

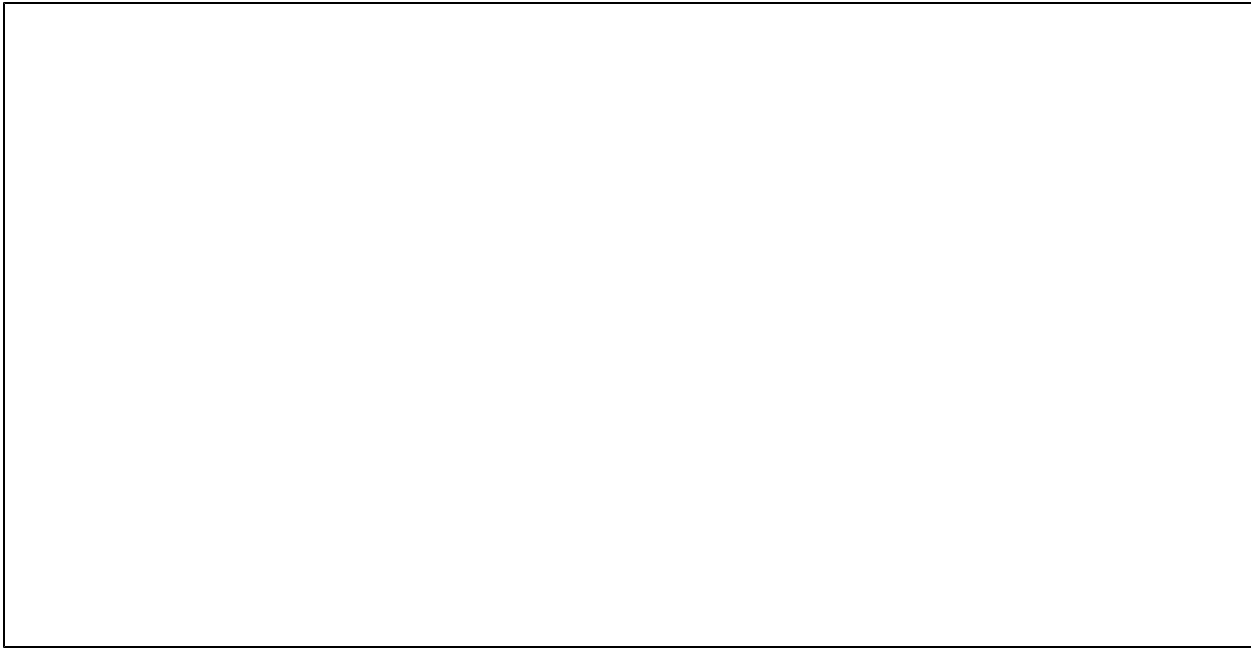
Deposits from QuickBooks as Opportunity in Salesforce

Opportunities falling under the wrong account

Issue

The Deposits from QuickBooks are synced as Donations(Opportunity) into Salesforce. The Donations are attached under the wrong account due to the mapping issue.

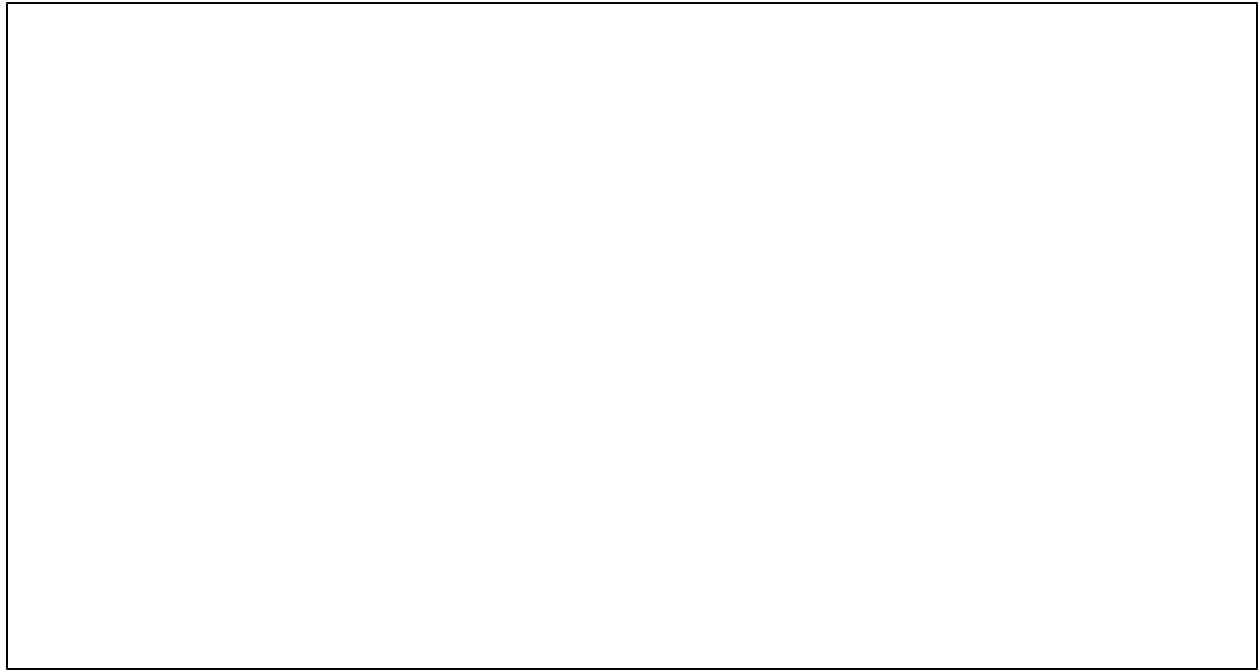
Navigate here to open mapping for Upsert opportunity.



