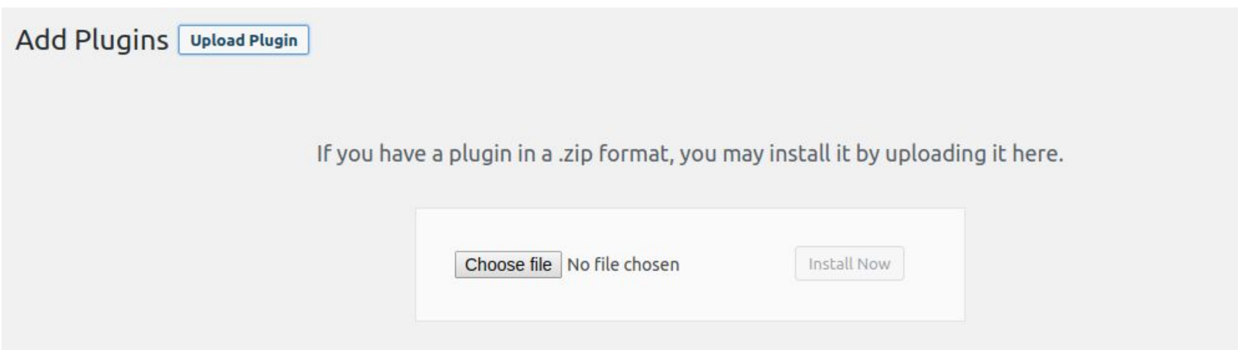
Quickbooks Document :

Installation :

1) WordPress Plugin Uploader

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



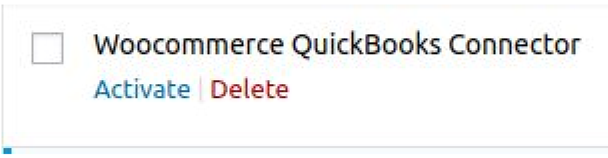
4. Click Choose File and select the Quickbooks plugin package zip.
5. Click Install Now.
6. Complete the installation process as directed by WordPress and Activate the plugin.

OR

2) FTP

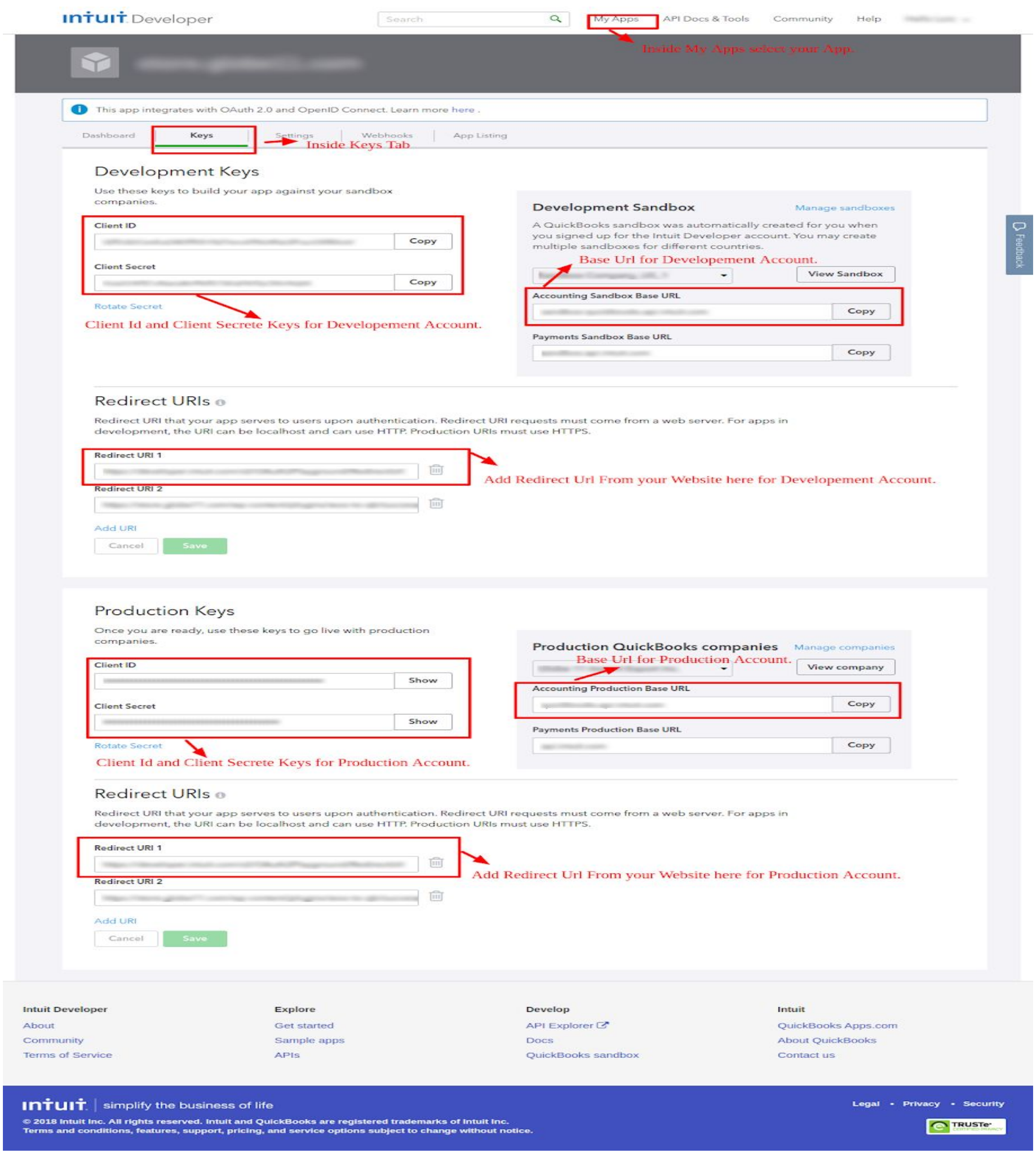
1. Decompress the .zip file you downloaded from CodeCanyon.
2. Find the WOO-QB-Connector folder (this directory is created when you unzip the file).

