



Miva Synchro v1.6
User Guide
Revision 1.0

Table of Contents

Table of Contents	2
What is Miva Synchro	3
Capabilities	3
How it Works	3
The Miva Synchro Connector Module	4
Module Installation/Upgrading	4
Licensing	4
Miva Synchro Licenses	4
Registering Miva Synchro	4
Using the Add Store Wizard	5
Starting the Add Store Wizard	5
Step-by-Step	6
How the Wizard Configures Miva Synchro	11
Order Synchronization	11
Product Synchronization	12
Customer Synchronization	12
Basic Functionality	12
Starting/Stopping	12
Manual Synchronization	12
Store Properties	14
Miscellaneous Store Settings	15
QuickBooks	16
Miva Merchant	16
Automatic Synchronization	16
Fields	17
Overview	17
Logic Controls	20
Custom Fields	20
Downloading Orders	21
Overview	21
Basic Settings	22
Invoices vs Sales Receipts	22
Terms (Invoices)/Payment Method (Sales Receipts)	23
Shipping	23
Line Items	23
Sales Tax	24
Synchronization	25
Overview	25
Explanation of Common Settings	25
Synchronize Products/Customers Created In...	25
Conflict Resolution	25
Sync Direction	26
Full Scan	26
Recreate Previously Deleted	26

Product Synchronization	26
Overview	26
Inventory vs. Non-Inventory	27
Group Items and Inventory Assemblies	28
Tracking Cost for Non-Inventory Items	28
Selective Synchronization	28
Price/Availability Groups	29
Accounts	29
Tax Codes	29
Customer Synchronization	30
Overview	30
Limitations	31
Price/Availability Groups	31
Mailing Lists/Integration with Miva Mailer	32
Configuring QuickBooks Company File Access	32
SynchroHelper	34
Synchronize	34
Download Orders	35
Retrieve Payment Information	35
General Settings	37

What is Miva Synchro

Miva Synchro is a tool for synchronizing data between Miva Merchant and 3rd party applications. At this time, the only 3rd party application supported is QuickBooks. QuickBooks 2003 or newer is required for Miva Synchro.

Capabilities

Miva Synchro is capable of automatically downloading Miva Merchant orders and entering them in QuickBooks, as well as synchronizing changes to product and customer information made in either application.

Miva Synchro can synchronize multiple Miva Merchant storefronts and/or multiple QuickBooks files. It is even possible, if desired, to synchronize multiple Miva Merchant storefronts with a single QuickBooks file.

Miva Synchro provides significant configurability, which allows it to enter data in QuickBooks the way you want it to. Instead of changing your accounting methods to adapt to Miva Synchro, it changes to adapt to your accounting methods.

How it Works

Miva Synchro communicates with your Miva Merchant storefront over the internet, using SSL (if available) for data security. The software can be configured to automatically check for new orders/changes periodically, or synchronization can be manually initiated.

The Miva Synchro Connector Module

The Miva Synchro Connector module, `synchro.mv[c]`, facilitates the communications between your Miva Merchant storefront and Miva Synchro. The connector module must be installed in each Miva Merchant domain, and active in each Miva Merchant storefront that you wish to communicate with Miva Synchro.

Module Installation/Upgrading

If you configure synchronization using the Add Store wizard, Miva Synchro will automatically install or upgrade the connector module for you.

To manually install the module, your Miva Merchant administration must be in Advanced Mode.

1. Expand “Modules” in the left navigation bar and select “Add Module”
2. Click on the “Upload File” button
3. Enter the path to the Miva Synchro module on your local system, or use the “Browse” button to locate the file. If you are using Miva Merchant v4.13 or earlier, the name of the module is `synchro.mv`. If you are using Miva Merchant v4.14 or later, the name of the module is `synchro.mvc`.
4. Click the “Upload” button
5. Click the “Add” button
6. Expand “Stores” and expand the store you wish to synchronize with Miva Synchro.
7. Click on “Utilities”
8. Check the checkbox next to “Miva Synchro Connector”
9. Press the “Update” button

Licensing

Miva Synchro Licenses

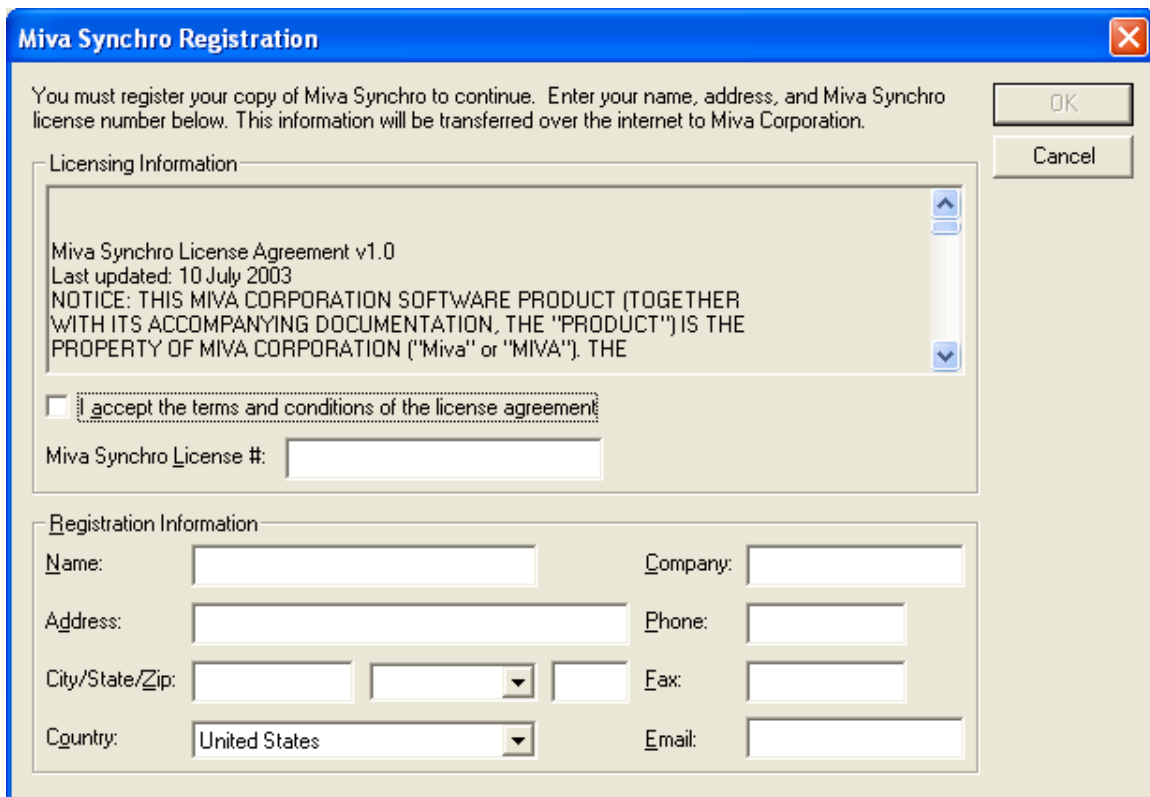
Miva Synchro requires *license numbers* to operate. There are two types of Miva Synchro license numbers. The first, a **Miva Synchro License**, allows you to install Miva Synchro on a single computer and synchronize with a single Miva Merchant Storefront. The second, a **Miva Synchro Additional Storefront License**, allows you to synchronize a single additional storefront (per license number).

Miva Synchro licenses are available from the Miva General Store.

Miva Synchro licenses are tied to the PC used to originally register Miva Synchro. If you need to move your Miva Synchro installation to a different PC, please contact Miva Technical Support.

Registering Miva Synchro

The first time you start Miva Synchro, the “Miva Synchro Registration” dialog box will appear.

The image shows a 'Miva Synchro Registration' dialog box with a blue title bar and a close button. The main text area contains instructions: 'You must register your copy of Miva Synchro to continue. Enter your name, address, and Miva Synchro license number below. This information will be transferred over the internet to Miva Corporation.' Below this is a 'Licensing Information' section with a scrollable text area containing the 'Miva Synchro License Agreement v1.0' and a notice about the software product. A checkbox labeled 'I accept the terms and conditions of the license agreement' is present. Below the checkbox is a text field for 'Miva Synchro License #'. The bottom section is 'Registration Information', which includes fields for Name, Company, Address, Phone, City/State/Zip, Fax, Country (a dropdown menu currently showing 'United States'), and Email. 'OK' and 'Cancel' buttons are located in the top right corner.

Miva Synchro Registration

You must register your copy of Miva Synchro to continue. Enter your name, address, and Miva Synchro license number below. This information will be transferred over the internet to Miva Corporation.

Licensing Information

Miva Synchro License Agreement v1.0
Last updated: 10 July 2003
NOTICE: THIS MIVA CORPORATION SOFTWARE PRODUCT (TOGETHER WITH ITS ACCOMPANYING DOCUMENTATION, THE "PRODUCT") IS THE PROPERTY OF MIVA CORPORATION ("Miva" or "MIVA"). THE

☐ I accept the terms and conditions of the license agreement

Miva Synchro License #:

Registration Information

Name: Company:

Address: Phone:

City/State/Zip: Fax:

Country: Email:

OK Cancel

You must enter your contact information and a valid Miva Synchro license number to continue. When you press the “OK” button Miva Synchro will communicate with the Miva License Management system over the internet to confirm your license number.

Using the Add Store Wizard

Starting the Add Store Wizard

The Add Store Wizard makes configuring Miva Synchro fast and easy. The Add Store Wizard will configure Miva Synchro with reasonable default settings for all options, and will automatically install the Miva Synchro Connector module into your Miva Merchant storefront.

