



Miva Synchro
Quick Start Guide

Miva Synchro v1.75

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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 [support page](#) 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.

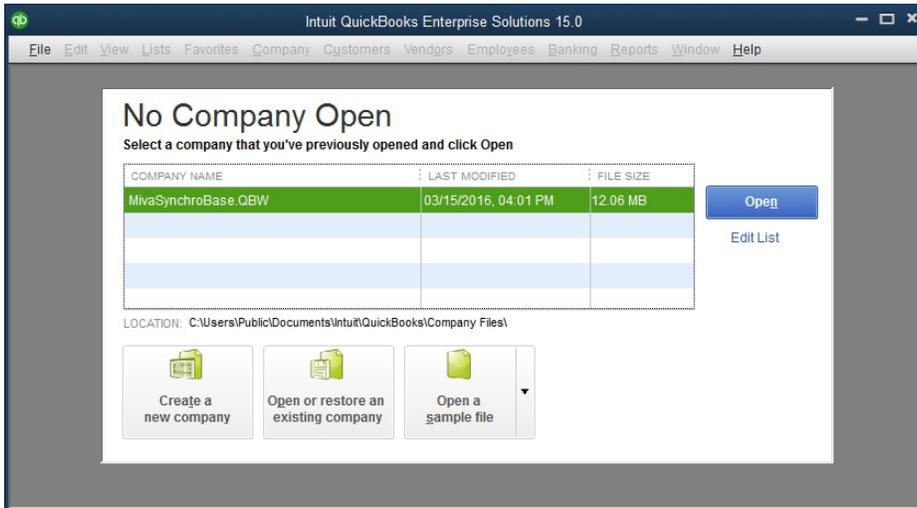


Figure 1-1: Intuit QuickBooks

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

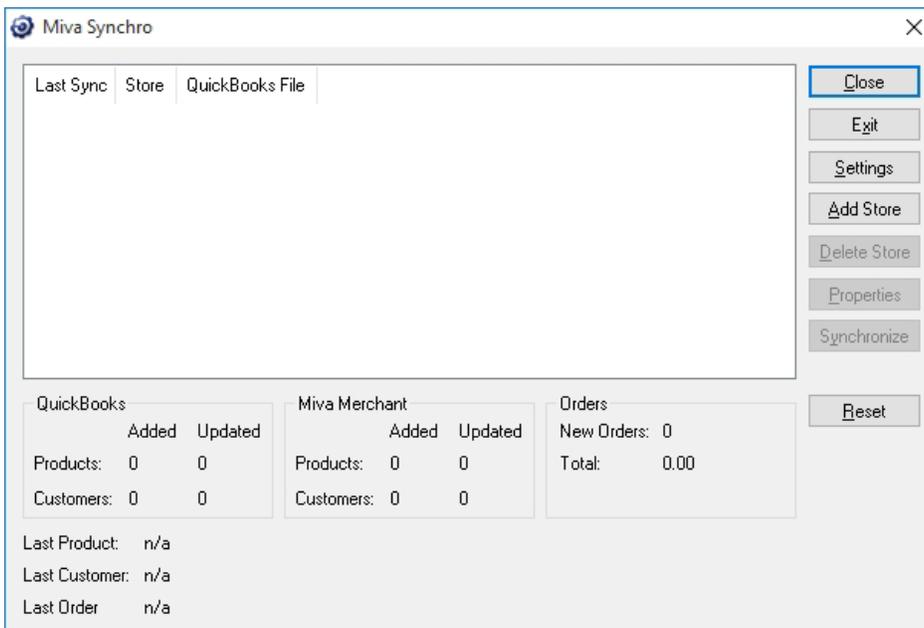


Figure 1-2: Miva Synchro main screen

