HIC GLOBAL SOLUTIONS
Your CRM Success Partners

QB Sync
Made Easy

USER MANUAL

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Preface - An Introduction to the App

Welcome to the user guide for the **QB Sync Made Easy** App! This guide is designed to provide you with a comprehensive overview and step-by-step instructions on how to utilize the app effectively.

Whether you are a small business owner, an accountant, or a financial professional, this integration app will simplify and streamline your financial management processes.

Here is a walkthrough of the Setup, Configuration, and data fields mapping process to get up and running with the app effortlessly.

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Features of QB Sync Made Easy

Facilitate seamless integration of financial data, such as invoices, expenses, and customer information, between quickbooksss and Salesforce CRM.

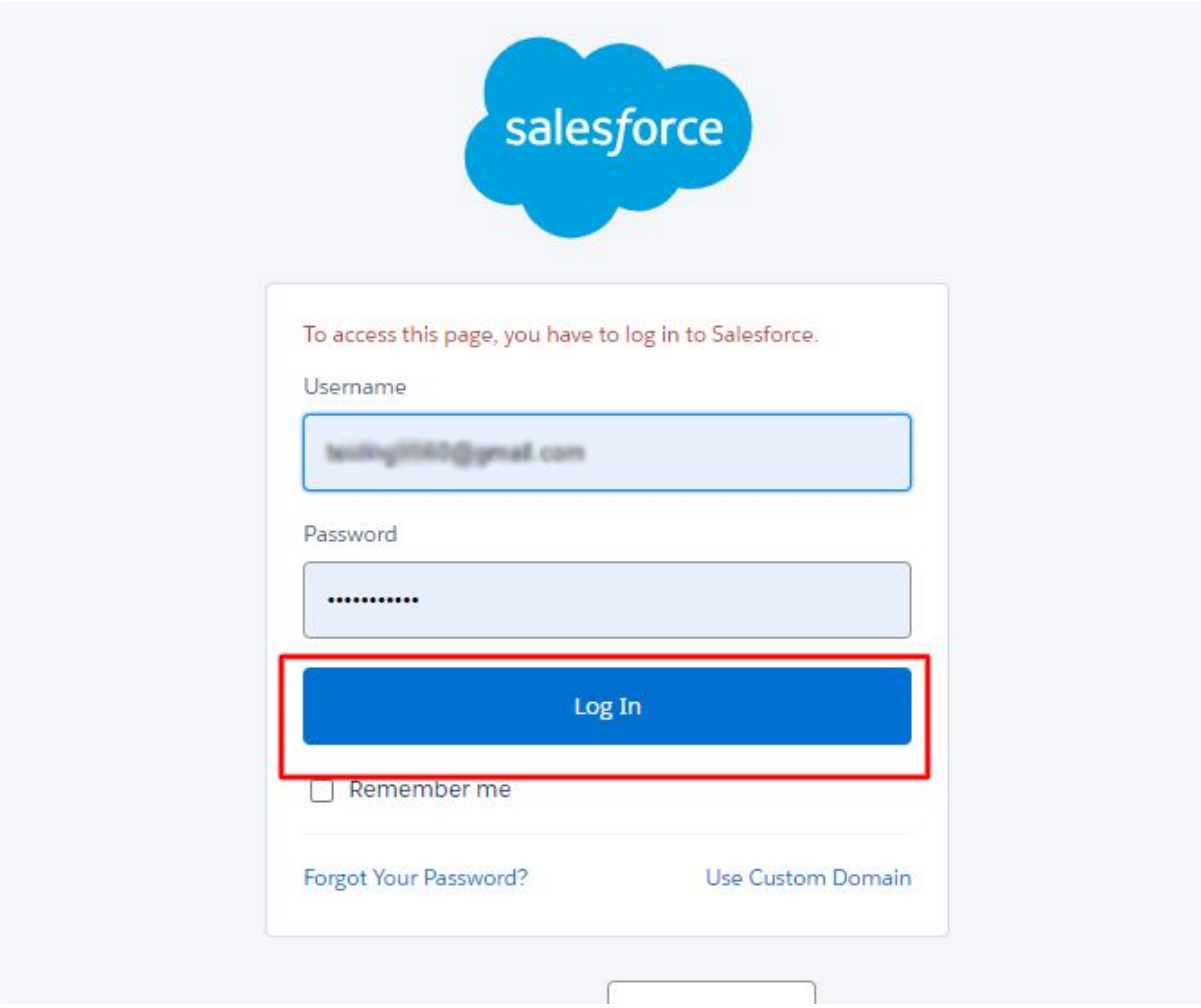
- **Real-time Sync:** Keep your quickbookss and other platforms up-to-date with synchronized data in real time.
- **Bi-Directional Sync:** Enable data flow between quickbooks and your systems in both directions, ensuring consistency.
- **Historical QB Data Sync in Salesforce:** Easily import historical quickbooks data into Salesforce for comprehensive financial insights.
- **Support for Multiple QB Environments:** Effortlessly manage integration with multiple quickbooks environments for enhanced flexibility.
- **Dynamic Mapping:** Map data fields dynamically, allowing you to tailor the integration to your specific business needs.

Prerequisites

- Need to Assign Permission Sets (we have shown it below).
- Not Supported in Group addition orgs.

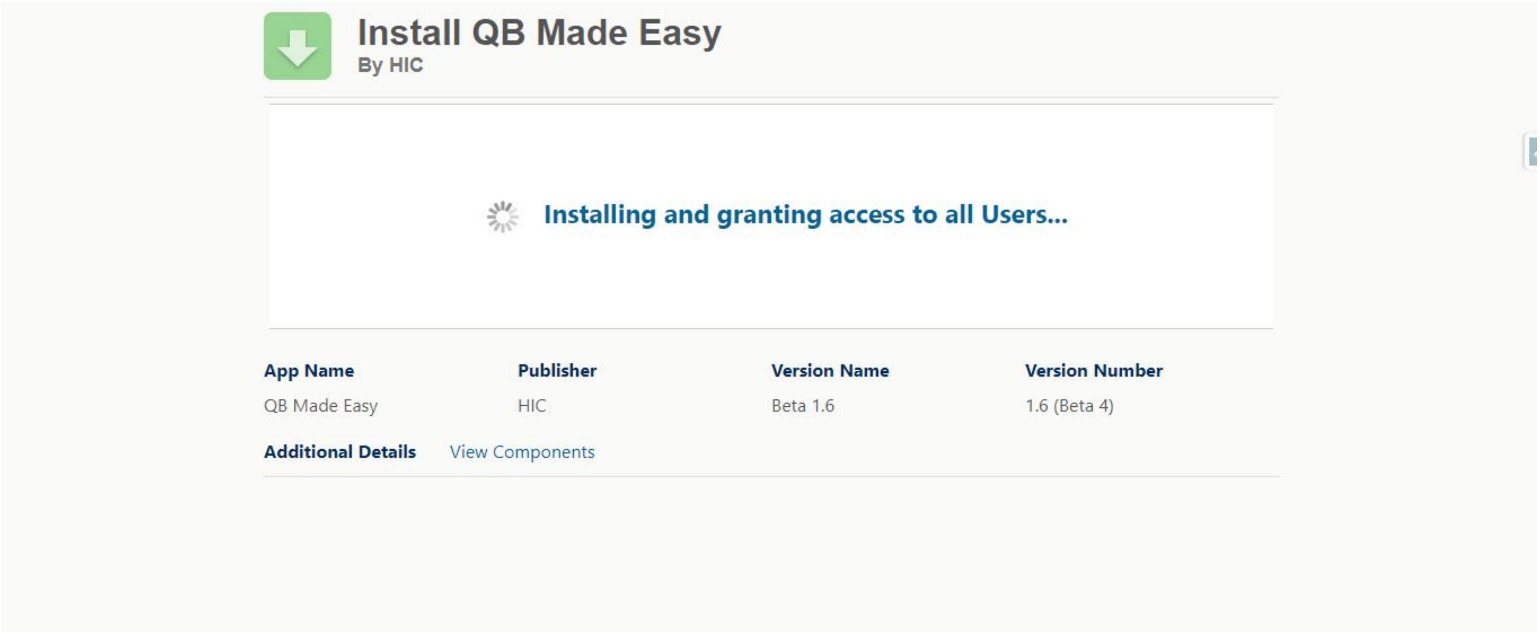
1. Installation and Permission

- Step 1: Login to Salesforce from your account.

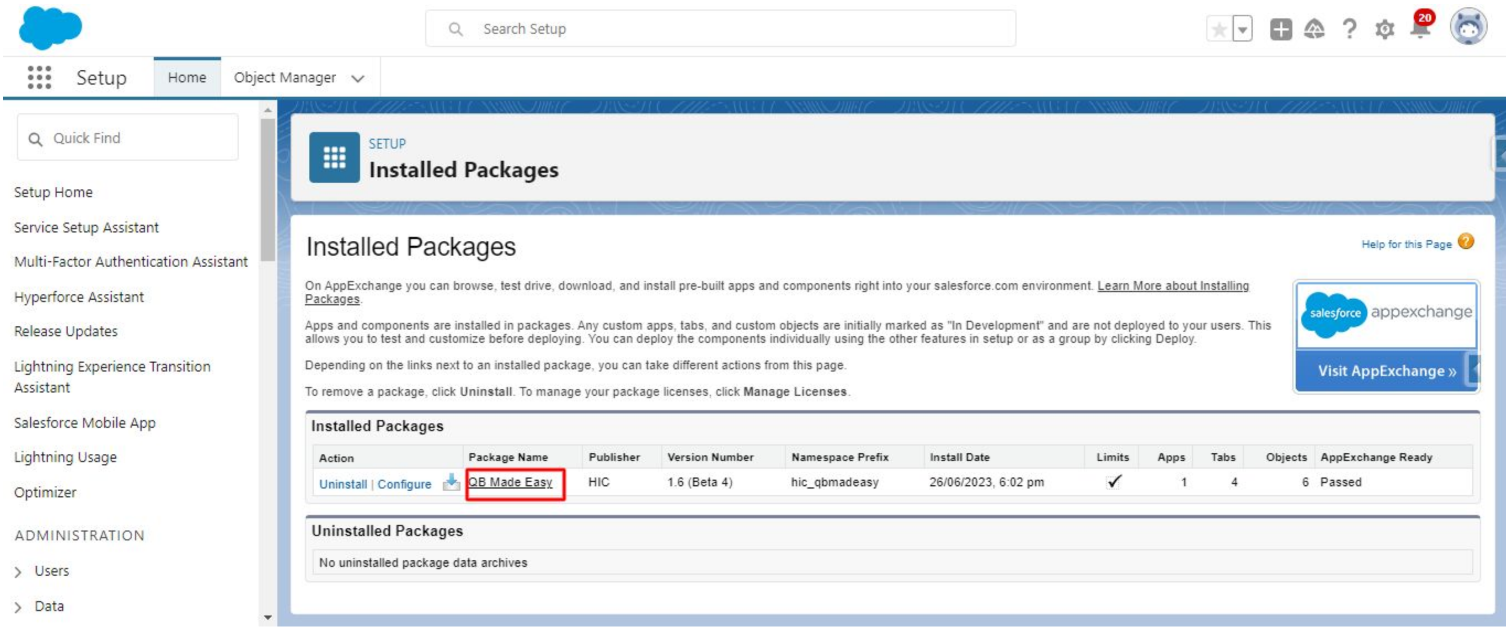


- **Step2:** After logging into Salesforce from your account, you will see the installation screen, Something like this. Here, click on **Install for All Users.**

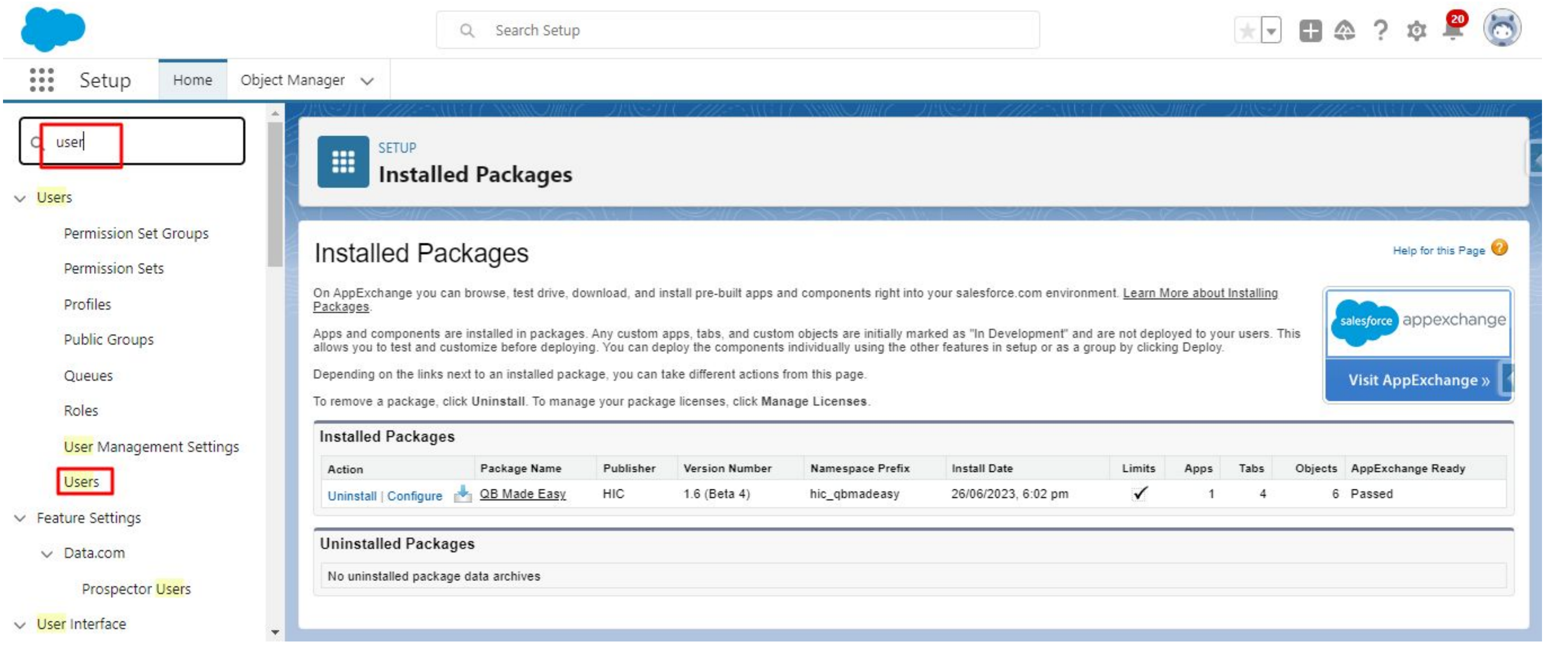
- You will now see that the QB Sync Made Easy app is Installed for All Users.



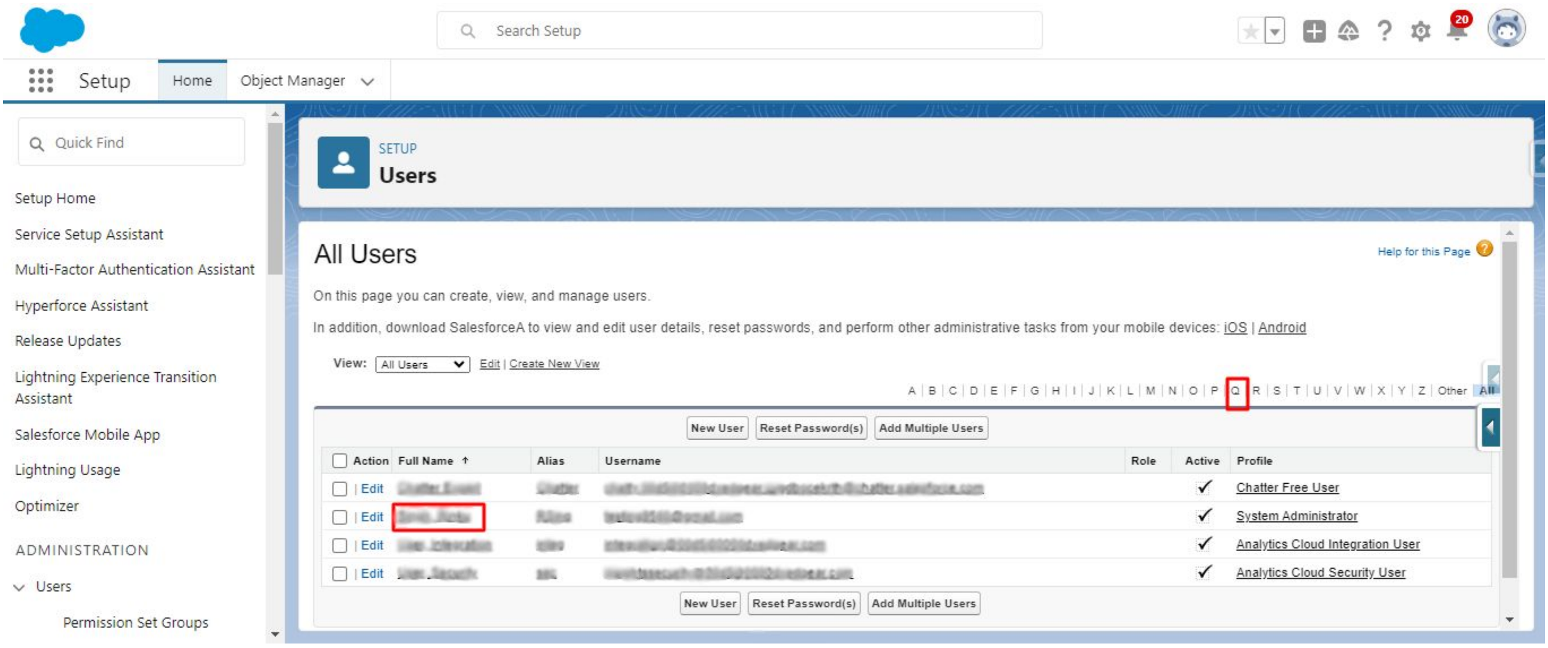
- **Step3:** Now the **QB Sync Made Easy app installed in salesforce.**



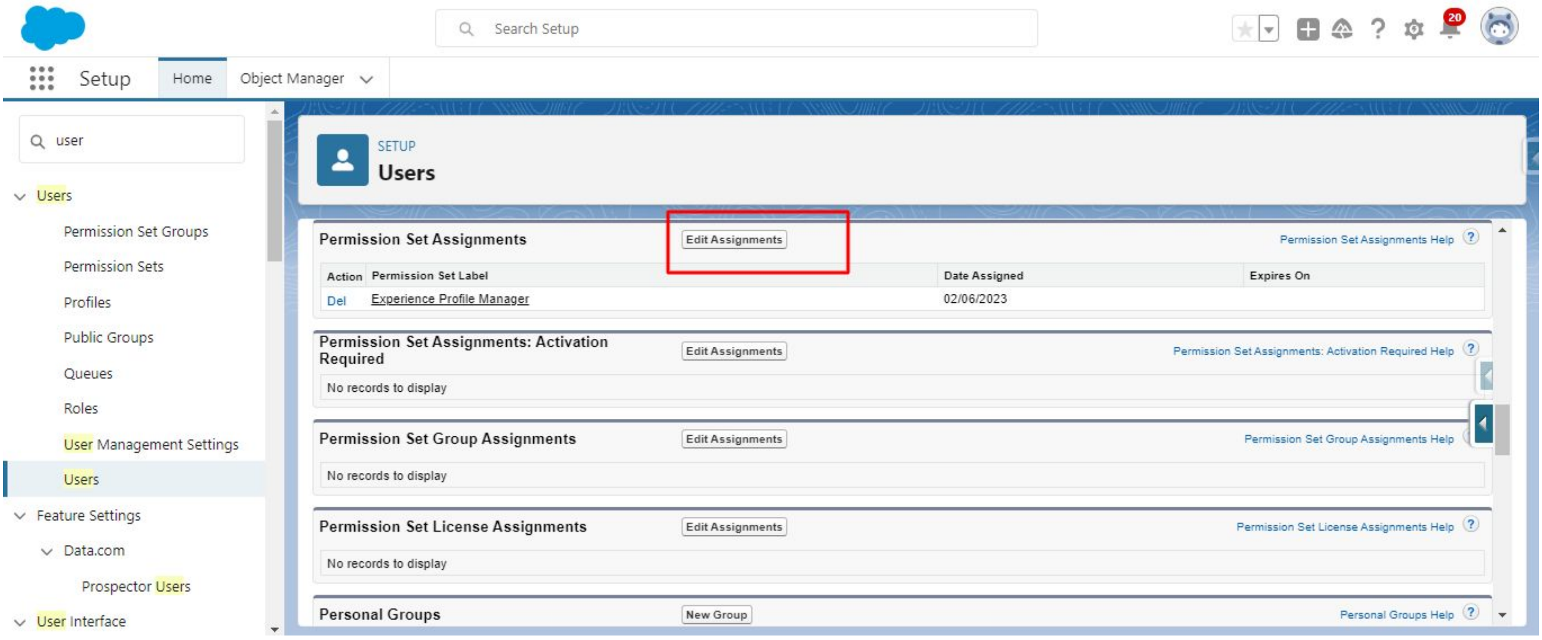
- **Step4:** After installing the **QB Sync Made Easy** app, the **Home'** page will appear as shown and search the **Users.**

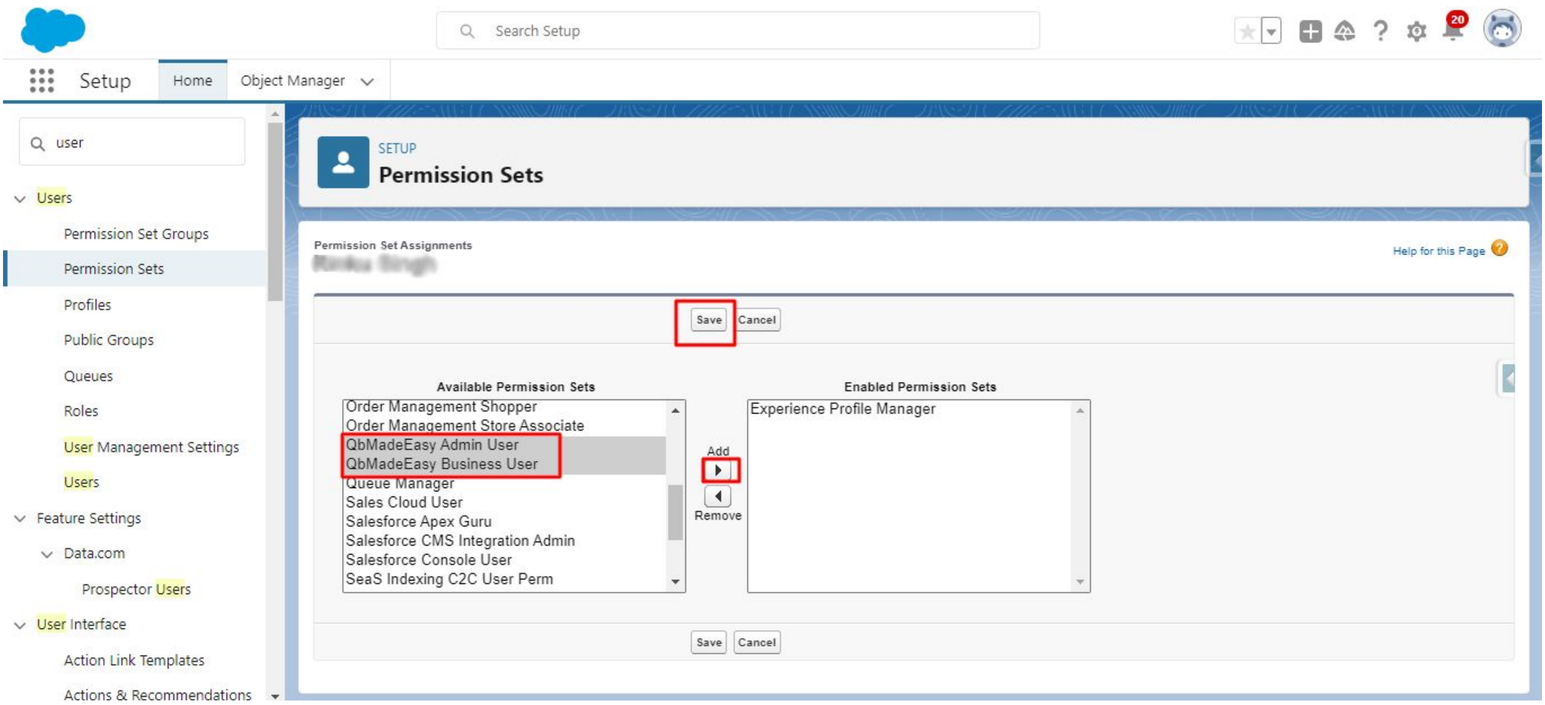


- **Step5:** Go to **Users** and Check the **Permission set.**

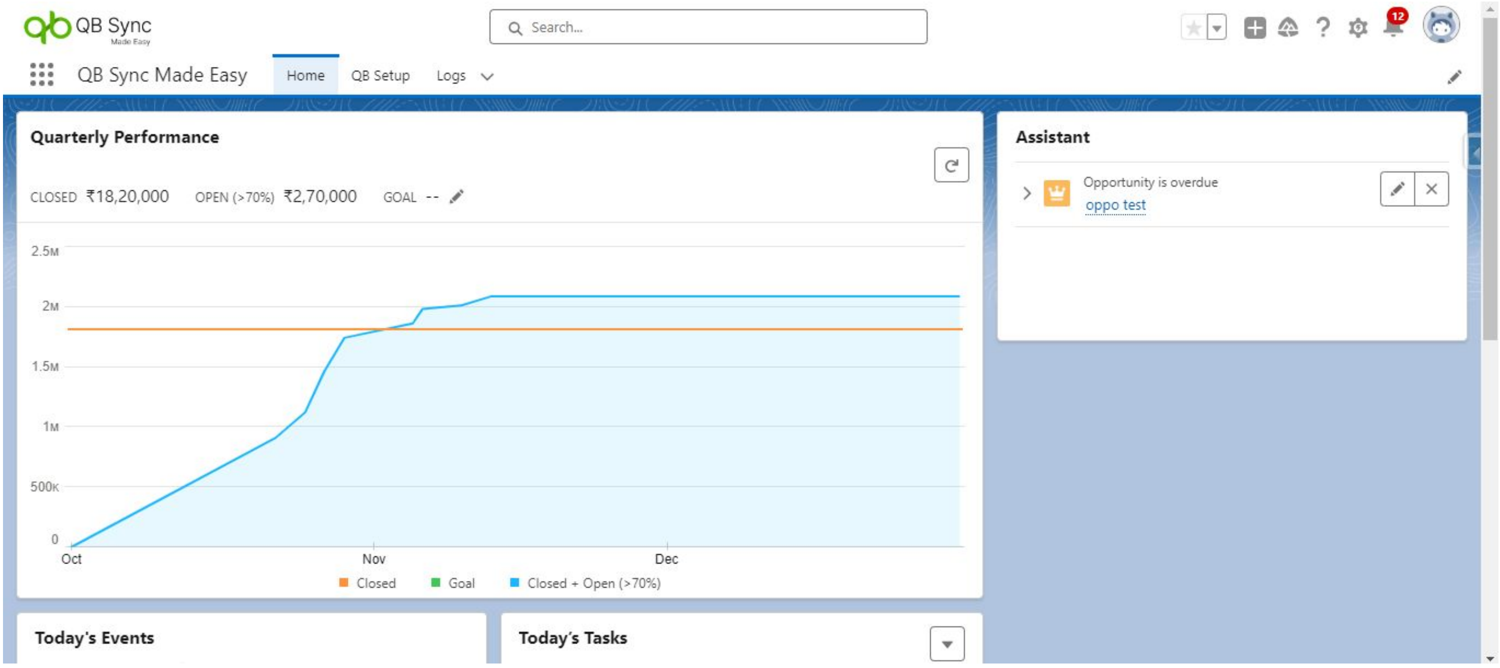


- **Step6:** Then Assign the **Permission Sets** (QB made easy admin user & business user).



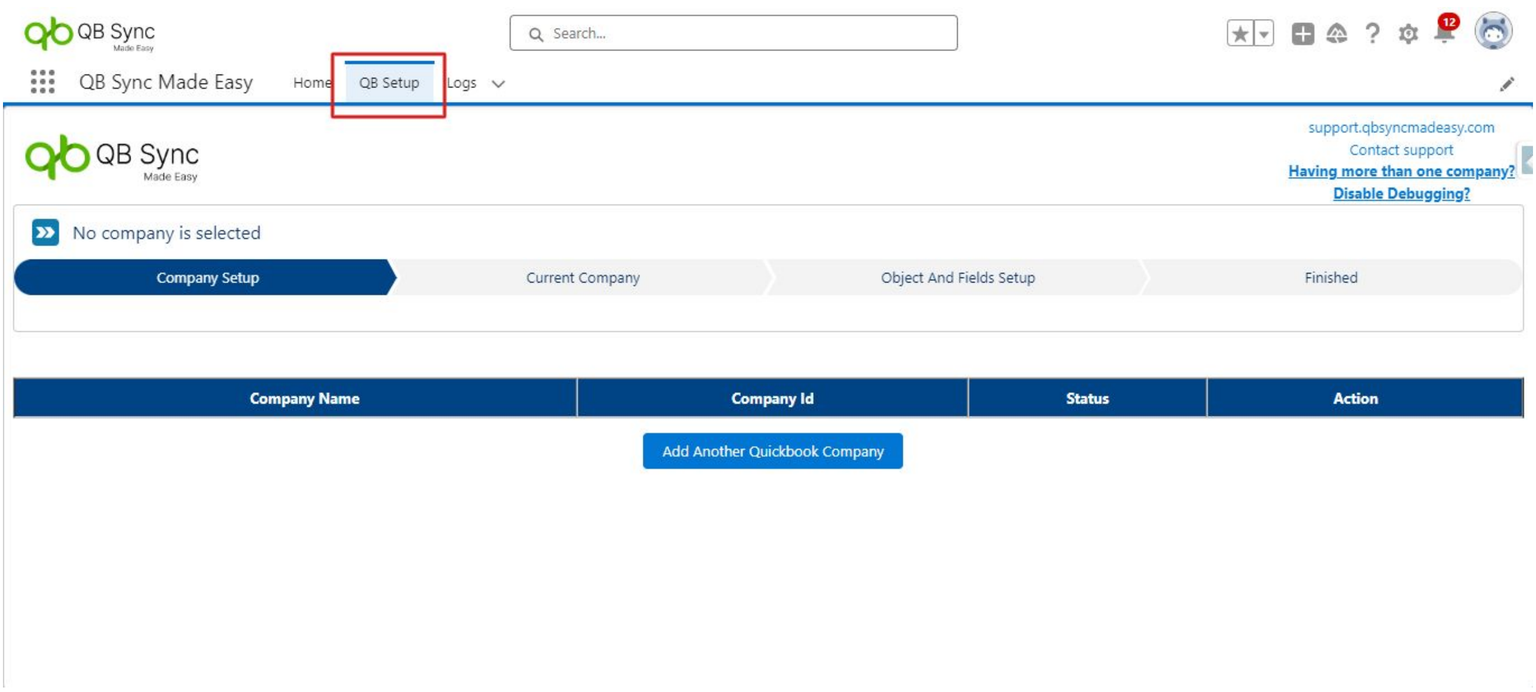


- **Step7:** After installing the **QB Sync Made Easy** app, you should be on the Homepage of the app. And click on the Qb Setup.

