

PDG Commerce – QuickBooks Point of Sale Checklist

- Your site must have an SSL certificate. It can be a shared or dedicated SSL.
- To access the QuickBooks POS configuration page you must login to your Commerce Administrator using the SSL server (https).
- You should be using Point of Sale version 5 or later.
- All products must be listed in a department. Point of Sale sets department as a required field when adding a product, however PDG has found many merchants have some products that have been entered without a department. (Hint: On the item listing page, you can sort by department by clicking on the column heading.)
- PDG uses the POS department codes to create our product categories. To insure that your products are displayed in the correct categories, you need to verify that each of your POS departments has a unique 3-character code.
- You need to have a sales tax zone in POS that is set to be tax exempt or 0%. The name of this tax zone is what you will enter in the 'Non-Tax category label:' field on the POS configuration page in PDG Commerce.
- In the PDG tax settings you will need to create tax rules that match your existing POS setting. These tax rules must be set up identically to import your web orders with your taxable zone. (Be sure to check if you have shipping & handling set as taxable.)
- To find the name of your POS company file, open POS and look at what is in the title bar of the window. This is what you need to enter in the "QBPOS Company:" field. The casing, spacing and punctuation should match. You should not include the '-QuickBooks Point of Sale...' text. If the company name does not match, you will get an error when running Web Connector.
- Depending on how your Point of Sale company is set up, you might be required to enter a user ID and password before Web Connector will run. When this is required, most merchants have to provide an administrator level user for Web Connector to run.
- If you ever have to stop the Web Connector in an 'ungraceful' manner (i.e. killing it with task manager or it crashing on it's own), you will most likely have 1 or 2 files left on your web server. They are active.session and qbwc.lock and will be in your PDG_Commerce directory. There is a button on the POS configuration page that will allow you to delete these files. You should always verify that Web Connector is NOT running on your local computer prior to deleting these files.
(PDG is working on a method of dealing with these situations with Web Connector where we will be able to tell when this has happened and delete the files without requiring the merchant's intervention.)
- If you have product images you want to display online and you name them with the POS item number as the base of the image (i.e. 123.jpg or 123.gif), PDG can automatically add this information to the product details.
(Upcoming version will include the ability to specify the image name based off item number, UPC, ALU, or one of the 5 custom fields in POS, plus the addition of a prefix or suffix that can be used to designate a thumbnail image.)

- ❑ Once the Web Connector has run, you can click on “Click for more information” under the Status column to get a summary about what was changed or added. It will tell you the totals of items that were added and updated, plus the number of orders that were imported into POS from your webstore.
- ❑ If you need to include additional data for a large number of items (long descriptions and weights being the most common) and you are familiar with working with a spreadsheet, PDG would suggest exporting your products as a CSV (comma separated values) file from the Commerce Administrator and using a program such as Microsoft Excel to edit the product data. You can then upload the modified CSV file and update the products.
- ❑ If you are selling only a small percentage of your products online, you might find it easier to import all of your products into the PDG ‘inactive’ category and then move the items you are selling into the appropriate categories.
- ❑ Please do not hesitate to contact us if you have any additional questions or have any difficulties during the process. https://support.pdgsoft.com/submit_request.htm