



Smart Solutions

Integrate CRM, Financial, ERP, eCommerce, Billing, Telephony, Customer Service
Smart Solutions supports your unique business needs - no software needed
Solutions configuration is done with a mouse and the web
Application and process logic is in the Solution

What are **Smart** Solutions?

Introducing **Smart** Solutions

- **InterWeave Smart** Solutions deliver a complete configurable Solutions to integrate today's popular business applications;
 - you configure, test, run.
- An alternative to inefficient program and consultant-based approaches, our next generation web-based Solutions are powerful yet easy to use, extremely affordable, and deploy in just days.
- You don't need to be a technical resource, analyst or developer.
- We supply the **Smart** Solution, the servers, the support personnel and most important; we supply the application knowledge at a process, data and technical level through years of working with them - in configurable form

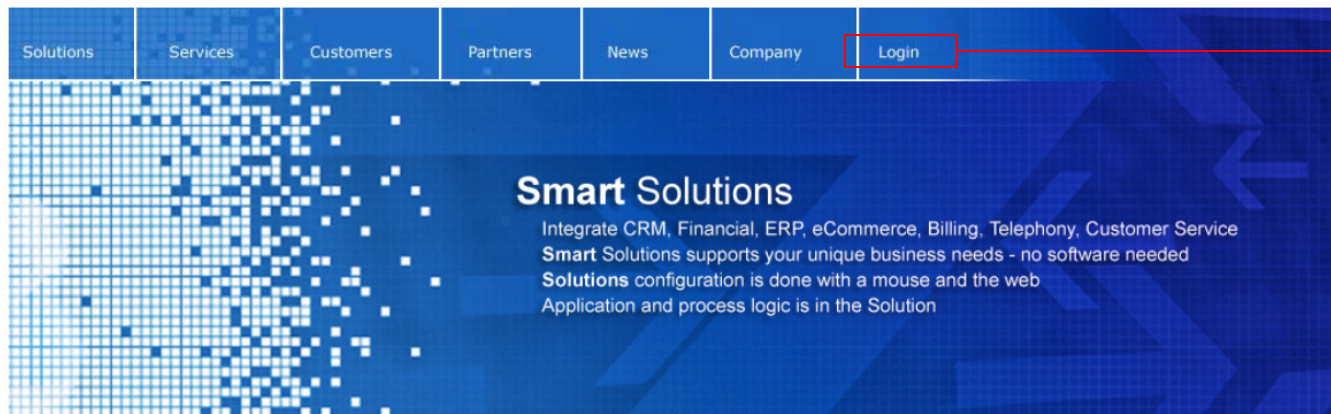
Smart Solution Categories

- **CRM** **Telephony**
- **Financial** **Customer Support**
- **ERP** **CloudConnect**®
- **eCommerce** **Payment** Gateway
- **Billing** **Database** Gateway

Smart 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
- Smart Solutions are completely configurable by the customer with picklists, drop downs or custom fields
- Start-ups, Small Business or Enterprise - select exactly the right configuration for you - modify at any time
- Extensive portfolio of Smart Solutions waiting for you to configure
- Complete outsource packages available - no software, no hardware, no developers, no overhead - just sign and go

How do I access Smart Solutions?



Go to
www.interweave.biz

Select Login

This takes you to our
Certified Managed
Services Provider -
Rackspace

- SaS 70
- Sarbanes/Oxley
- Salesforce.com
- Symantec

Introducing **Smart Solutions**

InterWeave **Smart Solutions** deliver a complete configurable Solutions to integrate today's popular business applications; you configure, test, run. An alternative to inefficient program and consultant-based approaches, our next generation web-based Solutions are powerful yet easy to use, extremely affordable, and deploy in just days.

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News

November 6, 2009
Integration Technologies announces "InterWeave SmartSupport" to support our customers popular integrated business applications.

October 22, 2009
Integration Technologies announces partnership with Intelstream, Inc., a complete Solutions provider for open source CRM, ERP and Content Management.

September 7, 2009
Integration Technologies announces Ascent, the On-demand Inventory Control and Warehouse Management native application on

Customer Success

LUX needed a luxurious SF_QB Solution that was comprehensive with outstanding service and support - we choose InterWeave



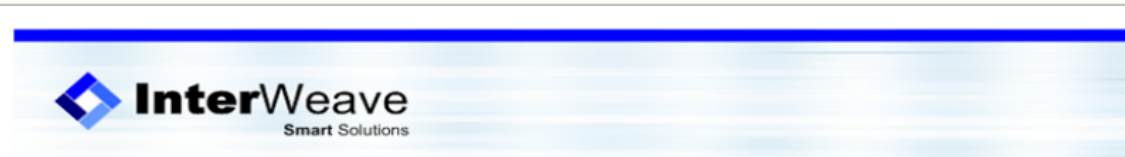
Michael Murphy, President
Luxurio.com

Read Customer Case Studies

Smart Starts

InterWeave Solutions Portal

Company Registration



Company Registration

Company/Organization

Acme Services, Inc.