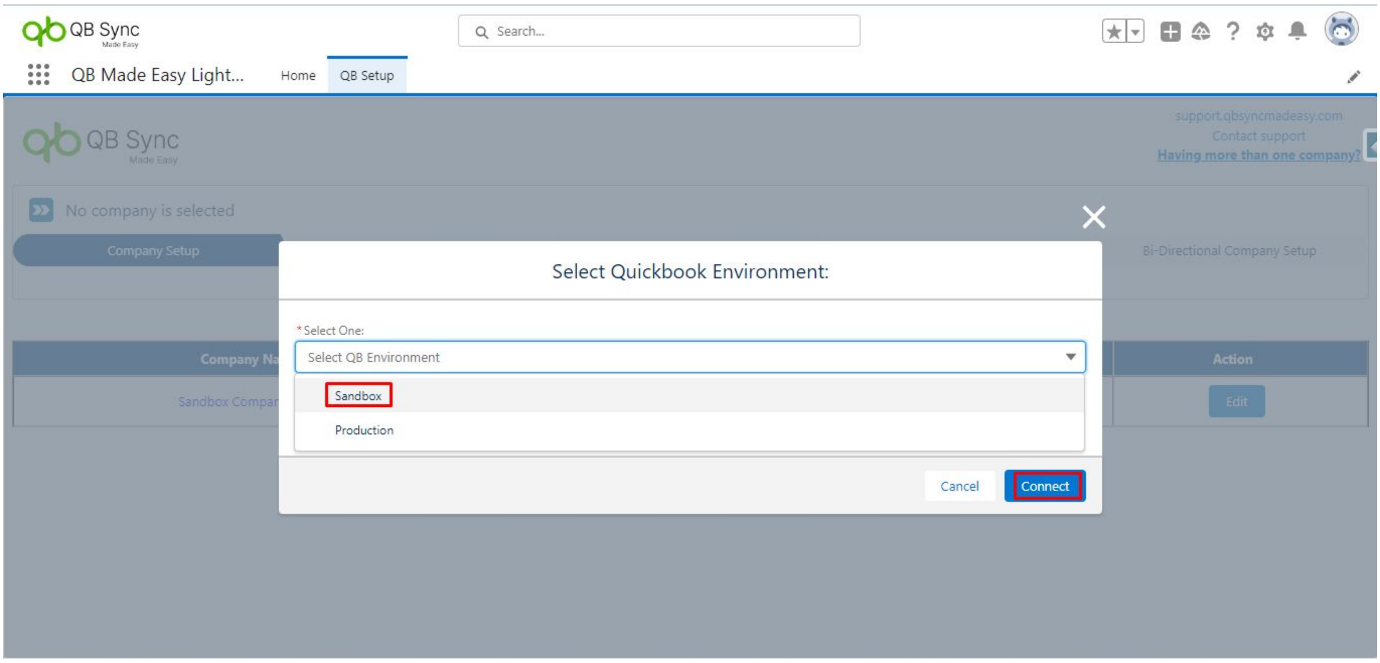


- **1.1. Connect quickbooks Companies in Salesforce**

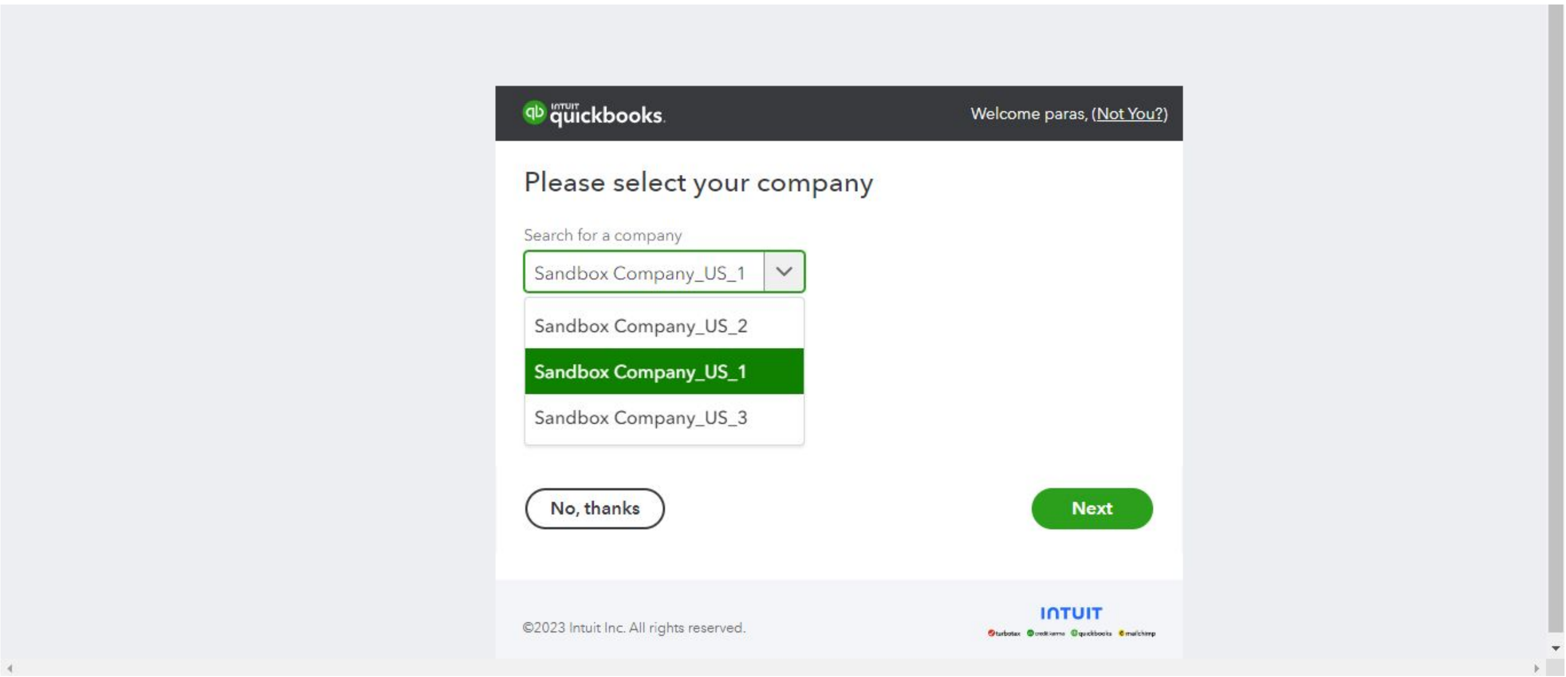
- **Step8:** After clicking on the **QB Set up** page click on the **Connect with quickbooks online.**



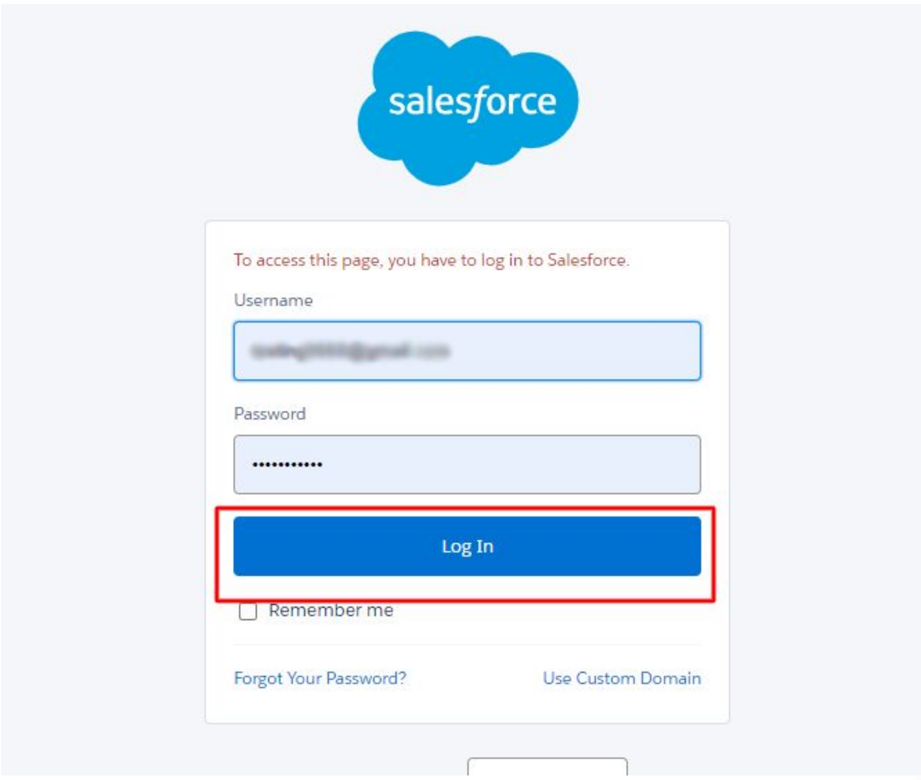
- **Step 9:** We have to click on the Connect with quickbooks online, then Choose the quickbooks Environment (Sandbox/Production) then click the Connect button.



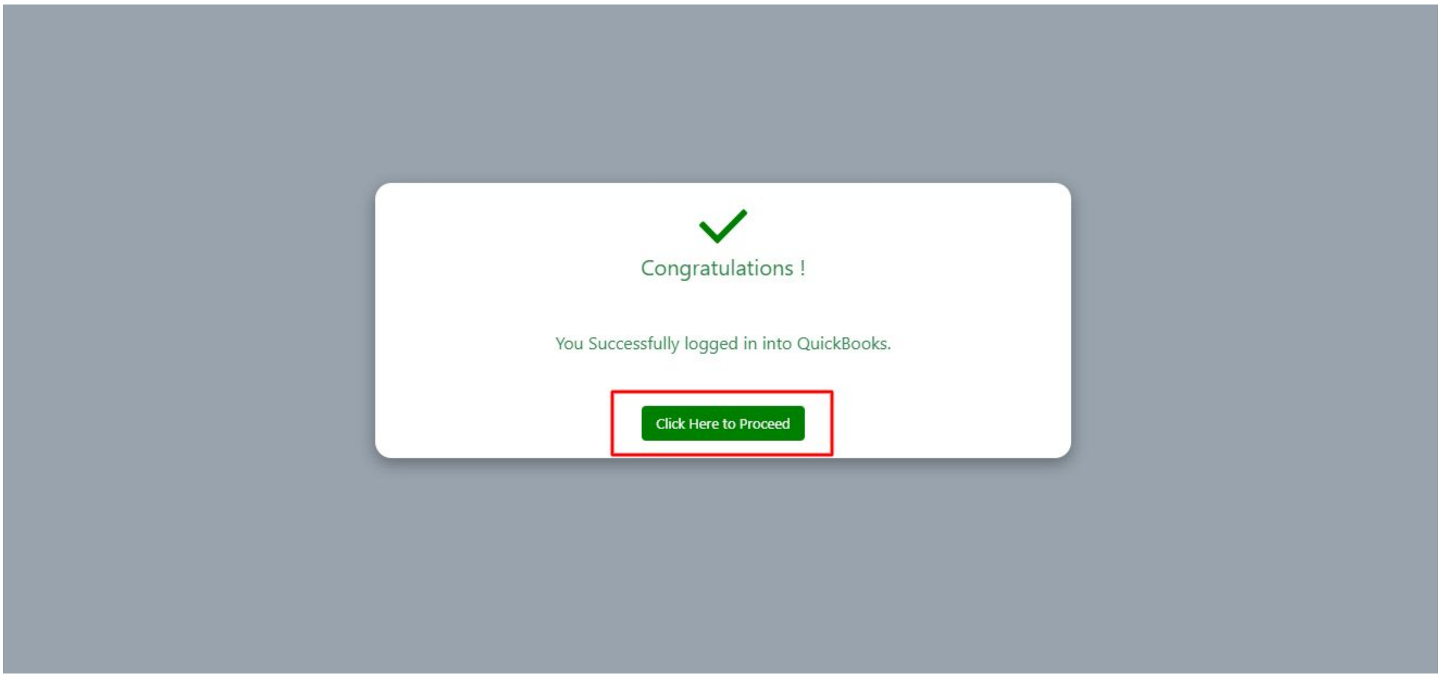
Step 10: After that select the Company and then click on the next tab.



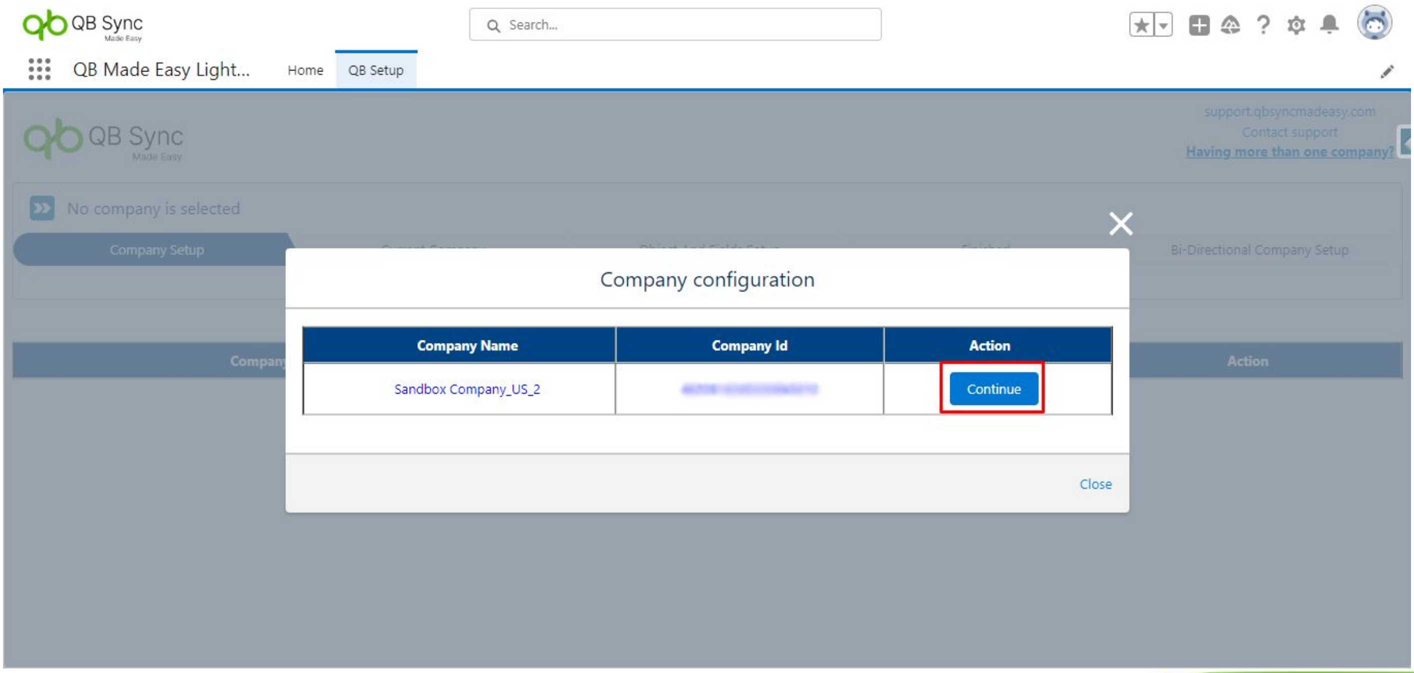
Step 11: Then login to the same **Salesforce Account** that you want to connect to.



- **Step12:** You have to log in to the Salesforce Account then you will see the Message that the company has successfully connected. Then you click on the click here to Proceed Button.

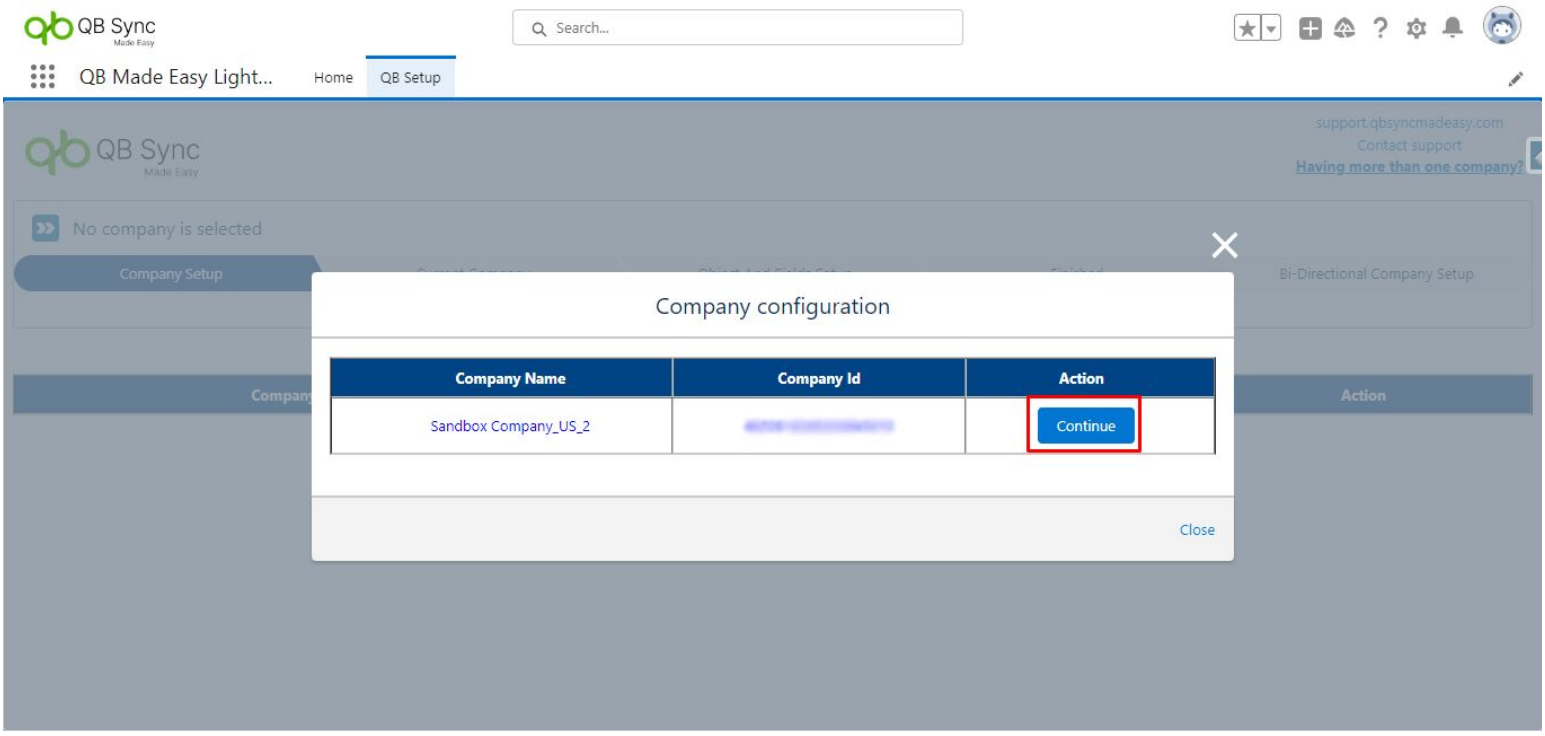


- **Step 13:** After that you will see that your company has been connected.

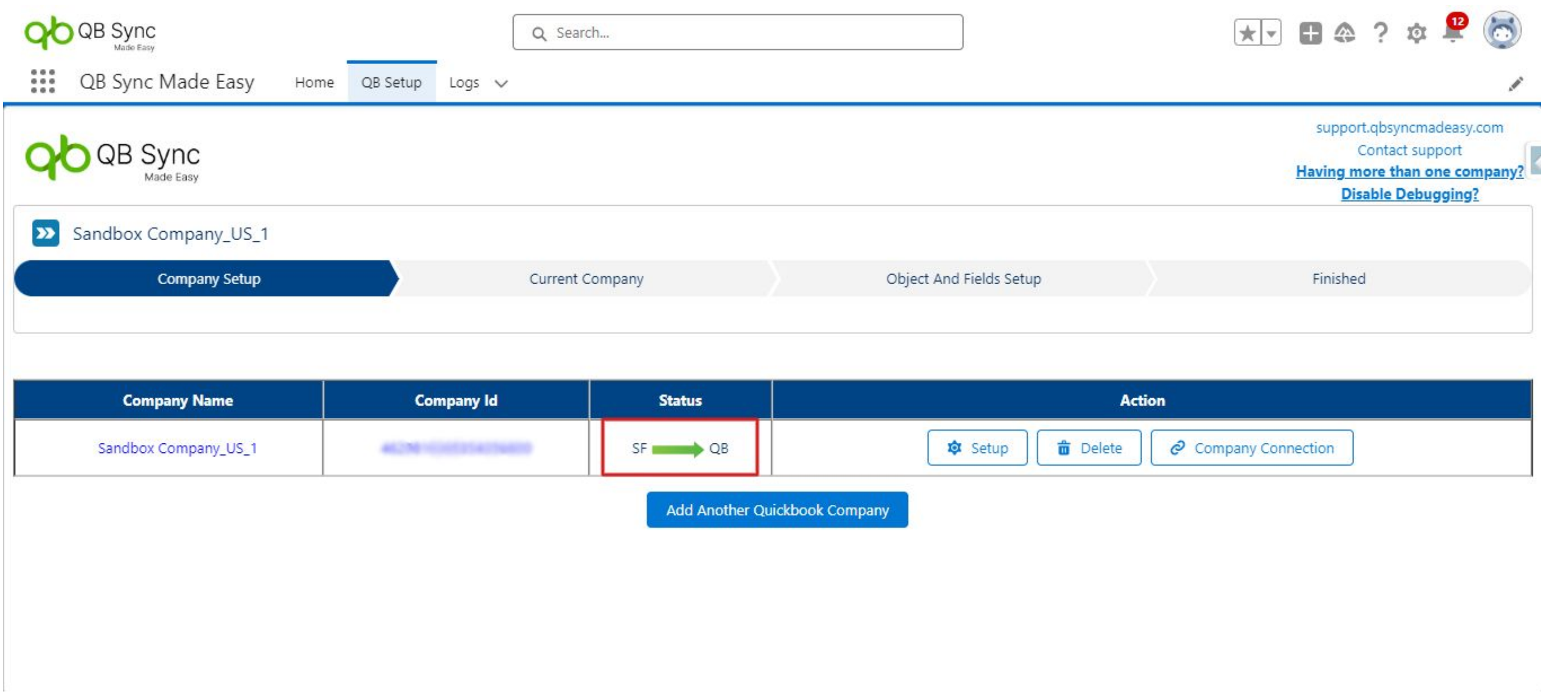


- **Here, We have finally connected with the quickbooks company.**

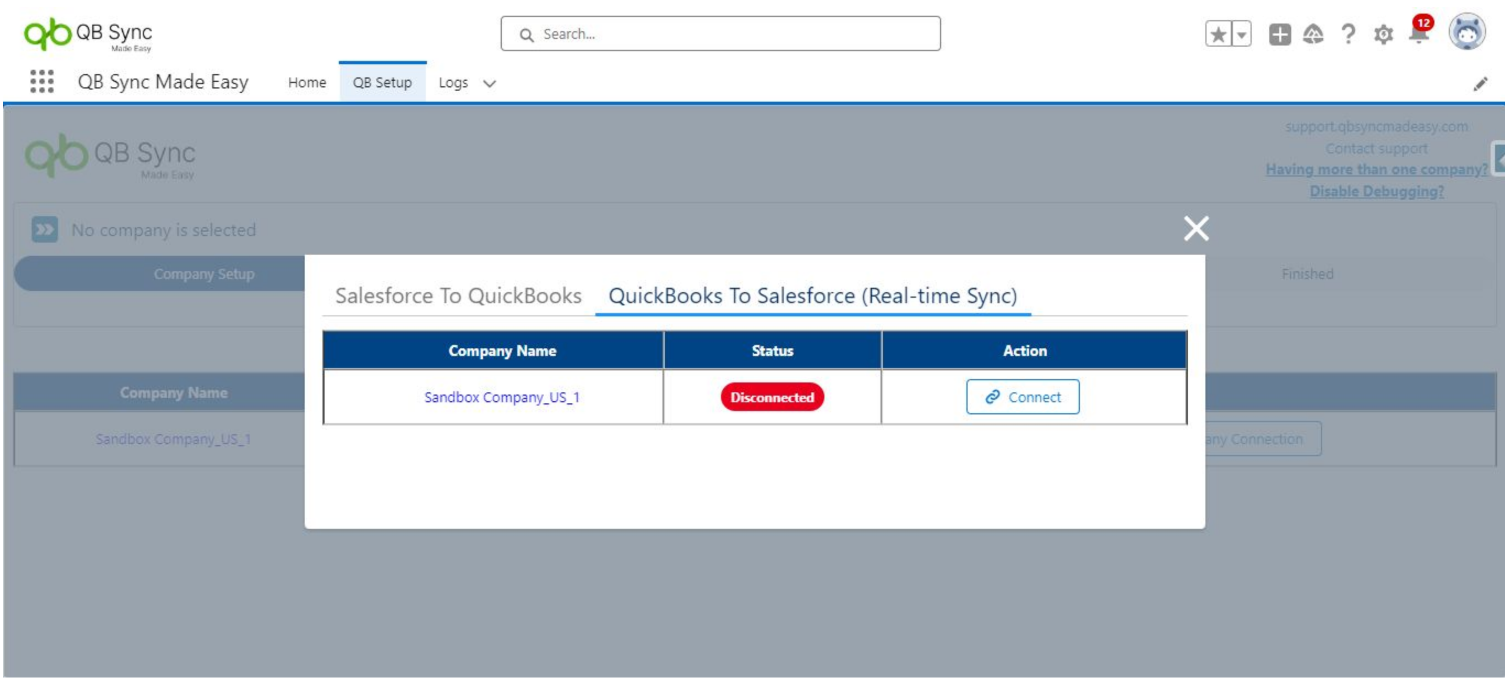
- **Step 14:** Then You click on the **Continue** button &Then You can click on the cross button & close button.

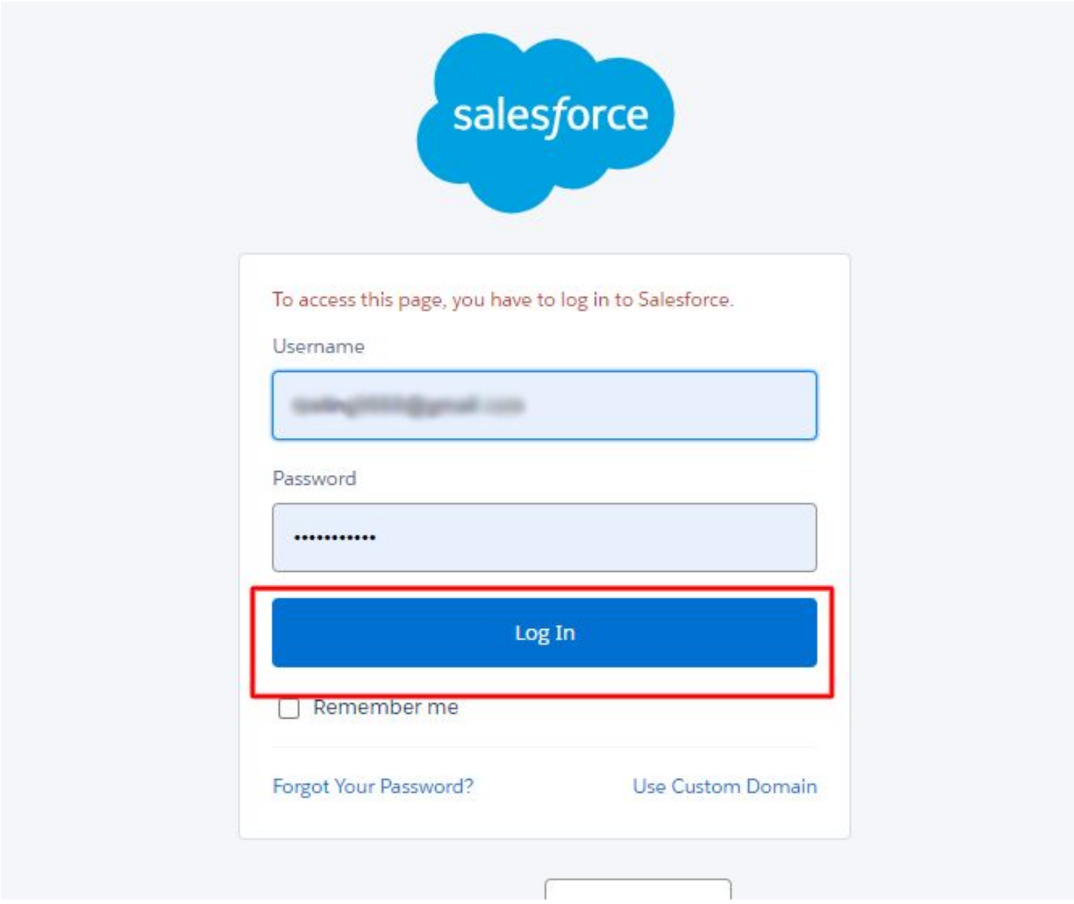


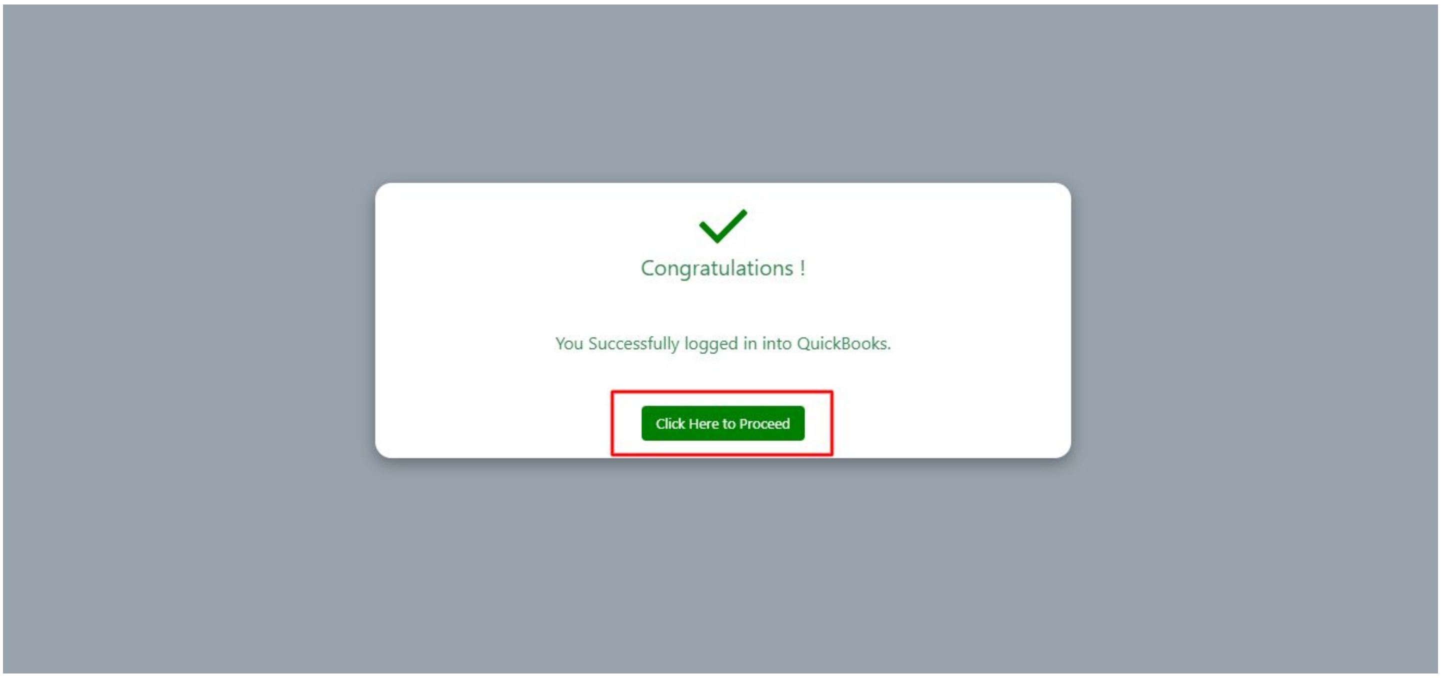
Now you can show the Salesforce to quickbooks company has been connected.



