synchronize Sugar Contact Mail address with QB Account Billing Address (or Primary or All Contacts)	If you wish Contact Mail Address to be synchronized with Account Billing Address.
Propagate Sugar Hierarchy to QB Customer/Job Hierarchy	No Yes value Yes, using Custom Object	Select from pull-down menu if you wish to propagate the Sugar Hierarchy to the QB Customer (Jobs are	Sugar Hierarchy in Sugar at the Account Level is an Sugar Data Structure decision. Contact

		required/included) Hierarchy.	your Sugar Data Administrator to discuss this option. The corollary to Sugar Hierarchy is QB Customer/Jobs Hierarchy.
Hierarchy Level to create QB Job		Number of Hierarchy levels your looking to create in QB	
Sugar Custom Object Name to create QB Job		Sugar Custom Object corollary to QB Job	
Sugar Custom field for Customer Terms		You may create/ select a custom Sugar Field that you want to sync with QB Customer Terms.	Sugar Custom fields are fields that you can define and then integrate with a QB selected field. Take care to understand the formatting of the newly created Sugar Custom field matches the selected QB field.
Sugar Account Custom field for Total Balance		You may create/ select a custom Sugar Field that you want to sync with QB Total Balance.	
Sugar Contact Custom field for Middle Name		You may create/ select a custom Sugar Field that you want to sync with QB Middle Name.	
Permitted sync operations from Sugar Accounts to QB Customers	None Create and Update Create Only Update Only	Select from pull-down menu synchronization options from Sugar Accounts to QB Customers.	Depending if you're initializing either Sugar or QB, or just one of them is new – you may decide on these functions. Ex. If QB Customers are already there, and you don't want them over-ridden by Sugar Accounts, you would select "Update Only".
Create new QB Customer	Sugar Account	Select from pull-down	

when	created Sugar Opportunity is in certain stage Sugar Account Custom field has certain value Sugar Opportunity Custom field has certain value Sugar Opportunity is Won Sugar Account or Opportunity created Other	menu to create new QB Customer at the Account or Opportunity level. If you select a Sugar custom field, you need to create it in either Sugar Accounts or Sugar Opportunities.	
Sugar Opportunity Stage to create new QB Customer		Sugar Custom field Opportunity Stage created/required to synchronize with the selection of "Create new QB Customer when".	The defined stage to create a new customer in QB. Ex. "Closed Won".
Sugar Custom Field Name to create new QB Customer		Sugar Custom field Name created/ required to synchronize with the selection of "Create new QB Customer when".	If you selected the above "Sugar Opportunity Stage to create new QB Customer" you would not use this field.
Sugar Custom Field Value to create new QB Customer		Sugar Custom field Value created/ required to synchronize with the selection of "Create new QB Customer when".	If you selected the above "Sugar Opportunity Stage to create new QB Customer" you would not use this field.
Merge new Sugar Accounts with existing QB Customers	Do not merge Name/Phone/ Address(no street) Name/Phone Name/Address(no street) Name Other	Select from pull-down menu to merge new Sugar Accounts with existing QB Customers based on the following selections at the Account level.	The Merge feature allows you merge existing Sugar Accounts with existing QB Customers that are selected on the parameters.
Fill QB Customer Billing Street Address with	As Sugar Account Name/Address	Select from pull-down menu to fill QB Customers Billing	Sugar Account format selection to populate QB Customer Billing

	First Name+Last Name/Name/ Address First Name+Last Name/Address Other	Street Address with selections at the Account level.	Address.
Fill QB Customer Shipping Street Address with	As Sugar Account Name/Address First Name+Last Name/Name/ Address First Name+Last Name/Address Other	Select from pull-down menu to fill QB Customers Shipping Street Address with selections at the Account level.	Sugar Account format selection to populate QB Customer Shipping Address.
Permitted sync operations from QB Customers to Sugar Accounts	None Create and Update Create Only Update Only	Select from pull-down menu the synchronization operation you want performed from QB Customers to Sugar Accounts.	The opposite the Sugar to QB sync above. Depending if you're initializing either Sugar or QB, or just one of them is new – you may decide on these functions. Ex. If Sugar Accounts are already there, and you don't want them over-ridden by QB Customers, you would select "Update Only".
Create/Update Sugar Account when	QB Customer created/modified QB Customer field has certain value Other	Select from pull-down menu the operation you want performed to create/update the Sugar Account when.	
QB Field Name to create/ update Sugar Account		If QB "Customer Field has certain value" was selected above, enter the QB Field Name.	
QB Field Value to create/ update Sugar Account		If QB "Customer Field has certain value" was selected above, enter the QB Field Value.	Format is:

Merge new QB Customers with existing Sugar Accounts	Do not merge Name/Phone/ Address(no street) Name/Phone Name/Address(no street) Name Other	Select from pull-down menu the operation you want performed to Merge new QB Customers with existing Sugar Accounts.	The Merge feature allows you merge existing QB Customers with existing Sugar Accounts that are selected on the parameters.
Create Sugar Contact Records	No Yes	Create a SaleSugarorce Contact Record.	
Synchronize QB Account Number to Sugar	No Yes		
30/60/90 terms support required	No Yes	Select from pull-down menu the operation you want performed - rolling totals of AR outstanding for 30/60/90.	see Sugar custom fields required to support this configuration - there are 3 of them.
Use QB Full Name to merge	No Yes	Select from pull-down menu the operation you want to use the QB Full Name to merge.	
Sugar Account Owner to QB Sales Rep mapping required	No Yes	Select from pull-down menu the operation you want performed map QB Sales Rep structure to Sugar Account Owner.	
Sugar Account field to QB Customer field custom mapping 1		Customer mapping field entries for any to any mapping – delineate groups with a semi-colon.	Format is:
Sugar Account field to QB Customer field custom mapping 2 (more mappings)		Customer mapping field entries for any to any mapping – delineate groups with a semi-colon	Format is: up to 10 additional fields may be mapped here.
Credit Card Info Synchronization required	No Yes	Select from pull-down menu the operation you want performed to synchronize Sugar	

		CC information with QB CC information.	
Primary Sugar Contact Synchronization to QB Customer Contact Area required	No Yes	Select from pull-down menu the operation you want performed to synchronize Sugar Account Primary Contact to QB Customer Contact.	If you have selected the “Primary Contacts” above, you can additionally choose synchronization with QB Customer Contacts.

3.1.3 SUG Account to QB Vendor

Smart Solutions **– SF Account/Contact to QB Vendor**

Property Name	Property Value	Entry Description	Notes
Binding Sugar Custom Field with QB ListID		For each Solution, we bind primary/ secondary keys in each application to each other.	Sign-in to your SaleSugarorce account, choose Setup at the top, select App Setup on the left, select Accounts, then Fields. Choose Account Name and copy/ past the API field name into Property Value. Sugar Accounts will now be bound to QB List ID.
Binding criteria (optional)	None Name Name/Phone Name/Address(no street) Name/Phone/ Address(no street)	If you do not want to bind QB List ID with a Sugar Custom Field, other options are available to you via the pull-down menu.	
Binding Sugar Custom Field with QB Full Name		If you do not want to bind QB List ID with a Sugar Custom Field or the Optional Binding criteria above, you may create/ select your own field to bind with QB Full	

		Name.	
Normalize Names for binding	No Yes value		
Sugar Field with QB Vendor Name		You may create/ select a custom Sugar Field that you want to sync with QB Vendor Name.	
Primary contact selected via	None Account/Contact Role Contact Level Custom Field Contact Lookup in Account Other	If you use the Primary Contact option in Sugar, use may choose to reflect this in QB Customers with the following pull-down menu.	Establishing Primary Contacts in Sugar at the Account Level is an Sugar Data Structure decision. Contact your Sugar Data Administrator to discuss this option.
Default Primary Role Name		??????	
Synchronize Contact Mail Address and Account Billing Address	No For Primary Contact For All Contacts	Select from pull-down menu if you wish to synchronize Sugar Contact Mail address with QB Account Billing Address (or Primary or All Contacts)	If you wish Contact Mail Address to be synchronized with Account Billing Address.
Sugar Custom field for Vendor Terms		You may create/ select a custom Sugar Field that you want to sync with QB Vendor Terms.	Sugar Custom fields are fields that you can define and then integrate with a QB selected field. Take care to understand the formatting of the newly created Sugar Custom field matches the selected QB field.
Sugar Account Custom field for Total Balance		You may create/ select a custom Sugar Field that you want to sync with QB Total Balance.	
Sugar Contact Custom field for Middle Name		You may create/ select a custom Sugar Field that you want to sync with QB	

		Middle Name.	
Permitted sync operations from Sugar Accounts to QB Vendors	None Create and Update Create Only Update Only	Select from pull-down menu synchronization options from Sugar Accounts to QB Vendors.	Depending if you're initializing either Sugar or QB, or just one of them is new – you may decide on these functions. Ex. If QB Customers are already there, and you don't want them over-ridden by Sugar Accounts, you would select "Update Only".
Create new QB Vendor when	Sugar Account created Sugar Opportunity is in certain stage Sugar Account Custom field has certain value Sugar Opportunity Custom field has certain value Sugar Opportunity is Won Sugar Account or Opportunity created Other	Select from pull-down menu to create new QB Customer at the Account or Opportunity level. If you select a Sugar custom field, you need to create it in either Sugar Accounts or Sugar Opportunities.	
Sugar Opportunity Stage to create new QB Vendor		Sugar Custom field Opportunity Stage created/required to synchronize with the selection of "Create new QB Vendor when".	The defined stage to create a new customer in QB. Ex. "Closed Won".
Sugar Custom Field Name to create new QB Vendor		Sugar Custom field Name created/ required to synchronize with the selection of "Create new QB Vendor when".	If you selected the above "Sugar Opportunity Stage to create new QB Customer" you would not use this field.
Sugar Custom Field Value to create new QB Customer		Sugar Custom field Value created/ required to synchronize with the selection of "Create	If you selected the above "Sugar Opportunity Stage to create new QB Customer" you would

		new QB Customer when".	not use this field.
Merge new Sugar Accounts with existing QB Vendor	Do not merge Name/Phone/Address(no street) Name/Phone Name/Address(no street) Name Other	Select from pull-down menu to merge new Sugar Accounts with existing QB Vendors based on the following selections at the Account level.	The Merge feature allows you merge existing Sugar Accounts with existing QB Vendors that are selected on the parameters.
Fill QB Vendor Street Address with	As Sugar Account Name/Address First Name+Last Name/Name/Address First Name+Last Name/Address Other	Select from pull-down menu to fill QB Vendors Street Address with selections at the Account level.	Sugar Account format selection to populate QB Vendors Street Address.
Permitted sync operations from QB Vendors to Sugar Accounts	None Create and Update Create Only Update Only	Select from pull-down menu the synchronization operation you want performed from QB Vendors to Sugar Accounts.	The opposite the Sugar to QB sync above. Depending if you're initializing either Sugar or QB, or just one of them is new – you may decide on these functions. Ex. If Sugar Accounts are already there, and you don't want them over-ridden by QB Customers, you would select "Update Only".
Create/Update Sugar Account/Contact when	QB Vendor created/modified QB Vendor field has certain value Other	Select from pull-down menu the operation you want performed to create/update the Sugar Account when.	
QB Field Name to create/update Sugar Account		If QB "Customer Field has certain value" was selected above, enter the QB Field Name.	

QB Field Value to create/ update Sugar Account		If QB "Customer Field has certain value" was selected above, enter the QB Field Value.	Format is:
Merge new QB Vendors with existing Sugar Accounts	Do not merge Name/Phone/ Address(no street) Name/Phone Name/Address(no street) Name Other	Select from pull-down menu the operation you want performed to Merge new QB Vendors with existing Sugar Accounts.	The Merge feature allows you merge existing QB Vendors with existing Sugar Accounts that are selected on the parameters.
Create Sugar Contact Records	No Yes	Create a SaleSugarorce Contact Record.	
Sugar Account field to QB Vendor custom mapping 1		Customer mapping field entries for any to any mapping – delineate groups with a semi-colon.	Format is:
Sugar Account field to QB Vendor custom mapping 2 (more mappings)		Customer mapping field entries for any to any mapping – delineate groups with a semi-colon	Format is: up to 10 additional fields may be mapped here.
Sugar Account/Contact Field to select Customer or Vendor		new fields	
Sugar Account/Contact Field Value(s) to select Customer		new fields	
Sugar Account/Contact Field Value(s) to select Vendor		new fields	

3.1.4 SUG Opportunity to QB Job

Smart Solutions **– Sugar Quote to QB Job**

Property Name	Property Value	Entry Description	Notes
Binding Sugar Custom Field with QB ListID		For each Solution, we bind primary/ secondary keys in each application to each other.	Sign-in to your SaleSugarorce account, choose Setup at the top, select App Setup

			on the left, select Quotes, then Fields. Choose Quote Name and copy/ past the API field name into Property Value. Sugar Accounts will now be bound to QB List ID.
Binding criteria (optional)	None Name Name/Phone Name/Address(no street) Name/Phone/ Address(no street)	If you do not want to bind QB List ID with a Sugar Custom Field, other options are available to you via the pull-down menu.	
Sugar Opportunity Field with QB Job Name		You may create/ select a custom Sugar Opportunity Field that you want to sync with QB Job Name.	
Sugar Opportunity Custom field for Current Balance		The Sugar Opportunity Field that you want to sync with QB Current Balance	
Permitted sync operations from Sugar Quote to QB Jobs	None Create and Update Create Only Update Only	Select from pull-down menu synchronization options from Sugar Opportunity to QB Jobs.	Depending if you're initializing either Sugar or QB, or just one of them is new – you may decide on these functions. Ex. If QB Jobs are already there, and you don't want them over-ridden by Sugar Opportunities , you would select "Update Only".
Populate Sugar Billing Address to QB Job from	Do not populate Account Billing Address Opportunity Billing Address (custom field) Opportunity Billing	Select from pull-down menu the operation you want performed to populate the Billing Address from the Account or	

	Address (custom field with name) Opportunity Billing Address (custom field - all) Primary Contact Mailing Address	Opportunity Billing Address to the QB Job.	
Populate Shipping Address to QB Job from	Do not populate Account Shipping Address Opportunity Shipping Address (custom field) Opportunity Shipping Address (custom field with name) Opportunity Shipping Address (custom field - all) Primary Contact Mailing Address	Select from pull-down menu the operation you want performed to populate the Shipping Address from the Account or Opportunity Billing Address to the QB Job.	
Fill QB Job Billing Street Address with	As Sugar Source Name/Address First Name+Last Name/Name/ Address First Name+Last Name/Address Other	Select from pull-down menu the operation you want performed to populate the QB Billing Street Address.	
Fill QB Job Shipping Street Address with	As Sugar Source Name/Address First Name+Last Name/Name/ Address First Name+Last Name/Address Other	Select from pull-down menu the operation you want performed to populate the QB Shipping Street Address.	
QB Job Initial Status	None Pending Awarded In Progress Closed Not Awarded	Select from pull-down menu the status you want initially filled in – in the QB Job.	
Sugar Opportunity Field with QB Job Start Date		Sugar Custom field Name created/ required to synchronize with QB Job Start Date.	