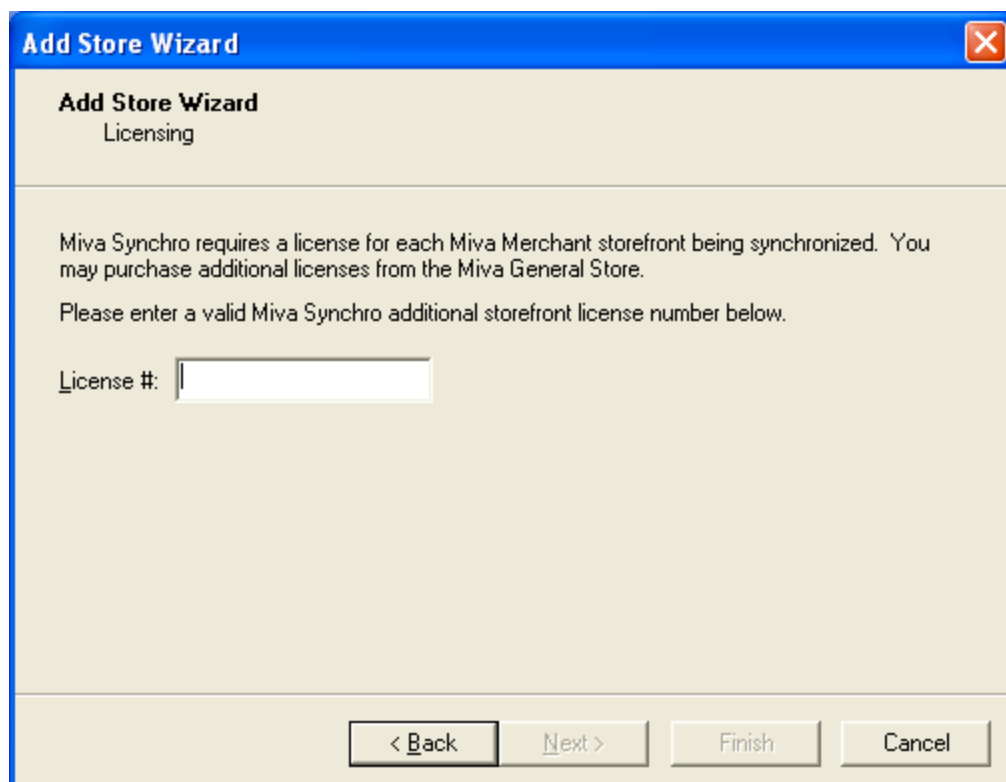
Before starting the Add Store Wizard, please start QuickBooks and open the company file that you will be synchronizing using Miva Synchro.

Press the “Add Store” button to begin the Add Store Wizard. The Add Store Wizard will appear.

Step-by-Step

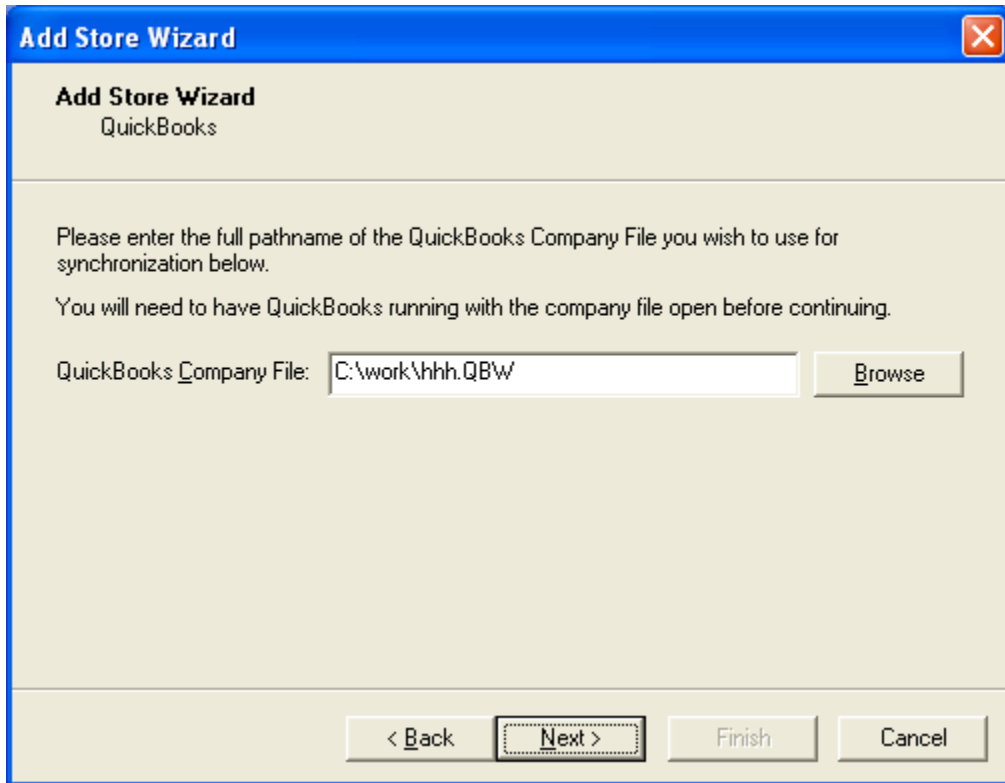


Press “Next” to begin the Add Store Wizard.



If you already have one or more storefronts configured for synchronization, the Add Store Wizard will ask for a Miva Synchro additional storefront license. If you are configuring your first store, you will not be prompted for a license number, and the Add Store Wizard will skip to the following step.

Enter a valid Miva Synchro additional storefront license number, and press “Next”.



Miva Synchro needs to know which QuickBooks company file you wish to synchronize with your Miva Merchant storefront.

Enter the full pathname of your QuickBooks company file, or use the “Browse” button to locate it. Ensure that QuickBooks is running, and has the correct company file open, and press “Next”.

Add Store Wizard
Miva Merchant

Please enter the complete URL to your Miva Merchant administration, and the login/password of a user with Administrator access. Miva Synchro will use this information to communicate with your Miva Merchant storefront.

URL:

Login:

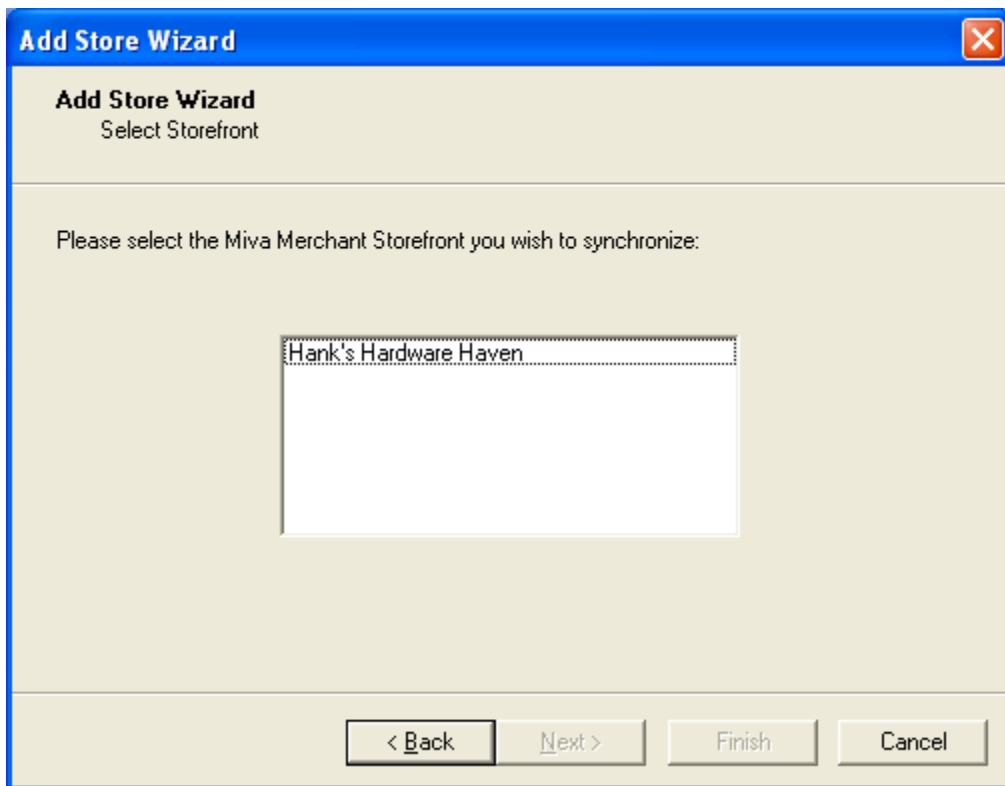
Password:

< Back Next > Finish Cancel

In order to communicate with your Miva Merchant storefront, Miva Synchro must know the correct URL to your administrative interface, and the login and password of an administrative user.

If possible, enter the secure URL to your Miva Merchant administration. This will provide additional security during the synchronization process.

After entering the information, press “Next” to continue.



The Add Store Wizard will communicate with your Miva Merchant installation and retrieve a list of storefronts. Select the storefront you wish to synchronize from the list, and press "Next".

Add Store Wizard

Add Store Wizard
Synchronized Items

Miva Synchro can synchronize three types of information with your Miva Merchant storefront. Please choose the items you wish to synchronize:

- ☐ Download Orders From Miva Merchant
- ☐ Synchronize Product Information
- ☐ Synchronize Customer Account Information

< Back Next > Finish Cancel

Select the type(s) of information you wish to synchronize, and press “Next”.

Add Store Wizard

Add Store Wizard
Order Synchronization Style

Downloaded orders can be created in QuickBooks as either Sales Receipts or Invoices. Please indicate your preference below. If you are unsure which is appropriate for your business, please use the QuickBooks Getting Started page.

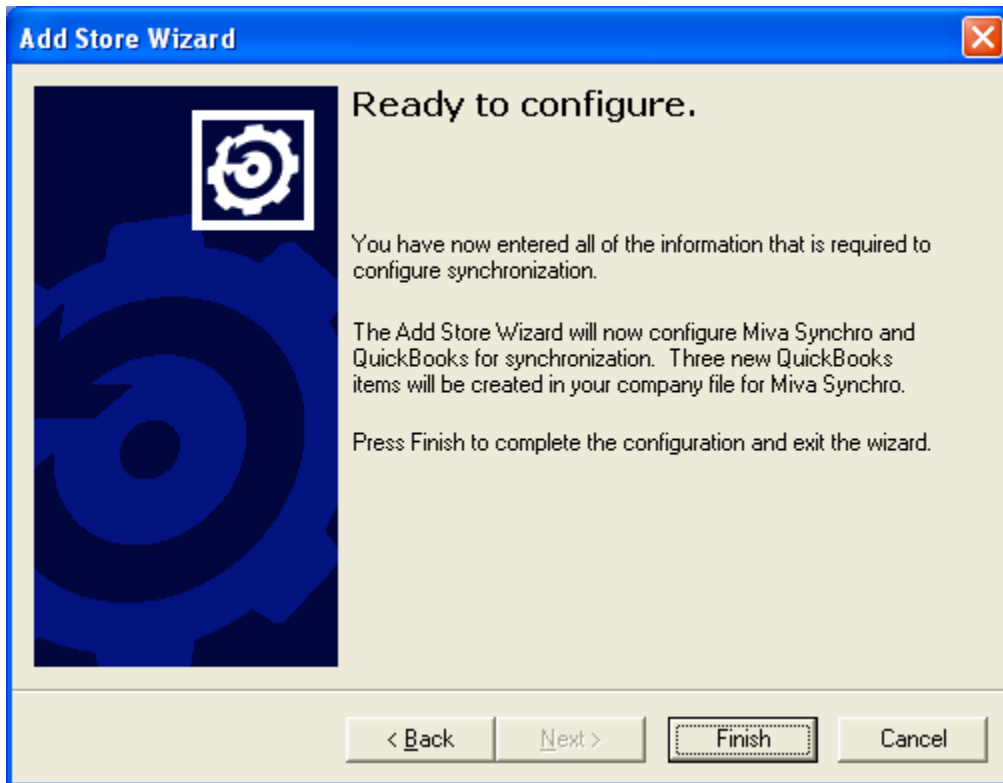
Record Orders As: Invoices

< Back Next > Finish Cancel

If you selected “Download Orders from Miva Merchant”, the Order Synchronization Style step will appear. Otherwise, the Add Store Wizard will skip to the next step.

