MS CRM and QuickBooks Custom Mappings

Integration between MS CRM and QuickBooks, with out of the box solution, is explained in section MS CRM & QuickBooks Integration.

If any additional Field or Object integration is required - between MS CRM 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.*** Then, click *on* ***Sign in***. Click on ***Launch*** to access DBSync Project page.
- Login to your DBSync account with your credentials to make changes, or to create, hierarchy mappings. Once you have logged into your DBSync account, click on ***Launch*** to Launch DBSync Project page.
- Make sure that you have validated MS CRM & QuickBooks Connectors.
- Click on Projects on the left panel - 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. Here, you will see a list of workflows. The, 'Create New' workflow button can be used to create a new workflow.
- Each workflow will have trigger & rules.
- Trigger has 3 tabs - Query Builder, Advanced Query Builder and, Properties.
- You can have one or more Rule in a workflow. Each rule will have a map. This map displays a list of target fields available for mapping. Also, you will see schema of source fields. You can drag and drop these source fields, to the target fields, and map accordingly.