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3dcart Shopping Cart Software

3dcart/QuickBooks Plugin



Introduction

The 3dcart/QuickBooks Plugin acts as a bridging utility between your 3dcart store and your QuickBooks Accounting Software and allows you to easily.

- Import your 3dcart products into QuickBooks
- Easily download your inventory into QuickBooks
- Quickly create Invoices/Sales Receipts from your Web orders
- Synchronize Customer Data

The software is composed of 2 parts.

- A. Desktop Application
- B. Server Component

The server component is added by 3dcart's team upon ordering of the QuickBooks plugin. If you have not yet received confirmation from 3dcart that the server component has been enabled on your site, please contact support to have this done.

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3dcart/QuickBooks Plugin



System Requirements

The following system requirements are necessary in order to use the 3dcart/QuickBooks plugin.

Client(s)

- **Processor:** Pentium® or better
- **Operating System:** Windows® 2000, XP, 7, or higher
- **RAM:** 256Mb
- **Monitor:** minimum 800x600 Resolution display

Software:

- QuickBooks 2003 or higher (PC Only)

Note: Mac and Web-Based versions of QuickBooks are not supported. Please click [here](#) for more compatibility considerations.

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First Steps: Configuring QuickBooks Items

Before you can start using the QuickBooks Plug-in, you will first need to create a few products in your QuickBooks Database to handle Shipping and Discount charges.

Begin by opening QuickBooks and selecting your QuickBooks Company file. Then create the following items:

- **Shipping Cost** - list its type as "Other charges"
- **Order Discount** - list its type as "Discount"
- **Tax Charge** – *(Optional)* list its type as "Tax"

For help on creating items in QuickBooks refer to your QuickBooks help documentation.

Before proceeding

This documentation assumes that you have your QuickBooks program set up with your company file and accounting information already in place as well as familiarity with the QuickBooks Accounting program.

3dcart support can only assist with the setting up of the 3dcart/QuickBooks plugin that we offer. Support is **not** able to assist with the setting up of your QuickBooks program itself. For help with configuring and navigating within QuickBooks, please contact Intuit, the makers of QuickBooks.

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Part I - Installing the 3dcart/QuickBooks plugin

Download the 3dcart/QuickBooks plugin setup application by clicking [here](#).

You will need to have an un-zipping utility to uncompress the file. Most installations of Windows have a zip utility built-in. However if you do not have one, you may download a freeware version of WinZip by clicking [here](#).

Once you have finished downloading the file, unzip it and run setup.exe. Follow the on-screen instructions to complete the installation.

Part II - Configuring the Plugin

In order to communicate with your 3dcart site, you will need to set up a login/password combination that the QuickBooks plugin will use to connect to your store. To configure this login/password, log into your 3dcart Online Store Manager and follow these steps.

1. Go to **Plugins =>Order Management**
2. Locate the listing for the 3dcart QuickBooks plugin
3. Click "Settings"
4. Enter a Username and a Password in the provided fields
5. Click "Save Changes" at the top.



Special Note: When creating login and password for your QuickBooks plugin, please be sure to avoid special characters (i.e. !@#\$%^&*()-_+=?) in either item since these will not work well with QuickBooks and our plugin.

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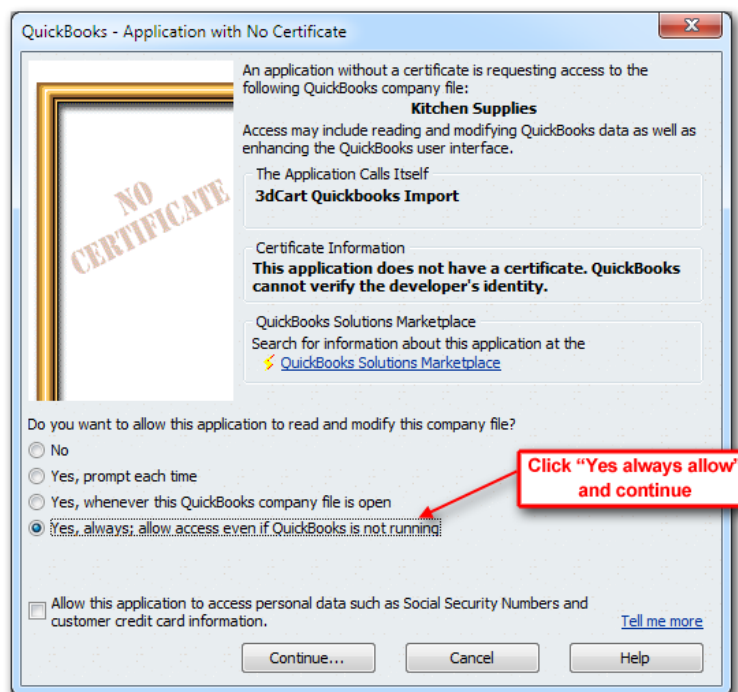
3dcart/QuickBooks Plugin



