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# *PDG Software*

## *QuickBooks Financial Guide*

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PDG Software, Inc.  
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# QuickBooks Financial Guide

*Synchronizing QuickBooks Financial with PDG Commerce using QuickBooks Web Connector*

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**T**his guide assumes that you have the US version of QuickBooks Financial and Accounting software version 2006, 2007, or 2008 installed on your local computer. This guide also assumes that your local computer is connected to the Internet, and that your web site has a secure connection (access with https). If you require assistance installing QuickBooks Financial Software, please contact Intuit technical support.

The versions of QuickBooks Financial Software currently supported by the PDG Commerce integration are Pro, Premier, Premier Accountant, and Enterprise.

## Introduction

In addition to PDG's integration of QuickBooks Merchant Services and QuickBooks Point of Sale software, PDG merchants can connect their PDG Commerce enabled store directly with QuickBooks Financial and Accounting solutions.

Synchronization between QuickBooks and PDG Commerce provides a simple way for QuickBooks merchants to sell their goods online. Product information, inventory status and pricing are all updated from your QuickBooks application to your PDG enabled storefront. All web order information, including all customer information, products ordered, sales tax and shipping costs is automatically created within QuickBooks.

## Overview

The initial synchronization between QuickBooks and PDG Commerce will import all of your products from QuickBooks to the PDG Commerce program on your web site.

After the initial synchronization, all subsequent updates will follow the same process. First, all orders placed through PDG Commerce since the last synchronization will be imported to QuickBooks . Second, all products added to QuickBooks since the last synchronization will be imported to PDG Commerce.

## Getting Started

Before you begin the setup of PDG Commerce to use the QuickBooks Web Connector, you should visit the QuickBooks Financial page on the PDG Software web site, located at the following address:

**<http://www.pdgsoft.com/partners/quickbooks.htm>**

On the left side of this page, you will find a video that offers an overview of the integration between QuickBooks and PDG Commerce. This video will briefly explain the synchronization process. On the right side of this page, you will find a training video that walks you through setting up the real-time synchronizations between QuickBooks and PDG Commerce. You can use this guide as a companion to the training video, as they cover the same information and instructions.

If you have further questions about configuring the integration between QuickBooks and PDG Commerce after watching the training video, please contact PDG technical staff.

## Considerations

If you are using QuickBooks Merchant Services in QuickBooks and on your web site, and would like to use the reconciliation functionality provided in QuickBooks, you must use QuickBooks version 2007 or 2008. You will also need to configure your PDG Commerce program to import online payment orders as sales receipts.

Each time the QuickBooks Web Connector synchronizes your QuickBooks company with PDG Commerce, products will be updated and orders will be imported. During a regular synchronization, physical inventory totals will not be updated in PDG Commerce. In order to update physical inventory totals, all products will need to be updated during the synchronization process. You can configure PDG Commerce to always update all products, but you should note that the time required for the synchronization to occur will increase. If you decide not to update all products during every synchronization, then the

physical inventory totals will always be correct in your QuickBooks company (including web sales), but will not be updated in your PDG Commerce program.

**Note:** Some features of the PDG Commerce application may not be compatible with other features or with third party integrations. If you have any questions about the compatibility of features or programs, or if you encounter any problems with your specific configuration, please contact PDG technical staff for assistance.





# Configure QuickBooks Financial

*Configure QuickBooks Financial to synchronize with PDG Commerce Administrator using QuickBooks Web Connector*

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**T**his chapter explains how to properly configure your QuickBooks Financial and Accounting software to communicate with your PDG Commerce Administrator using the QuickBooks Web Connector tool.

## Getting Started

Before you begin making changes to your QuickBooks Financial software, you should save a backup of your company file. To do that, open your company file in QuickBooks. Under the File menu, choose “Back Up...” A window will be displayed with back up options. Specify where you would like to save the backup file, then click ‘OK.’

## Set Up QuickBooks

Before you can import orders into QuickBooks Financial software, you must first configure QuickBooks to allow orders to be imported. Open your company file, and switch to single-user mode (if not in this mode already). You can accomplish this under the File menu.

## Configure Taxes

In Single User mode, choose "Preferences" from the Edit menu. On the left side of the preferences dialog box, scroll down and click "Sales Tax." Select the "Company Preferences" tab along the top of the dialog box.

**Note:** If you do not charge any tax, you will not need to make any changes to the sales tax portion of your company file, so you can skip this section.

You will need to select a common sales tax on the lower half of the dialog box. If you are charging tax to specific locations, but not to all locations, you must enter a 0.0% tax in addition to any other taxes you charge. If you charge tax to all locations, you do not need to enter a 0.0% tax, but must enter all other taxes that you charge. All tax percentages included in the orders that are to be imported must have a corresponding tax configured in QuickBooks.

In this example, sales tax will only be charged for items shipping to Georgia. The sales tax item in QuickBooks is named “GA Sales Tax.”

**Note:** A non-zero tax must have a Tax Vendor (such as Georgia Department of Revenue) associated with it in your QuickBooks company file. A zero tax does not charge tax and therefore does not need to have an associated Tax Vendor.

Since the example company will only charge sales tax for Georgia, an additional sales tax item that charges 0.0% tax is required. Thus, there are two tax items defined.

Name	Description	Type	Account	On Hand	Price
GA Sales Tax	Sales Tax	Sales Tax I...	Sales Tax Pa...		7.0%
Out of State	Out-of-state sale, exempt from sales tax	Sales Tax I...	Sales Tax Pa...	0.00	0.0%

## Configure Shipping Item

In order for orders to be imported with shipping costs from PDG Commerce to your QuickBooks company file, you will need to create a catch-all item for shipping.

**Note:** If you do not charge shipping costs in your web store, you will not need to create a shipping item, so you can skip this section.

## Configure Discount Item

In order for orders to be imported with applied discounts from PDG Commerce to your QuickBooks company file, you will need to create a catch-all item for discounts.

**Note:** If you do not offer discounts in your web store, you will not need to create a discount item, so you can skip this section.



# Configure PDG Commerce Administrator

*Configure PDG Commerce Administrator to synchronize with QuickBooks Financial using QuickBooks Web Connector*

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**T**his chapter explains how to properly configure your PDG Commerce Administrator to communicate with your QuickBooks Financial software using the QuickBooks Web Connector tool.

## Getting Started

To access the QuickBooks Web Connector settings in your PDG Commerce Administrator, your Commerce program will need to be on patch 4.70.01.101 or higher. To upgrade, visit

**[http://www.pdgsoft.com/Download/Comm\\_upgrade.html](http://www.pdgsoft.com/Download/Comm_upgrade.html)**

**Note:** Even if your PDG Commerce patch level includes the "QuickBooks" section in your Commerce Administrator, PDG Software suggests that you upgrade to the latest available patch before configuring the QuickBooks settings.