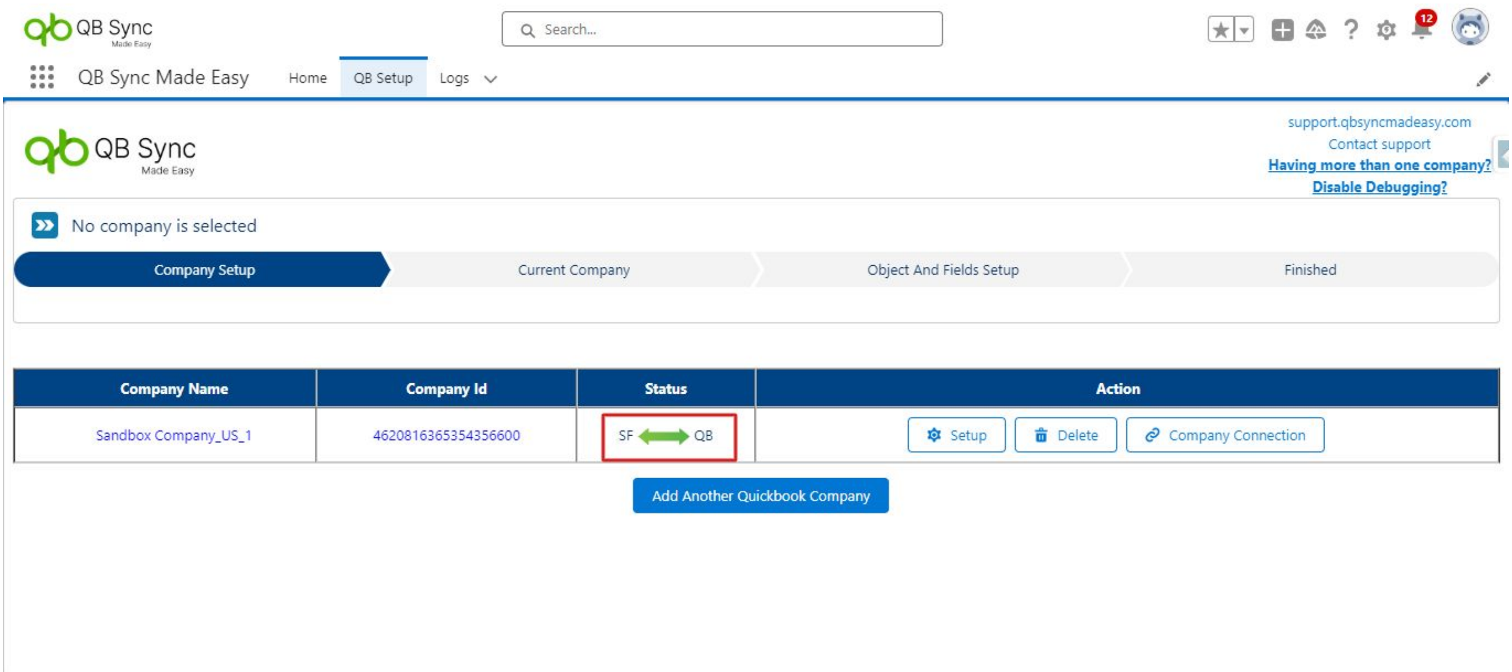
Then You can click on company connection and Click on the quickbooks to salesforce(RealTime sync) and click on the connect button the quickbookss to Salesforce is connected.




salesforce
To access this page, you have to log in to Salesforce.
Username
Password
Log In
Remember me
Forgot Your Password?
Use Custom Domain

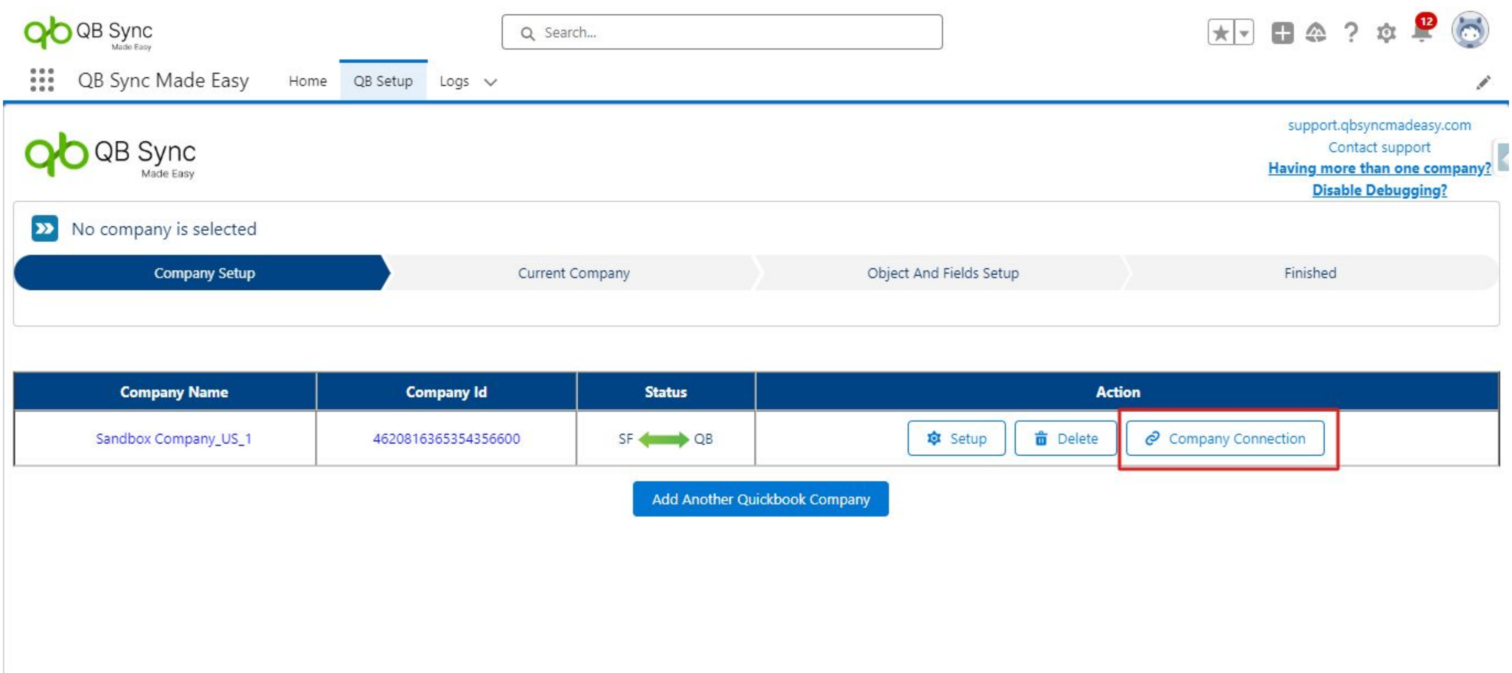

Congratulations !
You Successfully logged in into QuickBooks.
Click Here to Proceed

Now you can see the Salesforce to quickbooks & quickbooks To Salesforce company are connected.

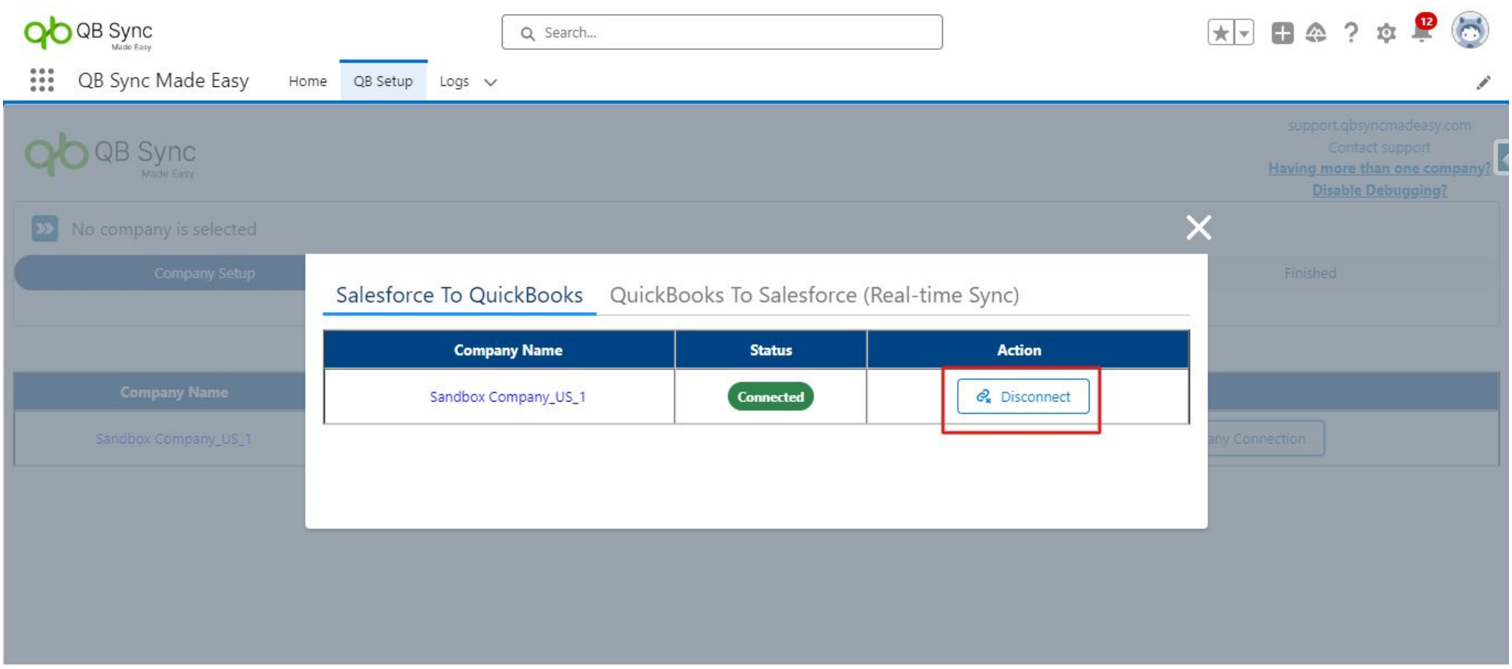


The app provides you with the option to disconnect as well. You can disconnect Salesforce to quickbooks & quickbooks to Salesforce company.

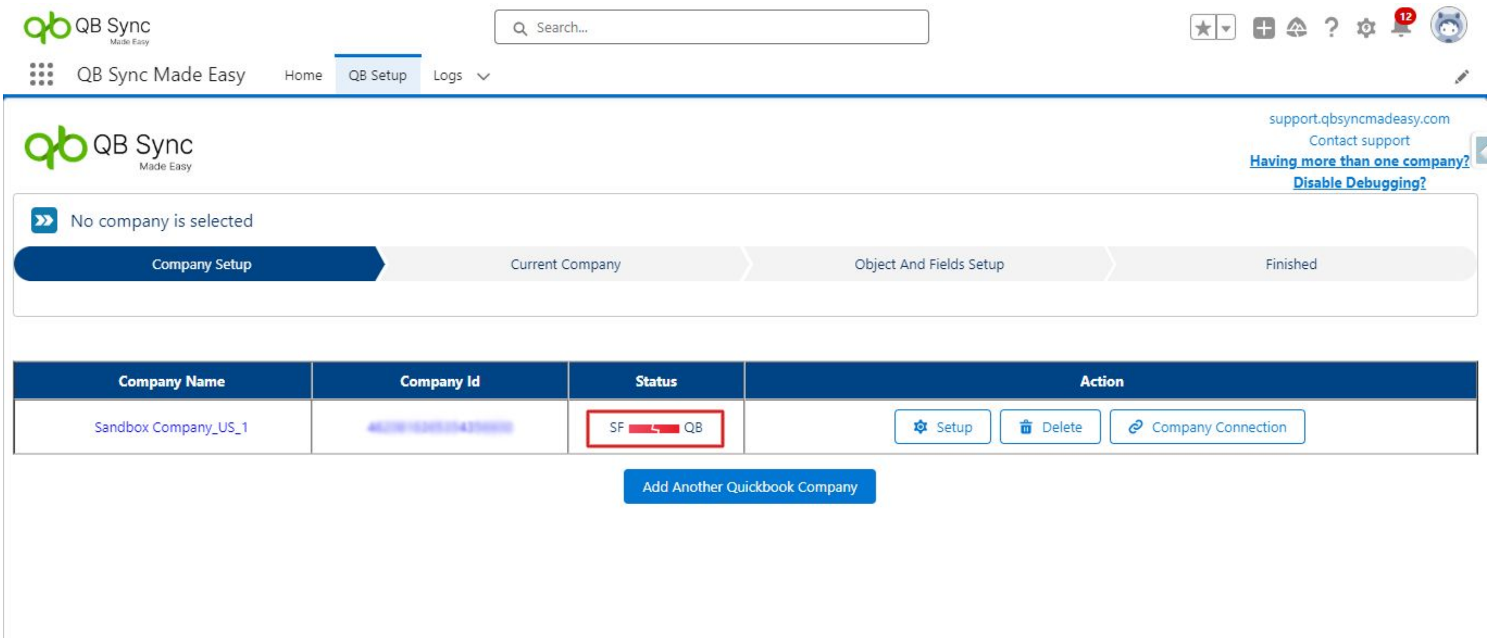
First Click on the Company connections



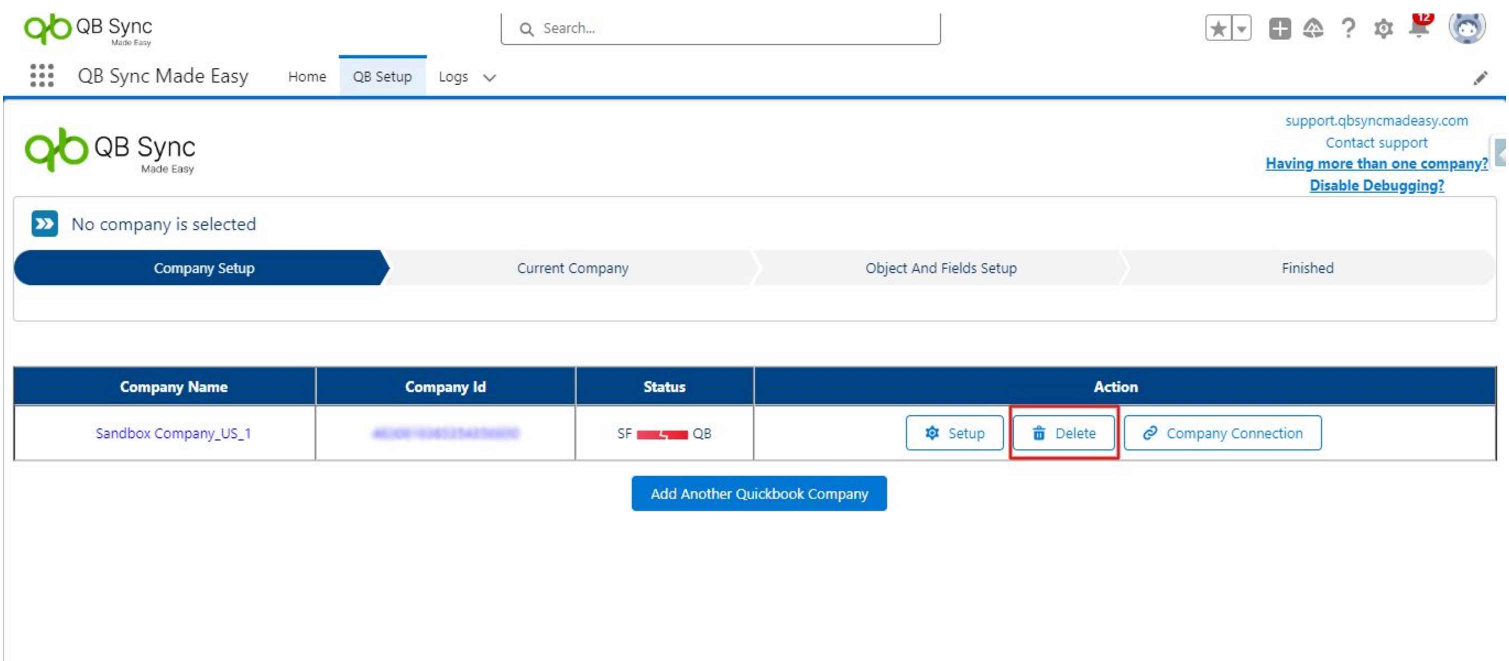
Here You can see the Salesforce to quickbooks & quickbooks to the Salesforce company , click on the disconnect button and the companies will be disconnected.



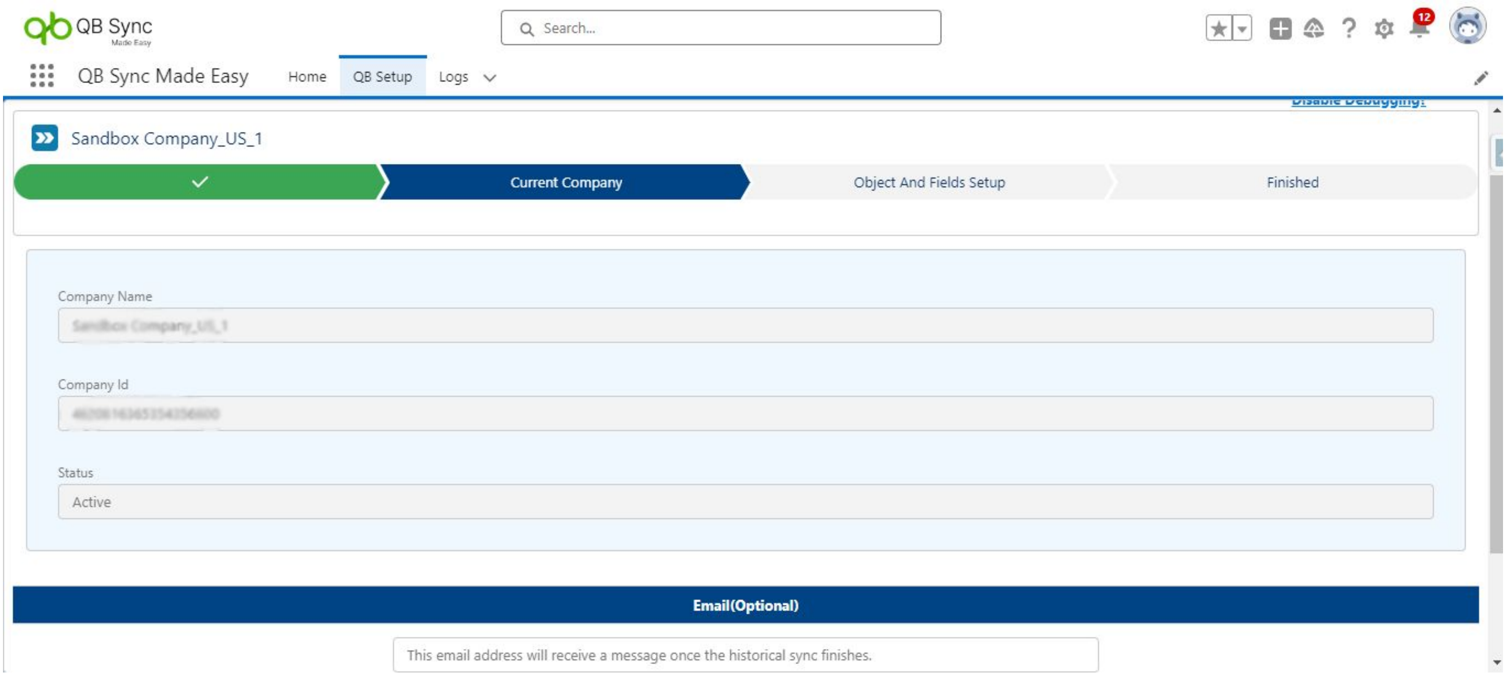
Then you can see the company is disconnected.



Now you can see another option: Delete you can click on the delete button the Company is deleted.

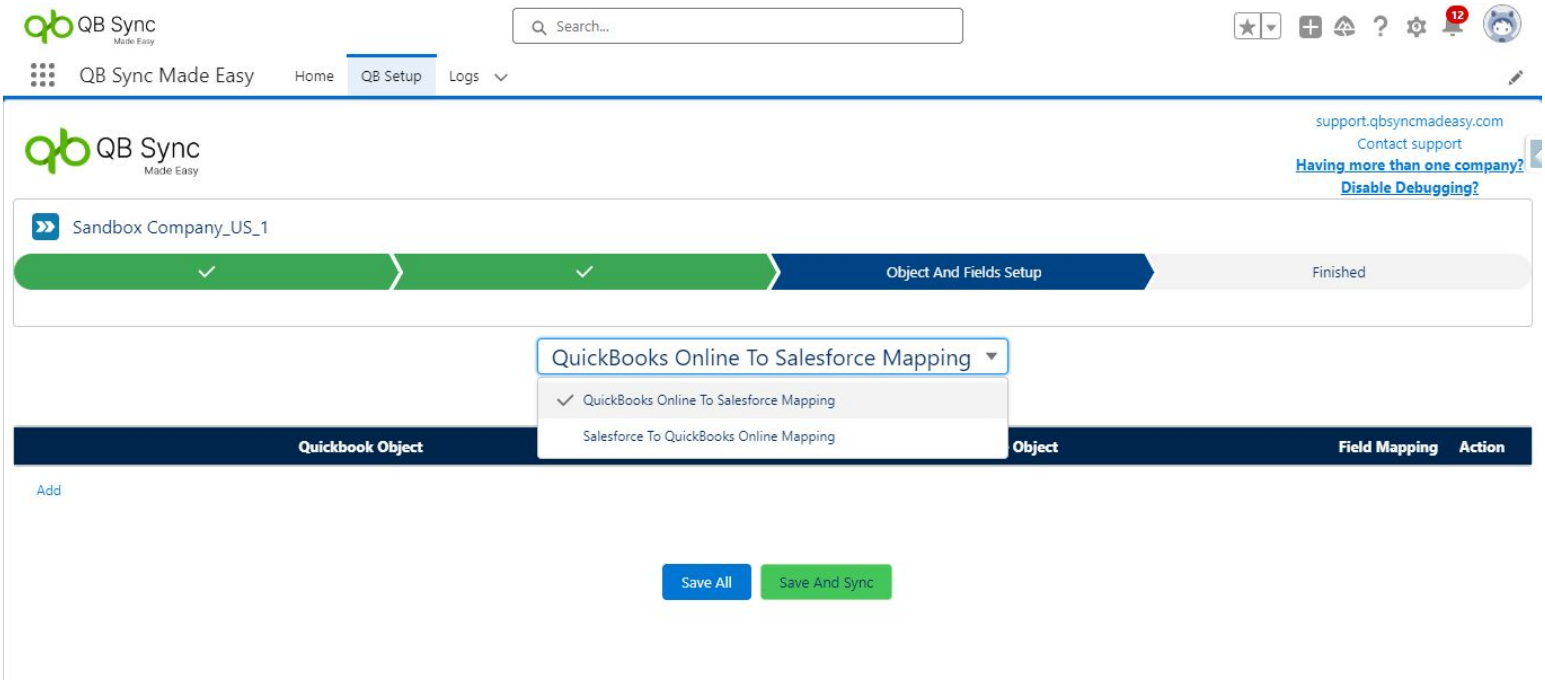


Step 15: After you click on the continue button you can see the company details. And in the **email** section, you can enter Email if you want to be notified after the **Historical sync** has been Completed.



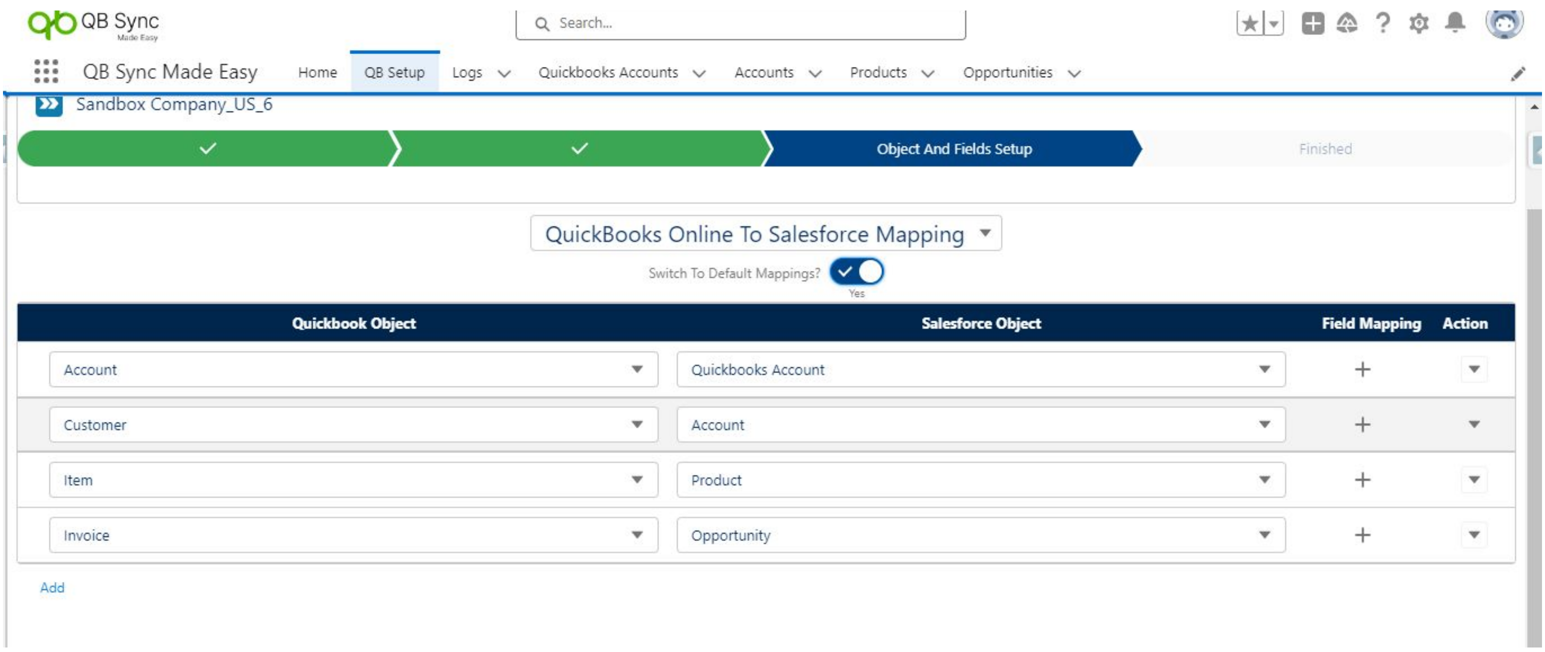
- ## 1.3. How to Configure Mapping For Salesforce to quickbooks & quickbooks to Salesforce.

- **Step 16:** Here you can see the mapping page where we will do Mapping for **quickbooks to Salesforce & salesforce to quickbooks Sync.**



2. quickbooks to Salesforce ‘Historical Sync’.

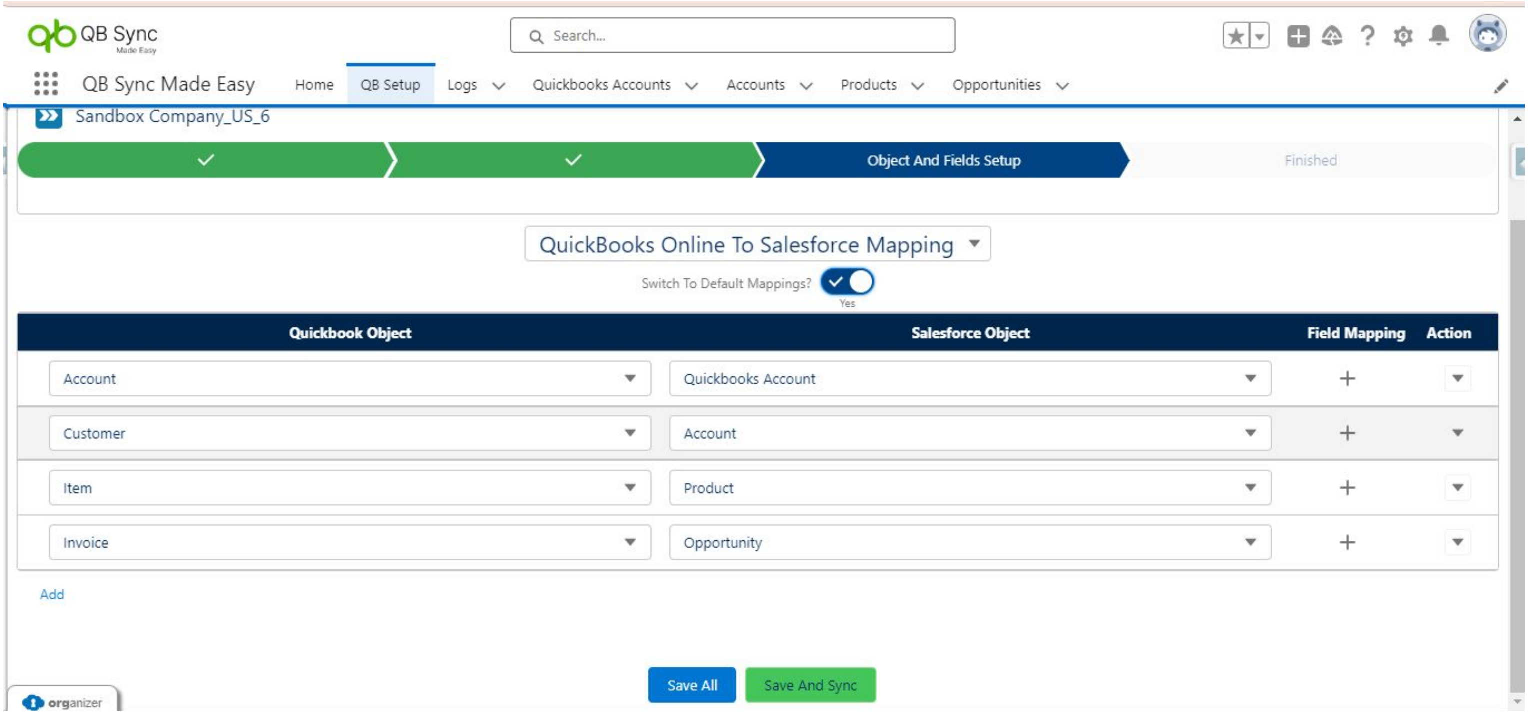
- **Step 17:** For this, we have to choose the quickbooks to Salesforce in the combo box. After that we have to choose the objects that we want to sync then we choose the fields of those objects.



