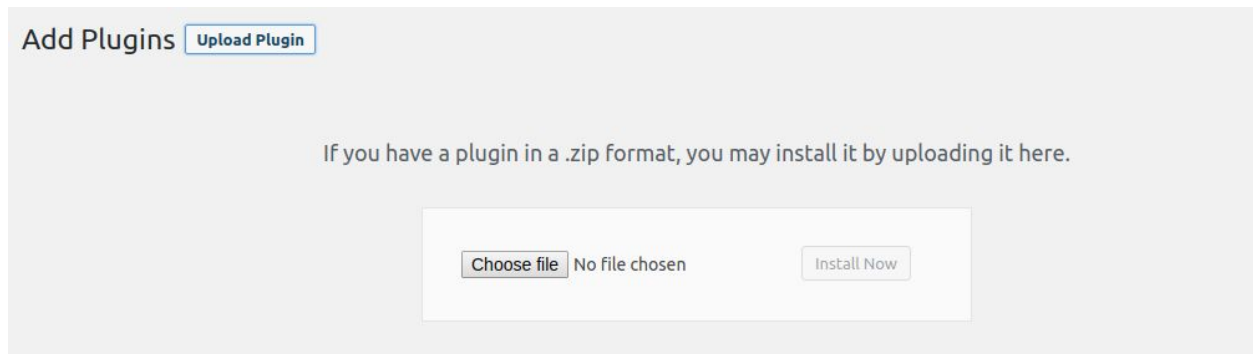


## Quickbooks Document :

### Installation :

#### 1) WordPress Plugin Uploader

1. Log into your WordPress admin panel
2. Navigate to Plugin -> Add New
3. Click Upload.



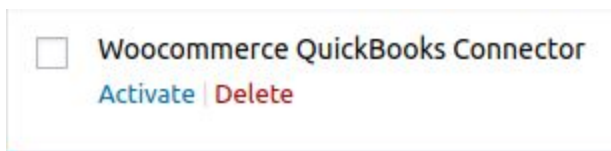
4. Click Choose File and select the Quickbooks plugin package zip.
5. Click Install Now.
6. Complete the installation process as directed by WordPress and Activate the plugin.

OR

#### 2) FTP

1. Decompress the .zip file you downloaded from CodeCanyon.
2. Find the WOO-QB-Connector folder (this directory is created when you unzip the file).

3. Upload the **WOO-QB-Connector** folder to your **wp-content/plugins** directory.
4. Navigate to your Control Panel: Plugins
5. Under **Quickbooks**, click *Activate* | Panel: Plu



# Configuration Settings :

## 1) Integration :

The screenshot displays the Intuit Developer configuration page for a development account. The page is divided into several sections:

- Navigation:** At the top, there are links for "My Apps", "API Docs & Tools", "Community", and "Help". A red box highlights "My Apps" with the annotation "Inside My Apps select your App."
- Keys Tab:** The "Keys" tab is selected and highlighted with a red box, with the annotation "Inside Keys Tab".
- Development Keys:** This section contains fields for "Client ID" and "Client Secret", both with "Copy" buttons. A red box highlights these fields with the annotation "Client Id and Client Secrete Keys for Development Account." Below them is a "Rotate Secret" link.
- Development Sandbox:** This section includes a "Development Sandbox" header and a "Base Url for Development Account." dropdown menu. Below it are fields for "Accounting Sandbox Base URL" and "Payments Sandbox Base URL", both with "Copy" buttons. A red box highlights the "Accounting Sandbox Base URL" field with the annotation "Base Url for Development Account."
- Redirect URIs:** This section has a heading "Redirect URIs" and a description. It contains two input fields for "Redirect URI 1" and "Redirect URI 2", each with a trash icon. A red box highlights the "Redirect URI 1" field with the annotation "Add Redirect Uri From your Website here for Development Account." Below the fields are "Add URI", "Cancel", and "Save" buttons.
- Production Keys:** This section is similar to the development keys, with "Client ID" and "Client Secret" fields, "Show" buttons, and a "Rotate Secret" link. A red box highlights the "Client ID" and "Client Secret" fields with the annotation "Client Id and Client Secrete Keys for Production Account."
- Production QuickBooks companies:** This section includes a "Production QuickBooks companies" header and a "Base Url for Production Account." dropdown menu. Below it are fields for "Accounting Production Base URL" and "Payments Production Base URL", both with "Copy" buttons. A red box highlights the "Accounting Production Base URL" field with the annotation "Base Url for Production Account."
- Production Redirect URIs:** This section is similar to the development redirect URIs, with two input fields for "Redirect URI 1" and "Redirect URI 2". A red box highlights the "Redirect URI 1" field with the annotation "Add Redirect Uri From your Website here for Production Account."

