



InterWeave Smart Solutions

SMART SOLUTION PROCESS

InterWeave Smart Solutions are designed to run to operate in a very efficient and streamlined manner, but a Smart Process will deliver a Smart Solution. **InterWeave** deployment is approached on parallel tracks; **Track 1** is the **InterWeave** Model Selection, Custom Section and Field Setup and then Connector Installation, **Track 2** is Design Review and Analysis, Custom Solution Development followed by Configuration, Deployment and Support. Working both Tracks in parallel allow your Solution deployment to proceed exactly to the agreed project timeline. Below, please see the Steps and Details required to create your **Smart** Solution.

Track 1— Model Selection and Setup

- **InterWeave Model Selection**

InterWeave Smart Solutions deliver a complete integration process for popular business applications. Let's look at a favorite, Salesforce.com and QuickBooks. With **InterWeave Smart** Solutions, you can purchase, configure and run a customized integration Solution for these applications that integrate all standard Salesforce objects (Accounts, Contacts, Opportunities, Products, Cases) to all standard QuickBooks objects (Customers, Contacts, Sales Orders, Sales Receipts, Invoices, Estimates, Jobs, Items); configure, test, run. Our Professional, Premier, Small Business and Enterprise Models provide Solutions are uni or bi-directional at object level and encompass A/R features only or A/R and A/P features in a configurable format.

- **Custom Section and Field Setup**

- Customize/update your CRM and Financial application with custom sections and fields as identified in the Help & Training Manual. We create custom sections and fields to support the integration and custom sections to support financial information which is now available in your CRM.

- **Connector Installation**

- If you are connecting to Quickbooks Online, you will configure access directly in QB Online and a key will be issued.
- If your connecting to your Quickbooks Company file in the TrappOnline hosted environment, Trapp will provide the installation. For more information regarding hosting your QuickBooks, visit the TrappOnline page on our website — <http://www.interweave.biz/trapponline-hosting>
- If your connecting to your Quickbooks Company file in your environment, you will load down our connector to your server and port forward to allow **InterWeave** to talk with the connector.

Track 2— Design and Configuration of Solution

- **Design and Configuration**

- Every standard **InterWeave** Solution is based on Best Practices and fully configurable from Object/Field of your source application to the Object /Field of your target application. But every customer is different and the business process and work flow they have implemented may be proprietary to them. An **InterWeave** Specialist will work with your team to insure we understand not only your process, but provide recommendations regarding best practice and guidelines regarding transaction processing in your target application.

- **Custom Solution Development**

- Once the Design Review and Analysis is signed off by the customer, your custom solution will be developed by **InterWeave** according to an agreed project timeline.

- **Solution Deployment and Testing**

- **InterWeave** Solutions are completely configurable by the customer with pick lists, drop downs, custom objects and custom fields. Your **InterWeave** Specialist will work with you to configure your Solution and generate your Flows in a master dashboard format and test.

- **Customer Testing**

- When you log into your **InterWeave** Solution, your Flows (or source object to target object transactions) are presented to you in two forms; Scheduled Flows (for production) and Utility Flows for testing. Utility Flows are for one to one testing while Scheduled Flows encompass sophisticated processing logic. Once your done testing, turn on your Scheduled Flows.

- **Support**

- Every customer gets our standard **SmartSupport** Plan for online support. Our most successful customers take advantage of our **Smart** Success Plans to achieve an 80% higher return on their **InterWeave** investment.