

Salesforce FieldService & QuickBooks Desktop Integration (Uni-directional)

We are connecting only with QuickBooks Desktop.

Introduction

DBSync for Salesforce FieldService & QuickBooks Desktop is an easy to use application. It integrates Salesforce FieldService Accounts, Contacts, Work Orders & Work Details with Customers, Jobs, Invoice & Line Items of QuickBooks Desktop.

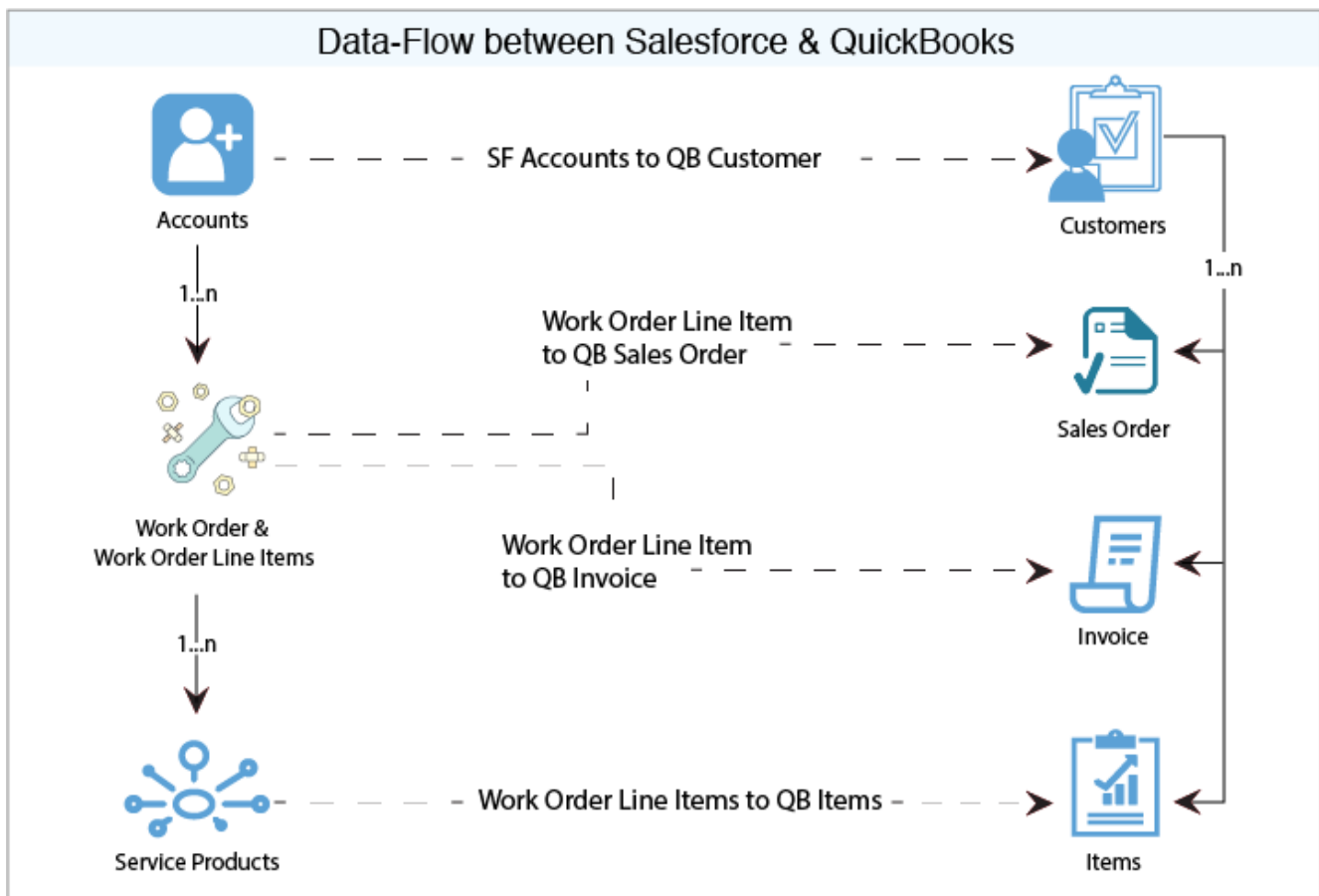
DBSync provides a pre-built field-to-field mapping along with flexibility for more complex and dynamic mapping capability. DBSync also has an automatic online update. This enables DBSync customers to enjoy all the product updates and features with every new release.

