



QB Connect Pro User Guide

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Introduction

The document will guide you through the process of integrating the Cloud Builders QB Connect application with your Salesforce org. It is broken into three sections: Installation, Configuration and the User Manual.

You may email any support questions to support@cloud-builders.com or call us at: 480-382-1372

Prerequisites

Enable Quote:

When attempting to install the QB Connect integration App, you might get the error "Missing Organization Feature: Quotes" if the Quotes is not enabled. You will need to have administrative rights to your Salesforce account to make this change.

Go to Salesforce, and after you sign in follow these steps:

1. Click "Setup"
2. Under App Setup or Build section, Click "Customize"
3. Click "Quotes"
4. Click "Settings"
5. Click the checkbox to "Enable Quotes"
6. Click "Save"

Quickbooks app and keys:

When connecting the QB Connect app to Quickbooks online, you need to create an app for your Quickbooks account and get client Id, client secret and add a redirect Url in that app.

Go to <https://developer.intuit.com/app/developer/dashboard> and login using your quickbooks online credentials.

Click on Create new app link and give a suitable name and select Accounting check as in below screenshot.

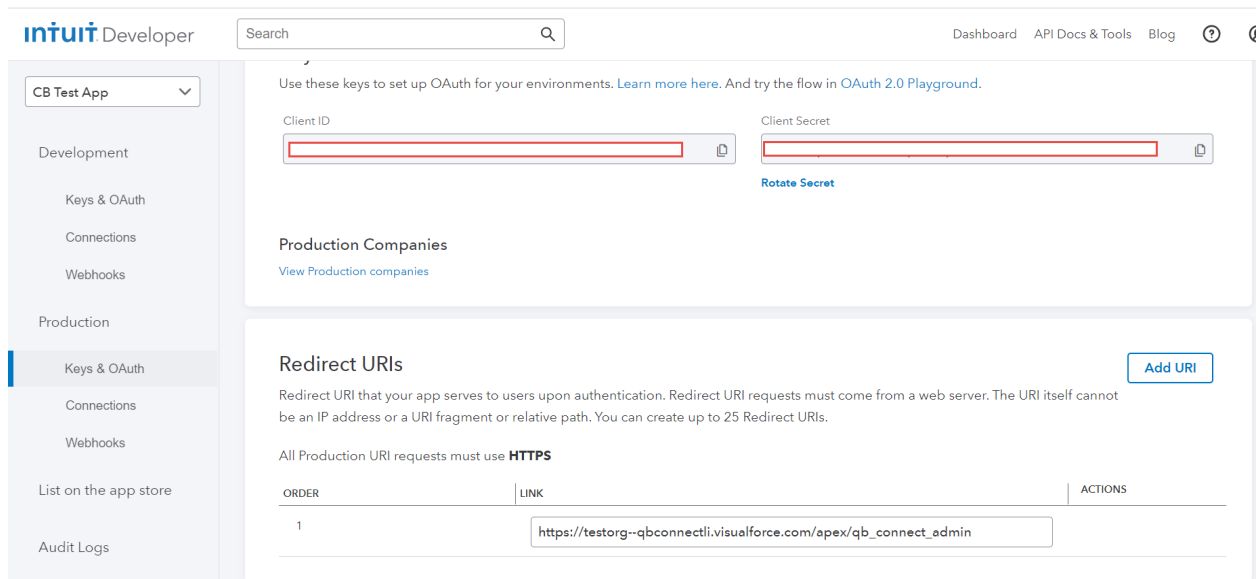
Click Keys and Oauth from the left panel.

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As you complete the profile and other details needed, you should see client Id and client secret and Add redirect Urls. Save the client Id and client secret to be used later and add below redirect Url using Add URI button and replacing YOUR_SALESFORCE_INSTANCE_NAME with actual org instance name.

https://<YourDomain>--qbconnectli.visualforce.com/apex/qb_connect_admin

For example : https://testorg--qbconnectli.visualforce.com/apex/qb_connect_admin if your salesforce org url is: <https://testorg.lightning.force.com/>



The screenshot shows the Intuit Developer console interface. On the left is a sidebar with a dropdown menu set to 'CB Test App'. Below it are sections for 'Development' (Keys & OAuth, Connections, Webhooks) and 'Production' (Keys & OAuth, Connections, Webhooks, List on the app store, Audit Logs). The main area has a search bar and navigation links for Dashboard, API Docs & Tools, and Blog. The primary content area is titled 'Use these keys to set up OAuth for your environments. Learn more here. And try the flow in OAuth 2.0 Playground.' It contains fields for 'Client ID' and 'Client Secret', both with copy icons. A 'Rotate Secret' link is below the secret field. Below this is a 'Production Companies' section with a 'View Production companies' link. The bottom section is 'Redirect URIs', which includes an 'Add URI' button and explanatory text: 'Redirect URI that your app serves to users upon authentication. Redirect URI requests must come from a web server. The URI itself cannot be an IP address or a URI fragment or relative path. You can create up to 25 Redirect URIs. All Production URI requests must use HTTPS'. A table below shows one entry with 'ORDER' 1 and 'LINK' https://testorg--qbconnectli.visualforce.com/apex/qb_connect_admin.

ORDER	LINK	ACTIONS
1	https://testorg--qbconnectli.visualforce.com/apex/qb_connect_admin	

Installation

Installing the Package in Salesforce

1 - Download and Install the App

Retrieve the [package](#) and install it using the following URL:

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t2M000002uyKY> for Production and

<https://test.salesforce.com/packaging/installPackage.apexp?p0=04t2M000002uyKY> for Sandbox.

2 - Connect QuickBooks

In the QB Connect App, Go to the QB Connect Admin Tab. Click Connect to Quickbooks button

