

Connex

Automating Drop Shipping in QuickBooks



CEO and Founder of Sync with Connex.

I have worked with QuickBooks for over 12 years. I created Connex for QuickBooks in 2011.

I have helped set-up hundreds of companies with QuickBooks Desktop.



What is the workflow?



I ordered a desk from a furniture store. The store created a sales order because the item was built on demand.

I paid a deposit. Three months later, the desk arrived. The store invoiced me, and I made payment.

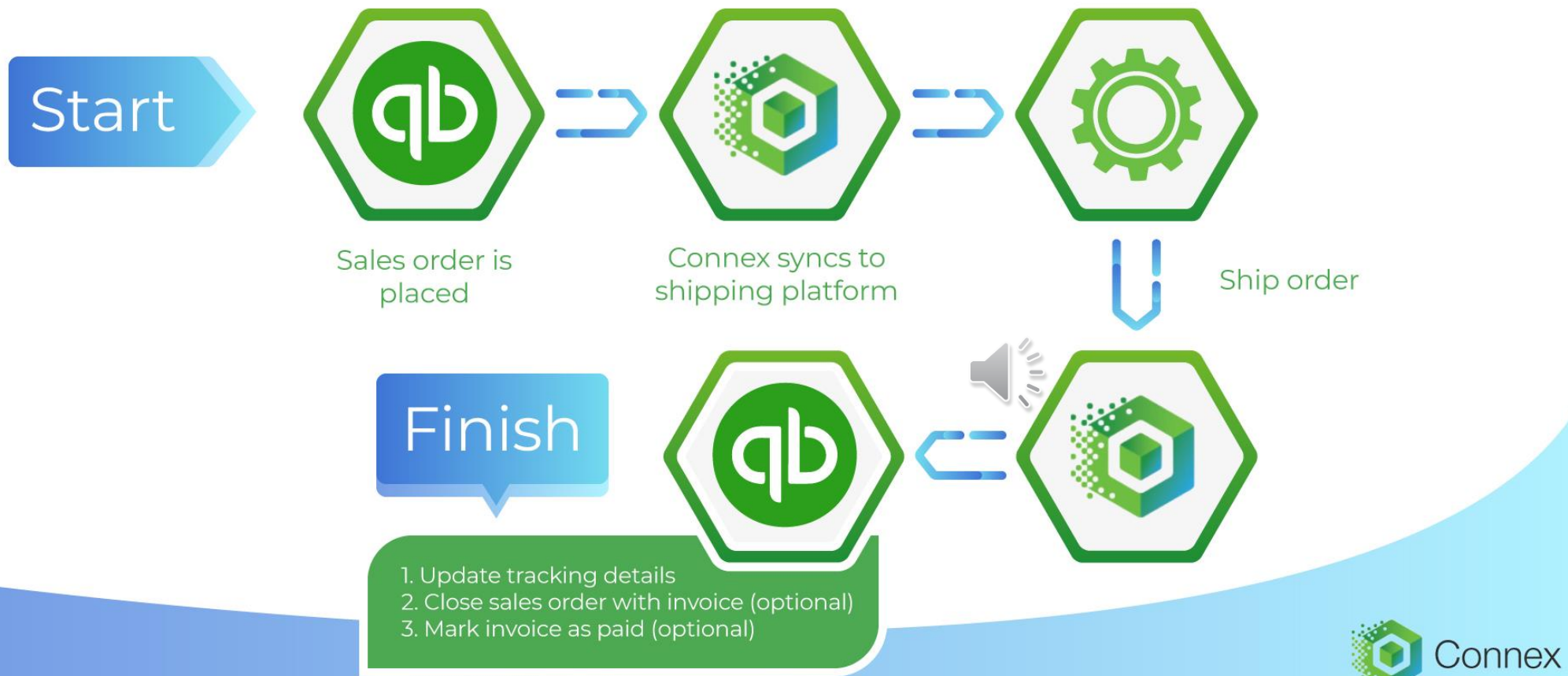




What is the **technology stack**?



How to automate dropshipping with QuickBooks Enterprise.



