Example of QuickBooks to MS CRM Custom Mappings

In this section, I explain the process of customizing DBSync Mapping. Three Custom fields are created in MS CRM Product Object & QuickBooks Item. The steps shown below explains DBSync customization process to integrate these Custom fields of MS CRM and QuickBooks.

- Create custom fields in the Product Object of MS CRM named as:
    - ReOrder Quantity.
    - Inventory Site.
- Create the same fields in Item of QuickBooks.
- Go to www.mydbsync.com. Select ***Customer Login***. Enter your ***Username*** and ***Password.*** Click ***Sign in***. Click on ***Launch*** to launch DBSync Project Console.
- Click on Project on the left panel. Here, you will see a list of Projects. And, then, you will see a default project for MS CRM and QuickBooks integration.
- Click on the Project. You will see the process. Click on the process to open available workflows.
- On the left side of the Project Console, click on Connectors. You will see MS CRM and QuickBooks Connectors. Make sure that both the connectors are validated.
- If you are using **MSCRM and QuickBooks BiDirectional** process, you will find a list of workflows. Click on the workflow **ProductToInventory**.
- In the main section of mapping screen, you will see a list of available fields in MS CRM. On the right section of the mapping screen, you see schema. Schema will have a list of QuickBooks fields.You can add a new mapping by entering VALUE("ColumnApiName") in the field next to the required Target field i.e. QuickBooks field. You can just drag and drop the required field from Schema into the target field.
- Add the mappings as shown below:
    - **new_reorderquantity = VALUE("Re-Order Quantity").**
    - **new_inventorysite= VALUE("Inventory Site").**
- Once done, click on Save and Close button on the top right.
- Go to Windows Start **>** Programs **>** QuickBooks **>** Web Connector.
- Web Connector is launched with the selected integration profile. Select the integration profile/profile Name, Enter DBSync password and finally click on "Update Selected" to perform the sync. The Custom Fields in QuickBooks will be populated with Data in MS CRM.
- Check your MS CRM and QuickBooks instance for updated data.

Note- If the QuickBooks field is Custom defined, add Custom defined label.