Administrator's E-mail

bsmith@acmeservices.c

Administrator's First Name

Bob

Administrator's Last Name

Smith

Password

•••••

Confirm Password

•••••

Solution type

SalesForce to QuickBooks Small Business

Next

Select, New Company? Please register here – you will be taken to the Company Registration Page. Enter all information, select your Solution type (Salesforce to Quickbooks has 4 models to choose from).

Click **Next** and go to the Object Selection page of your **Smart** Solution.

InterWeave Smart Solutions

Object Selection



Please set configuration parameters for your solution.
Object Selection

Property Name	Property Value
SF Account/Contact to QB Customer/Job	Bi-directional
SF Person Account to QB Customer/Job	None
SF Account/Contact to QB Vendor	SF to QB unidirectional
SF Opportunity to QB Job	None
SF Opportunity to QB Sales Order	Bi-directional
SF Opportunity to QB Purchase Order	Bi-directional
SF Opportunity to QB Invoice	Bi-directional
SF Opportunity to QB Sales Receipt	Bi-directional
SF Opportunity to QB Estimate	None
SF Opportunity to QB Bill	None
SF Opportunity to QB Check	SF to QB unidirectional
SF Product to QB Item	QB to SF unidirectional
SF Ascent Sales Order to QB Sales Order	None
SF Ascent Item to QB Item	None

Next

You now select the object flows you want and integration direction:

- SF/QB uni-directional
- QB/SF uni-directional
- Bi-directional

Click **Next** and go to the Object Detail Selection pages of your **Smart Solution** – starting with Accounts.

InterWeave Smart Solutions

Object Detail Selection - Accounts



Please set configuration parameters for your solution.
Account Configuration Details

[Logout](#)

[InterWeave](#)

[Previous](#) [Next](#)

SF Account/Contact to QB Customer

Property Name	Property Value
Binding SF Custom Field with QB ListID	SFACCTID_c
Binding criteria (optional)	None
Binding SF Custom Field with QB Full Name	
Normalize Names for binding	Yes
SF Field with QB Customer Name	SFCUSTN_c
Primary contact selected via	Account/Contact Role
Default Primary Role Name	
Synchronize Contact Mail Address and Account Billing Address	For Primary Contact
Propagate SF Hierarchy to QB Customer/Job Hierarchy	Yes, using Custom Object
Hierarchy Level to create QB Job	
Custom Object Name to create QB Job	
SF Custom field for Customer Terms	SFCUSTTERM_c
SF Account Custom field for Total Balance	SFTOTBAL_c
SF Contact Custom field for Middle Name	SFMIDNAM_c
Permitted sub operations from SF Accounts to QB Customers	Create and Update

Account configuration details are completely configurable by the customer with picklists, drop downs or entering custom fields.

You configure your solution exactly the way you want; the work flow, business processes, etc. to work - modify at any time. Input all the custom fields you want to integrate with Salesforce and Quickbooks.

Click [Next](#) and go to the next Object Detail Selection page – Opportunities to Invoices, Sales Orders, etc.

InterWeave Smart Solutions

Object Detail Selection – Sales Orders, Invoices, Purchase Orders, etc.



Please set configuration parameters for your solution.
Transactions Configuration Details

[Logout](#) [InterWeave](#)

[Previous](#) [Next](#)

SF Opportunity to QB Sales Order

Property Name	Property Value
SF Opportunity Custom field with QB Sales Order #	SFOPPID_c
QB Sales Order # is generated by	QB
Permitted sync operations from SF Opportunities to QB Sales Orders	Create and Update
Create new QB Sales Order when	SF Opportunity is Won
SF Opportunity Stage to create new QB Sales Order	
SF Custom Field Name to create new QB Sales Order	
SF Custom Field Value to create new QB Sales Order	
Dummy Shipping and Handling QB Sales Order Item Name	SFOPPSODUMMY_c
Use Dummy Shipping and Handling for Dummy Sales Order	Yes
Populate Billing Address to QB Sales Order from	Primary Contact Mailing Address
Populate Shipping Address to QB Sales Order from	Primary Contact Mailing Address
Fill QB Sales Order Billing Street Address with	Name/Address
Fill QB Sales Order Shipping Street Address with	Name/Address
Create QB Line Item Description from SF Product Line and Product ones using	Overwrite
Filtering SF Field Name for Sales Order Operations	

Sales Order configuration details are completely configurable by the customer with picklists, drop downs or entering custom fields.