Step 1:

- Navigate to upsert opportunity mapping.
- Under the opportunity, mapping finds the AccountID field as shown in the picture below.

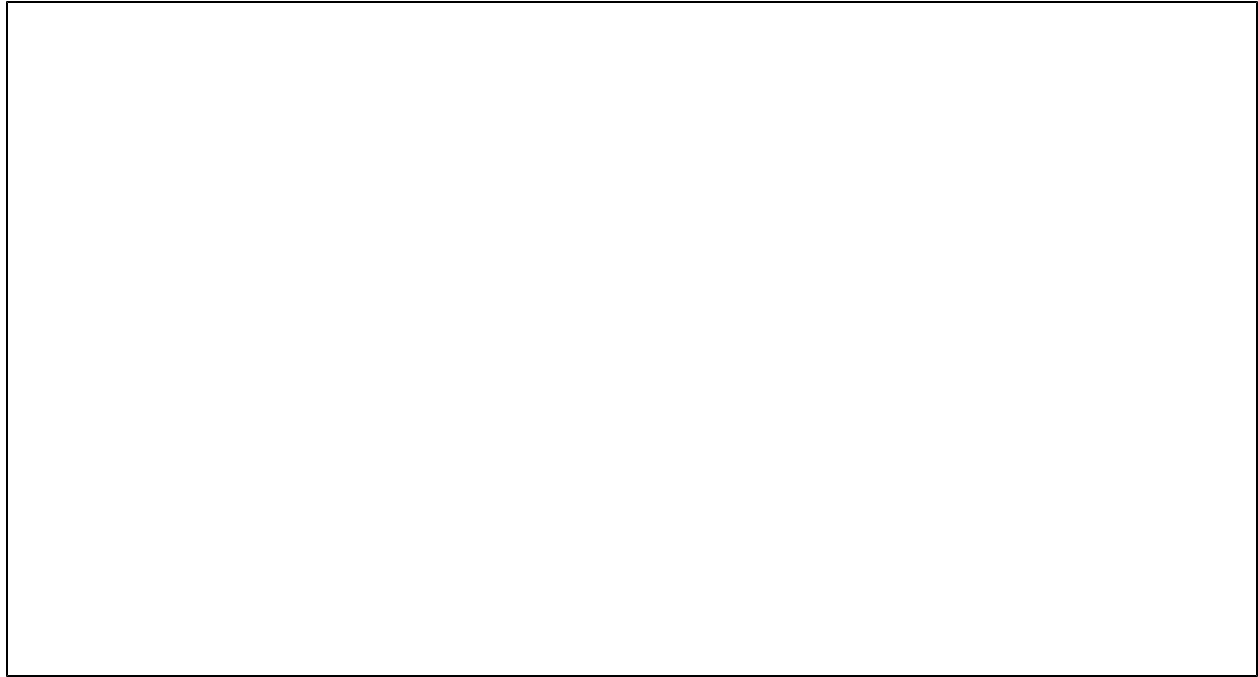
Present Mapping: LOG(TLOOKUP("select Id from Account where AVSFQB__Quickbooks_Id__c="+LOG(VALUE("CustomerRef/ListID"))+""))