 QB CONNECT SETUP

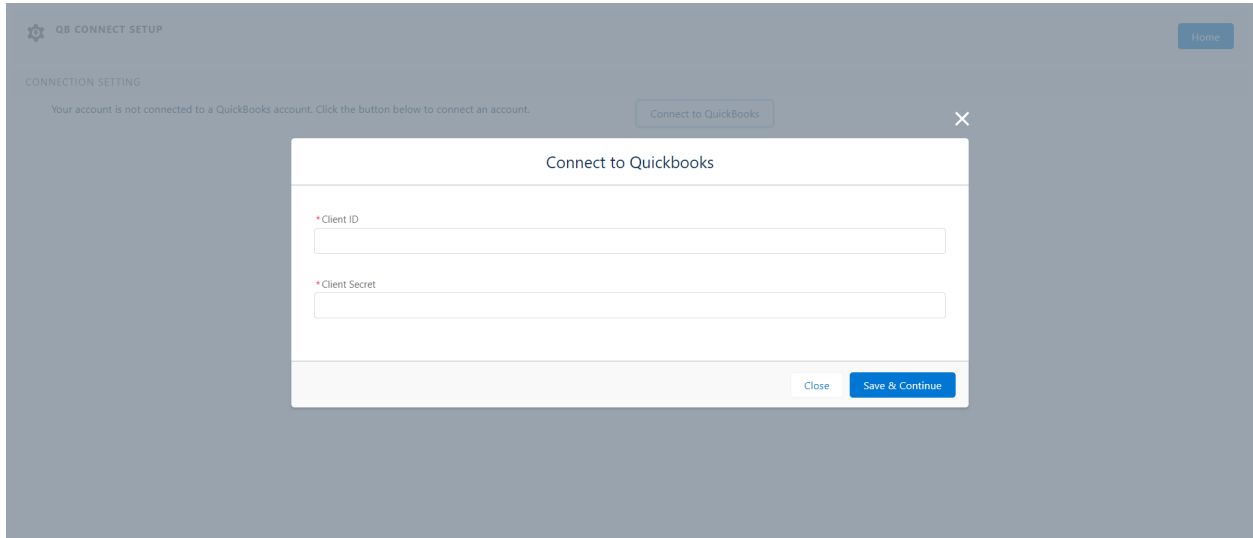
CONNECTION SETTING

Your account is not connected to a QuickBooks account. Click the button below to connect an account.

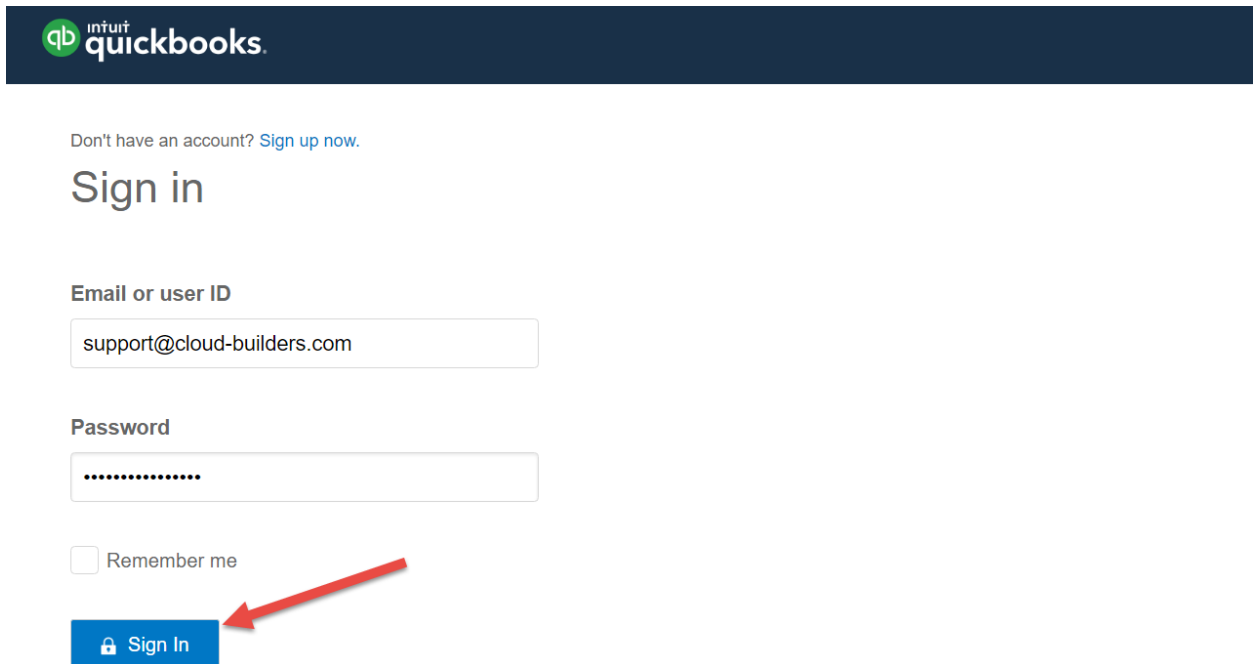
Connect to QuickBooks

3 - Enter Quickbooks Login Details

Enter the client Id and Client secret received from creating an app for your Quickbooks online account.(see prerequisites for more details). Then click the Save & Continue button.



Enter the username and password for your Quickbooks Account on the next screen.



4 - Authorize Access in Quickbooks

Authorize the process by clicking Authorize button.

Authorize the Sharing of Your Data Between QB Connect and Intuit



This completes the connection between your Quickbooks account and Salesforce. You now will be automatically redirected to the setup page.

QB Connect Admin Page

 QB CONNECT SETUP Home

CONNECTION SETTING

Your account is connected to a QuickBooks account. Click below to Disconnect. Disconnect QuickBooks

CUSTOM FIELDS MAPPING

Click here to map custom fields in QuickBooks to Salesforce fields. Map Fields

INVOICE/ESTIMATE LINE ITEM TOTAL PRICE FIELD SETTING

Select the field that you want to sync to Total Price field for Invoice/Estimate Line Item.

Select Invoice Line Item Total Price Field:
None

Select Quote Line Item Total Price Field:
None

Save

OPPORTUNITY STAGES SYNCHRONIZATION

Set the opportunity stages in which data updates from Salesforce to QuickBooks. Select Stages

SYNC ALL TAX CODES (QUICKBOOKS TO SALESFORCE)

Fetch all tax codes from Quickbooks to Salesforce. Sync Now

EXISTING DATA SYNCING (SALESFORCE TO QUICKBOOKS)

Sync All existing Data from Salesforce to QuickBooks (i.e. account, opportunity, quote, invoice and product data related to syncing stage opportunities). Start Sync

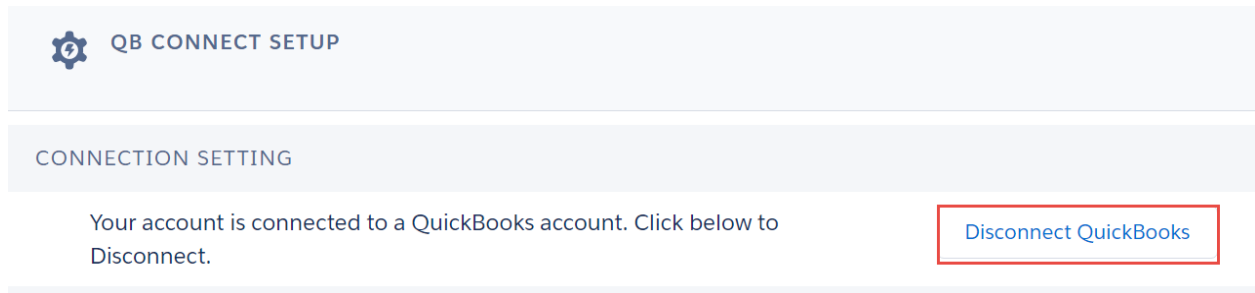
EXISTING DATA SYNCING (QUICKBOOKS TO SALESFORCE)

Sync All existing Data from QuickBooks to Salesforce (i.e. invoice and payment data related to opportunity already syncing to QB). Start Sync

Disconnecting QuickBooks

How to disassociate your QuickBooks account with the application. ***This is not part of the installation process, this is for uninstallation only.***

Go to QB Connect Admin Tab. Click Disconnect QuickBooks button and you will be disconnected and now you can connect to another QB account by following the same QB connect process.



