

QuickBook Connector

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Introduction

Easily integrate QuickBooks Online and WooCommerce with Wordpress Plugin! Connector Syncs customers, inventory, products and orders to QuickBooks automatically.

WooCommerce Quickbooks Online Connector Wordpress Plugin Hosted right in your WordPress Dashboard. The plugin allows you to sync real-time order info from WooCommerce To Quickbooks based on various triggers.

Now easily manage Accounting of your E-commerce Business into Quickbooks Online. No Monthly Subscription, buy it once and save more than \$500 per year.

Features

- **Sync Unlimited orders, without Monthly Fees.**
- True **Real-Time** Sync, connect QuickBooks Online and WooCommerce to automate your work
- User-Friendly and **Easy to Setup, No expertise in programming required.**
- Automatically Sync **New Orders** to Quickbooks Online as per selected rules.
- **Two Way Product inventory Sync.** Supports Products Export and Import from WooCommerce.
- **All order related data gets Auto Created in** Quickbooks Online. eg. Customer, taxes, shipping etc.
- Manually Push & Pull Data options available.
- **Support for Coupons/Discount, Taxes and Shipping charges.**
- **Update your products, customers & orders** from WordPress admin and it gets updated at QBO.
- **Export all Historical Orders or Specific Orders** to QuickBooks in Single Click
- Supports **syncing selected** Products, Customers and Orders.
- Since our plugin is fully in your WordPress install, you can rest assured knowing your **Data isn't passing through a 3rd party.**
- **It works for all countries** including **USA, CANADA, AUSTRALIA, UK** and **INDIA**

Following triggers/options available to choose your workflow

When an **order is placed** or **order status is completed** or **order status is processing** in WordPress then you can do following :

- **Create Estimate**
- **Create Invoice**

- **Create Sales Receipt**
- **Create Invoice and Send**
- **Create Sales Receipt and Send**
- **Create Estimate and Send**

When your order status is refunded you can :

- **Create Refund Receipt**
- **Create Credit memo**

Benefits of WooCommerce Quickbooks Integration

- Save your Time and Money
- Completely automated accounting
- Customer Information in QuickBooks is Always Accurate
- Effortlessly Manage Your Stock Levels
- Automatically Keep Your Products Updated
- Reduced Errors
- Instantly sync prices between Woo and QuickBooks.

Installation:

1) WordPress Plugin Uploader

1. Log into your WordPress admin panel
2. Navigate to Plugin -> Add New
3. Click Upload.
4. Click Choose File and select the Quickbooks plugin package zip.
5. Click Install Now.
6. Complete the installation process as directed by WordPress and Activate the plugin.

OR

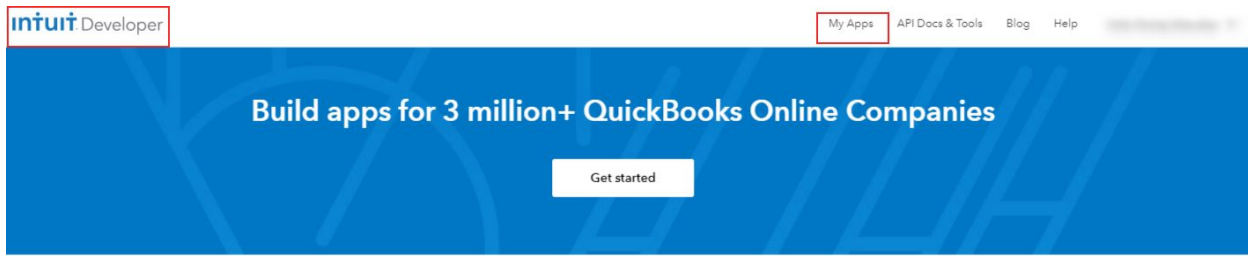
2) FTP

1. Decompress the .zip file you downloaded from CodeCanyon.
2. Find the WOO-QB-Connectorfolder (this directory is created when you unzip the file).
3. Upload the WOO-QB-Connectorfolder to your wp-content/plugins directory.
4. Navigate to your Control Panel: Plugins
5. Under **Quickbooks**, click *Activate* Panel: Plugin

Configuration Settings :

