ChannelAdvisor & QuickBooks Bidirectional Integration

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Overview

DBSync for ChannelAdvisor & QuickBooks integration template is an easy to use integration solution. It seamlessly integrates ChannelAdvisor Channel, Products and Order with QuickBooks Customer, Items, Order, Invoice and vice-versa. DBSync provides bi-directional sync between ChannelAdvisor and QuickBooks with the pre-built field-to-field mappings along with flexibility for more complex and dynamic mapping capabilities. DBSync's automatic online updates enable customers to enjoy all the product updates, and features, effortlessly with every new release.

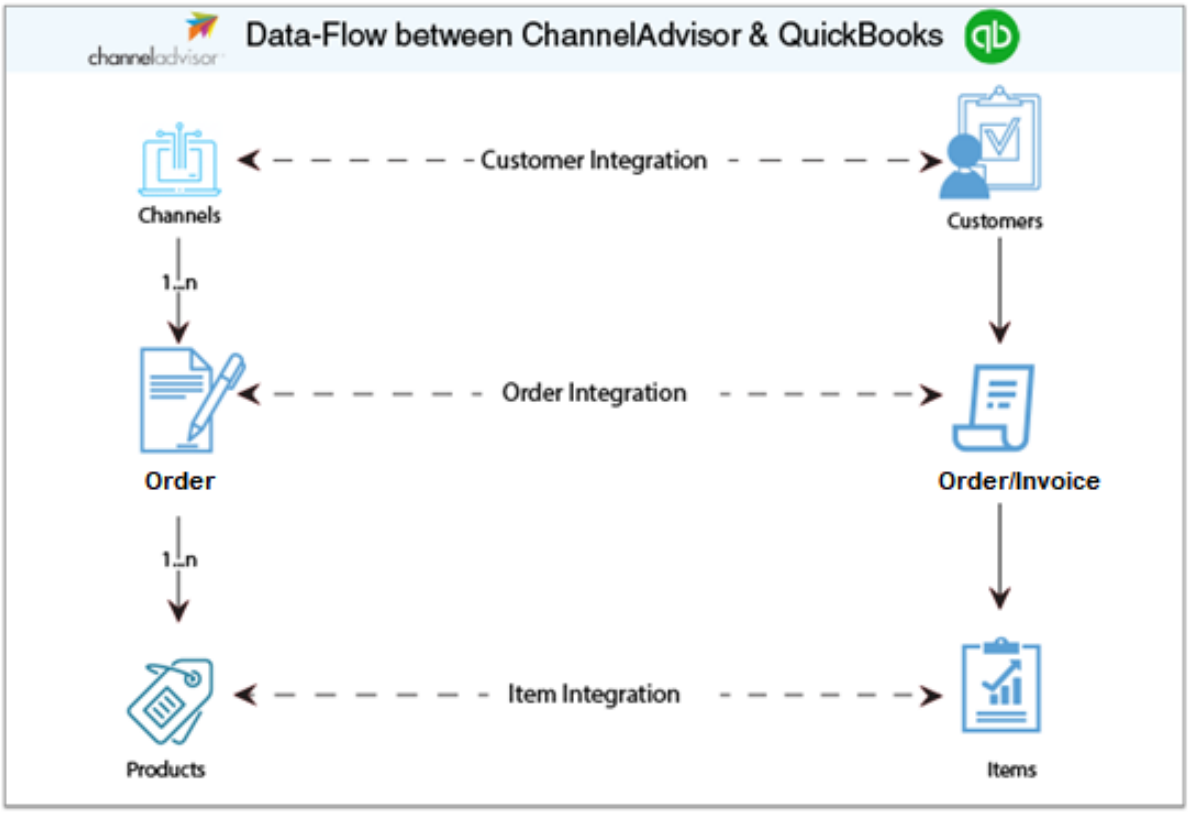
Data Flow

The data flow of bidirectional integration between ChannelAdvisor & QuickBooks is shown in the table below.

ChannelAdvisor		QuickBooks
Channels	⟷	Customers
Product	⟷	Items
Order	⟷	Order/Invoice

Process Map

The process map of bidirectional integration between ChannelAdvisor & QuickBooks is shown in the image below.



