InterWeave

SMARTINTEGRATION HUB · AI-DRIVEN ENTERPRISE INTEGRATION PLATFORM

Implementation *Guide*

Creatio CRM ↔ Microsoft Dynamics 365 Business Central Integration

Partner & Consultant Technical Reference

PREPARED FOR

Net@Work

STATUS

Version 0.1 — Working Draft · Confidential

interweave.biz

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Document Control

Revision History

Version	Date	Author	Summary of Changes
0.1	August] 2026	**Inter**Weave — Bruce Magown	Initial working draft scaffold. Architecture, **Smart**Flow, and platform-concept sections drafted from published proposal material and interweave.biz. Sections requiring **Inter**Weave engineering input (installation steps, BC/Creatio API setup, field-level mapping specifics, error codes, admin console) marked as placeholders — see callout boxes throughout.

ENGINEERING INPUT NEEDED

This is a working draft, not a finished partner deliverable. Every section marked "Engineering Input Needed" below must be completed and technically validated by **Inter**Weave engineering before this guide is shared externally with Net@Work or any other partner.

Confidentiality

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How to Use This Guide

This guide is organized as a reference manual for implementation consultants working on a Creatio ↔ Microsoft Dynamics 365 Business Central integration built on the **Inter**Weave **Smart**Integration Hub. It follows the natural lifecycle of an engagement — install, configure, map, build, operate, and support — so a consultant can read it end-to-end during onboarding or jump directly to the part relevant to the task at hand.

Part	Guide	Use When
1	Installation Guide	Standing up the **Smart**Integration Hub connector for the first time in a new environment.
2	Connector Configuration Guide	Connecting the installed connector to a specific Creatio and Business Central tenant.
3	Business Central Guide	Working through Business Central–specific setup: API access, permissions, deployment type.
4	Creatio Guide	Working through Creatio–specific setup: API access, entities, permissions.
5	**Smart**Flow Development Guide	Building, customizing, or extending a **Smart**Flow beyond the standard BC-01–BC-04 set.
6	Field Mapping Guide	Defining or changing how fields and entities map between the two systems.
7	Troubleshooting Guide	Diagnosing a sync error, reviewing logs, or resolving a data mismatch.
8	Administration Guide	Ongoing administration: users, monitoring, environments, reporting.
9	Best Practices Guide	Planning an implementation approach or reviewing design decisions.
10	Operations Runbook	Running steady-state operations after go-live, including incident response.
11	Consultant Certification Manual	Onboarding and certifying new consultants on the **Inter**Weave platform.

Conventions Used in This Guide

- Text in a teal callout box marked NOTE is supplementary context.
- Text in a red callout box marked CAUTION identifies a risk of data loss, duplicate records, or a partial write.
- Text in an amber callout box marked ENGINEERING INPUT NEEDED marks a section that is structurally complete but requires real technical detail — exact steps, screenshots, field names, version numbers — from **Inter**Weave engineering before it is considered final.
- Checklists (☐) are meant to be worked through in order and signed off during an engagement.

Audience & Prerequisites

Who This Guide Is For

This guide is written for implementation consultants, solution architects, and support engineers at **Inter**Weave partner organizations — including Net@Work — who are responsible for installing, configuring, building, or supporting a Creatio ↔ Business Central integration on the **Inter**Weave **Smart**Integration Hub.

Assumed Knowledge

- General familiarity with Microsoft Dynamics 365 Business Central administration (users, permission sets, company setup).
- General familiarity with Creatio CRM configuration (sections, business processes, roles).
- Basic understanding of REST APIs, OAuth 2.0, and webhook-based integration patterns.
- No custom development experience is required to configure standard **Smart**Flows. **Smart**Flow Development (Part 5) assumes comfort with structured configuration, not code.

What You'll Need Before Starting

☐ Active **Inter**Weave partner account and sandbox environment access (see Part 11, Section 11.8).

☐ Administrator-level access to a Business Central sandbox environment.

☐ Administrator-level access to a Creatio sandbox environment.

☐ This guide, the **Inter**Weave Creatio ↔ Business Central Proposal, and the **Inter**Weave Partner Portal (partner.interweave.biz) bookmarked for reference.

PART 1

Installation Guide

*Standing up the **Smart**Integration Hub connector in a new environment*

1.1 Architecture Recap

The **Inter**Weave **Smart**Integration Hub operates as an event-driven middleware layer between Creatio CRM and Microsoft Dynamics 365 Business Central. Neither system is modified to support the integration — no custom fields, schema changes, or code are added to Creatio or Business Central themselves. All sync logic, transformation rules, and orchestration live inside the Hub's configurable rule layer.

Installation, in this context, means provisioning a Hub instance (or partner-managed tenant) and establishing the network and credential path between that instance and the customer's Creatio and Business Central environments. The Hub is delivered as a managed SaaS service; "installation" is primarily a configuration and connectivity exercise rather than a software deployment onto customer infrastructure.

Layer	Role in Installation
SmartIntegration **Hub**	The core service instance being provisioned. One Hub instance can serve one customer's full Creatio ↔ Business Central integration.
Connector Ecosystem	Pre-built connectors for Creatio (REST API) and Business Central (OData API v2.0 / v4). Installed and licensed as part of Hub provisioning.
SmartFlows	Not installed separately — configured after the Hub and both connectors are live. See Part 2.
IWSyncRegistry / IWSyncLog	System tables created automatically inside the Hub instance during provisioning. No customer-side installation required.

1.2 System Requirements

Hub Environment

The **Smart**Integration Hub is hosted by **Inter**Weave as SaaS; no on-premises server is required for the Hub itself. Connectivity requirements are outbound-only from the customer's Business Central and Creatio environments unless Business Central is deployed on-premises (see Part 3, Section 3.6).

> **ENGINEERING INPUT NEEDED**
> Confirm current minimum requirements with **Inter**Weave engineering before publishing: outbound firewall allow-list (hostnames/IP ranges), TLS version floor, required ports, and any regional hosting options (US/EU data residency) that may be relevant to a Net@Work client.

Business Central Requirements

- Business Central Online (SaaS), On-Premises, or Business Central with Power Platform — see Part 3, Section 3.1 for supported deployment types.
- An Azure AD tenant with rights to register an application (Business Central Online) or an accessible on-premises web service tier (Business Central On-Premises).
- A named integration user or service account with the permission set defined in Part 3, Section 3.4.

Creatio Requirements

- Creatio REST API enabled for the target environment.
- A dedicated integration user with the security role defined in Part 4, Section 4.5.

- Outbound webhook endpoint reachability if event-driven (rather than polling) triggers are used — see Part 4, Section 4.3.

1.3 Pre-Installation Checklist

Complete this checklist with the customer before scheduling the Phase 1 kickoff described in the proposal's eight-week implementation plan.

☐ Business Central deployment type confirmed (Online / On-Premises / Power Platform).

☐ Business Central tenant/company ID(s) identified for sandbox and production.

☐ Creatio environment URL and edition confirmed.

☐ Integration user accounts created in both systems (or a named owner assigned to create them).

☐ Network/firewall change owner identified on the customer side, if required.

