Salesforce & QuickBooks Online: Bidirectional Integration

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Overview

DBSync for Salesforce & QuickBooks Online Integration is an easy to use application. It integrates Salesforce Accounts, Contacts, Products, Opportunity with QuickBooks Online Customers, Items, Invoice, Sales Receipt & Credit Memo. DBSync is also useful in migrating historical QuickBooks Online data into Salesforce or vice versa.
DBSync provides Bi-directional sync with pre-built field-to-field mapping along with flexibility for more complex and dynamic mapping capability. DBSync's automatic online update enables its customers to enjoy all the product updates and features that come with every new release.

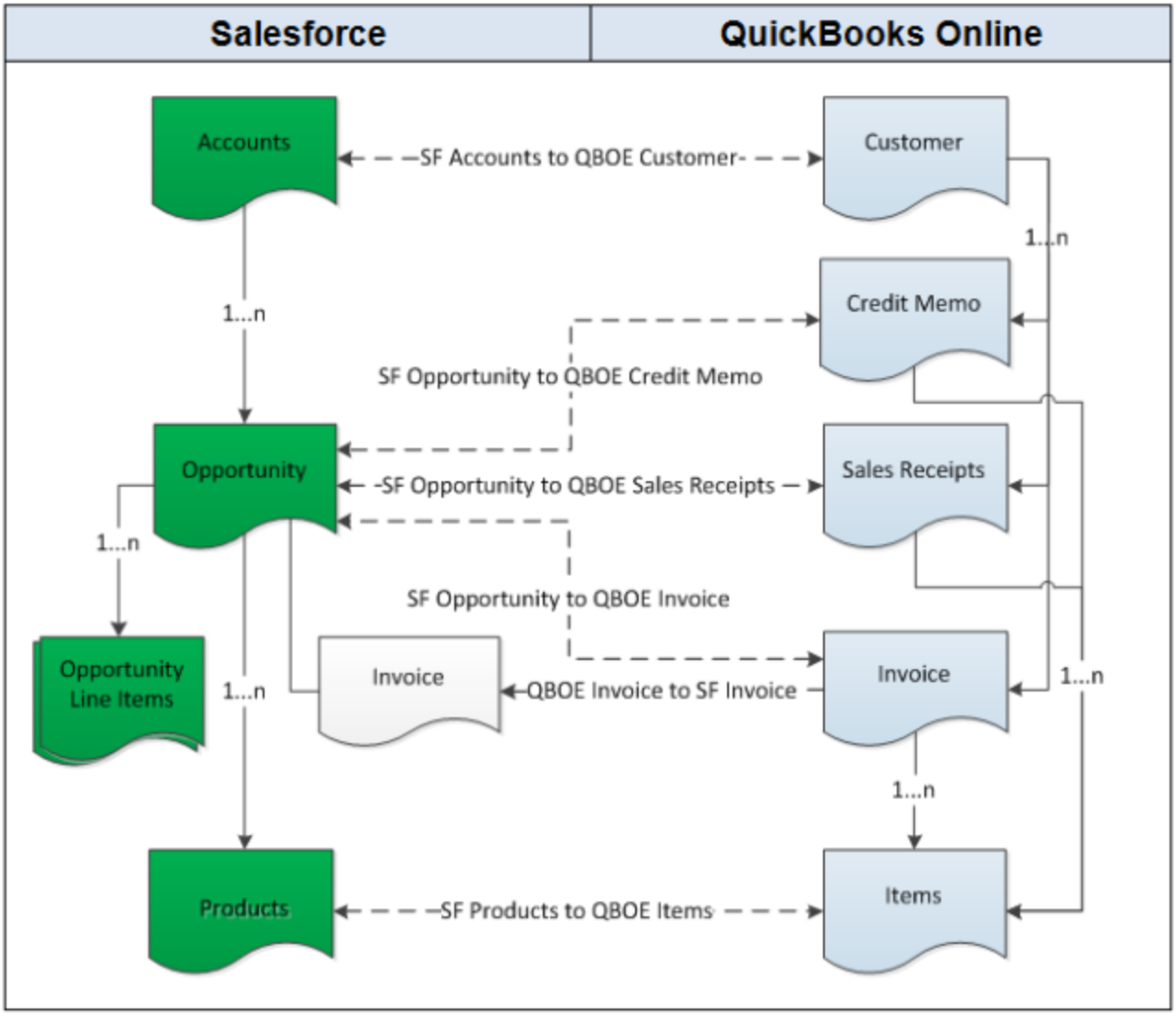
Data Flow

Data flow of Bi-directional integration between Salesforce & QuickBooks Online is shown in the table below.

Process Map

Process Map of Bi-directional integration between Salesforce & QuickBooks Online is shown in the image below.

Data Flow between Salesforce & QuickBooks Online



Pre-requisites for Integration

- Integration of Salesforce to QBOE transaction is invoked if the Generate field in Salesforce Opportunity is selected with the required transaction.
- It is mandatory that Salesforce Opportunity (to be integrated with QBOE Invoice) is associated with respective Salesforce Account. And, it also should have Products with Standard Price Book attached to it for DBSync to invoke integration.