Once you have upgraded your program, log into your Commerce Administrator securely (using https:// in the web address), and select the "Secure" option on the Main Menu. In the "Complete URL to a SSL Secure PDG Commerce Executable" field on this page, enter the location of the PDG Commerce executable on your secure server. The entry in this field should look similar to the following, replacing www.webstorename.com with your web site's domain name.

**<https://www.webstorename.com/cgi-bin/commerce.cgi>**

Once you have entered this information, click the 'Submit Changes' button on the page.

Return to the Main Menu, and select the "QuickBooks" option.

**QuickBooks Connection/Synchronization Types**

Active QuickBooks Web Connector Setup:

- QuickBooks Financial
- QuickBooks POS

[Update Active Web Connector Setup](#)

**General QuickBooks Settings**

[QuickBooks POS using Web Connector](#)

[QuickBooks Financial using Web Connector](#)

[QuickBooks Financial Using PDG Accounting Accelerator](#)

[QuickBooks Web Connector Detail Log](#)

QBWC Active Session Status: QBWC Session Does Not Exist

Server Time Adjustment: (0 mins)  
 Current Server Time: 2008-01-30T09:48:39-05:00(2008-01-30T14:48:39+0:00)  
 Adjusted Server Time: 2008-01-30T09:48:39-05:00(2008-01-30T14:48:39+0:00)  
 Local Computer Time: 2008-01-30T09:48:39-05:00(2008-01-30T14:48:39+0:00)

[Synchronize Server/Desktop Times](#)

Synchronization status: [Reload All Products](#)

**QuickBooks Failed Orders**

Select: [All](#) [None](#)

None located

## QuickBooks

On the page that is displayed, you will need to select the appropriate QuickBooks program for use with the QuickBooks Web Connector, and access the appropriate settings page.

## QuickBooks Connection/Synchronization Types

In this section, select the "QuickBooks Financial" option, and click the 'Update Active Web Connector Setup' button. Please note that you can only change this setting if you are logged in securely.

**QuickBooks Connection/Synchronization Types**

Active QuickBooks Web Connector Setup:

- QuickBooks Financial
- QuickBooks POS

[Update Active Web Connector Setup](#)

## General QuickBooks Settings

To access the QuickBooks Web Connector settings for QuickBooks, click the "QuickBooks Financial using Web Connector" link in the "General QuickBooks Settings" section of this page.

**General QuickBooks Settings**

[QuickBooks POS using Web Connector](#)

[QuickBooks Financial using Web Connector](#)

[QuickBooks Financial Using PDG Accounting Accelerator](#)

[QuickBooks Web Connector Detail Log](#)

QBWC Active Session Status: QBWC Session Does Not Exist

Server Time Adjustment: (0 mins)  
 Current Server Time: 2008-01-30T09:48:39-05:00(2008-01-30T14:48:39+0:00)  
 Adjusted Server Time: 2008-01-30T09:48:39-05:00(2008-01-30T14:48:39+0:00)  
 Local Computer Time: 2008-01-30T09:48:39-05:00(2008-01-30T14:48:39+0:00)

[Synchronize Server/Desktop Times](#)

Synchronization status: [Reload All Products](#)

You can view any specific configuration page linked from this section even if it is not your active QuickBooks Web Connector program. In this case, QuickBooks Financial is your active QuickBooks Web Connector program.

The **QuickBooks POS using Web Connector** link will display the QuickBooks Point of Sale configuration page. Please note that you may not configure PDG Commerce to use the QuickBooks Web Connector program with both QuickBooks Point of Sale and QuickBooks Financial at the same time.

If you are using both programs, you should integrate PDG Commerce with QuickBooks Point of Sale, and then configure QuickBooks Point of Sale to communicate with QuickBooks Financial. If you require assistance with that configuration, you should contact Intuit.

The **QuickBooks Financial using Web Connector** link will display the QuickBooks Financial configuration page. This is the same page that is displayed by clicking the 'Update Active Web Connector Setup' button in the previous section.

The **QuickBooks Financial Using PDG Accounting Accelerator** link will display the PDG Accounting Accelerator settings page. The PDG Accounting Accelerator is a legacy program for PDG Commerce, as it has been replaced by the ability to connect to QuickBooks Financial using the QuickBooks Web Connector.

The **QuickBooks Web Connector Detail Log** link will display a page that will assist in troubleshooting import problems. You can find an explanation of this log in the "Troubleshooting" section of the "Use QuickBooks Web Connector" chapter of this guide.

The **QBWC Active Session Status** field indicates whether or not an active session exists. If the QuickBooks Web Connector program was interrupted or failed for any reason, an active session may be left open. If you are not currently running the QuickBooks Web Connector program, but this field indicates that an active session exists, you will need to stop the active session before you can begin another one. To stop an active session, click the 'Reset Active Session' button when the QuickBooks Web Connector program is closed. PDG Commerce will display the message "QBWC Session Does Not Exist" when an active session does not exist.

PDG Commerce only allows one QuickBooks Web Connector update at a time. The active session should only exist when the QuickBooks Web Connector is communicating with the PDG Commerce program on your web site. If the connection is closed, but this section of your Commerce Administrator indicates that there is an active session, you should click the 'Reset Active Session' button before attempting to begin another synchronization.

The **Server Time Adjustment** field allows you to determine if your Current Server Time and Local Computer Time are the same. This setting is necessary if you will be running the QuickBooks Web Connector program at an interval to synchronize your QuickBooks company with your PDG Commerce web store. If the times do not match, click the 'Synchronize Server/Desktop Times' button. At that point, you will see this portion of the page updated. The Current Server Time and Local Computer Time will be the same, with the Adjusted Server Time displaying the modified server time.

The **Synchronization status** field indicates whether or not all products will be checked on the next synchronization. If this field displays the text "Ready to download products!," then all products will be checked on the next synchronization. If this field displays the 'Reload All Products' button, then only new or modified products will be checked for product updates. Click the 'Reload All Products' button to specify that all product should be checked on the next synchronization.

## QuickBooks Failed Orders

In this section, you will see orders that failed to import to your QuickBooks company, along with error messages if applicable. From this location, you can remove orders from the failed list, or restore them to attempt the order import again.



## Resetting Product Import

If you need to clear your progress and restart the product import through the QuickBooks Web Connector, there are three steps:

1. Close the QuickBooks Web Connector program, then click the 'Reset Active Session' button on the main QuickBooks page in your Commerce Administrator.
2. Click the 'Reload All Products' button on the main QuickBooks page in your Commerce Administrator.
3. Select "Maintenance" from the Main Menu of your Commerce Administrator. Click the "Permanently Delete All Products from the Database" link, then click the "Permanently Delete All Product Categories from the Database" link. Click 'OK' for each delete to verify.

**Note:** This action will delete all product data. It is recommended that you export your products to a CSV file prior to deleting all products and categories. You can find instructions for exporting to a CSV file in the PDG Software Importing/Exporting Guide, available for download at <http://www.pdgsoft.com/docs/ImportExport.pdf>.

