

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.

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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.