The footer of the page contains navigation links for "Intuit Developer", "Explore", "Develop", and "Intuit", along with copyright information and a "TRUSTE" logo.

(Screenshot 1)

- Firstly, Go to <https://developer.intuit.com> create your own account.
- Create one App in Quickbooks (Refer Screenshot 1).
- Inside App, Go to Keys. There you can see two types of key. Refer Screenshot 1)
  - 1) Development keys.
  - 2) Production keys.
- Select Your Client ID, Client Secret and Base Url accordingly.(Refer Screenshot 1)
- Go to '**Wp to Quickbooks Connector**' page, and enter your **Client Id, Client secret key and base url** from your quickbooks account, and click on save changes. (Refer Screenshot 2)

## Woocommerce Quickbooks Connector :

### Step 1 : Add Keys

Please add below url as Redirect URI in Quickbooks!

[https://www.techspawN.com/wordpress/wp-content/plugins/woocomm-quickbooks-connector/](#)

Enter Client ID :

Enter Client Secret :

Enter Base URL :

### (Screenshot 2)

- Add given redirect URL in quickbooks below client key and client secret key. Then click on connect with Quickbooks. (Refer Screenshot 3)

## Woocommerce Quickbooks Connector :

### Step 1 : Add Keys

Please add below url as Redirect URI in Quickbooks!

[https://www.techspawn.com/woocommerce-quickbooks-connector/](#)

Enter Client ID :

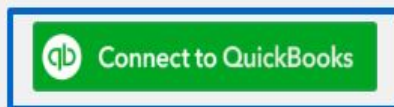
Enter Client Secret :

Enter Base URL :

SAVE CHANGES

### Step 2 : Connect to Quickbooks

**NOT CONNECTED!**



You must authenticate to QuickBooks **once** before you can exchange data with it.

**You only have to do this once!**

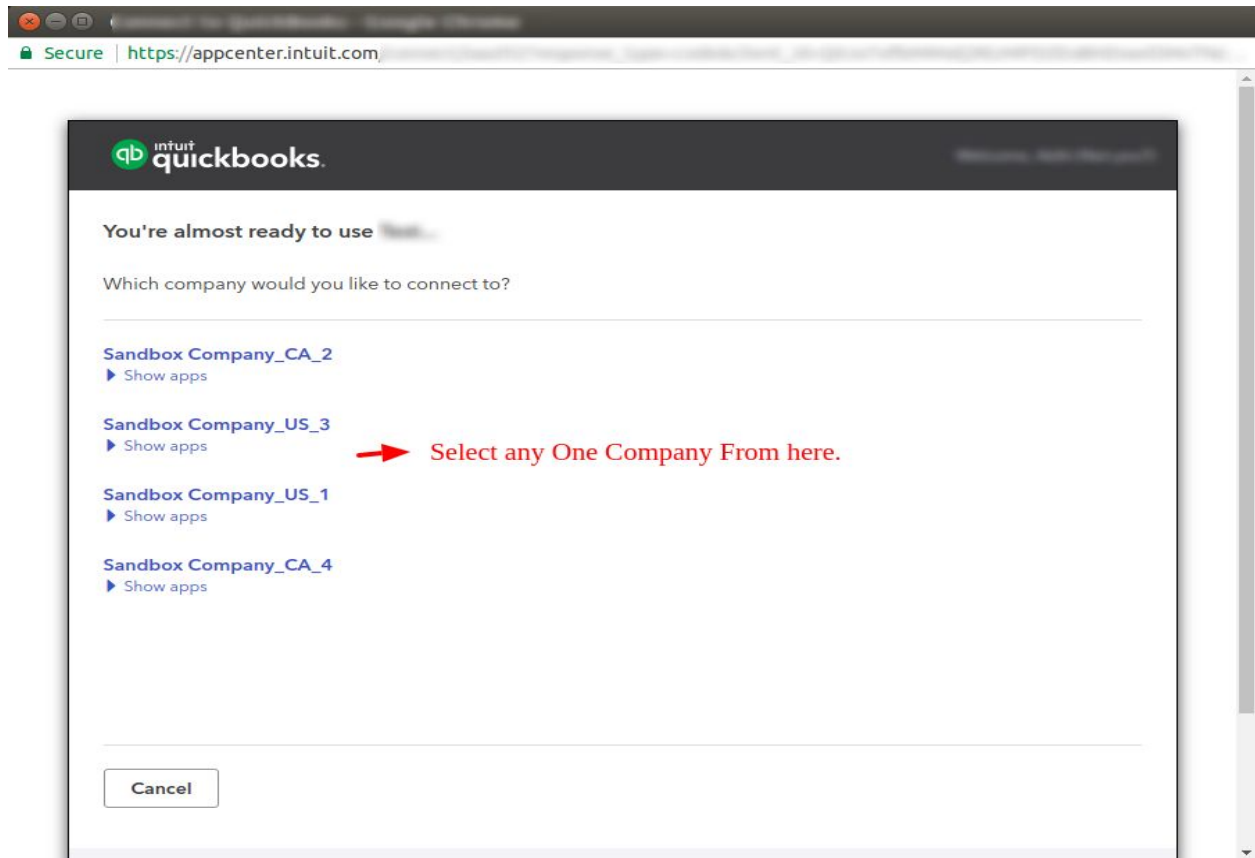
After you've authenticated once, you have to go through this connection process again after 100 days if you never exchange data with Quickbooks in this period.

