
PDG Software

*QuickBooks Point
of Sale Guide*

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QuickBooks Point of Sale Guide

Synchronizing QuickBooks Point of Sale with PDG Commerce using QuickBooks Web Connector

This guide assumes that you have QuickBooks Point of Sale version 5, 6, or 7 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 Point of Sale, please contact Intuit technical support.

Introduction

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

Utilizing the QuickBooks Web Connector provided by Intuit, PDG Commerce merchants can communicate directly in near real-time with QuickBooks Point of Sale to exchange customers, products, inventory levels, and sales between their PDG Commerce enabled Web store and their brick-and-mortar retail store.

Merchants can set the Web Connector to connect directly with their store at any time interval they want. Once set, the service will automatically connect to their Web store, upload new products recently added to QuickBooks Point of Sale, update inventory levels for both retail and web sales, and then import all customer and sales information from the Web store into QuickBooks Point of Sale.

Overview

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

After the initial synchronization, all subsequent updates will follow the same process. First, all products added to QuickBooks Point of Sale since the last synchronization will be imported to PDG Commerce. Second, all products that were updated in QuickBooks Point of Sale since the last synchronization (that already exist in PDG Commerce) will be updated in PDG Commerce. Third, all orders placed through PDG Commerce since the last synchronization will be imported to QuickBooks Point of Sale. Finally, the inventory totals for products will be checked both in QuickBooks Point of Sale and PDG Commerce to ensure that they were properly updated to reflect all orders.

Getting Started

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

<http://www.pdgsoft.com/partners/qbpos.htm>

On the left side of this page, you will find a video that offers an overview of the integration between QuickBooks Point of Sale 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 Point of Sale 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 Point of Sale and PDG Commerce after watching the training video, please contact PDG technical staff.



Configure PDG Commerce Administrator

Configure PDG Commerce Administrator to synchronize with QuickBooks Point of Sale using QuickBooks Web Connector

This chapter explains how to properly configure your PDG Commerce Administrator to communicate with your QuickBooks Point of Sale software using the QuickBooks Web Connector tool.

Getting Started

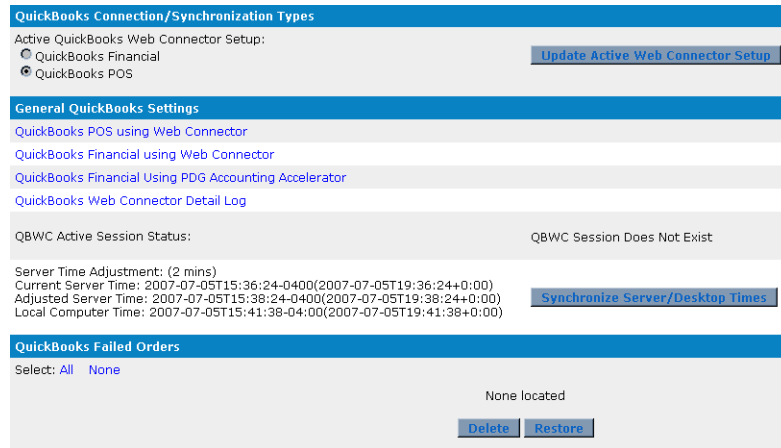
To access the QuickBooks Web Connector settings in your PDG Commerce Administrator, your Commerce program will need to be on patch 4.70.01.101 or higher. To upgrade, visit http://www.pdgsoft.com/Download/Comm_upgrade.html.

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 might look something like:

`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

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.

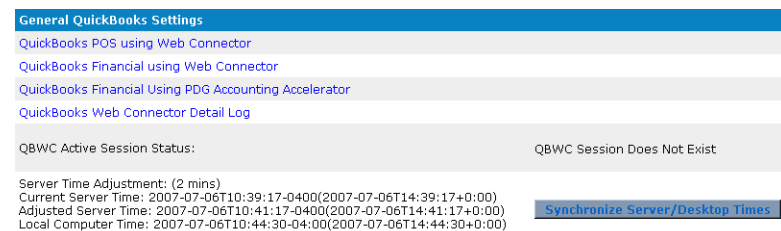
QuickBooks Connection/Synchronization Types

In this section, select the “QuickBooks POS” 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.



General QuickBooks Settings

To access the QuickBooks Web Connector settings for QuickBooks Point of Sale, click the “QuickBooks POS using Web Connector” link in the “General QuickBooks Settings” section of this page.



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 POS is your active QuickBooks Web Connector program.

The **QuickBooks POS using Web Connector** link will display the QuickBooks Point of Sale 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 Web Connector** link will display the QuickBooks Financial 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 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.

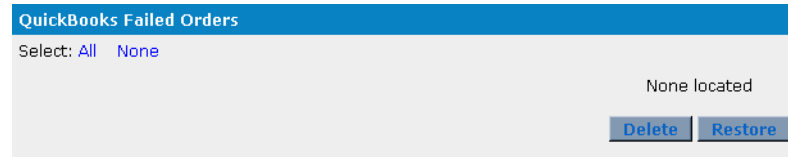
The **QBWC Active Session Status** field indicates whether or not an active session exists. If the QuickBooks Web Connector program was interrupted or failed for any reason, an active session may be left open. If you are not currently running the QuickBooks Web Connector program, but this field indicates 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 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 Point of Sale 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.

QuickBooks Failed Orders

In this section, you will see orders that failed to import to your QuickBooks Point of Sale, 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. 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>.

3. Connect to your web site via FTP, and browse to the PDG_Commerce directory. Find the PDG_QBWC folder, and delete it. Find the qbwc.lock and active.session files (if they exist), and delete them. Your Commerce Administrator's QuickBooks Web Connector Settings page should now show that a QBWC session does not exist. You are now ready to begin a new session.