☐ **Inter**Weave partner sandbox environment provisioned for the consultant (see Part 11, Section 11.8).

☐ Kickoff meeting scheduled with the customer's CRM and Finance stakeholders.

1.4 Provisioning the **Smart**Integration **Hub**

> **ENGINEERING INPUT NEEDED**
>
> This section needs the actual step-by-step provisioning flow from **Inter**Weave engineering: how a new Hub instance is requested/created, where credentials are entered, and what the partner-facing provisioning UI or CLI looks like. Outline below is structural only — verify every step against the current platform before use.

1. Request a new Hub instance for the customer through the **Inter**Weave Partner Portal (partner.interweave.biz).
2. Select the connector pack: Creatio (source) and Business Central (target/source, bi-directional).
3. Enter Business Central connection details (deployment type, tenant/company ID, authentication method — see Part 3).
4. Enter Creatio connection details (environment URL, API credentials — see Part 4).
5. Run the built-in connectivity test for both systems.
6. Confirm the Hub instance status shows "Connected" for both Creatio and Business Central before proceeding to Part 2.

1.5 Initial Environment Configuration

After both connectors report a successful connection, complete baseline configuration before any **Smart**Flow is enabled:

- Assign environment labels (Sandbox / Production) to prevent test data from syncing into a live Business Central company.
- Set the default conflict-resolution policy (source-of-truth by field or by system) — see Part 6, Section 6.4 and Part 9, Section 9.3.
- Configure IWSyncLog retention period (see Part 8, Section 8.5).
- Assign initial admin and consultant users within the Hub instance (see Part 8, Section 8.1).

1.6 Verifying the Installation

Before proceeding to connector configuration (Part 2), confirm the installation is healthy:

☐ Hub instance status: Connected (Creatio) and Connected (Business Central).

☐ A test record created in Creatio sandbox appears in IWSyncLog with a logged event (even if no **Smart**Flow is active yet, the connector should log connectivity heartbeats).

☐ A test record created in Business Central sandbox appears in IWSyncLog similarly.

☐ No authentication or permission errors reported in the Hub's connection diagnostics panel.

NOTE

A clean installation should show zero sync activity beyond connectivity heartbeats until the first **Smart**Flow (BC-01) is deployed in Part 2. If test records are already syncing at this stage, a **Smart**Flow may already be enabled from a prior environment — verify before continuing.

1.7 If Something Goes Wrong

Installation-stage issues are almost always authentication, permission, or network connectivity problems rather than platform defects. Part 7 (Troubleshooting Guide) contains the full diagnostic workflow and common error reference. The most frequent installation-stage issues are summarized here for convenience:

Symptom	Likely Cause	Where to Look
Business Central connector shows "Not Connected"	Azure AD app registration missing a required scope, or OAuth token expired	Part 3, Section 3.2; Part 7, Section 7.3
Creatio connector shows "Not Connected"	REST API not enabled, or integration user lacks the required security role	Part 4, Sections 4.2 & 4.5; Part 7, Section 7.3
Connection test succeeds but no heartbeat events appear	Firewall blocking outbound traffic from Business Central On-Premises web service tier	Part 3, Section 3.6; Part 7, Section 7.4

PART 2

SmartIntegration **Configuration Guide**

Connecting a Hub instance to a specific Creatio and Business Central tenant

2.1 **Smart**Integration **Hub Architecture Overview**

Every sync event passes through three configurable layers inside the **Smart**Integration Hub before it is written to the receiving system:

Layer	Function
L1 — Entity Match	Determines whether an incoming record corresponds to an existing record in the receiving system, matching by tax ID, email, or external ID. Prevents duplicate creation.
L2 — Transformation	Converts field values between systems: currency, tax codes, units of measure, address formats, and picklist/status values.
L3 — Orchestration	Sequences the write, applies conflict-resolution rules, retries on transient failure, and writes the final record with a complete audit trail.

Every sync attempt — successful or not — is written to IWSyncLog with a timestamp, source event, and result. Every synced entity carries a status in IWSyncRegistry (synced / pending / error), giving consultants and support staff a single place to check the health of any given record. See Part 7 for the full reference.

2.2 Connecting to Creatio

> **ENGINEERING INPUT NEEDED**
> Replace with the actual Creatio connection screen walkthrough: field names in the Hub's connector configuration UI, exact OAuth/API-key flow, and screenshots. Structural outline only below.

1. In the Hub instance, open Connectors → Creatio.
2. Enter the Creatio environment base URL.
3. Choose the authentication method (OAuth 2.0 client credentials is the standard pattern for the integration user described in Part 4, Section 4.2).
4. Enter the integration user's client ID and secret (or generate them directly from this screen if the Hub supports Creatio app registration).
5. Run "Test Connection." A successful test returns the Creatio environment version and confirms the integration user's assigned security role.

2.3 Connecting to Business Central

Business Central connection setup depends on deployment type (Online, On-Premises, or Power Platform). The full walkthrough for each is in Part 3. At a summary level, from within the Hub:

1. In the Hub instance, open Connectors → Business Central.
2. Select the deployment type.
3. For Business Central Online: authenticate via the Azure AD app registration described in Part 3, Section 3.2.
4. For On-Premises: enter the web service tier endpoint described in Part 3, Section 3.6.
5. Select the target company (or companies — see Part 8, Section 8.4 for multi-company environments).
6. Run "Test Connection" and confirm the returned Business Central version and company name match expectations.

2.4 Configuring SmartFlows BC-01 – BC-04

Once both connectors report Connected, **Smart**Flows are enabled in dependency order. BC-01 is the foundation flow and must go live first; BC-02 depends on BC-01. BC-03 and BC-04 can be configured and deployed in parallel once BC-01 is validated.

SmartFlow	Direction	Depends On	Purpose
BC-01 — Master Data Sync	Creatio ↔ Business Central	—	Customers, vendors, and contacts. The foundation flow all others depend on.
BC-02 — Sales & Financial Sync	Creatio → Business Central → Creatio	BC-01	Sales orders, invoices, and payment status.
BC-03 — Inventory & Item Sync	Business Central → Creatio	BC-01	Item catalog and multi-location inventory availability.
BC-04 — Purchasing & Production Sync	Creatio ↔ Business Central	BC-01	Purchase orders, Bill of Materials, and production order status.

Each **Smart**Flow is enabled from the Hub's **Smart**Flows panel by selecting the flow, confirming its trigger set (see Part 5, Section 5.4), and reviewing its default field mappings (Part 6) before activating it in the target environment. Always activate a new **Smart**Flow in Sandbox first and validate with real (non-production) records before promoting to Production.

2.5 Sync Registry & Conflict-Resolution Rules

Before activating BC-01, set the conflict-resolution policy that governs what happens when the same record changes in both Creatio and Business Central near-simultaneously. Two configurable models are supported:

- Source-of-truth by field — e.g., Business Central is always authoritative for payment terms; Creatio is always authoritative for contact preferences.
- Source-of-truth by system — one system wins for all fields on a given entity type, with exceptions defined per field.