You configure your solution exactly the way you want; the work flow, business processes, etc. to work - modify at any time. Select source of data, format, etc.

Click [Next](#) and go to the next Object Detail Selection page – Products.

InterWeave Smart Solutions

Object Detail Selection – Products



Please set configuration parameters for your solution.
 Products Configuration Details

[Logout](#)

[Previous](#) [Next](#)

SF Product to QB Inventory Item

Property Name	Property Value
Binding between SF Product and QB Inventory Item	Product Name - Item Name
Custom Object Name to create QB Item	
SF Product field containing Product Group Name	SFPRODGRP_c
SF Product field containing Item Name for sub-items	SFITEM_c
SF Support for Inventory items cost required	Yes
SF Support for Item weight required	No
Initial SF to QB upload required	No
Permitted sync operations from QB Inventory Items to SF Products	Create and Update
QB Cusom Field to Suppress Transaction	
Populate SF Product Code with	Item Name
Upload Inactive QB Items	Yes

SF Price Book

Property Name	Property Value
SF Price Book Name	SFPRICE1_c

Products configuration details are completely configurable by the customer with picklists, drop downs or entering custom fields.

You configure your solution exactly the way you want; the work flow, business processes, etc. to work - modify at any time. Complete integration with Inventory and eCommerce.

Multiple Price Books, multiple Company files, etc.

Click [Next](#) and go to the next Object Detail Selection page – Credentials.

InterWeave Smart Solutions

Object Detail Selection – Credentials & Other Properties



Please set credentials for your solution.

[Logout](#)

[Previous](#) [Finish](#)

SF Credentials

Property Name	Property Value
SF Integration User	ith@acmeservices.com
SF Integration Password
Confirm SF Integration Password

QB Credentials

Property Name	Property Value
QB Integration URI	http://acmeservices/ser
QB Integration User	smith@acmeservices.c
QB Integration Password/Token
Confirm QB Integration Password/Token

Other Properties

Property Name	Property Value
QB Version/Local	USA
Environment to Connect	Production B
Multi-currency support	Convert to base currency
Extended Connection Timeout required	Yes
Start time of sleep window	0400am
End time of sleep window	0500am
Time Zone Shift	2

Credentials

Enter your:

- Salesforce User ID and Password,
- Quickbooks User ID and Password and location of the Quickbooks Company file location (Static IP address).
- Type of Quickbooks
- Multi-currency option
- Sleep window
- Time zone shift

Click [Finish](#) – your solution has been created.

InterWeave Smart Solutions

Salesforce.com Home page – Professional, Premier & Small Business Edition

The screenshot shows the Salesforce.com interface for a user named Bruce Magown at Acme Manufacturing, Inc. The page includes a navigation bar with links like Home, Accounts, Contacts, etc. A sidebar on the left contains a section titled 'Integration by InterWeave' with three links: 'SF QB Accounts', 'SF QB Invoices', and 'SF QB Products'. The main dashboard area displays three charts: 'Connection Status', 'Salesforce to Quickbooks Integration', and 'Quickbooks to Salesforce Integration'. The 'Connection Status' chart shows a 'Record Count' on the x-axis and 'Lead Source' on the y-axis, with a note 'Connection not Active'. The other two charts also show 'Record Count' vs 'Lead Source'. At the bottom, there is a calendar for November 2009, showing 'Today 11/8/2009' and 'You have no events scheduled for the next 7 days.' The page also features a 'Create New...' dropdown and 'Messages and Alerts' section.

Professional, Premier & Small Business Editions

In the top left corner of your Home Page, you will place 3 links that, when clicked, will start the Solution at object level with the configuration you have selected;

- SF QB Accounts
- SF QB Opportunities
- SF QB Products

Every time you click, the Solution will start and complete - its that easy.

InterWeave Smart Solutions

InterWeave Integration Manager – Enterprise Edition

Enterprise Edition

The **Integration Manager** manages and monitors Data and Connection in real-time. Features are:

- Scheduled Transactions
- Utility Transactions
- Real-time email or IM notification
- Log Viewer

Scheduled Transactions

- just set the Interval time you want the flow to fire (ex. SF Accounts to QB Customers – every 3 minutes) and its fires.
- If there a data error, you are sent an email or just click on Runs – and there is the error in the Log Viewer.

Utilities

- for single flow testing of configuration selections, or
- bulk data loading.