QBWC For QuickBooks POS Settings

When you click the 'Update Active Web Connector Setup' button or the "QuickBooks POS using Web Connector" link on the main QuickBooks page in your Commerce Administrator, the "QBWC For QuickBooks POS 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 POS 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 Point of Sale software.

QBWC for QuickBooks POS Settings	
Download the QuickBooks Web Connector	
Download PDG Web Connector Configuration File(*.qwc)	
QuickBooks Web Connector User:	<input type="text" value="test_demo"/>
QuickBooks Web Connector Password:	<input type="text" value="test"/>
QBPOS Company:	<input type="text" value="New Party Store"/>
QBPOS Version:	<input type="text" value="6"/>
Import all orders as:	<input type="radio"/> Sales Orders <input checked="" type="radio"/> Sales Receipts <input type="radio"/> Based on Payment Type <small>(online methods import as receipts)</small>

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 Point of Sale computer.

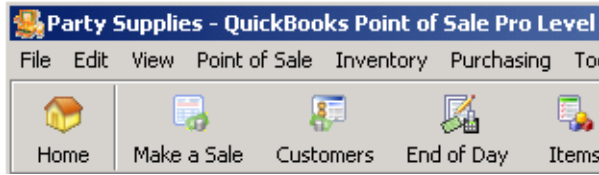
The **Download PDG Web Connector Configuration File(*.qwc)** link should be clicked after you have entered all settings on this page. Make sure that you click the ‘Submit Changes’ button, and the page is refreshed displaying your saved changes before you click this link, otherwise you will receive an incomplete file. When prompted to download the file (named pdg-pos.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 Point of Sale user accounts.

The **QBPOS Company** is the name of the your QuickBooks Point of Sale company file. Please note that this field is case specific, as the case entered in this field must exactly match the case of the file name. You can find the company file name in the title bar of your QuickBooks Point of Sale program, before the dash (-). In this example, the company name is Party Supplies.



The **QBPOS Version** is the version of the QuickBooks Point of Sale program that you are using. You should select either 5 or 6 in this field according to the version that you have installed. To view the version of your QuickBooks Point of Sale program, select “About Point of Sale” from the Help menu.

The **Import all orders as** selection allows you to set how orders will be imported into your QuickBooks Point of Sale company file. The "Sales Orders" option will import all orders as sales orders. The "Sales Receipts" option will import all orders as sales receipts. The "Based on Payment Type" option will import online credit card orders as sales receipts, and offline payment methods as sales orders.

QBWC Product Import Settings

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

QBWC Product Import Settings	
Default inventory settings for out of stock items/products:	display & do not allow backorder
Calculate inventory by subtracting quantity on customer/sales order from quantity on hand:	<input checked="" type="checkbox"/>
Calculate inventory by adding quantity on purchase order to quantity on hand:	<input type="checkbox"/>
Add newly imported products to the 'Inactive Product Category': <small>Products will not be available for purchase until moved to another category.</small>	<input type="checkbox"/>
Do not move products from their assigned department/category within PDG during synchronization:	<input checked="" type="checkbox"/>
Do not move products in the 'Inactive Product Category' during synchronization:	<input checked="" type="checkbox"/>
Add the following as searchable keywords:	<input checked="" type="checkbox"/> UPC <input checked="" type="checkbox"/> ALU <input checked="" type="checkbox"/> Description 2
Add QBPOS value to the product's user defined field: <small>*Enter a number 0-9 that corresponds to the appropriate user defined field or leave blank</small>	<input type="text"/> 0 UPC <input type="text"/> 1 ALU <input type="text"/> 2 Description 2
Non-Tax category label:	Exempt

In the **Default inventory settings for out of stock items/products** 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.

In the **Calculate inventory by subtracting quantity on customer/sales order from quantity on hand** field, you can 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 Point of Sale 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.

Note: This check box can only be checked if you are using QuickBooks Point of Sale version 6. This option is not available for version 5.

In the **Calculate inventory by adding quantity on purchase order to quantity on hand** field, you can 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 Point of Sale 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.

Check the **Add newly imported products to the 'Inactive Product Category'** box if you would like for all new products to be imported to the Inactive Product Category. 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 Point of Sale company file is completed.

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 in your QuickBooks Point of Sale company file on your web store, you should not check this box for the initial synchronization.

Check the **Do not move products from their assigned department/category within PDG during synchronization** box if you have rearranged the products in your PDG Commerce Administrator, and do not want the products reverted to their QuickBooks Point of Sale departments/categories during synchronization.

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 Point of Sale departments/categories during synchronization.

The **Add the following as searchable keywords** section allows you to import certain data fields from your QuickBooks Point of Sale company to the Keywords field for PDG Commerce products. The Keywords field for each product will be accessed during searches, allowing customers to search for individual products on your site based on the fields that you choose to import. You can choose to import the **UPC**, **ALU**, and/or **Description 2** fields to the Keywords field by checking the appropriate boxes.

The **Add QBPOS value to the product's user defined field** section allows you to import certain data fields from your QuickBooks Point of Sale company to the User Defined fields for PDG Commerce products. The User Defined fields for each product may be accessed during searches, allowing customers to search for products on your site based on the fields that you choose to import. The User Defined fields may also be searched individually, allowing customers to search using advanced options to locate specific products. Finally, the User Defined fields may be displayed individually on the Item, SearchResult, and Multiadd templates, as well as in the Basket. You can choose to import the **UPC**, **ALU**, and/or **Description 2** fields to the User Defined fields by entering the corresponding User Defined field's index number (0-9) in the appropriate fields.

In the **Non-Tax category label** field, you should enter "Exempt."

Note: You will need to configure sales tax rules in your Commerce Administrator for all applicable tax charges. These tax rules must match the tax items in your QuickBooks Point of Sale company. This requirement is explained in the "Configure QuickBooks Point of Sale" chapter of this guide.