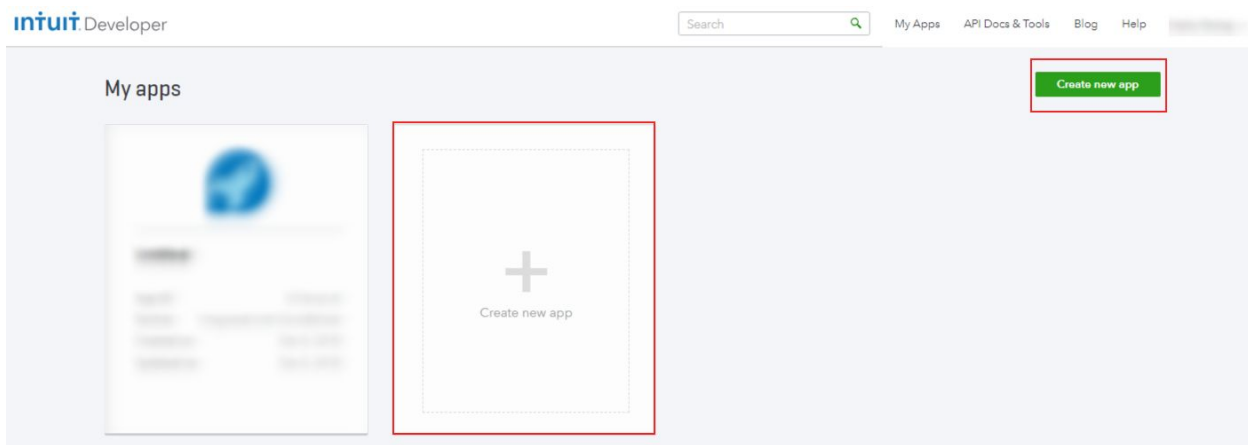
Integration :

