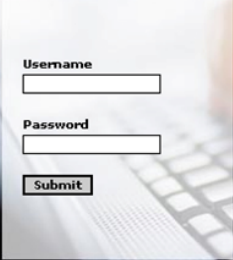




New User? Please [register here](#) New Company? Please [register here](#)



Username

Password

[Change Password](#)
[Edit Profile](#)
[Change Company Password](#)
[Edit Company Profile](#)

Return to Home Page
www.interweave.biz

The form is a login interface overlaid on a background image of hands typing on a laptop keyboard. It includes fields for 'Username' and 'Password', a 'Submit' button, and several links for account management and navigation.

Powered by  InterWeave

InterWeave Solutions Portal Help & Training Guide

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InterWeave Solutions Portal

Help & Training Guide

by Integration Technologies, Inc.

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

InterWeave Solutions Portal Help & Training Guide

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Printed: December 2009

Publisher

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Special thanks to:

Special thanks to Dmytro Zotkin and Inna Levytska, who without their help, this product would not be available.

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Foreword

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

Section

I

1 Introduction to The InterWeave Help & Training Guide

Welcome to the award-winning, **InterWeave**, the on-demand service designed for you to manage your Solutions, 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 Platform

The **InterWeave Smart Solutions** platform is the first Platform as a Service (PaaS), 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 Salesforce service includes the following components:

Salesforce Applications

Salesforce includes prebuilt applications for customer relationship management (CRM) ranging from sales force automation to partner relationship management, marketing, and customer service.

Force.com Platform

The Force.com platform is the first Platform as a Service (PaaS), enabling developers to create and deliver any kind of business application, entirely on-demand and without software. The platform also includes easy-to-use, point-and-click customization tools to help you create solutions for your unique business requirements, without any programming experience.

Force.com AppExchange

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

Salesforce.com Community Services

Salesforce.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 Help & Training Guide

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

The InterWeave Smart Solutions Help & Training window 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 **InterWeave**, 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 **InterWeave**.

Review Documentation for Force.com Developers

If you are building a Solution on the **InterWeave Smart** Solutions platform, see Documentation Resources for **InterWeave 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 **InterWeave**.

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 **InterWeave** Customer Support. Click View Cases to see your previously submitted cases.

To contact **InterWeave** 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, **InterWeave 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 Solutions 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 **InterWeave 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 **InterWeave** IDE to develop, maintain and extend their Solutions. All options take advantage of the benefits realized with **InterWeave** 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

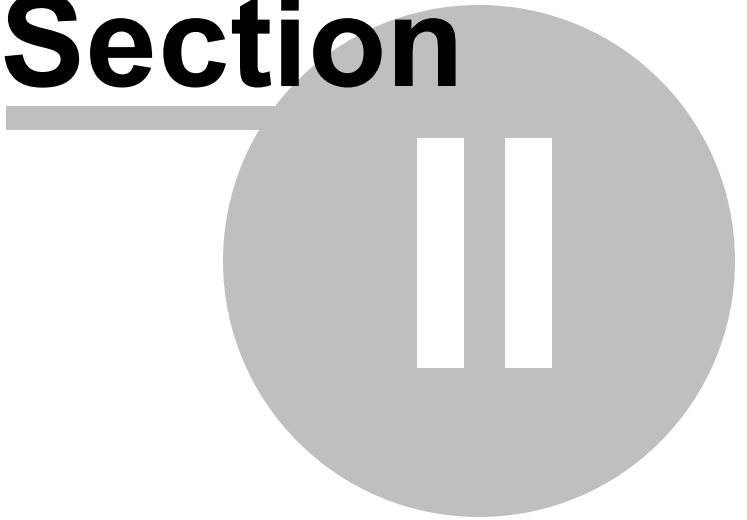
Regional Office: Canada

3300 Bloor Street, West, Suite 3140
Toronto, ON, CANADA, M8X 2X3
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



2 Welcome to the InterWeave Solutions Portal

Welcome to InterWeave Smart Solutions®

Customers today are looking for Solutions that meet their specific requirements and provide them unlimited flexibility. At Integration Technologies, **InterWeave 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

InterWeave 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 > our customers < 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

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 Salesforce.com to Quickbooks, ACCPAC, MS Great Plains, Oracle, MAS, or On-Demand Billing to eCommerce, ERP, Databases or Web Services - **InterWeave** has the configurable Solutions for you.

Salesforce to Financial

- Quickbooks
- MAS 90/200
- Sage ACCPAC
- Peachtree
- Oracle
- MS Great Plains, Navision

Salesforce to ERP

- Ascent (by Presciso Business Systems)

Salesforce to Billing

- Aria On-Demand Billing

Salesforce to eCommerce

- Nexternal
- Merkatis

Salesforce to Customer Service

- HelpSteam Customer Service

Salesforce to Telephony

- Contactual
- LDAP Native

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

2.1.1 Salesforce_Quickbooks

Smart Solution Set Up and Testing

The main customer portal login is located at www.interweave.biz – select “**Secure Portal Login**” on the main title bar. Your **Smart Solutions Technical Specialist** will work with you to execute the steps below:

Step 1 – Create custom fields in Salesforce and Quickbooks

- Customize/update SalesForce with 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 – Registration & Solution Configuration on the InterWeave 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 **InterWeave Technical Specialist**
 - This takes about 30 to 45 minutes

Step 3 – Connectivity Set Up

- If you are connecting to Quickbooks Online - see the first section in Step 3
- If your connecting to your Quickbooks Company file on a server, see instructions below and in Step 3

- Install connector, configure firewall
- Ensure QB 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 4 – Activation of Flows and Testing

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

SF Object Testing:

- Account Testing
- Sales order testing (tbd)
- Invoice testing (tbd)
- Products/Items testing (tbd)

Step 5 – Binding and Production

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

2.1.1.1 Step 1 - Create custom fields in Salesforce and Quickbooks

Salesforce Custom Fields

Mandatory

At a minimum, we need two new custom fields for Accounts, one field for Opportunities and one field for Products to be added in SalesForce as soon as possible. They will help with bi-directional flows as well as speed up operations and ensure better linkage between SalesForce objects and QuickBooks records.

Account Record

Go to "**Setup**" in SalesForce, 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**".

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".

Opportunity Record

Click on the left side-bar click on "Opportunity", 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**".

Product Record

Finally, 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**".

Additional Fields relating to your Configuration Selections

In SalesForce

1. Contact Object

- a. If your primary contact for an account is determined by a contact-level custom field, we need a custom field with API name of “**Level__c**” of type *Picklist* with following possible 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:

| | |
|--------------------|---------------|
| Curr_Bal_Pymts__c | Currency(9,2) |
| Acc_Recv_Over30__c | Currency(9,2) |
| Acc_Recv_Over60__c | Currency(9,2) |
| Recv_Over90__c | Currency(9,2) |

- b. We need the following fields to be accessible by integration user (below are field names, not labels):

- AccountNumber
- Description
- Fax
- NumberOfEmployees
- ParentId
- Phone
- Rating
- Type
- Website

- c. We always need a custom field with API name of “**Active__c**” – picklist with two values “Yes” and “No”
- d. If your primary contact for an account is determined by contact lookup in account, we need a custom field with API name of “**Primary_Contact__c**” of type *Lookup (Contact)*
- e. If you want to use payment method and credit card information in your accounts, we need custom fields with the following API names:

| | |
|-----------------------------|---------------|
| Preferred_Payment_Method__c | Text(210) |
| Credit_Card_Number__c | Text(210) |
| Expiration_Month__c | Text(210) |
| Expiration_Year__c | Text(210) |
| Name_On_Card__c | Text(210) |
| Credit_Card_Address__c | Text(210) |
| Credit_Card_Postal_Code__c | Text(210) |
| Auto-Charge Authorized__c | Picklist |
| Gross Monthly Charge__c | Currency(9,2) |
| Credit Card # Client__c | Text(210) |

| | |
|---------------------------------|----------|
| CC Exp. Date (00/00) __c | Text(5) |
| ACH__c | Checkbox |
| Last Authorized Payment Date__c | Date |

3. Opportunity Object

- a. If Transaction number is generated in SF, the custom field that stores the QuickBooks Transaction Number needs to be auto-numbered and unique
- b. If you are including primary contact lookup for opportunities, we need a custom field with API name of “**Primary_Contact__c**” of type *Lookup (Contact)*
- c. If you are using custom billing and shipping address fields in your opportunities, we expect them to have the corresponding API names:
 - Billing_Status__c
 - Billing_FirstName__c
 - Billing_LastName__c
 - Billing_Company_Street__c
 - Billing_City__c
 - Billing_State__c
 - Billing_Postal_Code__c
 - Billing_Country__c
 - Billing_PhoneNumber__c
 - Shipping_FirstName__c
 - Shipping_LastName__c
 - Shipping_Company_Street__c
 - Shipping_City__c
 - Shipping_State__c
 - Shipping_Postal_Code__c
 - Shipping_Country__c
 - Shipping_PhoneNumber__c

4. Product Object

- a. If you answered “**Yes**” on the setting “Salesforce Support for Inventory items cost required” then you need to create two custom fields in the Product Object for Item Cost and Vendor. Their API names should be:
 - Unit_Cost__c
 - Vendor__c
- b. If you answered “**Yes**” on the setting “Salesforce Support for Item weight required” then you need to create custom field in the Product Object for Item Weight. The API name should be:
 - Weight__c

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 Salesforce 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 “SF 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 - Registration & Solution Configuration

Register

The first step is to Register and Configure yourself and your company in the **InterWeave Solutions Portal (ISP)**.

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. Salesforce to Quickbooks)

With the assistance of your **InterWeave 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 Salesforce as you wish – which correlate to Quickbooks fields – and enter them into your Configuration options.

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

InterWeave Solutions Portal Profile

Some of the options you've specified for your Solution in the **InterWeave Solutions Portal (ISP)** configuration may require presence of specific custom fields in Salesforce 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

ISP 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 Salesforce 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).

2.1.1.3 Step 3 - Connectivity Set Up

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

The Connector

The connector is a very small piece of software that allows **InterWeave** 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 QuickBooks installed.
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.

Ensuring Connectivity for InterWeave Servers

Most companies' servers are behind a so-called "firewall" or similar devices that block external access to

improve security. For **InterWeave** to work, your firewall needs to allow inbound connections to your QuickBooks computer from IP addresses:

| | |
|---------------|----------------|
| 72.3.142.149 | 67.192.84.146 |
| 74.205.126.77 | 71.235.4.1 |
| 72.32.50.205 | 99.232.241.169 |

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)

2.1.1.4 Step 4 - Activation of Flows and Testing

Receiving your Email

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

1. Your **InterWeave** company name is: [Company Name Here]
2. Your company token is: [Token issued by **InterWeave** 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 Salesforce 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 **InterWeave** Solutions Portal (ISP). 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

InterWeave 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 ISP. 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.

The screenshot displays the InterWeave Scheduling and Configuration Utility interface. At the top, there are navigation links for "Flow Assignment", "List Users", "Save", and "Restore". Below this, the "DB Driver" configuration section is visible, with fields for DB Driver (com.mysql.jdbc.Driver), DB DSN (jdbc:mysql://127.0.0.1:3306/hostedprofiles), DB User (ishull), and DB Password (masked). The main section is titled "Configure Transactions to Start" and contains a table with the following columns: Transaction Flow Id, Start Transaction Name, Start/Stop/State, Scheduled Single Run, Interval, Shift, Query Starts, Counter, Run Profile, and Ki. The table lists various transactions such as GetQueryNextTime, GetQueryNextTimeAcc, GetQueryNextTimeAcc, GetCPSLeadsCount, GetCPSOppsCount, GetCPSProductCount, GetCPSAssessCount, SPLogin_CH, GetLimits, GetLimits, and GetLimits. The first four rows are highlighted in green, indicating they are selected or running.

| Transaction Flow Id | Start Transaction Name | Start/Stop/State | Scheduled Single Run | Interval | Shift | Query Starts | Counter | Run Profile | Ki |
|---------------------|------------------------|------------------|----------------------|----------|--------|-----------------------|---------|--|----|
| GetQueryNextTime | GetQueryNextTime | START STOPPED | 00:00:00 | 120000 | Y | 2007-03-28 22:34:33.0 | 200 | P1237561701:rpembrook@simplehrutha.com | 0 |
| GetQueryNextTime | GetQueryNextTime | START STOPPED | 00:00:00 | 120000 | Y | 2007-03-28 22:34:33.0 | 200 | P1237561701:rpembrook@simplehrutha.com | 0 |
| GetQueryNextTime | GetQueryNextTime | START STOPPED | 00:00:00 | 120000 | Y | 2007-03-28 22:34:33.0 | 200 | P1237561701:rpembrook@simplehrutha.com | 0 |
| GetCPSLeadsCount | GetCPSLeadsCount | START STOPPED | 00:00:00 | 180000 | Y | 2007-03-29 09:39:40.0 | 0 | P34725716:un@prospelearning.com | 0 |
| GetCPSOppsCount | GetCPSOppsCount | START STOPPED | 00:00:00 | 600000 | 40000 | 2007-03-18 19:34:17.0 | 0 | P34725716:un@prospelearning.com | 0 |
| GetCPSProductCount | GetCPSProductCount | START STOPPED | 00:00:00 | 180000 | Y | 2007-03-28 22:34:33.0 | 10 | P34725716:un@prospelearning.com | 0 |
| GetCPSAssessCount | GetCPSAssessCount | START STOPPED | 00:00:00 | 180000 | 120000 | 2007-03-28 22:34:33.0 | 1000 | P34725716:un@prospelearning.com | 0 |
| SPLogin_CH | SPLogin_CH | START STOPPED | 00:00:00 | 180000 | 120000 | 2007-03-02 21:49:59.0 | 0 | P34725716:un@prospelearning.com | 0 |
| GetLimits | GetLimits | START STOPPED | 00:00:00 | 10 | 0 | 2006-11-08 09:24:39.0 | 0 | P34725716:un@prospelearning.com | 0 |
| GetLimits | GetLimits | START STOPPED | 00:00:00 | 10 | 0 | 2006-11-08 09:24:39.0 | 0 | P34725716:un@prospelearning.com | 0 |
| GetLimits | GetLimits | START STOPPED | 00:00:00 | 1000 | 0 | 2006-11-08 09:24:39.0 | 1 | P34725716:un@prospelearning.com | 0 |

Sales Force Object Testing

Salesforce objects (Accounts, Contacts, Opportunities, Opportunity Line Items, Products, etc.) may now be tested one at a time; Salesforce to Quickbooks, then QuickBooks to Salesforce. All parameters need to be entered prior to starting the Flow.

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 **InterWeave Solutions Portal** regarding details of specifying options to individual flows and running them.

Account Example

SF -> QB flow (SFAcct2QBCustN)

This Flow creates a new account in SF 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 -> SF flow (QBCust2SFAcctN)

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 Salesforce.

2.1.1.5 Step 5 - Binding and Production

Binding and Production

Binding the objects in Salesforce with the objects from Quickbooks provides a mechanism that will prevent duplication. For example, if you selected an Account custom field in Salesforce 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 SF_QB Solution that evening.

Interweave Binding Fields

We need two new custom fields for Accounts, one field for Opportunities and one field for Products to be added in Salesforce. If Salesforce Contacts are used to create Quickbooks Customers or Vendors as a base Salesforce 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 Salesforce objects and QuickBooks records.

Please go to "Setup" in Salesforce, 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".

password then please:

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

3. Customer Logins in the ISP

- 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 than 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 than 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

2.1.1.7 Which InterWeave Model do you have?

The Salesforce_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.

2.1.1.7.1 InterWeave Professional, Premier and Small Business

Professional, Premier and Small Business allows full configuration for the allowed features, but at a lowered price point. **Professional, Premier and Small Business** are uni-directional "Hot Link" activated integrations, with Hot Link placement at the Home Page.

Hot Link Fields in Salesforce

Creating Integration "Links" on the Home page

Create the Custom Links

In Salesforce, click on "**Setup**" at the top of the page, then on the left side-bar, click on "**Customize**", then "**Home**", then "**Custom Links**". Click on "New". see the list of existing custom fields, and click on the "**New**" button above that list. We will be creating 5 "**Links**" in all on the Home Page.

- Integrate Accounts
- Integrate Opportunities
- Integrate Products
- QB Bulk Load

For each of these "**Links**" - create them in the following way.

- Label = Link Title (ex. Integrate Accounts)
- Behavior = Display in existing window without a side-bar or header
- Select Field Title = www.xxx.com (We will supply you with the URL address)

Save, and move on to creating the next one.