Adding a Store to Miva Synchro

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



Figure 1-3: Add Store Wizard start screen

2. Click **Next**.

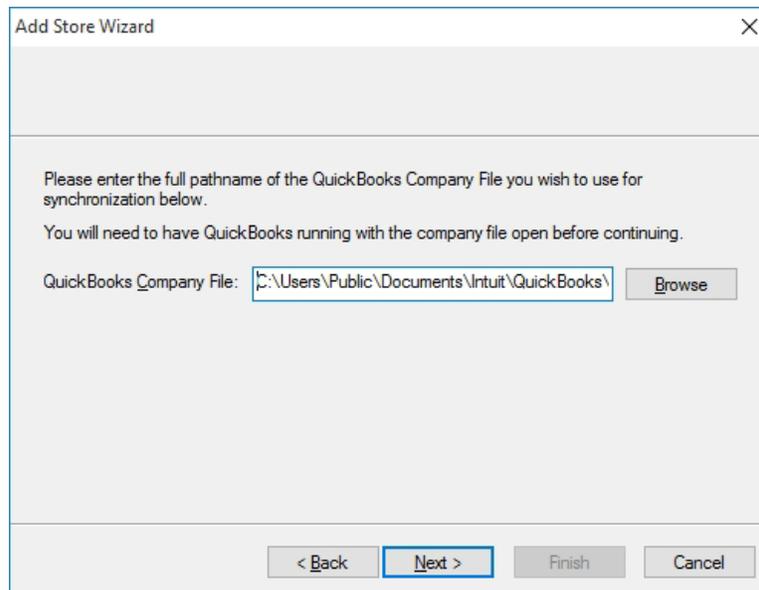


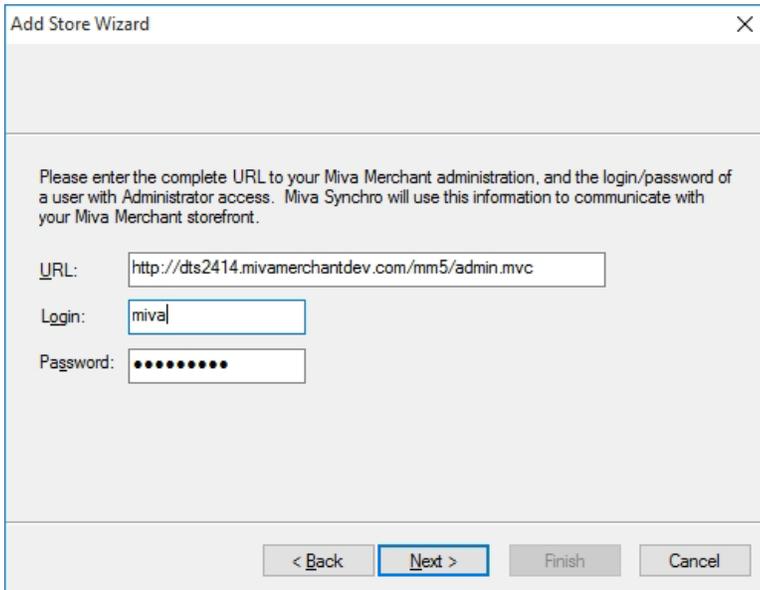
Figure 1-4: Add Store Wizard dialog 2

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 Wizard

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

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**.