Miva Synchro can be configured to create Miva Merchant orders as either Invoices or Sales Receipts in QuickBooks. Please see the section Invoices vs Sales Receipts to determine which is most appropriate for your accounting method.

Select either Invoices or Sales Receipts and press “Next”.



At this point the Add Store Wizard is ready to begin the configuration process. Depending on the options you selected, this may involve creating Shipping and Sales Tax items in your QuickBooks company file. The process may take several minutes. Please be patient.

How the Wizard Configures Miva Synchro

The Add Store Wizard attempts to configure Miva Synchro with reasonable default settings for most applications. Any of the settings may, of course, be modified at any time.

Below is a list of the default settings created by the Add Store Wizard.

Order Synchronization

Order Prefix: mm-

No Sales Rep

AR/Deposit Account: 1200 - Accounts Receivable

Terms: None

Shipping: Create/Use Miva Merchant Shipping Method
Shipping: Create Invoice Line Item
Shipping Item: mm-shipping (created in QuickBooks by the wizard)
Other Item: mm-other (create in QuickBooks by the wizard)
Sales Tax: Create Invoice Line Item
Line Tax Item: mm-tax-item (created in QuickBooks by the wizard)
Invoice Tax Item: mm-tax-invoice (created by the wizard)

Product Synchronization

Synchronize Products Created in Miva Merchant
Synchronize Products Created in QuickBooks
Conflicts: QuickBooks Overwrites Miva Merchant
Sync Direction: Both
Full Product Scan at Next Synchronization
COGS: 5000 - Cost of Goods Sold
Asset: <none>
Income: 4010 – Sales
Taxable: Tax
Non-Taxable: Non

Customer Synchronization

Synchronize Customers Created in Miva Merchant
Synchronize Customers Created in QuickBooks
Conflict Resolution: QuickBooks Overwrites Miva Merchant
Sync Direction: Both
Full Customer Scan at Next Synchronization

Basic Functionality

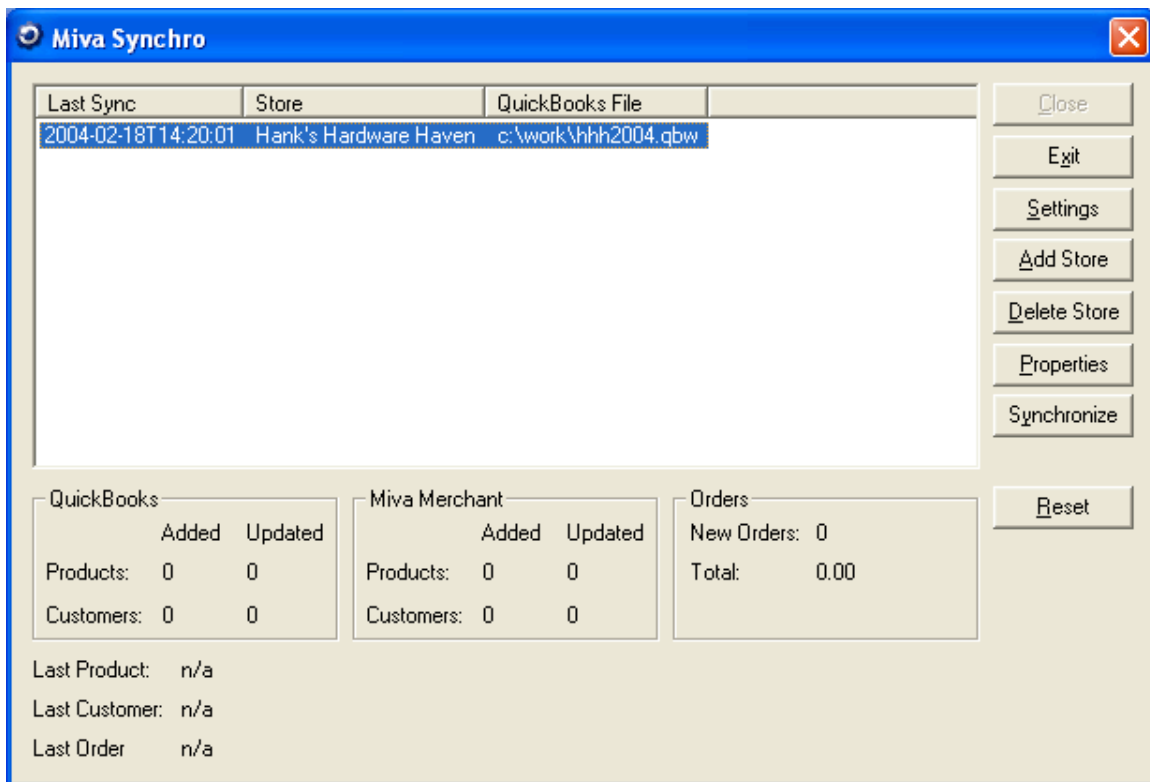
Starting/Stopping

To start Miva Synchro, select “Miva Synchro” from the “Miva Synchro” folder under your Start menu >> Programs.

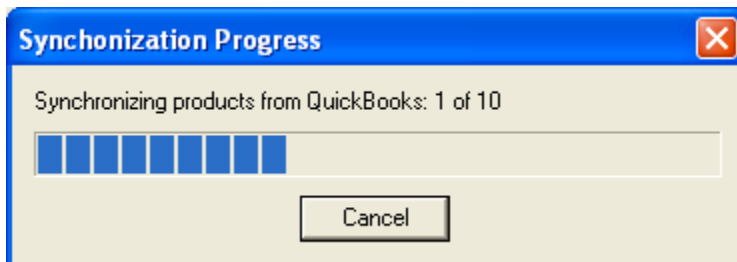
To stop Miva Synchro, select “Exit” from the “Miva Synchro” dialog, or right click on the Miva Synchro icon in your Windows Taskbar and select “Exit”.

Manual Synchronization

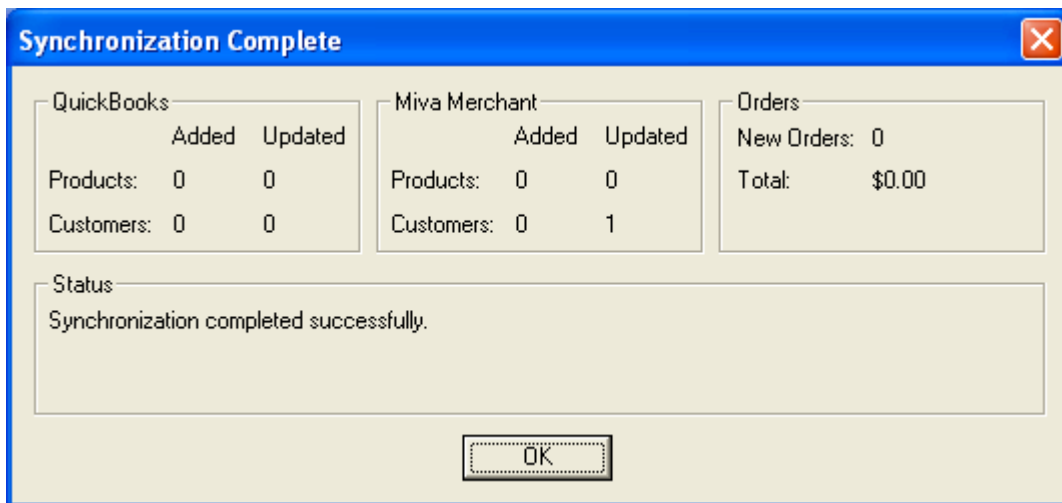
To initiate a manual synchronization, select the store you wish to synchronize in the “Miva Synchro” dialog, and press the “Synchronize” button.



The “Synchronization Progress” dialog will appear. You may press “Cancel” at any time to abort the synchronization process.



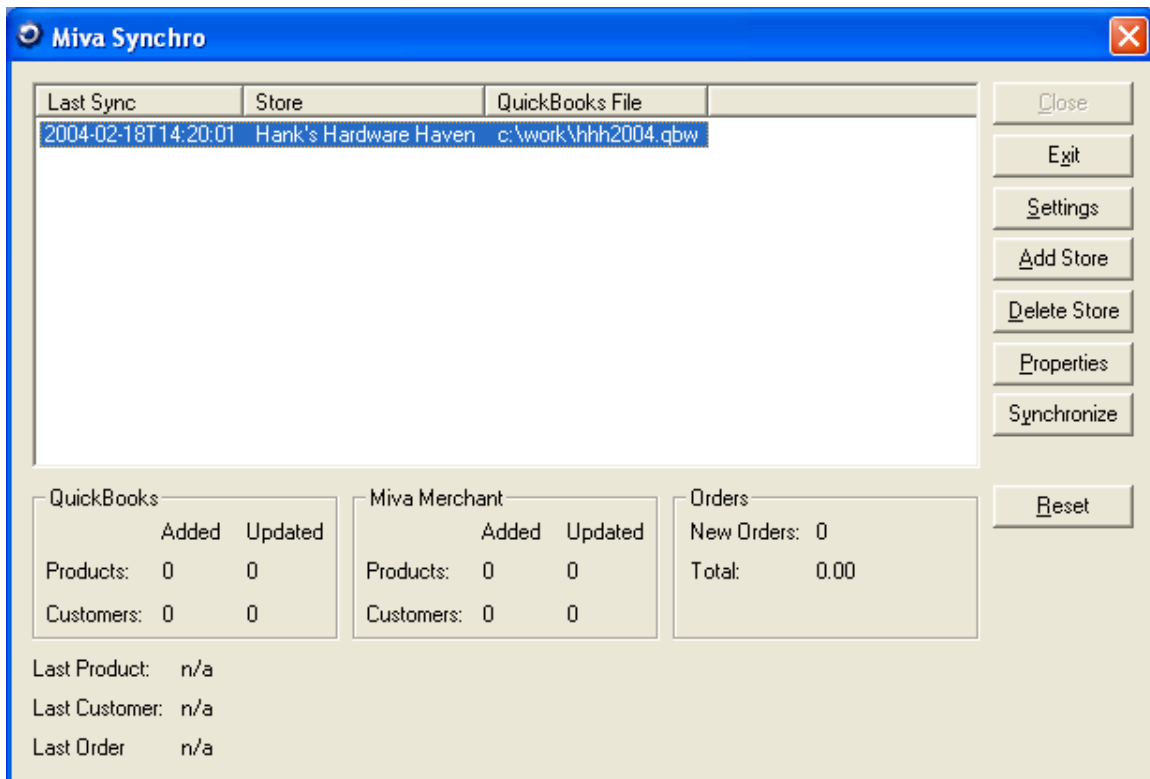
Once synchronization has completed, the “Synchronization Complete” dialog will appear, providing you with a summary of the synchronization.



