## DBSync package (QuickBooks Integration) Installation in Salesforce\_

Click on the below link to install the DBSync App from AppExchange

https://login.salesforce.com/?startURL=%2Fpackaging%2FinstallPackage.apexp%3Fp0%3D04t600000001gWU&crc=1.

- Enter your Salesforce Username and Password to install DBSync Package in that Salesforce instance. The Salesforce instance must have the administrative privileges to install App.
- DBSync Package Installation Details will be displayed in your Salesforce instance. Click on 'Continue'.

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System Overview	Pu	iblisher Avankia			
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App Setup	-		Contin	Cancel	
Customize	Package Componen	165			
Create	<ul> <li>Tabs (1)</li> </ul>				
Develop	Action	Component Name	Parent Object	Component Type	Installation Notes
Schema Builder	Update	Invoice		Tab	This is an upgraded component. It will be updated to the new version

• Approve Package API Access and then click on 'Next'.

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Quick Find Q, Expand Al   Collapse Al	Package Installer QuickBooks Integration	Help for this Page 😝
Force.com Home	Step 1. Approve Package API Access	Step 1 of 3
System Overview Personal Setup	These settings control the access that s-controls and other components in this package have to standard and edit the package API access to standard objects after the package is installed from the package deta	$^{\rm d}$ objects via the APL The access will still be constrained by the user's profile. You can view if pape $\underline{\rm Tell}$ ma more
Infy Personal Information     Email     Import     Desktop Integration	Package Custom Objects This Package will have the user's access (via the API) to all Custom Objects in your Organization. Extended Object Permissions	
My Chatter Settings     My Social Accounts and Contacts     App Setup	Read Create Edit Delete Accounts I I I I Assets I I I I	Read Create Edit Delete
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Administration Setup  Manage Users Manage Apps Company Profile Security Controls Domain Management Communication Templates	General User Permissions This Package will be able to use all of the General User Permissions from the user's Profile. Administrative Permissions This Package will be able to use all of the Administrative Privileges from the user's Profile.	Rext Cancel

• Choose Security Level to Grant Access and then click on 'Next'.

## dbsync Search. Search Vishwanath Bomma... \* Help QuickBooks Integration Home DbSync Setup Accounts Opportunities Products Invoice Reports Dashboards DBSync Batch Process + Quick Find Q, Package Installer Help for this Page 😡 Expand Al | Collegee Al Force.com Home Step 2. Choose security level System Overview Select security settings: Grant access to admins only Users with your profile get full access (best for limited deployments) Personal Setup Grant access to all users All internal custom profiles get full access Ity Personal Information Select security settings User access set by profile (recommended for most packages) Email Import Previous Next Desktop Integration Ity Chatter Settings

• Package is ready to be installed. Click Install to 'install'.

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Force.com Home	Step 3. Install Package		Step 3 of 3
System Overview	The package is ready to be installed. Click Install to continue.		
Personal Setup			
My Personal Information     Email			Previous Install Cancel

• Install complete message will be displayed which confirms that DBSync Package is installed.

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Quick Find Q	Package Details QuickBooks Integrati	ion (Managed)		Help for this Page 😔
Force.com Home	Follow any remaining st	leps in the app install guide to complete deployment.		
System Overview	Installed Package Detail	Uninstall View Component	View Dependencies	
Personal Setup	Package Name	QuickBooks Integration	Version Number	1.19
	Language	English	First Installed Version Number	1.19
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Ity Social Accounts and Contacts	Installed By	Vishwanath Bommalapur, 5/24/2013 9:24 AM		

•	Go to setup
	Customize
	Account
	Page Layout
	Edit the Page

- the Page Layout. Under the Page Layout drag the fields specified below to add it in Page Layout and Save.
  Fields: "Quickbooks Id", "QuickBooks Error"
  Button: "Update Account To QuickBooksOE"

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- Go to setup Customize Contact 'Page Layout Edit the Page Layout.
- Under the Page Layout drag the fields and buttons specified below to add it in Page Layout and Save.
  Fields: "Quickbooks Id", "QuickBooks Error", "QuickBooksName"
  Button: "Update Contact To QuickBooksOE"

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	♥ DBSync Quickbooks Id	Edit Delete Clone Reg	GBlame GB Error west Update   Update Contact to GB0E	Jack Rogers-Burlington Textiles Corp of America

 New Buttons "Update Opportunity To QuickBooksOE\_New" and "Update Invoice from QuickBooksOE\_New" should be created in Salesforce Opportunity by referring the below steps.

Go to setup Customize Opportunity 'Buttons, Links and Actions' 'Button or Link. Enter the below mentioned details and save to create two buttons. Label: Update Opportunity To QuickBooksOE\_New Behavior: Execute JavaScript Display Type: Detail Page Button OnClick JavaScript: var URL="{

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\$User.AVSFQuickBooks\_DBSync\_Idc}&profileName={

!\$User.AVSFQuickBooks\_\_DBSync\_Profile\_\_c\}&sessionId=\{!

\$Api.Session\_ID}&dbsyncPasswd={!\$User.AVSFQuickBooksDBSync\_Passwd\_c}"; window.open(URL,"DBSync","menubar=0,resizable=0,width=650,height=300");

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App Setup Customize	Created By	Vishwanath Bommalagur, 2/27/2014 8:07 AM Edit Delete Where is this used?	Modified By <u>Vishwanath Bommalagur</u> , 2/27/2014 11:44 AM

Label: Update Invoice from QuickBooksOE\_New Behavior: Execute JavaScript Display Type: Detail Page Button OnClick JavaScript: var URL="{

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\$Api.Partner\_Server\_URL\_140}&QuickBooksoeCT={

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!\$User.AVSFQuickBooks\_\_DBSync\_Profile\_\_c\}&sessionId=\{!

\$Api.Session\_ID}&dbsyncPasswd={!\$User.AVSFQuickBooksDBSync\_Passwd\_c}"; window.open(URL,"DBSync","menubar=0,resizable=0,width=650,height=300");

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• These new buttons along with the other required fields should be included in the page layout by following the below steps.

## Go to setup Customize Opportunity 'Page Layout' Edit the Page Layout.

- Under the Page Layout drag the fields specified below to add it in Page Layout.
  Fields: "Quickbooks Id", "Primary Contact", "Generate", "QuickBooks Error"
  Buttons: "Update Opportunity To QuickBooksOE\_New", "Update Invoice from QuickBooksOE\_New"

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• Move Invoices from the Opportunity Related List to the page layout.

• Click on Invoices in the Related List Section and hit "edit properties" button. Select columns as Invoices, Invoice number, Total Invoice Amount, Payments, Balance, Days Outstanding, and Transaction Date. Save the opportunity 'page layout'.

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Go to Setup

Customize Opportunity Opportunity Products

Edit Page Layout to move 'QuickBooksID' field to the page layout.

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• New Button "Update Product To QuickBooksOE\_New" should be created in Salesforce Product by referring the below steps.

Go to setup

Customize Product 'Buttons and Links' 'Button or Link. Enter the below mentioned details and save to create two buttons. Label: Product To QuickBooksOE\_New Behavior: Execute JavaScript Display Type: Detail Page Button OnClick JavaScript: var URL ="{

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\$User.AVSFQuickBooksDBSync\_Passwd\_c}"; window.open(URL,"DBSync","menubar=0,resizable=0,width=650,height=300");

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Product

'Page Layout' fields to add is "QuickBooks Item type", "QuickBooks Id", "QuickBooks Error", "COGS" and "OnHand" and Buttons
 "Update Product To QuickBooksOE\_New" to the page layout.

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