Sugar Opportunity Field with QB Job Projected End Date		Sugar Custom field Name created/ required to synchronize with QB Job Projected End Date.	
Sugar Opportunity Field with QB Job Type		Sugar Custom field Name created/ required to synchronize with QB Job Type.	
Sugar Opportunity Field with QB Job Description		Sugar Custom field Name created/ required to synchronize with QB Job Description.	
Sugar Opportunity field to QB Job field custom mapping 1		Sugar Custom field Name created/ required to synchronize with QB Job Custom Field.	Custom fields allow you to enter a string of “from/to” fields delineated by a semi-colon “:” and then those filed combinations by a comma “,”. Format: up to 10 additional lines
Sugar Opportunity field to QB Job field custom mapping 2 (more mappings)		Sugar Custom field Name created/ required to synchronize with QB Job Custom Field.	Custom fields allow you to enter a string of “from/to” fields delineated by a semi-colon “:” and then those filed combinations by a comma “,”.
Permitted sync operations from QB Jobs to Sugar Quotes	None Create and Update Create Only Update Only	Select from pull-down menu the synchronization operation you want performed from QB Jobs to Sugar Quotes.	
Support for multiple identical line items required	No Yes	Select “Yes” if you want support for multiple identical items in QB.	Customers may choose to have multiple identical line items – for various reasons.

3.1.5 SUG Quote to QB Sales Order

Smart Solutions – **Sugar Opportunity to QB Sales Order**

Property Name	Property Value	Entry Description	Notes
Sugar Quote Custom field with QB Sales Order #		For each Solution, we bind primary/secondary keys in each application to each other.	Sign-in to your SugarCRM account, choose Setup at the top, select App Setup on the left, select Quotes, then Fields. Choose Quote Name and copy/ past the API field name into Property Value. Sugar Accounts will now be bound to QB Sales Order.
QB Sales Order # is generated by	Sugar QB	Select Sugar or QB to determine which application will generate the QB Sales Order #.	If you select QB, then any Sales Orders input by Accounting Opps will update Sugar (if you have chosen bi-directional at Object level).
Permitted sync operations from Sugar Quotes to QB Sales Orders	None Create and Update Create Only Update Only	Select from pull-down menu the synchronization operation you want performed from Sugar Opportunities to QB Sales Orders.	Depending if you're initializing either Sugar or QB, or just one of them is new – you may decide on these functions. Ex. If QB Sales Orders are already there, and you don't want them over-ridden by Sugar Quotes, you would select "Update
Create new QB Sales Order when	When Sugar Quote created Sugar Quote is in certain stage Sugar Quote Custom field has certain value Sugar Quote is Won	Select from pull-down menu the operation you want performed to create a new QB Sales Order. If you select a Sugar Quote custom field, you need to create it with Sugar Quotes.	

	Other		
Sugar Quotes Stage to create new QB Sales Order		The stage "value" that will trigger the creation of the new QB Sales Order.	Select from the Account of Quote level.
Sugar Custom Field Name to create new QB Sales Order		If QB "Create new QB Sales Order when" was selected above, enter/ create the Sugar Custom Field Name.	
Sugar Custom Field Value to create new QB Sales Order		If QB "Create new QB Sales Order when" was selected above, enter/ create the Sugar Custom Field Value Name. ??????????	
Dummy Shipping and Handling QB Sales Order Item Name		You have to put something – QB requires something.	
Use Dummy Shipping and Handling for Dummy Sales Order	No Yes	Select "Yes" if you want to use Dummy Shipping and Handling for QB Dummy Sales Orders.	
Populate Billing Address to QB Sales Order from	Do not populate Account Billing Address Quote Billing Address (custom field) Quote Billing Address (custom field with name) Quote Billing Address (custom field - all) Primary Contact Mailing Address	Select from pull-down menu to fill QB Sales Order from Billing Street Address with selections at the Account or Quote level.	Select from the Account or Quote level.
Populate Shipping Address to QB Sales Order from	Do not populate Account Shipping Address Quote Shipping Address (custom field) Quote Shipping Address (custom field with name) Quote Shipping	Select from pull-down menu to fill QB Sales Orders Shipping Street Address with selections at the Account or Quote level.	Select from the Account of Quote level.

	Address (custom field - all) Primary Contact Mailing Address		
Fill QB Sales Order Billing Street Address with	Do not fill As Sugar Source Name/Address First Name+Last Name/Name/ Address First Name+Last Name/Address Other	Select from pull-down menu the operation you want performed to create/ update to fill QB Sales Order Billing Street Address with.	"As Is" in Sugar or a formatted selection.
Fill QB Sales Order Shipping Street Address with	Do not fill As Sugar Source Name/Address First Name+Last Name/Name/ Address First Name+Last Name/Address Other	Select from pull-down menu the operation you want performed to create/ update to Fill QB Sales Order Shipping Street Address with.	"As Is" in Sugar or a formatted selection.
Create QB Line Item Description from Sugar Product Line and Product ones using	Overwrite Concatenate	Select "Overwrite" or "Concatenate" OB Line Item Description field from the Sugar Product Line.	
Filtering Sugar Field Name for Sales Order Operations		Sugar Custom field Filtering Sugar Field Name created/required to synchronize with QB Sales Order Operations.	
Filtering Value(s) for Sales Order to be Printed		Input value here	
Filtering Value(s) for Sales Order to be Emailed		Input value here	
Default Template for Sales Order		Name of default template selected for Sales Order processing	
Permitted sync operations from QB Sales Orders to Sugar Quotes	None Create and Update Create Only Update Only	Select from pull-down menu synchronization options from QB Sales Orders to Sugar Quotes.	Depending if you're initializing either Sugar or QB, or just one of them is new – you may decide on these functions. Ex. If QB Jobs are

			already there, and you don't want them over-ridden by Sugar Quotes, you would select "Update Only".
Create/Update Sugar Quotes when	QB SO created/ modified QB SO field has certain value Other	Select from pull-down menu to create new Sugar Quote when.	
QB Field Name to create/ update Sugar Quotes		QB Field Name to synchronize with the selection of "Create/ Update Sugar Quote when".	
QB Field Value to create/ update Sugar Quotes		QB Field Value synchronize with the selection of "Create/ Update Sugar Quote when".	
New Sugar Quotes Stage			
Update Sugar Quotes amounts with calculated QB Sales Order amounts	Never For Line Items Only For Line Items and Total	Select from pull-down menu to update Sugar Quote amounts with the calculated QB Sales Order amounts at line item level or line item and total at Quote level.	QB is a financial application, Sugar is a CRM. QB calculates line items and total for SO's. You may bring over the updated actual (including tax, etc.) at line item and total level; if you have selected bi-directional).
Populate Billing Address Change in QB Sales Order to	Do not populate Account Billing Address Quote Billing Address (custom field) Quote Billing Address (custom field with name) Quote Billing Address (custom field - all) Primary Contact	Select from pull-down menu the operation you want performed to populate the Billing Address change from the Account or Opportunity Billing Address to the QB Sales Order.	

	Mailing Address		
Populate Shipping Address Change in QB Sales Order to	Do not populate Account Shipping Address Quote Shipping Address (custom field) Quote Shipping Address (custom field with name) Quote Shipping Address (custom field – all Primary Contact Mailing Address	Select from pull-down menu the operation you want performed to populate the Shipping Address change in the Account or Opportunity Billing Address to the QB Sales Order.	
Expand Sugar Group Product after QB Group Item expanded	No Yes	???	???
Create Quote without line items	No Yes		
Support for multiple identical line items required	No Yes	Select “Yes” if you want support for multiple identical line items on the QB Sales Order.	Some customer may have a line item entry – ex. identical to the previous, but without a price (it may be a demo).
Sugar Quote Custom field with Remaining Balance		Sugar Custom field Name created/required to synchronize with QB Remaining Balance field.	
Sugar Quote Custom field with Customer/Job Name		Sugar Custom field Name created/required to synchronize with QB Customer/Job Name	
Include Quote Primary Contact Lookup	No Yes	Select “Yes” if you want to include Primary Contact lookup from Quote. This will overwrite Account/Contact Primary Contact.	
Sugar Quote Custom field with QB Purchase Order#		Sugar Custom field Name created/required to synchronize with QB Purchase Order #.	

Sugar Quote Custom field with QB Invoice#		Sugar Custom field Name created/required to synchronize with QB Invoice #.	
Sugar Quote Custom field with QB Sales Receipt#		Sugar Custom field Name created/required to synchronize with QB Sales Receipt #.	
Sugar Quote Custom field with QB Sales Order Date		Sugar Custom field Name created/required to synchronize with QB Sales Order Date.	
QB Custom field for Sugar Quote Name		QB Custom field created/ required to synchronize with Sugar Quote Name above.	
Sugar Quote field to QB Custom field custom mapping 1		Sugar Custom field Name created/required to synchronize with QB Custom Field created/ required.	Ex. Sugar;QB – separate with a semi-colon ";". You may enter as many as you wish – separate with a comma ",".
Sugar Quote field to QB Custom field custom mapping 2 (more mappings)		Sugar Custom field Name created/required to synchronize with QB Custom Field created/ required.	Ex. Sugar;QB – separate with a semi-colon ";". You may enter as many as you wish – separate with a comma ",".
Sugar Quote Owner to QB Sales Rep mapping required	No Yes	Select "Yes" if you want to map the QB Sales Rep structure to the Sugar Quote Owner field created/required.	
Sugar Custom field for Class		Sugar Custom field Name created/required to synchronize with QB Class Field.	
Sugar Custom field for Created SO Number		Sugar Custom field Name created/required to synchronize with QB SO Number Field.	
Sugar Duplicate Prevention		???	???

Field			
Fast Search for a Customer	No Yes	Select “Yes” if you invoke fast query search attribute in QB	If you are over 50% capacity in your QB company file, select yes.

3.1.6 SUG Quote to QB Purchase Order

Smart Solutions **– Sugar Quote to QB Purchase Order**

Property Name	Property Value	Entry Description	Notes
Sugar Quote Custom field with QB Purchase Order #		For each Solution, we bind primary/secondary keys in each application to each other.	Sign-in to your Sugar account, choose Setup at the top, select App Setup on the left, select Quotes, then Fields. Choose Quote Name and copy/ past the API field name into Property Value. Sugar Accounts will now be bound to QB Purchase Order.
QB Purchase Order # is generated by	Sugar QB	Select Sugar or QB to determine which application will generate the QB Purchase Order #.	If you select QB, then any Sales Orders input by Accounting Opps will update Sugar (if you have chosen bi-directional at Object level).
QB Vendor is linked to the Quote as	Sugar Account via standard link Sugar Account via custom link Custom field in Sugar Product Sugar Custom Object	Select how you would like the QB Vendor to link to the Quote	
Vendor Exceptions List	???		
Permitted sync operations	None	Select from pull-down	Depending if you’re

from Sugar Quotes to QB Purchase Orders	Create and Update Create Only Update Only	menu the synchronization operation you want performed from Sugar Opportunities to QB Purchase Orders.	initializing either Sugar or QB, or just one of them is new – you may decide on these functions. Ex. If QB Purchase Orders are already there, and you don't want them over-ridden by Sugar Opportunities, you would select "Update
Create new QB Purchase Order when	When Sugar Quote created Sugar Quote is in certain stage Sugar Quote Custom field has certain value Sugar Quote is Won Other	Select from pull-down menu the operation you want performed to create a new QB Purchase Order. If you select a Sugar Quotes custom field, you need to create it Sugar Quotes.	
Sugar Quotes Stage to create new QB Purchase Order		The stage "value" that will trigger the creation of the new QB Purchase Order.	Select from the Account of Quotes level.
Sugar Custom Field Name to create new QB Purchase Order		If QB "Create new QB Purchase Order when" was selected above, enter/create the Sugar Custom Field Name.	
Sugar Custom Field Value to create new QB Purchase Order		If QB "Create new QB Purchase Order when" was selected above, enter/create the Sugar Custom Field Value	
Populate Vendor Address to QB Purchase Order from	Do not populate Account Billing Address Vendor Billing Address (custom field) Vendor Billing Address (custom field with name) Vendor Billing Address (custom field - all) Primary Contact	Select from pull-down menu to fill QB Vendor from Billing Street Address with selections at the Account or Quote level.	Select from the Account or Quote level.