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* l Panel: Plu



Configuration Settings :

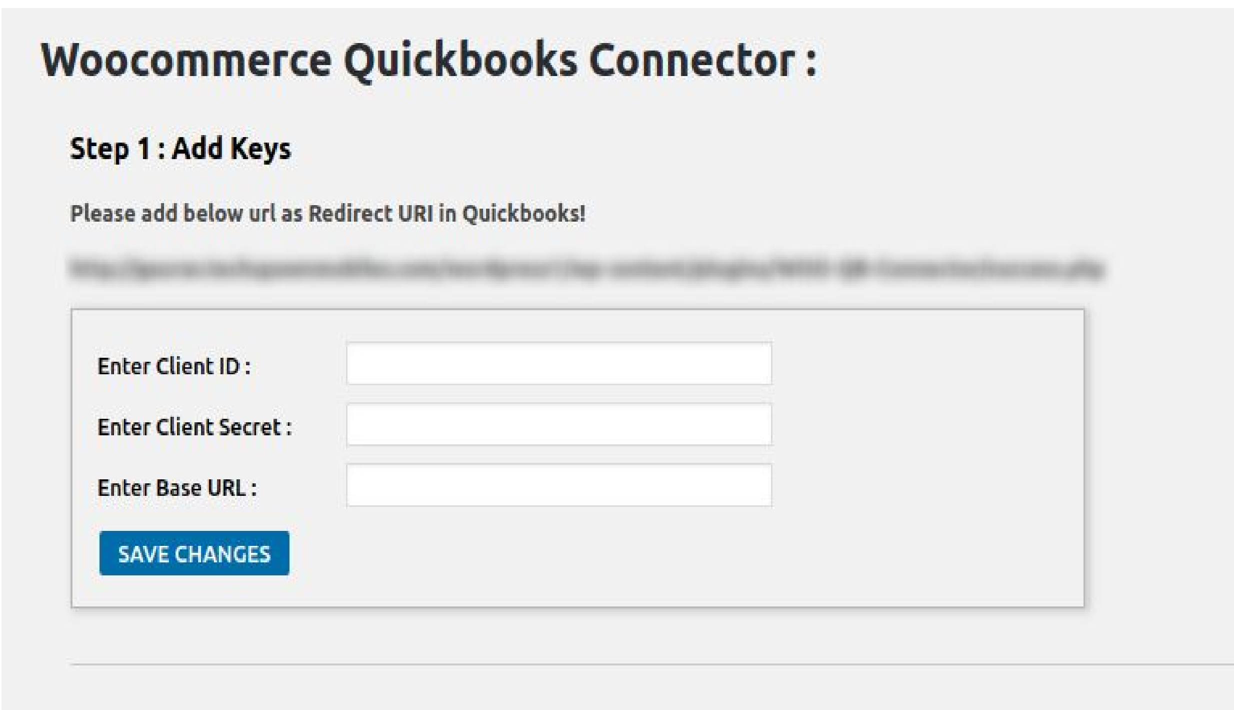
1) Integration :



(Screenshot 1)

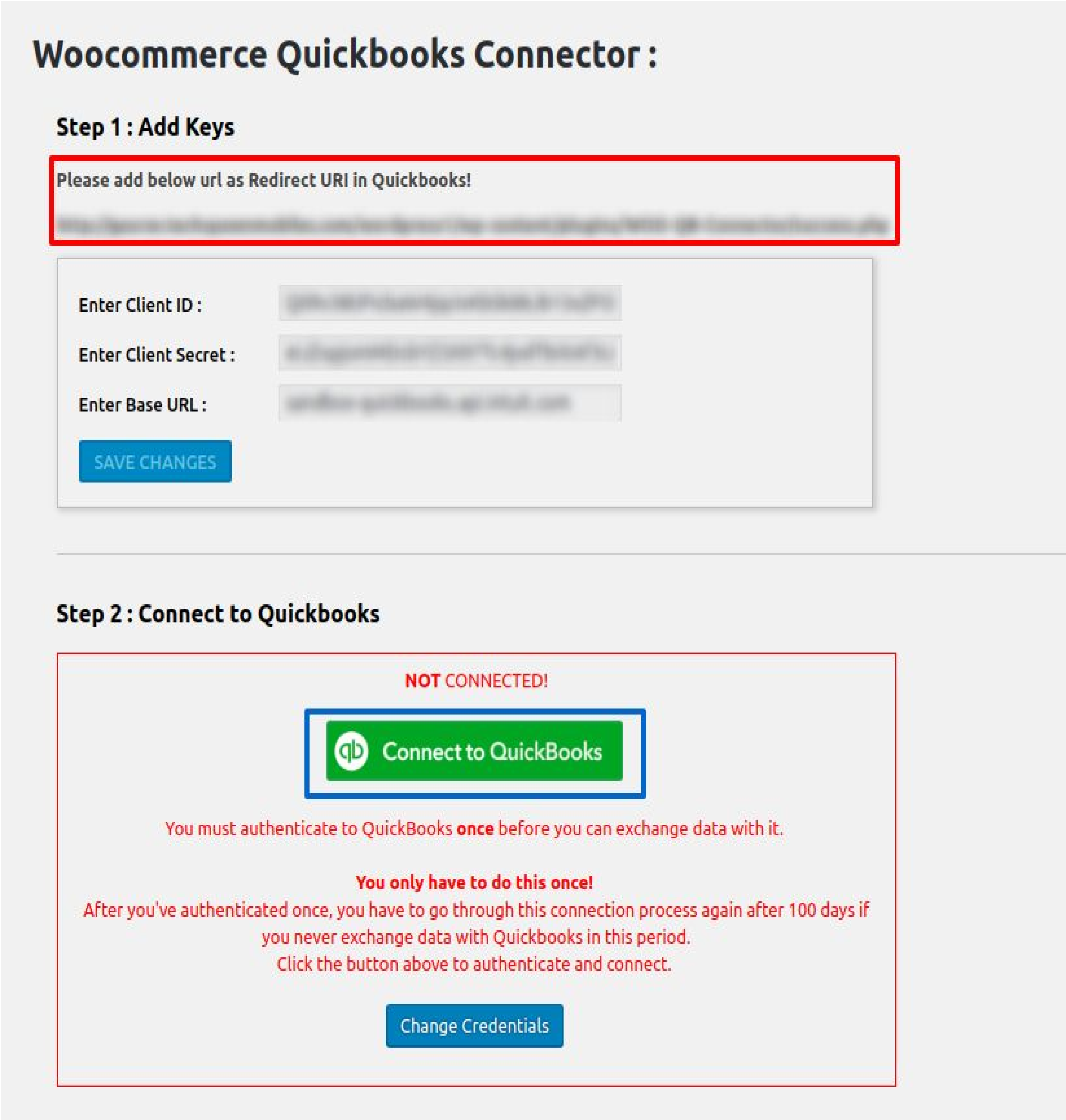
- Firstly, Go to https://developer.intuit.com create your own account.
- Create one App in Quickbooks (Refer Screenshot 1).
- Inside App, Go to Keys. There you can see two types of key. Refer Screenshot 1)
  1) Developement keys.
  2) Production keys.
- Select Your Client ID, Client Secret and Base Url 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)



