**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

**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](image1.png)

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

![Figure 1-2: Miva Synchro main screen](image2.png)
Adding a Store to Miva Synchro

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

![Add Store Wizard start screen](image1)

**Figure 1-3:** Add Store Wizard start screen

2. Click Next.

![Add Store Wizard dialog 2](image2)

**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**.

![Figure 1-5: Add Store Wizard dialog 3](image)

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**.
8. Select the Miva Merchant Storefront you wish to synchronize with.
9. Click Next.
10. Check all three boxes:
   - Download Orders From Miva Merchant
   - Synchronize Product Information
   - Synchronize Customer Account Information

11. Click Next.

12. Select to Record Orders As Sales Orders.

13. Click Next.

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.

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.
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.
Product Properties

4. From the Properties dialog, click Products.

![Properties: Products dialog](image)

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.
Tax Codes

- Taxable: Tax
- Non Taxable: Non

6. Click OK.

Customer Properties

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

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 dialog](Image)

*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 QuickBooks **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.
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.

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**.

![Synchronizing Orders in Miva Synchro](image)

*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

Order Properties

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.

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.

![Figure 1-19: New Item – mm-shipping](image)

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

Configuring mm-tax-item

a. Select Edit > New Item.

![Figure 1-20: New Item – mm-tax-item](image)

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 – mm-tax-invoice](image)

*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.