	Mailing Address		
Populate Shipping Address to QB Purchase Order from	Do not populate Account Shipping Address Quote Shipping Address (custom field) Quote Shipping Address (custom field with name) Quote Shipping Address (custom field - all) Primary Contact Mailing Address	Select from pull-down menu to fill QB Purchase Orders Shipping Street Address with selections at the Account or Quote level.	Select from the Account or Quote level.
Fill QB Purchase Order Billing Street Address with	Do not fill As Sugar Source Name/Address First Name+Last Name/Name/ Address First Name+Last Name/Address Other	Select from pull-down menu the operation you want performed to create/ update to fill QB Purchase Order Billing Street Address with.	“As Is” in Sugar or a formatted selection.
Fill QB Purchase Order Shipping Street Address with	Do not fill As Sugar Source Name/Address First Name+Last Name/Name/ Address First Name+Last Name/Address Other	Select from pull-down menu the operation you want performed to create/ update to Fill QB Purchase Order Shipping Street Address with.	“As Is” in Sugar or a formatted selection.
Create QB Line Item Description from Sugar Product Line and Product ones using	Overwrite Concatenate	Select “Overwrite” or “Concatenate” OB Line Item Description field from the Sugar Product Line.	
Filtering Sugar Field Name for Purchase Order Operations		Sugar Custom field Filtering Sugar Field Name created/required to synchronize with QB Purchase Order Operations.	
Filtering Value(s) for Purchase Order to be Printed		Select filtering values for PO's to be printed	

Filtering Value(s) for Purchase Order to be Emailed		Select filtering values for PO's to be emailed	
Default Template for Purchase Order		Name of default template selected for Sales Order processing	
Permitted sync operations from QB Purchase Orders to Sugar Quote	None Create and Update Create Only Update Only	Select from pull-down menu synchronization options from QB Purchase Orders to Sugar Quote.	Depending if you're initializing either Sugar or QB, or just one of them is new – you may decide on these functions. Ex. If QB Jobs are already there, and you don't want them over-ridden by Sugar Quote, you would select "Update Only".
Create/Update Sugar Quote when	QB PO created/ modified QB PO field has certain value Other	Select from pull-down menu to create new Sugar Quote when	
QB Field Name to create/ update Sugar Quote		QB Field Name to synchronize with the selection of "Create/ Update Sugar Quote when".	
QB Field Value to create/ update Sugar Quote		QB Field Value synchronize with the selection of "Create/ Update Sugar Quote when".	
New Sugar Quote Stage			
Update Sugar Quote amounts with calculated QB Purchase Order amounts	Never For Line Items Only For Line Items and Total	Select from pull-down menu to update Sugar Quote amounts with the calculated QB Purchase Order amounts at line item level or line item and total at Quote level.	QB is a financial application, Sugar is a CRM. QB calculates line items and total for SO's. You may bring over the updated actual (including tax, etc.) at line item and total level; if you have selected bi-

			directional).
Populate Vendor Address Change in QB Purchase Order to	Do not populate Account Vendor Address Quote Vendor Billing Address (custom field) Quote Vendor Billing Address (custom field with name) Quote Vendor Billing Address (custom field - all) Primary Contact Mailing Address	Select from pull-down menu the operation you want performed to populate the Billing Address change from the Account or Quote Billing Address to the QB Purchase Order.	
Populate Shipping Address Change in QB Purchase Order to	Do not populate Account Shipping Address Quote Shipping Address (custom field) Quote Shipping Address (custom field with name) Quote Shipping Address (custom field – all Primary Contact Mailing Address	Select from pull-down menu the operation you want performed to populate the Shipping Address change in the Account or Quote Billing Address to the QB Purchase Order.	
Expand Sugar Group Product after QB Group Item expanded	No Yes	Select “Yes” if you want support for multiple identical line items on the QB Purchase Order.	
Create Quote without line items	No Yes		
Support for multiple identical line items required	No Yes	Select “Yes” if you want support for multiple identical line items on the QB Purchase Order.	Some customer may have a line item entry – ex. identical to the previous, but without a price (it may be a demo).
Sugar Quote Custom field with Vendor Name		Sugar Custom field Name created/required to synchronize with QB Vendor Name field.	

Include Quote Primary Contact Lookup	No Yes	Select “Yes” if you want to include Primary Contact lookup from Quote. This will overwrite Account/Contact Primary Contact.	
Sugar Quote Custom field with QB Purchase Order#		Sugar Custom field Name created/required to synchronize with QB Purchase Order #.	
QB Custom field for Sugar Quote Name		QB Custom field created/ required to synchronize with Sugar Quote Name above.	
Sugar Quote field to QB Custom field custom mapping 1		Sugar Custom field Name created/required to synchronize with QB Custom Field created/ required.	Ex. Sugar;QB – separate with a semi-colon “;”. You may enter as many as you wish – separate with a comma “,”.
Sugar Quote field to QB Custom field custom mapping 2 (more mappings)		Sugar Custom field Name created/required to synchronize with QB Custom Field created/ required.	Ex. Sugar;QB – separate with a semi-colon “;”. You may enter as many as you wish – separate with a comma “,”.
Sugar Custom field for Vendor Discount		Sugar Custom field Name created/required for Vendor Discount	
Sugar Custom field for Class		Sugar Custom field Name created/required to synchronize with QB Class Field.	
Sugar Custom field for Created PO Number		Sugar Custom field Name created/required to synchronize with QB PO Number Field.	
Sugar Duplicate Prevention Field		???	???
Fast Search for a Vendor		???	

3.1.7 SUG Quote to QB Invoice

Smart Solutions **– Sugar Quote to QB Invoice**

Property Name	Property Value	Entry Description	Notes
Sugar Quote Custom field with QB Invoice#	Sugar field selected/ created to bind QB Customer List ID to.	For each Solution, we bind primary/secondary keys in each application to each other. Sign-in to your Sugar account, choose Setup at the top, select App Setup on the left, select Quote, then Fields. Choose Quote Name and copy/ past the API field name into Property Value. Sugar Accounts will now be bound to QB Invoice **#.**	
QB Invoice # is generated by	Sugar QB	Select "QB" if you want QB Invoice #'s to be generated by QB.	
Permitted sync operations from Sugar Quote to QB Invoices	None Create and Update Create Only Update Only	Select from pull-down menu the synchronization operation you want performed from Sugar Quote to QB Invoices.	
Create new QB Invoice when	When Sugar Quote created Sugar Quote is in certain stage Sugar Quote Custom field has certain value Sugar Quote is Won Other	Select from pull-down menu the operation you want performed to create a new QB Invoice. If you select a Sugar Quote custom field, you need to create it Sugar Quote.	
Sugar Quote Stage to create new QB Invoice		The stage "value" that will trigger the creation of the new QB Invoice.	
Sugar Custom Field Name to create new QB Invoice		Sugar Custom Field Name to synchronize with the selection of	

		"Create/Update Sugar Invoice when".	
Sugar Custom Field Value to create new QB Invoice		Sugar Custom Field Value synchronize with the selection of "Create/ Update QB Invoice when".	
Field name(s) for QB Invoice Line Item Service Dates			
Skip Sugar Quote amounts when creating/updating QB Invoice	No Yes	Select "Yes" if you want to Skip Sugar Quote amounts when creating/ updating QB Invoice from Sugar to QB.	
Dummy Shipping and Handling QB Item Name	No Yes	Select "Yes" if you want to use Dummy Shipping and Handling for QB Dummy Invoice.	
Populate Billing Address to QB Invoice from	Do not populate Account Billing Address Quote Billing Address (custom field) Quote Billing Address (custom field with name) Quote Billing Address (custom field - all) Primary Contact Mailing Address	Select from pull-down menu to fill QB Invoice from Billing Street Address with selections at the Quote level.	
Populate Shipping Address to QB Invoice from	Do not populate Account Shipping Address Quote Shipping Address (custom field) Quote Shipping Address (custom field	Select from pull-down menu to fill QB Invoice from Shipping Street Address with selections at the Quote level.	

	with name) Quote Shipping Address (custom field - all) Primary Contact Mailing Address		
Fill QB Invoice Billing Street Address with	Do not fill As Sugar Source Name/Address First Name+Last Name/Name/ Address First Name+Last Name/Address Other	Select from pull-down menu the operation you want performed to create/ update to fill QB Invoice Billing Street Address with.	
Fill QB Invoice Shipping Street Address with	Do not fill As Sugar Source First Name+Last Name/Name/ Address First Name+Last Name/Address Other	Select from pull-down menu the operation you want performed to create/ update to fill QB Invoice Shipping Street Address with.	
Create Pending Invoice	No Yes	Select "Yes" if you to create a QB Invoice with status "Pending".	
Create QB Line Item Description from Sugar Product Line and Product ones using	Overwrite Concatenate	Select "Overwrite" or "Concatenate" OB Line Item Description field from the Sugar Product Line.	
Filtering Sugar Field Name for Invoice Operations			
Filtering Value(s) for Invoice to be Printed		Insert Filtering Value	
Filtering Value(s) for Invoice to be Emailed		Insert Filtering Value	

Vendor Name/Reference for instant payment			
Field with a value for instant payment			
Default Template for Invoice	Default Template selected for Quote processing		
Permitted sync operations from QB Invoices to Sugar Quote	None Create and Update Create Only Update Only	Select from pull-down menu synchronization options from QB Invoices to Sugar Quote.	
Create/Update Sugar Quote when	QB Invoice created/ modified QB Invoice field has certain value Other	Select from pull-down menu to create new Sugar Quote when.	
QB Field Name to create/ update Sugar Quote		QB Field Name to synchronize with the selection of “Create/ Update Sugar Invoice when”.	
QB Field Value to create/ update Sugar Quote		QB Field Value synchronize with the selection of “Create/ Update Sugar Invoice when”.	
New Sugar Quote Stage	????		
Update Sugar Quote amounts with calculated QB Invoice amounts	Never For Line Items Only For Line Items and Total	Select from pull-down menu to update Sugar Quote amounts with the calculated QB Invoice amounts at line item level or line item and total at Quote level.	
Populate Billing Address Change in QB Invoice to	Do not populate Account Billing Address	Select from pull-down menu the operation you want performed to populate the Billing	

	Quote Billing Address (custom field) Quote Billing Address (custom field with name) Quote Billing Address (custom field - all) Primary Contact Mailing Address	Address change from the Account or Quote Billing Address to the QB Invoice.	
Populate Shipping Address Change in QB Invoice to	Do not populate Account Shipping Address Quote Shipping Address (custom field) Quote Shipping Address (custom field with name) Quote Shipping Address (custom field - all) Primary Contact Mailing Address	Select from pull-down menu the operation you want performed to populate the Shipping Address change from the Account or Quote Billing Address to the QB Invoice.	
Expand Sugar Group Product after QB Group Item expanded	No Yes	???	
Create Quote without line items	No Yes	Select "Yes" if you want to Create an Quote without line items.	
Support for multiple identical line items required	No Yes	Select "Yes" if you want support for multiple identical line items on the QB Invoice.	
Copy Credit Memo to Sugar Custom Object	No Yes		
Copy Payment to Sugar Custom Object	No Yes		

Sugar Quote Custom field with Remaining Balance		Sugar Custom field Name created/required to synchronize with QB Remaining Balance field.	
Sugar Quote Custom field with Customer/Job Name			
Include Quote Primary Contact Lookup	No Yes	Select "Yes" if you want to include Primary Contact lookup from Quote. This will overwrite Account/Contact Primary Contact.	
Sugar Quote Custom field with QB Purchase Order#		Sugar Custom field Name created/required to synchronize with QB Purchase Order #.	
Sugar Quote Custom Checkbox Is Paid		Sugar Custom field Name created/required to synchronize with QB Checkbox is Paid field.	
Sugar Quote Custom field with QB Invoice Date		Sugar Custom field Name created/required to synchronize with QB Invoice Date.	
QB Custom field for Sugar Quote Name		QB Custom field created/ required to synchronize with Sugar Quote Name above.	
Sugar Quote field to QB Custom field custom mapping 1		Sugar Custom field Name created/required to synchronize with QB Custom Field created/ required. Ex. Sugar;QB – separate with a semi	
Sugar Quote field to QB Custom field custom mapping 2		Sugar Custom field Name created/required to synchronize with QB Custom Field created/ required. Ex. Sugar;QB – separate with a semi	
Sugar Quote Owner to QB Sales Rep mapping required	No Yes	Select "Yes" if you want to map the QB Sales Rep structure to the Sugar Quote Owner field	

		created/required.	
Sugar Custom field for Class		Sugar Custom field Name created/required to synchronize with QB Class Field.	
Sugar Custom field for Created Invoice Number		Sugar Custom field Name created/required to synchronize with QB Invoice Number.	
Sugar Duplicate Prevention Field		???	
Fast Search for a Customer	No Yes		

3.1.8 SUG Quote to QB Sales Receipt

Smart Solutions **– Sugar Quote to QB Sales Receipt**

Property Name	Property Value	Entry Description	Notes
Sugar Quote Custom field with QB Sales Receipt#	Sugar field select ed/ create d to bind QB Custo mer List ID to.	For each Solution, we bind primary/secondary keys in each application to each other. Sign-in to your Sugar account, choose Setup at the top, select App Setup on the left, select Quote, then Fields. Choose Quote Name and copy/ past the API field name into Property Value. Sugar Accounts will now be bound to QB Sales Receipt **#.**	
QB Sales Receipt # is generated by	Sugar QB	Select “QB” if you want QB Sales Receipt #’s to be generated by QB.	
Permitted sync operations from Sugar Quote to QB Sales Receipts	None Create and Update Create Only Update Only	Select from pull-down menu the synchronization operation you want performed from Sugar Quote to QB Sales Receipts.	
Create new QB Sales	When Sugar	Select from pull-down	

Receipt when	Quote created Sugar Quote is in certain stage Sugar Quote Custom field has certain value Sugar Quote is Won Other	menu the operation you want performed to create a new QB Sales Receipt. If you select a Sugar Quote custom field, you need to create it in Sugar Quote.	
Sugar Quote Stage to create new QB Sales Receipt		The stage "value" that will trigger the creation of the new QB Sales Receipt..????	
Sugar Custom Field Name to create new QB Sales Receipt		Sugar Custom Field Name to synchronize with the selection of "Create/ Update Sugar Sales Receipt when".	
Sugar Custom Field Value to create new QB Sales Receipt		Sugar Custom Field Value synchronize with the selection of "Create/ Update QB Sales Receipt when".	
Dummy Shipping and Handling QB Item Name	???		
Populate Billing Address to QB Sales Receipt from	Do not populate Account Billing Address Quote Billing Address (custom field) Quote Billing Address (custom field with name) Quote Billing Address (custom field - all) Primary Contact Mailing Address	Select from pull-down menu to fill QB Sales Receipt from Billing Street Address with selections at the Quote level.	
Populate Shipping Address to QB Sales Receipt from	Do not populate Account Shipping Address Quote Shipping Address	Select from pull-down menu to fill QB Sales Receipt from Shipping Street Address with selections at the level.	

