Authorize.net → QuickBooks Desktop

Installation Guide

Resources

[Commerce Sync Help Center](#)

Customer Support Contact Instructions
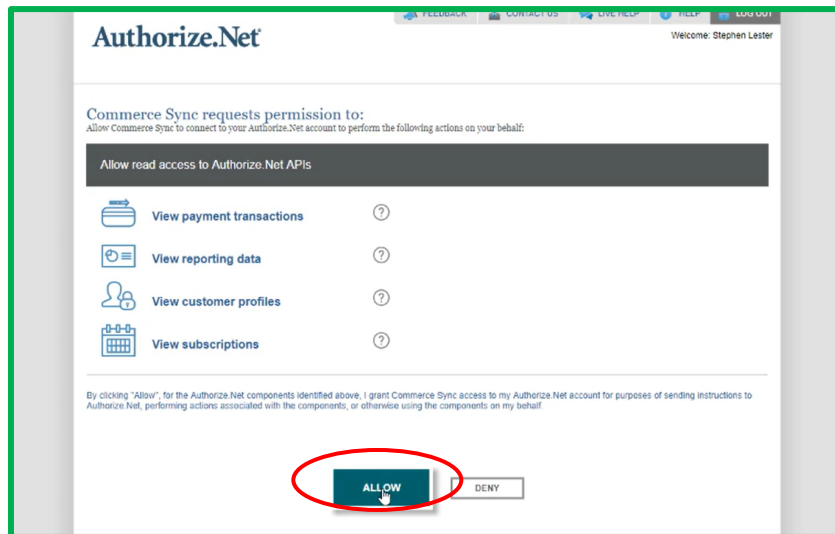- [Submit a Help Request](#)
- Email: support@commercesync.com
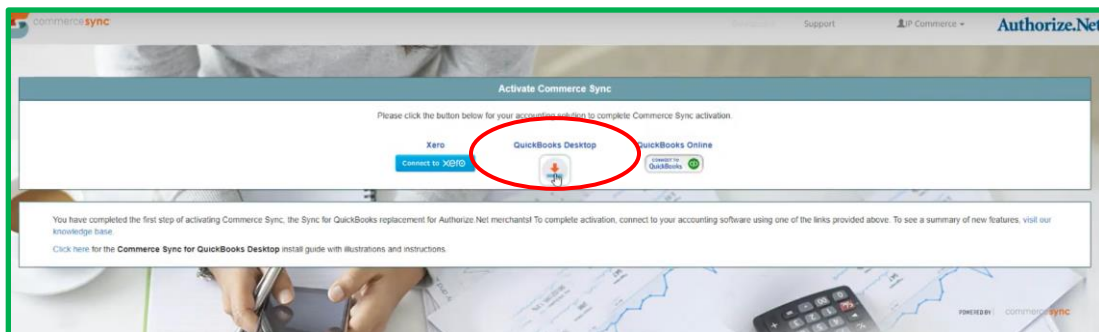
Before Installing

1. We recommend that you **reboot (turn off and then back on) the computer** that you are installing on, prior to installing.

2. You'll need to be **logged into the computer that has QuickBooks** and can access the company file for the installation.

3. The preferred browsers we'd like you to install with are **Chrome or Firefox**.

4. The **QuickBooks company file** you wish to sync transfers to **needs to be open** during installation.

5. You need to be **signed in as the Admin** and in **single user mode** in QuickBooks for the install to work properly.

6. Occasionally an **anti-virus and/or malware** systems block the installation of our app. **Disabling** these only for the duration of the installation can help.

7. We often see that if you **right-click to "Run as Administrator"** both QuickBooks and the Commerce Sync app, you'll see fewer issues during installation.
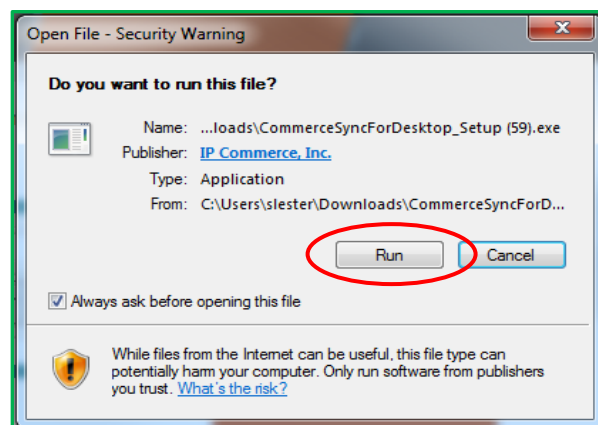
Installing Commerce Sync