Conflicts that fall outside the configured rule set are not auto-resolved. They are flagged in IWSyncRegistry for manual review rather than silently applied — see Part 9, Section 9.3 for design guidance and Part 7 for how to review flagged conflicts.

2.6 Testing the Connection End-to-End

- ☐ Create a test customer in Creatio sandbox; confirm it appears as a Customer Card in Business Central sandbox within the expected sync latency (target: under 5 seconds).
- ☐ Update the same customer's address in Business Central; confirm the update is reflected back in Creatio.
- ☐ Review IWSyncLog for both events; confirm status = synced with no errors.
- ☐ Deliberately trigger a conflict (edit the same field in both systems within the sync window) and confirm the configured conflict-resolution rule behaves as expected.
- ☐ Confirm no duplicate customer record was created — validates L1 entity matching.

PART 3

Business Central Guide

Business Central–specific setup: API access, permissions, and deployment type

3.1 Supported Business Central Deployment Types

The **Smart**Integration Hub supports three Business Central deployment models. Confirm which one the customer runs before starting connector configuration (Part 2, Section 2.3) — the connection method and prerequisites differ meaningfully between them.

Deployment	Connection Method	Notes
Business Central Online (SaaS)	OData v4 API · Power Platform connectors	Preferred deployment. Supports Microsoft Copilot and Power BI out of the box. Fastest to provision.
Business Central On-Premises	OData API · Web Services (SOAP)	Requires an on-premises web service tier reachable by the **Inter**Weave host. See Section 3.6.
Business Central with Power Platform	Dataverse virtual tables · Power Automate	For customers standardizing on the Microsoft Power Platform ecosystem.

3.2 Azure AD App Registration & OAuth 2.0 Setup

ENGINEERING INPUT NEEDED

Needs verification/screenshots from **Inter**Weave engineering against the current Business Central Online API version: exact Azure AD app registration steps, required API permissions/scopes (e.g., Dynamics 365 Business Central delegated/application permissions), redirect URI, and client secret rotation policy.

1. In the Azure Portal, register a new application under the customer's Azure AD tenant (or use an existing integration app registration if the customer has one).
2. Add the Business Central API permission and grant admin consent.
3. Generate a client secret and record its expiration date.
4. Note the Tenant ID, Client ID, and Client Secret for entry into the Hub's Business Central connector screen (Part 2, Section 2.3).
5. Confirm the integration user or service principal has been assigned the permission set defined in Section 3.4.

CAUTION

Client secrets have an expiration date in Azure AD. Track rotation on the customer's calendar — an expired secret is one of the most common causes of a Business Central connector showing “Not Connected” post-go-live. See Part 8, Section 8.1 for recommended ownership.

3.3 OData API v4 Configuration

ENGINEERING INPUT NEEDED

Needs the current list of Odata v4 API pages/endpoints the Hub actually calls (standard Business Central API pages vs. any **Inter**Weave custom API extension), and whether a Business Central extension/app must be installed in the customer's environment.

At a conceptual level, the Hub reads and writes Business Central data through the standard Odata v4 API surface — Customers, Vendors, Items, Sales Orders, Purchase Orders, and related entities — rather than direct database access. This is what allows the integration to work without schema changes to Business Central.

3.4 Business Central Permission Sets Required

ENGINEERING INPUT NEEDED

Needs the exact permission set name(s) and object-level permissions (Read/Insert/Modify/Delete by table) that the integration user must be assigned. Table below is structural — confirm before use.

Object Area	Minimum Access Needed
Customers / Vendors / Contacts	Read, Insert, Modify
Sales Orders / Invoices / Credit Memos	Read, Insert, Modify
Purchase Orders	Read, Insert, Modify
Items / Inventory	Read
Bill of Materials / Production Orders	Read
Chart of Accounts / General Ledger	Read

3.5 Supported Business Central Objects & Entities

The following Business Central object areas are supported by the standard BC-01–BC-04 **Smart**Flow set:

Category	Objects
Customer & Financial Data	Customers, Vendors, Contacts, Chart of Accounts / General Ledger, Payment terms & status
Sales & Purchasing	Sales Orders, Quotes/Opportunities, Invoices, Purchase Orders, Credit Memos
Inventory & Manufacturing	Items / Product Catalog, Multi-location Inventory Levels, Bill of Materials (BOM), Production Orders, Equipment / Resale Items

3.6 On-Premises Web Service Tier Setup

ENGINEERING INPUT NEEDED

Needs **Inter**Weave engineering to confirm the exact network path required for on-prem Business Central: whether **Inter**Weave connects directly to a customer-exposed web service tier, requires a VPN/site-to-site tunnel, or requires a lightweight on-prem agent. This materially affects the customer's IT security review and should not be left ambiguous in partner-facing material.

Business Central On-Premises customers must expose a web service tier endpoint that is reachable by the **Inter**Weave Hub over HTTPS. Coordinate with the customer's IT/network team early — this is typically the longest lead-time item in an on-premises engagement and should be flagged during the discovery call (see Part 9, Section 9.2).

3.7 Power Platform / Dataverse Integration Notes

For customers standardizing on the Microsoft Power Platform, the Hub can integrate through Dataverse virtual tables and Power Automate rather than calling the Business Central API directly. This path is typically chosen when the customer already has significant Power Platform investment (existing Power Automate flows, Power BI reporting on Dataverse) and wants the integration to participate in that ecosystem rather than sit alongside it.

ENGINEERING INPUT NEEDED

Needs a real worked example of the Dataverse virtual table connection path from **Inter**Weave engineering, including any licensing implications (Power Apps/Power Automate premium connector requirements) that should be flagged to the customer during scoping.

PART 4

Creatio Guide

Creatio–specific setup: API access, entities, and permissions

4.1 Supported Creatio Editions

ENGINEERING INPUT NEEDED

Confirm which Creatio editions/products (e.g., Sales Creatio, Studio Creatio, on-prem vs. cloud) and version floor are officially supported before publishing. This proposal-derived guide assumes Creatio CRM generally; edition-specific gaps should be documented here.

4.2 Creatio REST API Prerequisites

ENGINEERING INPUT NEEDED

Needs the exact steps from **Inter**Weave engineering: how the integration user's OAuth client is registered in Creatio, which REST API collection/version is targeted, and any Creatio marketplace app/package that must be installed to support webhook delivery.

1. Confirm the Creatio REST API is enabled for the target environment (may require a system setting change by a Creatio administrator).
2. Create a dedicated integration user (do not reuse a named employee's login).
3. Register an OAuth 2.0 client for the integration user, or generate API credentials per the customer's Creatio edition.
4. Assign the integration user the security role defined in Section 4.5.
5. Record the environment base URL and credentials for entry into the Hub's Creatio connector screen (Part 2, Section 2.2).

4.3 Webhook & Event Configuration

SmartFlow triggers originating in Creatio (see Part 5, Section 5.4) can run in either event-driven (webhook) or polling mode. Event-driven mode gives the sub-5-second sync latency the platform targets; polling mode is a fallback when webhook delivery isn't feasible in the customer's network configuration.

ENGINEERING INPUT NEEDED

Needs the actual Creatio business-process or webhook configuration steps used to fire events on Account/Contact/Opportunity/Order changes toward the Hub's inbound endpoint. Structural outline only below.

