



Creatio_Sage Intacct Integration Planning Survey

Integration Technologies, Inc.

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V4.02

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Creatio_Sage Intacct Integration Planning Survey

Thank you for subscribing to **InterWeave** from Integration Technologies, Inc.

The following information will help us help you implement and use your **InterWeave** Solution to your company's best advantage. We look forward to working with you.

Expectations	
What is your definition of a successful project?	
What has made this project a key initiative?	
Who is responsible for those results?	Name: Email: Phone:
Do you need assistance?	
In the optimization or deployment of Creatio?	Contact: Name: Tel:
Do you need help in the defining of the requirements of the integration?	Contact:
Who's Who	
What is your company's name?	
Who is the Creatio administrator in your company?	Name: Email: Phone:
Who is the Sage Intacct administrator in your company?	Name: Email: Phone:
Who will be the InterWeave administrator in your company?	Name: Email: Phone:

<p>Who will be the InterWeave integration user (a Creatio user with admin capability) in your company?</p> <p>Important Note: For real-time, bi-directional integration, the Creatio License that will be dedicated to the integration, will not be active in the daily Creatio to Sage Intacct transactions because any changes (creation, updating and so on) in Creatio and/or in Sage Intacct will not be moved over by Integration Solution (InterWeave) and will not be used in production flows due to the Repetition Protection feature of the Solution. If doing batch (evening processing) of transactions, this does not apply.</p>	<p>Name:</p> <p>Email:</p> <p>Phone:</p>
<p>Who provides IT support for your company?</p> <p>Is this a staff person [] or contracted []?</p>	<p>Name:</p> <p>Email:</p> <p>Phone:</p>
<p>Who should receive our Subscription Contract and Invoice for InterWeave?</p>	<p>Name:</p> <p>Email:</p> <p>Phone:</p>
<p>Who should receive InterWeave Support Bulletin emails?</p>	<p>Name:</p> <p>Email:</p> <p>Phone:</p>
<p>Who should have access to the InterWeave Support web site?</p>	<p>Name:</p> <p>Email:</p> <p>Phone:</p>
Sage Intacct Configuration	
<p>How long have you been using Sage Intacct?</p>	<p>___ Years</p> <p>___ Months</p>
<p>How many Sage Intacct licenses do you have?</p>	<p>___ Licenses</p>
<p>Please list any shopping cart, shipping, or other third-party systems that Sage Intacct is integrated with.</p>	
Creatio Configuration	
<p>How long have you been using Creatio?</p>	<p>___ Months</p> <p>___ Years</p>

<p>What edition(s) of Creatio do you use?</p>	<p>Sales</p> <p><input type="checkbox"/> Team</p> <p><input type="checkbox"/> Commerce</p> <p><input type="checkbox"/> Enterprise</p> <p>Services</p> <p><input type="checkbox"/> Customer Center</p> <p><input type="checkbox"/> Service Enterprise</p> <p>Other; please specify:</p> <p>___</p>
<p>How many Creatio licenses do you have?</p>	<p>___ Licenses</p>
<p>Creatio Custom Fields Setup</p>	
<p>If you would like our staff to set up your Creatio custom fields and finalize the layouts for you, please provide us a Creatio user ID and password with Setup access to your Creatio account.</p>	<p>User ID: _____</p> <p>Password: _____</p>

<p>Customer/Account Data</p>	
<p>How many customers and jobs do you have in Sage Intacct, in total?</p> <p>(In Sage Intacct, open the window that displays this information.)</p>	<p>Total Accounts: _____</p> <p>Total Names: _____</p> <p>Total Customers: _____</p>
<p>Do you use Parent and Child Accounts in Creatio?</p> <p>If yes, do you want to mimic this hierarchy in Sage Intacct?</p>	<p><input type="checkbox"/> Yes</p> <p><input type="checkbox"/> No</p> <p>Comments:</p>
<p>How many accounts do you have in Creatio?</p>	<p>___ Accounts</p>
<p>Are your account names in Creatio unique?</p>	<p><input type="checkbox"/> Yes</p> <p><input type="checkbox"/> No</p>

Product/Product Data

If you have the same product in Creatio and Product in Sage Intacct, how do you prefer to match?

___ Yes

___ No

Creatio Product Name – Sage Intacct Product Name?

Comments:

Creatio Product Code – Sage Intacct Product Code (custom field)?

InterWeave AR/AP Track Selection

We pre-configure **InterWeave** Models to support base Accounts Receivable and Accounts Payable functionality in your Creatio. Please Review and select which Track you would like us to pre-configure for you.

