

Standard QuickBooks Desktop Group Line item Syncs

This section illustrates how Group Line items are handled by DBSync for Salesforce and QuickBooks Desktop integration. There can be two scenarios for Group Line item sync from Salesforce to QuickBooks Desktop.

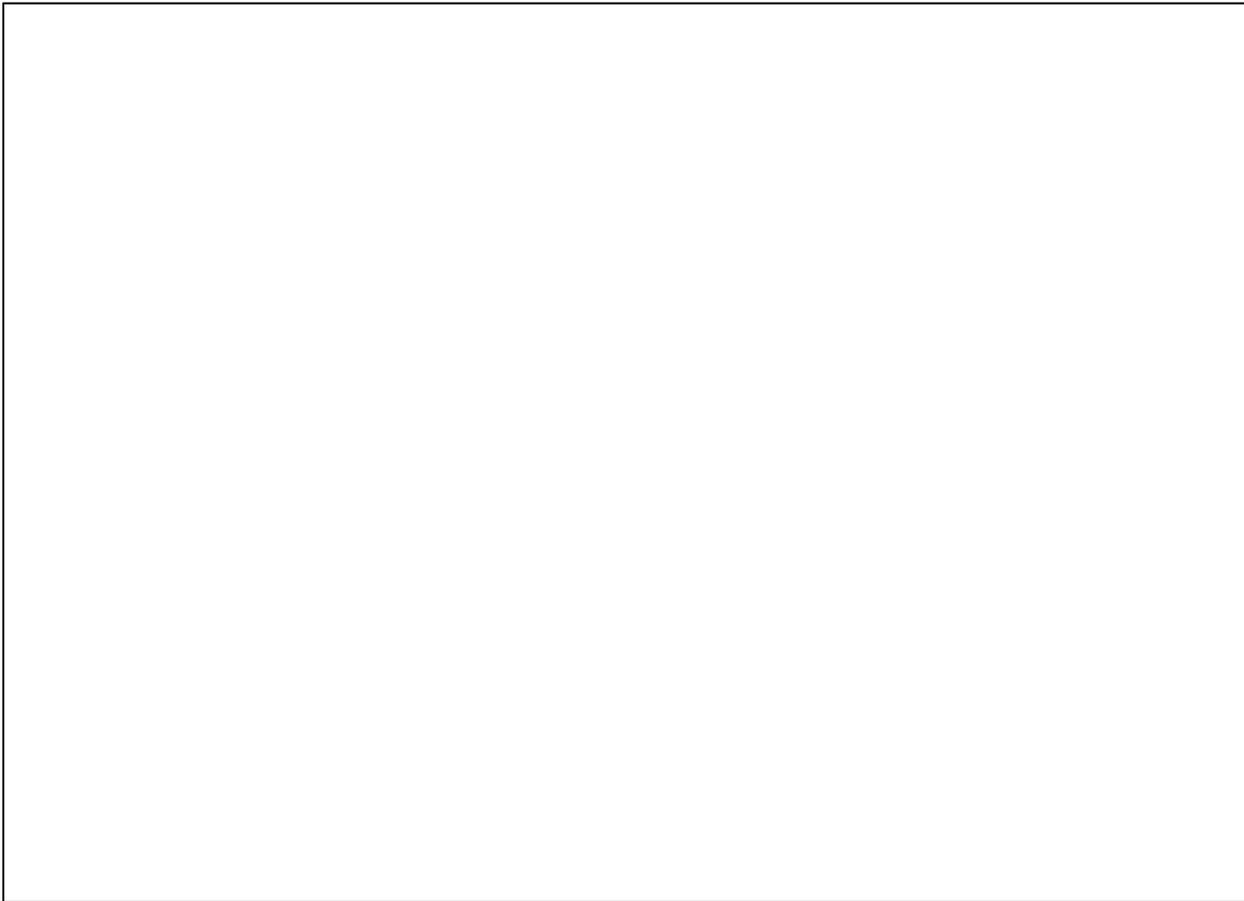
An opportunity can have all the Opportunity lines as Group Items **OR** (It can be a combination of Standard Items and Group Items).

