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.

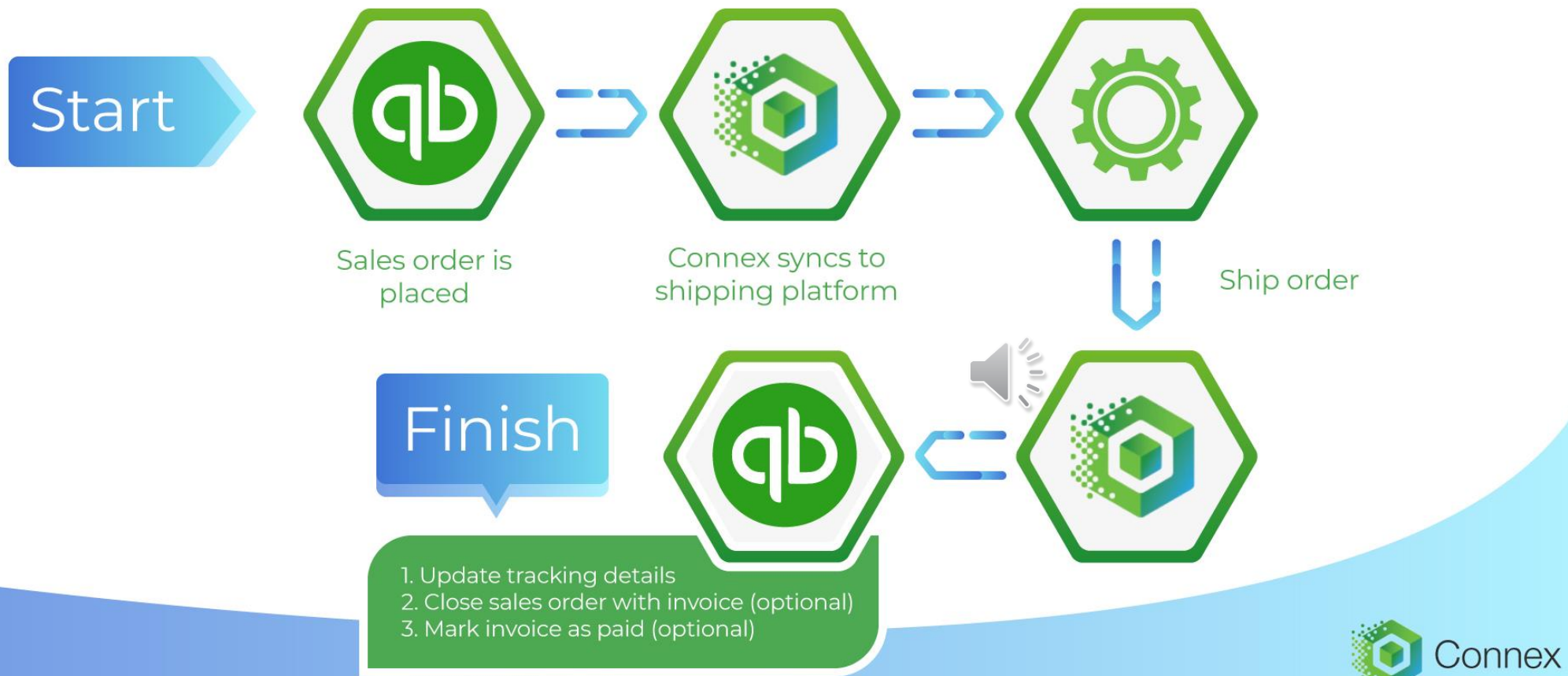# I paid a deposit. Three months later, the desk arrived. The store invoiced me, and I made payment.

Connex

What is the technology stack?

How to automate dropshipping with QuickBooks Enterprise.

Start → Sales order is placed → Connex syncs to shipping platform → Ship order → Finish

Finish:
1. Update tracking details
2. Close sales order with invoice (optional)
3. Mark invoice as paid (optional)

Technology Stack

Updated invoice with tracking details

Connex

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

Connex

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

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.