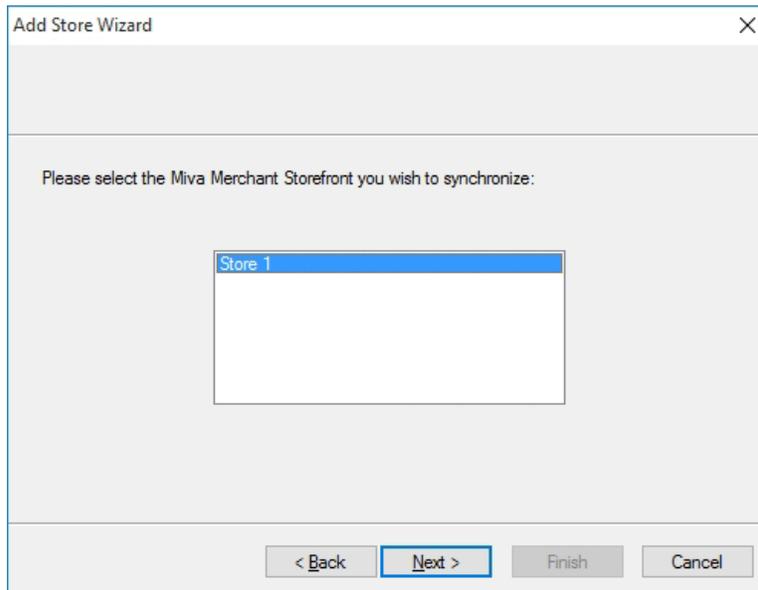


Figure 1-6: Add Store Wizard dialog 4

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

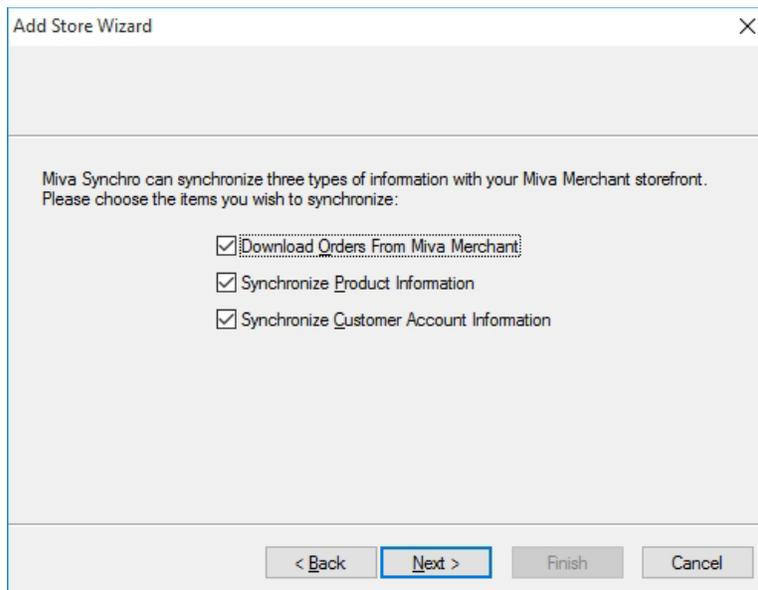


Figure 1-7: Add Store Wizard dialog 5

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.

