

**DBSync Integration**  
**Salesforce and QuickBooks Online (Bi-directional)**

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## Overview:

DBSync for Salesforce & QuickBooks Online Integration is an easy to use application to integrate Salesforce Accounts / Contacts, Products, Opportunity with QuickBooks Online Customers, Items, Invoice, Sales Receipt & Credit Memo. This is also useful to migrate historical QuickBooks Online data into Salesforce or vice versa.

DBSync provides Bi-directional sync with pre-built field to field map along with flexibility for more complex and dynamic mapping capability. DBSync also has an automatic online update, enabling DBSync customers to enjoy all the product updates and features with every new release.

## Data Flow:

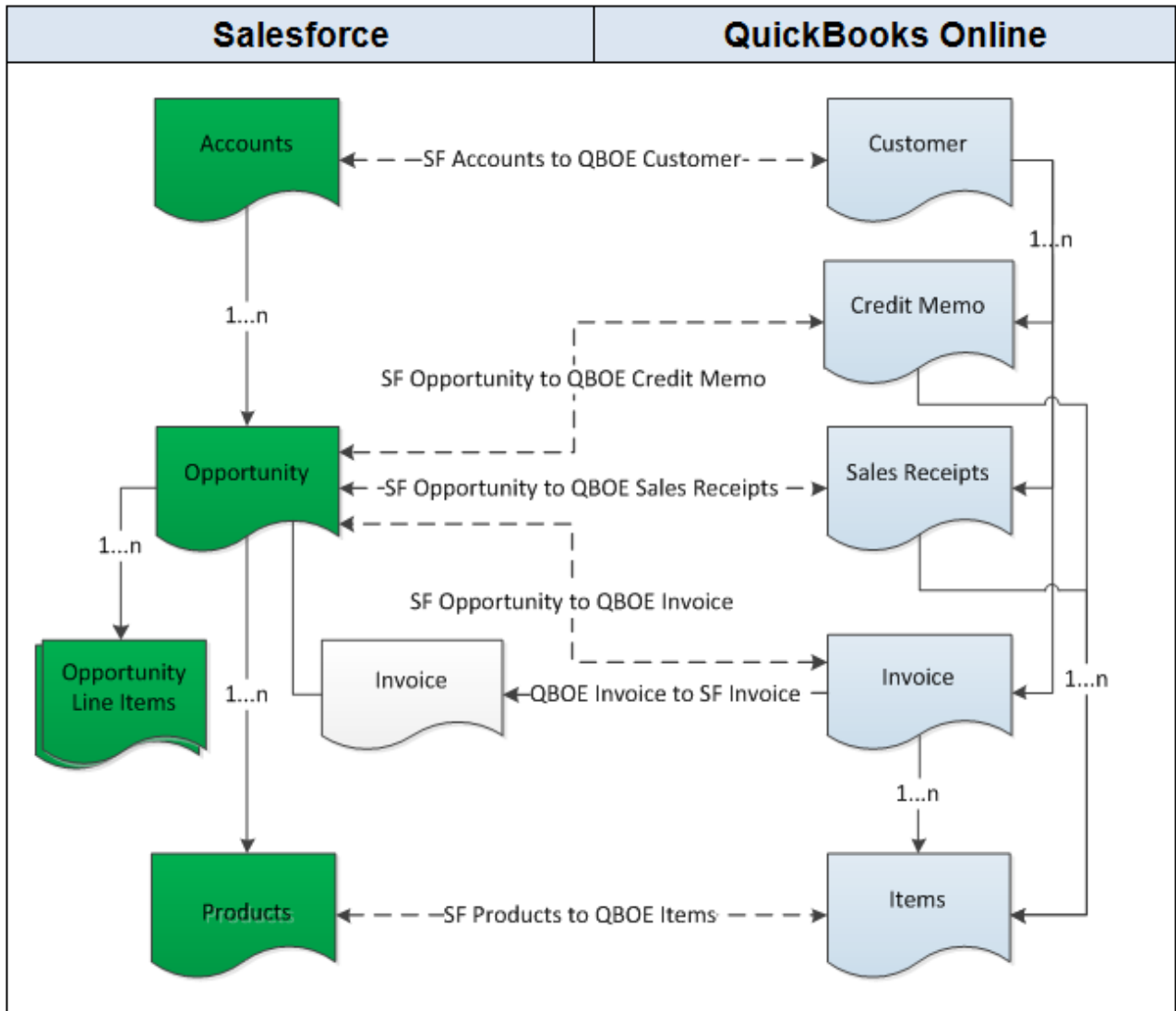
Data flow of Bi-directional integration between Salesforce & QuickBooks Online is shown in the below table.

Salesforce	↔	QuickBooks Online
Accounts / Contacts	↔	Customer
Opportunity & Line Items	↔	Invoice & Line Items
Opportunity & Line Items	↔	Sales Receipt & Line Items
Opportunity & Line Items	↔	Credit Memo & Line Items
Products	↔	Items

## Process Map:

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

### Data Flow between Salesforce & QuickBooks Online



## Pre-requisites for Integration:

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

## 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&crc=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'.

The screenshot shows the DBSync application interface within a Salesforce environment. The top navigation bar includes 'Home', 'DbSync Setup', 'Accounts', 'Opportunities', 'Products', 'Invoice', 'Reports', 'Dashboards', and 'DBSync Batch Process'. The main content area is titled 'Package Upgrade Details' and displays the following information:

- Package Name:** QuickBooks Integration
- Version Name:** 1.19
- Version Number:** 1.19
- Publisher:** Avankia

Below this, there is a section for 'Installed Version Information' with the same details. A 'Continue' button is highlighted with a red box, and a 'Cancel' button is also visible.

The 'Package Components' section shows a table with the following data:

Action	Component Name	Parent Object	Component Type	Installation Notes
Update	Invoice		Tab	This is an upgraded component. It will be updated to the new version.

## DBSYNC DATASHEET

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

The screenshot shows the dbsync Package Installer interface for QuickBooks Integration. The page is titled "Step 1. Approve Package API Access" and is labeled as "Step 1 of 3". The main content area contains the following sections:

- Package Custom Objects:** This Package will have the user's access (via the API) to all Custom Objects in your Organization.
- Extended Object Permissions:** A table showing permissions for various objects. The table is divided into two columns, each with headers "Read", "Create", "Edit", and "Delete".
- 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.

