

# Index

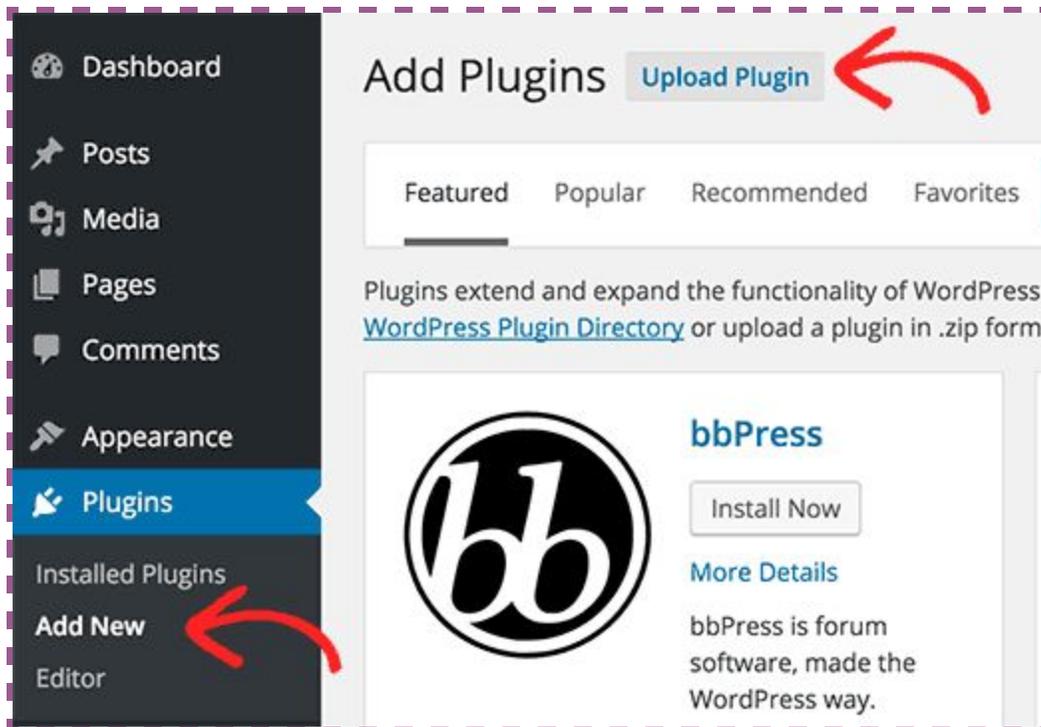
<b>How to install InfinitySync Plugin</b>	<b>2</b>
Step 1 - Add the InfinitySync Plugin to plugins listing	2
Step 2 - Proceed to Installation	3
<b>How to use the Activation email and Activation code</b>	<b>4</b>
<b>Setup and Settings</b>	<b>5</b>
Connection Settings	5
InfinitySync Username	5
InfinitySync Password	5
Sync Frequency	5
Time Zone	5
Connection Setup	6
QWC File	6
Use of QWC File	6
Start Import	6
Enable Customer Sync	8
Enable Tax Sync	9
Tax Settings	9
Enable Coupon Sync	10
Coupon Settings	10
Enable Product Sync	11
Products Settings	11
Enable Order Sync	12
Order Settings	12
<b>Products Listing (Mapped and Unmapped Listing)</b>	<b>14</b>
Simple Products	14
Products with Variations	16
<b>Customer Listing (All WooCommerce Customers)</b>	<b>18</b>
<b>Taxes Listing (All WooCommerce Taxes)</b>	<b>19</b>
<b>Coupons Listing (All WooCommerce Coupons)</b>	<b>20</b>
<b>Orders Listing (All WooCommerce Orders)</b>	<b>21</b>

# How to install InfinitySync Plugin

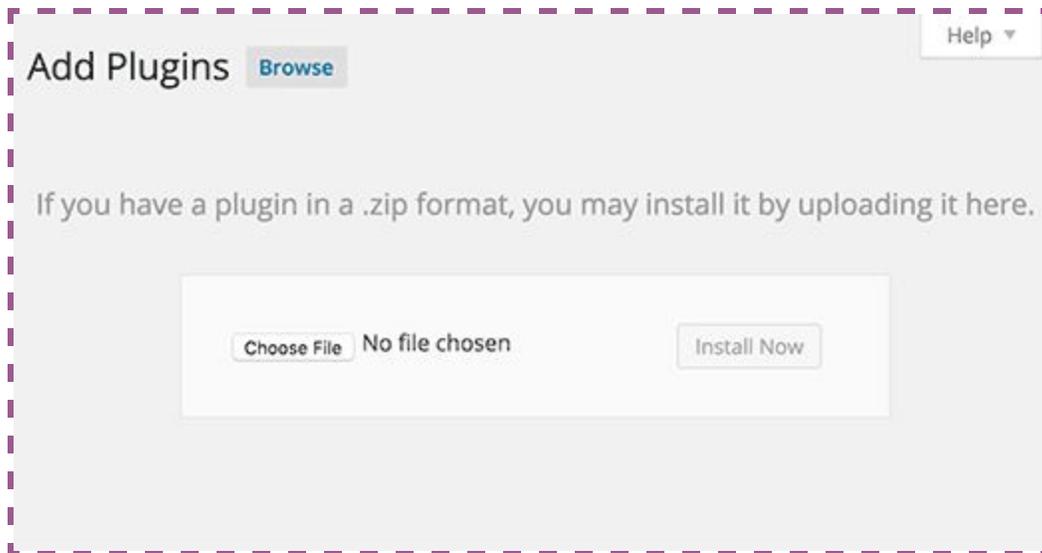
After purchasing and downloading the InfinitySync Plugin, follow the installation steps below:

## Step 1 - Add the InfinitySync plugin to plugins listing

Go to WordPress admin area, then **Plugins » Add New**. Then, click on the **Upload Plugin** button on top of the page.