	(custom field) Quote Shipping Address (custom field with name) Quote Shipping Address (custom field - all) Primary Contact Mailing Address		
Fill QB Sales Receipt Billing Street Address with	Do not fill As Sugar Source Name/Address First Name+Last Name/Name/ Address First Name+Last Name/Address Other	Select from pull-down menu the operation you want performed to create/ update to fill QB Sales Receipt Billing Street Address with.	
Fill QB Sales Receipt Shipping Street Address with	Do not fill As Sugar Source Name/Address First Name+Last Name/Name/ Address First Name+Last Name/Address Other	Select from pull-down menu the operation you want performed to create/ update to fill QB Sales Receipt Shipping Street Address with.	
Create Pending Sales Receipt	No Yes	Select from pull-down menu if you wish to create QB Sales Receipts in pending status	
Create QB Line Item Description from Sugar Product Line and Product ones using	Overwrite Concatenate	Select “Overwrite” or “Concatenate” OB Line Item Description field from the Sugar Product Line.	
Default Template for Sales Receipt	Default Template name selected for QB Sales Receipt processing		
Permitted sync operations from QB Sales Receipts to Sugar Quote.	None Create and Update	Select from pull-down menu synchronization options from QB Sales	

	Create Only Update Only	Receipts to Sugar Quote.	
Update Sugar Quote amounts with calculated QB Sales Receipt amounts	Never For Line Items Only For Line Items and Total	Select from pull-down menu to update Sugar Quote amounts with the calculated QB Sales Receipts amounts at line item level or line item and total at Quote level.	
Create/Update Sugar Quote when	QB SR created/ modified QB SR field has certain value Other	Select from pull-down menu to create new Sugar Quote when.	
QB Field Name to create/ update Sugar Quote		QB Field Name to synchronize with the selection of “Create/ Update Sugar Quote when”.	
QB Field Value to create/ update Sugar Quote		QB Field Value synchronize with the selection of “Create/ Update Sugar Quote when”.	
New Sugar Quote Stage			
Populate Billing Address Change in QB Sales Receipt to	Do not populate Account Billing Address Quote Billing Address (custom field) Quote Billing Address (custom field with name) Quote Billing Address (custom field - all) Primary Contact Mailing Address	Select from pull-down menu the operation you want performed to populate the Billing Address change from the Account or Quote Billing Address to the QB Sales Receipt.	
Populate Shipping Address Change in QB Sales Receipt to	Do not populate Account Shipping Address	Select from pull-down menu the operation you want performed to populate the Shipping	

	Quote Shipping Address (custom field) Quote Shipping Address (custom field with name) Quote Shipping Address (custom field - all) Primary Contact Mailing Address	Address change from the Account or Quote Billing Address to the QB Sales Receipt.	
Expand Sugar Group Product after QB Group Item expanded	No Yes	???	
Create Quotewithout line items	No Yes		
Support for multiple identical line items required	No Yes	Select “Yes” if you want support for multiple identical line items on the QB Sales Receipt.	
Sugar Quote Custom field with OB Remaining Balance		Sugar Custom field Name created/required to synchronize with QB Remaining Balance field.	
Sugar Quote Custom field with Customer/Job Name			
Include Opportunity Primary Contact Lookup	No Yes	Select “Yes” if you want to include Primary Contact lookup from Quote. This will overwrite Account/Contact Primary Contact.	
Sugar Quote Custom field with QB Purchase Order#		Sugar Custom field Name created/required to synchronize with QB Purchase Order #.	
Sugar Quote Custom field with QB Sales Receipt Date		Sugar Custom field Name created/required to synchronize with QB Sales Receipt Date.	
QB Custom field for Sugar Quote Name		QB Custom field Name created/required to	

		synchronize with Sugar Quote.	
Sugar Quote field to QB Custom field custom mapping 1		Sugar Custom field Name created/required to synchronize with QB Custom Field created/ required. Ex. Sugar;QB – separate with a semi-colon “;”.	
Sugar Quote field to QB Custom field custom mapping 2 (more mappings)		Sugar Custom field Name created/required to synchronize with QB Custom Field created/ required. Ex. Sugar;QB – separate with a semi-colon “;”.	
Sugar Quote Owner to QB Sales Rep mapping required	No Yes	Select “Yes” if you want to map the QB Sales Rep structure to the Sugar Quote Owner field created/required.	
Sugar Custom field for Sales Receipt Terms		Sugar Custom field Name created/required to synchronize with QB Sales Receipt field.	
Sugar Custom field for Shipping Method		Sugar Custom field Name created/required to synchronize with QB Shipping Method field.	
Sugar Custom field for Class		Sugar Custom field Name created/required to synchronize with QB Class field.	
Sugar Custom field for Created SR Number		Sugar Custom field Name created/required to synchronize with QB Shipping Method field.	
Sugar Duplicate Prevention Field		?????????????????????????????	
Fast Search for a Customer	No Yes		

3.1.9 SUG Quote to QB Estimate

Smart Solutions **– Sugar Quote to QB Estimate**

Property Name	Property Value	Entry Description	Notes
Sugar Quote Custom field with QB Estimate#		For each Solution, we bind primary/secondary keys in each application to each other. Sign-in to your Sugaraccount, choose Setup at the top, select App Setup on the left, select Quotes, then Fields. Choose Quote Name and copy/ past the API field name into Property Value. Sugar Accounts will now be bound to QB Sales Estimate **#.**	
QB Estimate # is generated by	Sugar QB	Select “QB” if you want QB Estimate #’s to be generated by QB.	
Permitted sync operations from Sugar Quotes to QB Estimates	None Create and Update Create Update Only	Select from pull-down menu the synchronization operation you want performed from Sugar Quotes to QB Estimates.	
Create new QB Estimate when	When Sugar Quote created Sugar Quote is in certain stage Sugar Quote Custom field has certain value Sugar Quote is Won Other	Select from pull-down menu the operation you want performed to create a new QB Sales Receipt. If you select a Sugar Quote custom field, you need to create it Sugar Estimates.	
Sugar Quote Stage to create new QB Estimate		The stage “value” that will trigger the creation of the new QB Estimate.	
Sugar Custom Field Name to create new QB Estimate		Sugar Custom Field Name to synchronize with the selection of “Create/Update new QB	

		Estimate when”.	
Sugar Custom Field Value to create new QB Estimate		Sugar Custom Field Value synchronize with the selection of “Create/ Update QB Estimate when”.	
Dummy Shipping and Handling QB Item Name	????		
Populate Billing Address to QB Estimate from	Do not populate Account Billing Address Quote Billing Address (custom field) Quote Billing Address (custom field with name) Quote Billing Address (custom field - all) Primary Contact Mailing Address	Select from pull-down menu to fill Estimate from Billing Street Address with selections at the Quote level.	
Fill QB Estimate Billing Street Address with	Do not fill As Sugar Source Name/Address First Name+Last Name/Name/ Address First Name+Last Name/Address Other	Select from pull-down menu to fill QB Estimate from Shipping Street Address with selections at the Quote level.	
Create QB Line Item Description from Sugar Product Line and Product ones using	Overwrite Concatenate	Select “Overwrite” or “Concatenate” OB Line Item Description field from the Sugar Product Line.	
Default Template for Estimate	Default Template selected for QB Estimate processing		
Permitted sync operations from QB Estimates to Sugar Quotes	None Create and Update Create Only Update Only	Select from pull-down menu synchronization options from QB Estimates to Sugar Quotes.	

Create/Update Sugar Quote when	QB Estimate created/modified QB Estimate field has certain value Other	Select from pull-down menu to create new Sugar Quote when.	
QB Field Name to create/ update Sugar Quote		QB Field Name to synchronize with the selection of “Create/ Update Sugar Quote when”.	
QB Field Value to create/ update Sugar Quote		QB Field Value synchronize with the selection of “Create/ Update Sugar Quote when”.	
New Sugar Quote Stage			
Update Sugar Quote amounts with calculated QB Estimate amounts	Never For Line Items Only For Line Items and Total	Select from pull-down menu to update Sugar Quote amounts with the calculated QB Estimates amounts at line item level or line item and total at Quote level.	
Populate Billing Address Change in QB Estimate to	Do not populate Account Billing Address Quote Billing Address (custom field) Quote Billing Address (custom field with name) Quote Billing Address (custom field - all) Primary Contact Mailing Address	Select from pull-down menu the operation you want performed to populate the Billing Address change from the Account or Quote Billing Address to the QB Estimate.	
Expand Sugar Group Product after QB Group Item expanded	No Yes	???	
Create Quote without line items	No Yes		
Support for multiple identical line items required	No Yes	Select “Yes” if you want support for multiple identical line items on the	

		QB Estimate.	
Support for multiple identical line items required	No Yes		
Sugar Quote Custom field with Customer/Job Name		Sugar Custom field Name created/required to synchronize with QB Customer/Job Name field.	
Sugar Quote Custom field with QB Estimate Date		Sugar Custom field Name created/required to synchronize with QB Estimate Date field.	
QB Custom field for Sugar Quote Name		QB Custom field Name created/required to synchronize with Sugar Quote.	
Sugar Quote field to QB Custom field custom mapping		Sugar Custom Quote field created/required to synchronize with QB Custom field created/ required. This is a generic place holder.	
Sugar Quote field to QB Custom field custom mapping 1		Sugar Custom field Name created/required to synchronize with QB Custom Field created/ required. Ex. Sugar;QB – separate with a semi-colon “;”.	
Sugar Quote field to QB Custom field custom mapping 2		Sugar Custom field Name created/required to synchronize with QB Custom Field created/ required. Ex. Sugar;QB – separate with a semi-colon “;”.	
Include Quote Primary Contact Lookup	No Yes	Select “Yes” if you want to include the Quote Primary Contact lookup as an override.	
Sugar Quote Owner to QB Sales Rep mapping required	No Yes	Select “Yes” if you want to synchronize Sugar Quote Owner with QB Sales Rep Mapping.	

Sugar Custom field for Customer Terms		Sugar Custom field Name created/required to synchronize with QB Customer Terms field.	
Sugar Custom field for Shipping Method		Sugar Custom field Name created/required to synchronize with QB Shipping Method field.	
Sugar Custom field for Class		Sugar Custom field Name created/required to synchronize with QB Class field.	
Sugar Custom field for Created Estimate Number		Sugar Custom field Name created/required to synchronize with QB Created Estimate Number field.	
Sugar Duplicate Prevention Field		???	
Fast Search for a Customer			

3.1.10 Sugar Quote to QB Bill

Smart Solutions **– Sugar Quote to QB Bill**

Property Name	Property Value	Entry Description	Notes
Sugar Quote Custom field with QB Bill#		For each Solution, we bind primary/secondary keys in each application to each other. Sign-in to your Sugar Account, choose Setup at the top, select App Setup on the left, select Quotes, then Fields. Choose Quote Name and copy/ past the API field name into Property Value. Sugar Accounts will now be bound to QB Sales Bill **#.**	
QB Bill # is generated by	Sugar QB	Select “QB” if you want QB Bill #'s to be generated by QB.	
QB AP Account Name			

QB Default Expense Account Name to create QB Bill			
Sugar Field Name for QB Bill Amount			
Sugar Quote Field with QB Bill Date			
Sugar Field Name for QB Bill Vendor Reference			
Sugar Custom Object for QB Expense Bill Lines			
Sugar Reference to QB Customer/Job			
Permitted sync operations from Sugar Quotes to QB Bills	None Create and Update Create Update Only	Select from pull-down menu the synchronization operation you want performed from Sugar Quotes to QB Bills.	
Sugar Custom Field Name to create new QB Bill		Sugar Custom Field Name to synchronize with the selection of “Create/Update new QB Bill when”.	
Sugar Custom Field Value to create new QB Bill		Sugar Custom Field Value synchronize with the selection of “Create/ Update QB Bill when”.	
QB Field Name to create/ update Sugar Quote		QB Field Name to synchronize with the selection of “Create/ Update Sugar Quote when”.	
QB Field Value to create/ update Sugar Quote		QB Field Value synchronize with the selection of “Create/ Update Sugar Quote when”.	
Sugar Quote field to QB Custom field custom mapping 1		Sugar Custom field Name created/required to synchronize with QB Custom Field created/ required. Ex. Sugar;QB –	

		separate with a semi-colon “;”.	
Sugar Quote field to QB Custom field custom mapping 2		Sugar Custom field Name created/required to synchronize with QB Custom Field created/ required. Ex. Sugar;QB – separate with a semi-colon “;”.	
Sugar Custom field for Bills Terms		Sugar Custom field Name created/required to synchronize with QB Customer Bill Terms field.	
Sugar Custom field for Bill Class		Sugar Custom field Name created/required to synchronize with QB Bill Class field.	
Sugar field for Bill Memo		Sugar Custom field Name created/required to synchronize with QB Created Bill Memo field.	
Sugar Custom field for Created Bill Number		Sugar Custom field Name created/required to synchronize with QB Created Bill Number field.	

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3.1.11 SUG Quote to QB Check

Smart Solutions **– Sugar Quote to QB Check**

Property Name	Property Value	Entry Description	Notes
Sugar Quote Custom Object for QB Commission Check		Define the Sugar Custom Object for integration with the QB Commission Check	
Sugar Field with QB Commission Check #			
QB Commission Check # is generated by	Sugar QB	Select “QB” if you want QB Check #’s to be generated by QB.	

QB Bank Account Name to create commission QB Check			
QB GL Account Name to create commission QB Check			
Sugar Field Name for QB Commission Check Amount			
Sugar Quote Field with QB Commission Check Date			
Sugar Field Name for QB Commission Check Payee Reference			
Sugar Custom Object for QB Compensation Check			
Sugar Field with QB Compensation Check #			
QB Compensation Check # is generated by	Sugar QB	Select “QB” if you want QB Check #’s to be generated by QB.	
QB Bank Account Name to create QB Compensation Check			
QB GL Account Name to create QB Compensation Check			
Sugar Field Name for QB Compensation Check Amount			
Sugar Quote Field with QB Compensation Check Date			
Sugar Field Name for QB Compensation Check Payee Reference			
Permitted sync operations from Sugar Quotes to QB Checks	None Create and Update Create Update Only	Select from pull-down menu the synchronization operation you want performed from Sugar Quotes to QB Checks.	

