

Miva Synchro Preliminary Beta Documentation vBeta11

Overview

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.

Miva Synchro is comprised of two components:

- A windows application, SYNCHRO.EXE
- A Miva Merchant module, synchro.mvc

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.

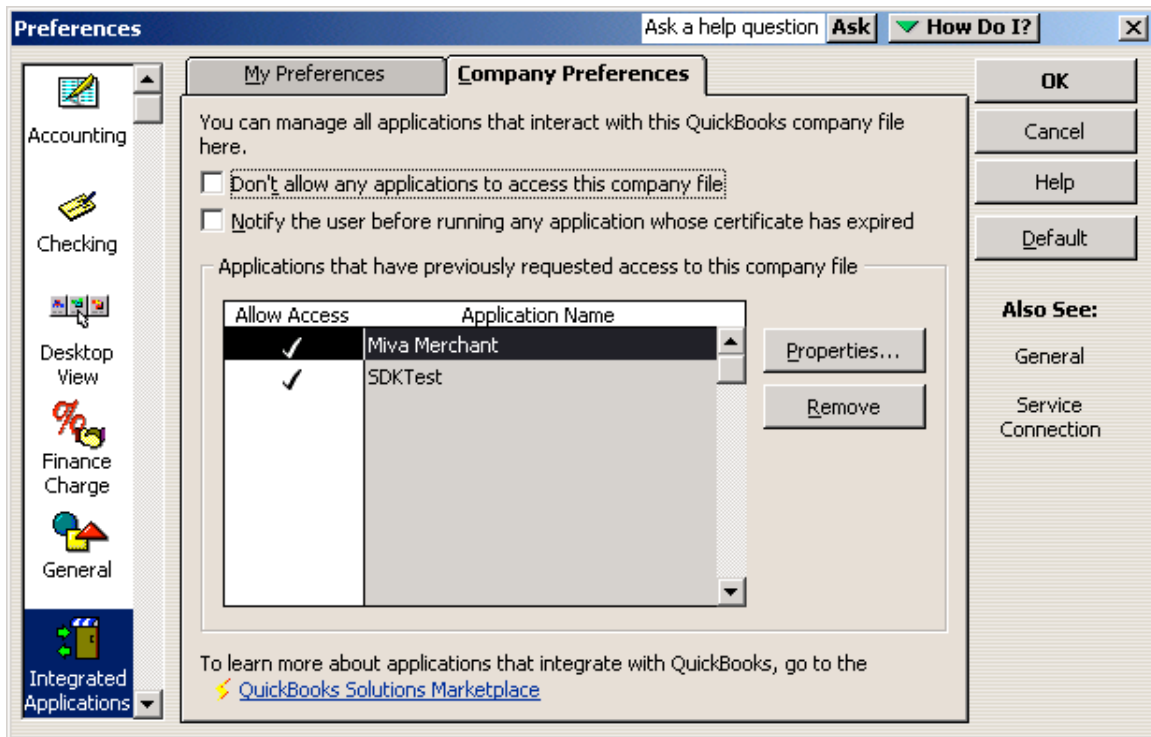
QuickBooks File Access

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:

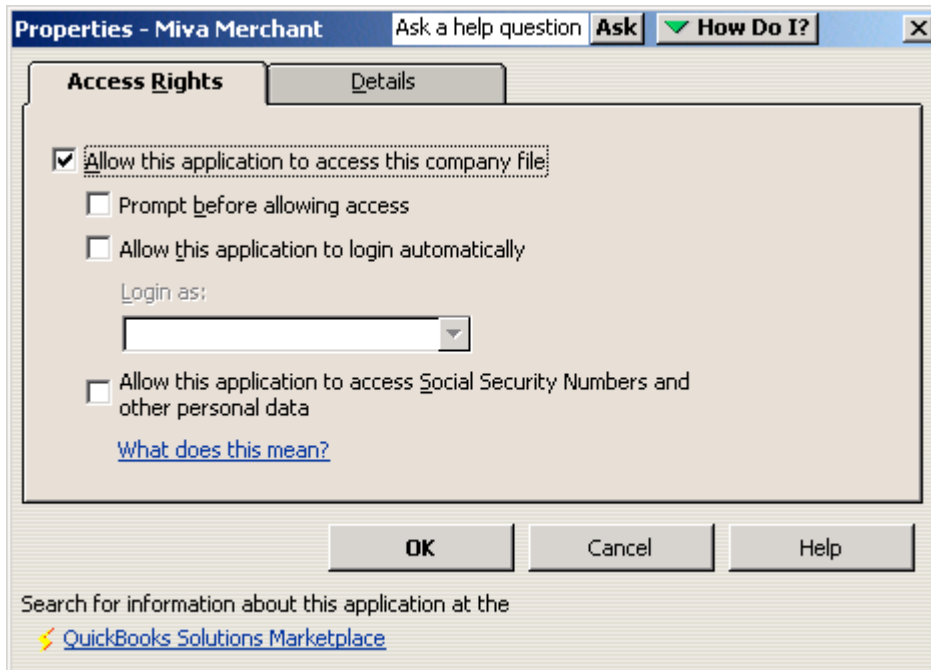


By pressing the “Yes, This Time” or “Yes, Always” buttons, you will allow Miva Synchro to access the QuickBooks file. Pressing the “No” button will deny access, and Miva Synchro will be unable to continue processing.

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.

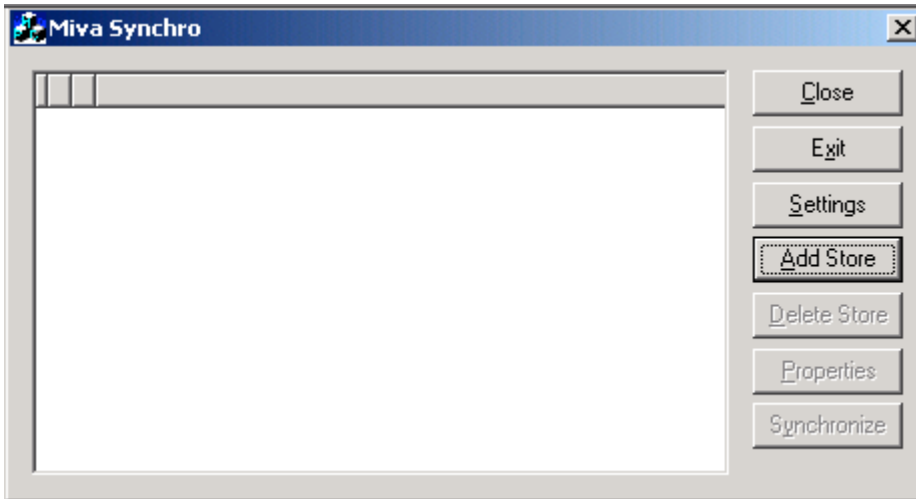
Installation

Before Miva Synchro can be used, the Miva Merchant Module *synchro.mvc* must be installed in the store you wish to synchronize. To 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

Configuration

To begin configuration, launch Miva Synchro. After dismissing the “Beta Notice” warning, the “Miva Synchro” dialog box will appear.



Click on “Add Store”. The “Properties” dialog will appear.

The image shows a "Properties" dialog box with a blue title bar and a close button (X) in the top right corner. It is divided into several sections:

- Miscellaneous:** Contains a "Name:" text input field and a "Synchronization Log:" text input field with a "Browse" button to its right.
- QuickBooks:** Contains a "File:" text input field with a "Browse" button to its right.
- Miva Merchant:** Contains four text input fields labeled "URL:", "Store Code:", "Login:", and "Password:".
- Synchronization:** Contains two radio buttons: "Manual" (which is selected) and "Automatically synchronize every". The "Automatically" option is followed by a numeric input field containing "12" and a dropdown menu labeled "Hour(s)".

On the right side of the dialog, there is a vertical stack of buttons: "OK", "Cancel", "Products", "Customers", and "Orders".

Miscellaneous: Name

An identifier for this store within Miva Synchro. We recommend you enter the name of the store in Miva Merchant.