1. Identify the Creatio business processes or object events that should trigger a sync (Account created/updated, Opportunity won, etc. — see Part 5, Section 5.4 for the full trigger list).
2. Configure a webhook (or Creatio business process with an outbound HTTP call) pointed at the Hub's inbound event endpoint for this customer's instance.
3. Confirm the payload includes the record's unique identifier so the Hub's L1 entity-match logic can resolve it against IWSyncRegistry.
4. Test by creating a record in Creatio sandbox and confirming the event appears in IWSyncLog within a few seconds.

4.4 Entity & Section Mapping in Creatio

The following Creatio sections map to Business Central objects through the Hub's L1/L2/L3 pipeline. Full field-level mapping detail is in Part 6.

Creatio Entity	Business Central Object	Direction	SmartFlow
Account	Customer Card / Vendor Card	Creatio ↔ Business Central	BC-01
Contact	Contact Card	Creatio ↔ Business Central	BC-01
Opportunity / Order	Sales Order / Invoice	Creatio → Business Central	BC-02
Product / Price List Item	Item Card	Business Central → Creatio	BC-03
Purchase Request	Purchase Order	Creatio → Business Central	BC-04
Production / Project Milestone	Production Order	Business Central → Creatio	BC-04

4.5 Permissions & Security Roles

ENGINEERING INPUT NEEDED

Needs the exact Creatio operation permissions (section-level read/write, business process run rights) required by the integration user's security role. Table below is structural.

Section	Minimum Access Needed
Accounts / Contacts	Read, Edit, Add
Opportunities / Orders	Read, Edit, Add
Products / Price Lists	Read
Purchase Requests (if applicable custom section)	Read, Edit, Add

NOTE

Use a dedicated integration user with the narrowest role that satisfies the table above, rather than an administrator account. This keeps IWSyncLog attribution clean and limits blast radius if credentials are ever compromised — see Part 9, Section 9.5.

PART 5

SmartFlow **Development Guide**

*Building, customizing, or extending a **Smart**Flow beyond the standard BC-01–BC-04 set*

5.1 **Smart**Flow **Architecture**

A **Smart**Flow is the Hub's unit of event-driven orchestration. Each **Smart**Flow owns one direction (or bi-directional pair) of synchronization between a defined set of Creatio and Business Central entities, and is responsible for retry behavior, dead-letter handling, and sequencing when multiple related events arrive close together (for example, an Account update followed immediately by a new Contact on that Account).

Capability	Description
Retry	Transient failures (timeouts, rate limits) are retried automatically on a backoff schedule before being flagged as an error in IWSyncLog.
Dead-letter handling	Events that fail permanently (e.g., a target record was deleted) are moved to a dead-letter queue for manual review rather than dropped silently.
Sequencing	Related events are processed in a defined order so a dependent record (e.g., a Sales Order) is never written before its parent (e.g., the Customer) exists in the target system.

5.2 **Flow**Copilot: **Natural-Language Flow Configuration**

FlowCopilot is the Hub's natural-language assistant for configuring **Smart**Flows and sync rules. Rather than editing raw mapping configuration, a consultant can describe the desired behavior in plain language — for example, "sync the customer's credit limit from Business Central to Creatio but never write it back from Creatio" — and **Flow**Copilot proposes the corresponding field mapping and directionality for review before it's applied.

ENGINEERING INPUT NEEDED

Needs a real worked example and screenshots from **Inter**Weave engineering: what FlowCopilot's interface looks like, what it can and cannot configure unassisted, and how a consultant reviews/approves its proposed changes before they go live.

CAUTION

FlowCopilot proposes configuration; it does not apply changes to a production environment without explicit consultant confirmation. Always review a **Flow**Copilot-generated mapping against the entity mapping reference in Part 6 before approving it in Sandbox, and never approve directly in Production.

5.3 Building a Custom SmartFlow

Most engagements only need the standard BC-01–BC-04 **Smart**Flows. A custom **Smart**Flow is appropriate when a customer needs to sync an entity or object not covered by the standard set (for example, a custom Creatio section, or a Business Central extension table).

ENGINEERING INPUT NEEDED

Needs the real custom **Smart**Flow builder walkthrough from **Inter**Weave engineering. Structural outline only below — verify every step and screen name against the current platform.

1. Define the source entity and target entity, and the direction of sync (one-way or bi-directional).
2. Define the trigger(s) that should fire the flow (see Section 5.4).

3. Define or reuse an L1 entity-match rule so the flow doesn't create duplicates.
4. Define the L2 field transformation rules (see Part 6).
5. Define the L3 orchestration behavior: retry policy, sequencing dependencies on other flows, and conflict-resolution rule.
6. Name and document the flow following the BC-0X naming convention, or a customer-specific prefix if it's a one-off extension.
7. Test thoroughly in Sandbox (Section 5.5) before requesting production deployment (Section 5.6).

Custom **Smart**Flow scoping and pricing follow the "Additional sync **Smart**Flow" line item in the standard **Inter**Weave pricing model (design, build, test, and documentation included per flow).

5.4 Trigger Types & Event Sources

SmartFlows are triggered by events originating in either Creatio or Business Central. Both directions are monitored in real time.

Creatio / CRM Triggers	Business Central / System Triggers
Account created or updated	Customer or Vendor created / changed
Contact added or updated	Sales Order or Invoice posted
Opportunity won / quote approved	Purchase Order created or received
Service or project milestone reached	Item or inventory level changed
Order requested from CRM	Production Order status changed

5.5 Testing & Sandbox Validation

- ☐ Run each trigger scenario individually in Sandbox and confirm the correct downstream write occurs.
- ☐ Run a bulk/batch scenario (e.g., 50+ records) to confirm sequencing and retry behavior hold up under volume.
- ☐ Deliberately break a scenario (invalid data, missing required field) and confirm it fails gracefully into IWSyncLog rather than partially writing to the target system — see Part 9, Section 9.1's related principle on master-data-first sequencing.
- ☐ Confirm the flow respects the conflict-resolution policy configured in Part 2, Section 2.5.

5.6 Deploying a **Smart**Flow to Production

> **ENGINEERING INPUT NEEDED**
>
> Needs **Inter**Weave's actual promotion process from Sandbox to Production — is it a one-click promotion inside the Hub, or a change-request/approval workflow? This affects how Net@Work should describe go-live timing to their clients.

As a general principle: never enable a new or modified **Smart**Flow directly in Production. Promote from a validated Sandbox configuration, and schedule production activation during a low-activity window with the customer's stakeholders informed — see Part 10, Section 10.3 for change-window guidance.

PART 6

Field Mapping Guide

Defining or changing how fields and entities map between Creatio and Business Central

6.1 Mapping Model Overview

Every mapped field passes through the same three-layer model used throughout the platform:

Layer	Responsibility	Example
L1 — Entity Match	Identify whether a record already exists in the target system before writing.	Matching a Creatio Account to an existing Business Central Customer by tax ID.
L2 — Transformation	Convert the value into the target system's expected format.	Converting a Creatio currency code to Business Central's currency and exchange rate fields.
L3 — Orchestration	Sequence and write the transformed value, applying conflict rules.	Writing the transformed Customer Card only after its parent record dependencies are resolved.

