

SugarCRM to QuickBooks Integration

InterWeave **Smart** Solutions

Configure your InterWeave Integration Solution that integrates all SugarCRM objects (Accounts, Contacts, Quotes, Products, Cases, etc.) to all QuickBooks objects (Customers, Jobs, Sales Orders, Sales Receipts, Invoices, Estimates, Items, etc.) with your business process and work flow – all with Configuration. Sophisticated Customizations? Custom Process? Custom Objects? Custom Fields? Call Us - We do this every day.



Introducing **InterWeave Smart** Solutions

Running multiple applications that have specific integration needs, but minimal IT support is a daily reality for all size business owners today. We have the Solution for you - **InterWeave Smart** Solutions.

InterWeave Smart Solutions are Different

- Complete, pre-built integration Solutions - between "Best of Breed" applications
 - Now with New, Advanced Accounts Payable & General Accounting Features!
- 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 pick lists, drop downs or custom fields.
- Start-ups, SMB or Enterprise - select exactly the right type of configuration model 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.

For the SugarCRM_QuickBooks **Smart** Solution, here's a quick summary:

- You may integrate any object and any field from SugarCRM to any object and field in QuickBooks.
- This is a bi-directional Solution. All adds/changes in SugarCRM and QuickBooks are reflected in the converse application - but only if you want them to.
- We have no constraints in how you set up your business flows and processes. If you want SugarCRM Quotes to create QuickBooks Invoices and Sales Orders, Invoices and Sales Receipts - you can. You select what combination you want - or don't want.
- This is configuration management - not programming. You log into the Solutions Portal, register, select your combination of objects and flows - and generate your Solution - it's then ready to test. If you want a different combination of objects and flows - simply sign back in and re-configure your Solution.
- This is not a point to point Solutions - it's hub and spoke. All those other databases, POS Solutions, ERP, eCommerce, bill applications, order management - you can now integrate with - in days.
- Your Solution front-end is logically discounted from the back-end. If you out grow QuickBooks, we simply connect you next financial application; ex. Sage (MAS line) included, MS Dynamics, Peachtree, etc.

Take a look at the Presentations on the Resources/Videos-podcasts on our home page (<http://www.interweave.biz/resources/videos-podcasts>). The Presentations will bring you through Customer Registration, Solution Configuration and running the Scheduled Flows.

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This process usually takes 30 minutes to 1 hour and you will be accompanied by a Solutions Adviser, who will assist you in making your configuration selections.

New Features:

We are adding new features/functions every week, i.e. - Multiple Price Books, Multiple Companies, Discounts, etc. - have already been added. Automated monthly billing and simplified commissions are now available.

We listed three new, integrated features lately; The Error Management Systems (EMS), Log Viewer and the Connection Monitoring System (CMS).

- **Error Management** - works with your scheduled transaction flows. For example, you set Quotes to come from SugarCRM to QuickBooks every 10 minutes. EMS will be reading in the number of records and financial total, and reading out the number of records and financial total. If there is a delta, we will email or IM you immediately letting you know this batch is not in synch.
- **Log Viewer** - works in conjunction with Error Management and allows you to see the transactions in question and make your corrections at the batch (most frequent schedule) level. Just mouse over the run indicator - and there is your log.
- **Connection Management** - actively monitors your connection. If there is a disruption or outage, we fail over your connection for 2 and 1/2 minutes and try to re-connect. If we cannot re-connect, we notify you immediately to restart.

Questions for you:

- Do you have Professional, Enterprise or Ultimate?
- How many SugarCRM Licenses do you have?
- Is QuickBooks on premise, hosted or QuickBooks Online?
- Is your QuickBooks Company file running on a MS 2008 Server or a Standalone Desktop?
- Would you be interested in hosting your QuickBooks with our ISP hosting provider?
- Do you have a Static IP address?
- What is your weekly volume of Invoices and/or Sales Orders?
- Do you have Custom Objects that will be involved in the integration with QuickBooks?

Smart Service Offerings:

The QuickStart Program

Ask us about our new "QuickStart" Program addressing implementation or re-implementation of SugarCRM, QuickBooks, eCommerce, Payment Gateways, etc. We've

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taken the guess work out of set-up, administration and integration. Depending on your requirements, we will recommend the right Consulting Partner.

Smart Support Services

Our support services include different plans so you can select the level of service that's right for you company. All our plans are designed to accelerate user adoption, increase productivity and maximize your InterWeave ROI.

SMART Standard Plan

Every **InterWeave** customer gets **SMART** Standard Success Plan for online support and training. Our **SMART** Standard Plan, included with each license, provides:

- Access to our "Getting Started" online course catalog
- Online assistance through knowledge articles and community resources
- Online Case submission
- Standard 2-business-day response

SMART Standard is for companies that need standard guidance in getting started with InterWeave.

SMART⁺ Plan

If you need a faster response, 24x7 support coverage, and a comprehensive training Solution, we recommend our **SMART Plus** Support Plans.

Click here to obtain a Solution Brochure for the [SMART Support Program](#)

Please let us know is a short GotoMeeting or integration demonstration would assist you in your decision. Please feel free to contact us at sales@interweave.biz or call 800-671-8692 x 1.

We look forward to working with you.

Best Regards,

Bruce

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InterWeave Channel:

http://www.youtube.com/user/bmagowninterweave#p/a/u/0/S7crX_OEEpc

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