1. Visit <https://developer.intuit.com>
2. Create your own account.
3. Login into Your Account
4. Go to My Apps



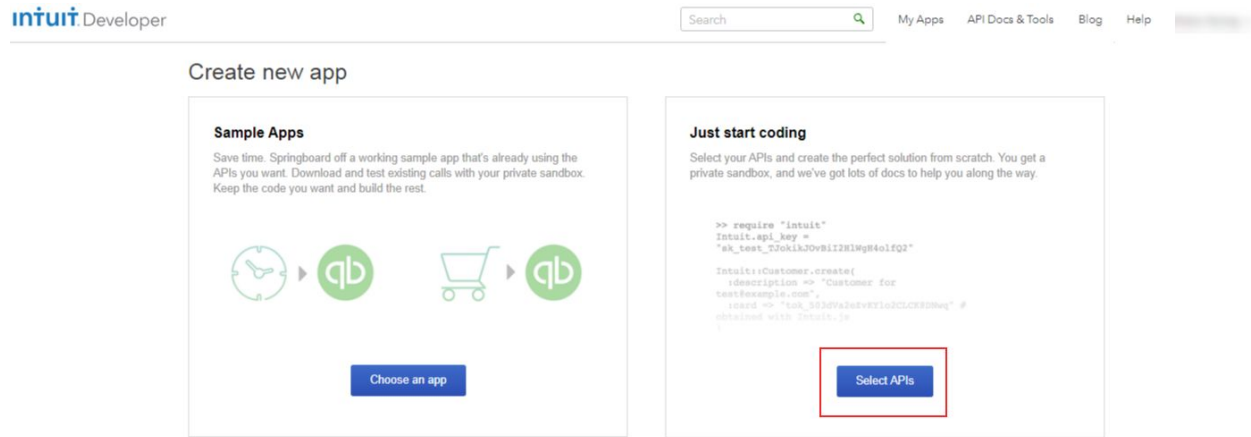
Screenshot - Intuit Account Dashboard

5. Click on Create new app



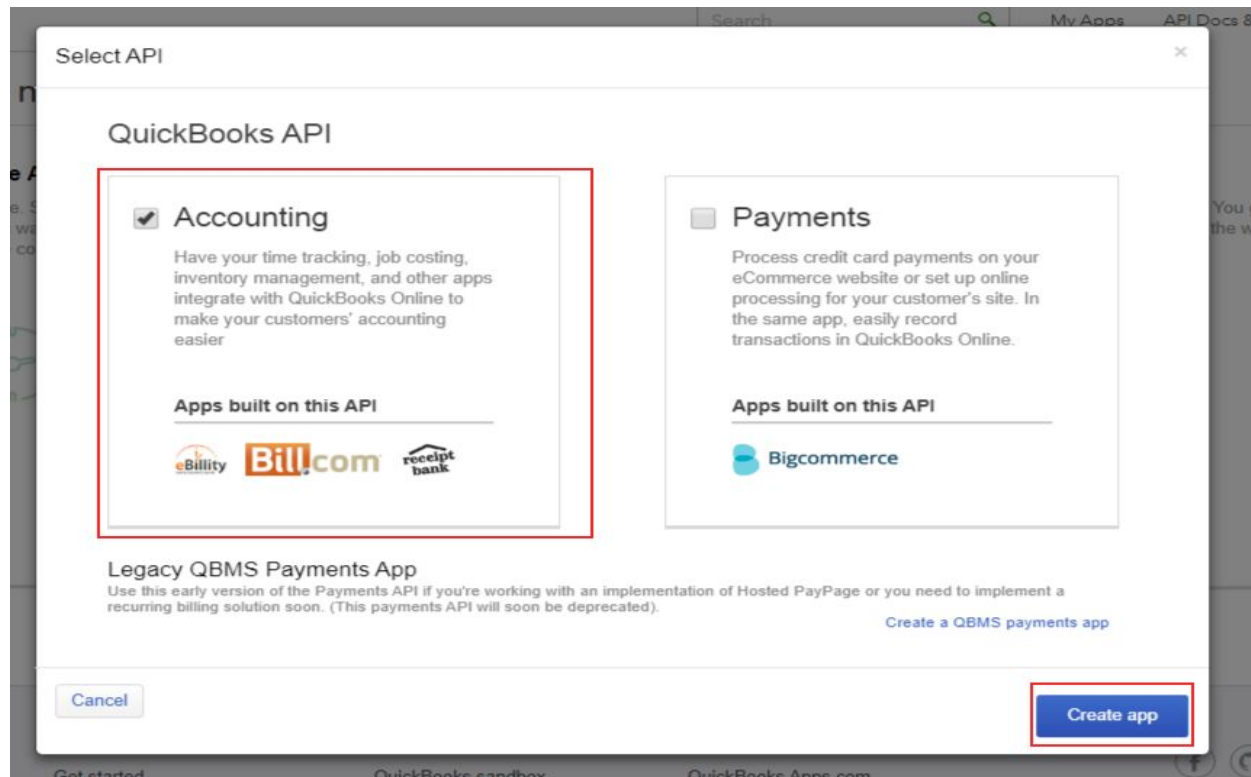
Screenshot - Intuit Create New App

6. After selecting a new window will be open please Select Just Start Coding - Select APIs.



Screenshot - Just Start Coding (Select APIs)

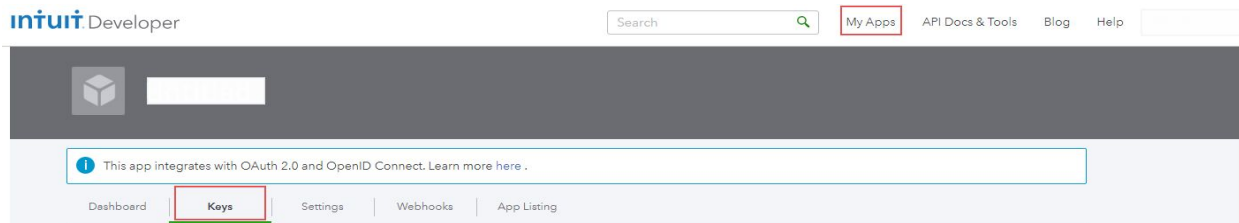
7. Select API,
Based on requirement you can Select Accounting and Payment API but for our Plugin Accounting API is mandatory