Let's begin:

1. Open your QuickBooks Company File
2. Open the 3dcart/QuickBooks plugin

If this is your first time opening up the 3dcart/QuickBooks plugin, a special pop-up warning will appear notifying you that an application without a certificate is requesting access to your company file. This is a necessary permission required in order to use the plugin, so you should select "Yes, always; allow access" as shown.



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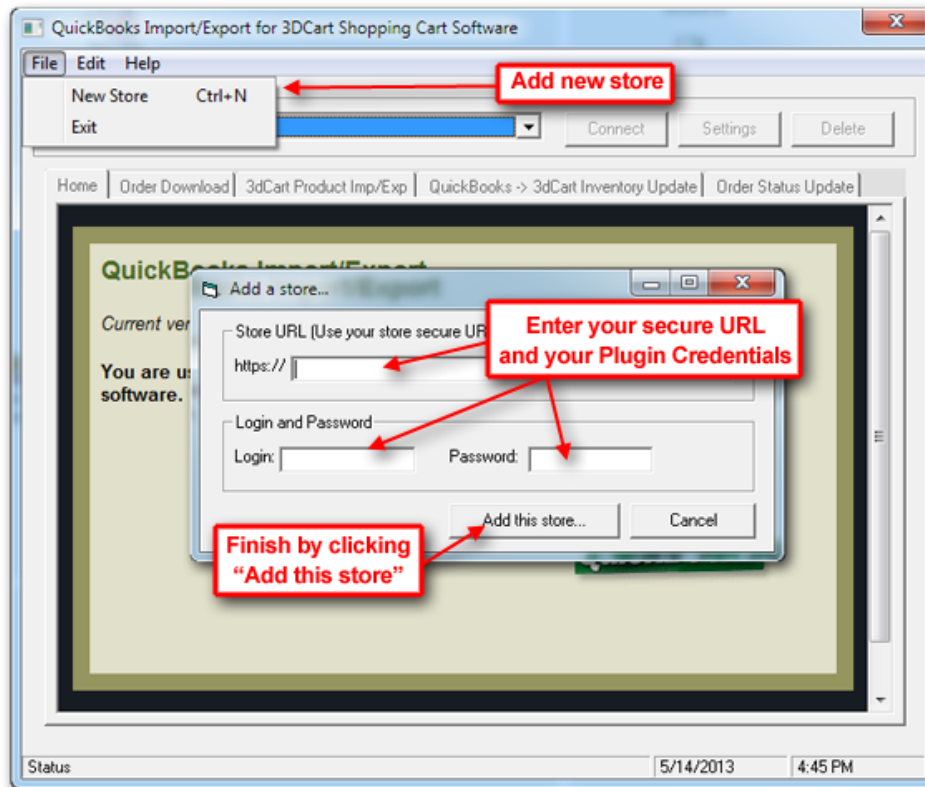
3dcart/QuickBooks Plugin



After allowing access, QuickBooks will prompt you a few more times for confirmation.

Once the 3dcart/QuickBooks plugin application is open, continue with the following:

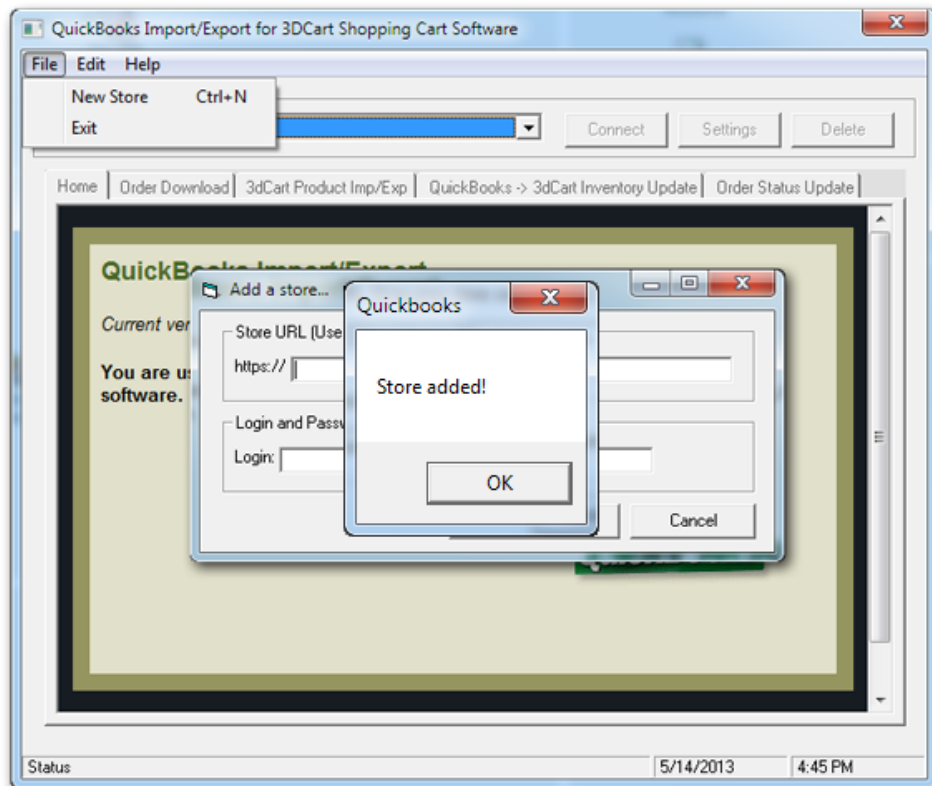
3. Within the application, go to **File => New Store**
4. Enter your store's **secure** URL
5. Enter the Username and Password specified in your Online Store Manager.



The software will attempt to connect and validate the entered data. If the data you entered is correct, the store will be added successfully.

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Once the store is configured, continue with the following:

6. Select the store from the drop down list then click "Settings"
7. Edit your settings as needed.
8. Click Save when complete.

The screenshot shows a 'Settings' window with the following fields and options:

- 3dCart Store URL:** (https://www.yourdomain.com) - Input field containing 'yoursecureURL.com'
- Username:** Input field containing 'quickbooks'
- Password:** Input field containing 'XXXXXXXXXXXX'
- Importing Products:**
 - COGS Account:** Dropdown menu with 'Merchant Account Fees' selected
 - Income Account:** Dropdown menu with 'Merchandise Sales' selected
 - Asset Account:** Dropdown menu with 'Security Deposits Asset' selected
- Import as:** Dropdown menu with 'Sales Receipt' selected
- File Customer info as:** Dropdown menu with 'Lastname, First Name' selected
- Invoice Settings:**
 - Prefix:** Input field
 - Suffix:** Input field
- Shipping Charges Product:** Dropdown menu with 'Shipping Cost' selected
- Discounts Product:** Dropdown menu with 'Order Discount' selected
- Tax Item:** Dropdown menu with 'State Tax' selected
- Save** button

Below is a reference of the attributes available for the settings screen:

- a. **URL** - This should be your store's Secure URL.
- b. **Username/Password** - This will be the login parameters configured earlier in this article.
- c. **Importing Products**
 - **COGS** - The Cost of Goods Sold account configured in your QuickBooks program
 - **Income Account** - The Income account configured in your QuickBooks program
 - **Asset Account** - The Assets account configured in your QuickBooks program
- d. **Import As:** - Specify whether you'd like the orders imported as Invoices or Sales Receipts
- e. **File Customer info as:** - Specify the customer name format you'd like to use. (Lastname, Firstname or Firstname Lastname.)
- f. **Invoice Settings**
 - **Prefix:** add a custom prefix to your invoices for QuickBooks to use (Imported orders do not contain your 3dcart invoice prefix; only the number sequence)
 - **Suffix:** add a custom suffix to the end of your invoices for QuickBooks to use.
- g. **Shipping Charges Product** - Select the name of your previously created "Shipping Cost" item
- h. **Discount Product** - Select the name of your previously created "Order Discount" item
- i. **Tax Item** - If your QuickBooks Company file was set to collect tax, that item will appear here.

You may now click "Connect" to connect the application to your 3dcart store.