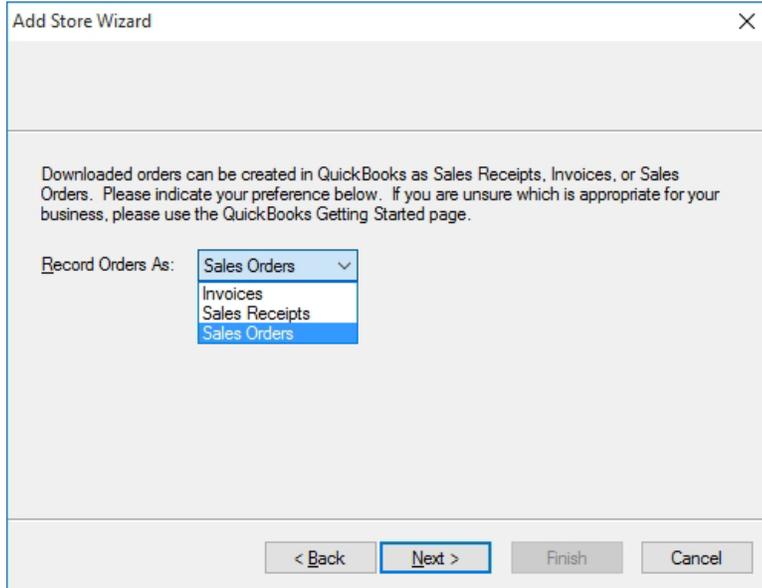


Figure 1-8: Add Store Wizard dialog 6

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

13. Click Next.

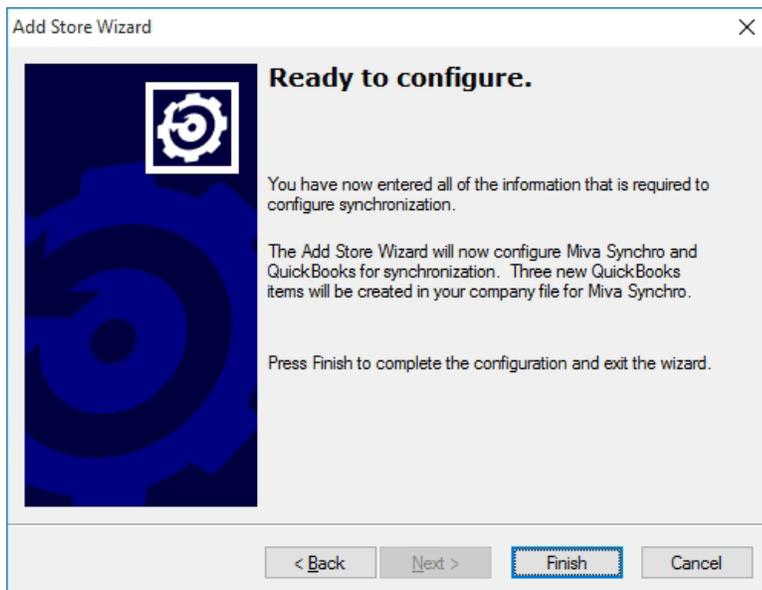


Figure 1-9: Add Store Wizard – Ready to configure

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.

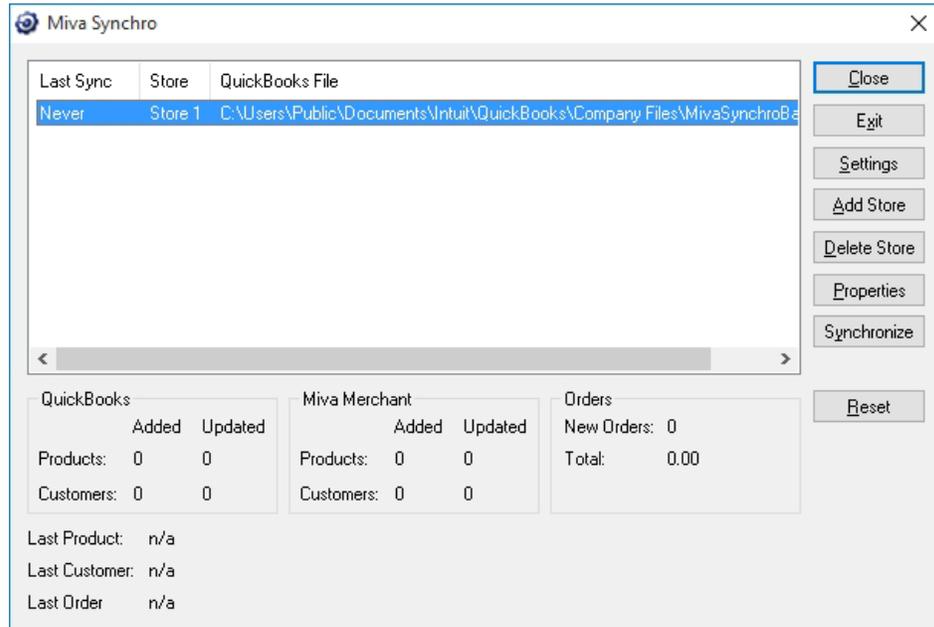


Figure 1-10: Miva Synchro with store selected

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

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

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

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

Figure 1-12: Properties with Synchronization Log.

Product Properties

4. From the **Properties** dialog, click **Products**.

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**.

