

# **Miva Synchro**

**Quick Start Guide** 

Miva Synchro v1.75

MM-MISC-401-2.0

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## Purpose

**Miva Synchro** provides a mechanism for synchronizing data between Miva Merchant and third party applications quickly and efficiently. At this time, QuickBooks is the only third party application supported. This document describes how to synchronize a Miva Merchant storefront with the corresponding QuickBooks company data. Miva Synchro and QuickBooks must already be installed and the Miva Merchant store must exist. The Miva Synchro Connector module must be installed in Miva Merchant. For more detailed information regarding Miva Synchro, refer to the *Miva Synchro User's Guide*. For details on setting up a Miva Merchant store, refer to the *Miva Merchant User Reference Guide*.

**Note:** This guide is intended to demonstrate a basic setup for Miva Synchro with QuickBooks. To enable different options than those chosen in the following pages, refer to the *Miva Synchro User's Guide*.

## System Requirements

Miva Synchro requires the following:

- Microsoft Windows
- QuickBooks
- Miva Merchant

**Note:** The minimum version requirements are subject to change. Refer to Miva's <u>support page</u> for the latest information regarding version requirements.

## **Getting Started**

## Getting Started

**Note:** QuickBooks and Miva Synchro should be installed before you proceed. You must also have a Miva Merchant store in place with the Miva Synchro Connector module installed. For details regarding Miva Merchant store setup and adding modules, refer to the *Miva Merchant User Reference Guide*.

1. Launch QuickBooks and open the desired company file.

¢	Intuit C	uickBooks Enterprise Solutions	15.0	- 🗆 ×
<u>F</u> ile <u>E</u> dit ∖	iew <u>L</u> ists Favorites <u>C</u> ompany C <u>u</u> s	tomers Vend <u>o</u> rs Employees <u>B</u>	anking <u>R</u> eports <u>W</u> indow	<u>H</u> elp
	No Company Op Select a company that you've previou	DCN Isly opened and click Open		
	COMPANY NAME	LAST MODIFIED	FILE SIZE	0
	MivaSynchroBase.OBW	U3/15/2016, 04:01 PM	12.06 MB	Edit List
	Create a new company Open or rest	ore an Open a sample file		

#### Figure 1-1: Intuit QuickBooks

2. Start Miva Synchro. The Miva Synchro main screen appears.

🥑 Miva Synchro		×
Last Sync Store	QuickBooks File	<u>C</u> lose E <u>x</u> it
		Settings
		Add Store
		Delete Store
		<u>P</u> roperties
		Synchronize
QuickBooks	Miva Merchant Orders d Updated Added Updated New Orders: 0	<u>R</u> eset
Products: 0	0 Products: 0 0 Total: 0.00	
Customers: 0	0 Customers: 0 0	
Last Product: n/a Last Customer: n/a Last Order n/a		

Figure 1-2: Miva Synchro main screen

# Adding a Store to Miva Synchro

1. Click Add Store. The Add Store Wizard launches.

Add Store Wizard		$\times$
Ø	Welcome to the Miva Synchro Add Store Wizard.	
	This wizard will assist you in configuring synchronization for your Miva Merchant storefront.	
	Before beginning, please launch QuickBooks and open the QuickBooks company file you intend to synchronize with Miva Merchant. Press Next to begin.	
	< Back Next > Finish Cancel	

Figure 1-3: Add Store Wizard start screen

## 2. Click Next.

Add Store Wizard	~
	^
Please enter the full pathname of the QuickBooks Company File you wish to use for synchronization below.	
You will need to have QuickBooks running with the company file open before continuing.	
QuickBooks Company File: C:\Users\Public\Documents\Intuit\QuickBooks\ Browse	
< Back Next > Finish Canc	el

Figure 1-4: Add Store Wizard dialog 2

3. Enter the full path to the QuickBooks Company File or browse to it by clicking Browse.

### Adding a Store to Miva Synchro

**Note:** If QuickBooks displays a dialog entitled **QuickBooks – Application Certificate**, in response to the question "Do you want to allow this application to read and modify this company file?" select "Yes, always; allow access even if QuickBooks is not running". Other selections may alter the specific dialogs and prompts that are displayed throughout the remainder of this guide.

