InterWeave

— PAMPA BAY TRAINING MANUAL

Track 1 – End User Core & Track – 1a + *Accounting Add-On*

Creatio · Authorize.Net · QuickBooks Desktop · InterWeave

Required for Accounting Staff, Customer Service & Sales Operations — Track 1a required for Accounting Staff only

AUDIENCE
Accounting · Service · Sales Ops

EST. DURATION
8 Modules · ~15 Hours

interweave.biz

Pampa Bay Training Manual

Track 1 — End User Core & Track 1a — Accounting Add-On

Creatio + Authorize.Net + QuickBooks Desktop + InterWeave

How to Use This Manual

This manual covers Track 1 (End User Core — required for Accounting Staff, Customer Service, and Sales Operations) and Track 1a (Accounting Add-On — required for Accounting Staff only). Each module includes learning objectives, concept explanations, step-by-step procedures, a hands-on exercise, and a short knowledge check. Complete modules in order — later modules assume you've done the exercises in earlier ones.

Learning Path at a Glance

#	Module	Duration	Track
1	InterWeave Fundamentals	1.5 Hours	T1 — End User Core
2	Business Process Overview	2 Hours	T1 — End User Core
3	Creatio End User Training	4 Hours	T1 — End User Core
4	Payment Processing Basics	2 Hours	T1 — End User Core
5	Daily Operations Orientation	1 Hour	T1 — End User Core
6	Recognizing & Escalating Errors	0.5 Hours	T1 — End User Core
7	Accounting User Training	4 Hours	T1a — Accounting Add-On
8	Daily Financial Reconciliation	2 Hours	T1a — Accounting Add-On

Module 1: InterWeave Fundamentals

Track	Track 1 — End User Core
Duration	1.5 Hours
Audience	Accounting Staff, Customer Service, Sales Operations

Learning Objectives

- Explain in one sentence what InterWeave does for Pampa Bay
- Log in to InterWeave
- Find an answer in the Help Center
- Locate your assigned courses in the InterWeave Academy
- Know who to contact when something looks wrong

What Is InterWeave?

InterWeave is the connection layer that sits between the systems Pampa Bay uses every day: Creatio (where you enter customers, orders, and invoices), QuickBooks Desktop (the accounting system), and Authorize.Net (payment processing). When you create or update a record in Creatio, InterWeave automatically carries that information to QuickBooks and Authorize.Net so nobody has to re-type it.

Think of Creatio as the front door — it's where you do your work. InterWeave is the hallway connecting that front door to the back-office systems. You will do almost all of your day-to-day work in Creatio; InterWeave runs in the background.

> **NOTE — Why this matters**
> Before InterWeave, staff had to enter the same order or payment into multiple systems by hand. That created double work and let the systems drift out of agreement with each other. InterWeave's job is to keep Creatio, QuickBooks, and Authorize.Net saying the same thing.

What You Will and Won't Do

- You will work entirely in Creatio for day-to-day tasks (Modules 2–3).
- You will use Authorize.Net-related screens only for the customer-facing payment actions covered in Module 4.
- You will not configure InterWeave, edit integration settings, or attempt to fix a stuck sync yourself — that is reserved for the System Administrator. Your job is to recognize a problem and escalate it (Module 6).

Getting Help

Two resources cover almost everything you'll need after this training:

- Help Center (help.interweave.biz) — searchable documentation and how-to articles.
- Academy (academy.interweave.biz) — self-paced courses, including your assigned learning path and the certification assessment.

Hands-On Walkthrough

Logging In

1. Go to the InterWeave login page provided in your welcome email.
2. Enter the username and temporary password issued to you, then set a new password when prompted.
3. Confirm you land on your home dashboard. If you cannot log in, contact your System Administrator before continuing.

Finding the Help Center

1. Navigate to help.interweave.biz.
2. Use the search bar to look up a topic — try searching "create an order" as a test.
3. Note the article's title and location; you'll use this same search pattern whenever you have a how-to question.

Finding Your Assigned Courses in the Academy

1. Navigate to academy.interweave.biz and log in.
2. Open "My Learning Path" from your dashboard.
3. Confirm the Track 1 End User courses (and, if you are Accounting Staff, the Track 1a courses) appear on your path.

