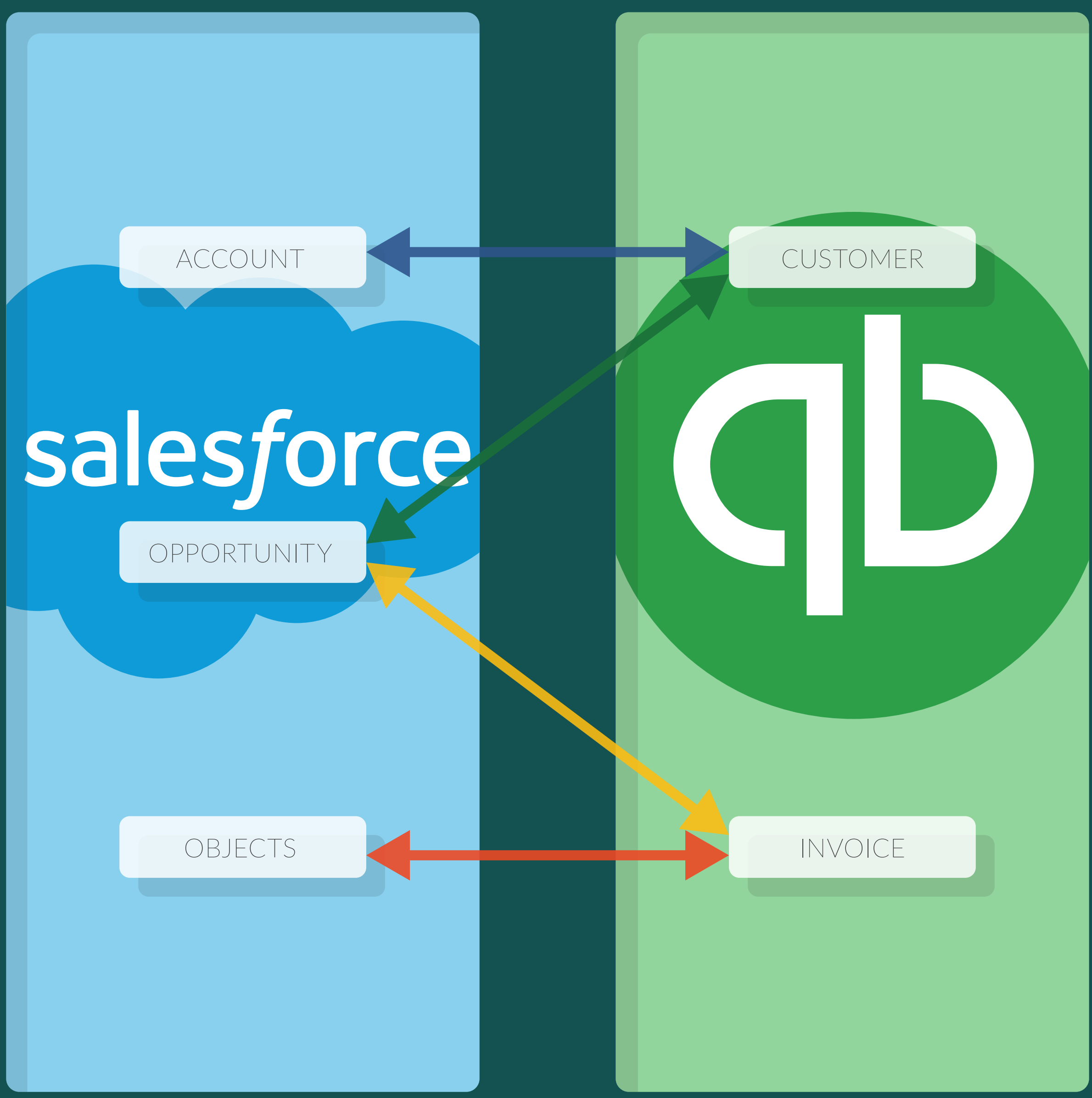
Salesforce + QuickBooks Online Solution

by workato



In recent years, more than ever, business functions are more tightly linked within SMBs due to the explosion of best-of-breed cloud applications. Owners want the best apps, like Salesforce, to help find customers to buy their product. They also want apps like QuickBooks to make sure money actually comes in the door when a customer makes a commitment to buy.

