

# Populate SalesRep on Quickbooks Desktop Invoice from Salesforce Opportunity Owner

## Issue:

The name of the opportunity owner from salesforce to transfer over to the Quickbooks. The “alias” name of the opportunity owner is transferred over to the Quickbooks “rep” field of Invoice.

The screenshot shows the Salesforce 'Opportunity Detail' page for an opportunity named 'Testing'. A red box highlights the 'Opportunity Owner' field, which displays 'Thejaswini C' with a '(Change)' link. Other fields visible include 'Amount' (\$500.00), 'Expected Revenue' (\$500.00), 'Close Date' (2/26/2020), 'Account Name' (I), 'Type', 'Stage' (Closed Won), 'Lead Source', 'Probability (%)' (100%), 'Products Count' (1), and 'Tracking Number'.

Above, the field is shown for the “OpportunityOwner”. This Alias field of the opportunity owner will be mapped to Quickbooks as a “rep”.

## Solution:

6	state_03 e88b0- 64f7- 11e4- 9cfa- bd8588a b6b09	QuickBooks	Insert	ItemOtherCharge	Using Map
7	state_03 a53450- 64f7- 11e4- 9cfa- 873cbd0 6f05	QuickBooks	Insert	Invoice	Using Map
8	state_03 e66cd0- 64f7- 11e4- 9cfa- ff44c9ef7 84d	QuickBooks	Update	DataExt	Using Map

To do so, in the OpportunityToInvoice workflow open the mapping for insert invoice and map the “Alias” in the schema to the FullName of SalesRepRef as shown below.

The screenshot shows a data mapping configuration interface. On the left, there are several fields: 'SalesRepRef' with a 'Loop Over' button and a 'Select Field' dropdown; 'Validate Loop' with a text input containing 'true'; 'Full Name' with a text input containing 'VALUE("Owner/Alias")' (highlighted with a yellow box); 'LinkID' with a text input; 'SalesTaxLineAdd' with a 'Loop Over' button and a 'Select Field' dropdown; and 'SetCredit' with a 'Loop Over' button and a 'Select Field' dropdown. On the right, there is a list of available fields: 'Name', 'AVSFQB\_Quickbooks\_Id\_c', 'Id', 'OpportunityLineItems', 'Account', 'AVSFQB\_Primary\_Contact\_r', 'Owner', and 'Alias'.

And also, make sure the Alias value should be pre-existing in Quickbooks as a sales rep picklist value.

The screenshot shows a QuickBooks 'Invoice' form. At the top, there are fields for 'CUSTOMER\_JOB' (SyncAccountTesting), 'CLASS', and 'TEMPLATE' (Inbuilt Product Invoice). The main section includes 'DATE' (26-02-2020), 'BILL TO' (SyncAccount), and 'INVOICE #' (74). Below these, there are fields for 'P.O. NUMBER', 'TERMS', 'REP' (highlighted with a yellow box and set to 'IRC'), 'SHIP' (26-02-2020), and 'VIA'. At the bottom, there is a table with columns: 'QUANTITY', 'ITEM CODE', 'DESCRIPTION', and 'PRICE E.'. The first row shows a quantity of '1', item code 'Cd', and a price of '12,500.00'.

And Hence, In the above image, we can find the alias name mapped to the Rep field under Invoice in Quickbooks.