Store Properties

Miva Synchro maintains different configuration settings for each Miva Merchant storefront you have configured for synchronization. These settings are configurable through the “Properties” dialog.

To configure store properties, select a store from the “Miva Synchro” dialog and press the “Properties” button.



The “Properties” dialog will appear.

Properties

Miscellaneous

Name:

Synchronization Log:

License #:

QuickBooks

File:

Miva Merchant

URL:

Store Code:

Login: Password:

☐ Place Store in Maintenance Mode During Synchronization

Synchronization

☒ Manual

☐ Automatically synchronize every

Miscellaneous Store Settings

Miscellaneous

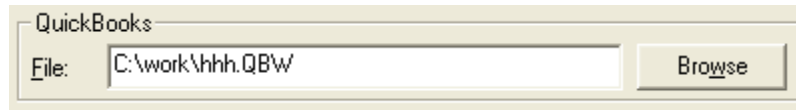
Name:

Synchronization Log:

License #:

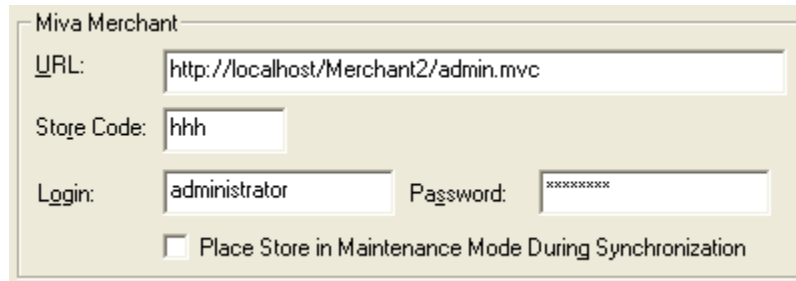
Setting	Description
Name	The value entered here is displayed in the main Miva Synchro dialog and is used to identify the store. By default, the Add Store Wizard uses the name of your Miva Merchant storefront.
Synchronization Log	Optionally specifies the full path to a text file in which Miva Synchro logs synchronization progress information. Highly recommended if you are using automatic synchronization. Miva Synchro will create the file if it does not exist.
License #	The license number for this Miva Merchant storefront. See Licensing for additional information.

QuickBooks

A screenshot of a Windows-style dialog box titled "QuickBooks". It contains a "File:" label followed by a text input field containing the path "C:\work\hhh.QB\W". To the right of the text field is a "Browse" button.

Setting	Description
File	Specifies the full pathname of the QuickBooks company file used for synchronization.

Miva Merchant

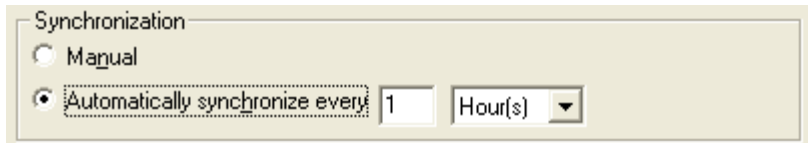
A screenshot of a Windows-style dialog box titled "Miva Merchant". It contains several fields: "URL:" with a text input field containing "http://localhost/Merchant2/admin.mvc"; "Store Code:" with a text input field containing "hhh"; "Login:" with a text input field containing "administrator"; and "Password:" with a text input field containing "xxxxxxx". Below these fields is a checkbox labeled "Place Store in Maintenance Mode During Synchronization" which is currently unchecked.

Setting	Description
URL	Specifies the full URL to the Miva Merchant administrative interface. Whenever possible, use a secure (https) URL.
Store Code	Specifies the code of the Miva Merchant storefront used for synchronization.
Login	Specifies the username of a Miva Merchant user with Administrative access.
Password	Specifies the password of the user.
Places Store in Maintenance Mode During Synchronization	<p>If checked, Miva Synchro will place your Miva Merchant storefront in Maintenance Mode during synchronization.</p> <p>This applies only to a full synchronization—downloading orders from inside QuickBooks will not take the store offline.</p>

Automatic Synchronization

Miva Synchro can be configured to perform unattended synchronization at a fixed interval (for example, every 15 minutes, or every 4 hours). You could use this feature to automatically check your Miva Merchant storefront for new orders, essentially providing automated order entry into QuickBooks.

In order to use automatic synchronization, you must have QuickBooks configured to allow Miva Synchro to login automatically to your company file. Please see the section Configuring QuickBooks Company File Access for additional information.



Under synchronization, select “Automatically synchronize every”, and specify an interval. Press the “OK” button to save your changes.

From this point forward, Miva Synchro will automatically synchronize your Miva Merchant storefront with QuickBooks. During the automatic synchronization, the Miva Synchro icon in your Windows Taskbar will rotate, and some configuration options will be unavailable.

It is highly recommended that you also configure a synchronization log when using automatic synchronization, so that you can monitor the results of synchronization for any errors.

Fields

Overview

Miva Synchro v1.50 allows full control over the mapping between Miva Merchant and QuickBooks data fields. In addition, some basic logic may be applied to the field mapping, allowing different mapping behavior in different situations.

As an example, Miva Merchant tracks separate shipping and billing contact information for a single customer, whereas QuickBooks has a single set of contact information (name, phone number, etc...). Using the logic controls, the default Customer Field Mappings for Miva Synchro populate the Miva Merchant shipping *and* billing information with the QuickBooks information when Miva Synchro *creates* a customer in Miva Merchant, but replaces only the shipping information in Miva Merchant when performing an *update*.

A Field Mapping may be created between any Miva Merchant data field and any QuickBooks data field, including custom fields in both applications. Field Mappings apply to products as well as customers.

To configure Field Mappings, select “Fields” from the store properties dialog. The “Properties: Fields” dialog will appear.

Properties: Fields

View Mappings For: **Customers**

Miva Merchant	QuickBooks	Direction	When
Login (Read Only)	Name	Merchant -> QB	Creation
Password Recovery Email	Email	Both	Both
Shipping: First Name	First Name	Both	Both
Shipping: Last Name	Last Name	Both	Both
Shipping: Company	Company Name	Both	Both
Shipping: Email	Email	QB -> Merchant	Both
Shipping: Phone	Phone	Both	Both
Shipping: Fax	Fax	Both	Both
Billing: Name (Read Only)	Contact	Merchant -> QB	Both

Miva Merchant:

- ID (Read Only)
- Login (Read Only)
- Password Recovery Email
- Password
- Shipping: Name (Read Only)
- Shipping: Last, First (Read Only)
- Shipping: First Name
- Shipping: Last Name
- Shipping: Email

QuickBooks:

- Name
- Active
- Company Name
- Salutation
- First Name
- Middle Name
- Last Name
- Suffix
- Billing Address: Street Address (Re.)

Direction:

When:

Buttons: OK, Cancel, Default, Add, Update, Delete

The “View Mappings For” drop-down list allows you to control which set of mappings you are modifying.

View Mappings For	Description
Customers	Field mappings used when synchronizing customers.
Orders	Field mappings used when creating/matching a QuickBooks Customer for a Miva Merchant Order. (Required when synchronizing an order without an attached Miva Merchant customer).
Non-Inventory Items	Field mappings used when synchronizing a Miva Merchant product with a QuickBooks Non-inventory Part.
Inventory Items	Field mappings used when synchronizing a Miva Merchant product with a QuickBooks Inventory Part.
Item Groups	Field mappings used when synchronizing a Miva Merchant product with a QuickBooks Group item.
Inventory Assemblies	Field mappings used when synchronizing a Miva Merchant product with a QuickBooks Inventory Assembly.

Displayed at the top of the dialog is a list of the current mappings.

Pressing the “Default” button will reset the currently selected set of mappings to the initial defaults.

Selecting a mapping from this list will highlight the Miva Merchant and QuickBooks fields in the lists below, and enable the “Add”, “Update”, and “Delete” buttons.

Properties: Fields

View Mappings For: Customers

Miva Merchant	QuickBooks	Direction	When
Login (Read Only)	Name	Merchant -> QB	Creation
Password Recovery Email	Email	Both	Both
Shipping: First Name	First Name	Both	Both
Shipping: Last Name	Last Name	Both	Both
Shipping: Company	Company Name	Both	Both
Shipping: Email	Email	QB -> Merchant	Both
Shipping: Phone	Phone	Both	Both
Shipping: Fax	Fax	Both	Both
Billing: Name (Read Only)	Contact	Merchant -> QB	Both

Miva Merchant:

- Password Recovery Email
- Password
- Shipping: Name (Read Only)
- Shipping: Last, First (Read Only)
- Shipping: First Name
- Shipping: Last Name
- Shipping: Email
- Shipping: Company
- Shipping: Phone

Direction: Both

When: Both

QuickBooks:

- Name
- Active
- Company Name
- Salutation
- First Name
- Middle Name
- Last Name
- Suffix
- Billing Address: Street Address (Re.

Buttons: OK, Cancel, Default, Add, Update, Delete

Pressing the “Add” button will add a new field mapping with the currently selected settings.

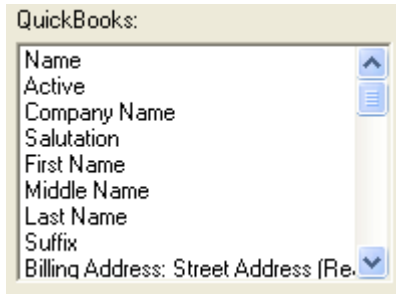
Pressing the “Update” button will modify the highlighted field mapping with the currently selected settings.

Pressing the “Delete” button will remove the highlighted field mapping.

Miva Merchant:

- ID (Read Only)
- Login (Read Only)
- Password Recovery Email
- Password
- Shipping: Name (Read Only)
- Shipping: First Name
- Shipping: Last Name
- Shipping: Email
- Shipping: Company

The control under the text “Miva Merchant” displays a list of the Miva Merchant fields available for the currently selected mapping list, including any custom fields defined within Miva Merchant (requires Miva Merchant v4.23 or newer, and a supporting custom fields module). For more information on custom fields, see Custom Fields.