Knowledge Check

1. In one sentence, what does InterWeave do?

2. If a record looks like it failed to sync, what should you do?

3. Where do you go to search how-to documentation?

Module 2: Business Process Overview

Track	Track 1 — End User Core
Duration	2 Hours
Audience	Accounting Staff, Customer Service, Sales Operations

Learning Objectives

- Describe the Pampa Bay transaction flow from quote to payment
- Define each core business object and where it lives
- Trace a single transaction across all four systems

The Pampa Bay Transaction Flow

Every Pampa Bay transaction moves through the same four stops, in the same order:

Creatio	InterWeave	QuickBooks Desktop	Authorize.Net	Creatio

A transaction starts in Creatio (an order is created), flows through InterWeave to QuickBooks Desktop (an invoice is recorded), a payment is taken through Authorize.Net, and the payment result flows back through InterWeave into Creatio so the order shows as paid. Everything you do lives inside this loop.

Business Objects — What Each One Means

Account	A company or organization Pampa Bay does business with. The top-level record everything else attaches to.
Contact	An individual person associated with an Account — who you actually talk to.
Order	A confirmed request to purchase — created in Creatio, the starting point of the transaction flow.
Product	An item or service that can be added as a line on an Order.
Invoice	The billing document generated from an Order once it's ready to be charged; this is what QuickBooks Desktop receives.
Payment	The record of money actually collected against an Invoice, generated when Authorize.Net processes a charge.
Credit Memo	A record reducing what a customer owes — used for refunds, returns, or billing corrections.

NOTE — Rule of thumb

If you're not sure which system "owns" a piece of information: Creatio owns the customer relationship and the order. QuickBooks owns the accounting record. Authorize.Net owns the payment transaction. InterWeave just keeps the three in sync.

EXERCISE — Walk a Transaction from Quote to Payment

Using the Creatio training environment, trace one closed transaction end-to-end and record what you find.

1. In Creatio, open the Orders list and locate a training-environment Order with a status of "Closed" or "Paid."
2. Open the Order and note the linked Account and Contact.
3. From the Order, open the related Invoice. Record the Invoice number and amount.
4. From the Invoice, open the related Payment record. Record the payment date and amount.
5. Check whether a Credit Memo exists on this transaction. If so, note the amount and reason.
6. Fill in the transaction worksheet: Account name, Order #, Invoice #, Payment amount/date, Credit Memo (if any).

Verify:

- Every field on your worksheet is filled in from a record you actually opened — not guessed.
- The Invoice amount and Payment amount match (or the difference is explained by a Credit Memo).

Knowledge Check

1. Put these in order: Authorize.Net, QuickBooks Desktop, Creatio (start), InterWeave.

2. What turns into an Invoice?

3. Which system "owns" the payment transaction record?

Module 3: Creatio End User Training

Track	Track 1 — End User Core
Duration	4 Hours
Audience	Accounting Staff, Customer Service, Sales Operations

Learning Objectives

- Create and update Customer, Order, and Invoice records correctly
- Tell the difference between a Status Field and an Integration Field
- Attach documents to a record
- Search and filter effectively
- Identify fields you must never edit

3.1 Working with Customer Records

Customer information lives on the Account and Contact records. Before creating a new Account, search first — duplicate Accounts are one of the most common causes of sync problems downstream.

Creating a Customer

1. From the main menu, open Accounts and search for the company name.
2. If none exists, select New, complete the required fields (Company Name, primary Contact, billing address).
3. Save the record and confirm it appears in the Accounts list.
4. Add a Contact to the Account if one doesn't already exist.

3.2 Working with Orders

Creating an Order

1. Open the Order section and select New.
2. Link the Order to the correct Account and Contact.
3. Add Products as line items from the product catalog — do not create new Products; that is an Administrator task.
4. Set the Order stage as instructed by your supervisor's process (e.g., New → In Progress → Fulfilled).
5. Save the Order.

3.3 Working with Products

You will select existing Products onto Orders. Creating, pricing, or retiring a Product is an administrator-level change because it affects every future Order and the QuickBooks item list — flag any request for a new or changed product to your Administrator.

3.4 Working with Invoices

Invoices are generated from an Order once it's ready to bill. You can review an Invoice's line items and totals; you should not manually change Invoice totals after it has been generated. If a total looks wrong, correct it on the Order (if not yet synced) or escalate (if it has already synced to QuickBooks).