#### 4. Click Next.

Add Store Wiz	ard	×
Please enter a user with / your Miva M	r the complete URL to your Miva Merchant administration, and the login/password of Administrator access. Miva Synchro will use this information to communicate with lerchant storefront.	
URL:	http://dts2414.mivamerchantdev.com/mm5/admin.mvc	
L <u>og</u> in:	miva	
Password:	•••••	
	< Back Next > Finish Cancel	

### Figure 1-5: Add Store Wizard dialog 3

- **5.** Enter the complete URL to the administration page of your Miva Merchant store in the URL box.
- 6. Enter the Login and Password for the administration page.
- 7. Click Next.

Add Store Wizard		:
Please select the	Miva Merchant Storefront you wish to synchronize:	
	Store 1	

Figure 1-6: Add Store Wizard dialog 4

- 8. Select the Miva Merchant Storefront you wish to synchronize with.
- 9. Click Next.

Add Store Wizard	×
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	
< <u>B</u> ack <u>N</u> ext > Finish Cancel	

Figure 1-7: Add Store Wizard dialog 5

### Adding a Store to Miva Synchro

- **10.** Check all three boxes:
  - Download Orders From Miva Merchant
  - Synchronize Product Information
  - Synchronize Customer Account Information

### 11. Click Next.

Add Store Wizard	×
Downloaded orders can be created in QuickBooks as Sales Receipts, Invoices, or Sales Orders. 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: Sales Orders ✓ Invoices Sales Receipts Sales Orders	
< <u>B</u> ack <u>N</u> ext > Finish Cancel	

#### Figure 1-8: Add Store Wizard dialog 6

#### 12. Select to Record Orders As Sales Orders.

### 13. Click Next.



*Figure 1-9:* Add Store Wizard – Ready to configure **14.** Click **Finish**.

# Configuring Miva Synchro

After completing the steps in the previous sections, you need to configure Miva Synchro settings for products, customers and orders before performing a synchronization.

🧿 Miva Syn	chro								×
Last Sync	Store	QuickBo	oks File						<u>C</u> lose
Never	Store	1 C:\Users	s\Public\Docu	ments\Ini	tuit\QuickBo	oks\Company Fi	les\Miva	aSynchroBa	E <u>x</u> it
									<u>S</u> ettings
									Add Store
									Delete Store
									<u>P</u> roperties
									Synchronize
<								>	
QuickBook	s Added	Updated	- Miva Mercł	hant Added	Updated	Orders New Orders:	0		<u>R</u> eset
Products:	0	0	Products:	0	0	Total:	0.00		
Customers:	0	0	Customers:	0	0				
Last Product Last Custome Last Order	: n/a er: n/a n/a								

Figure 1-10: Miva Synchro with store selected

- 1. Select the store name from the list box. Note the buttons on the right that were grayed out are now available.
- 2. Click Properties.

## **Configuring Miva Synchro**

Miscel	llaneous			ОК	
N <u>a</u> me:		Store 1		Cancel	
Synchronization Log:			<u>B</u> rowse	Products	
<u>L</u> icens	e #:	testv-JT0D2DBGEBG			
Quickl	Books			Orders	
File: C:\Users\Public\Documents\Intuit\QuickBooks\Com			Bro <u>w</u> se	Fields	
URL: Store I Login:	Code: store miva	//dts2414.mivamerchantdev.com/mm5/admin 1 Pa <u>s</u> sword: ace Store in Maintenance Mode During Synch	n.mvc		
Synch Ma	ronization <u>n</u> ual comatically sy	nchronize every 12 Hourfs)			

Figure 1-11: Miva Synchro Properties dialog

**3.** To create a synchronization log, enter the full path to the log file in the **Synchronization Log** input field. Alternately, you can click the **Browse** button to navigate to the folder in which you want to place the log file.

