

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

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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'
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- 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 ""; }
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- 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	=	<pre>{ 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 ""; }</pre>
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- 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")

