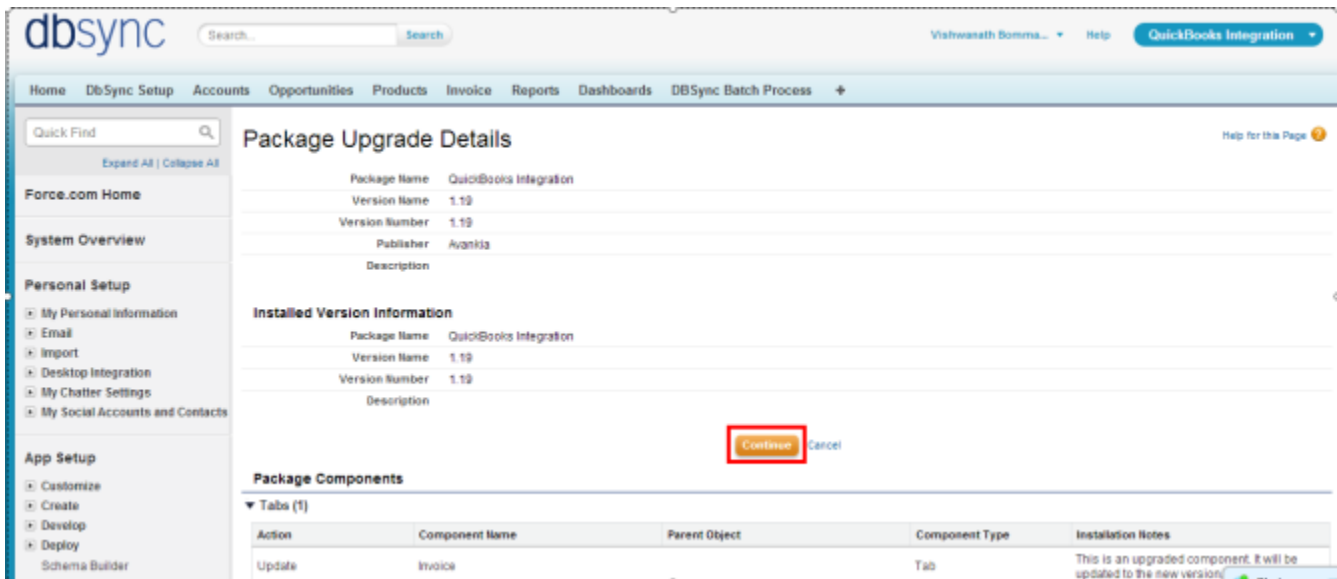


DBSync package (QuickBooks Integration) Installation in Salesforce_

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

<https://login.salesforce.com/?startURL=%2Fpackaging%2FinstallPackage.apexp%3Fp0%3D04t600000001gWU&rc=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'.



- Approve Package API 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 Expand All Collapse All

Force.com Home

System Overview

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration
- My Chatter Settings
- My Social Accounts and Contacts

App Setup

- Customize
- Create
- Develop
- Deploy
- Schema Builder
- Canvas App Previewer

Installed Packages

- AppExchange Marketplace
- Critical Updates

Administration Setup

- Manage Users
- Manage Apps
- Company Profile
- Security Controls
- Domain Management
- Communication Templates

Package Installer

QuickBooks Integration

Help for this Page

Step 1: Approve Package API Access Step 1 of 3

These settings control the access that s-controls and other components in this package have to standard objects via the API. The access will still be constrained by the user's profile. You can view and edit the package API access to standard objects after the package is installed from the package detail page. [Tell me more](#)

Package Custom Objects

This Package will have the user's access (via the API) to all Custom Objects in your Organization.

Extended Object Permissions

	Read	Create	Edit	Delete		Read	Create	Edit	Delete
Accounts	✓	✓	✓	✓	Leads	✓	✓	✓	✓
Assets	✓	✓	✓	✓	Opportunities	✓	✓	✓	✓
Campaigns	✓	✓	✓	✓	Price Books	✓	✓	✓	✓
Cases	✓	✓	✓	✓	Products	✓	✓	✓	✓
Contacts	✓	✓	✓	✓	Push Topics	✓	✓	✓	✓
Contracts	✓	✓	✓	✓	Quotes	✓	✓	✓	✓
Documents	✓	✓	✓	✓	Solutions	✓	✓	✓	✓
Ideas	✓	✓	✓	✓					

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.