Miscellaneous: Synchronization Log	(Optional) If specified, Miva Synchro will create a log of its progress during synchronization.
QuickBooks: File	The full path to the QuickBooks company file that will be synchronized with this store.
Miva Merchant: URL	The full path to your Miva Merchant administration. This would take the form of: http://www.somesite.com/Merchant2/admin.mvc
Miva Merchant: Store Code	The store code of the Miva Merchant store that will be synchronized with QuickBooks.
Miva Merchant: Login	The administrative username of the user that Miva Synchro will use to access the store.
Miva Merchant: Password	The administrative password of the user that Miva Synchro will use to access the store.
Synchronization: Manual	Disables automatic synchronization.
Synchronization: Automatically ...	Causes Miva Synchro to automatically synchronize the Miva Merchant store with QuickBooks at the specified interval.

Once you have specified a QuickBooks file, the “Products”, “Customers”, and “Orders” buttons will become enabled.

Product Synchronization

Miva Synchro is capable of synchronizing your Miva Merchant products with QuickBooks items. Both inventory and non-inventory items are supported. If you are tracking inventory in QuickBooks, and using the Miva Merchant inventory feature, Miva Synchro will keep your Miva Merchant inventory.

Changing the quantity available for a product within Miva Merchant will not update QuickBooks. This is done to prevent confusing QuickBooks accounting methods for cost basis. Any time the inventory changes within QuickBooks, however, the quantity available within Miva Merchant will be updated.

From the “Properties” dialog, press the “Products” button. The “Properties: Products” dialog will appear.

Properties: Products [X]

Synchronization Settings

Synchronize Products Created in Miva Merchant

Synchronize Products Created in QuickBooks

Conflict Resolution: Miva Merchant Overwrites QuickBooks

Sync Direction: Miva Merchant -> QuickBooks

Full Product Scan at Next Synchronization Track Cost for Non-Inventory Items

Selective Synchronization Custom Field: <none>

Assign New Products to the Following:

Price Groups: [Empty Box]

Availability Groups: [Empty Box]

Accounts

COGS: Cost of Goods Sold

Asset: <none>

Income: Sales

Expense: Miscellaneous

Custom Fields

Weight: <none>

Thumbnail Image: <none>

Fullsized Image: <none>

Tax Codes

Taxable: Tax

Non Taxable: Non

OK

Cancel

Sync. Settings: Synchronize Products Created in Miva Merchant	If checked, products that already exist in Miva Merchant will be created/synchronized in QuickBooks.
Sync. Settings: Synchronize Products Created in QuickBooks	If checked, products that already exist in QuickBooks will be created/synchronized in Miva Merchant.
Sync. Settings: Conflict Resolution	Determines the handling of products that are simultaneously changed in both QuickBooks and Miva Merchant.
Sync. Settings: Sync Direction	Controls the direction of synchronization.
Sync Settings: Full Product Scan at Next Synchronization	If checked, Miva Synchro will attempt to synchronize all products in QuickBooks/Miva Merchant. If not checked, only products that have been modified since the last synchronization will be synchronized.
Sync Settings: Track Cost for Non-Inventory Items	If checked, Miva Synchro will assign a purchase cost to any products created in QuickBooks.
Sync Settings: Selective Synchronization Custom Field	If set, Miva Synchro will only synchronize QuickBooks products that have the custom field specified with a value of "Y" or "y".

Custom Fields: Weight, Thumbnail, Fullsized	If set, the QuickBooks custom fields specified will be synchronized with the corresponding Miva Merchant field. NOTE: Due to a limitation of the QuickBooks API, this synchronization can currently only occur in the QuickBooks -> Miva Merchant direction.
Accounts: COGS	Specifies a Cost of Goods Sold account within QuickBooks.
Accounts: Asset	Specifies an Inventory Item Asset account within QuickBooks. This field is only required if you are synchronizing inventory between QuickBooks and Miva Merchant. If set to “<none>” inventory will not be synchronized.
Accounts: Income	Specifies an Income account within QuickBooks.
Accounts: Expense	Specifies an Expense account within QuickBooks. This field is only required if you have selected “Track Cost for Non Inventory Items”.
Assign New Products...: Price/Availability Groups	Allows you to specify one or more price groups to which products created in Miva Merchant will be assigned.
Tax Codes: Taxable/Non-Taxable	These fields specify which tax codes are associated with taxable or non-taxable products in Miva Merchant.

