

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.

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

Edit Delete Clone

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

CUSTOMER NAME

CURRENT BALANCE 0.00 [How do I adjust the current balance?](#)

Address Info

Payment Settings

Sales Tax Settings

Additional Info

Job Info

CUSTOMER TYPE

REP

CUSTOM FIELDS

CLIENT NAME

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.