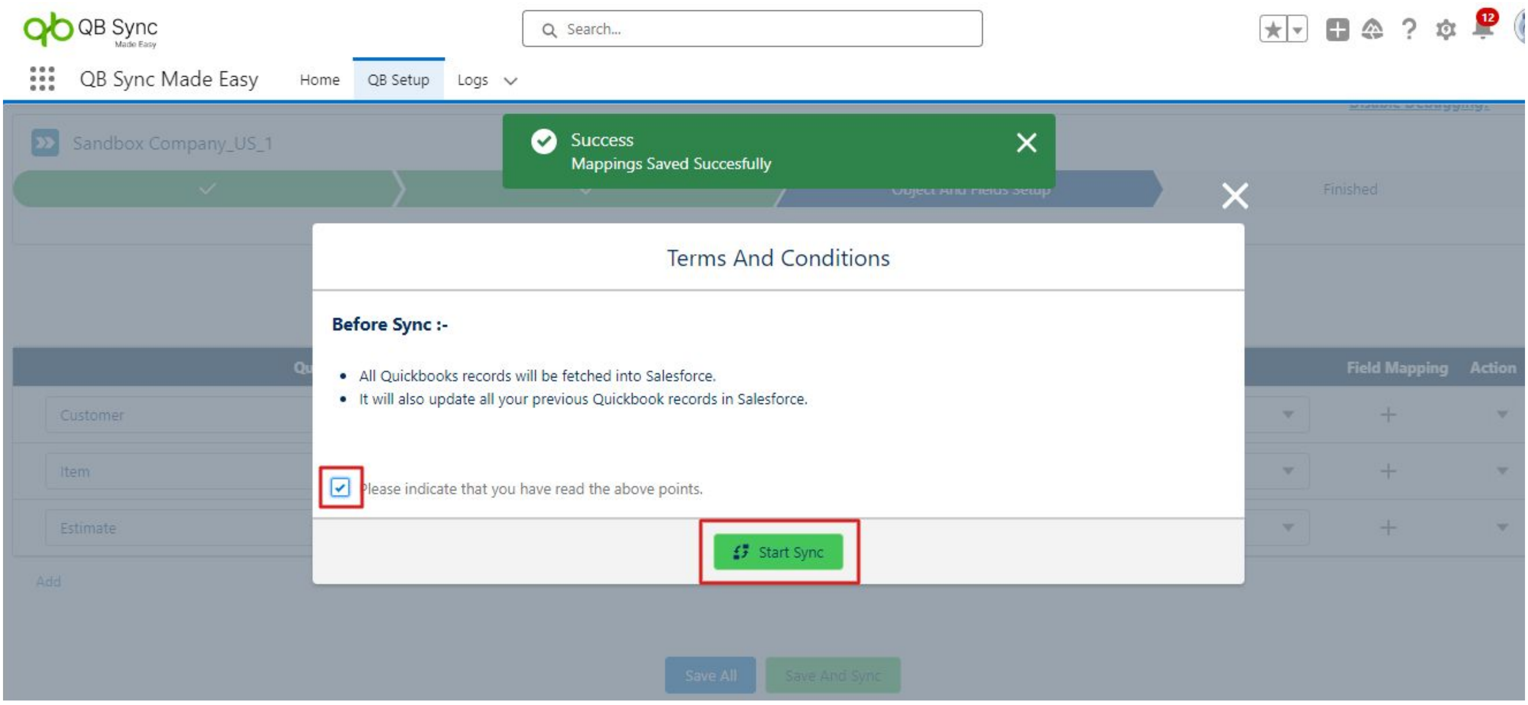
- **Step 18:** We can also load the **Default mappings** For (Customer, Item, Invoice and Account) with Salesforce's **Account,Product2,Opportunity and quickbooks Account(custom object in Salesforce)** respectively.

- After you have added the Mapping Click on the SaveAll(If you just want to save the mapping) or Save and Sync Button(If you want to save and Start the Sync Process).

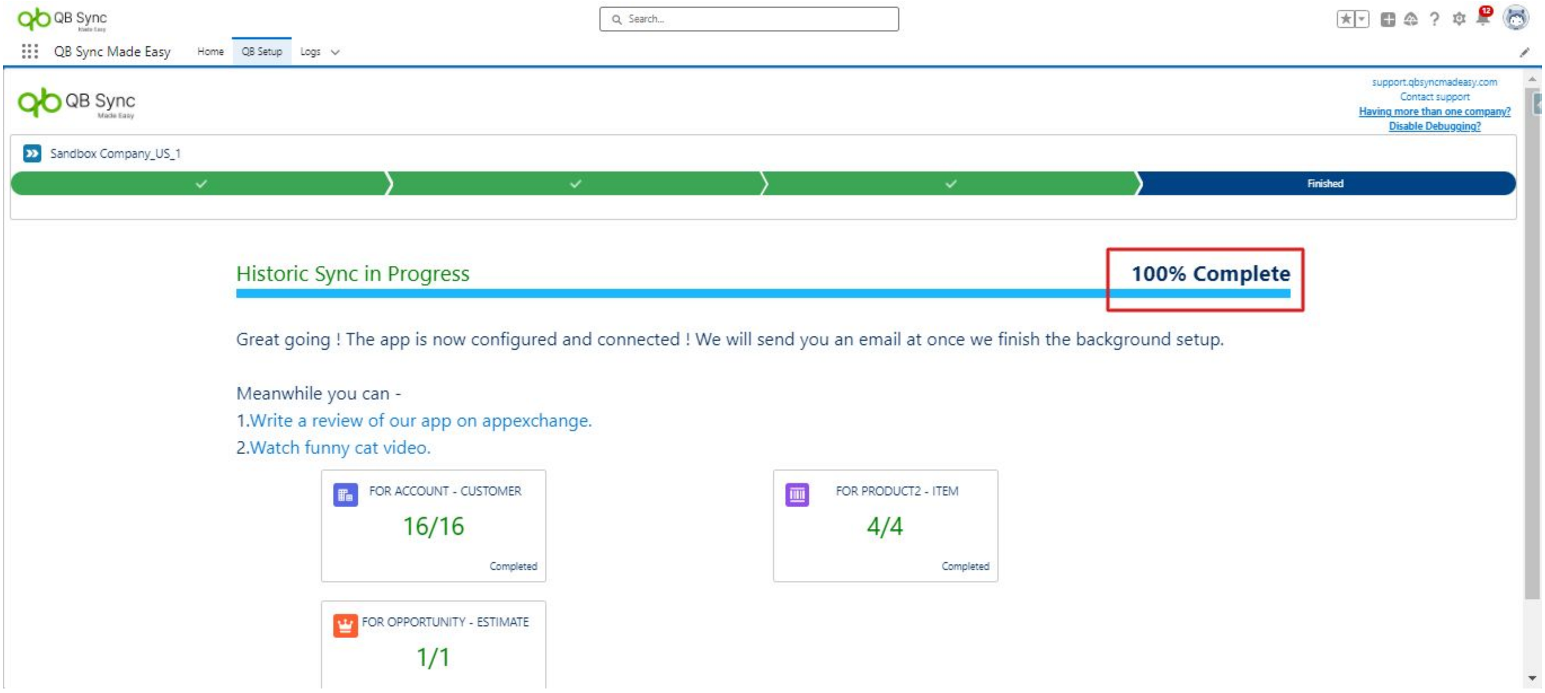
Note: So during historical sync order of mapping is important.Before clicking "save and sync button" we can drag and drop the mapping row in the order in which we want sync to start.So for eg if we have mapped for account-customer and opportunity-invoice then we need to make sure that mapping of account-customer is above the opportunity-invoice as account id would be required to create opportunity.



- **Step 19:** After that click on the **save and sync** button then a Modal will Popup then you can Sync.

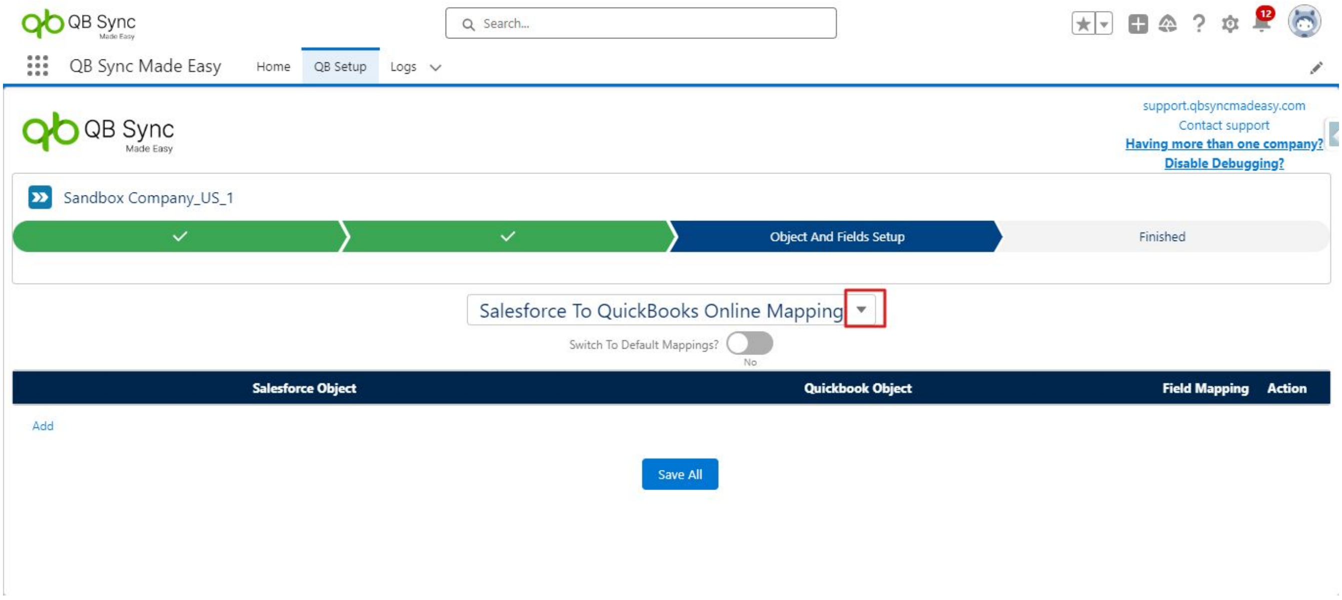


- **Step20:** Here you can see the status of Sync.

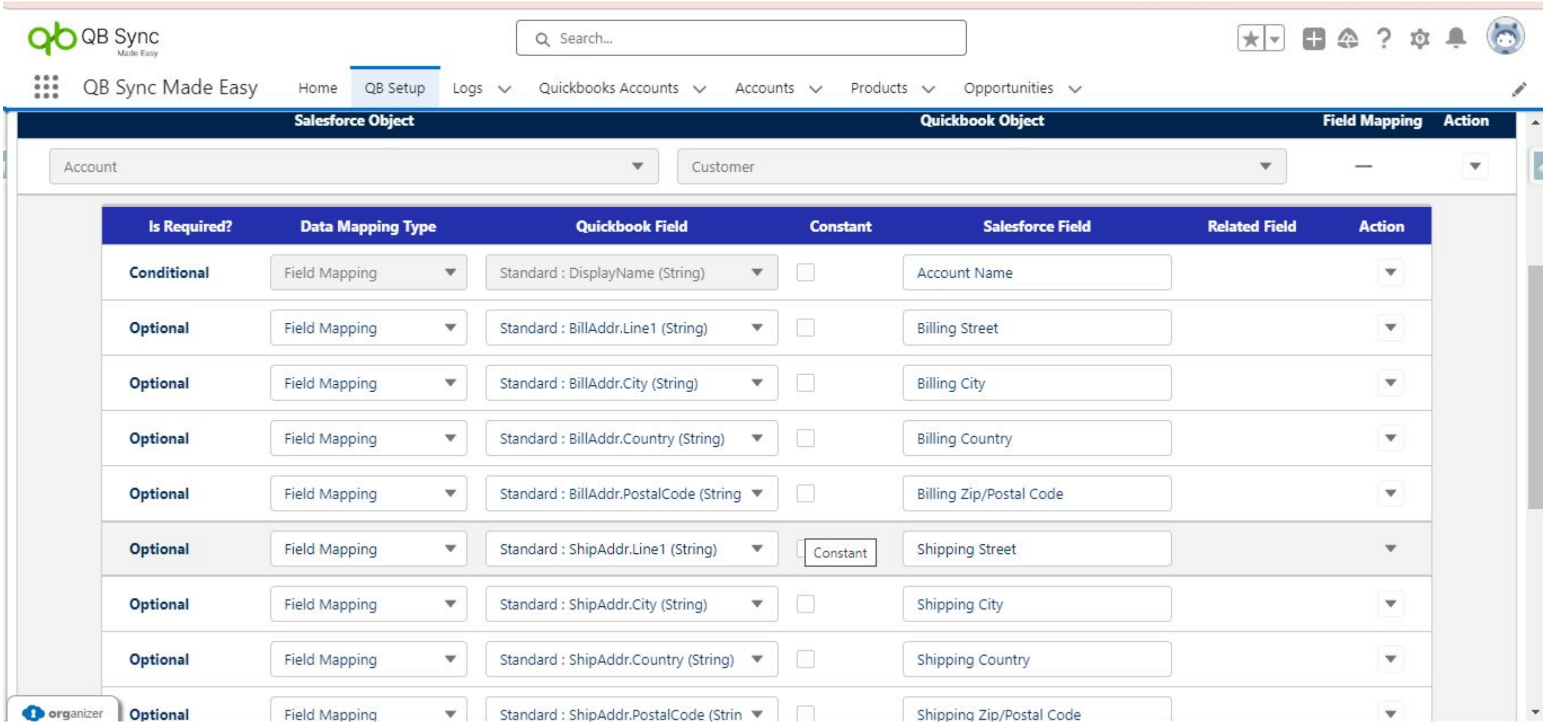


- **2.1 Salesforce to quickbooks**

- **Step21:** For Salesforce to quickbooks Mapping Go to the Object And Field Setup Page.



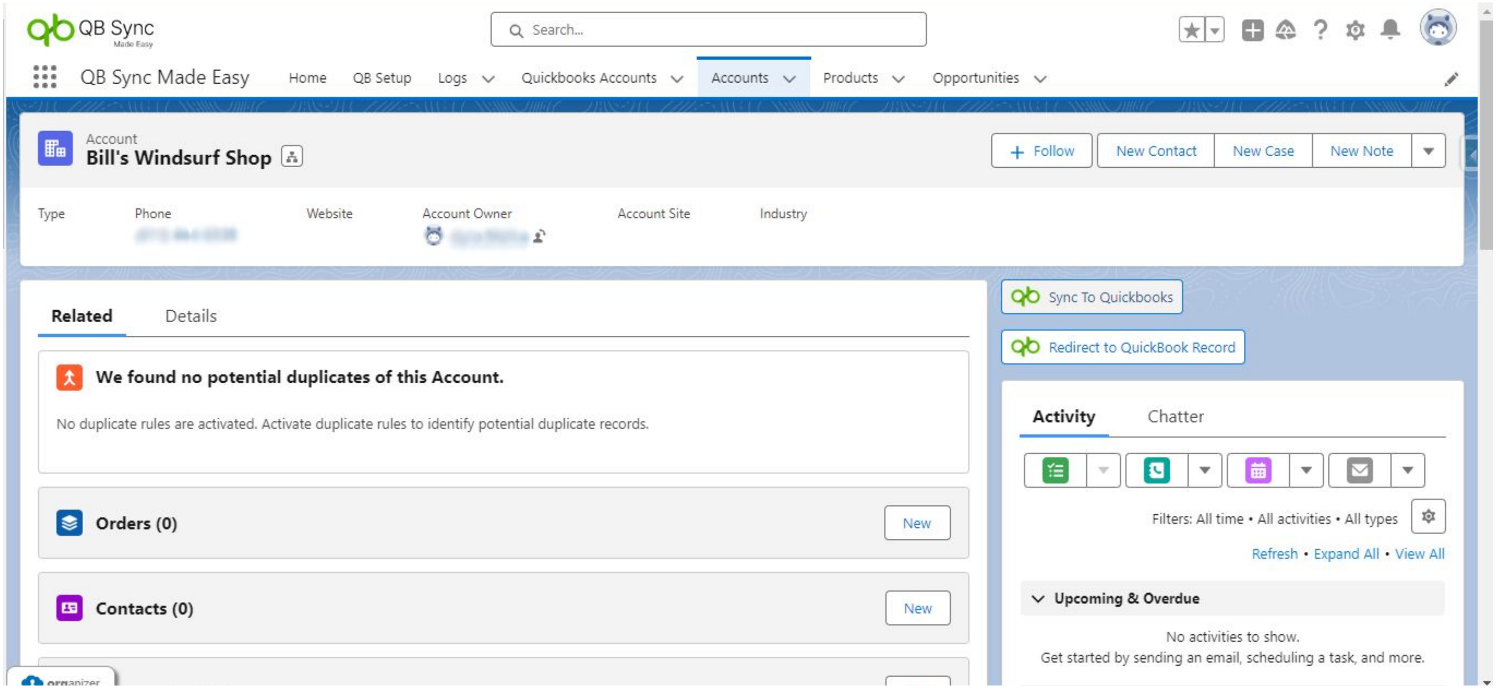
- **Step 22:** Then you can do the Mapping same as above and click on the save button.



- **Step 23:** Now we will show how to sync the Salesforce Account with a quickbooks customer.

- **2.2 First we create the mapping for Account-Customer in object and field setup.**

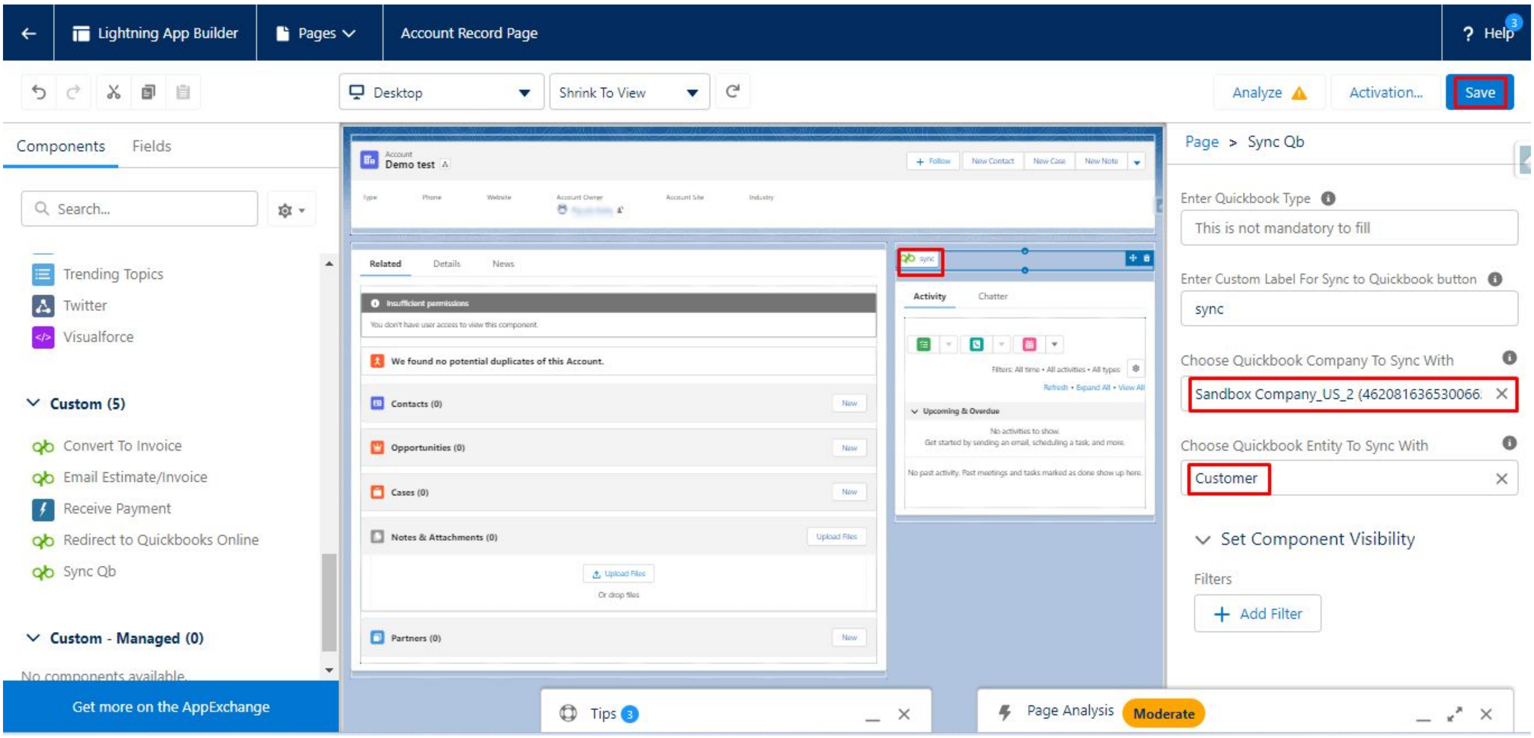
- **2.3 Then go to the account record and click on the Edit page.**

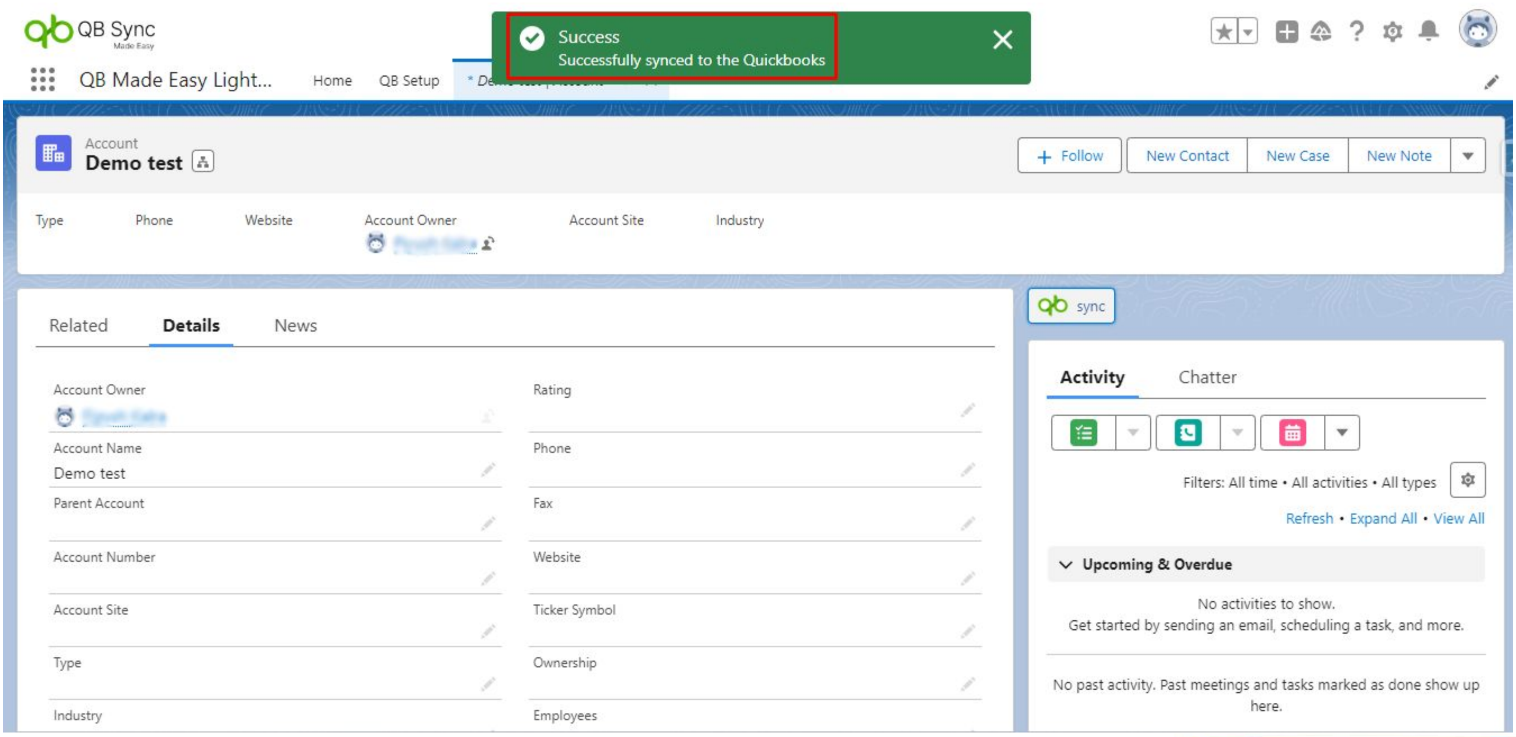


- **2.4 Then you can Drag and Drop Sync Qb custom Button onto the page and Fill in the Required Design Attributes.**
- i) In choosing quickbooks CompanyId Design attribute Select the company Id that you want to sync with(Mapping is required).
- ii) Choose the quickbooks entity Design attribute to Select and sync with.

- ***Note: These two Design Attributes are required to sync.***

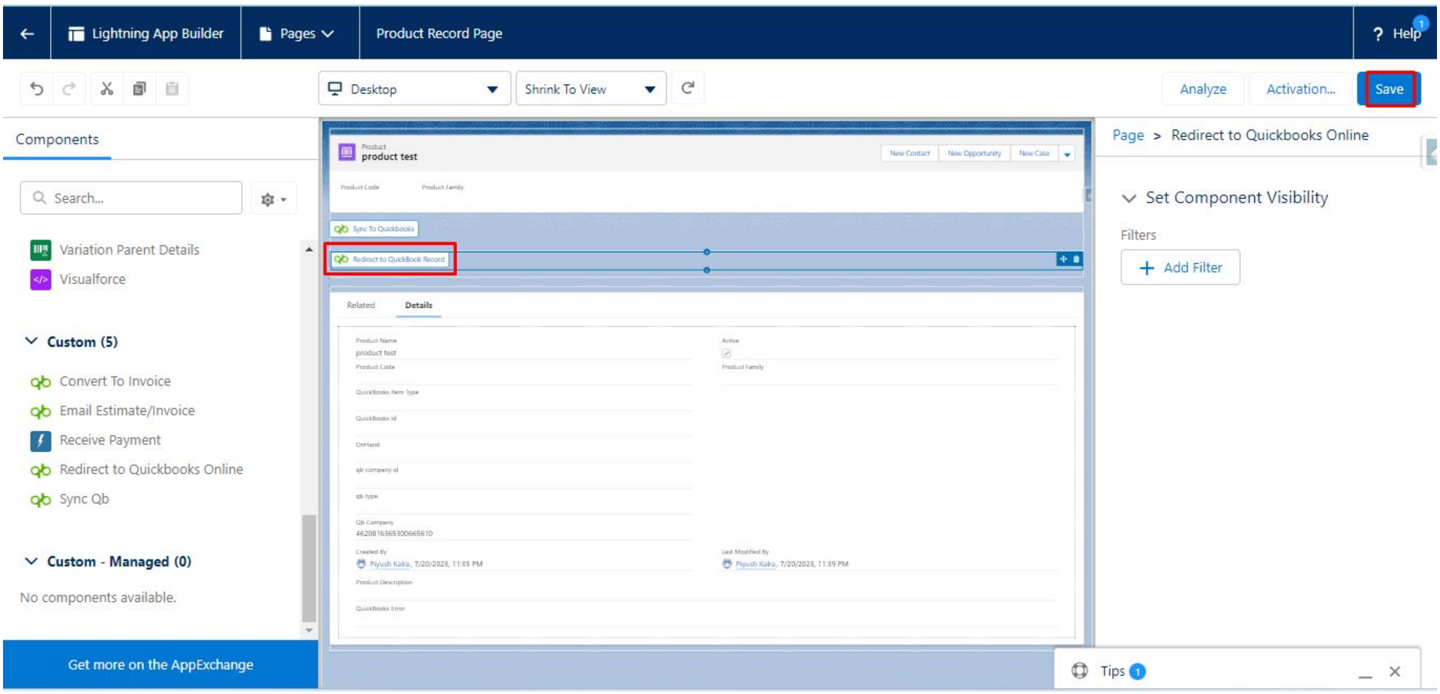
- iii) Now you can Go to the Record and click on the Sync button to Sync that Record in the quickbooks.

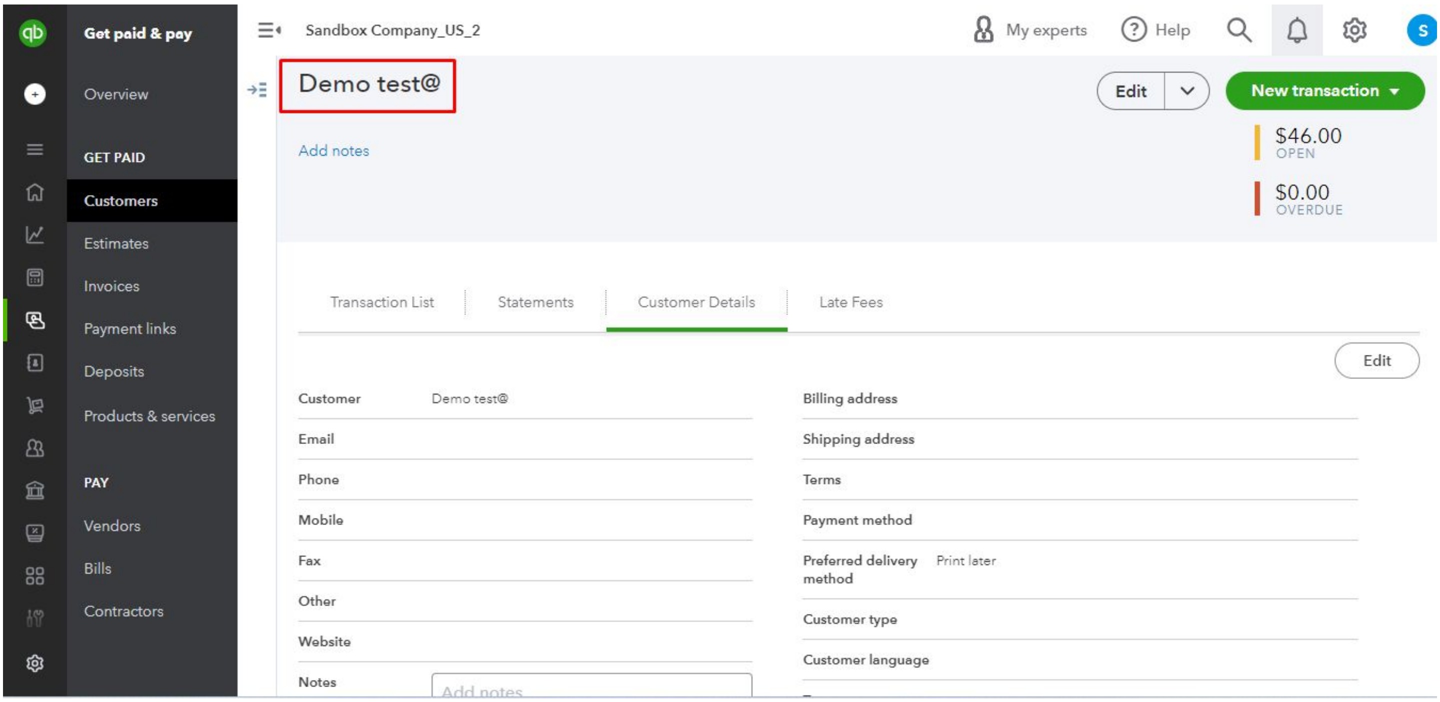




- **Step24:** After you have synced the Record, Go to quickbooks Online and check for the record.