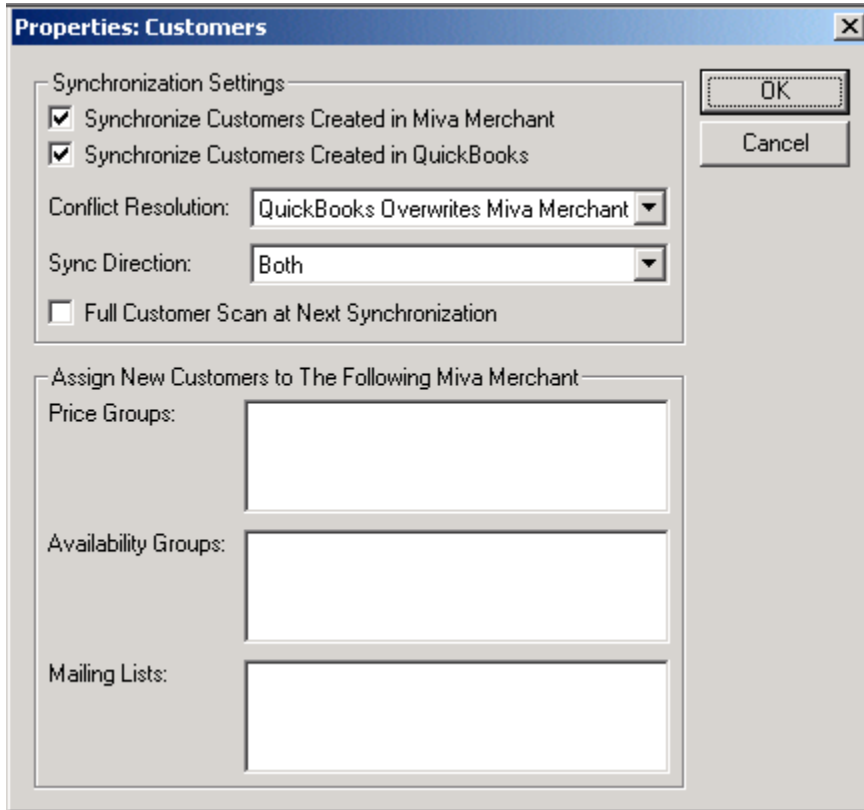
Customer Synchronization

Miva Synchro is capable of synchronizing your Miva Merchant customers with QuickBooks customers.

Whenever a new customer is created in Miva Merchant, the customer is assigned a unique login based on their billing first/last names, and a randomly generated password. It is possible to use Miva Mailer and the Assign To: Mailing Lists feature of Miva Synchro to automatically mail new Miva Merchant customers their logins/passwords.

Miva Synchro does not attempt to match existing customer accounts within QuickBooks/Miva Merchant. This is done as a security precaution to prevent “leaking” customer information if the synchronization were to associate the wrong customer accounts. Once a customer account is created in Miva Merchant or QuickBooks and synchronized to the other application, however, any changes in either application will properly update the other application.

From the “Properties” dialog, press the “Customers” button. The “Properties: Customers” dialog will appear.



Sync. Settings: Synchronize Customers Created in Miva Merchant	If checked, customers that already exist in Miva Merchant will be created/synchronized in QuickBooks.
Sync. Settings: Synchronize Customers Created in QuickBooks	If checked, customers that already exist in QuickBooks will be created/synchronized in Miva Merchant.
Sync. Settings: Conflict Resolution	Determines the handling of customers that are simultaneously changed in both QuickBooks and Miva Merchant.
Sync. Settings: Sync Direction	Controls the direction of synchronization.
Sync Settings: Full Customer Scan at Next Synchronization	If checked, Miva Synchro will attempt to synchronize all customers in QuickBooks/Miva Merchant. If not checked, only customers that have been modified since the last synchronization will be synchronized.
Assign New Customers...	These fields allow you to specify Price Groups, Availability Groups, and Miva Mailer Mailing Lists to which newly created customers in Miva Merchant will

be assigned.

Order Synchronization

Miva Synchro is capable of downloading your Miva Merchant orders and creating corresponding QuickBooks invoices.

From the “Properties” dialog, press the “Orders” button. The “Properties: Orders” dialog will appear.