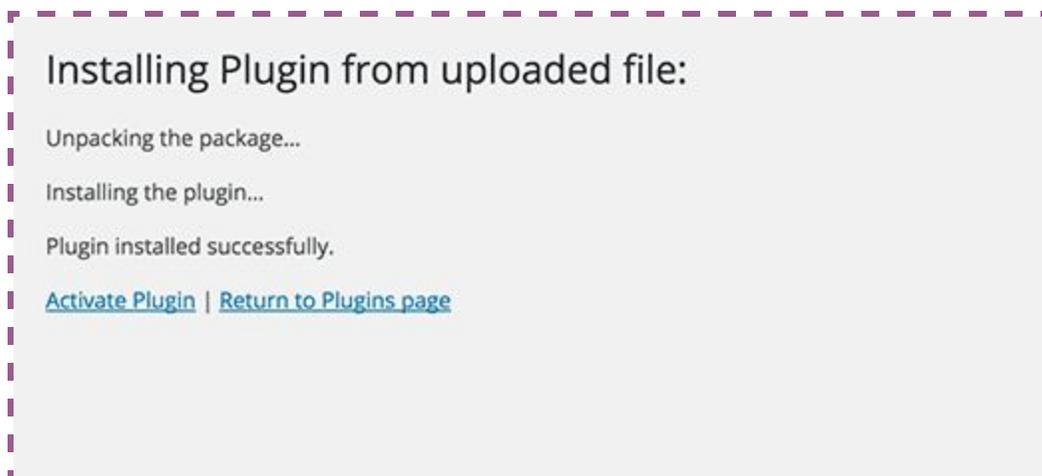
The plugin upload page will open. Click on the **Choose File** button and select the InfinitySync plugin file you downloaded earlier.



## Step 2 - Proceed to Installation

Select the downloaded InfinitySync plugin file, then click the **Install Now** button.

WordPress will now upload the plugin file from your computer and install it. After installation is complete, you will receive a success message:



# How to use the Activation email and Activation code

When you purchased the InfinitySync plugin, you received an activation email and activation code. After the plugin is installed, you will be redirected to the screen given below:



## License Activation

Please enter the license key you received after purchasing InfinitySync

Example: wc\_order\_XXXXXXXXXXXXXX\_XX\_XXXXXXXXXXXX

Please enter your email address used to purchase InfinitySync

Example: abc@example.com

**Activate**

Don't have an InfinitySync subscription? Visit [www.infinitysync.com](http://www.infinitysync.com) to learn more and sign up.

**Note:** Go to plugins listing page and click on settings if you are not redirected to settings page automatically.

Enter the **license key** and **license email** in the above fields and press **Activate** button. This information is found in the “my account” section under purchased plugins.

# Setup and Settings

After successful activation of the plugin, you will be taken to the setup page, containing the following fields:

## Connection Settings

### InfinitySync Username

The setup page will auto-populate a username based on the WordPress domain. If the domain is `www.example.com`, the username field will contain `example-infinitysync-user`. You can change this value.

### InfinitySync Password

The setup page will auto-populate a randomly generated password consisting of random letters, numbers, and symbols. A button next to the password field will allow users to generate a new random password.

Enter the password in the QuickBooks Web Connector to authenticate with the plugin.

### Sync Frequency

This is the initial interval used by Web Connector to connect to InfinitySync. We recommend selecting 5 minutes during the initial import. The frequency can be updated later in the Web Connector.

### Time Zone

Select your time zone from the dropdown list.



