



HIC GLOBAL SOLUTIONS
Your CRM Success Partners

qb 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 quickbooks and Salesforce CRM.

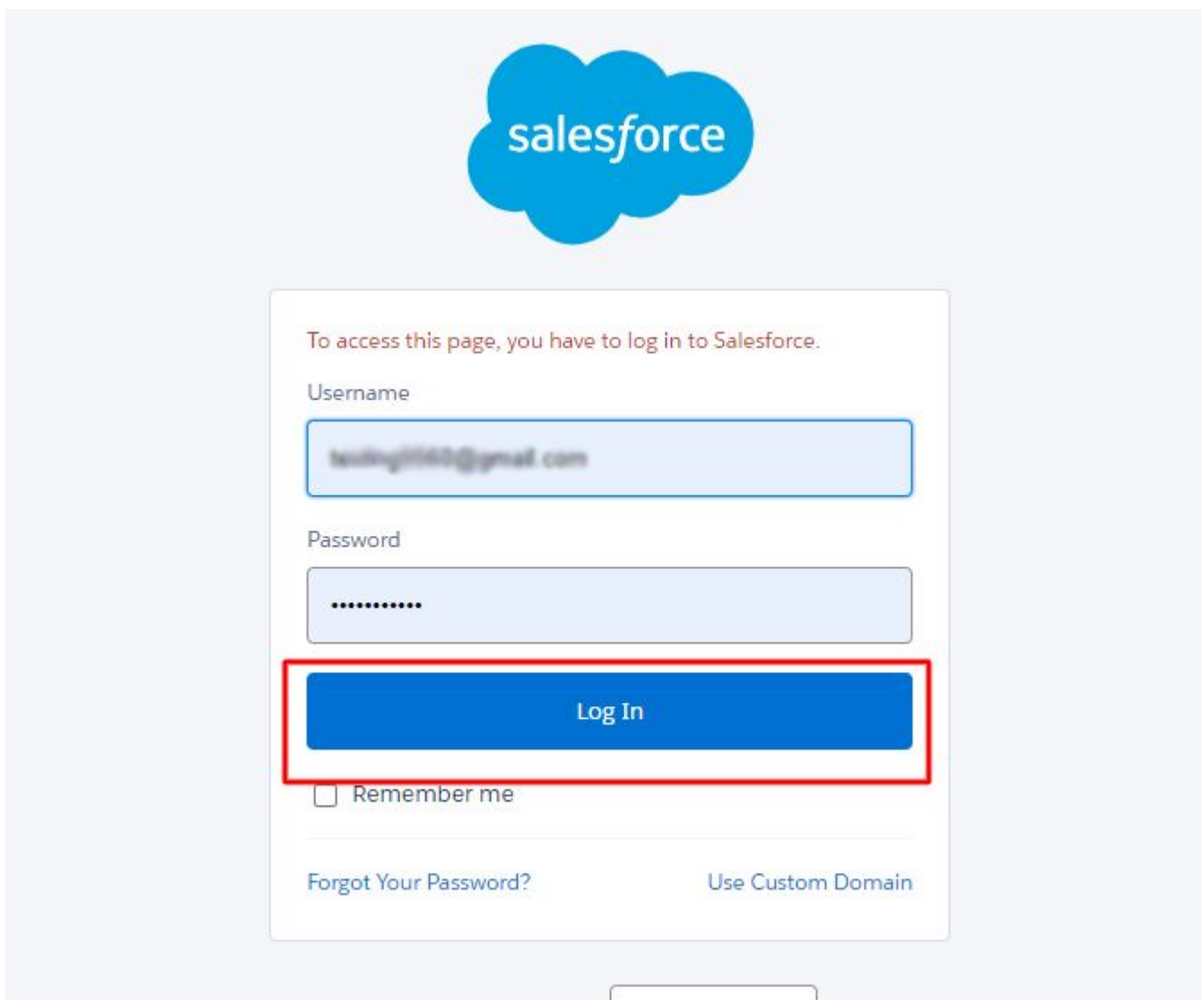
- **Real-time Sync:** Keep your quickbooks and other platforms up-to-date with synchronized data in real time.
- **Bi-Directional Sync:** Enable data flow between quickbooks and your systems in both directions, ensuring consistency.
- **Historical QB Data Sync in Salesforce:** Easily import historical 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.

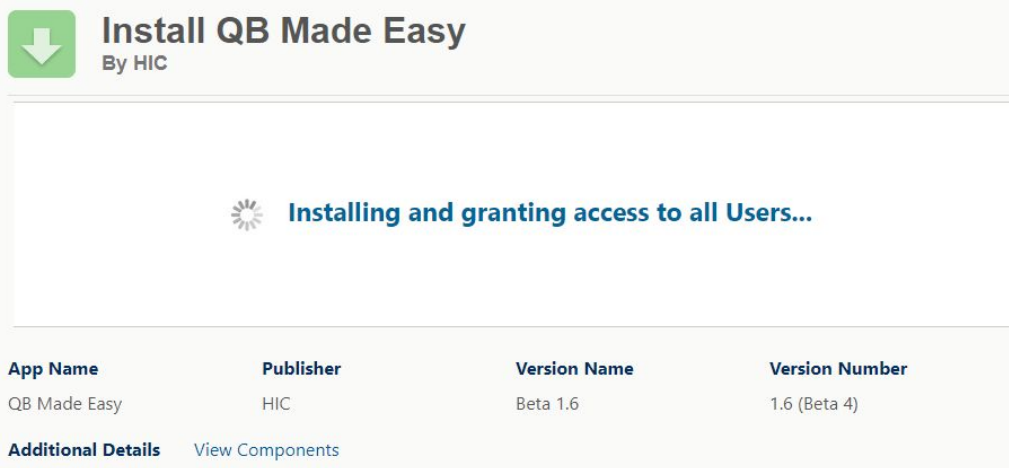
1. Installation and Permission

- Step 1: Login to Salesforce from your account.



The image shows the Salesforce login interface. At the top center is the Salesforce logo, which consists of a blue cloud shape with the word "salesforce" in white lowercase letters. Below the logo is a white login form with a light gray border. The form contains the following elements: a message "To access this page, you have to log in to Salesforce." in red text; a "Username" label above a text input field containing "testing123@gmail.com"; a "Password" label above a password input field with masked characters "*****"; a blue "Log In" button with white text, which is highlighted with a red rectangular border; a "Remember me" checkbox with the text "Remember me" to its right; and two links at the bottom: "Forgot Your Password?" on the left and "Use Custom Domain" on the right.

- **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.



The screenshot shows the Salesforce app installation interface. At the top, there is a green download icon and the text "Install QB Made Easy By HIC". Below this is a large white box with a loading spinner and the text "Installing and granting access to all Users...". At the bottom, there is a table with the following data:

App Name	Publisher	Version Name	Version Number
QB Made Easy	HIC	Beta 1.6	1.6 (Beta 4)

Below the table, there are two links: "Additional Details" and "View Components".

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

The screenshot shows the Salesforce Setup interface. At the top, there is a search bar labeled "Search Setup" and navigation tabs for "Setup", "Home", and "Object Manager". A left-hand navigation menu includes items like "Setup Home", "Service Setup Assistant", "Multi-Factor Authentication Assistant", "Hyperforce Assistant", "Release Updates", "Lightning Experience Transition Assistant", "Salesforce Mobile App", "Lightning Usage", "Optimizer", and "ADMINISTRATION" with sub-items "Users" and "Data".

The main content area is titled "Installed Packages" under the "SETUP" header. It contains introductory text about AppExchange packages and a table of installed packages. The table has columns for Action, Package Name, Publisher, Version Number, Namespace Prefix, Install Date, Limits, Apps, Tabs, Objects, and AppExchange Ready. One package, "QB Made Easy", is listed with a red box around its name. Below the table is a section for "Uninstalled Packages" which is currently empty.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
Uninstall Configure	QB Made Easy	HIC	1.6 (Beta 4)	hic_qbmadeasy	26/06/2023, 6:02 pm	✓	1	4	6	Passed

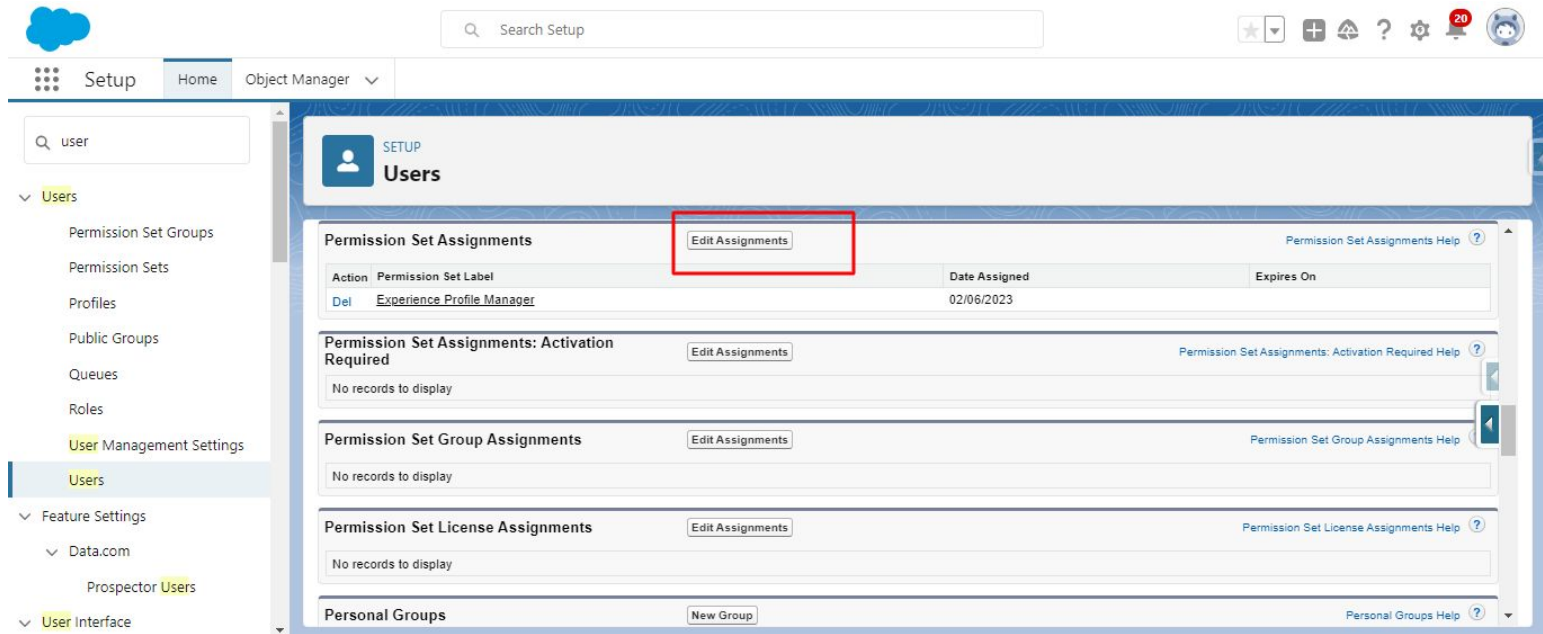
- **Step4:** After installing the **QB Sync Made Easy** app, the **Home** page will appear as shown and search the **Users**.

The screenshot shows the Salesforce Setup interface. In the top navigation bar, there is a search bar with the text "Search Setup". Below it, the main navigation menu includes "Setup", "Home", and "Object Manager". On the left sidebar, a search box contains the text "user", and the "Users" link is highlighted with a red box. The main content area is titled "Installed Packages" and shows a table with one entry: "QB Made Easy" by publisher "HIC", version "1.6 (Beta 4)", installed on "26/06/2023, 6:02 pm". The table columns include Action, Package Name, Publisher, Version Number, Namespace Prefix, Install Date, Limits, Apps, Tabs, Objects, and AppExchange Ready.

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

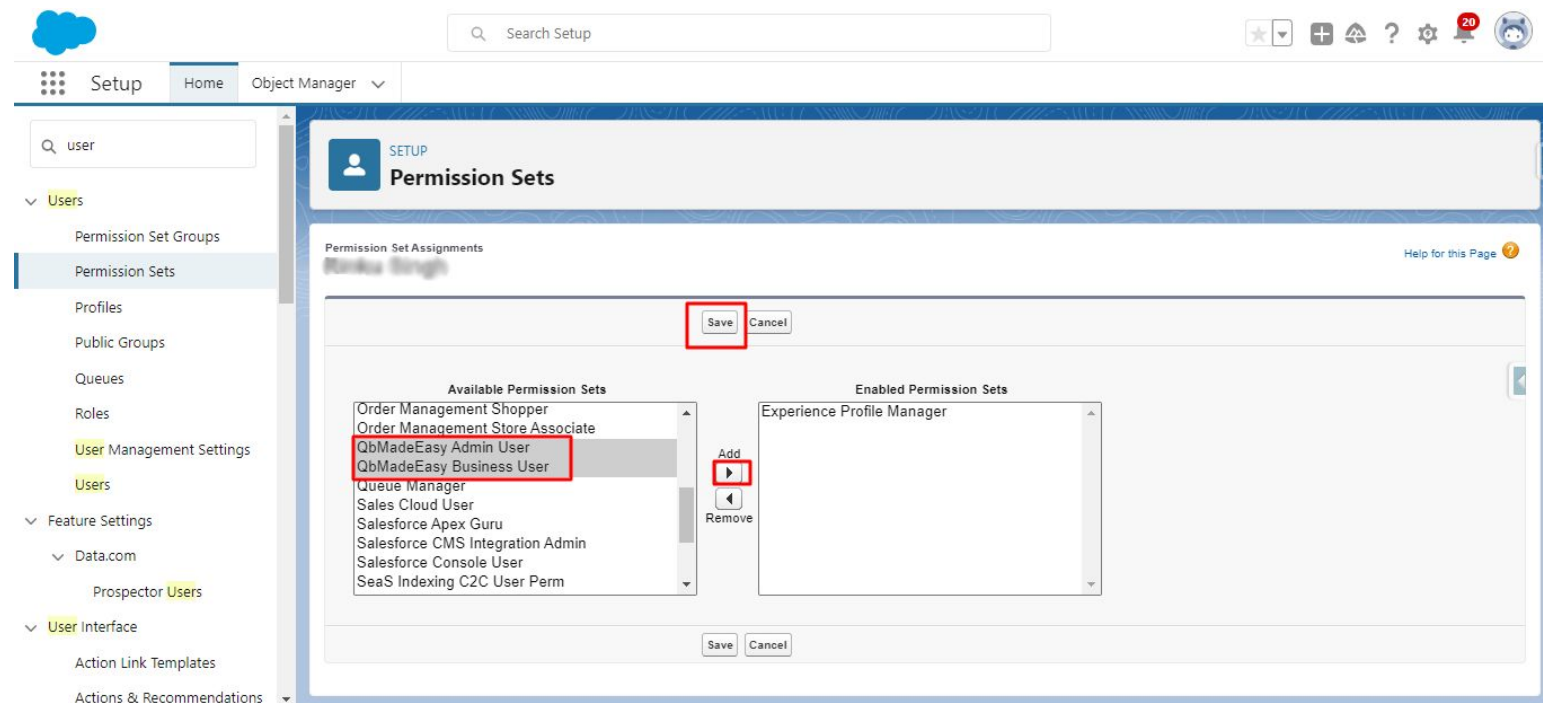
The screenshot shows the Salesforce Setup interface for the "Users" page. The left sidebar has a search box with "Quick Find" and a list of navigation options. The "Users" link is highlighted with a red box. The main content area is titled "All Users" and shows a list of users. The table columns are: Action, Full Name, Alias, Username, Role, Active, and Profile. The first user listed is "Chatter User" with role "Chatter Free User". The second user is "Admin User" with role "System Administrator". The third user is "User Integration" with role "Analytics Cloud Integration User". The fourth user is "User Security" with role "Analytics Cloud Security User".