3.5 Status Fields vs. Integration Fields

This is the single most important distinction in this module.

Status Field	A business-process field you are expected to update as work progresses — e.g., Order Stage (New, In Progress, Fulfilled) or Invoice Status (Draft, Sent, Paid).
Integration Field	A system field showing InterWeave's sync state — e.g., Sync Status, Last Synced timestamp, External ID. These are read-only reference information for you. Never edit them.

CAUTION — What NOT to edit

Never manually change: Sync Status, External ID / Integration ID fields, Last Synced timestamps, or any field labeled "Do not edit" or shown greyed out. Editing these does not fix a sync problem — it can make the problem harder for the Administrator to diagnose. If a Sync Status shows "Processing" for an unusually long time or shows "Error," follow the escalation process in Module 6.

3.6 Payment Objects

Payment records attached to an Invoice are generated automatically once Authorize.Net processes a charge (Module 4). As an end user you will view these to confirm a payment posted — you will not create Payment records by hand.

3.7 Attachments

Attaching a Document to a Record

1. Open the record (Account, Order, or Invoice) you want to attach a file to.
2. Open the Attachments/Files tab.
3. Select Add File, choose the document from your computer, and confirm the upload.

3.8 Searching & Filtering

- Use the global search bar for a quick lookup by name, order number, or invoice number.
- Use column filters within a list (e.g., Orders) to narrow by status, date range, or owner.
- Save a frequently used filter as a view so you don't have to rebuild it each time.

3.9 Updating Records Safely

As a general rule: fields you were asked to fill in when creating the record (names, addresses, quantities, stages) are safe to update. Fields that appear automatically once a record is saved, or that reference another system, are not yours to edit — see 3.5 above.

EXERCISE — Create Customer, Order, and Invoice; Verify Synchronization

In the Creatio training environment, create a complete transaction and confirm it synced correctly.

1. Search for a training-environment company name to confirm no duplicate exists, then create a new Account and Contact.
2. Create a new Order linked to that Account, add at least two Products as line items, and set the Order stage to "Fulfilled."
3. Save the Order and open the generated Invoice; confirm the line items and total match the Order.
4. Attach a sample document (e.g., a training PO file) to the Order.
5. Wait for the sync interval to pass, then refresh the record and check the Sync Status field.

Verify:

- The Account does not duplicate an existing company.
- The Invoice total matches the sum of the Order line items.

- Sync Status reads "Synced" (not "Processing" or "Error") before you consider the exercise complete.

Knowledge Check

1. What's the difference between a Status Field and an Integration Field?

2. You need a new Product added to the catalog. What do you do?

3. An Invoice total looks wrong on a record that hasn't synced yet. What's the correct fix?

Module 4: Payment Processing Basics

Track	Track 1 — End User Core
Duration	2 Hours
Audience	Accounting Staff, Customer Service, Sales Operations

Learning Objectives

- Explain Authorize.Net's role in the transaction flow
- Send a Payment Link from an Invoice
- Take a credit card payment
- Issue a refund following the approval process
- Read a Transaction Status correctly

What Is Authorize.Net?

Authorize.Net is the payment processor Pampa Bay uses to collect customer payments. It sits at the Invoice → Payment step of the transaction flow: once an Invoice exists in the loop, Authorize.Net is where the actual charge happens, and the result flows back into Creatio automatically.

Sending a Payment Link

Generate and Send a Payment Link

1. Open the Invoice you want the customer to pay.
2. Select Generate Payment Link.
3. Send the link to the customer via the method your team normally uses (email is most common).
4. The Invoice's Transaction Status will update automatically once the customer pays — you do not need to manually mark it paid.

Taking a Credit Card Payment

Manual Card Entry

1. Open the Invoice and select Take Payment.
2. Enter the card details provided by the customer (in person or by phone — never store card numbers outside this screen).
3. Submit and confirm the Transaction Status shows "Succeeded."

> **CAUTION — Card data handling**
> Never write down, email, text, or save a customer's card number anywhere outside this payment screen. Enter it directly and nowhere else.

Refunds

Refunds reverse money already collected, so they carry more risk than a normal payment action.

> **CAUTION — Approval required**
> Confirm your manager's current refund-approval threshold before issuing a refund. Do not issue a refund based solely on a customer's verbal request without following that process.