## Connection Setup

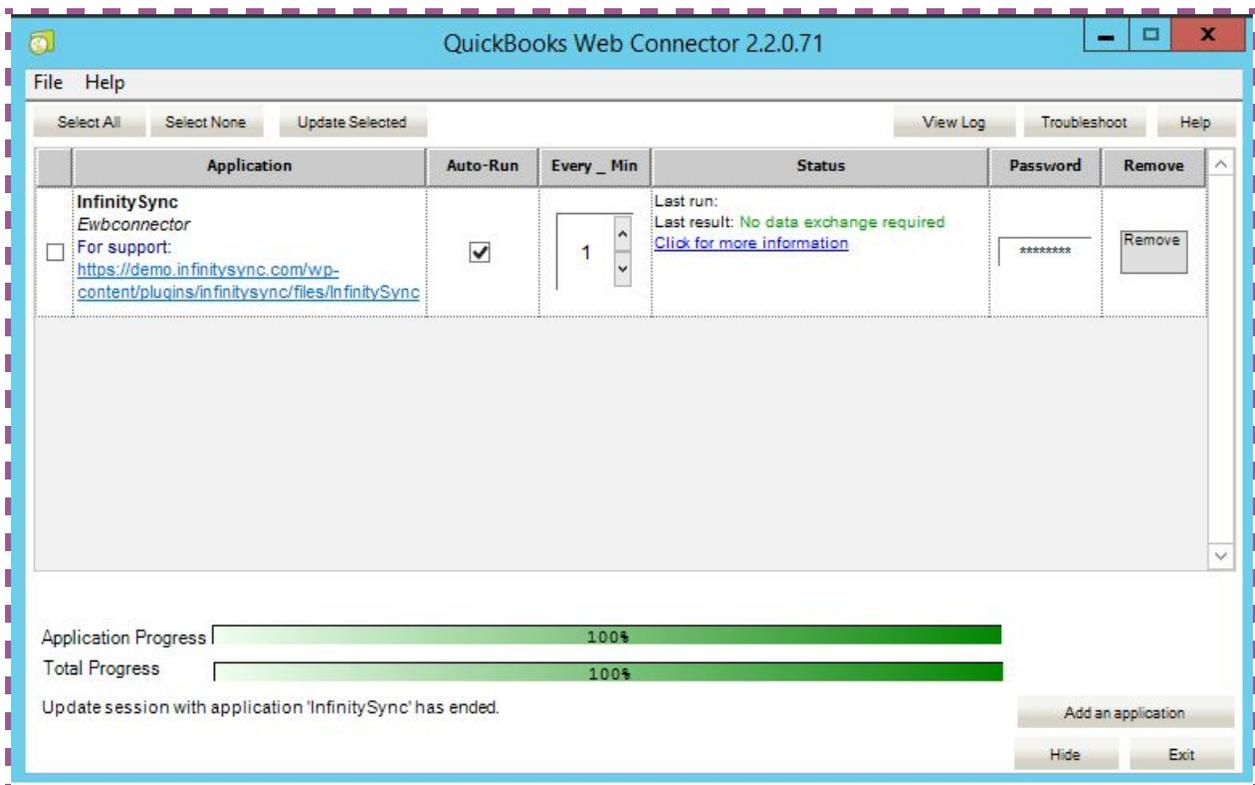
Once you have completed the connection settings section, InfinitySync is now ready to connect to QuickBooks!

### QWC File

QuickBooks Web Connector requires an XML file with a .qwc file extension to connect to a service. The InfinitySync plugin will create a file named **InfinitySync-setup.qwc** file after you have completed the setup page. Click on the **download button** to get the file on your local machine.

### Use of QWC file

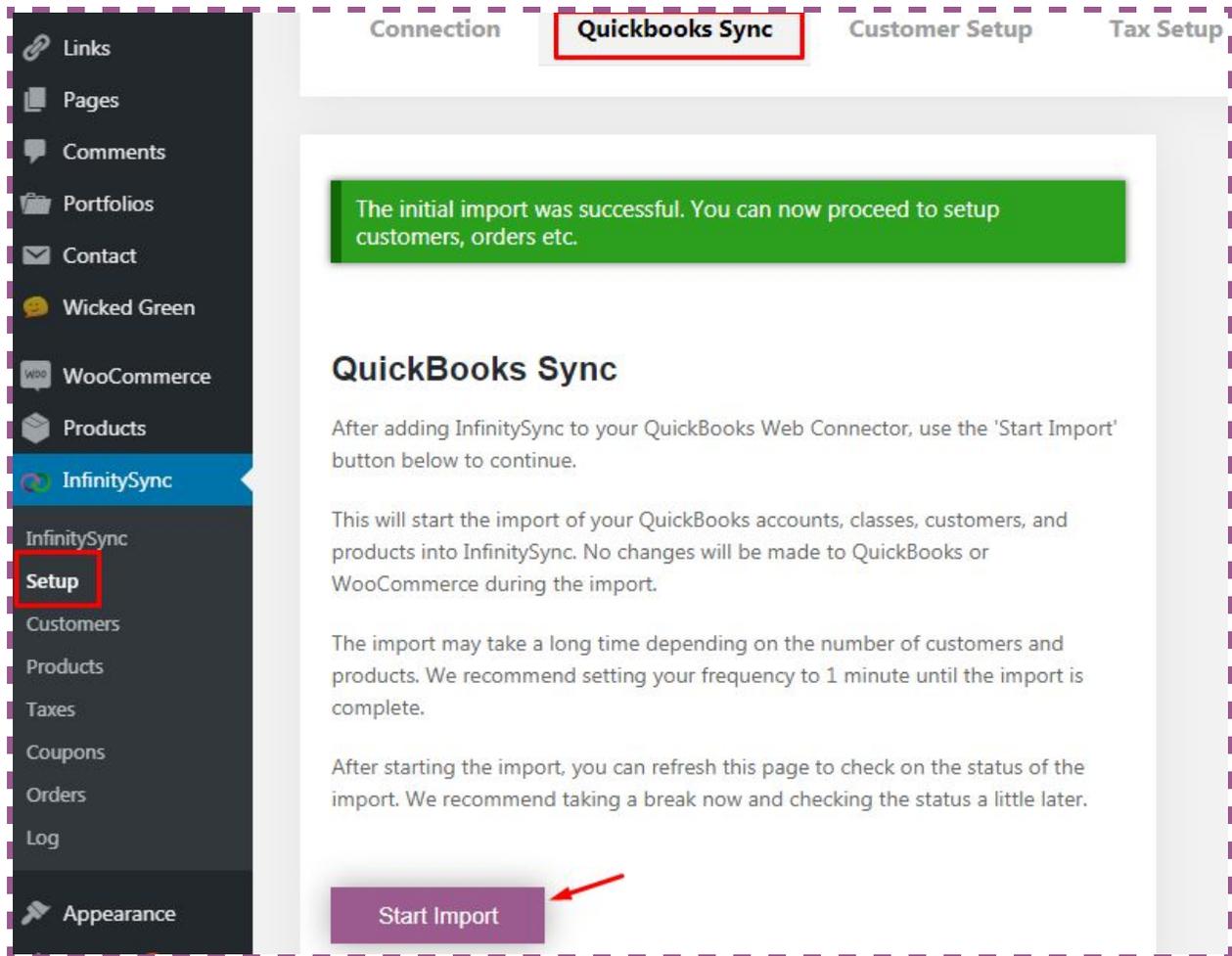
After you have downloaded the QWC file, open it using “**QuickBooks Web Connector**”. Once file has been loaded successfully, you will see the following screen:



Enter the password generated by the InfinitySync plugin. Save the password for future use.

## Start import

Return to the plugin's setting page and click on "Go to Import" button. You will be redirected to the following page:



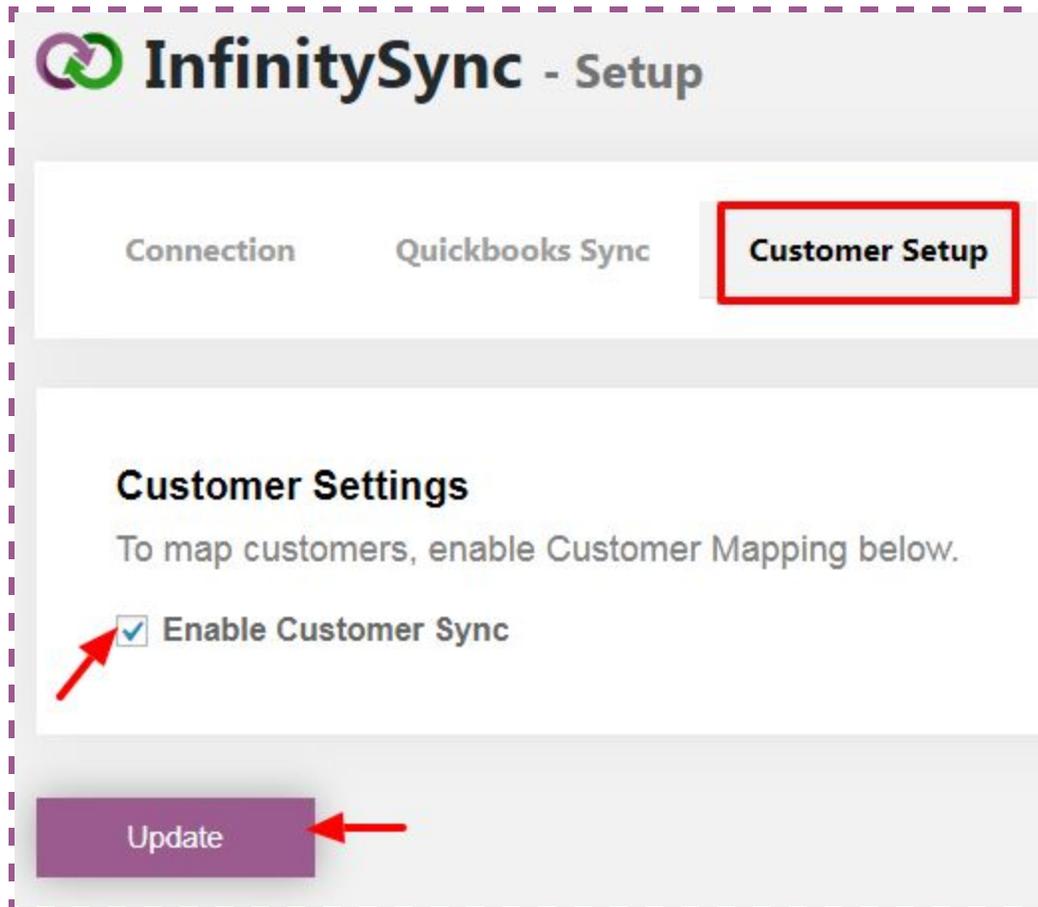
The screenshot shows the InfinitySync plugin's "QuickBooks Sync" setup page. On the left is a dark sidebar menu with "InfinitySync" selected and "Setup" highlighted. The main content area has a navigation bar with "Quickbooks Sync" selected. A green success message states: "The initial import was successful. You can now proceed to setup customers, orders etc." Below this is the "QuickBooks Sync" heading and instructions: "After adding InfinitySync to your QuickBooks Web Connector, use the 'Start Import' button below to continue." Further text explains that the import will sync QuickBooks accounts, classes, customers, and products, and that it may take time depending on the volume of data. A "Start Import" button is at the bottom, with a red arrow pointing to it.

Click the "**Start Import**" button.

Your plugin will start syncing with QuickBooks Web Connector software.

## Enable Customer Sync

Under the “**Customer Setup**” tab, check the box “Enable Customer Sync”. Then click the **Update** button.



The screenshot shows the 'InfinitySync - Setup' interface. At the top, there are three tabs: 'Connection', 'Quickbooks Sync', and 'Customer Setup'. The 'Customer Setup' tab is highlighted with a red border. Below the tabs, the section is titled 'Customer Settings' with the instruction 'To map customers, enable Customer Mapping below.' There is a checkbox labeled 'Enable Customer Sync' which is checked, with a red arrow pointing to it. At the bottom of the form, there is a purple 'Update' button with a red arrow pointing to it.