Click the button above to authenticate and connect.

Change Credentials

### (Screenshot 3)

- After connection popup will appear there you have to select company in your qb account and authorize your connection. (Refer Screenshot 4)



(Screenshot 4)

- After selecting successful authentication, you have to click on '**Get Id**' Button to Get Ids of Accounts. (Refer Screenshot 5)
- After Getting all Ids you can check or verify your connection using '**Verify Connection**' Button. (Refer Screenshot 5)
- If you want to reset all you connection then click on '**Reset Connection**' Button. (Refer Screenshot 5)
- 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).

### Woo QB Connector

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

**Connected**

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### Step 1 : Add Keys

Please add below url as Redirect URI in Quickbooks!

<http://localhost/wp-content/plugins/Woo-QB-Connector/index.php>

Client ID :

Client Secret :

Base URL :

### Guidelines For Quickbooks

1. Add client Id, Client Secret ID and base Url.
  2. Add redirect URL to quickbooks.
  3. Then connect with Quickbooks and select your company.
  4. Get all IDs required.
  5. Enable Shipping, Discounts and taxes to qb side.
  6. Here you go, Now you can sync customers, products, orders etc...

### Step 2 : Connect to Quickbooks

Connect to QuickBooks

### Step 3 : Accounts Information

Note : ID and Name should not be Empty

Quickbook ID	Quickbook Account Name	Get Quickbook Id
1580	Website Account Sales of Product Income	
1580	Website Account Cost of Goods Sold	
1580	Website Account Inventory Asset	
1580	Website Accounts pay	
1580	Website Services	
1580	Shipping Charges	
1580	Online Payment Fees	
1580	Website Products	
1580	Quick Customer	

