InterWeave

— PAMPA BAY TRAINING MANUAL

Track 2 – *Administrator*

Creatio · Authorize.Net · QuickBooks Desktop · InterWeave

Configuration, error recovery, connections, security & system health — assumes completion of Track 1

AUDIENCE
System Administrator

EST. DURATION
9 Modules · ~20 Hours

interweave.biz

Pampa Bay Training Manual

Track 2 — Administrator

Creatio + Authorize.Net + QuickBooks Desktop + InterWeave

How to Use This Manual

This manual covers the full Administrator track: configuration, error recovery, connections, security, and system health across Creatio, QuickBooks Desktop, Authorize.Net, and InterWeave. It assumes familiarity with the End User Core track (Track 1) — complete that self-paced or via a shadow session first if you haven't already, so you understand what end users see before diving into the admin-level material here. Each module includes learning objectives, concept explanations, step-by-step procedures, a hands-on exercise, and a short knowledge check.

Learning Path at a Glance

#	Module	Duration	Track
1	InterWeave Fundamentals	2 Hours	Track 2 — Administrator
2	Business Process Overview	2 Hours	Track 2 — Administrator
3	Creatio Administrator	2 Hours	Track 2 — Administrator
4	QuickBooks Administrator	2 Hours	Track 2 — Administrator
5	Payment Processing	3 Hours	Track 2 — Administrator
6	Daily Operations	3 Hours	Track 2 — Administrator
7	Error Management	2 Hours	Track 2 — Administrator
8	Daily Financial Reconciliation (Administrator Perspective)	2 Hours	Track 2 — Administrator
9	System Administration	2 Hours	Track 2 — Administrator

Module 1: InterWeave Fundamentals

Track	Track 2 — Administrator
Duration	2 Hours
Audience	System Administrator

Learning Objectives

- Describe InterWeave's hub-and-spoke architecture
- Explain the difference between real-time and scheduled processing
- Distinguish Production Flows from Utility Flows
- Navigate the Integration Manager, Company Profile, Help Center, and Academy

Hub-and-Spoke Architecture

InterWeave sits at the center of a hub-and-spoke integration: Creatio, QuickBooks Desktop, and Authorize.Net are each a "spoke" that connects only to the hub, not directly to each other. Every hand-off of data passes through InterWeave, which is what lets it enforce consistent mapping, logging, and error handling in one place instead of three separate point-to-point integrations.

> **NOTE — Why this matters operationally**
> Because everything routes through the hub, most integration problems can be diagnosed from one place — the Integration Manager — rather than hunting across three disconnected systems.

Real-Time vs. Scheduled Processing

Real-time Flow	Triggered immediately by an event — e.g., an Order is saved in Creatio, and the corresponding Invoice creation in QuickBooks fires within the normal sync window.
Scheduled Flow	Runs on a timer rather than an event — e.g., a nightly job that reconciles inventory counts or catches anything a real-time trigger missed.

Production Flows vs. Utility Flows

Production Flow	A Flow that moves live business data as part of normal operations (Order → Invoice, Payment → Receive Payment, etc.).
Utility Flow	An administrator-run Flow used for maintenance and correction — re-syncing a specific record, clearing a stuck queue item, or running a one-off correction after an exception is found.

End users interact only with the outcomes of Production Flows. Utility Flows are your tool, covered in depth in Module 6.

Monitoring & Error Logging

The Integration Manager gives you a live view of Flow activity across all three spokes: what ran, when, whether it succeeded, and — for failures — the specific error returned by the receiving system. This is the console-level view; Module 7 covers how to read and act on individual error entries.

Support Process & Documentation

- Help Center (help.interweave.biz) — documentation and how-to articles for both end users and administrators.
- Academy (academy.interweave.biz) — self-paced courses and certification, including the Administrator learning path.
- As Administrator, you are the escalation point for End User Track issues (Module 6/8 of the End User manual) — you'll be the one closing tickets raised there.

Hands-On Walkthrough

Logging In & Orienting

1. Log in with your Administrator credentials.
2. Open Company Profile and review the connected-systems list (Creatio, QuickBooks Desktop, Authorize.Net) and their current connection status.
3. Open the Integration Manager and locate the live Flow activity feed.
4. Confirm you can see both Production and Utility Flow categories.