Businesses need their Salesforce and QuickBooks apps to integrate seamlessly given how interdependent they are. Both apps rely on similar data (customer sales information), trigger a series of actions (invoicing when a sale is made), and are usually done by two different business units within a company (sales and finance). But pre-built integrations don't fully meet the need of powerful apps like this given the custom ways users need these apps to work.

There is a major need for syncing Salesforce and QuickBooks and it has not been sufficiently met.

To address this, in 2011, Intuit released the 'Salesforce for QuickBooks integration' solution. However, Intuit and Salesforce have recently decided to shut down this product as of December 3rd, 2014. As part of the shut down, they cited their challenges with customization that the solution could not support.

The big insight here, though, was that customization needed to be put in the hands of app users. And here it is today.

This guide describes Workato's Salesforce + QuickBooks Online Solution. It also includes some popular integration recipes that were created by the community. If you are a Salesforce and QuickBooks Online user, please feel free to use and customize them to meet your specific needs. Or, simply create your own recipes and get going within minutes! If you have any questions, please contact us or drop a note to tell us how we're doing at sfdc-integrations@workato.com.

Vijay Tella
CEO

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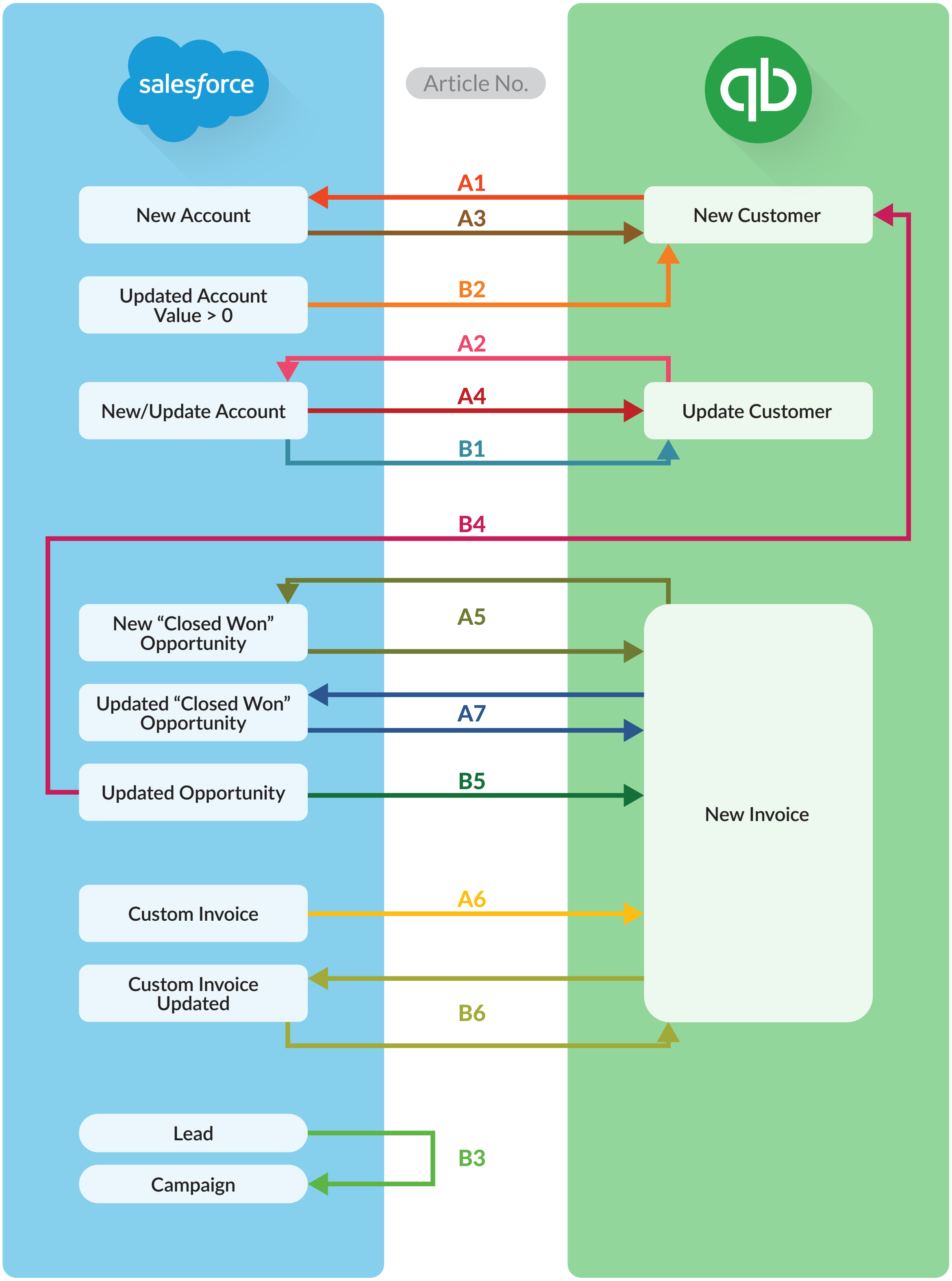
Sign up / Contact Us