## QBWC for QuickBooks Financial Settings

When you click the 'Update Active Web Connector Setup' button or the "QuickBooks Financial using Web Connector" link on the main QuickBooks page in your Commerce Administrator, the "QBWC for QuickBooks Financial Settings" page will be displayed. On this page, you will need to enter the appropriate data in each field to connect your PDG Commerce Administrator to your QuickBooks Web Connector.

### QBWC for QuickBooks Financial Settings

In this section of the page, you will enter the information necessary to connect to your QuickBooks Web Connector, as well as your preferences for order importing to your QuickBooks Financial software.

QBWC for QuickBooks Financial Settings	
<a href="#">Download the QuickBooks Web Connector</a>	
<a href="#">Download PDG Web Connector Configuration File(*.qwc)</a>	
QuickBooks Web Connector User:	<input type="text" value="test"/>
QuickBooks Web Connector Password:	<input type="text" value="testing"/>
QuickBooks Financial Company File:	<input type="text" value="Files\PDG Demo.QBW"/>

If you have not already downloaded and installed the QuickBooks Web Connector program, you may access it by clicking the **Download the QuickBooks Web Connector** link at the top of this section.

Clicking this link will open a new window allowing you to download the installer program for QuickBooks Web Connector. You should download and install this file to your QuickBooks computer.

The **Download PDG Web Connector Configuration File(\*.qwc)** link should be clicked after you have entered all settings on this page. Make sure that you click the 'Submit Changes' button, and the page is refreshed displaying your saved changes before you click this link, otherwise you will receive an incomplete file. When prompted to download the file (named pdg-fs.qwc), save it to your computer. This file can be deleted after the application has been successfully added to your QuickBooks Web Connector program.

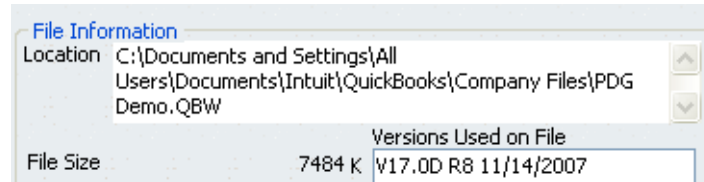
You should create a username for the **QuickBooks Web Connector User** and enter it in this field.

You should create a password for the **QuickBooks Web Connector Password** and enter it in this field. Record this password for later use.

**Note:** The user and password configured in these fields will be used to authenticate your connection to the web site when using the QuickBooks Web Connector. This user and password are not connected to your current QuickBooks user accounts.

The **QuickBooks Financial Company File** is the filename and location of your QuickBooks company file. To obtain this information, open your

QuickBooks company, and press the F2 key on your keyboard. The Product Information window will appear. In the “File Information” section of this window, you will see the filename and location of your QuickBooks company. Copy this information.



Enter this information in the “QuickBooks Financial Company File” field in your Commerce Administrator, noting that the case and spacing must exactly match the information in the Product Information window of QuickBooks.

**Note:** If you are opening a company file saved on another computer, you must enter the filename and location relative to that computer. You may be connecting through a network name, or a mapped drive letter. The correct path should be displayed in the Product Information window of QuickBooks.

## QBWC for Quickbooks Order Settings

In this section of the page, you will enter the information necessary to import orders from PDG Commerce to your QuickBooks company.

**QBWC for Quickbooks Order Settings**

Import all orders as:

- Invoices
- Sales Orders (Verify your QB version supports this feature)
- Sales Receipts
- Estimates
- Based on Payment Type

Please select offline order type for 'Based on Payment Type' option:

Name for the 'no tax' (0% rate) Sales Tax:

Item name for shipping charges:

Item name for discounting charges:

Set 'IsPending' for orders that have backordered items:   
This setting is only available for Invoices and Sales Receipts

The **Import all orders as** selection allows you to set how orders will be imported into your QuickBooks company file. The "Invoices" option will import all orders as invoices. The "Sales Orders" option will import all orders as sales orders. The "Sales Receipts" option will import all orders as sales receipts. The "Estimates" option will import all orders as estimates. The "Based on Payment Type" option will import online credit card orders as sales receipts, and offline payment methods according to your selection in the next field. If you are using QuickBooks Merchant Services as your online payment gateway, you will need to select either “Sales Receipts” or “Based on Payment Type” if you want to obtain the transaction details per order necessary to reconcile your accounts in QuickBooks.

**Note:** Sales orders are not available in all versions of QuickBooks. If you select "Sales Orders" in this field, you should verify that your version of QuickBooks supports this feature.

If you selected “Based on Payment Type” in the “Import all orders as” field, you will need to make a selection in the **Please select offline order type for 'Based on Payment Type' option** field. This field determines how to import orders placed with offline payment methods, such as a “mail check” or “purchase order” option. The “Invoice” option will import all offline payment orders as invoices. The “Sales Order” option will import all offline payment orders as sales orders. The “Estimate” option will import all offline payment orders as estimates.

**Note:** Sales orders are not available in all versions of QuickBooks. If you select "Sales Order" in this field, you should verify that your version of QuickBooks supports this feature.

In the **Name for the 'no tax' (0% rate) Sales Tax** field, enter the exact name of the sales tax item you created in your company file in the previous chapter. In this example, the tax is named “Out of State.” To ensure that the case and spacing exactly match the Item name in QuickBooks, you can edit the item and copy the “Sales Tax Name” field.

In the **Item name for shipping charges** field, enter the exact name of the shipping item you created in your company file in the previous chapter. In this example, the shipping item is named “Shipping.” To ensure that the case and spacing exactly match the item name in QuickBooks, you can edit the item and copy the “Item Name/Number” field.

In the **Item name for discounting charges** field, enter the exact name of the discount item you created in your company file in the previous chapter. In this example, the discount item is named “Discount.” To ensure that the case and spacing exactly match the item name in QuickBooks, you can edit the item and copy the “Item Name/Number” field.

If you will be allowing customers to purchase items in your web store that are on back order, you may want to check the **Set 'IsPending' for orders that have backordered items** box. This setting will flag an item as pending on imported orders and sales receipts.

## QBWC for Quickbooks Product Settings

In this section of the page, you will enter the information necessary to synchronize product inventory with QuickBooks, as well as your preferences for importing your QuickBooks products to PDG Commerce.

In the **Product Category Specification** field, select how you would like the products to be grouped as they are imported from QuickBooks. Please note that items with a zero price will not be imported as individual items, and inactive products will not be imported. In this example, the products are defined in QuickBooks in the following format.

