

Install DBSync Package into ServiceMax Salesforce instance__

DBSync Package ServiceMax Accounting Integration is installed in ServiceMax Salesforce Instance. Pre-requisites and the steps involved in installation are explained in this section.

Pre-requisites:

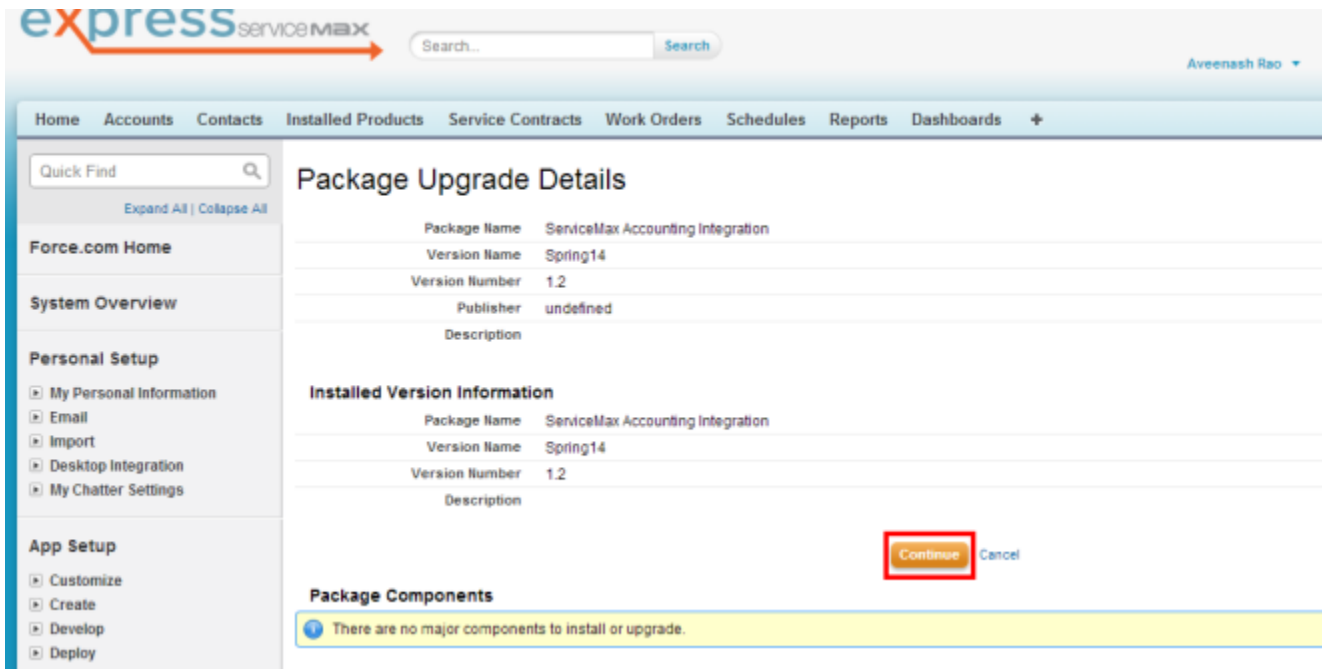
Package "ServiceMax", Version 14.10000 or later must be installed in Salesforce Instance to install DBSync Package "Service Max Accounting Integration".

Installation Steps:

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

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04ti0000000TUR5>

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



The screenshot displays the ServiceMax Salesforce interface. At the top, there is a navigation bar with the 'express service max' logo and a search bar. Below this is a menu bar with options: Home, Accounts, Contacts, Installed Products, Service Contracts, Work Orders, Schedules, Reports, and Dashboards. A sidebar on the left contains sections for 'Force.com Home', 'System Overview', 'Personal Setup' (with links to My Personal Information, Email, Import, Desktop Integration, and My Chatter Settings), and 'App Setup' (with links to Customize, Create, Develop, and Deploy). The main content area is titled 'Package Upgrade Details' and shows information for the 'ServiceMax Accounting Integration' package, including its version (Spring14), version number (1.2), and publisher (undefined). Below this, there is a section for 'Installed Version Information' with the same details. At the bottom of the main content area, there is a 'Continue' button highlighted with a red box, and a 'Cancel' button. A message at the bottom states: 'There are no major components to install or upgrade.'

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

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Home Accounts Contacts Installed Products Service Contracts Work Orders Schedules Reports Dashboards +

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Force.com Home

System Overview

Personal Setup

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

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

ServiceMax Accounting Integration

Help for this Page

Step 1. Approve Package API Access

Step 1 of 2

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	✓	✓	✓	✓	Ideas	✓	✓	✓	✓
Assets	✓	✓	✓	✓	Leads	✓	✓	✓	✓
Campaigns	✓	✓	✓	✓	Opportunities	✓	✓	✓	✓
Cases	✓	✓	✓	✓	Price Books	✓	✓	✓	✓
Contacts	✓	✓	✓	✓	Products	✓	✓	✓	✓
Contracts	✓	✓	✓	✓	Push Topics	✓	✓	✓	✓
Documents	✓	✓	✓	✓	Solutions	✓	✓	✓	✓

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](#)