At the bottom right of the page, there are "Previous", "Next", and "Cancel" buttons. The "Next" button is highlighted with a red box.

	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	✓	✓	✓	✓					

- Choose Security Level to Grant Access and then click on 'Next'.

The screenshot shows the dbsync Package Installer interface for QuickBooks Integration, Step 2: Choose security level. The page is titled "Step 2. Choose security level" and is labeled as "Step 2 of 3". The main content area contains the following sections:

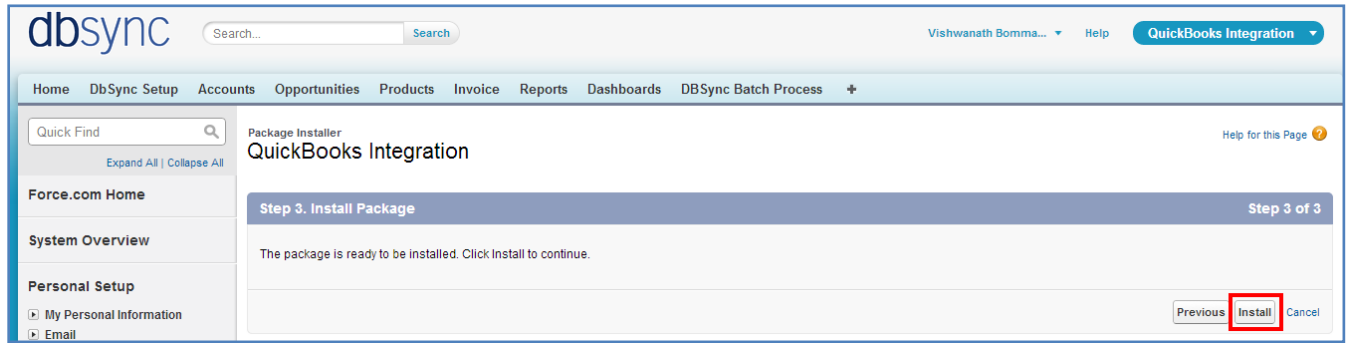
- Select security settings:** Three radio button options are presented:

- 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)

At the bottom right of the page, there are "Previous", "Next", and "Cancel" buttons. The "Next" button is highlighted with a red box.

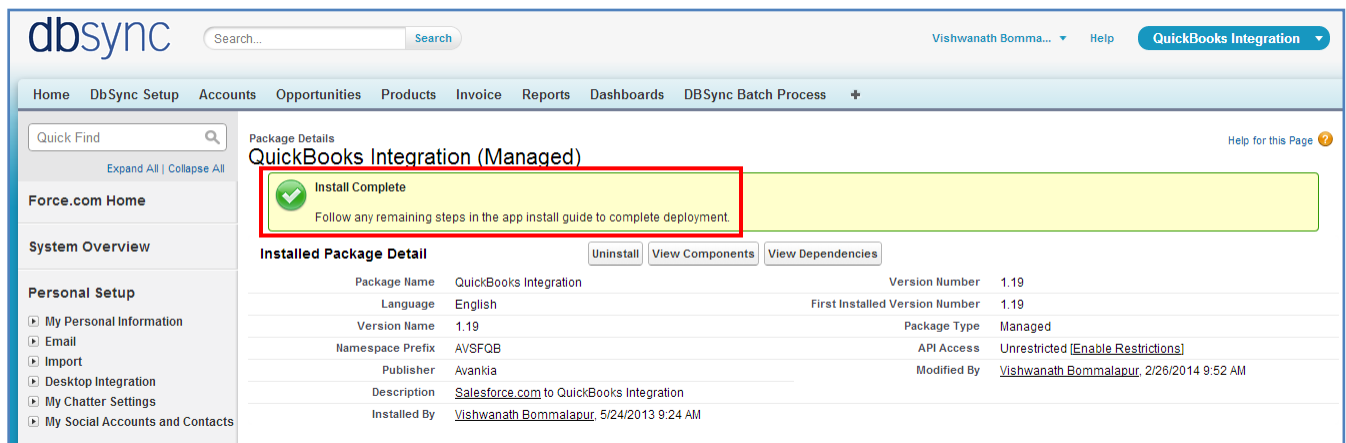
## DBSYNC DATASHEET

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



The screenshot shows the 'QuickBooks Integration' package installer in the DBSync application. The interface includes a search bar, navigation tabs, and a sidebar. The main content area displays 'Step 3. Install Package' with the message 'The package is ready to be installed. Click Install to continue.' At the bottom right, there are three buttons: 'Previous', 'Install' (highlighted with a red box), and 'Cancel'.

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



The screenshot shows the 'QuickBooks Integration (Managed)' package details in the DBSync application. A green checkmark and the text 'Install Complete' are highlighted with a red box. Below this, there is a table of package details.

Installed Package Detail		Uninstall	View Components	View Dependencies
Package Name	QuickBooks Integration			
Language	English			
Version Name	1.19			
Namespace Prefix	AVSFOB			
Publisher	Avankia			
Description	Salesforce.com to QuickBooks Integration			
Installed By	Vishwanath Bommalapur, 5/24/2013 9:24 AM			
Version Number	1.19			
First Installed Version Number	1.19			
Package Type	Managed			
API Access	Unrestricted [Enable Restrictions]			
Modified By	Vishwanath Bommalapur, 2/26/2014 9:52 AM			

## DBSYNC DATASHEET

- 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", "QB Error"
  - Button: " Update Account To QBOE"

The screenshot displays the dbsync web interface for the 'GenePoint' account. The 'Accounts' menu is active, and the 'Account Detail' section is visible. The 'Update Account To QBOE' button is highlighted in red. At the bottom of the page, the 'Quickbooks Id' and 'QB Error' fields are also highlighted in red.

