

# Workflows and Functionality

DBSync's mapping, for Salesforce and QuickBooks integration, consists of multiple workflows with specific function. This section explains the functions of each workflow and its pre-requisites for the process template **SalesforceQuickBooks:BiDirectional\_v2**. For details on DBSync platform's mapping terminology, refer to [iPaaS](#) section.

- [Initial State](#)
- [Account To Customer](#)
- [Product To Item Service](#)
- [Product To Item Inventory](#)
- [Product To Item Non- Inventory](#)
- [Product To Item Other Charge](#)
- [Product To Item Discount](#)
- [Opportunity To Invoice](#)
- [Invoice Line Update](#)
- [Opportunity To Estimate](#)
- [Estimate Line Update](#)
- [Opportunity To Sales Order](#)
- [Sales Order Line Update](#)
- [Opportunity To Sales Receipt](#)
- [Customer To Account](#)
- [Item Service To Product](#)
- [Item Inventory To Product](#)
- [Item Non-Inventory To Product](#)
- [Item Other Charge To Product](#)
- [Item Discount To Product](#)
- [Invoice To Opportunity](#)
- [Invoice To Receivables](#)
- [Estimate To Opportunity](#)
- [Estimate To Receivables](#)
- [Sales Order To Opportunity](#)
- [Sales Order To Receivables](#)
- [Sales Receipt To Opportunity](#)

## Initial State

### Functionality:

It creates custom fields "OpportunityId" , "SFLINEID" in QuickBooks Customer and Items respectively. It also creates Chart of Account "Other Income" in QuickBooks.

### Pre-requisites:

At least one record should be present in Salesforce Accounts object.

## Account To Customer

### Functionality:

It creates Customers in QuickBooks from Salesforce Accounts.

### Pre-requisites:

QuickBooks Id="Null".

## Product To Item Service

### Functionality:

It creates Items in QuickBooks from Salesforce Products.

### Pre-requisites:

QuickBooks Item Type = "Item Service".

## Product To Item Inventory

### Functionality:

It creates Items in QuickBooks from Salesforce Products.

**Pre-requisites:**

QuickBooks Item Type = "Item Inventory".

**Product To Item Non- Inventory****Functionality:**

It creates Items in QuickBooks from Salesforce Products.

**Pre-requisites:**

QuickBooks Item Type = "Item Non Inventory".

**Product To Item Other Charge****Functionality:**

It creates Items in QuickBooks from Salesforce Products.

**Pre-requisites:**

QuickBooks Item Type = "Item Other Charge".

**Product To Item Discount****Functionality:**

It creates Items in QuickBooks from Salesforce Products.

**Pre-requisites:**

QuickBooks Item Type = "Item Discount".

**Opportunity To Invoice****Functionality:**

It creates Customer, Items, Invoice & Invoice Line Items in QuickBooks from Salesforce Opportunity.

**Pre-requisites:**

- Account Name in Salesforce Opportunity should be included.
- Product should be attached to Salesforce Opportunity.
- Generate = "Invoice"

**Invoice Line Update****Functionality:**

It updates the QuickBooks Line Id of QuickBooks Invoice Line Items in QuickBooks Id field of Salesforce Opportunity Product.

**Pre-requisites:**

End of Opportunity To Invoice State initiates Invoice Line Update State.

**Opportunity To Estimate****Functionality:**

It creates Customer, Items, Estimate & Estimate Line Items in QuickBooks from Salesforce Opportunity.

**Pre-requisites:**

- Account Name in Salesforce Opportunity should be included.
- Product should be attached to Salesforce Opportunity.
- Generate = "Estimate".

**Estimate Line Update**

**Functionality:**

It updates the QuickBooks Line Id of QuickBooks Estimate Line Items in QuickBooks Id field of Salesforce Opportunity Product.

**Pre-requisites:**

End of Opportunity To Estimate State initiates Estimate Line Update State.

**Opportunity To Sales Order****Functionality:**

It creates Customer, Items, Sales Order & Sales Order Line Items in QuickBooks.