Create the Home Page Components

In Salesforce, click on "**Setup**" at the top of the page, then on the left side-bar, click on "

Customize", then **"Home"**, then **"Home Page Components"**. Scroll down to Custom Components and click on "New". see the list of existing custom fields, and click on the **"New"** button above that list.

For the **"Home Page Component"** - create it in the following way.

Step 1. New Custom Components

Name = enter "Integration by **InterWeave**"

Type = select "Links"

Step 2. New Custom Components

Move the **Custom Links** you created earlier to the right hand side - Custom links to show - then Save.

Create the Home Page Layouts

In Salesforce, click on **"Setup"** at the top of the page, then on the left side-bar, click on **"Customize"**, then **"Home"**, then **"Home Page Layouts"**. if you have created multiple page layouts, decide which ones should display the **Custom Links** you just created.

Click on the page and check off "Integration by **InterWeave**" - your new Links will now show on your Home Page. Click next and exit.

2.1.1.7.2 InterWeave Enterprise

If you have selected **Smart Solutions Enterprise**, please complete Steps 1 - 5 below.

Section



3 InterWeave Solutions Portal Configuration Guide

Smart Solutions Object definitions are below.

3.1 Salesforce_Quickbooks Configuration Details

InterWeave Smart Solutions Portal

Salesforce_Quickbooks - Configuration Guide Definitions.

The InterWeave Smart Solutions detail below relates to the **Salesforce_Quickbooks** Solution, organized at the Object level. An "Object" in Sales force 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 |
|--|--|--|---|
| SF Account/Contact to QB Customer/Job | None SF_QB Uni-directional QB_SF 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 SF that integrates with their QB counterpart. This entry is for the standard, B2B SF data structure offering from Salesforce.com. |
| SF Person Account to QB Customer/Job | None SF_QB Uni-directional QB_SF 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 SF that integrates with their QB counterpart. This entry is for the new B2C SF data structure (Person Accounts) offering from Salesforce.com. (You may select either or). |
| SF Account/Contact to QB Vendor | None SF_QB Uni-directional QB_SF 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 SF that integrates with their QB counterpart. This entry is selected if |

| | | | |
|-------------------------------------|--|--|--|
| | | | you use SF Accounts additionally for Vendors. |
| SF Opportunity to QB Job | None SF_QB Uni-directional QB_SF 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 SF that integrates with their QB counterpart. This entry is selected if you utilizing Jobs in QB. |
| SF Opportunity to QB Sales Order | None SF_QB Uni-directional QB_SF 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 SF that integrates with their QB counterpart. This entry is selected if you utilizing Sales Orders in QB. |
| SF Opportunity to QB Purchase Order | None SF_QB Uni-directional QB_SF 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 SF that integrates with their QB counterpart. This entry is selected if you utilizing Purchase Orders in QB. |
| SF Opportunity to QB Invoice | None SF_QB Uni-directional QB_SF 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 SF that integrates with their QB counterpart. This entry is selected if you utilizing Invoices in QB. |
| SF Opportunity to QB Sales Receipt | None SF_QB Uni-directional QB_SF 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 SF that integrates with their QB counterpart. This entry is selected if you utilizing Sales Receipts in QB. |
| SF Opportunity to QB Estimate | None SF_QB Uni-directional | Select from pull-down menu the direction you wish to provide | Primary Object selection to create flows from SF that |

| | | | |
|----------------------------|--|--|---|
| | QB_SF Uni-directional Bi-directional | the objects integration. Uni, bi-directional or none. | integrates with their QB counterpart. This entry is selected if you utilizing Estimates in QB. |
| SF Opportunity to QB Bill | None SF_QB Uni-directional QB_SF 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 SF that integrates with their QB counterpart. This entry is selected if you utilizing Bills in QB. |
| SF Opportunity to QB Check | None SF_QB Uni-directional QB_SF 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 SF that integrates with their QB counterpart. This entry is selected if you utilizing Checks in QB. |
| SF Product to QB Item | None SF_QB Uni-directional QB_SF 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 SF 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 SF Acct to QB Cust

Smart Solutions – SF Account/Contact to QB Customer

| Property Name | Property Value | Entry Description | Notes |
|--|----------------|--|---|
| Binding SF Custom Field with QB ListID | | For each Solution, we bind primary/secondary keys in | Sign-in to your Salesforce account, choose Setup at the |

| | | | |
|--|---|--|--|
| | | each application to each other. | top, select App Setup on the left, select Accounts, then Fields. Choose Account Name and copy/ past the API field name into Property Value. SF 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 SF Custom Field, other options are available to you via the pull-down menu. | |
| Binding SF Custom Field with QB Full Name | | If you do not want to bind QB List ID with a SF 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 | | |
| SF Field with QB Customer Name | | You may create/ select a custom SF 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 Salesforce, use may choose to reflect this in QB Customers with the following pull-down menu. | Establishing Primary Contacts in SF at the Account Level is an SF Data Structure decision. Contact your SF Data Administrator to discuss this option. |
| Default Primary Role Name | | ???????????????? ???????????? | |
| Synchronize Contact Mail Address and Account Billing Address | No For Primary Contact | Select from pull-down menu if you wish to synchronize SF | If you wish Contact Mail Address to be synchronized with |

| | | | |
|--|---|---|---|
| | For All Contacts | Contact Mail address with QB Account Billing Address (or Primary or All Contacts) | Account Billing Address. |
| Propagate SF Hierarchy to QB Customer/Job Hierarchy | No Yes value Yes, using Custom Object | Select from pull-down menu if you wish to propagate the SF Hierarchy to the QB Customer (Jobs are required/included) Hierarchy. | SF Hierarchy in SF at the Account Level is an SF Data Structure decision. Contact your SF Data Administrator to discuss this option. The corollary to SF Hierarchy is QB Customer/Jobs Hierarchy. |
| Hierarchy Level to create QB Job | | Number of Hierarchy levels your looking to create in QB | |
| SF Custom Object Name to create QB Job | | SF Custom Object corollary to QB Job | |
| SF Custom field for Customer Terms | | You may create/ select a custom SF Field that you want to sync with QB Customer Terms. | SF 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 SF Custom field matches the selected QB field. |
| SF Account Custom field for Total Balance | | You may create/ select a custom SF Field that you want to sync with QB Total Balance. | |
| SF Contact Custom field for Middle Name | | You may create/ select a custom SF Field that you want to sync with QB Middle Name. | |
| Permitted sync operations from SF Accounts to QB Customers | None Create and Update Create Only | Select from pull-down menu synchronization options from SF Accounts to QB | Depending if you're initializing either SF or QB, or just one of them is new – you |

| | | | |
|--|--|--|---|
| | Update Only | Customers. | may decide on these functions. Ex. If QB Customers are already there, and you don't want them over-ridden by SF Accounts, you would select "Update Only". |
| Create new QB Customer when | SF Account created SF Opportunity is in certain stage SF Account Custom field has certain value SF Opportunity Custom field has certain value SF Opportunity is Won Precisio Sales Order is in certain state Other | Select from pull-down menu to create new QB Customer at the Account or Opportunity level. If you select a SF custom field, you need to create it in either SF Accounts or SF Opportunities. Precisio Sales Order applies specifically to selecting the Precision OnDemand Inventory option on the Object Selection page. | |
| SF Opportunity Stage to create new QB Customer | | SF 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". |
| SF Custom Field Name to create new QB Customer | | SF Custom field Name created/required to synchronize with the selection of "Create new QB Customer when". | If you selected the above "SF Opportunity Stage to create new QB Customer" you would not use this field. |
| SF Custom Field Value to create new QB Customer | | SF Custom field Value created/required to synchronize with the selection of "Create new QB Customer when". | If you selected the above "SF Opportunity Stage to create new QB Customer" you would not use this field. |
| Merge new SF Accounts with existing QB Customers | Do not merge Name/Phone/ | Select from pull-down menu to merge new | The Merge feature allows you merge |

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

| | | | |
|--|---|--|---|
| QB Field Value to create/ update SF Account | | If QB "Customer Field has certain value" was selected above, enter the QB Field Value. | Format is: |
| Merge new QB Customers with existing SF 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 SF Accounts. | The Merge feature allows you merge existing QB Customers with existing SF Accounts that are selected on the parameters. |
| Create SF Contact Records | No Yes | Create a Salesforce Contact Record. | |
| Synchronize QB Account Number to SF | 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 SF 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. | |
| SF 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 SF Account Owner. | |
| SF 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: |
| SF 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 SF CC information with QB CC information. | |
| Primary SF Contact Synchronization to QB Customer Contact Area required | No Yes | Select from pull-down menu the operation you want performed to synchronize SF 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 SF Person Acct to QB Cust

Smart Solutions – SF Person Account to QB Customer

| Property Name | Property Value | Entry Description | Notes |
|---|--|---|--|
| Synchronize Person Account Mail Address and Account Billing Address | No Yes | This section is for Salesforce's "Person Accounts" data structure – the B2C model. Select from pull-down menu if you wish to synchronize Person Account Mail Address and Account Billing Address in SF. | These area entries are for the new B2C SF data structure (Person Accounts) offering from Salesforce.com only. |
| Propagate SF Person Accounts Hierarchy to QB Customer/Job Hierarchy | No Yes | Select from pull-down menu if you wish to propagate the SF Person Hierarchy to the QB Customer (Jobs are required/included) Hierarchy. | SF Hierarchy in SF at the Account Level is an SF Data Structure decision. Contact your SF Data Administrator to discuss this option. The corollary to SF Hierarchy is QB Customer/Job Hierarchy. |
| Permitted sync operations from SF Person Accounts to QB Customers | None Create and Update Create Only | Select from pull-down menu synchronization | Depending if you're initializing either SF or QB, or just one |

| | | | |
|---|--|---|--|
| | Update Only | options from SF Person Accounts to QB Customers. | of them is new – you may decide on these functions. Ex. If QB Customers are already there, and you don't want them over-riden by SF Accounts, you would select "Update Only". |
| Merge new SF Person 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 SF Person Accounts with existing QB Customers based on the following selections at the Account level. | The Merge feature allows you merge existing SF Accounts with existing QB Customers that are selected on the parameters. |
| Fill QB Customer Billing Street Address with | As SF Person Account Name/Address First Name+Last Name/Name/ Address First Name+Last Name/Address Other | Select from pull-down menu to fill QB Customers Billing Street Address with selections at the Account level. | SF Account format selection to populate QB Customer Billing Address. |
| Fill QB Customer Shipping Street Address with | As SF Person 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. | SF Account format selection to populate QB Customer Shipping Address. |
| Permitted sync operations from QB Customers to SF Person Accounts | None Create and Update Create Only Update Only | Select from pull-down menu the synchronization operation you want performed from QB Customers to SF Accounts. | The opposite the SF to QB sync above. Depending if you're initializing either SF or QB, or just one of them is new – you may decide on these functions. Ex. If SF Accounts are already there, and |

| | | | |
|---|---|---|--|
| | | | you don't want them over-riden by QB Customers, you would select "Update Only". |
| Merge new QB Customers with existing SF Person 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 SF Person Accounts. | The Merge feature allows you merge existing QB Customers with existing SF Accounts that are selected on the parameters |

3.1.4 SF Acct to QB Vendor

Smart Solutions – SF Account/Contact to QB Vendor

| Property Name | Property Value | Entry Description | Notes |
|---|--|--|--|
| Binding SF Custom Field with QB ListID | | For each Solution, we bind primary/ secondary keys in each application to each other. | Sign-in to your Salesforce 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. SF 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 SF Custom Field, other options are available to you via the pull-down menu. | |
| Binding SF Custom Field with QB Full Name | | If you do not want to bind QB List ID with a SF 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 | | |
| SF Field with QB Vendor Name | | You may create/ select a custom SF 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 Salesforce, use may choose to reflect this in QB Customers with the following pull-down menu. | Establishing Primary Contacts in SF at the Account Level is an SF Data Structure decision. Contact your SF 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 SF 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. |
| SF Custom field for Vendor Terms | | You may create/ select a custom SF Field that you want to sync with QB Vendor Terms. | SF 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 SF Custom field matches the selected QB field. |
| SF Account Custom field for Total Balance | | You may create/ select a custom SF Field that you want to sync with QB Total Balance. | |
| SF Contact Custom field for Middle Name | | You may create/ select a custom SF | |

| | | | |
|--|--|--|--|
| | | Field that you want to sync with QB Middle Name. | |
| Permitted sync operations from SF Accounts to QB Vendors | None Create and Update Create Only Update Only | Select from pull-down menu synchronization options from SF Accounts to QB Vendors. | Depending if you're initializing either SF 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 SF Accounts, you would select "Update Only". |
| Create new QB Vendor when | SF Account created SF Opportunity is in certain stage SF Account Custom field has certain value SF Opportunity Custom field has certain value SF Opportunity is Won Precisio Sales Order is in certain state Other | Select from pull-down menu to create new QB Customer at the Account or Opportunity level. If you select a SF custom field, you need to create it in either SF Accounts or SF Opportunities. Precisio Sales Order applies specifically to selecting the Precision OnDemand Inventory option on the Object Selection page. | |
| SF Opportunity Stage to create new QB Vendor | | SF 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". |
| SF Custom Field Name to create new QB Vendor | | SF Custom field Name created/required to synchronize with the selection of "Create new QB Vendor when". | If you selected the above "SF Opportunity Stage to create new QB Customer" you would not use this field. |
| SF Custom Field Value to create new QB Customer | | SF Custom field Value created/ | If you selected the above "SF |

| | | | |
|--|---|--|---|
| | | required to synchronize with the selection of "Create new QB Customer when". | Opportunity Stage to create new QB Customer" you would not use this field. |
| Merge new SF 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 SF Accounts with existing QB Vendors based on the following selections at the Account level. | The Merge feature allows you merge existing SF Accounts with existing QB Vendors that are selected on the parameters. |
| Fill QB Vendor Street Address with | As SF 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. | SF Account format selection to populate QB Vendors Street Address. |
| Permitted sync operations from QB Vendors to SF Accounts | None Create and Update Create Only Update Only | Select from pull-down menu the synchronization operation you want performed from QB Vendors to SF Accounts. | The opposite the SF to QB sync above. Depending if you're initializing either SF or QB, or just one of them is new – you may decide on these functions. Ex. If SF Accounts are already there, and you don't want them over-ridden by QB Customers, you would select "Update Only". |
| Create/Update SF 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 SF Account when. | |
| QB Field Name to create/ update SF Account | | If QB "Customer Field has certain value" was selected above, enter the QB Field Name. | |

| | | | |
|--|---|---|---|
| QB Field Value to create/ update SF Account | | If QB "Customer Field has certain value" was selected above, enter the QB Field Value. | Format is: |
| Merge new QB Vendors with existing SF 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 SF Accounts. | The Merge feature allows you merge existing QB Vendors with existing SF Accounts that are selected on the parameters. |
| Create SF Contact Records | No Yes | Create a Salesforce Contact Record. | |
| SF 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: |
| SF 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. |

3.1.5 SF Opportunity to QB Job

Smart Solutions – SF Opportunity to QB Job

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

| | | | List ID. Is this correct????? |
|--|---|--|--|
| 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 SF Custom Field, other options are available to you via the pull-down menu. | |
| SF Opportunity Field with QB Job Name | | You may create/ select a custom SF Opportunity Field that you want to sync with QB Job Name. | |
| Permitted sync operations from SF Opportunities to QB Jobs | None Create and Update Create Only Update Only | Select from pull-down menu synchronization options from SF Opportunities to QB Jobs. | Depending if you're initializing either SF 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 SF Opportunities, you would select "Update Only". |
| Populate SF Billing Address to QB Job from | Do not populate Account Billing Address Opportunity Billing Address (custom field) Opportunity Billing Address (custom field with name) Opportunity Billing Address (custom field - all) Primary Contact Mailing Address | Select from pull-down menu the operation you want performed to populate the Billing Address from the Account or 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) | Select from pull-down menu the operation you want performed to populate the Shipping Address | |

| | | | |
|---|---|---|--|
| | Opportunity Shipping Address (custom field with name) Opportunity Shipping Address (custom field - all) Primary Contact Mailing Address | from the Account or Opportunity Billing Address to the QB Job. | |
| Fill QB Job Billing Street Address with | As SF 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 SF 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. | |
| SF Opportunity Field with QB Job Start Date | | SF Custom field Name created/ required to synchronize with QB Job Start Date. | |
| SF Opportunity Field with QB Job Projected End Date | | SF Custom field Name created/ required to synchronize with QB Job Projected End Date. | |
| SF Opportunity Field with QB Job Type | | SF Custom field Name created/ required to synchronize with QB Job Type. | |

| | | | |
|---|---|---|---|
| SF Opportunity Field with QB Job Description | | SF Custom field Name created/ required to synchronize with QB Job Description. | |
| SF Opportunity field to QB Job field custom mapping 1 | | SF 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 |
| SF Opportunity field to QB Job field custom mapping 2 (more mappings) | | SF 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 SF Opportunities | None Create and Update Create Only Update Only | Select from pull-down menu the synchronization operation you want performed from QB Jobs to SF Opportunities. | |
| 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. |

