

— PAMPA BAY TRAINING MANUAL

Track 3 – *Executive Sponsor*

*Creatio · Authorize.Net · QuickBooks Desktop ·
InterWeave*

A short briefing track — no hands-on exercises or certification required

AUDIENCE

Executive Sponsor

EST. DURATION

3 Modules · ~2–3 Hours

• interweave.biz

Pampa Bay Training Manual

Track 3 — Executive Sponsor

Creatio + Authorize.Net + QuickBooks Desktop + InterWeave

How to Use This Manual

This is a short briefing track — roughly 2-3 hours total, no hands-on exercises or certification required. It's meant to give you enough context to understand what the End User, Accounting, and Administrator tracks train staff to do, and how to judge whether the program is working.

Learning Path at a Glance

#	Module	Duration	Track
1	InterWeave Fundamentals (Briefing)	1 Hour	Track 3 — Executive Sponsor
2	Business Process Overview (Walkthrough)	1 Hour	Track 3 — Executive Sponsor
3	Program Outcomes Briefing	0.5–1 Hour	Track 3 — Executive Sponsor

Module 1: InterWeave Fundamentals (Briefing)

Track	Track 3 — Executive Sponsor
Duration	1 Hour
Audience	Executive Sponsor

Learning Objectives

- Explain in business terms what InterWeave does for Pampa Bay
- Understand what problem it solves and what it costs to run
- Know the support process at a glance

The Business Problem

Before InterWeave, Pampa Bay staff entered the same order, invoice, and payment information into three separate systems by hand — Creatio for sales, QuickBooks Desktop for accounting, and Authorize.Net for payments. Manual re-entry across three systems reliably drifts out of agreement over time: a payment gets recorded in one place and missed in another, an order total is corrected in one system but not the others. That drift is expensive to find and even more expensive to unwind once it's compounded over weeks or months.

What InterWeave Does

InterWeave is the automated connection between those three systems. Staff enter information once, in Creatio, and InterWeave carries it automatically to QuickBooks and Authorize.Net — and carries payment results back. The three systems stay in agreement without anyone re-typing anything.

NOTE — The one-sentence version

InterWeave keeps Creatio, QuickBooks, and Authorize.Net saying the same thing, automatically, so staff enter data once instead of three times.

What This Program Trains

This training program is split by role rather than one blanket course for everyone, because the risk profile of each role is different. Front-line staff (Accounting, Customer Service, Sales) are trained to operate the system day-to-day and to recognize and escalate anything unusual — they are deliberately not trained or given access to change how the systems are connected. That configuration, error-recovery, and connection-level work is reserved for the System Administrator, who carries the deeper technical training.

Support Process at a Glance

Pampa Bay's System Administrator is the first line of support for day-to-day issues; InterWeave's own support (via their Help Center) is the second line for anything beyond Pampa Bay's configuration. You are not expected to interact with either directly as part of this program.

Module 2: Business Process Overview (Walkthrough)

Track	Track 3 — Executive Sponsor
Duration	1 Hour
Audience	Executive Sponsor

Learning Objectives

- Follow a transaction from quote to payment at a business level
- Understand where money and data actually flow

The Transaction Flow

Creatio	InterWeave	QuickBooks Desktop	Authorize.Net	Creatio
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A transaction starts when Sales or Customer Service creates an Order in Creatio. InterWeave automatically turns that into an Invoice in QuickBooks. A payment is then collected through Authorize.Net, and the result — paid, failed, or refunded — flows back through InterWeave into Creatio, closing the loop. Every dollar Pampa Bay collects moves through this same path.

What Each System Is Responsible For

Creatio	The customer and sales relationship — who the customer is, what they ordered.
QuickBooks Desktop	The books — the official accounting record.
Authorize.Net	The actual movement of money — charging and refunding customers.
InterWeave	The connective layer keeping the other three in sync, automatically.

Why This Matters at the Business Level

This flow is why Pampa Bay's daily financial reconciliation (performed by Accounting Staff and reviewed by the Administrator, per the Accounting and Administrator tracks of this program) can catch a discrepancy the same day it happens, rather than at month-end close.

Module 3: Program Outcomes Briefing

Track	Track 3 — Executive Sponsor
Duration	0.5–1 Hour
Audience	Executive Sponsor

Learning Objectives

- Understand what staff are certified to do at the end of each track
- Know how to gauge whether the training investment is paying off

What "Done" Looks Like, By Track

Track	Certified Outcome
End User Core (Accounting, Customer Service, Sales Ops)	Create Customer, Order, and Invoice; process a payment; verify it synchronized correctly to QuickBooks and Authorize.Net.
Accounting Add-On (Accounting Staff)	Review a synchronized transaction end-to-end; complete a full day's reconciliation across all three systems; correctly identify and escalate a discrepancy.
Administrator	All End User outcomes, plus: run a Utility Flow, resolve a production error, and complete daily reconciliation including corrective action on a flagged exception.

How to Read Progress

Each certified staff member has demonstrated the checklist above in a hands-on exercise, not just sat through a lecture. If you want a pulse check on the program, the most useful question to ask your Administrator is: "How many staff are certified per track, and what's in the current exception/escalation backlog?" — a shrinking backlog and rising certification count are the two real signals this program is working.

Optional: Sitting In

You're welcome to sit in as an observer on any End User or Administrator exercise session if you'd like a closer look at how the system actually works day-to-day. No hands-on participation or certification is expected of you.

Appendix A — Glossary

Creatio	The CRM — customer and sales relationship data.
QuickBooks Desktop	The accounting system of record.
Authorize.Net	The payment processor.
InterWeave	The automated connection layer keeping the other three systems in sync.
Sync	The automatic transfer of a record's data from one system to another.
Exception	A transaction that doesn't match across systems and needs review.