

Salesforce Opportunity to QuickBooks - Disabling Jobs

- [Salesforce & QuickBooks BiDirectional Template](#)
- [Salesforce & QuickBooks Online Template](#)

Salesforce & QuickBooks BiDirectional Template

- Go to www.mydbsync.com. Click on **Customer Login**. Enter your **Username** and **Password**. Then, click on **Sign in**. Click on **Launch** to access Development Studio.
- **Validate** your connection settings for Salesforce and QuickBooks.
- Go to workflow **Opportunity to invoice**. In the Rules section, open the map for Sequence No.2. Then, replace the mapping of VALIDATE ROW from **"true" to "false"**.
- After making the above changes, DBSync will not create jobs in your QuickBooks.
- The above procedure can be replicated for other mappings - like OpportunityToSalesOrder, OpportunityToSalesReceipt, OpportunityToEstimate and OpportunityToCreditMemo.
- Open mapping for **sequence/rule no. 6** and make the following changes to the source and target mappings.
- Find the target field **"InvoiceAddRq/InvoiceAdd/CustomerRef/FullName"** and replace the source code by copy and paste the following: `LEFT(VALUE("Account/Name"),41)`
- Open Mapping for **sequence/rule no. 8** and make the following changes to the source and target mappings.
- Find the target field **"InvoiceModRq/InvoiceMod/CustomerRef/FullName"** and replace the source code by copy and paste the following: `LEFT(VALUE("Account/Name"),41)`

Salesforce & QuickBooks Online Template

- Go to www.mydbsync.com. Click on **Customer Login**. Enter your **Username** and **Password**. Click on **Sign in**. Click on **Launch** to access the Development Studio.
- **Validate** your connection settings for Salesforce and QuickBooks Online.
- Go to process **SFQB_OpportunityToInvoice**. Open the workflow OpportunityToInvoice. Then, open the map for **Sequence No.2** and replace the mapping of VALIDATE ROW from **"true" to "false"**.
- Open mapping for **Sequence No 4** and make the following changes to Source and Target Mappings.
- Find the target field **"CustomerRef"** and replace the source code by copy and paste the following:

```
IF( ISEMPTY((String)SESSION_GET("CreateJobFlag")), LEFT(VALUE("Account/Name"),41),  
LEFT(VALUE("Account/Name"),41)+": "+ LEFT(VALUE("Name"),41))
```

- This completes disabling Jobs for your Salesforce and QuickBooks Online solution template.