3.1.6 SF Opportunity to QB Sales Order

Smart Solutions – SF Opportunity to QB Sales Order

| Property Name | Property Value | Entry Description | Notes |
|---|----------------|--|--|
| SF Opportunity Custom field with QB Sales Order # | | For each Solution, we bind primary/secondary keys in each application to each other. | Sign-in to your Salesforce account, choose Setup at the top, select App Setup on the left, |

| | | | |
|--|--|--|---|
| | | | select Opportunities, then Fields. Choose Opportunity Name and copy/ past the API field name into Property Value. SF Accounts will now be bound to QB Sales Order. |
| QB Sales Order # is generated by | SF QB | Select SF 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 SF (if you have chosen bi-directional at Object level). |
| Permitted sync operations from SF Opportunities to QB Sales Orders | None Create and Update Create Only Update Only | Select from pull-down menu the synchronization operation you want performed from SF Opportunities to QB Sales Orders. | Depending if you're initializing either SF 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 SF Opportunities, you would select "Update |
| Create new QB Sales Order when | When SF Opportunity created SF Opportunity is in certain stage SF Opportunity Custom field has certain value SF Opportunity is Won Other | Select from pull-down menu the operation you want performed to create a new QB Sales Order. If you select a SF Opportunity custom field, you need to create it SF Opportunities. | |
| SF Opportunity 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 Opportunity level. |
| SF Custom Field Name to create new QB Sales Order | | If QB "Create new QB Sales Order when" was selected above, enter/ create the SF Custom Field Name. | |

| | | | |
|---|---|--|---|
| SF Custom Field Value to create new QB Sales Order | | If QB "Create new QB Sales Order when" was selected above, enter/ create the SF 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 Opportunity Billing Address (custom field) Opportunity Billing Address (custom field with name) Opportunity 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 Opportunity level. | Select from the Account or Opportunity level. |
| Populate Shipping Address to QB Sales Order 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 to fill QB Sales Orders Shipping Street Address with selections at the Account or Opportunity level. | Select from the Account of Opportunity level. |
| Fill QB Sales Order Billing Street Address with | Do not fill As SF Source Name/Address | Select from pull-down menu the operation you want performed to create/ | "As Is" in SF or a formatted selection. |

| | | | |
|---|---|---|---|
| | First Name+Last Name/Name/Address First Name+Last Name/Address Other | update to fill QB Sales Order Billing Street Address with. | |
| Fill QB Sales Order Shipping Street Address with | Do not fill As SF 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 SF or a formatted selection. |
| Create QB Line Item Description from SF Product Line and Product ones using | Overwrite Concatenate | Select “Overwrite” or “Concatenate” OB Line Item Description field from the SF Product Line. | ???????????????? ????? |
| Filtering SF Field Name for Sales Order Operations | | SF Custom field Filtering SF Field Name created/required to synchronize with QB Sales Order Operations. | ???????????????? ????? |
| Filtering Value(s) for Sales Order to be Printed | | ???????????????? ?????????? | ???????????????? ????? |
| Filtering Value(s) for Sales Order to be Emailed | | ???????????????? ?????????? | ???????????????? ????? |
| Default Template for Sales Order | | Name of default template selected for Sales Order processing | |
| Permitted sync operations from QB Sales Orders to SF Opportunities | None Create and Update Create Only Update Only | Select from pull-down menu synchronization options from QB Sales Orders to SF Opportunities. | Depending if you're initializing either SF 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 overridden by SF Opportunities, you would select “Update Only”. |
| Create/Update SF | QB SO created/ | Select from pull-down | |

| | | | |
|--|---|--|--|
| Opportunity when | modified QB SO field has certain value Other | menu to create new SF Opportunity when. | |
| QB Field Name to create/ update SF Opportunity | | QB Field Name to synchronize with the selection of "Create/ Update SF Opportunity when". | |
| QB Field Value to create/ update SF Opportunity | | QB Field Value synchronize with the selection of "Create/ Update SF Opportunity when". | |
| New SF Opportunity Stage | | | |
| Update SF Opportunity amounts with calculated QB Sales Order amounts | Never For Line Items Only For Line Items and Total | Select from pull-down menu to update SF Opportunity amounts with the calculated QB Sales Order amounts at line item level or line item and total at Opportunity level. | QB is a financial application, SF 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 Opportunity Billing Address (custom field) Opportunity Billing Address (custom field with name) Opportunity 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 Opportunity Billing Address to the QB Sales Order. | |
| Populate Shipping Address Change in QB Sales Order to | Do not populate Account Shipping Address Opportunity | Select from pull-down menu the operation you want performed to populate the Shipping | |

| | | | |
|--|--|---|---|
| | Shipping Address (custom field) Opportunity Shipping Address (custom field with name) Opportunity Shipping Address (custom field – all Primary Contact Mailing Address | Address change in the Account or Opportunity Billing Address to the QB Sales Order. | |
| Expand SF Group Product after QB Group Item expanded | No Yes | ???????????????????? ???????????? | ???????????????????? ???????????????? |
| Create opportunity 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). |
| SF Opportunity Custom field with Remaining Balance | | SF Custom field Name created/required to synchronize with QB Remaining Balance field. | |
| SF Opportunity Custom field with Customer/Job Name | | SF Custom field Name created/required to synchronize with QB Customer/Job Name | |
| Include Opportunity Primary Contact Lookup | No Yes | Select “Yes” if you want to include Primary Contact lookup from Opportunity. This will overwrite Account/Contact Primary Contact. | |
| SF Opportunity Custom field with QB Purchase Order# | | SF Custom field Name created/required to synchronize with QB Purchase Order #. | |
| SF Opportunity Custom field with QB Invoice# | | SF Custom field Name created/required to synchronize with QB Invoice #. | |

| | | | |
|--|-----------|--|--|
| SF Opportunity Custom field with QB Sales Receipt# | | SF Custom field Name created/required to synchronize with QB Sales Receipt #. | |
| SF Opportunity Custom field with QB Sales Order Date | | SF Custom field Name created/required to synchronize with QB Sales Order Date. | |
| QB Custom field for SF Opportunity Name | | QB Custom field created/required to synchronize with SF Opportunity Name above. | |
| SF Opportunity field to QB Custom field custom mapping 1 | | SF Custom field Name created/required to synchronize with QB Custom Field created/required. | Ex. SF;QB – separate with a semi-colon “;”. You may enter as many as you wish – separate with a comma “,”. |
| SF Opportunity field to QB Custom field custom mapping 2 (more mappings) | | SF Custom field Name created/required to synchronize with QB Custom Field created/required. | Ex. SF;QB – separate with a semi-colon “;”. You may enter as many as you wish – separate with a comma “,”. |
| SF Opportunity Owner to QB Sales Rep mapping required | No Yes | Select “Yes” if you want to map the QB Sales Rep structure to the SF Opportunity Owner field created/required. | |
| SF Custom field for Sales Order Terms | | SF Custom field Name created/required to synchronize with QB Sales Order Terms field. | |
| SF Custom field for Shipping Method | | SF Custom field Name created/required to synchronize with QB Shipping Method field. | |
| SF Custom field for Class | | SF Custom field Name created/required to synchronize with QB Class Field. | |
| SF Custom field for Created | | SF Custom field Name | |

| | | | |
|-------------------------------|--|--|----------------------------------|
| SO Number | | created/required to synchronize with QB SO Number Field. | |
| SF Duplicate Prevention Field | | ???????????????????? ????????? | ???????????????? ???????????? |
| Fast Search for a Customer | | ???????????????????? ????????? | |

3.1.7 SF Opportunity to QB Purchase Order

Smart Solutions – SF Opportunity to QB Purchase Order

| Property Name | Property Value | Entry Description | Notes |
|---|---|--|---|
| SF Opportunity Custom field with QB Purchase Order # | | For each Solution, we bind primary/secondary keys in each application to each other. | Sign-in to your Salesforce account, choose Setup at the top, select App Setup on the left, select Opportunities, then Fields. Choose Opportunity Name and copy/ paste the API field name into Property Value. SF Accounts will now be bound to QB Purchase Order. |
| QB Purchase Order # is generated by | SF QB | Select SF 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 SF (if you have chosen bi-directional at Object level). |
| Permitted sync operations from SF Opportunities to QB Purchase Orders | None Create and Update Create Only Update Only | Select from pull-down menu the synchronization operation you want performed from SF Opportunities to QB Purchase Orders. | Depending if you're initializing either SF 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 SF Opportunities, you |

| | | | |
|---|---|---|---|
| | | | would select "Update" |
| Create new QB Purchase Order when | When SF Opportunity created SF Opportunity is in certain stage SF Opportunity Custom field has certain value SF Opportunity is Won Other | Select from pull-down menu the operation you want performed to create a new QB Purchase Order. If you select a SF Opportunity custom field, you need to create it SF Opportunities. | |
| SF Opportunity 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 Opportunity level. |
| SF Custom Field Name to create new QB Purchase Order | | If QB "Create new QB Purchase Order when" was selected above, enter/create the SF Custom Field Name. | |
| SF Custom Field Value to create new QB Purchase Order | | If QB "Create new QB Purchase Order when" was selected above, enter/create the SF Custom Field Value Name. ??????????? | |
| 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 Mailing Address | Select from pull-down menu to fill QB Vendor from Billing Street Address with selections at the Account or Opportunity level. | Select from the Account or Opportunity level. |
| Populate Shipping Address to QB Purchase Order from | Do not populate Account Shipping Address Opportunity Shipping Address (custom field) Opportunity | Select from pull-down menu to fill QB Purchase Orders Shipping Street Address with selections at the Account or Opportunity level. | Select from the Account of Opportunity level. |

| | | | |
|--|---|--|--|
| | Shipping Address (custom field with name) Opportunity Shipping Address (custom field - all) Primary Contact Mailing Address | | |
| Fill QB Purchase Order Billing Street Address with | Do not fill As SF 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 SF or a formatted selection. |
| Fill QB Purchase Order Shipping Street Address with | Do not fill As SF 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 SF or a formatted selection. |
| Create QB Line Item Description from SF Product Line and Product ones using | Overwrite Concatenate | Select "Overwrite" or "Concatenate" OB Line Item Description field from the SF Product Line. | ????????????????? ????? |
| Filtering SF Field Name for Purchase Order Operations | | SF Custom field Filtering SF Field Name created/ required to synchronize with QB Purchase Order Operations. | ????????????????? ????? |
| Filtering Value(s) for Purchase Order to be Printed | | ????????????????? ?????????? | ????????????????? ?????? |
| Filtering Value(s) for Purchase Order 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 SF Opportunities | None Create and Update Create Only Update Only | Select from pull-down menu synchronization options from QB Purchase Orders to SF Opportunities. | Depending if you're initializing either SF 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 overridden by SF Opportunities, you would select "Update Only". |
| Create/Update SF Opportunity when | QB PO created/ modified QB PO field has certain value Other | Select from pull-down menu to create new SF Opportunity when. | |
| QB Field Name to create/update SF Opportunity | | QB Field Name to synchronize with the selection of "Create/Update SF Opportunity when". | |
| QB Field Value to create/update SF Opportunity | | QB Field Value synchronize with the selection of "Create/Update SF Opportunity when". | |
| New SF Opportunity Stage | | | |
| Update SF Opportunity amounts with calculated QB Purchase Order amounts | Never For Line Items Only For Line Items and Total | Select from pull-down menu to update SF Opportunity amounts with the calculated QB Purchase Order amounts at line item level or line item and total at Opportunity level. | QB is a financial application, SF 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 Opportunity Vendor Billing Address (custom | Select from pull-down menu the operation you want performed to populate the Billing Address change from the Account or Opportunity | |

| | | | |
|--|---|--|--|
| | field) Opportunity Vendor Billing Address (custom field with name) Opportunity Vendor Billing Address (custom field - all) Primary Contact Mailing Address | Billing Address to the QB Purchase Order. | |
| Populate Shipping Address Change in QB Purchase Order to | 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 change in the Account or Opportunity Billing Address to the QB Purchase Order. | |
| Expand SF 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 opportunity 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). |
| SF Opportunity Custom field with Vendor Name | | SF Custom field Name created/required to synchronize with QB Vendor Name field. | |
| Include Opportunity Primary Contact Lookup | No Yes | Select “Yes” if you want to include Primary Contact lookup from | |

| | | | |
|--|--|---|--|
| | | Opportunity. This will overwrite Account/Contact Primary Contact. | |
| SF Opportunity Custom field with QB Purchase Order# | | SF Custom field Name created/required to synchronize with QB Purchase Order #. | |
| QB Custom field for SF Opportunity Name | | QB Custom field created/required to synchronize with SF Opportunity Name above. | |
| SF Opportunity field to QB Custom field custom mapping 1 | | SF Custom field Name created/required to synchronize with QB Custom Field created/required. | Ex. SF;QB – separate with a semi-colon “;”. You may enter as many as you wish – separate with a comma “,”. |
| SF Opportunity field to QB Custom field custom mapping 2 (more mappings) | | SF Custom field Name created/required to synchronize with QB Custom Field created/required. | Ex. SF;QB – separate with a semi-colon “;”. You may enter as many as you wish – separate with a comma “,”. |
| SF Custom field for Purchase Order Terms | | SF Custom field Name created/required to synchronize with QB Purchase Order Terms field. | |
| SF Custom field for Shipping Method | | SF Custom field Name created/required to synchronize with QB Shipping Method field. | |
| SF Custom field for Class | | SF Custom field Name created/required to synchronize with QB Class Field. | |
| SF Custom field for Created PO Number | | SF Custom field Name created/required to synchronize with QB PO Number Field. | |
| SF Duplicate Prevention Field | | ???????????????????? ???????? | ???????????????? ???????????? |

| | | | |
|--------------------------|--|--|--|
| Fast Search for a Vendor | | ???????????????????????????? ?????????? | |
|--------------------------|--|--|--|

3.1.8 SF Opportunity to QB Invoice

Smart Solutions – SF Opportunity to QB Invoice

| Property Name | Property Value | Entry Description | Notes |
|--|--|--|-------|
| SF Opportunity Custom field with QB Invoice# | SF 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 Salesforce account, choose Setup at the top, select App Setup on the left, select Opportunities, then Fields. Choose Opportunity Name and copy/ past the API field name into Property Value. SF Accounts will now be bound to QB Invoice #. | |
| QB Invoice # is generated by | SF QB | Select "QB" if you want QB Invoice #'s to be generated by QB. | |
| Permitted sync operations from SF Opportunities to QB Invoices | None Create and Update Create Only Update Only | Select from pull-down menu the synchronization operation you want performed from SF Opportunities to QB Invoices. | |
| Create new QB Invoice when | When SF Opportunity created SF Opportunity is in certain stage SF Opportunity Custom field has certain value SF Opportunity is Won Other | Select from pull-down menu the operation you want performed to create a new QB Invoice. If you select a SF Opportunity custom field, you need to create it SF Opportunities. | |

| | | | |
|---|---|--|--|
| SF Opportunity Stage to create new QB Invoice | | The stage "value" that will trigger the creation of the new QB Invoice.???????????????????????????????? | |
| SF Custom Field Name to create new QB Invoice | | SF Custom Field Name to synchronize with the selection of "Create/ Update SF Invoice when". | |
| SF Custom Field Value to create new QB Invoice | | SF Custom Field Value synchronize with the selection of "Create/ Update QB Invoice when". | |
| Skip SF Opportunity amounts when creating/updating QB Invoice | No Yes | Select "Yes" if you want to Skip SF Opportunity amounts when creating/ updating QB Invoice from SF 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 Opportunity Billing Address (custom field) Opportunity Billing Address (custom field with name) Opportunity 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 Opportunity level. | |
| Populate Shipping Address to QB Invoice from | Do not populate Account Shipping Address Opportunity | Select from pull-down menu to fill QB Invoice from Shipping Street Address with selections at the Opportunity level. | |

| | | | |
|---|--|---|--|
| | Shipping Address (custom field) Opportunity Shipping Address (custom field with name) Opportunity Shipping Address (custom field - all) Primary Contact Mailing Address | | |
| Fill QB Invoice Billing Street Address with | Do not fill As SF 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 SF 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 SF Product Line and Product ones using | Overwrite Concatenate | Select "Overwrite" or "Concatenate" OB Line Item Description field from the SF Product Line. | |
| Filtering SF Field Name for Invoice Operations | | ???????????????????? ?????????? | |

| | | | |
|--|--|--|--|
| Filtering Value(s) for Invoice to be Printed | | ???????????????????? ????????? | |
| Filtering Value(s) for Invoice to be Emailed | | ???????????????????? ????????? | |
| Default Template for Invoice | Default Template selected for Opportunity processing | | |
| Permitted sync operations from QB Invoices to SF Opportunities | None Create and Update Create Only Update Only | Select from pull-down menu synchronization options from QB Invoices to SF Opportunities. | |
| Create/Update SF Opportunity when | QB Invoice created/modified QB Invoice field has certain value Other | Select from pull-down menu to create new SF Opportunity when. | |
| QB Field Name to create/update SF Opportunity | | QB Field Name to synchronize with the selection of "Create/Update SF Invoice when". | |
| QB Field Value to create/update SF Opportunity | | QB Field Value synchronize with the selection of "Create/Update SF Invoice when". | |
| New SF Opportunity Stage | ????????? | | |
| Update SF Opportunity amounts with calculated QB Invoice amounts | Never For Line Items Only For Line Items and Total | Select from pull-down menu to update SF Opportunity amounts with the calculated QB Invoice amounts at line item level or line item and total at Opportunity level. | |
| Populate Billing Address Change in QB Invoice to | Do not populate Account Billing Address Opportunity Billing Address | Select from pull-down menu the operation you want performed to populate the Billing Address change from the Account or Opportunity | |

| | | | |
|---|---|---|--|
| | (custom field) Opportunity Billing Address (custom field with name) Opportunity Billing Address (custom field - all) Primary Contact Mailing Address | Billing Address to the QB Invoice. | |
| Populate Shipping Address Change in QB Invoice to | 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 change from the Account or Opportunity Billing Address to the QB Invoice. | |
| Expand SF Group Product after QB Group Item expanded | No Yes | ???????????????????? ???????????? | |
| Create opportunity without line items | No Yes | Select "Yes" if you want to Create an Opportunity 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 SF Custom Object | No Yes | | |
| Copy Payment to SF Custom Object | No Yes | | |

