



## Zen Cart Quick Book Sync Web Service

Version 0.5

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# BACKUP !!!!!!!!!!!

**Do not Attempt installation of this Script with out Backing up BOTH your quickbooks files AND you shopping cart database. I will not be held responsible for destroying your company files.**

### Features

- Import Customers in to QuickBooks From Zen Cart
- Import Orders (as Sales Receipts) In to QuickBooks from Zen Cart
- Import Inventory Items into QuickBooks from Zen Cart

### Requirements:

- Requires PHP5 with SOAP Enabled (most installations do),
- QuickBooks 2005 or Later (Tested with QB2006 US)
- [Quickbooks Web Connector Installed on QB Computer](#)

### Installation

#### Quick Books

You will need to perform the following functions inside QuickBooks to prepare your company.

- Ensure your using a **Standardized Naming Convention** for your Customer Names, This is how we link the orders to customers. The Most Common Format is “lastname,firstname” This is configurable in the script, but the format is it must be **STANDARD** company wide, if you or your employees have entered in Customers in a non-standard way i.e some “Firstname Lastname” others “Lastname, Firstname” you will need to correct this before you can use this script
- Create a Shipping Item. All Shipping Charges will be posted to this item. The Description will be the text from the shipping Module “i.e FEDEX Ground”, but the charges will all be recorded to a single shipping item
- Create a Sales Tax Item. For the same as Above
- Write down the Name of your company file
- If you choose not to Import Items from Zen Cart into Quick Books, you must ensure the that “Model Number” listed in Zen Cart is the “Item Name” in QuickBooks, these must match **EXACTLY** and they are case sensitive
- If you want to Import All of the items Write down your sales account, cost of goods sold account and assets account.
- You also **MUST** have all of the Manufactures added added “Vendors” In QuickBooks, If these are not Your Vendors You will need to **MANUALLY** add the products.
- Ensure that “Track Inventory” is Turned on in QuickBooks.

## Configure the Script

Open up the “quickbooksSync/qbClass.php” file so you can set some Configuration Variables

- **Constants**
  - Table Definations
    - i) These should not be changed unless you modified the install script
- **Settings Object**
  - **nameFormat**
    - i) This is the Variable where you we the Name format, the placeholders {firstname} and {lastname} will be dynamically replaced by the script when the qucikbooks request is made.
    - ii) This is your standardized Format, for example Doe,John would be {lastname},{firstname}
  - **customerParent**
    - i) If you have a Parent Customer you would like all customers placed under you would put that here. The company this was made for has sales across several areas, their web site is a very small part of their over all sales so they wanted to put all of the Customers coming from the Web Site under a customer called “WebCustomers”
  - **orderPending**
    - i) If you want to set the order as pending in QuickBooks, 1 for Ture 0 for False

- ii) It does not appear orders set as pending show up in the Reports inside quickbooks, and I am not sure how to change an order from Pending to Non-Pending. I would leave this as false
- **printOrder**
  - i) 1 is True, 0 is false
  - ii) Adds the imported order to the Print Reminder Que
- **addProducts**
  - i) true or false
  - ii) If this is set to true it will query the database and look for Products that have not been added to quickbooks and add them
- After installation the Script assumes you added the product to Quickbooks as well as the cart, no new products will be added automatically, If you want to change this behavior, change the “default value” in the Products Table, QuickBooks column from 1 to 0
- **shippingItem**
  - i) So to the Complexity of the Shipping Modules and the way QuickBooks Tracks this I have not added the ability to track every shipping options from every module, all Shipping Charges are Added to a Single Item inside QuickBooks.
- **salesTax**
  - i) same as above only with salesTax. So if you charge more than 1 Sales tax you will need to manually adjust the Sales Receipts
- **IncomeAccount**
  - i) This is the Default Income Account for the Products added by the Script
  - ii) Default is “Sales:Merchandise”
- **COGS**
  - i) This is the Cost of Goods Sold Account
- **AssestAccount**
  - i) This is the Inventory Asset Account
- **MarkUp**
  - i) When you add a Product you have to add a Cost, since Zen does not track Cost we will use a Standard Markup to Estimate the Cost of the Product,
  - ii) Example Selling Price: \$10, markup 30 = Cost: \$7

## Upload the Files

Now it is time to upload the Files, Upload them in the File Structure they were in the zip file:

```
/admin/qbAdmin.php  
/quickbooksSync/qbClass.php  
/qbServer.php
```

## The Database

If you use a Prefix or have changed the name of the Customers, Orders or Products Table, Open the install.sql file and Modify the First 3 Lines to reflect those changes

If you are NOT importing products REMOVE line 5

Run the “qbInstall.sql” file on your database

By Default the Script will NOT attempt to Import Existing order, I assume these have already been added to QuickBooks, If you are creating a new Company and want to import everything simply change the “1” to “0” and then all orders will be imported on your first sync

## QWC File

I have not had the time to create a QWC Creator so we have to create the QWC File, it is a Simple XML File, We can do this by editing it the example that you downloaded.

Open up the QWC File in NotePad or some other Text file, you will see

```
<?xml version="1.0"?>  
<QBWCXML>  
<AppName>ZenCart Quickbooks Sync</AppName>  
<AppID></AppID>  
<AppURL>https://YOURDOMAIN/qbServer.phpAppURL</AppURL>  
<AppDescription>Zen Cart Sync</AppDescription>  
<AppSupport>http://YOURDOMAIN/admin/qbAdmin.php </AppSupport>  
<UserName>YOUR ZEN ADMIN NAME</UserName>  
<OwnerID>{CD8D6B56-9AF2-11DD-ACC9-5D4756D89593}</OwnerID>  
<FileID>{DE1D7660-9AF2-11DD-8D53-5A4856D89593}</FileID>  
<QBType>QBFS</QBType>  
<Scheduler>
```

```
<RunEveryNMinutes>1440</RunEveryNMinutes>
</Scheduler>
</QBWCXML>
```

You will need to Edit the following Sections

❖ **AppURL**

- This Must be a Secure “https” url,
- URL to the qbServer.php file

❖ **AppSupport**

- This Must be on the same domain as the AppURL
- URL to the qbAdmin.php file

❖ **UserName**

- This is your Zen Cart Admin User Name

❖ **RunEveryNMinutes**

- Who many minutes do you want to wait between Auto Syncs, 1440 is 1 day.

Open Quickbook Web Connector, add the Application

You will be prompted by Quickbooks for access to the File.

**NOTE**

In Testing the Sync Failed in some cases on the Initial Try, If this happened you must go in to QuickBooks, “edit” -> “Preferences” Find the “Integrated Applications” **Company Tab** Make sure the Zen Cart Application has access.

Now you should not be able to Sync your Cart and Quickbooks,

There is a Log Viewer in the qbAdmin File,

**ToDo**

- ❖ **Add Inventory Sync**
- ❖ **Improve Logging and Admin Section**
- ❖ **Allow for Multiple Shipping and Sales Tax**
- ❖ **Better Order, Customer and Inventory Tracking and Que**
- ❖ **Integration with QBMS module, and possibly others**