Next 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 Expand All Collapse All

Force.com Home

System Overview

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration
- My Chatter Settings

Package Installer

QuickBooks Integration

Help for this Page

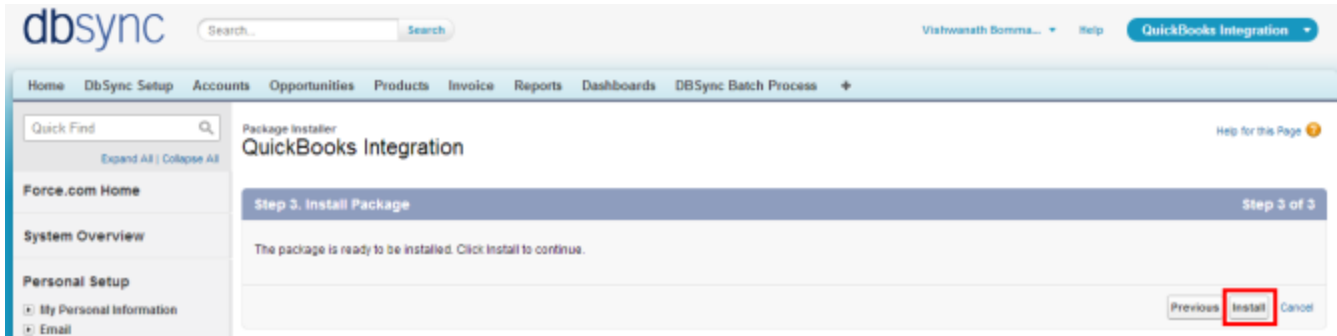
Step 2: Choose security level Step 2 of 3

Select security settings:

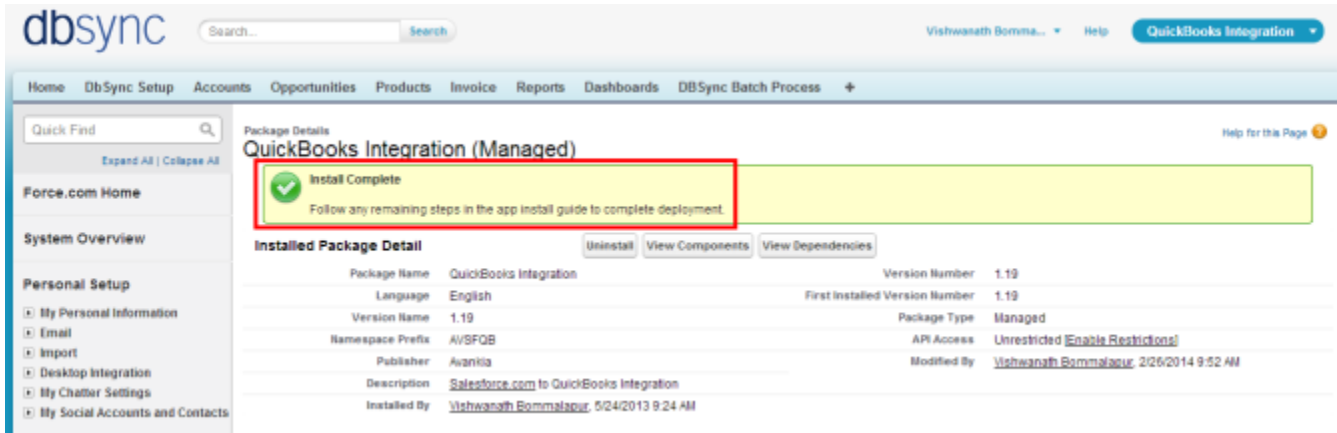
- ☒ Grant access to admins only Users with your profile get full access (best for limited deployments)
- ☐ Grant access to all users All internal custom profiles get full access
- ☐ Select security settings User access set by profile (recommended for most packages)

Previous Next Cancel

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



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



- Go to setup



Customize



Account



'Page Layout'



Edit 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"

dbsync Search... Search

Vishwanath Bomma... Help QuickBooks Integration

Home DbSync Setup Accounts Opportunities Products Invoice Reports Dashboards DBSync Batch Process +

Create New...

