

QuickBooks to Salesforce Data Migration

Introduction

1. The purpose of Migration is to migrate the user's historical data on a single integration run.
2. Update functionality updates records in QuickBooks and Salesforce.
3. The section 'QuickBooks to Salesforce Migration Process' below, provides step by step instructions on how to initiate the migration of your Quickbooks records into Salesforce objects using **Salesforce & Quickbooks Bidirectional** Process Template.

QuickBooks to Salesforce Migration Process

1. Go to www.mydbsync.com. Click on **Customer Login**.
2. Enter your **Username** and **Password**. Click on **Sign in**.
3. Click on **Launch** to check if **Salesforce and QuickBooks Bidirectional** Process Template is added to the profile.
4. If Salesforce and QuickBooks Bidirectional Process Template is not included in the profile, go back to the Home page. Click on **Process Template** to see the list of process templates.
5. Click on **SalesforceQuickBooks:Bidirectional** to add this template to your profile.
6. Click on **Launch**. DBSync Projects page will display in the next tab.
7. Click on **Projects > SalesforceQuickBooks:Bidirectional > Connectors**.
8. Configure DBSync with QuickBooks Web connector. For a detailed step by step configuration process click on [Configuring DBSync with QuickBooks Web Connector](#) link.
9. Based on the requirements, appropriate steps must be enabled before running the integration.
10. To migrate QuickBooks Customer to Salesforce Accounts, click on Processes > SalesforceQuickBooks:Bidirectional > turn on **Customer ToAccount** work flow. In the "*Last Success Run*", edit the date from which you want to Migrate the data. Click on **Save**.
11. To migrate QuickBooks Items to Salesforce Products, click on Processes > SalesforceQuickBooks:Bidirectional > turn on **ItemServiceTo Product** work flow. In the "*Last Success Run*" edit the date from which you want to Migrate the data. Click on **Save**.
12. To migrate QuickBooks Invoice to Salesforce Opportunity, click on Processes > SalesforceQuickBooks:Bidirectional > turn on **InvoiceTo Opportunity** work flow. In the "*Last Success Run*" edit the date from which you want to Migrate the data. Click on **Save**.
13. Follow similar procedure to migrate Items belonging to Item types **Inventory, Non-Inventory, Discount, Other Charge and Sales Tax** and the transactions of type **Estimate, SalesOrder, SalesReceipt and CreditMemo**.