Screenshot - Select API

8. newly created App Dashboard

1. Please Select Keys



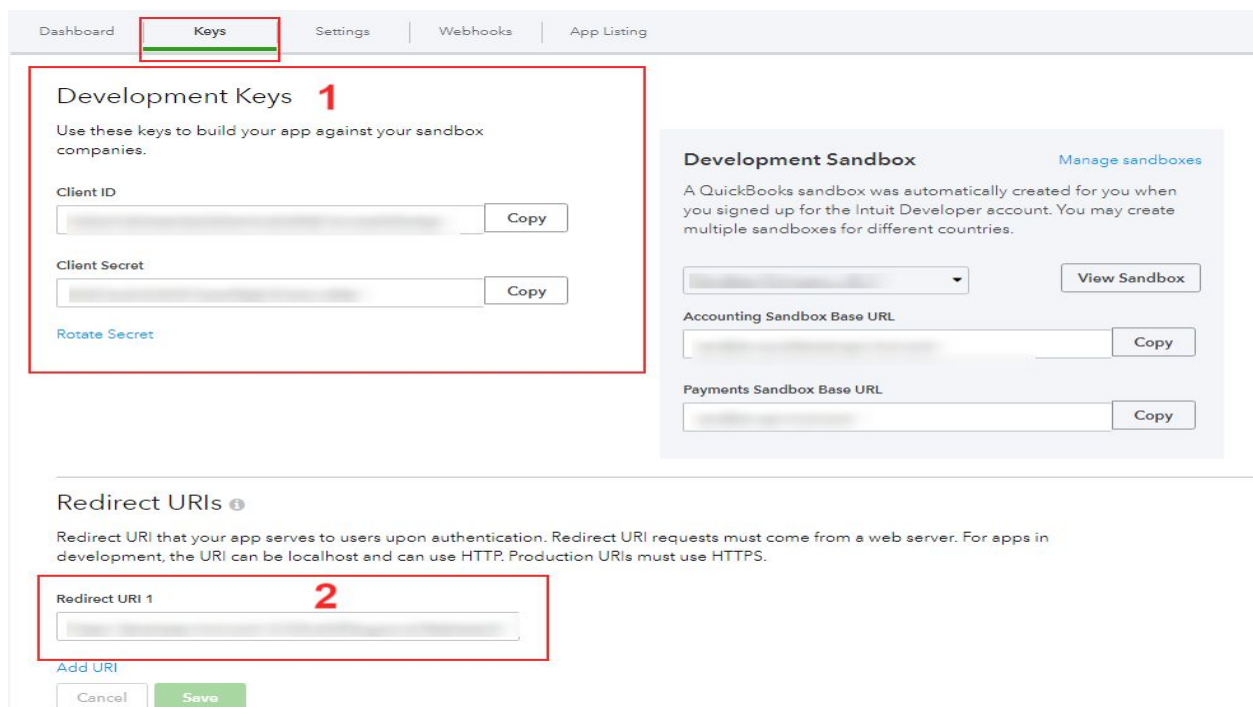
Screenshot 1

There you can see two types of key.

1.1. Development keys (Refer Screenshot 2)

1. Client ID and Client Secret Keys for Development Account.
(You need Client ID and Client Secret key in the WC to QB Connector Plugin (Refer Add Key Setting))

2. Add Redirect URL from your website here for Development Account.
(You get Redirect URL from our installed Plugin (Refer Add Key Setting))



Screenshot 2

- 1.2. Production keys. (Refer Screenshot 3)
 - 1. Client ID and Client Secret Keys for Production Account.
(You need Client ID and Client Secret key in the WC to QB Connector Plugin (Refer Add Key Setting))
 - 2. Add Redirect URL from your website here for Production Account.
(You get Redirect URL from our installed Plugin (Refer Add Key Setting))

Production Keys

Once you are ready, use these keys to go live with production companies.

Client ID **1**
 Show

Client Secret
 Show

[Rotate Secret](#)

Production QuickBooks companies [Manage companies](#)

View company

Accounting Production Base URL Copy

Payments Production Base URL Copy

Redirect URIs ¹

Redirect URI that your app serves to users upon authentication. Redirect URI requests must come from a web server. For apps in development, the URI can be localhost and can use HTTP. Production URIs must use HTTPS.

Redirect URI 1 **2**

[Add URI](#)

Screenshot 3

Woo Commerce to Quickbooks Connector

Note: Please go to WordPress Backend and Select WC to Quickbooks Connector plugin

Step 1: Add key

Please Enter Client ID and Client Secret Key of which account you want to add i.e Development or Production account. (Refer Screenshot 1)

Note :

1. If you did not create an account please Go to <https://developer.intuit.com> and create your own account. (Refer Configuration Setting)
2. To get a Client ID and Client Secret Key (Refer Configuration Setting Step No 8)
 - 2.1 Go to Intuit Account
 - 2.3 Go to MyApp
 - 2.2 Select App
 - 2.3 Go to Keys



Step 1 : Add Keys

Please add below url as Redirect URI in Quickbooks!

/quickbooks/wp-content/plugins/WOO-QB-Connector/success.php

Client ID :

Client Secret :

Select Account Type :

Screenshot 5

Step 2: Connect to Quickbooks

Please click on a button to Authenticate the Account.

Step 2 : Connect to Quickbooks



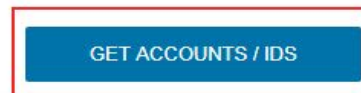
Screenshot 6

Step 3 Accounts Information:

- After selecting successful authentication, you have to click on '**Get Accounts / IDS**' Button to Get Ids of Accounts. (Refer Screenshot 7)
1. To Edit Quickbook id click on Get Quickbook Id column symbol (in Red Block Below Screenshot)

Step 3 : Accounts Information

Note : Please click on below Get Id buttons to get Ids.
Note : ID and Name should not be Empty.



Quickbook ID	Quickbook Account Name	Get Quickbook Id
401	Website Discounts given	
402	Website Services	
106	Shipping Charges	
104	Online Payment Fees	
105	Website Products	
1036	Guest Customer	

Note : Please click on below Get Accounts buttons to get Accounts & Choose relevant QB Accounts.