Academy & Help Center

1. Confirm your Administrator learning path is assigned in the Academy.
2. Search the Help Center for "Integration Manager overview" as a test of the search pattern you'll use throughout this course.

Knowledge Check

1. Why does hub-and-spoke architecture make troubleshooting easier than point-to-point integration?

2. What's the difference between a real-time and a scheduled Flow?

3. What's a Utility Flow used for?

Module 2: Business Process Overview

Track	Track 2 — Administrator
Duration	2 Hours
Audience	System Administrator

Learning Objectives

- Describe the Pampa Bay transaction flow at both the business and Flow level
- Identify which Flow is responsible for each hand-off
- Know where each Business Object's data originates and where it's consumed

The Transaction Flow, End to End

Creatio	InterWeave	QuickBooks Desktop	Authorize.Net	Creatio

You've likely seen this diagram from the business side already. As Administrator, your job is to know which Flow executes each arrow, roughly when it fires, and what it depends on:

Hop	Flow	Trigger
Creatio → QuickBooks	Order-to-Invoice Flow	Real-time, on Order save with a billable stage
QuickBooks → Creatio	Invoice-Confirmation Flow	Real-time, on successful QuickBooks write
Creatio/Invoice → Authorize.Net	Payment-Link / Charge Flow	Real-time, on payment action
Authorize.Net → Creatio & QuickBooks	Payment-Result Flow	Real-time (webhook-driven) plus a scheduled reconciliation pass

Business Objects — Ownership Map

Account / Contact	Owned in Creatio; read-only mirror in QuickBooks.
Order	Owned in Creatio; the origin event for the Order-to-Invoice Flow.
Product	Owned in Creatio (as the sellable item) and mapped to a QuickBooks Item; administrator-managed on both sides.
Invoice	Created in QuickBooks by the Order-to-Invoice Flow; mirrored back to Creatio read-only.
Payment	Originates in Authorize.Net; posted to QuickBooks as a Receive Payment and mirrored to Creatio.
Credit Memo	Originates from an Authorize.Net refund; posted to QuickBooks and mirrored to Creatio.

EXERCISE — Trace a Transaction by Flow

Using the Integration Manager, trace one transaction and identify the specific Flow run responsible for each hop.

1. In Creatio, locate a recently completed Order.
2. In the Integration Manager, filter the Flow activity log to that Order's record ID.
3. Identify the Order-to-Invoice Flow run and note its timestamp and duration.
4. Identify the Payment-Result Flow run(s) tied to the same transaction.
5. Build a timeline: Order saved → Order-to-Invoice Flow → Invoice-Confirmation Flow → Payment action → Payment-Result Flow.

Verify:

- Every Flow run in your timeline is backed by an actual log entry, not assumed.
- The timeline is in the correct chronological order.

Knowledge Check

1. Which Flow creates the QuickBooks Invoice?

2. What triggers the Payment-Result Flow?

3. Where is a Product record owned, and where is it mapped to?

Module 3: Creatio Administrator

Track	Track 2 — Administrator
Duration	2 Hours
Audience	System Administrator

Learning Objectives

- Add and manage custom fields safely
- Understand how Business Rules and Scheduled Jobs affect data flow
- Manage Integration Fields and Security
- Review errors and reset stuck records at the Creatio level

Custom Fields

Any new field you add to an Order, Invoice, or other synced object should be mapped in InterWeave before it's relied on downstream — an unmapped custom field simply won't travel to QuickBooks or Authorize.Net, which is a common source of "why didn't this show up" tickets.

> **CAUTION — Before adding a custom field**
>
> Confirm whether the field needs to sync anywhere. If it does, add the InterWeave field mapping in the same change window as the Creatio field — don't ship one without the other.

Business Rules

Business Rules control what end users can and cannot do to a record (required fields, read-only conditions, stage-gating). Use them to enforce the "what NOT to edit" boundaries end users are trained on — e.g., making Integration Fields read-only isn't just a training instruction, it should also be enforced by a Business Rule.