QBWC Product 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.

Note: The current versions of QuickBooks Point of Sale 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 Product Image Settings	
Image file source: <small>This setting is for both thumbnail size and full size product images.</small>	<input type="text" value="use ALU"/>
Default setting for full size image file: Example: /images/ALU.jpg	Directory path for full size image: <input type="text" value="/images/"/> eg. '/images/' Extension for full size image: <input type="text" value=".jpg"/> eg. '.JPG'
Default setting for thumbnail size image file: Example: /images/thumb/ALU.jpg	Directory path for thumbnail image: <input type="text" value="/images/thumb/"/> eg. '/images/thumb/' Extension for thumbnail image: <input type="text" value=".jpg"/> eg. '.JPG'

In the Image file source field, select the field from the QuickBooks Point of Sale company file that should be used to name your full size and thumbnail images. You can choose “use Item Number,” “use UPC,” or “use ALU.” If you do not want to specify images at this time, select “I do not want to use images.”

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

In the **Default setting for full size image file** section, you should 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 **Extension for full size image** 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.

In the **Default setting for thumbnail size image file** section, you should enter the file path from the root directory of your web site to access the thumbnail images in the **Directory path for thumbnail 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 **Extension for thumbnail image** field, enter the file extension to be used for all of the thumbnail images. You will need to enter a period before the extension in this field, such as .jpg, .gif, or .png.

QBWC Product Style Settings

In this section of the page, you will enter the appropriate information to import products using QuickBooks Point of Sale styles into your PDG Commerce program. These settings will allow you to display products within the same style on a single page with a drop down menu for each product variation. Each style setting will be imported as a separate product, as they are defined in QuickBooks Point of Sale.

When products in a style group are imported to PDG Commerce, an additional product with an item number beginning with ST- will be created. This product will be used as the item number to display the style group on a single page with a drop down menu. Product attributes to be displayed for the file group should be assigned to the ST- product.

Note: You will need to add a PDG Commerce tag to your Item template in order to display the style menu. Please view the "PDG Commerce Style Tags" chapter of this manual for further information.

QBWC Product Style Settings	
<small>A QuickBooks POS style is a group of products in the same department with an identical description. The size and attribute are different for each product in the 'style'. The settings below will allow you to display products with the same style on a single page with a dropdown menu for each product variation.</small>	
Enable style display (based on QB POS styles) <small>*by default this will use user defined fields 6,7, and 8.</small>	<input type="checkbox"/>
Add the size/attribute to the product description	<input checked="" type="checkbox"/>
Display order for Attribute/Size:	<input type="radio"/> Attribute first <input checked="" type="radio"/> Size first

The **Enable style display (based on QB POS styles)** checkbox will enable importing of QuickBooks Point of Sale styles. If you have styles defined in QuickBooks Point of Sale for products you want to sell online, you should check this box.

Note: This setting uses three user defined fields. By default, these fields will be User Defined Data 6, User Defined Data 7, and User Defined Data 8. You should not use these fields to contain any other data.

The **Add the size/attribute to the product description** allows you to determine if the style selection will be displayed as part of the product name during the checkout process. If this box is not checked, only the product name will be displayed during checkout, without the style selection.

The **Display order for Attribute/Size** field allows you to select which selection should be listed first in the menu for products. If you are using both the Attribute and Size options in QuickBooks Point of Sale, both choices will be displayed in the same drop down menu. You may select which one should be displayed first (i.e., "T-Shirt Small White" or "T-Shirt White Small").

Advanced QuickBooks POS Settings

To access the Advanced QuickBooks POS Settings section 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 Point of Sale connection. Please contact PDG Software technical support if you require further assistance with these settings.

Advanced QuickBooks POS Settings	
QBPOS Computer:	<input type="text" value="localhost"/>
Use the same customer for all orders:	<input type="checkbox"/>
QBPOS Inventory Store: <small>*enter 1-10 to use quantity on hand from an individual store or leave blank to use a combined total from all stores.</small>	<input type="text"/>
Do not change inventory settings for existing products:	<input checked="" type="checkbox"/>
Do not change image settings for existing products:	<input checked="" type="checkbox"/>
DO NOT update the web store:	<input checked="" type="checkbox"/> Product's Description <input checked="" type="checkbox"/> Category's/Department's Description
Default product weight:	<input type="text"/>
POS Custom field label: <input type="text" value="Weight"/>	mapped to PDG: <input type="text" value="Weight"/>
POS Custom field label: <input type="text" value="Manf."/>	mapped to PDG: <input type="text" value="User Defined 3"/>
POS Custom field label: <input type="text" value="Age Range"/>	mapped to PDG: <input type="text" value="User Defined 4"/>
POS Custom field label: <input type="text" value="long 1"/>	mapped to PDG: <input type="text" value="User Defined 5"/>
POS Custom field label: <input type="text" value="long 2"/>	mapped to PDG: <input type="text" value="User Defined 9"/>
Do not update Custom fields on existing products:	<input type="checkbox"/>
Item template for styles:	<input type="text" value="PDGCommTemplates/store002/Se"/>
User defined field number (0-9) for QuickBooks POS Description: <small>The contents of this user defined field should not be modified. The field is the key that determines which products have the same style.</small>	<input type="text" value="7"/>
User defined field number (0-9) for QuickBooks POS Department Code: <small>The contents of this user defined field should not be modified. The field is the key that determines which products have the same style.</small>	<input type="text" value="8"/>
User defined field number (0-9) for QuickBooks POS Attribute/Size: <small>The contents of this user defined field can be modified. The contents of this field will be a choice in the dropdown menu.</small>	<input type="text" value="6"/>
QBPOS Log file:	<input type="text" value="qos.log"/>

The **QBPOS Computer** is the local computer on which you have QuickBooks Web Connector and QuickBooks Point of Sale installed. By default, this field is set to localhost. If you need to use a different computer name, you may enter it in this field. To determine the name of your computer, right-click the My Computer icon on your desktop, and choose Properties. Click the Network Identification tab. The name of your computer on the local network will be listed on this tab.