Name	Description	Type	Account	On Hand	Price
◊ A000	Gadgets and Widgets	Inventory...	Merchandis...	0	0.00
◊ A0001	Small gadget	Inventory...	Merchandis...	10	5.00
◊ A0002	Huge Widget	Inventory...	Merchandis...	5	25.00
◊ B000	Sample Items	Non-inve...	Merchandis...		0.00
◊ B00012	Sample 12	Non-inve...	Merchandis...		12.00
◊ B00022	Sample 22	Non-inve...	Merchandis...		22.00

The "Use QuickBooks Item types for categories" option will create up to five categories, based on the types assigned to your items. The five available types for import to PDG Commerce are service, inventory item, non-inventory item, assembly, and group. In this example, products A0001 and A0002 will be imported to a product category named "Inventory Items," while B00012 and B00022 will be imported to a product category named "Non Inventory Items."

The "Use QuickBooks top level items as categories" option will import all top level items in QuickBooks as product categories in PDG Commerce. If the items have a zero price in QuickBooks, they will not be imported as individual items to PDG Commerce. In this example, A000 and B000 will be created as product categories. Items A0001 and A0002 will be created as individual products located within the A000 category, and items B00012 and B00022 will be created as individual products located within the B000 category.

The "Do not create categories - import as inactive products" option will import all items to the "Inactive Product Category" in PDG Commerce. This option will ensure that new products are not made available for purchase on your web store at the time of synchronization, although they are maintained in your PDG Commerce Administrator. You can move them to an active category at any time after the synchronization with your QuickBooks company file is completed. In this example, products A0001, A0002, B00012, and B00022 will be imported to the "Inactive Product Category."

**Note:** Products imported to the Inactive Product Category will not be available for purchase on your web site until they are moved to an active category. If you are planning on selling over 50% of the products imported from your QuickBooks company file on your web store, you should not select this option.

The "Use one category - import all products into a single category" option will create a product category named "Products," and all items will be imported to that category in PDG Commerce. In this example, products A0001, A0002, B00012, and B00022 will be imported to the "Products" category.

In the **Choose what product types to import** field, select the item types to import. You may choose "Service," "Inventory Item," "Non-Inventory Item," "Assembly," and "Group." You may select multiple item types to specify the items to import. There are more than five item types in QuickBooks, but only these five may be imported to PDG Commerce at this time.

In the **Product code/SKU/reference number** field, select the format in which you would like the products to be imported. PDG Commerce assigns a field to each product named "Product Code." This code is a unique identifier that PDG Commerce uses to reference the product. The "Use QuickBooks Name for Product Code" option will assign the information entered in the "Item Name/Number" field of QuickBooks to the "Product Code" field in PDG Commerce. The "Use Unique Number for Product Code" option will assign a unique number as the "Product Code" for each product, beginning with 1.

The **Replace bad characters with** field is used if you selected "Use QuickBooks Name for Product Code" in the "Product code/SKU/reference number" field. Certain characters are not allowed in the "Product Code" field of PDG Commerce, such as certain punctuation marks, and spaces. These characters will be replaced when imported to PDG Commerce. If you leave this field blank, PDG Commerce will use a dash (-) by default. If you prefer to use another character, you should enter it in this field. If the character you enter in this field is a bad character for the "Product Code" field, PDG Commerce will use a dash. For example, a product with an item name of "Small Gadget" in QuickBooks would be imported with a product code of "Small-Gadget."

The **Account for internet products that are added to QuickBooks** field refers to products you may create in PDG Commerce that do not already exist in QuickBooks, such as gift certificates. If a customer orders an item available on the web store that does not exist in QuickBooks, it must be added to QuickBooks when the order is imported. In this case, items are imported to QuickBooks as non-inventory items. In this field, you should enter the account in QuickBooks to which these products should be assigned.

In the **Default inventory settings for inventory items** field, you can determine how PDG Commerce should handle products that are out of stock. You can choose whether or not to display out of stock items in your web store's product lists, and also whether or not to allow backordering for out of stock products.

## QBWC for Quickbooks Image Settings

This section allows you to specify how image paths should be created for products imported to your PDG Commerce program. In these fields you will specify the image path and image file type to be used during this process. Once changes are submitted, you will then see an example file name populated to indicate the way in which image paths will be created.

The image name will be based on your entry in the “Product code/SKU/reference number” field. If you have selected “Use QuickBooks Name for Product Code,” the image names must match the QuickBooks name for the product. If you have selected “Use Unique Number for Product Code,” the image names must match the unique number assigned to each product by PDG Commerce.

If any bad characters are encountered in the product codes for the images, PDG Commerce will use the entry in the “Replace bad characters with” field as the convention for replacing bad characters. If that field is left blank, bad characters will be replaced with a dash.

**Note:** The current versions of QuickBooks Financial software do not store images for products, and will not import images to PDG Commerce. You will need to upload images to your web server through FTP in order to add images using these fields. The images should be uploaded with the appropriate file name according to your settings, and should all use the same file extension (e.g., .gif, .jpg, or .png).

QBWC for Quickbooks Image Settings	
Set image file:	Image directory path: /images/
Example: /images/{code/SKU/reference number}.jpg	Image file name source: use code/SKU/reference number
	Image file name extension: .jpg
Set thumbnail image file:	Thumbnail image directory path: /images/
Example: /images/{code/SKU/reference number}.jpg	Thumbnail image file name source: use code/SKU/reference number
	Thumbnail image file name extension: .jpg

In the **Set image file** section, you will need to enter three fields. In the **Image directory path** field, enter the file path from the root directory of your web site to access the full size images in the Directory path for full size image field. For example, if the main folder of your web site contains a folder named images, you should enter /images/. You will need to enter both slashes as they appear in this example. In the **Image file name source** field, select "use code/SKU/reference number" if you would like to specify image paths, or select "I do not want to use images" if you do not want to specify image paths at this time. In the **Image file name extension** field, enter the file extension to be used for all of the full size images. You will need to enter a period before the extension in this field, such as .jpg, .gif, or .png.

**Note:** For UNIX servers, the image filenames and directory paths will be case-specific.

In the **Set thumbnail image file** section, you will need to enter three fields. In the **Thumbnail image directory path** field, enter the file path from the root directory of your web site to access the full size images in the directory path for full size image field. For example, if the main folder of your web site

contains a folder named images, you should enter /images/. You will need to enter both slashes as they appear in this example. In the **Thumbnail image file name source** field, select "use code/SKU/reference number" if you would like to specify image paths, or select "I do not want to use images" if you do not want to specify image paths at this time. In the **Thumbnail image file name extension** field, enter the file extension to be used for all of the full size images. You will need to enter a period before the extension in this field, such as .jpg, .gif, or .png.

**Note:** For UNIX servers, the thumbnail filenames and directory paths will be case-specific.

## QBWC Account Settings

This section allows you to specify to which account online orders should post when they are imported into QuickBooks.

QBWC Account Settings	
Account to deposit sales orders/Invoices:	<input type="text" value="Merchandise Sales"/>
Account to deposit sales receipts:	<input type="text" value="Merchandise Sales"/>

In the **Account to deposit sales orders/Invoices** field, enter the account to which offline payment orders should post when they are imported to QuickBooks. If you are not importing any orders as sales orders, invoices, or estimates (you made this selection in the "Import all orders as" field), you may leave this field blank.