Income Account Reference	Website Account Sales of Product Income ▼	
Expencc Account Reference	Website Account Cost of Goods Sold ▼	
Asset Account Reference	Website Account Inventory Asset ▼	

Screenshot 7

Step 4: Connection Information

- Getting all Ids you can check or verify your connection using '**Verify Connection**' Button. (Refer Screenshot 8)
1. Check your connection is correctly configured by using "verify connection" button.
 2. Click on Refresh Connection
 3. Reset Connection

Step 4 : Connection Information



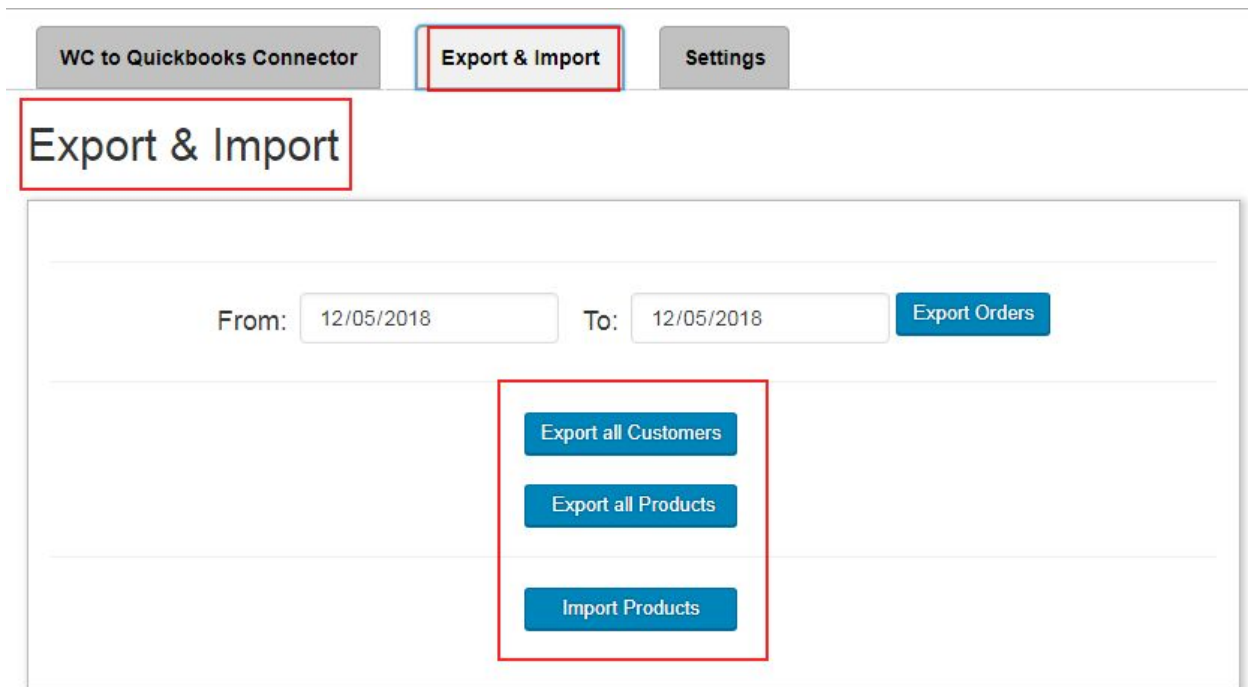
Screenshot 8

- If you want to reset all your connection then click on '**Reset Connection**' Button. (Refer Screenshot 8)
- Once you are successfully connected with Quickbooks You can sync all your Woocommerce information (customers, products, taxes, order, etc) with Quickbooks.
- After Successful Connectivity, you have to set up taxes in Quickbooks(Go to Sandbox -> Taxes)
- Also You have to enable discount and shipping on Quickbooks Side(Go to Company Settings on right top corner -> Sales -> Sales From Content -> Shipping / Discount).

Export & Import

Note: Please go to WordPress Backend and Select WC to Quickbooks Connector plugin

1. Select date to export all orders in QuickBooks
2. Click on **Export All Customers** to exports customers in QuickBooks.
3. Click on **Export All Products** to exports Products in QuickBooks.
4. Click on **Import All Products** to import Products from QuickBooks.



Screenshot 16

Settings: Rules for Export

1. Go to WP to Quickbooks Connector -> Settings.
2. This setting is used to sync your sales order according to the status and you have to select the form in which you want to sync your sales order in the future.
3. Default values are set to 'Processing' and 'Invoice'. (Refer Screenshot 12)

WC to Quickbooks Connector Export & Import **Settings**

Settings

Rules for Export ▾

- When Sales Order Status is : Pending payment
Processing
On hold
Completed
- I want to create/update Invoice in QBO.
- I want to create/update Refund in the Form of Refund Receipt in QBO.
- If Sales Order is Placed with status Processing/Completed, automatically Sync Payment to QBO.
- If Sales Order is Placed with status Refunded, automatically Sync Refund to QBO.
- Create Customer in QBO when Sales Order is Placed by Guest Customer.

Advance Settings ▾

SAVE

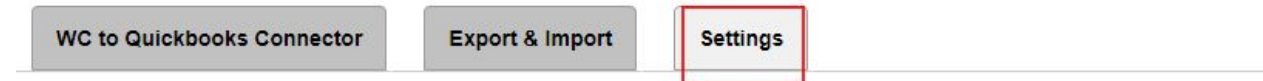
Screenshot 9

Settings: Advanced Setting

Here you can access advanced Settings.