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

| | | | |
|--|-----------|---|--|
| | | created/required. | |
| SF Custom field for Invoice Terms | | SF Custom field Name created/required to synchronize with QB Invoice Terms field. | |
| SF Custom field for Shipping Method | | SF Custom field Name created/required to synchronize with QB Shipping Method field. | |
| SF Custom field for Class | | SF Custom field Name created/required to synchronize with QB Class Field. | |
| SF Custom field for Created Invoice Number | | SF Custom field Name created/required to synchronize with QB Invoice Number. | |
| SF Duplicate Prevention Field | | ???????????????????? ????????? | |
| Fast Search for a Customer | No Yes | | |

3.1.9 SF Opportunity to QB Sales Receipt

Smart Solutions – SF Opportunity to QB Sales Receipt

| Property Name | Property Value | Entry Description | Notes |
|--|---|---|-------|
| SF Opportunity Custom field with QB Sales Receipt# | SF 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 Salesforce account, choose Setup at the top, select App Setup on the left, select Opportunities, then Fields. Choose Opportunity Name and copy/ paste the API field name into Property Value. SF Accounts will now be bound to QB Sales Receipt #. | |
| QB Sales Receipt # is generated by | SF QB | Select "QB" if you want QB Sales Receipt #'s to | |

| | | | |
|--|--|---|--|
| | | be generated by QB. | |
| Permitted sync operations from SF Opportunities to QB Sales Receipts | None Create and Update Create Only Update Only | Select from pull-down menu the synchronization operation you want performed from SF Opportunities to QB Sales Receipts. | |
| Create new QB Sales Receipt when | When SF Opportunity created SF Opportunity is in certain stage SF Opportunity Custom field has certain value SF Opportunity is Won Other | Select from pull-down menu the operation you want performed to create a new QB Sales Receipt. If you select a SF Opportunity custom field, you need to create it in SF Opportunities. | |
| SF Opportunity Stage to create new QB Sales Receipt | | The stage "value" that will trigger the creation of the new QB Sales Receipt..?????????????? ?????????? | |
| SF Custom Field Name to create new QB Sales Receipt | | SF Custom Field Name to synchronize with the selection of "Create/ Update SF Sales Receipt when". | |
| SF Custom Field Value to create new QB Sales Receipt | | SF 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 Opportunity Billing Address (custom field) Opportunity Billing Address (custom field) | Select from pull-down menu to fill QB Sales Receipt from Billing Street Address with selections at the Opportunity level. | |

| | | | |
|---|---|---|--|
| | with name) Opportunity Billing Address (custom field - all) Primary Contact Mailing Address | | |
| Populate Shipping Address to QB Sales Receipt 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 to fill QB Sales Receipt from Shipping Street Address with selections at the Opportunity level. | |
| Fill QB Sales Receipt Billing Street Address with | Do not fill As SF 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 SF 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 SF Product Line and Product ones using | Overwrite Concatenate | Select "Overwrite" or "Concatenate" OB Line Item Description field from the SF Product Line. | |
| Default Template for Sales Receipt | Default Template name selected for QB Sales Receipt processing | | |
| Permitted sync operations from QB Sales Receipts to SF Opportunities | None Create and Update Create Only Update Only | Select from pull-down menu synchronization options from QB Sales Receipts to SF Opportunities. | |
| Update SF Opportunity amounts with calculated QB Sales Receipt amounts | Never For Line Items Only For Line Items and Total | Select from pull-down menu to update SF Opportunity amounts with the calculated QB Sales Receipts amounts at line item level or line item and total at Opportunity level. | |
| Create/Update SF Opportunity when | QB SR created/ modified QB SR field has certain value Other | Select from pull-down menu to create new SF Opportunity when. | |
| QB Field Name to create/update SF Opportunity | | QB Field Name to synchronize with the selection of "Create/Update SF Opportunity when". | |
| QB Field Value to create/update SF Opportunity | | QB Field Value synchronize with the selection of "Create/Update SF Opportunity when". | |
| New SF Opportunity Stage | | | |
| Populate Billing Address Change in QB Sales Receipt to | Do not populate Account Billing Address Opportunity Billing Address (custom field) Opportunity | 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 | |

| | | | |
|---|--|--|--|
| | Billing Address (custom field with name) Opportunity Billing Address (custom field - all) Primary Contact Mailing Address | Sales Receipt. | |
| Populate Shipping Address Change in QB Sales Receipt to | 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 change from the Account or Opportunity Billing Address to the QB Sales Receipt. | |
| Expand SF Group Product after QB Group Item expanded | No Yes | ???????????????????? ???????????? | |
| Create opportunity 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 Receipt. | |
| SF Opportunity Custom field with OB Remaining Balance | | SF Custom field Name created/required to synchronize with QB Remaining Balance field. | |
| SF Opportunity Custom field with Customer/Job Name | | | |
| Include Opportunity Primary Contact Lookup | No Yes | Select "Yes" if you want to include Primary | |

| | | | |
|--|-----------|---|--|
| | | Contact lookup from Opportunity. This will overwrite Account/Contact Primary Contact. | |
| SF Opportunity Custom field with QB Purchase Order# | | SF Custom field Name created/required to synchronize with QB Purchase Order #. | |
| SF Opportunity Custom field with QB Sales Receipt Date | | SF Custom field Name created/required to synchronize with QB Sales Receipt Date. | |
| QB Custom field for SF Opportunity Name | | QB Custom field Name created/required to synchronize with SF Opportunity. | |
| SF Opportunity field to QB Custom field custom mapping 1 | | SF Custom field Name created/required to synchronize with QB Custom Field created/required. Ex. SF;QB – separate with a semi-colon “;”. | |
| SF Opportunity field to QB Custom field custom mapping 2 (more mappings) | | SF Custom field Name created/required to synchronize with QB Custom Field created/required. Ex. SF;QB – separate with a semi-colon “;”. | |
| SF Opportunity Owner to QB Sales Rep mapping required | No Yes | Select “Yes” if you want to map the QB Sales Rep structure to the SF Opportunity Owner field created/required. | |
| SF Custom field for Sales Receipt Terms | | SF Custom field Name created/required to synchronize with QB Sales Receipt field. | |
| SF Custom field for Shipping Method | | SF Custom field Name created/required to synchronize with QB Shipping Method field. | |
| SF Custom field for Class | | SF Custom field Name | |

| | | | |
|---------------------------------------|-----------|---|--|
| | | created/required to synchronize with QB Class field. | |
| SF Custom field for Created SR Number | | SF Custom field Name created/required to synchronize with QB Shipping Method field. | |
| SF Duplicate Prevention Field | | ???????????????????? ????????? | |
| Fast Search for a Customer | No Yes | | |

3.1.10 SF Opprortunity to QB Estimate

Smart Solutions – SF Opportunity to QB Estimate

| Property Name | Property Value | Entry Description | Notes |
|---|--|---|-------|
| SF Opportunity Custom field with QB Estimate# | | For each Solution, we bind primary/secondary keys in each application to each other. Sign-in to your Salesforce account, choose Setup at the top, select App Setup on the left, select Opportunities, then Fields. Choose Opportunity Name and copy/ past the API field name into Property Value. SF Accounts will now be bound to QB Sales Estimate #. | |
| QB Estimate # is generated by | SF QB | Select "QB" if you want QB Estimate #'s to be generated by QB. | |
| Permitted sync operations from SF Opportunities to QB Estimates | None Create and Update Create Update Only | Select from pull-down menu the synchronization operation you want performed from SF Opportunities to QB Estimates. | |
| Create new QB Estimate when | When SF Opportunity created | Select from pull-down menu the operation you want performed to create | |

| | | | |
|---|---|---|--|
| | SF Opportunity is in certain stage SF Opportunity Custom field has certain value SF Opportunity is Won Other | a new QB Sales Receipt. If you select a SF Opportunity custom field, you need to create it SF Estimates. | |
| SF Opportunity Stage to create new QB Estimate | | The stage "value" that will trigger the creation of the new QB Estimate.???????????????? ???????????? | |
| SF Custom Field Name to create new QB Estimate | | SF Custom Field Name to synchronize with the selection of "Create/ Update new QB Estimate when". | |
| SF Custom Field Value to create new QB Estimate | | SF 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 Opportunity Billing Address (custom field) Opportunity Billing Address (custom field with name) Opportunity 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 Opportunity level. | |
| Fill QB Estimate Billing Street Address with | Do not fill As SF Source Name/Address First Name+Last Name/Name/Address First Name+Last Name/Address | Select from pull-down menu to fill QB Estimate from Shipping Street Address with selections at the Opportunity level. | |

| | | | |
|---|---|--|--|
| | Other | | |
| Create QB Line Item Description from SF Product Line and Product ones using | Overwrite Concatenate | Select "Overwrite" or "Concatenate" OB Line Item Description field from the SF Product Line. | |
| Default Template for Estimate | Default Template selected for QB Estimate processing | | |
| Permitted sync operations from QB Estimates to SF Opportunities | None Create and Update Create Only Update Only | Select from pull-down menu synchronization options from QB Estimates to SF Opportunities. | |
| Create/Update SF Opportunity when | QB Estimate created/modified QB Estimate field has certain value Other | Select from pull-down menu to create new SF Opportunity when. | |
| QB Field Name to create/update SF Opportunity | | QB Field Name to synchronize with the selection of "Create/Update SF Opportunity when". | |
| QB Field Value to create/update SF Opportunity | | QB Field Value synchronize with the selection of "Create/Update SF Opportunity when". | |
| New SF Opportunity Stage | | | |
| Update SF Opportunity amounts with calculated QB Estimate amounts | Never For Line Items Only For Line Items and Total | Select from pull-down menu to update SF Opportunity amounts with the calculated QB Estimates amounts at line item level or line item and total at Opportunity level. | |
| Populate Billing Address Change in QB Estimate to | Do not populate Account Billing Address Opportunity Billing Address (custom | Select from pull-down menu the operation you want performed to populate the Billing Address change from the | |

| | | | |
|--|---|--|--|
| | field) Opportunity Billing Address (custom field with name) Opportunity Billing Address (custom field - all) Primary Contact Mailing Address | Account or Opportunity Billing Address to the QB Estimate. | |
| Expand SF Group Product after QB Group Item expanded | No Yes | ???????????????????? ???????????? | |
| Create opportunity 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 | | |
| SF Opportunity Custom field with Customer/Job Name | | SF Custom field Name created/required to synchronize with QB Customer/Job Name field. | |
| SF Opportunity Custom field with QB Estimate Date | | SF Custom field Name created/required to synchronize with QB Estimate Date field. | |
| QB Custom field for SF Opportunity Name | | QB Custom field Name created/required to synchronize with SF Opportunity. | |
| SF Opportunity field to QB Custom field custom mapping | | SF Custom Opportunity field created/required to synchronize with QB Custom field created/required. This is a generic place holder. | |
| SF Opportunity field to QB Custom field custom mapping 1 | | SF Custom field Name created/required to synchronize with QB Custom Field created/required. Ex. SF;QB – | |

| | | | |
|--|-----------|---|--|
| | | separate with a semi-colon “;”. | |
| SF Opportunity field to QB Custom field custom mapping 2 | | SF Custom field Name created/required to synchronize with QB Custom Field created/required. Ex. SF;QB – separate with a semi-colon “;”. | |
| Include Opportunity Primary Contact Lookup | No Yes | Select “Yes” if you want to include the Opportunity Primary Contact lookup as an override. | |
| SF Opportunity Owner to QB Sales Rep mapping required | No Yes | Select “Yes” if you want to synchronize SF Opportunity Owner with QB Sales Rep Mapping. | |
| SF Custom field for Customer Terms | | SF Custom field Name created/required to synchronize with QB Customer Terms field. | |
| SF Custom field for Shipping Method | | SF Custom field Name created/required to synchronize with QB Shipping Method field. | |
| SF Custom field for Class | | SF Custom field Name created/required to synchronize with QB Class field. | |
| SF Custom field for Created Estimate Number | | SF Custom field Name created/required to synchronize with QB Created Estimate Number field. | |
| SF Duplicate Prevention Field | | ???????????????????? ?????????? | |
| Fast Search for a Customer | | | |

3.1.11 SF Opprortunity to QB Check

Smart Solutions – SF Opportunity to QB Check

| Property Name | Property Value | Entry Description | Notes |
|---------------|----------------|-------------------|-------|
|---------------|----------------|-------------------|-------|

| | | | |
|--|--|--|--|
| SF Opportunity Custom Object for QB Commission Check | | | |
| SF Field with QB Commission Check# | | | |
| QB Commission Check # is generated by | SF 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 | | | |
| SF Field Name for QB Commission Check Amount | | | |
| SF Field Name for QB Commission Check Date | | | |
| SF Field Name for QB Compensation Check Payee Reference | | | |
| Permitted sync operations from SF Opportunities to QB Checks | None Create and Update Create Update Only | Select from pull-down menu the synchronization operation you want performed from SF Opportunities to QB Checks. | |
| Create new QB Check when | When SF Opportunity created SF Opportunity is in certain stage SF Opportunity Custom field has certain value SF Opportunity is Won Other | Select from pull-down menu the operation you want performed to create a new QB Sales Check. If you select a SF Opportunity custom field, you need to create it SF Estimates. | |
| SF Opportunity Stage to create new QB Check | | The stage "value" that will trigger the creation of the new QB Check. ?????????????? ?????????? | |

| | | | |
|--|---|--|--|
| SF Custom Field Name to create new QB Check | | SF Custom Field Name to synchronize with the selection of "Create/ Update new QB Check when". | |
| SF Custom Field Value to create new QB Check | | SF 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 Opportunity Billing Address (custom field) Opportunity Billing Address (custom field with name) Opportunity Billing Address (custom field - all) Primary Contact Mailing Address | Select from pull-down menu to fill Check from Billing Street Address with selections at the Opportunity level. | |
| Fill QB Check Street Address with | Do not fill As SF Source Name/Address First Name+Last Name/Name/ Address First Name+Last Name/Address Other | Select from pull-down menu to fill QB Check Address with selections at the Opportunity level. | |
| SF Opportunity field to QB Custom field custom mapping 1 | | SF Custom field Name created/required to synchronize with QB Custom Field created/ required. Ex. SF;QB – separate with a semi-colon “;”. | |
| SF Opportunity field to QB Custom field custom mapping 2 | | SF Custom field Name created/required to synchronize with QB Custom Field created/ required. Ex. SF;QB – separate with a semi-colon “;”. | |

| | | | |
|---------------------------|--|---|--|
| SF Custom field for Class | | SF Custom field Name created/required to synchronize with QB Class field. | |
|---------------------------|--|---|--|