In the **Account to deposit sales receipts** field, enter the account to which online payment orders should post when they are imported to QuickBooks. If you are not importing any orders as sales receipts (you made this selection in the "Import all orders as" field), you may leave this field blank.

## Advanced Settings

To access the Advanced Settings sections of the page, click the "Advanced Settings" link at the bottom of the page. This section allows you to configure advanced settings and information for the QuickBooks connection. Please contact PDG Software technical support if you require further assistance with these settings.

Advanced Settings	
QuickBooks Financial Log file:	<input type="text" value="qbfs.log"/>

In the **QuickBooks Financial Log** file field, enter the name of the file to which you want QuickBooks synchronizations logged. The location is assumed to be relative to the PDG\_Commerce directory on your web site. PDG Commerce will automatically create this file with the name you specify here when the first synchronization takes place.

**Note:** PDG Software suggests saving a copy of the log file then deleting it after performing the first synchronize with your web store. The initial log file may be very large.

## Advanced Order Settings

In this section of the page, you can enter advanced information specifying how orders should be imported from PDG Commerce to your QuickBooks company

Advanced Order Settings	
Set invoice number to the QuickBooks Purchase Order: <small>checking this box will let QuickBooks create the order number</small>	<input checked="" type="checkbox"/>
Set 'to be printed' for new orders:	<input checked="" type="checkbox"/>
Set class for orders:	<input type="radio"/> Based on string <input type="text"/> <input checked="" type="radio"/> Based on Customer Category <input type="radio"/> Based on value of HTML form entry "

In the **Set invoice number to the QuickBooks Purchase Order** field, select how the orders should be numbered when they are imported to QuickBooks. Check the box if you would prefer that your QuickBooks company to use its current numbering system when importing orders from PDG Commerce. In this case, the invoice number assigned by PDG Commerce will be imported to the “Memo” field when orders are imported to QuickBooks. Do not check this box if you would prefer that your QuickBooks company use the invoice number assigned by PDG Commerce as the number assigned to the order in QuickBooks.

If you would like for all orders imported to QuickBooks from PDG Commerce to be set as “to be printed” so they may be printed in a batch at a later time, check the **Set 'to be printed' for new orders** box.

In the **Set class for orders** field, you can specify to which class orders imported to QuickBooks from PDG Commerce should be assigned. The “Based on string” option allows you to enter the name of the class to which imported orders should be assigned. If you do not use classes in QuickBooks, you should select this option, and leave the field blank. The “Based on Customer Category” option will assign a class based on the customer category to which the purchasing customer is assigned in the “Customers” section of your Commerce Administrator. The “Based on value of HTML form entry” option is for advanced settings only. You should not select this option unless instructed to do so by PDG technical support.

**Note:** If you assign a class for orders, that class must exist in your QuickBooks company file. Entering a class that does not exist will cause the order import to fail.

## Advanced Product Settings

In this section of the page, you can enter advanced information specifying how product inventory should be imported from QuickBooks to PDG Commerce.

Advanced Product Settings	
Do not change image settings for existing products:	<input checked="" type="checkbox"/>
Do not change inventory settings for existing products:	<input checked="" type="checkbox"/>
Do not change weight setting for existing products:	<input type="checkbox"/>
Default product weight:	<input type="text"/>
Do not move products from their assigned category within PDG during synchronization:	<input checked="" type="checkbox"/>
Do not move products from the 'Inactive Product Category' during synchronization:	<input checked="" type="checkbox"/>
DO NOT update the Product's Description:	<input checked="" type="checkbox"/>
DO NOT import \$0.00 Products:	<input checked="" type="checkbox"/>
Use QuickBooks subitem hierarchy for product description: <small>*otherwise defaults to the first 255 characters of the description or sales description which is determined by item settings</small>	<input type="checkbox"/>
Use QuickBooks description for extended product text: <small>*this allows for the full description to be displayed on detailed item pages</small>	<input type="checkbox"/>
Subtract quantity on customer order from quantity on hand:	<input type="checkbox"/>
Add quantity on purchase order to quantity on hand:	<input type="checkbox"/>
Do not update Custom fields on existing products:	<input type="checkbox"/>
QuickBooks Custom field label: <input type="text"/>	mapped to PDG: <input type="text" value="Keywords"/>
QuickBooks Custom field label: <input type="text"/>	mapped to PDG: <input type="text" value="Keywords"/>
QuickBooks Custom field label: <input type="text"/>	mapped to PDG: <input type="text" value="Keywords"/>
QuickBooks Custom field label: <input type="text"/>	mapped to PDG: <input type="text" value="Keywords"/>
QuickBooks Custom field label: <input type="text"/>	mapped to PDG: <input type="text" value="Keywords"/>
Store QuickBooks Generated Number (listid) in User Defined:	<input type="text"/>

The **Do not change image settings for existing products** box allows you to determine whether or not Commerce products should have their image settings reset based on the current settings. If you have changed the image or thumbnail settings for any products after the last synchronization, and do not want them to be reset on the next synchronization, you should check this box.

The **Do not change inventory settings for existing products** box allows you to determine whether or not Commerce products should have their inventory options reset based on the current settings. If you have changed the backorder and out of stock options for any products after the last synchronization, and do not want them to be reset on the next synchronization, you should check this box.

**Note:** This field affects the out of stock settings for products. Updates of inventory totals are not affected by this setting.

The **Do not change weight setting for existing products** box allows you to determine whether or not Commerce products should have their weights reset based on the current settings. If you are setting a default weight (in the “Default product weight” field), or are assigning a custom field to the “Weight” field (in the “QuickBooks Custom field label” field), and have changed the weights for any products after the last synchronization, and do not want them to be reset on the next synchronization, you should check this box.

In the **Default product weight** field, you may specify a default weight to be entered for all products. If the majority of your products have a similar

weight, you can enter a value in this field to set it as the weight for all products as they are imported from QuickBooks to PDG Commerce.

Check the **Do not move products from their assigned category within PDG during synchronization** box if you have rearranged the products in your PDG Commerce Administrator since the last synchronization, and do not want the products reverted to their previous categories during synchronization. The categories are configured according to the "Product Category Specification" field.

**Note:** If you have moved any products into subcategories in PDG Commerce, you should check this box.

Check the **Do not move products in the 'Inactive Product Category' during synchronization** box if you have moved some products into the Inactive Product Category in PDG Commerce, and do not want the products reverted to their QuickBooks subitem assignments during synchronization.

The **DO NOT update the Product's Description** box allows you to specify that the "One-Line Description" field for your products should not be updated during synchronization. If you have modified the "One-line Description" field for your products since they were originally imported, you can check this box to ensure that they are not overwritten by the QuickBooks settings during synchronization.