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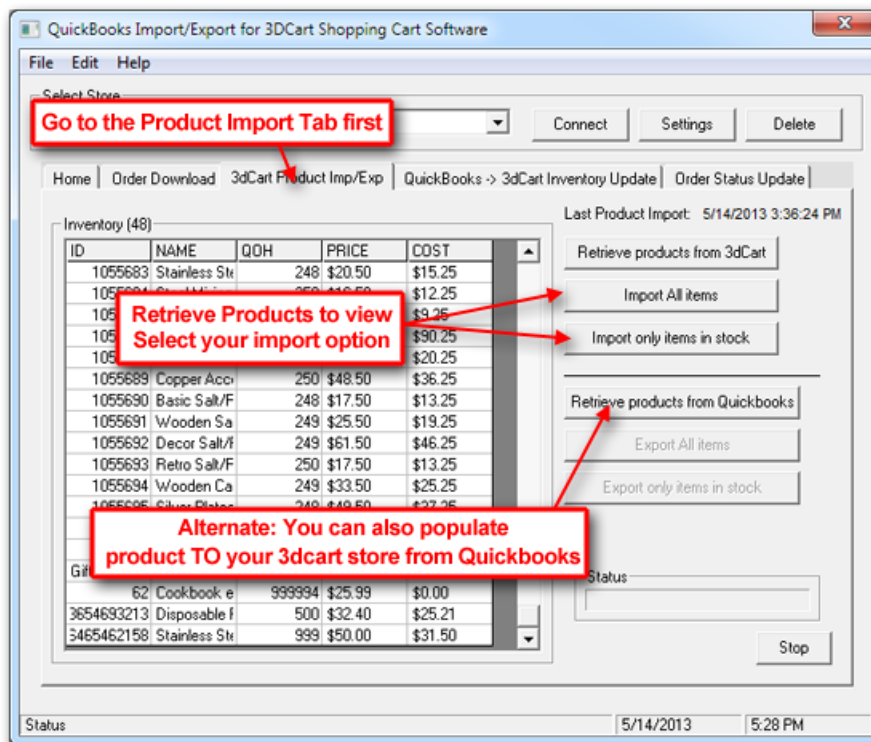


Part III - Product Importing

Before you can import your 3dcart Orders into QuickBooks, your products must first be created on the QuickBooks Company File. Therefore, your first import should be a product import.

At the top of the 3dcart/QuickBooks Plugin application, you will see a series of tabs. To import your products from the 3dcart store to your QuickBooks Company file use the following steps.

1. Click on the third tab which is labeled "3dcart Product Imp/Exp"
2. Click on Retrieve products from 3dcart
3. The application will list your store's products.



4. Next, click on your Import option.

Tip: With the 3dcart/QuickBooks Plugin application you can also export your products from your QuickBooks Company file to your 3dcart store. However, keep in mind that

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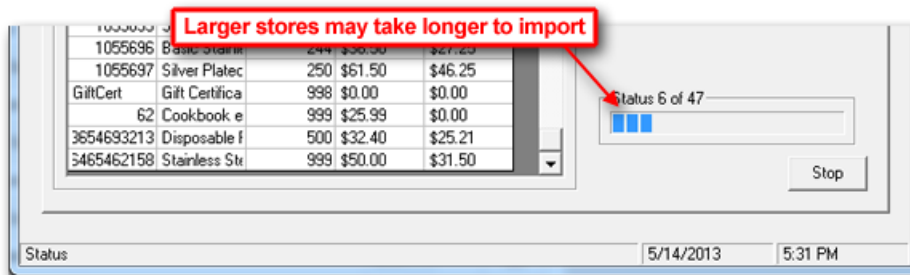
3dcart/QuickBooks Plugin



discount and product options/variants must be configured directly on your 3dcart Online Store Manager afterward.

You can either import all items or only items which are currently in stock

Note: You may have to re-confirm the permissions setting from earlier in this document. Also, the larger your store, the longer time it will take to import/export your items.



Once your product import/export is complete, you may proceed to the next steps of importing your orders.