Issuing a Refund

1. Open the Payment record tied to the Invoice.
2. Select Refund and enter the amount (full or partial).
3. Confirm the refund — a Credit Memo is generated automatically in Creatio.
4. Verify the Transaction Status updates to "Refunded" and the Credit Memo reflects the correct amount.

Reading Transaction Status

Pending	Payment initiated but not yet confirmed. Normal for a few minutes; escalate if it stays Pending unusually long.
Succeeded	Payment collected successfully.
Failed	The charge did not go through (declined card, expired card, etc.). Ask the customer to retry with a different card or method.
Refunded	Money has been returned to the customer.

EXERCISE — Process a Payment and a Refund

Using the Authorize.Net training environment, process a full transaction and then reverse it.

1. Open a training Invoice and generate a Payment Link, or use Take Payment with a test card number provided by your instructor.
2. Confirm the Transaction Status shows "Succeeded."
3. Return to Creatio and confirm the Payment record appears on the Invoice with the correct amount.
4. Issue a partial refund on that same Payment.
5. Confirm the Transaction Status updates to "Refunded" and a Credit Memo appears in Creatio.

Verify:

- The Payment amount in Creatio exactly matches what was charged in Authorize.Net.
- The Credit Memo amount exactly matches the refund amount.

Knowledge Check

1. A customer's card is declined. What Transaction Status will you see, and what should you do?

2. Where should you ever write down a customer's card number?

3. What gets created automatically in Creatio when you issue a refund?

Module 5: Daily Operations Orientation

Track	Track 1 — End User Core
Duration	1 Hour
Audience	Accounting Staff, Customer Service, Sales Operations

Learning Objectives

- Explain what a "Flow" is in plain language
- Find the sync status for a specific record
- Read a flow log entry for a single transaction

What's a Flow?

A Flow is InterWeave's term for one automated hand-off of information between systems — for example, the Flow that carries a new Order from Creatio into QuickBooks Desktop as an Invoice. You don't manage Flows (that's an Administrator responsibility, covered in the Administrator track); you only ever need to check the status of a Flow as it relates to one specific record you're working on.

Checking Sync Status on a Record

Viewing Record-Level Sync Status

1. Open the Order, Invoice, or Payment record you want to check.
2. Locate the Sync Status field (see Module 3.5 — this is an Integration Field, view-only).
3. If you need more detail, open the record's activity/log tab to see the timestamp of the last successful sync.

This is the only Flow-related screen you need for day-to-day work. A full console showing every Flow running across the whole system exists, but it is an Administrator tool.

EXERCISE — Locate and Read the Log for a Completed Transaction

Use the transaction you worked with in Module 2 or 3.

1. Open the Order or Invoice record.
2. Find its Sync Status and Last Synced timestamp.
3. Open the record's log/activity tab and identify the entry showing the successful sync.
4. Note what a normal, successful log entry looks like so you can recognize an abnormal one later.

Verify:

- You can point to the specific field and timestamp that tell you a record synced successfully.

Knowledge Check

1. What is a Flow, in your own words?

2. Where do you check sync status for a record you're working on?

Module 6: Recognizing & Escalating Errors

Track	Track 1 — End User Core
Duration	0.5 Hours
Audience	Accounting Staff, Customer Service, Sales Operations

Learning Objectives

- Recognize what an error looks like in Creatio
- Decide when to escalate versus wait
- Escalate with the right information the first time

What an Error Looks Like

Most records sync within a normal time window (your Administrator will confirm the current expected interval). An error is visible on the record itself — you do not need any admin access to spot one.

Normal	Sync Status shows "Synced" with a recent Last Synced timestamp.
Monitor	Sync Status shows "Processing" and is still within the normal time window.
Escalate	Sync Status shows "Error," or "Processing" has continued well beyond the normal window, or a customer reports a payment/invoice discrepancy you can't explain from the record.

How to Escalate

Do not attempt to re-save the record repeatedly, delete it, or change Integration Fields to try to "force" a fix — none of these resolve a sync error and some make diagnosis harder.

Submitting an Escalation

1. Open a ticket at the Help Center (or your team's designated channel, per your Administrator's instructions).
2. Include: the record type and ID/number, the exact error text or status shown, and the time you first noticed it.
3. Include a screenshot of the record showing the error state.
4. Submit and note the ticket number in case you need to follow up.