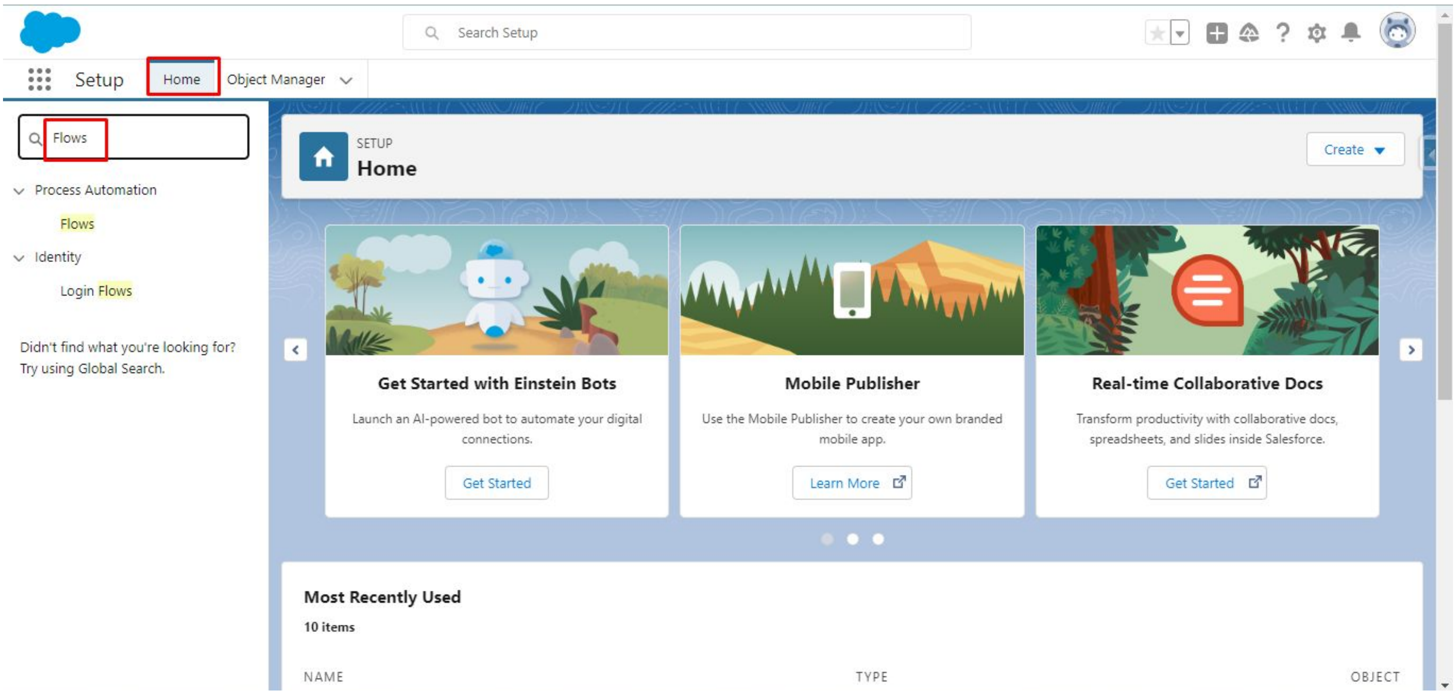
- **Note:** ***You can also add the QB Redirect Button to Redirect into that quickbooks Record.***



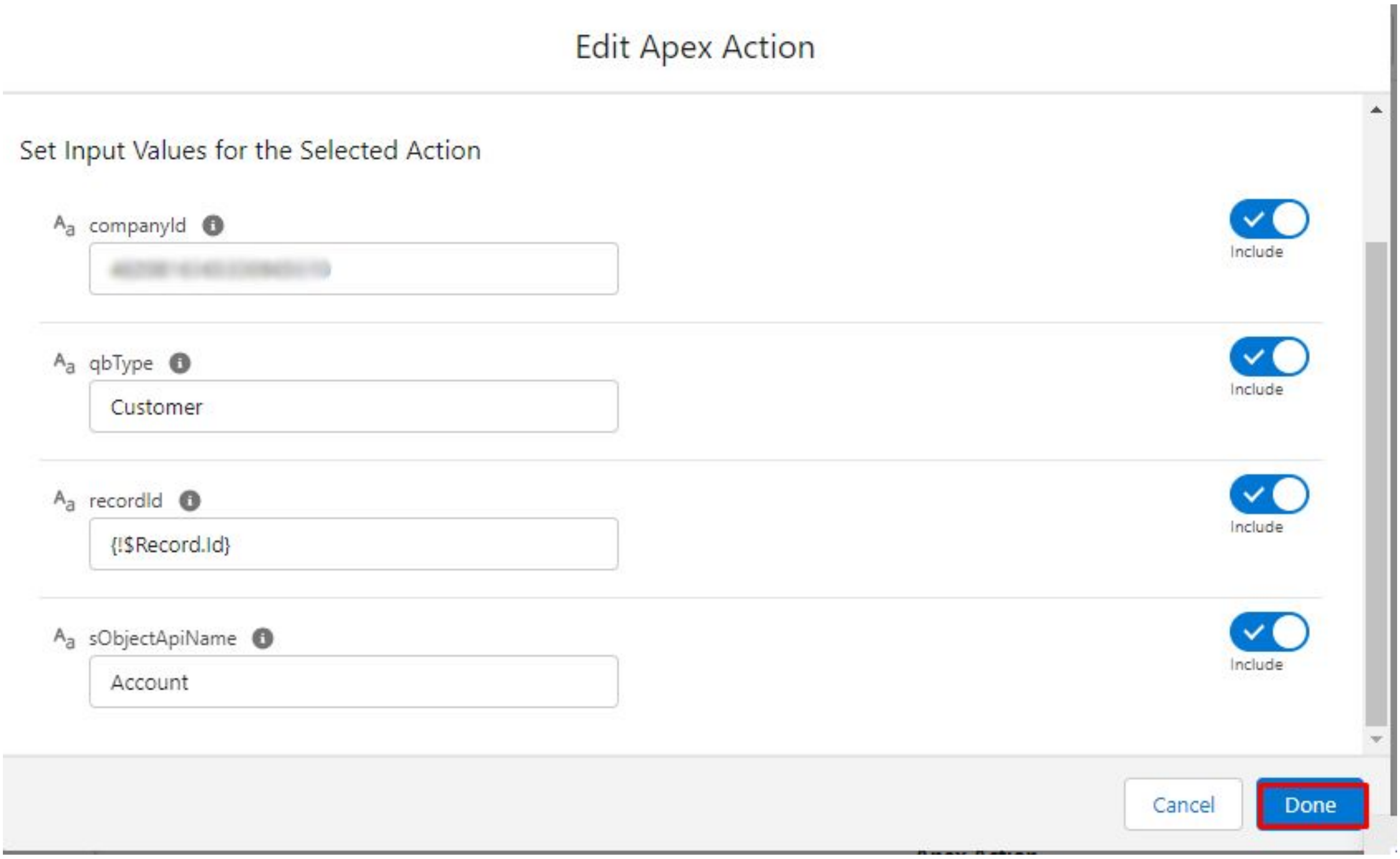


- **Note: You can also Sync record with the help of Record Triggered Flows.**
- 1. Create Flow on the Salesforce Object that you want to sync in quickbooks .

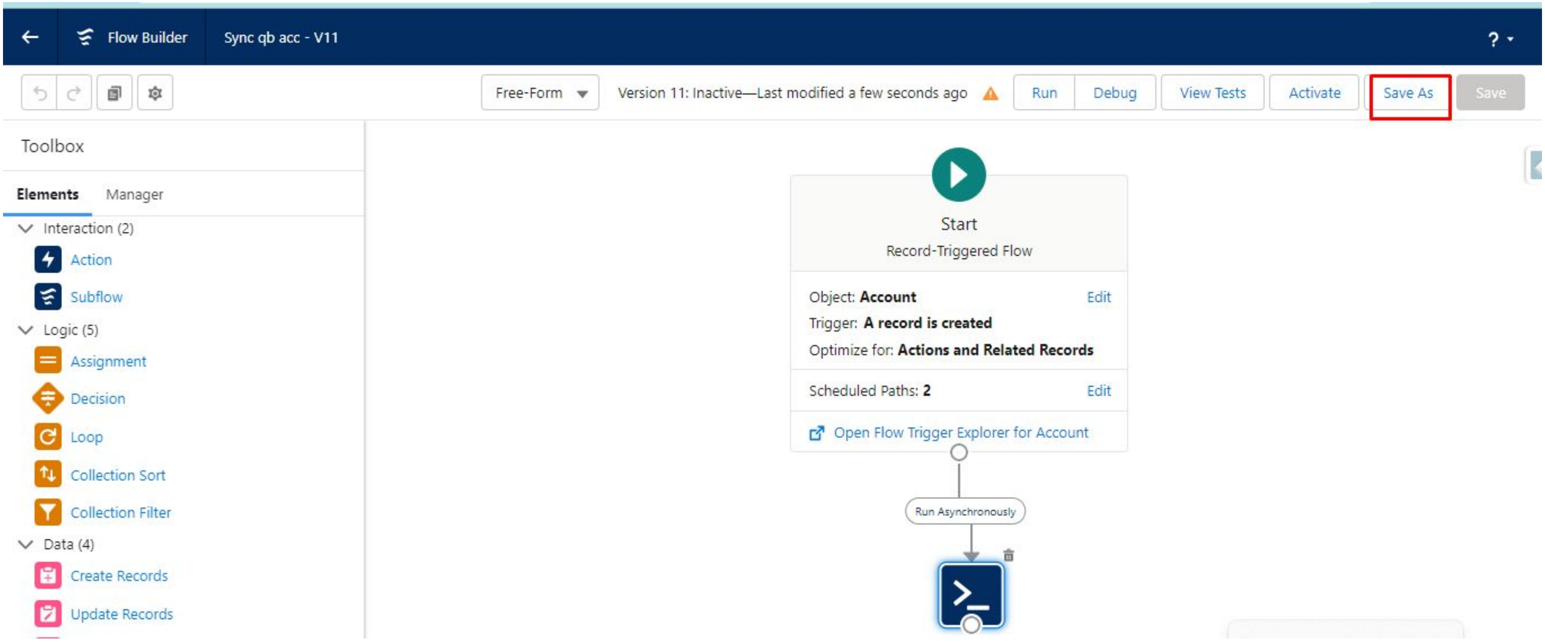
- Go to the home and search the Flows:

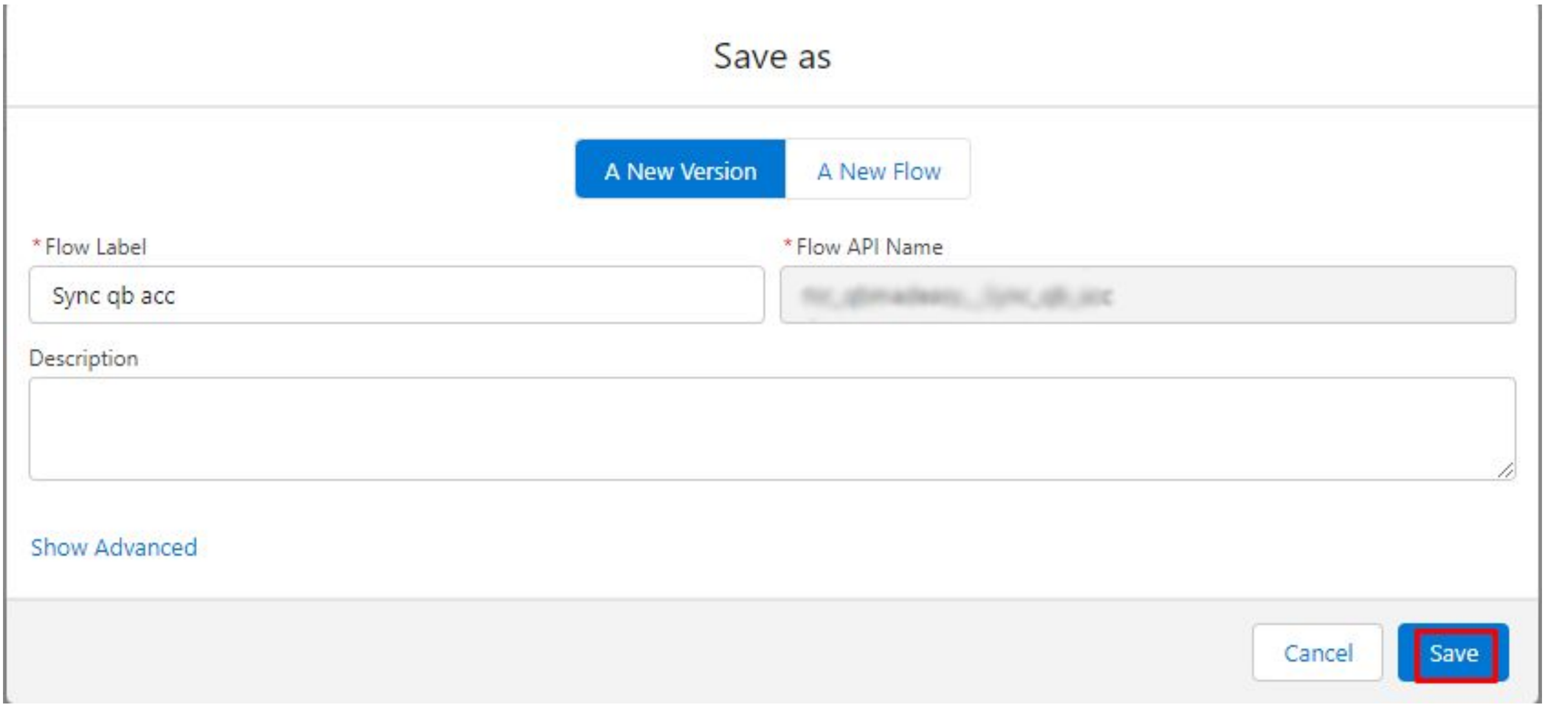


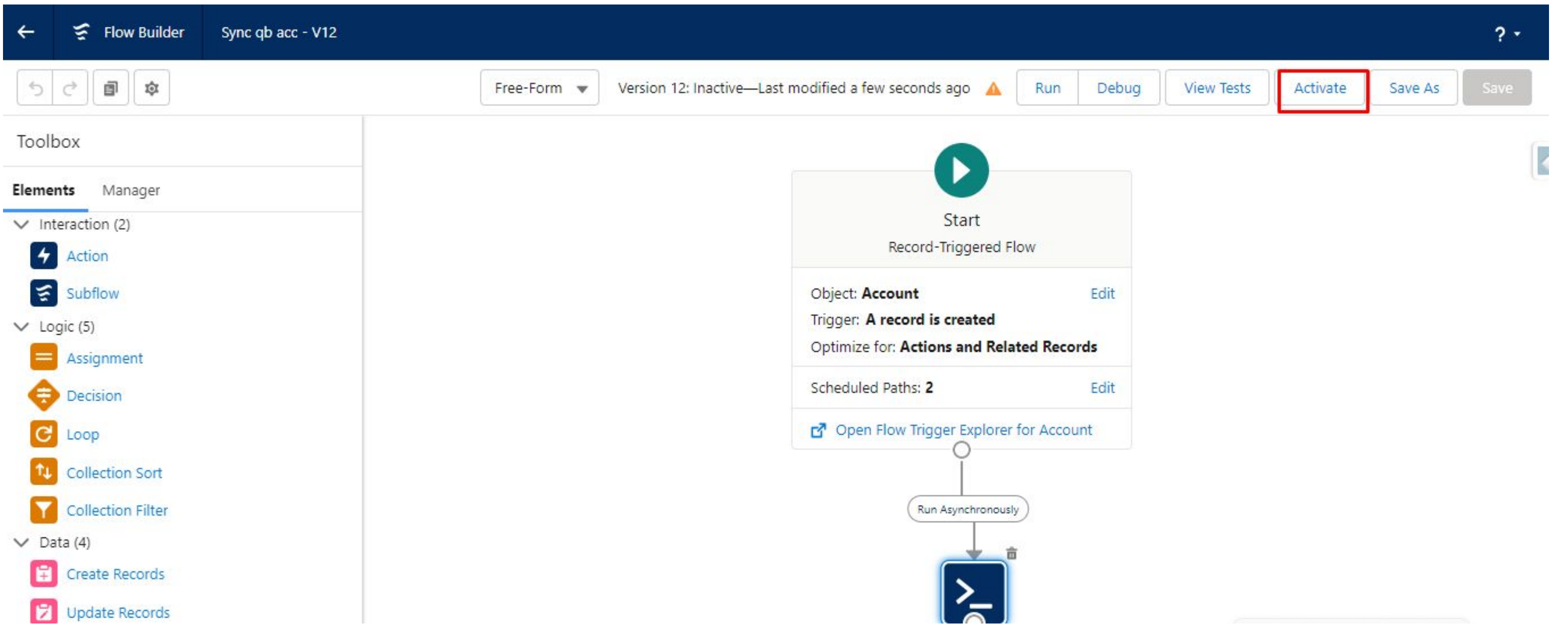
- Then you have Choose the **(QBSyncMadeasy: Create Customer on Account Creation)** and click on the Apex Action Fill required fields in Flow then you have to create an Account.



- Then you have to click on the Save As Button again show the save as page and click on the save button then click on the Activate button Now ur Flow has been activated.


Flow Builder
Sync qb acc - V11
Free-Form
Version 11: Inactive—Last modified a few seconds ago
Run
Debug
View Tests
Activate
Save As
Save
Toolbox
Elements
Manager
Interaction (2)
Action
Subflow
Logic (5)
Assignment
Decision
Loop
Collection Sort
Collection Filter
Data (4)
Create Records
Update Records
Start
Record-Triggered Flow
Object: Account
Edit
Trigger: A record is created
Optimize for: Actions and Related Records
Scheduled Paths: 2
Edit
Open Flow Trigger Explorer for Account
Run Asynchronously

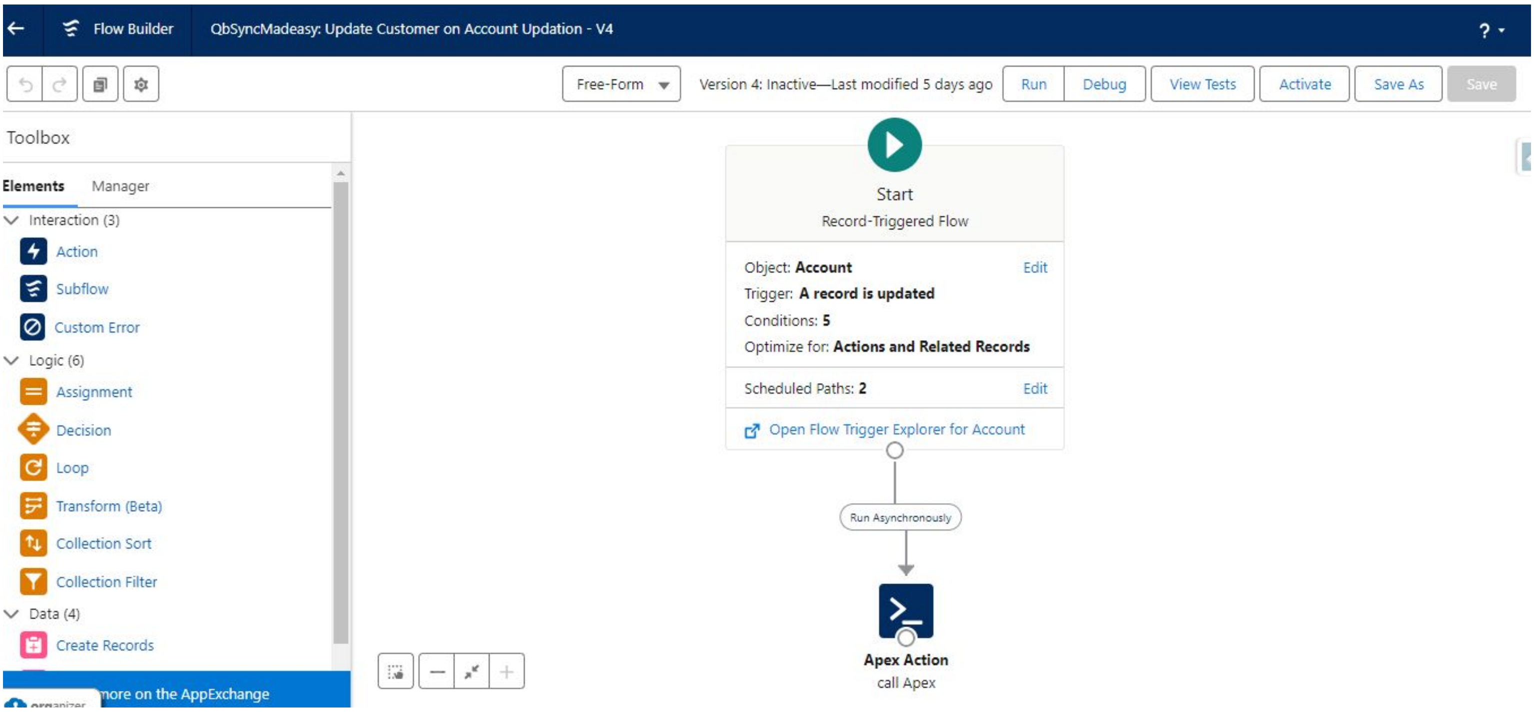

Save as
A New Version
A New Flow
* Flow Label
Sync qb acc
* Flow API Name
Description
Show Advanced
Cancel
Save

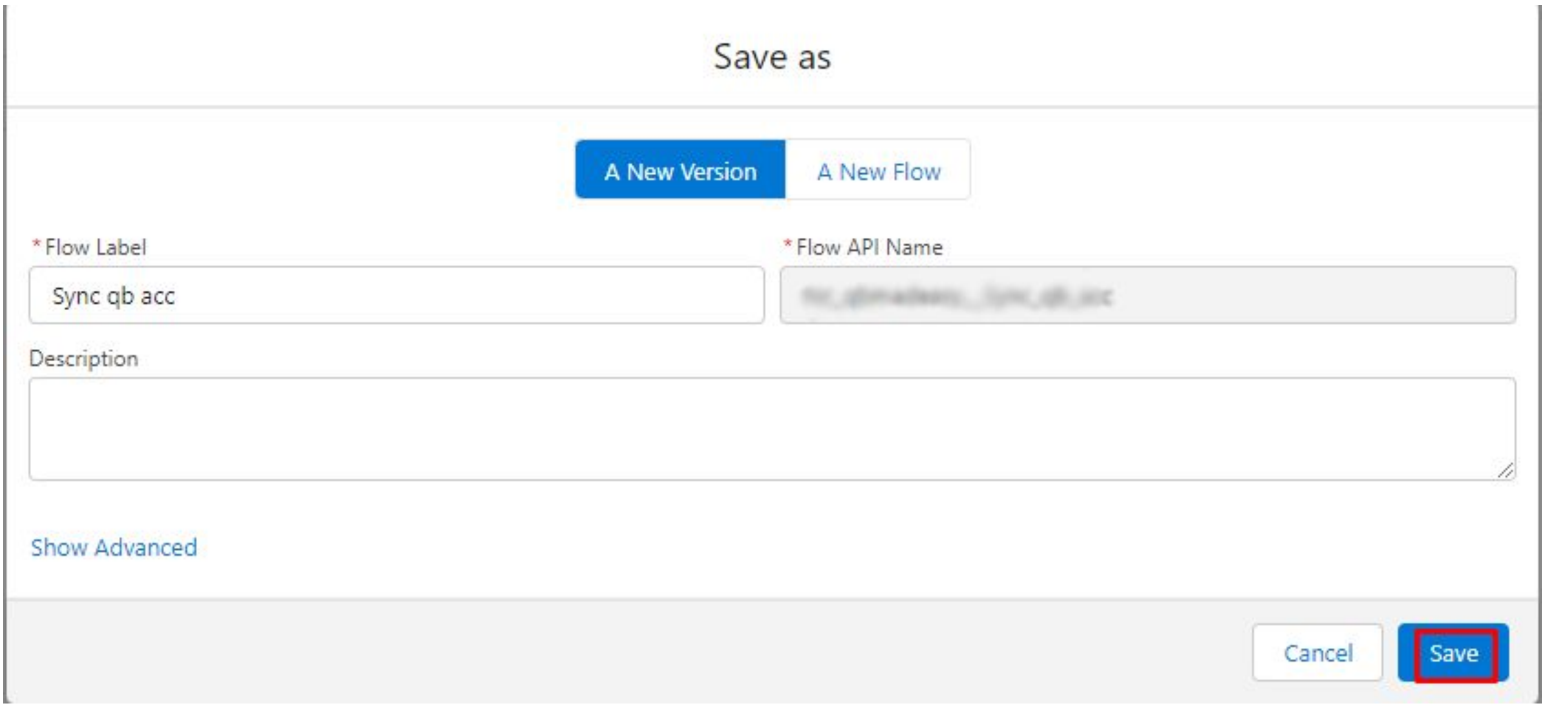


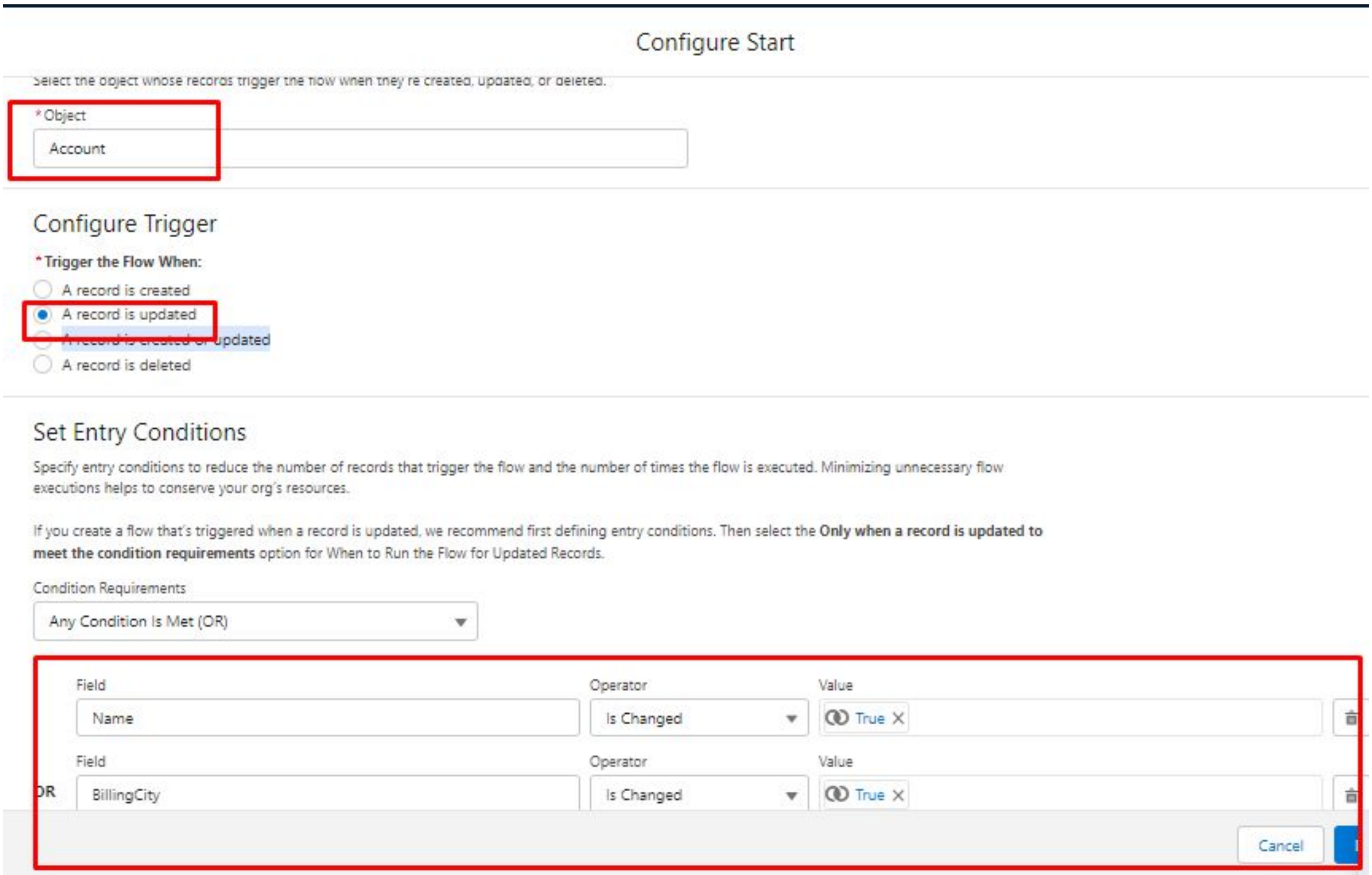
- If you have to update the account you choose **(QBSyncMadeasy: Update Customer on Account Updation)** and click on the Edit and fill the required Fields that you want in Flow.Then you have to click on the Apex Action (Create QB Record) Fill the required fields then you have to Update the account.

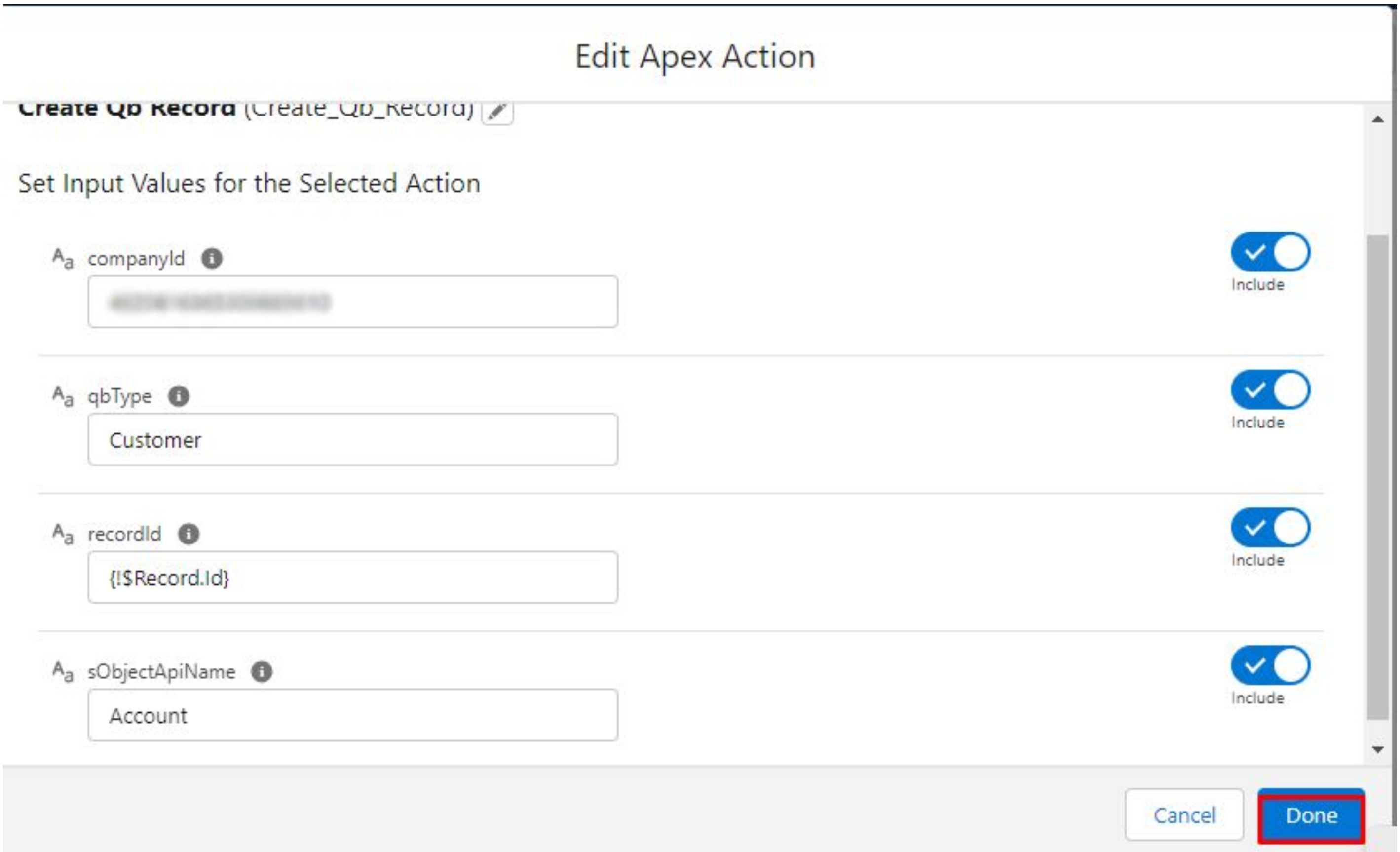
Note: User can replicate the flow to create flows with other objects according to their needs

- Now you have to click on the Save As Button again show the save as page and click on the save button then click on the Activate button Now ur Flow has been activated.