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



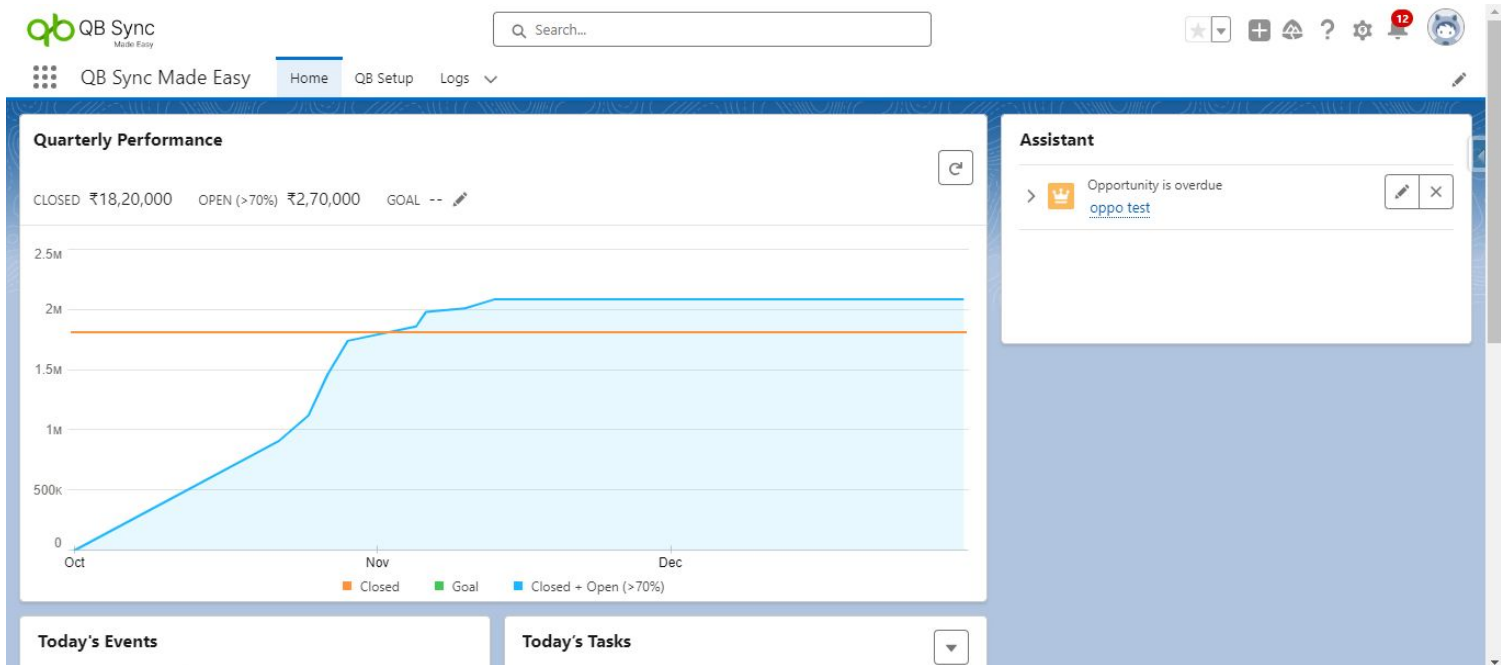
The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains a navigation menu with 'Users' selected. The main content area is titled 'Users' and contains several sections: 'Permission Set Assignments', 'Permission Set Assignments: Activation Required', 'Permission Set Group Assignments', 'Permission Set License Assignments', and 'Personal Groups'. The 'Permission Set Assignments' section is highlighted with a red box around the 'Edit Assignments' button. Below it, a table shows one assignment for the 'Experience Profile Manager' permission set, assigned on 02/06/2023.

Action	Permission Set Label	Date Assigned	Expires On
Del	Experience Profile Manager	02/06/2023	



The screenshot shows the Salesforce Setup interface for the 'Permission Sets' section. The left sidebar contains a navigation menu with 'Permission Sets' selected. The main content area is titled 'Permission Sets' and contains a 'Permission Set Assignments' section. Below this, there are two columns: 'Available Permission Sets' and 'Enabled Permission Sets'. The 'Available Permission Sets' column lists various permission sets, with 'QbMadeEasy Admin User' and 'QbMadeEasy Business User' highlighted with a red box. The 'Enabled Permission Sets' column shows 'Experience Profile Manager'. The 'Add' button between the columns is also highlighted with a red box. At the top of the main content area, there are 'Save' and 'Cancel' buttons, with the 'Save' button highlighted with a red box.

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

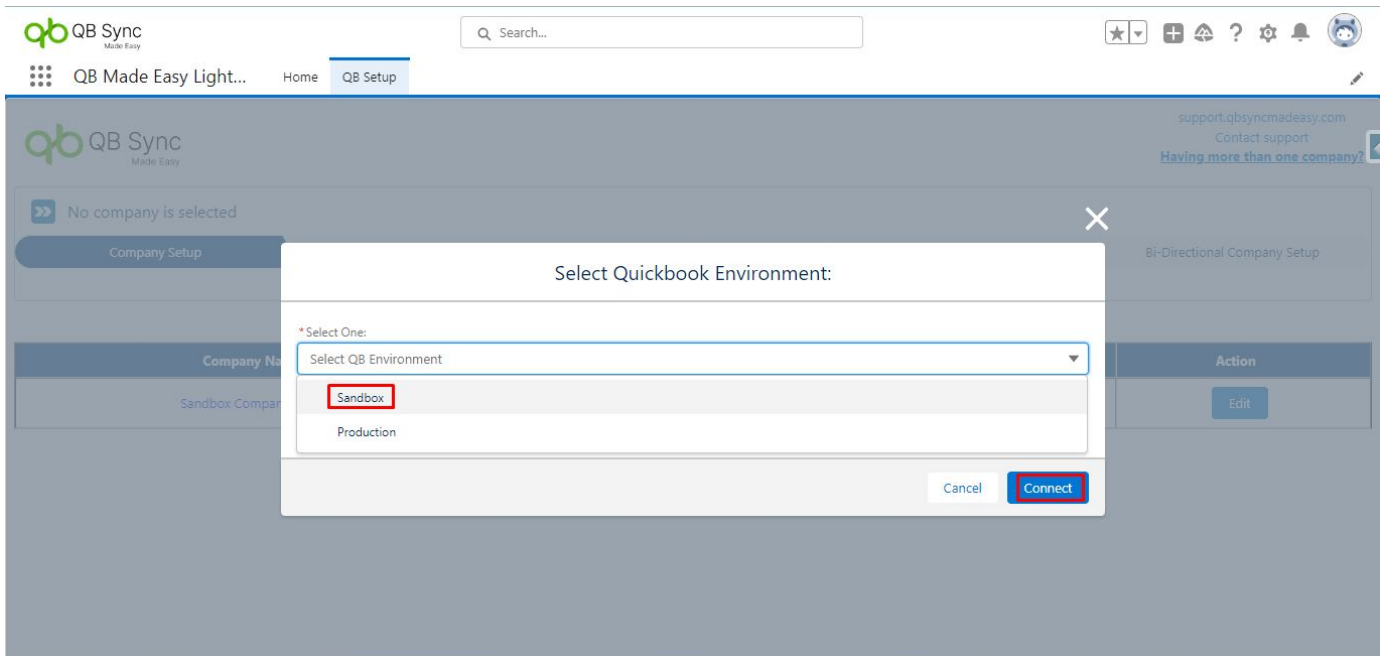


- **1.1. Connect quickbooks Companies in Salesforce**

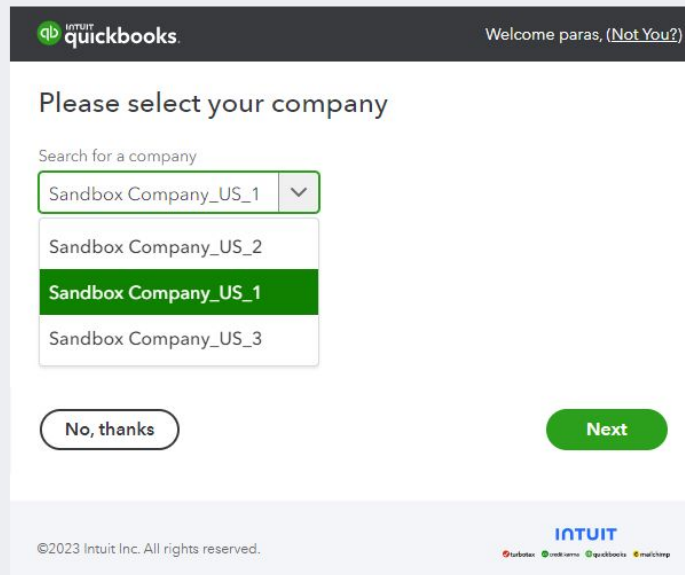
- **Step8:** After clicking on the **QB Set up** page click on the **Connect with quickbooks online.**

The screenshot displays the QB Sync application interface. At the top left, the logo 'qb QB Sync Made Easy' is visible. A search bar is located at the top center. The navigation menu includes 'Home', 'QB Setup' (highlighted with a red box), and 'Logs'. On the right side, there are icons for a star, a plus sign, a trash can, a question mark, a gear, a notification bell with '12', and a user profile icon. Below the navigation bar, the text 'support.qbsyncmadeeasy.com' and 'Contact support' are shown, along with links for 'Having more than one company?' and 'Disable Debugging?'. A progress bar indicates the current step: 'Company Setup' (active), followed by 'Current Company', 'Object And Fields Setup', and 'Finished'. Below the progress bar, a table with the following columns is visible: 'Company Name', 'Company Id', 'Status', and 'Action'. A blue button labeled 'Add Another Quickbook Company' is positioned below the table.

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

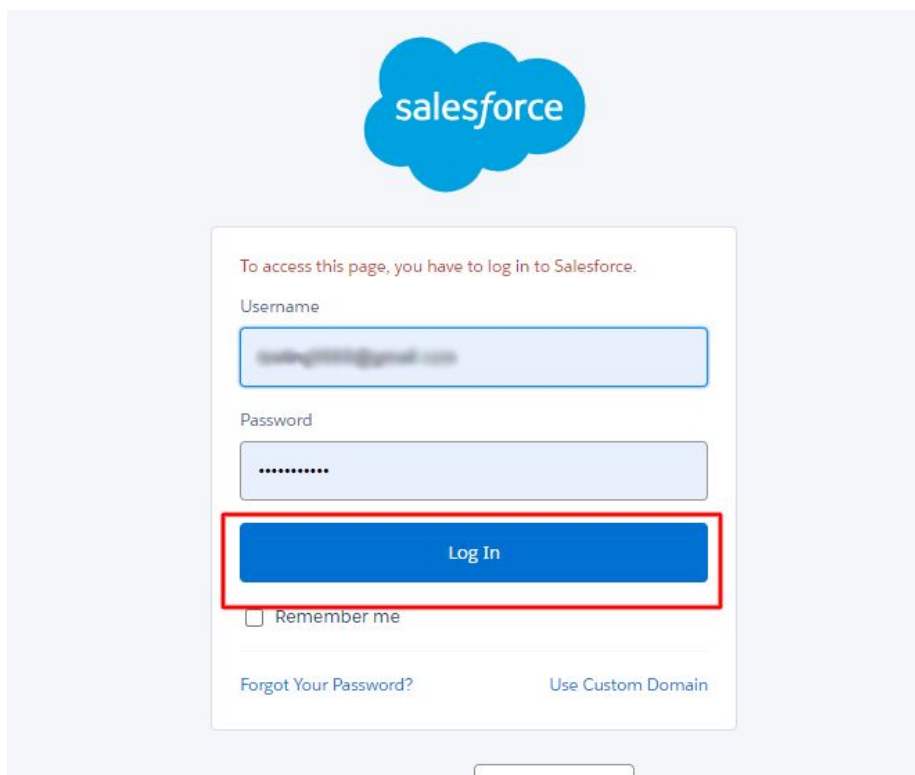


Step 10: After that select the Company and then click on the next tab.