After transformation, the Hub writes a complete, mapped, and traceable record to the receiving system — neither Creatio nor Business Central needs to interpret raw data from the other.

Data Elements Carried on Every Synced Record

Identification	Value Composition	Sync Status & Control
Customer / Vendor ID	Line items and quantities	Sync status per record (synced / pending / error)
Contact ID	Unit price / discount / tax	Last successful sync timestamp
Item / SKU ID	Currency and exchange rate	End-to-end traceability by event
Document number (SO / PO / Invoice)	Order / invoice totals	Sync error flag
Location / warehouse ID	Inventory on-hand & available-to-promise	Reference to IWSyncRegistry

6.2 Standard Entity Mappings

These are the default mappings shipped with the BC-01–BC-04 **Smart**Flow set. Use this table as the starting point for any new implementation before considering customer-specific customization.

Creatio Entity	Integration Object	Business Central Object	Direction	SmartFlow
Account	Customer / Vendor Record	Customer Card / Vendor Card	Creatio ↔ BC	BC-01
Contact	Contact Record	Contact Card	Creatio ↔ BC	BC-01
Opportunity / Order	Sales Document	Sales Order / Invoice	Creatio → BC	BC-02
Product / Price List Item	Item Record	Item Card	BC → Creatio	BC-03
Purchase Request	Purchase Document	Purchase Order	Creatio → BC	BC-04
Production / Project Milestone	Production Status	Production Order	BC → Creatio	BC-04

6.3 Custom Field Mapping Configuration

ENGINEERING INPUT NEEDED

Needs the real custom field-mapping UI walkthrough from **Inter**Weave engineering — how a consultant adds a field pair beyond the standard set, whether it's done via **Flow**Copilot natural-language input or a manual mapping grid, and how mapping changes are versioned.

Custom field mapping beyond the standard scope follows the "Custom field mapping" pricing line item (L1–L2 configuration plus documentation, per mapping). Document every custom mapping in the customer's environment-specific addendum to this guide so future consultants inherit the context.

6.4 Currency, Tax & Unit-of-Measure Transformation Rules

Field-level transformation rules convert currency, tax codes, and units of measure at the L2 layer before any write reaches the target system. Mismatches are logged, not silently dropped — a transformation that cannot be resolved (for example, an unrecognized currency code) causes the record to be held in IWSyncRegistry as "error" rather than written with a guessed or default value.

Data Type	Transformation Behavior
Currency	Converted using the exchange rate current in the target system at time of write; original and converted values both retained for audit.
Tax codes	Mapped via a configurable tax-code crosswalk between Creatio and Business Central; unmapped codes are held for review rather than defaulted.
Units of measure	Converted using Business Central's unit-of-measure conversion table; multi-location rollups respect each location's base UoM.
Addresses	Reformatted to the target system's expected address structure (line breaks, region/state codes).

6.5 Mapping Validation & Change Management

Field mapping changes affect every future sync event, so treat them as a change-managed configuration, not a one-off edit:

- ☐ Test every mapping change in Sandbox against a representative sample of real (non-production) records before promoting.
- ☐ Document the change, its owner, and its rationale in the customer's environment-specific mapping addendum.
- ☐ Confirm the change doesn't conflict with an existing conflict-resolution rule (Part 2, Section 2.5).
- ☐ Communicate the change to the customer's CRM and Finance stakeholders before promoting to Production, per the change-window guidance in Part 10, Section 10.3.

PART 7

Troubleshooting Guide

Diagnosing a sync error, reviewing logs, and resolving a data mismatch

7.1 IWSyncRegistry Reference

IWSyncRegistry is the Hub's system-of-record for the sync state of every entity under management. It answers the question "what is the current sync status of this specific record?" — as opposed to IWSyncLog, which answers "what happened, and when?" (Section 7.2).

Field	Description
Entity Type	The mapped entity (Customer, Sales Order, Item, etc.).
Source / Target ID	The record's unique identifier in Creatio and in Business Central.
Sync Status	synced / pending / error.
Last Successful Sync Timestamp	The most recent time this record was confirmed written to the target system.
Match Keys	The tax ID, email, or external ID values used by L1 entity matching to resolve this record.
Conflict Flag	Set when a bi-directional edit could not be auto-resolved by the configured conflict rule (Part 2, Section 2.5).

ENGINEERING INPUT NEEDED

Confirm exact field names, the IWSyncRegistry UI location within the Hub, and whether records can be manually re-queued for sync from this screen — needed from **Inter**Weave engineering.

7.2 IWSyncLog Reference

IWSyncLog is the full event-level audit trail. Every sync attempt — successful, retried, or failed — is written here with a timestamp and result, giving end-to-end traceability by event rather than just by record.

Field	Description
Event ID	Unique identifier for this specific sync attempt.
Triggering Event	The originating Creatio or Business Central event (see Part 5, Section 5.4).
SmartFlow	Which flow (BC-01–BC-04 or custom) processed the event.
Result	Success / Retried / Failed / Dead-lettered.
Error Code & Message	Populated on Failed or Dead-lettered results — see Section 7.3.
Timestamp	When the event was received and when it was resolved.

7.3 Common Sync Errors & Resolutions

The following issue categories are the ones the platform is explicitly designed to defend against (see also Part 9, Section 9.6 for related implementation pitfalls). Exact on-screen error codes need to be confirmed with engineering; the underlying causes and mitigations below are drawn from the platform's documented risk controls.

Issue	Cause	Platform Behavior / Resolution
Partial write to Business Central	Transmission failure mid-write (e.g., network drop during an order + line items write)	No write is ever confirmed without the complete record. The event stays in the retry queue; Business Central never receives partial data. Review IWSyncLog for the retry history.
Duplicate customer or vendor record	L1 entity match couldn't confidently resolve the incoming record to an existing one	Suspected duplicates are flagged for manual review in IWSyncRegistry rather than auto-merged. Review and manually link or create as appropriate.
Conflicting bi-directional edits	Same record changed in both systems inside the sync window	Resolved automatically per the configured conflict rule (Part 2, Section 2.5); anything outside the rule set is flagged to the integration team.
Currency / tax / unit-of-measure mismatch	Value doesn't map cleanly per the L2 transformation rules (Part 6, Section 6.4)	Logged, not silently dropped. Update the relevant crosswalk/transformation rule and re-queue the record.
Inventory sync failure or delay (BC-03)	Business Central inventory read did not complete or timed out	Existing CRM inventory values are not overwritten by an unconfirmed read. BC-03 supports on-demand re-sync of any location — see Section 7.4.

7.4 Diagnostic Tools & Log Review Workflow

> **ENGINEERING INPUT NEEDED**
>
> Needs the actual diagnostic tooling walkthrough from **Inter**Weave engineering: where the on-demand re-sync control lives, whether there's a CLI or only a UI, and how to pull a raw log export for a support escalation.