You should check the **Use the same customer for all orders** box if you would like for all orders to be imported to your QuickBooks Point of Sale company file with the customer name "PDG Web Order."

Note: It is not necessary to import all orders as the same customer to run reports of Internet sales in your QuickBooks Point of Sale company. The "Cashier" and "Associate" fields will always be set to “Internet Store” for orders placed through PDG Commerce, so you may use those fields to run reports of Internet sales.

In the **QBPOS Inventory Store** field, you will enter the store number of the physical location to which you are synchronizing your inventory. If you want to synchronize with a single store location, you should enter one number between 1 and 10 in this field to indicate which store number should be used, according to how it is entered in your QuickBooks Point of Sale company file. If you would like to synchronize your PDG Commerce product inventory totals with all of your physical stores, you should leave this field blank.

Note: This field may be left blank, or you may enter a single store number. You may not enter more than one store number in this field.

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. Inventory totals are always updated in every synchronization, regardless of this setting.

The **Do not change image settings for existing products** box allows you to determine whether or not image settings should be modified based on the current settings. If you have changed the full size or thumbnail image 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 update the web store** section allows you to specify if some fields should not be updated during synchronization. If you have modified the One-line Descriptions (names) of your products since they were originally imported, you can check the **Product's Description** box to ensure that they are not overwritten by the QuickBooks Point of Sale settings during synchronization. If you have modified the Descriptions (names) of your product categories since they were originally imported, you can check the **Category's/ Department's Description** box to ensure that they are not overwritten by the QuickBooks Point of Sale settings during synchronization.

Note: PDG Commerce allows up to 255 characters in the product description and category description fields, whereas QuickBooks Point of Sale allows only 30 characters. If you have extended the descriptions of your products and categories after the import, you should check these boxes.

The **Default product weight** field will allow you to set a default weight to be used for all products that are imported to PDG Commerce. You should enter a number in this field. It will be used as pounds or kilograms, depending on the setting configured in the "Site Units of Measure" field of the Commerce Options field.

The **POS Custom field label** fields allow you to map additional fields from QuickBooks Point of Sale to PDG Commerce. You may import up to five additional fields. In the **POS 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 Point of Sale. This feature is not available for additional fields in QuickBooks Point of Sale that are not custom fields.

The **Do not update Custom fields on existing products** field allows you to specify if the custom fields should not be updated during synchronization. If you have modified the User Defined Fields (containing custom field data) of your products since they were originally imported, you can check the box to ensure that they are not overwritten by the QuickBooks Point of Sale settings during synchronization.

The **Item template for styles** field allows you to specify a different field for use with QuickBooks Point of Sale style products. You may leave this field blank to use the same Item template displayed for non-style products.

Note: You will need to add a PDG Commerce tag to your Item template in order to display the style menu. Please view the "PDG Commerce Style Tags" chapter of this manual for further information.

The **User defined field number (0-9) for QuickBooks POS Description** field will determine which user defined field for each product will contain the key that determines which products have the same style. The contents of this user defined field should not be modified. If you have enabled QuickBooks Point of Sale styles, this field will be set to User Defined Data 6 by default.

The **User defined field number (0-9) for QuickBooks POS Department Code** field will determine which user defined field for each product will contain the key that determines which products have the same style. The contents of this user defined field should not be modified. If you have enabled QuickBooks Point of Sale styles, this field will be set to User Defined Data 7 by default.

The **User defined field number (0-9) for QuickBooks POS Attribute/Size** field will contain the text that will be displayed as a choice in the style drop down menu. The contents of this field may be modified. If you have enabled QuickBooks Point of Sale styles, this field will be set to User Defined Data 8 by default.

In the **QBPOS Log file** field, enter the name of the file to which you want QuickBooks Point of Sale 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.

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



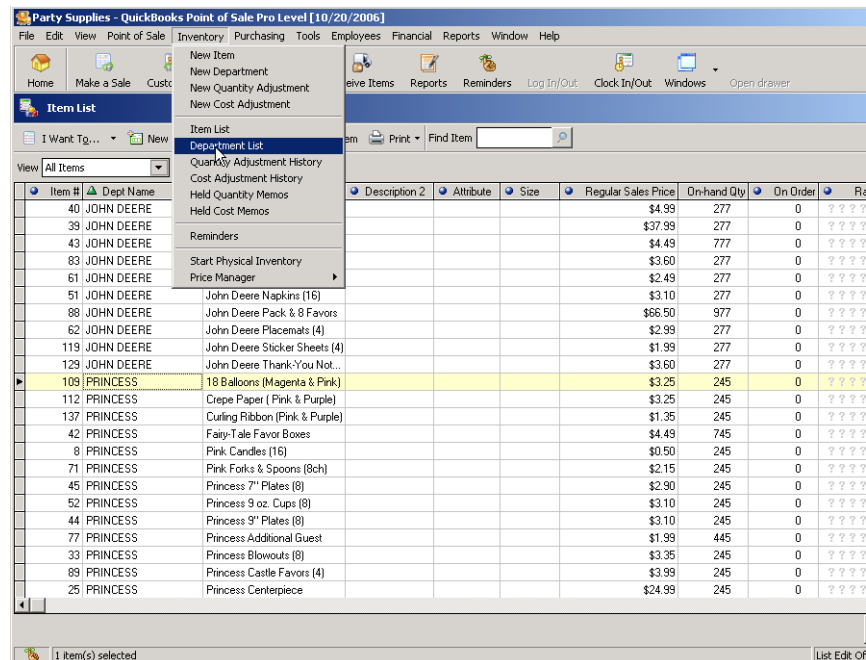
Configure QuickBooks Point of Sale

Configure QuickBooks Point of Sale to synchronize with PDG Commerce Administrator using QuickBooks Web Connector