Scheduled Jobs

Scheduled Jobs run on a timer inside Creatio (distinct from InterWeave's own scheduled Flows) — for example, a nightly cleanup or a stage-aging check. Review the job list periodically to confirm nothing is failing silently.

Integration Fields

These are the fields end users are trained never to touch (Sync Status, External ID, Last Synced). As Administrator, you own them: you may need to clear or reset one manually during error recovery (see Resetting Records below), but changes should always be deliberate and logged, never a guess.

Security

Review role-based permissions periodically to confirm end users have edit access only to the fields they're trained on, and that Integration Fields are locked down at the permission level, not just by convention.

Error Review & Resetting Records

Resetting a Stuck Record

1. Confirm the record is genuinely stuck (Sync Status "Error" or "Processing" well past the normal window) rather than mid-flight.
2. Open the record's Flow log in the Integration Manager and identify the last failed step and its error message.
3. If the underlying cause is fixed (e.g., a mapping or downstream data issue), reset the Sync Status field to allow the Flow to re-run — do not reset it blind, without first identifying why it failed.
4. Re-trigger the Flow (manually or via the next scheduled pass) and confirm it now completes.

5. Log the reset: record ID, original error, fix applied, and outcome.

Monitoring Integration

Beyond individual record troubleshooting, periodically review the Integration Manager's aggregate view — volume of Flow runs, failure rate trend, and any Flow whose average duration is creeping up — to catch systemic issues before they show up as a flood of individual tickets.

EXERCISE — Diagnose and Reset a Stuck Record

Using a training-environment record intentionally set to an error state by your instructor, work through the full reset procedure.

1. Locate the stuck record via the Integration Manager's error filter.
2. Identify the specific failed Flow step and its error message.
3. Determine the root cause (in this training scenario, your instructor will have introduced a specific, identifiable issue).
4. Apply the fix, reset the Sync Status, and re-trigger the Flow.
5. Confirm the record now shows "Synced" and log the incident.

Verify:

- The record reaches "Synced" status.
- Your incident log correctly identifies the root cause, not just the symptom.

Knowledge Check

1. Why should a new custom field be mapped in InterWeave at the same time it's added in Creatio?

2. What should you confirm before resetting a stuck record's Sync Status?

3. How should Business Rules relate to end-user training on Integration Fields?

Module 4: QuickBooks Administrator

Track	Track 2 — Administrator
Duration	2 Hours
Audience	System Administrator

Learning Objectives

- Maintain the Company File and backup schedule
- Understand hosting and QODBC connection requirements
- Test and troubleshoot the QuickBooks connection
- Follow correct restart procedures

Company File Management

InterWeave connects to a single QuickBooks Desktop Company File. Know its location, confirm only one file is in active use (a second/duplicate company file is a common cause of "the sync worked but I don't see it" confusion), and never rename or move the file without updating the connection configuration.

Backups

Confirm the QuickBooks backup schedule runs outside the peak sync window — a backup process can briefly lock the file and cause real-time Flows to queue or retry. Verify backups are actually completing, not just scheduled.

Hosting & QODBC

QODBC is the driver InterWeave uses to read and write QuickBooks Desktop data. If QuickBooks is hosted (rather than local), confirm QODBC is installed and configured on the hosting machine InterWeave actually connects to, not just on a workstation.

Connection Testing

Testing the QuickBooks Connection

1. Open the Integration Manager's connection status panel for the QuickBooks spoke.
2. Run the built-in connection test.
3. If it fails, confirm: QuickBooks is open and the Company File loaded, the machine isn't in Single User Mode exclusively locked by someone else, and QODBC is running.
4. Re-test after resolving any of the above.

Firewall

Confirm the firewall on the hosting machine allows the QODBC/InterWeave connection through the required port. A firewall or antivirus update is a common, easy-to-miss cause of a sync outage that otherwise looks like a QuickBooks problem.

Restart Procedures

Standard Restart Order

1. Pause new Flow triggers for the QuickBooks spoke in the Integration Manager, if a clean stop is needed.
2. Close QuickBooks Desktop fully on the hosting machine.
3. Restart the QODBC service.
4. Reopen QuickBooks Desktop and the correct Company File.
5. Re-test the connection in the Integration Manager before resuming Flow triggers.