1. Start in IWSyncRegistry: locate the affected record and confirm its current status and last successful sync timestamp.
2. Cross-reference IWSyncLog for that record's event history — look for retries and the specific error code/message on the failed attempt.
3. Match the error against Section 7.3. If the cause is a mapping or transformation issue, resolve it in Part 6 and re-queue the record.
4. If the cause is a connectivity or permission issue, revisit Part 2 (Connector Configuration) or the relevant system-specific part (Part 3 for Business Central, Part 4 for Creatio).
5. If the record still fails after remediation, escalate per Section 7.5.

7.5 Escalation Path to **Inter**Weave Support

Support tier and response expectations depend on the customer's **Inter**Weave subscription level:

Tier	Support Model	Platform Uptime SLA
Professional	Business hours	99.5%
Enterprise	Priority support + dedicated CSM	99.9%
Ultimate	24/7 enterprise support	99.95%

Before escalating, gather: the affected record's IWSyncRegistry status, the relevant IWSyncLog event ID(s), the **Smart**Flow involved, and a summary of remediation steps already attempted from Section 7.4. This significantly shortens time-to-resolution on **Inter**Weave's side.

> **ENGINEERING INPUT NEEDED**
>
> Confirm the current partner escalation channel (email alias, portal ticket type, or phone line) and target response times per tier with **Inter**Weave support leadership.

PART 8

Administration Guide

Ongoing administration: users, monitoring, environments, and reporting

8.1 User & Role Management

ENGINEERING INPUT NEEDED

Needs the Hub's actual admin/consultant/read-only role definitions and the screen used to manage them, from **Inter**Weave engineering.

As a baseline principle, assign the narrowest role that lets each person do their job: administrators who can change connector credentials and mapping configuration should be a short, named list; support and consulting staff who only need to review sync status and logs should have read-only access. Track credential ownership (Azure AD app secrets, Creatio integration user) explicitly — see Part 3, Section 3.2 and Part 4, Section 4.2.

8.2 Monitoring & Alerting Configuration

The Hub provides 24/7 monitoring, alerting, and error management across all active **Smart**Flows. Configure alert routing during initial setup so sync errors are surfaced to the right owner rather than only discovered during a manual log review.

ENGINEERING INPUT NEEDED

Needs the real alerting configuration screen and supported channels (email, Slack/Teams webhook, PagerDuty, etc.) from **Inter**Weave engineering.

- Set alert thresholds for sustained sync errors (e.g., more than N failed events in a rolling window).
- Route Business Central connectivity alerts to the customer's IT/network owner as well as the **Inter**Weave support contact.
- Route data-conflict alerts (Part 7, Section 7.3) to the business owner best positioned to resolve them (Finance for payment terms, Sales for account ownership, etc.).

8.3 Sync Status Dashboard & Reports

The Hub surfaces a set of operational reports directly in Creatio, giving Sales, Finance, and Operations a single view of the customer relationship without direct access to Business Central.

Sync & Control Reports	Customer 360 Reports	Inventory & Fulfillment Reports
Sync status dashboard (by object type)	Order and invoice history by account	Open purchase / production orders by account
Records pending or in error	Account balance and payment status	Real-time inventory availability
Last sync timestamp by record	—	Items on backorder / Production order status by customer

8.4 Environment Management

Maintain a clear separation between Sandbox and Production environments throughout the engagement (see Part 1, Section 1.5). For customers with multiple Business Central companies, each additional company or sandbox environment is provisioned as a distinct connection within the same Hub instance.

- Label every environment clearly (Sandbox / Production, and company name for multi-company customers) to prevent accidental cross-environment configuration changes.
- Never point a Production **Smart**Flow at a Sandbox Business Central company, or vice versa.
- Additional Business Central companies or sandbox environments beyond the base scope follow the standard "Additional Business Central company / environment" pricing line item.

8.5 Backup, Retention & Data Governance

ENGINEERING INPUT NEEDED

Needs **Inter**Weave's actual IWSyncLog retention period, backup policy, and data-residency options (US/EU) from engineering and legal/compliance before this is stated to a partner.

PII and financial fields flagged in IWSyncRegistry are encrypted in the transformation layer and are not stored in plain text in integration logs. All data in transit between Creatio, the Hub, and Business Central uses TLS 1.3. See Part 9, Section 9.5 for related best-practice guidance.

8.6 Platform Uptime SLA & Support Tiers

Tier	Platform Uptime SLA	Support Model
Professional	99.5%	Business hours
Enterprise	99.9%	Priority support + dedicated CSM
Ultimate	99.95%	24/7 enterprise support

Confirm the customer's contracted tier during onboarding and record it in the environment's administration notes — it determines both the expected uptime and the correct escalation path described in Part 7, Section 7.5.

PART 9

Best Practices Guide

Planning an implementation approach and reviewing design decisions

9.1 Master-Data-Sync-First Principle

BC-01 (Master Data Sync) is the foundation flow, and every other **Smart**Flow depends on it. Customers, vendors, and contacts must be reliably synchronized and de-duplicated before sales, inventory, or purchasing data is layered on top — a Sales Order synced against an unresolved or duplicate Customer record creates exactly the kind of downstream mismatch the platform is designed to prevent. Never sequence BC-02, BC-03, or BC-04 ahead of a validated BC-01.

9.2 Phased Rollout Strategy

The standard implementation follows a three-phase, eight-week structure. Use it as the default plan and adjust scope, not sequence, for customer-specific timelines.

Phase	Focus	Weeks	Key Deliverables
Phase 1	Foundation: Master Data Sync	1–3	API credentials validated; IWSyncRegistry/IWSyncLog configured; BC-01 deployed and tested in Sandbox with real records; validation workshop with CRM and Finance stakeholders.
Phase 2	Sales, Financial & Inventory Sync	4–6	BC-02 and BC-03 configured and validated; full UAT with Sales and Finance teams.
Phase 3	Purchasing, Production & Go-Live	7–8	BC-04 configured and tested; reports configured in Creatio; full production go-live for all **Smart**Flows; 30-day hypercare begins (Part 10, Section 10.4).

Run the Section 1.3 pre-installation checklist and the discovery-call agenda from the **Inter**Weave proposal template before Week 1 begins — the single biggest driver of an on-time Phase 1 is having Business Central and Creatio access, and stakeholder availability, confirmed before kickoff.

9.3 Conflict-Resolution Design Patterns

Decide the conflict-resolution model (Part 2, Section 2.5) during discovery, not during Phase 1 build — retrofitting a conflict rule after real data has synced under a different assumption is disruptive. Two patterns cover most engagements:

- Financial fields (payment terms, credit limits, pricing) — Business Central as source of truth, since Finance owns these values and Sales should see, not set, them.
- Relationship and contact-preference fields (communication preferences, account ownership) — Creatio as source of truth, since Sales/Service own the relationship.

Whatever the pattern, keep the rule set narrow and explicit. Anything outside the defined rules should be flagged for manual review (Part 7, Section 7.3) rather than silently resolved by a default — a silent default is how a real financial value gets quietly overwritten by a stale CRM edit.