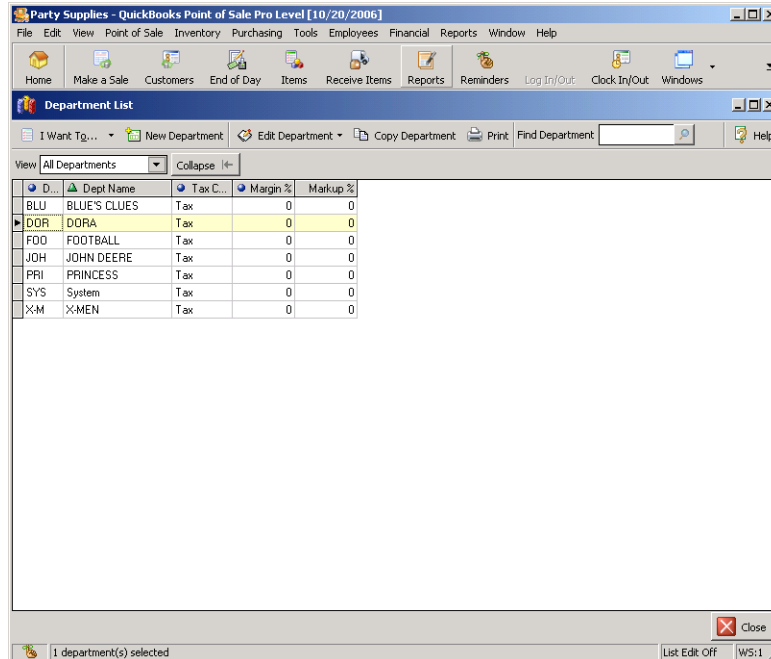
This chapter explains how to properly configure your QuickBooks Point of Sale software to communicate with your PDG Commerce Administrator using the QuickBooks Web Connector tool.

Configure Departments

Open the QuickBooks Point of Sale software on your local computer. From the “Inventory” menu, select the “Department List” option.



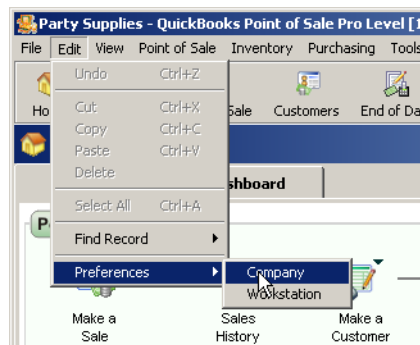
Once the Department List is displayed, you will need to verify that all departments have a three-character code. If any departments have a code of one or two characters, or if any two or more departments use the same code, products will be grouped incorrectly when imported into your PDG Commerce Administrator.



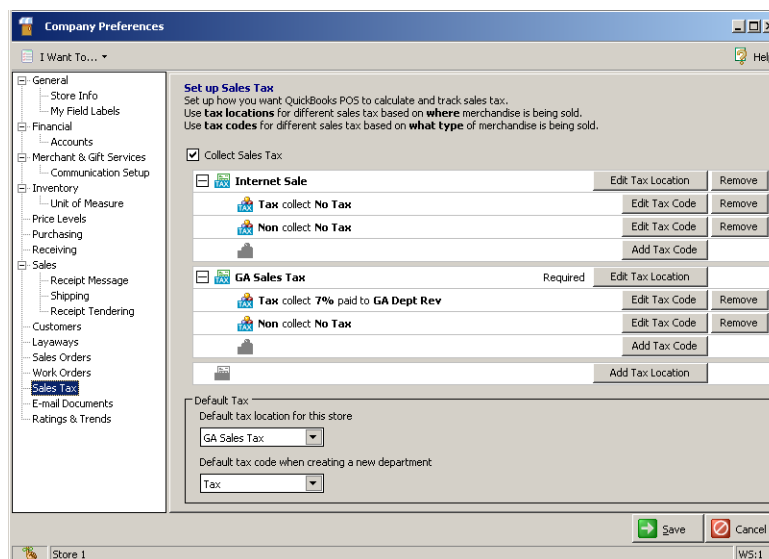
Configure Taxes

In order for the QuickBooks Web Connector to import orders from your PDG Commerce program to your QuickBooks Point of Sale company, you will need to have the appropriate tax rules set up. Any taxes that you collect online must be also exist in QuickBooks Point of Sale.

To set up taxes in QuickBooks Point of Sale, select Preferences from the Edit menu. Next choose Company.

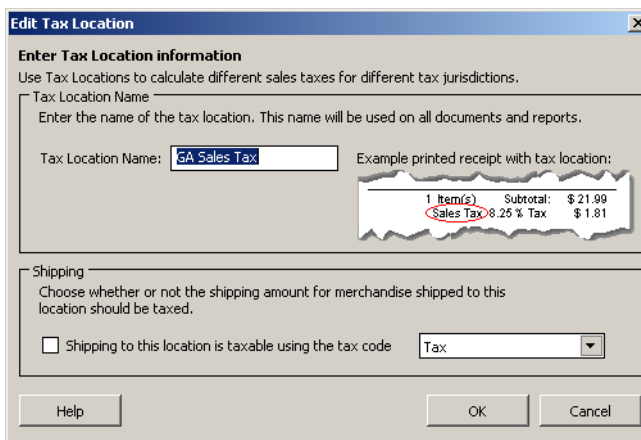


The Company Preferences window will then open. On the left side menu of this window, select Sales Tax.



