Salesforce & QuickBooks Online - Standard Uni- directional Integration

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Overview:

Standard Integration from DBSync for Salesforce & QuickBooks Online is an easy to use application. It integrates Salesforce Accounts/Contacts, Products, Opportunity with QuickBooks Customers, Items & Invoice. DBSync provides sync with pre-built field-to-field mapping along with flexibility for more complex and dynamic mapping capability. DBSync's automatic online update enables its customers to enjoy all the product updates and features that come with every new release.

Data Flow:

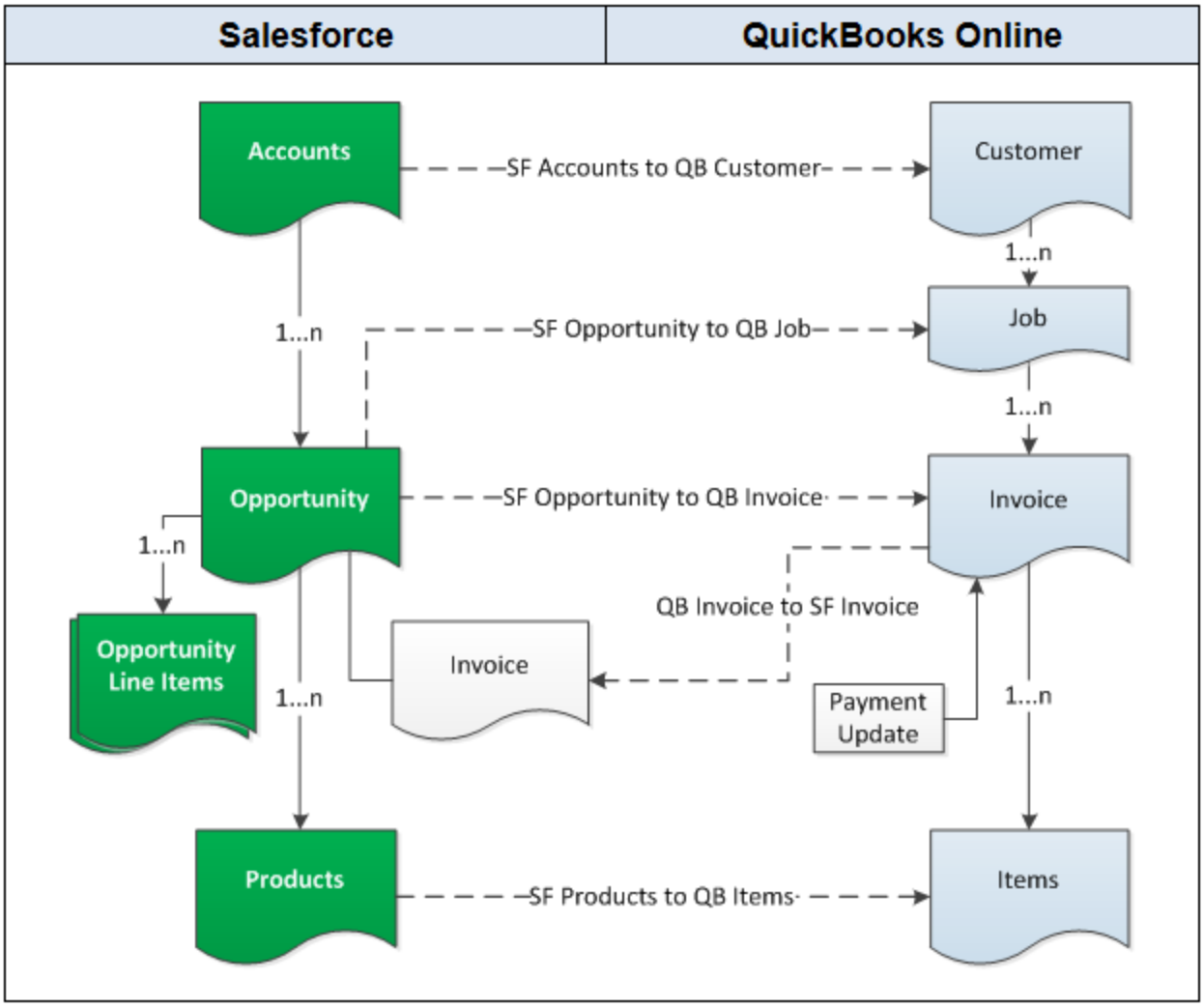
Integration data flow between Salesforce & QuickBooks Online is shown in the table below.

Salesforce	⇒	QuickBooks Online
Accounts / Contacts	⇒	Customer / Contacts
Opportunity Name	⇒	Job Name
Opportunity & Line Items	⇒	Invoice & Line Items
DBSync Invoice	⇐	Payment on Invoice
Products	⇒	Items

Process Map:

Process Map of Standard integration between Salesforce & QuickBooks Online is shown in the image below.

Data flow between Salesforce & QuickBooks Online



Pre-requisites for Integration:

- Integration of Salesforce to QuickBooks Invoice is invoked if the **Generate** field in Salesforce Opportunity is selected as Invoice.
- It is mandatory that SF Opportunity (to be integrated with QuickBooks Invoice) is associated with the respective **SF Account.** It should also have **Products with Standard Price Book** attached to it for DBSync to invoke integration.
- Salesforce Products should also have **QuickBooks Item Type**.

DBSync Profile Setup

- Go to www.mydbsync.com and register for a Free Trial. Ensure that Source & Target Adapters are Salesforce and QuickBooks Online respectively. Choose the standard package during registration.

Running the Integration:

DBSync Integration of Salesforce & QuickBooks Online can be initiated by using Salesforce custom buttons. For details see below:

1. 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 integration to Auto run, use one of the following methods.
2. Salesforce Custom Button **Update Account to QuickBooksOE** in Accounts Object.
3. Salesforce Custom Button **Update Contact to QuickBooksOE** in Contacts Object.
4. Salesforce Custom Button **Update Opportunity to QuickBooksOE** and **Update Invoice from QuickBooksOE** in Opportunities Object.