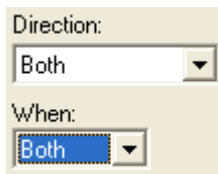


The control under the text “QuickBooks” displays a list of the QuickBooks field available for the currently selected mapping list. Any QuickBooks Custom Fields appear with the text “Custom Field:” before the field name. For more information on custom fields, see Custom Fields.

Some of the Miva Merchant and QuickBooks fields are indicated as “(Read Only)”. These fields may only be read, not set. If Miva Synchro encounters a situation where it would attempt to write a value to a read-only field, it will simply ignore it.

Logic Controls

The “Direction” and “When” controls allow you to apply logic to your field mappings.



Direction	Description
QB -> Merchant	This field mapping applies only when Miva Synchro is updating a Miva Merchant product/customer with changes from a QuickBooks item/customer.
Merchant -> QB	This field mapping applies only when Miva Synchro is updating a QuickBooks item/customer with changes from a Miva Merchant product/customer.
Both	This field mapping always applies.

When	Description
Creation	This field mapping applies only when a new item/product/customer is being created.
Update	This field mapping applies only when an existing item/product/customer is being updated.
Both	This field mapping always applies.

Custom Fields

Miva Synchro v1.50 fully supports custom field synchronization. However, versions of QuickBooks older than QuickBooks 2004 do not allow applications such as Miva Synchro to update custom field values, so when using QuickBooks 2003, QuickBooks custom fields are read-only.

Custom Fields within Miva Merchant may be synchronized in both directions only in Miva Merchant v4.23 or newer, and only if the module providing the custom fields supports the synchronization API. If you are using Miva Merchant v4.23 or newer and a 3rd party custom fields module, please contact the developer of the module to determine if synchronization with Miva Synchro is supported.

Downloading Orders

Overview

Miva Synchro is capable of downloading your Miva Merchant orders and creating corresponding QuickBooks Invoices or Sales Receipts.

Invoices/Sales Receipts created by Miva Synchro are differentiated from manually created items by a prefix that is prepended to the Miva Merchant order number. If you used the Add Store Wizard to configure Miva Synchro, the default prefix is “mm-”.

You may also configure Miva Synchro to associate its Invoices/Sales Receipts with a particular QuickBooks Sales Rep, which will allow you to use the QuickBooks reporting features to monitor the performance of your Miva Merchant storefront.

To configure order download, select “Orders” from the store properties dialog. The “Properties: Orders” dialog will appear.

Properties: Orders

Synchronization Settings

☒ Synchronize Orders Created in Miva Merchant

☒ Detect out of Sequence Orders

Order # Prefix: Last Order #:

Sales Rep: Deposit Account:

Record Orders As: AR Account:

Terms

☒ None

☐ Create/Use Miva Merchant Payment Method

☐ Use Fixed:

Shipping

☐ Don't set Shipping Method

☒ Create/Use Miva Merchant Shipping Method

☐ Use Fixed:

Sales Tax

☐ Allow QuickBooks to Apply/Recalculate

☒ Create Invoice Line Item

Line Tax Item:

Invoice Tax Item:

Line Items

☒ Create Line Item for Shipping Charges

☒ Create Line Item for Other (Coupon) Charges

Shipping Item:

Other Item:

OK Cancel

Basic Settings

Synchronization Settings

☒ Synchronize Orders Created in Miva Merchant

☒ Detect out of Sequence Orders

Order # Prefix: mm- Last Order #: 1005

Sales Rep: <none> Deposit Account:

Record Orders As: Invoices AR Account: Accounts Receivable

Setting	Description
Synchronize Orders Created in Miva Merchant	Enables or disables the entire order synchronization process.
Detect out of Sequence Orders	If checked, Miva Synchro will detect and attempt to re-download order numbers that appear out of order.
Order # Prefix	Specifies a prefix that is prepended to Miva Merchant order numbers to prevent conflicts within QuickBooks.
Last Order #	Specifies the last order that was downloaded by Miva Synchro. Miva Synchro automatically updates this setting as orders are downloaded, but it may be manually overridden to force the re-download of one or more orders.
Sales Rep	Specifies an optional QuickBooks Sales Rep that is associated with Invoices/Sales Receipts created for Miva Merchant orders.
Record Orders As	Specifies whether Miva Merchant orders are created within QuickBooks as Invoices or Sales Receipts. See Invoices vs Sales Receipts for more information.
Deposit Account	Specifies a deposit account that is used when creating Sales Receipts.
AR Account	Specifies an AR Account that is used when creating Invoices.

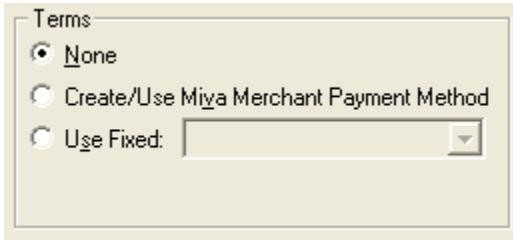
Invoices vs Sales Receipts

Miva Synchro can be configured to create either Invoices or Sales Receipts from your Miva Merchant orders. The primary difference between the two items is the way that the payment for the order is “booked”. Invoices apply the amount of the order to an “Accounts Receivable” account, which is then settled at a later date. Sales Receipts credit the funds directly into a bank account or “Undeposited Funds” account.

If you receive payment after an order is placed (for example: COD or payment by check), Invoices are probably the best solution for your needs. In addition, some merchants prefer to record their orders as Invoices, even if they are receiving payment via credit card, so that they can move funds from Accounts Receivable to an actual account as the credit card charges settle with the processor.

Terms (Invoices)/Payment Method (Sales Receipts)

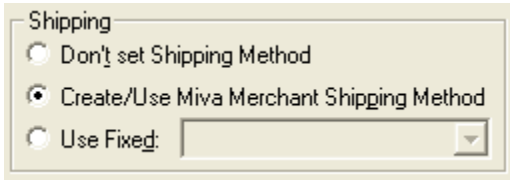
QuickBooks associates a set of Payment Terms for each Invoice, or a Payment Method for each Sales Receipt. Miva Synchro provides the following options:



Setting	Description
None	Miva Synchro will not associate a set of Terms or a Payment Method with the Invoice/Sales Receipt.
Create/Use Miva Merchant Payment Method	Miva Synchro will automatically create (or use if existing) a set of Terms/Payment Method with the same name as the payment method for the Miva Merchant order (for example: COD or Visa).
Use Fixed	Miva Synchro will always use the Terms/Payment Method selected.

Shipping

QuickBooks provides a mechanism to associate a Shipping Method with an Invoice/Sales Receipt. Miva Synchro can optionally apply a QuickBooks Shipping Method to Invoices/Sales Receipts.



Setting	Description
Don't set Shipping Method	Miva Synchro will leave the "Shipping Method" field on Invoices/Sales Receipts blank.
Create/Use Miva Merchant Shipping Method	Miva Synchro will automatically create (or use if existing) a QuickBooks Shipping Method with the same name as the shipping method for the Miva Merchant order (for example: Next Day Air).
Use Fixed	Miva Synchro will always use the QuickBooks Shipping Method selected.

Line Items

Miva Synchro can create Invoice/Sales Receipts line items for some non-product charges, including Miva Merchant calculated shipping charges and charges applied to an order for coupons, etc...

Line Items

☒ Create Line Item for Shipping Charges

☒ Create Line Item for Other (Coupon) Charges

Shipping Item:

Other Item:

Setting	Description
Create Line Item for Shipping Charges	If checked, Miva Synchro will create a line item for shipping charges.
Create Line Item for Other (Coupon) Charges	If checked, Miva Synchro will create line items for other charges applied to an order, such as discounts or coupons.
Shipping Item	Specifies a QuickBooks Other Charge Item that is used for shipping-related line items. Miva Synchro requires that a Shipping Item always be specified because some Miva Merchant modules create Shipping-related charges that need to be specially handled, such as the COD Charge created by the COD payment module.
Other Item	Specifies a QuickBooks Other Charge Item that is used for non-shipping related line items.

Sales Tax

QuickBooks provides advanced mechanisms for tracking sales tax received from customers and due to tax agencies. Miva Synchro can be configured to ignore the Miva Merchant calculated Sales Tax (allowing QuickBooks to recalculate sales tax using its mechanisms), or to create Invoice/Sales Receipt line items reflecting the Miva Merchant calculated tax.

If you chose to have Miva Synchro create Invoice/Sales Receipt line items, you will need two QuickBooks Sales Tax Items. One will be associated with the line items created by Miva Synchro for sales tax (the Line Tax Item), and one will be associated with the entire invoice, and will usually have a 0% tax rate.

You can configure your Line Tax Item to use the appropriate Tax Agency for your specific needs. See the QuickBooks documentation for further details.

Sales Tax

☐ Allow QuickBooks to Apply/Recalculate

☒ Create Invoice Line Item

Line Tax Item:

Invoice Tax Item:

Setting	Description
---------	-------------

Allow QuickBooks to Apply/Recalculate	Miva Synchro will not create Sales Tax line items.
Create Invoice Line Item	Miva Synchro will create Sales Tax line items to reflect the sales tax calculated by Miva Merchant.
Line Tax Item	Specifies the QuickBooks Sales Tax Item that is associated with the line items created by Miva Synchro.
Invoice Tax Item	Specifies the QuickBooks Sales Tax Item that is associated with the Invoice/Sales Receipt as a whole. Typically this sales tax item will have a tax rate of 0%.

Synchronization

Overview

Miva Synchro can perform true synchronization of both Product and Customer data, allowing changes in either QuickBooks or Miva Merchant to be automatically reflected in the other application.

Explanation of Common Settings

Both Product and Customer synchronization share some common settings (although the settings may be configured differently for each type of data). These settings control the basic synchronization functionality, such as which application contains the “master” copy of the data, and which direction(s) changes in data should flow.

Synchronize Products/Customers Created In...

- ☒ Synchronize Products Created in Miva Merchant
- ☒ Synchronize Products Created in QuickBooks

Miva Synchro can be configured to ignore newly created Products/Customers in either application. For example, you may create products in your QuickBooks company file that are not available to online customers, and therefore wish that those products not be created in Miva Merchant. To accomplish this, you would un-check the “Synchronize Products Created in QuickBooks” checkbox. The same logic applies to Customers.

Note: In some cases during order downloading, Miva Synchro **must** create a Product or Customer in QuickBooks, regardless of the values of these settings. This is due to limitations of the QuickBooks software.

Conflict Resolution

Conflict Resolution: QuickBooks Overwrites Miva Merchant ▼

Miva Merchant Overwrites QuickBooks

QuickBooks Overwrites Miva Merchant

If changes are made to a Customer or Product in both applications in between synchronizations, a conflict occurs. The Conflict Resolution setting controls which set of changes are kept in this situation.