The screenshot shows the 'InterWeave Integration Manager' interface. At the top, there is a navigation bar with 'IW Monitor', 'Logout', and 'InterWeave' links. Below this is a section titled 'Configure Transactions to Start' with a 'Refresh' button. The main content is a table with columns: Transaction Flow Id, Start Transaction Name, Start/Stop, State, Scheduled, Single Run, Interval, Shift, Query Starts, Counter, and Runs. The table is divided into two sections: 'Scheduled Transaction Flows' and 'Utility Transaction Flows'. Each row includes a checkbox for 'START', a 'State' (STOPPED), a 'Scheduled' status (green circle), a 'Single Run' status (radio button), an 'Interval' value, a 'Shift' value, a 'Query Starts' timestamp, a 'Counter' value, and a 'Runs' status (0/0). Red arrows from the text on the left point to specific rows in the table.

Transaction Flow Id	Start Transaction Name	Start/Stop	State	Scheduled	Single Run	Interval	Shift	Query Starts	Counter	Runs
Scheduled Transaction Flows										
QBCustInvoices2SFActOpp	GetQBUpdatedCustS	<input type="checkbox"/> START	STOPPED	🟢	🔴	600000	0	2006-07-18 22:48:39.€	0	0/0
QBCustSO2SFActOpp	GetQBUpdatedCustS	<input type="checkbox"/> START	STOPPED	🟢	🔴	600000	0	2006-07-18 22:48:39.€	0	0/0
QBItem2SFProd	GetQBProducts	<input type="checkbox"/> START	STOPPED	🟢	🔴	60000	0	2006-11-08 09:24:39.€	0	0/0
SFActOpp2QBActInv	SFLogin_CM	<input type="checkbox"/> START	STOPPED	🟢	🔴	600000	0	2006-06-29 09:00:00.C	0	0/0
SFActOpp2QBActSO	SFLogin_CM	<input type="checkbox"/> START	STOPPED	🟢	🔴	600000	0	2006-06-29 09:00:00.C	0	0/0
SFProd2QBItem	SFLogin_CM	<input type="checkbox"/> START	STOPPED	🟢	🔴	3600000	0	2006-06-29 09:00:00.C	0	0/0
Utility Transaction Flows										
QBCust2SFActDR	GetQBUpdatedCustDR	<input type="checkbox"/> START	STOPPED	🟢	🟢	-600000	0	2007-04-24 14:24:04.5	0	0/0
QBCust2SFActDRS	GetQBUpdatedCustDRS	<input type="checkbox"/> START	STOPPED	🟢	🔴	1000	0	2007-04-24 14:24:04.5	0	0/0
QBCust2SFActNF	GetQBUpdatedCustF	<input type="checkbox"/> START	STOPPED	🟢	🔴	0	0	2007-04-24 14:24:04.5	0	0/0
QB_Cust2SFActBind	GetQB_Cust2BndSF	<input type="checkbox"/> START	STOPPED	🟢	🔴	1000	0	2006-06-29 09:00:00.C	0	0/0
QBInvoices2SFActOppDR	GetQBInvoice	<input type="checkbox"/> START	STOPPED	🟢	🟢	-600000	0	2006-07-18 22:48:39.€	0	0/0
QBInvoices2SFActOppN	GetQBInvoicesN	<input type="checkbox"/> START	STOPPED	🟢	🔴	0	0	2006-11-08 09:24:39.€	0	0/0
QBItem2SFProdDR	GetQBProductsDR	<input type="checkbox"/> START	STOPPED	🟢	🔴	0	0	2006-11-08 09:24:39.€	0	0/0
QBItem2SFProdDRS	GetQBProductsDRS	<input type="checkbox"/> START	STOPPED	🟢	🔴	1000	0	2006-11-08 09:24:39.€	0	0/0
QBItem2SFProdN	GetQBProductsN	<input type="checkbox"/> START	STOPPED	🟢	🔴	0	0	2006-11-08 09:24:39.€	0	0/0
QBSO2SFActOppDR	GetQBSODR	<input type="checkbox"/> START	STOPPED	🟢	🟢	-60000	0	2006-07-18 22:48:39.€	0	0/0
QBSO2SFActOppN	GetQBSON	<input type="checkbox"/> START	STOPPED	🟢	🔴	0	0	2006-07-18 22:48:39.€	0	0/0

Transaction Flow: QBCust2SFActBind

Creates new and updates existing accounts, sales receipts, and invoices in QB from Customers and Orders in SF on timely basis. Initial QueryStartTime must be set. Must work in scheduled over the interval mode.

Property Name	Property Value
BatchSize	200

InterWeave Smart Solutions

Thank you

We hope you enjoyed the presentation

As you can see, we're a lot more than just a widget or a program;
Smart Solutions are robust, configurable and ready.

Feel free to call Bruce Magown, CEO, direct at 203 274 5226 or email us at sales@interweave.biz. We look forward to meeting you.

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Integration
TECHNOLOGIES

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