Connex

Close sales order with invoice
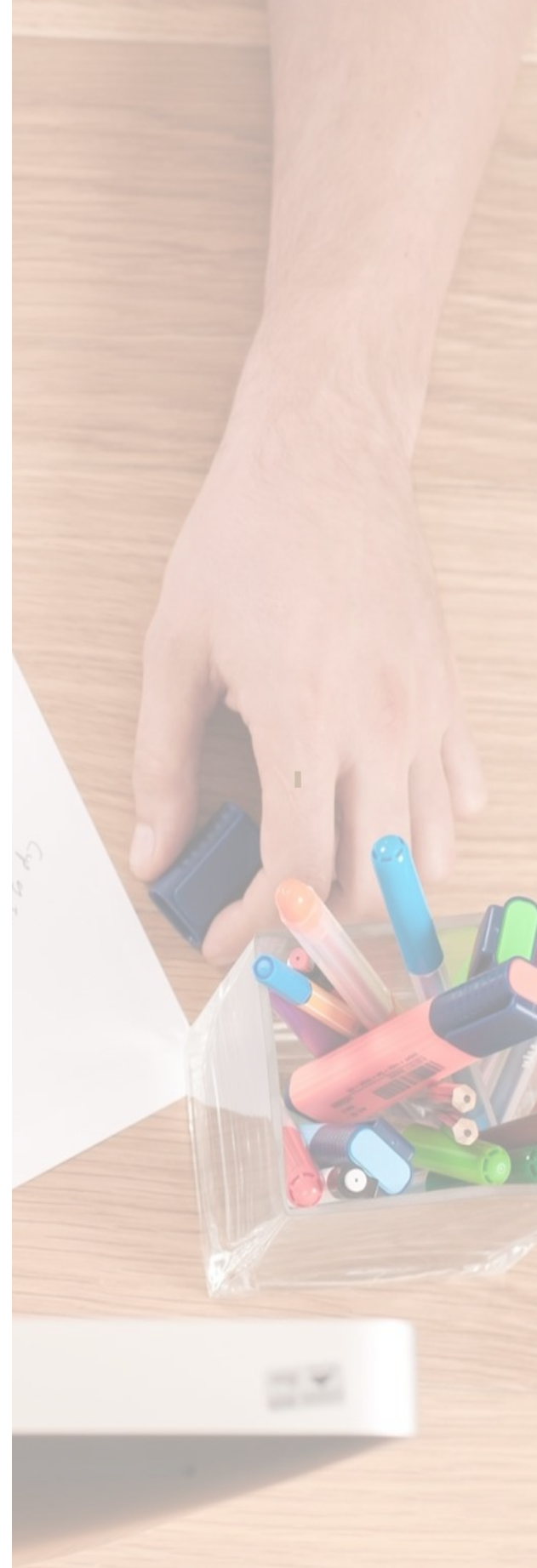
Connex

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.
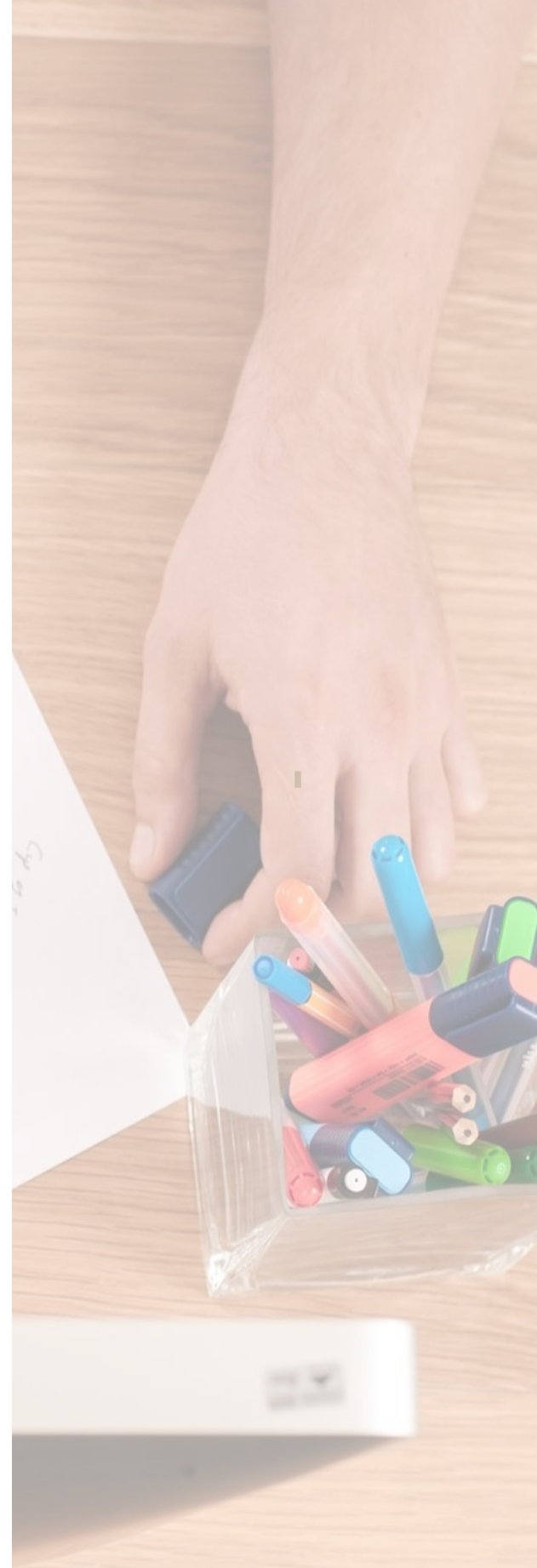
Order Statuses to Export:

awaiting_shipment ×   shipped ×

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.
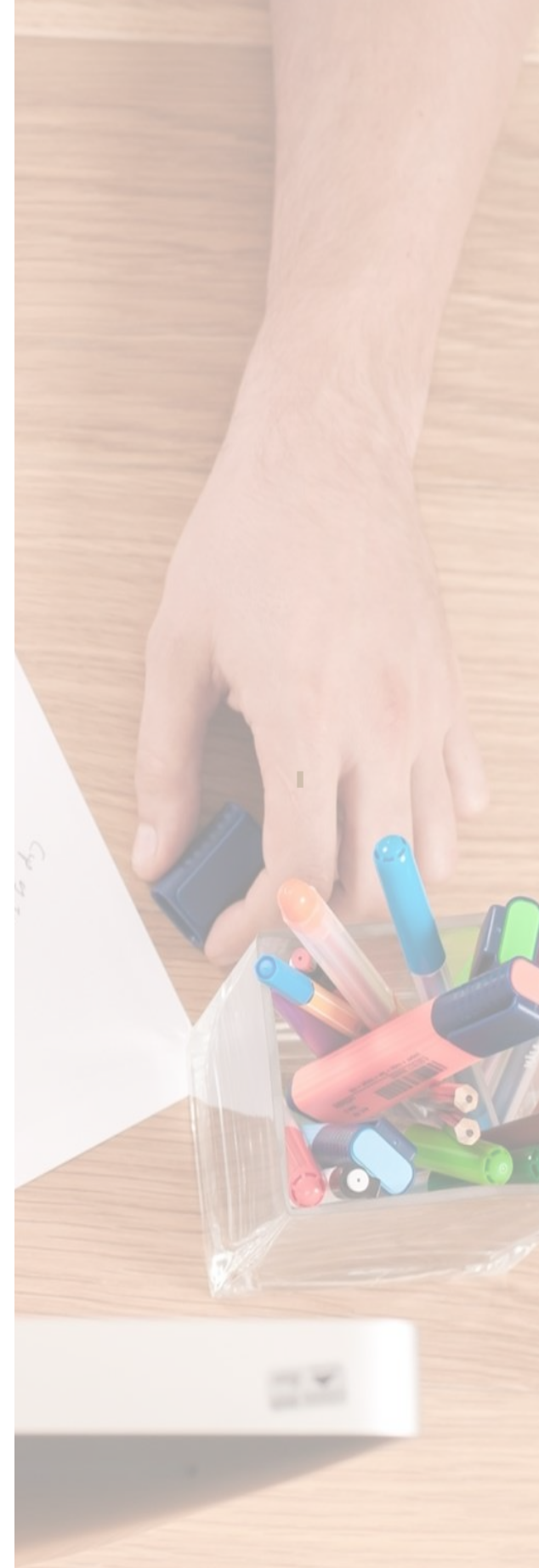
Transaction

Transaction Type: ?