Account Detail	
Account Owner	Vishwanath Bommalapur [Change]
Account Name	GenePoint [View Hierarchy]
Parent Account	
Account Number	CC978213
Account Site	
Type	Customer - Channel
Industry	Biotechnology
Annual Revenue	\$30,000,000
Billing Address	345 Shoreline Park Mountain View, CA 94043 USA
Customer Priority	Low
SLA Expiration Date	11/27/2012
Number of Locations	1
Active	Yes
Created By	Vishwanath Bommalapur, 5/1/2013 10:21 AM
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
---------------	----------



## DBSYNC DATASHEET

- 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", "QBName"
  - Button: " Update Contact To QBOE"

The screenshot displays the DBSync CRM interface for a contact named Mr. Jack Rogers. The contact details are as follows:

Contact Owner	Vishwanath Bommalapur [Change]	Phone	(336) 222-7000
Name	Mr. Jack Rogers	Home Phone	
Account Name	Burlington Textiles Corp of America	Mobile	
Title	VP, Facilities	Other Phone	
Department		Fax	(336) 222-8000
Birthdate		Email	irogers@burlington.com
Reports To	[View Org Chart]	Assistant	
Lead Source	Web	Asst. Phone	
Mailing Address	525 S. Lexington Ave Burlington, NC 27215 USA	Other Address	
Languages		Level	
Created By	Vishwanath Bommalapur, 5/1/2013 10:21 AM	Last Modified By	Vishwanath Bommalapur, 5/1/2013 10:21 AM
Description			

Below the contact details, a table shows the 'Quickbooks Id' and 'QBName' fields:

Quickbooks Id	QBName	Jack Rogers-Burlington Textiles Corp of America
	QB Error	

## DBSYNC DATASHEET

- New Buttons "Update Opportunity To QBOE\_New" and "Update Invoice from QBOE\_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 QBOE\_New

**Behavior:** Execute JavaScript

**Display Type:** Detail Page Button

**OnClick JavaScript:** var

```
URL="{!$User.AVSFQB__QBOE_DBSync_Server__c}/qboe.m?sfUrl={!$Api.Partner_Server_URL_140}&qboeCT={!$User.AVSFQB__QBOE_Connection_Ticket__c}&pd=processdefinition_SFQB__OpportunityTo{!Opportunity.AVSFQB__Generate_Object__c}.xml&recordId={!Opportunity.Id}&dbsyncId={!$User.AVSFQB__DBSync_Id__c}&profileName={!$User.AVSFQB__DBSync_Profile__c}&sessionId={!$Api.Session_ID}&dbsyncPasswd={!$User.AVSFQB__DBSync_Passwd__c}";  
window.open(URL,"DBSync","menubar=0,resizable=0,width=650,height=300");
```

The screenshot displays the dbsync application interface within a Salesforce environment. The top navigation bar includes the dbsync logo, a search bar, and user information for Vishwanath Bomma... with a Help button and a QuickBooks Integration dropdown. The main navigation menu contains links for Home, DbSync Setup, Accounts, Opportunities, Products, Invoice, Reports, Dashboards, and DBSync Batch Process. The left sidebar provides navigation options for Force.com Home, System Overview, Personal Setup (including My Personal Information, Email, Import, Desktop Integration, My Chatter Settings, and My Social Accounts and Contacts), and App Setup (with Customize checked). The main content area is titled 'Opportunity Custom Button or Link' and 'Update Opportunity To QBOE\_New'. It features a 'Custom Button or Link Detail' section with fields for Label, Name, Behavior, OnClick JavaScript, Display Type, and Description. The OnClick JavaScript field contains the code provided in the previous block. The 'Created By' and 'Modified By' fields both list Vishwanath Bommalapur with timestamps from 2/27/2014. Action buttons for Edit, Delete, and 'Where is this used?' are present at the top and bottom of the detail section.