3.1.12 QB Multiple Transaction Supported

Smart Solutions – QB Multiple Transactions Support

| Property Name | Property Value | Entry Description | Notes |
|---|----------------|--------------------------------------|-------|
| SF Opportunity field with Transaction Selection criterion | | ???????????????????? ???????????? | |
| Invoice Selection value | | ???????????????????? ???????????? | |
| Sales Receipt Selection value | | ???????????????????? ???????????? | |
| Estimate Selection value | | ???????????????????? ???????????? | |
| Bill Selection value | | ???????????????????? ???????????? | |

3.1.13 SF Products to QB Items

Smart Solutions – SF Product to QB Inventory Item

| Property Name | Property Value | Entry Description | Notes |
|--|---|--|-------|
| Binding between SF 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 Salesforce account, choose Setup at the top, select App Setup on the left, select Products (Your Salesforce version must contain the Product option), then Fields. Choose Product Name and copy/ past the API | |

| | | | |
|--|---|--|--|
| | | field name into Property Value. SF Products will now be bound to QB Inventory Item. | |
| Custom Object Name to create QB Item | | | |
| SF Product field containing Product Group Name | | SF Product Field Name created/required to synchronize with QB Product Group Name field. | |
| SF Product field containing Item Name for sub-items | | SF Product Field Name created/required to synchronize with QB Item Name for sub-items. | |
| SF Support for Inventory items cost required | No Yes | Select "Yes" if you want to use SF Support for Inventory Items Cost required. | |
| SF Support for Item weight required | No Yes | Select "Yes" if you want to use SF Support for Item weight required. | |
| Permitted sync operations from SF Products to QB Inventory Items | None Create and Update Create Only Update Only | Select from pull-down menu synchronization options from SF Products to QB Inventory Items. | |
| SF Product field to select QB Item Type | | SF Product Field Name created/required to synchronize with QB Item Type. | |
| SF Product field to select QB Item Account | | SF Product Field Name created/required to synchronize with QB Item Account. | |
| SF Product field to select QB Inventory Item COGS Account | | SF Product Field Name created/required to synchronize with QB Inventory COGS Account. | |
| SF Product field value for Inventory Item Type | | SF Product Field "Value" for QB Inventory Item Type. | |
| Default Income Account for Inventory Item Type | | SF Product Default Income Account "Value" | |

| | | | |
|--|---|--|--|
| | | for QB Inventory Item Type. | |
| Default COGS Account for Inventory Item Type | | SF Product Default COGS Account "Value" for QB Inventory Item Type. | |
| Default Asset Account for Inventory Item Type | | SF Product Default Asset Account "Value" for QB Inventory Item Type. | |
| SF Product field value for Non-Inventory Item Type | | SF Product Field Name created/required to synchronize with QB Non-Inventory Item Type. | |
| Default Account for Non-Inventory Item Type | | SF Product Default Account "Value" for QB Non-Inventory Item Type. | |
| SF Product field value for Service Item Type | | SF Product Field "Value" for QB Service Item Type. | |
| Default Account for Service Item Type | | SF Product Default Account "Value" for QB Service Item Type. | |
| SF Product field value for Other Charge Item Type | | SF Product Field "Value" for QB Other Charge Item Type. | |
| Default Account for Other Charge Item Type | | SF Product Default Account "Value" for QB Other Charge Item Type. | |
| SF Product field value for Discount Item Type | | SF Product Field "Value" for QB Discount Item Type. | |
| Default Account for Discount Item Type | | SF Product Default Account "Value" for QB Discount Item Type. | |
| SF Support for Inventory items cost required | No Yes | Select "Yes" if you want to use SF Support for Inventory Items Cost required. | |
| Permitted sync operations from QB Inventory Items to SF Products | None Create and Update Create Only Update Only | Select from pull-down menu synchronization options from QB Inventory Items to SF Products. | |

Multiple QB Company Files Support

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

3.1.15 SF / QB Credentials

Smart Solutions – SF Credentials

| Property Name | Property Value | Entry Description | Notes |
|---------------------------------|----------------|---|-------|
| SF Integration User | | Salesforce.com User Id – to allow authorized connection with Salesforce. | |
| SF Integration Password | | Salesforce.com Password – to allow authorized connection with Salesforce. | |
| Confirm SF Integration Password | | Confirmed Salesforce.com Password – to allow authorized connection with Salesforce. | |

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/ | | Quickbooks Password – | |

| | | | |
|---------------------------------------|--|---|--|
| Token | | 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 | Notes |
|--------------------------------------|--|--|-------|
| 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 | Select from pull-down menu the action you would like upon a data or connection error determined by InterWeave. | |

| | | | |
|---|--|--|--|
| | Error Daily Report Only Full Daily Report Only | | |
| 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. | |
|--|--|---|--|

3.2 Ascent_Quickbooks Configuration Details

InterWeave Smart Solutions Portal

Salesforce(Ascent)_Quickbooks - Configuration Guide Definitions.

The InterWeave Smart Solutions detail below relates to the **Salesforce(Ascent)_Quickbooks** Solution, organized at the Object level. An "Object" in Sales force 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.

3.2.1 Ascent Opportunity to QB Sales Order

Smart Solutions – Ascent Opportunity to QB Sales Order

| Property Name | Property Value | Entry Description | Notes |
|---|--|---|-------|
| Permitted sync operations from Ascent Sales Order to QB Sales Order | Create and Update Create Only Update Only | | |
| Create new QB Sales Order when | When Ascent Sales Order Ascent Sales Order is in certain stage Ascent Sales Order Custom field has certain value Other | Select from pull-down menu the operation you want performed to create a new QB Sales Order. If you select a Ascent Sales Order custom field, you need to create it Ascent Sales Orders. | |
| Ascent Sales Order Status to create new QB Sales Order | | | |
| SF Field Value to create new QB Sales Order | | | |
| Dummy Shipping and Handling QB Sales Order Item Name | | | |

| | | | |
|--|---|---|--|
| <p>Use Dummy Shipping and Handling for Dummy Sales Order</p> | <p>No Yes</p> | <p>Select "Yes" if you want to use Dummy Shipping and Handling for QB Dummy Sales Orders.</p> | |
| <p>Populate Billing Address to QB Sales Order from</p> | <p>Do not populate Account Billing Address Opportunity Billing Address (custom field) Opportunity Billing Address (custom field with name) Opportunity Billing Address (custom field - all) Primary Contact Mailing Address</p> | <p>Select from pull-down menu to fill QB Sales Order from Billing Street Address with selections at the Account or Opportunity level.</p> | <p>Select from the Account or Opportunity level.</p> |
| <p>Populate Shipping Address to QB Sales Order from</p> | <p>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</p> | <p>Select from pull-down menu to fill QB Sales Orders Shipping Street Address with selections at the Account or Opportunity level.</p> | <p>Select from the Account of Opportunity level.</p> |
| <p>Fill QB Sales Order Billing Street Address with</p> | <p>Do not fill As SF Source Name/Address First Name+Last Name/Name/Address First Name+Last Name/Address Other</p> | <p>Select from pull-down menu the operation you want performed to create/update to fill QB Sales Order Billing Street Address with.</p> | <p>"As Is" in SF or a formatted selection.</p> |
| <p>Fill QB Sales Order Shipping Street Address with</p> | <p>Do not fill As SF Source Name/Address First Name+Last</p> | <p>Select from pull-down menu the operation you want performed to create/update to Fill QB Sales</p> | <p>"As Is" in SF or a formatted selection.</p> |

| | | | |
|---|---|--|---|
| | Name/Name/ Address First Name+Last Name/Address Other | Order Shipping Street Address with. | |
| Filtering SF Field Name for Sales Order Operations | | SF Custom field Filtering SF Field Name created/ required to synchronize with QB Sales Order Operations. | ????????????????? ????? |
| Filtering Value(s) for Sales Order to be Printed | | ????????????????? ?????????? | ????????????????? ????? |
| Filtering Value(s) for Sales Order to be Emailed | | ????????????????? ?????????? | ????????????????? ????? |
| Default Template for Sales Order | | Name of default template selected for Sales Order processing | |
| Permitted sync operations from QB Sales Orders to Ascent Sales Orders | None Create and Update Create Only Update Only | Select from pull-down menu synchronization options from QB Sales Orders to Ascent Sales Orders. | Depending if you're initializing either SF 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-riden by Ascent Sales Orders, you would select "Update Only". |
| Create/Update Ascent Sales Order when | QB SO created/ modified QB SO field has certain value Other | Select from pull-down menu to create new Ascent Sales Order. | |
| QB Field Name to create/ update Ascent Sales Order | | QB Field Name to synchronize with the selection of "Create/ Update SF Opportunity when". | |
| QB Field Value to create/ update Ascent Sales Order | | QB Field Value synchronize with the selection of "Create/ Update SF Opportunity | |

| | | | |
|--|--|--|--|
| | | when". | |
| New SF Sales Order Status | | | |
| Update Ascent Sales Order amounts with calculated QB Sales Order amounts | Never For Line Items Only For Line Items and Total | Select from pull-down menu to update Ascent Sales Order amounts with the calculated QB Sales Order amounts at line item level or line item and total at Opportunity level. | QB is a financial application, SF 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 Opportunity Billing Address (custom field) Opportunity Billing Address (custom field with name) Opportunity 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 Opportunity Billing Address to the QB Sales Order. | |
| Populate Shipping Address Change in QB Sales Order to | 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 change in the Account or Opportunity Billing Address to the QB Sales Order. | |
| Expand SF Group Product after QB Group Item expanded | 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). |
| Ascent Sales Order Custom field with Remaining Balance | | Ascent Sales Order Custom field Name created/required to synchronize with QB Remaining Balance field. | |
| Ascent Sales Order field to QB Custom field custom mapping 1 | | Ascent Sales Order Custom field Name created/required to synchronize with QB Custom Field created/required. | Ex. Ascent;QB – separate with a semi-colon ";". You may enter as many as you wish – separate with a comma ",". |
| Ascent Sales Order field to QB Custom field custom mapping 2 (more mappings) | | Ascent Sales Order Custom field Name created/required to synchronize with QB Custom Field created/required. | Ex. Ascent;QB – separate with a semi-colon ";". You may enter as many as you wish – separate with a comma ",As". |
| Ascent Sales Order to QB Sales Rep mapping required | No Yes | Select "Yes" if you want to map the QB Sales Rep structure to the SF Opportunity Owner field created/required. | |
| SF Custom field for Class | | SF Custom field Name created/required to synchronize with QB Class Field. | |
| SF Custom field for Created SO Number | | SF Custom field Name created/required to synchronize with QB SO Number Field. | |
| SF Duplicate Prevention Field | | ???????????????????? ????????? | ???????????????? ???????????? |
| Create/Update Pending Invoice Automatically when Invoice Line is created | No Yes | Select "Yes" if you want to create an Invoice in Pending status automatically. | |

| | | | |
|----------------------------|-----------|--|--|
| Fast Search for a Customer | No Yes | ???????????????????????????? ?????????? | |
|----------------------------|-----------|--|--|

3.2.2 Ascent Items to QB Items

Smart Solutions – Ascent Items to QB Items

| Property Name | Property Value | Entry Description | Notes |
|---|---|---|-------|
| Binding between Ascent Item and QB Inventory Item | Ascent Name - Item Name Ascent Name - Item SKU (custom) Ascent Code - Item SKU (custom) Ascent Code - Item Name Other | For each Solution, we bind primary/secondary keys in each application to each other. Sign-in to your Salesforce account, choose Setup at the top, select App Setup on the left, select Ascent Item (Your Salesforce version must contain the Product option), then Fields. Choose Ascent Item Name and copy/ past the API field name into Property Value. SF Ascent Items will now be bound to QB Inventory Item. | |
| Ascent Item field containing Item Name for sub-item | | | |
| Permitted sync operations from Ascent Items to QB Inventory Items | None Create and Update Create Only Update Only | Select from pull-down menu synchronization options from Ascent Items to QB Inventory Items. | |
| Ascent Item field to select QB Item Type | | Ascent Item Field Name created/required to synchronize with QB Item Type. | |
| Ascent Item field value for Inventory Item Type | | Ascent Item Field Name created/required to synchronize with QB Item Account. | |
| Ascent Item field value for Non-Inventory Item Type | | Ascent Item Field Name created/required to synchronize with QB Non- | |

| | | | |
|---|---|--|--|
| | | Inventory Item Type. | |
| Ascent Item field value for Service Item Type | | Ascent Item Field "Value" for QB Service Item Type. | |
| Ascent Item Field for Other Charge Item Type | | Ascent Item Field "Value" for QB Other Charge Item Type. | |
| Ascent Item Field value for Discount Item Type | | Ascent Item Field "Value" for QB Discount Item Type. | |
| Permitted sync operations from QB Inventory Items to Ascent Items | None Create and Update Create Only Update Only | Select from pull-down menu synchronization options from QB Inventory Items to Ascent Items. | |
| Default Location | | | |
| Default Item Group | | | |
| Default Unit of Measure | | | |
| QB Custom Field to Suppress Transaction | | QB Custom Field Name created/required to suppress transaction. | |
| Upload Inactive QB Items (to what field?) | No Yes | Select "Yes" if you want to upload Inactive QB Items to SF ?????????????????? ??????????? | |

3.2.3 Ascent Item, Price Book and Company File

Smart Solutions – SF Price Book

| Property Name | Property Value | Entry Description | Notes |
|--------------------|----------------|--|-------|
| SF Price Book Name | | Enter SF Price Book name other than standard SF default Price Book | |

Multiple QB Company Files Support

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

3.3 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.

3.3.1 Salesforce_Quickbooks Solution

See detail areas below.

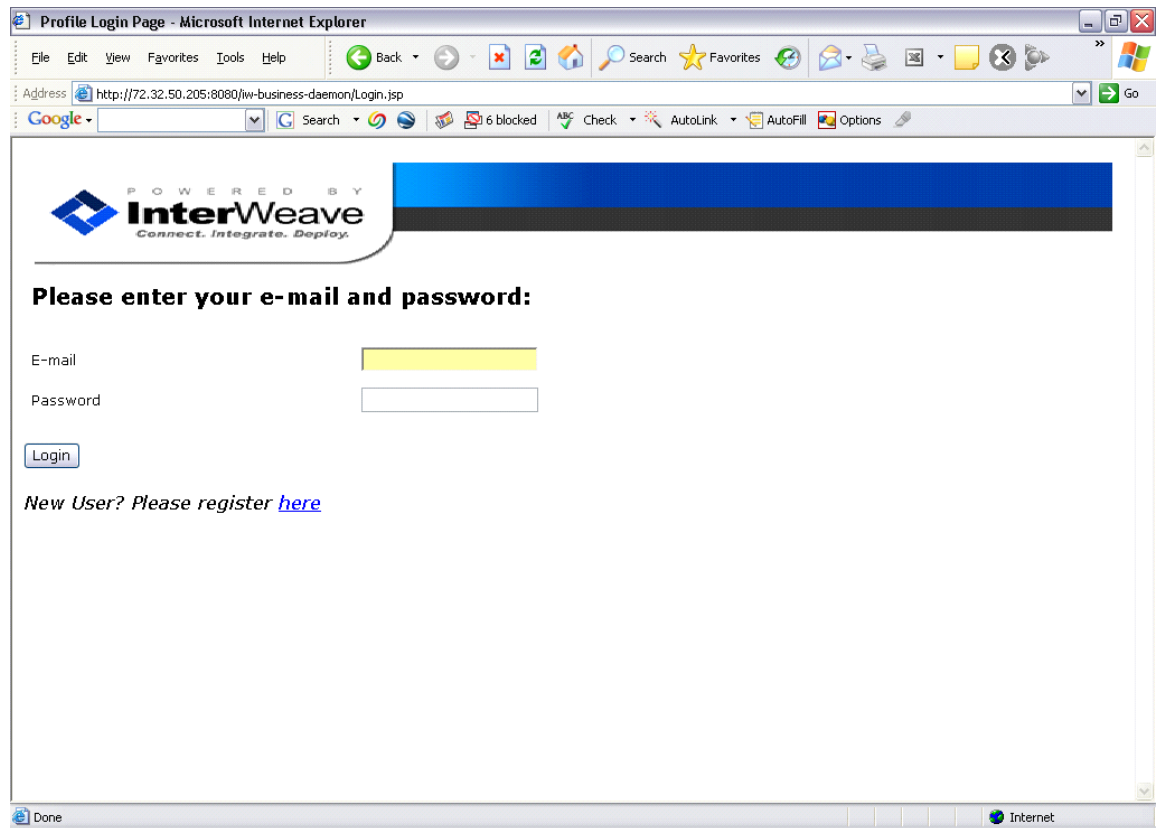
3.3.1.1 User Creation and Receipt of Token