Such as

1. Setup cron for import Products
2. Enable Debug Log
3. Create Variable product
4. Enable Multi-Currency



Settings

Rules for Export ▾

Advance Settings ▾

- Enable only if you have switched Item / Sub-item to Categories in your Quickbooks Online.
- Create variable product from Category Hierarchy while Import Product from QBO.
- Enable only if you have Enable Multi-Currency in your Quickbooks Online.
- Enable Debug Log
- Sync Short Description instead Long Description.
- Set Cron for Import Products

SAVE

Screenshot 10

Guidelines For Settings

1. When an order is placed or order status is completed or order status is processing in

WordPress then you can do following :

- **Create Estimate**
- **Create Invoice**
- **Create Sales Receipt**
- **Create Invoice and Send**
- **Create Sales Receipt and Send**
- **Create Estimate and Send**

2. When your order status is refunded you can :

- **Create Refund Receipt**
- **Create Credit memo**

3. Additionally you can export single or multiple orders from Woocommerce "Orders".

4. Export and import single or multiple Products from Woocommerce "Products".

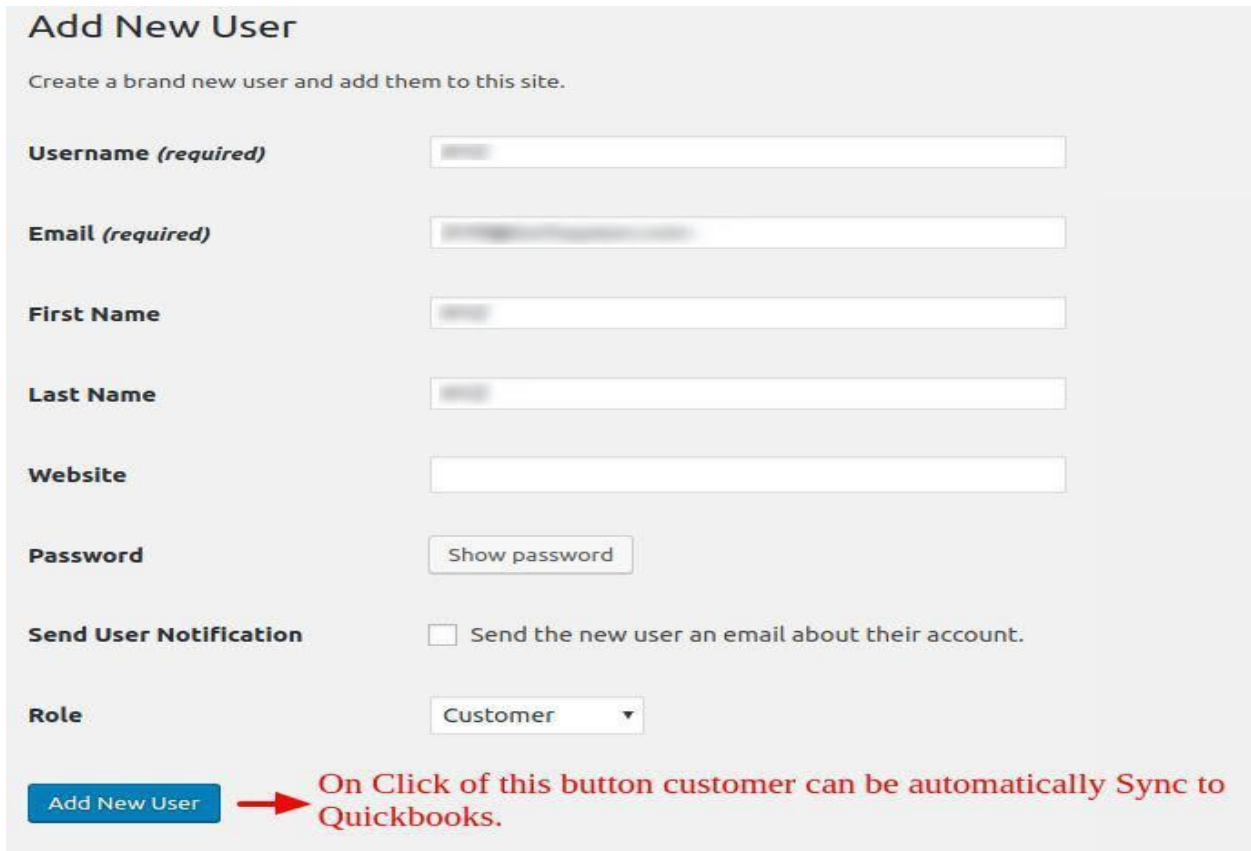
FAQ : Can I Sync Shipping Charges, Coupons to Quickbooks?

-> Yes! You can, You just have to enable those on Quickbooks side.

Quick Start:

1.Customer Sync :

1. Go To Users -> Add New.
2. You can Sync single Customer automatically (i.e real time Sync) when it is created (Refer Screenshot 11).