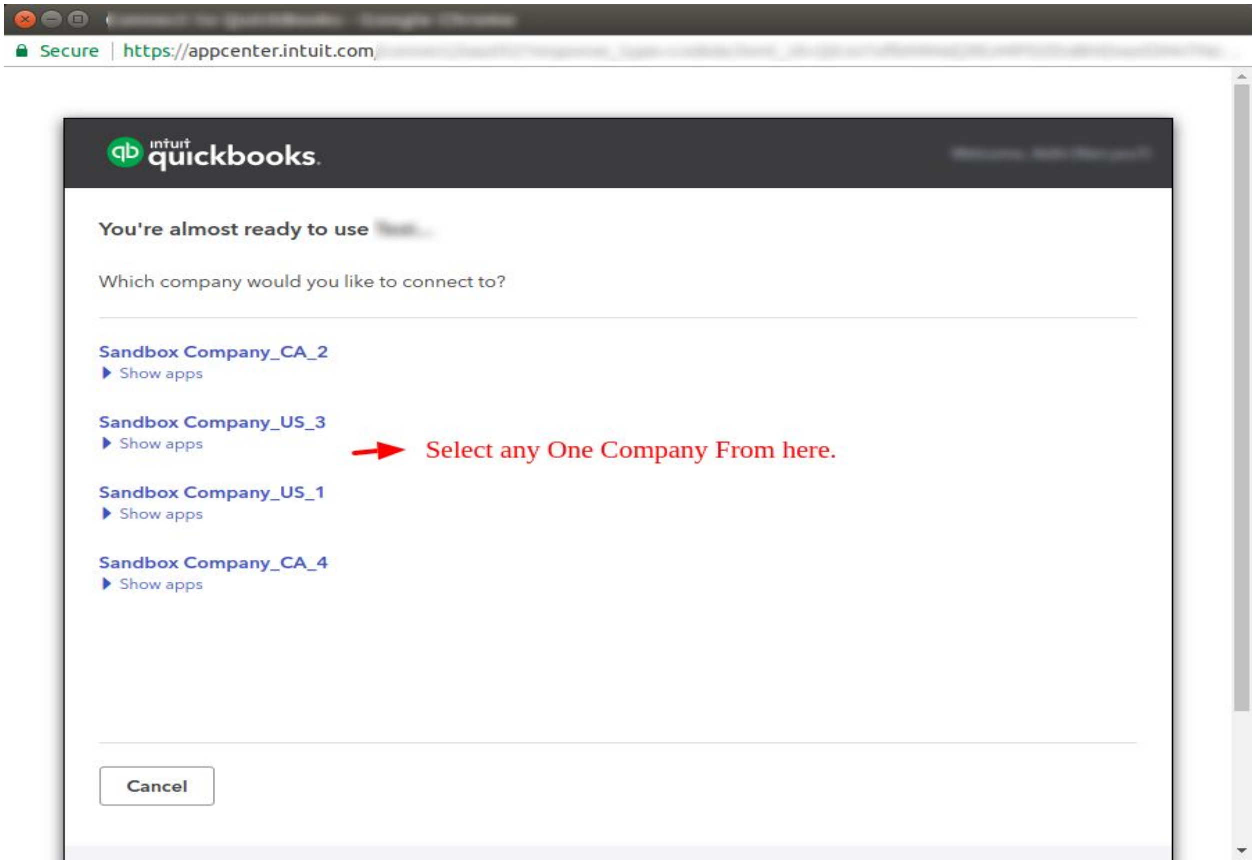
(Screenshot 2)

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



(Screenshot 3)