EXERCISE — Escalation Scenarios

For each scenario, decide: Normal, Monitor, or Escalate — and if Escalate, list exactly what you'd include in the ticket.

1. Scenario A: An Order synced 90 seconds ago and shows "Synced."
2. Scenario B: An Invoice has shown "Processing" for well beyond the normal window your Administrator described.
3. Scenario C: A Payment record shows "Error" and the customer says they were charged twice.

Verify:

- Scenario A = Normal. Scenario B = Monitor, then Escalate if it persists. Scenario C = Escalate immediately, including the double-charge detail from the customer.

Knowledge Check

1. You see Sync Status "Error" on an Invoice. What's your first move?

2. Name two things you should never do when you spot a sync error.

Module 7: Accounting User Training

Track	Track 1a — Accounting Add-On
Duration	4 Hours
Audience	Accounting Staff only

Learning Objectives

- Explain how records arrive in QuickBooks Desktop from Creatio
- Verify Customers, Invoices, Payments, and Credit Memos against Creatio
- Understand the General Ledger impact of each object
- Understand why Single User Mode matters for sync

QuickBooks Desktop's Role

QuickBooks Desktop is the accounting system of record. It receives what Creatio/InterWeave sends — you are generally reviewing and reconciling here, not originating new customer or order data. If something needs to change on the customer or order side, it should be changed in Creatio so it flows down correctly, not edited independently in QuickBooks, which can cause the two systems to disagree.

7.1 Customers & Items

Customer and Item (Product) records mirror what's in Creatio. Reviewing them here is fine; editing the source data (name, address, pricing) belongs in Creatio so InterWeave can re-sync the correction.

7.2 Invoices

Verifying an Invoice

1. Open the Invoice in QuickBooks Desktop.
2. Compare the customer, line items, and total against the corresponding Order/Invoice in Creatio.
3. If they match, no action needed. If they don't match, do not edit the QuickBooks Invoice directly — escalate per Module 6 so the Administrator can investigate the sync.

7.3 Payments & Receiving Payments

When Authorize.Net processes a payment, InterWeave posts it into QuickBooks as a Receive Payment transaction applied to the matching Invoice. Your job is to confirm the payment applied to the correct Invoice and for the correct amount — not to manually receive payments that already came through Authorize.Net.

7.4 Credit Memos

Refunds issued in Creatio/Authorize.Net (Module 4) generate a matching Credit Memo in QuickBooks. Verify the amount and that it's applied against the correct Invoice.

7.5 Inventory

If the Product is inventory-tracked, an Order reduces the on-hand quantity once it syncs. Spot-check inventory counts against recent Orders as part of your review — flag persistent mismatches to the Administrator rather than manually adjusting counts.

7.6 Sales Tax

Sales tax is calculated on the Order in Creatio and carried through to the Invoice. Spot-check that the tax rate applied matches the customer's jurisdiction; a wrong rate is a Creatio-side data issue (customer address/tax code), not something to hand-correct in QuickBooks.

7.7 General Ledger Impact

For your day-to-day review, know which accounts each object touches: an Invoice increases Accounts Receivable and Revenue; a Payment decreases Accounts Receivable and increases the deposit/bank account (via Authorize.Net settlement); a Credit Memo decreases Accounts Receivable and Revenue. You don't need to post journal entries for normal flow transactions — InterWeave handles that. This matters when you're reconciling (Module 8) and need to explain why a balance moved.

7.8 Single User Mode

CAUTION — Why this matters

InterWeave needs an open connection to QuickBooks Desktop to sync. If QuickBooks is left in Single User Mode by someone else and you need to work in it too, or if it's exclusively locked, sync can be delayed or blocked. If you notice syncing has stalled and QuickBooks was recently in Single User Mode, mention that detail when you escalate — it helps the Administrator diagnose it faster.

EXERCISE — Review Records Synchronized from Creatio

Using the transaction you created in Module 3's exercise, verify it landed correctly in QuickBooks Desktop.

1. Locate the Customer, Invoice, and Payment in QuickBooks that correspond to your Module 3 exercise transaction.
2. Compare each against the Creatio source record: customer name/address, line items, total, payment amount.
3. Confirm any Credit Memo (if you completed the Module 4 refund exercise) applied correctly.
4. Note the accounts affected (Accounts Receivable, Revenue, deposit account) for this transaction.

