

PDG Commerce – QuickBooks Financial Checklist

Before you begin setting up the integration between PDG Commerce and your QuickBooks company file, you should verify that your products and settings are correctly configured to ensure proper integration. This checklist includes settings you should verify, as well as additional information about optional data you may want to enter to QuickBooks prior to beginning the integration.

Configuration and Usage:

- Your web site must have an SSL certificate installed. A dedicated SSL certificate is preferred. Some shared certificates can be used, but may encounter connection errors when attempting to use the QuickBooks Web Connector.
- You should be using QuickBooks Pro, QuickBooks Premier, QuickBooks Premier Accountant, or QuickBooks Enterprise Edition. The version of your QuickBooks program must be 2006, 2007, 2008, or 2009.
- In the PDG Commerce Sales Tax settings, you will need to create tax rules. These tax rules must be set up identically to the sales tax items in your QuickBooks company file. Please note that if your QuickBooks company file does not have sales tax enabled, you can skip this step.
- In the QuickBooks section of your Commerce Administrator, you must enter the name of a sales tax item in the “Name for the 'no tax' (0% rate) Sales Tax” field. If you do not already have a sales tax item created in QuickBooks for a 0.00% tax, you will need to create one. Please note that if your QuickBooks company file does not have sales tax enabled, you can skip this step.
- In the QuickBooks section of your Commerce Administrator, you must enter the name of an “Item name for shipping charges.” If you already have a shipping item created in QuickBooks, you should copy its name to this field. If you do not have an item for shipping charges, you will need to create one in QuickBooks, and copy its name to this field.
- In the QuickBooks section of your Commerce Administrator, you must enter the name of an “Item name for discounting charges.” If you already have a discount item created in QuickBooks, you should copy its name to this field. If you do not have an item for discount charges, you will need to create one in QuickBooks, and copy its name to this field.
- To obtain the “QuickBooks Financial Company File” name and location, open your QuickBooks program and press the F2 key on your keyboard. In the window that appears, copy the entire file path included in the “location” field, and paste it into the “QuickBooks Financial Company File” field in the QuickBooks section of your Commerce Administrator.

- When configuring and using the QuickBooks Web Connector, you must be logged into your QuickBooks company file with an account that has been assigned administrator privileges.
- If you ever have to stop the QuickBooks Web Connector in an “ungraceful” manner (e.g., closing it with task manager or it closes on its own), you will most likely have a few system files left on the web server that cause the QuickBooks Web Connector to behave as if it is still running a synchronization. There is a ‘Reset Active Session’ button in the QuickBooks section of the Commerce Administrator that will remove these files. Note that you should only click this button if the QuickBooks Web Connector is **not** currently synchronizing.

Product Considerations:

- If you have named the product images for your products based on the Item Name field in QuickBooks, the name and location of these images can be imported to PDG Commerce. PDG Software provides a file synchronization tool that can be configured to upload your product images from your computer to the web site on an automated basis.
- If your product images do not have consistent file names, you can upload and assign each image individually in the Commerce Administrator after products have been imported.
- It is possible to assign a default product weight to all products for the initial import, or to enter the appropriate weight information for each product into a custom field in QuickBooks, and have it imported to the Weight field in PDG Commerce. Weight is used to calculate real-time shipping rates, such as UPS.
- You can import all five available custom fields from QuickBooks to fields in PDG Commerce. These fields can be used for searching, image display, weight, or additional text display.
- After product import, if you need to input additional data for a large number of items and you are familiar with working in a spreadsheet format, you can utilize PDG Commerce’s Data Import/Export functionality. You can export your product list to a CSV file from the Commerce Administrator and use a program (such as MS Excel) to edit the product data. You can then upload the modified CSV file to the PDG Commerce program and import the products.
- When importing products from QuickBooks to PDG Commerce, you have the option to import all products to one products category, import all products to the Inactive Products Category, create categories based on item type, or create categories based on top-level items.
- You can choose which items are imported to PDG Commerce from QuickBooks by selecting which item types to import. The available options are Service, Inventory

Item, Non-Inventory Item, Assembly, and Group. You may select any combination of these item types for import. Note that inactive items will not be imported.

- Please do not hesitate to contact PDG Software with any questions or if you encounter any difficulties during the integration process (https://support.pdgsoft.com/submit_request.htm).