In this window, you will need to configure tax locations for your web store. Record the names of your tax locations, ensuring that the case and spacing are correct. Also record whether or not shipping is taxable.

Note: You must enter the tax location names in your PDG Commerce Administrator for tax rules. You cannot use a tax code as the sales tax name for PDG Commerce.



Return to your PDG Commerce Administrator. Once you have logged in, go to the Sales Tax section from the Main Menu. Create any other required tax rules, ensuring that the case and spacing exactly match the tax location entered in QuickBooks Point of Sale. The tax percentage, as well as the Tax Shipping setting must also match. In this example, the tax would be named “GA Sales Tax”

PDG Commerce - Sales Tax Configuration

demo.pdgsoft.com
 Administrator Version 4.70.01 Patchlevel 48 E
 Database Version: 2.60

Status: These settings are live.

[Return to Main Menu](#)

Add A New Sales Tax Rule

Country:	<input type="text" value="United States of America"/>	Tax Percent:	<input type="text" value=""/>
State (US and Canada Tax Only):	<input type="text" value="Non-US / Non-Canada"/>	Sales Tax Label:	<input type="text" value=""/>
		Tax Shipping?	<input type="checkbox"/>

[Add Sales Tax Rule](#)

Current Sales Tax Rules

Country	State (US and Canada Only)	Tax Percent	Sales Tax Label	Tax Shipping?	
United States of America	Georgia (US)	7.000%	GA Sales Tax	No	Remove

After adding sales tax rules, make changes live from the Main Menu.

You can find further instructions for creating tax rules in the PDG Commerce User Guide, available for download at http://www.pdgsoft.com/docs/Comm_4_UserGuide.pdf.

Begin Synchronization

In the next section, we will walk through the synchronization process. We will use item 109 in the sample item list below as an example in the walk through. Note that the value in the “Item #” field will be used as the sku number in your PDG Commerce Administrator.

Item #	Dept Name	Description 1	Description 2	Attribute	Size	Regular Sales Price	On-Hand Qty	On Order	Rating	Tr
40	JOHN DEERE	John Deere Centerpiece				\$4.99	277	0	?????	--
39	JOHN DEERE	John Deere Deluxe Pack				\$37.99	277	0	?????	--
43	JOHN DEERE	John Deere Favor Boxes				\$4.49	777	0	?????	--
83	JOHN DEERE	John Deere Invitations (8)				\$3.60	277	0	?????	--
61	JOHN DEERE	John Deere Mylar Balloon				\$2.49	277	0	?????	--
51	JOHN DEERE	John Deere Napkins (16)				\$3.10	277	0	?????	--
88	JOHN DEERE	John Deere Pack & 8 Favors				\$66.50	977	0	?????	--
62	JOHN DEERE	John Deere Placemats (4)				\$2.99	277	0	?????	--
119	JOHN DEERE	John Deere Sticker Sheets (4)				\$1.99	277	0	?????	--
129	JOHN DEERE	John Deere Thank-You Not...				\$3.60	277	0	?????	--
109	PRINCESS	18 Balloons (Magenta & Pink)				\$3.25	245	0	?????	--
112	PRINCESS	Crepe Paper (Pink & Purple)				\$3.25	245	0	?????	--
137	PRINCESS	Curling Ribbon (Pink & Purple)				\$1.35	245	0	?????	--
42	PRINCESS	Fairy-Tale Favor Boxes				\$4.49	745	0	?????	--
8	PRINCESS	Pink Candles (16)				\$0.50	245	0	?????	--
71	PRINCESS	Pink Forks & Spoons (8ch)				\$2.15	245	0	?????	--
45	PRINCESS	Princess 7" Plates (8)				\$2.90	245	0	?????	--
52	PRINCESS	Princess 9 oz. Cups (8)				\$3.10	245	0	?????	--
44	PRINCESS	Princess 9" Plates (8)				\$3.10	245	0	?????	--
77	PRINCESS	Princess Additional Guest				\$1.99	445	0	?????	--
33	PRINCESS	Princess Blowouts (8)				\$3.35	245	0	?????	--
89	PRINCESS	Princess Castle Favors (4)				\$3.99	245	0	?????	--
25	PRINCESS	Princess Centerpiece				\$24.99	245	0	?????	--



Use QuickBooks Web Connector

Use QuickBooks Web Connector to synchronize PDG Commerce Administrator with QuickBooks Point of Sale

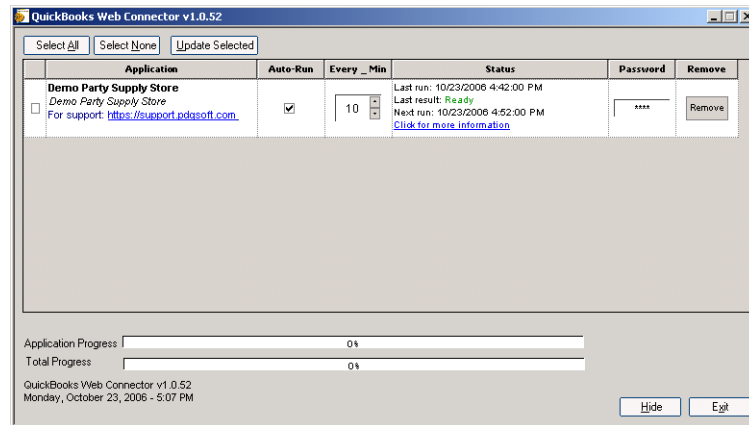
This chapter explains how the QuickBooks Web Connector will synchronize your QuickBooks Point of Sale company with your PDG Commerce Administrator. You will be able to synchronize products and inventory totals between the two programs, as well as importing orders from your PDG Commerce Administrator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

Getting Started

You will download a QWC file from the PDG Commerce Administrator that you must install before your first synchronization. Once you have saved the file to your computer, double-click it to open it.