1. Click HERE to begin activation – you will need to log in to Authorize.net as the account owner

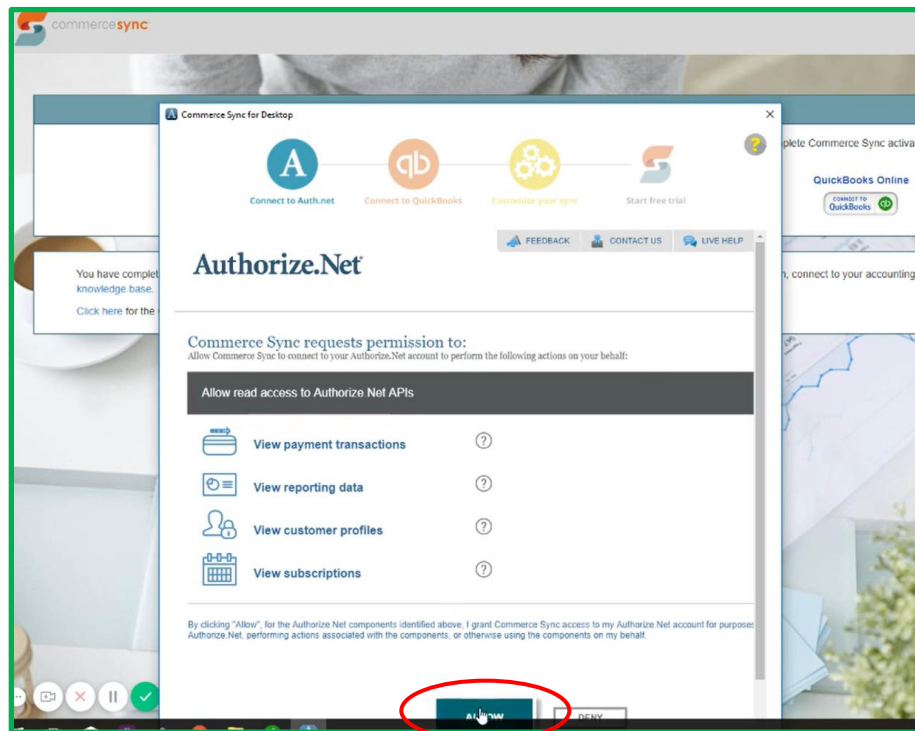2. Authorize Commerce Sync to access your account by selecting "allow" on the permissions page

3. You will then be redirected to the Commerce Sync Dashboard

4. You will be prompted to select your accounting software – click "QuickBooks Desktop" to begin the download
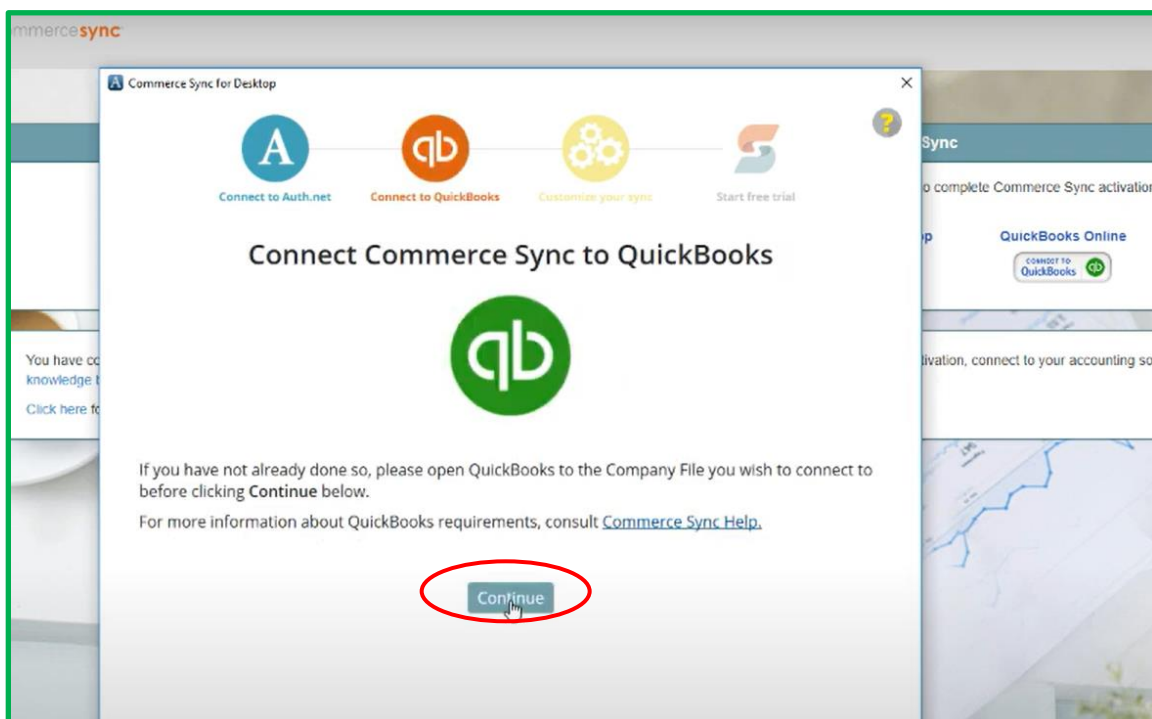