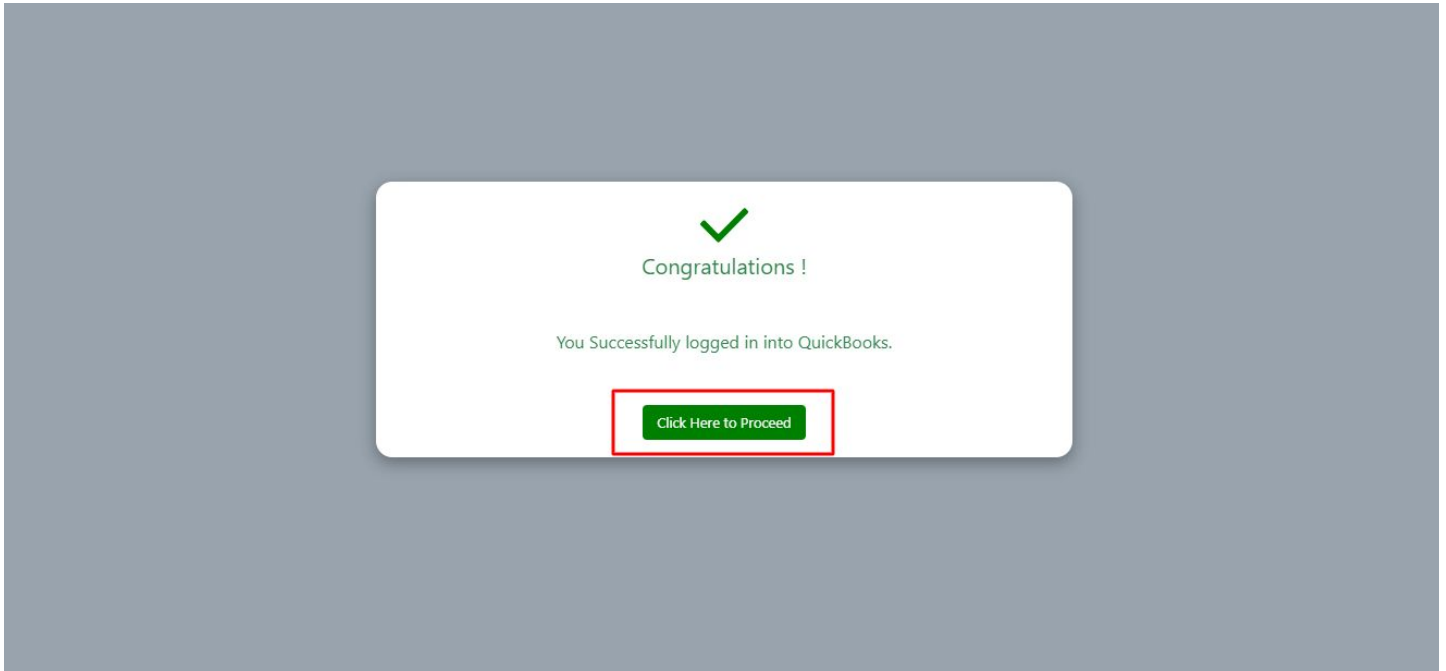
The screenshot shows the Intuit QuickBooks login interface. At the top, there is a dark header with the Intuit QuickBooks logo on the left and the text "Welcome paras, (Not You?)" on the right. Below the header, the main content area is white and contains the heading "Please select your company". Underneath this heading is a search prompt "Search for a company" followed by a dropdown menu. The dropdown menu is open, showing four options: "Sandbox Company_US_1", "Sandbox Company_US_2", "Sandbox Company_US_1", and "Sandbox Company_US_3". The first option, "Sandbox Company_US_1", is highlighted with a green background. Below the dropdown menu are two buttons: "No, thanks" on the left and "Next" on the right. At the bottom of the page, there is a copyright notice "©2023 Intuit Inc. All rights reserved." on the left and the Intuit logo with social media icons on the right.

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

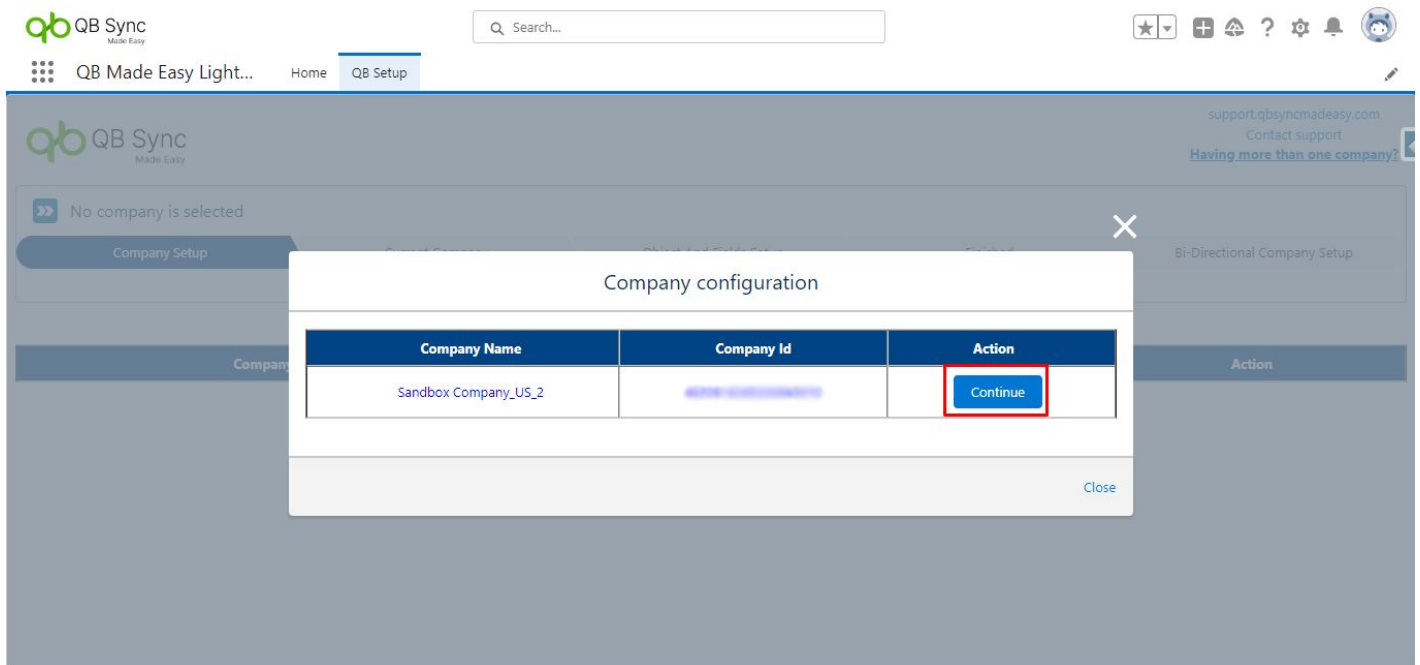


The screenshot shows the Salesforce login page. At the top, there is the Salesforce logo, which is a blue cloud shape with the word "salesforce" inside. Below the logo, there is a white box containing the text "To access this page, you have to log in to Salesforce." followed by a "Username" label and a text input field containing "test@gmail.com". Below the username field is a "Password" label and a password input field with masked characters ".....". Below the password field is a blue "Log In" button, which is highlighted with a red rectangular border. Below the "Log In" button is a checkbox labeled "Remember me" which is currently unchecked. At the bottom of the white box, there are two links: "Forgot Your Password?" on the left and "Use Custom Domain" on the right.

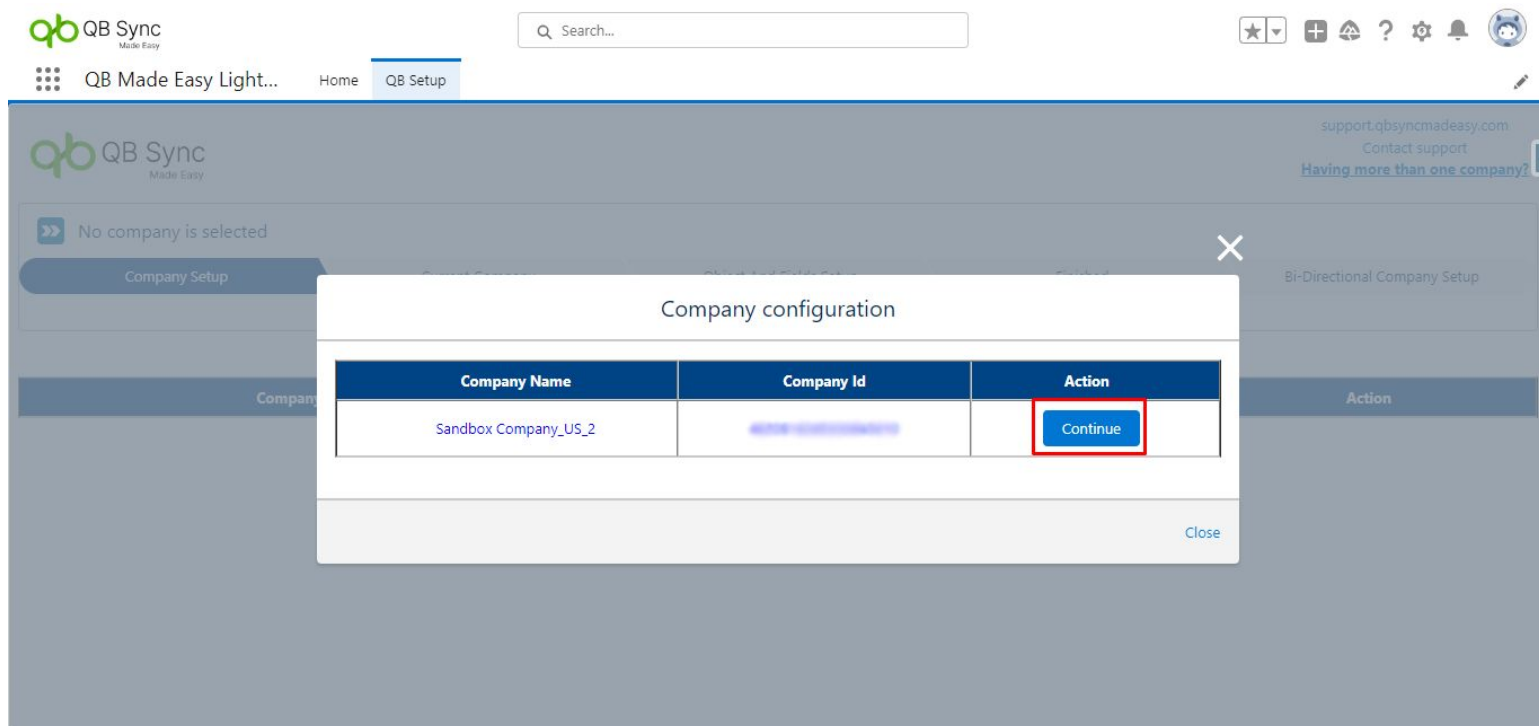
- **Step12:** You have to log in to the Salesforce Account then you will see the Message that the company has successfully connected. Then you click on the click here to Proceed Button.



- **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.

qb QB Sync Made Easy

Search...

Home QB Setup Logs

support.qbsyncmadeasy.com
Contact support
Having more than one company?
Disable Debugging?

Sandbox Company_US_1

Company Setup Current Company Object And Fields Setup Finished

Company Name	Company Id	Status	Action
Sandbox Company_US_1		SF → QB	Setup Delete Company Connection

Add Another Quickbook Company

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.

qb QB Sync Made Easy

Search...

Home QB Setup Logs

support.qbsyncmadeasy.com
Contact support
Having more than one company?
Disable Debugging?

No company is selected

Company Setup

Company Name

Sandbox Company_US_1

Salesforce To QuickBooks QuickBooks To Salesforce (Real-time Sync)

Company Name	Status	Action
Sandbox Company_US_1	Disconnected	Connect



To access this page, you have to log in to Salesforce.

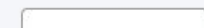
Username

Password

Remember me

[Forgot Your Password?](#)

[Use Custom Domain](#)



Congratulations !

You Successfully logged in into QuickBooks.

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

The screenshot displays the QB Sync Made Easy web application. At the top, there is a search bar and navigation icons. The main header includes the QB Sync logo and navigation links for Home, QB Setup, and Logs. A progress bar indicates the current step is 'Company Setup'. Below this, a table lists the connected companies. The first entry is 'Sandbox Company_US_1' with a company ID of '4620816365354356600'. The status is 'SF ← QB', indicating a bidirectional connection between Salesforce and QuickBooks. Action buttons for 'Setup', 'Delete', and 'Company Connection' are visible for this entry. A button labeled 'Add Another Quickbook Company' is located below the table.

Company Name	Company Id	Status	Action
Sandbox Company_US_1	4620816365354356600	SF ← QB	Setup Delete Company Connection

[Add Another Quickbook Company](#)

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

The screenshot shows the QB Sync interface with a table listing companies. The 'Company Connection' button for 'Sandbox Company_US_1' is highlighted with a red box.

Company Name	Company Id	Status	Action
Sandbox Company_US_1	4620816365354356600	SF ↔ QB	<input type="button" value="Setup"/> <input type="button" value="Delete"/> <input type="button" value="Company Connection"/>

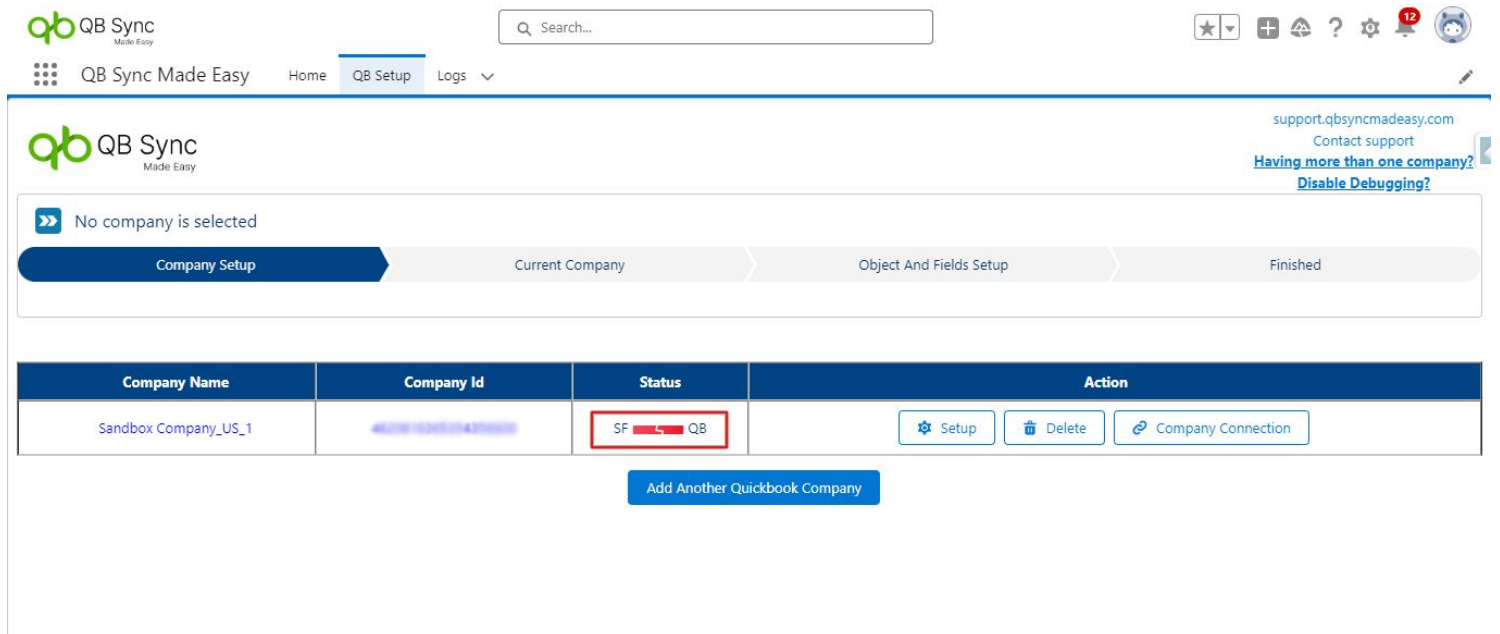
Buttons: Add Another Quickbook Company

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


The screenshot shows a modal window titled 'Salesforce To QuickBooks QuickBooks To Salesforce (Real-time Sync)'. The 'Disconnect' button is highlighted with a red box.

