

Connex

Connex for QuickBooks Rules Engine



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 its purpose?



You can dynamically change field mapping, based on a scenario: if the SKU matches, if the payment method is PayPal, map all coupon codes to discount.

You are selling on Amazon. You have multiple listings for one SKU. You want all of the listings to match a single product.

**Without the rules engine,
there would be many
settings or the fields would
remain static. This would
reduce the automation that
we supply.**

The rules run before orders sync to QuickBooks, but after orders are synced from your website. If Connex was a sandwich, your website and QuickBooks are the two slices of bread. The rules are in between.




**With the rules engine,
you can perform all
mappings in one area
and save time.**



What are the rule parts?





**A rule has many parts: name
action, map from, map to,
comparison, and conjunction.
Let's go over the different
parts in more detail.**

The name field is arbitrary and it just lists the name of a rule for reference purposes.

The action field performs the action. Do you want to map a SKU? Map an order number or map a shipping method?

Map from is what the data look like. On order 123, the SKU is ABC.

Map to is how you want the data to appear. If the SKU is ABC and QuickBooks product is ABC-1, then the map to is ABC-1.

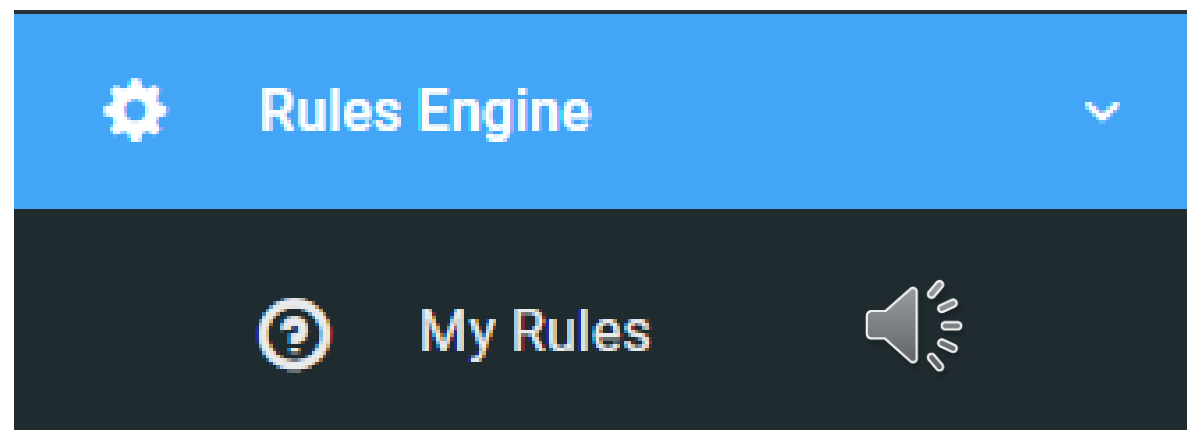
Comparison is usually equals or matches. Map the SKU to ABC-1, if the SKU matches ABC. The word matches is a comparison.

Conjunction allows you to chain rules together and I will discuss this area in more detail later.