5 - Mapping QuickBooks fields to Salesforce

QB Connect allows for up to three custom fields created in Quickbooks mapping to Salesforce fields.

6 - Invoice/Estimate total price field setting

This section on Qb Connect Setup page allows selecting currency fields from the dropdown for invoice and quote line item sync and the selected field will be synced as total price field for Quickbooks. This is helpful for the customers that want to use any custom currency field or the fields other than TotalPrice from invoice/quote line item to be synced to quickbooks. If nothing is selected, "Total Price" standard field syncs to quickbooks.

7 - Opportunity Stages Synchronization

QB Connect allows for setting the opportunity stages in which data updates from Salesforce to QuickBooks automatically. Sync existing data also works based on this setting and the records related to opportunities with stages selected here will sync.

8 - Sync Existing Data

Once you are connected to QB, you can sync All existing Salesforce Products, Accounts, Invoices, Quotes and Opportunity to Quickbooks or Invoices and Payments data from Quickbooks to Salesforce that is related to syncing opportunities (Opportunities that has stage name selected in Opportunity Stages Synchronization). To do this, press the related **Start Sync** button QB Connect Admin page. It will take a few minutes to sync all data.

9 - Currency Details

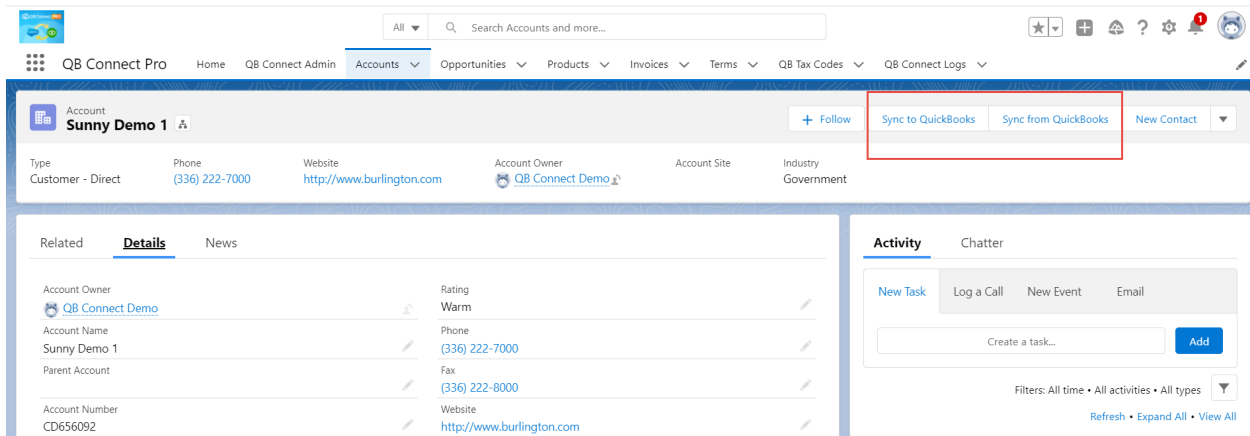
This section is for information purposes and provides information about the currency used in connected quickbooks accounts and if multi currency is enabled or not to avoid any currency mismatch between salesforce and quickbooks.

10 - Adding Buttons, Fields to SF Page Layouts

These steps allow you to add Quickbooks data fields to Salesforce page layouts as well as adding custom buttons to sync data.

10A - Account page layout

- Add Sync to QuickBooks, Sync from QuickBooks button/action on Account page layout.
- Add a section on page layout, name it as QB Details.
- Add QB ID, QB Last Sync Date, QB Error, Email Address fields on QB Details section on Account page layout.



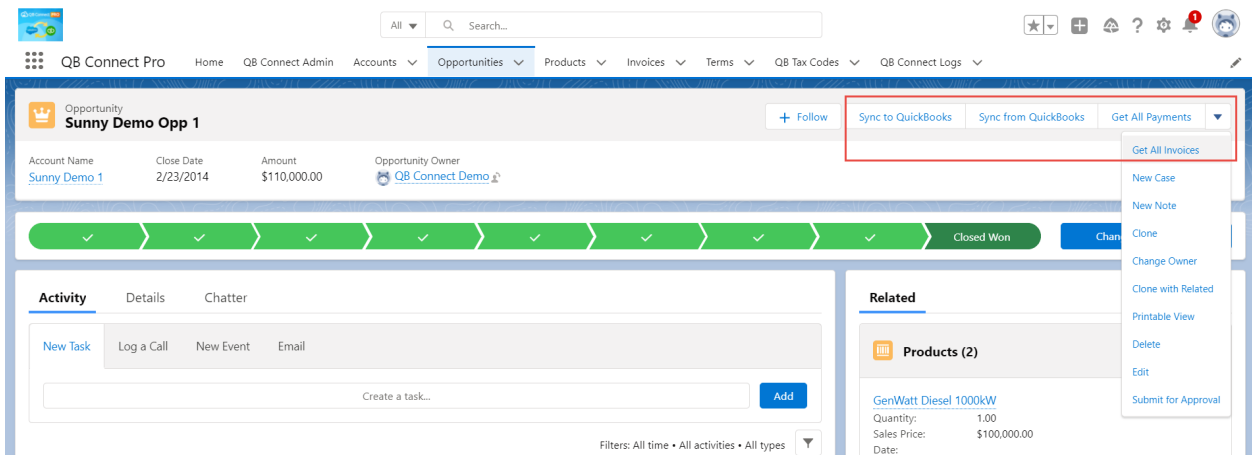
The screenshot displays the Salesforce interface for an account named 'Sunny Demo 1'. The top navigation bar includes 'QB Connect Pro', 'Home', 'QB Connect Admin', and a dropdown menu for 'Accounts'. The account details section shows fields for Type (Customer - Direct), Phone ((336) 222-7000), Website (http://www.burlington.com), Account Owner (QB Connect Demo), Account Site, and Industry (Government). Below this, the 'Details' tab is active, showing a table of account information. A red box highlights the 'Sync to QuickBooks' and 'Sync from QuickBooks' buttons in the top right corner of the account header.

Related	Details	News
Account Owner	Rating	
QB Connect Demo	Warm	
Account Name	Phone	
Sunny Demo 1	(336) 222-7000	
Parent Account	Fax	
	(336) 222-8000	
Account Number	Website	
CD656092	http://www.burlington.com	

▼ QB Details	
Email Address ⓘ	QB Last Sync Date ⓘ 8/17/2016 5:56 AM
QB ID ⓘ 413479501-952	QB Error ⓘ
Billing Address 525 S. Lexington Ave, Burlington, NC 27215 USA	Shipping Address
Customer Priority	SLA Silver
SLA Expiration Date 9/11/2015	SLA Serial Number 5367
Number of Locations 6	Upsell Opportunity Maybe
Active	

10B - Opportunity page layout

- Add Sync to QuickBooks, Sync from QuickBooks, Get All Payments, Get All Invoices buttons/actions on Opportunity page layout.
- Add a section on page layouts, name it as QB Details.
- Add QB ID, QB Last Sync Date, QB Error, QB Balance, QB Auto Sync, QB Grand Total, QB Total Payment, QB Tax Percent fields on QB Details section on opportunity page layout as shown in below screen.
- Add Payments, Invoices related lists to opportunity page layout.