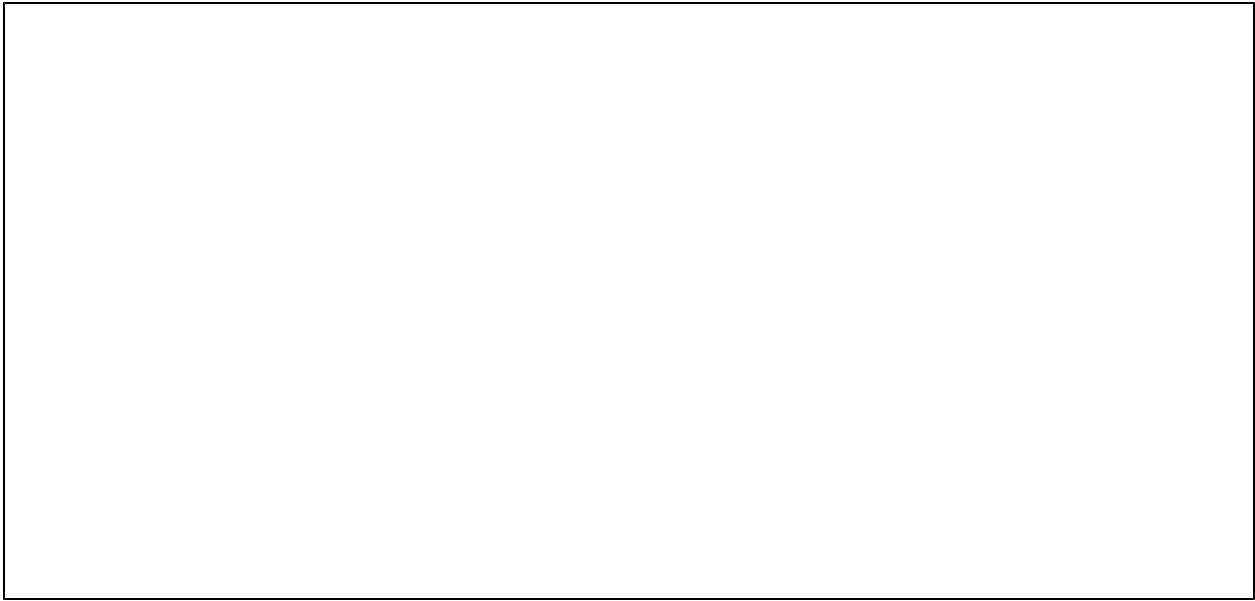


Step 2:

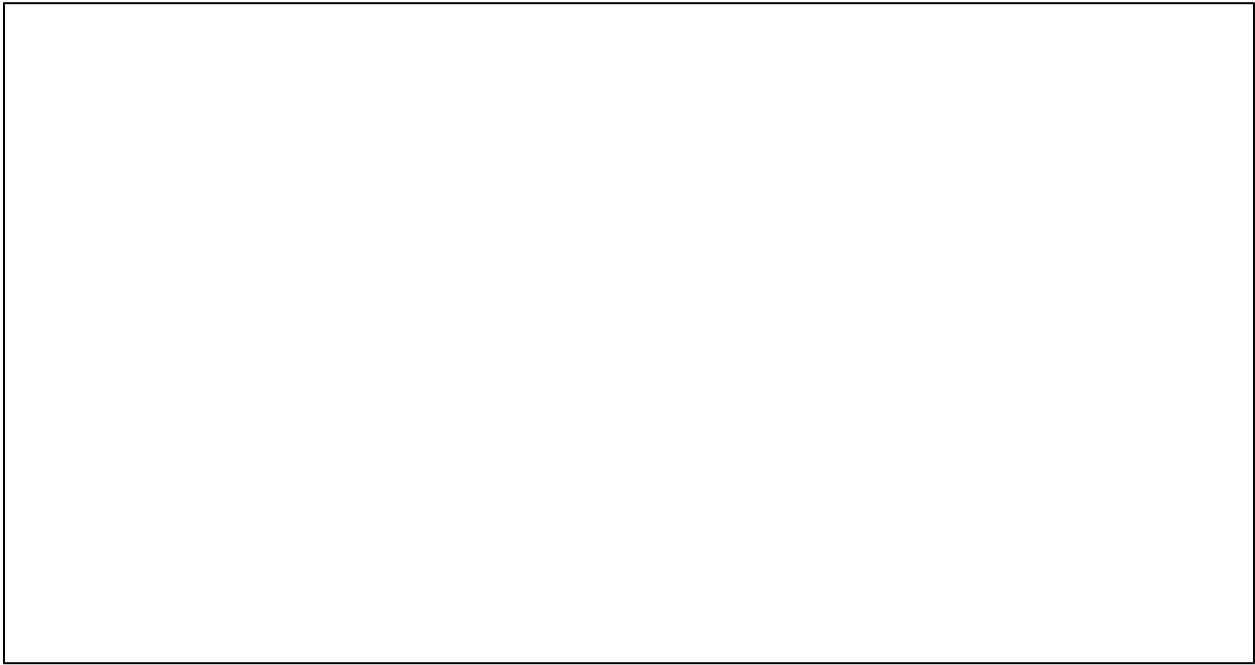
- Make the necessary changes in the mapping of AccountId.
- Below is the correct mapping. Further, save the changes.

Changed Mapping: LOG(TLOOKUP("select Id from Account where AVSFQB__Quickbooks_Id__c="+LOG(VALUE("EntityRef/ListID"))+""))





Also, make sure that the QuickbooksID field mapping is appropriate in the upsert Account.



QuickboksID mapping: VALUE("EntityRef/ListID")