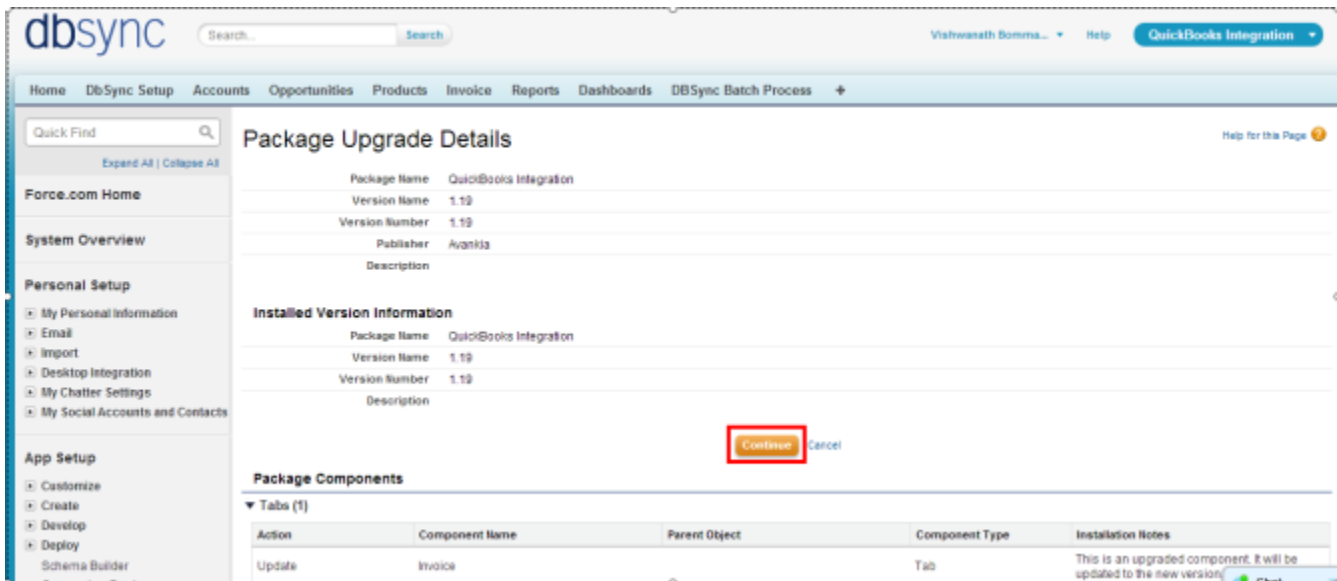


DBSync package (QuickBooks Integration) Installation in Salesforce_

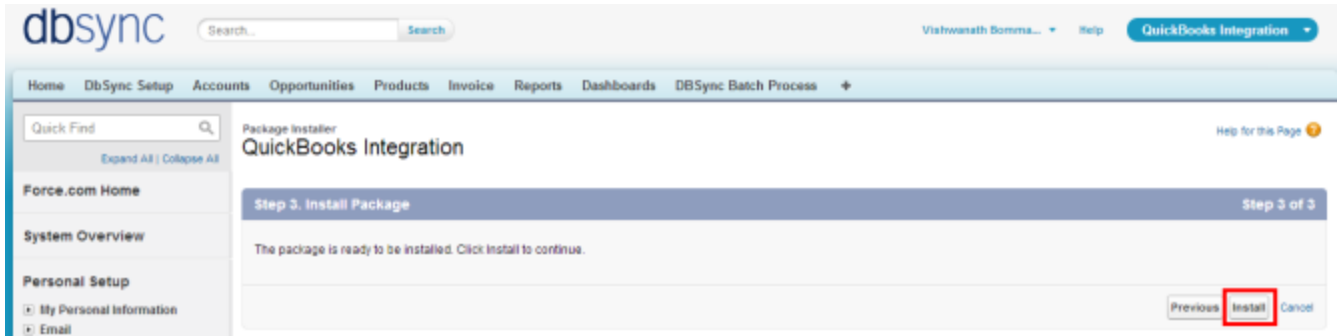
- Click on the below link to install the DBSync App from AppExchange

<https://login.salesforce.com/?startURL=%2Fpackaging%2FinstallPackage.apexp%3Fp0%3D04t600000001gWU&rc=1>.