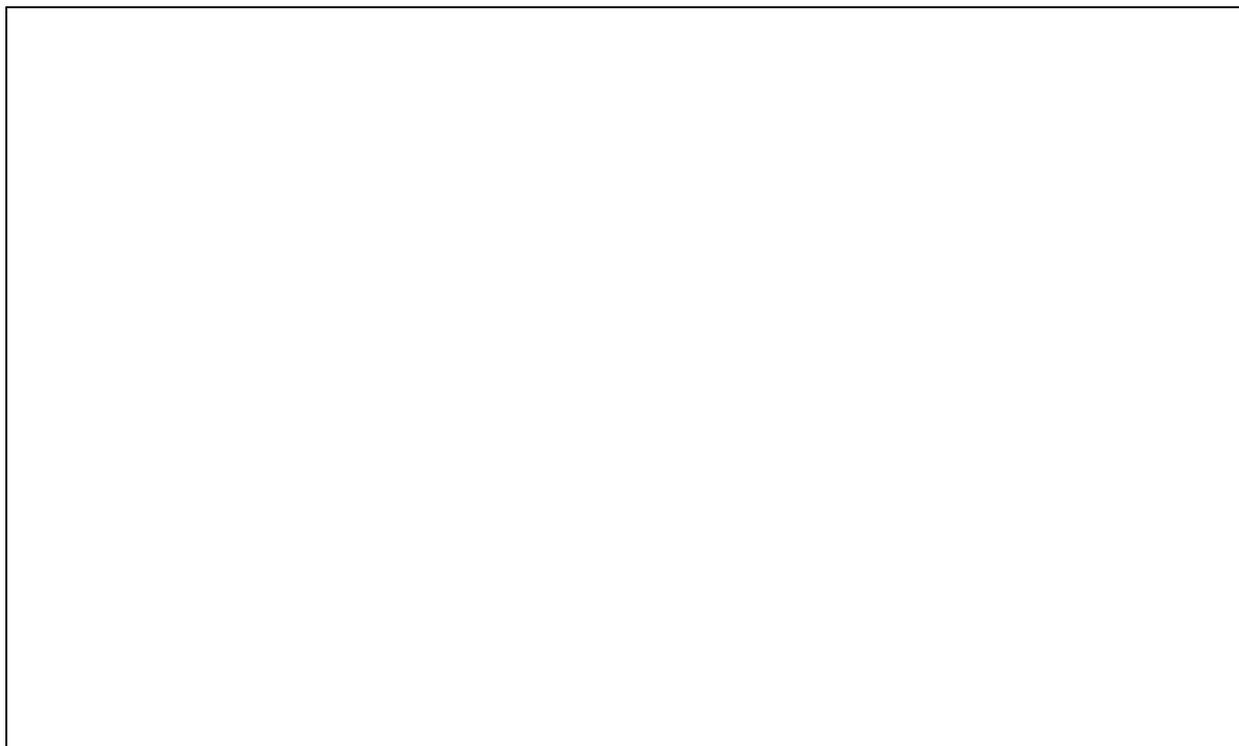
Scenario1: All line items are group items

If a user wants to integrate all the Line items in Salesforce as Group Line item in QuickBooks then they can make changes in the transaction (Invoice, Salesorder, Estimate) mapping. Below are the steps.

1. Go to DBSync transaction mapping and look for SalesOrderLineGroupAdd in QuickBooks schema.
2. Put a loop over on the SalesOrderLineGroupAdd field.
3. Required mappings are ItemGroupRef, Desc, Quantity.
 - User can put a loop over on SalesOrderLineGroupAdd=OpportunityLineitems/records
4. Remove the loop over from SalesOrderLineAdd and all the existing mapping under SalesOrderLineAdd.
5. Save the mapping and save the workflow.

When syncing the transaction in QuickBooks if the group product name matches with the request sent from Salesforce line items. It will refer to the Group Items in QuickBooks and SalesOrder Transaction will be created in QuickBooks.





Note: From the above scenario/process, It is not possible to pass/assign the Salesforce UnitPrice to QuickBooks Line Rate.

Scenario 2: Standard Line item or Group Line item for a few transactions

If a user wants to Sync transactions using DBSync where they have Individual products and Group Products part of their line items in Salesforce item for few, below are the steps.

- A. Create a filter on the Salesforce product to determine if a line item is a group or individual. It can be done by creating a picklist to identify the Product.
- B. Create a separate workflow for Group Lineitem Transaction sync.
- C. Follow the steps mentioned in the above as Scenario 1.
- D. For individual and Group Lineitem apply the filter in the mapping validate row to segregate the group and individual lineitem.

Note: the above scenario will create two invoices in QuickBooks, one for Group items and One for Individual Items from Salesforce Opportunity.