Recent Items

- GenePoint
- Avantra
- Jack Rogers
- DBSync21
- DBSync1
- 0000000034

Recycle Bin

GenePoint

Show Feed

Contacts (2) | Opportunities (3) | Cases (2) | Open Activities (2) | Activity History (2) | Notes & Attachments (2) | Partners (2) | dff (2)

Account Detail

Edit Delete Include Offline Update Account To QBOE

Account Owner	Vishwanath Bommalapur Change	Rating	Cold
Account Name	GenePoint View Hierarchy	Phone	(650) 867-3455
Parent Account		Fax	(650) 867-9895
Account Number	CC979213	Website	http://www.genepoint.com
Account Site		Ticker Symbol	
Type	Customer - Channel	Ownership	Private
Industry	Biotechnology	Employees	265
Annual Revenue	\$30,000,000	SIC Code	3712
Billing Address	345 Shoreline Park Mountain View, CA 94043 USA Mountain View, CA	Shipping Address	345 Shoreline Park Mountain View, CA 94043 USA
Customer Priority	Low	SLA	Bronze
SLA Expiration Date	11/27/2012	SLA Serial Number	7324
Number of Locations	1	Upsell Opportunity	Yes
Active	Yes		
Created By	Vishwanath Bommalapur 5/1/2013 10:21 AM	Last Modified By	Vishwanath Bommalapur 2/26/2014 12:15 PM
Description	Genomics company engaged in mapping and sequencing of the human genome and developing gene-based drugs		
Custom Links	Billing		

DBSync

Quickbooks Id QB Error

Edit Delete Include Offline Update Account To QBOE

- 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"

The screenshot shows the dbsync Salesforce interface. At the top, there's a navigation bar with 'dbsync' logo, a search bar, and user information 'Vishwanath Bomma...'. Below this is a menu bar with options like Home, DbSync Setup, Accounts, Opportunities, Products, Invoice, Reports, Dashboards, and DBSync Batch Process. On the left, there's a sidebar with 'Create New...' and 'Recent Items' (listing Jack Rogers, GenePoint, Agents, DBSync21, DBSync1, and 0000000034). The main content area displays 'Contact Detail' for Mr. Jack Rogers. The contact information includes Name (Mr. Jack Rogers), Account Name (Burlington Textiles Corp of America), Title (VP, Facilities), Department, Birthdate, Reports To (View Org Chart), Lead Source (Web), Mailing Address (525 S. Lexington Ave, Burlington, NC 27215, USA), Languages, Created By (Vishwanath Bommalapur, 5/1/2013 10:21 AM), and Last Modified By (Vishwanath Bommalapur, 5/1/2013 10:21 AM). A 'DBSync' section at the bottom shows 'Quickbooks Id' and 'QBName' fields. Red boxes highlight the 'Update Contact to QBOE' button in the top right of the contact details and the 'Quickbooks Id' and 'QBName' fields in the DBSync section.

- 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'



New 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="{

!\$User.AVSFQuickBooks__QuickBooksOE_DBSync_Server__c)/QuickBooksoe.m?sfUrl={!

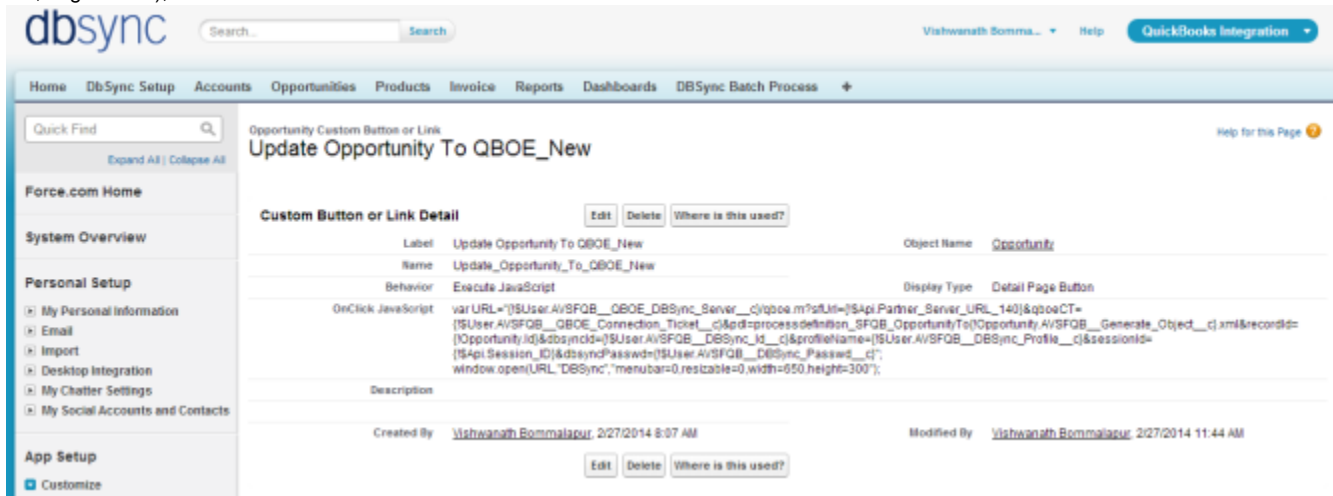
\$Api.Partner_Server_URL_140}&QuickBooksoeCT={