Company Name	Status	Action
Sandbox Company_US_1	Connected	<input type="button" value="Disconnect"/>

Then you can see the company is disconnected.

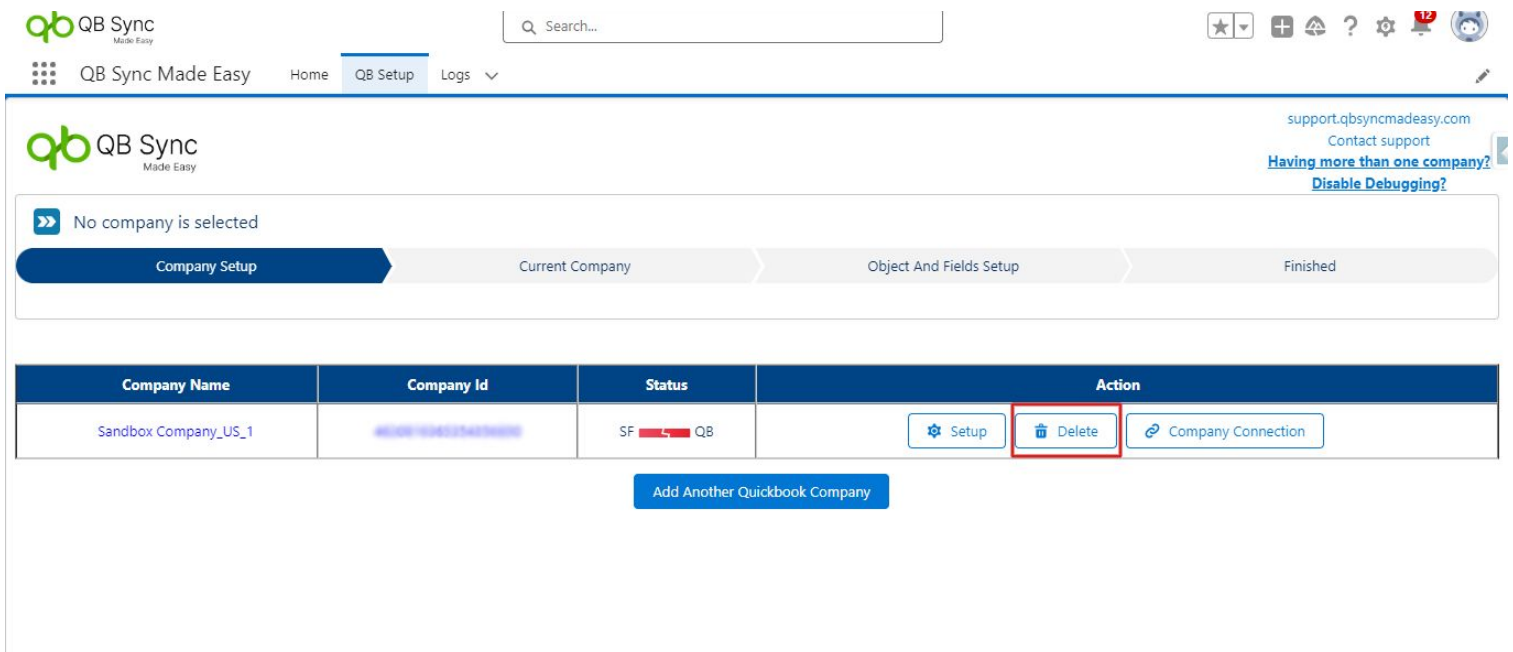


The screenshot shows the QB Sync interface. At the top, there is a search bar and navigation icons. Below the navigation bar, the page title is "QB Sync Made Easy" and the current page is "QB Setup". A message states "No company is selected". A progress bar shows four steps: "Company Setup" (active), "Current Company", "Object And Fields Setup", and "Finished". Below the progress bar is a table with the following data:

Company Name	Company Id	Status	Action
Sandbox Company_US_1	4420871046521543700000	SF  QB	Setup Delete Company Connection

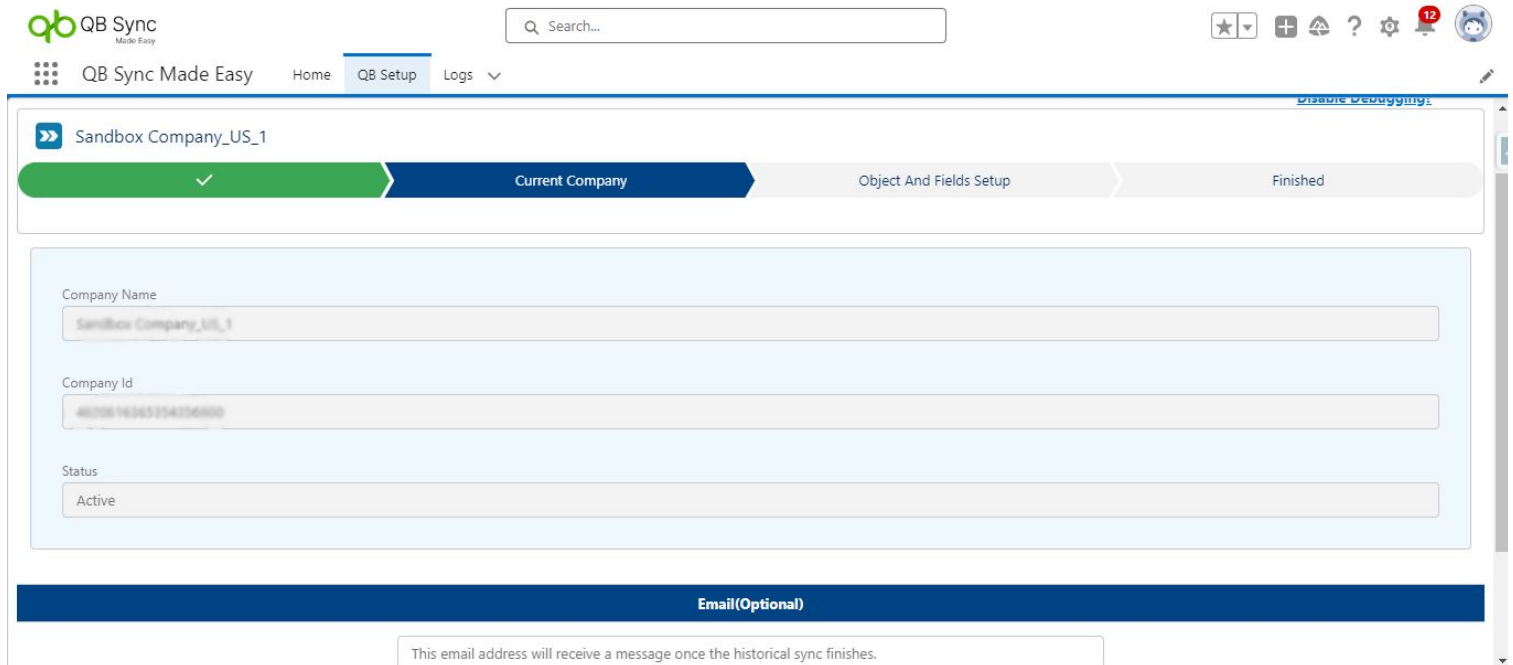
Below the table is a button labeled "Add Another Quickbook Company". In the top right corner, there are links for "support.qbsyncmadeasy.com", "Contact support", "Having more than one company?", and "Disable Debugging?".

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



This screenshot is identical to the previous one, but with a red box highlighting the "Delete" button in the "Action" column of the table. The "Delete" button is represented by a trash can icon.

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.



The screenshot displays the QB Sync web interface. At the top left is the QB Sync logo with the tagline 'Made Easy'. A search bar is located at the top center. The navigation menu includes 'QB Sync Made Easy', 'Home', 'QB Setup', and 'Logs'. The main content area shows a progress bar for 'Sandbox Company_US_1' with four stages: a completed stage (green), 'Current Company' (blue), 'Object And Fields Setup' (grey), and 'Finished' (grey). Below the progress bar, the company details are shown in a light blue box: 'Company Name' is 'Sandbox Company_US_1', 'Company Id' is '462781163452542326400', and 'Status' is 'Active'. A dark blue bar labeled 'Email(Optional)' is positioned below the details. Underneath this bar is a text input field with the placeholder text: 'This email address will receive a message once the historical sync finishes.'

- **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.**

The screenshot displays the QB Sync web application interface. At the top, there is a navigation bar with the QB Sync logo, a search bar, and various utility icons. Below the navigation bar, the main content area shows a progress indicator with four steps: 'Sandbox Company_US_1', two green steps with checkmarks, and 'Object And Fields Setup' (highlighted in blue), followed by 'Finished'. A dropdown menu is open, showing 'QuickBooks Online To Salesforce Mapping' selected. Below the dropdown, there is a table with columns for 'Quickbook Object', 'Object', 'Field Mapping', and 'Action'. The table is currently empty. At the bottom of the page, there are two buttons: 'Save All' and 'Save And 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.

QB Sync
QB Sync Made Easy

Search...

Sandbox Company_US_6

Object And Fields Setup

QuickBooks Online To Salesforce Mapping

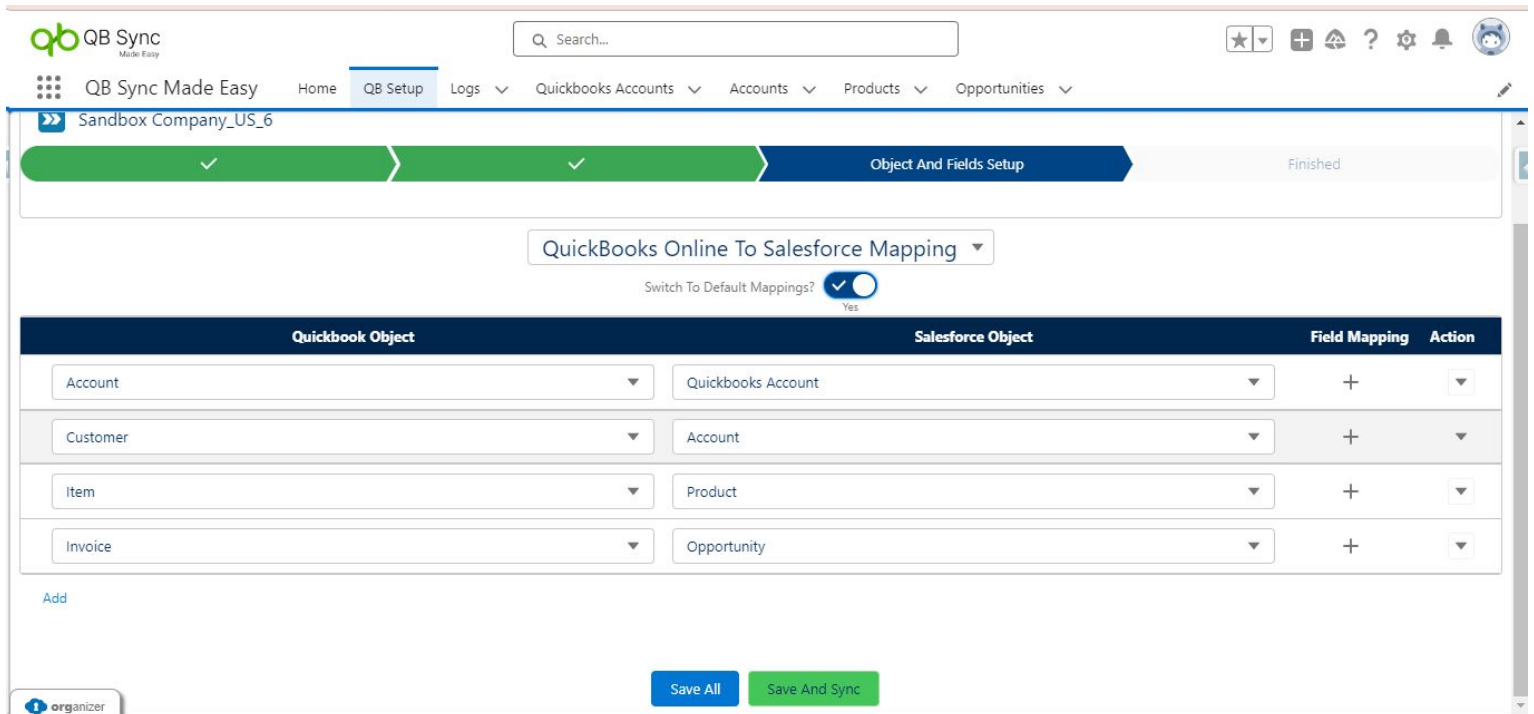
Switch To Default Mappings? Yes

Quickbook Object	Salesforce Object	Field Mapping	Action
Account	Quickbooks Account	+	▼
Customer	Account	+	▼
Item	Product	+	▼
Invoice	Opportunity	+	▼

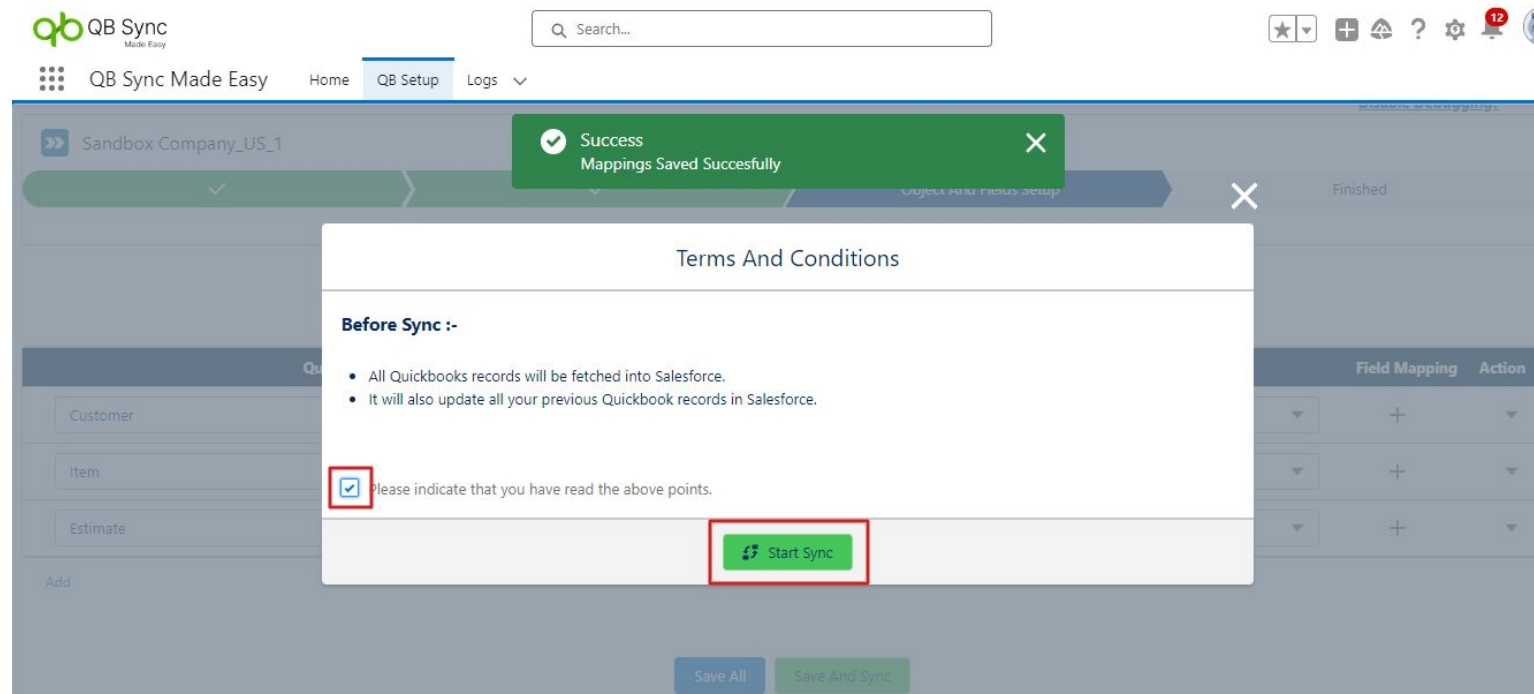
Add

- **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.