Note: You may be prompted to log in when you open the QWC file the first time. If so, enter the username and password of an Administrator account for your QuickBooks Point of Sale company file.

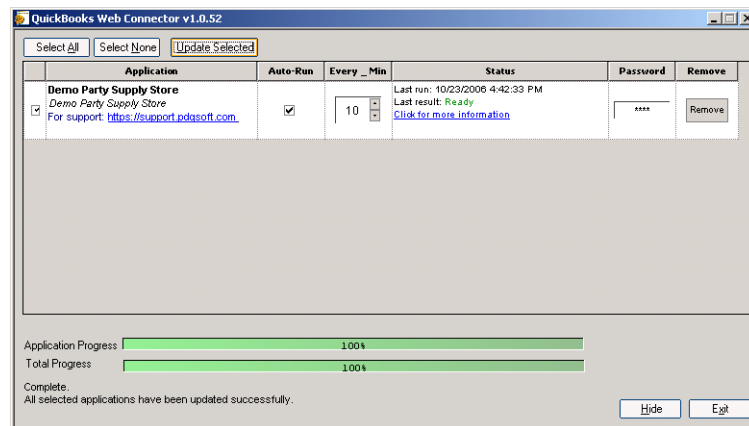
To begin the synchronization process, open the QuickBooks Web Connector program on your local computer.



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: You should not enable the Auto-Run feature until after your first successful import of your products.

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.



Once the “Total Progress” bar has reached 100 percent, click the ‘Exit’ button to close the QuickBooks Web Connector program. 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.

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?
107	245.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
109	245.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
112	245.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
121	945.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
132	145.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
135	245.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
25	245.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
33	245.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
34	245.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
42	745.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
44	245.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
45	245.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
52	245.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
66	245.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>

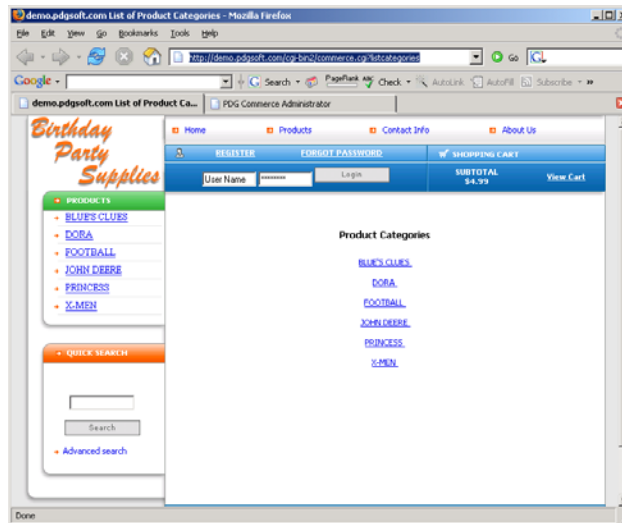
In this example, you will see product 109, which now has the same inventory amount in the PDG Commerce Administrator as it does in the “On-hand Qty” field in the QuickBooks Point of Sale company.

Note: All products in your QuickBooks Point of Sale 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, at <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 entered from the “Dept Name” field for each department in the QuickBooks Point of Sale program. Product 109 is located in the Princess 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 109 has a product name corresponding to the “Description 1” field in the QuickBooks Point of Sale company, and a price corresponding to the “Regular Sales Price” field in the QuickBooks Point of Sale 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.

Birthday Party Supplies

Home Products Contact Info About Us

REGISTER FORGOT PASSWORD SHOPPING CART

User Name [input] Login SUBTOTAL \$11.23 View Cart

Shop Shipping Payment Complete

Thank you for your order.

Below is a copy of the information you have submitted. You will also receive a copy of this information via e-mail.

Your invoice number is 100011.

Qty	Description	Unit	Amount
(1)	18 Balloons (Magenta & Pink)	\$3.25	\$3.25
(1)	Dora Starcatcher Centerpiece	\$4.99	\$4.99
(1)	4"x6" John Deere Favors (4)	\$2.99	\$2.99
Subtotal:		\$11.23	
Total:		\$11.23	

Billing To Shipping To

PDG Tester PDG Tester
 1234 My Billing Street 1234 My Shipping Street
 Tucker, GA 30084 Beverly Hills, CA 90210
 United States of America United States of America
 support@pdgsoft.com Deliver via USPS

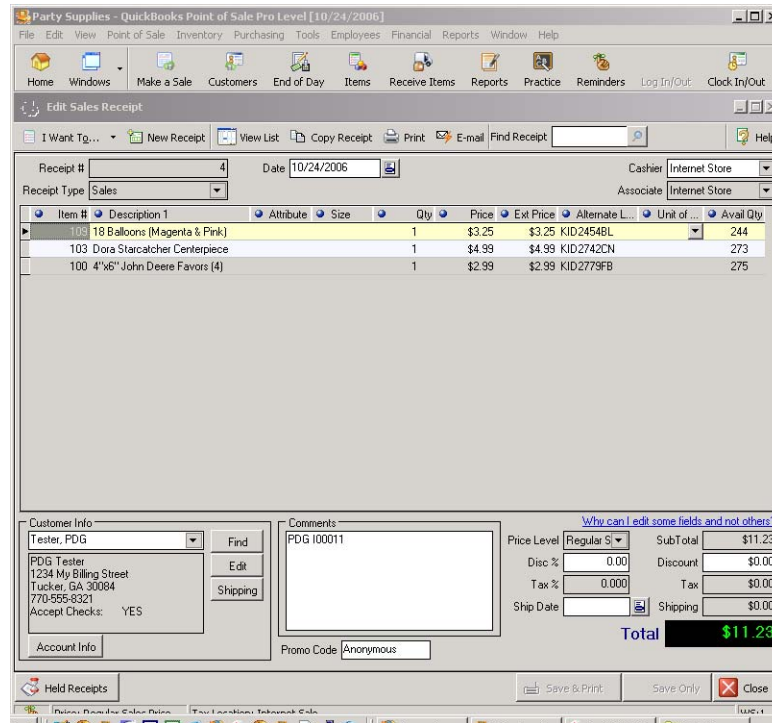
Payment Information
 Mail Check

Home Products Contact Info About Us

All Rights Reserved. Copyright © 2006 demo.pdgsoft.com.
 E-Commerce templates and shopping cart software provided by www.pdgsoft.com.