Troubleshooting Checklist

- Is QuickBooks open with the correct Company File loaded?
- Is another user in exclusive Single User Mode?
- Is QODBC running?
- Has the firewall/antivirus configuration changed recently?
- Did a Windows or QuickBooks update just install?

EXERCISE — Full Connection Test and Restart

In the training environment, perform a full connection test, then a controlled restart.

1. Run the connection test and record the result.
2. Walk through the restart procedure end to end.
3. Re-test the connection and confirm it passes.
4. Confirm a Production Flow queued during the restart completes successfully afterward.

Verify:

- The connection test passes after restart.
- The queued Flow completes without needing a manual reset.

Knowledge Check

1. What role does QODBC play?

2. Name two causes of a QuickBooks connection failure that aren't actually QuickBooks bugs.

3. Why should backups be scheduled outside the peak sync window?

Module 5: Payment Processing

Track	Track 2 — Administrator
Duration	3 Hours
Audience	System Administrator

Learning Objectives

- Configure and support the full Authorize.Net payment lifecycle
- Understand Webhooks and Settlement
- Diagnose payment failures
- Handle Recurring Billing

Authorize.Net Overview (Administrator Depth)

End users initiate Payment Links, take card payments, and issue refunds (see the End User manual, Module 4). As Administrator, you own the configuration behind those actions: API/webhook connectivity, Recurring Billing setup, and diagnosing failures that end users can only escalate.

Webhooks

Authorize.Net notifies InterWeave of payment events (succeeded, failed, refunded) via webhooks. If webhook delivery is disrupted, payment results stop flowing back into Creatio/QuickBooks even though Authorize.Net itself is processing normally — this looks like a sync problem but is a connectivity/configuration issue on the webhook endpoint.

> **CAUTION — Webhook health**
> Periodically confirm webhook delivery success in Authorize.Net's dashboard. A string of failed webhook deliveries is often the real root cause behind a batch of "payment succeeded but Creatio still shows Pending" tickets.

Settlement

Settlement is the process by which Authorize.Net funds actually deposit to Pampa Bay's bank account, on Authorize.Net's payout schedule — distinct from the transaction succeeding. The Settlement report (used in Accounting's daily reconciliation) reflects what funded, which can lag a day or more behind the Transaction Status.

Recurring Billing

For any customer on a recurring billing schedule, confirm the subscription/schedule is correctly configured in Authorize.Net and mapped to the right Creatio Account. A misconfigured recurring schedule is harder to catch than a one-off payment error because it fails silently until the customer notices a missed charge or invoice.

Payment Failures

Diagnosing a Payment Failure

1. Confirm the Transaction Status and the specific decline/error reason in Authorize.Net.
2. Determine whether the failure is customer-side (declined card) or system-side (webhook/API error).
3. For customer-side failures, this is normal — no admin action needed beyond what end-user process already covers.
4. For system-side failures, check webhook delivery status and API connectivity before assuming a card issue.

> **EXERCISE — Process a Payment, a Refund, and a Failed Card**

Using the Authorize.Net training environment, run all three scenarios and verify the full round-trip back to Creatio.

1. Process a successful test payment and confirm it lands in Creatio and QuickBooks correctly.
2. Issue a refund and confirm the Credit Memo generates correctly on both sides.
3. Trigger a test failed-card scenario and confirm the Transaction Status reflects "Failed" and no Payment record is incorrectly created.
4. Check webhook delivery status in Authorize.Net for all three events.

Verify:

- All three scenarios reflect correctly and consistently across Authorize.Net, Creatio, and QuickBooks.
- Webhook delivery shows success for all three.

Knowledge Check

1. A payment succeeded in Authorize.Net but Creatio still shows "Pending." What should you check first?

2. What's the difference between a transaction "succeeding" and "settling"?

3. Why is a misconfigured recurring billing schedule riskier than a one-off payment failure?

Module 6: Daily Operations

Track	Track 2 — Administrator
Duration	3 Hours
Audience	System Administrator

Learning Objectives

- Monitor Production and Utility Flows
- Restart a Flow and interpret logs
- Understand binding and synchronization
- Run retry and exception processing

Production Flows

These are the Flows covered conceptually in Module 2 — the live business-data hand-offs. Day to day, your job is to watch their success rate and step in when one fails.