(Under Build)

3.3.1.2 Setting and Scheduling your Transactions

Setting and Scheduling your transactions using the Integration Manager

Executing your transactions is done through the InterWeave Solutions Portal which launches after you login to the InterWeave 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:

Interweave Scheduling and Configuration Utility

Configure Transactions to Start

| Transaction Flow Id | Start Transaction Name | Start/Stop | State | Scheduled | Single Run | Interval | Shift | Query Starts | Counter |
|---------------------------------------|------------------------|--------------------------------|---------|----------------------------------|----------------------------------|----------|--------|-----------------------|---------|
| Next2QBSR | OrderQuery | <input type="checkbox"/> START | STOPPED | <input checked="" type="radio"/> | <input type="radio"/> | 1000 | 0 | 1998-10-01 00:00:00.0 | 0 |
| Next2QBPO | OrderQuery | <input type="checkbox"/> START | STOPPED | <input type="radio"/> | <input checked="" type="radio"/> | 0 | 0 | 2006-05-10 11:53:28.2 | 0 |
| Next2SFAcct | CustQueryNextSF | <input type="checkbox"/> START | STOPPED | <input checked="" type="radio"/> | <input type="radio"/> | 1000 | 0 | 2006-06-05 08:57:52.0 | 0 |
| Next2SFItem | OrderQueryNew | <input type="checkbox"/> START | STOPPED | <input checked="" type="radio"/> | <input type="radio"/> | 1000 | 0 | 2006-06-05 08:57:52.0 | 0 |
| NextAcct2QB Cust | CustQueryNext | <input type="checkbox"/> START | STOPPED | <input checked="" type="radio"/> | <input type="radio"/> | 1000 | 0 | 2006-06-26 15:55:56.1 | 0 |
| NextOrdCust2QB AcctSR | CustQueryNextTime | <input type="checkbox"/> START | STOPPED | <input checked="" type="radio"/> | <input type="radio"/> | 600000 | 240000 | 2006-06-29 09:00:00.0 | 0 |
| NextOrd2SF OrdItem | OrderQuerySFTime | <input type="checkbox"/> START | STOPPED | <input checked="" type="radio"/> | <input type="radio"/> | 600000 | 120000 | 2006-06-30 09:00:00.0 | 0 |
| NextCust2SFAcct | CustQueryNextTimeSF | <input type="checkbox"/> START | STOPPED | <input checked="" type="radio"/> | <input type="radio"/> | 600000 | 0 | 2006-07-10 19:34:20.0 | 0 |

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 **InterWeave 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.

3.3.1.3 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'.

Interweave Scheduling and Configuration Utility IW Monitor

Configure Transactions to Start

| Transaction Flow Id | Start Transaction Name | Start/Stop | State | Scheduled | Single Run | Interval | Shift | Query Starts | Counter |
|---------------------------------|------------------------|--------------------------------|---------|----------------------------------|----------------------------------|----------|-------|-----------------------|---------|
| Next2QBSR | OrderQuery | <input type="checkbox"/> START | STOPPED | <input checked="" type="radio"/> | <input type="radio"/> | 1000 | 0 | 1998-10-01 00:00:00.C | 0 |
| Next2QBPO | OrderQuery | <input type="checkbox"/> START | STOPPED | <input type="radio"/> | <input checked="" type="radio"/> | 0 | 0 | 2006-05-10 11:53:28.2 | 0 |
| Next2SFAcct | CustQueryNextSF | <input type="checkbox"/> START | STOPPED | <input checked="" type="radio"/> | <input type="radio"/> | 1000 | 0 | 2006-06-05 08:57:52.C | 0 |
| Next2SFItem | OrderQueryNew | <input type="checkbox"/> START | STOPPED | <input checked="" type="radio"/> | <input type="radio"/> | 1000 | 0 | 2006-06-05 08:57:52.C | 0 |
| NextAcct2QBCust | CustQueryNext | <input type="checkbox"/> START | STOPPED | <input checked="" type="radio"/> | <input type="radio"/> | 1000 | 0 | 2006-06-26 15:55:56.1 | 0 |

Transaction Flow: Next2SFItem

| Property Name | Property Value |
|---------------|--|
| SFURL | https://www.salesforce.com/services/Soap/u/7.0 |
| ORDER_END | 999999 |
| SFPassword | rotten2her |
| USER | lan |
| SFUser | jengel@paper.com |
| OMS_KEY | 3,0EV^1,BHvwujoo4uB} |
| PASSWORD | lucky2duck |
| ORDER_START | 1 |

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.

InterWeave Scheduling and Configuration Utility

Configure Transactions to Start

| Transaction Flow Id | Start Transaction Name | Start/Stop | State | Scheduled | Single Run | Interval | Shift | Query Starts | Count |
|--|------------------------|---|---------|-----------|------------|----------|-------|-----------------------|-------|
| CMSLeadIn2SFLead | GetCMSLeads | <input type="checkbox"/> START | STOPPED | 🟢 | 🔴 | 900000 | 0 | 2006-11-08 09:24:39.8 | 0 |
| CMSOppIn2SF0ppHeadItem | GetCMSOrders | <input checked="" type="checkbox"/> START | STOPPED | 🟢 | 🔴 | 900000 | 0 | 2006-11-08 09:24:39.8 | 0 |
| CMSProdIn2SFProdPBook | GetCMSProducts | <input type="checkbox"/> START | STOPPED | 🟢 | 🔴 | 00:00:00 | T | 2006-11-08 09:24:39.8 | 0 |
| CMSAccountIn2SFAcct | GetCMSAccounts | <input type="checkbox"/> START | STOPPED | 🟢 | 🔴 | 900000 | 0 | 2006-11-08 09:24:39.8 | 0 |
| SFLeadOut2CMSLead | SFLogin_CM | <input type="checkbox"/> START | STOPPED | 🟢 | 🔴 | 900000 | 0 | 2006-11-08 09:24:39.8 | 0 |

Transaction Flow: CMSOppIn2SF0ppHeadItem

| Property Name | Property Value |
|---------------|--|
| CMSPassword | SalesForce1 |
| SFPassword | test123 |
| CMSUser | sales |
| SFUser | interweave_integration@prosperlearning.com |
| tranname | GetCMSOrders |

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.

| Transaction Flow Id | Start Transaction Name | State | Scheduled | Single Run | Interval | Shift | Query Starts | Counter | Runs |
|--------------------------------------|------------------------|---------|-----------|------------|----------|--------|-------------------------|---------|------|
| Next2QBSR | OrderQuery | STOPPED | | | 1000 | 0 | 1998-10-01 00:00:00.0 | 0 | 00 |
| Next2QBPO | OrderQuery | STOPPED | | | 0 | 0 | 2006-05-10 11:53:28.296 | 0 | 00 |
| Next2SFAcct | CustQueryNextSF | STOPPED | | | 1000 | 0 | 2006-06-05 08:57:52.015 | 0 | 00 |
| Next2SFItem | OrderQueryNew | STOPPED | | | 1000 | 1000 | 2006-07-31 00:00:00.0 | 0 | 00 |
| NextAcct2QB Cust | CustQueryNext | STOPPED | | | 1000 | 0 | 2006-06-26 15:55:56.14 | 0 | 00 |
| NextOrdCust2QBAcctSR | CustQueryNextTime | STOPPED | | | 600000 | 240000 | 2006-06-29 09:00:00.0 | 0 | 00 |
| NextOrd2SFOrdItem | OrderQuerySFTIME | STOPPED | | | 600000 | 120000 | 2006-06-30 09:00:00.0 | 0 | 00 |
| NextCust2SFAcct | CustQueryNextTimeSF | STOPPED | | | 600000 | 0 | 2006-07-10 19:34:20.0 | 0 | 00 |

3.3.2 InterWeave Transaction Definition and Execution Overview

InterWeave 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 **InterWeave** Flows; Scheduled and Utility. Flows typically are at object level, i.e. SF Account to QB Solutions, or SF Opportunity to QB Invoice. In the Utility category, we have additional sub-categories by Name, Full Name or Date Range.

InterWeave has 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 not hesitate to contact an **InterWeave** Support Specialist at support@interweave.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) |
|--------------------------|--------------------------|---|--|
| SF to QB Flows | | | |
| Accounts | | SFAcct2QBCustN | SFAcct2QBCustDR |
| Opportunities | SFAcctOpp2QBCustInv | SFOpp2QBInvN | SFOpp2QBInvDR |
| | | | |
| | | | |
| QB to SF Flows | | | |
| Solutions | | QBCust2SFAcctNF | QBCust2SFAcctDR |
| Invoices | QBCustInvoices2SFAcctOpp | QBInvoices2SFAcctOppN | QBInvoices2SFAcctOppDR |
| | | | |
| | | | |
| IT Reserved Flows | SFAcct2QBCustBind | SFAcct2QBCustBindN | |
| Disabled Flows | ((SFAcctOppQBCustInv)) | ((QBCust2SFAcctN)) | |

3.3.2.1 Utility Transactions

Utility Transactions

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

Name Utility Transactions

SFAcct2QBCustN **Creates new and updates existing Customers in QB from SF Accounts based on (the Name entered) or the primary/secondary keys selected in the ICP user configurations.**

Description: This flow will query SF Accounts based on the single SF 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.

SFOpp2QBInvN **Creates new and updates existing Invoices in QB from SF Opportunities based on (the Name entered) or the primary/secondary keys selected in the ICP user configurations.**

Description: This flow will query SF Opportunities based on the single SF Opportunity 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.

QBCust2SFAcctNF **Creates new and updates existing SF Accounts from Customers in QB from based on (the Full Name entered) or the primary/secondary keys selected in the ICP user configurations.**

Description: This flow will query QB Solutions based on the single SF Account ID (or Full Name) entered in the Integration Manager Console for insertion or updating into SF 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 SF due to data problems, etc.

Best Practices: Not applicable – testing run.

QBInvoices2SFAcctOppN **Creates new and updates existing SF Accounts/Opportunities from Invoices in QB based (the Name entered) and on the primary/secondary keys selected in the ICP 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 SF Accounts and Opportunities. 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 SF due to data problems, etc.

Best Practices: Not applicable – testing run.

3.3.2.2 Date Range Utility Transactions

Date Range Utility Transactions

SFAcct2QBCustDR **Creates new and updates existing Customers in QB from SF Accounts based on (the Date Range) and the primary/secondary keys selected in the ICP user configurations.**

Description: This flow will query SF 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.

SFOpp2QBInvDR **Creates new and updates existing Invoices in QB from SF Opportunities based on (the Date Range) and the primary/secondary keys selected in the ICP user configurations.**

Description: This flow will query SF Opportunities 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.

QBCust2SFAcctDR **Creates new and updates existing SF Accounts from Customers in QB from based on (the Date Range) and the primary/secondary keys selected in the ICP user configurations.**

Description: This flow will query QB Solutions on the Date Range entered in the Integration Manager Console for insertion or updating into SF 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 SF due to data problems, etc.

Best Practices: Not applicable – testing run.

QBInvoices2SFAcctOppD **Creates new and updates existing SF Accounts/Opportunities from R Invoices in from QB based on (the Date Range) and the primary/secondary keys selected in the ICP user configurations.**

Description: This flow will query QB Invoices on the Date Range entered in the Integration Manager Console for insertion or updating into SF Accounts and Opportunities. 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 SF due to data problems, etc.

Best Practices: Not applicable – testing run.

3.3.2.3 Scheduled Transactions

Scheduled Transactions

There are 2 scheduled transaction flows: [SFAcctOpp2QBCustInv](#) and [QBCustInvoices2SFAcctOpp](#).

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.interweave.biz and then selecting Secure Portal Login and entering your credentials.

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

SFAcctOpp2QBCustInv **Creates new and updates existing Customers and Invoices in QB from SF Accounts and Opportunities based on the primary/secondary keys selected and configuration selections in the ICP.**

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

An SF 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 SF 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 Opportunity query is also run using the same criteria as the Account query, last update date/time. Records returned from the Opportunity 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 SF, 2 in QB) every 10 minutes. In the event this transaction/connection stops in Salesforce.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 Salesforce.com (SF). The descriptions are as follows:

QBCustInvoices2SFAcctOpp

Creates new and updates existing Accounts and Opportunities in Salesforce from Customers and Invoices in Quickbooks based on the primary/secondary keys selected and configuration selections in the ICP.

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

A QB Solutions query is run to look for new and modified Solutions records. If found, these records are inserted into SF 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 SF as an Opportunity or updates to existing Opportunity record.

Best Practices: As stated above, this is a scheduled transaction executing 4 operations (2 in QB, 2 in SF) every 10 minutes. In the event this transaction/connection stops in Salesforce.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.

3.4 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 Salesforce.com to Quickbooks, ACCPAC, Oracle or MAS, or eCommerce to Inventory to Databases or Web Services - **InterWeave** 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

3.4.1 Connection Errors

Please see detail below.

3.4.1.1 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 than 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

3.4.1.2 Salesforce

Enter topic text here.

3.4.1.3 ACCPAC

Enter topic text here.

3.4.1.4 MAS 90/200

Enter topic text here.

3.4.1.5 Nexternal

Enter topic text here.

3.4.2 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 occurred 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 IWXsltImpl.execute No more DTM IDs are available- No DTM ID's available

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

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

Corrective Action: Some opportunities will be created without products. The way around this is via utility flows. Customer must run a report (weekly or monthly) to find opportunities without 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 opportunities are 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:

3.4.3 Processing Errors

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

3.4.3.1 Quickbooks

Quickbooks Processing Errors below.

3.4.3.1.1 QODBC Issued Errors

QODBC is the Software Connector / Software Driver that **InterWeave** 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 versions 2009-2002, 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.
on:

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.
on:

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.
on:

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.
on:

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.
on:

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.
on:

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.
on:

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.
on:

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.

3.4.3.1.2 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 | http://support.quickbooks.intuit.com/ |

| | | |
|-------------------|--|---|
| | [path\filename] on the host" when opening a file on a Windows Server | 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](http://support.quickbooks.intuit.com/support/pages//KnowledgeBaseArticles/1005549)

3.4.3.2 Salesforce

Refer to Salesforce

3.4.3.3 ACCPAC

Refer to Accpac

3.4.3.4 MAS 90/200

Refer to Mas

3.4.3.5 Nexternal

Refer to Nexternal

3.4.3.6 InterWeave

refer to InterWeave

Section

IV

4 Salesforce.com Glossary

Following is the Salesforce.com Glossary

A

Account

An organization, company, or consumer that you want to track - for example, a customer, partner, or competitor.

Account Assignment Rule

A rule that automatically assigns accounts to territories, based on criteria you define. See Managing Account Assignment Rules.

Account Team

An account team is a team of users that work together on an account. For example, an account team may include an executive sponsor, dedicated support representative, or project manager.

Activity (Calendar Events/Tasks)

Planned task or event, optionally related to another type of record such as an account, contact, lead, opportunity, or case.

Activity History

The Activity History related list of a record displays all completed tasks, logged phone calls, expired events, outbound emails, mass emails, emails added from Microsoft® Outlook®, and merged documents for the record and its associated records. For more information, see Using the Activity History Related List.

Administrator (System Administrator)

One or more individuals in your organization who can configure and customize the application. Users assigned to the System Administrator profile have administrator privileges.

Age

In opportunity reports, the Age of an open opportunity is the number of days since the opportunity was created. For closed opportunities, Age is the number of days between the creation date and the closed date.

In case reports, the Age of an open case is the elapsed time from creation to the present. The Age of a closed case is the elapsed time from creation to the closing time of the case. You can choose to view the Age of a case in days, hours, or minutes.

Annuity

See Quantity Schedule and Revenue Schedule.

Apex

Apex is a strongly-typed, object-oriented programming language that allows developers to execute flow and transaction control statements on the Force.com platform server in conjunction with calls to the Force.com API. Using syntax that looks like Java and acts like database stored procedures, Apex allows developers to add business logic to most system events, including button clicks, related record updates, and Visualforce pages. Apex scripts can be initiated by Web service requests and from triggers on objects. See [What is Apex?](#).

Force.com AppExchange

Force.com AppExchange is an on-demand application-sharing service from salesforce.com that allows you to browse, install, and share apps and components stored in packages and built for the Force.com platform. See [Packaging Concepts](#) for definitions of other Force.com AppExchange terminology.

Force.com App Menu

The Force.com app menu enables users to switch between customizable applications (or "apps") with a single click. The Force.com app menu displays at the top of every Salesforce page. See [What is an App?](#).