The **DO NOT import \$0.00 Products** box allows you to specify whether products with a zero price should be imported as individual items. If you are using top level items as product categories in PDG Commerce, then any \$0.00 products will be assigned as categories. If you would also like for these \$0.00 top level items to be imported as individual products, you should uncheck this box.

Check the **Use QuickBooks subitem hierarchy for product description** box to include the top level item name in the "One-Line Description" field for the product. Consider the following example.

Name	Description	Type	Account	On Hand	Price
◊ A000	Gadgets and Widgets	Inventory...	Merchandise...	0	0.00
◊ A0001	Small gadget	Inventory...	Merchandise...	10	5.00
◊ A0002	Huge Widget	Inventory...	Merchandise...	5	25.00

In this example, A000 is the top level item, and A0001 is a subitem. If you check this box, the A0001 product in PDG Commerce will have a "One-Line Description" of "Gadgets and Widgets:Small gadget". If this box is not checked, the product's "One-Line Description" field will contain the first 255 characters of the "Description" or "Sales Description" field, based on your QuickBooks item settings. In this example, the "One-Line Description" for the product would be "Small gadget" if the box is not checked.

Check the **Use QuickBooks description for extended product text** if you want the sales description to be imported to the “Specific Product Text” field in PDG Commerce. Unlike the 255 character limit on the “One-Line Description” field, the “Specific Product Text” field can contain up to 4096 characters, so the full sales description can be imported to this field. If you do not check this box, the “Specific Product Text” field for each product will not contain any data from QuickBooks.

The **Subtract quantity on customer order from quantity on hand** box allows you to determine how the product inventory totals maintained in PDG Commerce will be calculated. If this box is not checked, the product inventory totals in PDG Commerce will be set according to the physical inventory in your QuickBooks company. However, it is possible that you have some items on customer order or sales order that have not yet been shipped. In that case, they are still included in the physical inventory total, even though they are no longer available for purchase. If you do not want the product inventory totals in PDG Commerce to include the items on customer order or sales order, check this box to subtract those items from the physical inventory.

The **Add quantity on purchase order to quantity on hand** box allows you to determine how the product inventory totals maintained in PDG Commerce will be calculated. If this box is not checked, the product inventory totals in PDG Commerce will be set according to the physical inventory in your QuickBooks company. However, it is possible that you have some items on purchase order that have not yet arrived. In that case, they are not included in the physical inventory total, even though they will soon be available for purchase. If you want the product inventory totals in PDG Commerce to include the items on purchase order, check this box to add those items to the physical inventory.

The **Do not update Custom fields on existing products** box allows you to specify if the custom fields should not be updated during synchronization. If you have modified any product fields in PDG Commerce that contain custom field data since they were originally imported, you can check this box to ensure that they are not overwritten by the QuickBooks settings during synchronization.

The **QuickBooks Custom field** label fields allow you to map additional fields from QuickBooks to PDG Commerce. You may import up to five additional fields. In the **QuickBooks Custom field label** field, enter the name of the custom field exactly as it is defined in QuickBooks, including the case. In the **mapped to PDG** field, select the field in PDG Commerce that should be used to contain the field you are importing.

**Note:** The additional fields must be configured as custom fields in QuickBooks. This feature is not available for additional fields in QuickBooks that are not custom fields.

The **Store QuickBooks Generated Number (listid) in User Defined** allows you to import the QuickBooks listid, which is an automatically generated 19-digit number, to a user defined field in PDG Commerce. If you would like to

import this number, enter the index number of the appropriate user defined field in this field.

### Advanced Customer Settings

In this section of the page, you can enter advanced information specifying how customer information should be imported from PDG Commerce to QuickBooks.

Advanced Customer Settings	
Do not import customers: All orders are imported as "Internet customer"	<input type="checkbox"/>
Save the customer's IP Number:	<input type="checkbox"/>
Add customers with the last name first (eg. 'Last, First'): The default setting is 'First Last'	<input type="checkbox"/>

You should check the **Do not import customers** box if you would like for all orders to be imported to your QuickBooks company with the customer name "Internet customer."

**Note:** It is not necessary to import all orders as the same customer to run reports of Internet sales in your QuickBooks company. The "Memo" field for each transaction in QuickBooks will contain the PDG Customer Category associated with the customer who placed the order. Additionally, in the "Set class for orders" field, you may specify a class to which all customer orders will be assigned.

Check the **Save the customer's IP Number** box if you would like for the IP number of the customer's computer to be imported to QuickBooks for each order. The IP number will be imported to the "Memo" field for each transaction in QuickBooks.

By default, customer names on orders are imported to QuickBooks in the format "First Last" (such as "John Smith"). If you would prefer that customer names are imported to QuickBooks in the format "Last, First" (such as "Smith, John"), check the **Add customers with the last name first (eg. 'Last, First')** box.

### Force Inventory Synchronization

In this section of the page, you can force a resynchronization of all products to ensure that inventory totals are updated in PDG Commerce. Every time the QuickBooks Web Connector program runs, the inventory totals in your QuickBooks file will be updated appropriately for all products that have been purchased through PDG Commerce. However, the inventory totals in PDG Commerce will only be updated from QuickBooks when all products are checked during synchronization.

Force Inventory Synchronization	
Force resynchronize each connection:	<input type="checkbox"/>
<a href="#">Submit Changes</a>	

Check the **Force resynchronize each connection** box to specify that the QuickBooks Web Connector should check all products for inventory changes on each synchronization.

**Note:** If you have a large number of items, it may be impractical for the QuickBooks Web Connector to check each product on every synchronization, due to the time required.

When you have finished making all changes to this page, and have submit the changes, click the "Download PDG Web Connector Configuration File(\*.qwc)" link. Once you have saved the file, make changes live from the Main Menu.





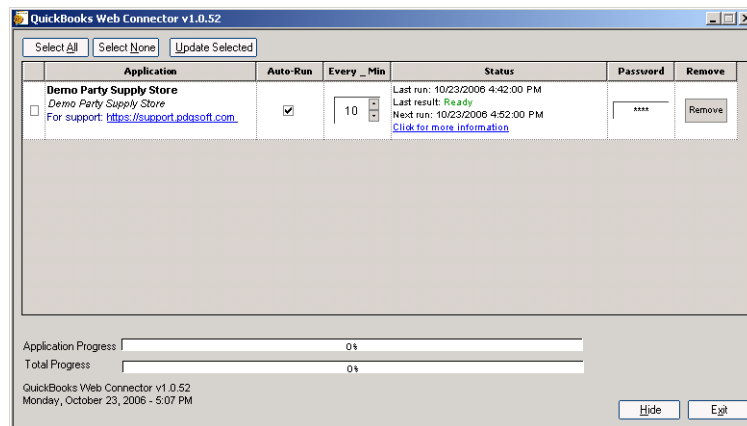
# Use QuickBooks Web Connector

*Use QuickBooks Web Connector to synchronize PDG Commerce Administrator with QuickBooks Financial.*

**T**his chapter explains how the QuickBooks Web Connector will synchronize your QuickBooks company with your PDG Commerce Administrator. You will be able to synchronize products and inventory totals between the two programs, as well as importing orders from your PDG Commerce Administrator to your QuickBooks company.