### Step 4 : Connection Information

VERIFY CONNECTION

REFRESH CONNECTION

RESET CONNECTION

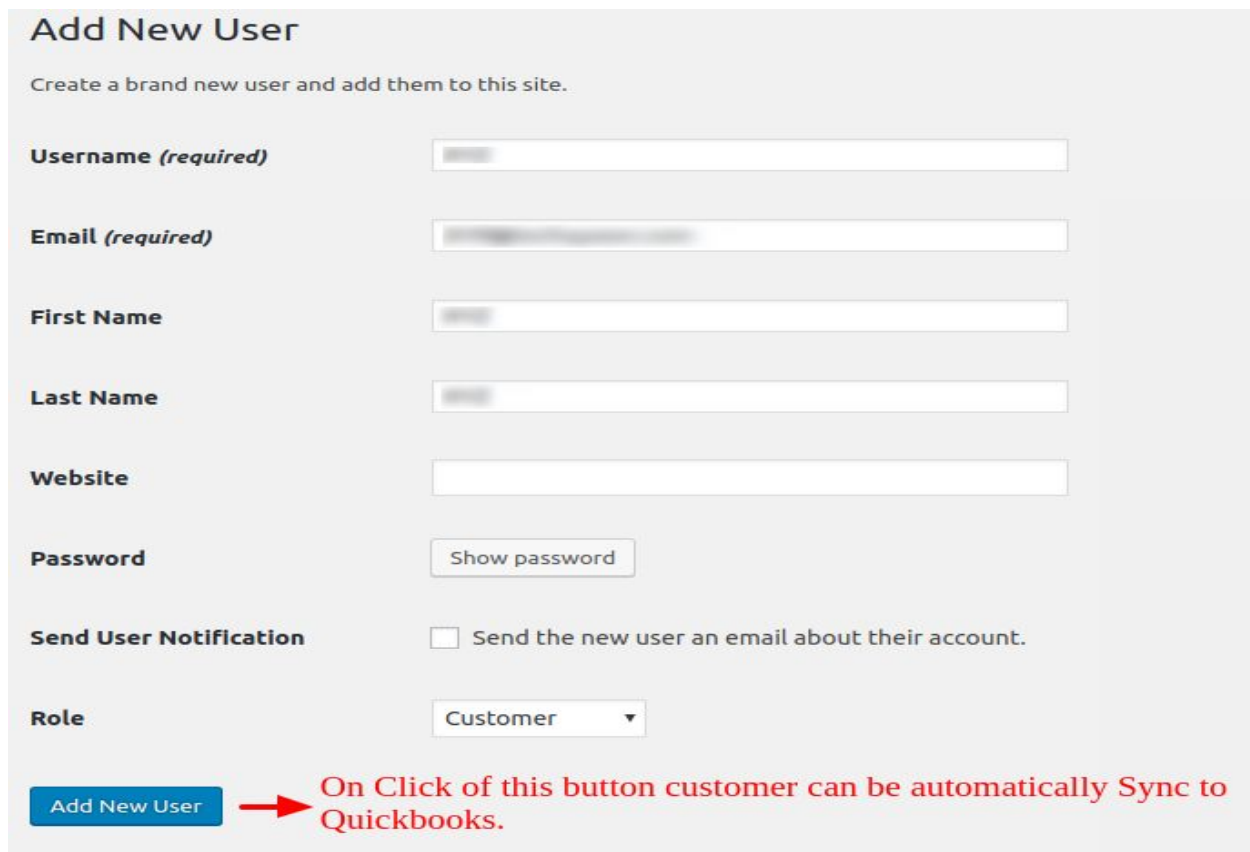
(Screenshot 5)

**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 :

- Go To Users -> Add New.
- You can Sync single Customer automatically (i.e real time Sync) when it is created (Refer Screenshot 7).



**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**

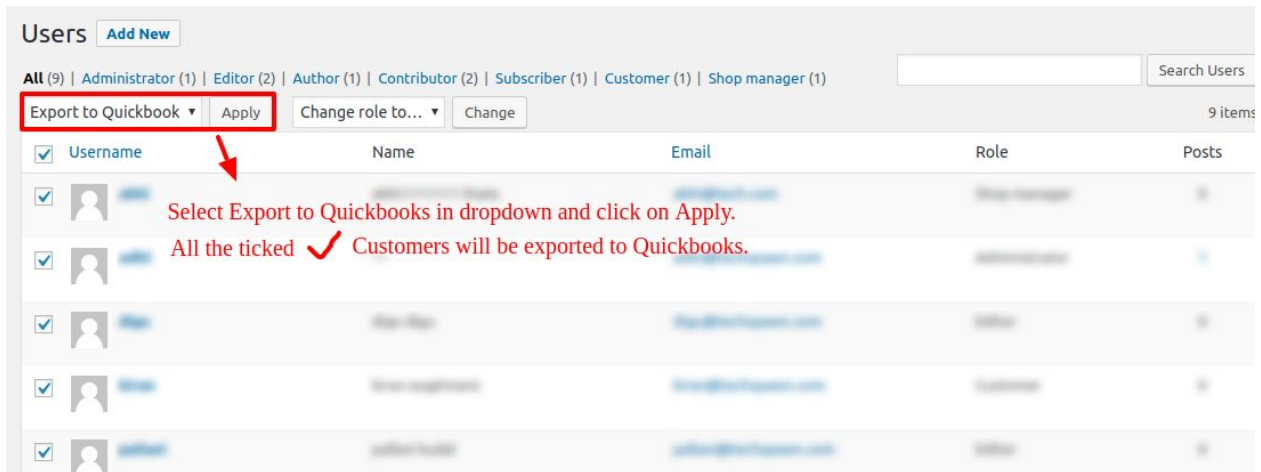
→ On Click of this button customer can be automatically Sync to Quickbooks.