Sales Orders, Invoices, and Payments If Paid

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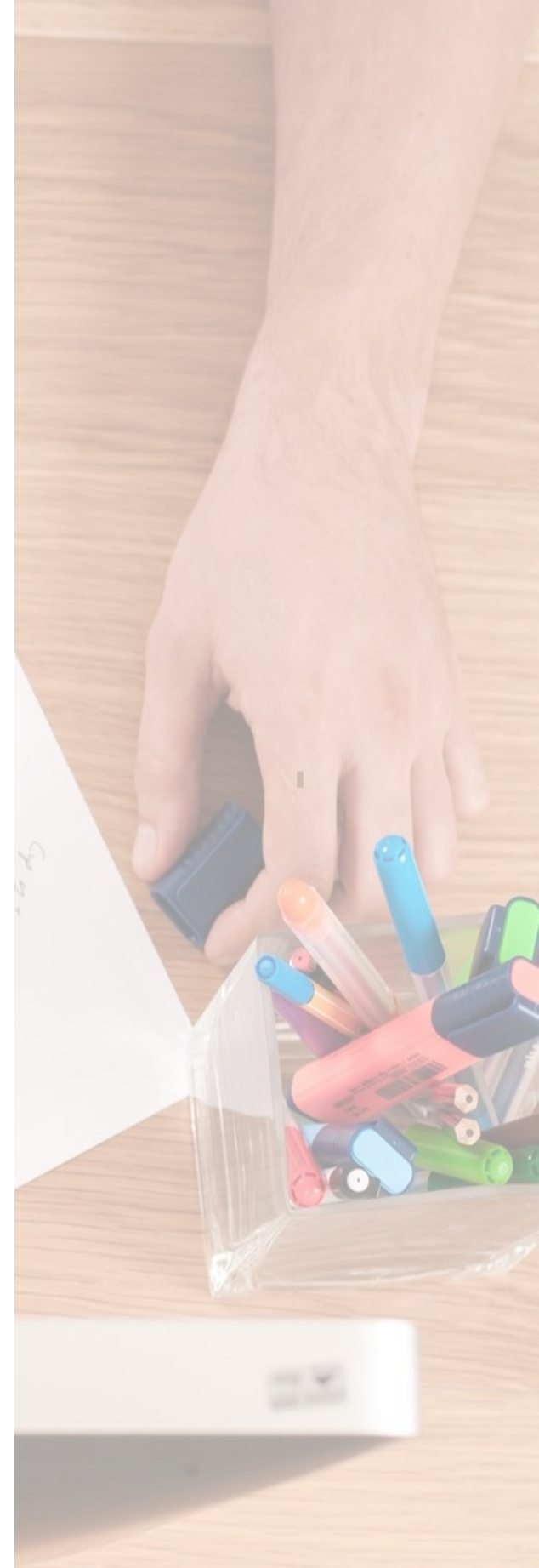
Connex

Add Rules

Add Rule Name — Perform Action — Conditions

Action: Import No Invoice to Close Sales

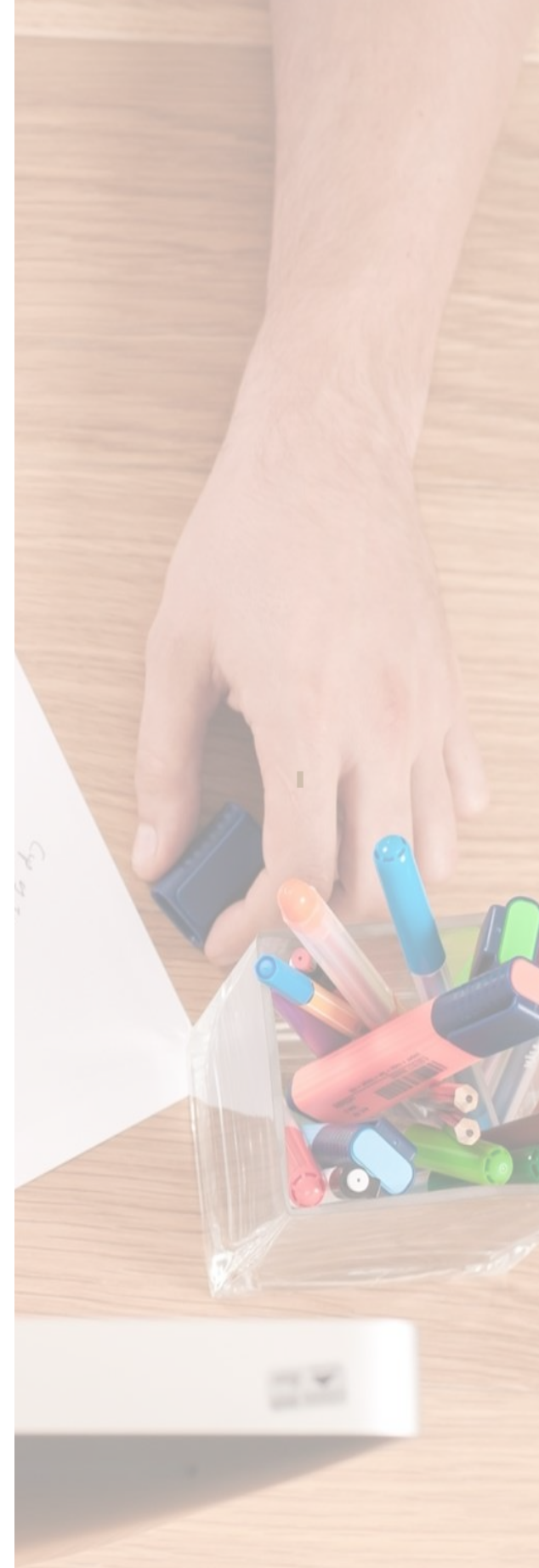**Go to the rules engine. Click add. Choose import no invoice to close sales.**

