



InterWeave Smart Solutions

SUGARCRM_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 managed expectations.

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

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 Server). We work with a QuickBooks hosting company—www.traponline.com—whose price points are excellent and they know the applications (SugarCRM/InterWeave/QuickBooks) very well. We highly recommend them to you. You can reach Greg Forshey at 302-443-9145.

Phase 3. Group your flows in a logical/process manor (SugarCRM/QuickBooks/SugarCRM). When building out your configuration, there are logical groupings that allow you to test quickly are:

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

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

Advanced Integration 2. Account to Vendors, Quotes 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 4. Bind and move to Production. We bind Accounts, Quotes and Products in SugarCRM 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 5. Monitor and Customize. Now that your in production, to add custom fields in SugarCRM connecting to QuickBooks, log in, stop your flows and then select Edit Company File to connect custom fields in Sugar that you have created to fields in QuickBooks.

Support is available for all customers via email, phone, Skype and GotoMeeting screensharing. If you having an issue, we have a full library available at the InterWeave Forum—<https://interweavesupport.zendesk.com/forums>—register and review at your leisure.

If you require additional help with setup, testing, configuration, etc., this is available to you. Our **SmartStart** Program addresses all major area of the integration— see detail here—<http://www.interweave.biz/PDFs/InterWeave%20Smart%20Solutions%20SmartStart%20Data%20Sheet.pdf>

There are a variety of **InterWeave Smart** Solutions available; from CRM, Financial, ERP, eCommerce, Billing, Telephony, Customer Service and more. Contact us at 203 274 5226, email sales@interweave.biz or go to www.interweave.biz.

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Getting Started and What to Expect

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

| | | | | | |
|--|------------------|--------------------|--------------------|----|-----------------------------|
| <input type="checkbox"/> SugarCRM Master Project Plan | 22.4 days | Thu 3/1/12 | Mon 4/2/12 | | |
| <input type="checkbox"/> SugarCRM Data | 4 days | Thu 3/1/12 | Tue 3/6/12 | | |
| Data Cleansing | 2 days | Thu 3/1/12 | Fri 3/2/12 | | Customer Business Analyst 1 |
| Data DeDuping | 2 days | Mon 3/5/12 | Tue 3/6/12 | 3 | Customer Business Analyst 1 |
| <input type="checkbox"/> SugarCRM - Ibiz Connector Installation | 2 days | Wed 3/7/12 | Thu 3/8/12 | | |
| Installation of Ibiz connection on MS server or TrappOnline setup | 1 day | Wed 3/7/12 | Wed 3/7/12 | 4 | Customer Technologist |
| <input type="checkbox"/> SugarCRM - NetWork Trouble Shoot | 1 day | Thu 3/8/12 | Thu 3/8/12 | | |
| All popups, etc, need to be turned off | 0.5 days | Thu 3/8/12 | Thu 3/8/12 | 6 | Customer Technologist |
| Static IP required | 0.5 days | Thu 3/8/12 | Thu 3/8/12 | 8 | Customer Technologist |
| <input type="checkbox"/> SugarCRM - QB Test Database (optional) | 0.4 days | Wed 3/7/12 | Wed 3/7/12 | | |
| Create test QB database for Ibiz Connector to access | 0.2 days | Wed 3/7/12 | Wed 3/7/12 | 4 | Customer Business Analyst 1 |
| Address any internal routing to access test QB File | 0.2 days | Wed 3/7/12 | Wed 3/7/12 | 11 | Customer Business Analyst 1 |
| <input type="checkbox"/> SugarCRM SF_QB Basic Integration | 16 days | Wed 3/7/12 | Thu 3/29/12 | | |
| <input type="checkbox"/> SugarCRM_Quickbooks Standard | 9 days | Wed 3/7/12 | Tue 3/20/12 | | |
| <input type="checkbox"/> Configuration & Unit Test | 5 days | Wed 3/7/12 | Wed 3/14/12 | | |
| Configure Standard Solution | 2 days | Wed 3/7/12 | Fri 3/9/12 | 12 | SF InterWeave Developer 1 |
| Test Standard Utility Flows | 3 days | Fri 3/9/12 | Wed 3/14/12 | 16 | SF InterWeave Developer 1 |
| <input type="checkbox"/> Assemble, Load & Deploy | 4 days | Wed 3/14/12 | Tue 3/20/12 | | |
| <input type="checkbox"/> User Acceptance Testing | 4 days | Wed 3/14/12 | Tue 3/20/12 | | |
| Test Standard Utility Flows | 2 days | Wed 3/14/12 | Fri 3/16/12 | 17 | Customer Business Analyst 1 |
| Test Standard Scheduled Flows | 2 days | Fri 3/16/12 | Tue 3/20/12 | 20 | Customer Business Analyst 1 |
| <input type="checkbox"/> SugarCRM SF_QB Advanced Integration | 11 days | Wed 3/14/12 | Thu 3/29/12 | | |
| <input type="checkbox"/> SugarCRM_Quickbooks Advanced | 11 days | Wed 3/14/12 | Thu 3/29/12 | | |
| <input type="checkbox"/> Configuration & Unit Test | 7 days | Wed 3/14/12 | Fri 3/23/12 | | |
| Configure Advanced Flow(s) | 2 days | Wed 3/14/12 | Fri 3/16/12 | 17 | SF InterWeave Developer 1 |
| Custom Development (if required)* | 2 days | Fri 3/16/12 | Tue 3/20/12 | 25 | SF InterWeave Developer 1 |
| Test Advanced Utility Flows | 3 days | Tue 3/20/12 | Fri 3/23/12 | 26 | SF InterWeave Developer 1 |
| <input type="checkbox"/> Assemble, Load & Deploy | 4 days | Fri 3/23/12 | Thu 3/29/12 | | |
| <input type="checkbox"/> User Acceptance Testing | 4 days | Fri 3/23/12 | Thu 3/29/12 | | |
| Test Advanced Utility Flows | 2 days | Fri 3/23/12 | Tue 3/27/12 | 27 | Customer Business Analyst 1 |
| Test Advanced Scheduled Flows | 2 days | Tue 3/27/12 | Thu 3/29/12 | 30 | Customer Business Analyst 1 |
| <input type="checkbox"/> SugarCRM SF_QB Production | 18.4 days | Wed 3/7/12 | Mon 4/2/12 | | |
| Review and approve configuration | 1 day | Thu 3/29/12 | Fri 3/30/12 | 31 | Customer Business Analyst 1 |
| Run binding on QB Production database | 1 day | Fri 3/30/12 | Mon 4/2/12 | 33 | Customer Business Analyst 1 |
| Start Production Flows | 0 days | Mon 4/2/12 | Mon 4/2/12 | 34 | Customer Business Analyst 1 |