Technology Stack

Invoice [See History](#)

DATE: 04/14/2021
INVOICE #: 18

BILL TO: Joe Example
123 Main St.
Watertown, MA 02472

SHIP TO: Joe Example
123 Main St.
Watertown, MA 02472

S.O. NO.: 19 P.O. NO.: TERMS: SHIP DATE: 04/15/2021

ITEM	DESCRIPTION	ORDERED	PREV. INVOIC...	BACKORDE...	INVOICED	RATE	AMOUNT	TAX
test item	This is a test item.	1	0		1	100.00	100.00	Tax
shipping	Method: UPS Ground Tracking: 1Z9999999999999999					10.00	10.00	Tax



Updated invoice with tracking details



Another popular flow is sync order before shipment to QuickBooks, ship it, and close with invoice with optional payment



Syncing sales orders, invoices and payments



Connex can create a sales order prior to shipment. After, Connex can close the sales order with an invoice.



**Connex can sync payments.
If the payment exists prior
to the invoice, we can
associate them if the
reference or memo field
matches the invoice.**



Main Formatting Reports Search

Find New Save Delete Memorize Mark As Closed Print Email Print Later Email Later Attach File Create Invoice

CUSTOMER:JOB Joe Example TEMPLATE Custom Sales Order

Sales Order

DATE 04/13/2021

S.O. NO. 18

NAME / ADDRESS
Joe Example
123 Main St.
Watertown, MA 02472

ITEM	DESCRIPTION
test item	

Create Invoice Based On Sales Order(s)

Specify what to include on the invoice.

Create invoice for all of the sales order(s)

Create invoice for selected items.

OK Cancel Help

Close sales order with invoice



CUSTOMER:JOB **Joe Example**

Custom Sales Order

> Joe Example
Customer Transaction

Sales Order

✓ INVOICED IN FULL

NAME / ADDRESS: Joe Example
123 Main St.
Watertown, MA 02472

SHIP TO: Joe Example
123 Main St.
Watertown, MA 02472

P.O. NO.

