Salesforce to QuickBooks Desktop Custom Field Integration on Customer/Vendor

Issue: Salesforce Custom field to QuickBooks Custom field.

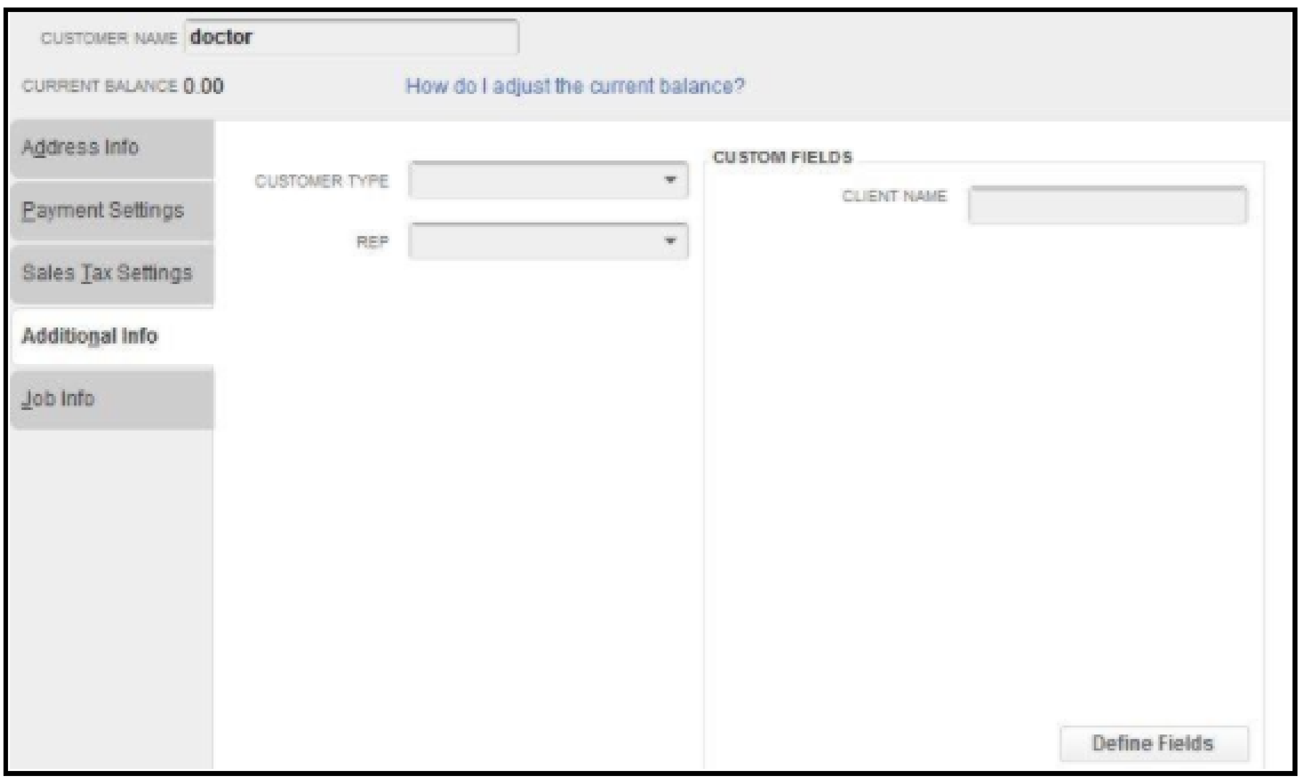
Root Cause: Requirement on mapping Quickbooks desktop Custom field on Customer entity.

Solution:

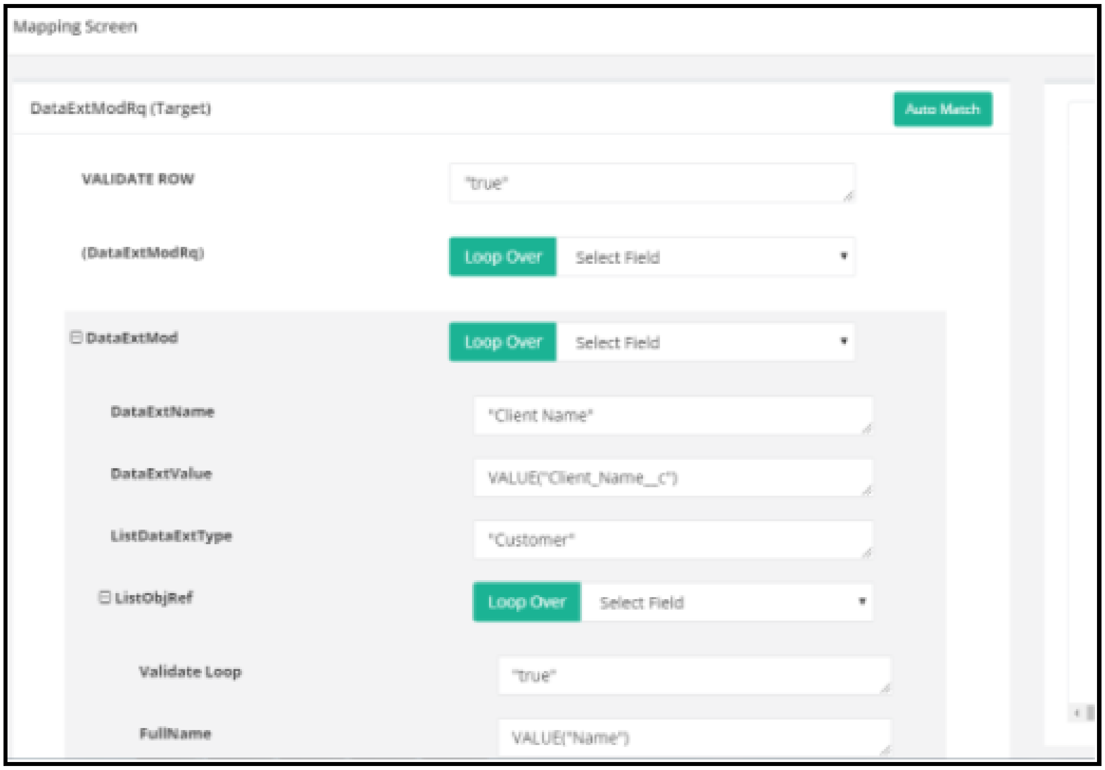
Let’s go through a use case where we have to sync a Salesforce Standard/Custom field to QuickBooks Custom field on either Customer/Vendor entity.