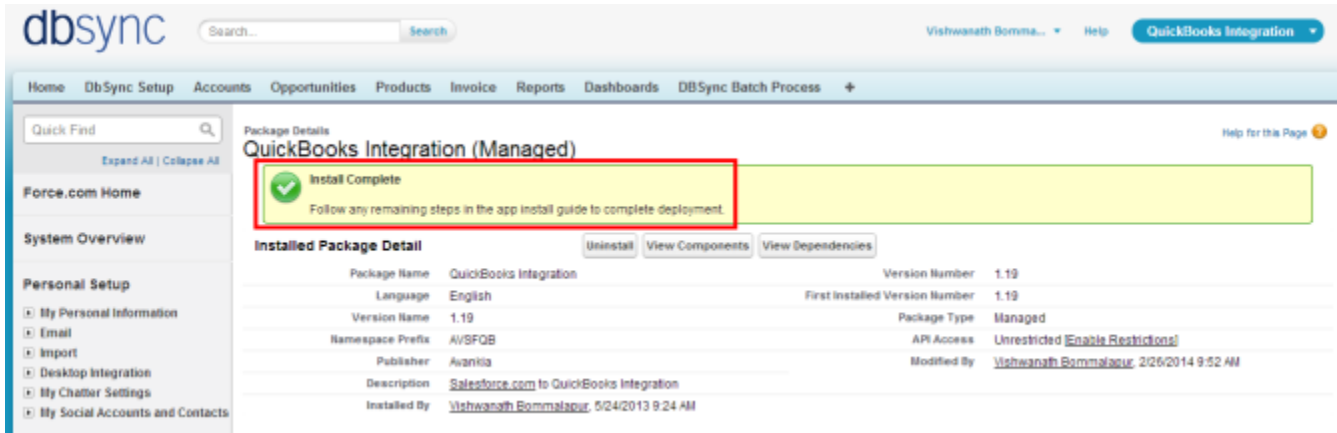
- Enter your Salesforce Username and Password to install DBSync Package in that Salesforce instance. The Salesforce instance must have the administrative privileges to install App.
- DBSync Package Installation Details will be displayed in your Salesforce instance. Click on 'Continue'.



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



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



- 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", "QuickBooks Error"
- Button: " Update Account To QuickBooksOE"

dbsync Search... Search

Vishwanath Bomma... Help QuickBooks Integration

Home DbSync Setup Accounts Opportunities Products Invoice Reports Dashboards DBSync Batch Process +

Create New...

Recent Items

- GenePoint
- Avantra
- Jack Rogers
- DBSync21
- DBSync1
- 0000000034

Recycle Bin

GenePoint

Show Feed

Contacts (2) | Opportunities (3) | Cases (2) | Open Activities (0) | Activity History (0) | Notes & Attachments (0) | Partners (0) | dff (0)

Account Detail

Edit Delete Include Offline Update Account To QBOE

Account Owner	Vishwanath Bommalapur Change	Rating	Cold
Account Name	GenePoint (View Hierarchy)	Phone	(650) 867-3455
Parent Account		Fax	(650) 867-9895
Account Number	CC979213	Website	http://www.genepoint.com
Account Site		Ticker Symbol	
Type	Customer - Channel	Ownership	Private
Industry	Biotechnology	Employees	265
Annual Revenue	\$30,000,000	SIC Code	3712
Billing Address	345 Shoreline Park Mountain View, CA 94043 USA Mountain View, CA	Shipping Address	345 Shoreline Park Mountain View, CA 94043 USA
Customer Priority	Low	SLA	Bronze
SLA Expiration Date	11/27/2012	SLA Serial Number	7324
Number of Locations	1	Upsell Opportunity	Yes
Active	Yes		
Created By	Vishwanath Bommalapur 5/1/2013 10:21 AM	Last Modified By	Vishwanath Bommalapur 2/26/2014 12:15 PM
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

Edit Delete Include Offline Update Account To QBOE

- 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", "QuickBooks Error", "QuickBooksName"
 - Button: " Update Contact To QuickBooksOE"

The screenshot shows the dbsync Salesforce interface. The top navigation bar includes 'Home', 'DbSync Setup', 'Accounts', 'Opportunities', 'Products', 'Invoice', 'Reports', 'Dashboards', and 'DBSync Batch Process'. The user is logged in as 'Vishwanath Bomma...'. The main content area displays the 'Contact Detail' for 'Mr. Jack Rogers'. The 'Contact Detail' tab is active, showing fields like 'Contact Owner', 'Name', 'Account Name', 'Title', 'Department', 'Birthdate', 'Reports To', 'Lead Source', 'Mailing Address', 'Languages', 'Created By', and 'Description'. The 'Update Contact to QBOE' button is highlighted with a red box. Below the 'Contact Detail' tab, the 'DBSync' tab is visible, showing fields like 'Quickbooks Id' and 'QBOE', which are also highlighted with red boxes.