ITEM	DESCRIPTION	RATE	AMOUNT	TAX	INVOICED	CLSD
test item		100.00	100.00	Non	1	✓

SUMMARY

- Open balance
- Active estimates
- Sales Orders to be invoiced

RECENT TRANSACTION

- 04/13/21 Invoice - Paid
- 04/13/21 Payment
- 04/13/21 Sales Order

Paid invoice that closed sales order

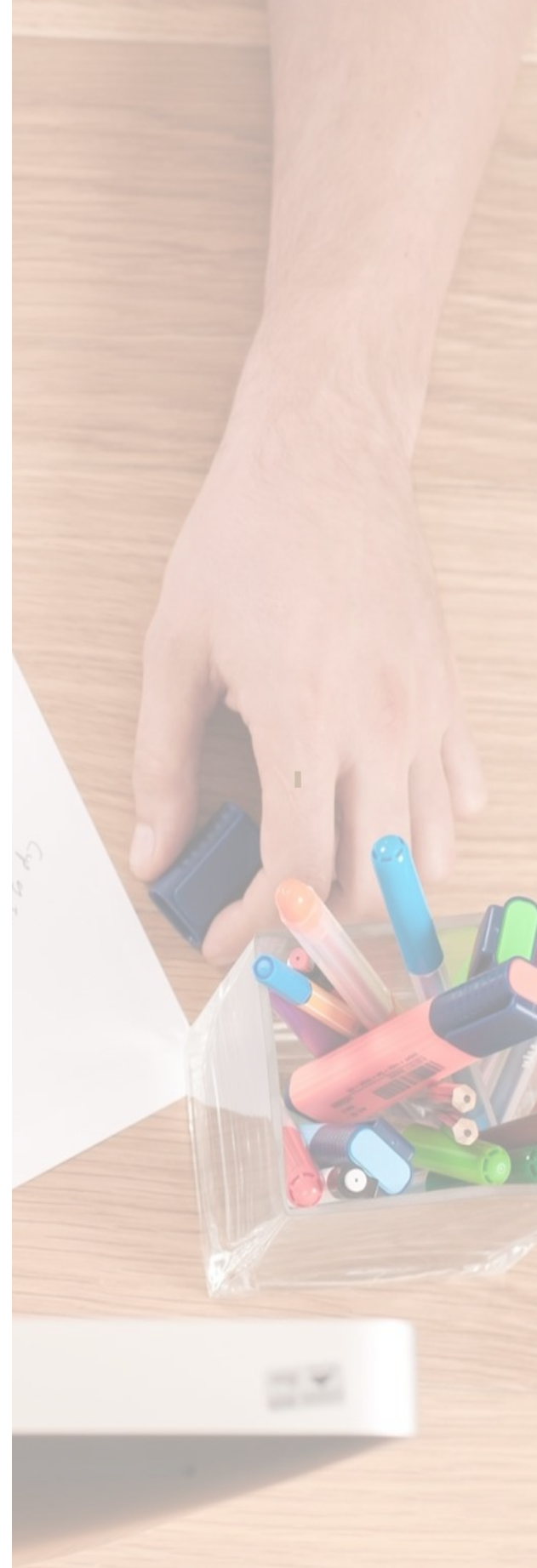




**How do I close sales orders, if
the order has shipped?**



We add the sales order, invoice, and payment out of box. You can add a rule that says only sync the invoice, when it ships.

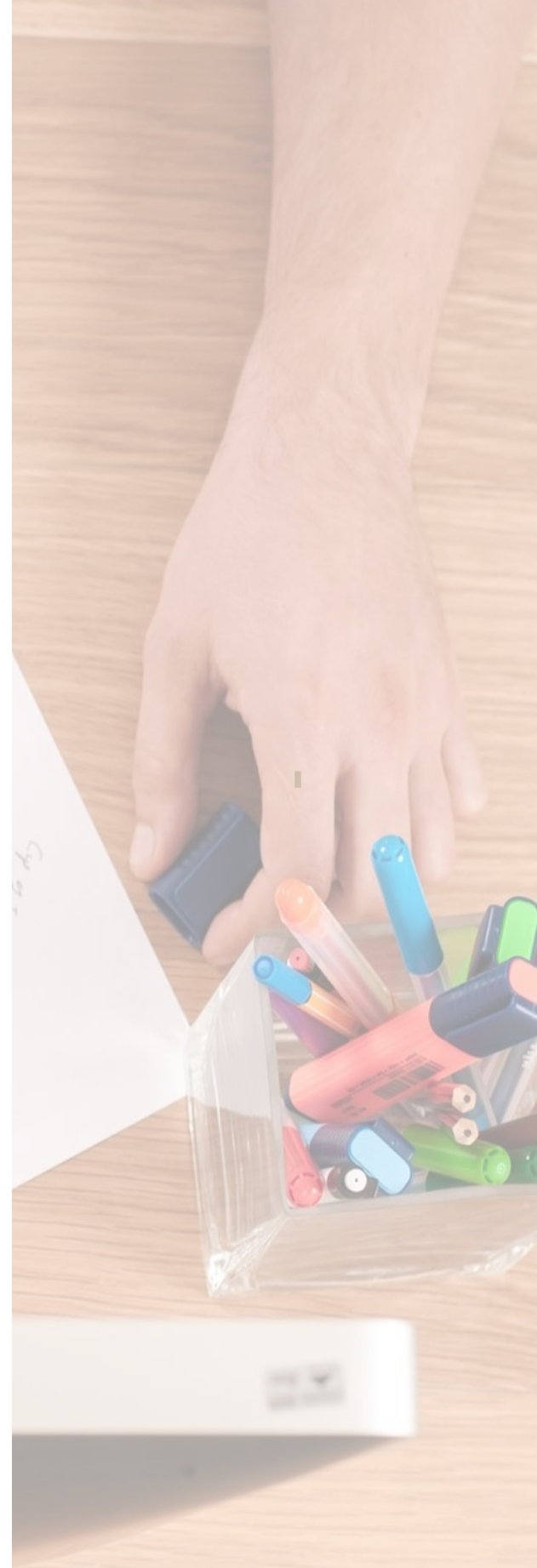


Order Statuses to Export:

awaiting_shipment x

shipped x

Login to Connex. Click manage. Expand orders > sync orders to QuickBooks > sync manually to QuickBooks. In the order status field, enter shipped and another status.