Utility Flows

Utility Flows are your correction tools: re-sync a specific record, re-run a failed step, or push a manual correction. Every Utility Flow run should be logged with a reason — these are audited, since they touch production data directly.

Restarting Flows

Restarting a Failed Production Flow

1. Identify the failed Flow run in the Integration Manager and read its error message.
2. Confirm the underlying cause is resolved (data fix, connection fix, mapping fix).
3. Restart the specific Flow run rather than a broad re-sync, when possible, to limit blast radius.
4. Confirm the restart completes successfully and log the action.

Viewing Logs

Each Flow run's log shows: trigger time, each step executed, the payload sent/received at the failing step (if any), and the exact error text. Always read the failing step's payload, not just the summary error — the summary often just says "failed," while the payload shows why.

Binding

Binding is how InterWeave links a Creatio record to its corresponding QuickBooks/Authorize.Net record (via the External ID / Integration Fields end users are trained not to touch). A binding error means the link itself is broken or ambiguous — often from a duplicate record on one side — and is a distinct failure mode from a simple data-mapping error.

Synchronization & Monitoring

Beyond individual Flow runs, monitor overall sync health: queue depth, average Flow duration, and failure rate. A slowly growing queue is an early warning sign worth investigating before it becomes a backlog.

Retry Processing

Most transient failures (a brief connection drop, a momentary lock) are retried automatically on a backoff schedule. Manual retry is for failures that didn't auto-resolve, or where you've fixed the underlying cause and want to trigger the retry immediately rather than wait.

Exception Processing

This is where Accounting Staff's escalations (End User manual, Module 6/8) land. Each exception should be triaged: root cause identified, corrective Utility Flow run if needed, and the outcome reported back so Accounting can close their Exception Report entry.

EXERCISE — Run a Utility Flow, a Production Flow, and Retry a Failed Transaction

Using training-environment scenarios provided by your instructor.

1. Run a Production Flow manually and confirm it in the log.
2. Run a Utility Flow to correct a training-environment record, logging your reason.
3. Locate a failed transaction, diagnose the root cause from the log payload (not just the summary), fix it, and retry.
4. Confirm the retried transaction completes and update the log with the outcome.

Verify:

- Every action (Production run, Utility run, retry) is logged with a reason and an outcome.
- The retried transaction reaches a fully synced state.

Knowledge Check

1. Why should Utility Flow runs be logged with a reason?

2. What's a binding error, distinct from a simple mapping error?

3. When should you read a Flow's payload instead of just its summary error?

Module 7: Error Management

Track	Track 2 — Administrator
Duration	2 Hours
Audience	System Administrator

Learning Objectives

- Read error logs fluently
- Recognize common QuickBooks error patterns
- Resolve duplicate records and binding errors
- Follow correct recovery and escalation procedures

Reading Error Logs

A useful triage habit: read the error in this order — which Flow, which step, which system returned the error, and the exact message text. Skipping straight to "try re-running it" without this triage is how the same error recurs.

Common QuickBooks Errors

Duplicate record found	Usually a Customer or Item that already exists under a slightly different name; requires manual merge or rename before re-sync.
Record is in use	Another process or user (often Single User Mode) has the target record locked; retry after the lock clears.
Field exceeds maximum length	Data from Creatio exceeds a QuickBooks field's character limit — a mapping/validation issue to fix at the source.
Connection lost mid-transaction	A network or QuickBooks availability blip; usually resolved by retry once connectivity is confirmed (Module 4).

Duplicate Records

Resolving a Duplicate

1. Identify which record is the correct "source of truth" (usually the one with the most complete transaction history).
2. Merge or rename the duplicate in QuickBooks so only one record remains.
3. Re-bind the Creatio record to the correct QuickBooks record if binding was pointing at the wrong one.
4. Re-trigger the failed Flow and confirm it completes.

