



End User Documentation:

Custom Quote Sync App

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[Jump to Installation Instructions](#)

Overview

This Salesforce App automatically **synchronizes data** between:

- **Quotes ↔ Opportunities**
- **Quote Line Items (QLIs) ↔ Opportunity Line Items (OLIs)**

It ensures consistency between Quotes and Opportunities, reduces manual effort, and keeps related records aligned — without needing custom flows or manual updates.

Key Features

Feature	Description
Automatic Real-Time Sync	When Quotes or QLIs are inserted/updated, corresponding Opportunities or OLIs are automatically synced.
Configurable Sync Direction	One-way Syncing, Bi-Directional, No Sync, Hybrid (using exclusions)
Enable Async Update	When enabled, all syncing between records will happen asynchronously.
Delayed Parent Sync	Parent Opportunity updates are deferred to a final stage to minimize repeated processing and can allow a custom configured delay time for all related processes to complete before syncing a value between the Quote and Opportunity.
Dynamic Sync	Enabled by default, this setting allows for zero-configuration-needed syncing between fields that have matching API names
Recursion Protection	Controls how many times a record can trigger syncs to avoid infinite loops and allows for records to update multiple times (recursive) in a single update transaction .
Hard-coded Field Exclusions	Prevents system fields (e.g., Id, CreatedDate) from syncing.

Custom Field Mapping

Allows syncing custom fields via Metadata configuration for fields that do not automatically sync using dynamic sync. Required when dynamic sync is disabled.



Sync Direction Settings

**The Quote Sync Utility utilizes Salesforce native quote sync functionality. Sync settings only apply to an Opportunity with a Syncing Quote. This tool does not override Salesforce native sync behavior. Salesforce standard fields will still sync in both directions regardless of Quote Sync settings when a quote is syncing with an opportunity.

- **One-way sync** only (Quote → Opportunity).
 - **Quote ⇒ Opportunity:** Selected fields and values copied from Quote to related Opportunity. *Default Setting.*
 - **Quote Line Item ⇒ Opportunity Line Item:** Details from Quote Line Items copied to corresponding Opportunity Products. *Default Setting.*
**Changes on Opportunities or OLIs do not sync back to Quotes or QLIs.*
 - **Opportunity ⇒ Quote:** Selected fields and values copied from Opportunity to related Quote.
 - **Opportunity Line Item ⇒ Quote Line Item:** Details from Opportunity Products copied to corresponding Quote Line Items.
**Changes on Quotes or QLIs do not sync back to Opportunities or OLIs.*
- **Bi-Directional Sync**
 - **Quote Sync Direction:** Selected fields and values copied from Quote to related Opportunity and from related Opportunity to Quote.
 - **Quote Line Sync Direction:** Details from Quote Line Items copied to corresponding Opportunity Products and from related Opportunity Products to Quote Line Items.
- **Do Not Sync**
 - **Quote Sync Direction:** No fields are updated in either direction.
 - **Quote Line Sync Direction:** No fields are updated in either direction.



Sync Behavior Settings

- **Enable Async Update**

This is particularly useful when syncing a rollup summary field to a corresponding field that is not a rollup. Enabling this also speeds up the time it takes for a record to save.
- **Enable Delayed Sync on Parent**
 - When enabled, this setting allows the user to configure a delayed sync between parent records which is triggered when a line-level record is updated. This is also useful when syncing a rollup summary field on the parent level to a field on the corresponding parent record. This gives the summary field time to resolve before transferring the value.
 - It is also useful in ensuring only a single entry in parent-level field history tracking when multiple line-level records are updated in a single transaction by waiting until all updates have completed before syncing parent records.
 - **Delayed Sync Settings**
 - **Delay Time:** The number of minutes/seconds to wait prior to triggering parent-level sync
 - **Delay Measure:** option to set the delay time in either minutes or seconds
- **Dynamic Sync**

- **Parent Dynamic Sync** - When checked, enables dynamic (zero-config) syncing between editable fields that have the same API Name and Field Type on Quote/Opportunity (Parent) objects
- **Line Dynamic Sync** When checked, enables dynamic (zero-config) syncing between editable fields that have the same API Name and Field Type on Quote Line Item /Opportunity Product (Line) objects

****Dynamic sync does not work between a rollup summary fields or formula fields and their corresponding input value fields of the same type. I.e A rollup currency field named TCV__c will not dynamically sync with a currency field of the same name. A [Custom Mapping](#) must be created.**



Recursion Control

The system **limits recursion** to prevent endless sync loops. Default setting is to prevent recursion at both the parent and line level. Allowing recursion enables the triggering record to be re-synced after initially syncing its values to the corresponding record.

