

Salesforce to QuickBooks Desktop Custom Field Integration on Customer/Vendor

Issue: Salesforce Custom field to QuickBooks Custom field.

Root Cause: Requirement on mapping Quickbooks desktop Custom field on Customer entity.

Solution:

Let's go through a use case where we have to sync a Salesforce Standard/Custom field to QuickBooks Custom field on either Customer/Vendor entity.

We have a field "Client Name" created in Salesforce. The field has to be synced to a Custom field "CLIENT NAME" in QuickBooks desktop under Customer.

The screenshot shows the 'Client Detail' form in QuickBooks Desktop. At the top, there are buttons for 'Edit', 'Delete', and 'Clone'. The form contains the following fields:

Client Name	Jennifer
Orders	\$25
ProductName	QuickBooksAdapter
ClientEmail	jennifer@sfdc.com
Phone	458256521
TotalBill	\$25,000
Created By	Sujay R.S. 7/22/2015 1:39 PM

At the bottom of the form, there are again buttons for 'Edit', 'Delete', and 'Clone'.

- Create Custom field in QuickBooks by clicking Edit-> Define fields under Additional info tab on the Customer layout as shown below:

The screenshot shows the 'Customer' form in QuickBooks Desktop. At the top, there is a text field for 'CUSTOMER NAME' with the value 'doctor'. Below it, it says 'CURRENT BALANCE 0.00' and a link 'How do I adjust the current balance?'. On the left side, there is a sidebar with tabs: 'Address Info', 'Payment Settings', 'Sales Tax Settings', 'Additional Info' (which is selected), and 'Job Info'. In the main area, under the 'Additional Info' tab, there are two dropdown menus: 'CUSTOMER TYPE' and 'REP'. To the right of these is a section titled 'CUSTOM FIELDS' which contains a text field labeled 'CLIENT NAME'. At the bottom right of the form, there is a button labeled 'Define Fields'.

- Login into mydbsync.com using your DBSync credentials.
- Create a rule under the desired workflow. Select the target as DataExt and perform Mapping and Writer as Follows:

Mapping Screen

DataExtModRq (Target) Auto Match

VALIDATE ROW

(DataExtModRq) Loop Over Select Field

☒ DataExtMod Loop Over Select Field

DataExtName

DataExtValue

ListDataExtType

☒ ListObjRef Loop Over Select Field

Validate Loop

FullName

ListDataExtType

☒ ListObjRef Loop Over Select Field

Validate Loop

FullName

ListID

OtherDataExtType

OwnerID

TxnDataExtType

TxnID

TxnLineID

- Mapping

Seq 1: Client Name in Salesforce to Client Name in QuickBooks:

DataExtModRq/DataExtMod/DataExtName	=	"Client Name"
DataExtModRq/DataExtMod/DataExtValue	=	VALUE("Client_Name__c")
DataExtModRq/DataExtMod/ListDataExtType	=	"Customer"
DataExtModRq/DataExtMod/ListObjRef/FullName	=	VALUE("Name")
OR		
DataExtModRq/DataExtMod/ListObjRef/ListID	=	VALUE("newid")
DataExtModRq/DataExtMod/OwnerId	=	"0"
VALIDATEROW	=	"true"

Explanation of the above mappings:

- DataExtName is the name of the Custom field in QuickBooks.
- DataExtValue is the value of the Salesforce field.
- ListDataExtType is the name of an entity in QuickBooks where the Custom field is added.
- ListObjRef/FullName or ListObjRef/ListID are the reference fields in QuickBooks. We can use either of the mappings.

OwnerId has defaulted to 0.