

Opportunity Name is changing when the sync is completed

Issue: Opportunity name is changing in Salesforce after the sync gets completed.

Reason: The "OpportunityId" field will not be present in the Invoice layout in QuickBooks, hence the Opportunity name will change in Salesforce when the sync runs.

The screenshot shows a QuickBooks invoice interface. At the top left, it says "Invoice" with a "See History" link and "PAST DUE" in red. On the right, there are fields for DATE (06/07/2019), BILL TO (1111), and SHIP TO (1111). Below these are fields for INVOICE # (54), P.O. NO., TERMS, OPPORTUNITYID (005000001G3...), and DESC. The OPPORTUNITYID field is circled in blue. At the bottom, there is a table with columns: ITEM, DESCRIPTION, QUANTITY, RATE, SFLINEID, CLASS, and AMOUNT. The table contains two rows: "SLAGold" with quantity 6 and amount 180,000.00, and "askdesidop" with quantity 5 and amount 1,170.00.

Solution:

1. Open any random Invoice in QuickBooks.
2. Click on Formatting. (refer the attachment)
3. Click on Customize Data Layout. (refer the attachment)
4. In the Header section, checkmark the checkbox which is in front of OpportunityId.
5. Click ok.

The screenshot shows the QuickBooks Formatting menu. The "Formatting" tab is selected and highlighted with a blue circle. Below it, the "Customize Data Layout" option is also highlighted with a blue circle. Other options in the menu include Preview, Manage Templates, Download Templates, Spelling, Insert Line, Delete Line, Copy Line, Paste Line, and Custc Desi. Below the menu, there are fields for CUSTOMER_JOB and CLASS.

Once the above steps are completed make sure that the OpportunityId field is populated in the Invoice layout.