!\$User.AVSFQuickBooks__QuickBooksOE_Connection_Ticket__c}&pdI=processdefinition_SFQuickBooks_OpportunityTo{!Opportunity.AVSFQuickBooks__Generate_Object__c}.xml&recordId={!Opportunity.Id}&dbsyncId={!

`$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");`



Label: Update Invoice from QuickBooksOE_New

Behavior: Execute JavaScript

Display Type: Detail Page Button

OnClick JavaScript: `var URL="{`

`!$User.AVSFQuickBooks__QuickBooksOE_DBSync_Server__c)/QuickBooksoe.m?sfUrl=\{!`

`$Api.Partner_Server_URL_140}&QuickBooksoeCT={`

`!$User.AVSFQuickBooks__QuickBooksOE_Connection_Ticket__c}&pdl=processdefinition_QuickBooksSF_InvoiceToInvoice.xml&recordId=\{!Opportunity.Id}&dbsyncId=\{!`

`$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");`

The screenshot shows the dbsync web application interface. The top navigation bar includes 'Home', 'DbSync Setup', 'Accounts', 'Opportunities', 'Products', 'Invoice', 'Reports', 'Dashboards', and 'DBSync Batch Process'. A search bar is located on the left. The main content area is titled 'Update Invoice from QBOE_New' and displays the 'Custom Button or Link Detail' for the 'Opportunity' object. The details include the label, name, behavior (Execute JavaScript), and the OnClick JavaScript code. The code is a JavaScript function that opens a new window to update the invoice. The 'Created By' and 'Modified By' fields are both 'Vishwanath Bommalapur' with a timestamp of 2/27/2014 8:09 AM.

Label	Update Invoice from QBOE_New	Object Name	Opportunity
Name	Update_Invoice_from_QBOE_New		
Behavior	Execute JavaScript	Display Type	Detail Page Button
OnClick JavaScript	<pre>var URL="({User AVSFOB_QBOE_DBSync_Server__c}/qboe.m?&url={Apt Partner_Server_URL_14}&qboeCT= ({User AVSFOB_QBOE_Connection_Ticket__c}&pd=processdefinition_GBSF_InvoiceToInvoice.xml&recordid={Opportunity Id}&dbsyncdd= ({User AVSFOB_DBSync_Is__c}&profileName={User AVSFOB_DBSync_Profile__c}&sessionId={Apt Session_ID}&dbsyncPasswd= ({User AVSFOB_DBSync_Password__c}); window.open(URL,DBSync,"menubar=0,resizable=0,width=650,height=300");</pre>		
Description			
Created By	Vishwanath Bommalapur 2/27/2014 8:09 AM	Modified By	Vishwanath Bommalapur 2/27/2014 8:09 AM

- 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"

dbsync Search... Search Vishwanath Somma... Help QuickBooks Integration

Home DbSync Setup Accounts Opportunities Products Invoice Reports Dashboards DBSync Batch Process +

Create New...

