

Explore the complete feature set of QB Sync Made Easy — connect, synchronize, and manage QuickBooks Online data directly within Salesforce.

01 · QuickBooks Connection & Configuration

QuickBooks Online Integration	Connect Salesforce with QuickBooks Online to synchronize business data between both platforms. Learn more →
Multiple QuickBooks Companies	Connect and manage multiple QuickBooks Online companies from Salesforce. Learn more →
Easy OAuth Connection	Securely connect Salesforce to QuickBooks Online using QuickBooks OAuth authentication. Learn more →
Company Management	View and manage connected QuickBooks companies and their connection status. Learn more →
Sync Configuration	Configure which Salesforce and QuickBooks objects should be synchronized and in which direction.

02 · Data Synchronization

Two-Way Data Sync	Synchronize supported records between Salesforce and QuickBooks Online, including Salesforce → QuickBooks and QuickBooks → Salesforce. Learn more →
Real-Time Sync	Synchronize supported records from QuickBooks to Salesforce when changes are made in QuickBooks Online. Learn more →
Manual Sync Using QB Sync Button	Manually trigger synchronization for individual records using the QB Sync button. Learn more →
Historic Sync	Import existing QuickBooks records into Salesforce and synchronize historical data. Learn more →
Automatic Record Creation	Create records in Salesforce and automatically synchronize them to QuickBooks using Salesforce Flow actions. Learn more →
Record Update Sync	Update existing QuickBooks records when corresponding information changes in Salesforce using Flow-based synchronization. Learn more →

03 · ✨ Matching — Manual & AI-Powered

AI Assist Matching	Use AI-assisted matching to identify potential matches between Salesforce and QuickBooks records.
Manual Matching	Manually match Salesforce records with existing QuickBooks records when required.
Duplicate Prevention	Match existing records before synchronization to help prevent duplicate customers, products, invoices, and other supported records.

04 · Salesforce ↔ QuickBooks Object & Field Mapping

Standard Object Field Mapping	Configure mappings between Salesforce standard objects and fields and QuickBooks objects and fields. Learn more →
Custom Object Field Mapping	Support field mapping between custom Salesforce objects and QuickBooks objects. Learn more →
QBO Custom Field Support	Support QuickBooks Online custom fields for synchronization between Salesforce and QuickBooks.
Related Field Mapping	Configure mappings between related records, such as Invoice and Invoice Line Item fields.
Bi-Directional Field Mapping	Configure supported field mappings for both Salesforce → QuickBooks and QuickBooks → Salesforce synchronization.

05 · QB Dashboard

QB Dashboard	Centralized dashboard within Salesforce to monitor QuickBooks data and synchronization activity.
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06 · Multi-Currency & Exchange Rate

QB Exchange Rate Sync	Synchronize QuickBooks Online exchange rates with Salesforce to support accurate multi-currency transactions.
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07 · Sync Monitoring & Error Handling

Sync Message	Display synchronization status messages on supported Salesforce records to indicate whether synchronization was successful or failed.
Error Message	Display relevant error information returned by Salesforce or QuickBooks Online when synchronization fails.

Error Log with Error Details

Enable error logging to capture relevant QuickBooks or Salesforce synchronization error details and support troubleshooting.

[Learn more →](#)

08 · QuickBooks Data Management

QuickBooks Record Identification

Maintain QuickBooks identifiers in Salesforce to establish relationships between Salesforce and QuickBooks records.

QuickBooks ID Tracking

Store and use QuickBooks record IDs to identify synchronized records and help prevent unnecessary duplicates.

Company-Specific Data

Support synchronization across connected QuickBooks companies while maintaining company-specific relationships.

09 · Automation & Workflow

Salesforce Automation Support

Work with Salesforce automation and Flow to initiate or support synchronization when records are created or updated.

10 · Configuration & Administration

Object Mapping Configuration

Enable or disable synchronization for individual supported objects.

Sync Direction Configuration

Configure whether an object synchronizes from Salesforce → QuickBooks, QuickBooks → Salesforce, or both.

Permission-Based Access

Control access to QB Sync Made Easy functionality through Salesforce permission sets.

[Learn more →](#)

Sandbox & Production Support

Configure and test QuickBooks connections in Salesforce and QuickBooks environments before production deployment.

Built to keep your books and your CRM in sync — accurately, and without manual work.

[🌐 qbsyncmadeeasy.com](https://qbsyncmadeeasy.com) | [✉ Support@qbsyncmadeeasy.com](mailto:Support@qbsyncmadeeasy.com)

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