

Standard QuickBooks Desktop Group Line item Sync

This section illustrates how Group Line items are handled by DBSync for Salesforce and QuickBooks Desktop integration. There can be two scenarios for Group Line item sync from Salesforce to QuickBooks Desktop.

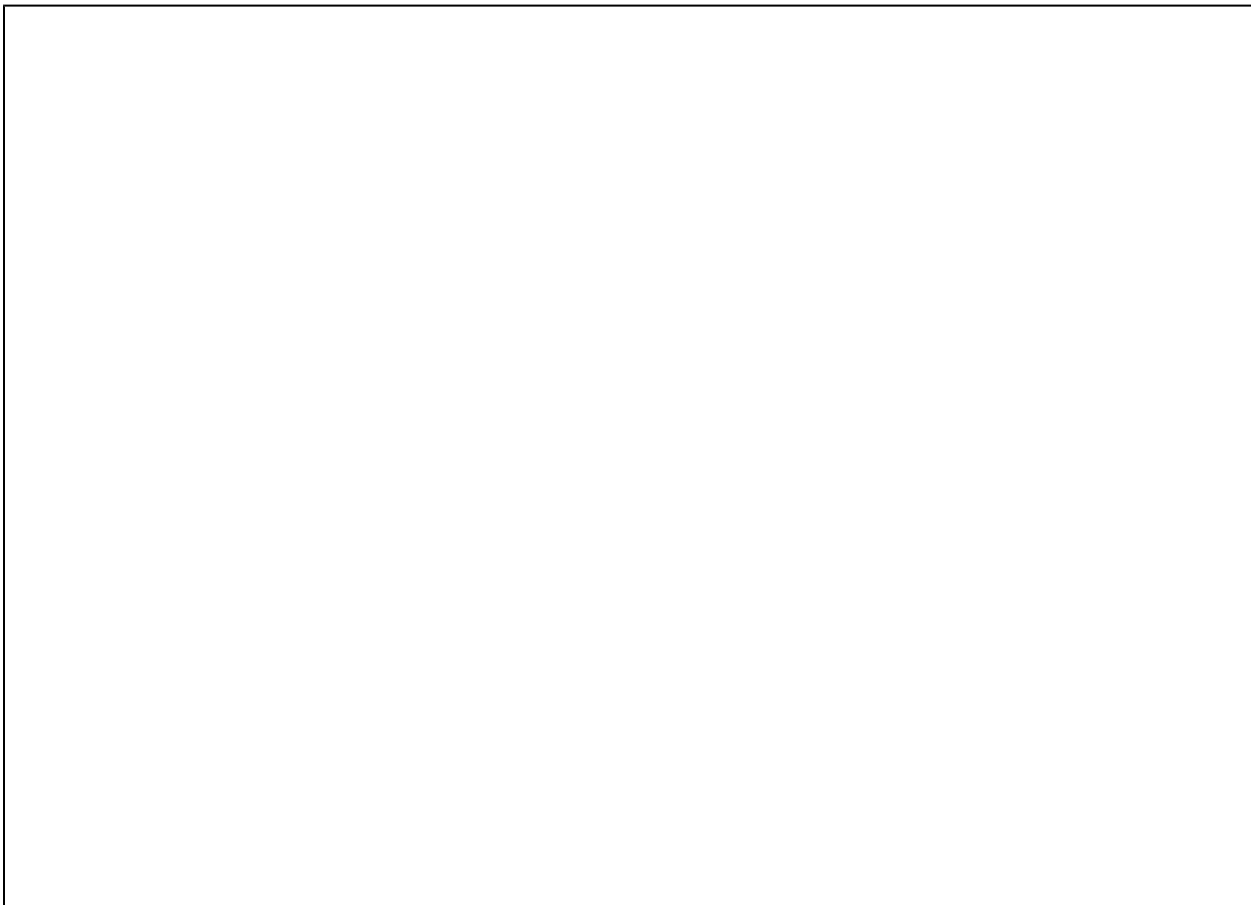
1. An opportunity can have all the Opportunity lines as Group Items OR.
2. It can be a combination of Standard Items and Group Items.

Scenario1: All line items are group items

If a user wants to sync all the Line items in Salesforce as Group Line item in Quickbooks then they can make changes in the transaction (Invoice, Salesorder, Estimate) mapping. Below are the steps.

1. Go to DBSync transaction mapping and look for SalesOrderLineGroupAdd in QuickBooks schema.
2. Put a loop over on the SalesOrderLineGroupAdd field.E.g.- Salesforce Opportunity to Quickbooks Invoice mapping
3. Map required fields like ItemGroupRef, Desc, Quantity.
 - User can put a loop over on
 - SalesOrderLineGroupAdd=OpportunityLineitems/records
4. Remove the loop over from SalesOrderLineAdd and all the existing mapping under SalesOrderLineAdd.
5. Save the mapping and save the workflow.

When syncing the transaction in QuickBooks if the group product name matches with the request sent from Salesforce lineitem(s). It will create the transaction in QuickBooks.





Note: from the above scenario, we will not be able to assign a line price to what is in Salesforce. The Unit price defined for a Group product in QuickBooks automatically picks the Sales price on transactions that we create. Quantity is the only variable that can be picked from Salesforce for a Group Item.

Scenario 2: Standard Line item or Group Line item for a few transactions

If a user wants to Sync transactions using DBSync where they have Individual products and Group Products part of their line items in Salesforce item for few, below are the steps.

- A. Create a filter on the Salesforce product to determine if a line item is a group or individual. It can be done by creating a picklist to identify the Product.
- B. Create a separate workflow for Group Lineitem Transaction sync.
- C. Follow the steps mentioned in the above as Scenario 1.
- D. For individual and Group Lineitem apply the filter in the mapping validate row to segregate the group and individual lineitem.

Note: the above scenario will create two invoices in QuickBooks, one for Group items and One for Individual Items from 1 Salesforce Opportunity.