Check Box below

Track 1

- Account and Opportunity created in Creatio
- Opportunity Closed with triggers:
 - Customer Created in Sage Intacct
 - Invoice Created in Sage Intacct
- Payment received in Sage Intacct and sent to Creatio (applied to Opportunity)
- Refund created in Sage Intacct and sent to Creatio (applied to Opportunity)

Track 2

- Account and Opportunity created in Creatio
- Opportunity Closed with triggers:
 - Customer Created in Sage Intacct
 - SO Created in Sage Intacct.
- Opportunity set to Invoiced stage which triggers SO converted to Invoice in Sage Intacct.
- Payment received in Sage Intacct and sent to Creatio (applied to Opportunity)
- Refund created in Sage Intacct and sent to Creatio (applied to Opportunity)

Track 3

- Account and Opportunity created in Creatio
- Opportunity Closed which triggers:
 - Customer Created in Sage Intacct
 - SO Created in Sage Intacct.
- SO is converted to Invoice in Sage Intacct and corresponding Opportunity updated in Creatio
- Payment received in Sage Intacct and sent to Creatio (applied to Opportunity)

Refund created in Sage Intacct and sent to Creatio (applied to Opportunity)

Track 4

- Account and Opportunity created in Creatio
- Opportunity Closed which triggers:
 - Customer Created in Sage Intacct
 - SO Created in Sage Intacct.
- SO is converted to one or multiple Invoices in Sage Intacct and corresponding Quotes (can be renamed to Invoices) are created in Sage Intacct linked to proper Opportunity
- Payment received in Sage Intacct and sent to Creatio (applied to Quote)
- Refund created in Sage Intacct and sent to Creatio (applied to Quote)

Track 5

- None of the above. Please see our Custom Process below

<p>Based on my selections above, I have included the following copies in pdf form and screen shots of the Template (example below).</p>	<input type="checkbox"/> Invoice <input type="checkbox"/> Sales Order <input type="checkbox"/> Sales Receipt <input type="checkbox"/> Estimate <input type="checkbox"/> Purchase Order
<p>Which Sage Intacct Product types are you planning to integrate?</p>	<input type="checkbox"/> Groups <input type="checkbox"/> Service <input type="checkbox"/> Inventory part/Stock part <input type="checkbox"/> Inventory assembly/Stock Assembly <input type="checkbox"/> Non-inventory part/Non-stock part <input type="checkbox"/> Other charge <input type="checkbox"/> Subtotal (not synched to Creatio) <input type="checkbox"/> Discount <input type="checkbox"/> Other:
<p>When you create new products, which system is considered the Master of Record?</p>	<input type="checkbox"/> Sage Intacct <input type="checkbox"/> Creatio We would like it to be for simplicity's sake.

Transaction/Opportunity Data	
<p>Do you work in a single currency? If you have more than one currency, what currencies do you use in Sage Intacct and/or Creatio?</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No Comment:
Initial Setup	
<p>Do you need an initial data Bulk Load into Creatio or Sage Intacct?</p> <ul style="list-style-type: none"> • Current year Data Load is included in the annual subscription. 	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p>If data is already resident, do you need an initial data binding between Creatio and Sage Intacct?</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
Data Bulk Load Request	

<p>Please specify the following: Accounts/Customers</p> <ol style="list-style-type: none"> 1. What type of data history you want to load (Sage Intacct Object Name – Creatio Object Name) 2. History for what period of date/time you want to load. 3. Which direction you want to load (Sage Intacct to Creatio or Creatio to Sage Intacct) 	<p>Object Name(s): Date/Time Period: Load Direction: <input type="checkbox"/> Sage Intacct to Creatio <input type="checkbox"/> Creatio to Sage Intacct</p>
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<p>Please specify the following: Opportunities or Quotes/Invoices</p> <ol style="list-style-type: none"> 4. What type of data history you want to load (Sage Intacct Object Name – Creatio Object Name) 5. History for what period of date/time you want to load. 6. Which direction you want to load (Sage Intacct to Creatio or Creatio to Sage Intacct) 	<p>Object Name(s): Date/Time Period: Load Direction: <input type="checkbox"/> Sage Intacct to Creatio <input type="checkbox"/> Creatio to Sage Intacct</p>
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<p>Please specify the following: Products/Products</p> <ol style="list-style-type: none"> 7. What type of data history you want to load (Sage Intacct Object Name – Creatio Object Name) 8. History for what period of date/time you want to load. 9. Which direction you want to load (Sage Intacct to Creatio or Creatio to Sage Intacct) 	<p>Object Name(s): Date/Time Period: Load Direction: <input type="checkbox"/> Sage Intacct to Creatio <input type="checkbox"/> Creatio to Sage Intacct</p>
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Sage Intacct Customers to Creatio Accounts Binding Request

<p>Have your Creatio Account Records in your Creatio been bound to your Customer Records in Sage Intacct?</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p>Have you matched your Creatio Account Name in your Creatio to your Customer Name in your Sage Intacct?</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p>Is the Account Name in your Creatio to your Customer Name in your Sage Intacct and exact match?</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>

InterWeave Service Support

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

Support consists of three access points:

1. The **InterWeave** Forum

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

2. **InterWeave** Help & Training Manuals

- a. For Creatio Customers - a comprehensive manual regarding your **InterWeave** Solutions
 - i. (Coming Online 2023 – TBD)

3. **InterWeave** Direct

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