Create new QB Check when	Sugar Quote is created Sugar Quote is in certain stage Sugar Quote Custom field has certain value Other		
Sugar Quote Stage to create new QB Check			
Sugar Custom Field Name to create new QB Check		Sugar Custom Field Name to synchronize with the selection of "Create/Update new QB Check when".	
Sugar Custom Field Value to create new QB Check		Sugar Custom Field Value synchronize with the selection of "Create/ Update QB Check when".	
Populate Address to QB Check from	Do not populate Account Billing Address Quote Billing Address (custom field) Quote Billing Address (custom field with name) Quote Billing Address (custom field - all) Primary Contact Mailing Address	Select from pull-down menu to fill QB Sales Order from Billing Street Address with selections at the Account or Quote level.	
Fill QB Check Street Address with	Do not fill As Sugar Source Name/Address First Name+Last Name/Name/ Address First Name+Last Name/Address Other	Select from pull-down menu to fill QB Customers Street Address with selections at the Account level.	
Sugar Quote field to QB Custom field custom mapping 1		Sugar Custom field Name created/required to synchronize with QB Custom Field created/ required. Ex. Sugar;QB –	

		separate with a semi-colon “;”.	
Sugar Quote field to QB Custom field custom mapping 2		Sugar Custom field Name created/required to synchronize with QB Custom Field created/ required. Ex. Sugar;QB – separate with a semi-colon “;”.	
Sugar Custom field for Class		Sugar Custom field Name created/required to synchronize with QB Check Class field.	

3.1.12 SUG Products to QB Items

Smart Solutions **– Sugar Product to QB Inventory Item**

Property Name	Property Value	Entry Description	Notes
Binding between Sugar Product and QB Inventory Item	Product Name - Item Name Product Name - Item SKU (custom) Product Code - Item SKU (custom) Product Code - Item Name Other	For each Solution, we bind primary/secondary keys in each application to each other. Sign-in to your Sugaraccount, choose Setup at the top, select App Setup on the left, select Products (Your Sugarversion must contain the Product option), then Fields. Choose Product Name and copy/ past the API field name into Property Value. Sugar Products will now be bound to QB Inventory Item**.**	
Sugar Product field containing Item Name			
Custom Object Name to create QB Item			
Sugar Product field containing Product Group Name		Sugar Product Field Name created/required to synchronize with QB Product Group Name field.	

Sugar Product field containing Item Name for sub-items		Sugar Product Field Name created/required to synchronize with QB Item Name for sub-items.	
Sugar Support for Item cost required	No Yes	Select “Yes” if you want to use Sugar Support for Inventory Items Cost required.	
Sugar Support for Item weight required	No Yes	Select “Yes” if you want to use Sugar Support for Item weight required.	
Sugar Product field containing Purchase Description			
Sugar Product field containing Quantity on Hand			
Permitted sync operations from Sugar Products to QB Inventory Items	None Create and Update Create Only Update Only	Select from pull-down menu synchronization options from Sugar Products to QB Inventory Items.	
Sugar Product field to select QB Item Type		Sugar Product Field Name created/required to synchronize with QB Item Type.	
Default Income Account for Inventory Item Type		Sugar Product Default Income Account “Value” for QB Inventory Item Type.	
Default COGS Account for Inventory Item Type		Sugar Product Default COGS Account “Value” for QB Inventory Item Type.	
Default Asset Account for Inventory Item Type		Sugar Product Default Asset Account “Value” for QB Inventory Item Type.	
Sugar Product field value for Non-Inventory Item Type		Sugar Product Field Name created/required to synchronize with QB Non-Inventory Item Type.	
Default Account for Non-Inventory Item Type		Sugar Product Default Account “Value” for QB Non-Inventory Item Type.	
Default Account for Non-			

Inventory Item Type			
Sugar Support for Reimbursable Non-Inventory Items required	no yes	Select “Yes” if you want to use Sugar Support for Reimbursable Non-Inventory Items required	
Default Expense Account for Reimbursable Non-Inventory Item Type			
Sugar Product field value for Service Item Type		Sugar Product Field “Value” for QB Service Item Type.	
Default Account for Service Item Type		Sugar Product Default Account “Value” for QB Service Item Type.	
Default Expense Account for Other Charge Item Type with Cost Support		Sugar Product Default Expense Account for Other Charge Item Type.	
Sugar Product field value for Discount Item Type		Sugar Product Field “Value” for QB Discount Item Type.	
Default Account for Discount Item Type		Sugar Product Default Account “Value” for QB Discount Item Type.	
Sugar Field Name to Define Margin			
Sugar Field Name For Sales Price with Margin			
Default QB Tax Code for Taxable Items			
Default QB Tax Code for Non-Taxable Items			
Permitted sync operations from QB Inventory Items to Sugar Products	None Create and Update Create Only Update Only	Select from pull-down menu synchronization options from QB Inventory Items to Sugar Products.	
QB Field Name to Define Margin			
Field Values to Define Margins			
Standard Price Margin Values			

List of Default Currencies			
QB Field for Sugar Product Family			
QB Custom Field to QB Suppress Transaction		Sugar Custom Field Name created/required to synchronize with the QB Suppress Transaction.	
Populate Sugar Product Code with	Do Not Populate Item Name Item Description Item SKU (custom)	Select from pull-down menu to populate the Sugar Product Code with selections at the QB Item level.	
Upload Inactive QB Items	No Yes	Select “Yes” if you want to upload Inactive QB Items to Sugar	

3.1.13 QB Company File

Multiple QB Company Files Support

Property Name	Property Value	Entry Description	Notes
Number of QB Company Files		Enter number of QB Company Files Sugar will be integrating with. The number entered will generate the User ID and Password entries on the next page.	

3.1.14 SUG / QB Credentials / Properties

Smart Solutions **– Sugar Credentials**

Property Name	Property Value	Entry Description	Notes
Sugar Integration URI		SugarCRM Id – to allow authorized connection with Quickbooks.	
Sugar Integration User		SaleSugarorce.com User Id – to allow authorized connection with SaleSugarorce.	
Sugar Integration Password		SaleSugarorce.com Password – to allow authorized connection with SaleSugarorce.	
Confirm Sugar Integration Password		Confirmed SaleSugarorce.com Password – to allow authorized connection with SaleSugarorce.	

QB Credentials

Property Name	Property Value	Entry Description	Notes
QB Integration URL		Quickbooks Id – to allow authorized connection	

		with Quickbooks.	
QB Integration User		Quickbooks Password – to allow authorized connection with Quickbooks.	
QB Integration Password/ Token		Quickbooks Password – to allow authorized connection with Quickbooks.	
Confirm QB Integration Password/Token		Confirmed Quickbooks Password – to allow authorized connection with Quickbooks.	

Other Properties

Property Name	Property Value	Entry Description	NotesSu
Sugar Version/Edition	Home Professional MRC	Select from pull-down menu the version of Sugar you will integrating with.	
QB Version/Local	USA Canada Australia New Zealand South East Asia	Select from pull-down menu the version of Quickbooks you will integrating with.	
Environment to connect	Production A Production B Production C Production D Development	Select from pull-down menu the Environment version of Quickbooks you will integrate with. Speak with an InterWeave Solutions Specialist before selecting or moving an environment.	
Multi-currency support	Convert to base currency Propagate transaction currency		
Extended Connection Timeout required	No Yes	Select “Yes” if you to notify want to notify your admin in addition to your main User ID	

		that you signed on with.	
Email Notification Mode	None Connection Failures Only After Every Error Connection Failures and Full Daily Report Connection Failures and Error Daily Report Error Daily Report Only Full Daily Report Only	Select from pull-down menu the action you would like upon a data or connection error determined by InterWeave.	
Use Admin e-mail for Notification	No Yes	Select “Yes” if you to notify want to notify your admin in addition to your main User ID that you signed on with.	
CC Email Notification Addresses		Additional email notification to this address.	
BCC Email Notification Addresses		Blind additional email notification to this address.	
Hosting Provider Email Notification Addresses			
Stop Scheduled Transaction	Never After Every Connection Failure After Every Error	Select from pull-down menu the action you would like upon a data or connection error determined by InterWeave.	
Start time of sleep window		Start and Stop time Sleep Windows allow a customer to stop all flows to stop – and backups of Quickbooks to be executed. This is Start time in the following format hh: mm:ss	

End time of sleep window		Start and Stop time Sleep Windows allow a customer to stop all flows to stop – and backups of Quickbooks to be executed. This is Stop time in the following format hh: mm:ss	
Time Zone Shift		If a customer is hosting Quickbooks, and it is in a different time zone – enter the time zone here. The format is: ex. Est, cst, mst or pst.	

3.1.15 Common Error Messages

Smart Solutions allow customers to configure complete integration Solutions between "Best of Breed" applications at Object level, uni or bi-directionally. Whether you looking to integrate SugarCRM.com to Quickbooks, ACCPAC, Oracle or MAS, or eCommerce to Inventory to Databases or Web Services - **MRC SugarCRM** has the configurable Solutions for you.

The very essence of integrating "Best of Breed" applications - creates the possibility of errors from multiple applications.

This chapter contains the following sections:

- Connection Errors - General
- **Smart** Solution Issued Errors
- Quickbooks Issued Errors
- QODBC Issued Errors

3.1.15.1 Connection Errors

Please see detail below.

3.1.15.1.1 Quickbooks

Connection Failures in your Microsoft and Quickbooks Environment

These are multiple possible reasons for Quickbooks connection failures in your environment. Whereas excellent progress has been made in Quickbooks and Flex Quarter's QODBC software driver - there still are significant obstacles relating to integration. Possible reasons are:

Networking changes

If you have made changes to your external IP address, internal IP address of your QB server, Router changes (Port forwarding etc., these may effect your integration settings.

Action: Please contact support@interweave.biz to coordinate these types of activities.

Quickbooks is locked by some pop-up

Pop up's will cause connection disruption, i.e., registration request, upgrade request, backup request, sometimes reminder etc.

Action: Suppress pop-ups in Quickbooks

Quickbooks is locked by some operation that requires exclusive access to a company file

If your running on-line banking, back-up's, etc., you need to stop your Transformation Flows when you do these types of activities.

Action: Restart your Transformation Flows when your done with other activities.

Quickbooks is locked by some other integration application operation that requires exclusive access to a company file

If your running other integration applications - this may cause a conflict.

Action: Please contact support@interweave.biz to coordinate these types of activities.

Quickbooks is running in single-user mode or under the same user that used for integration

Correct setting for integration is multiple-user mode.

Action: Consider buying/assigning a separate Quickbooks Client License for integration only if problem persist.

Connector is not running

Check the IBizQ Remote Connector (icon typically at bottom right of your desktop)Select Logging tab to see if running.

Action: Start Connector, re-start flows.

More then one connector is running

Check the IBizQ Remote Connector (icon typically at bottom right of your desktop)Select Logging tab to see if running.

Action: Stop both connectors - start correct one.

Windows registry changes that affected connector settings

If changes have been done to your Windows Registry, this may effect your connection settings.

Action: Please contact support@interweave.biz to coordinate these types of activities.

Company file moved to other location.

If your Quickbooks Company file has been moved, you need to update the location of the file in the Integration Manager Configuration.

Action: Contact support@interweave.biz to setup a new file location.

Company file configuration changed

If your Quickbooks Company file has changed, this change has to be addressed in the Solution.

Action: Please contact support@interweave.biz to coordinate these types of activities.

Other (Windows) issues:

Windows XP, Service Pack 2 is recommended; it is a stable operating environment. Vista is not recommended and not supported. First choice must be Windows Server 2003 then Windows XP but Service Pack must be 3.

Windows can update and reboot but nobody is logged in so connector is not running. ITX auto-user approach fixes this but other Windows problems can lock the server

3.1.15.1.2 SugarCRM

Enter topic text here.

3.1.15.1.3 ACCPAC

Enter topic text here.

3.1.15.1.4 MAS 90/200

Enter topic text here.

3.1.15.1.5 Nexternal

Enter topic text here.

3.1.15.2 InterWeave Issued Errors

There are various **Smart** Solutions issued Error Messages.

Connection and Data are the two primary causes. The most common are:

"ERROR XmlsqParams.statement" - a Parameter Statement error

Example Message: The following Error occurred during the execution of the Transaction Flow SFLeadOut2CMSLead_2008-05-15 18:58:01.027 IW 2.4 TS SFLeadOut2CMSLead_ERROR XmlsqParams.statement

Corrective Action:

"ERROR - ProcessDataMap Error Connection Failed" -Process Map Data Error

Example Message: The following Error occurred during the execution of the Transaction Flow QBItem2SFProd:2008-05-09 10:18:29.03 IW 2.4 TS QBItem2SFProd ERROR - ProcessDataMap Error Connection Failed --]

Corrective Action:

"ERROR - ProcessDataMap Error Connection Failed" -Connection timed out:

Example Message: The following Error occured during the execution of the Transaction Flow SFAcct2QBCust:
2009-02-07 01:12:54.829 IW 2.4 TS SFAcct2QBCust ERROR executeTransaction Connection timed out: connect Connection timed out: connect

Corrective Action:

"XmlSql.go Connection Failed" - a Connection error

Example Message: The following Connection Error occurred during the execution of the Transaction Flow QBCustInvoices2SFAcctOpp 2008-04-18 19:28:18.686 IW 2.4 TS QBCustInvoices2SFAcctOpp ERROR - XmlSql.go Connection Failed

Corrective Action:

"You have an error in your SQL syntax" - SQL Syntax error

Example Message: You have an error in your SQL syntax; check the manual that corresponds to your MySQL server version for the right syntax to use near 'ALEXANDRIA', lead.state='VA', lead.country=country.countryid, lead.zipcode='2231' at line 1

Corrective Action:

"ERROR - execute Transaction Connection reset" - Transaction Connection Reset error

Example Message: The following Error occurred during the execution of the Transaction Flow SFAcctOpp2QBCustSO:2008-05-09 00:34:17.896 IW 2.4 TS SFAcctOpp2QBCustSO ERROR - execute Transaction Connection reset

Corrective Action:

"ERROR - execute Transaction no protocol" - **No Protocol error**

Example Message: The following Connection Error occurred during the execution of the Transaction Flow SFAcctOpp2QBCustInv:2008-05-12 09:15:04.005 IW 2.4 TS SFAcctOpp2QBCustInv ERROR - execute Transaction no protocol:

Corrective Action:

"ERROR IWXsltcImpl.execute No more DTM IDs are available- **No DTM ID's available**

Example Message: The following Error occured during the execution of the Transaction Flow QBCustInvoices2SFAcctOpp:2009-02-06 13:17:58.048 IW 2.4 TS QBCustInvoices2SFAcctOpp ERROR IWXsltcImpl.execute No more DTM IDs are available

Description: Documented Bug in Xerses/Xalan xslt processor. When several invoices have 20 - 30 lines - this is when it happens.

