Salesforce QuickBooks Custom Mappings

Integration between Salesforce and QuickBooks with, out of the box solution, is explained in section Salesforce QuickBooks Bi-directional Integration Process.

If any additional fields or objects integration is required - between Salesforce and QuickBooks - DBSync Mapping must be customized as per the requirement. This section explains the step-by-step process involved in customizing DBSync Mapping.

- Go to www.mydbsync.com. Click on ***Customer Login***. Enter your ***Username*** and ***Password.*** Click *on* ***Sign in***. Click on ***Launch*** to access Development Studio.
- Login to your DBSync account with credentials to make changes or, create hierarchy mappings. Once you have logged into your DBSync account, click on ***Development Studio.***
- Make sure that you have validated Salesforce and QuickBooks Connectors.
- Click on Projects on the left panel. There, you will see a list of available Projects. Click on the relevant Project. You will see a list of Processes.
- Click on the relevant Process. Next, you will see a list of workflows. Create on New - the button is used to create a new workflow.
- Each workflow will have trigger & rules.
- The trigger has 3 tabs: Query Builder, Advanced Query Builder and Properties.
- You can have one or more rules in a workflow. Each rule will have a map. This map displays a list of target fields available for mapping. Also, you will see the schema of the source fields. You can drag and drop source fields and map target fields accordingly.
- Further information on Mapping is detailed in the wiki iPaaS section.