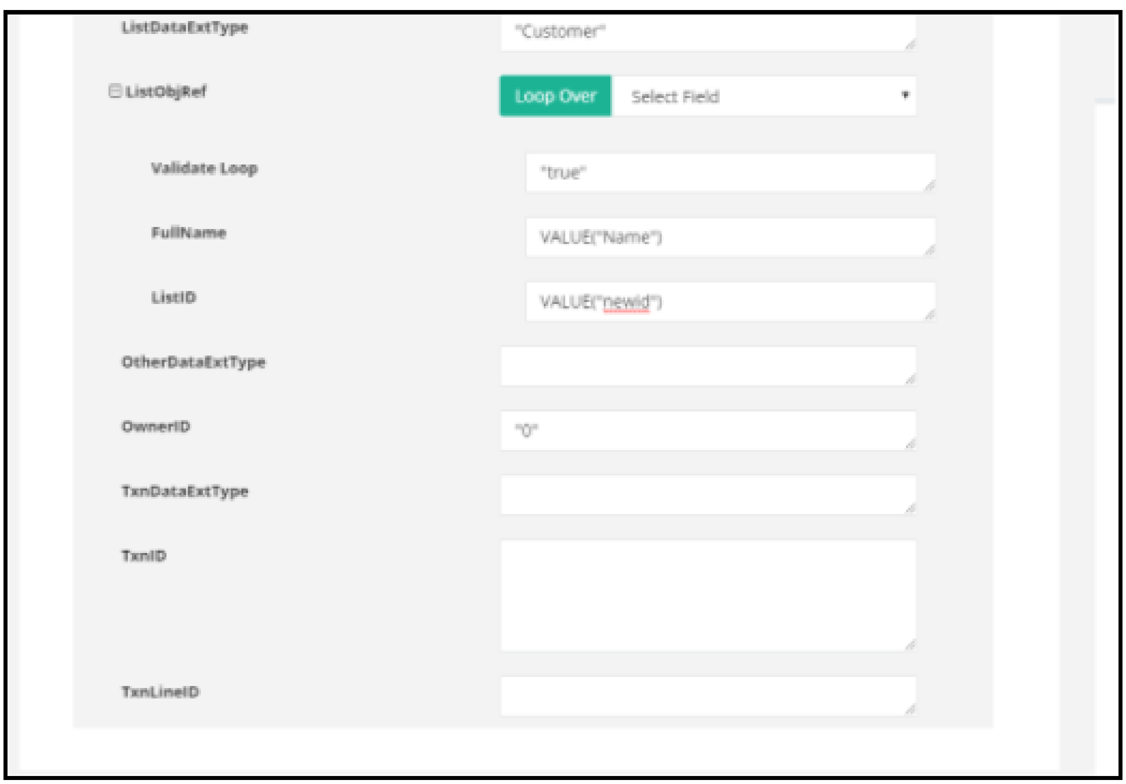
We have a field “Client Name” created in Salesforce. The field has to be synced to a Custom field “CLIENT NAME” in QuickBooks desktop under Customer.

- Create Custom field in QuickBooks by clicking Edit-> Define fields under Additional info tab on the Customer layout as shown below:



- Login into mydbsync.com using your DBSync credentials.
- Create a rule under the desired workflow. Select the target as DataExt and perform Mapping and Writer as Follows:





- Mapping

Seq 1: Client Name in Salesforce to Client Name in QuickBooks:

DataExtModRq/DataExtMod/DataExtName	=	"Client Name"
DataExtModRq/DataExtMod/DataExtValue	=	VALUE("Client_Name__c")
DataExtModRq/DataExtMod/ListDataExtType	=	"Customer"
DataExtModRq/DataExtMod/ListObjRef/FullName	=	VALUE("Name")
OR		
DataExtModRq/DataExtMod/ListObjRef/ListID	=	VALUE("newid")
DataExtModRq/DataExtMod/OwnerID	=	"0"
VALIDATEROW	=	"true"

Explanation of the above mappings:

- DataExtName is the name of the Custom field in QuickBooks.
- DataExtValue is the value of the Salesforce field.
- ListDataExtType is the name of an entity in QuickBooks where the Custom field is added.
- ListObjRef/FullName or ListObjRef/ListID are the reference fields in QuickBooks. We can use either of the mappings.

OwnerId has defaulted to 0.