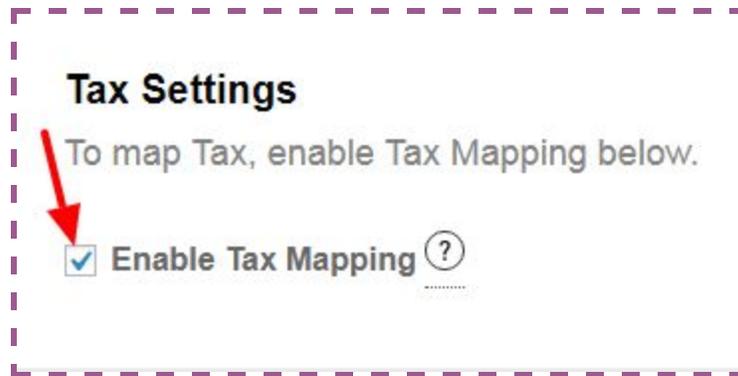
The import process of customers from QuickBooks will begin. Once all the customers have been imported, the process of creating WooCommerce customers on QuickBooks will begin automatically.

## Enable Tax Sync

Under the “**Tax Setup**” tab, there are two sections.

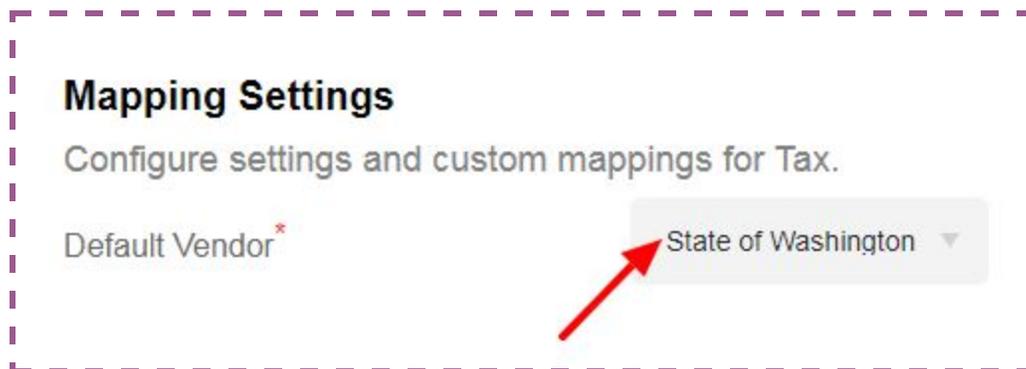
### Tax Settings

Similar to customer sync, click the checkbox “Enable Tax Mapping”. This completes the Tax settings.



### Mapping Settings

Choose the default vendor for the Tax Mapping from the dropdown menu. This vendor will be used for all your tax classes on QuickBooks.

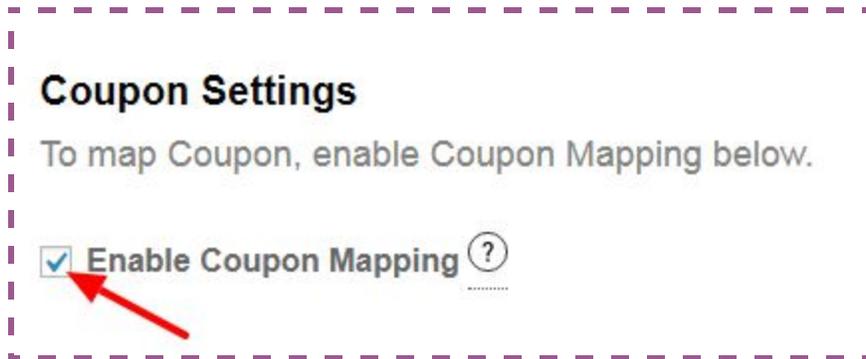


## Enable Coupon Sync

Under the “**Coupon Setup**” tab, there are two sections.

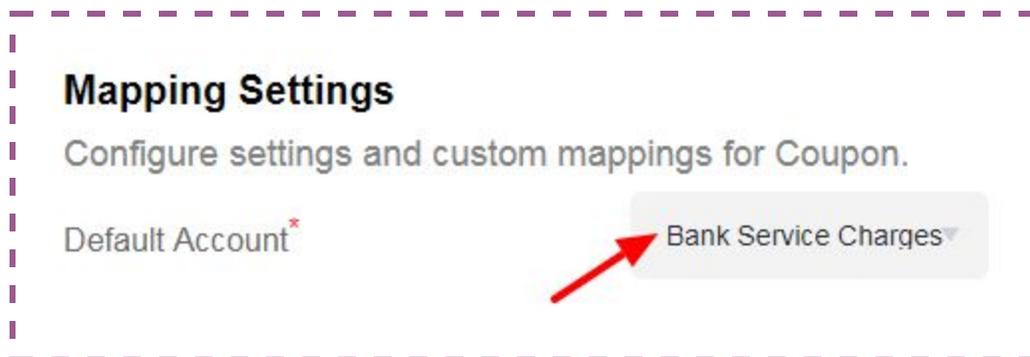
### Coupon Settings

“Enable Coupon Mapping” by clicking the checkbox.



### Mapping Settings

Choose the default account for the Coupon from the dropdown menu. This account will be used for all your Coupons on QuickBooks.