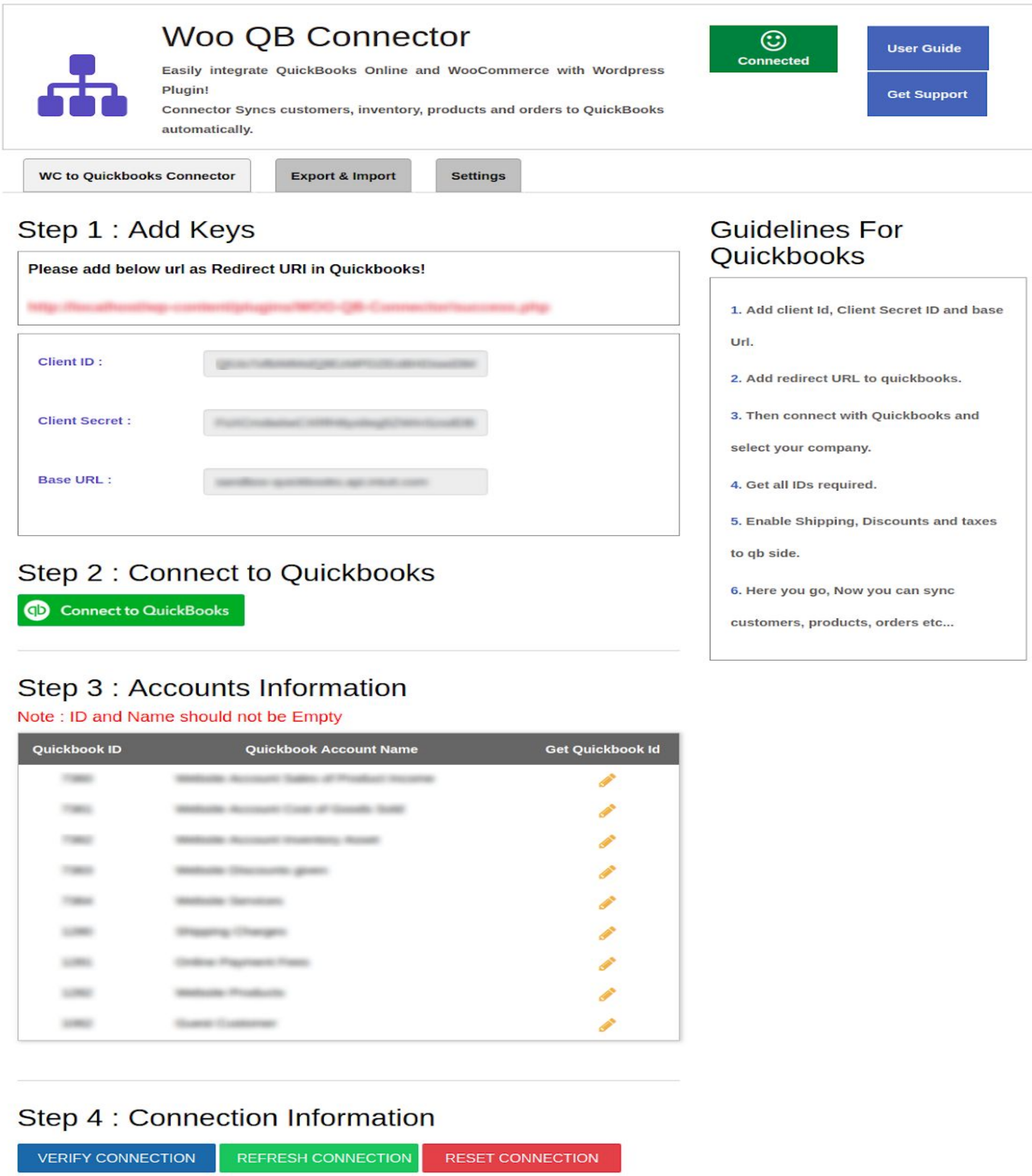
- After connection popup will appear there you have to select company in your qb account and authorize your connection. (Refer Screenshot 4)



(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).



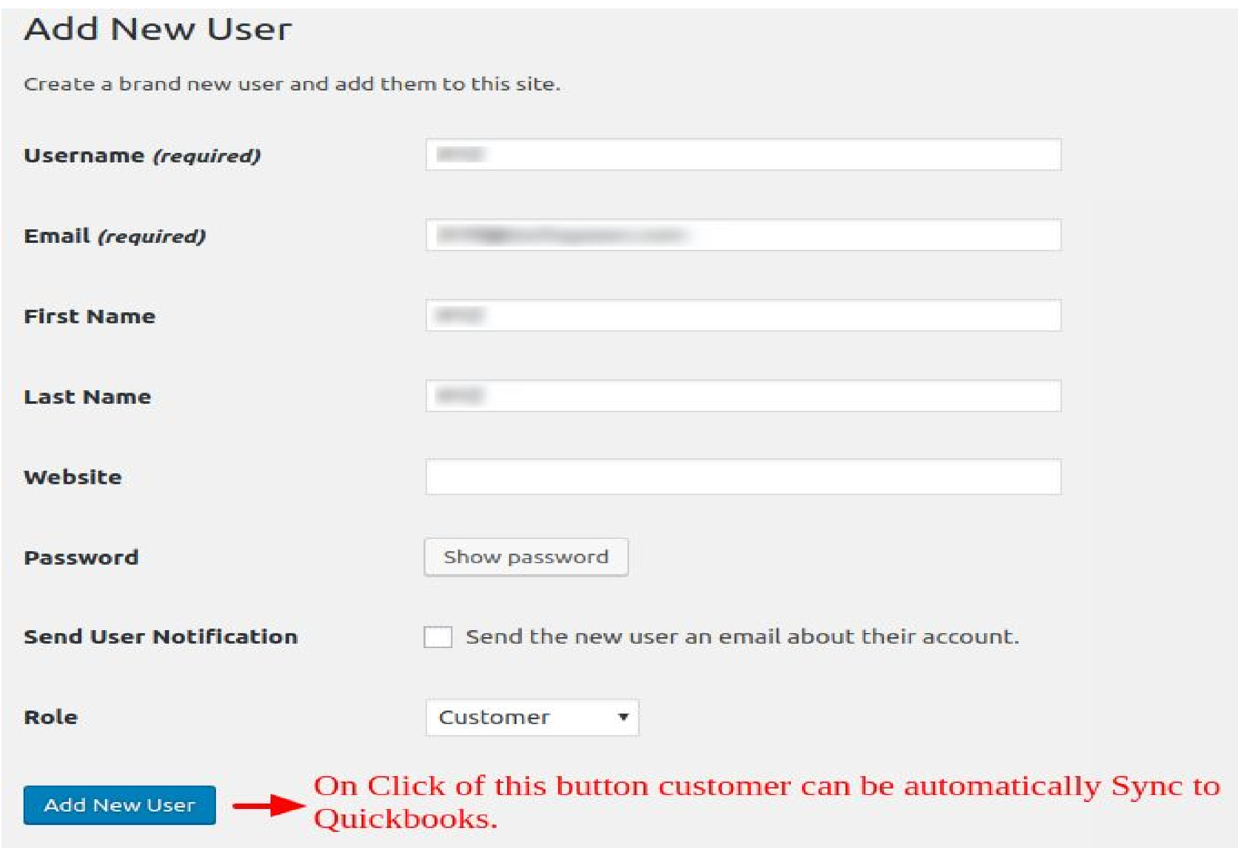
(Screenshot 5)