## DBSYNC DATASHEET

**Label:** Update Invoice from QBOE\_New

**Behavior:** Execute JavaScript

**Display Type:** Detail Page Button

**OnClick JavaScript:** var

```
URL="{!$User.AVSFQB__QBOE_DBSync_Server__c}/qboe.m?sfUrl={!$Api.Partner_Server_URL_140}&qboeCT={!$User.AVSFQB__QBOE_Connection_Ticket__c}&pd=processdefinition_QBSF_InvoiceToInvoice.xml&recordId={!Opportunity.Id}&dbsyncId={!$User.AVSFQB__DBSync_Id__c}&profileName={!$User.AVSFQB__DBSync_Profile__c}&sessionId={!$Api.Session_ID}&dbsyncPasswd={!$User.AVSFQB__DBSync_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'. The main content area displays the configuration for a custom button or link named 'Update Invoice from QBOE\_New'. The configuration details are as follows:

Custom Button or Link Detail	
Label	Update Invoice from QBOE_New
Name	Update_Invoice_from_QBOE_New
Behavior	Execute JavaScript
OnClick JavaScript	var URL="{!\$User.AVSFQB__QBOE_DBSync_Server__c}/qboe.m?sfUrl={!\$Api.Partner_Server_URL_140}&qboeCT={!\$User.AVSFQB__QBOE_Connection_Ticket__c}&pd=processdefinition_QBSF_InvoiceToInvoice.xml&recordId={!Opportunity.Id}&dbsyncId={!\$User.AVSFQB__DBSync_Id__c}&profileName={!\$User.AVSFQB__DBSync_Profile__c}&sessionId={!\$Api.Session_ID}&dbsyncPasswd={!\$User.AVSFQB__DBSync_Passwd__c}"; window.open(URL,"DBSync", "menubar=0,resizable=0,width=650,height=300");
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.

## DBSYNC DATASHEET

- Under the Page Layout drag the fields specified below to add it in Page Layout.
  - Fields: "Quickbooks Id", "Primary Contact", "Generate", "QB Error"
  - Buttons: "Update Opportunity To QBOE\_New", "Update Invoice from QBOE\_New"

The screenshot displays the dbsync web application interface. The top navigation bar includes 'Home', 'DbSync Setup', 'Accounts', 'Opportunities', 'Products', 'Invoice', 'Reports', 'Dashboards', and 'DBSync Batch Process'. The main content area shows the 'Opportunity Detail' for 'Opp\_Vish'. The 'DBSync' section at the bottom contains several buttons and fields, with red boxes highlighting 'Generate Quickbooks Id', 'QB Error Primary Contact', and the 'Update Opportunity To QBOE\_New' and 'Update Invoice from QBOE\_New' buttons.

- Move Invoices from the Opportunity Related List to the page layout.

## DBSYNC DATASHEET

- 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'.

The screenshot displays the DBSync web application interface. At the top, there is a search bar and user information for Vishwanath Bomma... with a 'QuickBooks Integration' button. The navigation menu includes Home, DbSync Setup, Accounts, Opportunities (selected), Products, Invoice, Reports, Dashboards, and DBSync Batch Process. The sidebar on the left shows 'Recent Items' with links to DBSync21, Jack Rogers, GenePoint, Avankia, DBSync1, and 000000034, along with a 'Recycle Bin' button. The main content area is titled 'Opportunity DBSync21' and includes a 'Show Feed' button and a breadcrumb trail: 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). The 'Opportunity Detail' section contains fields for Opportunity Owner (Vishwanath Bommalapur), Private (checkbox), Opportunity Name (DBSync21), Account Name (Avankia), Type, Lead Source, Order Number, Current Generator(s), Tracking Number, Created By (Vishwanath Bommalapur, 2/25/2014 7:45 AM), Description, and Custom Links (Delivery Status). Financial fields include Amount (\$50,000.00), Expected Revenue (\$50,000.00), Close Date (2/25/2014), Next Step, Stage (Closed Won), Probability (%) (100%), Primary Campaign Source, Main Competitor(s), and Delivery/Installation Status. The 'DBSync' section has buttons for 'Generate' and 'QB Error', and a 'Primary Contact' field. A 'Chat' button is also present. At the bottom, the 'Related List' section is titled 'Invoice' (highlighted with a red box) and includes a 'New Invoice' button. Below this is a table with the following data:

Action	Invoices	Invoice Number	Total Invoice Amount	Payments	Balance	Days Outstanding	Sync Date
Edit   Del	000000037	5	\$50,000.00	\$0.00	\$50,000.00	1	2/25/2014 8:01 AM

## DBSYNC DATASHEET

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

The screenshot displays the Salesforce interface for the dbsync application. The top navigation bar includes the dbsync logo, a search bar, and user information (Vishwanath Bomma...). The main navigation menu shows 'Home', 'DbSync Setup', 'Accounts', 'Opportunities', 'Products', 'Invoice', 'Reports', 'Dashboards', and 'DBSync Batch Process'. The 'Opportunities' tab is active, showing a record for 'GenWatt Diesel 200kW for DBSync21'. The record details include:

Opportunity Product Detail	
Opportunity	DBSync21
Product	GenWatt Diesel 200kW
Product Code	GC1040
List Price	\$25,000.00
Sales Price	\$25,000.00
Quantity	2.00
Date	2/25/2014
Total Price	\$50,000.00

Below the product details, the 'QBSync' section is visible, with the 'Quickbooks Id' field highlighted in red. The record was created by Vishwanath Bommalapur on 2/25/2014 at 7:47 AM and last modified by the same user at the same time. The line description is 'DBSync Avankia'.

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## DBSYNC DATASHEET

- New Button "Update Product To QBOE\_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 QBOE\_New

**Behavior:** Execute JavaScript

**Display Type:** Detail Page Button

**OnClick JavaScript:** var URL