(Screenshot 7)

- Go To Users page.



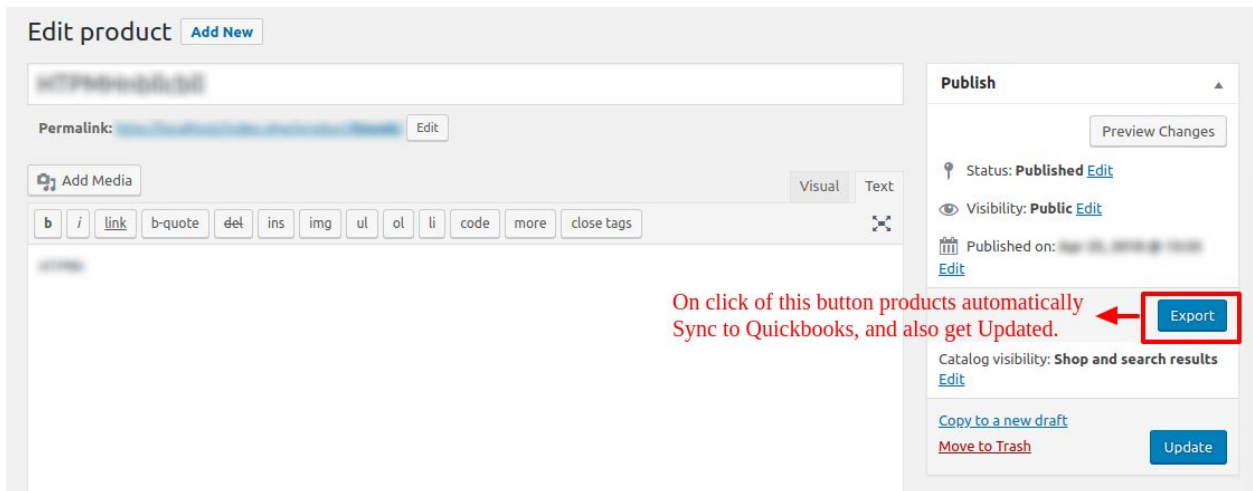
- Multiple Customer can be Sync from Bulk action menu (i.e manually Sync) (Refer Screenshot 8).



(Screenshot 8)

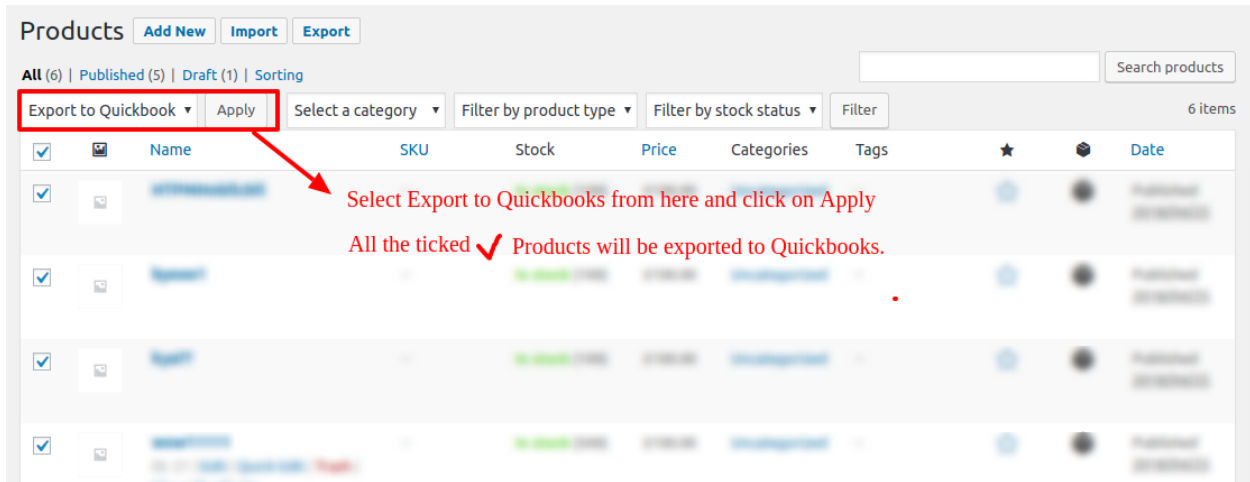
## 2. Product Sync :