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 :

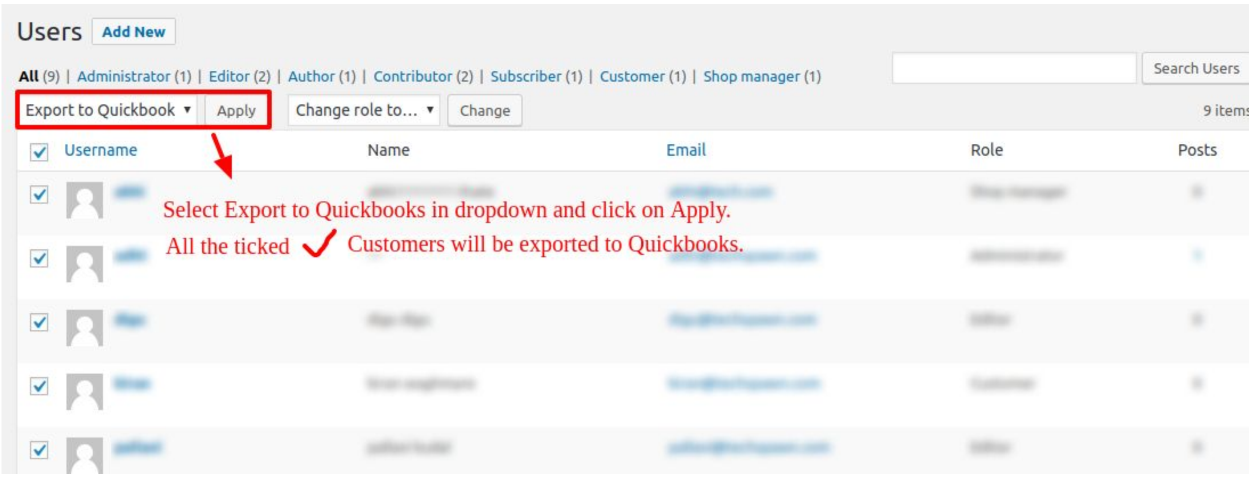
- Go To Users -> Add New.
- You can Sync single Customer automatically (i.e real time Sync) when it is created (Refer Screenshot 7).



(Screenshot 7)

- Go To Users page.

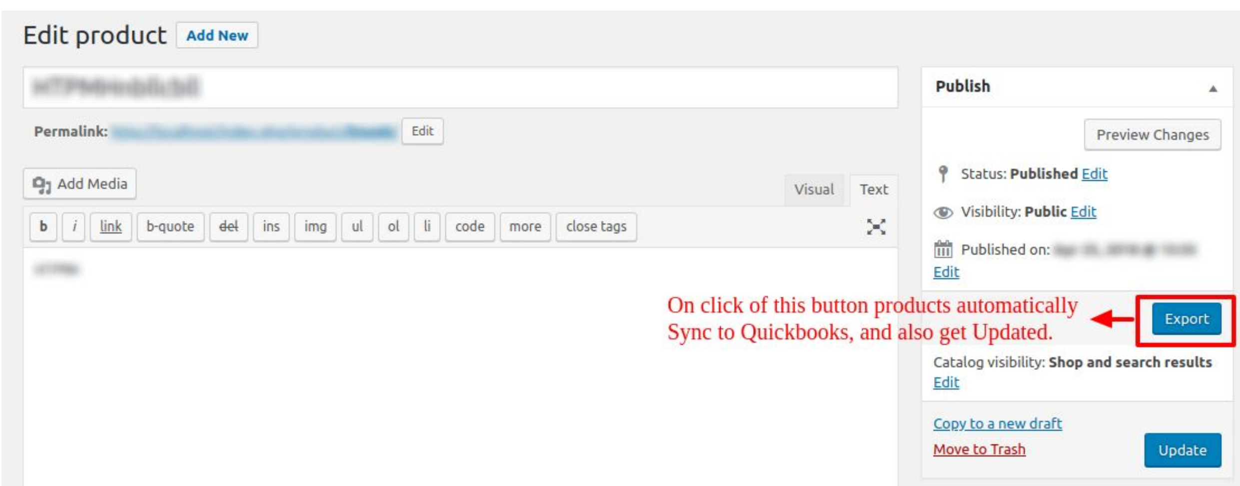
- Multiple Customer can be Sync from Bulk action menu (i.e manually Sync) (Refer Screenshot 8).