- New Buttons "Update Opportunity To QuickBooksOE_New" and "Update Invoice from QuickBooksOE_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 QuickBooksOE_New

Behavior: Execute JavaScript

Display Type: Detail Page Button

OnClick JavaScript: var URL="{

!\$User.AVSFQuickBooks__QuickBooksOE_DBSync_Server__c)/QuickBooksoe.m?sfUrl={!

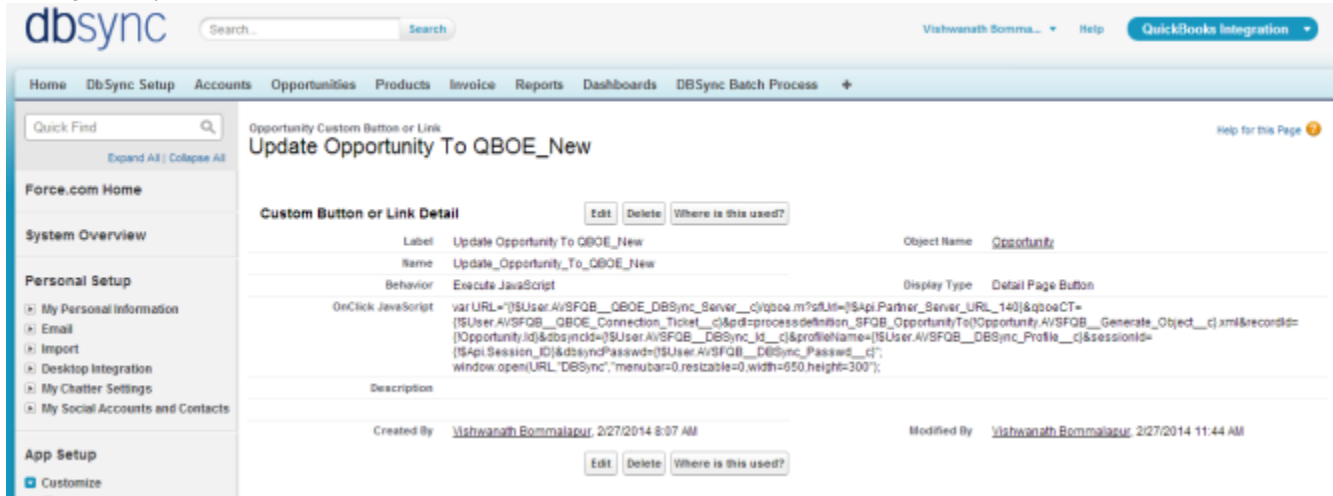
\$Api.Partner_Server_URL_140}&QuickBooksoeCT={

!\$User.AVSFQuickBooks__QuickBooksOE_Connection_Ticket__c}&pdl=processdefinition_SFQuickBooks_OpportunityTo{!Opportunity.AVSFQuickBooks__Generate_Object__c}.xml&recordId={!Opportunity.Id}&dbsyncId={!

`$User.AVSFQuickBooks__DBSync_Idc}&profileName={`

`!$User.AVSFQuickBooks__DBSync_Profile__c}&sessionId=\{!`

`$Api.Session_ID}&dbsyncPasswd={!$User.AVSFQuickBooksDBSync_Passwd_c}"; window.open(URL,"DBSync","menubar=0,resizable=0,width=650,height=300");`



Label: Update Invoice from QuickBooksOE_New

Behavior: Execute JavaScript

Display Type: Detail Page Button

OnClick JavaScript: `var URL="{`

`!$User.AVSFQuickBooks__QuickBooksOE_DBSync_Server__c}/QuickBooksoe.m?sfUrl=\{!`

`$Api.Partner_Server_URL_140}&QuickBooksoeCT={`

`!$User.AVSFQuickBooks__QuickBooksOE_Connection_Ticket__c}&pdl=processdefinition_QuickBooksSF_InvoiceToInvoice.xml&recordId=\{!Opportunity.Id}&dbsyncId=\{!`

