

SIMPLIFY SALESFORCE AND QUICKBOOKS INTEGRATION: QuickBooks to Salesforce.com

Requirements:

Salesforce Adapter
QuickBooks Adapter

Provider:

DBSync

Provide synchronization between QuickBooks to Salesforce. Data Migration from QuickBooks to Sales force is performed using DbSync where it is defined as a process under a profile.

Use case

- DBSync for Salesforce.com & QuickBooks provides an easy to use application to synchronize Accounts, Contacts, Products and Opportunities to QuickBooks Desktop Customer, Jobs, Products and Invoice.
- The application provides a pre-built field map along with a flexible advance mapping capability and configuration capability. The application also has an automatic online update so you never have to manually upgrade your application.

KEY BENEFITS

- Seamless transfer.
- Ability to implement automated workflows
- Reduced turn-around time.

Process Map

QuickBooks	SalesForce
Customer	Accounts
Customer	Contacts
ItemService	Products
ItemInventory	Products
ItemNonInventory	Products
ItemDiscount	Products
ItemOtherCharge	Products
Invoice	Opportunity
Estimate	Opportunity
Sales Order	Opportunity
Sales Receipt	Opportunity
Credit Memos	Opportunity

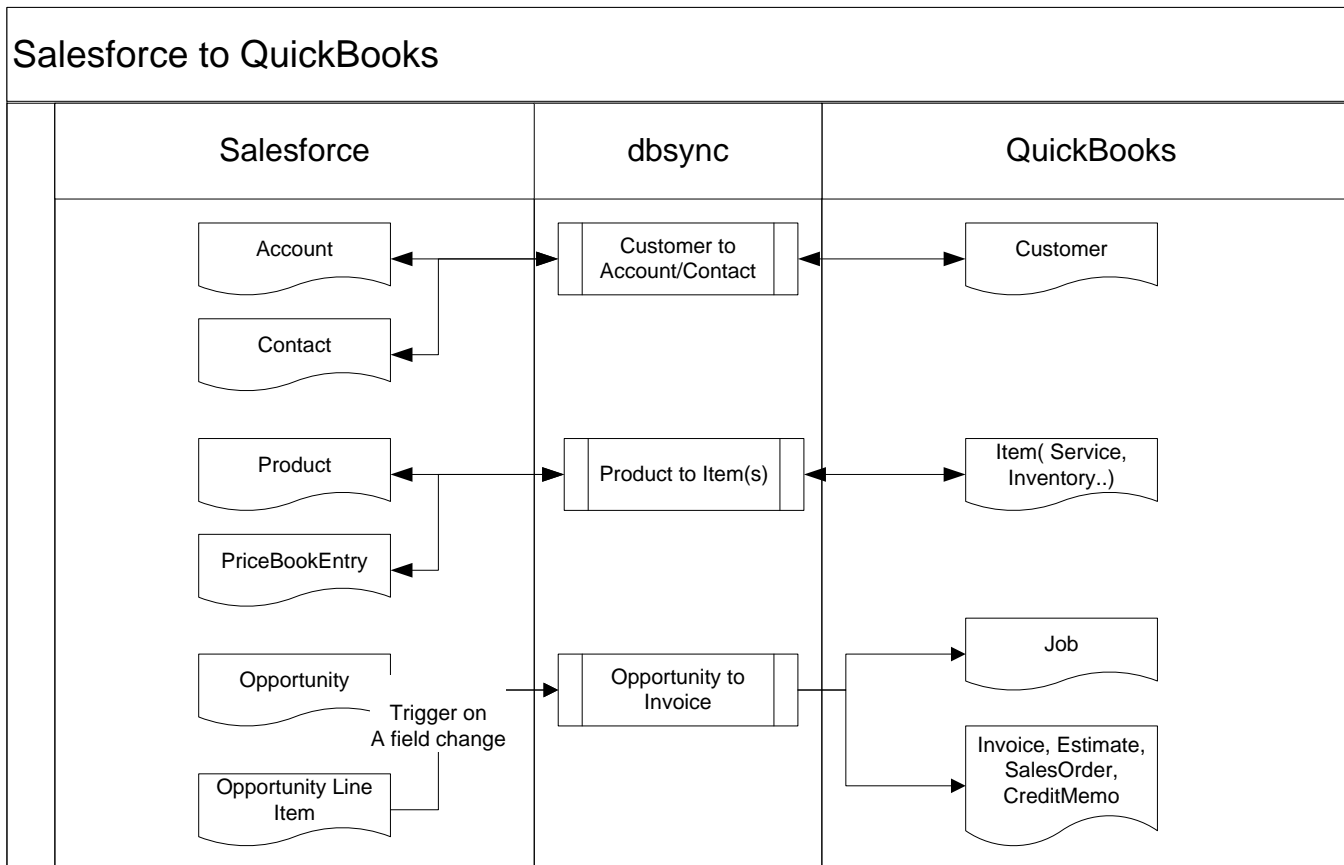
Customer Review

“DBSYNC = Saving Money, Saving Time

We use DB SYNC for our QuickBooks integration. The techs were so helpful! We were setup right away, customized instantly, and when we needed a "special request" had it taken care of by the end of the week. Great product! Our accountant adds ZERO invoices to QB now and save us time AND money. We love Avankia.”

Christie Brugger, VP Sales & Marketing, Custom Toll Free

Business Process Flow



Profile Setup

Salesforce Adpater

Configuration	Instructions
Username	<<Username>>
Password	<<Password>>
EndPoint	Register to see more details
Transport.compression	
sid	
ProxyHost	
ProxyPort	
ProxyUserName	
ProxyPassword	
acceptGzip	
sendGzip	

QuickBooks Adapter

Configuration	Instructions
Filename	Register to see more details
Pdl	
Configuration Link	

Process Mapping

1. Customer → Accounts + Contacts

Activity	Description
Reader	Register to see more details
Writer	
Status Writer	

Mapping:

Source	Target
Task 1	
<u>Customers</u>	<u>Accounts</u>
Register to see more details	

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