

Install DBSync Package into ServiceMax Salesforce instance_

DBSync Package ServiceMax Accounting Integration is installed in ServiceMax Salesforce Instance. Pre-requisites and the steps involved in installation are explained in this section.

Pre-requisites:

Package "ServiceMax", Version 14.10000 or later must be installed in Salesforce Instance to install DBSync Package "Service Max Accounting Integration".

Installation Steps:

- Click on the below link to install DBSync Package from AppExchange

<https://login.salesforce.com/package/installPackage.apexp?p0=04ti0000000TUR5>

- Enter your Salesforce Username and Password to install DBSync Package in that Salesforce instance. Salesforce instance must have the administrative privileges to install App.
- DBSync Package Installation Details will be displayed in your Salesforce instance. Click on 'Continue'.

The screenshot shows the Salesforce user interface. At the top, there's a header with the 'express service max' logo and a search bar. Below the header is a navigation bar with links: Home, Accounts, Contacts, Installed Products, Service Contracts, Work Orders, Schedules, Reports, Dashboards, and a plus sign. On the left is a sidebar with a 'Quick Find' search bar and expand/collapse options. The sidebar contains sections: 'Force.com Home', 'System Overview', 'Personal Setup' (with links to My Personal Information, Email, Import, Desktop Integration, and My Chatter Settings), and 'App Setup' (with links to Customize, Create, Develop, and Deploy). The main content area is titled 'Package Upgrade Details'. It contains two tables. The first table, 'Package Details', has columns for Package Name (ServiceMax Accounting Integration), Version Name (Spring14), Version Number (1.2), Publisher (undefined), and Description. The second table, 'Installed Version Information', has columns for Package Name (ServiceMax Accounting Integration), Version Name (Spring14), Version Number (1.2), and Description. Below the tables are 'Continue' and 'Cancel' buttons. The 'Continue' button is highlighted with a red box. At the bottom, there's a 'Package Components' section with a message: 'There are no major components to install or upgrade.'

- Approve Package API Access and then click on 'Next'.

express service MAX

Search...

24 Days Remaining [Subscribe Now!](#)

Aveenash Rao Help & Training [ServiceMax](#)

Home Accounts Contacts Installed Products Service Contracts Work Orders Schedules Reports Dashboards +

Quick Find

Expand All | Collapse All

Force.com Home

System Overview

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration
- My Chatter Settings

App Setup

- Customize
- Create
- Develop
- Deploy
 - Schema Builder
 - Canvas App Previewer
- Installed Packages
- AppExchange Marketplace
- Critical Updates

Administration Setup

- Manage Users
- Manage Apps
- Company Profile
- Security Controls
- Domain Management
- Communication Templates

Package Installer

ServiceMax Accounting Integration

Help for this Page

Step 1. Approve Package API Access Step 1 of 2

These settings control the access that s-controls and other components in this package have to standard objects via the API. The access will still be constrained by the user's profile. You can view and edit the package API access to standard objects after the package is installed from the package detail page. [Tell me more](#)

Package Custom Objects

This Package will have the user's access (via the API) to all Custom Objects in your Organization.

Extended Object Permissions

	Read	Create	Edit	Delete		Read	Create	Edit	Delete
Accounts	✓	✓	✓	✓	Ideas	✓	✓	✓	✓
Assets	✓	✓	✓	✓	Leads	✓	✓	✓	✓
Campaigns	✓	✓	✓	✓	Opportunities	✓	✓	✓	✓
Cases	✓	✓	✓	✓	Price Books	✓	✓	✓	✓
Contacts	✓	✓	✓	✓	Products	✓	✓	✓	✓
Contracts	✓	✓	✓	✓	Push Topics	✓	✓	✓	✓
Documents	✓	✓	✓	✓	Solutions	✓	✓	✓	✓

General User Permissions

This Package will be able to use all of the General User Permissions from the user's Profile.

Administrative Permissions

This Package will be able to use all of the Administrative Privileges from the user's Profile.

[Next](#) [Cancel](#)

- Package is ready to be installed. Click Install to 'install'.

express service MAX

Search...

24 Days Remaining [Subscribe Now!](#)

Aveenash Rao Help & Training [ServiceMax](#)

Home Accounts Contacts Installed Products Service Contracts Work Orders Schedules Reports Dashboards +