The screenshot displays the 'Opportunity' page for 'Sunny Demo Opp 1' in the 'QB Connect Pro' application. The top navigation bar includes 'Home', 'QB Connect Admin', 'Accounts', 'Opportunities', 'Products', 'Invoices', 'Terms', 'QB Tax Codes', and 'QB Connect Logs'. The main header shows the opportunity name, account name, close date, amount, and owner. A red box highlights a set of buttons: 'Sync to QuickBooks', 'Sync from QuickBooks', 'Get All Payments', and 'Get All Invoices'. Below the header is a progress bar with green checkmarks and a 'Closed Won' status. The 'Activity' tab is active, showing a 'New Task' form. The 'Related' section displays a list of products, including 'GenWatt Diesel 1000kW'. The bottom of the page shows filters for 'All time', 'All activities', and 'All types'.

QB Details	
QB Auto Sync ⓘ ☒	QB ID ⓘ 413479501-953
QB Tax Percent ⓘ	QB Last Sync Date ⓘ 1/17/2017 9:44 PM
QB Grand Total \$235,000.00	QB Error ⓘ
QB Total Payment ⓘ \$0.00	
QB Balance \$235,000.00	
Order Number 645612	Main Competitor(s) John Deere
Current Generator(s) John Deere	Delivery/Installation Status Yet to begin
Tracking Number	

10C - Quote page layout

- Add Sync to QuickBooks button on Quote page layout.
- Add a section on page layout, name it as QB Details.
- Add QB ID, QB Last Sync Date, QB Error, QB Estimate Status, QB Txn Date, QB Tax Percent and other fields on QB Details section on Quote page layout as shown in below screen.

[New Contact](#)
[New Opportunity](#)
[New Case](#)

Opportunity Name: Dickenson Mobile Generators
 Account Name: Dickenson plc
 Grand Total: \$210,000.00

[Approved](#)
[Rejected](#)
[Presented](#)
[Accepted](#)
[Denied](#)
[✓ Mark Status](#)

[Add Products](#)
[Edit Products](#)

QUANTITY	SUBTOTAL
2.00	\$200,000.00
2.00	\$10,000.00

[View All](#)

ACTIVITY

[New Event](#)
[New Task](#)
[Log a Call](#)

Subject

[New Lead](#)
[Edit](#)
[Delete](#)
[Create PDF](#)
[Email Quote](#)
[Start Sync](#)
[Sync to QuickBooks](#)

Filter Timeline

Next Steps

 test3213424

[Dickenson Mobile Generators](#)

Account Name: Dickenson plc

QB Details

QB Balance \$210,000.00	QB ID 413479501-140
QB Copy Line Item Description From Quote Line Items	QB Last Sync Date 1/13/2017 10:17 AM
QB Estimate/Invoice # 1091	QB Error Business Validation Error: We're sorry, QuickBooks encountered an error while calculating tax. Try reselecting the tax rate or reentering the product/service item and saving the form again. https://help.quickbooks.intuit.com&locale=en_US Please click here for more information

10D - Product page layout

- Add Sync to QuickBooks button on Product page layout.
- Add a section on page layout, name it as QB Details.

- Add QB ID, QB Last Sync Date, QB Error fields on QB Details section on product page layout as shown in below screen.

New Contact
New Opportunity
New Case
▼

New Lead

Edit

Delete

Clone

Sync to QuickBooks

Active
☒

Product Family

QB ID i

413479501-1551

QB Error i

Installation: Industrial - High

Product Name

Installation: Industrial - High

Product Code

IN7080

Active
☒

Product Family

QB Details

QB COGS/Purchase Amount i

QB Purchase Description i

QB Quantity On Hand i

Created By

QB Connect, 8/15/2016 11:36 PM

QB ID i

413479501-1551

QB Error i

QB Last Sync Date i

8/25/2016 1:26 AM

Last Modified By

QB Connect, 8/25/2016 1:26 AM

Quickbooks Tax Set up

If you want to use **Tax** feature in Quickbooks transactions, you have to login to QuickBooks and click Set Up Sales Tax button in Quickbooks for the first time so that Tax feature is enabled, then Tax values will be considered else Tax values will be ignored.

Login To QB -> Taxes -> Sales Tax -> Set-up Sales Tax

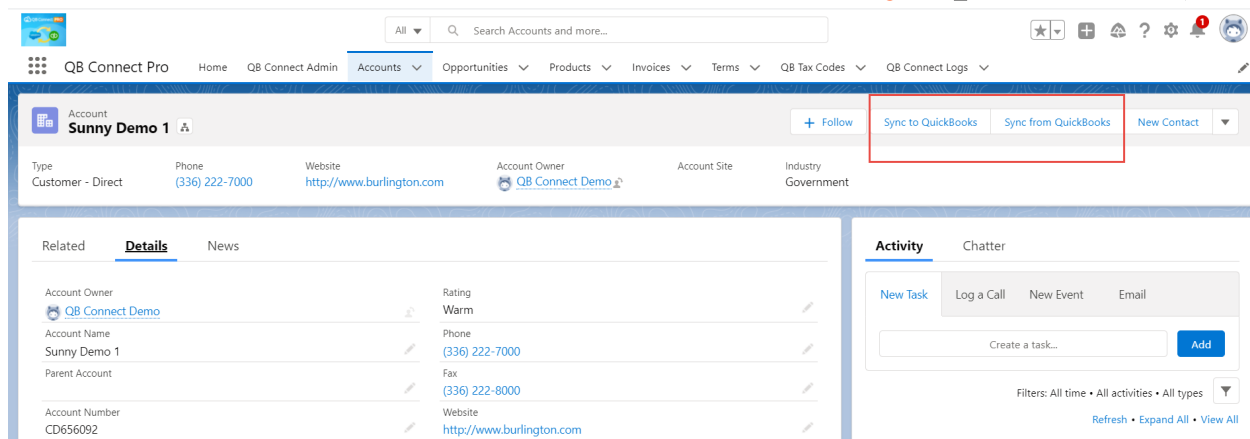
Sync SF records to QB

Sync Limit

With the free version of QB Connect app, you can sync only 20 Invoice/Estimates per month. Paid version of this app has no limits and you can sync any number of records.