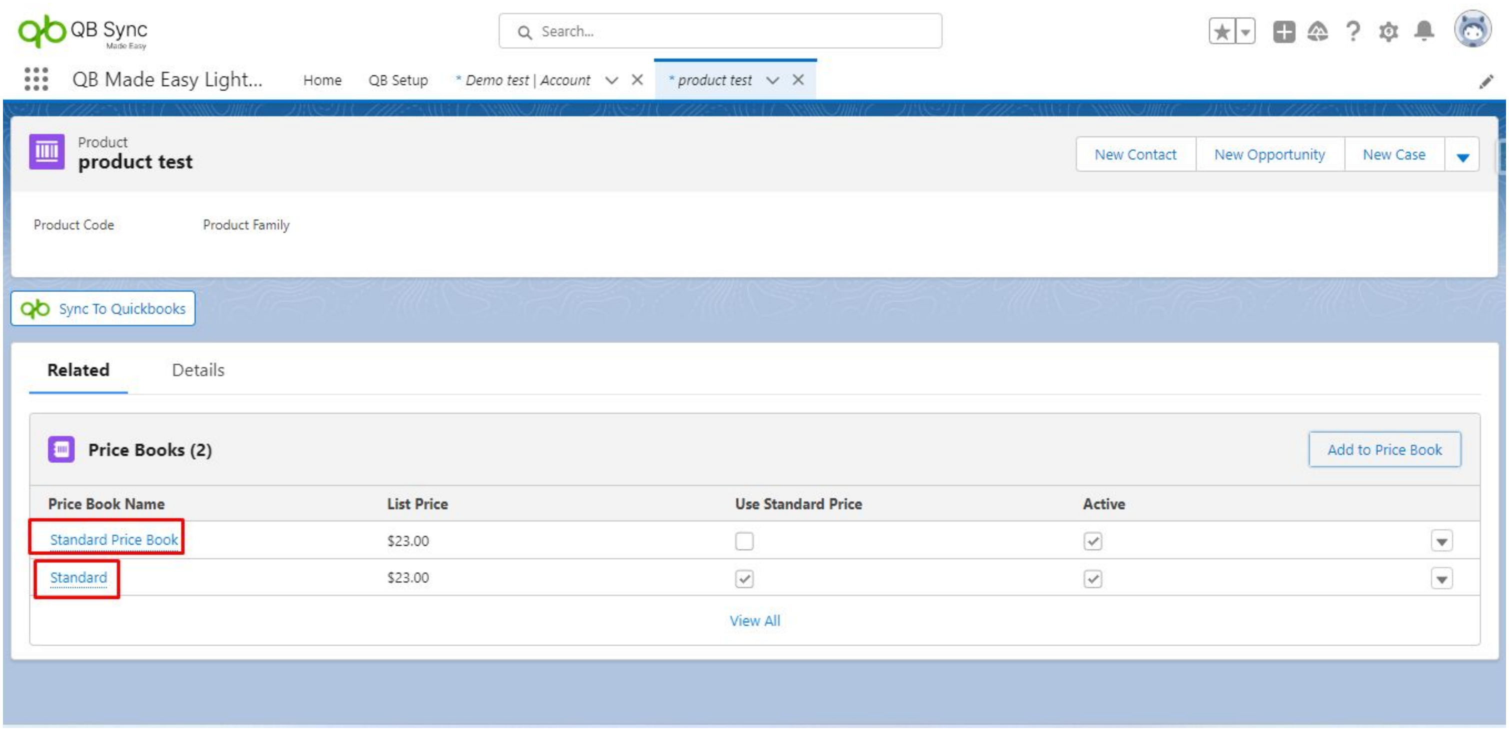




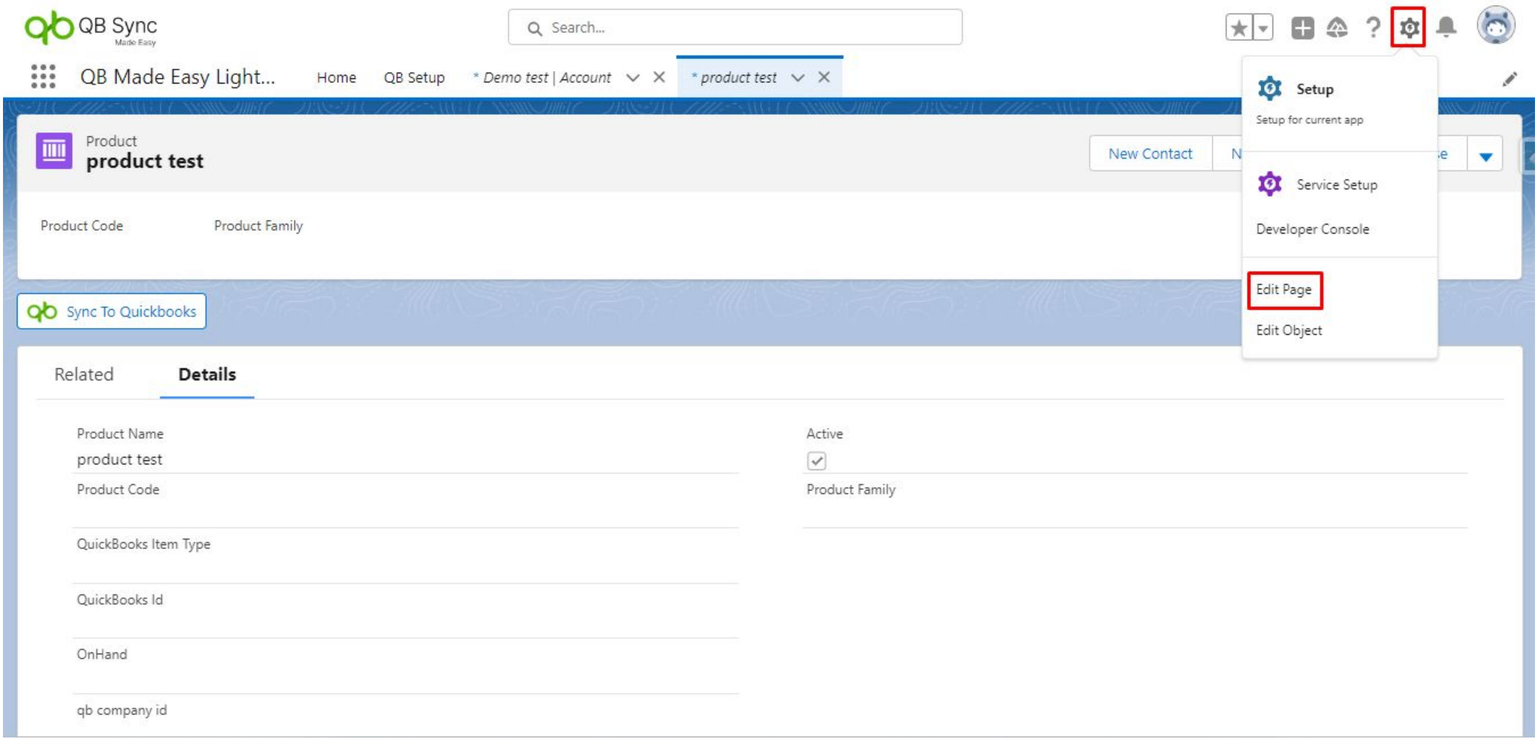

Configure Start
Select the object whose records trigger the flow when they're created, updated, or deleted.
*Object
Account
Configure Trigger
*Trigger the Flow When:
A record is created
A record is updated
A record is created or updated
A record is deleted
Set Entry Conditions
Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.
If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the Only when a record is updated to meet the condition requirements option for When to Run the Flow for Updated Records.
Condition Requirements
Any Condition Is Met (OR)
Field
Operator
Value
Name
Is Changed
True
Field
Operator
Value
OR
BillingCity
Is Changed
True
Cancel


Edit Apex Action
Create Qb Record (Create_Qb_Record)
Set Input Values for the Selected Action
companyId
Include
qbType
Customer
Include
recordId
{!$Record.Id}
Include
sObjectApiName
Account
Include
Cancel
Done

- **3. Create the mapping for Product-Item in the object and field setup.**
- **3.1 After that you can go to the Record Page and click on the Related and Fill the Pricebook. And fill in all the required fields.**



- **3.2. Then go to the Product record and click on the edit page.**



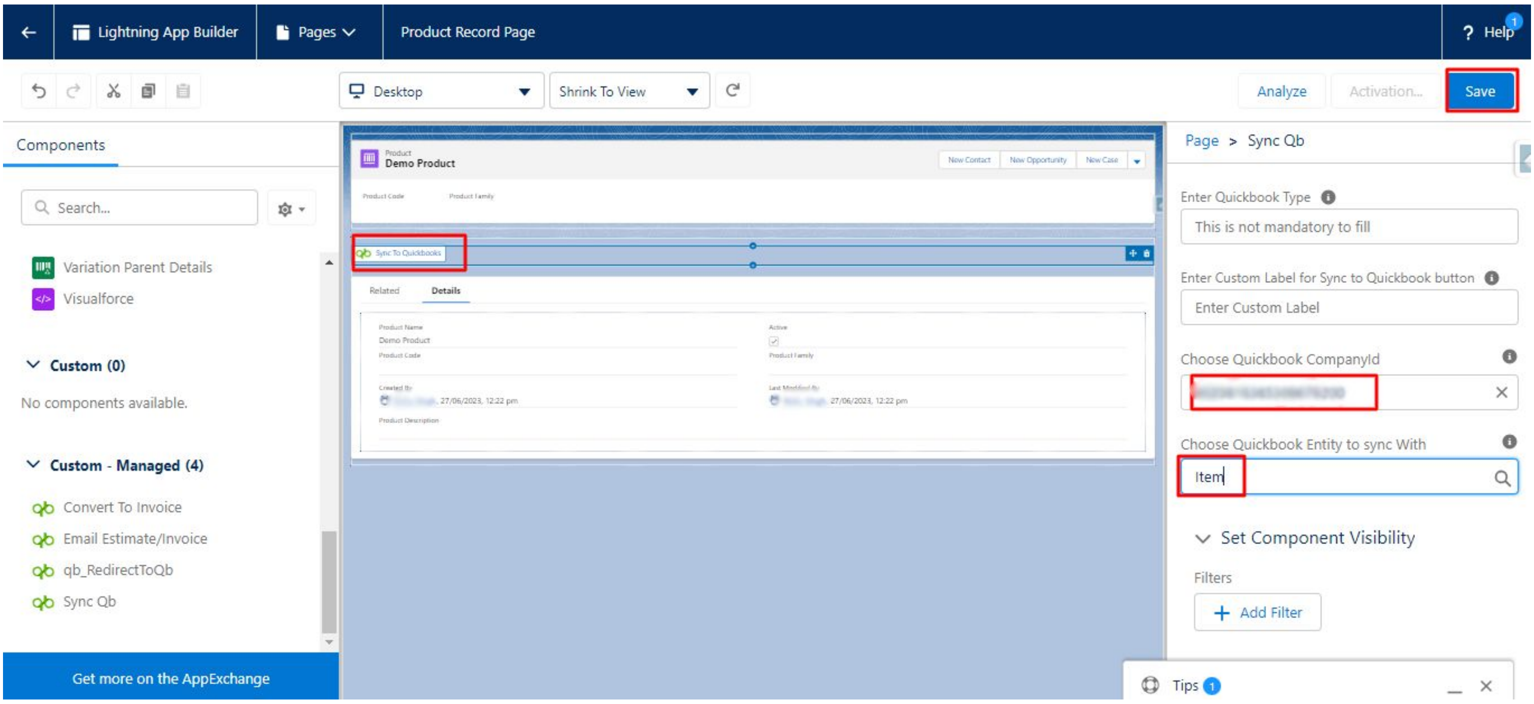
- **3.3 Then you can Drag and Drop Sync Qb custom Button onto the page and Fill in the Required Design Attributes.**

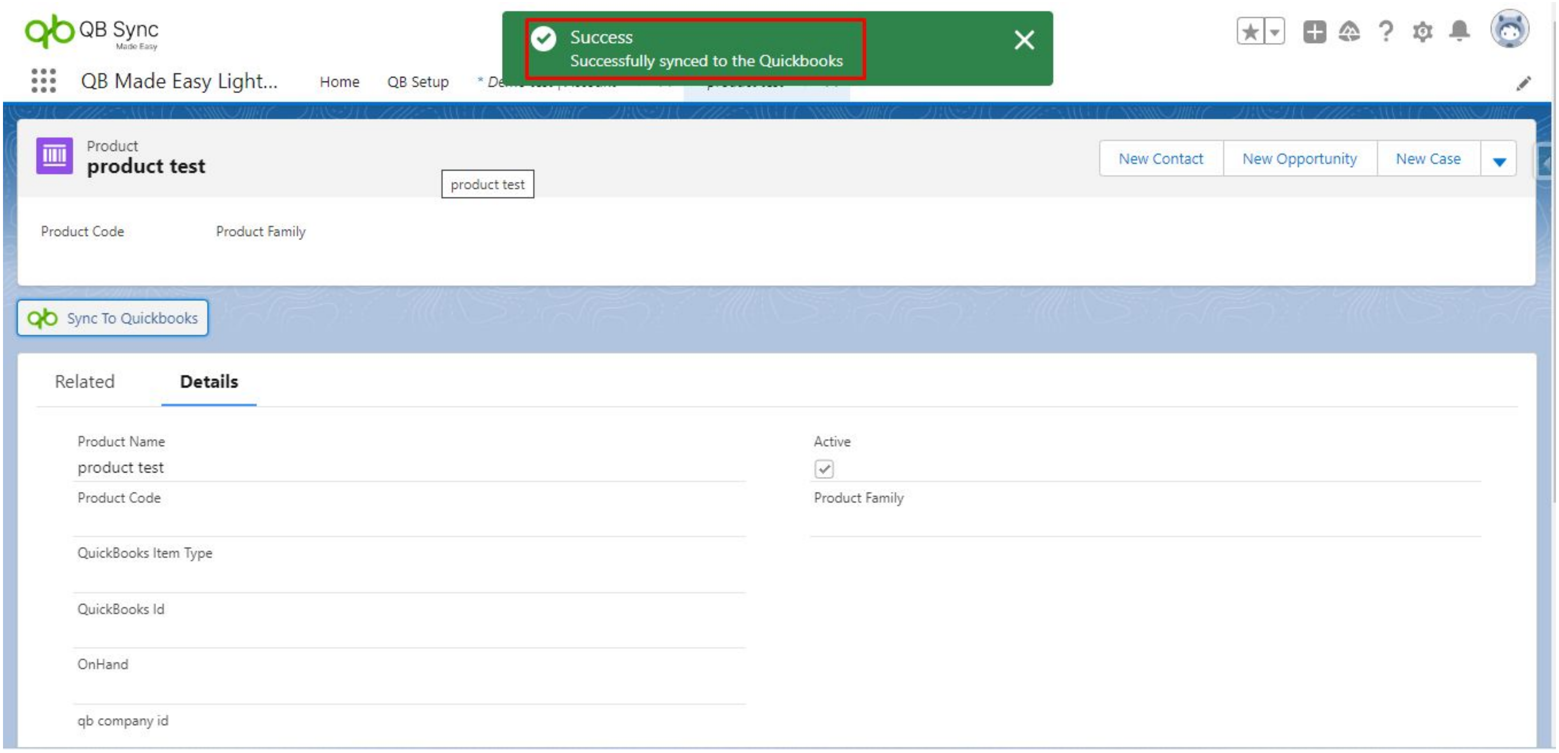
i) In choosing quickbooks CompanyId Design attribute, Select the company Id that you want to sync with (Mapping is required).

ii) Choose the quickbooks entity Design attribute to Select and sync with.

Note: These two Design Attributes are required to sync.

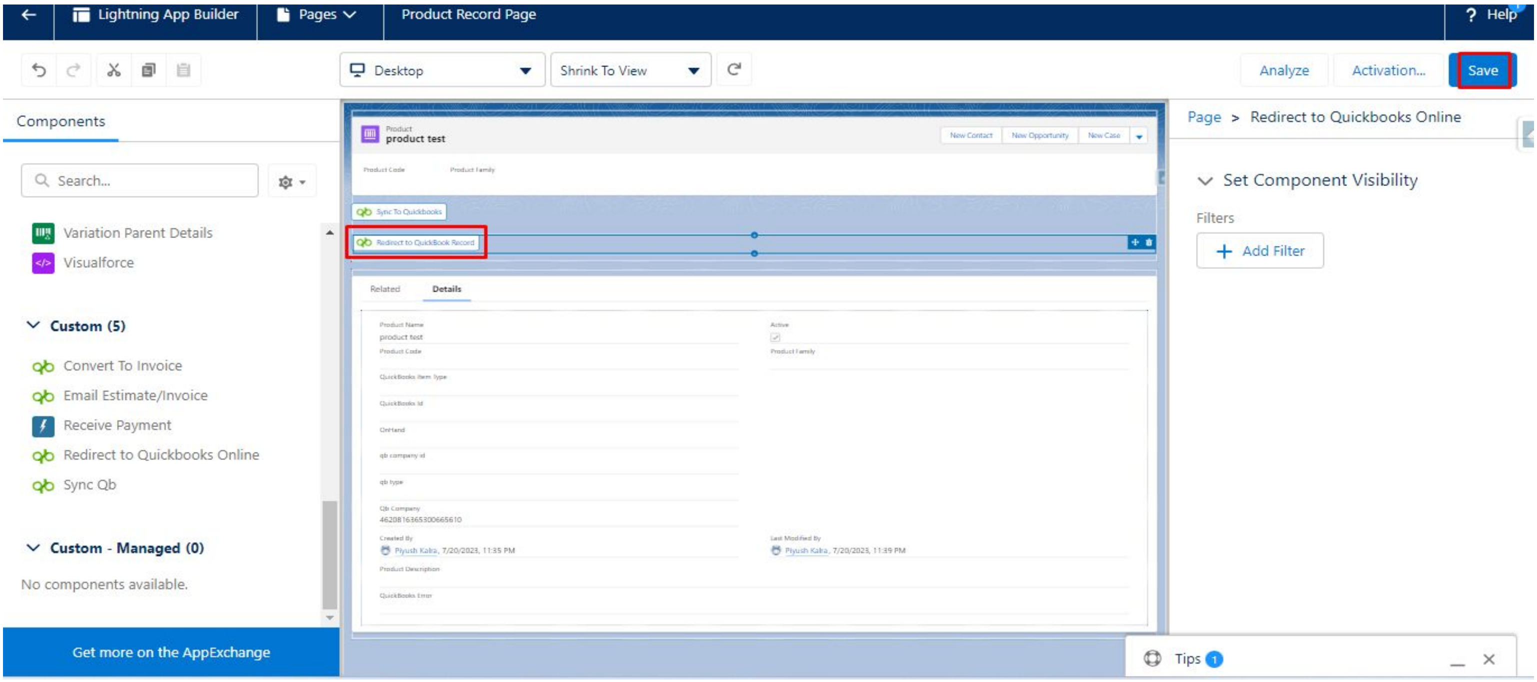
iii) Now you can Go to the Record and click on the Sync QB button to Sync that Record in the quickbooks.

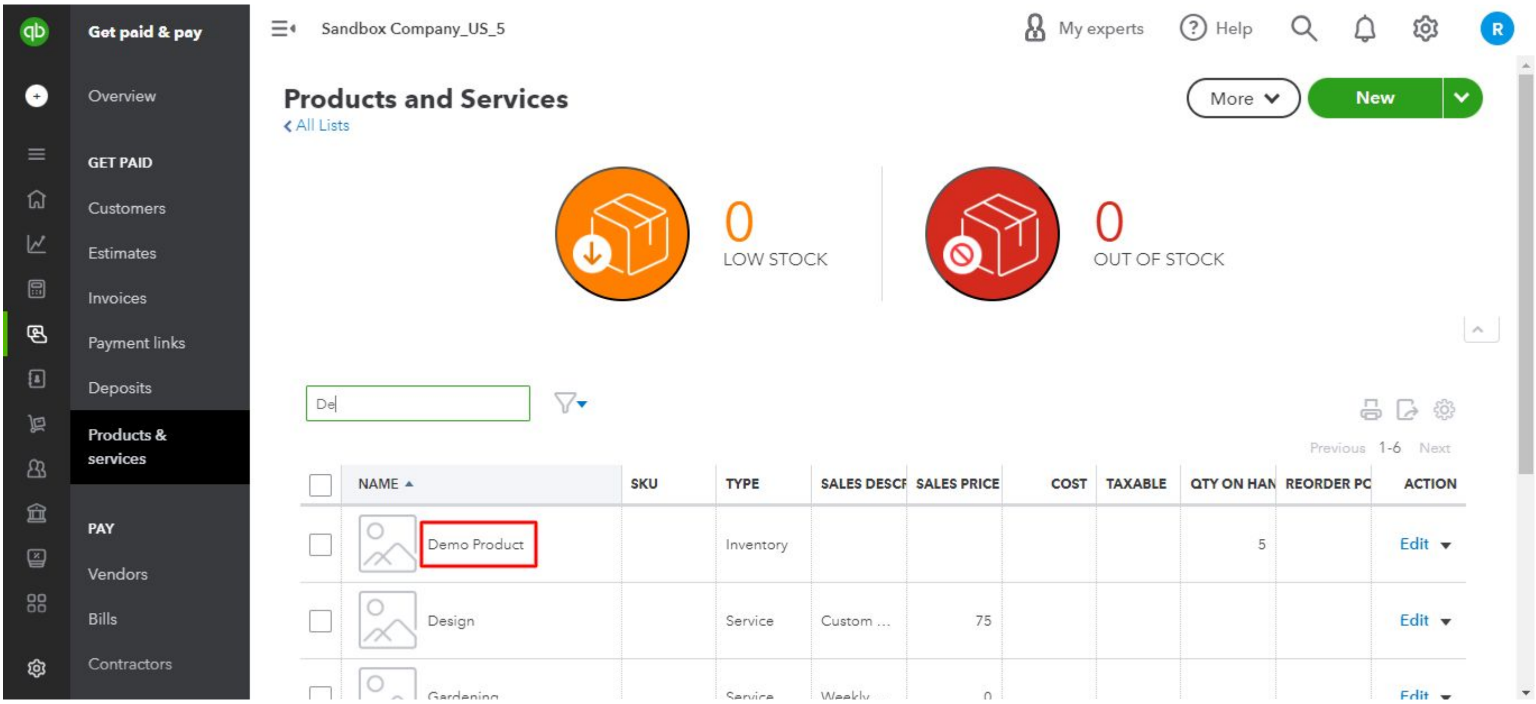

Lightning App Builder
Pages
Product Record Page
Help
Desktop
Shrink To View
Analyze
Activation...
Save
Components
Search...
Variation Parent Details
Visualforce
Custom (0)
No components available.
Custom - Managed (4)
Convert To Invoice
Email Estimate/Invoice
qb_RedirectToQb
Sync Qb
Get more on the AppExchange
Demo Product
Related
Details
Page > Sync Qb
Enter Quickbook Type
This is not mandatory to fill
Enter Custom Label for Sync to Quickbook button
Enter Custom Label
Choose Quickbook CompanyId
Choose Quickbook Entity to sync With
Item
Set Component Visibility
Filters
Add Filter
Tips


QB Sync
Success
Successfully synced to the Quickbooks
QB Made Easy Light...
Home
QB Setup
Product
product test
product test
New Contact
New Opportunity
New Case
Product Code
Product Family
Sync To Quickbooks
Related
Details
Product Name
product test
Active
Product Code
Product Family
QuickBooks Item Type
QuickBooks Id
OnHand
qb company id

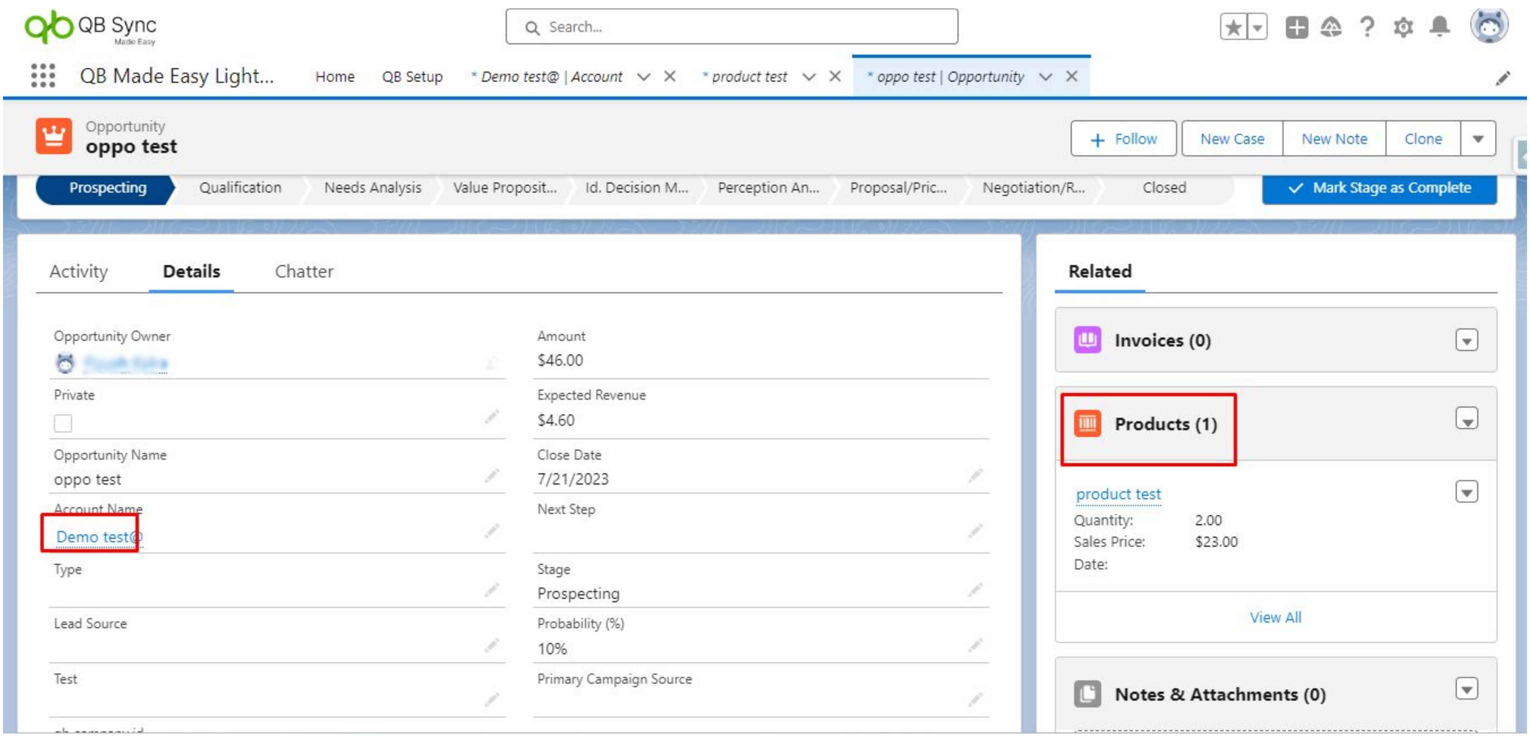
- **Step25:** After you have synced the Record, Go to quickbooks Online and check for the record.

Note: You can also add the QB Redirect Button to Redirect into that quickbooks Record.

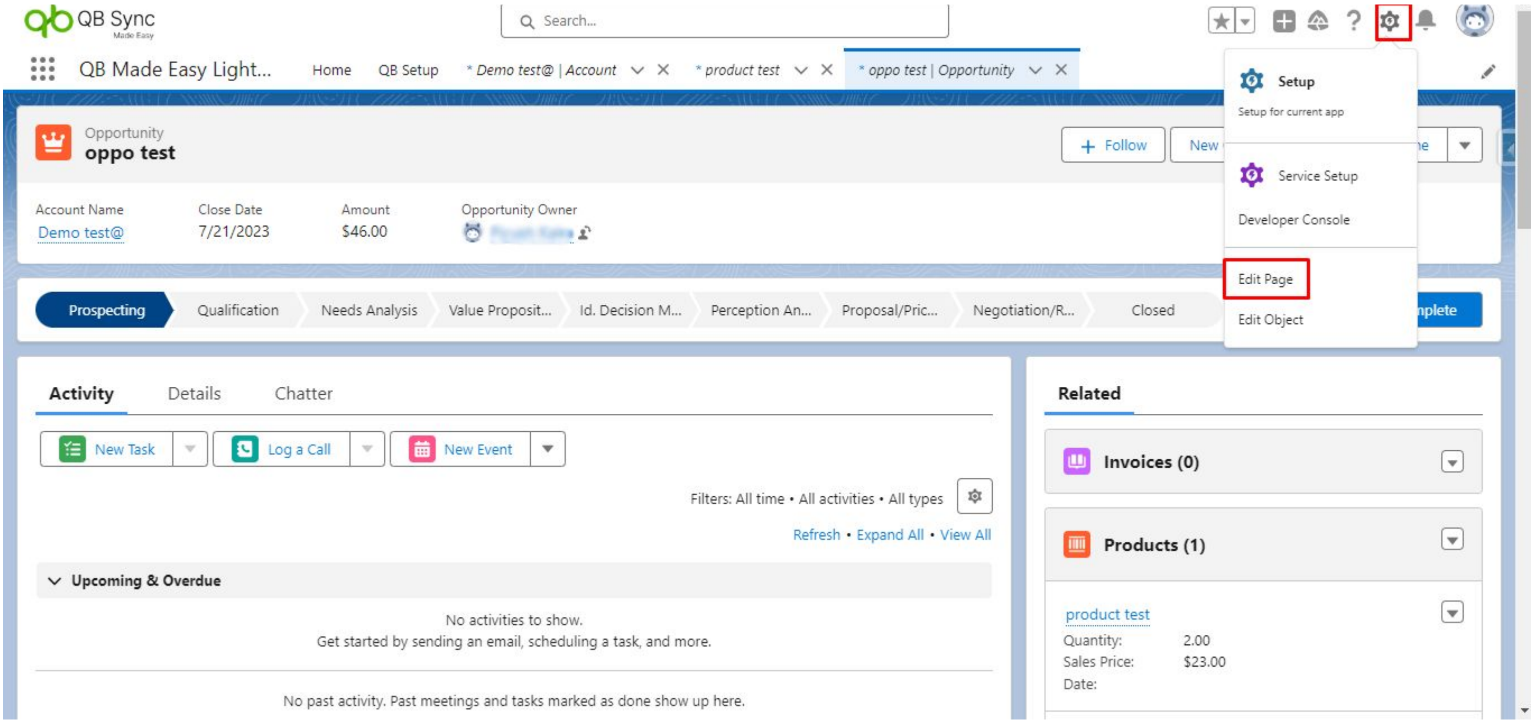




- **4. Create the mapping for Opportunity-Estimate in object and field setup.**
- **4.1 After that you can go to the Record. Add the Account and Product that you have to Sync.**