```
="{!$User.AVSFQB__QBOE_DBSync_Server__c}/qboe.m?sessionId={!$Api.Session_ID}&sfUrl={!$Api.Partner_Server_URL_140}&qboeCT={!$User.AVSFQB__QBOE_Connection_Ticket__c}&pd=processdefinition_SFQB_Item.xml&recordId={!Product2.Id}&dbsyncId={!$User.AVSFQB__DBSync_Id__c}&profileName={!$User.AVSFQB__DBSync_Profile__c}&dbsyncPasswd={!$User.AVSFQB__DBSync_Passwd__c}";
window.open(URL,"DBSync","menubar=0,resizable=0,width=650,height=300");
```

The screenshot shows the 'Product Custom Button or Link' configuration page for 'Update Product to QBOE\_New'. The page includes a navigation menu with options like Home, DbSync Setup, Accounts, Opportunities, Products, Invoice, Reports, Dashboards, and DBSync Batch Process. The main content area displays the 'Custom Button or Link Detail' with the following information:

Field	Value
Label	Update Product to QBOE_New
Name	Update_Product_to_QBOE_New
Behavior	Execute JavaScript
Display Type	Detail Page Button
OnClick JavaScript	var URL="{!\$User.AVSFQB__QBOE_DBSync_Server__c}/qboe.m?sessionId={!\$Api.Session_ID}&sfUrl={!\$Api.Partner_Server_URL_140}&qboeCT={!\$User.AVSFQB__QBOE_Connection_Ticket__c}&pd=processdefinition_SFQB_Item.xml&recordId={!Product2.Id}&dbsyncId={!\$User.AVSFQB__DBSync_Id__c}&profileName={!\$User.AVSFQB__DBSync_Profile__c}&dbsyncPasswd={!\$User.AVSFQB__DBSync_Passwd__c}"; window.open(URL,"DBSync","menubar=0,resizable=0,width=650,height=300");
Description	
Created By	Vishwanath Rommalapur, 2/27/2014 8:11 AM
Modified By	Vishwanath Rommalapur, 2/27/2014 2:59 PM

- Go to Setup ➡ Customize ➡ Product ➡ 'Page Layout' fields to add is "QuickBooks Item type", "QuickBooks Id", "QB Error", "COGS" and "OnHand" and Buttons "Update Product To QBOE\_New" to the page layout.

The screenshot shows the 'Product Detail' page for 'GenWatt Diesel 200kW'. The page includes a navigation menu with options like Home, DbSync Setup, Accounts, Opportunities, Products, Invoice, Reports, Dashboards, and DBSync Batch Process. The main content area displays the 'Product Detail' with the following information:

Field	Value
Product Name	GenWatt Diesel 200kW
Product Code	GC1040
Created By	Vishwanath Rommalapur, 5/1/2013 10:21 AM
Last Modified By	Vishwanath Rommalapur, 2/26/2014 12:33 PM

The 'DBSync' section is expanded, showing the following fields:

Field	Value
QuickBooks Item Type	
Quickbooks Id	COGS
QB Error	
OnHand	

## DBSYNC DATASHEET

- 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"

## DBSync Profile Setup:

- Go to mydbsync.com & register for Free Trial. Ensure that Source & Target Adapters are Salesforce & QuickBooks Online respectively.

db sync

Go Back

One - Step Away from Simplifying Your Life

See Comparison between Free and Paid Version

First Name\*

Last Name\*