Binding Errors

Covered conceptually in Module 6 — in practice, resolving one means confirming which side has the correct record, fixing the link, and re-syncing. Never delete the "losing" record in QuickBooks without confirming it has no legitimate transaction history of its own.

Network Failures

Distinguish a one-off network blip (safe to retry) from a pattern (recurring at the same time of day, or correlated with a specific process) — the latter needs root-cause investigation, not repeated retries.

Recovery Procedures & Escalation

Most errors resolve within this module's scope. Escalate beyond yourself (to InterWeave support via the Help Center) when: the error message doesn't match any known pattern, the same error recurs after a confirmed fix, or the issue appears to be on InterWeave's platform side rather than Pampa Bay's configuration.

EXERCISE — Resolve Five Common Production Errors

Your instructor will seed five distinct error scenarios in the training environment, covering the patterns above.

1. For each error, triage using the reading order in this module (Flow, step, system, exact message).
2. Classify each as: duplicate record, binding error, field/validation error, network/lock issue, or unknown.
3. Resolve the four known-pattern errors following the applicable procedure.
4. For the fifth (seeded as an unfamiliar pattern), draft the escalation you would submit rather than guessing at a fix.

Verify:

- Four errors are fully resolved and their records show "Synced."
- The fifth has a well-formed escalation, not a guessed fix.

Knowledge Check

1. What's the correct first step when triaging any error?

2. When merging a duplicate record, what should you confirm before deleting the losing one?

3. When should you escalate to InterWeave support rather than keep troubleshooting?

Module 8: Daily Financial Reconciliation (Administrator Perspective)

Track	Track 2 — Administrator
Duration	2 Hours
Audience	System Administrator

Learning Objectives

- Review the Exception Report escalated by Accounting Staff
- Apply corrective Utility Flows to resolve exceptions
- Maintain the Audit Trail from the administrator side

Where This Picks Up

Accounting Staff run the daily reconciliation and log exceptions (Accounting Add-On manual, Module 8). Your job is to resolve what they escalate — you are not expected to independently re-run the full three-way reconciliation, only to close out flagged exceptions.

Reviewing the Exception Report

Each entry gives you a record ID, which systems disagree, and the specific discrepancy. Start there rather than re-deriving the mismatch from scratch — Accounting has already done that matching work.

Corrective Utility Flows

Resolving a Reconciliation Exception

1. Open the flagged record in the Integration Manager and review its full Flow history.
2. Identify why it diverged: missed trigger, binding error, timing (still mid-flight when Accounting pulled their reports), or a genuine data mismatch.
3. If it was simply mid-flight, confirm it has since completed and no action is needed — note this back to Accounting.
4. If it's a genuine issue, run the appropriate corrective Utility Flow and confirm all three systems now agree.
5. Report the resolution back to Accounting so they can close their Exception Report entry.

Audit Trail

Every corrective action tied to a reconciliation exception should be logged with: the original discrepancy, root cause, action taken, and confirmation all three systems now match. This is what makes the daily reconciliation defensible later if a broader audit asks why a number moved.

EXERCISE — Resolve a Batch of Escalated Exceptions

Using an Exception Report provided by your instructor (simulating Accounting Staff's output from their Module 8 exercise).

1. Triage each exception: mid-flight (no action) vs. genuine issue.
2. For genuine issues, identify root cause and apply the correct Utility Flow.
3. Confirm all three systems agree after correction.
4. Log each resolution and draft the reply you'd send back to Accounting.

Verify:

- Every exception has a documented root cause and resolution or an explicit "no action needed, was mid-flight" note.

- All three systems agree for every genuine-issue exception after your fix.

Knowledge Check

1. Should you re-run the full three-way match yourself, or start from Accounting's Exception Report?

2. An exception turns out to be a record that was simply still mid-sync. What do you do?

3. What should every corrective action in the Audit Trail include?

Module 9: System Administration

Track	Track 2 — Administrator
Duration	2 Hours
Audience	System Administrator

Learning Objectives

- Manage users and permissions across the integration
- Maintain Company Profile and Connection Credentials
- Configure scheduling and notifications
- Manage support tickets and documentation

Users & Permissions

Provision new staff into the correct track-based role (End User, Accounting, Administrator) rather than granting broad access by default — the whole point of the role-based training structure is that access should match training completed. Review permissions periodically, especially Integration Field lock-down (Module 3).