- **4.2 Then go to the Opportunity record and click on the edit page.**

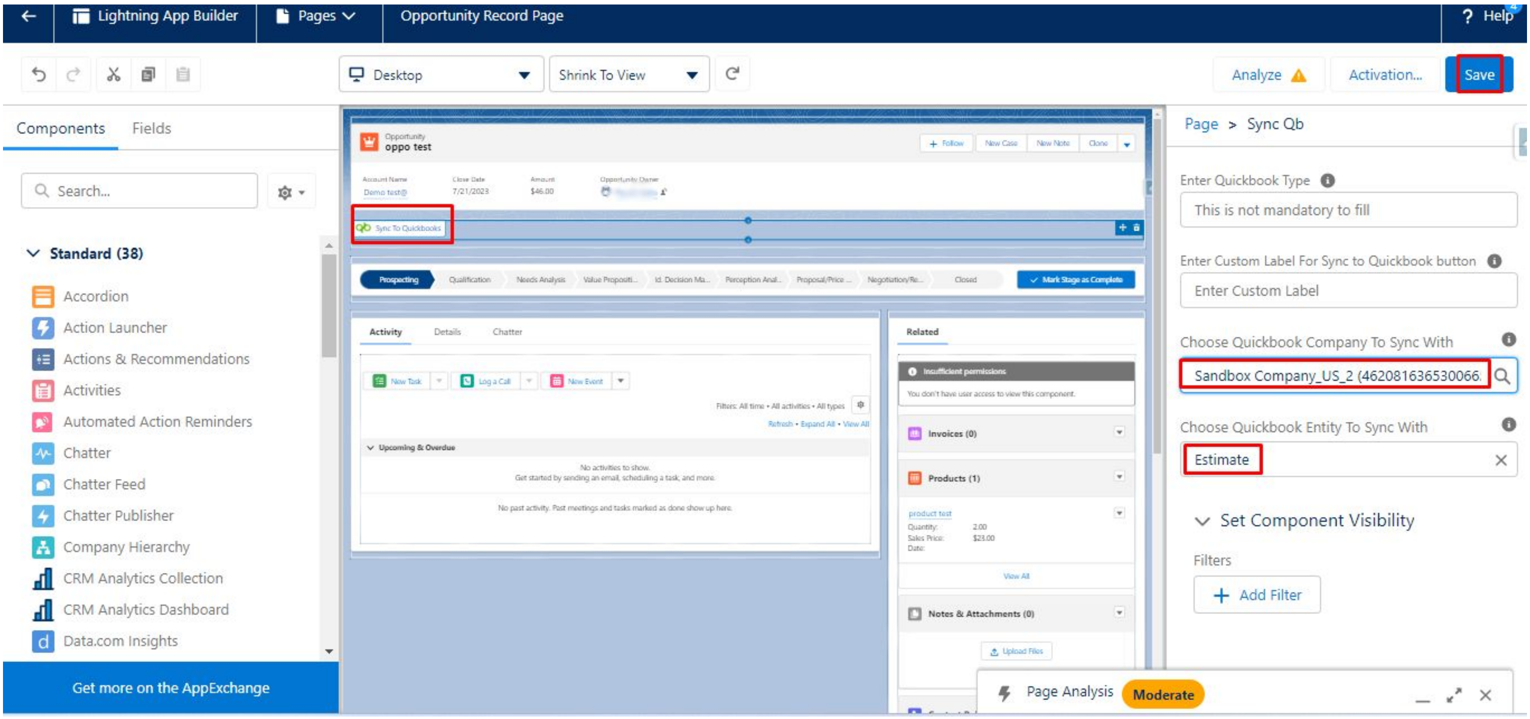


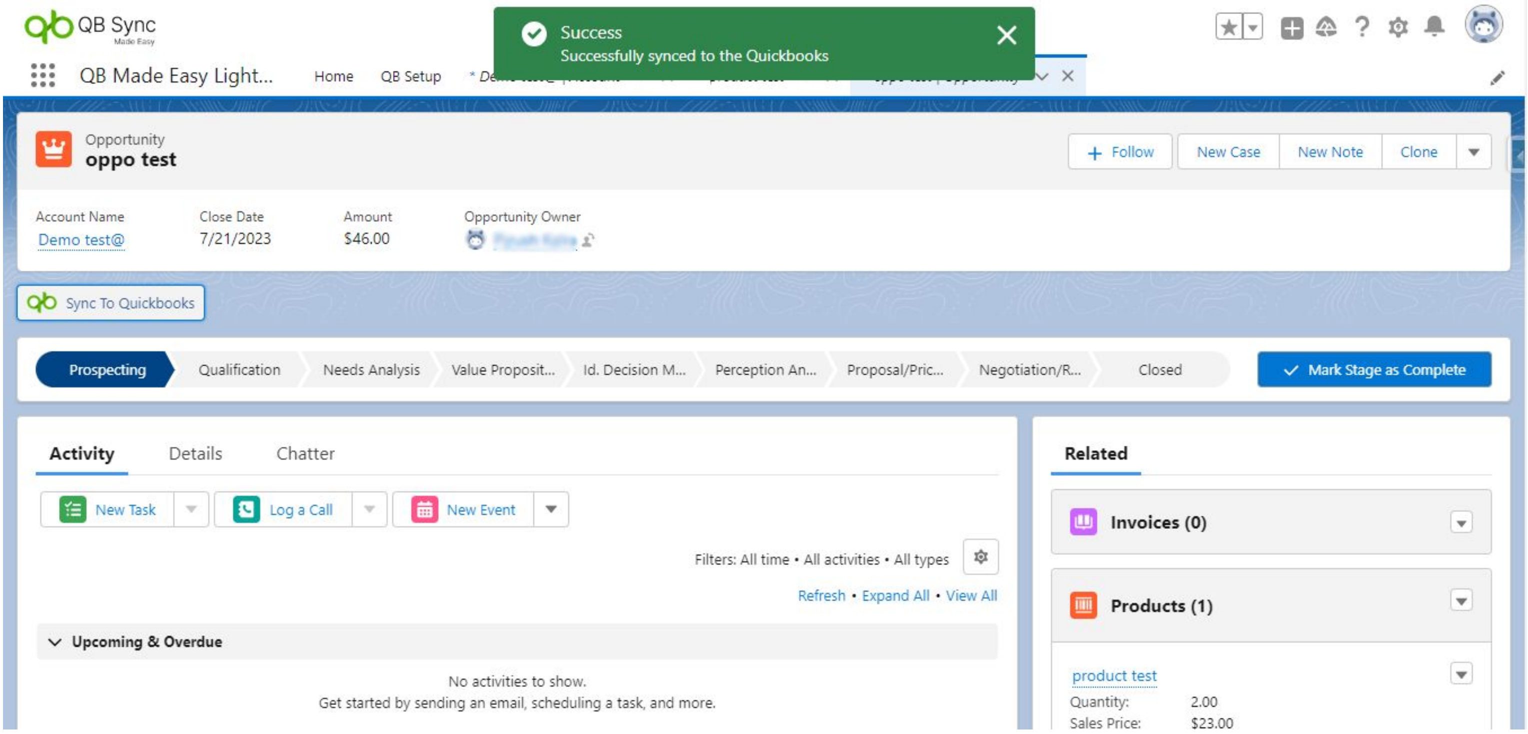
- **4.3 Then you can Drag and Drop Sync Qb custom Button onto the page and Fill in the Required Design Attributes.**

i) In choosing quickbooks CompanyId Design attribute Select the company Id that you want to sync with (Mapping is required)

ii) Choose the quickbooks entity Design attribute to Select and sync with.

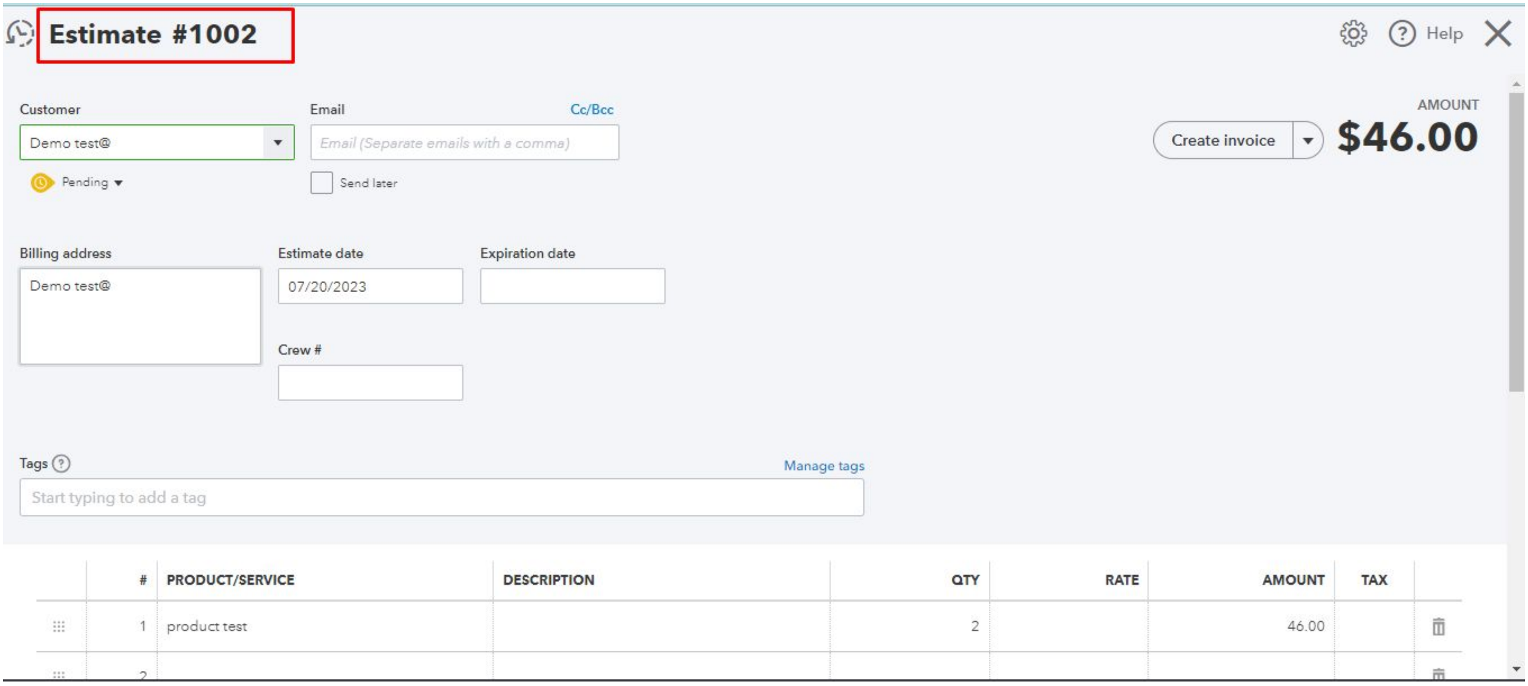
Note: ***These two Design Attributes are required to sync***


Lightning App Builder
Pages
Opportunity Record Page
Help
Desktop
Shrink To View
Analyze
Activation...
Save
Components
Fields
Search...
Standard (38)
Accordion
Action Launcher
Actions & Recommendations
Activities
Automated Action Reminders
Chatter
Chatter Feed
Chatter Publisher
Company Hierarchy
CRM Analytics Collection
CRM Analytics Dashboard
Data.com Insights
Get more on the AppExchange
Page > Sync Qb
Enter Quickbook Type
This is not mandatory to fill
Enter Custom Label For Sync to Quickbook button
Enter Custom Label
Choose Quickbook Company To Sync With
Sandbox Company_US_2 (462081636530066
Choose Quickbook Entity To Sync With
Estimate
Set Component Visibility
Filters
Add Filter
Page Analysis
Moderate


QB Sync
Made Easy
Success
Successfully synced to the Quickbooks
QB Made Easy Light...
Home
QB Setup
Opportunity
oppo test
Follow
New Case
New Note
Clone
Account Name
Demo test@
Close Date
7/21/2023
Amount
$46.00
Opportunity Owner
Sync To Quickbooks
Prospecting
Qualification
Needs Analysis
Value Proposit...
Id. Decision M...
Perception An...
Proposal/Pric...
Negotiation/R...
Closed
Mark Stage as Complete
Activity
Details
Chatter
New Task
Log a Call
New Event
Filters: All time • All activities • All types
Refresh • Expand All • View All
Upcoming & Overdue
No activities to show.
Get started by sending an email, scheduling a task, and more.
Related
Invoices (0)
Products (1)
product test
Quantity: 2.00
Sales Price: $23.00

- **Step 26:** After you have synced the Record, Go to quickbooks Online and check for the record.

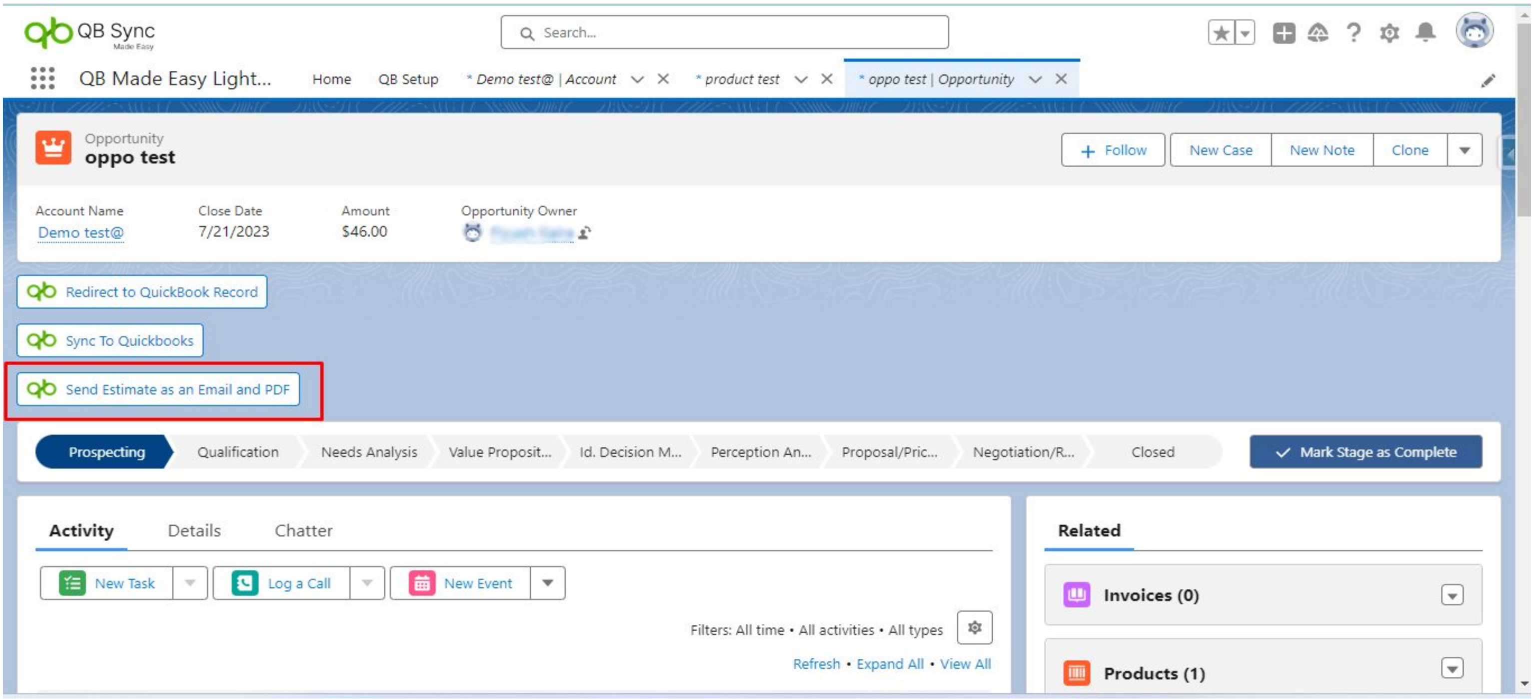
Note: ***You can also add the QB Redirect Button to Redirect into that quickbooks Record.***

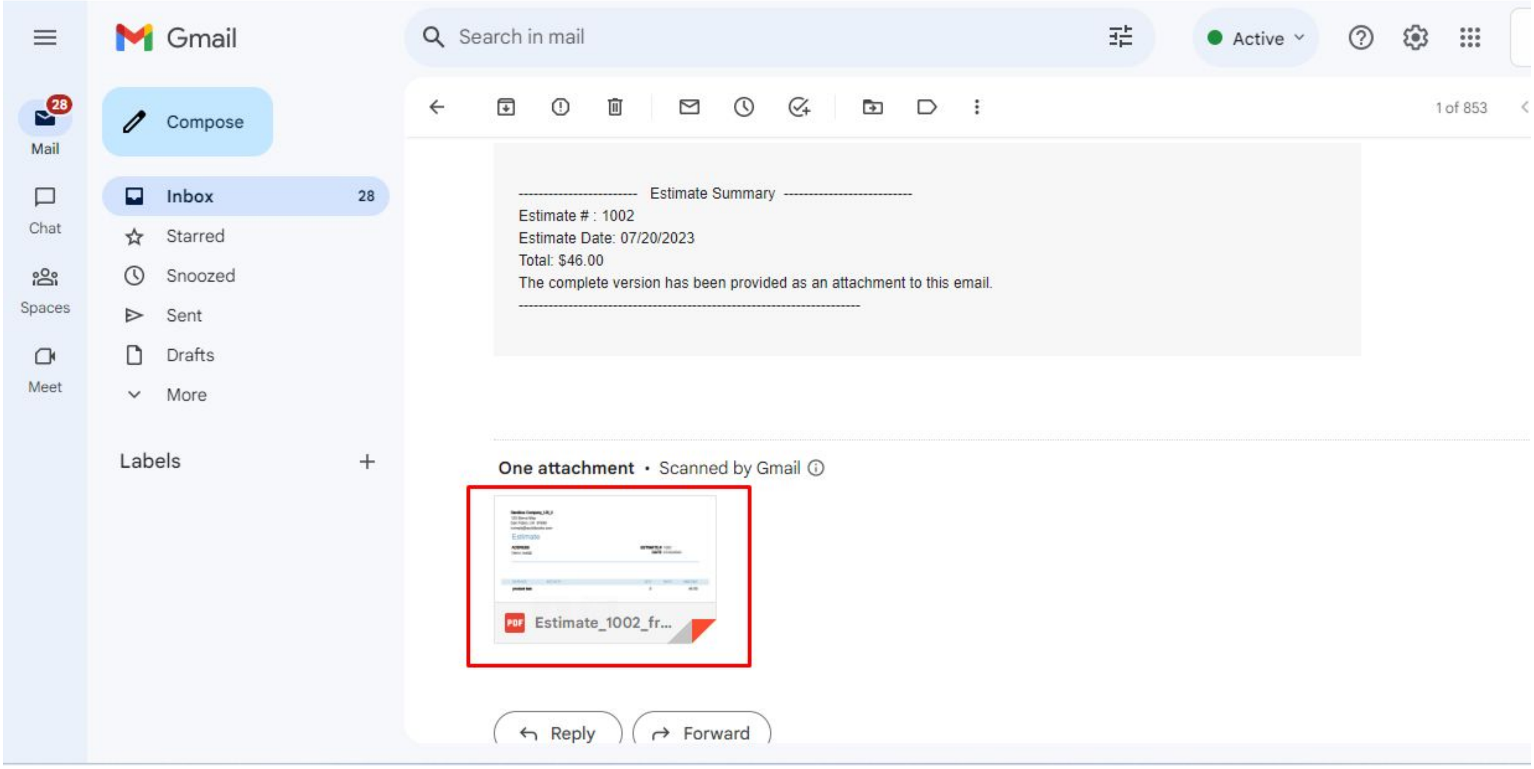


4.4 Sending Estimate to an Email From Salesforce.

Step 27: Add the button to a record page(Which is Synced with quickbooks Estimate).

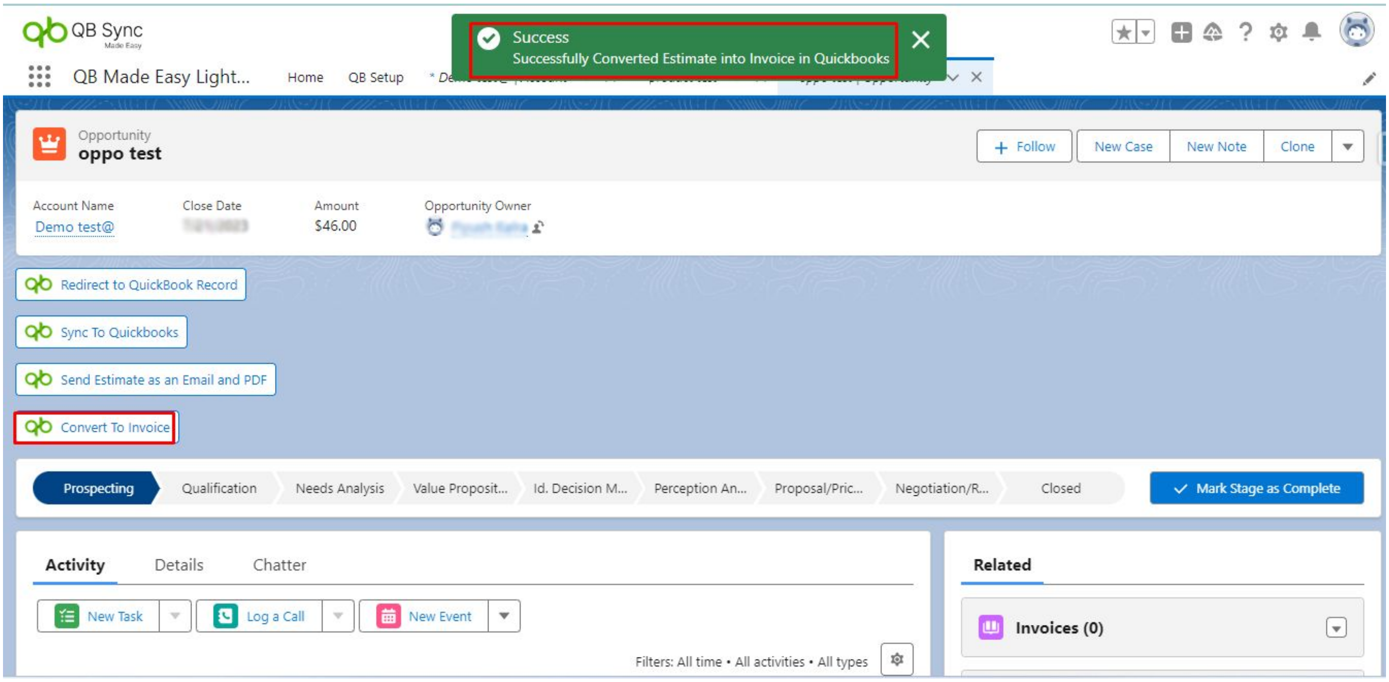
Step 28: The model will pop up here you can fill in the Email and Click on the Send button to send that Estimate as a pdf to the Email.



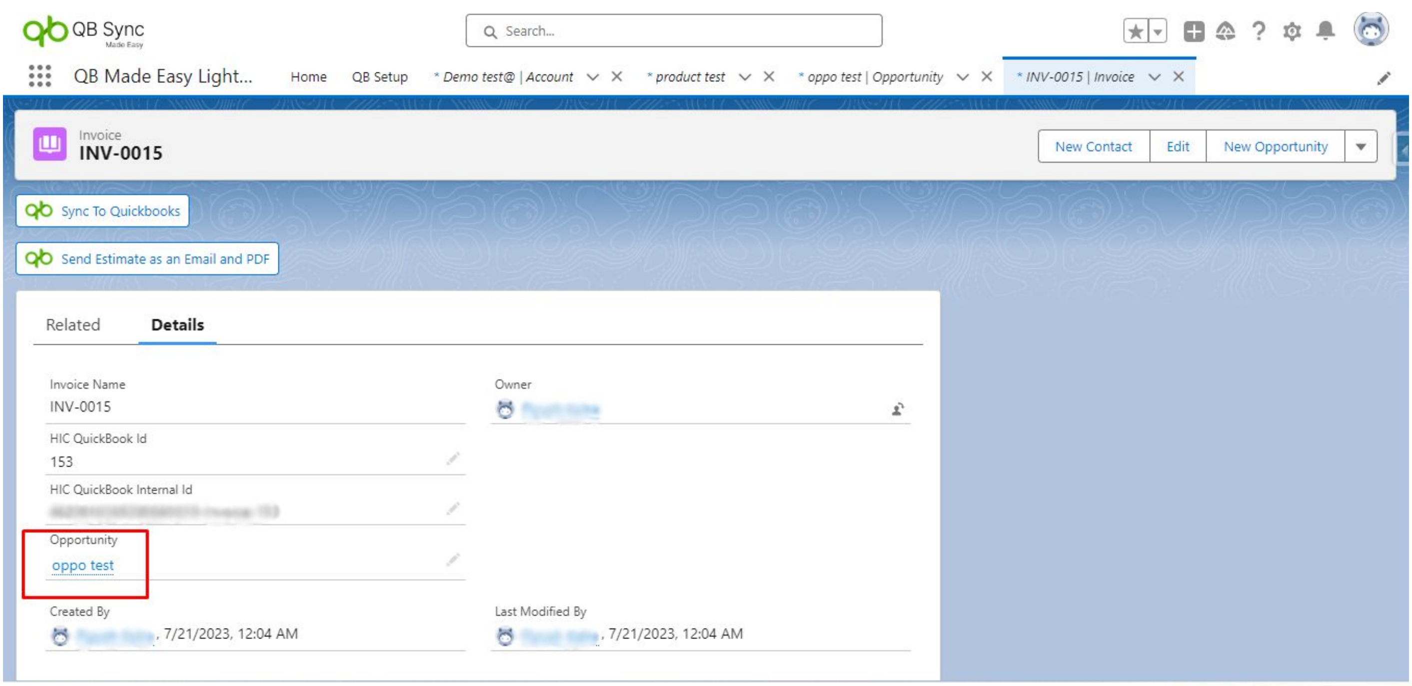

Gmail
Search in mail
Active
Compose
Mail
Chat
Spaces
Meet
Inbox 28
Starred
Snoozed
Sent
Drafts
More
Labels
1 of 853
------------------------ Estimate Summary ------------------------
Estimate # : 1002
Estimate Date: 07/20/2023
Total: $46.00
The complete version has been provided as an attachment to this email.
One attachment • Scanned by Gmail
Estimate_1002_fr...
Reply
Forward

- ## 4.5 Convert Estimate to Invoice From Salesforce.

First, we have to add the button and click Then your Invoice has Created.

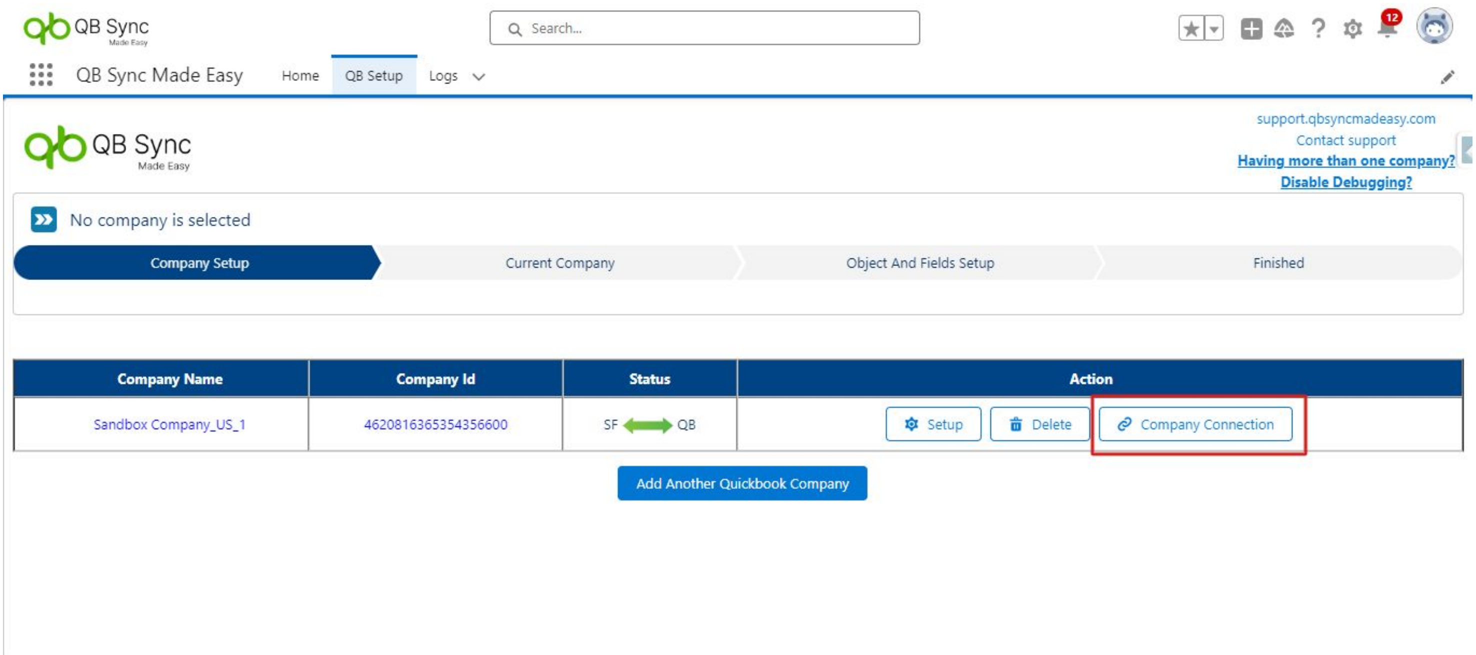


Step 29: Now Go to the App launcher and Search for the Invoice then you have to See your Invoice.

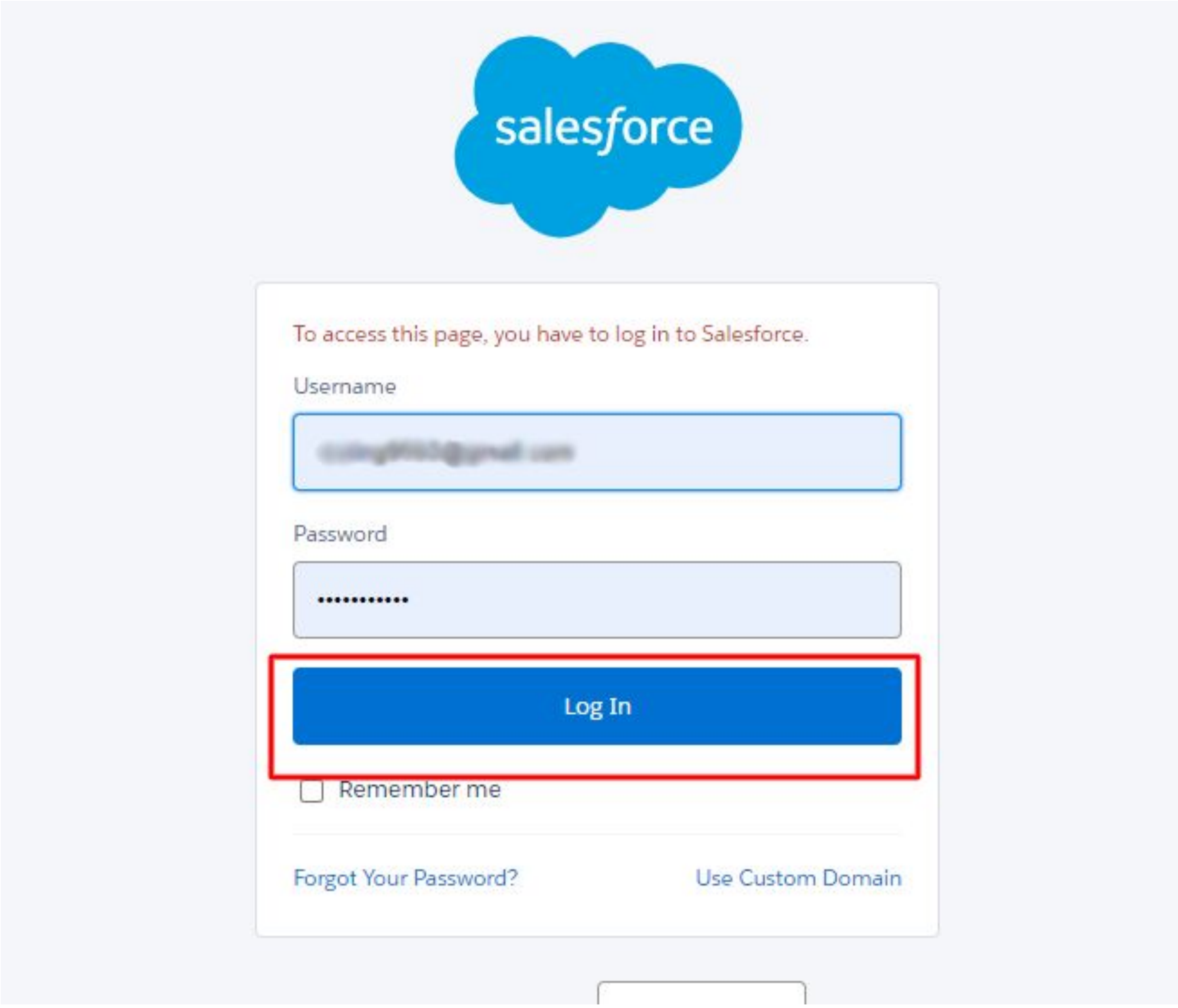


5. quickbooks To Salesforce Real-time Sync.

