Complete Integration Solutions

InterWeave **Smart** Solutions
OROCRM_QUICKBOOKS — INTEGRATION TIMELINES

Managing Integration Timelines

How fast may I expect the integration to be completed?

The integration timeline is at the customers speed — it is directly regulated by:

- the quality and amount of your data,
- duplicates, special characters, loading historical data, etc., and
- the number of flows you have selected. As we have over 75 flows and 150 configurable options to choose from, we recommend a phased approach so you may manage expectations.

Phase 1. Data de-dup in OROCRM is Job 1. OROCRM allows multiple Account names (not unique). QuickBooks Customers are always unique—so you need to run your reports or exports, compare and match them to QuickBooks. Clean data allows for a very clean integration. Look on the AppExchange—Ringlead.

Phase 2. Connect your QuickBooks. We have worked with many Managed Service Provider's who host customers QuickBooks and customers who have the QuickBooks Company file running on their own internal server (ex. MS 2008 or 2012 Server). We work with a QuickBooks hosting company—www.trapponline.com— whose price points are excellent and they know the applications (OROCRM/InterWeave/QuickBooks) very well. We highly recommend them to you.

Phase 3. OROCRM encrypted fields and API limits. If you have selected the **Inter**Weave Credit Card Payment Gateway, contact your OROCRM Representative and ask to have encrypted fields turned on. Secondly, if you will be loading history into OROCRM or bulk loading OROCRM from QuickBooks, contact your OROCRM Representative and ask to extend you daily API calls to 50,000 per day for 7 days. This should allow time to load your OROCRM.

Phase 4. Group your flows in a logical/process manor (OROCRM/QuickBooks/OROCRM). When building out your configuration, there are logical groupings that allow you to test quickly are:

Basic Integration. Accounts to Customers, Opportunities to Invoices and Products to Items.

Advanced Integration 1. Additional flows (Opportunities to Sales Orders, Receipts, Estimates, etc.).

Advanced Integration 2. Account to Vendors, Opportunities to Purchase Orders.

Additional files. Add and integrate multiple QuickBooks Company files.

This approach allows you to set expectations internally and gives all a working plan to measure by.

Phase 5. Bind and move to Production. If you have selected bi-directional integration, we bind Accounts, Opportunities and Products in OROCRM to Customers, Invoices and Items in QuickBooks. Then we move you to production. You set the timing of the flows and your Solution runs 24/7/365.

Phase 6. Monitor and Customize. Now that your in production, to add custom fields in OROCRM connecting to QuickBooks, log in, stop your flows and then select Edit Company File to connect custom fields in OROCRM that you have created to fields in QuickBooks.

Support is available for all customers via email, phone, Skype and GTM. If you having an issue, we have a full library available at the InterWeave Forum—https://integrationtechnologiesinc.desk.com/ - register and review at your leisure.

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Integration Solutions made Easy

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Below is a typical Integration Timeline for a OROCRM_QuickBooks implementation. Yours will vary depending on the number of flows you have selected in your Solution.

Task	Duration	Start	Finish	Pred	Resource
⊟ OROCRM_QuickBooks Master Project Plan for Climatech	23 days	Thu 12/1/16	Mon 1/2/17		
⊟ OROCRM Data	2 days	Thu 12/1/16	Fri 12/2/16		
Data Cleansing	2 days	Thu 12/1/16	Fri 12/2/16		Customer Business Analyst 1
⊟ OROCRM - QB Connector Installation	2 days	Mon 12/5/16	Tue 12/6/16		
Installation of QODBC Enterprised connection on MS server or TrappOnline setup	2 days	Mon 12/5/16	Tue 12/6/16	3	Customer Technologist
⊟ OROCRM - NetWork Trouble Shoot	1 day	Wed 12/7/16	Wed 12/7/16		
All popups, etc, need to be turned off	0.5 days	Wed 12/7/16	Wed 12/7/16	5	Customer Technologist
Static IP required	0.5 days	Wed 12/7/16	Wed 12/7/16	7	Customer Technologist
⊟ OROCRM SF_QuickBooks Basic Integration	10 days	Thu 12/1/16	Wed 12/14/16		
⊟ OROCRM_QuickBooks Standard	10 days	Thu 12/1/16	Wed 12/14/16		
⊟ Configuration & Unit Test	6 days	Thu 12/1/16	Thu 12/8/16		
Setup Custom Sections and Fields	1 day	Thu 12/1/16	Thu 12/1/16		SF InterWeave Developer 1
Configure Standard Solution	2 days	Fri 12/2/16	Mon 12/5/16	12	SF InterWeave Developer 1
Test Standard Utility Flows	3 days	Tue 12/6/16	Thu 12/8/16	13	SF InterWeave Developer 1
⊟ Assemble, Load & Deploy	4 days	Fri 12/9/16	Wed 12/14/16		
⊟ User Acceptance Testing	4 days	Fri 12/9/16	Wed 12/14/16		
Test Advanced Utiliy Flows	1 day	Fri 12/9/16	Fri 12/9/16	14	
Test Advanced Scheduled Flows	3 days	Mon 12/12/16	Wed 12/14/16	17	Customer Business Analyst 1
⊟ OROCRM SF_QuickBooks Advanced Integration	17 days	Fri 12/9/16	Mon 1/2/17		
⊟ OROCRM_QuickBooks Advanced	13 days	Fri 12/9/16	Tue 12/27/16		
⊟ Configuration & Unit Test	9 days	Fri 12/9/16	Wed 12/21/16		
Build Advanced Custom Flows	4 days	Fri 12/9/16	Wed 12/14/16	14	SF InterWeave Developer 1
Configure Advanced Flow(s)	2 days	Thu 12/15/16	Fri 12/16/16	22	SF InterWeave Developer 1
Test Advanced Utility Flows	3 days	Mon 12/19/16	Wed 12/21/16	23	SF InterWeave Developer 1
⊟ Assemble, Load & Deploy	4 days	Thu 12/22/16	Tue 12/27/16		
⊟ User Acceptance Testing	4 days	Thu 12/22/16	Tue 12/27/16		
Test Advanced Utiliy Flows	2 days	Thu 12/22/16	Fri 12/23/16	24	Customer Business Analyst 1
Test Advaced Scheduled Flows	2 days	Mon 12/26/16	Tue 12/27/16	27	Customer Business Analyst 1
⊟ OROCRM SF_QuickBooks Production	4 days	Wed 12/28/16	Mon 1/2/17		
Review and approve configuration	1 day	Wed 12/28/16	Wed 12/28/16	28	Customer Business Analyst 1
Run binding on QuickBooks Production database	2 days	Thu 12/29/16	Fri 12/30/16	30	Customer Business Analyst 1
Start Production Flows	1 day	Mon 1/2/17	Mon 1/2/17	31	Customer Business Analyst 1