Account Sync

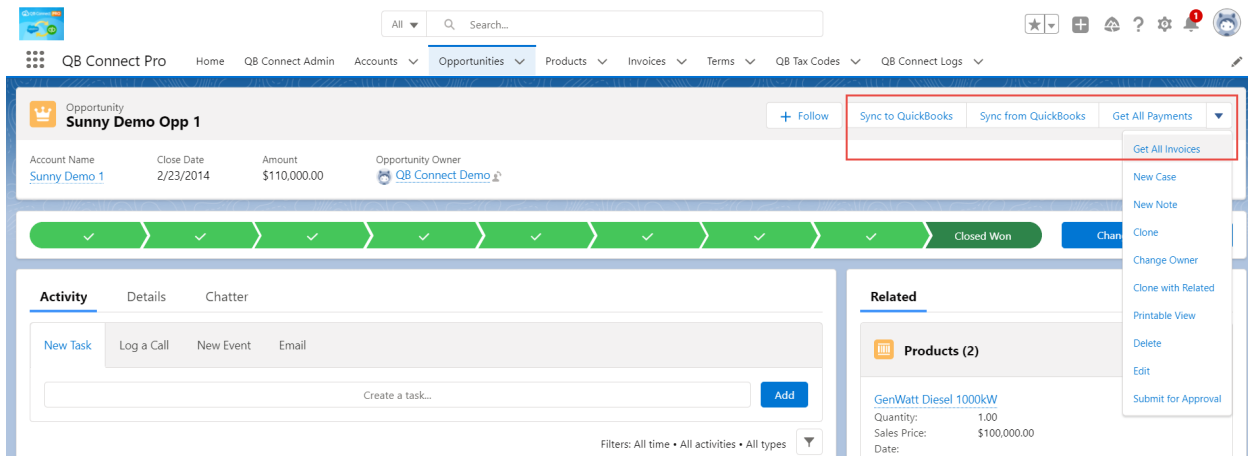
- **Automatic Sync** – Account can be automatically synced to QB if it has QB ID field value. So Account will never sync to QB when Account is inserted in SF. It will sync only when it is updated and it's QB Id field is not Null/Blank.
- **Manual Sync** –
 - Use Sync to Quickbooks button to create/update Customers in QB.
 - Use Sync from Quickbooks button to update Customers in SF from QB.



The screenshot displays the QB Connect Pro web interface. At the top, there's a navigation bar with tabs like Home, QB Connect Admin, Accounts, Opportunities, Products, Invoices, Terms, QB Tax Codes, and QB Connect Logs. Below this, the main header shows the account name 'Sunny Demo 1' with a '+ Follow' button and two buttons: 'Sync to QuickBooks' and 'Sync from QuickBooks', which are highlighted with a red box. The account details section includes fields for Type (Customer - Direct), Phone ((336) 222-7000), Website (http://www.burlington.com), Account Owner (QB Connect Demo), Account Site, and Industry (Government). Below the details, there's a 'Details' tab with a table of account information, including Account Owner, Account Name, Parent Account, Account Number, Rating, and various contact details. On the right, there's an 'Activity' section with a 'New Task' button and a 'Create a task...' input field.

Opportunity Sync

- Automatic Sync – Opportunity will automatically sync to QB if it's stage is in syncing stages and Quickbooks Auto Sync(By default True) is True. If you don't want to Sync an Opportunity which has stage matching syncing stages, you can uncheck this field.
- Manual Sync –
 - Use Sync to Quickbooks button to create/update Jobs in QB.
 - Use Sync from Quickbooks button to update Jobs in SF from QB.



Get All Payments

Use this button to fetch all payments made against this opportunity/Job in Quickbooks in salesforce.

Get All Invoices

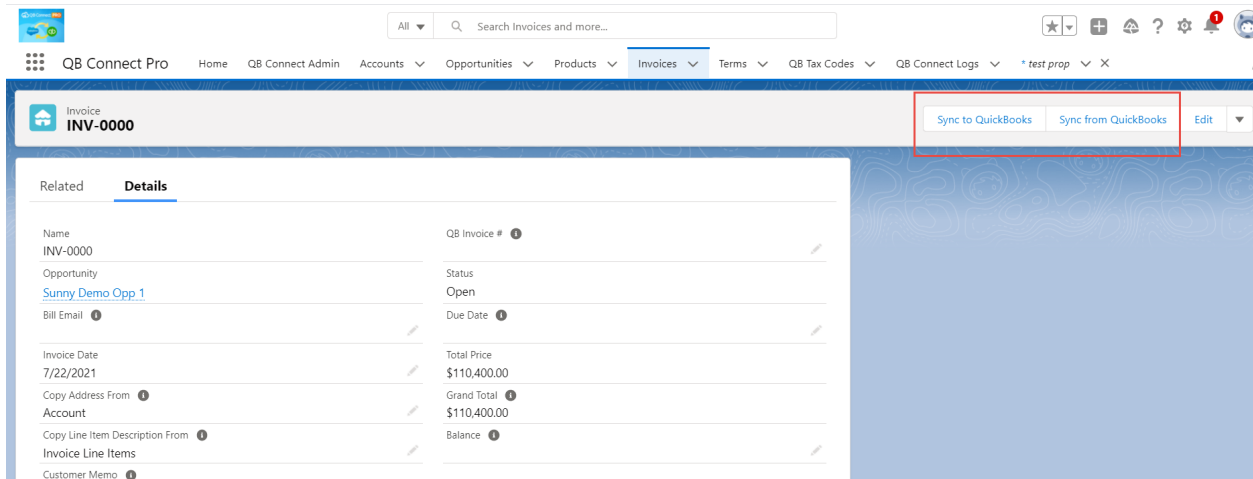
Use this button to fetch all invoices created/updated against this opportunity/Job in Quickbooks in salesforce.

Invoice Sync

All the available products below opportunity will be added to Invoice line item when we create Invoice below that Opportunity. We can add or update existing invoice line items from Invoice related list using the New/Edit button. Use Copy Address from field to define billing and shipping address for invoice.

- Automatic Sync –Invoice will automatically sync to QB if it's Opportunity stage is in syncing stages and Opportunity Quickbooks Auto Sync is True.

- Manual Sync –
 - Use Sync to Quickbooks button to create/update Invoice in QB.
 - Use Sync from Quickbooks button to update Invoice in SF from QB.