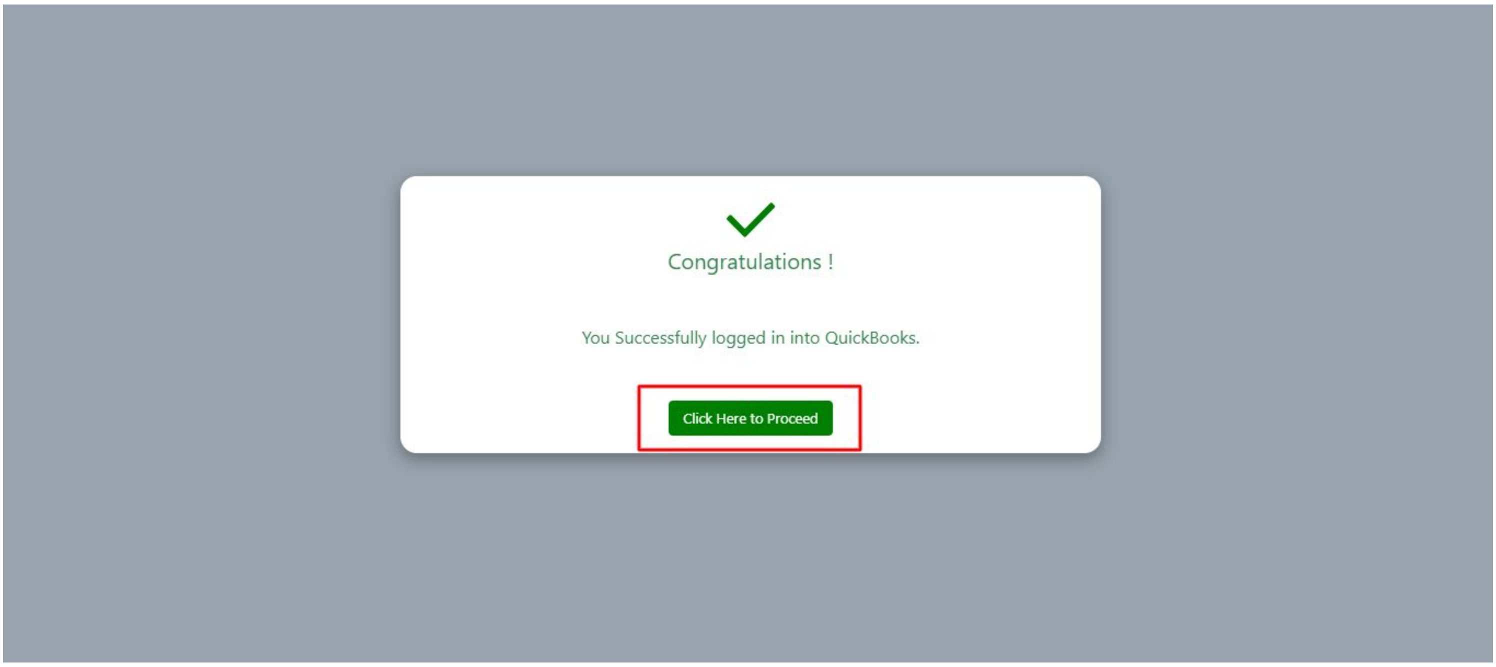
Step 30: Go to the **QBSetup** and add a company if it is not added. After adding a company click on the Company connection.



Step 31: Then, you have to log in to the same **Salesforce Account** that you want to connect to.

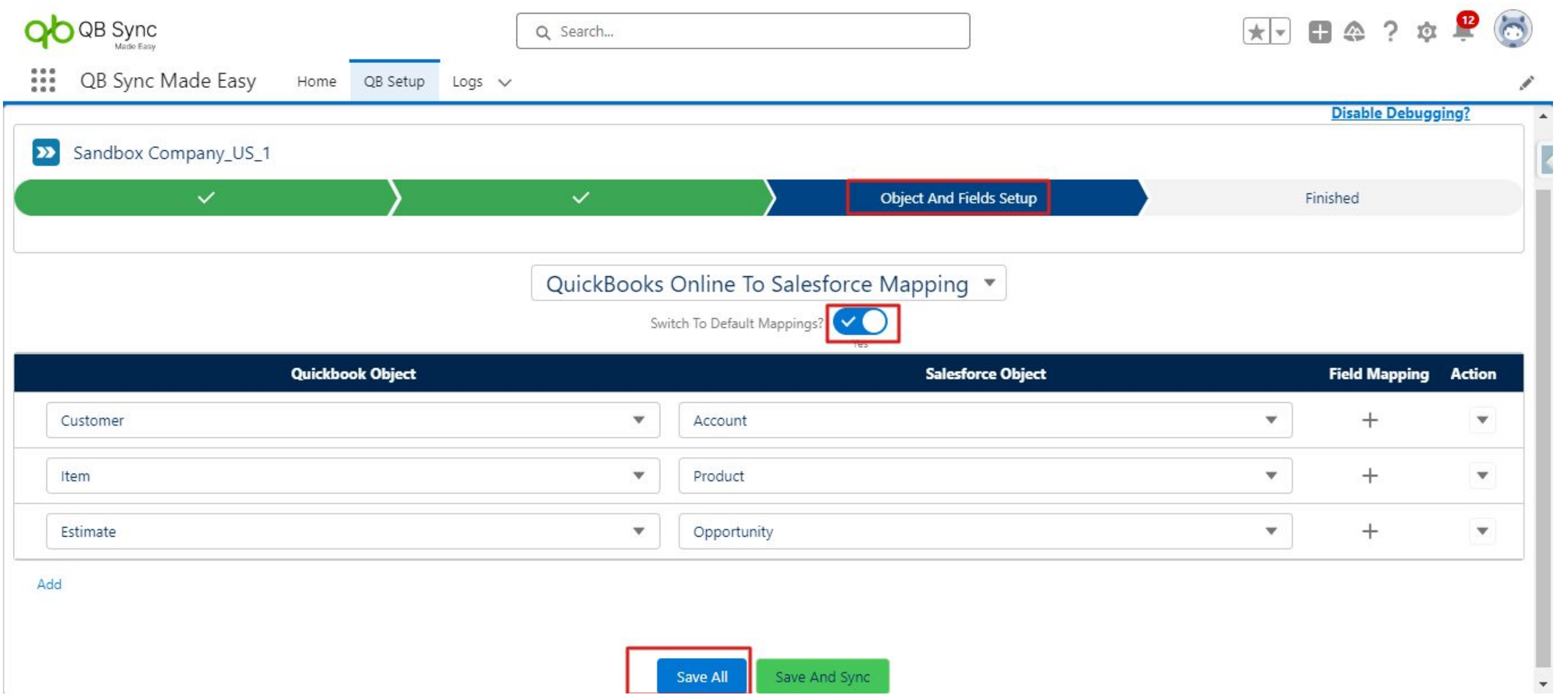


- **Step 32:** You have to log in to the Salesforce Account then you will see the Message that the company has successfully connected. Then you click on the **Click here to Proceed** Button.

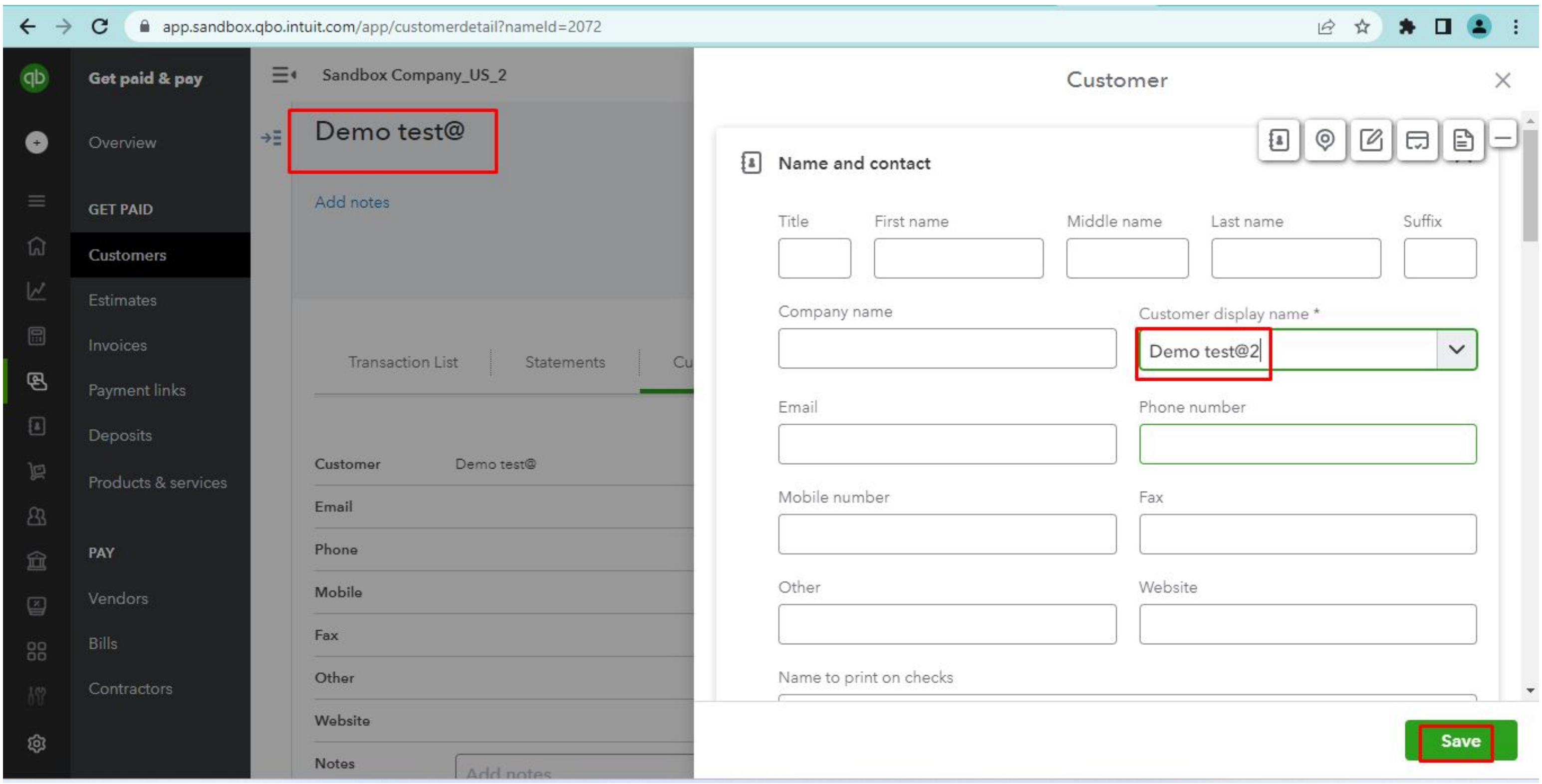


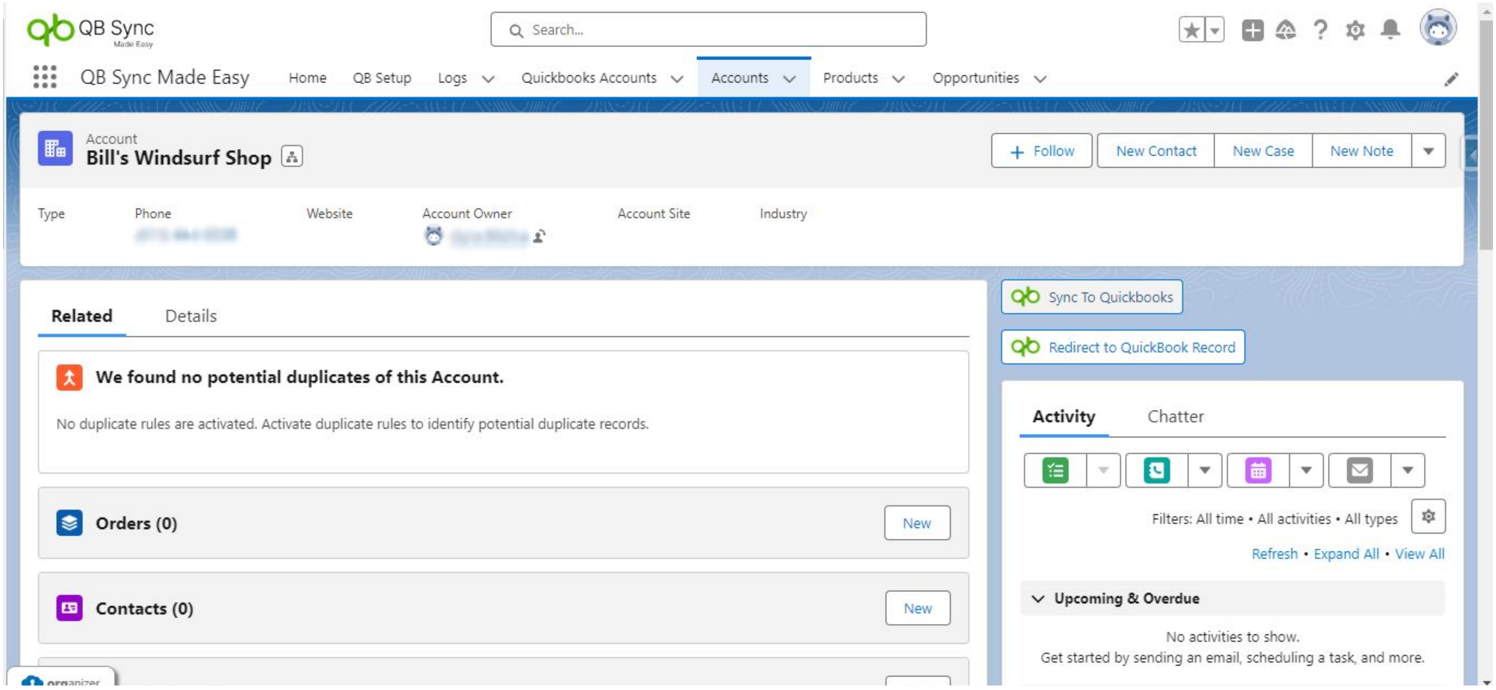
- **Step 33: Mappings**

Go to Objects and field setup and then Configure the quickbooks online to Salesforce mapping according to need and click on the SaveAll.



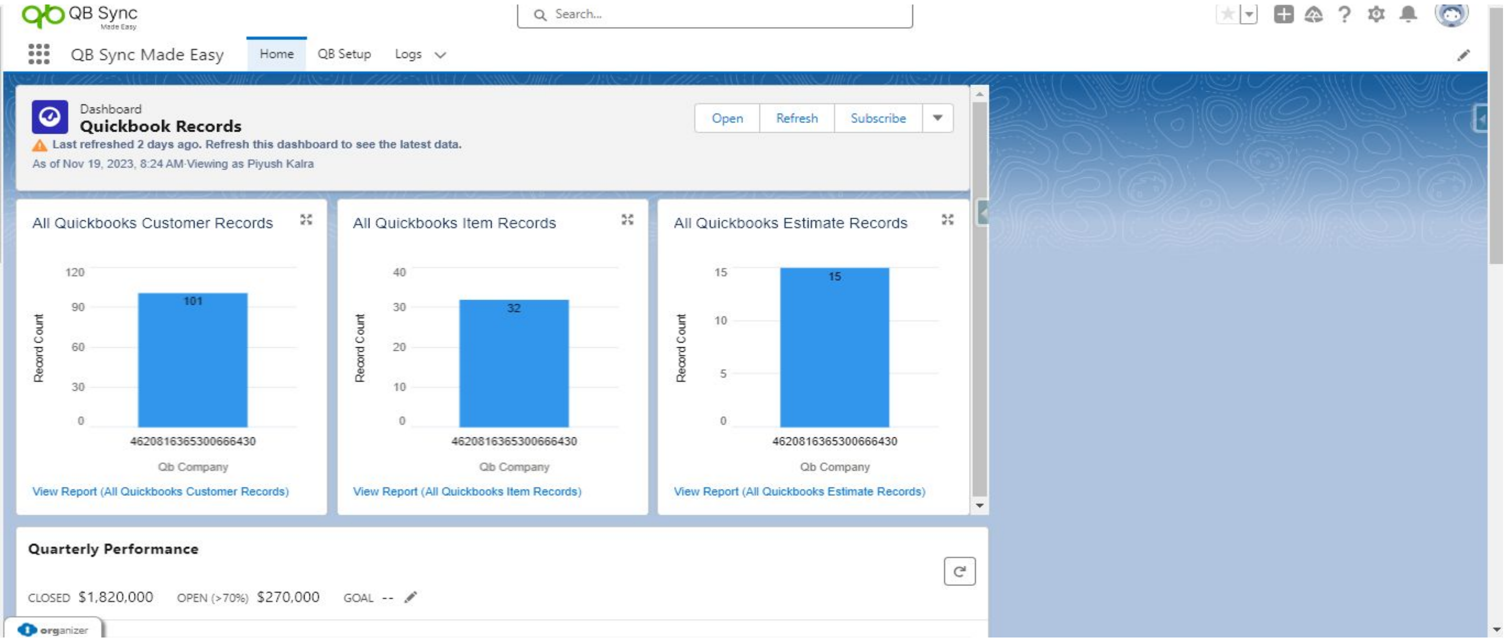
- **Step 34:** Now just create a Record in the quickbooks and Check in the Salesforce.



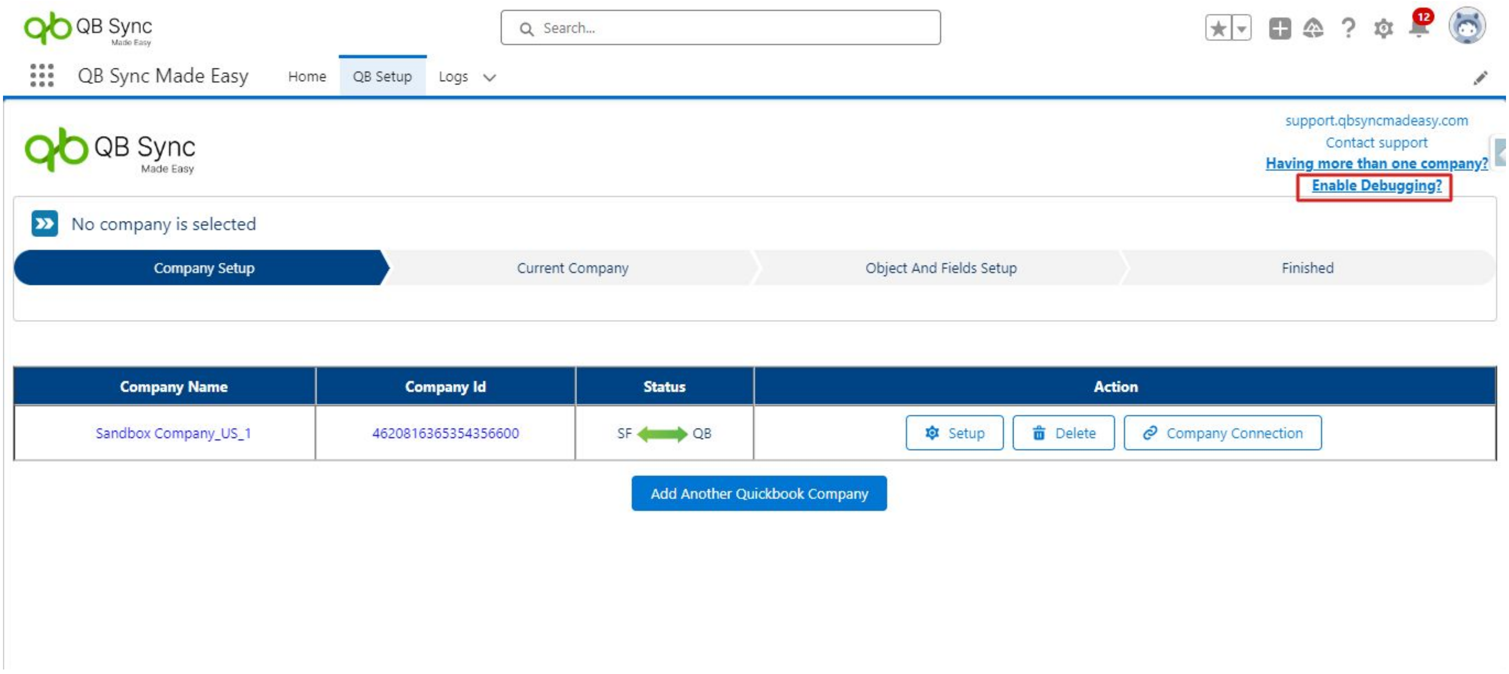


Dashboard:

We can also create reports and dashboards in salesforce to see how many quickbooks records have been created in our salesforce.We can show them based on their quickbooks company id.

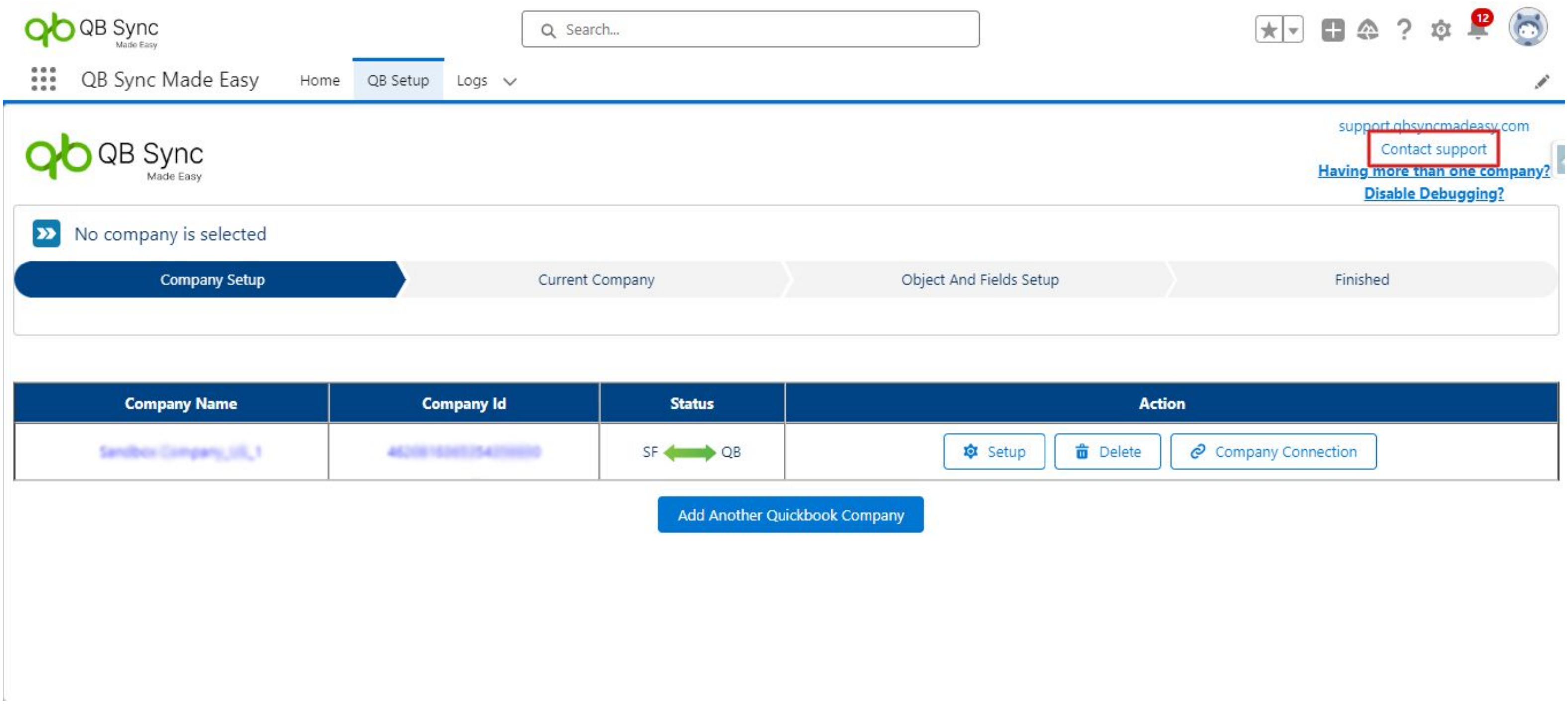


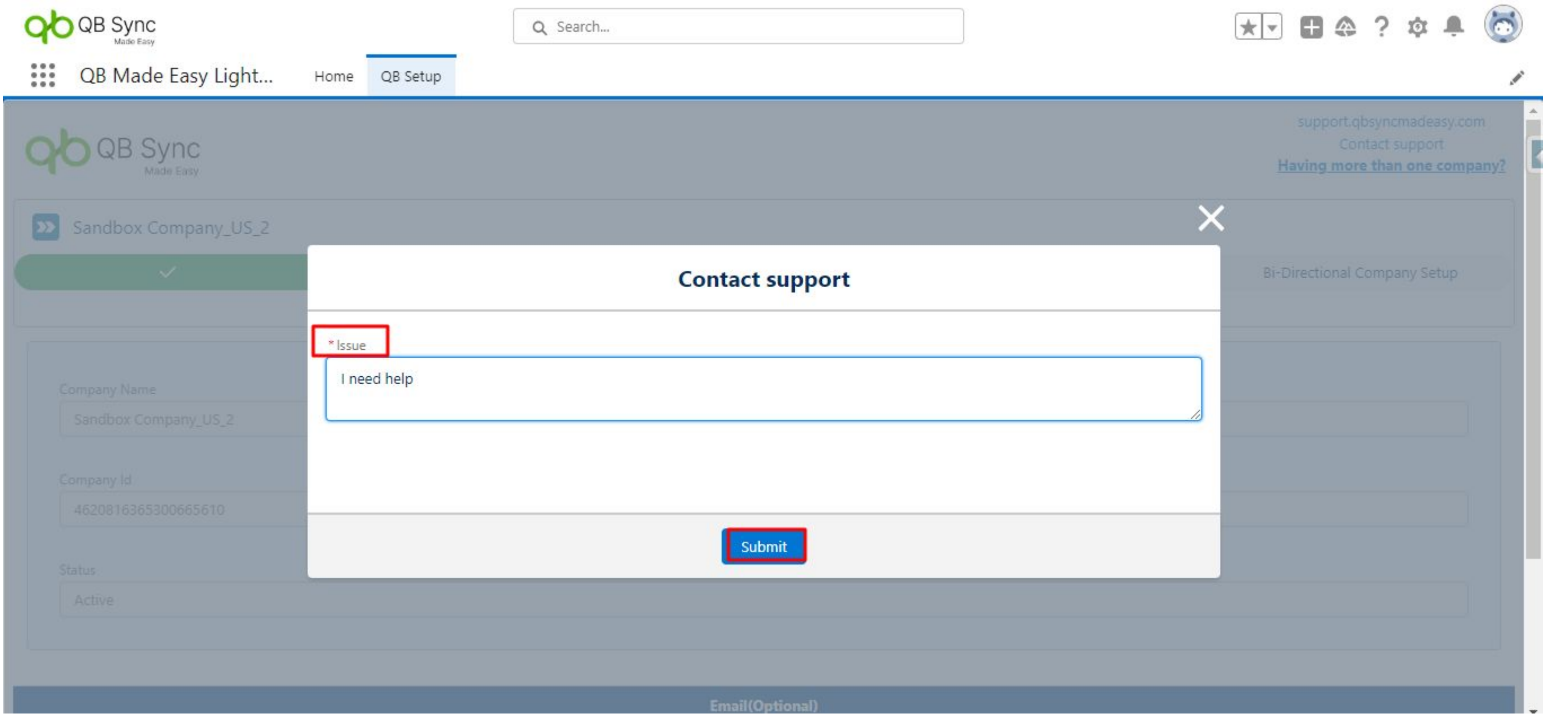
Facing any Problem you can enable the Debugging logs:

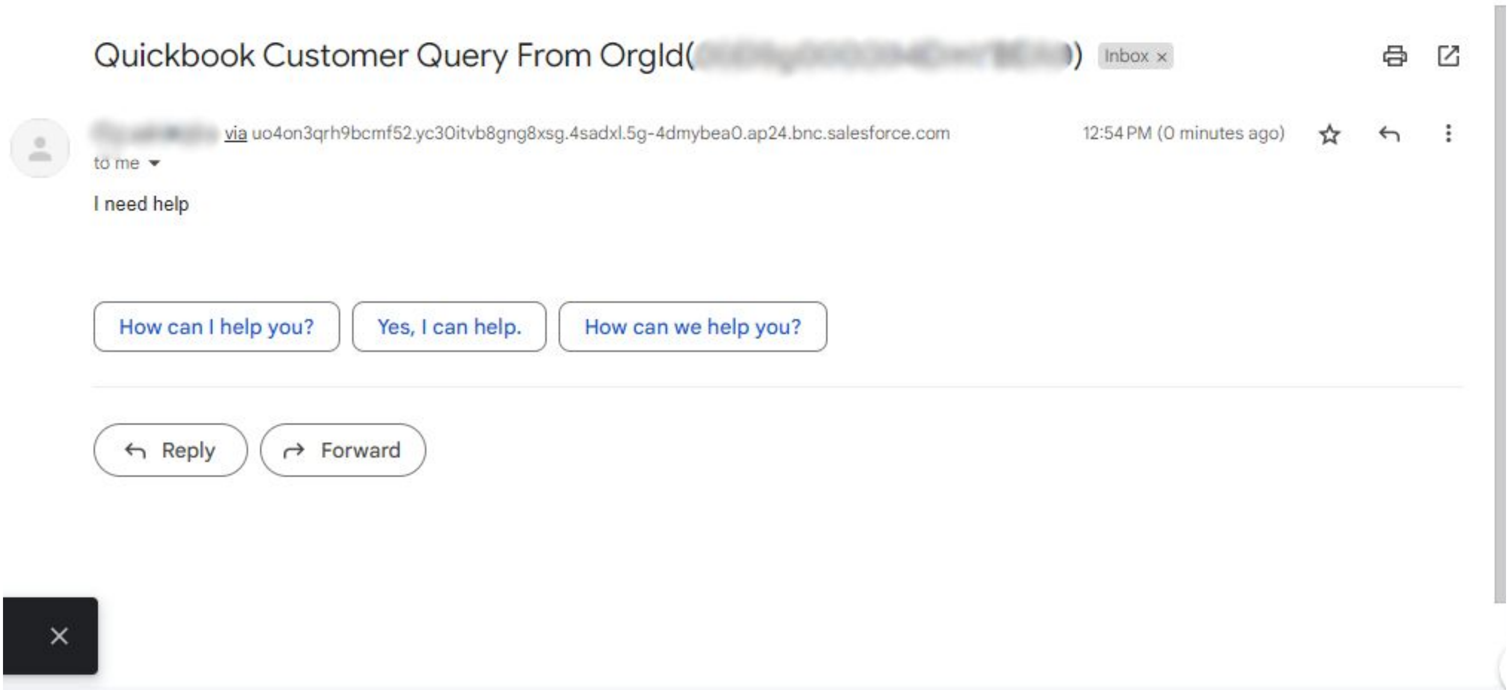


Contact Support:

If a user is stuck somewhere using our app,Then he can click on the Contact support link on our app and then can write the issues that he is facing. we will then contact them later.




QB Sync
Search...
QB Made Easy Light...
Home
QB Setup
support.qbsyncmadeasy.com
Contact support
Having more than one company?
Sandbox Company_US_2
Bi-Directional Company Setup
Company Name
Sandbox Company_US_2
Company Id
4620816365300665610
Status
Active
Contact support
* Issue
I need help
Submit
Email(Optional)


Quickbook Customer Query From OrgId( )
Inbox ×
via uo4on3qrh9bcmf52.yc30itvb8gng8xsg.4sadxl.5g-4dmybea0.ap24.bnc.salesforce.com
12:54 PM (0 minutes ago)
to me
I need help
How can I help you?
Yes, I can help.
How can we help you?
Reply
Forward

HIC GLOBAL SOLUTIONS
Your CRM Success Partners

QB Sync
Made Easy