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OROCRM_QUICKBOOKS — THE FINE PRINT

Integration Solutions made Easy

The Hidden Fine Print

Here's the Fine Print

- The **majority of QuickBooks to OROCRM Integrations on the market do NOT integrate any objects beyond OROCRM Accounts/Contacts and QuickBooks Customers**, thus, severely limiting your ROI on the integration expense. Even if you do find an integration that supports the integration of QB Transactions and Items with OROCRM Opportunity and Product, you have to be using a flavor of OROCRM that supports these OROCRM objects. OROCRM requires the Professional Edition with Product option turned on to support QuickBooks integration with Item (line items).

- The issues with QuickBooks side of the connectivity to 3rd party integrations is much more complicated, and can require substantially more work than the OROCRM side of the integration. This is due to the fact that QuickBooks instances are predominantly hosted on internal servers, on internal networks, and sometimes, not on server machines at all, but on user machines, most often those of the CEO, CFO, or primary accountant. **All cloud-based, SaaS QuickBooks to OROCRM integrations will require external connectivity to your QuickBooks instance**, and virtually all of them require the instance to be running on a server-class machine, using a server-grade version of Microsoft Windows, which is normally multiple thousands of dollars in annual licensing fees. The reason for the server is that the integration will interact with QuickBooks just like a regular administrative user would, so your host machine needs to be capable of handing multiple user access. We have established a relationship with TrappOnline, a Managed Services Provider who host customers QuickBooks at a very reasonable price point.

- Additionally, many integrations utilize some form of ODBC for external connectivity, and the drivers that support ODBC for QuickBooks are limited, and need to be installed as third-party applications. As these **drivers have unrestricted access to a variety of data in the QuickBooks database**, this exposes all kinds of security issues and concerns. Most drivers can lock out access to social security numbers and credit card data if configured properly. Most ODBC connectors require the use of a dedicated QuickBooks admin user. This can be expensive, especially if you are using a QuickBooks version that requires licenses to be purchased in groups of five, and you already have an even multiple of five users before adding the dedicated integration user.

- There are known **memory-leak issues in QuickBooks**, especially when the software is utilized heavily and external ODBC accesses are being made frequently. The QuickBooks executable can eat up hundreds of megabytes of memory within a few days and can grow to gigabytes in several days. This will cause enormous slow-downs for users and the integration services. Often time's monitors need to be put in place that will automatically restart the QuickBooks application in a non-destructive way, once the memory usage has grown beyond a predefined threshold. Such monitors are typically beyond the scope of your usual IT administrators and can require specialized consultants to ensure the process is secure and safe, and does not result in database corruption or locking out users during peak usage times.

- **Versions of QuickBooks** are also important. Most important are that the data connectivity drivers, typically ODBC, are compatible with whatever version of QuickBooks you are running. Most versions of QuickBooks support these drivers, including many International flavors. While QuickBooks Online does support external connectivity, the interface is not very stable, and QuickBooks can and often does change the interface without notice, causing integration issues some of the time. Also, the extent of the functionality supported by the QuickBooks Online connectivity is general limited when compared to the full versions.

- **Internet connectivity speed** is very important, for both the OROCRM and QuickBooks hosting servers and their associated environments. There are many times when the performance of the QuickBooks external interface speed is not adequate for maximum QuickBooks to OROCRM integration. The problems related to inadequate Internet connectivity speeds on the QuickBooks side is normally worse. For these reasons, users of QuickBooks to OROCRM integrations that require a high-level of performance will typically turn to experienced vendors that specialize in QuickBooks hosting. As noted above, our Managed Services Partner for hosting customers QuickBooks is www.trapponline.com. We recommend you contact them.

- **Choosing your QuickBooks Hosting Partner is key —** we recommend TrappOnline.