Corrective Action: Some Quoteswill be created without products. The way around this is via utility flows.Customer must run a report (weekly or monthly) to find Quoteswithout products and then run utility flows for them.

Time Frame for correction: We are working on the problem in the background but with a very little progress so far. Other customers have this problem as well but they are bi-directional so their Quotesare already created in SF and this is really just a warning. .

"Scheduled CMS Lead to SF transaction flow was not executed" - Not running Utility Flows for Volume Loads error

Example Message: Scheduled CMS Lead to SF transaction flow was not executed at '2008-01-14 17:02:33.0' due to a big number of objects imported into CMS and skipped one interval. Utility flow was started to process objects within this interval.

Corrective Action:

3.1.15.3 Processing Errors

Below are a list of Processing Errors created by the integrated applications and InterWeave.

3.1.15.3.1 Quickbooks

Quickbooks Processing Errors below.

3.1.15.3.1.1 QODBC Issued Errors

QODBC is the Software Connector / Software Driver that **Inter**Weave connects to - and that Quickbooks connects to.

QODBC is OEM'd by Quickbooks - it is part of your Quickbooks installation if you have version 2006 and up.

InterWeave Error Code	QODBC Error Code	Explanation
	80040400	QuickBooks found an error when parsing the provided XML text stream.
	Action:	Contact QODBC support with a description of what was happening when you got this error
	80040401	Could not access QuickBooks.
	Action:	Perhaps the QuickBooks installation is not complete.
	80040402	Unexpected error. Check the qbsdklog.txt file for possible, additional information.
	Action:	Check the log specified for details.
	80040403	Could not open the specified QuickBooks company data file.
	Action:	Check that the QuickBooks version matches the version of the company data file.
	80040404	The version of QuickBooks currently running does not support qbXML.
	Action:	Check your QuickBooks version. All of our products support QuickBooks USA versions2009-2002, UK or Canadian 2009-2003. QuickBooks Pro, Premiere, Enterprise and Simple Start editions are supported. QuickBooks Online edition is supported.
	80040405	qbXML components have not been installed.
	Action:	Perhaps the QuickBooks installation is not complete.
	80040406	Could not determine the version of the QuickBooks company data file, or the data file has been modified and requires a newer version of QuickBooks.
	Action:	Perhaps the QuickBooks installation is not complete.
	80040407	The installation of QuickBooks appears to be incomplete. Please reinstall QuickBooks.
	Action:	Perhaps the QuickBooks installation is not complete.
	80040408	Could not start QuickBooks.
	Action:	Perhaps the QuickBooks installation is not complete.
	80040409	The current version of QuickBooks cannot work with the specified company data file.
	Action:	Check that the QuickBooks version matches the version of the company data file.
	8004040A	QuickBooks company data file is already open and it is different from the one requested.
	Explanation:	The QODBC Driver uses the QuickBooks SDK, which is limited to the features of the standard QuickBooks desktop product, which cannot open multiple company files. You must only open one company file at a time on a single machine.
	8004040B	Could not get the name of the current QuickBooks company data file.
	Action:	Check that the QuickBooks version matches the version of the company data file.

8004040C BeginSession method has not been called or it did not succeed.
Action: Contact QODBC support with a description of what was happening when you got this error

8004040D The ticket parameter is invalid.
Action: Contact QODBC support with a description of what was happening when you got this error.

8004040E There is not enough memory to complete the request.
Explanation: Check that your machine meets the memory requirements of QuickBooks.

8004040F The OpenConnection method has not been called.
Action: Contact QODBC support with a description of what was happening when you got this error.

80040410 The QuickBooks company data file is currently open in a mode other than the one specified by your application.
Explanation: The QODBC Driver uses the QuickBooks SDK, which is limited to the features of the standard QuickBooks desktop product, which cannot open multiple company files. You must only open one company file at once.

80040411 Before calling the BeginSession method, you must call the EndSession method to terminate the current session.
Action: Contact QODBC support with a description of what was happening when you got this error.

80040412 You cannot make multiple successive calls to the OpenConnection method. Call CloseConnection before calling OpenConnection again.
Action: Contact QODBC support with a description of what was happening when you got this error.

80040413 QuickBooks does not support the rollbackOnError value of the onError attribute.
Action: Contact QODBC support with a description of what was happening when you got this error.

80040414 A modal dialog box is showing in the QuickBooks user interface. Your application cannot access QuickBooks until the user dismisses the dialog box.
Action: Check the QuickBooks desktop application for the described condition.

80040415 A call to the OpenConnection method must include the name of your application.
Action: Contact QODBC support with a description of what was happening when you got this error.

80040416 If QuickBooks is not running, a call to the BeginSession method must include the name of the QuickBooks company data file.
Explanation: Make sure the DSN you are using includes the path to the company file you require, and that you have followed the security setup steps in our users manual.

80040417 If the QuickBooks company data file is not open, a call to the BeginSession method must include the name of the data file.
Explanation: Make sure the DSN you are using includes the path to the company file you require, and that you have followed the security setup steps in our users manual.

80040418 This application has not accessed this QuickBooks company data file before. Only the QuickBooks administrator can grant an application permission to access a QuickBooks company data file for the first time.
Explanation: Make sure that you have followed the security setup steps in our users manual.

80040419 This application's certificate is invalid. An application must have a valid certificate to access QuickBooks company data files.
Action: Contact QODBC support with a description of what was happening when you got this error.

8004041A This application does not have permission to access this QuickBooks company data file. The QuickBooks administrator can grant access permission through the Integrated Application preferences.
Explanation: Make sure that you have followed the security setup steps in our users manual.

8004041B Unable to lock the necessary information to allow this application to access this company data file. Try again later.
Explanation: A QuickBooks error, contact us if this happens frequently.

8004041C An internal QuickBooks error occurred while trying to access the QuickBooks company data file.
Explanation: A QuickBooks error, contact us if this happens frequently.

8004041D This application is not allowed to log into this QuickBooks company data file automatically. The QuickBooks administrator can grant permission for automatic login through the Integrated Application preferences.
Explanation: Make sure that you have followed the security setup steps in our users manual.

8004041E This application's certificate is expired. If you want to allow the application to log into QuickBooks automatically, log into QuickBooks and try again. Then click Allow Always when you are notified that the certificate has expired.
Explanation: Make sure that you have followed the security setup steps in our users manual.

8004041F QuickBooks Basic cannot accept XML requests. Another product in the QuickBooks line, such as QuickBooks Pro or Premiere, 2002 or later, is required.
Explanation: Check your QuickBooks version. All of our products support QuickBooks USA versions 2009-2002, UK or Canadian 2009-2003. QuickBooks Pro, Premiere, Enterprise and Simple Start editions are supported. QuickBooks Online edition is supported

80040420 The QuickBooks user has denied access.
Explanation: Check the security settings for the user in QuickBooks.

80040421 The returned text is passed via the qbXML COM Request Processor directly from QuickBooks to your application and is not issued by the qbXML COM Request Processor itself. You may find it useful to copy the text verbatim to your message window.

Action: Contact QODBC support with a description of what was happening when you got this error.

80040422 This application requires Single User file access mode and there is already another application sharing data with this QuickBooks company data file.
Explanation: A company file can only be open in one mode at a time. Certain operations require exclusive (single-user) mode, and can only be run when there are no other users of QuickBooks.

80040423 The version of qbXML that was requested is not supported or is unknown.
Explanation: Check your QuickBooks version. All of our products support QuickBooks USA versions 2009-2002, UK or Canadian 2009-2003. QuickBooks Pro, Premiere, Enterprise and Simple Start editions are supported. QuickBooks Online edition is supported.

80040424 QuickBooks did not finish its initialization. Please try again later.
Explanation: A QuickBooks warning, contact us if this happens frequently.

80040425 Invalid parameter.
Action: Contact QODBC support with a description of what was happening when you got this error.

80040426 Scripts are not allowed to call QBXMLRP.
Action: Contact QODBC support with a description of what was happening when you got this error.

80040427 Unregistered QuickBooks.
Action: Check your QuickBooks version. All of our products support QuickBooks USA versions 2009-2002, UK or Canadian 2009-2003. QuickBooks Pro, Premiere, Enterprise and Simple Start editions are supported. QuickBooks Online edition is supported.

80040428 The current request processor does not support the request.
Action: Contact QODBC support with a description of what was happening when you got this error.

80040429 The current message set is not supported.
Action: Contact QODBC support with a description of what was happening when you got this error.

8004042A Remote access is not allowed.
Action: Contact QODBC support with a description of what was happening when you got this error.

8004042B Unsupported interface.
Action: Contact QODBC support with a description of what was happening when you got this error

8004042C Certificate has been revoked.
Action: Contact QODBC support with a description of what was happening when you got this error.

RDS Client Errors:

80040402 Remote QuickBooks access failed unexpectedly.
Explanation: Make sure you are using the web or remote version of QODBC, and contact QODBC support with a description of what was happening when you got this error.

80040407 Error retrieving the QuickBooks remote server name and port.
Explanation: Make sure you are using the web or remote version of QODBC, and contact QODBC support with a description of what was happening when you got this error.

8004040D Remote QuickBooks access failed because the remote server name and/or port have changed.
Explanation: Make sure you are using the web or remote version of QODBC, and contact QODBC support with a description of what was happening when you got this error.

80040414 A modal dialog box is showing in the QuickBooks Remote Data Sharing Client user interface. The application cannot access QuickBooks until the dialog is dismissed.
Explanation: A QuickBooks error, contact us if this happens frequently.

8004041A Remote QuickBooks access failed because login and/or password do not match those on the server.
Explanation: Check the security settings in the QODBC setup screen.

RDS Server Errors:

80040420 The user has denied remote access to QuickBooks.

Explanation: Make sure you are using the web or remote version of QODBC, and contact QODBC support with a description of what was happening when you got this error.

80040421 Unable to establish a remote connection to QuickBooks.

Explanation: Make sure you are using the web or remote version of QODBC, and contact QODBC support with a description of what was happening when you got this error.

3.1.15.3.1.2 Quickbooks Errors

The following are Quickbooks Errors - generated by Quickbooks.

QB Error Code	Description	OB Internet Address to Locate QB Errors
h200 Series Error		
Errors: "H101," "H202," "H303," and "H505"	When opening a company file in multi-user mode, an error occurs indicating one of the following:	http://support.quickbooks.intuit.com/support/pages//KnowledgeBaseArticles/1005295
6000 Series Errors with Text		
Error -6190, -83	"QuickBooks was unable to open the company file."	http://support.quickbooks.intuit.com/support/pages//KnowledgeBaseArticles/1007857
Error 6189	"QuickBooks is unable to determine the cause of the error on the local file" when opening the company file	http://support.quickbooks.intuit.com/support/pages//KnowledgeBaseArticles/1003293
Error -6177, 0	"QuickBooks is attempting to open this Company file."	http://support.quickbooks.intuit.com/support/pages//KnowledgeBaseArticles/192a1556
Error -6190, -82	"QuickBooks was unable to open the file [path\filename] on the host" when opening a file on a Windows Server	http://support.quickbooks.intuit.com/support/pages//KnowledgeBaseArticles/1008500
Error -6000, -301	"An error occurred when QuickBooks tried to access the company file"	http://support.quickbooks.intuit.com/support/pages//KnowledgeBaseArticles/1000464
Error -6000, -83	"An error occurred when QuickBooks tried to access the company file"	http://support.quickbooks.intuit.com/support/pages//KnowledgeBaseArticles/1001970
Error -6123, 0	"Connection to the QuickBooks company file has been lost" when opening a company file stored on another computer	http://support.quickbooks.intuit.com/support/pages//KnowledgeBaseArticles/1000677
6000 Errors with no text		

Errors: "-6189, -82" and "-6000, -301"	"-6189, -82" and "-6000, -301" when opening company file on network attached storage (NAS) or USB drive	http://support.quickbooks.intuit.com/support/pages//KnowledgeBaseArticles/1009399
Error [-6123, 0]	occurs when opening QuickBooks in multi-user mode	http://support.quickbooks.intuit.com/support/pages//KnowledgeBaseArticles/1002928
Error: "-6189, -82"	when opening QuickBooks	http://support.quickbooks.intuit.com/support/pages//KnowledgeBaseArticles/1002590
1000 Series Errors		
Error 1335	"The cabinet file [data1.cab] required for this installation is corrupt and cannot be used" or "The cabinet file [2] required for this installation cannot be used."	http://support.quickbooks.intuit.com/support/pages//KnowledgeBaseArticles/373510
Error 1328	"1328" sometimes followed by Error: "1603" when installing an update	http://support.quickbooks.intuit.com/support/pages//KnowledgeBaseArticles/1009215
Error 1327	"The drive [drive letter] is invalid"	http://support.quickbooks.intuit.com/support/pages//KnowledgeBaseArticles/ca9a9910
Error 1334	"The file [filename] cannot be installed because it cannot be found in the cabinet file [filename]."	http://support.quickbooks.intuit.com/support/pages//KnowledgeBaseArticles/8eed39d4
Error 1321	"The Installer has insufficient privileges to modify the file [2]"	http://support.quickbooks.intuit.com/support/pages//KnowledgeBaseArticles/1000286
Error 1311	"Source file not found (filename). Verify that the file exists and that you can access it."	http://support.quickbooks.intuit.com/support/pages//KnowledgeBaseArticles/1000285
Error 1303	"Installer has insufficient privileges to access this directory. [path to directory]"	http://support.quickbooks.intuit.com/support/pages//KnowledgeBaseArticles/1003307
Error 1328	"Error when applying patch to file"	http://support.quickbooks.intuit.com/support/pages//KnowledgeBaseArticles/1000665
Error numbers greater than 10,000		

Error 15240	"HRESULT XXXXX The payroll update did not complete successfully" or "HRESULT XXXXX The QuickBooks update did not complete successfully"	http://support.quickbooks.intuit.com/support/pages//KnowledgeBaseArticles/68a2e94e
Error 15270	"The update did not complete successfully. The update is missing a file."	http://support.quickbooks.intuit.com/support/pages//KnowledgeBaseArticles/69a5663a
Errors: "15103, 15104, 15105, 15106, and 15107"	"15103, 15104, 15105, 15106, and 15107" when installing an update	http://support.quickbooks.intuit.com/support/pages//KnowledgeBaseArticles/76c0a48f
Error 99937	"Connection Lost" when opening a company file stored on a Novell Netware Server	http://support.quickbooks.intuit.com/support/pages//KnowledgeBaseArticles/56343a2b
Error: 80070057	"80070057 the parameter is incorrect" and "You do not have sufficient permissions to delete files..."	http://support.quickbooks.intuit.com/support/pages//KnowledgeBaseArticles/1004251
Error 16026	when downloading an update	http://support.quickbooks.intuit.com/support/pages//KnowledgeBaseArticles/1005703
Errors: 12002, 12007, 12009, 12029, or 12031	when updating QuickBooks	http://support.quickbooks.intuit.com/support/pages//KnowledgeBaseArticles/202736

Data Integrity

Error C=342	When attempting to open a company file	http://support.quickbooks.intuit.com/support/pages//KnowledgeBaseArticles/1005549

3.1.15.3.2 SugarCRM

Refer toSugarCRM

3.1.15.3.3 Scout Inventory Management

Refer to Scout Inventory Management

3.1.15.3.4 InterWeave

refer to InterWeave

Section IV

4 Integration Manager Process Guide

Integration Manager Process Guide - General Overview

The Transaction Flow ID's correspond to the transaction definitions that you have configured. Clicking on the transaction will open up a properties page at the bottom of the screen where login credentials, data set names, drivers, order numbers and Solutions numbers can be set for a transaction prior to running it. All transaction properties must be set correctly before running the transaction.