(Screenshot 8)

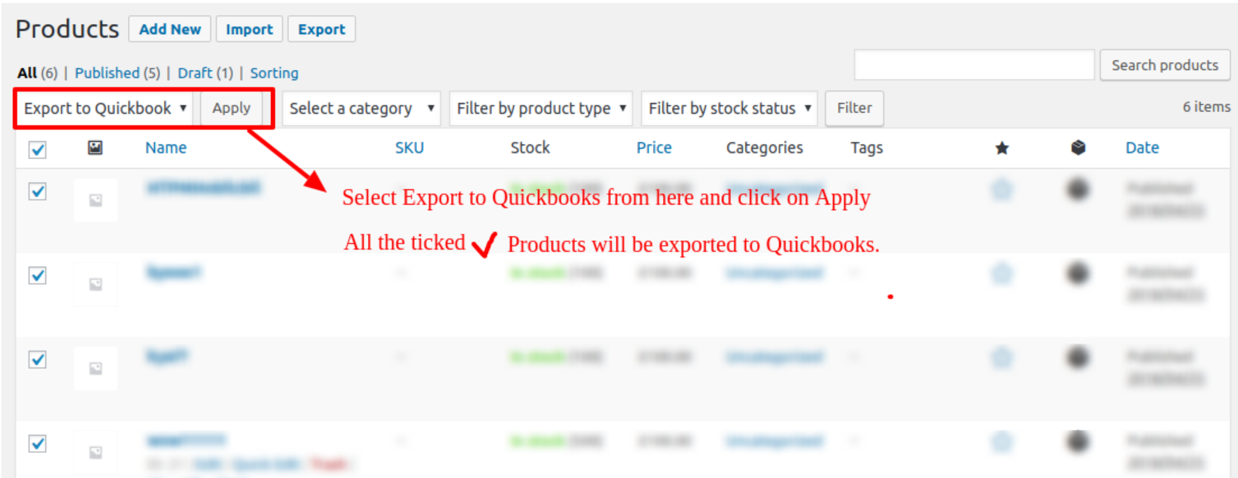
2. Product Sync :

- 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)

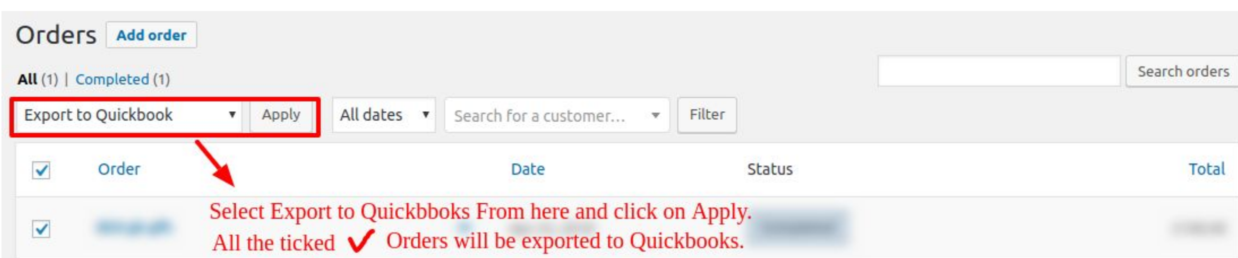
- Go To Product page
- Multiple Product can be Sync from Bulk action menu (i.e manually Sync) (Refer Screenshot 10).



(Screenshot 10)

3. Order Sync

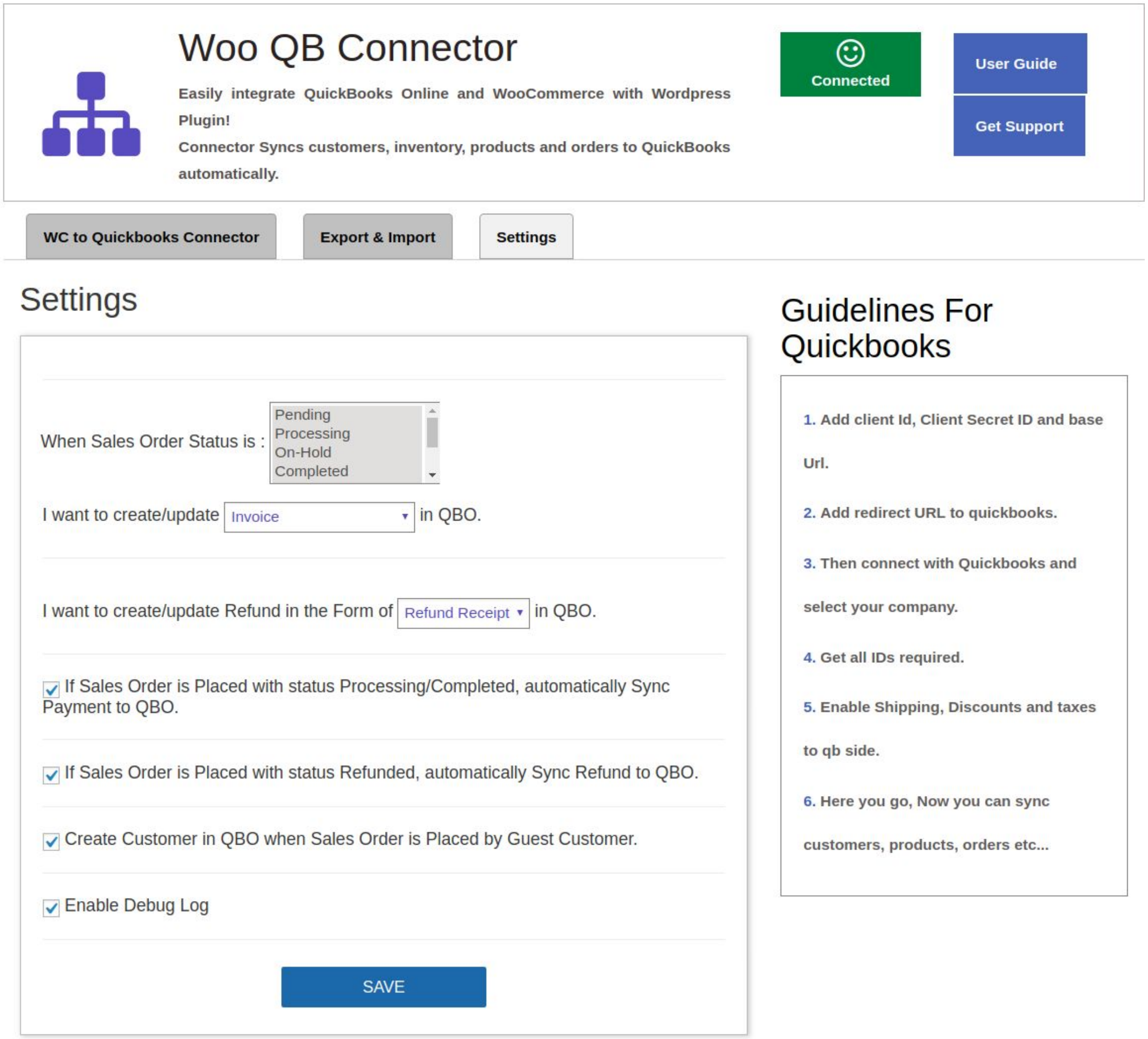
- You can Sync single Order automatically (i.e real time Sync) when it is created by User.
- Go To WooCommerce -> Orders page.
- Multiple Order can be Sync from Bulk action menu (i.e manually Sync) (Refer Screenshot 11).



