Sales

Overview   All sales   Pledges   Estimates   Payment links   **Customers**   Deposits   Products and services

< Customers   +   ⇥

Filter by name or details

Sort by name ▲

New

Overview

Books review

Dashboard

Banking

Sales

Cash flow

Expenditures

Payroll

Reports

Taxes

Mileage

Accounting

My accountant

Commerce

Insurance

Tools

- 1922/23

abc street,

Add notes

Edit ⌄   **New transaction** ⌄

$250.00
OPEN

$0.00
OVERDUE

Transaction List   Customer Details   Late Fees

Batch actions ⌄   **Filter** ⌄

< First   Previous   1-1 of 1   Next   Last >

	DATE	TYPE	NO.	MEMO	DUE DATE	BALANCE	TOTAL	STATUS ▲	ACTION
☐	12/16/2022	Pledge	woo-...		01/15/2023	$250.00	$250.00	Open	Receive payment ⌄
		Total				$250.00	$250.00		

↑ Paid   ↑ Print

I want it like this.

< First   Previous   1-1 of 1   Next   Last >

Dashboard
Posts
Media
Pages
Comments
WooCommerce
Home
Orders
QuickBooks Feeds
Customers
Coupons
Reports
Settings
Status
QuickBooks Log
Extensions
Products
Analytics
Marketing
WPForms
Appearance
Plugins
Users
Tools
Settings

Edit QuickBooks Feed   New QuickBooks Feed

You've been using WooCommerce QuickBooks Plugin for some time now; we hope you love it.
If you do, please leave us a ★★★★★ rating on WordPress.org to help us spread the word and boost our motivation.

Yes, you deserve it | Dismiss this notice

customer feed

QuickBooks Fields Mapping

1. Select QuickBooks Account

Select QuickBooks Account. ⓘ   JSGA_Sandbox

2. Select QuickBooks Object

Select QuickBooks Object. ⓘ   Customer

🔄 Refresh Objects   🔄 Refresh Fields

3. Map Form Fields to QuickBooks Fields.

Email Address (Required)

Name: PrimaryEmailAddr_Address , Type: Email

| Field Type | Standard Field |
| Select Field | Billing billing_email |

Shipping City

Name: ShipAddr_City , Type: Text

| Field Type | Standard Field |
| Select Field | Shipping Town / City |

Shipping Line1

Name: ShipAddr_Line1 , Type: Text

| Field Type | Custom Value |
| Custom Value | {_shipping_address_1} {_shipping_address_2} {_billing_address_2} |

You can add a form field {field_id} in custom value from following form fields
Billing Apartment, suite, unit, etc. (optional)

Shipping State

Name: ShipAddr_CountrySubDivisionCode , Type: Text

| Field Type | Standard Field |
| Select Field | Shipping State / County |

Shipping Postal Code

Name: ShipAddr_PostalCode , Type: Text

| Field Type | Standard Field |
| Select Field | Shipping Postcode / ZIP |

Shipping Country

Name: ShipAddr_Country , Type: Text

| Field Type | Standard Field |
| Select Field | Shipping Country / Region |

Billing City

Name: BillAddr_City , Type: Text

| Field Type | Standard Field |
| Select Field | Billing billing_city |

Billing Line1

Name: BillAddr_Line1 , Type: Text

| Field Type | Custom Value |
| Custom Value | {_billing_address_1} {_billing_address_2} |

You can add a form field {field_id} in custom value from following form fields
Billing Apartment, suite, unit, etc. (optional)

Billing State

Name: BillAddr_CountrySubDivisionCode , Type: Text

| Field Type | Standard Field |
| Select Field | Billing billing_state |

Billing Postal Code

Name: BillAddr_PostalCode , Type: Text

| Field Type | Standard Field |
| Select Field | Billing billing_postcode |

Billing Country

Name: BillAddr_Country , Type: Text

| Field Type | Standard Field |
| Select Field | Billing billing_country |

Last Name

Name: FamilyName , Type: Text

| Field Type | Standard Field |
| Select Field | Billing billing_last_name |

First Name

Name: GivenName , Type: Text

| Field Type | Standard Field |
| Select Field | Billing billing_first_name |

Company Name

Name: CompanyName , Type: Text

| Field Type | Standard Field |
| Select Field | Billing billing_company |

Display Name

Name: DisplayName , Type: Text

| Field Type | Standard Field |
| Select Field | display_name |

Mobile Number

Name: Mobile_FreeFormNumber , Type: Phone

| Field Type | Standard Field |
| Select Field | Billing billing_phone |

Add New Field

Select Field   ⊕ Add Field

4. When to Send the Order to QuickBooks.

Select Event ⓘ   When user submits the order

Custom Filter ⓘ   ☐ Enable

5. Choose Primary Key.

Select Primary Key   Email Address

If you want to update a pre-existing object, select what should be used as a unique identifier ("Primary Key"). For example, this may be an email address, lead ID, or address. When a new order comes in with the same "Primary Key" you select, a new object will not be created, instead the pre-existing object will be updated.

Update Entry   ☑ Do not update entry, if already exists

Repeat Feed   ☐ Repeat this feed for each line item of an Order

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Premium Version

✔ Create SalesReceipt, Estimate, Credit Memo, Payment in QuickBooks.
✔ QuickBooks Phone Number fields and Custom fields.
✔ Advanced Tax mapping from WooCommerce to Quickbooks.
✔ Set Custom Line Item Description from WooCommerce to Quickbooks.
✔ Send Invoice, SalesReceipt, Estimate, Credit Memo, Payment to customer email address.
✔ Synchronize Products and Quantity on hand from Quickbooks to WooCommerce.
✔ Send Shipping and Discount info from WooCommerce to QuickBooks.
✔ Create Refund Receipt in QuickBooks when Order is refunded in WooCommerce.
✔ Send WooCommerce Orders in bulk to QuickBooks.