Company\*

Email\*

Password\*

Phone\*

Source Adapter\*

Salesforce

Target Adapter\*

QuickBooks Online

Check you are not a machine

Refresh Captcha

Read License Agreement (EULA)

I understand and agree to the above statement

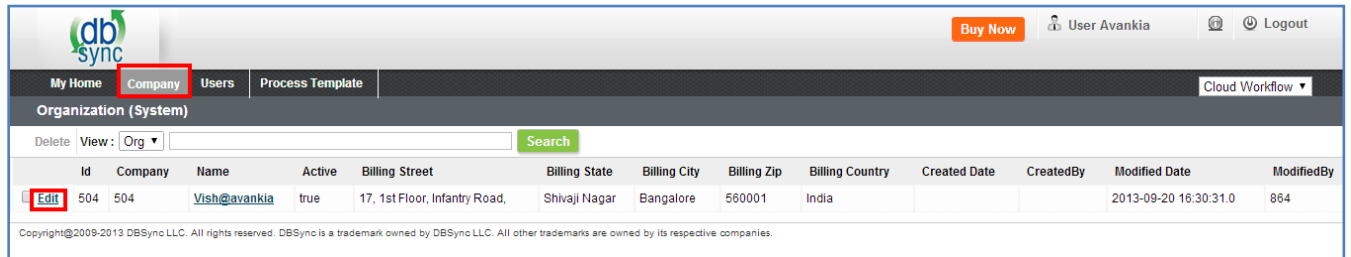
Register

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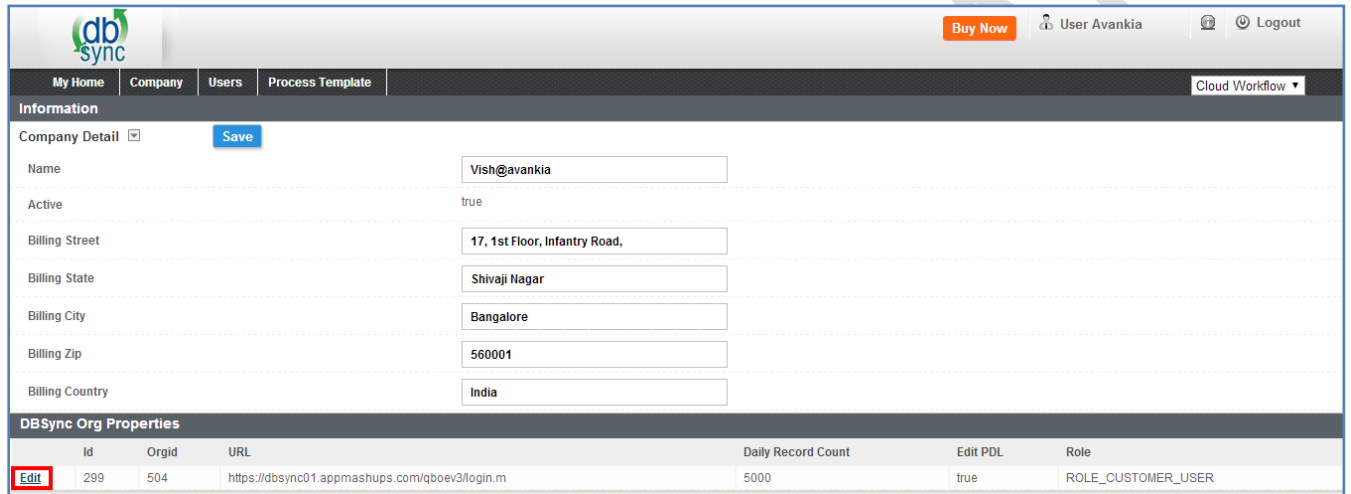
## DBSYNC DATASHEET

- Login using to dbsync account, go to *Company* tab, click on *edit* to view DBSync Org Properties. Click on *edit* and replace the existing URL with <https://dbsync01.appmashups.com/qboev3/login.m>



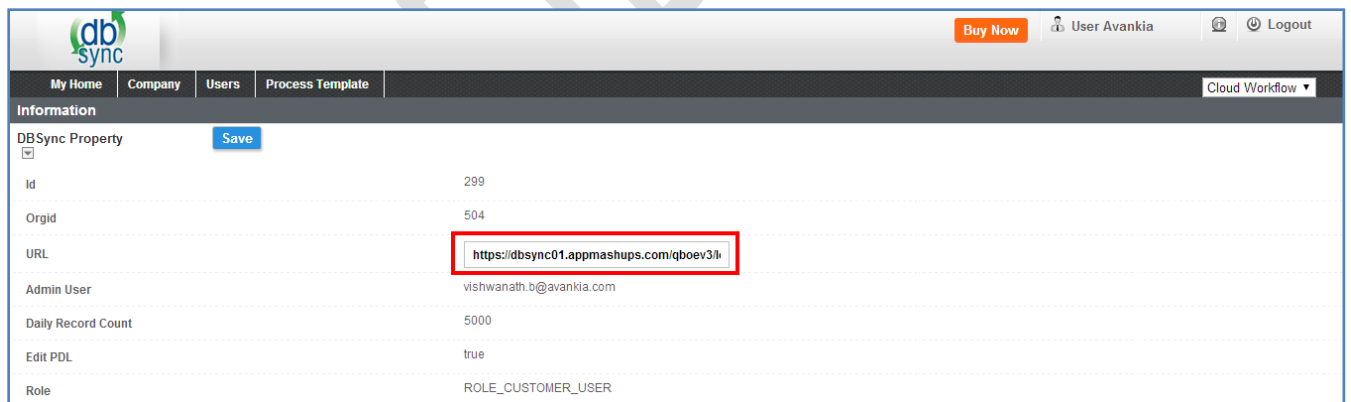
The screenshot shows the DBSync web application interface. The top navigation bar includes the DBSync logo, a 'Buy Now' button, and user information for 'User Avankia' with a 'Logout' button. The main navigation tabs are 'My Home', 'Company', 'Users', and 'Process Template'. The 'Company' tab is selected. Below the navigation is the 'Organization (System)' section with a search bar and a table of companies. The table has columns: Id, Company, Name, Active, Billing Street, Billing State, Billing City, Billing Zip, Billing Country, Created Date, CreatedBy, Modified Date, and ModifiedBy. The first row is highlighted, and the 'Edit' button in the first column is circled in red.

Id	Company	Name	Active	Billing Street	Billing State	Billing City	Billing Zip	Billing Country	Created Date	CreatedBy	Modified Date	ModifiedBy
504	504	Vish@avankia	true	17, 1st Floor, Infantry Road,	Shivaji Nagar	Bangalore	560001	India			2013-09-20 16:30:31.0	864



The screenshot shows the 'Company Detail' form in the DBSync web application. The form fields include: Name (Vish@avankia), Active (true), Billing Street (17, 1st Floor, Infantry Road,), Billing State (Shivaji Nagar), Billing City (Bangalore), Billing Zip (560001), and Billing Country (India). Below the form is the 'DBSync Org Properties' table. The table has columns: Id, Orgid, URL, Daily Record Count, Edit PDL, and Role. The first row is highlighted, and the 'Edit' button in the first column is circled in red.

Id	Orgid	URL	Daily Record Count	Edit PDL	Role
299	504	https://dbsync01.appmashups.com/qboev3/login.m	5000	true	ROLE_CUSTOMER_USER



The screenshot shows the 'DBSync Property' form in the DBSync web application. The form fields include: Id (299), Orgid (504), URL (https://dbsync01.appmashups.com/qboev3/login.m), Admin User (vishwanath.b@avankia.com), Daily Record Count (5000), Edit PDL (true), and Role (ROLE\_CUSTOMER\_USER). The URL field is highlighted with a red box.

- Go to *Process Template* tab in DBSync home page and click on *SalesforceQuickBooksOnline:BiDirectional* to include process template for Bi-directional Integration of Salesforce & QuickBooks Online.