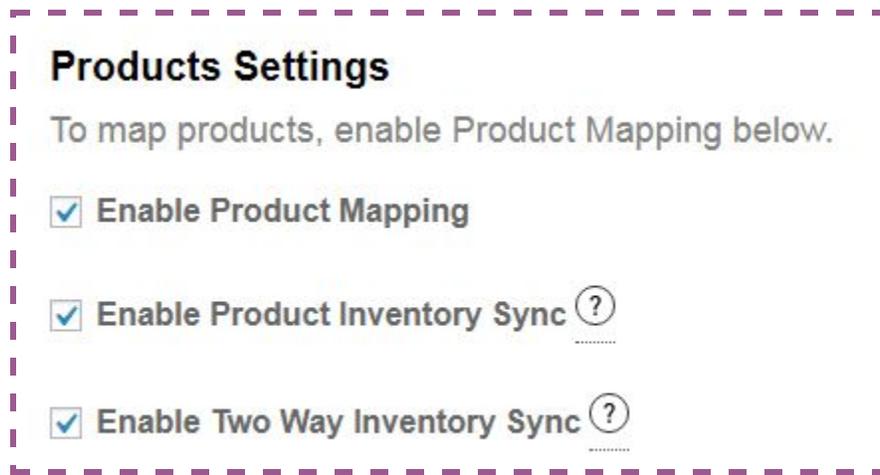


## Enable Product Sync

The Product sync section can be a bit complicated; however, the following steps will lead you through the entire process. There are basically two sections in Product Sync:

### Products Settings

Check all three boxes “Enable Product Mapping”, “Enable Product Inventory Sync” and “Enable Two Way Inventory Sync”, to complete the product settings section.



**Products Settings**

To map products, enable Product Mapping below.

Enable Product Mapping

Enable Product Inventory Sync 

Enable Two Way Inventory Sync 

### Mapping Settings

This section has five dropdowns, all of which are mandatory fields. Choose the appropriate option from dropdowns for the following sections:

- Default Product
- Sales Account
- Inventory Asset Account
- Cost of Goods Sold Account
- Shipping

The dropdowns contain all the accounts available in your QuickBooks software.

## Mapping Settings

Configure settings and custom mappings for products.

Default Product\*

Default Product ▼

Sales Account\*

Sales account ▼

Inventory Asset  
Account\*

Inventory Asset ▼

Cost of Goods Sold  
Account\*

Cost of Goods Sold ▼

Shipping\*

Shipping Fees ▼

You will receive a message stating the product import has been started. It may take a few minutes to complete the product sync.

**Note:** If a “WooCommerce product” is not mapped to “QuickBooks inventory item” and an order is made for that “WooCommerce product”, then the “QuickBooks inventory item” (chosen as default product) will be used as the order item.

## Enable Order Sync

Under the “**Order Setup**” tab, there are two sections:

### Order Settings

Check the “Enable Order Sync” checkbox to complete the Order Settings section.

## Order Settings

To map orders, enable Order Mapping below.

Enable Order Sync



## Mapping Settings

This section has a dropdown “Create Orders as”. Choose the type of order you want to create in QuickBooks for each WooCommerce order.

## Mapping Settings

Configure settings and custom mappings for orders.

Create Orders as \*

Sales receipt



# Products Listing (Mapped and Unmapped Listing)

In this section, there are two tabs: “Simple Products” and “Products with Variation”.

Before going through these two types of products, please note that you have to make the QuickBooks products as “inventory part” and all the QuickBooks products should match to WooCommerce products i.e. price, quantity on hand, SKU, etc.

For more direction on creating “inventory part”, please use the link:

<https://quickbooks.intuit.com/community/Inventory-and-projects/Add-edit-and-delete-items/td-p/201687>

## Simple products

This section is a list of all simple WooCommerce products (Without Variation). You can manage the simple product mapping with QuickBooks. You can map or unmap single products or use the bulk action to map multiple selected products to QuickBooks.

**Products Mappings**  
Below is a list of WooCommerce Products. Select the corresponding product from QuickBooks to map them.

Simple Products | Products with Variations

Enter Product Name or SKU | All | Search

Map all selected | Apply | Remap

<input type="checkbox"/>	Id#	Product Name	SKU	Quickbooks Product	Quickbooks Class	Action
<input type="checkbox"/>	1879	Backstabbers	RR02	RR02	class1	Cancel
<input type="checkbox"/>	1880	TestProductItem	Xt0p	Xt0p	class1	Cancel

Features in simple products section:

- Automap of products
- Remap products
- Bulk actions

These features are:

**Automap of products:** This feature allows the automatic mapping of WooCommerce products to QuickBooks products. For this feature to work successfully, the SKU of WooCommerce products should match the SKU of the QuickBooks products. This will automatically run when you set up the products mapping section.

Should there be some products in QuickBooks with the same product SKU after activation, use a second feature to remap the products manually. Just click the “**Remap**” button located on the top right corner of the product listing.

**Remap:** As explained above, this feature allows you to manually remap the products to QuickBooks if you have added matching products to QuickBooks (With same SKU as WooCommerce products) after plugin activation.

**Bulk actions:** Use this feature if you have QuickBooks products with different SKUs than WooCommerce products. You can use this option to map multiple selected products to QuickBooks products.