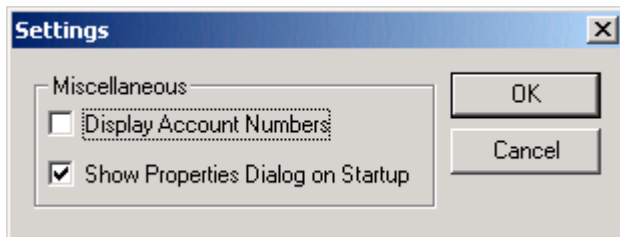
Sync Settings: Synchronize Orders Created in Miva Merchant	If checked, orders will be downloaded from Miva Merchant, and corresponding invoices will be created in QuickBooks.
Sync Settings: Order # Prefix	(Optional) If set, the value of this field will be prepended to the Miva Merchant order number to create the invoice number. This can be used to prevent conflicts between manually entered or non-Miva Merchant invoices and invoices created by Miva Synchro.
Sync Settings: Last Order #	Displays the last order that was downloaded from Miva Merchant. You may change this value to force Miva Synchro to re-download invoices. Any

	invoices that already exist in QuickBooks will be skipped.
Sync Settings: Sales Rep:	(Optional) If set, Miva Synchrono will assign newly created invoices to the specified sales rep. This can be used to track the performance of your Miva Merchant storefront.
Sync Settings: Record Orders As:	Determines whether orders will be created in QuickBooks as Sales Receipts or Invoices.
Sync Settings: Deposit Account:	This field specifies the account into which funds will be deposited for the order. This setting is only available when orders are being created as Sales Receipts.
Sync Settings: AR Account:	This field specifies the accounts receivable account within QuickBooks that will be assigned to the invoice. This setting is only available when orders are being created as Invoices.
Terms/Payment Method: None	If set, the QuickBooks sales receipt/invoice will be created with no payment terms/method specified.
Terms/Payment Method: Create/Use Miva Merchant Payment Method	If set, Miva Synchrono will create a new set of terms (or payment method if using Sales Receipts), or use an existing set of terms/payment method with the name equal to the Miva Merchant payment method (for example: "Visa").
Terms/Payment Method: Use Fixed	If set, Miva Synchrono will always assign the specified payment terms/method to the invoices/sales receipts it creates.
Shipping: Create Invoice Line Item	If set, Miva Synchrono will create an invoice line item for the shipping charges assessed by Miva Merchant. The item specified in "Invoice Line Items For Shipping Use" will be used, and the shipping method on the QuickBooks invoice will be left unspecified.
Shipping: Create/Use Miva Merchant Shipping Method	If set, Miva Synchrono will create a new shipping method, or use an existing shipping method with the name equal to the Miva Merchant shipping method (for example: "UPS Next Day Air").
Shipping: Use Fixed	If set, Miva Synchrono will always assign the specified shipping method to the invoices it creates.

Shipping: Invoice Line Items For Shipping Use Item	This field specifies the item that is used whenever Miva Synchro creates a shipping charge related invoice line item. In addition to the invoice line item created if the “Shipping: Create Invoice Line Item” option is chosen, some payment methods (such as COD) create shipping charges that will result in invoice line items being created.
Sales Tax: Allow QuickBooks to Apply/Recalculate	If set, Miva Synchro will allow QuickBooks to apply the default tax item to the invoice/sales receipt.
Sales Tax: Create Invoice Line Item	If set, Miva Synchro will create an invoice line item for sales tax.
Sales Tax: Line Tax Item	Specifies the name of the sales tax item that will be used for the sales tax line item(s).
Sales Tax: Invoice Tax Item	Specifies the name of the sales tax item that will be applied to the invoice/sales receipt. QuickBooks requires that a sales tax item still be applied to the entire invoice/sales receipt. It is recommended to create a 0% sales tax item called “Tax On Invoice” to apply to the invoice/sales receipt.

Settings

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



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 Syncho icon in the taskbar and selecting “Properties”

Synchronizing

To perform a manual synchronization, highlight the desired store in the main “Miva Synchro” dialog and press the “Synchronize” button. A progress dialog will appear.

If you have configured one or more stores for automatic synchronization, Miva Synchro will synchronize the stores based on your automatic synchronization settings. The Miva Synchro icon in the system tray will spin while an automatic synchronization is in progress.