

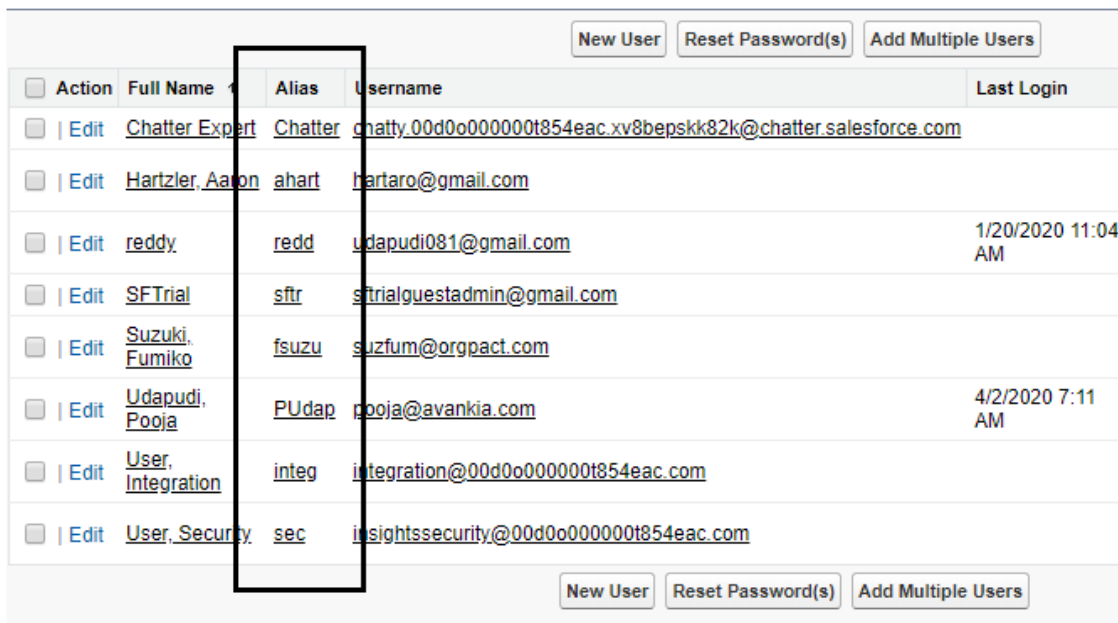
Account Owner Mapping

Requirement:

If you require to map the Salesforce Account Owner to the REP field on the Customer level in QuickBooks.

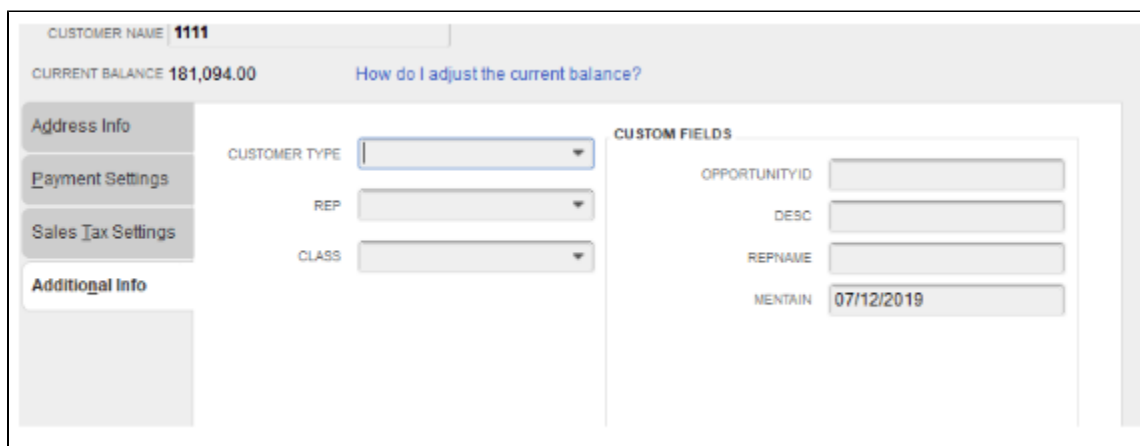
Solution:

Before starting with the mappings the user alias name present in Salesforce should also be present in QuickBooks field named "Rep" at the customer level.