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

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System Overview

Personal Setup

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Package Installer

ServiceMax Accounting Integration

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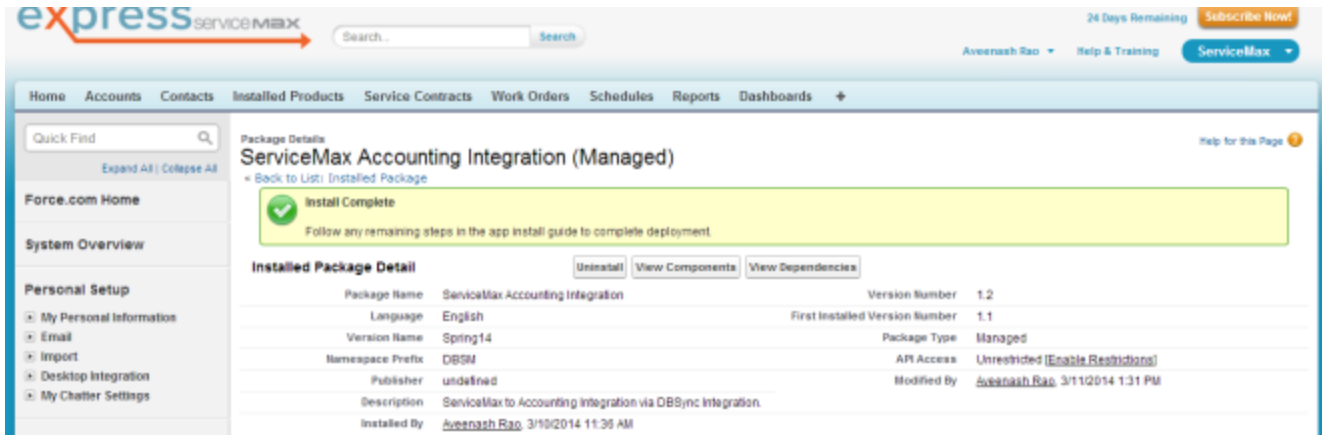
Step 2. Install Package

Step 2 of 2

The package is ready to be installed. Click Install to continue.

[Previous](#) [Install](#) [Cancel](#)

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



- Once the DBSync Package ServiceMax Accounting Integration is installed the below fields should be included in Page Layout as explained below.

Accounting Id:

Accounting Id is the unique Id for a record in QuickBooks. After successful integration, Accounting Id is updated in Salesforce for every record that has been synced.

Generate:

Generate field is a picklist field to flag Work Order either Invoice or None. By default the value of Generate field will be blank. It is necessary that Generate field is selected Invoice for successful generation of Invoice in QuickBooks during DBSync Integration.

Invoice Date:

Invoice Date is a formula field to display the date on which the Work Order is flagged as Invoice to Sync as QuickBooks Invoice.

Sync Error:

Sync Error is an error from QuickBooks which gets updated in Salesforce for every record that has failed to sync. Sync Error briefly describes the reason for failure of sync.

- Go to setup
 - Customize
 - Account
 - 'Page Layout'

Edit the Page Layout. Under the Page Layout drag the fields specified below to add it under the section "System Information" in Page Layout and save.

- Fields: "Accounting Id", "Sync Error"

The screenshot shows the ServiceMax web application interface. The top navigation bar includes the ServiceMax logo, a search bar, and user information (Avenash Rao, 23 Days Remaining, Subscribe Now). The main navigation menu includes Home, Accounts, Contacts, Installed Products, Service Contracts, Work Orders, Schedules, Reports, and Dashboards. The 'Accounts' tab is selected, showing the 'Account Detail' page for 'Burlington Textiles Corp of America'. The page includes a 'Recent Items' sidebar with a list of work orders and a main content area with sections for 'Account Management', 'Account Information', and 'Service Information'. The 'Service Information' section contains fields for 'Accounting Id' and 'Sync Error', both of which are highlighted with red boxes. The 'Accounting Id' field is also labeled 'Access Hours'.

- Go to setup
- Create
- Objects
- Work Order
- Page Layout
- Edit the required Page Layout.

Under the Page Layout create a new section "DBSync Information" & drag the fields specified below to add it in Page Layout under "DBSync Information".

- Fields: "Accounting Id", "Invoice Date", "Generate", "Sync Error"

The screenshot shows the ServiceMax web application interface. The top navigation bar includes the ServiceMax logo, a search bar, and user information (Avenash Rao, 23 Days Remaining, Subscribe Now). The main navigation menu includes Home, Accounts, Contacts, Installed Products, Service Contracts, Work Orders, Schedules, Reports, and Dashboards. The 'Work Orders' tab is selected, showing the 'Work Order Detail' page for 'WO-00000542'. The page includes a 'Recent Items' sidebar with a list of work orders and a main content area with sections for 'Work Order Actions', 'Information', 'Problem Description', 'Address', and 'DBSync Information'. The 'DBSync Information' section contains fields for 'Generate', 'Accounting Id', and 'Sync Error', all of which are highlighted with red boxes.

- Go to setup
- Create

Objects



Work Detail



Page Layout



Edit the required Page Layout.

Under the Page Layout drag the field specified below to add it in Page Layout under "Usage/Consumption Details".

- Fields: "LineItem Type"

The screenshot shows the ServiceMax interface for a Work Order Detail. The top navigation bar includes links for Home, Accounts, Contacts, Installed Products, Service Contracts, Work Orders, Schedules, Reports, and Dashboards. The main content area displays the Work Order ID WL-00000185. Below this, the 'Work Detail Detail' section shows fields for Work Order (WL-00000185), Record Type (Usage/Consumption), Line Type (Parts), and Activity Type. The 'Usage/Consumption Details' section is expanded, showing fields for Part (Ultrasound Logic 200), Line Qty (1.0000), Is Billable (checked), Billable Line Price, Billable Qty, Use Price From (Pricebook/Contract), Line Price Per Unit (USD 2,500.00), Total Line Price (USD 2,500.00), Consumed From Location (FS_Scott Techmann), Reference Information, Work Description, and Hours Worked. The 'LineItem Type' field is highlighted with a red box.

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