Sync Direction

Sync Direction: Do Not Synchronize Products ▼

- Both
- QuickBooks -> Miva Merchant
- Miva Merchant -> QuickBooks
- Do Not Synchronize Products

Miva Synchro can be configured to ignore changes in either Miva Merchant or QuickBooks.

Setting	Description
Both	Changes are synchronized in both directions.
Miva Merchant -> QuickBooks	Changes made in QuickBooks are ignored, but changes made in Miva Merchant are applied to QuickBooks.
QuickBooks -> Miva Merchant	Changes made in Miva Merchant are ignored, but changes made in QuickBooks are applied to Miva Merchant.
Do Not Synchronize ...	Completely disables synchronization, except where required by Order synchronization.

Full Scan

☐ Full Product Scan at Next Synchronization

If checked, Miva Synchro will attempt to synchronize all Customers/Products in your QuickBooks company file/Miva Merchant storefront. Otherwise, Miva Synchro will only look at Customers/Products that have been modified since the last synchronization. These settings reset themselves after a successful synchronization.

The Add Store Wizard automatically configures Miva Synchro for full scans on first synchronization.

Recreate Previously Deleted

☐ Recreate Previously Deleted Products

When Miva Synchro encounters a Product or Customer that has been deleted in Miva Merchant, it marks the item within QuickBooks as *inactive*, but does not delete it, as other entries within QuickBooks may reference the item.

If this option is checked, during a full scan, or when Miva Synchro detects modifications to a previously deleted Customer/Product, the Customer/Product will be recreated in Miva Merchant. Otherwise, Miva Synchro will skip the Customer/Product.

Product Synchronization

Overview

Miva Synchro is capable of synchronizing products in both directions and automatically managing inventory. This allows you to manage your Miva Merchant products, including pricing & inventory from within QuickBooks.

To configure Product synchronization settings, select “Products” from the store properties dialog. The “Properties: Products” dialog will appear.

Properties: Products

Synchronization Settings

☒ Synchronize Products Created in Miva Merchant ☐ Full Product Scan at Next Synchronization

☒ Synchronize Products Created in QuickBooks ☐ Recreate Previously Deleted Products

☐ Track Cost for Non-Inventory Items

Conflict Resolution: QuickBooks Overwrites Miva Merchant

Sync Direction: Both

Selective Synchronization Custom Field:

Assign New Products to the Following:

Price Groups:

Availability Groups:

Accounts

COGS: Cost of Goods Sold

Asset: <none>

Income: Sales:Merchandise

Expense:

Tax Codes

Taxable: Tax

Non Taxable: Non

OK Cancel

Inventory vs. Non-Inventory

Using the Miva Merchant product inventory feature, Miva Synchro can automatically maintain your inventory within Miva Merchant. If you track inventory for your QuickBooks items, Miva Synchro will automatically configure your Miva Merchant products for inventory. However, you will have to enable the inventory tracking feature in Miva Merchant, and configure the storewide inventory settings manually.

See the Miva Merchant documentation for more details on configuring the product inventory feature.

See the QuickBooks documentation for information on tracking inventory within QuickBooks.

When synchronizing inventory, Miva Synchro considers QuickBooks to be the “master” copy, and always updates Miva Merchant to match the inventory in QuickBooks. Therefore, if you wish to adjust the Miva Merchant inventory, you will have to adjust the inventory from within QuickBooks.

To use inventory with Miva Synchro, you must specify an Asset Account in the product synchronization settings. The Add Store Wizard does not configure an asset account

automatically. See Accounts for more information on configuring QuickBooks accounts for product synchronization.

Group Items and Inventory Assemblies

Miva Synchro fully supports QuickBooks Group Items and Inventory Assemblies. Both are mechanisms that QuickBooks provides to easily sell multiple products under a single SKU.

Group items are fully supported with QuickBooks 2004, and partially supported with QuickBooks 2003. If you are using QuickBooks 2003, Miva Synchro will be unable to update Group Items within QuickBooks, but will create/synchronize Miva Merchant products for Group Items and properly account for them when downloading orders.

Inventory Assemblies require QuickBooks Premier 2004 for most functionality.

See the QuickBooks documentation for more information on both Group Items and Inventory Assemblies.

Tracking Cost for Non-Inventory Items

☐ Track Cost for Non-Inventory Items

By default, QuickBooks does not track cost for products unless you are also tracking inventory. However, by checking the “This item is purchased for and sold to a specific customer:job” checkbox in the QuickBooks “Edit Item” screen, you may track the cost of a non-inventory item.

If you have non-inventory items that contain cost information in QuickBooks, Miva Synchro will automatically synchronize the cost information with Miva Merchant, regardless of the setting of the “Track Cost for Non-Inventory Items” checkbox.

If the “Track Cost for Non-Inventory Items” checkbox is checked, Miva Merchant will, when creating new items in QuickBooks, automatically configure the items for cost tracking. You must specify an Expense account in the product synchronization settings to use this option. See Accounts for more information on configuring QuickBooks accounts for product synchronization.

Selective Synchronization

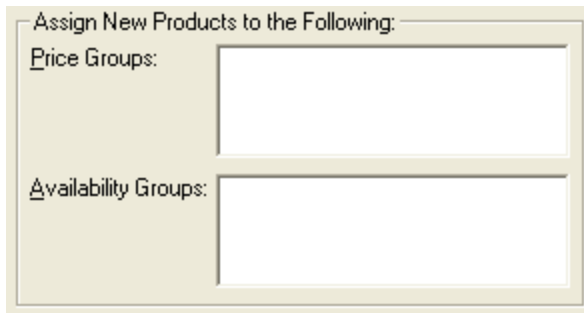


There are times when you may not want to synchronize all of the products in your QuickBooks company file with Miva Merchant. In order to accomplish this, use the Selective Synchronization Feature.

The Selective Synchronization Custom Field drop-down displays a list of the QuickBooks Item Custom Fields you have configured (if any). If you select a custom field from the

drop-down, Miva Synchro will only synchronize QuickBooks products that have the value “Y” for the custom field.

Price/Availability Groups



Assign New Products to the Following:

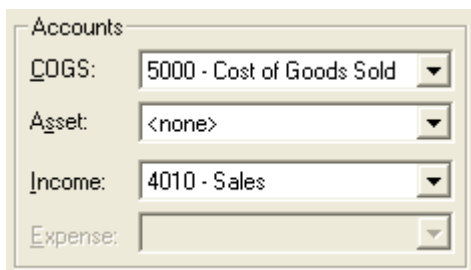
Price Groups:

Availability Groups:

When products are created in Miva Merchant, Miva Synchro can automatically assign the newly created products to one or more Price/Availability groups. Highlight the Price/Availability groups that you wish to have assigned to new products. To select more than one item, hold down the Ctrl key while clicking on the items with the mouse.

Accounts

QuickBooks associates several different accounts with each item (product) in order to provide full accounting for product sales. Miva Synchro must be configured to use the correct QuickBooks accounts.



Accounts

COGS: 5000 - Cost of Goods Sold

Asset: <none>

Income: 4010 - Sales

Expense:

Setting	Description
COGS	Specifies the QuickBooks Cost of Goods Sold account.
Asset	Specifies the QuickBooks Asset account. This setting may not be set to “<none>” if you are using inventory.
Income	Specifies the QuickBooks Income account.
Expense	Specifies the QuickBooks Expense account used when tracking cost for non inventory items. This option is only available if the “Track Cost for Non-Inventory Items” checkbox is checked.

Tax Codes

Miva Merchant tracks whether each individual product is taxable or not. By default, QuickBooks creates two tax codes: “Tax” for taxable products, and “Non” for non-taxable products. The Add Store Wizard automatically configures the “Tax” and “Non” tax codes appropriately, but those settings may be overridden.

Tax Codes

Taxable: Tax ▼

Non Taxable: Non ▼

Setting	Description
Taxable	The tax code that is applied to QuickBooks items created when synchronizing a Miva Merchant product marked as taxable. In addition, only QuickBooks items assigned this tax code will be created as taxable in Miva Merchant.
Non Taxable	The tax code that is applied to QuickBooks items created when synchronizing a Miva Merchant product marked as non-taxable.

Customer Synchronization

Overview

Miva Synchro is capable of synchronizing customer account information in both directions. Logins and passwords are automatically generated for existing QuickBooks customers.

To configure Customer synchronization settings, select “Customers” from the store properties dialog. The “Properties: Customers” dialog will appear.

Properties: Customers

Synchronization Settings

☒ Synchronize Customers Created in Miva Merchant

☒ Synchronize Customers Created in QuickBooks

Conflict Resolution: QuickBooks Overwrites Miva Merchant

Sync Direction: Both

☐ Full Customer Scan at Next Synchronization

☐ Recreate Previously Deleted Customers

Assign New Customers to The Following Miva Merchant

Price Groups:

Availability Groups:

Mailing Lists:

OK

Cancel

Limitations

When dealing with a new customer account in Miva Merchant or QuickBooks, Miva Synchro does not attempt to match customer accounts between applications. Instead, a new customer account is always created (further synchronizations will, however, behave normally). This is done to prevent accidentally revealing sensitive customer information by making an incorrect customer match between the applications.

Price/Availability Groups

Assign New Customers to The Following Miva Merchant

Price Groups:

Availability Groups:

Mailing Lists:

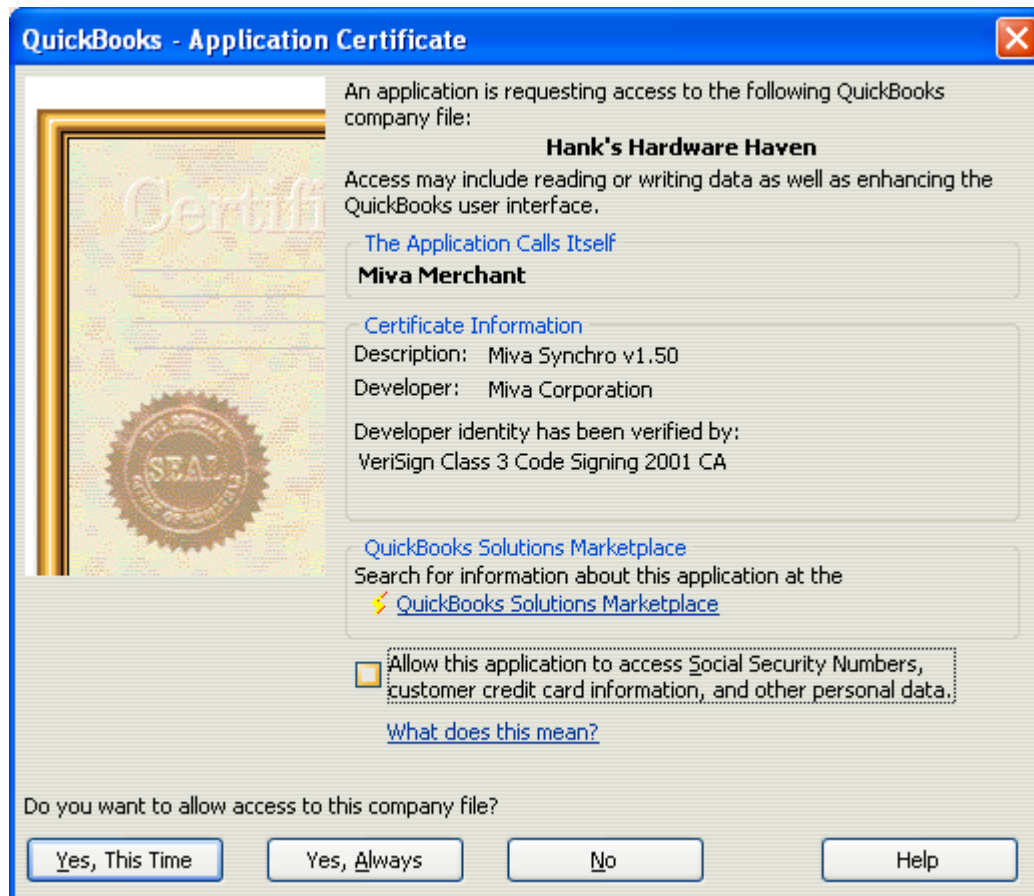
When customers are created in Miva Merchant, Miva Synchro can automatically assign the newly created customers to one or more Price/Availability groups, as well as Miva Mailer Mailing Lists. Highlight the Price/Availability groups that you wish to have assigned to new customers. To select more than one item, hold down the Ctrl key while clicking on the items with the mouse.

Mailing Lists/Integration with Miva Mailer

By assigning newly created Miva Merchant customers to one or more Miva Mailer Mailing Lists, Miva Synchro makes it possible for Miva Mailer users to inform existing QuickBooks customers of their “new” online storefront login/password. See <http://www.miva.com/products/mailer/> for more information on Miva Mailer.

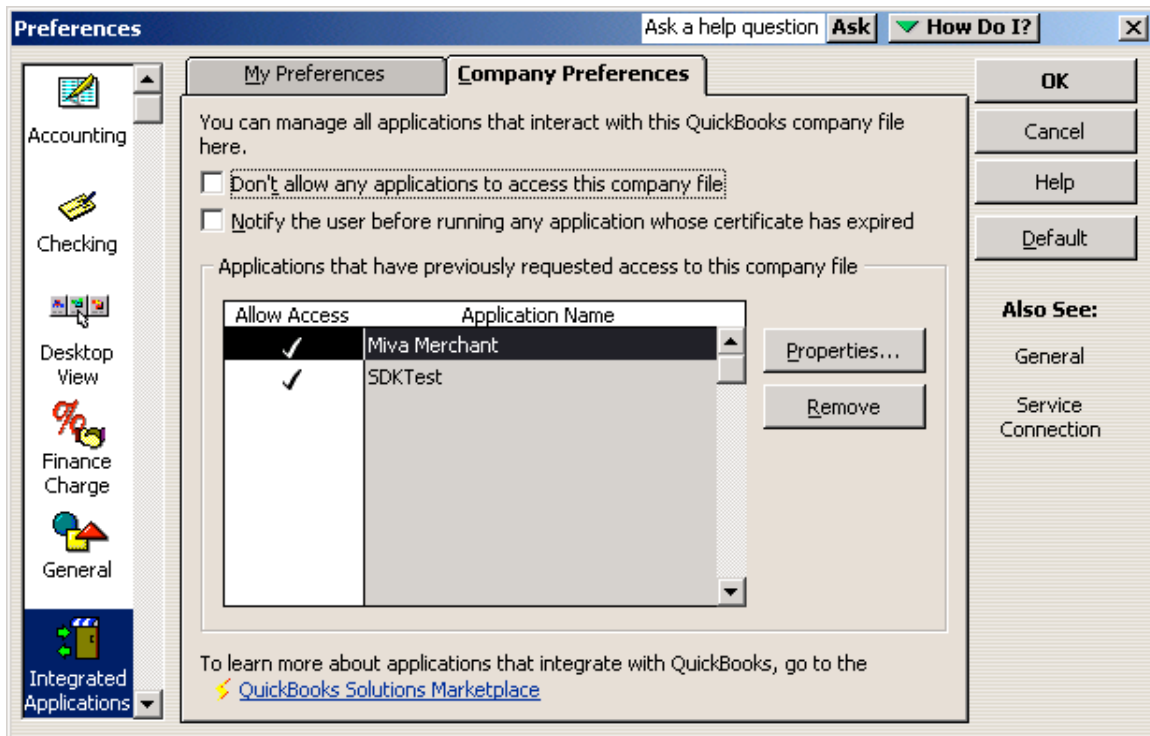
Configuring QuickBooks Company File Access

Miva Synchro communicates with QuickBooks using the QuickBooks API. By default, QuickBooks **must** be running, and have the correct company file open, for Miva Synchro to access the company file. Whenever Miva Synchro attempts to access the company file, the following dialog will appear in QuickBooks:

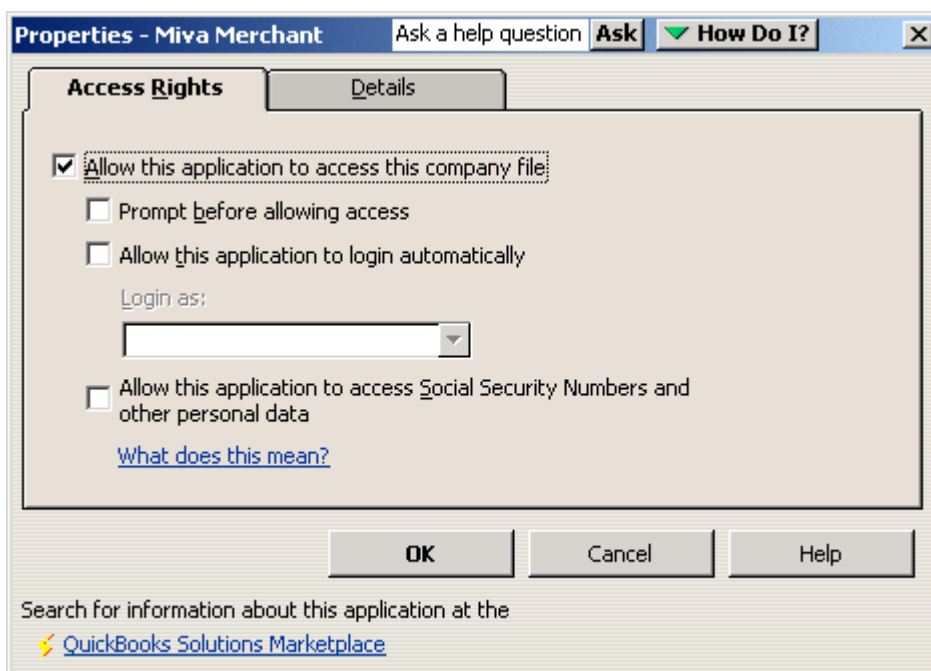


By pressing the “Yes, This Time” or “Yes, Always” buttons, you will allow Miva Synchro to access the QuickBooks file. Pressing the “No” button will deny access, and Miva Synchro will be unable to continue processing.

QuickBooks can also be configured to allow Miva Synchro to automatically login to the company file, even if QuickBooks is not currently open. To configure QuickBooks to allow automatic access, select “Preferences” from the “Edit” menu, then click on “Integrated Applications” and “Company Preferences”.



Select “Miva Merchant” and press the “Properties” button. The “Properties – Miva Merchant” dialog will appear.

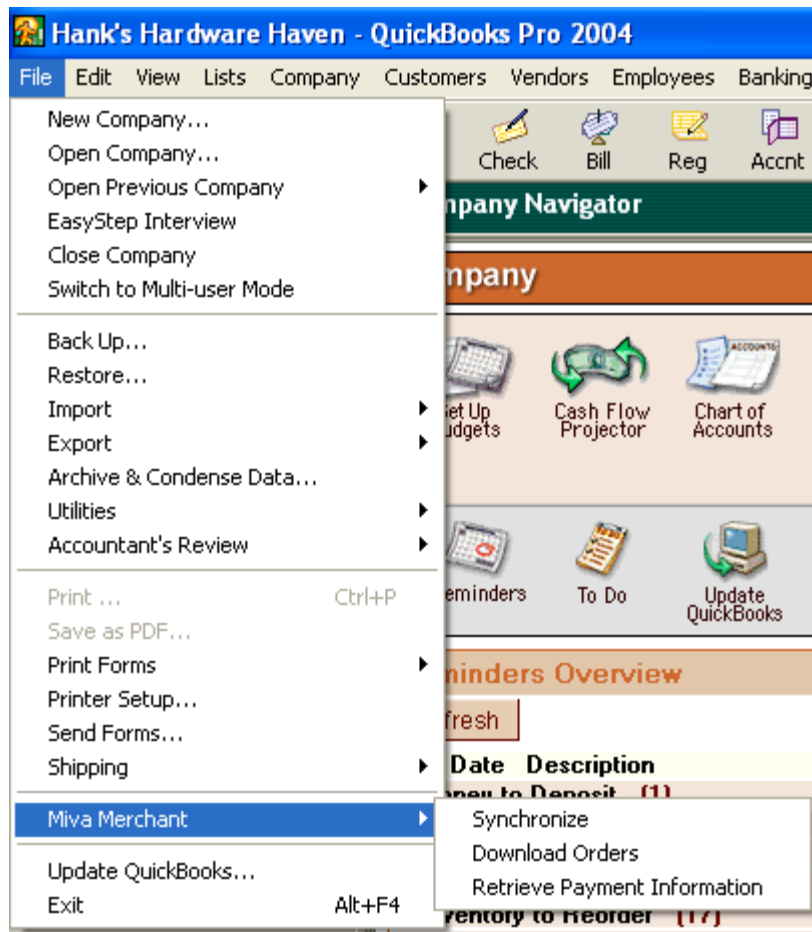


Check the “Allow this application to login automatically” checkbox, and select a user from the “Login as” drop-down list.

If QuickBooks is running, Miva Synchro will only be able to synchronize with the QuickBooks file that is currently open. In order to synchronize with more than one QuickBooks file, you must configure the files for automatic login, and may not have QuickBooks running.