`$User.AVSFQuickBooks__DBSync_Idc}&profileName={`

`!$User.AVSFQuickBooks__DBSync_Profile__c}&sessionId=\{!`

`$Api.Session_ID}&dbsyncPasswd={!$User.AVSFQuickBooksDBSync_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 links for Home, DbSync Setup, Accounts, Opportunities, Products, Invoice, Reports, Dashboards, and DBSync Batch Process. The left sidebar contains sections for Force.com Home, System Overview, Personal Setup (with links to My Personal Information, Email, Import, Desktop Integration, My Chatter Settings, and My Social Accounts and Contacts), and App Setup (with a link to Customize). The main content area is titled 'Update Invoice from QBOE_New' and displays a 'Custom Button or Link Detail' table. The table has columns for Label, Name, Behavior, OnClick JavaScript, Display Type, and Description. The 'OnClick JavaScript' field contains a script that uses the QuickBooks API to update an invoice. The 'Display Type' is set to 'Detail Page Button'. The 'Created By' and 'Modified By' fields both show 'Vishwanath Bommalapur' with a timestamp of 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.

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

dbsync Search... Search Vishwanath Somma... Help QuickBooks Integration

Home DbSync Setup Accounts Opportunities Products Invoice Reports Dashboards DBSync Batch Process +

Create New...

Recent Items

- Opp_Vish
- Avantia2014_Vish
- Vishwanath Rommalapur
- Avantia
- DBSync21
- Jack Rogers
- GenePoint
- DBSync1
- 0000000034

Recycle Bin

Opportunity Opp_Vish

Customize Page | Edit Layout | Printable View | Help for this Page

Show Feed

Invoice (0) | Quotes (0) | Products (Standard Price Book) (1) | Open Activities (0) | Activity History (0) | Notes & Attachments (0) | Contact Sales (0) | Partners (0) | Competitors (0) | Stage History (2)

Opportunity Detail

Edit Delete Clone Update Opportunity To QBOE_New Update Invoice from QBOE_New

Opportunity Owner Vishwanath Rommalapur (Change) Amount \$50,000.00

Private Expected Revenue \$50,000.00

Opportunity Name Opp_Vish Close Date 2/27/2014

Account Name Avantia2014_Vish Next Step

Type Stage Closed Won

Lead Source Probability (%) 100%

Primary Campaign Source

Order Number Main Competitor(s)

Current Generator(s) Delivery/Installation Status

Tracking Number

Created By Vishwanath Rommalapur 2/27/2014 8:26 AM Last Modified By Vishwanath Rommalapur 2/27/2014 2:17 PM

Description

Custom Links Delivery Status

DBSync

Generate QB Error

Quickbooks ID Primary Contact

Edit Delete Clone Update Opportunity To QBOE_New Update Invoice from QBOE_New

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

dbsync Search... Search

Vishwanath Somma... Help QuickBooks Integration

Home DbSync Setup Accounts Opportunities Products Invoice Reports Dashboards DBSync Batch Process

Create New...

Recent Items

- DBSync21
- Jack Rogers
- GenePoint
- Avantia
- DBSync1
- 0000000034

Recycle Bin

Opportunity DBSync21

Customize Page | Edit Layout | Printable View | Help for this Page

Show Feed

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)

Opportunity Detail

Edit Delete Clone Update Opportunity To QBOE Update Invoice from QBOE

Opportunity Owner: [Vishwanath Rommalapur](#) (Change) Amount: \$50,000.00

Private Expected Revenue: \$50,000.00

Opportunity Name: DBSync21 Close Date: 2/25/2014

Account Name: [Avantia](#) Next Step

Type Stage: Closed Won

Lead Source Probability (%): 100%

Primary Campaign Source

Order Number Main Competitor(s)

Current Generator(s) Delivery/Installation Status

Tracking Number

Created By: [Vishwanath Rommalapur](#) 2/25/2014 7:45 AM Last Modified By: [Vishwanath Rommalapur](#) 2/25/2014 8:42 AM

Description

Custom Links: [Delivery Status](#)