DBSync package (QuickBooks Integration) Installation in Salesforce

1. Get the following App from AppExchange for your Salesforce instance - https://login.salesforce.com/packaging/installPackage.apexp?p0=04t600000001jlq
2. ***Note:*** *If you are installing into a Sandbox, you must replace the initial portion of the URL with* http://test.salesforce.com.
3. Input **Username** and **Password** of the Salesforce instance where you would like to install DBSync. The **Username** and **Password** must belong to a user with **administrative privileges** to install.
4. You can see details like App Name, Publisher, Version Name, Version Number along with Components & API Access.
5. Select a profile - Admin, All Users or a specific profile. The selected profile will have access to the installed package. Then, click install or upgrade.
6. Once the process is complete, you will see a message - Installation or Upgrade complete.
7. Assign **DBSync Page Layouts** to **Accounts, Contacts, Opportunity, Opportunity Products and Products** objects. Refer to the following steps to assign DBSync Page layout to Accounts Object. Existing Page Layout will be replaced by DBSync Page Layout. Any custom fields available in the existing page layout should be moved to DBSync Page Layout if required.
8. Go to **Salesforce Setup > Customize > Accounts > Page Layouts**. This will show the list of available Page Layouts for Accounts

Object. Click on **Page Layout Assignment**.
9. You will find the list of default Page Layouts assigned for every Salesforce Profile. Click on **Edit Assignment** to proceed.
10. Click on the **Page Layout next to the required profile**. Account Layout is the existing Page Layout for System Administrator Profile. The profile should be assigned to DBSync's Page Layout. In this case Account Layout should be selected next to System Administrator's profile.
11. Select DBSync Account Layout from **Page Layout To Use** picklist. Page Layout will be changed from Account Layout to DBSync Account Layout. Click on **Save** to save the new Page Layout assignment.
12. Similarly, assign DBSync Page Layout for Salesforce Objects - Contacts, Opportunity, Opportunity Products and Products.

DBSync Profile Setup

1. Go to www.mydbsync.com & register for Free Trial. Ensure that Source and Target Adapters are Salesforce and QuickBooks Online respectively.
2. Login using to DBSync account. Go to *Company* tab. Click on *edit* to view DBSync's Org Properties. Click on *edit* and replace the existing URL with https://dbsync01.appmashups.com/qboev3/login.m
3. Go to *Process Template* tab on DBSync's home page and click on *SalesforceQuickBooksOnline:BiDirectional* to include process template for Bi-directional Integration of Salesforce & QuickBooks Online.
4. Click on *Launch* on My Home tab. You will see Project page on the next tab of your browser.
5. Click on Projects on the left panel. Then, click on the project *SalesforceQuickBooksOnline:BiDirectional.*
6. Click on Connectors. You will see Salesforce & QuickBooks Online connectors. These connectors need to be configured as follows:
7. Click on Salesforce Connector. Select appropriate **End Point** under **Quick Setup** tab. Click on **Connect to Salesforce**. This will take you to Salesforce login page. Enter your Username & Password to login into Salesforce. Once you login, your Salesforce connector will be connected to your Salesforce instance. If you want to connect using different Salesforce instance, click on **Disconnect** in **Quick Setup** ta b. Then, connect using the required Salesforce credentials.
8. You can also use **Advanced Properties** tab to connect to your Salesforce instance. Go to **Advanced Properties.** Fill in the Salesforce Username, Password and, Security Token for your Salesforce Instance. Select the appropriate End Point. Once you enter all the required details, click on **Validate Connection**. If the validation is successful, click on **Save** to Save the Salesforce details. If the validation fails, you will see **Validation Errors** on the top right corner. Review details in **Validation Errors** section and make the necessary changes in Advanced Properties. Then, click on Validate Connection again.
9. Click on QuickBooks Online Connector. Then, click on the link **Connect to QuickBooks.** Sign into QuickBooks online to authorize DBSync Salesforce Integration for QuickBooks to connect to Intuit.
10. You can also connect to QuickBooks Online using Advanced Properties tab in QuickBooks Online Connector Settings.
11. Go to Advanced Properties. Enter following details - Application OAuth Key, Application OAuth Secret, User OAuth Key, User OAuth Secret, Realm Id, Datasource, OAuth Last Updated, OAuth URL.
12. Click on *Save* to save the settings. Click on *Validate Connection* to confirm that the QuickBooks Online connections settings are valid.

Running the Integration

DBSync Integration of Salesforce & QuickBooks Online can be initiated by:

- **Clicking on Salesforce custom buttons.**
- **Using DBSync Scheduler.**

Click on Salesforce custom buttons:

1. Click the custom button on Salesforce Accounts, Contacts and Opportunity to update specific records into QuickBooks as and when required. To set Auto run integration, use one of the following methods.
2. Click **Update Account to QBOE** button on the Accounts Object.
3. Click **Update Contact to QBOE** on the Contacts Object.
4. Click **Update Opportunity to QBOE** and **Update Invoice from QBOE** button on the Opportunities Object.

Using DBSync Scheduler

- Scheduler available in DBSync Account. It can be used to schedule the integration. For details of the scheduler click on the http://help2.mydbsync.com/docs1/display/dbsync/Scheduler link.