- Click on *Launch* in My Home tab, you will see *SalesforceQuickBooksOnline:BiDirectional* profile in the next tab of your browser.

## DBSYNC DATASHEET

- Click on *Quick Start* to configure Salesforce & QuickBooks Adapters

### Configure Salesforce Adapter:

Enter Salesforce Username, Password & Security Token. Click on *Save Properties* to save the settings. Click on *Validate* to confirm the Salesforce connections settings are valid.

The screenshot shows the 'DBSync Quick Start' window. On the left is a navigation menu with options: Salesforce (highlighted with a red box), ConsoleAdapter, QuickBooksOnline, Advanced Properties, Validate Process, Initial Setup, and AccountToCustomer. The main area is titled 'Name: SalesforceAdapter' and 'Type: Salesforce Adapter'. It contains a list of configuration fields, each with a help icon (i) and a red error indicator (•) next to it. The fields and their values are: 'username' (vishwanath.b@avankia.com), 'password' (masked with dots), 'securityToken' (4iHiy8mxy9DJ3jVwQF8mQy1F), 'endpoint' (https://www.salesforce.com/services/Soap/u/20.0), 'sid', 'proxyHost', 'proxyPort', 'proxyUsername', 'proxyPassword', 'transport.compression', 'acceptGzip', and 'sendGzip'. At the bottom right of the main area, there are two buttons: 'Save Properties' and 'Validate', both highlighted with a red box. At the bottom of the window, there are 'Previous' and 'Continue' buttons. The 'db sync' logo is in the bottom left corner.

**Configure QuickBooks Online Adapter:**

Go to QuickBooks Online Connection properties, click on *Configuration link*, which will take you to new tab to authorize Intuit to securely share your data to DBSync QBRv3.

The screenshot shows the DBSync Quick Start interface. On the left sidebar, the 'QuickBooksOnline' option is selected and highlighted with a red box. The main content area is titled 'Edit Properties' and contains a 'Connection Properties' form. The form includes the following fields:

- Name: QuickBooksOnlineAdapter
- Type: QuickBooks Online Rest Adapter
- OAuthKey\_App: [Text Input]
- OAuthSecret\_App: [Text Input]
- OAuthKey\_User: [Text Input]
- OAuthSecret\_User: [Text Input]
- realmId: [Text Input]
- Datasource: QBO
- OAuth\_Last\_Updated: [Text Input]
- OAuth: Configuration Link (highlighted with a red box)

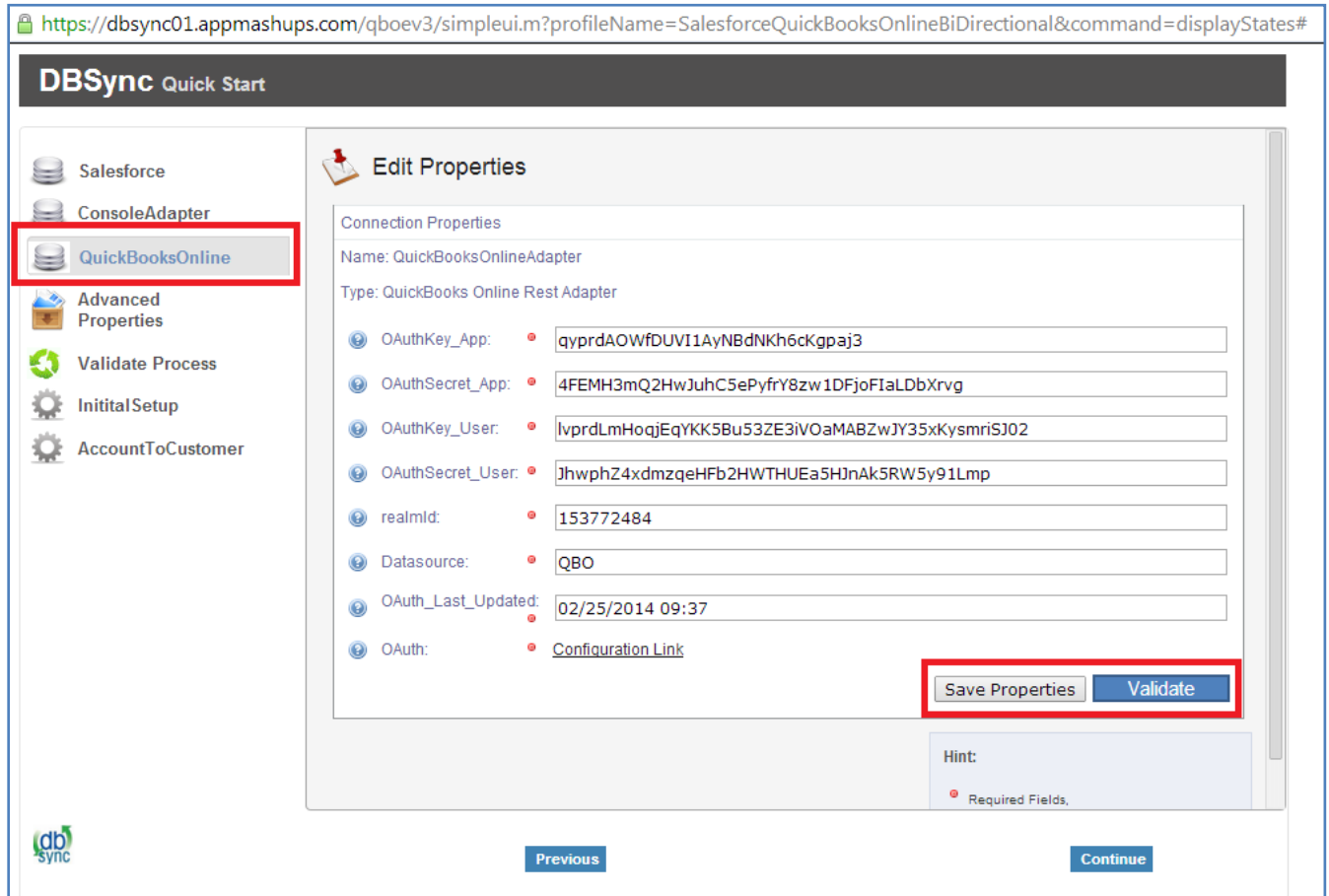
At the bottom right of the form, there are 'Save Properties' and 'Validate' buttons. Below the form, there is a 'Hint' section with a red dot and the text 'Required Fields,'. At the bottom of the interface, there are 'Previous' and 'Continue' buttons.

Click on *Authorize* to continue. Confirmation email will be displayed as “*Your QuickBooks Online is now connected with the Profile. Please close this window now*”.