Follow these steps:

- Check the **checkbox left to Id#** in the product listing to select all the products.  
**Note:** Some checkbox are marked red and not clickable. This is because you may not have selected “QuickBooks product” or “QuickBooks class” from the dropdown next to the product name.
- Click on the “**Apply**” button and you are done. This will map all selected products to the appropriate QuickBooks products.



Map all selected ▾ Apply

1) Choose Quickbook product

2) Check this to select all

3) Click this button to map all selected

Id#	Product Name	Stock	SKU	Quickbooks Product	Quickbooks Class	Action
<input checked="" type="checkbox"/>	249 Hand And Body Lotion	83	WGL008	Burning Daylight	Equipment ?	Save
<input checked="" type="checkbox"/>	227 Warming Cream	82	WGF002	White Canvas Book/Tote Bag	Equipment ?	Save

Please create the product with same sku in QB and then remap items

Please create the product with same sku in QB and then remap items

Remap

## Products with Variations

In this section, all the WooCommerce products with multiple variations will appear. Similar to the simple products section, products with the same SKU will automatically get mapped to QuickBooks when you first set up the products in settings.

There are two parts in this section: the parent products and child products.

### Parent products:

The default listing in the variation tabs have all the parent products from WooCommerce. You have to map parent products to see the child products. To map the parent product:

- Select the applicable QuickBooks product from the dropdown next to the WooCommerce product
- Choose the class from QuickBooks class dropdown.
- Click the **Save** button.

<input type="checkbox"/>	Id#	Product Name	Stock	Quickbooks Product	Quickbooks Class	Variations	Action
<input type="checkbox"/>	559	Tangerine Lavender Vanilla Bath Bomb	100	Variable Product	Equipment	+ Variations	Save

1) Choose Qb product

2) Choose the class

3) Click this

Please create the product with same sku in QB and then remap items

### Child products:

To view all the child products of a parent product, click on the “+Variations” button from the product listing and the following section will be displayed:

559	Tangerine Lavender Vanilla Bath Bomb	100	Variable product	Equipment	- Variations	Cancel
<input type="checkbox"/>	571	Tangerine Lavender Vanilla Bath Bomb-1	50	BBTLV	Select	Please create the variation with same sku in QB and then remap items
<input type="checkbox"/>	572	Tangerine Lavender Vanilla Bath Bomb-3-pack	24	BBTLV3	Select	Please create the variation with same sku in QB and then remap items

Save Variations

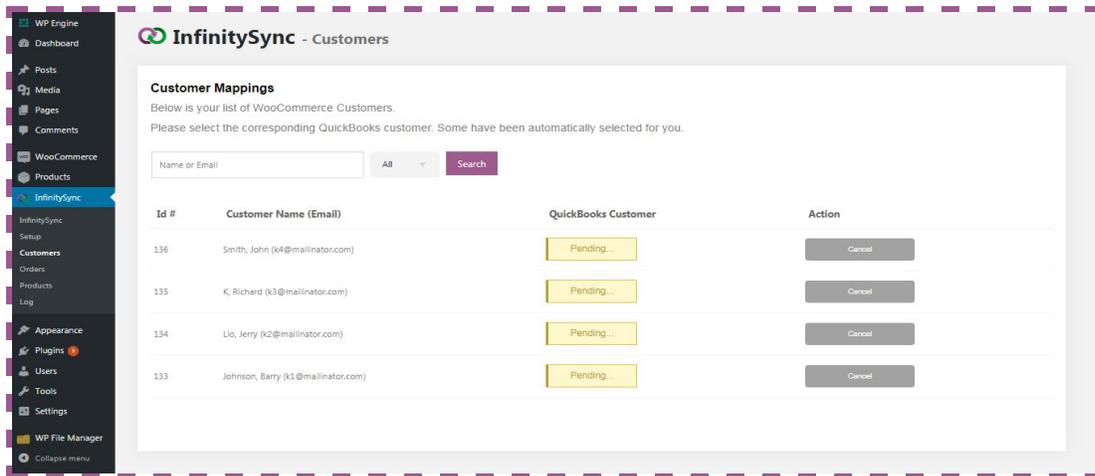
To map the child products,

- Select the QuickBooks child product from the dropdown menu
- Click on the “**Save Variations**” button.

# Customer Listing (All WooCommerce customers)

This section will display all the WooCommerce customers and the customer name within QuickBooks. This section has the following features:

- Ability to search the users
- Filter mapped vs unmapped customers
- Cancel customer mapping



The screenshot displays the 'InfinitySync - Customers' interface. On the left is a sidebar menu with options like WP Engine, Dashboard, Posts, Media, Pages, Comments, WooCommerce, Products, InfinitySync, and various settings. The main content area is titled 'Customer Mappings' and includes a search bar with a dropdown set to 'All' and a 'Search' button. Below the search bar is a table with the following data:

Id #	Customer Name (Email)	QuickBooks Customer	Action
136	Smith, John (k4@mailinator.com)	Pending...	Cancel
135	K, Richard (k3@mailinator.com)	Pending...	Cancel
134	Lio, Jerry (k2@mailinator.com)	Pending...	Cancel
133	Johnson, Barry (k1@mailinator.com)	Pending...	Cancel

# Taxes Listing (All WooCommerce Taxes)

This section has all the WooCommerce taxes. Once tax codes have been set in WooCommerce settings and an order has been placed with that tax, they will show up on this page.

 **InfinitySync** - Taxes

Once tax codes have been set up in WooCommerce settings and an order has been placed with that tax, then they will show up on this page.