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



(Screenshot 9)

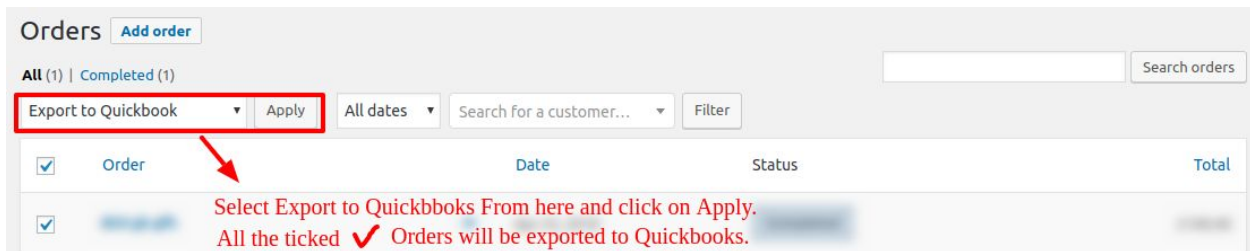
- Go To Product page
- Multiple Product can be Sync from Bulk action menu (i.e manually Sync) (Refer Screenshot 10).



(Screenshot 10)

### 3. Order Sync


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



(Screenshot 11)

### 4. Rules For Sales Order :


- Go to WP to Quickbooks Connector -> Settings.
- This settings 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.
- Default values are set to 'Processing' and 'Invoice'. (Refer Screenshot 12)



**Woo QB Connector**

Easily integrate QuickBooks Online and WooCommerce with Wordpress Plugin!

Connector Syncs customers, inventory, products and orders to QuickBooks automatically.


  
Connected

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## Settings

When Sales Order Status is : Pending  
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.

Enable Debug Log

SAVE


## Guidelines For Quickbooks

1. Add client Id, Client Secret ID and base Url.
2. Add redirect URL to quickbooks.
3. Then connect with Quickbooks and select your company.
4. Get all IDs required.
5. Enable Shipping, Discounts and taxes to qb side.
6. Here you go, Now you can sync customers, products, orders etc...

(Screenshot 12)

## 5. Export All Customer, Product and Order :

- Go to WP to Quickbooks Connector -> Export & Import.
- You can Export All Customers, Products and Orders On Single Click. (Refer Screenshot 13 & 14).



## Woo QB Connector

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

**Connected**

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[Get Support](#)

[WC to Quickbooks Connector](#) | [Export & Import](#) | [Settings](#)

### Export & Import

From:  To:  [Export Orders](#)

[Export all Customers](#)

[Export all Products](#)


[Import Products](#)

### Guidelines For Quickbooks

1. Add client id, Client Secret ID and base Url.
2. Add redirect URL to quickbooks.
3. Then connect with Quickbooks and select your company.
4. Get all IDs required.
5. Enable Shipping, Discounts and taxes to qb side.
6. Here you go, Now you can sync customers, products, orders etc...

(Screenshot 13)

