

# Product Hierarchy in QuickBooks and Salesforce

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## 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](http://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](http://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**.