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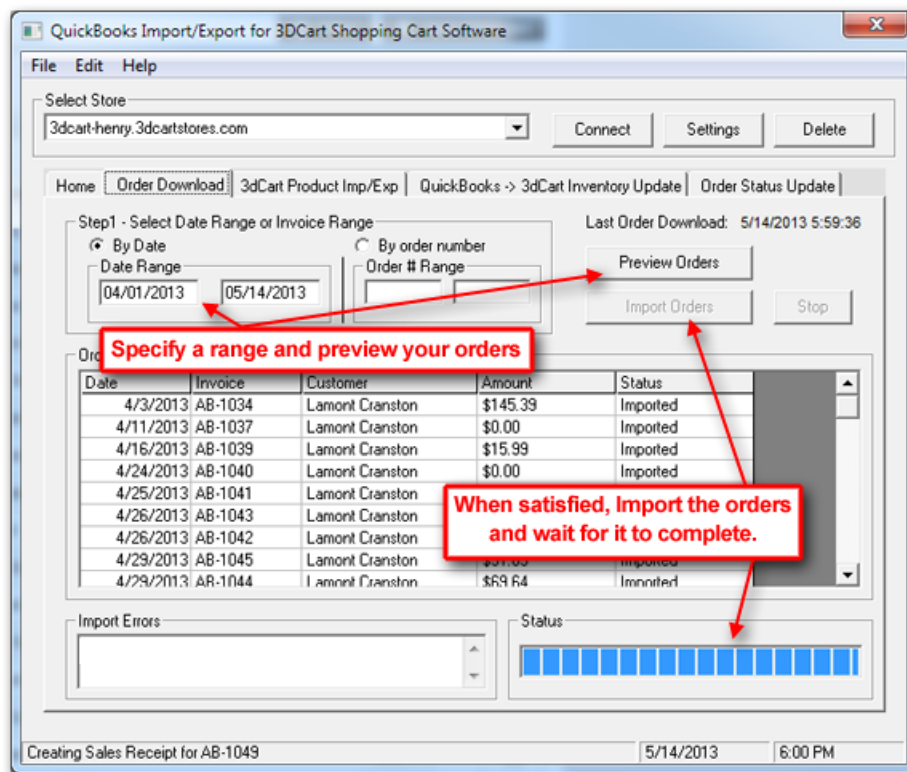
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Part IV - Order Importing

Once you have matching products in both your 3dcart Store and your QuickBooks Company File, you can begin downloading orders from your 3dcart store to QuickBooks.

1. Click on the "Order Download" tab at the top
2. Specify a date range of the orders you'd like to retrieve.



3. Click on Preview Orders to make sure the date range is applicable to your store.
4. If you're satisfied with the date range, click on "Import Orders"

The plugin will then download the orders to your QuickBooks Company file and create invoices as needed.

Part V - Troubleshooting

As mentioned previously, the 3dcart/QuickBooks Plugin acts as a sort of bridge to help facilitate importing/exporting between the data on your 3dcart Store to the data on your QuickBooks program. As such, it is often necessary to have your products and data on both sides of the bridge to match completely. Here are a few common issues that can happen with your 3dcart/QuickBooks integration and some ways to help alleviate them.

Issue: Order Import generates an "Item error" message.

Cause: The most common cause of this issue occurs when downloading orders *before* importing your store products to the QuickBooks Software. Since the QuickBooks Company File database does not have a record of the product, an order for that product has no reference.

Solution: Import your products first before Importing orders. It is always a good practice to always import products to your QuickBooks Company File before importing orders.

Issue: "Error 20805: There was an error when storing "[insert item name]" in the inventory name field.."

Cause: This error message is usually caused by special characters being present in the Product ID/SKU on your 3dcart store. QuickBooks sometimes has difficulty with special characters, so they should be avoided on your product IDs.

Solution: Avoid the following in your product ID/SKUs:

- < - less than symbol
- > - greater than symbol
- & - ampersand
- ' - apostrophe
- " - quotation
- : - colon

Issue: Product options with Part Numbers not recognized by QuickBooks.

Cause: When a product on your 3dcart store has an option, and that option has a part number specified for it; on the order the product ID/SKU is labeled with the part number appended to it. In other words, ID 1001 with option part number 5 selected will show up on the order as 10015. This causes QuickBooks to not recognize the product during import.

Solution: Use 3dcart's [Advanced Options](#) functionality and specify the advanced option code as the part number. This will treat each option as its own sku on the QuickBooks Company File database.

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The above are just the most common issues we see often. 3dcart support is always available to help with other issues you might experience.

END – You’ve reached the end of this guide.

3dcart has many other features not listed on this guide, once your store is up and running continue exploring the features located on the different areas of your Store Manager. If you have additional questions about any of the features you can read the full documentation at <http://help.3dcart.com>; or clicking on the Help Icon from your Store Manager left navigation bar.

Contacting 3dcart

3dcart’s support team is ready and willing to help you. Feel free to contact us at any time and also visit our online knowledgebase and user forums that have many of your questions and issues already answered.

Web: <http://support.3dcart.com>

KB: <https://support.3dcart.com/Knowledgebase/List>

Forums: <http://forums.3dcart.com>

Email: support@3dcart.com

Phone: (800) 828-6650 x 3

Thank you for using 3dcart.

Sincerely,

3dcart Support Team

support@3dcart.com