Export All



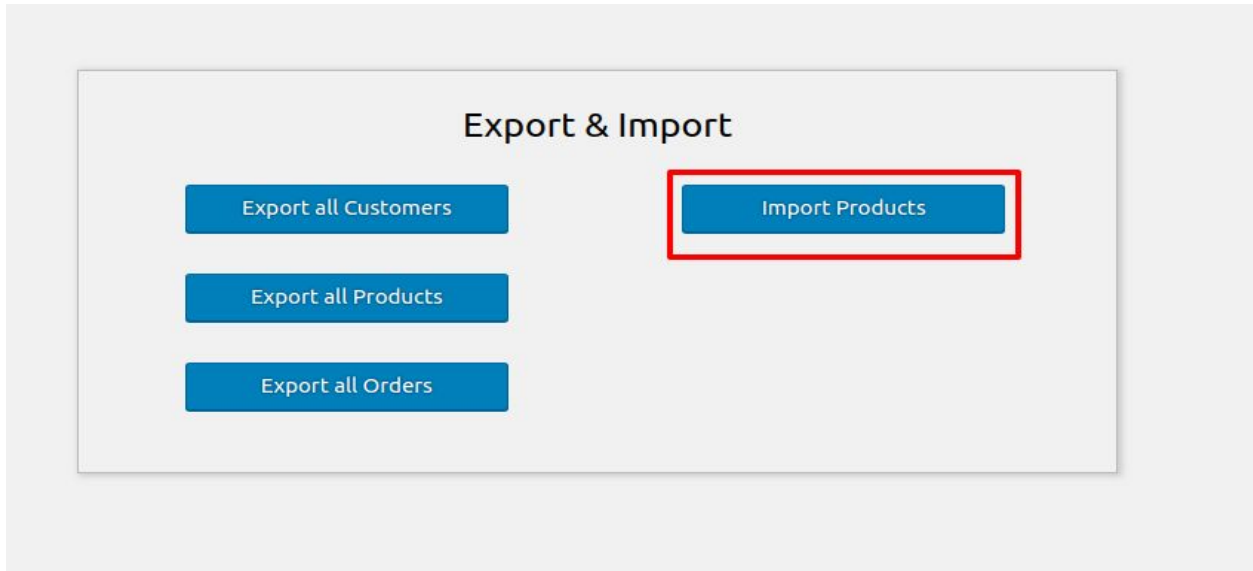
### Success

Customers are successfully Exported

[OK](#)

(Screenshot 14)

## 6. Import All Products :

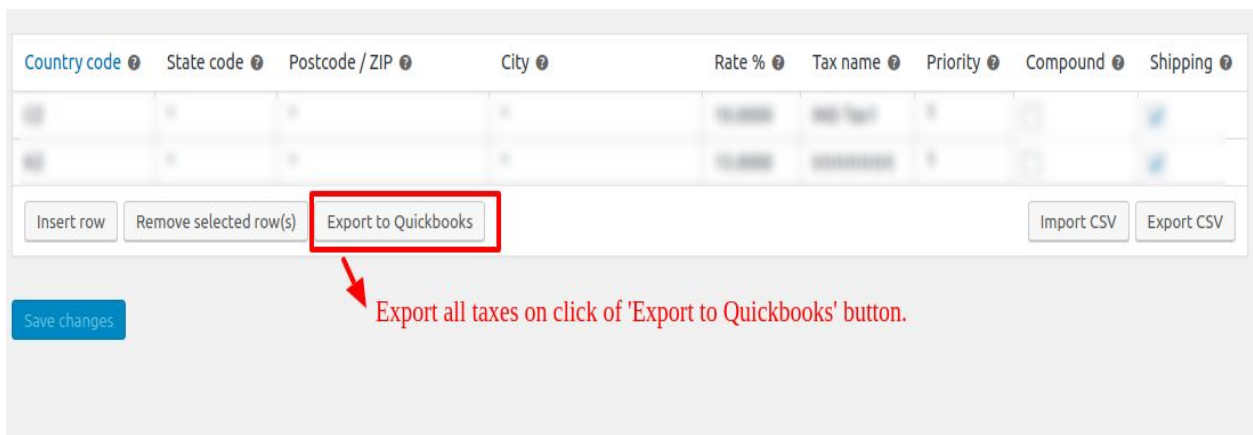


(Screenshot 15)

- Go to WP to Quickbooks Connector -> Export & Import.
- You can Import All Products from Quickbooks On Single Click. (Refer Screenshot 15).

## 7. Tax Sync :

- Export all the Taxes on single Click (Refer Screenshot 16).



(Screenshot 16)

## 8. Payment Receipt Sync :

- You can Sync Payment Receipt of Order.
- Plugin will automatically Create Payment Receipt.
- Rules For Payment Receipt :
  1. If you choose Estimate on Settings Page then payment will not generate for Estimate.
  2. If you choose Invoice then only for 'Processing' and 'Completed' Sales order, payment can be generated.
  3. If you choose Sales Receipt then Payment can be generate for all orders.

## 9. Refund Receipt Sync :

- You can Sync Refund Receipt of the Refunded Order.
- You just need to go on Order Page ,select an Order and change its status to refunded and update the order.
- Plugin will automatically Create Refund Receipt.
- Rules For Refund Receipt :
  1. If you choose Estimate on Settings Page then refund will not generate for Estimate.
  2. If you choose Invoice then only for 'Processing' and 'Completed' Sales order, Refund can be generated.
  3. If you choose Sales Receipt then Refund can be generate for all orders.