Properties			×
Miscellaneous N <u>a</u> me: Synchronization Log:	Store 1 C:\synchro.log	Browse	OK Cancel Produc <u>t</u> s
<u>L</u> icense #:	testv-JT0D2DBGEBG		<u>C</u> ustomers
QuickBooks			Ord <u>e</u> rs
<u>F</u> ile: C:\Users\Pu	blic\Documents\Intuit\QuickBooks\Com	Bro <u>w</u> se	Fiel <u>d</u> s
Miva Merchant <u>U</u> RL: http://d Store Code: store1 Login: mival Plac	dts2414.mivamerchantdev.com/mm5/admin Pagsword: ●●●●● e Store in Maintenance Mode During Sync	n.mvc	
Synchronization Manual Automatically synce	hronize every 12 Hour(s) V		

Figure 1-12: Properties with Synchronization Log.

## **Product Properties**

4. From the Properties dialog, click Products.

Properties: Products					×
Synchronization Setti	ngs ucts Created in <u>M</u> iva Merchant ucts Created in <u>Q</u> uickBooks	Eull Product Si Recreate Prev	can at Next Synchronization riously Deleted Products Non-Inventory Items		OK Cancel
Conflict <u>R</u> esolution:	Miva Merchant Overwrites Quic	:kBooks 🗸			
Sync <u>D</u> irection:	Miva Merchant -> QuickBooks	$\sim$			
Selective Synchroniz	ation Custom Field: <none></none>	$\sim$			
Assign New Products	s to the Following:	Accounts			
Price Groups:		<u>C</u> OGS:	Cost of Goods Sold	$\sim$	
		A <u>s</u> set:	<none></none>	$\sim$	
Availability Groups:		Income:	Other Income	$\sim$	
		<u>E</u> xpense:		$\sim$	
Tax Codes					
Ta <u>x</u> able: Tax	$\sim$				
N <u>o</u> n Taxable: Non	~				

Figure 1-13: Properties: Products dialog

5. Match the settings shown in *Figure 1-13*:

### Synchronization Settings

- Synchronize Products Created in Miva Merchant
- Full Product Scan at Next Synchronization
- Conflict Resolution: Miva Merchant Overwrites QuickBooks
- Sync Direction: Miva Merchant -> QuickBooks

#### Accounts

- COGS: Cost of Goods Sold
- Asset:: <none>
- Income: Other Income

**Note:** The **COGS** account must be of the type "Cost of Goods Sold" and the **Income** account must be of the type "Other Income". These accounts will be found in the chart of the accounts in QuickBooks.

## Configuring Miva Synchro *Customer Properties*

## Tax Codes

- Taxable: **Tax**
- Non Taxable: Non
- 6. Click OK.

## **Customer Properties**

7. From the Properties dialog (*Figure 1-12:*) click Customers.

Properties: Customers	5	×
Synchronization Sett	ings omers Created in <u>M</u> iva Merchant omers Created in <u>Q</u> uickBooks	OK Cancel
Conflict Resolution:	Miva Merchant Overwrites QuickBooks $ \smallsetminus $	
Sync Direction:	Miva Merchant -> QuickBooks 🛛 🗸	
Eull Customer Sca	an at Next Synchronization Isly <u>D</u> eleted Customers	
Assign New Custom	ers to The Following Miva Merchant	
Price Groups:		
A⊻ailability Groups:		
Majling Lists:		

Figure 1-14: Properties: Customers dialog

8. Match the settings shown in *Figure 1-14*:

## Synchronization Settings

- Synchronize Customers Created in Miva Merchant
- Conflict Resolution: Miva Merchant Overwrites QuickBooks
- Sync Direction: Miva Merchant -> QuickBooks
- Full Customer Scan at Next Synchronization
- 9. Click OK.

## **Order Properties**

10. From the Properties dialog (*Figure 1-12:*) click Orders.

Pro	operties: Orders			×
	Synchronization Settings Synchronize Orders Created in Detect out of Seguence Orders Last Order #: 0	Miva Merchant s		OK Cancel
	Order Mapping			
	Payment Method	Record Type	Account	
	<default></default>	Sales Order	n/a	Sales Receipts
	Miva Merchant <u>P</u> ayment Method: <default> </default>	QuickBooks <u>B</u> ecord Type: Sales Order ~	Deposit or AR Account:	Qelete