Generally, the default settings should suffice for any given transaction. Only order number or Solutions number ranges should be changed by the user without a **Smart** Solutions Specialist assistance. Change the property and click SUBMIT. The properties are now set.

To change the transaction's run time behavior (start/stop, setting up scheduled or single run, interval between starts, shift (time lag between transaction start and execution), Query Start time, and Page counter, simply select the option or enter the value and click SUBMIT.

4.1 MRC SugarCRM_Quickbooks Solution

See detail areas below.

4.1.1 User Creation and Receipt of Token

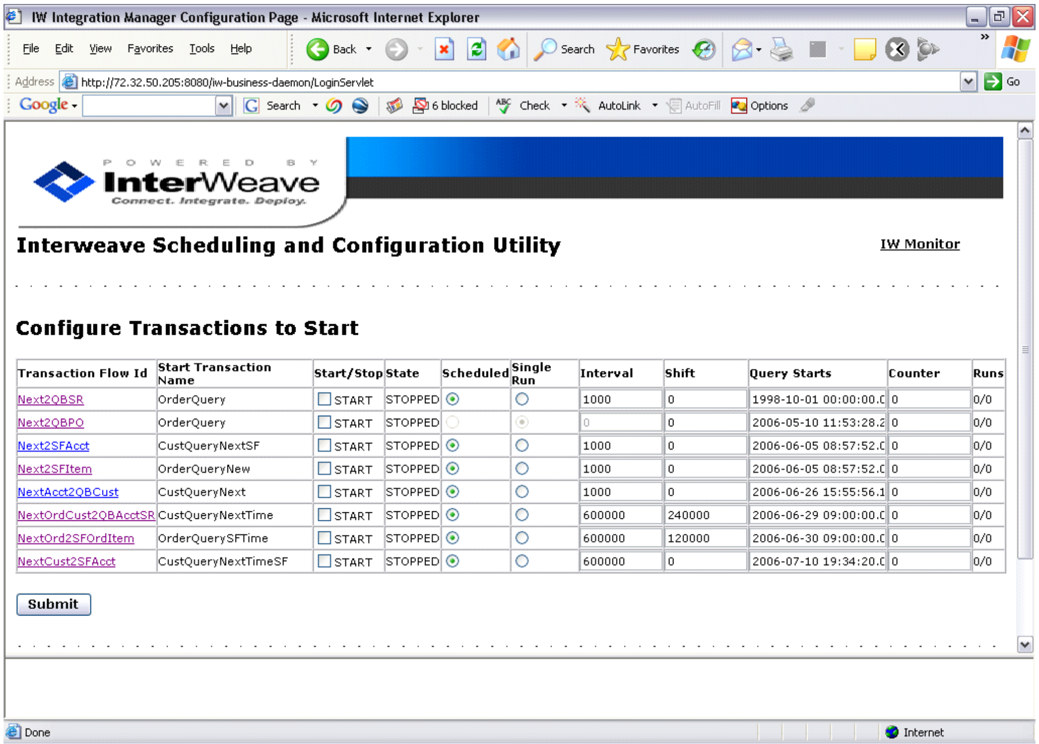
(Under Build)

4.1.2 Setting and Scheduling your Transactions

Setting and Scheduling your transactions using the Integration Manager

Executing your transactions is done through the **MRC SugarCRM** Solutions Portal which launches after you login to the **MRC SugarCRM** Solutions Portal. After you have completed your initial configuration and logged in – your Flows will appear in the Integration Manager.

Logging In: Select “Secure Portal Login” at www.interweave.biz. This will bring you to the InterWeave Solutions Portal. Enter your email and password and a page similar to the one above will load:



General Overview: The Transaction Flow ID's correspond to the transaction definitions that you have configured. Clicking on the transaction will open up a properties page at the bottom of the screen where login credentials, data set names, drivers, order numbers and Solutions numbers can be set for a transaction prior to running it. All transaction properties must be set correctly before running the transaction. Generally, the default settings should suffice for any given transaction. Only order number or Solutions number ranges should be changed by the user without an **Inter**Weave Solutions Specialist assistance. Change the property and click SUBMIT. The properties are now set. To change the transaction's run time behavior (start/stop, setting up scheduled or single run, interval between starts, shift (time lag between transaction start and execution), Query Start time, and Page counter, simply select the option or enter the value and click SUBMIT.

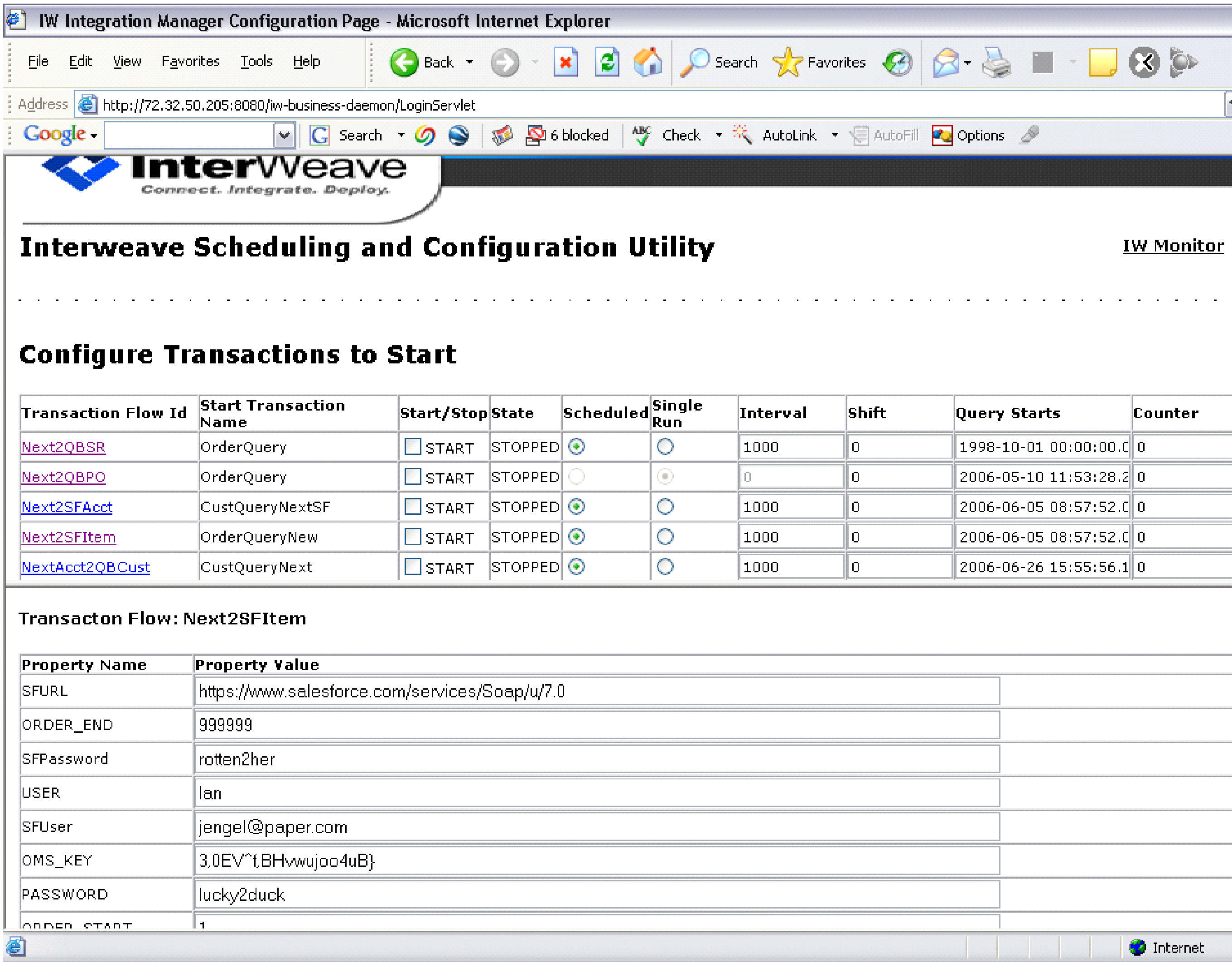
4.1.3 Managing your Transactions

Setting up a Transaction

To setup your transaction, enter a date and time in the Query Starts column (You must enter a start time in the Query Starts column, in the following format (yyyy-mm-dd hh:mm:ss.s.), set the counter to '1', enter an interval value in milliseconds (60000 milliseconds equals one minute), and enter a shift in milliseconds if desired.

Shift means the length of time the system will wait before starting the transaction. For example a shift value of 120000 will instruct the system to wait for 2 minutes after the start command is given before processing the transaction. This is useful when you have several dependent transactions running in scheduled mode and need to run one or more transactions before others.

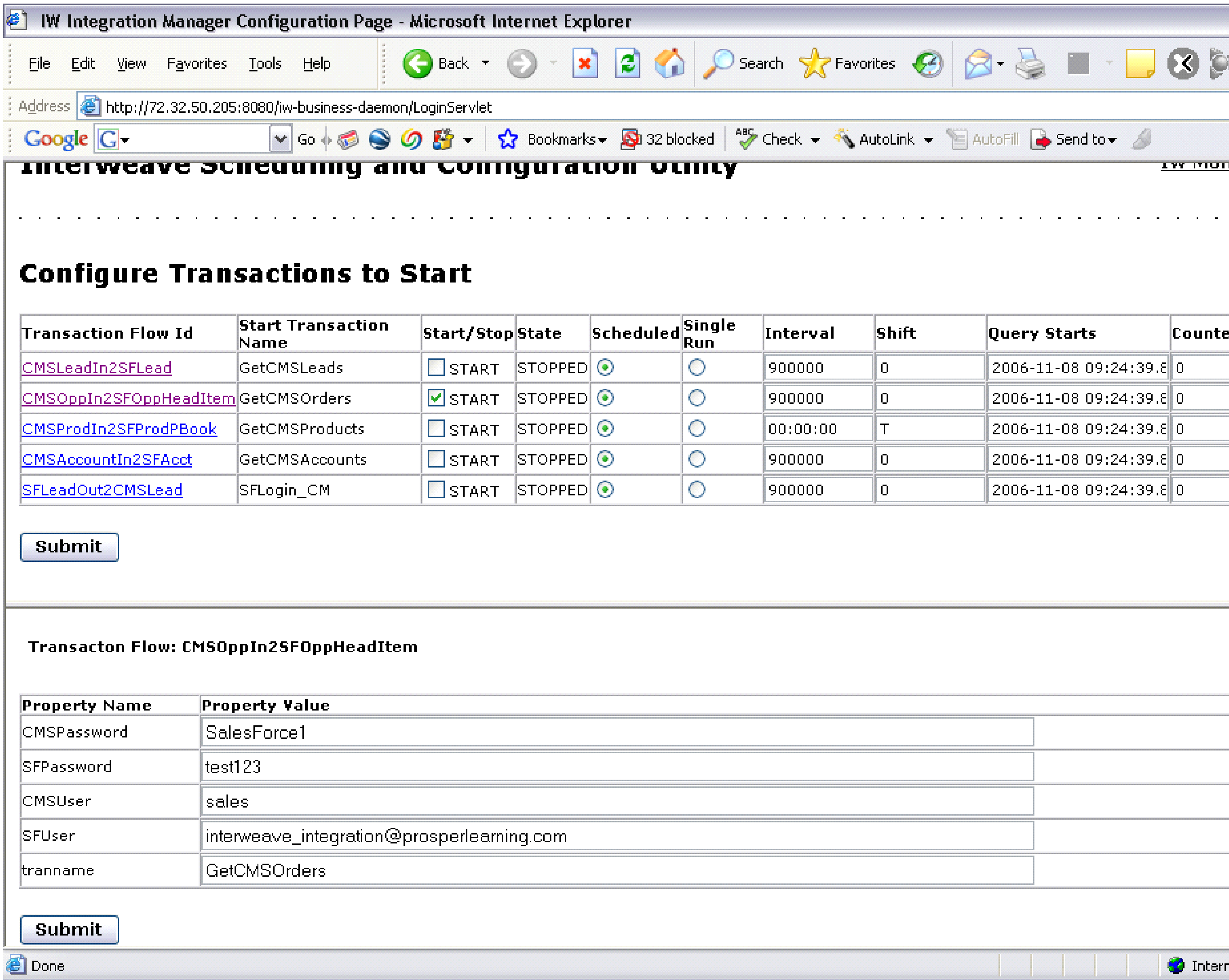
After entering your values, select the START checkbox and click 'SUBMIT'.