The template of ChannelAdvisor and QuickBooks comes as one project. However, for a better explanation, the data flow is broken down into two sections:

1. **Data flow from ChannelAdvisor to QuickBooks:** This section explains the data flow from ChannelAdvisor to QuickBooks platform. The information is segmented based on readers' persona. This will reduce clutter and help readers better understand the integration requirements. As a result, readers should be able to configure templates without any help from the DBSync support team.
    a. **Channel Integration**: The customer integration data flow constitutes retrieving data from the Channel object of ChannelAdvisor and integrating it with QuickBooks as customers.
    b. **Contact Integration**: The Order integration data flow constitutes retrieving data from the Order object of ChannelAdvisor and integrating it with QuickBooks Orders and Invoices.
    c. **Product Integration**: The product integration data flow constitutes retrieving data from the Product object of the ChannelAdvisor and integrating it with QuickBooks as Items.
2. **Data flow from QuickBooks to ChannelAdvisor:** This section explains the data flow from the QuickBooks platform to ChannelAdvisor. The information is segmented based on readers' persona. This will reduce clutter and help readers better understand the integration requirements. As a result, readers should be able to configure templates without any help from the DBSync support team.
    a. **Customer Integration**: The customer integration data flow constitutes retrieving data from the Customer object of QuickBooks and integrating it with ChannelAdvisor as Channels.
    b. **Contact Integration**: The contact integration data flow constitutes retrieving data from the Contact object of QuickBooks and integrating with it ChannelAdvisor as Contacts.
    c. **Item Integration**: The item integration data flow constitutes retrieving data from the Item object of QuickBooks and integrating it with the ChannelAdvisor as Products.
    d. **Invoice Integration:** The Invoice integration data flow constitutes retrieving data from the Invoice object of QuickBooks and integrating it with the ChannelAdvisor as Orders.

ChannelAdvisor and QuickBooks - Field Mapping

channeladvisor		quickbooks
Channels		**Customer**
Channel		Name
Billing Address		Billing Address
Shipping Address		Shipping Address
Order Header		**Invoice Header**
Customer Name		Customer Name
Order Number		Invoice Number
OrderDate		Invoice Date
-		Due Date
-		Shipping Date
Billing Address		Biling Address
Shipping Address	→	Shipping Address
		-
Order Lines		**Invoice Lines**
-		-
OpportunityLineItem Product		Tansaction Item Nam
OpportuntyLine Item Unit Price		Transaction Item Rat
OpportunityLineItem Quantity	←	Transaction Item Quan
Opportunity Line Description		Transaction Line Descrip
Products		**Items**
Product Name		Item Name
Product Description		Item Description
SKU		**Item Types (service, Inventc**
Price		Sales Price

Prerequisites For Integration

To facilitate the data flow between ChannelAdvisor and QuickBooks, a user has to do the following:

- Have a valid license to DBSync QuickBooks and ChannelAdvisor connector.
- Have a valid username, password, Account ID and Application ID to access QuickBooks web service.
- Have a valid username, password of the ChannelAdvisor Production instance.
- The connections must be rightly configured to the respective applications via the connector page of this standard template provided by DBSync.

Getting Started With DBSync

1. Go to www.mydbsync.com & register for Free Trial. Ensure that Source & Target Adapters are ChannelAdvisor & QuickBooks respectively. Populate the registration form to complete registration.
2. An email will be triggered from dbsync-notification@mydbsync.com to the registered Email ID. Click on the activation link to activate your DBSync account.
3. Login to your DBSync account, click on the template library and import the ChannelAdvisor & QuickBooks - Bidirectional Integration template to your workspace.
4. Clicking on "Launch Development studio" will redirect the user to connectors landing page. Configure ChannelAdvisor and QuickBooks connectors respectively by following the steps listed in the link QuickBooks Connector.
5. Now, run the integration by following the steps listed in the following section - "Running The Integration".

Running The Integrations

DBSync integration of ChannelAdvisor & QuickBooks can be triggered by:

1. Clicking on the "Run Now" button from the process listing page of DBSync.
2. Using "DBSync scheduler".

Clicking "Run Now" button from DBSync platform

The user has to login to DBSync with his/her valid credentials and hit the "Run Now" button from the process listing page or from the workflow listing page.

Using DBSync Scheduler

- Scheduler available in DBSync account can be used to schedule the integrations. Details pertaining to usage of DBSync scheduler is available from, http://help.mydbsync.com/docs/display/dbsync/Scheduler, link.