SynchroHelper

The SynchroHelper application utilizes features present in QuickBooks 2004 and newer to make Miva Synchro functionality available directly from the QuickBooks menu.\



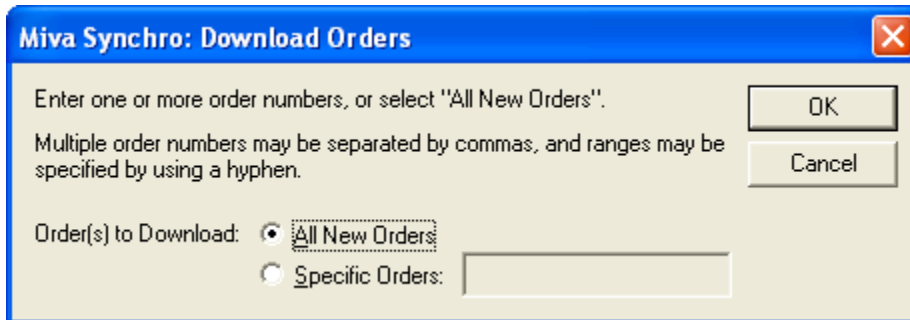
When using QuickBooks 2004 or newer, a “Miva Merchant” submenu will appear under the QuickBooks “File” menu. This submenu allows you to access Miva Synchro functionality without leaving QuickBooks.

Synchronize

Choosing the Synchronize menu choice will initiate synchronization for the current QuickBooks company file, using the settings from your Miva Synchro configuration.

Download Orders

Choosing the Download Orders menu choice will cause the “Miva Synchro: Download Orders” dialog to appear.



The dialog box has a blue title bar with the text "Miva Synchro: Download Orders" and a close button (X). The main area is light beige. It contains the following text: "Enter one or more order numbers, or select 'All New Orders'." followed by "Multiple order numbers may be separated by commas, and ranges may be specified by using a hyphen." Below this is a section "Order(s) to Download:" with two radio buttons. The first is "All New Orders" and is selected. The second is "Specific Orders:" followed by a text input field. At the bottom right are "OK" and "Cancel" buttons.

From this dialog, you may choose to download all new orders, or one or more specific order numbers.

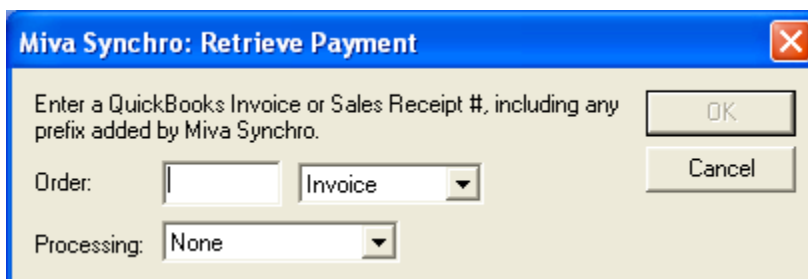
Setting	Description
All new Orders	Downloads all new orders, exactly the same as if a standard synchronization had been initiated.
Specific Orders	Downloads only the order(s) specified. You may enter a single order number, multiple order numbers separated by commas, or a range of order numbers using a hyphen. For example: 1002 1002,1003,1004 1002-1004 1002-1004,1010

Retrieve Payment Information

The Retrieve Payment Information menu choice allows you to process a Miva Merchant order and download and display payment information.

If you are using a version of QuickBooks prior to 2004, you may still access the Retrieve Payment Information functionality from your Windows Start Menu, under “Programs”, under “Miva Synchro”.

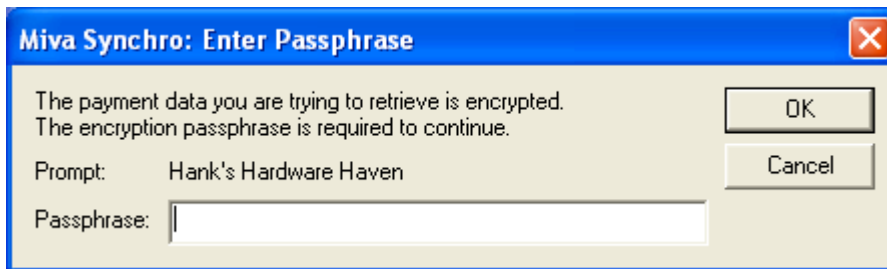
Choosing the Retrieve Payment Information menu choice will cause the “Miva Synchro: Retrieve Payment” dialog to appear.



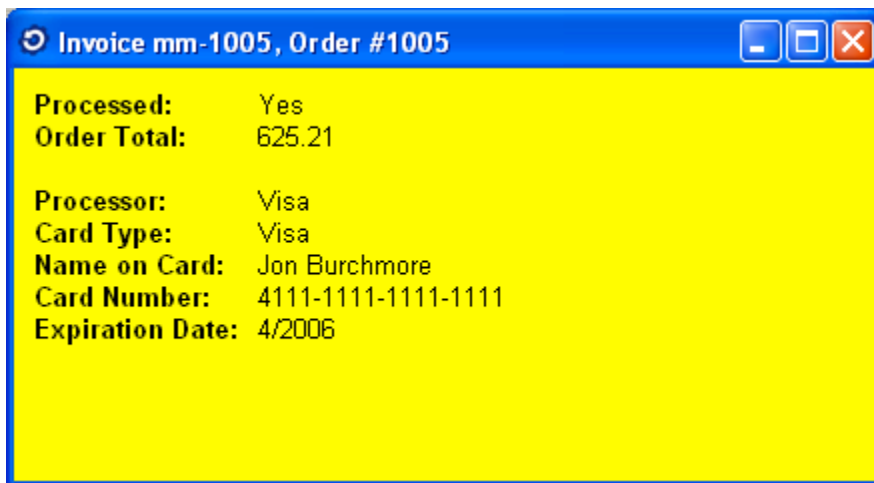
The dialog box has a blue title bar with the text "Miva Synchro: Retrieve Payment" and a close button (X). The main area is light beige. It contains the following text: "Enter a QuickBooks Invoice or Sales Receipt #, including any prefix added by Miva Synchro." followed by "OK" and "Cancel" buttons. Below this is a section "Order:" with a text input field and a dropdown menu showing "Invoice". At the bottom is a section "Processing:" with a dropdown menu showing "None".

Setting	Description
Order	Specifies the QuickBooks Invoice or Sales Receipt #, including any prefix added by Miva Synchro. Typically this will be "mm-" followed by the Miva Merchant order number. In addition, you must specify whether you are retrieving payment information for a QuickBooks Invoice or Sales Receipt.
Processing - None	No payment processing is performed
Processing - Mark as Processed	The order is marked as processed within Miva Merchant
Processing - Process	The order is processed within Miva Merchant. This is the equivalent to using the "Process Orders" feature within Miva Merchant.

If the payment information for the order you are retrieving is encrypted, the "Miva Synchro: Enter Passphrase" dialog will appear.



Enter the requested passphrase and press the "OK" button to continue. The payment information window will appear.



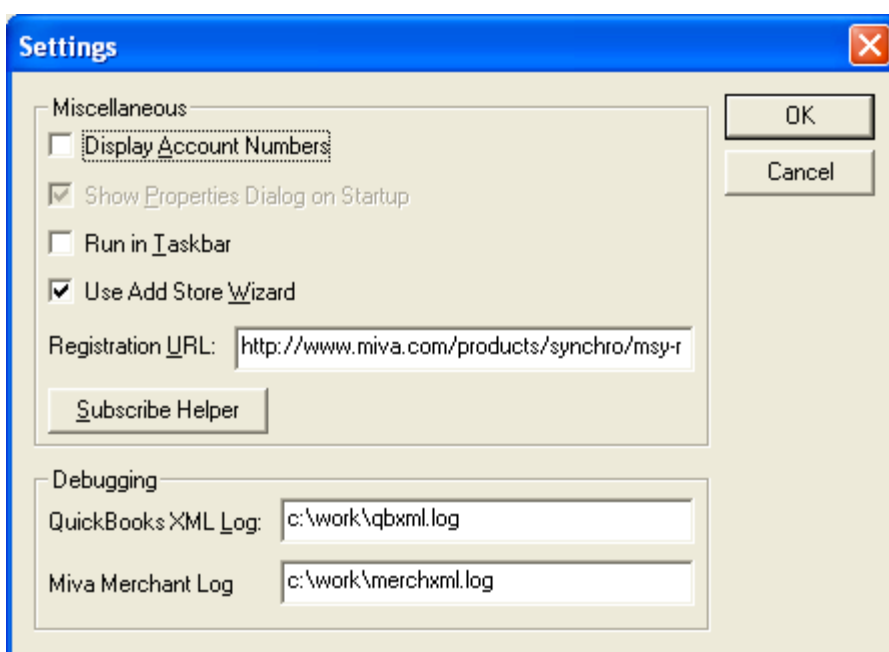
The payment information window will stay on top of other windows until it is closed. The fields that will be displayed are dependent on the payment module used within Miva Merchant.

Processor: Visa
Card Type: Visa
Name on Card: Jon Burchmore
Card Number: 4111-1111-1111-1111
Expiration Date: 4/2006

If you move the mouse pointer over a field and click the left mouse button, the value of the field will be copied to the Windows clipboard. You may then paste the value into QuickBooks or another application.

General Settings

From the main “Miva Synchro” dialog, press the “Settings” button. The “Settings” dialog will appear.



Setting	Description
Display Account Numbers	If checked, Miva Synchro will display the QuickBooks account numbers anywhere that a list of accounts is shown.
Show Properties Dialog on Startup	If checked, the main Miva Synchro dialog will appear on startup. If not checked, you may bring up the Miva Synchro dialog by right clicking on the Miva Synchro icon in the taskbar and selecting “Properties”. If “Run in Taskbar” is not checked, this option is forced on.
Run in Taskbar	If checked, Miva Synchro will run in the background, with an icon appearing in the Windows Taskbar.
Use Add Store Wizard	If checked (default), the “Add Store” button will start the Add Store Wizard. Otherwise, a blank Store Properties dialog box will appear.
Registration URL	The full URL to the Miva Synchro registration server. This setting should not be changed unless you are directed to do so by Miva Corporation.

Subscribe Helper	<p>Pressing this button re-subscribes the SynchroHelper application, which provides Miva Synchro features from within the QuickBooks 2004+ menu. If you are using QuickBooks 2004 or newer and the "Miva Merchant" submenu is not appearing, pressing this button should cause the submenu to appear after restarting QuickBooks.</p> <p>See SynchroHelper for more information.</p>
QuickBooks XML Log	<p>If specified, Miva Synchro will create a file with the pathname specified here that contains a log of all communications between Miva Synchro and QuickBooks. This setting is intended for debugging/troubleshooting usage.</p>
Miva Merchant Log	<p>If specified, Miva Synchro will create a file with the pathname specified here that contains a log of all communications between Miva Synchro and Miva Merchant. This setting is intended for debugging/troubleshooting usage.</p>