- Each sync event tracks the **number of recursion hops**.
- If updates exceed the **maximum recursion threshold** (defined internally), sync stops for that transaction.
- This protects against infinite trigger loops if another automation fires during syncing.
- Recursion Settings:
 - Prevent Line Level Recursion
 - Prevent Parent Level Recursion
 - Prevent Both
 - Allow Recursion



Troubleshooting

- A **Quote Sync Log** object has been included to keep track of logged errors. If for some reason fields are not syncing, search for and open the **Quote Sync Logs** list view to view any error messages.
- Alternatively, error messages may present themselves in the list of past run Apex jobs. These jobs can be viewed in:
 - **Apex Jobs:** Setup > Environments > Jobs > Apex Jobs
 - **Scheduled Jobs:** Setup > Environments > Jobs > Scheduled Jobs



Excluded Fields

****Only applicable when Dynamic Sync is enabled. Gives the user more control over which fields with Matching API names are synced.**

- **Opportunity Fields to Exclude**
 - **Applicable Sync Settings**
 - **Bi-Directional**
 - **Quote to Opportunity**
 - Fields should be populated as a comma separated list. Any fields included in this list will not be updated, however their values may still be passed to the Quote object if they are not listed in the **Quote fields to Exclude** list and sync is set to Bi-Directional.
- **Quote Fields to Exclude**

- **Applicable Sync Settings**
 - **Bi-Directional**
 - **Opportunity to Quote**
- Fields should be populated as a comma separated list. Any fields included in this list will not be updated, however their values may still be passed to the Opportunity object if they are not listed in the **Opportunity fields to Exclude** list and sync is set to Bi-Directional.
- **Opportunity Product Fields to Exclude**
 - **Applicable Sync Settings**
 - **Bi-Directional**
 - **Quote to Opportunity**
 - Fields should be populated as a comma separated list. Any fields included in this list will not be updated, however their values may still be passed to the Quote object if they are not listed in the **Quote Line fields to Exclude** list and sync is set to Bi-Directional.
- **Quote Line Fields to Exclude**
 - **Applicable Sync Settings**
 - **Bi-Directional**
 - **Opportunity to Quote**
 - Fields should be populated as a comma separated list. Any fields included in this list will not be updated, however their values may still be passed to the Opportunity object if they are not listed in the **Opportunity Products fields to Exclude** list and sync is set to Bi-Directional.
- **Disable Custom Mappings** This is used primarily for troubleshooting. When marked true, all custom field mappings are disabled and will not sync.



Default Excluded Fields

The app automatically ignores specific system fields you should never map.

Hard-coded Excluded Fields

Opportunity/Quote:

- Id
- CreatedDate
- CreatedById
- LastModifiedDate
- LastModifiedById
- SystemModstamp
- IsDeleted
- LastReferencedDate
- LastViewedDate
- Async_Job_In_Progress__c

Opportunity Product / Quote Line Item:

- Id
- OpportunityId
- QuoteLineItemId
- CreatedDate

- CreatedById
 - LastModifiedDate
 - LastModifiedById
 - SystemModstamp
 - IsDeleted
 - LastReferencedDate
 - LastViewedDate
 - Async_Job_In_Progress__c
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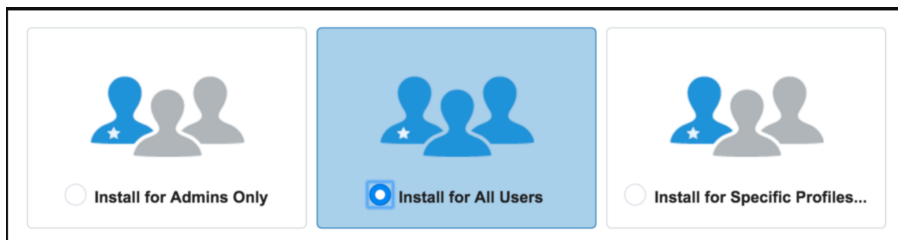
Custom Field Mappings

Applicable when dynamic sync is disabled or synced fields do not share the same API name.
(e.g., **ARR__c** on Quote → **Annual_Recurring_Rev__c** on Opportunity).

- Go to **Setup** → **Custom Metadata Types** → **Quote Sync Custom Mapping**.
- Create new records:
 - **Label:** Name of Mapping (User Defined)
 - **Quote Sync Custom Mapping Name:** API Unique Name
 - **Active** True/False -determines whether the field mappings are active or inactive
 - **Object Level:** Indicates whether field is Opportunity/Quote Sync or Opportunity Product/Quote Line Item Sync
 - **Opportunity Field:** Field name on the Opportunity / Opportunity Product
 - **Quote Field:** Field name on the Quote / Quote Line Item

Installation

- Access install link (<https://login.salesforce.com/packaging/installPackage.apexp?p0=04xxxxxxxxxxxxxx>)
 - **Replace 'login.salesforce.com' with 'test.salesforce.com' for Sandbox installs
- Select 'Install for All Users'



- Once install is complete, add users to the **QuoteSync Required Fields Access** permission set

- Navigate to and configure the following **Custom Metadata Types**
(Setup > Custom Code > Custom Metadata Types)
 - Quote Sync Setting (Manage Records)
 - [Quote Sync Custom Mapping](#) (Manage Records)