Add New User

Create a brand new user and add them to this site.

Username (required)

Email (required)

First Name

Last Name

Website

Password

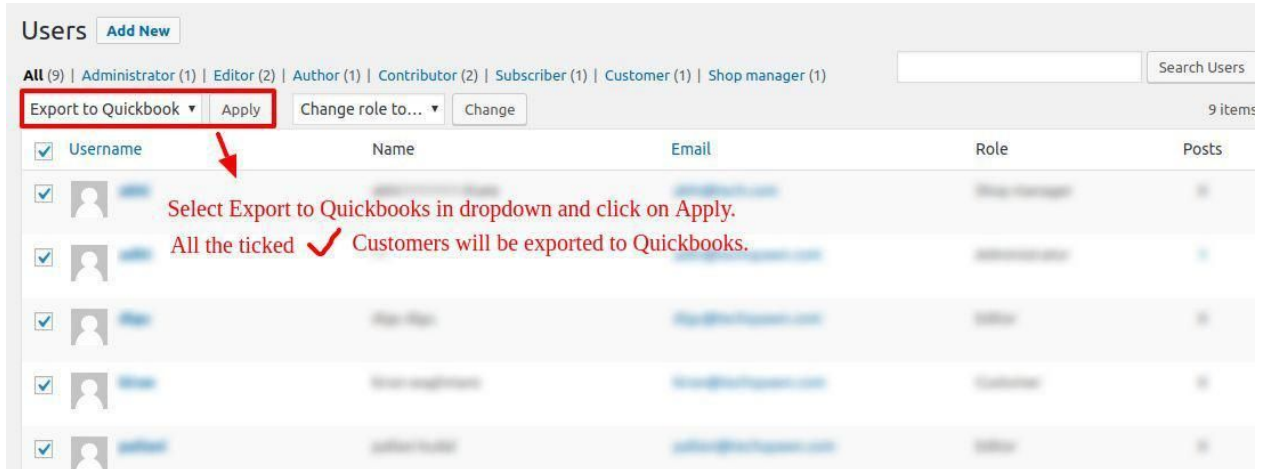
Send User Notification Send the new user an email about their account.

Role

→ On Click of this button customer can be automatically Sync to Quickbooks.

Screenshot 11

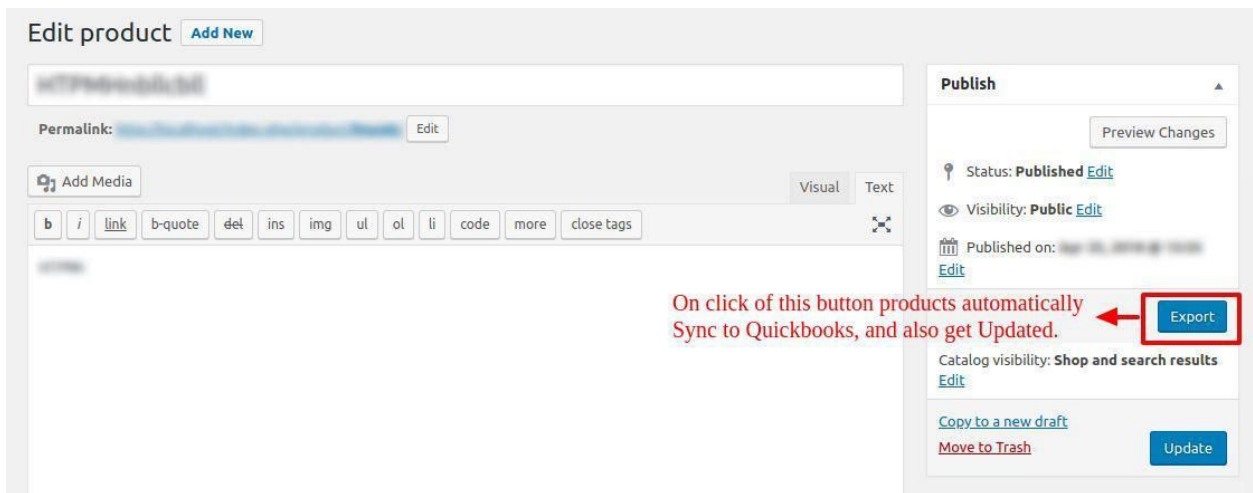
1. Go To Users page.
2. Multiple Customer can be Sync from Bulk action menu (i.e manually Sync) (Refer Screenshot 8).