Company Profile & Connection Credentials

Company Profile holds the connection configuration for all three spokes. Connection credentials (API keys, QODBC connection details, Authorize.Net keys) should be rotated per your organization's security policy and never shared outside the Administrator role.

> **CAUTION — Credential handling**
>
> Never paste live credentials into a ticket, chat message, or shared document. If InterWeave support needs to verify a connection, use their supported secure method, not plain text.

Scheduling

Review the schedule for all Scheduled Flows and Scheduled Jobs (Module 3) together — staggering them (e.g., not running a QuickBooks backup and a scheduled reconciliation Flow at the same time) avoids the resource contention covered in Module 4.

Notifications

Confirm failure notifications route to you (or your team) promptly — a Flow failure that sits silent until someone notices missing data is far more expensive to fix than one caught within minutes.

Support Tickets

You are the closer for End User and Accounting escalations, and the opener for anything you need to send up to InterWeave support. Keep the ticket trail complete — record ID, root cause, resolution — both for your own future reference and for InterWeave support if a pattern needs their attention.

Documentation & Academy

Keep Pampa Bay-specific documentation (this manual, the Administrator Guide, the escalation templates) current as configuration changes — stale documentation is worse than none, because staff trust it by default.

> **EXERCISE — Provision a New User and Review Connection Health**
>
> *In the training environment, complete a full administrative cycle.*

1. Provision a new training user into the correct role-based track.
2. Confirm their permissions match that track (no Integration Field edit access unless Administrator).
3. Review Company Profile connection status for all three spokes.
4. Confirm notification routing is correctly configured for Flow failures.

Verify:

- The new user's access exactly matches their assigned track — no more, no less.
- All three spoke connections show healthy status.

Knowledge Check

1. Why provision new staff by track-based role rather than broad default access?

2. Where should live connection credentials ever be pasted?

3. Why keep Pampa Bay-specific documentation current rather than static?

Certification Checklist

Administrator Certification

- All End User Core certification items (Create Customer, Order, Invoice; process a payment; verify sync)
- Run a Utility Flow
- Resolve a production error
- Complete Daily Reconciliation, including corrective action on a flagged exception

Appendix A — Glossary

Hub-and-Spoke	InterWeave is the hub; Creatio, QuickBooks, and Authorize.Net are spokes that connect only to it, not directly to each other.
Production Flow	A Flow that moves live business data as part of normal operations.
Utility Flow	An administrator-run Flow used for maintenance and correction.
Real-time Flow	Triggered immediately by an event.
Scheduled Flow	Runs on a timer rather than an event.
Binding	The link between a Creatio record and its corresponding QuickBooks/Authorize.Net record.
QODBC	The driver InterWeave uses to read and write QuickBooks Desktop data.
Webhook	Authorize.Net's mechanism for notifying InterWeave of payment events in real time.
Settlement	The deposit of funds from Authorize.Net to Pampa Bay's bank account, distinct from a transaction succeeding.
Exception	A transaction that doesn't match across Creatio, QuickBooks, and Authorize.Net after the normal sync window.
Integration Field	A read-only (to end users) system field showing sync state — Sync Status, External ID, Last Synced.

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. Why does hub-and-spoke architecture make troubleshooting easier than point-to-point integration?
All Flow activity routes through and is logged by one central hub (InterWeave), so you can diagnose from a single console instead of checking each system separately.

2. What's the difference between a real-time and a scheduled Flow?
Real-time is triggered immediately by an event; scheduled runs on a timer regardless of individual events.

3. What's a Utility Flow used for?
Administrator-run maintenance and correction — re-syncing a record or clearing a stuck item — as opposed to normal live business data movement.

Module 2: Business Process Overview

1. Which Flow creates the QuickBooks Invoice?
The Order-to-Invoice Flow, triggered in real time when an Order is saved with a billable stage.

