

Product Hierarchy in QuickBooks and Salesforce

- [Integration from QuickBooks to Salesforce](#)
- [Integration from Salesforce to QuickBooks](#)

Integration from QuickBooks to Salesforce

- If you use Product Hierarchy in QuickBooks then, Salesforce needs to be updated to support Product Hierarchy.
- Let's say **DBSync** is the parent item for **SF2QuickBooksDesktop** and **SF2QuickBooksOnline** items. Now, if you generate an invoice in QuickBooks with **DBSync** and **SF2QuickBooksDesktop**, Item Name for **DBSync** remains **DBSync** but for **SF2QuickBooksDesktop** it is shown as **DBSync: SF2QuickBooksDesktop**.
- If this invoice is moved to Salesforce Opportunity then, the product is migrated with the parent Name into Salesforce.
- To make changes, go to <https://login.salesforce.com>. Enter your Username and Password. Then, click on Login.
 - **Note** the user logging in, should have administrative privileges to make changes to Salesforce instance.
- Go to **Setup > Customize > Products > Fields** and click on **New** in Products Custom Fields and Relationships.
- Select **Text** in the Next page and click **Next**. Enter Field Label as QuickBooksName, Length as 255 and, Field Name as QuickBooksName. Click **Next**.
- In the next screen, select field-level security for profiles and click **Next**. Check **Add Field** checkbox. Then, check the Page Layouts you want to add it to. Click **Save**.
- Go to **Setup > Customize > Products > Page Layouts**. Click on Edit for Product Layout.
- Add **QuickBooks Name** fields on to the Page Layout. Click Save.
- Go to **Customer Login** in www.mydbsync.com. Enter your username and password. Then, click on Sign-in. Click on **Launch**, to Launch DBSync project page.
- Ensure that the Salesforce and QuickBooks connectors are validated. You should have process template **SalesforceQuickBooksBiDirectional**.
- Click on Projects. Select and open a relevant project. You will see a list of available processes. Select and open the relevant Process. You will see a list of available Workflows.
- Open the workflow **"ItemServiceToProduct"**. In the Rules section, open the map for **"Sequence No. 2"**.
- Add the mapping **QuickBooksName__c = VALUE("FullName")** and save the mapping.
- Similarly, add the above mapping as follows to complete the Product Hierarchy setup:
 - ItemInventoryToProduct
 - ItemNonInventoryToProduct
 - ItemDiscountToProduct
 - ItemOtherChargesToProduct
- Now your Salesforce is configured to handle the Product Hierarchy of QuickBooks.

Integration from Salesforce to QuickBooks

- If you have a Parent-Child relationship for Products in Salesforce then, the following changes need to be made to the mappings.
- Go to **Customer Login** in www.mydbsync.com. Enter your username and password. Click on Sign-in. Click on **Launch**, to Launch the DBSync Project page.
- Ensure that Salesforce and QuickBooks connectors are validated. You should have process template **SalesforceQuickBooksBiDirectional**.
- Click on Projects. Select and open the relevant Project. You will see a list of available processes. Select and open the relevant Process. You will see a list of available Workflows.
- Open the workflow **"OpportunityToInvoice"**. In the Rules section, open the map for **"Sequence No.3"**.
- Find the target field **"ItemServiceAddRq/ItemServiceAdd/Name"**. Then, replace the source code by copy-pasting the following:

```
IF(EXACT(VALUE("PricebookEntry/Product2/AVSFQuickBooks__QuickBooks_ItemType__c"), "ItemService"),
  RSPLIT(VALUE("PricebookEntry/Product2/Name"), ":"), "")
```

- Add the mapping where target field = **"ItemServiceAddRq/ItemServiceAdd/ParentRef/FullName"** and source field as the following:

```
IF(EXACT(VALUE("PricebookEntry/Product2/AVSFQuickBooks__QuickBooks_ItemType__c"), "ItemService"),
  (IF(VALUE("PricebookEntry/Product2/Name").contains(":"),
    LSPLIT(VALUE("PricebookEntry/Product2/Name"), ":"), "")), "")
```

- Similarly, open the **Sequence No.4** mapping.
- Find the target field **"ItemInventoryAddRq/ItemInventoryAdd/Name"** and replace the source code by copy-pasting the following:

```
IF(EXACT(VALUE("PricebookEntry/Product2/AVSFQuickBooks__QuickBooks_ItemType__c"), "ItemInventory"),
  RSPLIT(VALUE("PricebookEntry/Product2/Name"), ":"), "")
```

- Find the target field **"ItemNonInventoryAddRq/ItemNonInventoryAdd/Name"**. Replace the source code by copy-pasting the following: Add the mapping where target field = **"ItemInventoryAddRq/ItemInventoryAdd/ParentRef/FullName"** and source field as the following:

```
IF(EXACT(VALUE("PricebookEntry/Product2/AVSFQuickBooks__QuickBooks_ItemType__c"), "ItemInventory"),
  (IF(VALUE("PricebookEntry/Product2/Name").contains(":"),
    LSPLIT(VALUE("PricebookEntry/Product2/Name"), ":"), "")), "")
```

- Similarly, open the **Sequence No.5** mapping.

- IF(EXACT(VALUE("PricebookEntry/Product2/AVSFQuickBooks__QuickBooks_ItemType__c"), "ItemNonInventory"),
 RSPLIT(VALUE("PricebookEntry/Product2/Name"), ":"), "")

- Add the mapping where target field = **"ItemNonInventoryAddRq/ItemNonInventoryAdd/ParentRef/FullName"** and source field as the following:

```
IF(EXACT(VALUE("PricebookEntry/Product2/AVSFQuickBooks__QuickBooks_ItemType__c"), "ItemNonInventory"),
  (IF(VALUE("PricebookEntry/Product2/Name").contains(":"),
    LSPLIT(VALUE("PricebookEntry/Product2/Name"), ":"), "")), "")
```

- The above example illustrates Product Hierarchy mapping for **OpportunityToInvoice** state. Based on the transaction you use, a similar procedure can be followed for other transaction workflows like **OpportunityToEstimate, OpportunityToSalesOrder, OpportunityToSalesReceipt, OpportunityToCreditMemo**.