9.4 Performance & Sync Latency Optimization

The platform targets sub-5-second sync latency for standard record types under normal load. If a customer's implementation is consistently slower than that target, check these areas first, in order:

1. Trigger mode — confirm event-driven (webhook) triggers are configured rather than polling (Part 4, Section 4.3); polling introduces latency by design.

2. Business Central deployment type — On-Premises deployments depend on the responsiveness of the customer's web service tier (Part 3, Section 3.6), which is outside the Hub's control.
3. Batch volume — a large bulk import can temporarily queue behind normal transactional sync; schedule bulk loads during low-activity windows (Part 10, Section 10.3).
4. Custom **Smart**Flow complexity — a custom flow with many chained L1/L2/L3 steps (Part 5, Section 5.3) will naturally take longer than a standard BC-0X flow.

9.5 Security & PII Handling Best Practices

- Use dedicated, narrowly-scoped integration users in both Creatio and Business Central (Part 3, Section 3.4; Part 4, Section 4.5) — never a named employee's personal login.
- All data in transit uses TLS 1.3 by default; do not disable or downgrade this for any customer network configuration.
- PII and financial fields flagged in IWSyncRegistry are encrypted in the transformation layer and excluded from integration logs — do not add custom logging that captures raw field values for debugging in a production environment.
- Track Azure AD client secret expiration on a shared calendar owned by the implementation team, not an individual (Part 3, Section 3.2).

9.6 Common Implementation Pitfalls

ENGINEERING INPUT NEEDED

This list is informed by the platform's documented risk-mitigation controls; validate and expand it against **Inter**Weave's actual field experience across prior partner implementations before publishing as authoritative guidance.

Pitfall	Why It Happens	How to Avoid It
Activating BC-02/03/04 before BC-01 is validated	Eagerness to show sales/inventory value early	Hold to the dependency order in Section 9.1 and Part 2, Section 2.4.
No conflict-resolution rule defined before go-live	Treated as a "configure later" item	Decide the pattern during discovery per Section 9.3, not during build.
Reusing a personal login as the integration user	Faster to set up during a rushed kickoff	Always provision a dedicated integration user per Sections 3.4 / 4.5, even under time pressure.
Skipping Sandbox validation for a mapping change	Change seems "too small to matter"	Every mapping change goes through Sandbox validation per Part 6, Section 6.5, regardless of size.

PART 10

Operations Runbook

Running steady-state operations after go-live, including incident response

10.1 Daily Operations Checklist

ENGINEERING INPUT NEEDED

Structural checklist below; validate cadence and thresholds against **Inter**Weave's actual operational guidance for live customers.

- ☐ Review the sync status dashboard (Part 8, Section 8.3) for any records in "error" status older than the customer's agreed SLA window.
- ☐ Review IWSyncLog for any dead-lettered events from the prior 24 hours.
- ☐ Confirm both connectors (Creatio and Business Central) still show "Connected" — flag any credential expiration warnings (Part 3, Section 3.2).
- ☐ Spot-check the flagged-conflict queue (Part 2, Section 2.5) and route unresolved items to the correct business owner.

10.2 Incident Response Procedure

An "incident" in this context is a sync disruption serious enough to affect business operations — not an individual record error, which is handled through the normal troubleshooting workflow in Part 7.

1. Confirm scope: is this a single **Smart**Flow, a full connector outage (Creatio or Business Central), or a Hub-wide issue?
2. Check IWSyncLog and the connector status panel to establish when the disruption began and what changed immediately before it (a credential rotation, a Business Central update, a network change).
3. If the cause is a connector-level failure, stop the affected **Smart**Flow(s) rather than letting failed events accumulate in the retry queue indefinitely.
4. Notify the customer's designated contact per the severity and SLA tier in Part 8, Section 8.6, and escalate to **Inter**Weave support per Part 7, Section 7.5 if the cause isn't resolvable at the partner level.
5. Once resolved, reconcile: identify every record affected during the outage window via IWSyncLog and manually re-queue or verify each one rather than assuming the retry queue caught everything.
6. Document the incident, root cause, and resolution for the customer's operations record and for **Inter**Weave's platform reliability tracking.

CAUTION

Never manually edit a record in both Creatio and Business Central to "fix" a sync issue during an incident. This creates exactly the conflicting-edit scenario the platform is designed to prevent (Part 7, Section 7.3) and can make reconciliation after the incident significantly harder.

10.3 Planned Maintenance & Change Windows

Schedule the following activities during a defined low-activity change window, communicated to the customer's stakeholders in advance:

- Promoting a new or modified **Smart**Flow from Sandbox to Production (Part 5, Section 5.6).
- Field mapping changes (Part 6, Section 6.5).
- Bulk/batch data loads that could temporarily elevate sync volume (Part 9, Section 9.4).
- Azure AD client secret rotation (Part 3, Section 3.2) or Creatio integration user credential changes (Part 4, Section 4.2).

ENGINEERING INPUT NEEDED

Confirm **Inter**Weave's recommended change-window cadence and notice period with engineering/operations before stating a specific SLA to a partner.

10.4 Hypercare Support Model

Every implementation includes a 30-day hypercare period immediately following full production go-live (end of Phase 3, Part 9, Section 9.2). During hypercare:

- Sync activity and error rates are monitored more closely than steady-state, typically with daily rather than periodic review.
- The implementation consultant remains the primary point of contact rather than routing directly to standard support.
- Any issues found are prioritized for same-engagement resolution rather than queued as standard support tickets.

At the end of hypercare, complete the handoff checklist in Section 10.5 before transitioning the customer to steady-state support (Part 7, Section 7.5).

10.5 Handoff Checklist: Implementation to Steady-State Support

- ☐ All four standard **Smart**Flows (or the customer's contracted subset) are live in Production with zero unresolved errors in IWSyncRegistry.
- ☐ Conflict-resolution rules, field mappings, and any custom **Smart**Flows are documented in the customer's environment-specific addendum.
- ☐ Customer's designated administrator(s) have completed a walkthrough of the sync status dashboard and reports (Part 8, Section 8.3).
- ☐ Credential ownership and rotation calendar (Azure AD secrets, Creatio integration user) is assigned and documented.
- ☐ Customer's support tier and escalation path (Part 7, Section 7.5) is confirmed and communicated.
- ☐ Runbook and training materials delivered to the customer per the proposal's Phase 3 deliverables.
- ☐ Formal handoff meeting held with the customer, transitioning primary contact from the implementation consultant to standard support.

PART 11

Consultant Certification Manual

*Onboarding and certifying new consultants on the **Inter**Weave platform*

11.1 **Inter**Weave **Smart**Tracks Certification Overview

SmartTracks is **Inter**Weave's guided implementation and enablement methodology, extended here into a certification program for partner consultants. The goal is straightforward: a Net@Work consultant who completes **Smart**Tracks certification should be able to independently install, configure, and support a standard Creatio ↔ Business Central integration using this guide as their reference, escalating to **Inter**Weave only for platform-level issues (Part 7, Section 7.5) rather than basic configuration questions.

> **ENGINEERING INPUT NEEDED**
>
> **Smart**Tracks certification content below is a proposed structure, not a finalized curriculum. **Inter**Weave's enablement/training team should own the final module content, assessment questions, and pass criteria.