The screenshot shows the QB Sync interface for 'Sandbox Company_US_1'. A progress bar at the top is fully green, indicating 100% completion. Below the progress bar, the text 'Historic Sync in Progress' is displayed, with '100% Complete' highlighted in a red box. A message states: 'Great going ! The app is now configured and connected ! We will send you an email at once we finish the background setup. Meanwhile you can - 1. Write a review of our app on appexchange. 2. Watch funny cat video.' Below this, three summary cards are shown: 'FOR ACCOUNT - CUSTOMER' with 16/16 completed, 'FOR PRODUCT2 - ITEM' with 4/4 completed, and 'FOR OPPORTUNITY - ESTIMATE' with 1/1 completed.

- **2.1 Salesforce to quickbooks**

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

The screenshot shows the 'Object And Fields Setup' page in the QB Sync interface. The progress bar at the top is partially green, with the 'Object And Fields Setup' step highlighted in blue. Below the progress bar, the text 'Salesforce To QuickBooks Online Mapping' is displayed, with a dropdown arrow highlighted in a red box. A toggle switch for 'Switch To Default Mappings?' is set to 'No'. At the bottom, there is a table with columns for 'Salesforce Object', 'Quickbook Object', 'Field Mapping', and 'Action'. A 'Save All' button is located below the table.

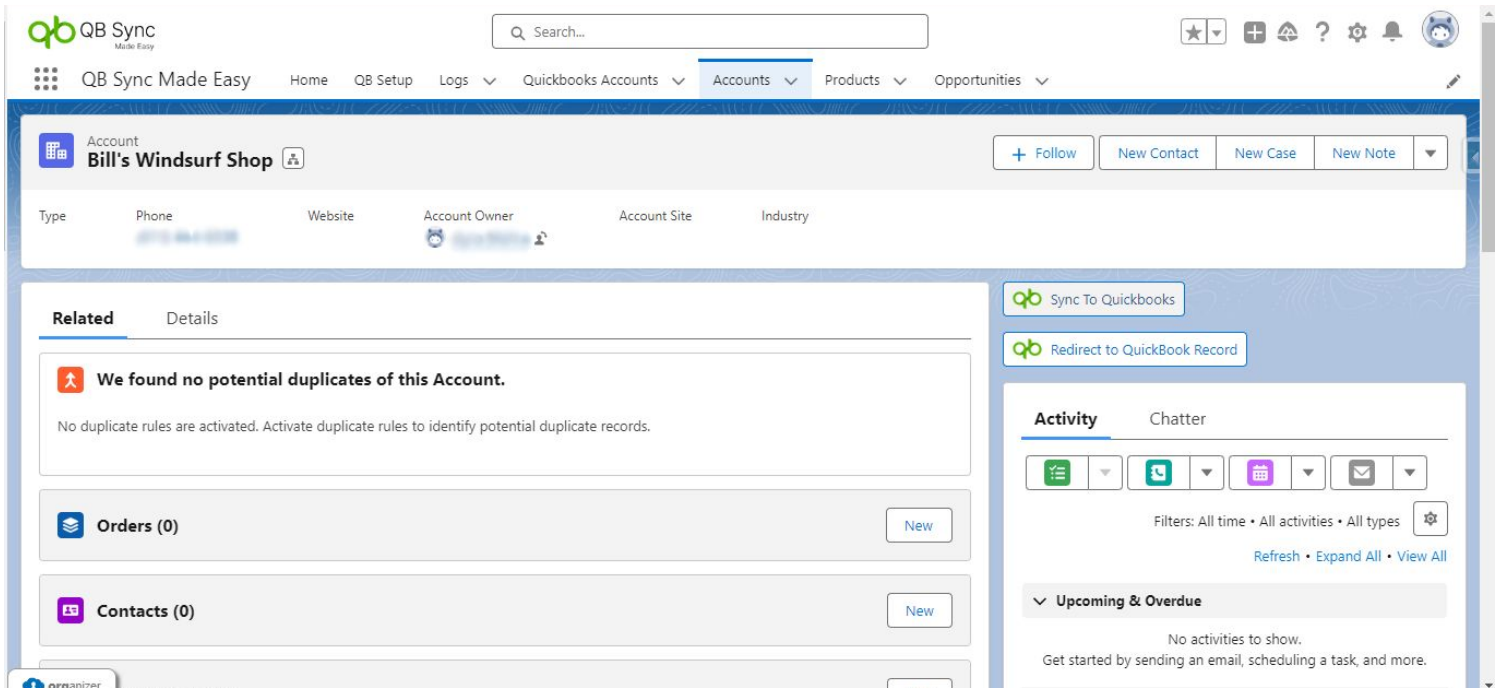
- **Step 22:** Then you can do the Mapping same as above and click on the save button.

The screenshot shows the QB Sync interface with the following details:

- Navigation:** Home, QB Setup, Logs, Quickbooks Accounts, Accounts, Products, Opportunities.
- Current View:** Salesforce Object: Account, Quickbook Object: Customer, Field Mapping.
- Table:**

Is Required?	Data Mapping Type	Quickbook Field	Constant	Salesforce Field	Related Field	Action
Conditional	Field Mapping	Standard : DisplayName (String)	<input type="checkbox"/>	Account Name		
Optional	Field Mapping	Standard : BillAddr.Line1 (String)	<input type="checkbox"/>	Billing Street		
Optional	Field Mapping	Standard : BillAddr.City (String)	<input type="checkbox"/>	Billing City		
Optional	Field Mapping	Standard : BillAddr.Country (String)	<input type="checkbox"/>	Billing Country		
Optional	Field Mapping	Standard : BillAddr.PostalCode (String)	<input type="checkbox"/>	Billing Zip/Postal Code		
Optional	Field Mapping	Standard : ShipAddr.Line1 (String)	<input checked="" type="checkbox"/> Constant	Shipping Street		
Optional	Field Mapping	Standard : ShipAddr.City (String)	<input type="checkbox"/>	Shipping City		
Optional	Field Mapping	Standard : ShipAddr.Country (String)	<input type="checkbox"/>	Shipping Country		
Optional	Field Mapping	Standard : ShipAddr.PostalCode (String)	<input type="checkbox"/>	Shipping Zip/Postal Code		

- **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.

The screenshot shows the Salesforce Lightning App Builder interface. The main preview area displays a record for 'Account Demo test' with a 'sync' button highlighted in red. The configuration panel on the right is titled 'Page > Sync Qb' and includes the following settings:

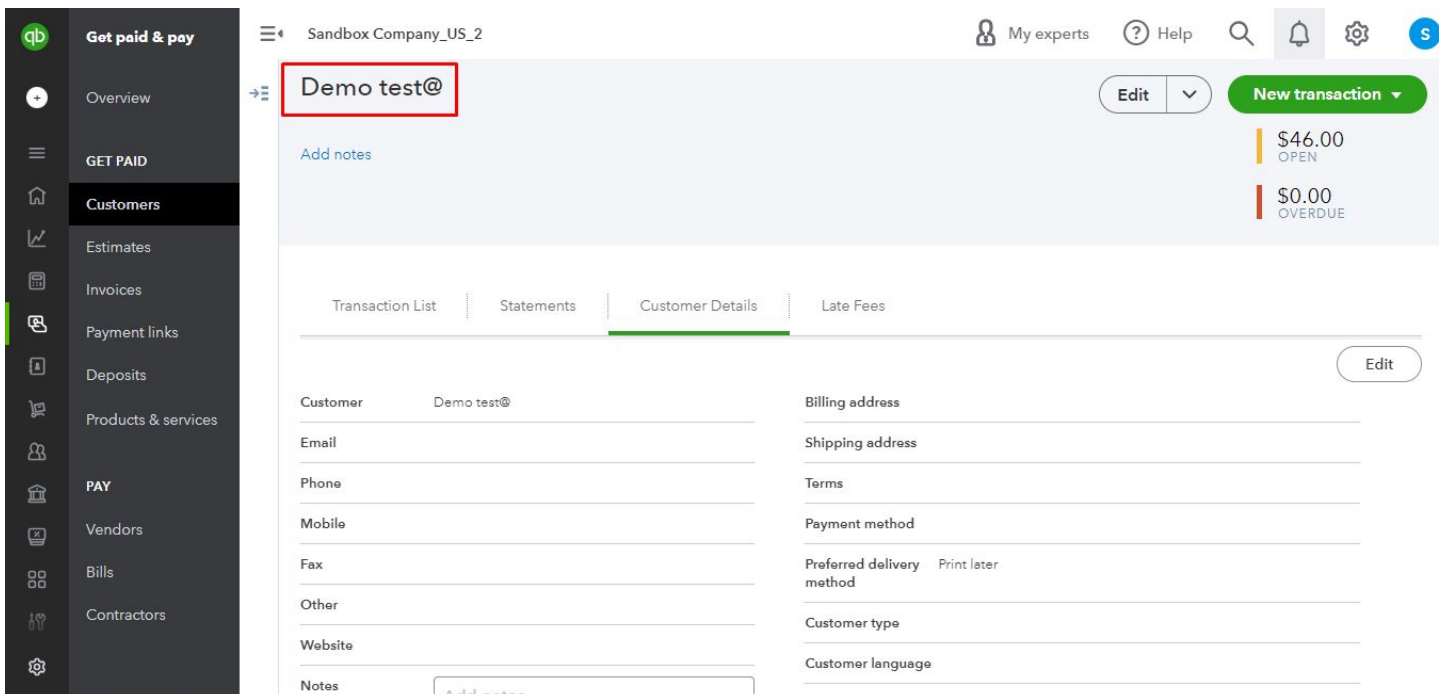
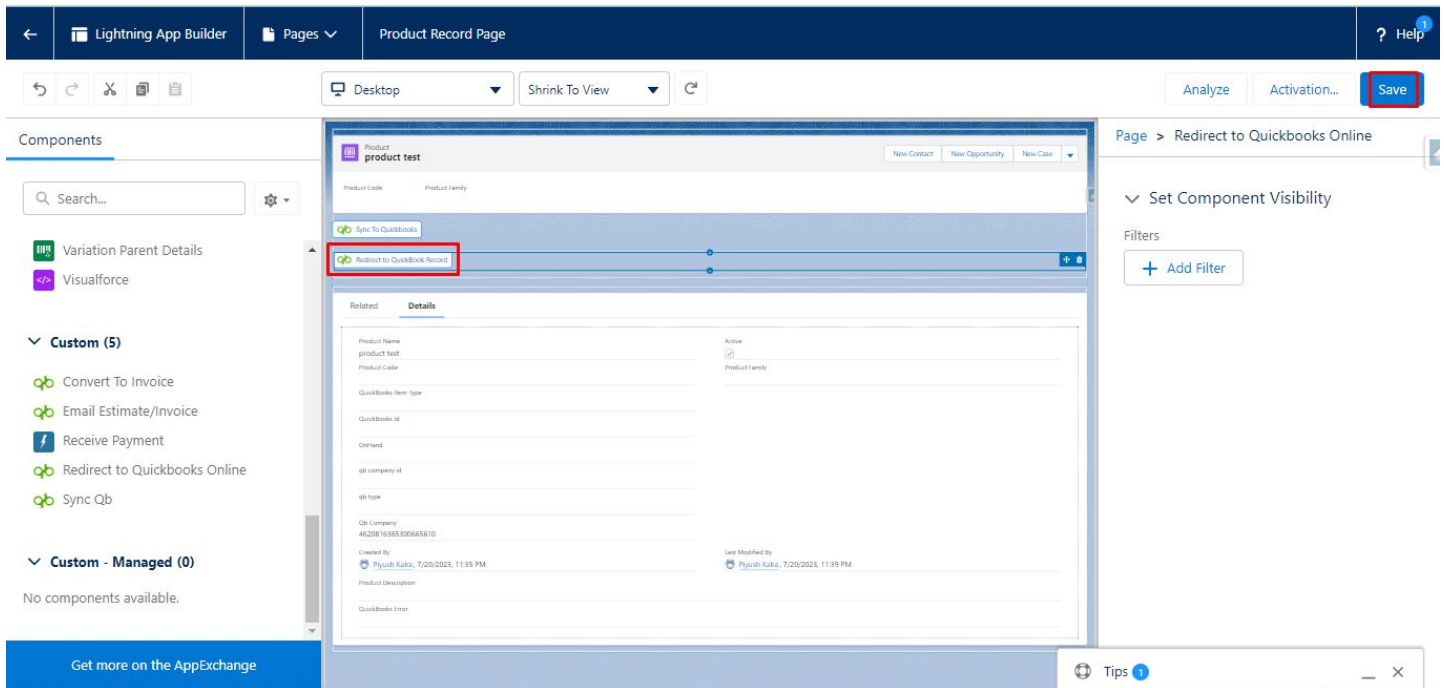
- Enter Quickbook Type: This is not mandatory to fill
- Enter Custom Label For Sync to Quickbook button: sync
- Choose Quickbook Company To Sync With: **Sandbox Company_US_2 (462081636530066)**
- Choose Quickbook Entity To Sync With: **Customer**
- Set Component Visibility: (Expanded)
- Filters: + Add Filter