QB Connect Pro Home QB Connect Admin Accounts Opportunities Products Invoices Terms QB Tax Codes QB Connect Logs test prop X

Invoice INV-0000

Sync to QuickBooks Sync from QuickBooks Edit

Related Details

Name INV-0000 QB Invoice # 1

Opportunity Sunny Demo Opp 1

Status Open

Bill Email 1 Due Date 1

Invoice Date 7/22/2021 Total Price \$110,400.00

Copy Address From 1 Grand Total 1 \$110,400.00

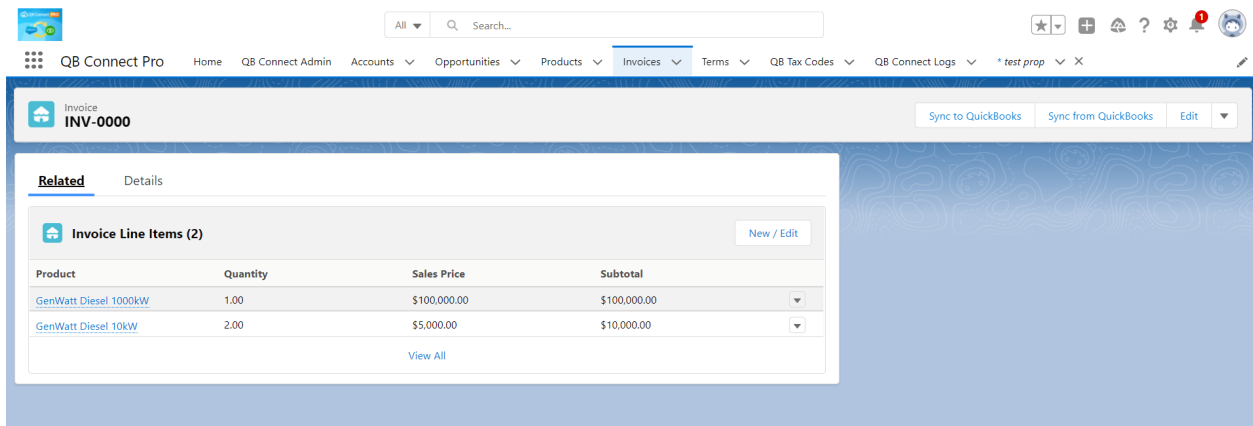
Account

Copy Line Item Description From 1 Balance 1

Invoice Line Items

Customer Memo 1

New/Edit button -



QB Connect Pro Home QB Connect Admin Accounts Opportunities Products Invoices Terms QB Tax Codes QB Connect Logs test prop X

Invoice INV-0000

Sync to QuickBooks Sync from QuickBooks Edit

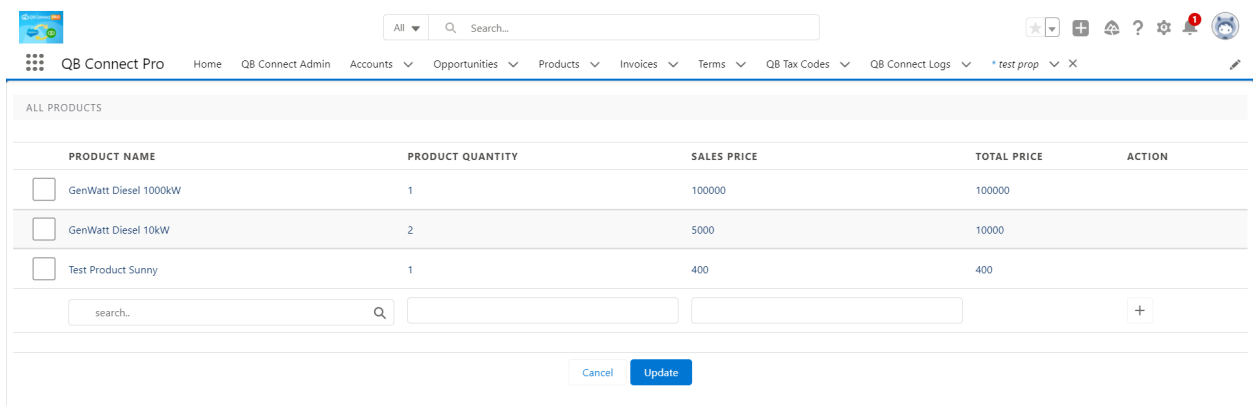
Related Details

Invoice Line Items (2) New / Edit

Product	Quantity	Sales Price	Subtotal
GenWatt Diesel 1000kW	1.00	\$100,000.00	\$100,000.00
GenWatt Diesel 10kW	2.00	\$5,000.00	\$10,000.00

View All

Edit or add new invoice line items-



QB Connect Pro Home QB Connect Admin Accounts Opportunities Products Invoices Terms QB Tax Codes QB Connect Logs test prop X

ALL PRODUCTS

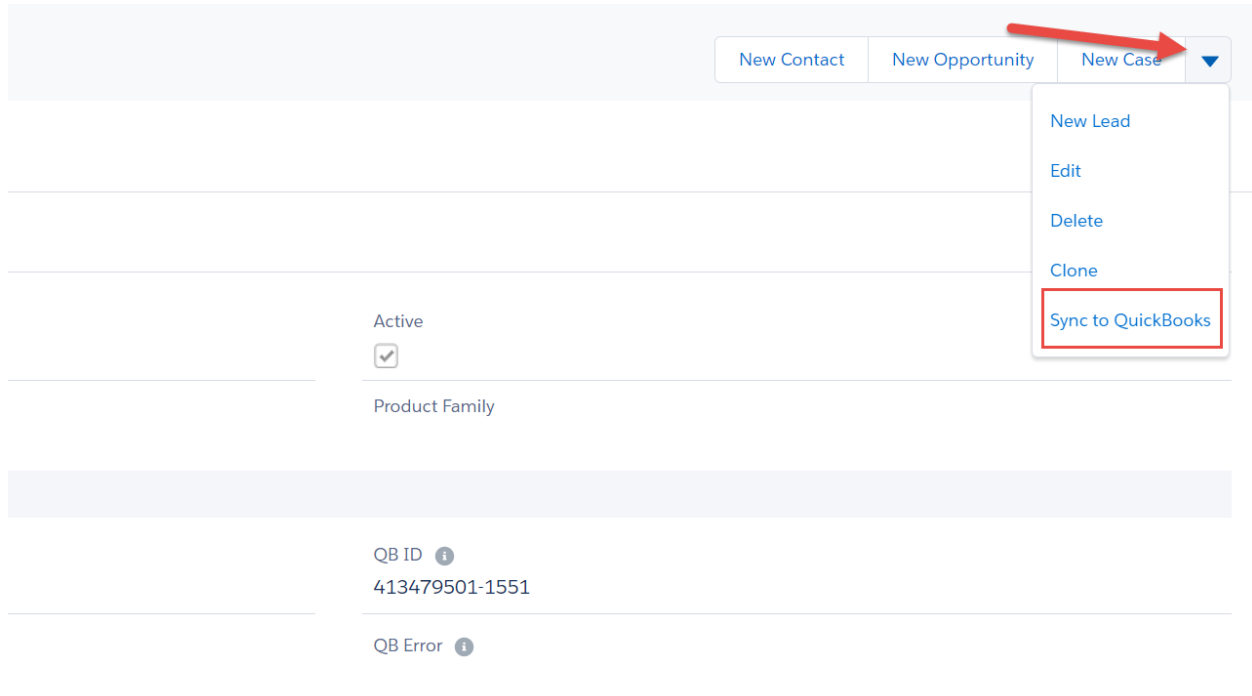
PRODUCT NAME	PRODUCT QUANTITY	SALES PRICE	TOTAL PRICE	ACTION
☐ GenWatt Diesel 1000kW	1	100000	100000	
☐ GenWatt Diesel 10kW	2	5000	10000	
☐ Test Product Sunny	1	400	400	

search... Q

Cancel Update

Product Sync

- Automatic Sync – Products will automatically sync to QB when the quote line item or invoice line item using this product is synced to QB.
- Manual Sync – Use Sync to Quickbooks button to create/update Items in QB.