Recent Items

- Opp_Vish
- Avantia2014_Vish
- Vishwanath Rommalapur
- Avantia
- DBSync21
- Jack Rogers
- GenePoint
- DBSync1
- 0000000034

Recycle Bin

Opportunity Opp_Vish

Customize Page | Edit Layout | Printable View | Help for this Page

Show Feed

Invoice (0) | Quotes (0) | Products (Standard Price Book) (1) | Open Activities (0) | Activity History (0) | Notes & Attachments (0) | Contact Sales (0) | Partners (0) | Competitors (0) | Stage History (2)

Opportunity Detail

Edit Delete Clone Update Opportunity To QBOE_New Update Invoice from QBOE_New

Opportunity Owner Vishwanath Rommalapur (Change) Amount \$50,000.00

Private Expected Revenue \$50,000.00

Opportunity Name Opp_Vish Close Date 2/27/2014

Account Name Avantia2014_Vish Next Step

Type Stage Closed Won

Lead Source Probability (%) 100%

Primary Campaign Source

Order Number Main Competitor(s)

Current Generator(s) Delivery/Installation Status

Tracking Number

Created By Vishwanath Rommalapur 2/27/2014 8:26 AM Last Modified By Vishwanath Rommalapur 2/27/2014 2:17 PM

Description

Custom Links Delivery Status

DBSync

Generate QB Error

Quickbooks ID Primary Contact

Edit Delete Clone Update Opportunity To QBOE_New Update Invoice from QBOE_New

- 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'.

dbsync Search... Search

Vishwanath Somma... Help QuickBooks Integration

Home DbSync Setup Accounts Opportunities Products Invoice Reports Dashboards DBSync Batch Process +

Create New...

Recent Items

- DBSync21
- Jack Rogers
- GenePoint
- Avantia
- DBSync1
- 0000000034

Recycle Bin

Opportunity DBSync21

Customize Page | Edit Layout | Printable View | Help for this Page

Show Feed

Invoice (1) | Quotes (0) | Products (Standard Price Book) (1) | Open Activities (0) | Activity History (0) | Notes & Attachments (0) | Contact Roles (0) | Partners (0) | Competitors (0) | Stage History (2)

Opportunity Detail

Edit Delete Clone Update Opportunity To QBOE Update Invoice from QBOE

Opportunity Owner: Vishwanath Rommalapur (Change) Amount: \$50,000.00

Private Expected Revenue: \$50,000.00

Opportunity Name: DBSync21 Close Date: 2/25/2014

Account Name: Avantia Next Step

Type Stage: Closed Won

Lead Source Probability (%): 100%

Primary Campaign Source

Order Number Main Competitor(s)

Current Generator(s) Delivery/Installation Status

Tracking Number

Created By: Vishwanath Rommalapur 2/25/2014 7:45 AM Last Modified By: Vishwanath Rommalapur 2/25/2014 8:42 AM

Description

Custom Links: Delivery Status

DBSync

Generate QB Error Chat

Quickbooks Id Primary Contact

Edit Delete Clone Update Opportunity To QBOE Update Invoice from QBOE

Invoice New Invoice Invoice Help

Action	Invoices	Invoice Number	Total Invoice Amount	Payments	Balance	Days Outstanding	Sync Date
Edit Del	0000000037	5	\$50,000.00	\$0.00	\$50,000.00	1	2/25/2014 8:01 AM

- Go to Setup
- Customize
- Opportunity
- Opportunity Products
- Edit Page Layout to move 'QuickBooksID' field to the page layout.

The screenshot shows the DBSync Salesforce interface. The top navigation bar includes tabs for Home, DbSync Setup, Accounts, Opportunities, Products, Invoice, Reports, Dashboards, and DBSync Batch Process. The 'Opportunities' tab is active. On the left, there's a sidebar with 'Recent Items' and a 'Recycle Bin'. The main content area displays 'Opportunity Product Detail' for 'GenWatt Diesel 200kW for DBSync21'. The details include Opportunity (DBSync21), Product (GenWatt Diesel 200kW), Product Code (GC1040), List Price (\$25,000.00), Sales Price (\$25,000.00), and Quantity (2.00). Below this, a 'QB Sync' section shows a 'Quickbooks Id' field highlighted with a red box, and other details like 'Created By' and 'Last Modified By'.

- 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'



New 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 = "{

!\$User.AVSFQuickBooks__QuickBooksOE_DBSync_Server__c)/QuickBooksoe.m?sessionId={!

\$Api.Session_ID}&sfUrl={

!\$Api.Partner_Server_URL_140\}&QuickBooksoeCT={!