Connex

Edit   ✕

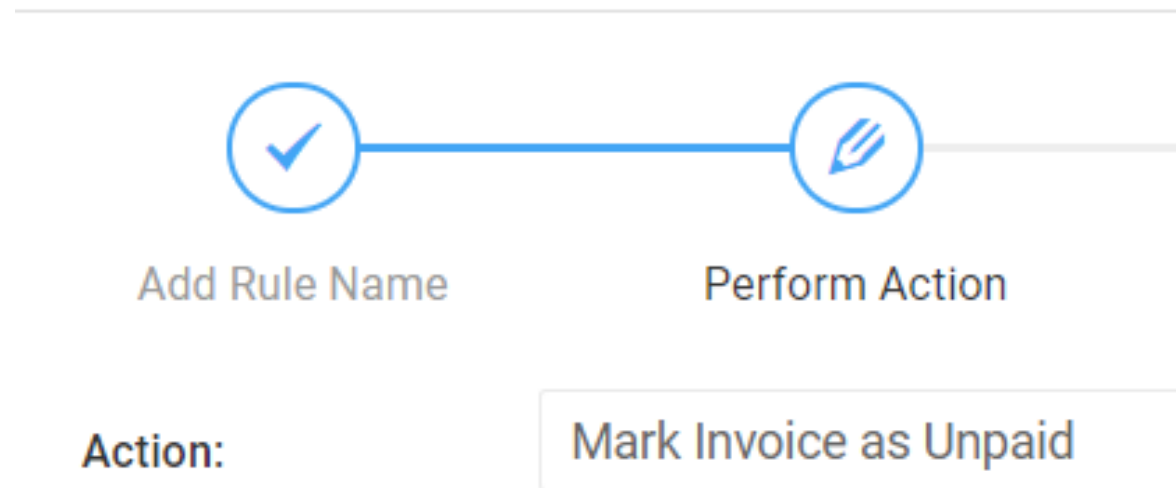| Field	Order Status ▼
Map From	shipped
Comparison	Is Not ▼
Conjunction	OR ▼

✓ Update   ⊘ Cancel

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?