* These recipes will be pre-populated in your account if you sign up with your Salesforce ID at the end of this guide!

A quick chart to figure out which recipes suit the integration you need *(click the numbers to go to the recipe page)*



A. Core Salesforce + QuickBooks Integration Recipes

These replace Intuit's "Salesforce for QuickBooks" solution

This set of 7 recipes provides replacements for the integration scenarios that were covered by the QuickBooks Salesforce Solution. Details can be found on the Workato's Salesforce+QuickBooks site.

* These recipes will be pre-populated in your account if you sign up with your Salesforce ID at the end of this guide!

New customer in QuickBooks creates a new account in Salesforce if it does not exist.
https://www.workato.com/recipes/21043

Customer update in QuickBooks creates or updates Salesforce Account.
https://www.workato.com/recipes/21044

New account in Salesforce creates a new customer in QuickBooks.
https://www.workato.com/recipes/21045

Updated account in Salesforce updates corresponding customer in QuickBooks.
https://www.workato.com/recipes/21046

New closed opportunity in Salesforce creates an invoice in QBO.
https://www.workato.com/recipes/21048

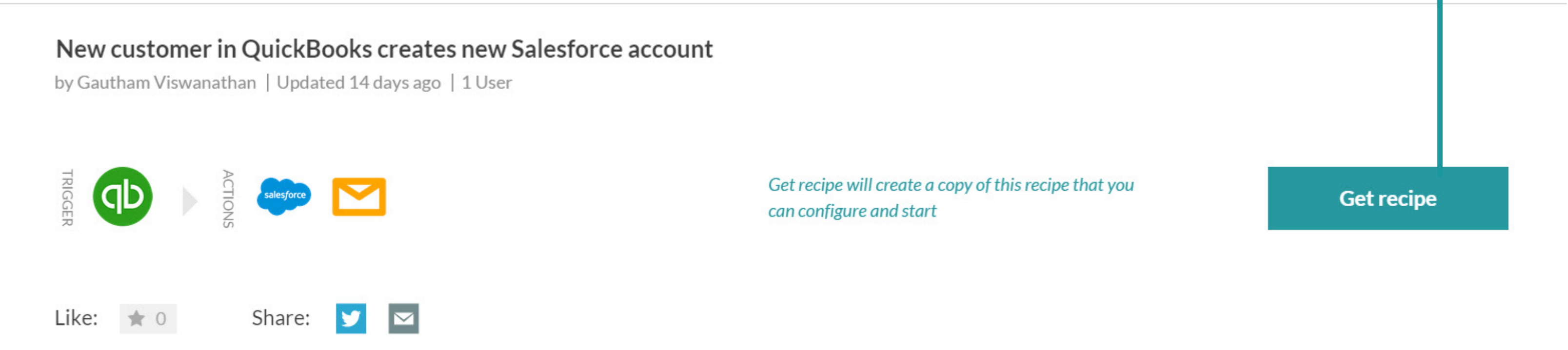
New Salesforce custom invoice is synced to QuickBooks.
https://www.workato.com/recipes/21047

Updated 'Closed Won' opportunity in Salesforce creates an invoice in QBO.
https://www.workato.com/recipes/21049

Tip #1

Recipe Page

Simply 'Get' the recipe and it will be populated into your account, ready to be run!



A-1. New customer in QuickBooks creates a new account in Salesforce if it does not exist

When QuickBooks Online is your master for customer data, and Salesforce is your CRM system, a new customer in QBO must be moved over to Salesforce. If the customer does not exist in Salesforce create it, if it exists then send out an email.

