Account Hierarchy in Salesforce and QuickBooks

For Integration from Salesforce into QuickBooks

- If QuickBooks Customer and Salesforce Account object has hierarchy structures enabled, then the following changes have to be implemented within your DBSync mappings/template to facilitate hierarchy mappings.
- Let's say Avankia & DBSync are Parent & Child Account respectively in Salesforce. Also, Avankia & DBSync are the Customer & Job in QuickBooks respectively.
- The default mappings within DBSync standard template integrates the above Salesforce Account records as two separate Customer records **"Avankia"** and **DBSync"** - as opposed to Parent & Child records.
- Login to DBSync accounts with user credentials to make changes or create hierarchy mappings. Once the user has logged into his/her DBSync account, then click on the ***Development Studio*** *to go to the* DBSync Project page.
- Click on Projects page user will get a list of available projects and select the relevant project from the list.
- Users will get a list of available processes under the project section. Click on the relevant process to see a list of available workflows.
- Click on **Create New Workflow** and enter the workflow name **AccountToCustomer2** and Save.
- After Creating the workflow '**AccountToCustomer2'**, move this next to the '**AccountToCustomer'** workflow.
- Open the '**AccountToCustomer2'** workflow to add Trigger and Rule properties from the '**AccountToCustomer'** workflow.
- Once all the properties are filled, copy all the mappings from the '**AccountToCustomer'** mapping page.
- Once the mappings are completed, add the following changes in the "Mapping page".

```
Target == "CustomerAddRq/CustomerAdd/ParentRef/FullName"
Source Field == "VALUE("Parent/Name")"
```

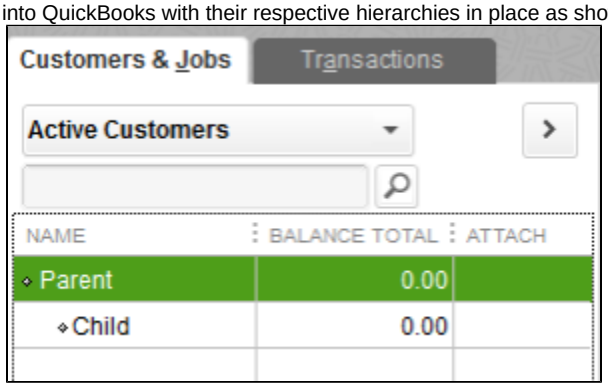
- Now use the following query in '**AccountToCustomer2'** Trigger using Advanced Query Builder.

```
select {!.} from Account where AVSFQB__QuickBooks_Id__c = '' and
Parent.Name!=''
```

- Similarly, replace '**AccountToCustomer'** query with the query below:

```
select {!.} from Account where AVSFQB__QuickBooks_Id__c = '' and
Parent.Name =''
```

- Once the user is done with all the above-mentioned changes, then "initiate the integration through web connector". Data will be integrated into QuickBooks with their respective hierarchies in place as shown below:



- This concludes Account hierarchy mappings for the data-flow from Salesforce into QuickBooks.