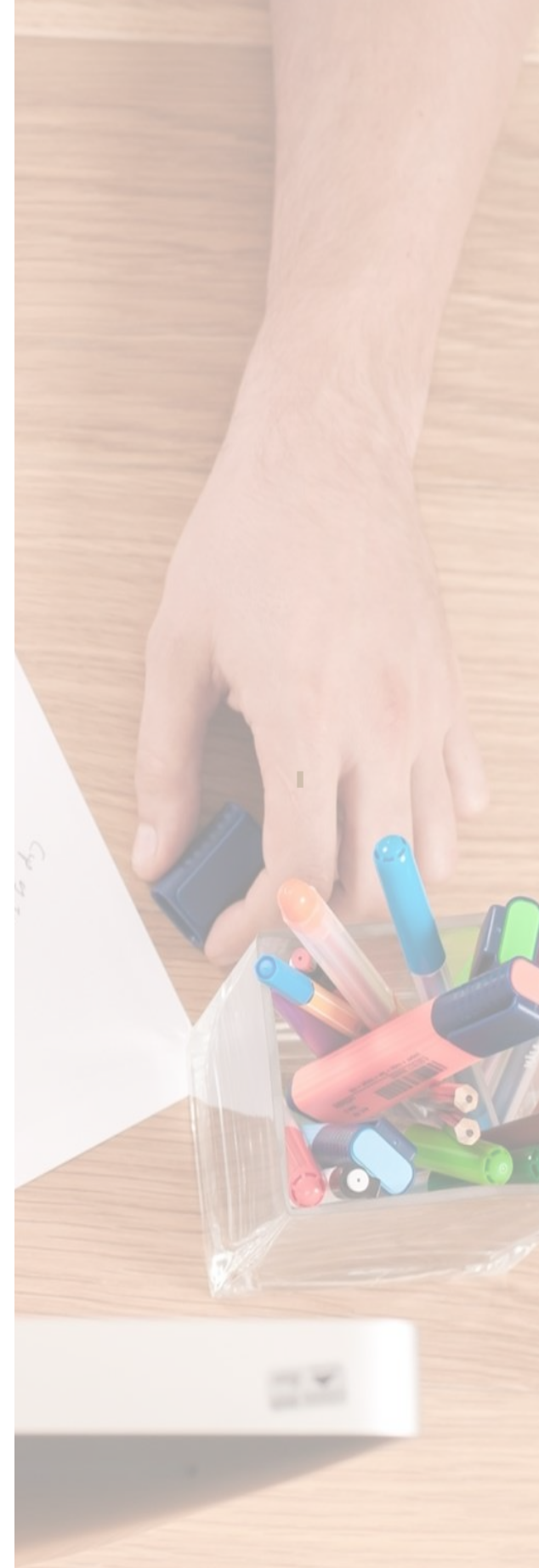


Transaction

Transaction Type: ?