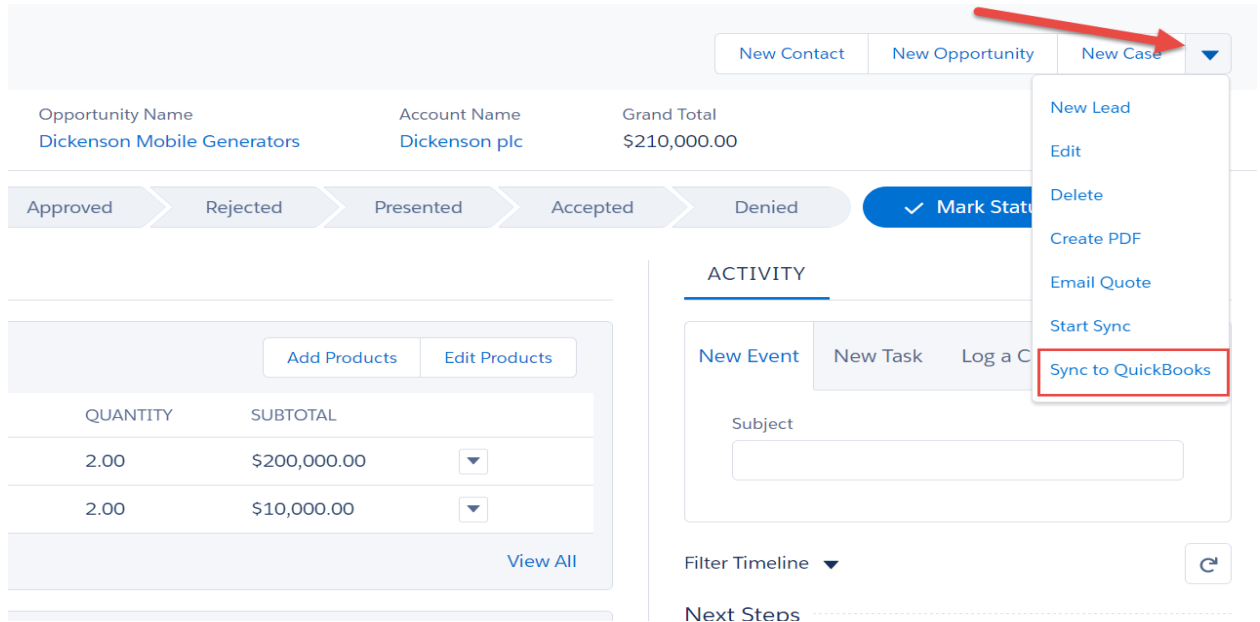


Active	Product Family	QB ID	QB Error
☒		413479501-1551	

Quote Sync

Please note that you can use Quote both as invoice and estimate. Select invoice or estimate in QB Object type field. By default estimate is selected. There should be atleast 1 quote line item to successfully sync quote.

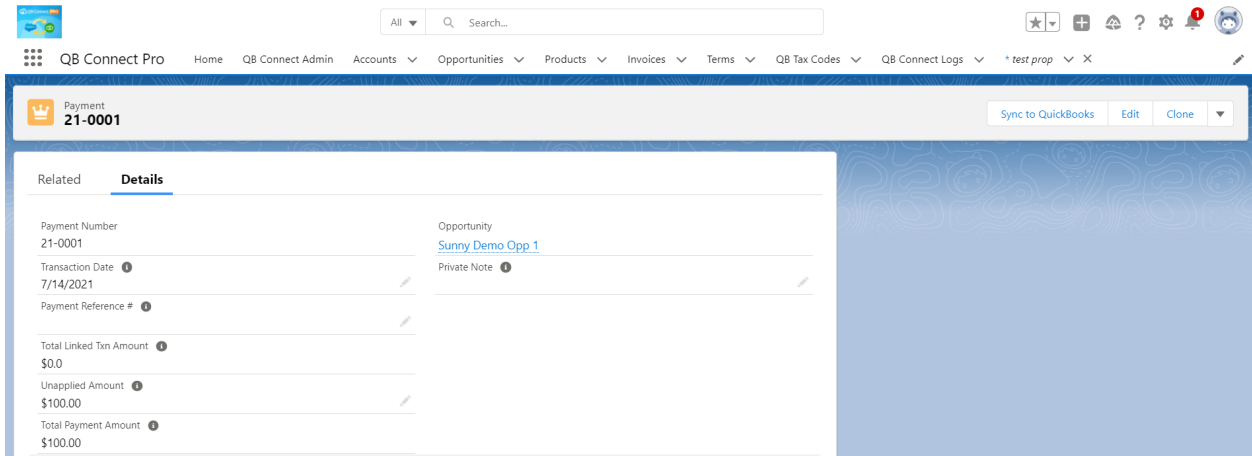
- Automatic Sync – Estimates are not synced automatically. If Quote is used as invoice, it will automatically sync to QB if it's Opportunity is in syncing stages and Opportunity Quickbooks Auto Sync is True.
- Manual Sync – Use Sync to Quickbooks button to create/update Estimates/Invoice in QB



The screenshot shows the CloudBuilders interface. At the top, there are buttons for 'New Contact', 'New Opportunity', and 'New Case'. A red arrow points to the 'New Case' button, which has a dropdown menu open. The dropdown menu contains the following options: 'New Lead', 'Edit', 'Delete', 'Create PDF', 'Email Quote', 'Start Sync', and 'Sync to QuickBooks'. The 'Sync to QuickBooks' option is highlighted with a red box. Below the buttons, there is a table with columns for 'Opportunity Name', 'Account Name', and 'Grand Total'. The table contains one row with the following data: 'Dickenson Mobile Generators', 'Dickenson plc', and '\$210,000.00'. Below the table, there are tabs for 'Approved', 'Rejected', 'Presented', 'Accepted', and 'Denied'. A 'Mark Status' button is also visible. To the right of the table, there is an 'ACTIVITY' section with tabs for 'New Event', 'New Task', and 'Log a C'. Below the tabs, there is a 'Subject' input field. At the bottom of the 'ACTIVITY' section, there is a 'Filter Timeline' dropdown and a 'Next Steps' section.

Payment Sync

You can create payment records in salesforce and create related linked txn lines to map this payment to invoice or pay as unapplied amount(cash deposit) in salesforce and then use [Sync to Quickbooks](#) button to sync the same to QB.