By purchasing the premium version of the plugin you will get access to advanced marketing features and you will get one year of free updates & support

Go Premium

Publish

Status: Published Edit

Visibility: Public Edit

Published on: Nov 14, 2022 at 06:03 Edit

Move to Trash   Update

Edit QuickBooks Feed New QuickBooks Feed

Screen Options ▲

You've been using WooCommerce QuickBooks Plugin for some time now; we hope you love it!.
If you do, please leave us a ★★★★★ rating on WordPress.org to help us spread the word and boost our motivation.

Yes, you deserve it | Dismiss this notice

invoice feed

QuickBooks Fields Mapping

1. Select QuickBooks Account —

Select QuickBooks Account. ⓘ   ...dbox

2. Select QuickBooks Object —

Select QuickBooks Object. ⓘ   Invoice

⟳ Refresh Objects   ⟳ Refresh Fields

3. Map Form Fields to QuickBooks Fields. —

Billing Email 🗑 —

Name: BillEmail_Address , Type: Text
Field Type   Standard Field
Select Field   Billing billing_email

Date 🗑 —

Name: TxnDate , Type: Date
Field Type   Standard Field
Select Field   Order Date

Doc Number 🗑 —

Name: DocNumber , Type: Text
Field Type   Custom Value
Custom Value   woo-{_order_id}

You can add a form field {field_id} in custom value from following form fields
Order ID

Shipping City 🗑 —

Name: ShipAddr_City , Type: Text
Field Type   Standard Field
Select Field   Shipping Town / City

Shipping Line1 🗑 —

Name: ShipAddr_Line1 , Type: Text
Field Type   Custom Value
Custom Value   {_shipping_address_1} {_shipping_address_2}

You can add a form field {field_id} in custom value from following form fields
Shipping Apartment, suite, unit, etc. (optional)

Shipping State 🗑 —

Name: ShipAddr_CountrySubDivisionCode , Type: Text
Field Type   Standard Field
Select Field   Shipping State / County

Shipping Postal Code 🗑 —

Name: ShipAddr_PostalCode , Type: Text
Field Type   Standard Field
Select Field   Shipping Postcode / ZIP

Shipping Country 🗑 —

Name: ShipAddr_Country , Type: Text
Field Type   Standard Field
Select Field   Shipping Country / Region

Billing City 🗑 —

Name: BillAddr_City , Type: Text
Field Type   Standard Field
Select Field   Billing billing_city

Billing Line1 🗑 —

Name: BillAddr_Line1 , Type: Text
Field Type   Custom Value
Custom Value   {_billing_address_1} {_billing_address_2}

You can add a form field {field_id} in custom value from following form fields
Billing Apartment, suite, unit, etc. (optional)

Billing State 🗑 —

Name: BillAddr_CountrySubDivisionCode , Type: Text
Field Type   Standard Field
Select Field   Billing billing_state

Billing Postal Code 🗑 —

Name: BillAddr_PostalCode , Type: Text
Field Type   Standard Field
Select Field   Billing billing_postcode

Billing Country 🗑 —

Name: BillAddr_Country , Type: Text
Field Type   Standard Field
Select Field   Billing billing_country

Add New Field

Select Field   ⊕ Add Field

4. When to Send the Order to QuickBooks. —

Select Event ⓘ   When user submits the order

Custom Filter ⓘ   ☐ Enable

5. Choose Primary Key. —

Select Primary Key   Doc Number

If you want to update a pre-existing object, select what should be used as a unique identifier ("Primary Key"). For example, this may be an email address, lead ID, or address. When a new order comes in with the same "Primary Key" you select, a new object will not be created, instead the pre-existing object will be updated.

Update Entry   ☐ Do not update entry, if already exists
Repeat Feed   ☐ Repeat this feed for each line item of an Order

6. Assign Customer (Required) —

Assign Customer   ☑ Enable
Select Customer Feed   customer feed

Create a feed for Customer object then select that feed here

7. Create Order Products —

Line Items ⓘ   ☑ Create an order product for each line item
Item Accounts   ⟳ Refresh Data
Income Account   Sales of Product Income
Deposit Account   Checking
Asset Account   Inventory Asset
                        (Optional) Required for creating new Inventory Products
Expense Account   Cost of Goods Sold
                        (Optional) Required for creating new Inventory Products
Line Items Tax Code   TAX
                        (Optional) Required if tax code is enabled
Transaction Tax Code   TAX
Class   Select Class
                        (Optional)
Item Type   Non Inventory
Match Items By   SKU

Premium Version

✓ Create SalesReceipt, Estimate, Credit Memo, Payment in QuickBooks.
✓ QuickBooks Phone Number fields and Custom fields.
✓ Advanced Tax mapping from WooCommerce to QuickBooks.
✓ Set Custom Line Item Description from WooCommerce to QuickBooks.
✓ Send Invoice, SalesReceipt, Estimate, Credit Memo, Payment to customer email address.
✓ Synchronize Products and Quantity on hand from Quickbooks to WooCommerce.
✓ Send Shipping and Discount info from WooCommerce to QuickBooks.
✓ Create Refund Receipt in QuickBooks when Order is refunded in WooCommerce.
✓ Send WooCommerce Orders in bulk to QuickBooks.

By purchasing the premium version of the plugin you will get access to advanced marketing features and you will get one year of free updates & support

Go Prem

Publish

▲ ▼

Status: Published Edit
Visibility: Public Edit
Published on: Nov 14, 2022 at 06:03
Edit

Move to Trash   Update