Figure 1-15: Properties: Orders dialog

11. Match the synchronization settings shown in *Figure 1-15:* 

### Synchronization Settings

- Synchronize Orders Created in Miva Merchant
- Detect out of Sequence Orders

#### 12. Select **< Default>** as the **Miva Merchant Payment Method**.

13. Select how you want to treat Miva Merchant orders in QuickBooks.

- a. Under QuickBooks Record Type, select one of the following options:
  - Invoice In QuickBooks, Invoices are used to record the sale for which payment is expected at a later date. In Miva Synchro, if you choose to record orders as invoices, you must assign it to a QuickBooks account of type "Accounts Receivable".
  - Sales Receipt In QuickBooks, Sales Receipts are used to record the sale and the
    payment in one transaction. If you choose to record orders as Sales Receipts, you must
    assign it to a QuickBooks account of type "Bank" or "Other Current Asset".
  - Sales Order In QuickBooks, Sales Orders are created for orders that have not yet been shipped. When recording Miva Merchant orders to QuickBook Sales Orders, there is no requirement to assign them to a QuickBooks account.
- b. If an appropriate QuickBooks account type does not exist, click Cancel in Miva Synchro, create an appropriate account in QuickBooks, then click Orders again from the Properties dialog (*Figure 1-12:*) in Miva Synchro to continue.

## Configuring Miva Synchro *Order Properties*

**Note:** Refer to the QuickBooks documentation for detailed information on QuickBooks Record Types.

14. After you have chosen a QuickBooks Record Type, select the corresponding button on the right side of the **Properties: Orders** dialog (*Figure 1-15:*).

**Note:** You only need to configure the order type (**Invoices**, **Sales Receipts** or **Sales Orders**) that you are using in QuickBooks.

For this example, we will choose Invoice.

## **Invoice Settings**

15. From the Properties: Orders dialog (Figure 1-15:), click Invoices.

Properties: Orders: Inv	voice Settings			×
Settings Order <u>#</u> Prefix:	mm-			OK Cancel
Sales Rep:	<none> ~</none>			
Customer:	<from order=""> <math>\sim</math></from>			
Terms		Shipping		
○ <u>N</u> one		On't set Sh	ipping Method	
Create/Use Miva	Merchant Payment Method	O Create/Use	Miva Merchant Shipping Method	
○ U <u>s</u> e Fixed:	$\sim$	⊖Use Fixe <u>d</u> :	~	
Sales Tax		Line Items		
Allow QuickBooks	s to Apply/Recalculate	Create Line	Item for Shipping Charges	
Create Invoi <u>c</u> e L	ine Item	Create Line	Item for Other/Coupon Charges:	
Line Tax Item:	mm-tax-item 🗸 🗸	Shipping Item:	mm-shipping ~	
Invoice Tax	mm-tax-invoice $\lor$	<u>O</u> ther	mm-other $\sim$	

Figure 1-16: Properties: Orders: Invoice Settings dialog

**16.** Match the settings shown in *Figure 1-16*:.

## Synchronizing Miva Merchant and QuickBooks

Once you have completed the previous sections, Miva Synchro has the basic information necessary to synchronize QuickBooks and Miva Merchant.

1. From the main Miva Synchro dialog (*Figure 1-10:*), click Synchronize.

Ø Miva Synchro	×
Synchronization Progress X	<u>C</u> lose
Synchronizing orders: 5 of 7 hy Files\MivaSynchroBase.QBV	E <u>x</u> it
	<u>S</u> ettings
Cancel	Add Store
	Delete Store
	<u>P</u> roperties
	Synchronize
8	
QuickBooks Miva Merchant Orders Added Updated Added Updated New Orders: 4	<u>R</u> eset
Products: 2 0 Products: 0 0 Total: 2620.00	
Customers: 3 0 Customers: 0 0	
Last Product: product 1 Last Customer: Alfred Newman	

Figure 1-17: Synchronizing Orders in Miva Synchro

A **Synchronization Progress** bar appears showing the progress of the synchronization of data between QuickBooks and Miva Merchant.