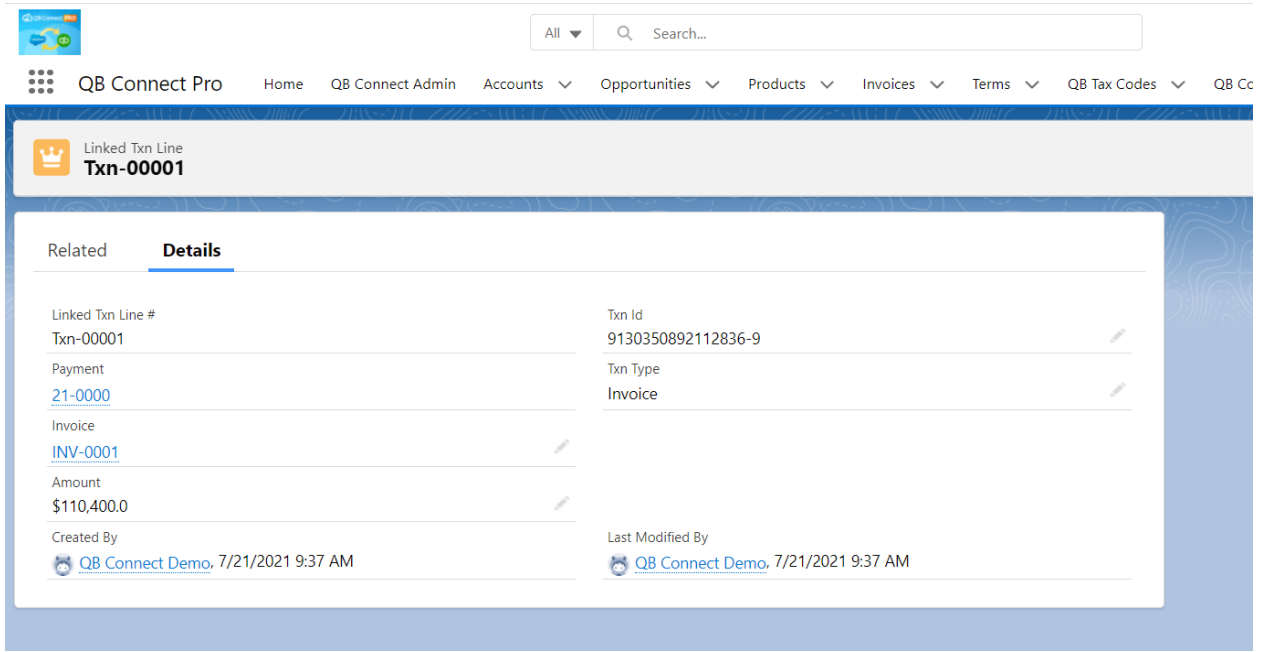


The screenshot shows the Salesforce interface. At the top, there is a navigation bar with the following items: 'QB Connect Pro', 'Home', 'QB Connect Admin', 'Accounts', 'Opportunities', 'Products', 'Invoices', 'Terms', 'QB Tax Codes', 'QB Connect Logs', and a search bar. Below the navigation bar, there is a 'Payment' record with the ID '21-0001'. The record has a 'Sync to QuickBooks' button, an 'Edit' button, and a 'Clone' button. The 'Details' tab is selected, showing the following information:

Related	Details
Payment Number	21-0001
Transaction Date	7/14/2021
Payment Reference #	
Total Linked Txn Amount	\$0.0
Unapplied Amount	\$100.00
Total Payment Amount	\$100.00

On the right side of the 'Details' tab, there is a 'Private Note' section with a text area for notes.

Linked Txn lines-



The screenshot displays the QB Connect Pro web application. At the top, there is a navigation bar with a search bar and a menu containing links like Home, QB Connect Admin, Accounts, Opportunities, Products, Invoices, Terms, QB Tax Codes, and QB Connect. Below the navigation bar, a header section shows a crown icon and the text 'Linked Txn Line Txn-00001'. The main content area has two tabs: 'Related' and 'Details', with 'Details' being the active tab. The details are organized into two columns. The left column contains fields for 'Linked Txn Line #' (Txn-00001), 'Payment' (21-0000), 'Invoice' (INV-0001), 'Amount' (\$110,400.0), and 'Created By' (QB Connect Demo, 7/21/2021 9:37 AM). The right column contains fields for 'Txn Id' (9130350892112836-9), 'Txn Type' (Invoice), and 'Last Modified By' (QB Connect Demo, 7/21/2021 9:37 AM). Each field has a small edit icon to its right.

Process Schedulers

Quickbooks Invoice/Payment Schedulers

These jobs are responsible for fetching all Payments and Invoices from Quickbooks and update the same in Salesforce. You can select the duration to auto run these schedulers from Quickbooks setup page and then clicking save button to start the schedulers.

Click **View/Update Schedulers** button under “ACCOUNT, OPPORTUNITY, INVOICE AND PAYMENT SCHEDULERS” section.

CUSTOM FIELDS MAPPING
Click here to map custom fields in QuickBooks to Salesforce fields. [Map Fields](#)

INVOICE/ESTIMATE LINE ITEM TOTAL PRICE FIELD SETTING
Select the field that you want to sync to Total Price field for Invoice/Estimate Line Item.
Select Invoice Line Item Total Price Field: [Save](#)
Select Quote Line Item Total Price Field:

OPPORTUNITY STAGES SYNCHRONIZATION
Set the opportunity stages in which data updates from Salesforce to QuickBooks. [Select Stages](#)

SYNC ALL TAX CODES (QUICKBOOKS TO SALESFORCE)
Fetch all tax codes from QuickBooks to Salesforce. [Sync Now](#)

EXISTING DATA SYNCING (SALESFORCE TO QUICKBOOKS)
Sync All existing Data from Salesforce to QuickBooks (i.e. account, opportunity, quote, invoice and product data related to syncing stage opportunities). [Start Sync](#)

EXISTING DATA SYNCING (QUICKBOOKS TO SALESFORCE)
Sync All existing Data from QuickBooks to Salesforce (i.e. invoice and payment data related to opportunity already syncing to QB). [Start Sync](#)

ACCOUNT, OPPORTUNITY, INVOICE AND PAYMENT SCHEDULERS
Set the interval that updates data from QuickBooks to Salesforce (i.e. account, opportunity, invoice and payment data). [View/Update Schedulers](#)

QUICKBOOKS ACCOUNT CURRENCY DETAILS
QuickBooks Home Currency - USD
QuickBooks Multi Currency Enabled - FALSE [Refresh Currency Details](#)

Select the Scheduler and add interval and click save. Scheduler duration should be more than 30 minutes.

QB to sf schedulers

ACCOUNT SCHEDULERS
Set the interval that updates data from QuickBooks to Salesforce (i.e. QB Customer to SF Account). [Save](#)

OPPORTUNITY SCHEDULERS
Set the interval that updates data from QuickBooks to Salesforce (i.e. QB SubCustomer to SF Opportunity). [Save](#)

INVOICE SCHEDULERS
Set the interval that updates data from QuickBooks to Salesforce (i.e. invoice data related to opportunity already syncing to QB). [Save](#)

PAYMENT SCHEDULERS
Set the interval that updates data from QuickBooks to Salesforce (i.e. payment data related to opportunity already syncing to QB). [Save](#)

[Close](#)

Quickbooks API reconnect Schedulers

These schedulers are responsible for re-connecting integration process after 150 days of connection without disturbing any sync process.