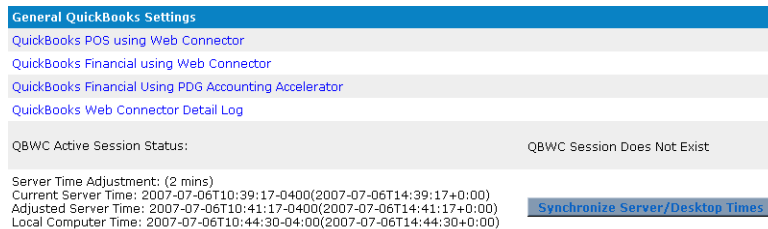
Viewing Orders in QuickBooks Point of Sale

After the next Web Connector synchronize, you may view the new orders in your QuickBooks Point of Sale company. Open the company file, and click the ‘Sales Receipts’ or ‘Sales Orders’ button on the main page. You will then see the new orders from your PDG Commerce program available in the list.



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.

2007-05-04T19:10:15	4276	item created
2007-05-04T19:10:15	4940	item created
2007-05-04T19:29:19	I00081	created receipt
2007-05-04T19:29:20	91	item updated
2007-05-04T19:29:20	1436	item updated



PDG Commerce Style Tags

Configuring PDG Commerce templates to display QuickBooks Point of Sale style options.

This chapter explains how to use PDG Commerce tags to control the display of the Item template that provides a drop down menu of the style choices. Please note that you may either use the default Item template for your PDG Commerce program to display the menu, or create a new Item template to be used for style products.

Template Tags

The following tags are available for use on the Style Item template:

`<!--QBPOS_STYLE_DROP_DOWN-->`

This tag will create a drop down menu containing the different style options for the product group. By default, this menu will contain the text entered in the User Defined Data 8 field. If you want to use a different field, you may specify that in the Advanced Settings section of the “QBWC For QuickBooks POS Settings” page in your Commerce Administrator. This tag must appear in the template as:

`<!--QBPOS_STYLE_DROP_DOWN-->`

‘STYLE’ Tags

When used in the Style Item HTML template, the STYLE tags will list the style products for the current style grouping. Each style choice exists as a separate product in your Commerce Administrator. If a style group contains nine products, the HTML code and PDG tags located inside the STYLE sec-

tion will be repeated nine times, once for each product. The STYLE tags will display all product style choices in the same fashion.

These tags must appear in the HTML template file as:

```
<select name=stylekey>
<option value="">Select Style/Size</option>
<!--BEGIN_STYLE-->
<option value="!---SKU---">[style display data]</option>
<!--END_STYLE-->
</select>
```

The tags that may be used between the STYLE tags in the Style Item HTML template (i.e., the style display data) are as follows:

<!--SKU--> Tag

This tag is replaced by the sku number of the style selection product. This tag must be used as the option value setting in the drop down menu, but may also be used as part of the style display data. The tag must appear in the template file as:

```
!---SKU---
or
<!--SKU-->
```

<!--DESC--> Tag

This tag is replaced by the name of the style selection product. The name of the product is saved in the “One-Line Description” field in the product details of your Commerce Administrator. The tag must appear in the template file as:

```
<!--DESC-->
```

<!--PRICE--> Tag

This tag is replaced by the price of the style selection product. The tag must appear in the template file as:

```
<!--PRICE-->
```

<!--TEXT--> Tag

This tag is replaced by the long description of the style selection product. The long description is saved in the “Specific Product Text” field in the product details of your Commerce Administrator. The tag must appear in the template file as:

```
<!--TEXT-->
```

<!--INV--> Tag

This tag is replaced by the inventory status of the style selection product. There are two ways to display inventory. In the Commerce Options section of your Commerce Administrator, there is a checkbox named “Display Inventory Amount.” If this box is checked, a number will be displayed, indicating the total number of items remaining in stock. If the box is not checked, an inventory status message will be displayed, such as “Available” or “Out of Stock.” The tag must appear in the template file as:

```
<!--INV-->
```

<!--WEIGHT--> Tag

This tag is replaced by the weight of the style selection product. This tag must appear in the template file as:

```
<!--WEIGHT-->
```

<!--USERDEF Tag

This tag is replaced by the corresponding User Defined Data field for the style selection product. This tag should include an index number to indicate which of the ten user defined fields should be used. The tag must appear in the template file as:

```
<!--USERDEF0-->,
<!--USERDEF1-->,
<!--USERDEF2-->,
etc.
```

Considerations

Any tags available for use on the Search Results template may be used within the STYLE tags. You can find a detailed explanation of each tag in the “HTML Template Files” chapter of the PDG Commerce Technical Reference Guide, available for download at http://www.pdgsoft.com/docs/Comm_4_TechRef.pdf.

Specifically for the select menu that will display the drop down menu of style choices, it is suggested that you use only the tags listed in this chapter. Other tags available for use within the STYLE tags may include HTML code for formatting, which would prevent proper operation of the drop down menu.