How it works

Open Recipe

Trigger

New customer in QuickBooks > Whenever a new customer is created in QuickBooks trigger this recipe

Actions

1	Search for an account in Salesforce > Check to see if an account with this name exists in Salesforce
2	If Salesforce Search accounts Account ID is not present then do
3	Create account in Salesforce
4	If Salesforce Search accounts Account ID is present then do
5	Send email via Workato

Customization Options

The emails are optional. You can remove the emails. You can change the email recipients. You can change the text of the email.

What you need to use this recipe

No special setup or customization is required to run this recipe. You should have a QuickBooks Online account and a Salesforce account that is API enabled. Add your credentials in the connections section if you are not already connected to the apps.

What these steps do:

Trigger:

When a new customer is created in QBO. QBO does not go back in time to pick up updated accounts, so only accounts created from this point on will be picked up.

Actions:

- Search for a corresponding account in Salesforce
- If account does not exist, add a new account in Salesforce
- If account exists, send out an email notifying people

A-2. Customer update in QuickBooks, creates or updates Salesforce Account

When QuickBooks Online is your master for customer data, and Salesforce is your CRM system, any changes to customers in QBO must be moved over to Salesforce. If the customer does not exist in Salesforce create it, if it exists then update it.

How it works

Open Recipe

Trigger

Updated customer in QuickBooks > Whenever a new customer is created in QuickBooks trigger this re...

Actions

1	Search for an account in Salesforce	Check to see if an account with this name exists in Salesforce
2	If Salesforce Search accounts Account ID is not present then do	If the account is not present, then
3	Create account in Salesforce	Create an account in Salesforce with the info in Quickbooks
4	Send email via Workato	
5	If Salesforce Search accounts Account ID is present then do	
6	Update account in Salesforce	

What these steps do:

Trigger:

When a customer is updated in QBO. QBO does not go back in time to pick up updated accounts, so only accounts changed from this point on will be picked up.

Actions:

- Search for a corresponding account in Salesforce
- If account does not exist, add a new account Salesforce and send out an email notifying people
- If account exists, update the Salesforce account and send out an email notifying people

Customization Options

The emails are optional. You can remove the emails. You can change the email recipients. You can change the text of the email.

What you need to use this recipe

No special setup or customization is required to run this recipe. You should have a QuickBooks Online account and a Salesforce account that is API enabled. Add your credentials in the connections section if you are not already connected to the apps.

A-3. New account in Salesforce creates a new customer in QuickBooks

When Salesforce is your master for customer data, and QuickBooks Online (QBO) is your accounting system, any new customers in Salesforce must be moved over to QBO. If the customer does not exist in QBO create it, if it exists then update it.

How it works

Open Recipe

Trigger

Account is created in Salesforce > When a new account is created in Salesforce

Actions

1 Search for a customer in QuickBooks > Check to see if a corresponding customer exists in Quickb...

2 If QuickBooks Search customers Customer ID is not present then do > If the customer does not exi...

3 Create customer in QuickBooks > Create a new customer in Quickbooks

4 If QuickBooks Search customers Customer ID is present then do

5 Send email via Workato

Customization Options

The emails are optional. You can remove the emails. You can change the email recipients. You can change the text of the email. You can decide to send email when you add a customer and remove the one when you do nothing.

What you need to use this recipe

No special setup or customization is required to run this recipe. You should have a QuickBooks Online account and a Salesforce account that is API enabled. Add your credentials in the connections section if you are not already connected to the apps.

What these steps do:

Trigger:

When a customer is created in Salesforce. Salesforce can go back in time to pick up new accounts, so carefully chose how far back in time you want to go back, this is set under the 'Since' parameter.

Actions:

- Search for a corresponding customer in QBO
- If customer does not exist, add a new customer in QBO
- If customer exists, send out an email notifying people

A-4. Updated account in Salesforce updates corresponding customer in QuickBooks

When Salesforce is your master for customer data, and QuickBooks Online (QBO) is your accounting system, any updated account in Salesforce must be moved over to QBO. If the customer does not exist in QBO send out an email, if it exists then update it.

How it works

Open Recipe

Trigger

Account is updated in Salesforce

Actions

1	Search for a customer in QuickBooks > Search using Salesforce account name
2	If QuickBooks Search customers Customer ID is present then do > A valid Customer ID indicates t...
3	Update customer in QuickBooks
4	If QuickBooks Search customers Customer ID is not present then do
5	Send email via Workato

Customization Options

The emails are optional. You can remove the emails. You can change the email recipients. You can change the text of the email. You can decide to add the customer if not present.