Verify:

- Every value in QuickBooks matches its Creatio source exactly. Any mismatch is documented and escalated, not hand-corrected.

Knowledge Check

1. You find an Invoice total in QuickBooks that doesn't match Creatio. What do you do?

2. Where should a customer's address be corrected — Creatio or QuickBooks?

3. Why can Single User Mode cause a sync delay?

Module 8: Daily Financial Reconciliation

Track	Track 1a — Accounting Add-On
Duration	2 Hours
Audience	Accounting Staff only

Learning Objectives

- Complete the end-of-day reconciliation checklist
- Pull and compare reports from Creatio, QuickBooks, and Authorize.Net
- Identify and document exceptions
- Know what to do — and not do — with an exception

Why Reconcile Daily

Daily reconciliation catches a sync problem within 24 hours instead of letting it compound over a week or a month, when it becomes much harder to trace back to the original transaction.

End-of-Day Checklist

- Pull the day's Creatio Order/Invoice report.
- Pull the day's QuickBooks Invoice and Payment report.
- Pull the day's Authorize.Net Settlement report.
- Match transactions across all three.
- Log any exceptions on the Exception Report.
- Sign off in the Audit Trail.

Pulling Each Report

- Creatio Report — filter the Orders/Invoices list by today's date; export or note each Order #, Invoice #, and amount.
- QuickBooks Report — run the day's Invoice and Received Payments report for the same date range.
- Authorize.Net Settlement — pull today's settlement/payout report showing what actually funded to the bank.

Matching Transactions

Match by Order/Invoice number (or External ID) first, then confirm amount and date agree across all three reports. A transaction that appears in Creatio but not yet in QuickBooks or Authorize.Net may simply not have synced yet — check whether it's within the normal sync window before treating it as an exception.

Exception Report

Anything that doesn't match after checking the normal sync window goes on the Exception Report: the record ID, which systems disagree, and the specific discrepancy (missing, amount mismatch, duplicate).

> **CAUTION — What to do with an exception**
> Log it and escalate it to the System Administrator, who has the corrective Utility Flow tools to fix it (covered in the Administrator track). Do not attempt to manually re-enter or delete a transaction in QuickBooks to "fix" the mismatch yourself — that can create a duplicate or make the discrepancy harder to trace.

Audit Trail

Once reconciliation is complete for the day, sign off in the Audit Trail log so there's a record of who reconciled, when, and what exceptions (if any) were found and escalated.

EXERCISE — Complete a Full Day's Reconciliation

Using a full day of production data (or the training-environment equivalent your instructor provides), complete the reconciliation end to end.

1. Pull all three reports (Creatio, QuickBooks, Authorize.Net) for the assigned date.
2. Match every transaction across the three reports using the reconciliation worksheet.
3. For any unmatched item, confirm whether it's still within the normal sync window before logging it as an exception.
4. Log each true exception on the Exception Report with record ID, systems affected, and discrepancy detail.
5. Escalate the logged exceptions to the Administrator.
6. Sign off in the Audit Trail.

Verify:

- Every transaction in all three reports is accounted for — either matched or logged as an exception with escalation. The Audit Trail is signed off.

Knowledge Check

1. Why reconcile daily instead of weekly or monthly?

2. A transaction is in Creatio but not yet in QuickBooks. Is that automatically an exception?

3. Who fixes a logged exception?

Certification Checklist

Track 1 — End User Core

- Create Customer
- Create Order
- Create Invoice
- Process Payment
- Verify synchronization to QuickBooks and Authorize.Net

Track 1a — Accounting Add-On (Accounting Staff)

- Review a full synchronized transaction against Creatio
- Complete a full day's reconciliation across Creatio, QuickBooks, and Authorize.Net
- Correctly identify and escalate an exception

Appendix A — Glossary

Account	A company or organization Pampa Bay does business with.
Contact	An individual person associated with an Account.
Order	A confirmed request to purchase, created in Creatio.
Product	An item or service that can be added to an Order.
Invoice	The billing document generated from an Order.
Payment	The record of money collected against an Invoice.
Credit Memo	A record reducing what a customer owes (refund, return, correction).
Flow	One automated hand-off of information between systems, run by InterWeave.
Status Field	A business-process field end users are expected to update.
Integration Field	A read-only system field showing sync state (Sync Status, External ID, Last Synced) — never manually edited by end users.
Sync Status	An Integration Field showing whether a record has successfully synced (Synced / Processing / Error).
Transaction Status (Authorize.Net)	The state of a payment attempt: Pending, Succeeded, Failed, or Refunded.
Exception	A transaction that doesn't match across Creatio, QuickBooks, and Authorize.Net after the normal sync window has passed.
Audit Trail	The signed-off record of each day's reconciliation.