(Screenshot 11)

4. Rules For Sales Order :

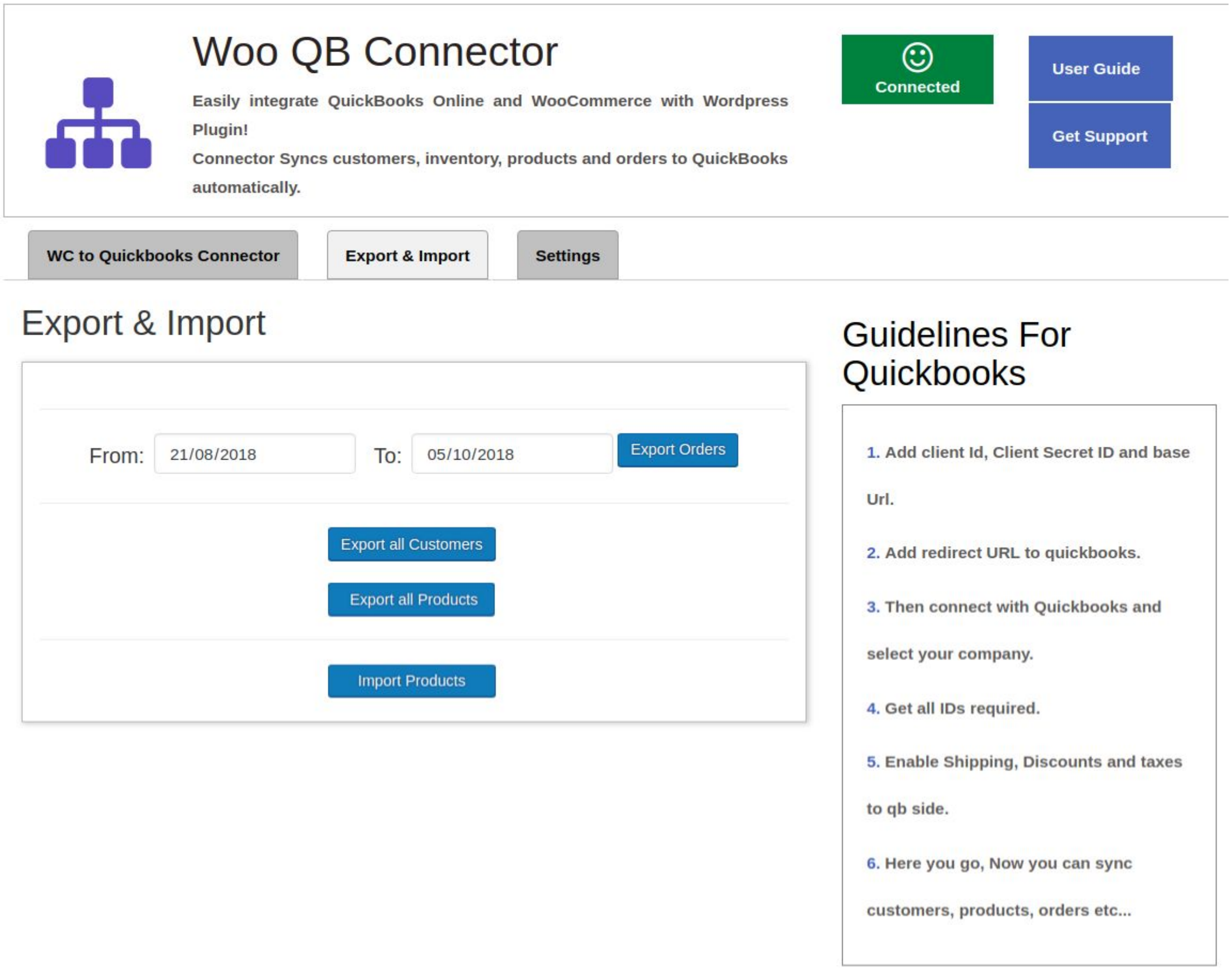
- Go to WP to Quickbooks Connector -> Settings.
- This settings is used to sync your sales order according to the status and you have to select the form in which you want to sync your sales order in the future.
- Default values are set to ‘Processing’ and ‘Invoice’. (Refer Screenshot 12)