Add Rule Name ✓ ─────── Perform Action ✐

Action: Mark Invoice as Unpaid

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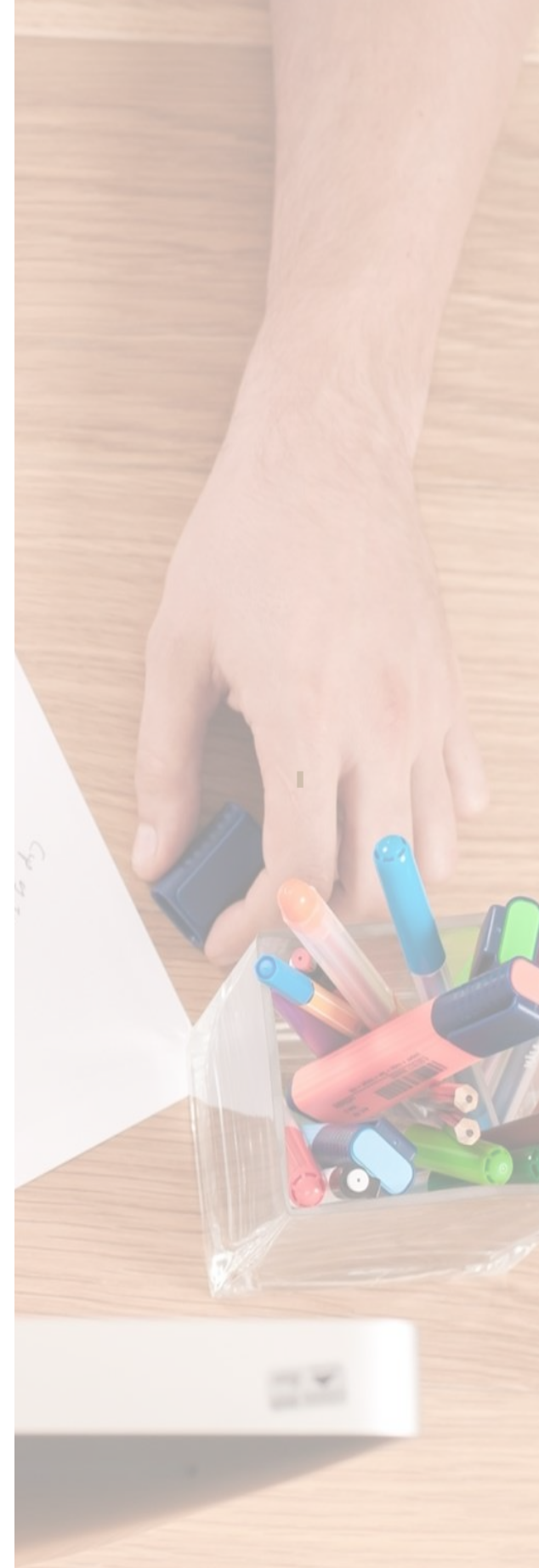
Connex

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.
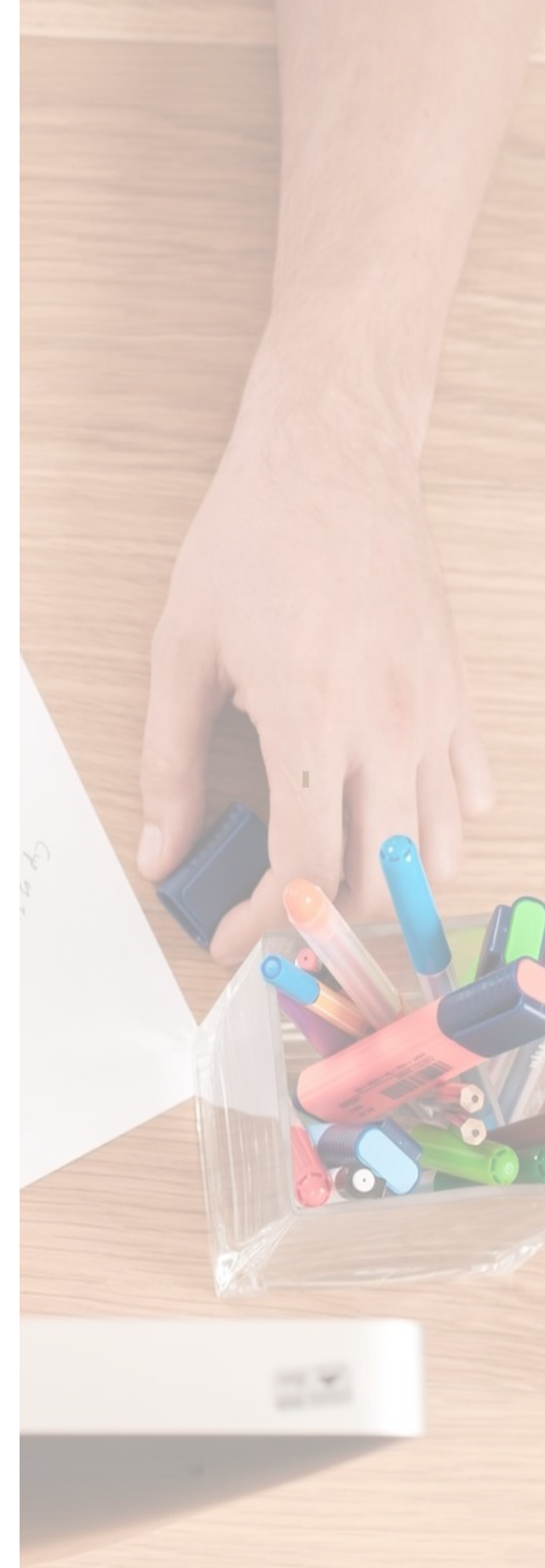
Summary

- 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?