Salesforce QuickBooks Unidirectional Sync Using BiDirectional Profile

Overview

- Click on **Customer Login** at www.mydbsync.com. Then, enter the registered username and password to **sign in.** Click on **Launch** to Access DBSync Project Console.

- In the Project console, click on Template Library on the left panel. A list of DBSync will be displayed.

- Choose your template according to the Connectors you have. In this Demo, I will be using the "**Salesforce and QuickBooks Bidirection al**" Template. Click on **Try Now** Button next to SalesforceQuickBooks: BiDirectional.

- A new **Project** will be added in the Project section with the **Template** Name.

- Click on the template SalesforceQuickBooks: Bidirectional. Then, click on the connectors. You should have Salesforce and QuickBooks Connectors. Make sure that both the Connector settings are validated.

- You can refer to the http://help2.mydbsync.com/docs1/display/dbsync/Configuring+DBSync+with+Quickbook+WebConnector link for the details on configuring DBSync with Salesforce and QuickBooks Desktop.

- Go to the newly added Project SalesforceQuickBooks: Bidirectional. Click on the available process.

- You will see a list of workflows. Each workflow will have the Trigger & Rules.

- Default mappings are listed in the rule of each Rule. You also have the capability to create custom mappings as per your business.

- You can choose to use, or not use, a specific workflow. **Status** of the workflow can be either **On or Off**. Based on the business process and the integration requirement, you can choose which one to keep ON. If you want to keep the dataflow moving from Salesforce Opportunity to QuickBooks Invoice, **OpportunityToInvoice** status should be ON.

Salesforce as Master Database

- The following workflows should be kept ON based on the integration requirement to keep Salesforce as a master database for uni-directional integration:
    - AccountToCustomer
    - ProductToItemService
    - ProductToItemInventory
    - ProductToItemNonInventory
    - ProductToOtherCharge
    - ProductToDiscount
    - OpportunityToInvoice
    - OpportunityToEstimate
    - OpportunityToSalesOrder
    - OpportunityToSalesReceipt

QuickBooks as Master Database

- The following workflows should be kept ON based on the integration requirement to keep QuickBooks as a master database for uni-directional integration:
    - CustomerToAccount
    - ItemServiceToProduct
    - ItemInventoryToProduct
    - ItemNonInventoryToProduct
    - ItemDiscountToProduct
    - ItemOtherChargeToProduct
    - InvoiceToOpportunity
    - InvoiceToInvoice
    - EstimateToOpportunity
    - SalesOrderToOpportunity
    - SalesReceiptToOpportunity

Run Integration

- Once you are done with the mappings, you can run the integration using the scheduler or QuickBooks WebConnector.

- If you are using QuickBooks Web Connector 'AutoRun' in QuickBooks, then, the Web Connector must be used to run integration on a fixed interval. To run the integration manually, *'Update Selected'* in QuickBooks Web Connector must be used.
- Scheduler process is applicable for Only QuickBooks Online Connector/adapter.