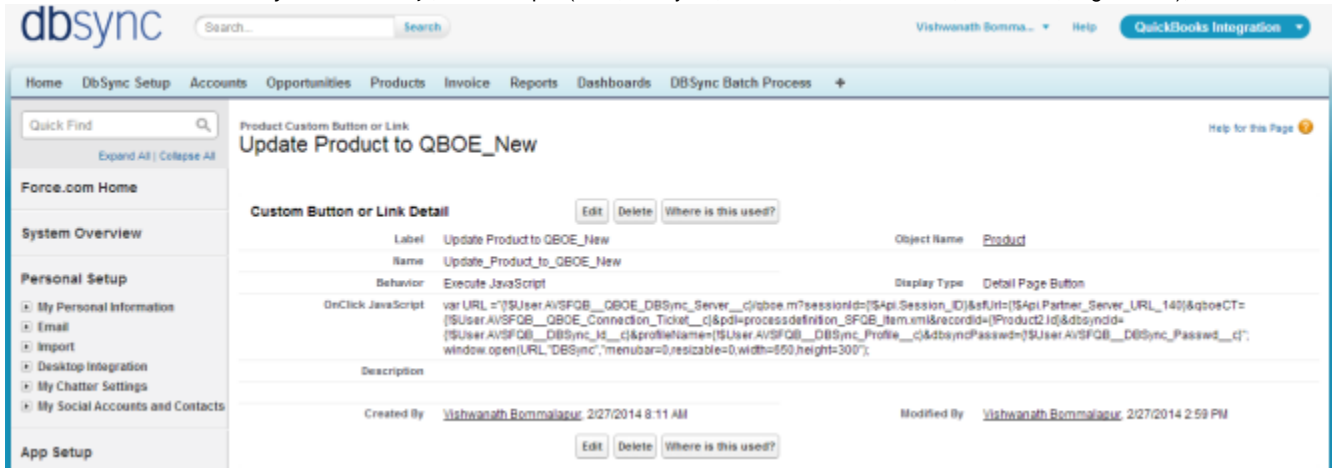
\$User.AVSFQuickBooks__QuickBooksOE_Connection_Ticketc}&pdl=processdefinition_SFQuickBooks_Item.xml&recordId={

!Product2.Id\}&dbsyncId=\{!

\$User.AVSFQuickBooksDBSync_Idc\}&profileName={

!\$User.AVSFQuickBooks__DBSync_Profile__c\}&dbsyncPasswd=\{!

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



- Go to Setup



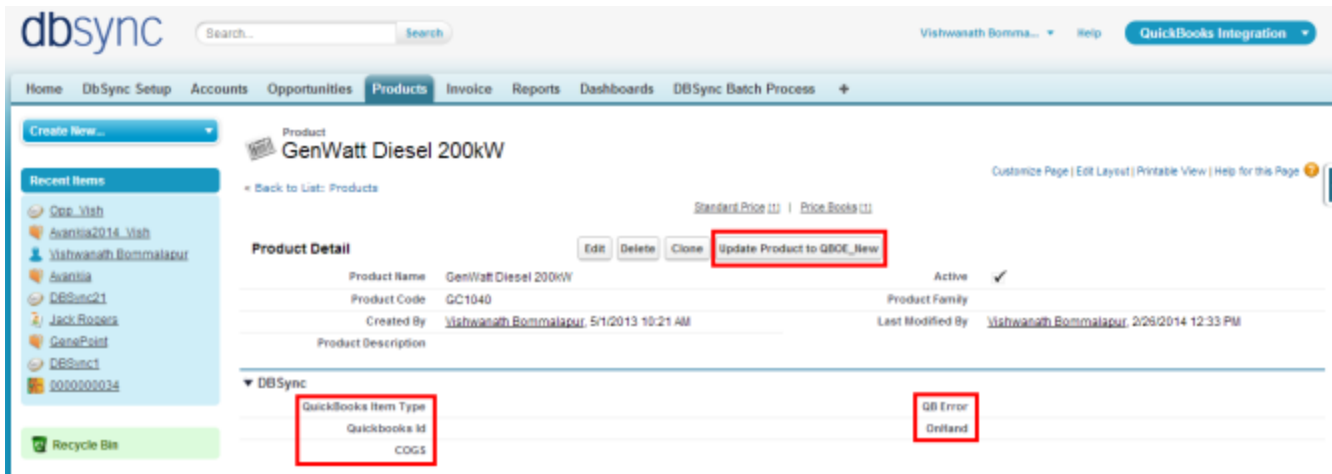
Customize



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.



- Go to setup



Customize



Users



'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.

- Field "DBSync Id"
- Field "DBSync Passwd"
- Field "DBSync Server URL"
- Field "DBSync Profile"