Force.com AppExchange Upgrades

Upgrading an app is the process of installing a newer version. See [Packaging Concepts](#) for definitions of other Force.com AppExchange terminology.

Approval Process

An approval process is an automated process your organization can use to approve records in Salesforce. An approval process specifies the steps necessary for a record to be approved and who must approve it at each step. A step can apply to all records included in the process, or just records that have certain attributes. An approval process also specifies the actions to take when a record is approved, rejected, recalled, or first submitted for approval. For definitions of other approval process items, see [Approval Process Terminology](#).

Apps

See [Custom Apps](#).

Asset

A specific model or type of product that a customer owns. Depending on how your organization uses assets, they can represent your products that the customer has purchased and installed or your competitor's products that the customer uses.

Auto Number

A custom field type that automatically adds a unique sequential number to each record. These fields are read only.

Auto-Response Rules

A set of conditions based on any attribute of a case that determines the email template to use when

responding to cases captured online via Web-to-Case or via Email-to-Case. Auto-response rules are also available for leads to specify the email template to use when responding to leads captured online via Web-to-Lead.

B

Best Case Amount

Revenue projection in a forecast that identifies total "possible" revenue for a specific month or quarter. For managers, this should equal the total amount of revenue they and their entire team might possibly generate.

Boolean Operators

You can use Boolean operators in report filters to specify the logical relationship between two values. For example, the AND operator between two values yields search results that include both values. Likewise, the OR operator between two values yields search results that include either value. See *Entering Filter Criteria* for instructions on using AND and OR operators in report filters.

Briefcase

The set of data that you can manage offline using Connect Offline.

Business Account

A company or organization that you want to track. For more information, see *What is an Account?*.

C

Campaign

A marketing initiative, such as an advertisement, direct mail, or conference, that you conduct in order to generate prospects and build brand awareness.

Campaign Hierarchy

A set of up to five campaigns organized into a hierarchy. A parent campaign can have several child campaigns, but a child campaign can have only one parent.

Campaign Member

Any lead or contact associated with a campaign.
Campaign ROI (Return On Investment)

The campaign ROI is the return on your marketing investment. Use the Campaign ROI Analysis Report to analyze the ROI. The ROI is calculated as the net gain (Total Value Won Opps - Actual Cost) divided by the Actual Cost. The ROI result is expressed as a percentage.

Case

Detailed description of a customer's feedback, problem, or question. Used to track and solve your customers' issues.

Category

A label you can apply to a solution to group similar solutions together. Solution categories help customer support representatives find solutions faster when solving cases. If you use the Self-Service portal or the Public Knowledge Base, your customers can browse solutions by category to find what they need.

See also Parent Category.

Clone

Button or link that allows you to create a new item by copying the information from an existing item, for example, a contact or opportunity.

Collapsible Sections

Sections on detail pages that users can hide or show.

Commit Amount

Amount entered in a forecast that an individual salesperson is reasonably confident of closing in a particular month or quarter. For managers, this should equal the amount that they and their team can confidently close.

Competitors

Related list that displays competitor names, strengths, and weaknesses entered for a specific opportunity.

Computer-Telephony Integration (CTI)

The linkage between a telephone system and a computer that facilitates incoming- and outgoing-call handling and control.

Connect for Lotus Notes

Force.com Connect for Lotus Notes is an add-in for IBM® Lotus Notes® that allows you to interact with Salesforce conveniently from Lotus Notes. Connect for Lotus Notes adds new commands to the Actions and right-click menus in your Lotus Notes user interface.

For more information, see [What is Force.com Connect for Lotus Notes?](#).

Connect for Office

Product that allows you to integrate Salesforce with Microsoft Word and Excel. See [What is Force.com Connect for Microsoft® Office?](#).

Connect for Outlook

Force.com Connect for Microsoft® Outlook is an add-in for Microsoft® Outlook® that allows you to interact with Salesforce conveniently from Outlook. Connect for Outlook adds buttons and options to your Outlook user interface.

For more information, see [What is Force.com Connect for Microsoft® Outlook?](#).

Connect Offline

Product that allows salespeople to use Salesforce to update their data remotely, anywhere, anytime - totally unplugged. See [What is Force.com Connect Offline?](#)

Console

A page that combines related records into one screen with different frames so that users can view and edit information all in one place. For more information, see [What is the Console?](#)

Console Layout

Objects chosen by an administrator to display in the list view frame of the console. For example, if an administrator adds cases to a console layout, then users whose profiles are assigned to that console layout can see list views of cases in the console's list view frame. For more information, see [Managing Console Layouts](#).

Contact

Information stored about the individuals associated with your accounts.

Contact Role

The role that a contact plays in a specific account, contract, or opportunity, such as "Decision Maker" or "Evaluator." You can mark one contact as the "primary" contact for the account, contract, or opportunity. A contact may have different roles in various accounts, contract, or opportunities.

Contract

A written agreement defining the terms of doing business between two or more parties.

Controlling Fields

Any standard or custom picklist or checkbox field whose values control the available values in one or more corresponding dependent fields.

Convert

Button or link that allows you to change a qualified lead into an account, contact, and, optionally, an opportunity. Information from the lead fields is transferred into the appropriate account, contact, and opportunity fields.

Cookies (security)

Client-specific data used by some web applications to store user and session-specific information. Salesforce issues a session "cookie" only to record encrypted authentication information for the duration of a specific session.

CTI Adapter

A light-weight software program that controls the appearance and behavior of a Salesforce SoftPhone. The adapter acts as an intermediary between a third-party CTI system, Salesforce, and a Salesforce Call Center user. It must be installed on any machine that needs access to Salesforce Call Center

functionality. For more information, see [Deploying Adapters to Call Center Machines](#).

Custom Fields

Fields that can be added in addition to the standard fields to customize Salesforce for your organization's needs.

Custom Help

Customized help text that you can provide for components that are unique to your organization, such as custom fields and custom objects. For more information, see [About Custom Help](#).

Custom Links

Custom URLs defined by administrators to integrate your Salesforce data with external websites and back-office systems. Formerly known as web links.

Custom Objects

Custom records that allow you to store information unique to your organization.

Custom Report Types

Custom report types allow you to define report criteria from which users can run and create custom reports. With custom report types, you can enable users to create reports from predefined standard and custom objects, object relationships, and standard and custom fields that you specify. For more information, see [What is a Custom Report Type?](#).

Custom S-Control

Custom web content for use in custom links. Custom s-controls can contain any type of content that you can display in a browser, for example a Java applet, an Active-X control, an Excel file, or a custom HTML web form.

Customizable Forecasting

A revised forecasting module that allows organizations to customize forecasts for their organization's business process.

Custom Apps

An "app" is a group of tabs that works as a unit to provide application functionality. Salesforce provides standard apps such as Sales and Call Center. You can customize the standard apps to match the way you work.

In addition, you can package an app and upload it to Force.com AppExchange along with other related components such as custom fields, custom tabs, or custom objects. Then, you can make the app available to other Salesforce users from AppExchange.

Custom View

See [Custom View](#).

D

Dashboard

Dashboards are visual representations of your custom report data. You can create several dashboard components within a dashboard to give you a real-time snapshot of corporate metrics and key performance indicators.

Dated exchange rates

Dated exchange rates allow you to map a currency conversion rate to a specific date range. For example, the exchange rate on January 1 was 1 USD to 1.39 AUD, but on February 1, it changed to 1 USD to 1.42 AUD. Your opportunities that closed between January 1 and February 1 use the first exchange rate (1 = 1.39), while opportunities that closed after February 1 used the second exchange rate (1 = 1.42).

Decimal Places

Parameter for number, currency, and percent custom fields that indicates the total number of digits you can enter to the right of a decimal point, for example, 4.98 for an entry of 2. Note that the system rounds the decimal numbers you enter, if necessary. For example, if you enter 4.986 in a field with Decimal Places of 2, the number rounds to 4.99.

Detail

Information displayed for specific accounts, contacts, opportunities, and other records. The detail page of a record allows you to view the information, whereas the edit page allows you to modify it.

Also, a term used in reports to distinguish between summary information and inclusion of all column data for all information in a report. You can toggle the Show Details/Hide Details button to view and hide report detail information.

Detail View

The console's center frame which is the detail page view of any record selected from any of the console's other frames. The detail view displays the same page layouts defined for the object's detail pages. When a record is displayed in the detail view, it is highlighted in the list view.

Dependent Fields

Any custom picklist or multi-select picklist field that displays available values based on the value selected in its corresponding controlling field.

Developer Edition

Product designed for developers to extend, integrate, and develop with the Salesforce platform. See Developer Edition for more information.

Document Library

A place to store documents without attaching them to accounts, contacts, opportunities, or other records.

E

Email template

A form email that communicates a standard message, such as a welcome letter to new employees or an acknowledgement that a customer service request has been received. Email templates can be personalized with merge fields, and can be written in text, HTML, or custom format.

Enterprise Edition

Product designed for larger, more complex businesses. See Enterprise Edition.

Event

An event is an activity that has a scheduled time. For example, a meeting, or a scheduled phone call.

Event Series

An event series is a group of events that recur with a regular pattern. For example, you may have a weekly meeting with a customer defined as an event series.

F**Field-Level Help**

Custom help text that you can provide for any custom field. It displays when users mouse over the help icon adjacent to that field.

Field-Level Security

Settings that determine whether fields are hidden, visible, read only, or editable for users based on their profiles. Available in Enterprise, Unlimited, and Developer Editions only.

Fiscal Year

A period that an organization uses for financial planning purposes, such as forecasting, whose length is usually similar to the length of a calendar year. Fiscal years usually contain smaller fiscal periods, such as quarters or trimesters.

Folder

A central place to store documents, email templates, and reports. Folders are available for all organizations. Report and document folders are not available in Personal Edition.

Forecast Category

Determines the category to which an opportunity is attributed in a forecast. The default category setting for an opportunity is tied to its stage, as set in the Stage picklist. To update the Forecast Category for a particular opportunity, you must edit that opportunity's forecast.

Forecast User

A user who can see and work with forecasts below them in either the forecast hierarchy or territory hierarchy.

Forecasts

Projections of sales based on the organization's fiscal year.

Formula Field

A type of custom field. Formula fields automatically calculate their values based on the values of merge fields, expressions, or other values.

Function

Built-in formulas that you can customize with input parameters. For example, the DATE function creates a date field type from a given year, month, and day.

G**Google AdWords**

Google AdWords™ (<http://adwords.google.com>) is an online advertising service used to create advertisements that display on major search engines, including Google. Many Salesforce customers advertise online with Google AdWords as a mechanism to generate leads.

Google Apps

Google Apps™ is a suite of on-demand communication and collaboration services hosted by Google and designed for business users. Salesforce integrates key Google Apps services and provides several AppExchange apps that enhance and customize Google-related functionality. See About Google Apps.

Google Docs

Google Docs™ allows you to create on-demand documents, spreadsheets, and presentations, edit them in your browser, and work together in real time with other collaborators. See Using Google Docs in Salesforce.

Google Talk

Google Talk™ is Google's instant-messaging tool. When the Google Talk Sidebar Component is activated in Salesforce, Google Talk displays below the sidebar search fields where it can be toggled on, off, or expanded into its own window. You can also log a chat record as an activity on a Salesforce lead or contact record. See Activating Google Docs in Salesforce.

Gmail

Gmail™ (also called Google Mail) is a free Web-based email service from Google that operates on all standard browsers and can be used with your company's domain. See Using Gmail in Salesforce.

Gregorian Year

A calendar based on a twelve month structure used throughout much of the world.

Group

A groups is a set of users. Groups can contain individual users, other groups, or the users in a role. Groups can be used to help define sharing access to data or to specify which data to synchronize when using Connect for Outlook or Connect for Lotus Notes.

Users can define their own personal groups. Administrators can create public groups for use by everyone in the organization.

Group Edition

A product designed for small businesses and workgroups with a limited number of users. See Group Edition.

Group Event

A planned event to which multiple users are invited, also referred to as a meeting. You can create group events by inviting other users to any calendar event you create.

Group Task

A task that was assigned to multiple users when it was created. Note that group tasks are independent records that are not linked; they can be edited, transferred, or deleted individually. For more information, see [Creating Group Tasks](#).

H

Home Tab

Starting page from which users can choose sidebar shortcuts and options, view current tasks and activities, or select another tab.

Hover Details

Hover details display an interactive overlay containing detailed information about a record when users mouse over a link to that record in the Recent Items list on the sidebar or in a lookup field on a record detail page. Users can quickly view information about a record before clicking View for the record's detail page or Edit for the edit page. The fields displayed in the hover details are determined by the record's mini page layout. To configure your mini page layouts, see [Defining Mini Page Layouts](#). The fields that display in document hover details are not customizable. To enable or disable hover details for your organization, see [Customizing User Interface Settings](#).

I

Immediate Action

A workflow action that executes instantly when the conditions of a workflow rule are met. See [Managing Workflow Rules](#).

ISO Code

The International Organization for Standardization country code, which represents each country by two letters.

J

Junction Object

A junction object is a custom object with two master-detail relationships. Using a custom junction object, you can model a "many-to-many" relationship between two objects. For example, you may have a custom object called "Bug" that relates to the standard case object such that a bug could be related to multiple cases and a case could also be related to multiple bugs.

See [Creating a Many-to-Many Relationship](#).

K

No Glossary items for this entry.

L**Layout**

See [Page Layout](#).

Lead

Information on a potential sales opportunity or prospect; individuals who have expressed some interest in your product or company.

Length

Parameter for custom text fields that specifies the maximum number of characters (up to 255) that a user can enter in the field.

Parameter for number, currency, and percent fields that specifies the number of digits you can enter to the left of the decimal point, for example, 123.98 for an entry of 3.

Letterhead

Determines the basic attributes of an HTML email template. Users can create a letterhead that includes attributes like background color, logo, font size, and font color.

List Price

The price of a product in a custom price book.

List View

A list display of items (for example, accounts or contacts) based on specific criteria. Salesforce provides some predefined views, and you can create your own custom views, too.

In the console, the list view is the top frame that displays a list view of records based on specific criteria. The list views you can select to display in the console are the same list views defined on the tabs of other objects. You cannot create a list view within the console. For more information, see [Using the Console List View](#).

Local name

The value stored for the field in the user's or account's language. The local name for a field is associated with the standard name for that field.

Locale

The country or geographic region in which the user is located. The setting affects the format of date and number fields, for example, dates in the English (United States) locale display as 06/30/2000 and as 30/06/2000 in the English (United Kingdom) locale.

In Professional, Enterprise, Unlimited, and Developer Edition organizations, a user's individual Locale setting overrides the organization's Default Locale setting. In Personal and Group Edition organizations, the organization-level locale field is called Locale, not Default Locale.

Long Text Area

Data type of custom field that allows entry of up to 32,000 characters on separate lines.

Lookup Dialog

Popup dialog available for some fields that allows you to search for a new item, such as a contact, account, or user. See Lookup Search Fields for information on which fields you can search via the lookup dialog. In addition, if the Quick Create section is enabled for all tab home pages (see Customizing User Interface Settings), you can create new records in the lookup dialog.

Lookup Field

A type of field that contains a linkable value to another record. You can display lookup fields on page layouts where the object has a lookup or master-detail relationship with another object. For example, cases have a lookup relationship with assets that allows users to select an asset using a lookup dialog from the case edit page and click the name of the asset from the case detail page.

Lookup Relationship

A relationship between two records so you can associate records with each other. For example, cases have a lookup relationship with assets that lets you associate a particular asset with a case. On one side of the relationship, a lookup field allows users to click a lookup icon and select another record from a popup window. On the associated record, you can then display a related list to show all of the records that have been linked to it. A lookup relationship has no effect on record deletion or security, and the lookup field is not required in the page layout. For more information on relationships, see Overview of Relationships.

M**Mail Merge**

A mail merge is the process of generating form letters and other Microsoft Word documents that are personalized for the recipient, who is often a contact or lead. The content of each document is predefined in a mail merge template. Mail merge templates include variables called merge fields where data from your Salesforce records—for example a contact's name and address—displays in the generated document. For more information, see Mail Merge Overview.

Marketing User

One or more individuals in your organization who can manage campaigns. Administrators can designate someone as a Marketing User by selecting the Marketing User checkbox in the user's personal information.

Only Marketing Users have access to create, edit, and delete campaigns and configure advanced campaign setup.

In order to use the campaign import wizards, Marketing Users must also have the Marketing User profile (or the "Import Leads" permission).

Master-Detail Relationship

A relationship between two different types of records that associates the records with each other. For example, accounts have a master-detail relationship with opportunities. This type of relationship affects record deletion, security, and makes the lookup relationship field required on the page layout. For more information on relationships, see Overview of Relationships.