What you need to use this recipe

No special setup or customization is required to run this recipe. You should have a QuickBooks Online account and a Salesforce account that is API enabled. Add your credentials in the connections section if you are not already connected to the apps.

What these steps do:

Trigger:

When an account is updated in Salesforce. Salesforce can go back in time to pick up new accounts, so carefully chose how far back in time you want to go back, this is set under the 'Since' parameter.

Actions:

- Search for a corresponding customer in QBO
- If customer exists, update the customer
- If customer does not exist, send out an email

A-5. New closed opportunity in Salesforce creates an invoice in QBO

When an Opportunity in Salesforce is set as Closed Won, create an invoice for it in QuickBooks Online (QBO) and update the Salesforce opportunity with the QBO invoice number.

How it works

Open Recipe

Trigger

Opportunity is created in Salesforce > When a new opportunity is created in Salesforce

Actions

1	If Salesforce Opportunity created Stage does not equal Closed Won then Finish
2	If Salesforce Opportunity created Next step contains QuickBooks Invoice then Finish
3	Search for a customer in QuickBooks > Get details of account associated with opportunity
4	If QuickBooks Search customers Customer ID is not present then do
5	Create customer in QuickBooks
6	Create invoice in QuickBooks > Create a new invoice with a line item of type "sales item"
7	Update opportunity in Salesforce > Update Salesforce opportunity with Quickbooks invoice num...

Customization Options

You can decide to trigger when the opportunity is updated, not created. You can change the condition from Closed Won to something that matches your business practice. You can check for the customer in QBO, if not present you can give and error and stop or create a customer on the fly. You can add emails at different point.

What you need to use this recipe

No special setup or customization is required to run this recipe. You should have a QuickBooks Online account and a Salesforce account that is API enabled. Add your credentials in the connections section if you are not already connected to the apps.

What these steps do:

Trigger:

When an opportunity is created in Salesforce. Salesforce can go back in time to pick up old opportunities, so carefully chose how far back in time you want to go back, this is set under the 'Since' parameter.

Actions:

- If the stage for the opportunity is set to Closed Won then do the following steps
  - Get the associated Salesforce account; data from this will be used to build the QBO invoice
  - Create an invoice in QBO
  - Update the Salesforce opportunity to capture the QBO invoice number

A-6. New Salesforce custom invoice is synced to QuickBooks

When an Invoice is created in Salesforce, create a corresponding invoice for it in QuickBooks Online (QBO) with invoice line items.

How it works

Open Recipe

Trigger

Object created in Salesforce	Whenever a custom invoice object is created in Salesforce

Actions

1	Get account details in Salesforce	Get the details of account associated with the custom sales in...
2	Search for a customer in QuickBooks	Check to see that the customer exists in QuickBooks
3	If QuickBooks Search customers Display name is not present then do	If the customer doesn't exis...
4	Create customer in QuickBooks	Create the customer in Quickbooks
5	Get related objects from Salesforce	Get the invoice line items related to the invoice
6	Create invoice in QuickBooks	Create new invoice header in QuickBooks
7	For each item in Salesforce Get related objects Invoice item cs do	Get each invoice line in Salesfor...
8	Add line item to invoice in QuickBooks	Add a corresponding invoice line in Quickbooks

Customization Options

You can add email for notification. If you don't find a customer in QBO, you can flag that as an error. You can update the Salesforce invoice with the QBO invoice number.

What you need to use this recipe

You must have defined a custom invoice object with line numbers in Salesforce. You should have a QuickBooks Online account and a Salesforce account that is API enabled. Add your credentials in the connections section if you are not already connected to the apps.

What these steps do:

Trigger:

When an invoice is created in Salesforce. Invoice is a custom object, so we look for new custom objects of type Invoice. Also, Salesforce trigger can go back in time, so carefully chose how far back in time you want to go back, this is set under the 'Since' parameter.

Actions:

- Get the associated Salesforce account, data from this will be used to build the QBO invoice
- Search for the corresponding customer in QBO, if it does not exist, create one on the fly
- Get the invoice lines items (get related objects)
- Create an invoice in QBO
- For each line item in Salesforce invoice, create a corresponding line item in QBO

A-7. Updated 'Closed Won' opportunity in Salesforce creates an invoice in QBO

When an Updated Opportunity in Salesforce is set as Closed Won, create an invoice for it in QuickBooks Online (QBO) and update the Salesforce opportunity with the QBO invoice number.

