QuickBooks (TradeGecko)

QuickBooks Setup Guide

Obtaining the API keys from QuickBooks

Visit this page to acquire the credentials to set up your sales channel. Our page provides step-by-step guidance on obtaining these credentials, which are essential for the setup process.

Installing the QuickBooks Sales Channel

To add the QuickBooks sales channel to your Channels account, kindly adhere to the following steps:

1. Access your account and go to the left side of the screen. Click the "Stores" button.
2. If you already have a store, click "View Store" on the right side of the screen to access it.
3. To edit an existing store, click the edit button on the right side. If you need to create a new store, click "+ ADD" above, name it, and use the edit button to make changes.
4. Click "+ ADD" in the Channels section to begin the installation.
5. A window will appear in the centre of the screen. Choose "QuickBooks" from the available channels list.
6. Provide the required information:
   - **Channel Name:** In the field provided, you can enter any name. However, it is recommended that you choose a name that has meaning to you, such as "QuickBooks," as it will serve as an apparent reference for the source of the order in the future.
   - **App ID & Secret:** Please enter the information you obtained through your QuickBooks platform earlier.
   - **Order & Fulfilment & Payment Statuses:** Select the type of orders you want to integrate this channel with.
7. After filling out the fields, customize other options, then click "Save" in the bottom-right corner.
8. Click the "Connect" button and authorize the connection by following the instructions.
9. You'll be back in the recently installed channel. Activate it at the top of the screen using the "Is Active" button.

Congratulations! You've successfully set up your QuickBooks sales channel on Channels. You can now sell products on QuickBooks and manage orders from your Channels dashboard.

Revision #1
Created 31 May 2024 09:24:28 by Despatch Cloud
Updated 6 June 2024 06:46:26 by Despatch Cloud