A green success notification banner with a checkmark icon and the text: **Success**
Successfully synced to the Quickbooks

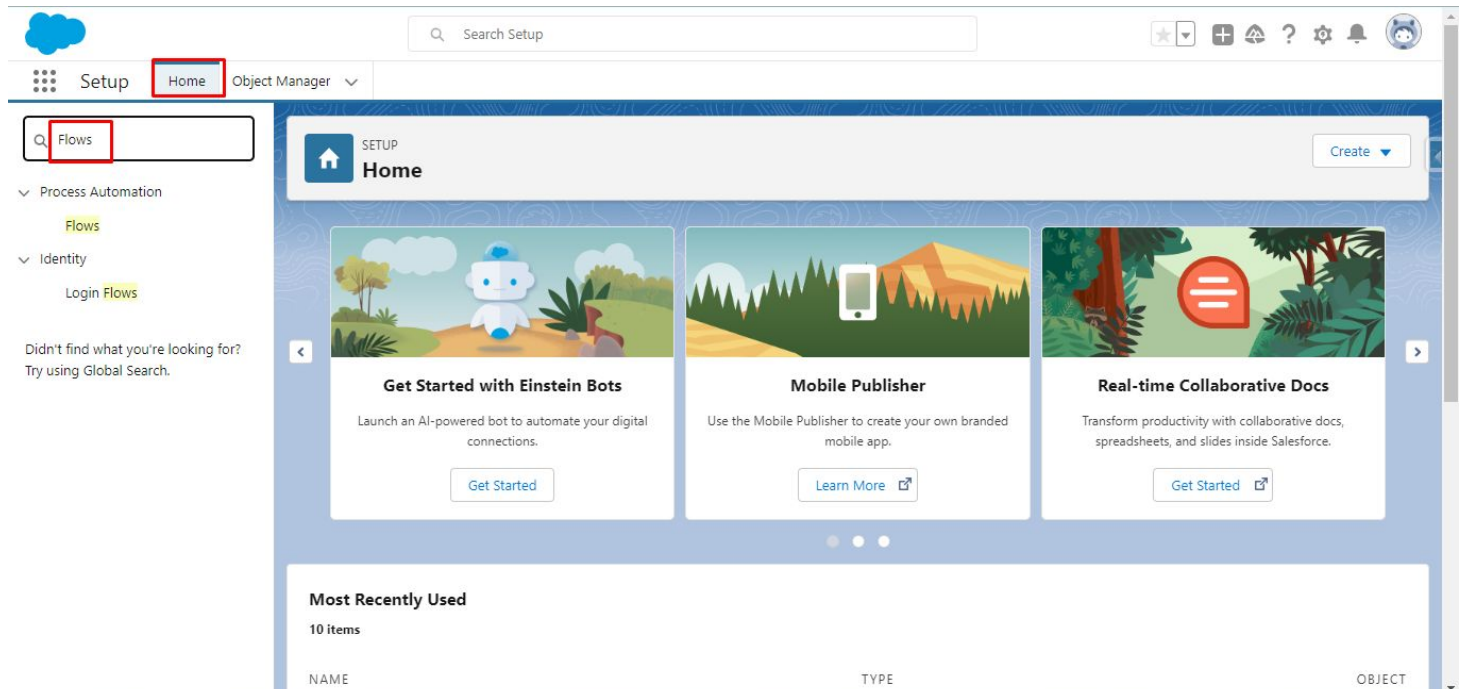
The screenshot shows the Salesforce record page for 'Account Demo test'. The 'Details' tab is active, displaying a list of fields with edit icons. The 'sync' button is visible in the top right corner of the record page.

Field	Value	Rating
Account Owner	[Avatar]	
Account Name	Demo test	
Parent Account		
Account Number		
Account Site		
Type		
Industry		

- **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.

Edit Apex Action

Set Input Values for the Selected Action

A_a companyId ⓘ



Include

A_a qbType ⓘ



Include

A_a recordId ⓘ



Include

A_a sObjectApiName ⓘ



Include

Cancel

Done

- 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

sync_qb_acc

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.

The screenshot displays the Salesforce Flow Builder interface. At the top, the title bar reads "Flow Builder" and "QbSyncMadeasy: Update Customer on Account Updation - V4". The main workspace shows a flow diagram starting with a "Start" node (Record-Triggered Flow) for the "Account" object, triggered by "A record is updated". It includes 5 conditions and is optimized for "Actions and Related Records". The flow proceeds through a "Run Asynchronously" node to an "Apex Action" node labeled "call Apex".

Below the flow diagram is a "Save as" dialog box. It features two buttons: "A New Version" (highlighted in blue) and "A New Flow". The dialog contains the following fields:

- *Flow Label: Sync qb acc
- *Flow API Name: [Auto-generated]
- Description: [Empty text area]

At the bottom right of the dialog, there are "Cancel" and "Save" buttons. The "Save" button is highlighted with a red box.

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 X
OR		
BillingCity	Is Changed	True X

Cancel

Edit Apex Action

Create Qb Record (Create_Qb_Record)

Set Input Values for the Selected Action

A _a companyId	<input type="text"/>	<input checked="" type="checkbox"/> Include
A _a qbType	<input type="text" value="Customer"/>	<input checked="" type="checkbox"/> Include
A _a recordId	<input type="text" value="{!\$Record.Id}"/>	<input checked="" type="checkbox"/> Include
A _a sObjectApiName	<input type="text" value="Account"/>	<input checked="" type="checkbox"/> 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.**

QB Sync
QB Made Easy Light... Home QB Setup * Demo test | Account * product test

Product **product test** New Contact New Opportunity New Case

Product Code Product Family

Sync To Quickbooks

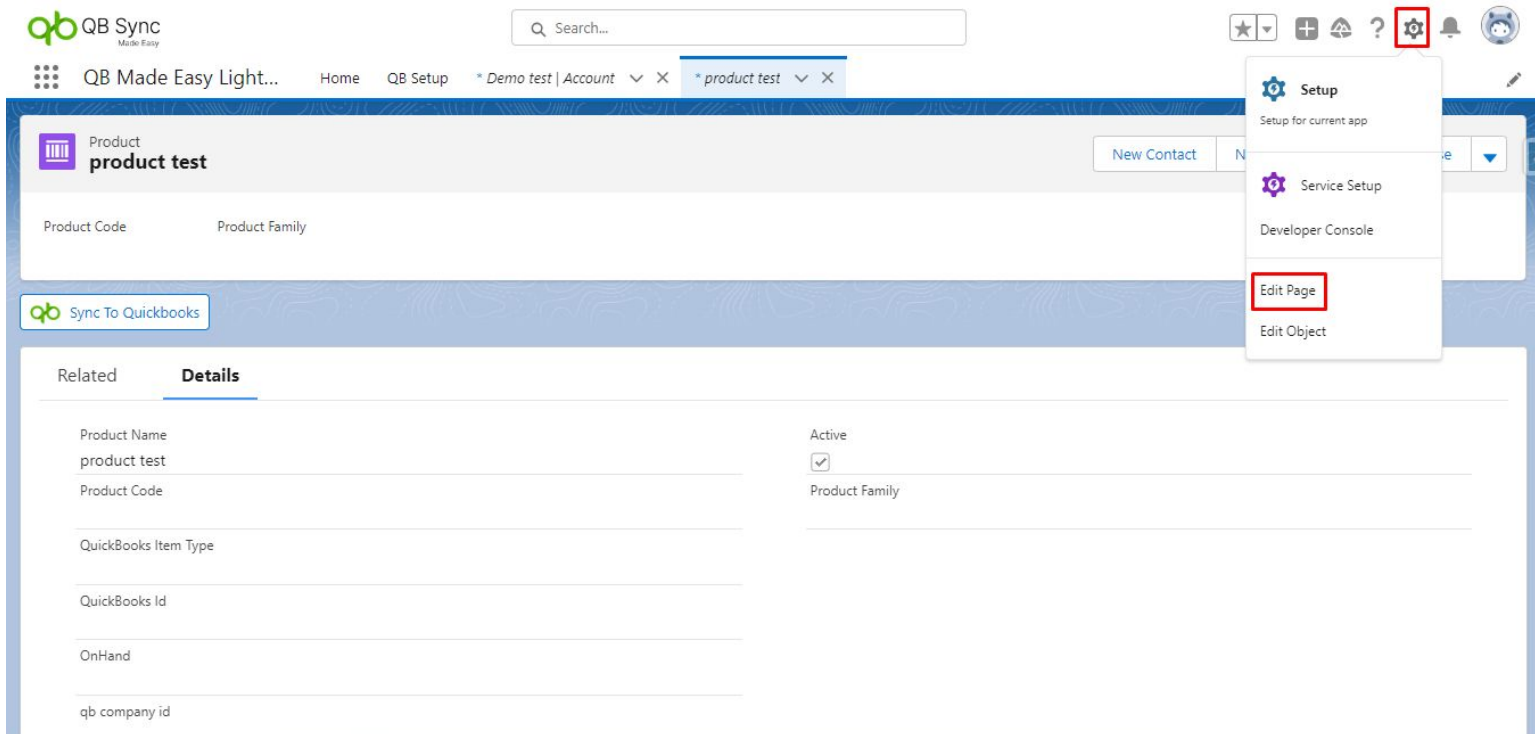
Related Details

Price Books (2) Add to Price Book

Price Book Name	List Price	Use Standard Price	Active
Standard Price Book	\$23.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Standard	\$23.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

View All

- **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

Product Record Page: Demo Product

Product Code | Product Family

Sync To Quickbooks

Related | **Details**

Product Name	Demo Product	Active	<input checked="" type="checkbox"/>
Product Code		Product Family	
Created By	27/06/2023, 12:22 pm	Last Modified By	27/06/2023, 12:22 pm
Product Description			

Page > Sync Qb

Enter Quickbook Type ⁱ
This is not mandatory to fill

Enter Custom Label for Sync to Quickbook button ⁱ
Enter Custom Label

Choose Quickbook CompanyId ⁱ

Choose Quickbook Entity to sync With ⁱ

Set Component Visibility

Filters
[+ Add Filter](#)

Tips ¹

QB Sync
Made Easy

QB Made Easy Light... | Home | QB Setup | * Demo Product

Success
Successfully synced to the Quickbooks

Product Record Page: product test

product test

Product Code | Product Family

Sync To Quickbooks

Related | **Details**

Product Name	product test	Active	<input checked="" type="checkbox"/>
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.

The screenshot shows the Lightning App Builder interface for a 'Product Record Page'. The main content area displays a 'product test' record with fields for Product Code, Product Family, and related details. A button labeled 'Redirect to QuickBooks Record' is highlighted with a red box. The left sidebar shows a 'Components' panel with various actions like 'Convert To Invoice', 'Email Estimate/Invoice', and 'Redirect to Quickbooks Online'. The right sidebar shows 'Set Component Visibility' and 'Filters' options. The top navigation bar includes 'Lightning App Builder', 'Pages', and 'Product Record Page'.

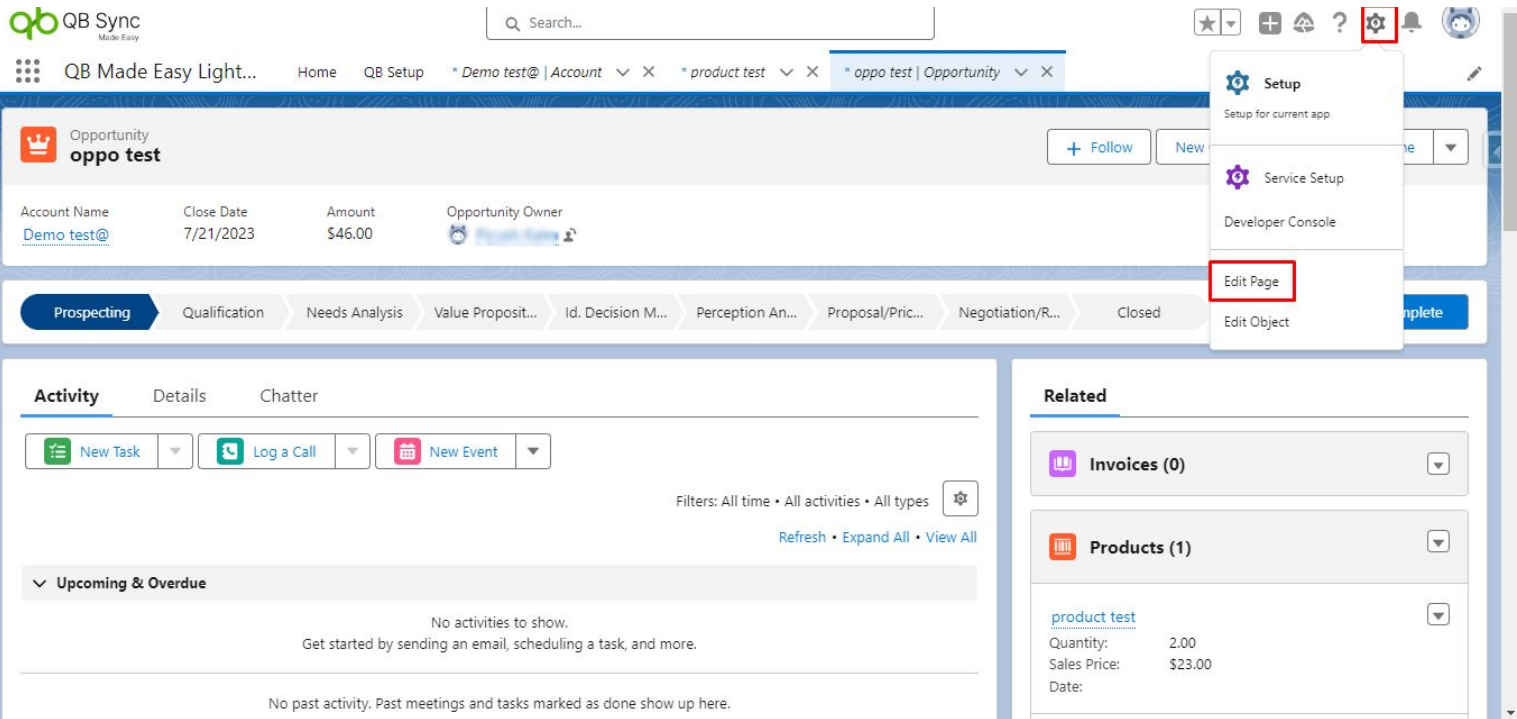
The screenshot shows the QuickBooks Online interface for 'Sandbox Company_US_5'. The main section is 'Products and Services', displaying a table of items. The 'Demo Product' is highlighted with a red box. The table includes columns for Name, SKU, Type, Sales Description, Sales Price, Cost, Taxable, Qty on Hand, Reorder Point, and Action. The 'Demo Product' is an Inventory item with a quantity of 5. The interface also shows 'LOW STOCK' and 'OUT OF STOCK' indicators at the top.