Screenshot 12

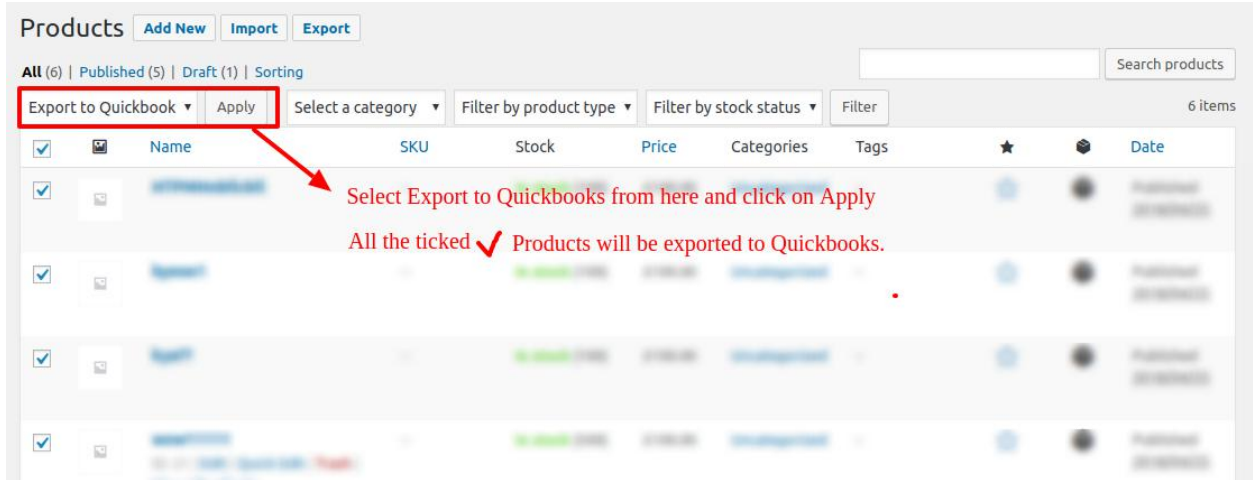
2. Product Sync :

1. Go To Product -> Add New
2. You can Sync Single Product automatically (i.e real time Sync) after it is published (Refer Screenshot 9).



Screenshot 13

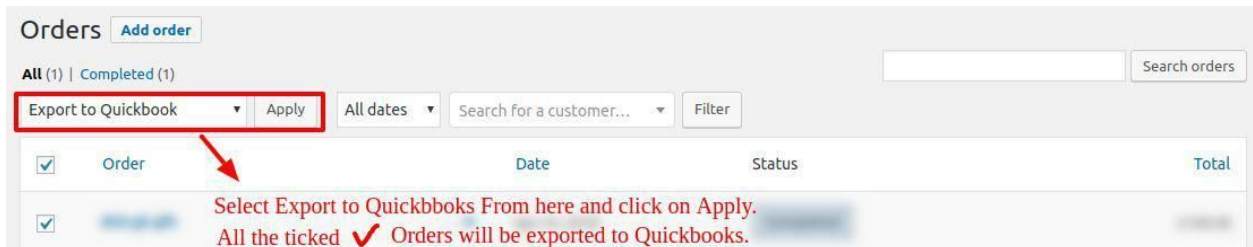
1. Go To Product page
2. Multiple Product can be Sync from Bulk action menu (i.e manually Sync) (Refer Screenshot 10).



Screenshot 14

3. Order Sync :

1. You can Sync single Order automatically (i.e real-time Sync) when it is created by User.
2. Go To WooCommerce -> Orders page.
3. Multiple Order can be Sync from Bulk action menu (i.e manually Sync) (Refer Screenshot 11).



Screenshot 15

FAQ

1.How to get quickbook ID for account details?

- You need to click on all **Get ID** and **Get Account** buttons. It will fetch IDs from quickbooks. Then you will have hit verify connection button to check if its connected

2.Upon setup of the plugin, when we get to the part where we are supposed to click on the green quickbooks connect to quickbooks button within the plugin, it just opens a window and says "sorry we are having some problems with that link"?

- You need to copy Redirect URI to Quickbooks App which you have created.

3.How I can enable MultiCurrency option?.

- First you need to enable multicurrency option in Quickbook then you can enable multicurrency option our plugin, we only support **WooCommerce MultiCurrency plugin**

4.Where I can get Production or Development Key?

- You need to create app in <https://developer.intuit.com> By using instructions. App will have key you are looking for.

5.If I'm having issues with getting anything to sync to my Quickbooks. None of my orders are syncing automatically or manually. I also can't get the products or customers to sync to my Quickbooks either.

- Things to check on Quickbooks side:
 - 1) go to Settings -> Company Settings -> Sales -> Sales Form Content -> Turn on shipping.
 - 2) go to Settings -> Company Settings -> Sales -> Sales Form Content -> Turn on Discount
 - 3) check whether taxes are settled up or not.

6. My Intuit Developer account is created and I have the production keys. I have put in the information in plugin, but when I click on connect after I choose which account to sync, I get a 404 page.

- Deactivate security plugins.
Due to security plugin Success.php file from plugin folder is not accessible or blocked.