**Pre-requisites:**

- Account Name in Salesforce Opportunity should be included.
- Product should be attached to Salesforce Opportunity.
- Generate = "Sales Order".

**Sales Order Line Update****Functionality:**

It updates the QuickBooks Line Id of QuickBooks Sales Order Line Items in QuickBooks Id field of Salesforce Opportunity Product.

**Pre-requisites:**

End of Opportunity To Sales Order State initiates Sales Order Line Update State.

**Opportunity To Sales Receipt****Functionality:**

It creates Customer, Items, Sales Receipt & Sales Receipt Line Items in QuickBooks.

**Pre-requisites:**

- Account Name in Salesforce Opportunity should be included.
- Product should be attached to Salesforce Opportunity.
- Generate = "Sales Receipt".

**Customer To Account****Functionality:**

It creates Account in Salesforce from QuickBooks Customer.

**Pre-requisites:**

Last modified date or created date of QuickBooks record should be greater than last success run of DBSync.

**Item Service To Product****Functionality:**

It creates Product in Salesforce from QuickBooks Items of type Service.

**Pre-requisites:**

Last modified date or created date of QuickBooks record should be greater than last success run of DBSync.

**Item Inventory To Product****Functionality:**

It creates Product in Salesforce from QuickBooks Items of type Inventory.

**Pre-requisites:**

Last modified date or created date of QuickBooks record should be greater than last success run of DBSync.

### Item Non-Inventory To Product

**Functionality:**

It creates Product in Salesforce from QuickBooks Items of type Non-Inventory.

**Pre-requisites:**

Last modified date or created date of QuickBooks record should be greater than last success run of DBSync.

### Item Other Charge To Product

**Functionality:**

It creates Product in Salesforce from QuickBooks Items of type Other Charge.

**Pre-requisites:**

Last modified date or created date of QuickBooks record should be greater than last success run of DBSync.

### Item Discount To Product

**Functionality:**

It creates Product in Salesforce from QuickBooks Items of type Discount.

**Pre-requisites:**

Last modified date or created date of QuickBooks record should be greater than last success run of DBSync.

### Invoice To Opportunity

**Functionality:**

It updates/creates Account, Opportunity and Opportunity Product in Salesforce from QuickBooks Customer, Invoice and Invoice Line Item respectively.

**Pre-requisites:**

Last modified date or created date of QuickBooks record should be greater than last success run of DBSync.

### Invoice To Receivables

**Functionality:**

It updates/creates Invoice Information and Invoice Details in Salesforce custom object Receivables.

**Pre-requisites:**

Sync to Opp = "true".

### Estimate To Opportunity

**Functionality:**

It updates/creates Account, Opportunity and Opportunity Product in Salesforce from QuickBooks Customer, Estimate & Estimate Line Item respectively.

**Pre-requisites:**

Last modified date or created date of QuickBooks record should be greater than last success run of DBSync.

### Estimate To Receivables

**Functionality:**

It updates/creates Estimate Information and Estimate Details in Salesforce custom object Receivables.

**Pre-requisites:**

Sync to Opp = "true".

## Sales Order To Opportunity

**Functionality:**

It updates/creates Account, Opportunity & Opportunity Product in Salesforce from QuickBooks Customer, Sales Order & Sales Order Line Item respectively.

**Pre-requisites:**

Last modified date or created date of QuickBooks record should be greater than last success run of DBSync.

## Sales Order To Receivables

**Functionality:**

It updates/creates Sales Order Information and Sales Order Details in Salesforce custom object Receivables.

**Pre-requisites:**

Sync to Opp = "true".

## Sales Receipt To Opportunity

**Functionality:**

It creates Account, Opportunity & Opportunity Product in Salesforce from QuickBooks Customer, Sales Order & Sales Order Line Item respectively.

It updates Account, Opportunity & Opportunity Product in Salesforce from QuickBooks Customer, Sales Order & Sales Order Line Item respectively.

**Pre-requisites:**

The last modified date or created date of QuickBooks record should be greater than the last successful run of DBSync.