2. What triggers the Payment-Result Flow?
A Authorize.Net webhook in real time, backed up by a scheduled reconciliation pass.

3. Where is a Product record owned, and where is it mapped to?
Owned in Creatio as the sellable item, mapped to a corresponding QuickBooks Item.

Module 3: Creatio Administrator

1. Why should a new custom field be mapped in InterWeave at the same time it's added in Creatio?
An unmapped field won't sync downstream, causing data to silently fail to appear in QuickBooks or Authorize.Net.

2. What should you confirm before resetting a stuck record's Sync Status?
That you've identified and fixed the actual root cause — don't reset blind.

3. How should Business Rules relate to end-user training on Integration Fields?
They should enforce the same boundary at the permission level, not rely on training alone.

Module 4: QuickBooks Administrator

1. What role does QODBC play?
It's the driver InterWeave uses to read and write QuickBooks Desktop data.

2. Name two causes of a QuickBooks connection failure that aren't actually QuickBooks bugs.
Exclusive Single User Mode held by another user, and a firewall/antivirus change blocking the port.

3. Why should backups be scheduled outside the peak sync window?
A backup can briefly lock the Company File, causing real-time Flows to queue or retry.

Module 5: Payment Processing

1. A payment succeeded in Authorize.Net but Creatio still shows "Pending." What should you check first?
Webhook delivery status — this is a common root cause distinct from an actual sync failure.

2. What's the difference between a transaction "succeeding" and "settling"?
Succeeding means the charge went through; settling is the later deposit of funds to the bank account, which can lag.

3. Why is a misconfigured recurring billing schedule riskier than a one-off payment failure?
It fails silently until a customer notices a missed charge, rather than surfacing immediately.

Module 6: Daily Operations

1. Why should Utility Flow runs be logged with a reason?

They directly touch production data and are audited — an unexplained manual correction is hard to trust or trace later.

2. What's a binding error, distinct from a simple mapping error?
The link between a Creatio record and its QuickBooks/Authorize.Net counterpart is broken or ambiguous, often due to a duplicate record.

3. When should you read a Flow's payload instead of just its summary error?
Always, when diagnosing a failure — the summary often just says "failed" while the payload shows the actual cause.

Module 7: Error Management

1. What's the correct first step when triaging any error?
Identify which Flow, which step, which system returned it, and read the exact message — before attempting a fix.

2. When merging a duplicate record, what should you confirm before deleting the losing one?
That it has no legitimate transaction history of its own.

3. When should you escalate to InterWeave support rather than keep troubleshooting?
When the error doesn't match a known pattern, recurs after a confirmed fix, or looks like a platform-side issue.

Module 8: Daily Financial Reconciliation (Administrator Perspective)

1. Should you re-run the full three-way match yourself, or start from Accounting's Exception Report?
Start from their report — they've already done the matching; your job is to resolve what they flag.

2. An exception turns out to be a record that was simply still mid-sync. What do you do?
Confirm it has since completed, take no corrective action, and report that back to Accounting.

3. What should every corrective action in the Audit Trail include?
The original discrepancy, root cause, action taken, and confirmation all three systems now match.

Module 9: System Administration

1. Why provision new staff by track-based role rather than broad default access?
Access should match training completed — the role-based structure only holds if permissions enforce it.

2. Where should live connection credentials ever be pasted?
Nowhere except InterWeave support's supported secure method — never a ticket, chat, or shared document.

3. Why keep Pampa Bay-specific documentation current rather than static?
Staff trust documentation by default; stale documentation is more dangerous than no documentation.

Appendix C — Escalation-to-InterWeave-Support Template

Use this template when an issue is beyond Pampa Bay's own configuration and needs InterWeave platform support.

Flow / Record ID	The specific Flow run and/or record ID affected
Systems Affected	e.g., Creatio ↔ QuickBooks, or Creatio ↔ Authorize.Net
Error Message (exact text)	Copied verbatim from the Flow log payload
Steps Already Taken	What you've already checked/tried (connection test, retry, root-cause review)
Pattern	One-off or recurring? If recurring, frequency and any correlation noticed
Business Impact	e.g., blocking daily reconciliation, affecting customer payment confirmation