NAME	SKU	TYPE	SALES DESCF	SALES PRICE	COST	TAXABLE	QTY ON HAN	REORDER PC	ACTION
Demo Product		Inventory					5		Edit
Design		Service	Custom ...	75					Edit
Gardening		Service	Weekly ...	0					Edit

- **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.**

The screenshot displays the QB Sync web interface. At the top, there is a search bar and navigation tabs for 'Home', 'QB Setup', and several open tabs including 'Demo test@ | Account', '* product test', and '* oppo test | Opportunity'. The main content area shows the 'Details' view of an Opportunity record named 'oppo test'. The record is currently in the 'Prospecting' stage. The 'Account Name' field is highlighted with a red box and contains the text 'Demo test@'. Other fields include 'Opportunity Owner', 'Amount' (\$46.00), 'Expected Revenue' (\$4.60), 'Close Date' (7/21/2023), 'Next Step', 'Stage' (Prospecting), 'Probability (%)' (10%), and 'Primary Campaign Source'. On the right side, the 'Related' section shows 'Invoices (0)', 'Products (1)' (highlighted with a red box), and 'Notes & Attachments (0)'. The 'Products (1)' section lists a product named 'product test' with a quantity of 2.00 and a sales price of \$23.00.

- **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

Opportunity Record Page: oppo test

Account Name: Demo test@ Close Date: 7/21/2023 Amount: \$46.00 Opportunity Owner: [User]

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.

No past activity. Past meetings and tasks marked as done show up here.

Related

Insufficient permissions: You don't have user access to view this component.

Invoices (0)

Products (1)

product test

Quantity: 2.00 Sales Price: \$23.00 Date: View All

Notes & Attachments (0) Upload Files

Page Analysis Moderate

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

QB Sync Made Easy

QB Made Easy Light... Home QB Setup * Demo test@

Success Successfully synced to the Quickbooks

Opportunity Record Page: oppo test

Account Name: Demo test@ Close Date: 7/21/2023 Amount: \$46.00 Opportunity Owner: [User]

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)

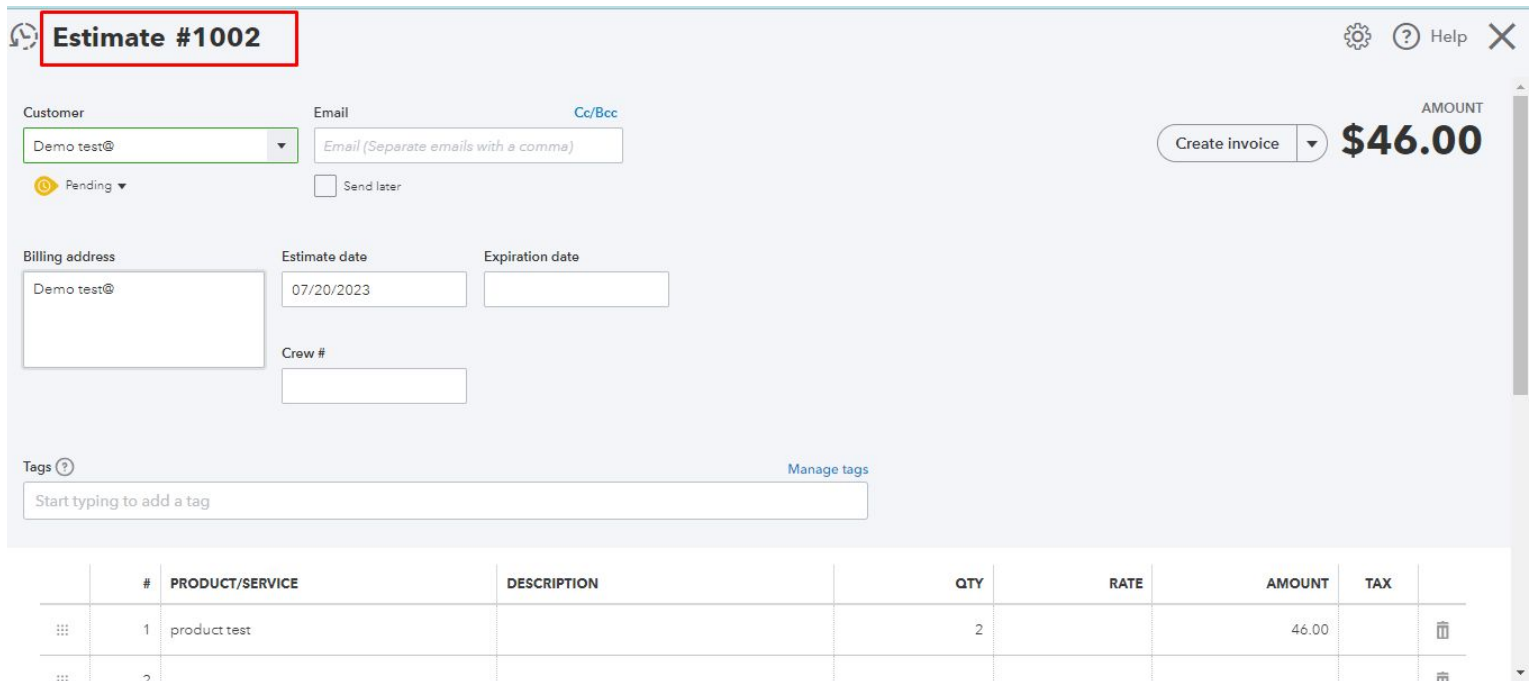
Products (1)

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.



The screenshot shows the QuickBooks Online interface for an estimate. At the top left, the title "Estimate #1002" is highlighted with a red box. The top right corner contains a settings gear, a help icon, and a close button. The main form area includes fields for Customer (Demo test@), Email (with a Cc/Bcc link), and a "Create invoice" button. The total amount is displayed as \$46.00. Below these are fields for Billing address, Estimate date (07/20/2023), Expiration date, and Crew #. A "Tags" section is also present. At the bottom, a table lists the estimate items.

#	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	TAX
1	product test		2		46.00	
2						

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.

The screenshot displays the Salesforce interface for an Opportunity record named 'oppo test'. The top navigation bar includes the 'QB Sync' logo and a search bar. The main header shows the opportunity name and a table with the following data:

Account Name	Close Date	Amount	Opportunity Owner
Demo test@	7/21/2023	\$46.00	[User Avatar]

Below the table, there are three buttons: 'Redirect to QuickBook Record', 'Sync To Quickbooks', and 'Send Estimate as an Email and PDF'. The 'Send Estimate as an Email and PDF' button is highlighted with a red rectangular box. The interface also shows a sales process flow with stages: Prospecting, Qualification, Needs Analysis, Value Proposit..., Id. Decision M..., Perception An..., Proposal/Pric..., Negotiation/R..., and Closed. The 'Prospecting' stage is currently active. On the right, there is a 'Related' section with 'Invoices (0)' and 'Products (1)'. The bottom section includes an 'Activity' tab with options for 'New Task', 'Log a Call', and 'New Event', along with filter settings and refresh options.

Gmail Search in mail Active

Compose


Inbox 28

- Starred
- Snoozed
- Sent
- Drafts
- More

Labels +

----- Estimate Summary -----
Estimate # : 1002
Estimate Date: 07/20/2023
Total: \$46.00
The complete version has been provided as an attachment to this email.

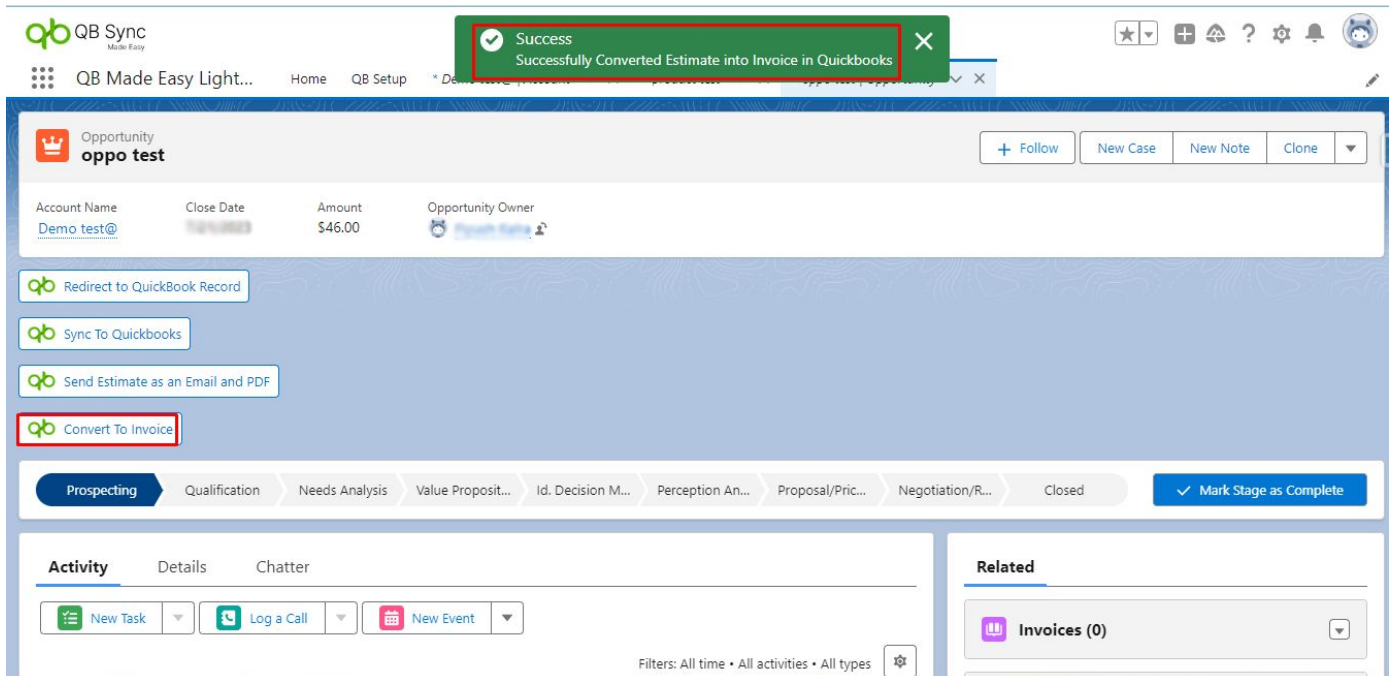
One attachment • Scanned by Gmail



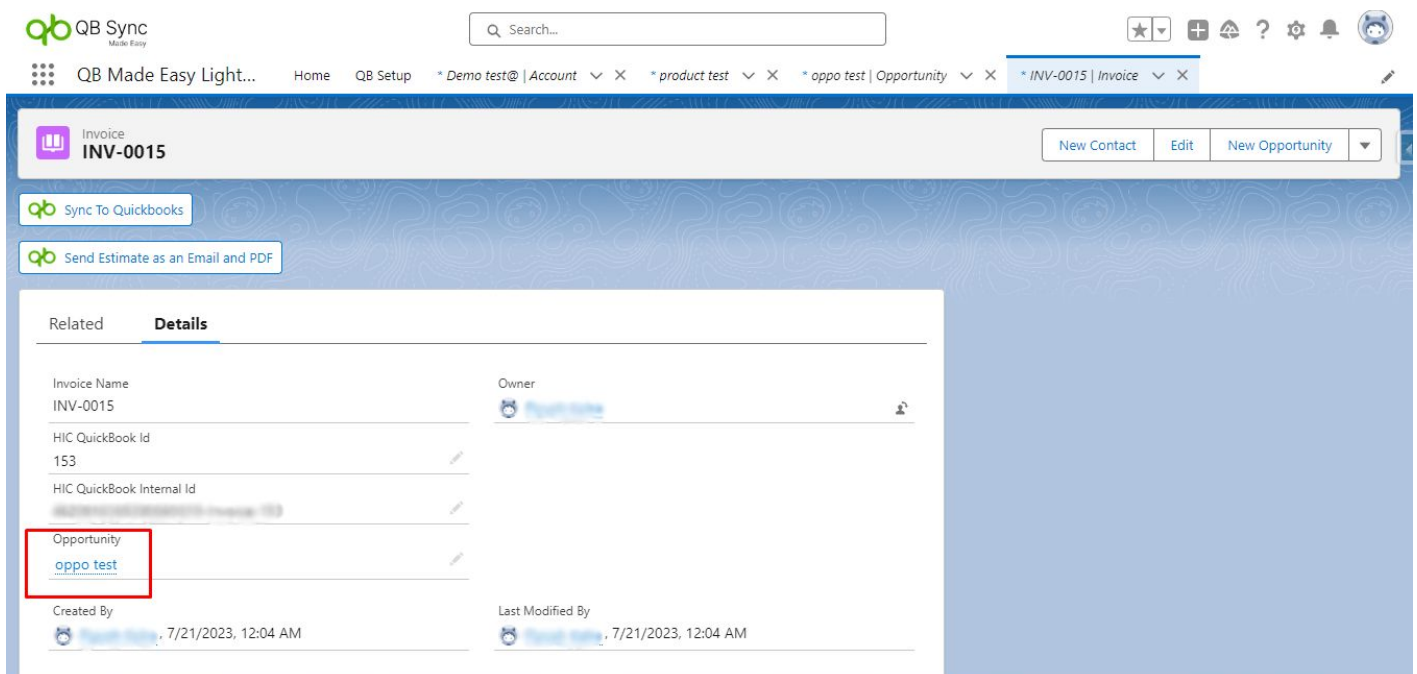
← Reply → Forward

- **4.5 Convert Estimate to Invoice From Salesforce.**

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

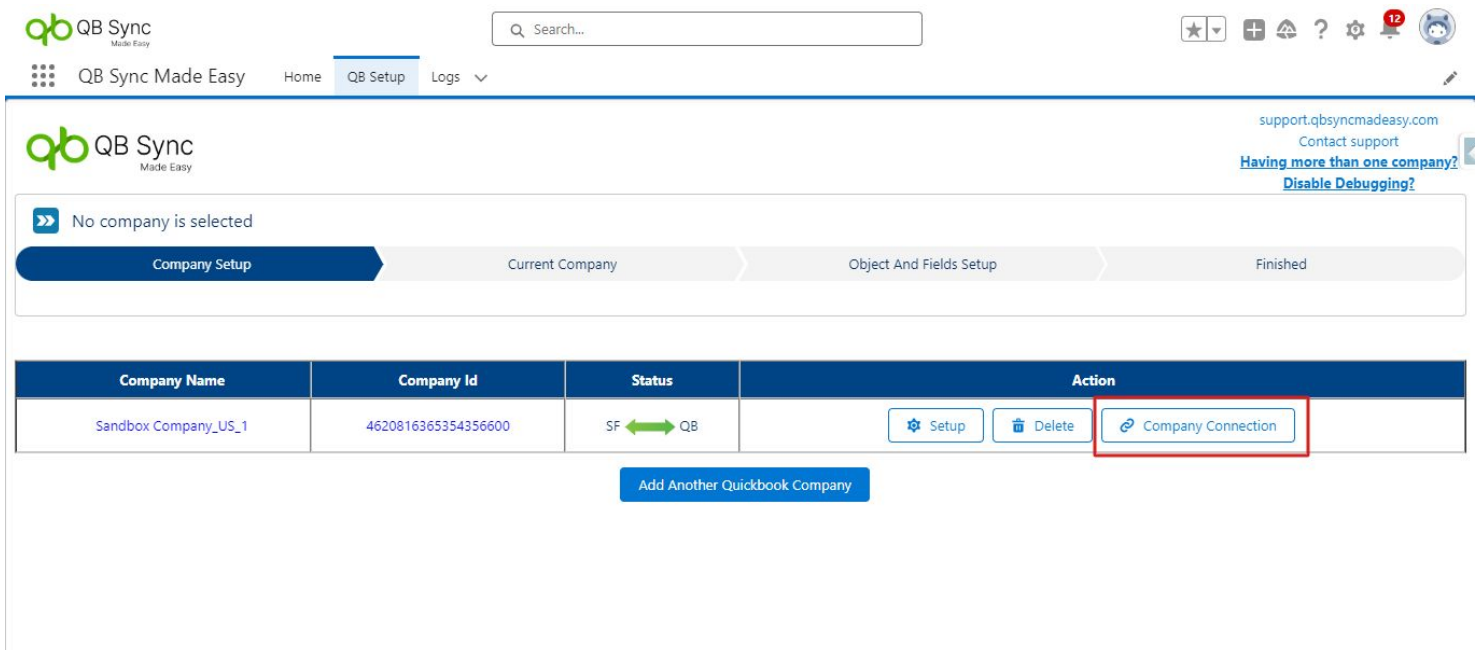


Step 29: Now Go to the App launcher and Search for the Invoice then you have to See your Invoice.