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SUGARCRM_QUICKBOOKS — THE FINE PRINT

The Hidden Fine Print

Here's the Fine Print

- The **majority of QuickBooks to SugarCRM Integrations on the market do NOT integrate any objects beyond SugarCRM 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 Sugar Quote and Product Catalog, you have to be using a flavor of SugarCRM that supports these SugarCRM modules/objects. The community version of SugarCRM does NOT support Products or Quotes, and is therefore very limited in effectiveness of a QuickBooks integration.
- The **version of SugarCRM** is also important. The interfaces for SugarCRM 6.x changed from SugarCRM 5.x in such ways as to cause some fairly significant revisions to any integrations that currently work for 5.x and older SugarCRM versions. Many of the QuickBooks to SugarCRM integrations that exist on the market today have NOT been tested against the 6.x versions of SugarCRM, and will likely not work, without significant development efforts of the integration software developers.
- The issues with QuickBooks side of the connectivity to 3rd party integrations is much more complicated, and can require substantially more work than the SugarCRM 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 SugarCRM 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 admin user would, so your host machine needs to be capable of handling multiple user access. We have established a relationship with TrappOnline, a Managed Services Provider who host customers copies of Quickbooks
- 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. Often time's monitors need to be put in place that will automatically restart the QuickBooks Solution.
- **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 desktop versions.
- **Internet connectivity speed** is very important, for both the SugarCRM and QuickBooks hosting servers and their associated environments. There are many times when the performance of the SugarOnDemand external interface speed is not adequate for maximum QuickBooks to SugarCRM integration. The problems related to inadequate Internet connectivity speeds on the QuickBooks side is normally worse. For these reasons, users of QuickBooks to SugarCRM integrations that require a high-level of performance will typically turn to experienced vendors that specialize in SugarCRM, and QuickBooks hosting, and often times, it is advantageous if the hosting company can host the integration software as well. It is difficult to find providers of a full-suite of QuickBooks to SugarCRM integration services to provide for third-party installations of their software.
- **Choosing your QuickBooks Hosting Partner is key** — we recommend TrappOnline.