Quick Find

Expand All | Collapse All

Force.com Home

System Overview

Personal Setup

- My Personal Information
- Email

Package Installer

ServiceMax Accounting Integration

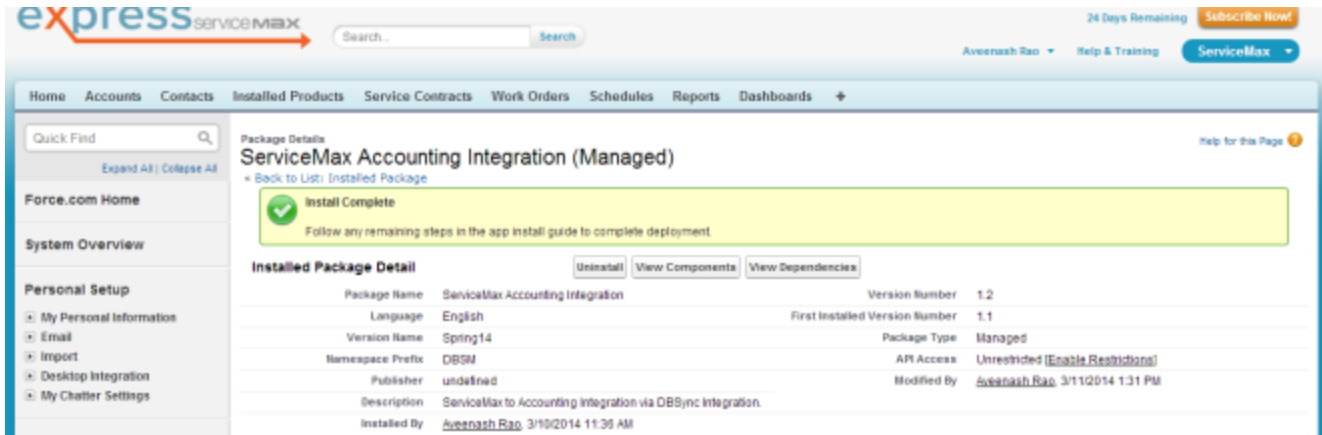
Help for this Page

Step 2. Install Package Step 2 of 2

The package is ready to be installed. Click Install to continue.

[Previous](#) [Install](#) [Cancel](#)

- Install complete message will be displayed which confirms that DBSync Package is installed.



- Once the DBSync Package ServiceMax Accounting Integration is installed the below fields should be included in Page Layout as explained below.

Accounting Id:

Accounting Id is the unique Id for a record in QuickBooks. After successful integration, Accounting Id is updated in Salesforce for every record that has been synced.

Generate:

Generate field is a picklist field to flag Work Order either Invoice or None. By default the value of Generate field will be blank. It is necessary that Generate field is selected Invoice for successful generation of Invoice in QuickBooks during DBSync Integration.

Invoice Date:

Invoice Date is a formula field to display the date on which the Work Order is flagged as Invoice to Sync as QuickBooks Invoice.

Sync Error:

Sync Error is an error from QuickBooks which gets updated in Salesforce for every record that has failed to sync. Sync Error briefly describes the reason for failure of sync.

- Go to setup
 - Customize
 - Account
 - 'Page Layout'

Edit the Page Layout. Under the Page Layout drag the fields specified below to add it under the section "System Information" in Page Layout and save.

- Fields: "Accounting Id", "Sync Error"

The screenshot shows the ServiceMax web application interface. The top navigation bar includes the ServiceMax logo, a search bar, and user information (Avenash Rao, 23 Days Remaining, Subscribe Now). The main navigation menu includes Home, Accounts, Contacts, Installed Products, Service Contracts, Work Orders, Schedules, Reports, and Dashboards. The 'Accounts' tab is selected, and the page displays the 'Account Detail' for 'Burlington Textiles Corp of America'. The 'Service Information' section shows 'Accounting Id' and 'Sync Error' fields, both highlighted with red boxes. The 'Accounting Id' field is also highlighted with a red box in the 'Service Information' section.

- Go to setup
 - ➡ Create
 - ➡ Objects
 - ➡ Work Order
 - ➡ Page Layout
 - ➡ Edit the required Page Layout.

Under the Page Layout create a new section "DBSync Information" & drag the fields specified below to add it in Page Layout under "DBSync Information".

- Fields: "Accounting Id", "Invoice Date", "Generate", "Sync Error"

The screenshot shows the ServiceMax web application interface. The top navigation bar includes the ServiceMax logo, a search bar, and user information (Avenash Rao, 23 Days Remaining, Subscribe Now). The main navigation menu includes Home, Accounts, Contacts, Installed Products, Service Contracts, Work Orders, Schedules, Reports, and Dashboards. The 'Work Orders' tab is selected, and the page displays the 'Work Order Detail' for 'WO-00000542'. The 'DBSync Information' section shows 'Generate', 'Accounting Id', and 'Sync Error' fields, all highlighted with red boxes.

- Go to setup
 - ➡ Create
 - ➡

Objects



Work Detail



Page Layout



Edit the required Page Layout.

Under the Page Layout drag the field specified below to add it in Page Layout under "Usage/Consumption Details".

- Fields: "LineItem Type"

The screenshot displays the ServiceMax interface for a Work Order Detail. The work order number is WL-00000185. The 'Usage/Consumption Details' section is expanded, showing various fields such as 'Part' (Ultrasound Logic 200), 'Line Qty' (1.0000), 'Line Price Per Unit' (USD 2,500.00), and 'Total Line Price' (USD 2,500.00). The 'LineItem Type' field is highlighted with a red box, indicating the field to be added to the page layout. The page also includes a sidebar with 'Recent Items' and 'ServiceMax Admin' links, and a top navigation bar with various menu items like Home, Accounts, Contacts, etc.

DBSync LLC

750 Old Hickory Blvd.
Bldg 2, Suite 150
Brentwood TN 37027
U.S.A
Email
sales@avankia.com
Phone/Fax
1-877-739-2818

Copyright @ 2010, DBSync LLC and/or its affiliates. All rights reserved. This document is provided for information purpose only, and the contents hereof are subject to change without notice. This document is not warranted to be error-free, nor is it subject to any other warranties or conditions, whether expressed orally or implied in law, including implied warranties and conditions of merchantability or fitness for a particular purpose. We specifically disclaim any liability with respect to this document, and no contractual obligations are formed either directly or indirectly by this document. This document may not be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without our prior written permission.

DBSync is a registered trademark of DBSync LLC and/or its affiliates. Other names may be trademarks of their respective owners.