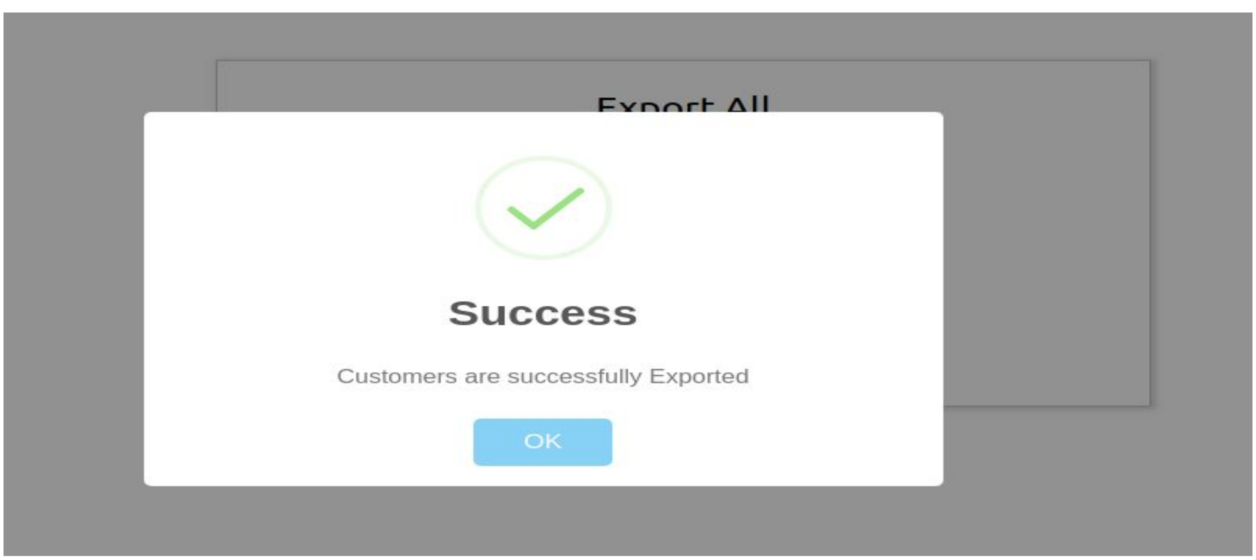
(Screenshot 12)

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).

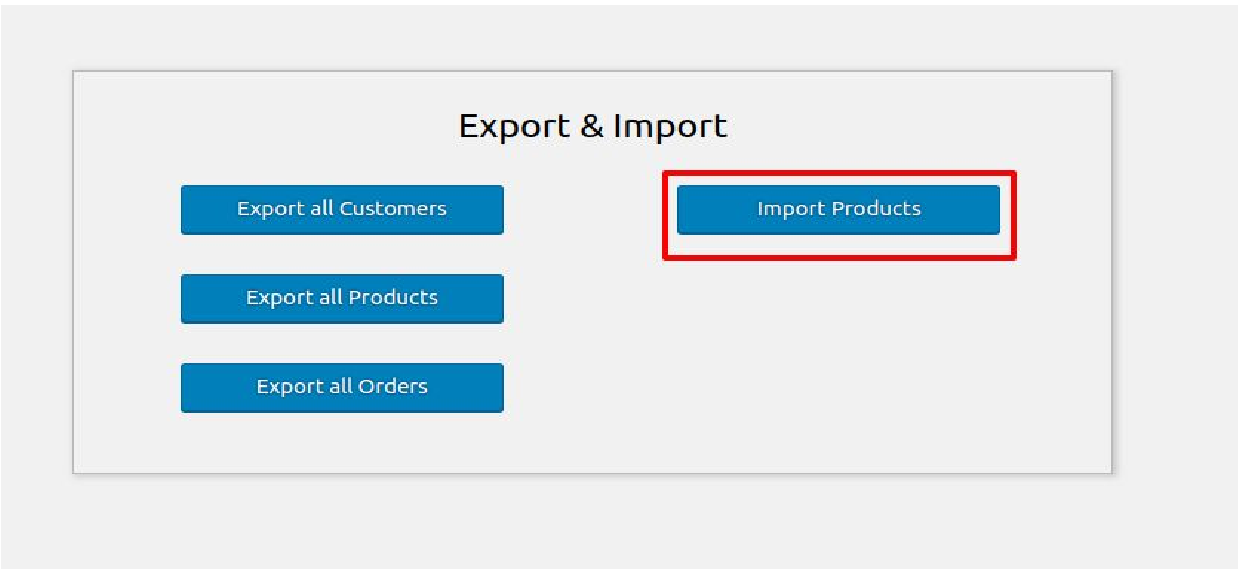


(Screenshot 13)



(Screenshot 14)

6. Import All Products :

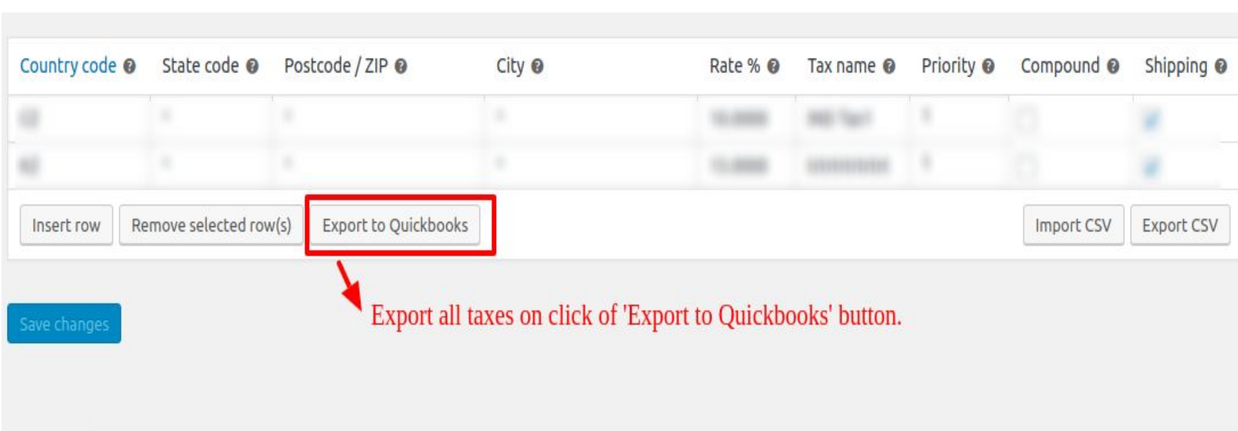


(Screenshot 15)

- 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.