Invoice to Opportunity insertion based on Account Name

SYNCING INVOICES BASED ON CUSTOMER TYPE

For Invoices to sync based on particular customer type do the following changes:

Go to the workflow:" Invoices to Opportunity"

1st Rule: SF UPSERT AVSFQB_INVOICE__C

VALIDATE ROW : IF(ISEMPTY(VALUE("OpportunityId")),IF(VALUE("CustomerRef/FullName/CustomerRet/CustomerTypeRef/FullName").equals("Retail"),"true","false"),"false")

Here "Retail" is the customer type we can change according to our requirement.

2ND RULE: SF UPDATE OPPORTUNITY

VALIDATE ROW: IF(VALUE("OpportunityId")!="",IF(VALUE("CustomerRef/FullName/CustomerRet/CustomerTypeRef/FullName").equals("Retail"),"true","false"),"false")

Here "Retail" is the customer type we can change according to our requirement.

3rd RULE: SF UPSERT OPPORTUNITYLINEITEM

VALIDATE ROW:

IF(ISEMPTY(VALUE("OpportunityId")),IF(VALUE("CustomerRef/FullName/CustomerRet/CustomerTypeRef/FullName").equals("Retail"),"true","false"),"false")

Here "Retail" is the customer type we can change according to our requirement.

4th RULE: SF UPSERT OPPORTUNITYITEM

VALIDATE ROW:

IF(ISEMPTY(VALUE("OpportunityId")),IF(VALUE("CustomerRef/FullName/CustomerRet/CustomerTypeRef/FullName").equals("Retail"),"true","false"),"false")

Here “Retail” is the customer type we can change according to our requirement.

Now invoices will sync of customer type “Retail”