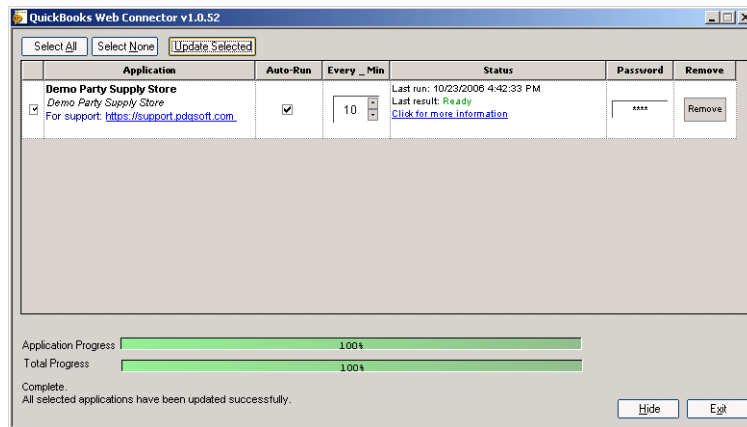
## Getting Started

After downloading the QuickBooks Web Connector program from your Commerce Administrator, install it on your local computer. After installation, open the Web Connector and grant access to QuickBooks when prompted. Close the Web Connector. Earlier you downloaded a QWC file from the PDG Commerce Administrator that you must install before your first synchronization. Once you have closed the QuickBooks Web Connector, double-click the QWC file to open it.



On the first screen, check the box next to the appropriate application name. The application name will be assigned according to the "Web Site Name" field in the "Company Information" section of your Commerce Administrator. If you would like to enable the Auto-Run feature, check the box in the "Auto-Run" field, and select a time interval in the "Every\_Min" field. Click the 'Update Selected' button to begin the synchronize import.

**Note:** Your computer must remain connected to the Internet in order to use the Auto-Run feature. If at any time the computer is disconnected from the Internet, the Auto-Run interval scheduled during that time will not occur. You should not enable the Auto-Run feature until after your first successful import of your products.



Once the "Total Progress" bar has reached 100 percent, the synchronization is now complete. If you would like to view a summary of the import, or if you received any errors, click the "Click for More Information" link.

**Note:** The progress bar may not indicate a true percentage amount, as the product and order portions of the synchronize are calculated separately. Orders are imported during the first 50% of the synchronization, while products are imported during the second 50% of the synchronization.

## Viewing Updates in PDG Commerce Administrator

Now that you have synchronized your products and orders, you may view the new settings in your Commerce Administrator. From the Main Menu, click the "Products" link. On the page that is displayed, click the 'Inventory' button. On the next page, click a product category link to view inventory by product.

Product Inventory			
Product Code	In Stock	Do Not Allow Backordering?	Do Not Display in Searches If Out Of Stock?
A0001	10.00	<input type="checkbox"/>	<input type="checkbox"/>
A0002	5.00	<input type="checkbox"/>	<input type="checkbox"/>

In this example, you will see product A0001, which now has the same inventory amount in the PDG Commerce Administrator as it does in the "On Hand" field in your QuickBooks company.

**Note:** All products in your QuickBooks company file will be imported to PDG Commerce. Any products that you see in the store that you do not wish to sell online should be moved to the Inactive (\*STG) category. These products will not be available for purchase through your web store. You should not delete these products from your PDG Commerce Administrator, as they will be imported again each time you synchronize the programs.

## Viewing Updates in your PDG Commerce Store Front

Next, you can walk through a test order in your PDG Commerce store front to see the products that have been added. To do that, access your PDG Commerce welcome page. This page is the commerce.html file on your web site. To access it, use a link similar to the following, replacing www.webstore-name.com with your web site address.

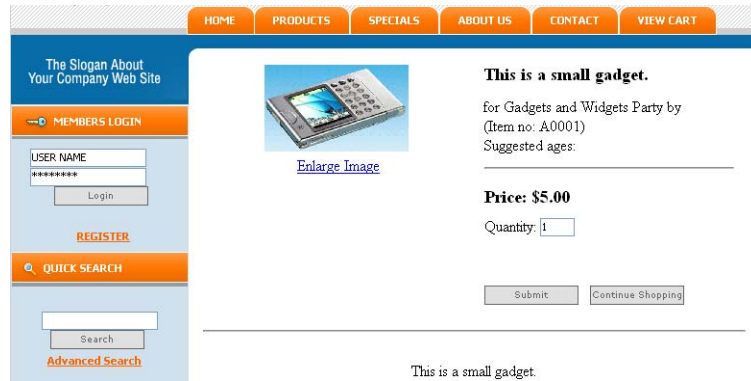
<http://www.webstorename.com/commerce.html>

In the blue box on the left side of the page, click the "Basic Functions" link. On the page that is displayed, click the 'Enter Store' button. You will be taken to the main product categories page of your store front.



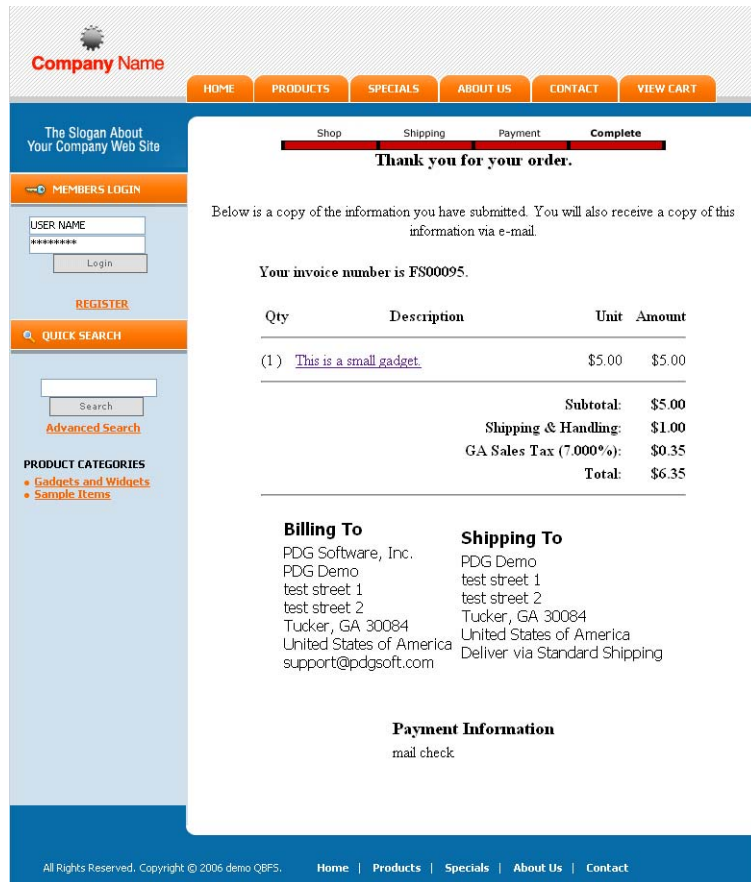
The categories displayed on this page have names based on your settings in the Commerce Administrator for the import. In this example, we selected "Use QuickBooks top level items as categories." Product A0001 is located in the "Gadgets and Widgets" category.

