**Quickbooks To Salesforce Migration process**

**Migration of Customers in Quickbooks to Accounts in Salesforce**

**Step1** : In the “***Quickstart*** “ window all the default mappings are listed in the left menu.

**Step2 :** Select the CustomerToAccount state and check the **Status Check Box** to make it part of integration, as shown in the Screen shot below.



Note : Similarly you can select or deselect other mappings as required.

To Migrate the data from the required date.

Step1 : Go to Quick Start window.

Step2: From the left Menu Select the CustomerToAccount state.

Step3 : In the “*Last Success Run*” Edit the date from when you want to Migrate the data and Click on Save.



Note : Similarly you can Edit the Last\_Success\_Run for the other mappings as required.

Once you are done with the mappings go to your QuickBooks Web Connector by **Start**  **Programs**  **QuickBooks**  **Web Connector** and Run the Sync.



**Migration of Items in Quickbooks to Products in Salesforce**

**Step1:** Go to “*Quickstart”*  window all the default mappings are listed in the left menu.

**Step2:** Select the ItemServiceToProducts state and check the **Status Check Box** to make it part of integration. As shown in the screen shot below.



Note : Similarly you can select or deselect other mappings like ItemInventoryToProduct, ItemNonInventoryToProduct as required.

To Migrate the data from the required date.

Step1 : Go to Quick Start window.

Step2: From the left Menu Select the ItemServiceToProducts.

Step3 : In the “*Last Success Run*” Edit the date from when you want to Migrate the data and Click on Save.



Note : Similarly you can Edit the Last\_Success\_Run for the other mappings as required.

Once you are done with the mappings go to your QuickBooks Web Connector by **Start**  **Programs**  **QuickBooks**  **Web Connector** and Run the Sync.



**Migration of Invoices in Quickbooks to Opportunity in Salesforce**

**Step1:** Go to “*Quickstart”*  window all the default mappings are listed in the left menu.

**Step2:** Select the InvoiceToOpportunity state and check the **Status Check Box** to make it part of integration. As shown in the screen shot below

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Note : Similarly you can select or de-select other mappings like EstimateToOpportunity, SalesOrderToOpportunity as required.

To Migrate the data from the required date.

Step1 : Go to Quick Start window.

Step2: From the left Menu Select the InvoiceToOpportunity.

Step3 : In the “*Last Success Run*” Edit the date from when you want to Migrate the data and Click on Save.



Note : Similarly you can Edit the Last\_Success\_Run for the other mappings as required.

Once you are done with the mappings go to your QuickBooks Web Connector by **Start**  **Programs**  **QuickBooks**  **Web Connector** and Run the Sync.