Master Picklist

A complete list of picklist values available for a record type or business process.

Member Status

The status of a lead or contact in relation to a campaign. For example, a lead or contact could have a member status of "Planned," "Sent," or "Responded" at different stages of an email campaign.

Merge Field

A field you can place in an email template, mail merge template, custom link, or formula to incorporate values from a record. For example, Dear {!Contact.FirstName}, uses a contact merge field to obtain the value of a contact record's First Name field to address an email recipient by his or her first name. For more information, see About Merge Fields.

Mini Page Layout

A subset of the items in a record's existing page layout that administrators choose to display in the console's Mini View and in Hover Details. Mini page layouts inherit record type and profile associations, related lists, fields, and field access settings from the page layout. For more information, see Defining Mini Page Layouts.

Mini View

The console's right frame which displays the records associated with the record displayed in the detail view. The fields displayed in the mini view are defined in the mini page layouts by an administrator. The mini view does not display if the record in the detail view does not have any records associated with it.

N

Notes

Miscellaneous information pertaining to specific accounts, contacts, leads, and opportunities.

O**Object**

An object allows you to store information in your Salesforce organization. The object is the overall definition of the type of information you are storing. For example, the case object allow you to store information regarding customer inquiries. For each object, your organization will have multiple records that store the information about specific instances of that type of data. For example, you might have a case record to store the information about Joe Smith's training inquiry and another case record to store the information about Mary Johnson's configuration issue.

Object-Level Help

Custom help text that you can provide for any custom object. It displays on custom object record home (overview), detail, and edit pages, as well as list views and related lists.

On-Demand Document

Documents that are hosted by an application service provider and accessed via the Internet. Google's Google Docs service provides on-demand documents.

Opportunities

Information on specific sales and pending deals that you want to track.
Organization

A deployment of the Salesforce application with a defined set of licensed users.

Overlay

An overlay displays additional information when you mouse over certain user interface elements. Depending on the overlay, it will close when you move your mouse away, click outside of the overlay, or click a close button.

Owner

Individual user to which a record (for example, a contact or case) is assigned.

P**Page Layout**

The organization of fields, custom links, and related lists on a record detail or edit page. Use page layouts primarily for organizing pages for your users. In Enterprise, Unlimited, and Developer Editions, use field-level security to restrict users' access to specific fields.

Parent Account

Organization or company that an account is affiliated with or owned by. By specifying a parent for an account, you can get a global view of all parent/subsidiary relationships using the View Hierarchy link.

Parent Category

The category directly above the category to which a solution belongs. See [Category](#) for more information.

Partner

Partners are the companies with which you collaborate to close your sales deals. For each opportunity or account you create, the Partners related list allows you to store information about your partners and the roles they play in the opportunity or account. A partner must be an existing account within Salesforce. Selecting a partner role automatically creates a reverse partner relationship with the associated account so that both accounts list the other account as a partner.

Partner Accounts

Partner accounts are Salesforce accounts that a channel manager uses to manage partner organizations, partner users, and activities when using the PRM portal or Partner Portal.

Partner Role

Selection for an account on the Partners related list of an individual account or opportunity that specifies the role that the account has in related sales deals.

Partner User

Partner users are Salesforce users with limited capabilities. They are associated with a particular partner account, have limited access to your organization's data, and log in via a PRM portal or Partner Portal.

PRM Portal

PRM portals allow partner users to log in to Salesforce through a Web portal rather than through salesforce.com.

Percent (%) Quota

Calculated value in forecasts that indicates what percentage of the quota a salesperson is confident of closing. This amount is the Commit Amount divided by the Quota.

Person Account

A person account is an individual consumer with whom you do business, such as a financial services client, an online shopper, or a vacation traveler. Person accounts are applicable to organizations that operate on a business-to-consumer model as opposed to a business-to-business model.

For more information, see [What is a Person Account?](#).

Personal Edition

Product designed for individual sales representatives and single users. See [Personal Edition](#) for more information.

Personal Information

User information including personal contact information, quotas, personal group information, and default sales team.

Picklist

Selection list of options available for specific fields, for example, the Industry field for accounts. Users can choose a single value from a list of options rather than make an entry directly in the field. See also Master Picklist.

Picklist (Multi-Select)

Selection list of options available for specific fields. Multi-select picklists allow users to choose one or more values. Users can choose a value by double clicking on it, or choose additional values from a scrolling list by holding down the Control key while clicking a value and using the arrow icon to move them to the selected box.

Picklist Values

Selections displayed in drop-down lists for particular fields. Some values come predefined, and other values can be changed or defined by an administrator.

Pipeline

Calculated amount of open opportunities that have a close date within the quarter. Displays on forecast detail and edit pages. For managers, this amount includes open opportunities for them and their entire team.

Price Book

A list of products that your organization sells. Available in Professional, Enterprise, Unlimited, and Developer Editions only.

Primary Contact

Field in company information that lists the primary contact for your organization.

Also indicates the primary contact associated with an account, contract, or opportunity. Specified as a checkbox in the Contact Roles related list of an account, contract, or opportunity.

Primary Partner

Partner account designated as playing a key role in closing an opportunity. Specified as a checkbox in the Partners related list of an opportunity.

Printable View

An option that displays a page in a print-ready format. See How do I print Salesforce records?.

Probability

Percentage estimate of the confidence in closing a specific opportunity. Probability is linked to opportunity Stage.

Professional Edition

Product designed for businesses who need full-featured CRM functionality. See Professional Edition.

Product

Any item or service your organization sells. Products are defined within a price book, and can be added to opportunities. Available in Professional, Enterprise, Unlimited, and Developer Editions only.

Product Family

A picklist field on products that you can customize to categorize types of products.

Profile

Defines a user's permission to perform different functions within Salesforce. For example, the Solution Manager profile gives a user access to create, edit, and delete solutions.

Public Calendar

A calendar in which a group of people can track events of interest to all of them (such as marketing events, product releases, or training classes) or schedule a common activity (such as a team vacation calendar). For example, your marketing team can set up an events calendar to show upcoming marketing events to the entire sales and marketing organization.

Q**Quantity Schedule**

Outlines the dates, number of units (i.e., quantity), and number of installments for billing or shipping a product. Your organization can decide exactly how to use schedules. Available in Enterprise, Unlimited, and Developer Editions only.

Queue

A holding area where you can put cases, leads, or custom objects to help you manage your workload or differentiate between levels of support.

Quantity Forecasting

Forecasting based on the projected number of units sold.

Quota

The sales goal assigned to a user on a monthly and quarterly basis. A manager's quota should equal the amount she and her team are expected to generate together.

R**Read Only**

One of the standard profiles to which a user can be assigned. Read Only users can view and report on information based on their role in the organization. (That is, if the Read Only user is the CEO, they can view all data in the system. If the Read Only user has the role of Western Rep, they can view all data for their role and any role below them in the hierarchy.)

Recent Items

List of links in the sidebar for most recently accessed records. Note that not all types of records are listed in the recent items.

Record

Term used to describe information stored in the database. Corresponds to the entry of a particular item, for example, an account, opportunity, or case.

Record Type

A field available for certain records that can include some or all of the standard and custom picklist values for that record. Record types are special fields that you can associate with profiles to make only the included picklist values available to users with that profile.

Recurring Event

An event that has been created as part of an event series, such as a series of weekly meetings or monthly status reports. See Event Series.

Recycle Bin

Page that lets you view and restore deleted information. Access the Recycle Bin via the link in the sidebar.

Related List

Section of a record or other detail page that lists items related to that record. For example, the Stage History related list of an opportunity or the Open Activities related list of a case.

Related List Hover Links

If enabled by your administrator, related list hover links display at the top of each detail page. Hover the pointer over a related list hover link to display the corresponding related list and its number of records in an interactive overlay that allows you to quickly view and manage the related list items. You can also click a related list hover link to jump down to the content of the related list without having to scroll down the page.

Related Object

Objects chosen by an administrator to display in the console's mini view when records of a particular type are shown in the console's detail view. For example, when a case is in the detail view, an administrator can choose to display an associated account, contact, or asset in the mini view. For more information, see *What is the Console?*.

Relationship

A connection between two data-storage objects, used to create related lists in page layouts and detail levels in reports. Matching values in a specified field in both objects are used to link related data; for example, if one object stores data about companies and another object stores data about people, a relationship would allow you to find out which people work at the company.

Relationship Group

Relationship groups are custom object records used to store collections of accounts. For more information, see About Relationship Groups.

Relationship Group Member

The accounts that you add to relationship groups are called relationship group members. For more information, see About Relationship Group Members.

Report

Information you can display or print that provides a summary of your data.

Resource Calendar

A calendar in which multiple people can coordinate their usage of a shared resource such as a conference room or printer.

Revenue Schedule

Outlines the dates, revenue amounts, and number of installments for billing or recognizing revenue from a product. Your organization can decide exactly how to use schedules. Available in Enterprise, Unlimited, and Developer Editions only.

Revenue Forecasting

Forecasting based on projected revenue amounts.

Role

Assigned responsibility of a user, partner account, or contact for specific accounts and opportunities. Administrators can define user roles in the organization setup. Individual users can assign specific partner and contact roles for accounts and contacts.

S

S-control

Custom web content for use in custom links. Custom s-controls can contain any type of content that you can display in a browser, for example a Java applet, an Active-X control, an Excel file, or a custom HTML web form.

Salesforce Call Center

A Salesforce feature that seamlessly integrates Salesforce with third-party computer-telephony integration (CTI) systems. For more information, see [What is Salesforce Call Center?](#).

Salesforce Content

An on-demand, content-management system that allows you to organize, share, search, and manage content within your organization and across key areas of the Salesforce application. Content can include all file types, from traditional business documents such as Microsoft PowerPoint® presentations to

audio files, video files, and Web pages.

Salesforce Mobile

Salesforce Mobile is a Salesforce feature that enables users to access their Salesforce data from mobile devices running the mobile client application. The Salesforce Mobile client application exchanges data with Salesforce over wireless carrier networks, and stores a local copy of the user's data in its own database on the mobile device. Users can edit local copies of their Salesforce records when a wireless connection is unavailable, and transmit those changes when a wireless connection becomes available. See *What is Salesforce Mobile?*.

Sales Price

The price of a product on an opportunity. This can be different than the product's standard or list price.

Sales Team

A sales team is a set of users that normally work together on sales opportunities. A typical sales team might include the account manager, the sales representative, and a pre-sales consultant. You can specify the sales team for each opportunity that you own.

Salesforce for Google AdWords

Salesforce for Google AdWords is a Force.com AppExchange app that connects Google AdWords with Salesforce, allowing you to track the effectiveness of your online advertising investments.

Save As

Option on any standard, public, or custom report to save the parameters of the report without altering the original report. It creates a new custom report with your saved changes.

Save & New

Alternative "save" on most pages with which you can save your current changes and create a new entry.

Schedule

See *Quantity Schedule* and *Revenue Schedule*.

Search

Feature that lets you search for information that matches specified keywords. You can enter a search from the Search section of the sidebar column, or perform an Advanced Search by clicking *Advanced Search* in the sidebar.

Search Condition/Criteria

Condition on particular fields that qualifies items to be included in a list view or report, for example, "State equals California."

Search Layout

The organization of fields included in search results, in lookup dialogs, and in the key lists on tab home

pages.

Self-Service

A web portal feature that allows your customers to search your organization's knowledge base to find answers to their questions and to submit new cases to your customer support team.

Sharing

Allowing other users to view or edit information you own. There are different ways to share data:

- * Sharing Model - defines the default organization-wide access levels that users have to each other's information and whether to use the hierarchies when determining access to data.
- * Role Hierarchy - defines different levels of users such that users at higher levels can view and edit information owned by or shared with users beneath them in the role hierarchy, regardless of the organization-wide sharing model settings. See Sharing Considerations for specific exceptions to this.
- * Sharing Rules - allow an administrator to specify that all information created by users within a given group or role is automatically shared to the members of another group or role.
- * Manual Sharing - allows individual users to share a specific account or opportunity with other users or groups.

Sharing Model

Behavior defined by your administrator that determines default access by users to different types of records.

Sharing Rule

Type of default sharing created by administrators. Allows users in a specified group or role to have access to all information created by users within a given group or role.

Show/Hide Details

Option available for reports that lets you show/hide the details of individual column values in report results.

Sidebar

Column appearing on the left side of each page that provides links to search, recent items, and other resources.

Sites

Force.com Sites enables you to create public websites and applications that are directly integrated with your Salesforce organization—without requiring users to log in with a username and password.

SoftPhone

The telephone interface that a call center user sees in the sidebar of a Salesforce page while using

Salesforce Call Center. For more information, see [What is Salesforce Call Center?](#).

Solution

Detailed description of the resolution to a customer issue.

Solution Manager

One or more individuals in your organization who can review, edit, publish, and delete solutions. Typically, these individuals are product experts with excellent written communication skills and advanced knowledge in a particular area of your product. When creating or editing users, assign the Solution Manager profile to give users this privilege.

Source Report

A custom report scheduled to run and load data as records into a target object for an analytic snapshot. For more information, see [What is an Analytic Snapshot?](#).

Stage Duration

In opportunity reports, the number of days the opportunity was in the stage listed in the Stage column.

Stage History

Related list on an opportunity detail page that lists changes in status and stage for the opportunity.

Standard Price

Price for a product that is included in the Standard Price Book.

Standard Price Book

Automatically generated price book containing all your products and their standard prices.

Sync Profile

Your personal settings that define what records are included when you synchronize with Connect for Outlook, Connect for Lotus Notes, or Intellisync for salesforce.com. See [Setting Your Sync Profile](#) for instructions on setting your sync profile.

Synchronize

Transfer and merge your contacts and activities with desktop applications such as Microsoft® Outlook® or IBM® Lotus Notes® .

Syndication Feeds

Give users the ability to subscribe to changes within Force.com Sites and receive updates in external news readers.

T**Tag**

1. In Salesforce, tags are words or short phrases that users can associate with most records to describe and organize their data in a personalized way. Administrators can enable tags for accounts, activities, assets, campaigns, cases, contacts, contracts, documents, events, leads, notes, opportunities, reports, solutions, tasks, and any custom objects (except relationship group members). Because tags are private, users only see the tags that they create.
2. In Salesforce Content, tags are descriptive labels that help classify and organize content across workspaces. Users can view a list of all files or Web links that belong to a particular tag or filter search results based on a tag or tags.

Tag Cloud

In Salesforce Content, the tag cloud on the workspace overview and workspace detail pages shows you how the content in your workspaces has been tagged. The tag names increase in size within the tag cloud according to popularity, meaning that the largest tags have been assigned to the most files or Web links. You can choose to sort the tags alphabetically or by popularity. The tag cloud contains the 30 most popular tags.

Tasks

See Activity

Task bar links

Links on tabbed pages that provide quick access to the most common operations available for a particular page, for example, creating a new account.

Territory

A collection of accounts and users that generates a forecast. See [What is Territory Management?](#)

Text

Data type of custom field that allows entry of any combination of letters, numbers, or symbols, up to a maximum length of 255 characters.

Text Area

Data type of custom field that allows entry of up to 255 characters on separate lines.

Text Area (Long)

See Long Text Area.

Time-Dependent Action

A workflow action that executes when the conditions of a workflow rule and an associated time trigger are met. See [Managing Workflow Rules](#).

Translation Workbench

Administration setup area where your users can translate custom field names, picklist values, record

types, and page layout sections. The translation workbench also determines which users translate different languages.

Twisties

See Collapsible Sections.

U**Unlimited Edition**

Unlimited Edition is salesforce.com's flagship solution for maximizing CRM success and extending that success across the entire enterprise through the Force.com platform. See Unlimited Edition.

V

No Glossary items for this entry.

W**Web Links**

See Custom Links.

Web-to-Case

Functionality that lets you gather customer support issues and feedback on your company's website and then generate cases using that data.

Web-to-Lead

Functionality that lets you gather registration or profile information on your company's website and then generate leads using that data.

Workflow Alert

An email template and recipient that a workflow rule uses when sending email alerts.

Workflow Rule

A set of conditions that, when met, assign tasks or send alerts in the form of email notifications.

Workflow Task

A task template that determines the details of a task that will be automatically assigned by a workflow rule.

Workspace

A file repository in Salesforce Content. See Managing Workspaces.

Workspace Permission

A group of privileges that determines user access within a Salesforce Content workspace. See

Managing Workspace Permissions.

X

No Glossary items for this entry.

Y

No Glossary items for this entry.

Z

No Glossary items for this entry.

Endnotes 2... (after index)

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