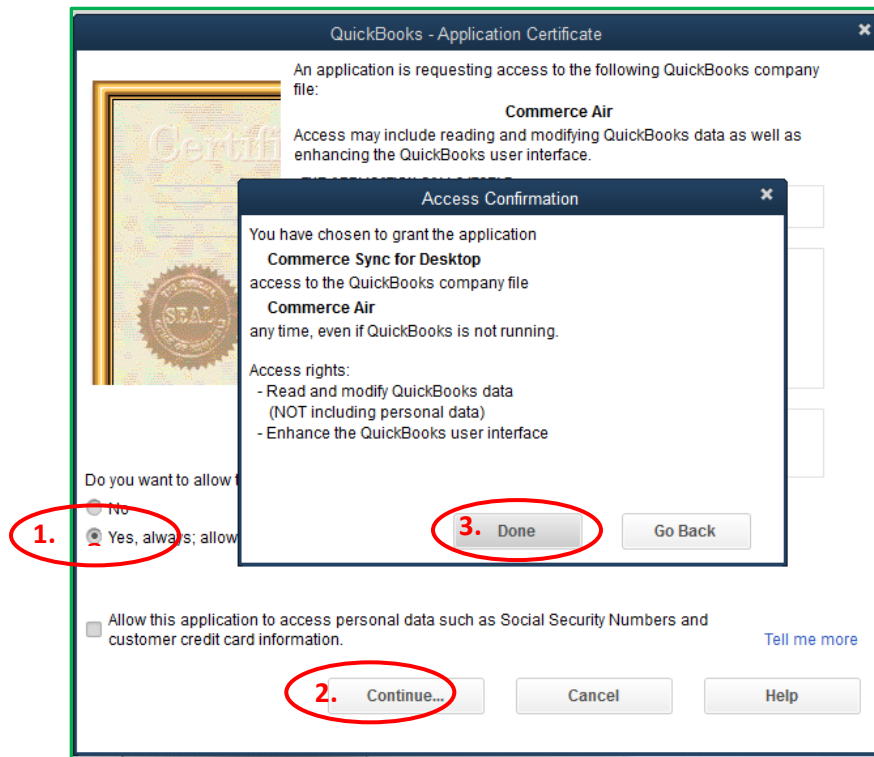5. Once the installer has finished downloading, open it and click Run

6. Once installed, you will be required to enter your Authorize.Net credentials (owner login required). From here, you will again be prompted to authorize access to your Authorize.net account – select "allow" on the permissions page:
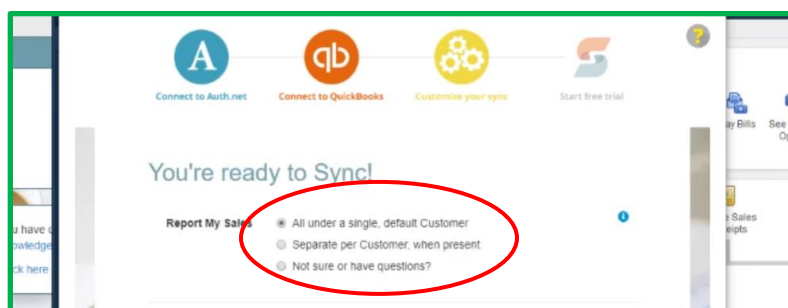

7. The next step will connect Authorize.net with QuickBooks; please ensure that you have QuickBooks and the company file that you wish to connect open, and then click "Continue"
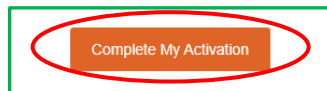
8. In QuickBooks, you'll see a pop-up:

    a. check the box next to "**Yes, always allow**"

    b. then select "Continue."(sometimes this screen is **hidden behind other QuickBooks windows**; if you don't see this screen minimize your other QuickBooks windows to find it)

    c. Select "Done" on the second pop-up

9. Select your settings for the transfer:

    a. ***Single Income Account*** (Single, default customer) – sales will be transferred as a daily summary; this summary will be transferred as an invoice with one line item, into a single, generic Income Account in QB Desktop

    b. ***Separate Income Accounts Per Sales Category*** *(Separate per Customer)* – sales will be broken down by the categories that are set up in your POS; this will transfer as an invoice with a line item for each category to a separate Income Account for each category

10. Select the button **Complete My Activation**

11. When prompted, please enter your billing information and click "Start my free trial"

12. At this time, we recommend opening the Commerce Sync for Desktop app up immediately and waiting for the sync to complete. The green arrows will stop spinning and the next sync timestamp will be showing; once the sync is complete, go to the Commerce Sync Web Dashboard and review your settings.

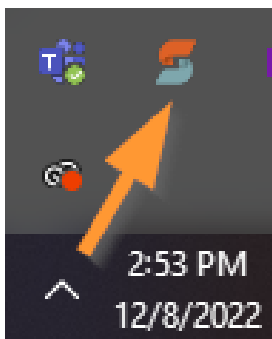13. Your activation is now complete!

After Installation:

You'll see your first transfer take place tomorrow. If you now need to get caught up on any past sales, you can purchase historical transfers here:

Request Historical Sales

Going forward, each day Commerce Sync will transfer all of your sales information for the previous day to QuickBooks Desktop. **This transfer will occur after midnight** to ensure that all orders for the day are closed.

Commerce Sync is now installed in your Authorize.net account and on your computer. To open the Commerce Sync app installed on your computer, open the shortcut from your desktop system tray.