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.



QB Sync Made Easy

Home QB Setup Logs

support.qbsyncmadeasy.com
Contact support
Having more than one company?
Disable Debugging?

No company is selected

Company Setup Current Company Object And Fields Setup Finished

Company Name	Company Id	Status	Action
Sandbox Company_US_1	4620816365354356600	SF ↔ QB	Setup Delete Company Connection

Add Another Quickbook Company

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



To access this page, you have to log in to Salesforce.

Username

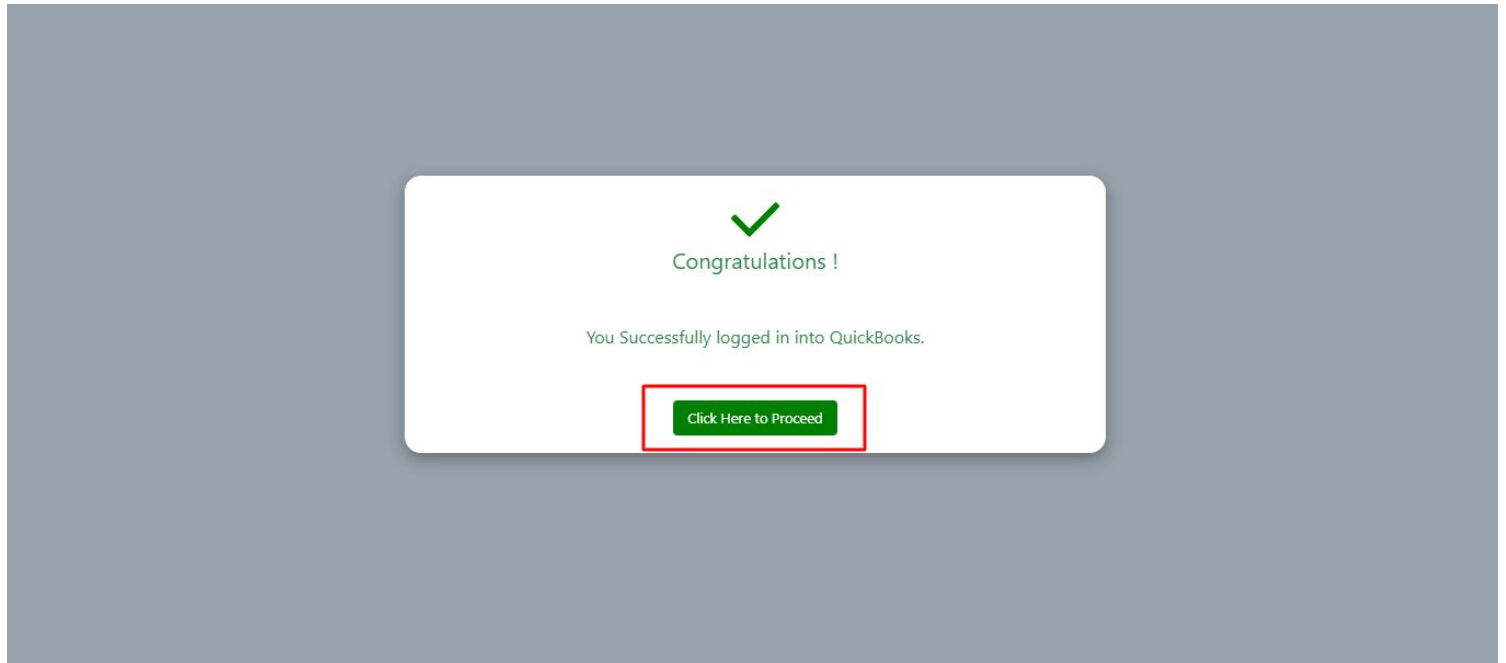
Password

Log In

Remember me

[Forgot Your Password?](#) [Use Custom Domain](#)

- **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.

Sandbox Company_US_1



QuickBooks Online To Salesforce Mapping

Switch To Default Mappings?

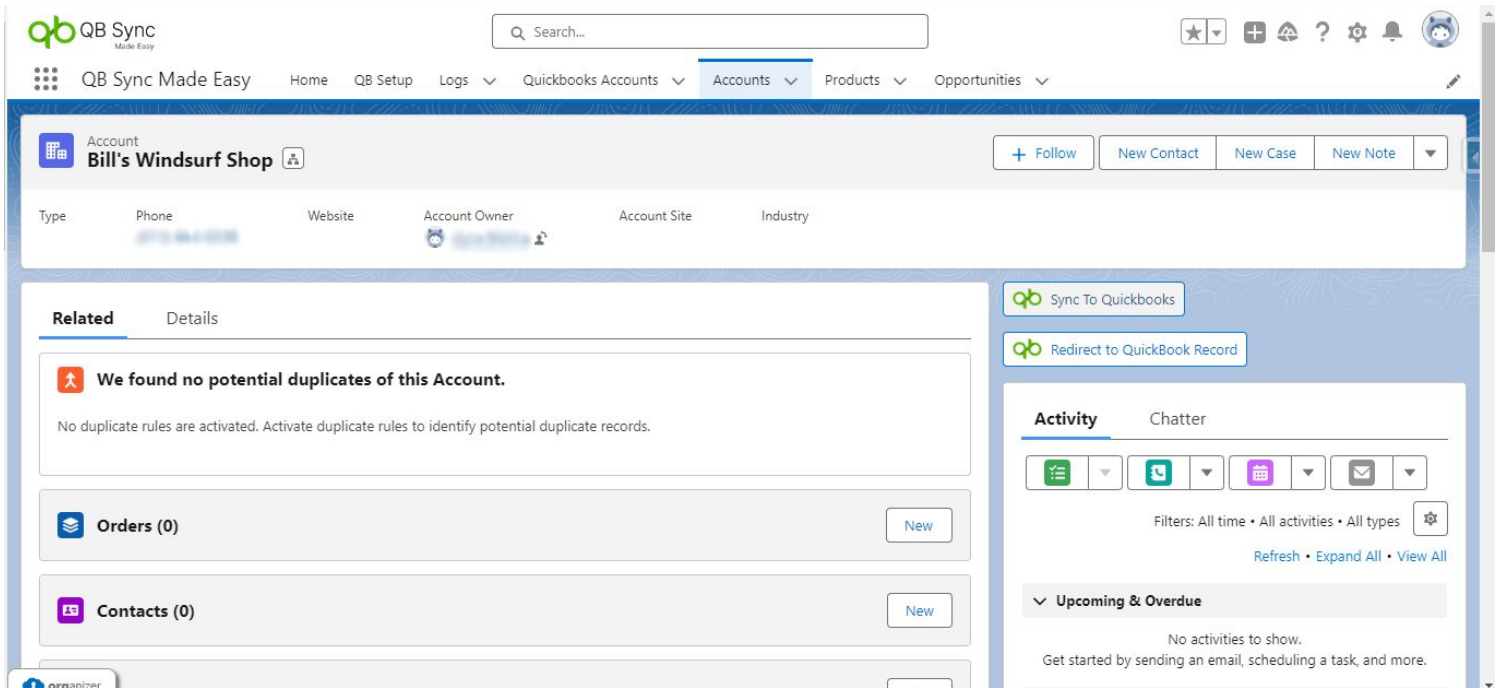
Quickbook Object	Salesforce Object	Field Mapping	Action
Customer	Account	+	▼
Item	Product	+	▼
Estimate	Opportunity	+	▼

Add

Save All Save And Sync

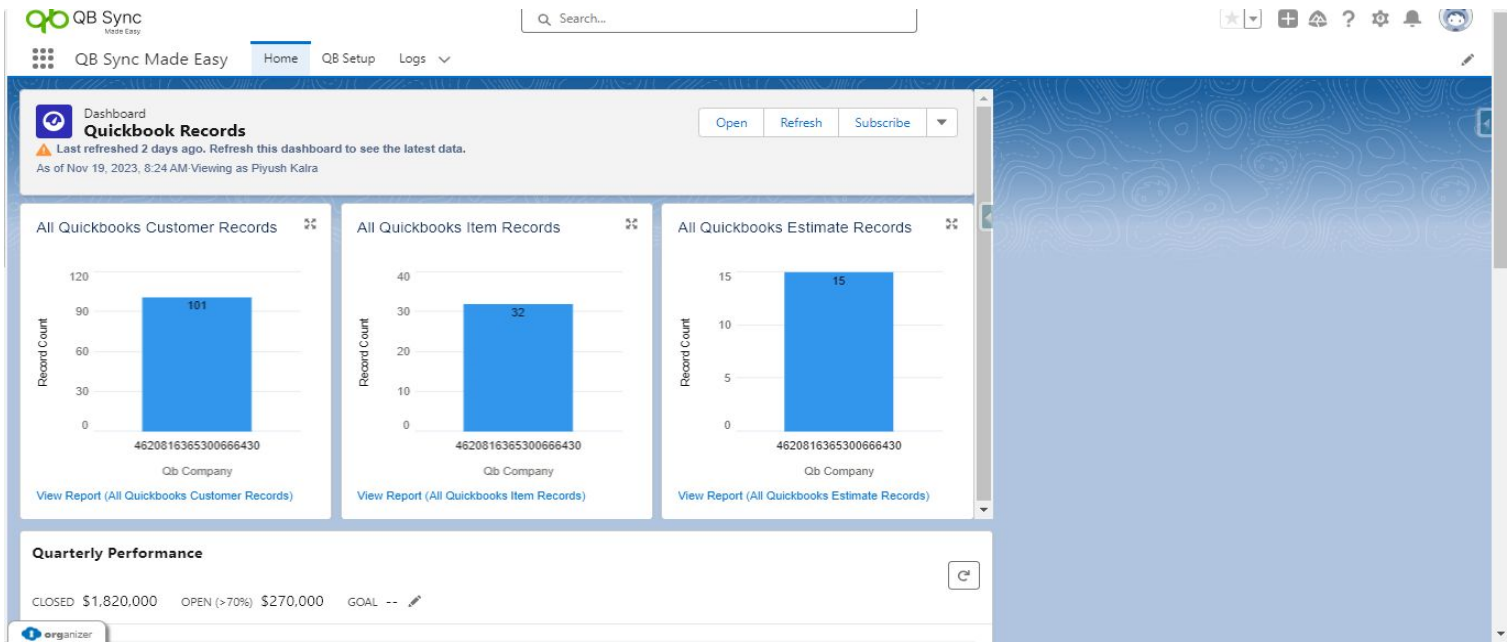
- **Step 34:** Now just create a Record in the quickbooks and Check in the Salesforce.

The screenshot shows the QuickBooks Online interface. On the left, a sidebar menu includes 'Customers'. The main area displays a customer record for 'Demo test@'. The 'Name and contact' section is visible, with fields for Title, First name, Middle name, Last name, and Suffix. The 'Customer display name' field is highlighted with a red box and contains the value 'Demo test@2'. A 'Save' button is highlighted with a red box at the bottom right.



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:

support.qbsyncmadeasy.com
 Contact support
 Having more than one company?
 Enable Debugging?

No company is selected

Company Setup | Current Company | Object And Fields Setup | Finished

Company Name	Company Id	Status	Action
Sandbox Company_US_1	4620816365354356600	SF ↔ QB	Setup Delete Company Connection

Add Another Quickbook Company

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.

The screenshot displays the QB Sync Made Easy application interface. At the top, there is a search bar and navigation icons. The main header includes the QB Sync logo and the text 'QB Sync Made Easy'. Below the header, there is a navigation menu with 'Home', 'QB Setup', and 'Logs'. The 'QB Setup' section is active, showing a progress bar with four steps: 'Company Setup' (highlighted), 'Current Company', 'Object And Fields Setup', and 'Finished'. Below the progress bar, there is a table with columns: 'Company Name', 'Company Id', 'Status', and 'Action'. The table contains one row with the following data:

Company Name	Company Id	Status	Action
Sandbox Company, LLC, 1	4622816282254210000	SF ↔ QB	Setup Delete Company Connection

Below the table, there is a button labeled 'Add Another Quickbook Company'. In the top right corner of the application, there is a link for 'support.qbsyncmadeasy.com' with a sub-link 'Contact support' highlighted in a red box. Other links include 'Having more than one company?' and 'Disable Debugging?'.

Sandbox Company_US_2

Contact support

* Issue

I need help

Submit

Company Name

Sandbox Company_US_2

Company Id

4620816365300665610

Status

Active

Email(Optional)

Quickbook Customer Query From OrgId() Inbox x



via uo4on3qrh9bcmf52.yc30itvb8gng8xsg.4sadxl.5g-4dmybea0.ap24.bnc.salesforce.com
to me

12:54 PM (0 minutes ago) ☆ ↶ ⋮

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

thank
you