Changing a Transaction

In the example below, the shift was changed from 0 to 1000 milliseconds, and the counter was set to ‘1’. By selecting Start and clicking SUBMIT, the Next2SFItem transaction will run in scheduled mode for orders between 1 and 999999 , with a 1 second interval between transaction starts and a shift or lag of 1 second after the transaction starts.

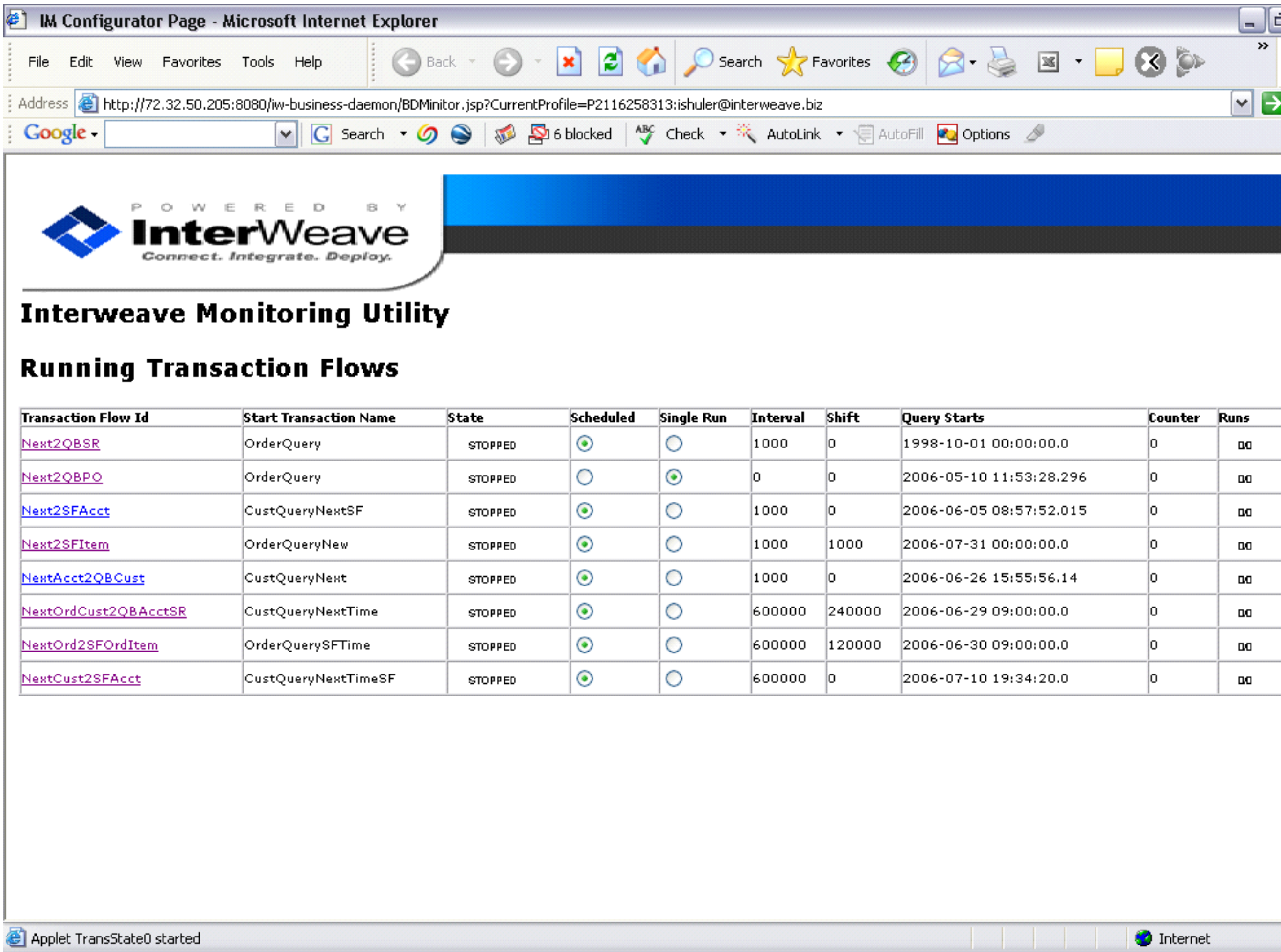
To change the properties of a running transaction you must first shut it down then change the properties. Transactions with a value in the Shift column must first “wake-up” from their wait mode then run. After the transaction has finished, you can then re-start it with the new parameters.



Monitoring your Transactions

If you wish to see the status of transaction initiated from your login profile, select the IW Monitor link in the top right-hand corner of the screen. A new window will open and you will see the status of all transactions assigned to you and that you have initiated. If you did not start a transaction, all statuses will be shown as stopped.

The IW Monitor screen looks like the one above. You can check this screen prior to stopping or altering any of the transactions you have access to.



4.2 SugarCRM to Quickbooks Transactions

Enter topic text here.

4.2.1 MRC SugarCRM Transaction Definition and Execution Overview

MRC SugarCRM Transaction Definition and Execution Overview for Customer

The Customers solution contains 10 primary transaction flows. This document provides the transaction definition, execution process and best practice recommendations for those transaction flows.

There are two types of Flows; Scheduled and Utility. Flows typically are at object level, i.e. Sugar Account to QB Solutions, or SF Quote to QB Invoice. In the Utility category, we have additional sub-categories by Name, Full Name or Date Range.

We also have additional flows; ex. ETL or Bulk Load flows – these are specialized flows and will be discussed in a later document. Below is a description of both the Utility and Scheduled flows Customer is using. If at any time you have a question as to what flow sequence should be, setting of scheduled transaction timings or running a “catch-up” flow by date, please do no hesitate to contact a MRC

SugarCRM Support Specialist at support@MRC.com or at one of our contact numbers.

During the initial test phase only column three flows should be run – Utility Flows (One object by Name or Full Name). These are organized uni-directional for test purposes.

Flow Category	Customer Scheduled Flows	Utility Flows (One Object by Name or Full Name)	Utility Flows (Batch of Objects by Date Range)
Sugar to QB Flows			
Accounts		SugAcct2QBCustN	SugAcct2QBCustDR
Quotes	SugAcctOpp2QBCustInv	SugOpp2QBInvN	SugOpp2QBInvDR
QB to Sugar Flows			
Solutions		QBCust2SugAcctNF	QBCust2SugAcctDR
Invoices	QBCustInvoices2SugAcctOpp	QBInvoices2SugAcctOppN	QBInvoices2SugAcctOppDR
IT Reserved Flows	SugAcct2QBCustBind	SugAcct2QBCustBindN	
Disabled Flows	((SugAcctOppQBCustInv))	((QBCust2SugAcctN))	

4.2.1.1 Utility Transactions

Utility Transactions

Customer's Utility Transactions (Name of Full Name) are based on Sugar Account/Quote and QB Solutions/Invoice fields.

Name Utility Transactions

SugAcct2QBCustN **Creates new and updates existing Customers in QB from Sugar Accounts based on (the Name entered) or the primary/secondary keys selected in the ISP user configurations.**

Description: This flow will query Sugar Accounts based on the single Sugar Account ID (or Name) entered in the Integration Manager Console for insertion or updating into QB. This transaction is used for manual record synchronization as a test vehicle for format of configuration changes or as a result of record rejection in QB due to data problems, etc.

Best Practices: Not applicable – testing run.

SugOpp2QBInvN — **Creates new and updates existing Invoices in QB from Sugar Quotesbased on (the Name entered) or the primary/secondary keys selected in the ISP user configurations.**

Description: This flow will query Sugar Quotesbased on the single Sugar Quote ID (or Name) entered in the Integration Manager Console for insertion or updating into QB. This transaction is used for manual record synchronization as a test vehicle for format of configuration changes or as a result of record rejection in QB due to data problems, etc.

Best Practices: Not applicable – testing run.

QBCust2SugAcctNF — **Creates new and updates existing Sugar Accounts from Customers in QB from based on (the Full Name entered) or the primary/ secondary keys selected in the ISP user configurations.**

Description: This flow will query QB Solutions based on the single Sugar Account ID (or Full Name) entered in the Integration Manager Console for insertion or updating into Sugar Accounts. This transaction is used for manual record synchronization as a test vehicle for format of configuration changes or as a result of record rejection in Sugar due to data problems, etc.

Best Practices: Not applicable – testing run.

QBInvoices2SugAcctOppN — **Creates new and updates existing Sugar Accounts/Quotesfrom Invoices in QB based (the Name entered) and on the primary/ secondary keys selected in the ISP user configurations.**

Description: This flow will query QB Invoices based on the single QB Invoice ID (or Name) entered in the Integration Manager Console for insertion or updating into Sugar Accounts and Quotes. This transaction is used for manual record synchronization as a test vehicle for format of configuration changes or as a result of record rejection in Sugar due to data problems, etc.

Best Practices: Not applicable – testing run.

4.2.1.2 Scheduled Transactions

Scheduled Transactions

There are 2 scheduled transaction flows: SugAcctOpp2QBCustInv and QBCustInvoices2SugAcctOpp.

Currently, these 2 transaction flows run every 10 minutes as a default setting in the Integration Manager. Access to the Integration Manager is by pointing your browser to: www.MRC.com and then selecting Secure Portal Login and entering your credentials.

These flows provide the near-time synchronization of data between SugarCRM.com (Sug) and the Solutions QuickBooks (QB). The descriptions are as follows:

SugAcctOpp2QBCustInv — **Creates new and updates existing Customers and Invoices in QB from Sugar Accounts and Quotesbased on the primary/ secondary keys selected and configuration selections in the ISP.**

This transaction flow executes 2 queries against QB every ten minutes and populates QB with the results.

An Sugar Account query is run to look for new and modified Account records. If found, these records are inserted into QB as new Customers, or if they already exist, are updated with new information. The query is based on the Last Updated Date/Time value the Sugar Account records hold. All Account records whose last updated date/time is less than or equal to the time the transaction starts are captured for processing.

An Quote query is also run using the same criteria as the Account query, last update date/time. Records returned from the Quote query are inserted into QB as an Invoice or updates to existing Invoice record.

Best Practices: As stated above, this is a scheduled transaction executing 4 operations (2 in Sugar, 2 in QB) every 10 minutes. In the event this transaction/connection stops in SugarCRM.com, the Integration Manager at Rackspace or the Solutions Quickbooks, the transaction will need to be re-started from the time showing in the Query Starts column of the Integration Manager for this Flow. This date/time value should never be greater than 12 hours earlier than the current time. If there is a need to capture records for a period of time greater than 12 hours, the Bulk/ETL transactions should be used as the volume of data will exceed the threshold this transaction was designed for.

In general, scheduled transactions are not to be altered or restarted unless absolutely required due to system or transaction failure or stoppage.

This flow provides the near-time synchronization of data between the Solutions QuickBooks (QB) and SugarCRM.com (Sug). The descriptions are as follows:

QBCustInvoices2SugAcct Opp	**Creates new and updates existing Accounts and Quotesin Sugar from Customers and Invoices in Quickbooks based on the primary/secondary keys selected and configuration selections in the ISP.**

This transaction flow executes 2 queries against QB every ten minutes and populates Sug with the results.

A QB Solutions query is run to look for new and modified Solutions records. If found, these records are inserted into Sug as new Accounts, or if they already exist, are updated with new information. The query is based on the Last Updated Date/Time value the QB Solutions records hold. All Solutions records whose last updated date/time is less than or equal to the time the transaction starts are captured for processing.

An Invoice query is also run using the same criteria as the Solutions query, last update date/time. Records returned from the Invoice query are inserted into Sug as an Quote or updates to existing Quote record.

Best Practices: As stated above, this is a scheduled transaction executing 4 operations (2 in QB, 2 in Sugar) every 10 minutes. In the event this transaction/connection stops in SugarCRM.com, the Integration Manager at Rackspace or the Solutions Quickbooks, the transaction will need to be re-started from the time showing in the Query Starts column of the Integration Manager for this Flow. This date/time value should never be greater than 12 hours earlier than the current time. If there is a need to capture records for a period of time greater than 12 hours, the Bulk/ETL transactions should be used as the volume of data will exceed the threshold this transaction was designed for.

In general, scheduled transactions are not to be altered or restarted unless absolutely required due to system or transaction failure or stoppage.

4.2.1.3 Date Range Utility Transactions

Date Range Utility Transactions

SugAcct2QBCustDR	**Creates new and updates existing Customers in QB from Sugar Accounts based on (the Date Range) and the primary/secondary keys selected in the ISP user configurations.**

Description: This flow will query Sugar Accounts based on the Date Range entered in the Integration Manager Console for insertion or updating into QB. This transaction is used for manual record synchronization as a test vehicle for format of configuration changes or as a result of record rejection in QB due to data problems, etc.

Best Practices: Not applicable – testing run.

SugOpp2QBInvDR	**Creates new and updates existing Invoices in QB from Sugar Quotesbased on (the Date Range) and the primary/secondary keys selected in the ISP user configurations.**

Description: This flow will query Sugar Quoteson the Date Range entered in the Integration Manager Console for insertion or updating into QB. This transaction is used for manual record synchronization as a test vehicle for format of configuration changes or as a result of record rejection in QB due to data problems, etc.

Best Practices: Not applicable – testing run.

QBCust2SugAcctDR	**Creates new and updates existing Sugar Accounts from Customers in QB from based on (the Date Range) and the primary/secondary keys selected in the ISP user configurations.**

Description: This flow will query QB Solutions on the Date Range entered in the Integration Manager Console for insertion or updating into Sugar Accounts. This transaction is used for manual record synchronization as a test vehicle for format of configuration changes or as a result of record rejection in Sugar due to data problems, etc.

Best Practices: Not applicable – testing run.

QBInvoices2SugAcctOpp DR	**Creates new and updates existing Sugar Accounts/Quotesfrom Invoices in from QB based on (the Date Range) and the primary/ secondary keys selected in the ISP user configurations.**

Description: This flow will query QB Invoices on the Date Range entered in the Integration Manager Console for insertion or updating into Sugar Accounts and Quotes. This transaction is used for manual record synchronization as a test vehicle for format of configuration changes or as a result of record rejection in Sugar due to data problems, etc.

Best Practices: Not applicable – testing run.

Endnotes 2... (after index)

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