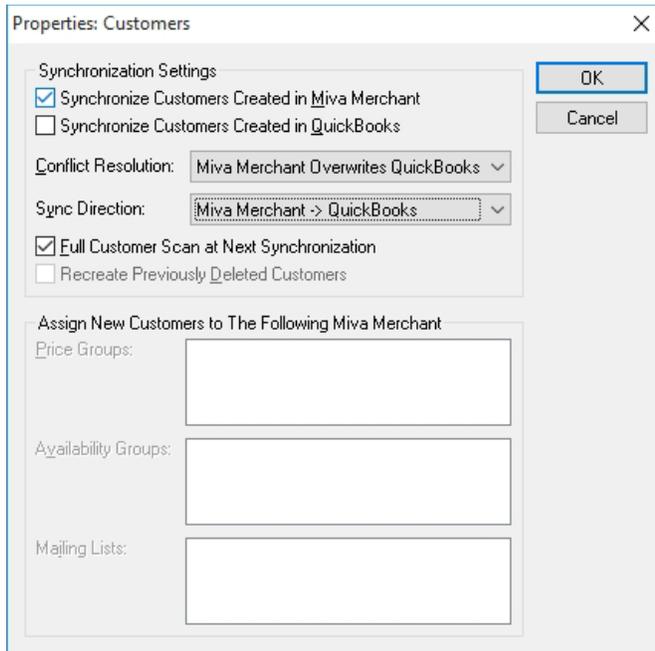


Figure 1-14: Properties: Customers dialog

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**.

Properties: Orders

Synchronization Settings

Synchronize Orders Created in Miva Merchant

Detect out of Sequence Orders

Last Order #:

Order Mapping

Payment Method	Record Type	Account
<Default>	Sales Order	n/a

Miva Merchant Payment Method: QuickBooks Record Type: Deposit or AR Account:

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**.

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**.