Appendix B — Knowledge Check Answer Key

For instructor use, or for self-check after attempting each module's Knowledge Check independently.

Module 1: InterWeave Fundamentals

1. In one sentence, what does InterWeave do?
It automatically keeps Creatio, QuickBooks Desktop, and Authorize.Net in agreement so records entered once don't have to be re-typed into each system.

2. If a record looks like it failed to sync, what should you do?
Recognize it and escalate it per the process in Module 6 — do not attempt to fix the sync yourself.

3. Where do you go to search how-to documentation?
help.interweave.biz, the Help Center.

Module 2: Business Process Overview

1. Put these in order: Authorize.Net, QuickBooks Desktop, Creatio (start), InterWeave.
Creatio → InterWeave → QuickBooks Desktop → Authorize.Net → back to Creatio.

2. What turns into an Invoice?
An Order, once it's ready to be billed.

3. Which system "owns" the payment transaction record?
Authorize.Net.

Module 3: Creatio End User Training

1. What's the difference between a Status Field and an Integration Field?
Status Fields track business-process progress and you're expected to update them; Integration Fields show InterWeave's sync state and must never be manually edited.

2. You need a new Product added to the catalog. What do you do?
Escalate the request to the System Administrator — creating or changing Products is an admin-level task.

3. An Invoice total looks wrong on a record that hasn't synced yet. What's the correct fix?
Correct it on the underlying Order, not by editing the Invoice total directly.

Module 4: Payment Processing Basics

1. A customer's card is declined. What Transaction Status will you see, and what should you do?
"Failed" — ask the customer to retry with a different card or payment method.

2. Where should you ever write down a customer's card number?
Nowhere except directly into the payment entry screen.

3. What gets created automatically in Creatio when you issue a refund?
A Credit Memo.

Module 5: Daily Operations Orientation

1. What is a Flow, in your own words?
One automated hand-off of information between systems, e.g. carrying a new Order into QuickBooks as an Invoice.

2. Where do you check sync status for a record you're working on?
On the record itself, in the Sync Status (Integration) field — not the admin Flow console.

Module 6: Recognizing & Escalating Errors

1. You see Sync Status "Error" on an Invoice. What's your first move?
Escalate via the Help Center with the record ID, error text, and a screenshot — do not try to fix it yourself.

2. Name two things you should never do when you spot a sync error.

Repeatedly re-save the record to "force" a fix, and manually edit Integration Fields.

Module 7: Accounting User Training

1. You find an Invoice total in QuickBooks that doesn't match Creatio. What do you do?
Escalate it — don't edit the QuickBooks Invoice directly.

2. Where should a customer's address be corrected — Creatio or QuickBooks?
Creatio, so the correction flows down through the sync.

3. Why can Single User Mode cause a sync delay?
InterWeave needs an open connection to QuickBooks Desktop; Single User Mode can block or delay that connection.

Module 8: Daily Financial Reconciliation

1. Why reconcile daily instead of weekly or monthly?
It catches sync problems within 24 hours, before they compound and become harder to trace.

2. A transaction is in Creatio but not yet in QuickBooks. Is that automatically an exception?
Not necessarily — check whether it's still within the normal sync window first.

3. Who fixes a logged exception?
The System Administrator, using corrective Utility Flow tools — not the Accounting Staff member who found it.

Appendix C — Escalation Ticket Template

Use this template when escalating a sync error or reconciliation exception per Module 6 / Module 8.

Record Type & ID	e.g., Order #12345, Invoice #INV-6789
System(s) Affected	e.g., Creatio ↔ QuickBooks, or Creatio ↔ Authorize.Net
Status / Error Text	Exact text shown, e.g., "Error" or "Processing" since [time]
Time First Noticed	Date and time
Screenshot Attached	Yes / No
Additional Context	e.g., customer reported double charge; QuickBooks was recently in Single User Mode