Multicurrency in Salesforce QuickBooks Online Integration

Integration from Salesforce to QuickBooks Online

- If multicurrency is enabled in Salesforce and QuickBooks then, we need to make some changes in DBSync settings and mappings to achieve seamless integration with MultiCurrency.

- Go to www.mydbsync.com and select Customer Login. Enter your Username and Password and click on Sign in. Click on Launch Development Studio, to launch the DBSync Project page.

- Ensure that Salesforce and QuickBooks connectors are validated. You should have process template SalesforceQuickBooks Online BiDirectional.

- Click on Projects then, select and open the relevant Project. You will see the available processes. Select and open the relevant Process. You will see a list of available Workflows.

- Open workflow SFQB_OpportunityToInvoice. Replace the reader query in the Advanced Query Builder with the following query and then, click on the Save & Close button.

Select
Opportunity.Id,Opportunity.AVSFQB__Primary_Contact__r.FirstName,Opportunity.AVSFQB__Primary_Contact__r.LastName,Opportunity.Owner.QB_SalesRep_ID__c, Opportunity.AVSFQB__Primary_Contact__r.Email,Opportunity.AVSFQB__QuickBooks_Id__c,Opportunity.AccountId,LastModifiedDate,Opportunity.Account.Id, Opportunity.Account.CurrencyIsoCode,Opportunity.Account.Name,Opportunity.Account.BillingStreet,Opportunity.Account.BillingCity, Opportunity.Account.BillingState,Opportunity.Account.BillingPostalCode,Opportunity.Account.BillingCountry,Opportunity.Account.ShippingStreet, Opportunity.Account.ShippingCity,Opportunity.Account.ShippingState,Opportunity.Account.ShippingPostalCode,Opportunity.Account.ShippingCountry, Opportunity.Account.Fax,Opportunity.Account.Phone,Name,Description,CloseDate ,(SELECT Quantity,UnitPrice,Description,Opportunity.owner.FirstName, Opportunity.owner.LastName,Opportunity.Id,Opportunity.CloseDate,PricebookEntry.Name,PricebookEntry.Product2.ProductCode,PricebookEntry.Product2.Name, PricebookEntry.Product2.Description,PricebookEntry.Product2.Id,PricebookEntry.UnitPrice,PricebookEntry.Product2.AVSFQB__QuickBooks_ItemType__c FROM OpportunityLineItems) ,Opportunity.Account.AVSFQB__QuickBooks_Id__c,Opportunity.AVSFQB__Generate_Object__c FROM Opportunity where Opportunity.AVSFQB__Generate_Object__c = 'Invoice'

- In the Rules section, you will see a list of 4 Rules. Open the map of the sequence no.1 Rule.

- Add the following mapping in the mapping window and click on the Save & Close button.

Notes	=	{
		ADDXML("<CurrencyRef>"+IF(VALUE("CurrencyIsoCode").equals("CAD"),"CAD",
		IF(VALUE("CurrencyIsoCode").equals("USD"),"USD",
		IF(VALUE("CurrencyIsoCode").equals("AUD"),"AUD",
		IF(VALUE("CurrencyIsoCode").equals("GBP"),"GBP","EUR"))))+"</CurrencyRef>");
		return "";
		}

- Now Open the map of the sequence no.2 Rule.
- Add the following mapping in the mapping window and click on the Save & Close button.

Notes	=	{
		ADDXML("<CurrencyRef>"+IF(VALUE("CurrencyIsoCode").equals("CAD"),"CAD",
		IF(VALUE("CurrencyIsoCode").equals("USD"),"USD",
		IF(VALUE("CurrencyIsoCode").equals("AUD"),"AUD",
		IF(VALUE("CurrencyIsoCode").equals("GBP"),"GBP","EUR"))))+"</CurrencyRef>");
		return "";
		}

- Now Open the map of the sequence no.4 Rule.
- Add the following mapping in the mapping window and click on the Save & Close button.

```
CurrencyRef = VALUE("CurrencyIsoCode")
```