Tax Id #	Country code	State code	WooCommerce Tax Name	QuickBooks Tax Name	Status
5	US	CA	WEBCA	WEBCA	Mapped
27	US	MT	WEBMT	WEBMT	Mapped



## Coupons Listing (All WooCommerce Coupons)

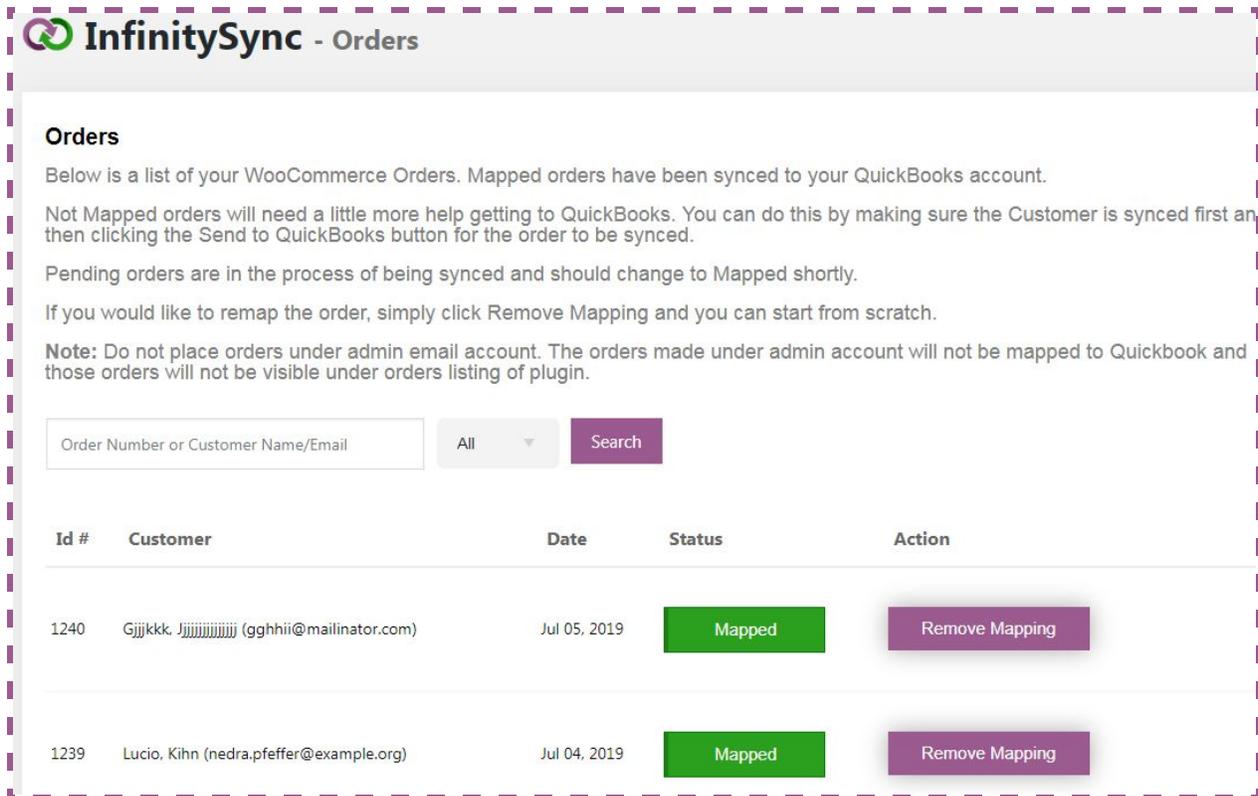
This section has all the WooCommerce coupons. Please note that, once coupon codes have been set up in WooCommerce and an order has been placed with that coupon, then they will show up on this page.

Coupon Id #	WooCommerce Coupon Name	QuickBooks Coupon Name	Status
589	5percent	5percent	Mapped
551	Father19	father19	Mapped
590	grebperproduct	grebperproduct	Mapped

# Orders Listing (All WooCommerce orders)

This section will display all WooCommerce orders made by the customers only. Please note that this section will not show orders made by users with roles other than customer.

**Note:** Do not place orders under admin email account. The orders made under admin account will not be mapped to QuickBooks and also will not be visible under orders listing.



**InfinitySync - Orders**

**Orders**

Below is a list of your WooCommerce Orders. Mapped orders have been synced to your QuickBooks account.

Not Mapped orders will need a little more help getting to QuickBooks. You can do this by making sure the Customer is synced first and then clicking the Send to QuickBooks button for the order to be synced.

Pending orders are in the process of being synced and should change to Mapped shortly.

If you would like to remap the order, simply click Remove Mapping and you can start from scratch.

**Note:** Do not place orders under admin email account. The orders made under admin account will not be mapped to Quickbook and those orders will not be visible under orders listing of plugin.

Order Number or Customer Name/Email  All

Id #	Customer	Date	Status	Action
1240	Gjjjkkk. Jjjjjjjjjjjjjjjjj (gghhii@mailinator.com)	Jul 05, 2019	Mapped	Remove Mapping
1239	Lucio, Kihn (nedra.pfeffer@example.org)	Jul 04, 2019	Mapped	Remove Mapping

All the orders will automatically get mapped/ synced to QuickBooks when a new order is made by the customer. Similar to the customer section, this section has the following features:

- Ability to search orders
- Filter mapped vs unmapped orders
- Unmap the orders