DBSync

Generate QB Error Chat

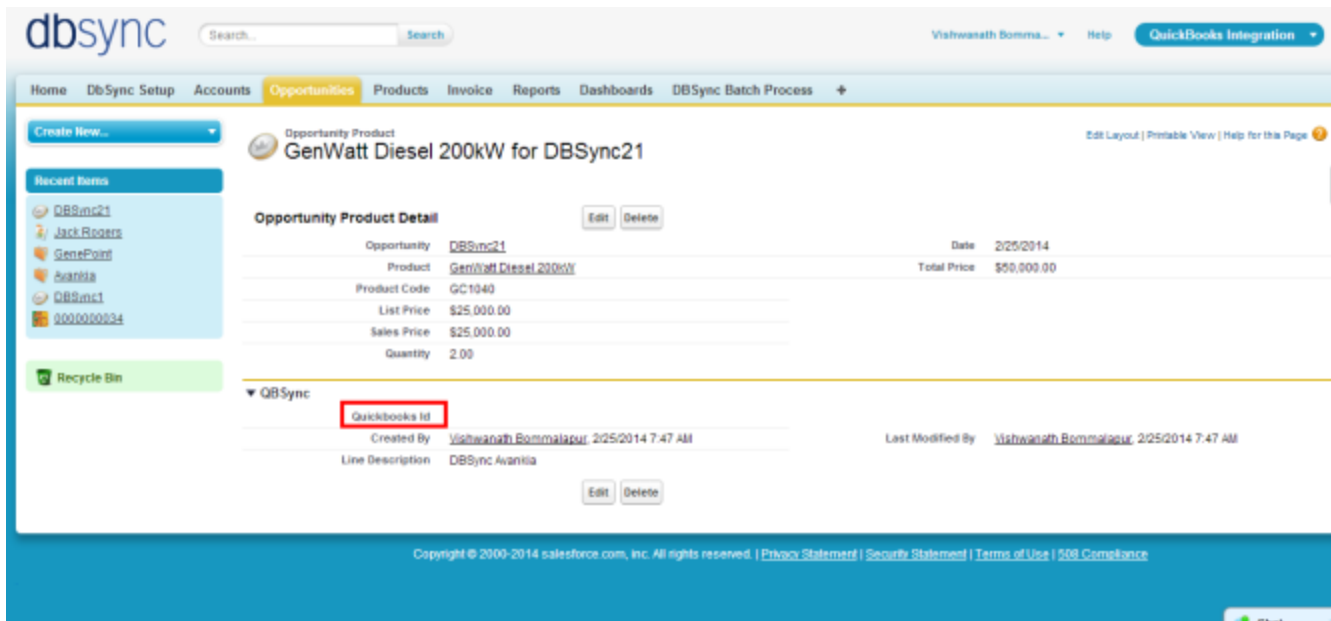
Quickbooks Id Primary Contact

Edit Delete Clone Update Opportunity To QBOE Update Invoice from QBOE

Invoice New Invoice Invoice Help

Action	Invoices	Invoice Number	Total Invoice Amount	Payments	Balance	Days Outstanding	Sync Date
Edit Del	0000000037	5	\$50,000.00	\$0.00	\$50,000.00	1	2/25/2014 8:01 AM

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



- New Button "Update Product To QuickBooksOE_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 QuickBooksOE_New

Behavior: Execute JavaScript

Display Type: Detail Page Button

OnClick JavaScript: var URL ="{"

!\$User.AVSFQuickBooks__QuickBooksOE_DBSync_Server__c)/QuickBooksoe.m?sessionId=\{!

\$Api.Session_ID}&sfUrl={

!\$Api.Partner_Server_URL_140\}&QuickBooksoeCT=\{!