How it works

Open Recipe

Trigger

Opportunity is updated in Salesforce

Actions

1 If Salesforce Opportunity updated Stage does not equal Closed Won then Finish

2 If Salesforce Opportunity updated Next step contains QuickBooks Invoice ID then Finish

3 Search for a customer in QuickBooks

4 If QuickBooks Search customers Customer ID is not present then do

5 Create customer in QuickBooks

6 Create invoice in QuickBooks

7 Update opportunity in Salesforce

Customization Options

You can change the condition from Closed Won to something that matches your business practice. You can check for the customer in QBO, if not present you can give and error and stop or create a customer on the fly. You can add emails at different point.

What you need to use this recipe

No special setup or customization is required to run this recipe. You should have a QuickBooks Online account and a Salesforce account that is API enabled. Add your credentials in the connections section if you are not already connected to the apps.

What these steps do:

Trigger:

When an opportunity is updated in Salesforce. Salesforce can go back in time to pick up old opportunities, so carefully chose how far back in time you want to go back, this is set under the 'Since' parameter.

Actions:

- If the stage for the opportunity is set to Closed Won then do the following steps
  - Get the associated Salesforce account; data from this will be used to build the QBO invoice
  - Create an invoice in QBO
  - Update the Salesforce opportunity to capture the QBO invoice number

B. Popular SF + QBO Integration Recipes from the Workato Community

There are additional core recipes popular with our customers and broadly applicable to customers integrating Salesforce and QuickBooks. Some of these are:

Trigger "Account Update (SF)". Action "Update Customer if exists (QBO)".
https://www.workato.com/recipes/11485

New QBO Customer if Salesforce Account Value is >0.
https://www.workato.com/recipes/9892

Adicionar campanha Mkt Conteúdo (Add content to a campaign).
https://www.workato.com/recipes/7967

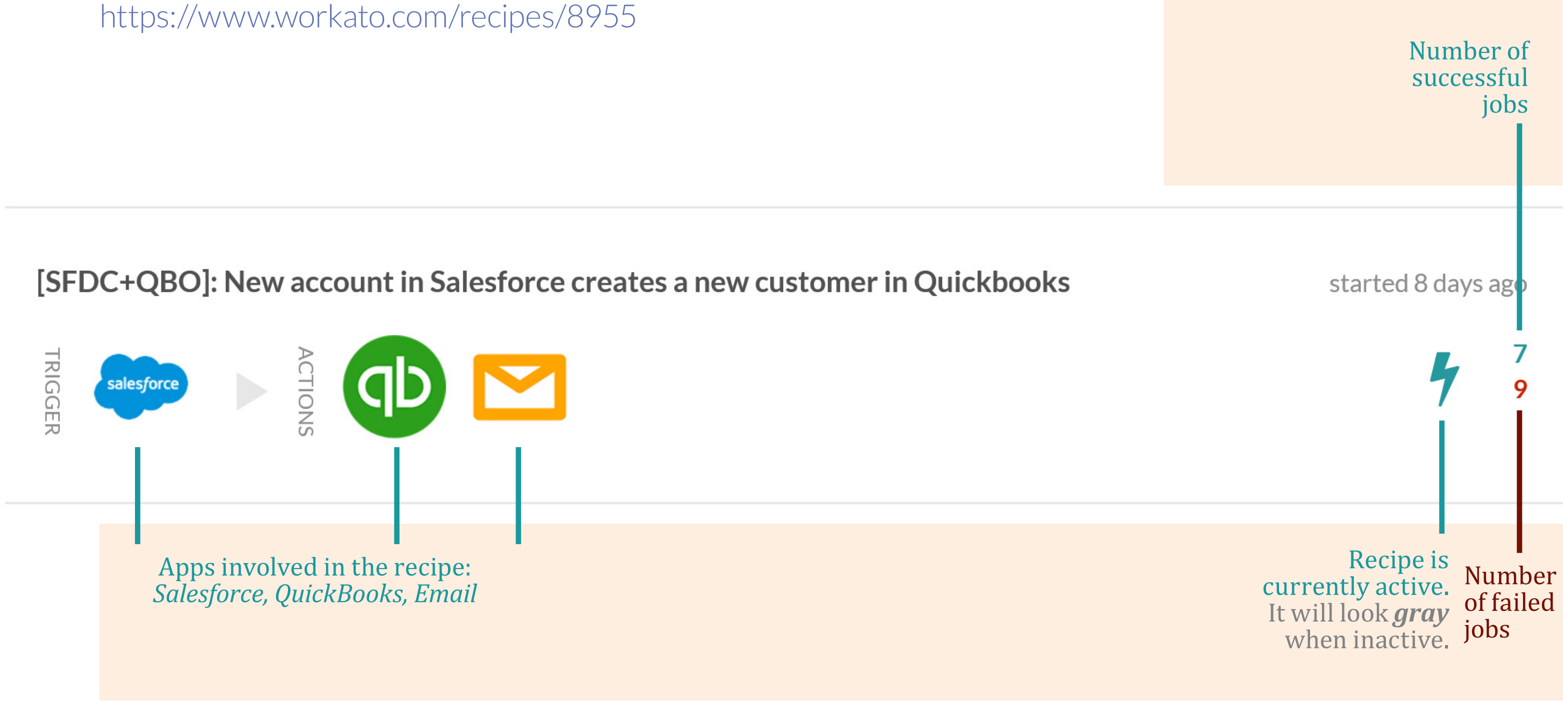
Create a 'Job' in QBO.
https://www.workato.com/recipes/11538