Sales Orders, Invoices, and Payments If Paid

**Expand orders > sync
orders to QuickBooks >
transaction. Choose sales
orders, invoices, payments
if paid.**



Add Rules



Add Rule Name



Perform Action



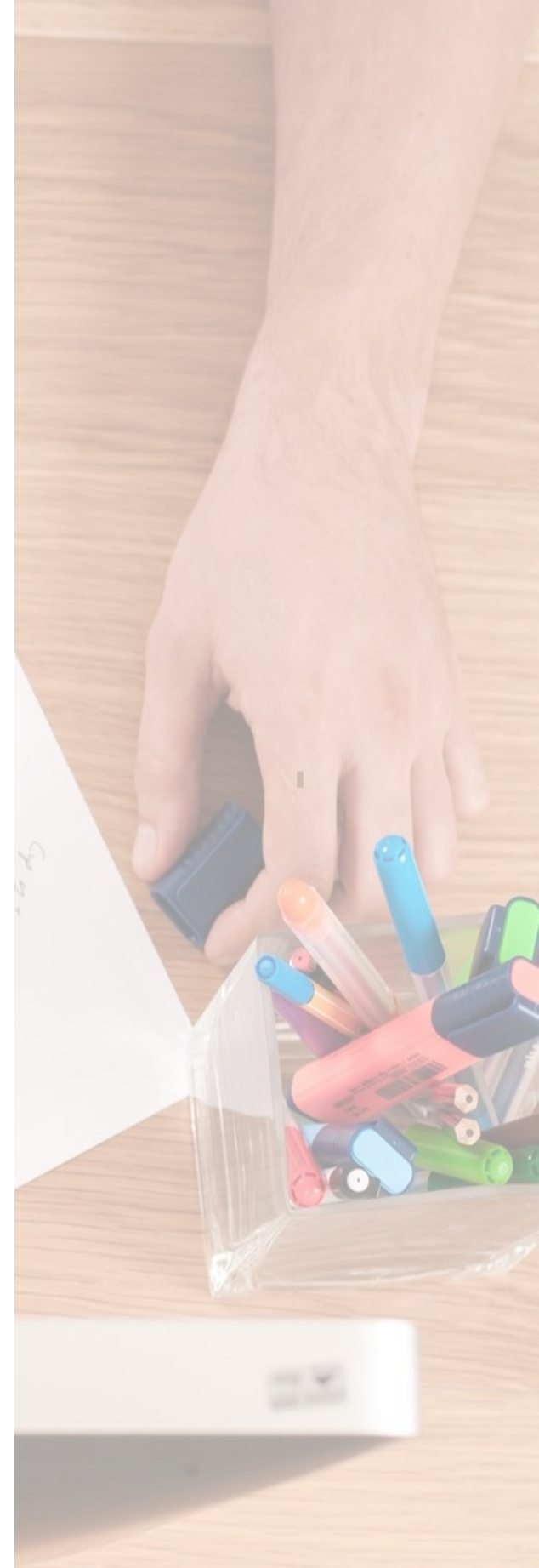
Conditions

Action:

Import No Invoice to Close Sales



**Go to the rules engine.
Click add. Choose import
no invoice to close sales.**



Edit ×

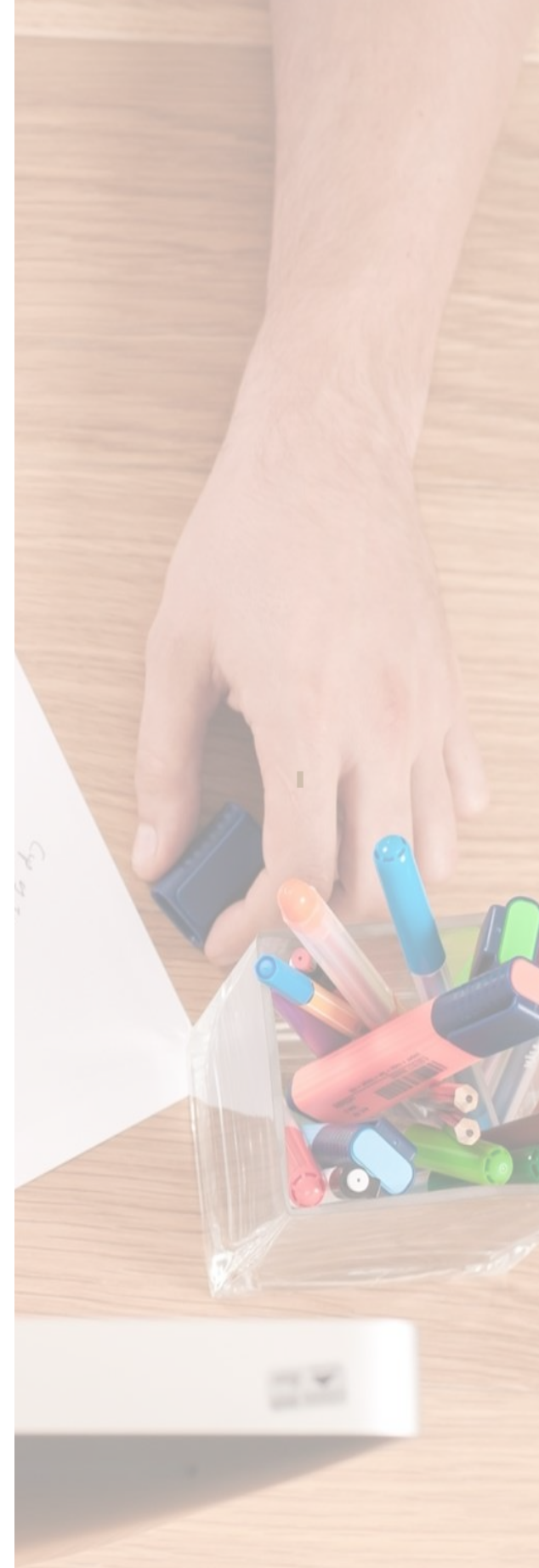
Field

Map From

Comparison

Conjunction

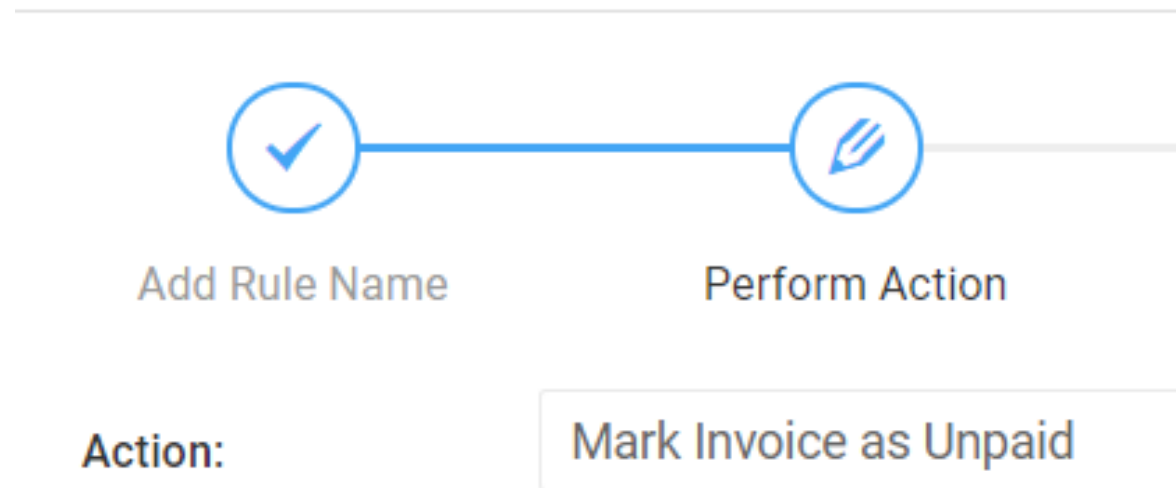
If the order is unshipped create no invoice. For Shopify users, enter fulfilled. Click finish.