## QuickBooks Configuration

The Add Store Wizard (see *Adding a Store to Miva Synchro* on page 5) adds the mm-shipping and mm-tax-xxx items to QuickBooks. These two items must be configured within QuickBooks. The two items that must be present are:

• mm-shipping – used for delivery charges, setup fees, service charges, etc.

and

• mm-tax-item - used to calculate sales tax on a line item basis

or

- mm-tax-invoice used to calculate sales tax on the entire order
- 1. To view the Item List, launch QuickBooks and select Lists > Item List from the menu bar.

0	Miva	Synchro Base Test Company - Intuit	QuickBooks Enterpris	se Solutions 15.0 - [Item	List]	- - ×
E	<u>E</u> ile <u>E</u> dit <u>V</u> iew <u>L</u> ists Fav	vorites <u>C</u> ompany C <u>u</u> stomers Vend	l <u>o</u> rs Employees <u>B</u> ar	king <u>R</u> eports <u>W</u> indow	Help 🔞	_ <i>8</i> ×
>	Loo <u>k</u> for	i <u>n</u> All fields	<ul> <li>Search</li> </ul>	Re <u>s</u> et Se	arch within results	
ρ	NAME	DESCRIPTION	TYPE	ACCOUNT	ON SALES ORDER	RICE ATTACH
	• p1	p1 name	Non-inventory Part	Sales		2.00
	♦ prod1	product 1	Non-inventory Part	Other Income		10.00
30	vups_rates	UPS Rate Test Product	Non-inventory Part	Sales		1.00
-	♦ mm-other	Miscellaneous	Other Charge	Sales		0.00
Dol	• mm-shipping	Shipping	Other Charge	Sales		0.00
•	mm-tax-invoice	Sales Tax	Sales Tax Item	Sales Tax Payable		0.0%
	• mm-tax-item	Sales Tax	Sales Tax Item	Sales Tax Payable		0.0%
	out of State	Out-of-state sale, exempt from sale	Sales Tax Item	Sales Tax Payable		0.0%
+	San Diego Sales Tax	San Diego Sales Tax	Sales Tax Item	Sales Tax Payable		8.0%
\$	S Item V Activities V Reports V Excel V Attach Include inactive					

Figure 1-18: QuickBooks Item List

**Note:** Although *Figure 1-18:* shows both mm-tax-invoice and mm-tax-item, you only need one or the other.

## **Configuring mm-shipping**

a. Select Edit > New Item.

I	New Item	– 🗆 ×
Other Charge	<ul> <li>Use for miscellaneous labor, material, or part charges, such as delivery charges, setup fees, and service charges.</li> </ul>	OK Cancel
Item Name/Number mm-shipping This item is used in	Subitem of	No <u>t</u> es Custom Fields
Description	Amount or % Ta <u>x</u> Code 0.00 Tax ▼ Account Postage and Delivery ▼	Spelling
		Item is inactive

Figure 1-19: New Item - mm-shipping

**b.** Configure **mm-shipping** as shown in *Figure 1-19*:.

## Configuring mm-tax-item

a. Select Edit > New Item.

	New Item	- 🗆 ×
TYPE Sales Tax Item	<ul> <li>Use to calculate a single sales tax at a specific rate that you pay to a single tax agency.</li> </ul>	OK Cancel
Sales Tax Name mm-tax-item		<u>N</u> ext No <u>t</u> es
Description		Spelling
Sales Tax		Item is inactive
Tax Rate (%)	Tax Agency (vendor that you collect for)           Dity of San Diego	

Figure 1-20: New Item - mm-tax-item

**b.** Configure **mm-tax-item** as shown in *Figure 1-20*:.

Note: You must specify a tax agency for state sales tax.

## Configuring mm-tax-invoice

a. Select Edit > New Item.

	New Item	- 0 -
TYPE	Use to calculate a single sales tax at a specific rate	ОК
Sales laxitem	that you pay to a single tax agency.	Cancel
Salaa Tax Nama		Next
mm-tax-invoice		No <u>t</u> es
Description		Spellin <u>a</u>
Sales Tax		Item is inactive
Tax Rate (%)	Tax Agency (vendor that you collect for)	
0.0%	City of San Diego 🔹	

Figure 1-21: New Item - mm-tax-invoice

**b.** Configure **mm-tax-invoice** as shown in *Figure 1-21:* 

**Note:** You must specify a tax agency for state sales tax.