☐	Action	Full Name	Alias	Username	Last Login
☐	Edit	Chatter Expert	Chatter	chatty_00d0o000000t854eac.xv8bepskk82k@chatter.salesforce.com	
☐	Edit	Hartzler, Aaron	ahart	ahartaro@gmail.com	
☐	Edit	reddy	redd	Udapudi081@gmail.com	1/20/2020 11:04 AM
☐	Edit	SFTrial	sfttr	sfttrialguestadmin@gmail.com	
☐	Edit	Suzuki, Fumiko	fsuzu	suzfum@orgpact.com	
☐	Edit	Udapudi, Pooja	PUdap	pooja@avankia.com	4/2/2020 7:11 AM
☐	Edit	User, Integration	integ	integration@00d0o000000t854eac.com	
☐	Edit	User, Security	sec	insightssecurity@00d0o000000t854eac.com	

Fig 1: Alias name in Salesforce



CUSTOMER NAME **1111**

CURRENT BALANCE **181,094.00** [How do I adjust the current balance?](#)

Address Info

Payment Settings

Sales Tax Settings

Additional Info

CUSTOMER TYPE

REP

CLASS

CUSTOM FIELDS

OPPORTUNITYID

DESC

REPNAME

MENTAIN

Fig 2: Rep field where the Alias name to be provided

Below mentioned steps to update the DBSync mappings

1. Add the "Account.Owner.Alias" API name in the DBSync query.

```
select
Account.Phone,Account.Name,AVSFQB__Primary_Contact__r.FirstName,AVSFQB__Primary_Contact__r.LastName,Account.BillingStreet,Account.BillingCity,Account.BillingCountry,Account.BillingPostalCode,Account.BillingState,Account.Accounting_Email_Address__c,AVSFQB__Primary_Contact__r.Email,Account.Fax,Account.Price_Level__c,Opportunity.Today_s_Date__c,Account.ShippingStreet,Account.ShippingCity,Account.ShippingCountry,Account.ShippingPostalCode,Account.ShippingState,Name,AVSFQB__QuickBooks_Id__c,AVSFQB__Billing_Address__c,AVSFQB__Billing_City__c,AVSFQB__Billing_Country__c,AVSFQB__Billing_Zip__c,AVSFQB__Billing_State__c,Estimated_Ship_Date__c,AVSFQB__PO_Number__c,Owner.Alias,AVSFQB__Shipping_Address__c,AVSFQB__Shipping_City__c,AVSFQB__Shipping_Country__c,AVSFQB__Shipping_Zip__c,AVSFQB__Shipping_State__c,CloseDate,Id,Account.AVSFQB__QuickBooks_Id__c,Account.Id,Account.Owner.Alias,(select Id,Description,PricebookEntry.Product2.Bin__c,PricebookEntry.Product2.Site__c,ProductCode,PricebookEntry.Product2.AVSFQB__QuickBooks_ItemType__c,Quantity,UnitPrice,PricebookEntry.Product2.Name from OpportunityLineItems)
FROM Opportunity where Opportunity.AVSFQB__Generate_Object__c='SalesOrder'
and AVSFQB__Products_Count__c > 0
```

Fig 3: DBSync Query

2. In the rules section, click on "Map" for the 1st rule (customer creation rule).
3. Update the mappings for SalesRepRef field by **VALUE("Account/Owner/Alias")**

The screenshot shows a configuration interface for the 'SalesRepRef' field. At the top, there is a 'Loop Over' button and a 'Select Field' dropdown menu. Below this, there are three rows of configuration:

Field	Value
Validate Loop	"true"
FullName	VALUE("Account/Owner/Alias")
ListID	

Fig 4: SalesRepRef field mapping

4. Save and close. Save the workflow. The above changes will work only for the newly created accounts in Salesforce. But if you want the changes to reflect for the historical accounts then need to create a new rule (Update rule). Please find the below steps to create an update rule for updating the account owner to customers who have already synced to QuickBooks.

- Click on "Add New Rule"
- Select the appropriate target connector, operation, and the target object. (refer the figure below)

[QuickBooks](#)
[Update](#)
[Customer](#)
Using [Map](#)
^ Less

☐ Update Source

Properties

Target Properties

Auto create

false

Batch Size

1

Primary Key(s)

ListID

Update Source Properties

Please check update source.

Fig 5: Creating a New Rule

- Update the mappings as shown in the below screenshot.

VALIDATE ROW

IF(ISEMPTY(VALUE(!Account/AVSFQB__Quickbooks_Id__c)), "false", "true")

(CustomerModRq)

Loop Over
Select Field

Fig 6: Validate Row mappings

JobTypeRef

Loop Over
Select Field

LastName

ListID

VALUE("Account/AVSFQB__Quickbooks_Id__c")

MiddleName

Fig 7: ListID Mapping

SalesRepRef

Loop Over

Select Field

Validate Loop

"true"

FullName

VALUE("Account/Owner/Alias")

ListID

Fig 8: SalesRapRef Mapping

- Save and Close. Save the workflow.

In QuickBooks, the Rep field is 5 characters limit. In Salesforce, we need to make sure the Alias should not be more than 5 characters.