SF Opportunity Signed - New QBS Invoice.
https://www.workato.com/recipes/11405

Create custom inv. 3.
https://www.workato.com/recipes/8955

Tip #2

Here is another tip for navigating around *workato.com*!



B-1. Trigger "Account Update (SF)". Action "Update Customer if exists (QBO)"

When an account is updated in Salesforce, update the QBO customer if one exists.

How it works

Recipe

Open Recipe

Trigger

Account is updated in Salesforce

Actions

1 Search for a customer in QuickBooks

2 If QuickBooks Search customers Customer ID is present then do

3 Update customer in QuickBooks

What these steps do:

Trigger:

When Account is updated in Salesforce. The trigger is set to pick up all entries from the past.

Actions:

- Search for a customer in QuickBooks with the account name from Salesforce
  - If the customer was found in QuickBooks, update a few of the fields (see the recipe step for details)

Customization Options

If the customer does not exist, you may decide to create the customer and send mail. You may decide to select a different 'since' value for the trigger if you don't want to pick up everything from the beginning.

What you need to use this recipe

No special setup or customization is required to run this recipe. You should have a QuickBooks Online and a Salesforce account that is enabled for API. Add your credentials in the connections section if you are not already connected to the apps.

B-2. New QBO Customer if Salesforce Account Value is >0

When the account value of your Salesforce account is greater than 0, create a new customer in QuickBooks.

How it works

Recipe

Open Recipe

Trigger

Account is updated in Salesforce

Actions

1 If Salesforce Account updated Account Value greater than 0 then do

2 Create customer in QuickBooks

What these steps do:

Trigger:
When a customer is updated in Salesforce. Salesforce can go back in time to pick up new accounts, so carefully chose how far back in time you want to go back, this is set under the 'Since' parameter.

Actions:
If account value is greater than 0, add a new customer in QBO

Customization Options

You can check to see if the customer already exists in QBO. You can send out an email.

What you need to use this recipe

No special setup or customization is required to run this recipe. You should have a QuickBooks Online account and a Salesforce account that is API enabled. Add your credentials in the connections section if you are not already connected to the apps.

B-3. Adicionar campanha Mkt Conteúdo (Add content to a campaign)

When a lead is created in Salesforce, add the lead as a member to an existing campaign. This recipe assumes a single known campaign is there and adds new leads to that campaign.

How it works

Recipe

Open Recipe

Trigger

Lead is created in Salesforce

Actions

1 Add campaign member to campaign in Salesforce

Customization Options

You can send out an email.

What you need to use this recipe

No special setup or customization is required to run this recipe. You should have a Salesforce account that is API enabled. Add your credentials in the connections section if you are not already connected to the apps.

What these steps do:

Trigger:
When a lead is created in Salesforce. Salesforce can go back in time to pick up new accounts, so carefully chose how far back in time you want to go back, this is set under the 'Since' parameter.

Actions:
Add lead to a known campaign

B-4. Create a 'Job' in QBO

When an opportunity is Won in Salesforce, create a customer in Quickbooks if the company name has no associated customer or the opportunity name has no associated customer.