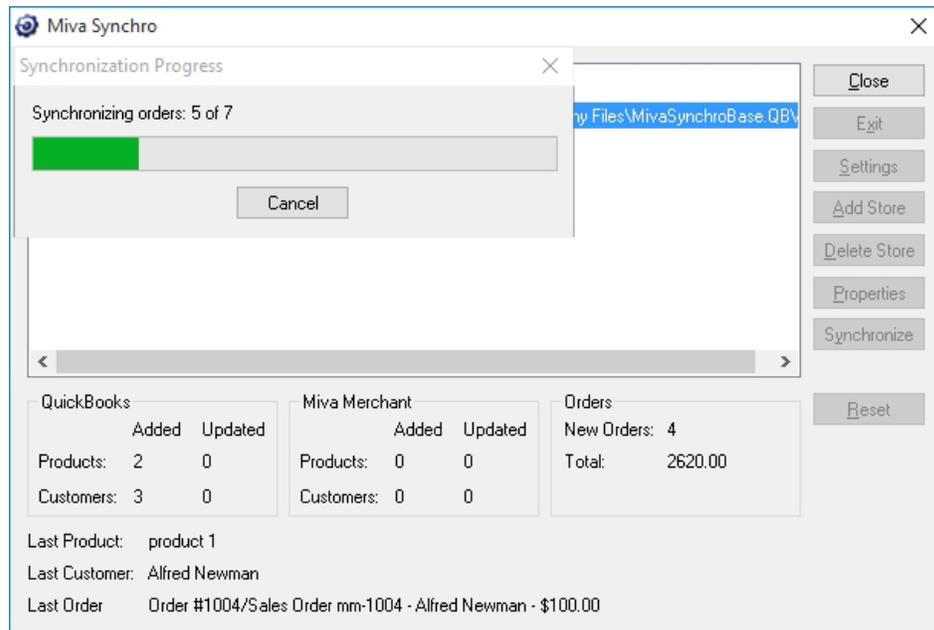


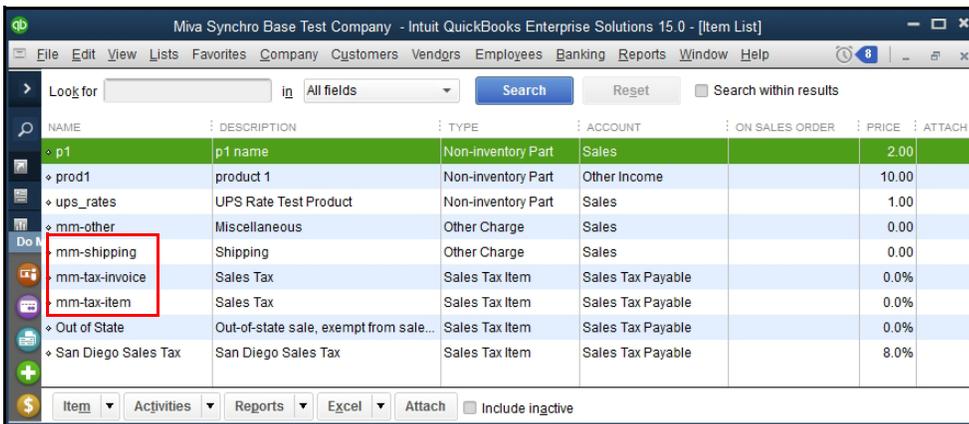
Figure 1-17: Synchronizing Orders in Miva Synchro

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.



The screenshot shows the QuickBooks Item List interface. The table below represents the data shown in the screenshot:

NAME	DESCRIPTION	TYPE	ACCOUNT	ON SALES ORDER	PRICE	ATTACH
p1	p1 name	Non-inventory Part	Sales		2.00	
prod1	product 1	Non-inventory Part	Other Income		10.00	
ups_rates	UPS Rate Test Product	Non-inventory Part	Sales		1.00	
mm-other	Miscellaneous	Other Charge	Sales		0.00	
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%	

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**.

The screenshot shows the 'New Item' dialog box with the following configuration:

- TYPE:** Other Charge (Use for miscellaneous labor, material, or part charges, such as delivery charges, setup fees, and service charges.)
- Item Name/Number:** mm-shipping
- Subitem of:** (empty)
- This item is used in assemblies or is a reimbursable charge:** (unchecked)
- Description:** (empty)
- Amount or %:** 0.00
- Tax Code:** Tax
- Account:** Postage and Delivery
- Item is inactive:** (unchecked)

Buttons on the right: OK, Cancel, Next, Notes, Custom Fields, Spelling.

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**.

The screenshot shows the 'New Item' dialog box with the following configuration:

- TYPE:** Sales Tax Item (Use to calculate a single sales tax at a specific rate that you pay to a single tax agency.)
- Sales Tax Name:** mm-tax-item
- Description:** Sales Tax
- Tax Rate (%):** 0.0%
- Tax Agency (vendor that you collect for):** City of San Diego
- Item is inactive:** (unchecked)

Buttons on the right: OK, Cancel, Next, Notes, Spelling.

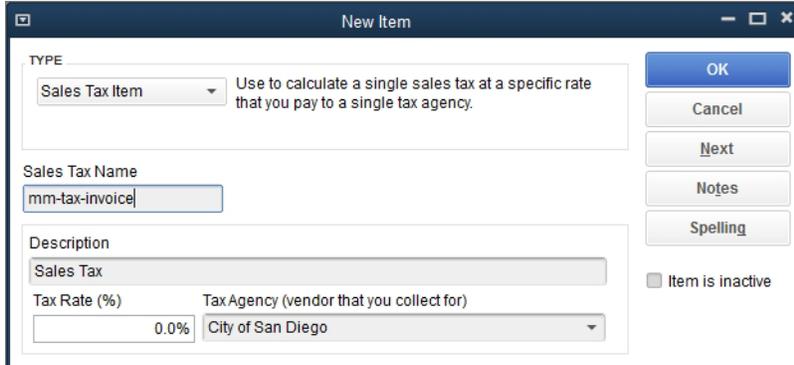
Figure 1-20: New Item – mm-tax-item

- 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**.



The screenshot shows a 'New Item' dialog box with the following fields and values:

- TYPE:** Sales Tax Item (dropdown menu)
- Sales Tax Name:** mm-tax-invoice (text input)
- Description:** Sales Tax (text input)
- Tax Rate (%):** 0.0% (text input)
- Tax Agency (vendor that you collect for):** City of San Diego (dropdown menu)
- Item is inactive:** (checkbox)
- Buttons:** OK, Cancel, Next, Notes, Spelling

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.