The screenshot shows an Intuit authorization window. At the top left is the Intuit logo, and at the top right is the text "Welcome, Rajeev Gupta (Not you?)". The main heading reads "DBSync QBRv3 would like to access your Intuit company data". Below this, a grey bar contains the Avankia logo on the left and the DBSync QBRv3 logo on the right, with five dots between them. The text "Authorize Intuit to securely share your data to DBSync QBRv3." is displayed. To the right of this text is a security message: "Your data is safe. DBSync QBRv3 is a certified Intuit partner. Learn how Intuit protects your data". At the bottom left, there is a yellow "Authorize" button with a red border, and a blue link "No, Thanks" next to it. The footer contains the copyright notice "© 2014 Intuit, Inc. All rights reserved.".

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Go to DBSync Quick Start, all the QuickBooks Online Adapter Connection properties fields will be auto populated. Click on *Save Properties* of to save the settings. Click on *Validate* to confirm the QuickBooks Online connections settings are valid.



## Running the Integration:

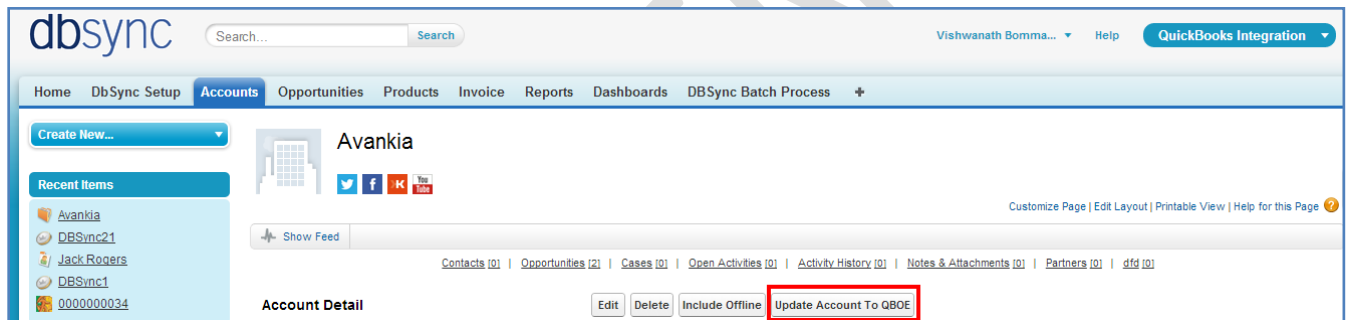
DBSync Integration of Salesforce & QuickBooks Online can be initiated by the following three methods.

- **Using Salesforce custom buttons:**
- **Using DBSync Scheduler:**

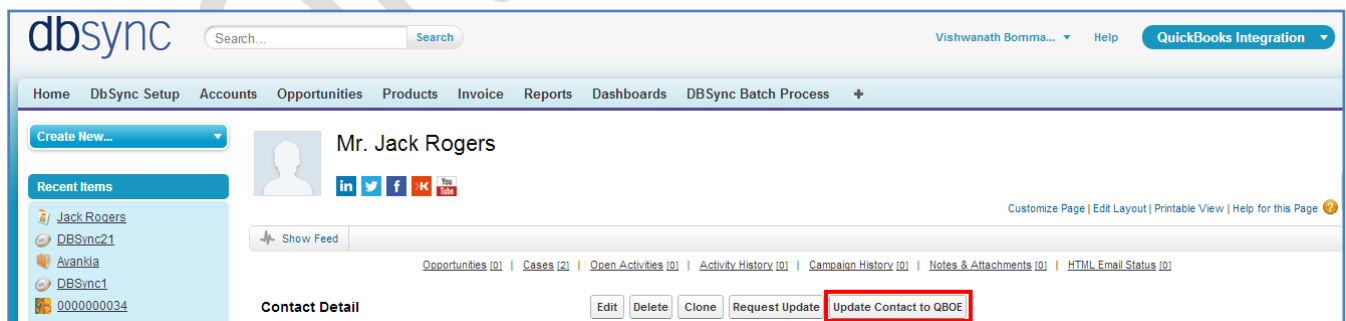
### Using Salesforce custom buttons:

Salesforce custom buttons in Salesforce Accounts, Contacts and Opportunity can be used to update these specific records into QuickBooks as and when required. To set Auto run of integration, one of the next methods should be used.

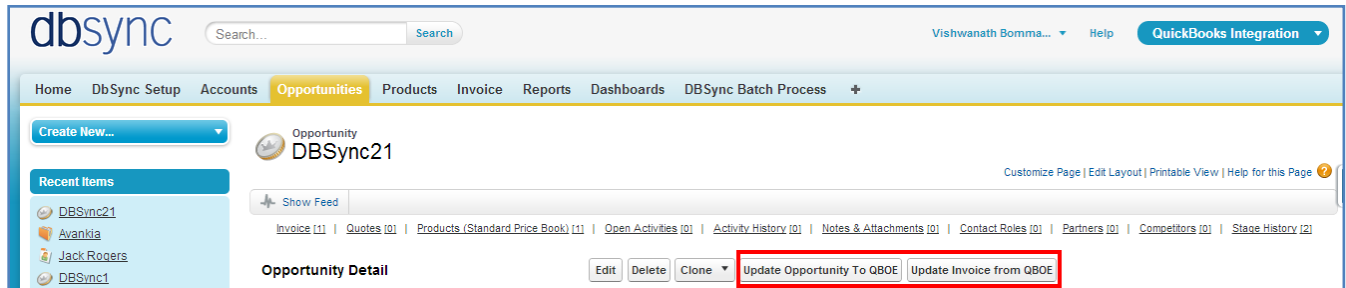
Salesforce Custom Button **Update Account to QBOE** in Accounts Object is shown below.



Salesforce Custom Button **Update Contact to QBOE** in Contacts Object is shown below.



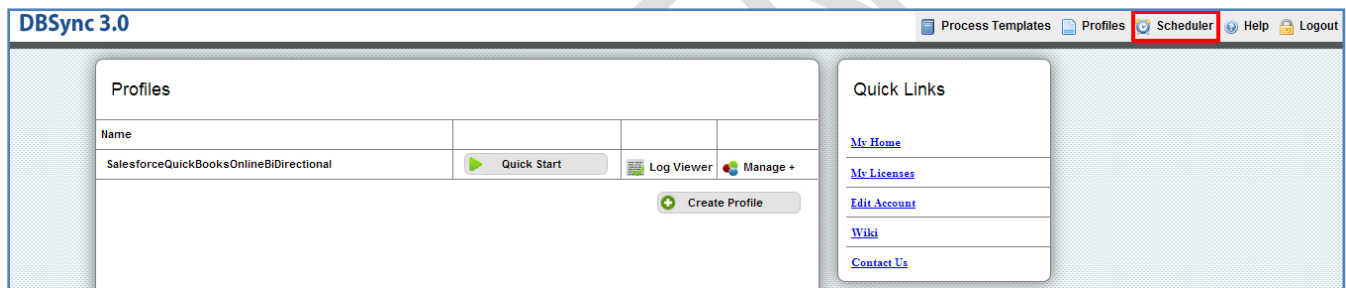
Salesforce Custom Button **Update Opportunity to QBOE** and **Update Invoice from QBOE** in Opportunities Object is shown below.



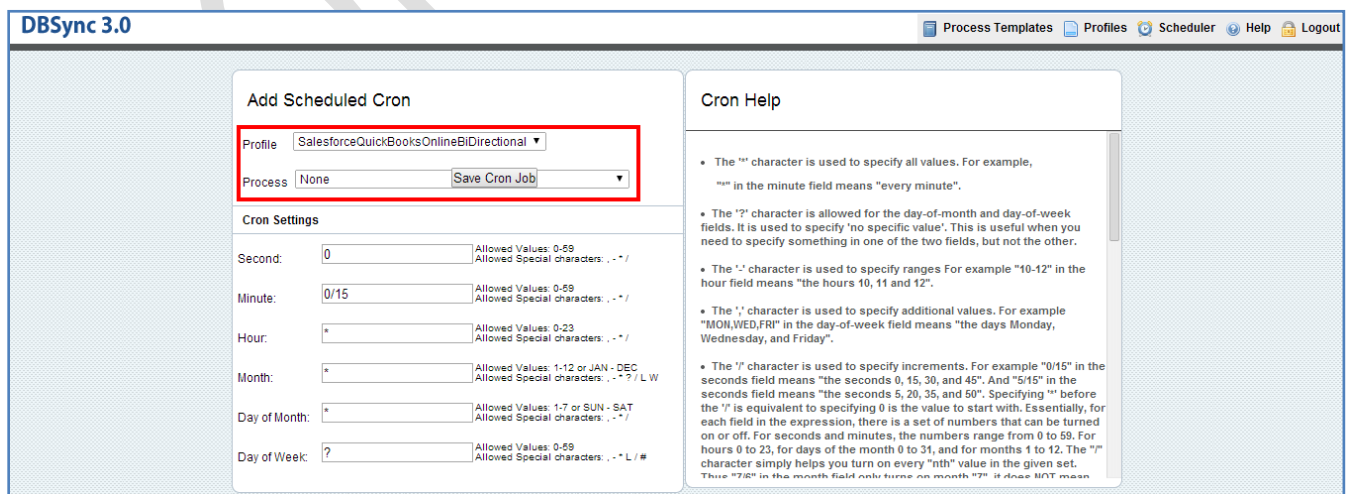
### Using DBSync Scheduler:

Scheduler available in DBSync Account can be used to schedule the integration.

Login to DBSync account, click on *Launch* to go to DBSync profile page and click on *Scheduler* on the top right corner.



Select the integration *profile* and required *process* to auto run. Edit the *Cron Settings* to set the frequency of Auto run and *Save Cron Job*.



**DBSync LLC**

750 Old Hickory Blvd.  
Bldg 2, Suite 150  
Brentwood TN 37027  
U.S.A

Email

[sales@avankia.com](mailto:sales@avankia.com)

Phone/Fax

1-877-739-2818

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