How it works

Recipe

Open Recipe

Trigger

Opportunity is updated in Salesforce

Actions

1	If Salesforce Opportunity updated Won is true then do
2	Get account details in Salesforce
3	Get opportunity details in Salesforce
4	Search for a customer in QuickBooks
5	If QuickBooks Search customers Company name does not equal Salesforce ...
6	Create customer in QuickBooks
7	If QuickBooks Search customers Display name does not equal Salesforce ...
8	Create customer in QuickBooks

Customization Options

You can add emails at different points.

What you need to use this recipe

This recipe does not use any custom objects. You should have a QuickBooks Online account and a Salesforce account that is api enabled. Add your credentials in the connections section if you are not already connected to the apps. Go ahead and give it a try!

What these steps do:

Trigger:

When an opportunity is updated in Salesforce. Since is set to 'an hour', which means it will pick up all entries from the past.

Actions:

- If the opportunity stage is Won
  - » Get the account details
  - » Get the opportunity details
  - » Search for a customer in Quickbooks with the Opportunity Account name
  - » if the customer does not exist
    - — create a customer
  - » Search for a customer in Quickbooks with the Opportunity name
  - » if the customer does not exist
    - — create a customer

B-5. SF Opportunity Signed - New QBS Invoice

When an opportunity is signed in Salesforce, create a new invoice for it in Quickbooks.

How it works

Open Recipe

Trigger

Opportunity is updated in Salesforce

Actions

1	If Salesforce Opportunity updated Stage does not equal Signed then Finish
2	Search for objects in Salesforce
3	Get account details in Salesforce
4	Search for objects in Salesforce
5	Search for objects in Salesforce
6	Create invoice in QuickBooks
7	For each item in Salesforce Search objects Opportunity Product do
8	If Foreach Opportunity Product Price Book Entry ID does not equal Salesfor...
9	Search for objects in Salesforce
10	Add line item to invoice in QuickBooks

Customization Options

You can add emails at different points.

What you need to use this recipe

This recipe does not use any custom objects. You should have a QuickBooks Online account and a Salesforce account that is api enabled. Add your credentials in the connections section if you are not already connected to the apps. Go ahead and give it a try!

What these steps do:

Trigger:

When an opportunity is updated in Salesforce. Since is set to 'no limit', which means it will pick up all entries from the past.

Actions:

- If the opportunity stage is not signed, stop
  - » Search for the custom object 'Opportunity Product'
  - » Get the account details
  - » Search for custom object 'Price book entry'
  - » Search for custom object 'User'
  - » Create an Invoice in Quickbooks
  - » Loop through all the 'Opportunity Products'
  - » if the 'Pricebook entry ID' is not present
    - — search for the precook entry again
    - — add a line item to the invoice

B-6. Create custom inv. 3

When a custom object (invoice) is updated in Salesforce, progressively update its Notes field based on its status, and conditionally create a corresponding invoice for it in Quickbooks Online (QBO).

How it works

Recipe

Open Recipe

Trigger

Object updated in Salesforce

Actions

1 Update object in Salesforce
2 If Salesforce Object updated Status does not equal Sent then Finish
3 Update object in Salesforce
4 If Salesforce Object updated Quickbooks Invoice Id does not equal null then Finish...
5 Update object in Salesforce
6 Get account details in Salesforce
7 Create invoice in QuickBooks
8 Update object in Salesforce

Customization Options

You can check for the customer in QBO, if not present you can give and error and stop or create a customer on the fly. You can add emails at different point.

What you need to use this recipe

You must have the same customizations to salesforce that this recipe has. You should have a Quickbook Online account and a Salesforce account that is api enabled. Add your credentials in the connections section if you are not already connected to the apps. Go ahead and give it a try!

What these steps do:

Trigger:

When a custom object is updated in Salesforce. Salesforce can go back in time to pick up old opportunities, so carefully chose how far back in time you want to go back, this is set under the 'Since' parameter.

Actions:

- If the invoice is not sent - stop
- Otherwise set it's step as 1
- If the invoice has been sent to quickbooks - stop
- Otherwise set it's step as 2
- Create an invoice in QBO
- Get account details from Salesforce to create an invoice in Quickbooks
- Update the salesforce invoice with the Quickbooks invoice id

Get Started Now.

Sign up below and get going with the Salesforce + QuickBooks solution in minutes!

Sign Up with salesforce

or, Sign In if you already have a Workato account.