Salesforce Non Profit Success Pack and QuickBooks Desktop Integration

We are connecting only with QuickBooks Desktop.

Overview:

DBSync for Salesforce Non Profit Success Pack (NPSP) & QuickBooks Desktop Integration is easy to use application. It integrates Salesforce NPSP Accounts / Contacts, Opportunity with QuickBooks Desktop Customers, Items, Invoice & Sales Receipt. DBSync provides a pre-built field-to-field mapping along with flexibility for more complex and dynamic mapping capability. DBSync also has an automatic online update. This enables DBSync customers to enjoy all the product updates and features with every new release.

Data Flow:

Data flow of unidirectional integration between Salesforce Non Profit Success Pack & QuickBooks Desktop is shown in the table below. The integration streamlines inserting a new record in QuickBooks Desktop.

Process Map:

Process Map of integration between Salesforce Non Profit Success Pack & QuickBooks Desktop is shown in the image below.

Pre-requisites for Integration:

- Integration of Salesforce to QuickBooks Desktop transaction is ushered when the **Generate** field in Salesforce Opportunity is selected with the required transaction.
- It is mandatory that SF Opportunity (to be integrated with QuickBooks Desktop Invoice) is associated with the respective **SF Account.** An d, it should also have **Product Name** in it, for DBSync to invoke integration.

DBSync package (QuickBooks Desktop Integration) Installation in Salesforce:

1. Get the following App from AppExchange for your Salesforce instance. https://login.salesforce.com/packaging/installPackage.apexp?p0=04t600000001j4f.
2. ***Note:*** *If you are installing into a sandbox, you must replace the initial portion of the URL with* http://test.salesforce.com.
3. Next, it will ask you for the **username** and **password** of the Salesforce instance where you would like to install DBSync. Make sure that the **username** and **password** belong to a person that has **administrative privileges** to install the app.
4. You will see **Package Installation Details** of DBSync Package **DBSync: QuickBooks Desktop Integration (version 1.24)** along with Package Component. Click on **Continue** to proceed with installation. Follow the instructions to **Approve Package API Access, Choose Security Level** and complete the process of installation.
5. Now, assign **DBSync Page Layouts** for **Accounts, Contacts, Opportunity, Opportunity Products and Products** objects. Refer the following steps to assign DBSync Page layout to Accounts Object. Existing Page Layout will be replaced by DBSync Page Layout. Any custom fields available in the existing page layout should be moved to DBSync Page Layout if required.
6. Go to **Salesforce Setup**, **Customize**, **Accounts**, **Page Layouts**. This will show the list of available Page Layouts for Accounts Object. Click on **Page Layout Assignment**.
7. You will find the list of default Page Layouts assigned for every Salesforce Profile.
8. Click on **Edit Assignment** to proceed.
9. Click on the **Page Layout next to the required profile**. Account Page Layout is assigned to the System Administrator's profile. As a result, System Administrator's profile should be assigned to the DBSync Account page layout.
10. Select DBSync Account Layout from **Page Layout To Use** picklist. Page Layout will be changed from Account Layout to DBSync Account Layout. Click on **Save** to save the new page layout assignment.
11. Similarly assign DBSync Page Layout for the rest of the aforementioned Salesforce Objects - Contacts, Opportunity, Opportunity Products, and Products.

DBSync Profile Setup:

1. Go to www.mydbsync.com and register for a Free Trial.
2. Ensure that Source and Target Adapters are Salesforce & QuickBooks Desktop respectively.
3. When you have access to DBSync Account, ensure that **Salesforce Non-Profit Success Pack to QuickBooks Desktop: Unidirectional** template is included from the template library.

4. Save Salesforce credentials and QuickBooks Desktop location in your DBSync profile. Then, configure the QuickBooks web connector. Please refer to the wiki link below for detail steps. http://help.mydbsync.com/docs/display/dbsync/Configuring+DBSync+with+Quickbook+WebConnector.

Run Integration from QuickBooks Web Connector

1. Before running the integration, carefully consider the following points for the Integration of Standard DBSync Salesforce QuickBooks Desktop Bi-directional.
2. Integration of Salesforce to QuickBooks Desktop transaction is ushered when the Generate field in Salesforce Opportunity is selected with the required transaction.
3. It is mandatory that Salesforce Opportunity (to be integrated with QuickBooks Desktop Transaction) is associated with the respective Salesforce Account. And, it should also have Product name in it for DBSync to invoke integration.
4. The Primary Contact updated in Salesforce Opportunity will sync with QuickBooks Desktop Contacts.
5. Once you are done with the mappings, go to your QuickBooks Web Connector by clicking on **Start** > **Programs** > **QuickBooks** > **Web Connector.** Then, click on the password text box for profile ***dbsync2-NonProfitSalesforceQuickBooks Desktop:UniDirectional***.
6. Enter your ***DBSync password*** in the text box and hit ***Enter***. One Message Box will be displayed asking you "***Do you want to save this password***" - select ***Yes***. DBSync Password will be saved in the web connector.
7. Check the ***dbsync2-NonProfitSalesforceQuickBooks Desktop: UniDirectional*** checkbox and click on ***Update Selected.*** This will start the sync and the process will complete automatically. Auto-Run can also be used in Web Connector to run integration at regular intervals. For example, if you select 60 minutes, after every 60 minutes, integration will run by itself, provided Web Connector is open.