This user guide explains the basics of integration like:

- Data Flow & Process Map
- Salesforce to QuickBooks Desktop Field Mapping
- Steps to get started with DBSync

Data Flow & Process Map

Salesforce FieldService to QuickBooks Desktop (Unidirectional)



Pre-requisites for Integration

Integration dataflow is invoked if the following fields in Salesforce are selected as mentioned in the table below.

It is mandatory that Salesforce Work Order (to be integrated with QuickBooks Desktop Invoice) is associated with the respective Salesforce

Account. In addition to that, it should also have work details attached to it for DBSync to be able to undertake the integration.

Salesforce to QuickBooks Desktop– Field Mapping

Getting started with DBSync

1. To register for a Free Trial of Salesforce & QuickBooks Desktop, go to www.mydbsync.com. Click on 'Register for Free Trial' to register for DBSync Account.
2. To include Salesforce FieldService Process Template to DBSync Account: Log in to your DBSync Account. Then, go to the *process template* tab. Click on SalesforceFieldServiceQuickBooks Desktop: UniDirectional to include the template to your account. Go to *My home* tab & click on *Launch* - you will find the new Salesforce FieldService process template.
3. Install DBSync Package into Salesforce FieldService instance: This topic is explained in detail at the end.
4. Configure DBSync with QuickBooks Web connector: Steps involved in the configuration is available in the wiki link - <http://help2.mydbsync.com/docs1/display/dbsync/Configuring+DBSync+with+Quickbook+WebConnector>.
5. Run Integration using QuickBooks Web Connector: Use QuickBooks Web connector to run integration by selecting the right application in Web Connector. 'Update Selected', helps to initiate the sync manually; whereas, Auto-Run is used to schedule integration.

Pre-requisites

Package "Salesforce Field Service", Version 14.10000 or later must be installed in Salesforce Instance.

Installation Steps

1. Click on the link below to install DBSync Package from AppExchange.
2. Enter your Salesforce Username and Password to install DBSync Package in that Salesforce instance. Salesforce Administrators must have the administrative privileges to install the App.
3. DBSync Package Installation Details will be displayed in your Salesforce instance. Click 'Continue'.
4. Approve Package API Access and then click 'Next'.
5. The package is ready to be installed. Click Install to 'install'.
6. 'Install complete' message will be displayed which confirms that DBSync Package is installed.

QuickBooks Desktop Id:

Accounting Id is the unique Id for a record in QuickBooks Desktop After successful integration, Accounting Id is updated in Salesforce for every record that has been synced.

Generate:

Generate field is a picklist field to flag Service either SalesOrder / Invoice or None. By default, the value of Generate field will be blank. It is necessary that Generate field is selected SalesOrder/Invoice for successful generation of SalesOrder/Invoice in QuickBooks Desktop during DBSync Integration.

QuickBooks Error:

'Sync Error', is an error from QuickBooks, that gets updated in Salesforce for every record that has failed to sync. Sync Error briefly describes the reason for sync failure.

7. Once the DBSync Package SF Field Service Integration is installed, the following fields should be included in Page Layout as explained below.
8. Go to setup > Customize > Account > 'Page Layout' > Edit the Page Layout. In the Page Layout, the drag field "QuickBooks Desktop Id" to add it in the "System Information" section of the Page Layout and then, Save.
9. Go to setup > Create > Objects > Work Order > Page Layout > Edit the required Page Layout.
10. In the Page Layout, create a new section "DBSync Information" & drag the fields "QuickBooks Desktop Id", "Generate", "QuickBooks Desktop Error" to add to the Page Layout under "DBSync Information" section.