

Running the Integration_

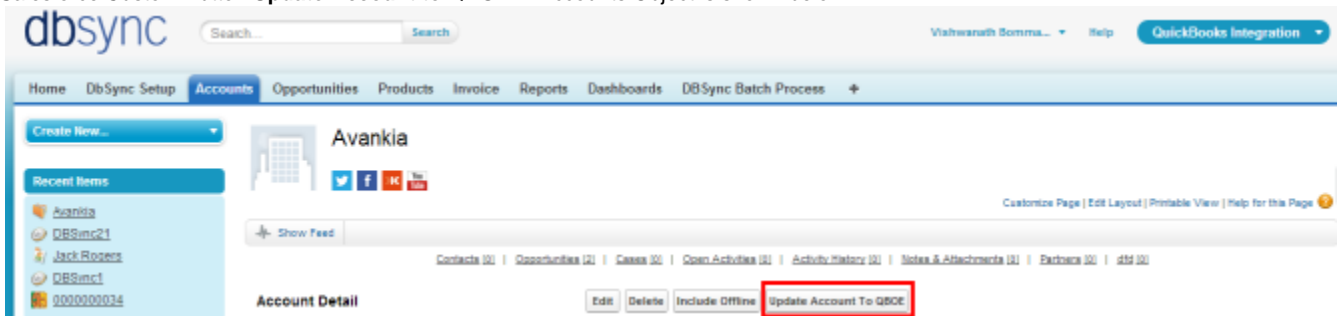
DBSync Integration of Salesforce & QuickBooks Online can be initiated by the following three methods.

- Using Salesforce custom buttons:
- Using DBSync Scheduler:

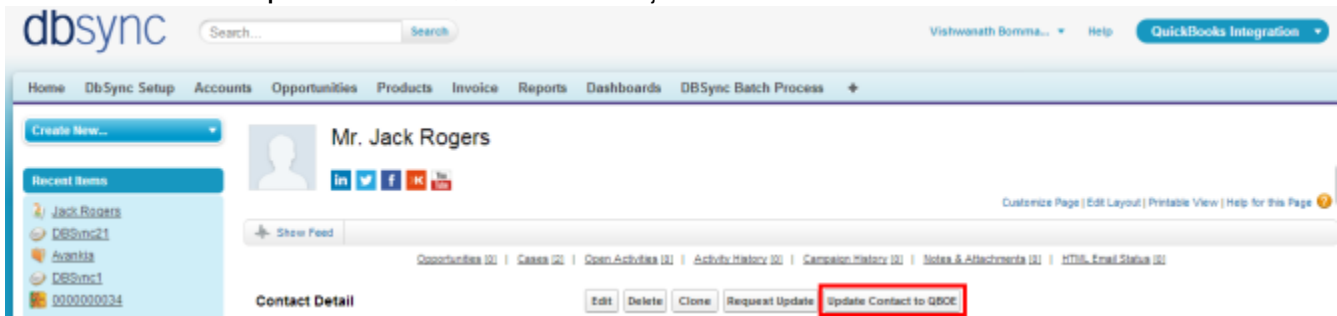
Using Salesforce custom buttons:

Salesforce custom buttons in Salesforce Accounts, Contacts and Opportunity can be used to update these specific records into QuickBooks as and when required. To set Auto run of integration, one of the next methods should be used.

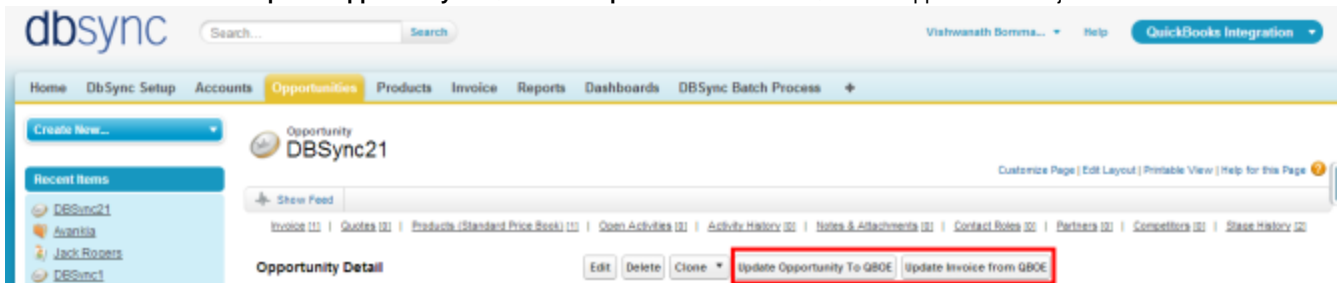
Salesforce Custom Button **Update Account to QBOE** in Accounts Object is shown below.



Salesforce Custom Button **Update Contact to QBOE** in Contacts Object is shown below.



Salesforce Custom Button **Update Opportunity to QBOE** and **Update Invoice from QBOE** in Opportunities Object is shown below.



Using DBSync Scheduler:

Scheduler available in DBSync Account can be used to schedule the integration.

Login to DBSync account, click on *Launch* to go to DBSync profile page and click on *Scheduler* on the top right corner.

Profiles	
Name	
SalesforceQuickBooksOnlineBIDirectional	Quick Start Log Viewer Manage +
Create Profile	

[Mr. Moore](#)
[Mr. Lissauer](#)
[Edit Account](#)
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Select the integration profile and required process to auto run. Edit the Cron Settings to set the frequency of Auto run and Save Cron Job.

Add Scheduled Cron

Profile: **SalesforceQuickBooksOnlineBIDirectional**

Process: **None** [Save Cron Job](#)

Cron Settings

Second: Allowed Values: 0-59 Allowed Special characters: . * /

Minute: Allowed Values: 0-59 Allowed Special characters: . * /

Hour: Allowed Values: 0-23 Allowed Special characters: . * /

Month: Allowed Values: 1-12 or JAN - DEC Allowed Special characters: . * / L W

Day of Month: Allowed Values: 1-31 or SUN - SAT Allowed Special characters: . * /

Day of Week: Allowed Values: 0-6 Allowed Special characters: . * L / #

Cron Help

- The "*" character is used to specify all values. For example, "*" in the minute field means "every minute".
- The "?" character is allowed for the day-of-month and day-of-week fields. It is used to specify "no specific value". This is useful when you need to specify something in one of the two fields, but not the other.
- The "/" character is used to specify ranges. For example "10-12" in the hour field means "the hours 10, 11 and 12".
- The "L" character is used to specify additional values. For example "MON,WED,FRI" in the day-of-week field means "the days Monday, Wednesday, and Friday".
- The "Y" character is used to specify increments. For example "0/15" in the seconds field means "the seconds 0, 15, 30, and 45". And "5/15" in the seconds field means "the seconds 5, 20, 35, and 50". Specifying "*" before the "Y" is equivalent to specifying 0 is the value to start with. Essentially, for each field in the expression, there is a set of numbers that can be turned on or off. For seconds and minutes, the numbers range from 0 to 59. For hours 0 to 23, for days of the month 0 to 31, and for months 1 to 12. The "Y" character simply helps you turn on every "nth" value in the given set. These "Y" in the month field only turn on month "Y" if also M/Y means

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