Clicking on a category name will take you to the product listing for that category. From that page, you can click the name or thumbnail of a product to continue to the product's item details page.



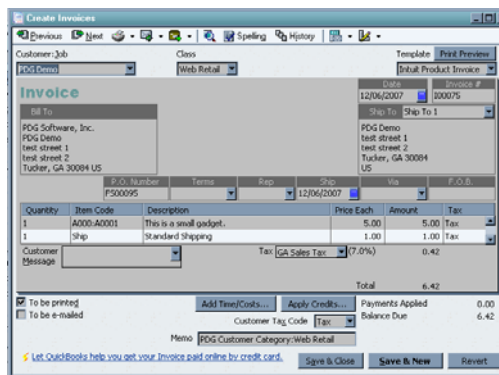
Product A0001 has a product name corresponding to the "Description" or "Sales Description" field in your QuickBooks company (based on your item settings), and a price corresponding to the "Price" field in your QuickBooks company.

Clicking the 'Submit' button will add the product to the basket. From there you may continue through the checkout process. On the receipt page, you will see the product's details displayed again.



## Viewing Orders in QuickBooks

After the next Web Connector synchronize, you may view the new orders in your QuickBooks company. Open the company file, and click the 'Invoices,' 'Sales Orders,' 'Sales Receipts,' or 'Estimates' button on the main page (according to your PDG Commerce settings). You will then see the new orders from your PDG Commerce program available in the window.



## Customer Importing

When an order is imported to QuickBooks from PDG Commerce, several criteria are checked to match the customer who placed the transaction on your web site to an existing customer in QuickBooks. If the customer can be matched successfully, then the order will be assigned to the customer that already existed in QuickBooks. If the customer cannot be matched successfully to an existing customer in QuickBooks, a new customer will be created for that order. If a customer exists in QuickBooks with the same name, but the customer associated with the transaction cannot be successfully matched to the existing customer, a new customer will be created. Since the customers have the same name, an asterisk will be added as the first character in the Customer Name field for customer created to match the new order.

## Matching Process

To determine if a customer match is successful, PDG Commerce will request several pieces of information from QuickBooks. First, PDG Commerce will request a list of customers in which the "Customer Name" field contains the last name entered in the transaction on the web site. QuickBooks returns a list of all customers matching these criteria. PDG Commerce then checks this list for an exact match of the first name entered in the transaction on the web site. Any customers in the returned list that do not contain the first name are removed from the returned list. The remaining customers on the list are checked for several matching fields. Using this criteria, a score is created for each existing customer account. Each customer account begins this process with a score of zero. For each field matched successfully, the score is increased by one point. PDG Commerce checks the following criteria to create the score:

- If a company was entered in the transaction on the web site, PDG Commerce will check if the "Customer Name" field in QuickBooks contains an exact match of this company name.
- If a company was entered in the transaction on the web site, PDG Commerce will check if the "Company Name" field in QuickBooks contains this company name. This check is not case-sensitive.
- The email address entered in the transaction on the web site is checked against the "E-mail" field in QuickBooks. This check is not case-sensitive.
- The phone number entered in the transaction on the web site is checked against the "Phone" field in QuickBooks. This check is not case-sensitive.

After all customer accounts have been checked, PDG Commerce will determine which account is the appropriate match based on the scores. If a single account has a higher score than all others, it is the appropriate match. If there is a tie for the highest score, the order will be assigned to the first account with that score that is encountered in the customer account list returned by the request PDG Commerce made to QuickBooks. If there are no remaining accounts on the list, PDG Commerce will create a new customer account in QuickBooks, adding an asterisk at the beginning of the "Customer Name" field for the new customer account.

## Considerations

When attempting to create customers, PDG will err on the side of caution. If there is a discrepancy over whether the customer account matches, a new customer account will be created to avoid incorrect matches.

If a new account was created, but the customer should have matched an existing account, the two customer accounts can be merged in QuickBooks. You should merge the new account (containing the asterisk) into the existing account.

When PDG Commerce checks the company name, it will use the "company" field from the order on the web site. That is an optional field that is not included by default. To add this field to your Checkout page, add the following HTML code to the template.

**Company:** `<input name="company" value="!---COMPANY_NAME---">`

**Note:** The company input from the web site will not be updated for existing customers in QuickBooks when new orders are placed. However, all new customers created in QuickBooks will include the company name from the web site if the customer entered it during the transaction.

## Reconciling Transactions

If you are using QuickBooks Merchant Services as your online payment gateway, and would like to reconcile your accounts in QuickBooks after importing

orders, you will need to enable certain settings in your PDG Commerce program.

**Note:** Reconciling online orders in QuickBooks with QuickBooks Merchant Services is available in QuickBooks versions 2007 and 2008. This option is not available in QuickBooks 2006.

You will need to select either "Sales Receipts" or "Based on Payment Type" in the "Import all orders as" field of the QBWC for QuickBooks Financial Settings in your Commerce Administrator. This field is explained further in the "Configure PDG Commerce Administrator" chapter of this guide.

You will also need to add a configuration setting to your PDG Commerce program. To do that, connect to your web site via FTP. Browse to the PDG\_Commerce folder (typically located in the cgi-bin directory). In this folder, find the shopper.conf file. Download it to your computer in ascii format. Before making any changes, save a backup copy of this file. Open the file in a text editor (such as Notepad). At the end of the file, add a new line and enter the following code.

**qbms\_reconcile=yes**

Save the file back to the PDG\_Commerce folder on your web site, making sure to upload it in ascii format. This configuration setting informs the PDG Commerce program that all appropriate transaction data for reconciling should be included for orders imported to QuickBooks as sales receipts.

## Troubleshooting

You can check the status of products and orders after a synchronization by clicking the "QuickBooks Web Connector Detail Log" link on the main QuickBooks page in your Commerce Administrator.

On this page, you will see a list of all products that have been created or updated in your PDG Commerce program during the synchronization. You will also see a list of the invoices and sales receipts created in your QuickBooks Point of Sale company during the synchronization. For each product and order, you will see the date and time that the last update was made.

```

2007-12-06T14:39:25    A000    skiped due to zero price
2007-12-06T14:39:25    A0001   created item
2007-12-06T14:39:25    A0002   created item
    
```