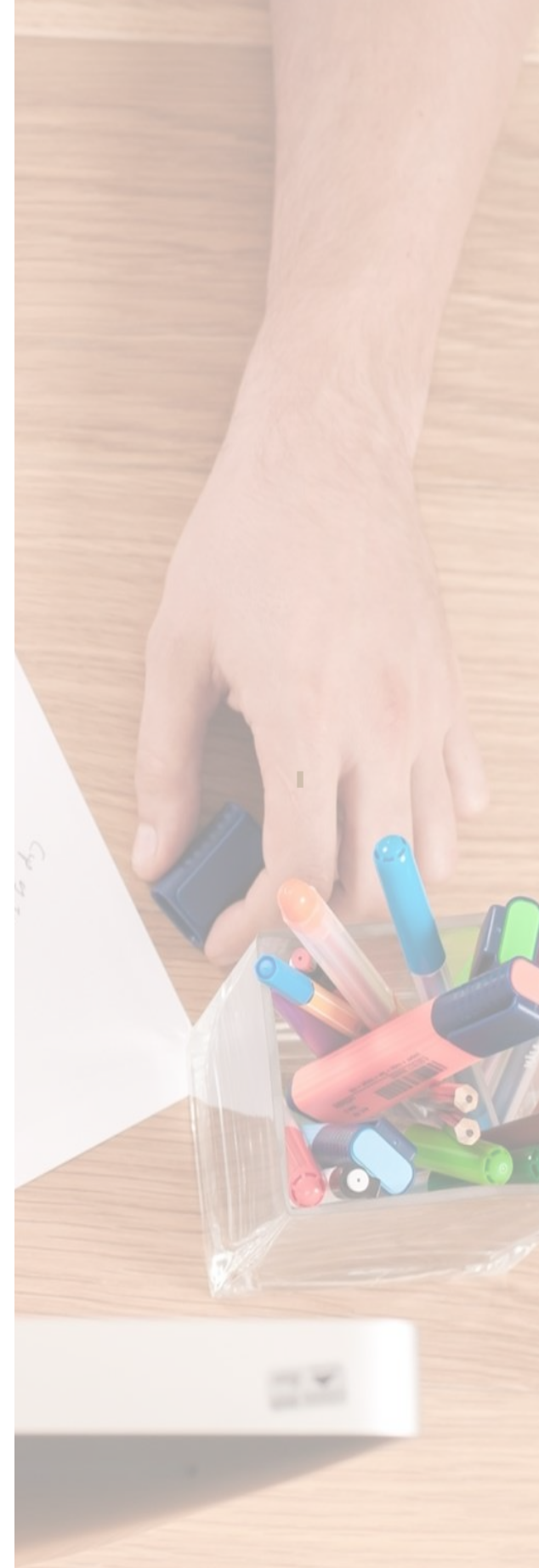


Can I sync a sales order and invoice without payment?



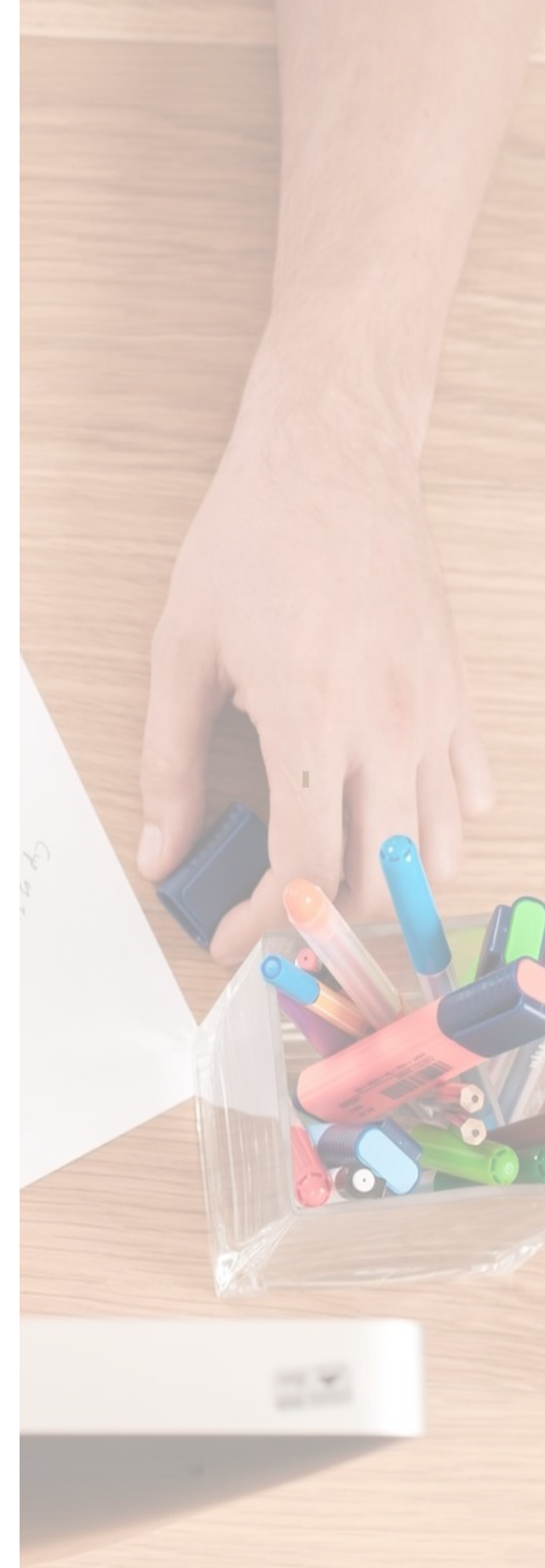


We sync sales orders as fully paid by default. Go to the rules engine. Choose start from scratch. Choose mark invoice as unpaid.




Field	Selling Channel
Map From	Open Orders (QuickBooks)
Comparison	Equals
Conjunction	OR

Next, specify a sales channel where you sync orders from QuickBooks. This ensures orders from other channels are paid.



Summary

- Connex can help automate drop shipments. 
- Connex can create sales orders, invoices, and payments if paid.
- Our tool can close sales orders, if the order ships.



**I still experience sync issues.
How do I contact you?**