11.2 Certification Tracks & Prerequisites

Track	Intended For	Prerequisite
Implementation Consultant	Consultants who will install, configure, and go live on customer engagements	Completion of Part 1–Part 6 of this guide and hands-on Sandbox access
Support Engineer	Staff supporting live customers post-go-live	Completion of Part 7, Part 8, and Part 10 of this guide
Solution Architect	Staff scoping custom **Smart**Flows and complex deployments	Implementation Consultant certification plus Part 5 and Part 9 in depth

11.3 Module 1 — Platform Fundamentals

Covers the **Smart**Integration Hub architecture, the L1/L2/L3 model, **Smart**Flows, IWSyncRegistry, and IWSyncLog (this guide's Part 2, Section 2.1 and Part 6, Section 6.1). A consultant completing this module should be able to explain, without reference material, how a single record moves from a Creatio event to a written Business Central record.

11.4 Module 2 — Connector Installation & Configuration

Hands-on: provision a Hub instance, connect Creatio and Business Central sandboxes, and validate the connection end-to-end (this guide's Part 1 and Part 2). Assessed by successfully completing the Section 2.6 end-to-end connection test in a live sandbox.

11.5 Module 3 — **Smart**Flow Development

Covers activating the standard BC-01–BC-04 **Smart**Flows in dependency order, and an introduction to building a custom **Smart**Flow with FlowCopilot (this guide's Part 5). Assessed by completing the Section 5.5 sandbox validation checklist against a working BC-01 deployment.

11.6 Module 4 — Troubleshooting & Support

Covers the diagnostic workflow, common error categories, and escalation path (this guide's Part 7), plus steady-state operations and incident response (Part 10). Assessed by correctly diagnosing and resolving a set of seeded sync errors in a training sandbox.

11.7 Certification Exam & Renewal

ENGINEERING INPUT NEEDED

Needs **Inter**Weave enablement team to define: exam format, passing score, renewal cadence (e.g., annual re-certification tied to major platform releases), and whether certification is tracked per-individual or per-partner-organization.

11.8 Partner Enablement Resources

Resource	Where to Find It
Partner Portal — sandbox provisioning, documentation, certification tracking	partner.interweave.biz
Sales & partnership inquiries	sales@interweave.biz
Phone (USA)	(203) 274-5226
Phone (Canada)	1-800-671-8692
Primary partner contact	Bruce Magown, CEO & Founder — bmagown@interweave.biz

APPENDIX A

Glossary of Terms

Term	Definition
SmartIntegration **Hub**	The central integration engine and enterprise control plane connecting Creatio and Business Central. Hub-and-spoke architecture; single source of truth for sync state.
SmartAgents	**Inter**Weave's AI automation layer — described as "digital operators, not digital assistants." Operate on a continuous Sense → Decide → Act loop, used here for anomaly detection (duplicate records, stalled syncs, mismatches).
SmartFlows	Adaptive, AI-enhanced workflows that orchestrate synchronization between Creatio and Business Central. Defined by Intent-Based Design, Dynamic Execution, and Self-Healing Behavior.
FlowCopilot	The natural-language, LLM-assisted flow builder used to configure **Smart**Flows and field mappings in plain language.
SmartGovernance	**Inter**Weave's AI governance and compliance layer: Policy-Driven Execution, Permission-Aware Autonomy, Continuous Auditability, and Intelligent Exception Handling.
SmartTracks **Program**	**Inter**Weave's guided implementation methodology, extended in this guide into a partner consultant certification program (Part 11).
IWSyncRegistry	The system-of-record for the current sync status of every mapped entity (synced / pending / error), including match keys and conflict flags. See Part 7, Section 7.1.
IWSyncLog	The full event-level audit trail of every sync attempt, successful or not, with timestamp and result. See Part 7, Section 7.2.
L1 / L2 / L3	The three-layer processing model applied to every synced field: L1 Entity Match, L2 Transformation, L3 Orchestration. See Part 2, Section 2.1 and Part 6, Section 6.1.
BC-01 – BC-04	The four standard **Smart**Flows: Master Data Sync, Sales & Financial Sync, Inventory & Item Sync, and Purchasing & Production Sync. See Part 2, Section 2.4.
Hypercare	The 30-day heightened-monitoring support period immediately following production go-live. See Part 10, Section 10.4.

APPENDIX B

Entity Mapping Quick Reference Card

A condensed, printable version of the full mapping detail in Part 6. Keep this page handy during Sandbox configuration work.

Creatio Entity	Integration Object	Business Central Object	Direction	SmartFlow
Account	Customer / Vendor Record	Customer Card / Vendor Card	Creatio ↔ BC	BC-01
Contact	Contact Record	Contact Card	Creatio ↔ BC	BC-01
Opportunity / Order	Sales Document	Sales Order / Invoice	Creatio → BC	BC-02
Product / Price List Item	Item Record	Item Card	BC → Creatio	BC-03
Purchase Request	Purchase Document	Purchase Order	Creatio → BC	BC-04
Production / Project Milestone	Production Status	Production Order	BC → Creatio	BC-04

Supported Business Central Object Categories

Category	Objects
Customer & Financial Data	Customers, Vendors, Contacts, Chart of Accounts / General Ledger, Payment terms & status
Sales & Purchasing	Sales Orders, Quotes/Opportunities, Invoices, Purchase Orders, Credit Memos
Inventory & Manufacturing	Items / Product Catalog, Multi-location Inventory Levels, Bill of Materials (BOM), Production Orders, Equipment / Resale Items

APPENDIX C

Error Code Reference

ENGINEERING INPUT NEEDED

InterWeave engineering must supply the authoritative list of IWSyncLog error codes, exact message text, and severity levels. The table below is a structural placeholder mapped to the issue categories in Part 7, Section 7.3 — do not treat the codes shown as real until confirmed.

Code (placeholder)	Category	Reference
ERR-SYNC-PARTIAL	Partial write to Business Central	Part 7, Section 7.3
ERR-SYNC-DUPLICATE	Duplicate customer or vendor record	Part 7, Section 7.3
ERR-SYNC-CONFLICT	Conflicting bi-directional edit outside rule set	Part 2, Section 2.5; Part 7, Section 7.3
ERR-SYNC-TRANSFORM	Currency / tax / unit-of-measure mismatch	Part 6, Section 6.4; Part 7, Section 7.3
ERR-SYNC-INVENTORY	Inventory sync failure or delay (BC-03)	Part 7, Section 7.3
ERR-AUTH-EXPIRED	Azure AD client secret or Creatio credential expired	Part 3, Section 3.2; Part 4, Section 4.2

APPENDIX D

Contact & Escalation Directory

Purpose	Contact
Primary partner contact	Bruce Magown, CEO & Founder — bmagown@interweave.biz
Sales & partnership inquiries	sales@interweave.biz
Phone (USA)	(203) 274-5226
Phone (Canada)	1-800-671-8692
Partner Portal	partner.interweave.biz
Product / solution overview	interweave.biz/ms-dynamics
Support escalation	Per contracted tier — see Part 7, Section 7.5 and Part 8, Section 8.6