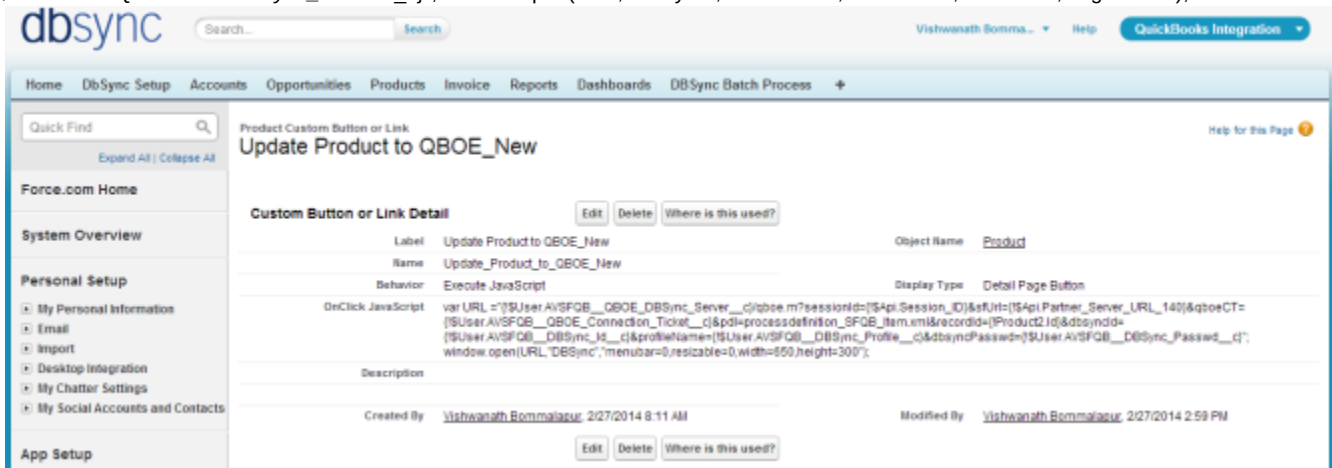
\$User.AVSFQuickBooks__QuickBooksOE_Connection_Ticketc}&pdl=processdefinition_SFQuickBooks_Item.xml&recordId={

!Product2.Id}&dbsyncId={!

\$User.AVSFQuickBooksDBSync_Idc}&profileName={

!\$User.AVSFQuickBooks__DBSync_Profile__c}&dbsyncPasswd={!

\$User.AVSFQuickBooksDBSync_Passwd_c}"; window.open(URL,"DBSync","menubar=0,resizable=0,width=650,height=300");



- Go to Setup



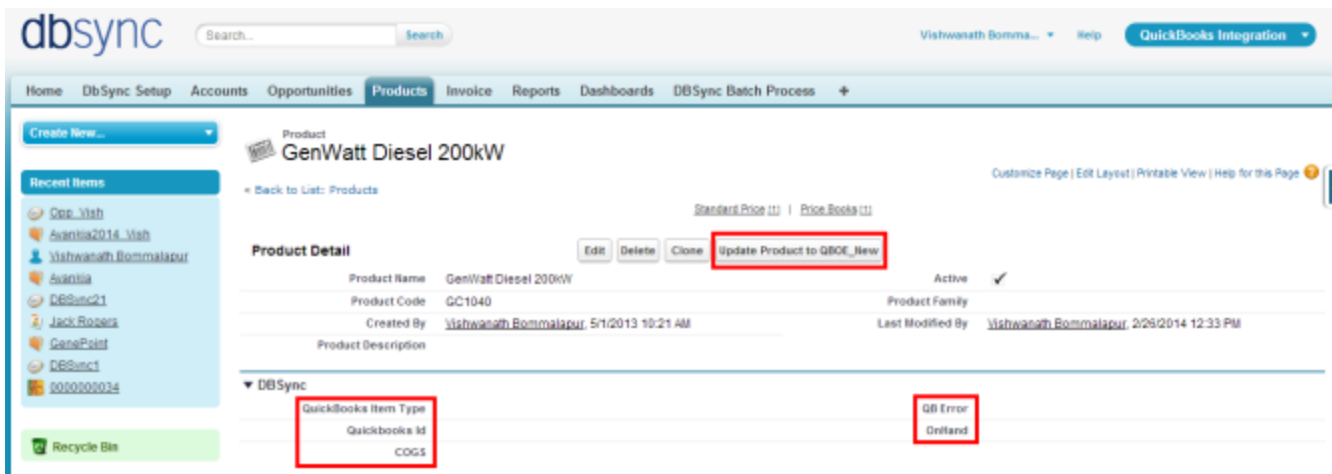
Customize



Product



'Page Layout' fields to add is "QuickBooks Item type" , "QuickBooks Id" , "QuickBooks Error", "COGS" and "OnHand" and Buttons "Update Product To QuickBooksOE_New" to the page layout.



- 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"