Data Flow & Process Map_
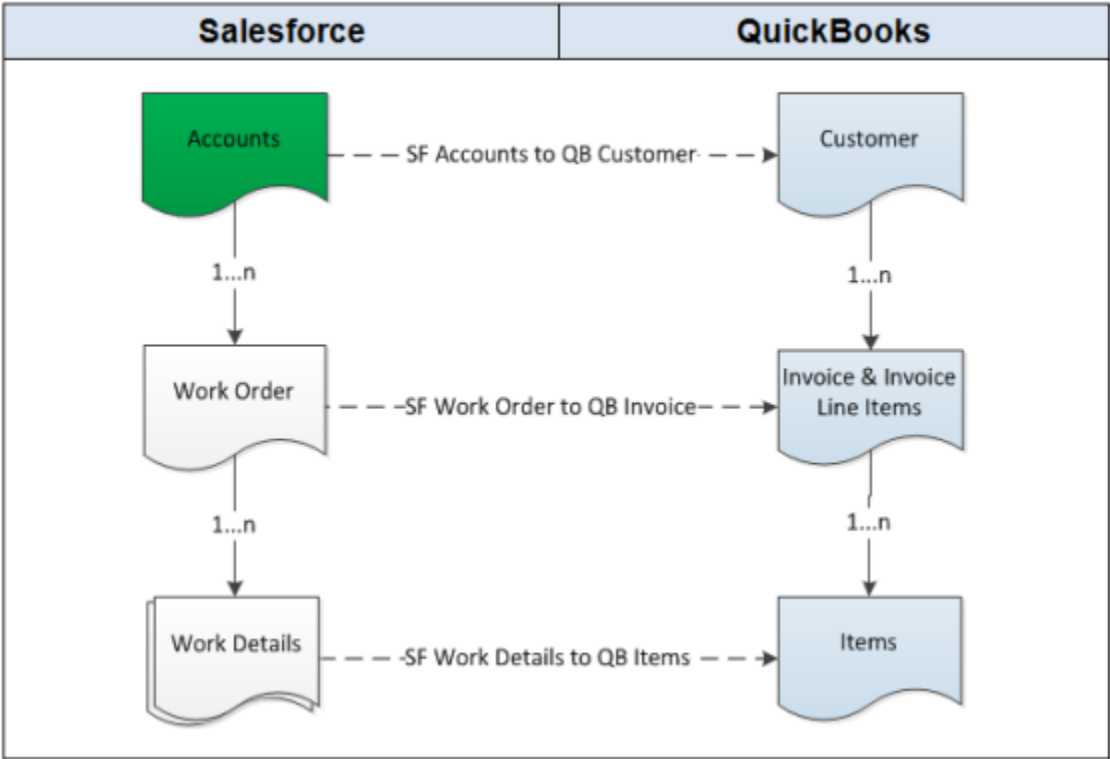
ServiceMax Salesforce to QuickBooks Desktop (Unidirectional)

Salesforce	QuickBooks
Accounts / Contacts	Customer
Work Order & Work Details	Invoice & Invoice Line Items
Work Details	Items

Data flow from Salesforce to QuickBooks

Pre-requisites for Integration:
Integration dataflow is invoked provided the following fields in Salesforce are selected as mentioned in the below table.
It is mandatory that SF Work Order (to be integrated with QuickBooks Invoice) is associated with the respective SF Account & also should have work details attached to it for DBSync to invoke integration.

Work Order	Generate	Invoice
Work Order	Order Status	Closed
Work Details	Record Type	Usage/Consumption
Work Details	Is Billable	?

Salesforce to QuickBooks – Field Mapping:

Salesforce Object / Field	QuickBooks Entity
Accounts	**Customers**
Name	Name
Billing Address	Bill To
Shipping Address	Ship To
Phone	Phone
Fax	Fax
Contacts	**Customers / Jobs**
Name	Contact Name
First Name	First Name
Last Name	Last Name
Email	Email
Work Order & Work Details	**Invoice & Invoice Line Items**
Work Order Number	Job Name
Work Detail Part	Invoice Item Name
Work Detail Line Price Per Unit	Invoice Item Rate
Work Detail Line Qty	Invoice Item Quantity
QuickBooks Invoice Date	Invoice Date
Work Detail Work Description	Invoice Item Description
Work Details	**Service Items**
Work Detail Part	Item Name
Work Detail Work Description	Item Description
Work Detail Line Price Per Unit	Rate