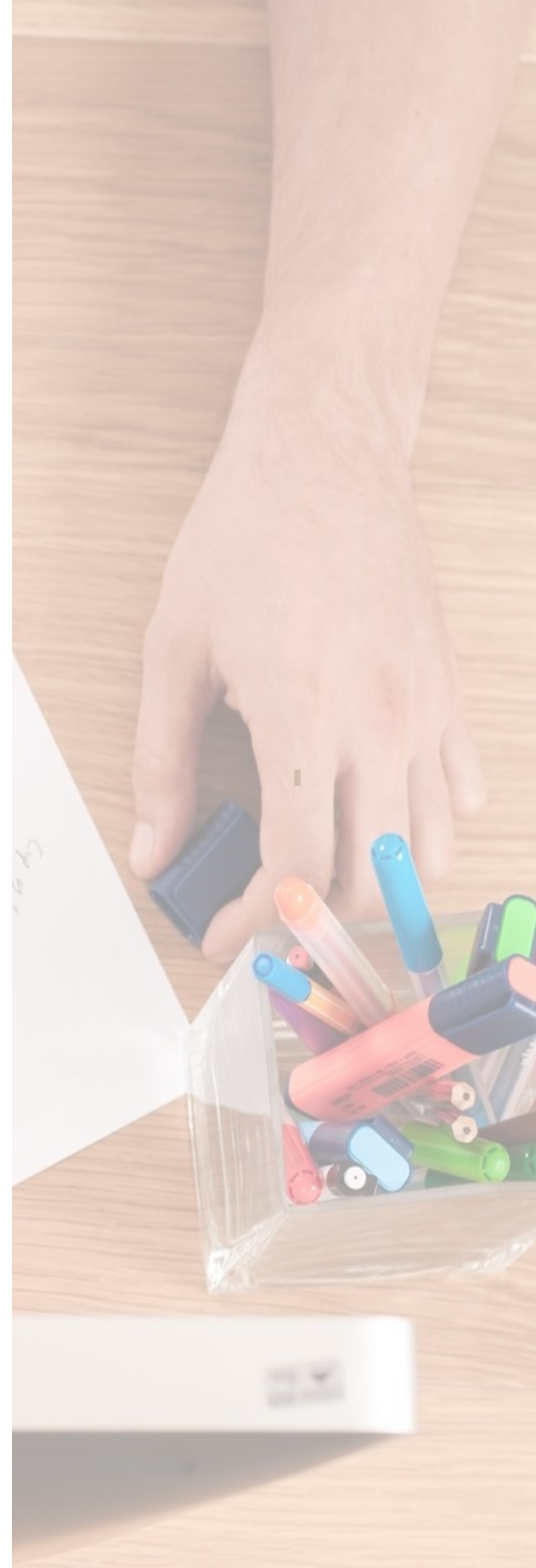


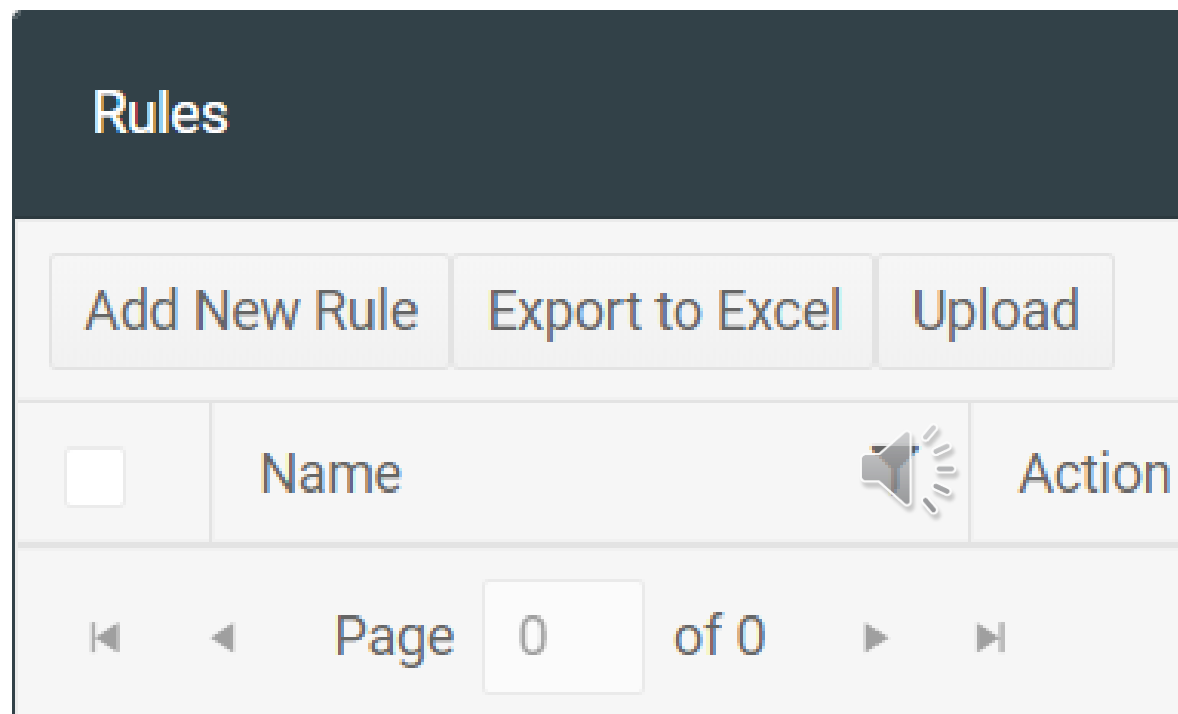
How do I add my first rule?



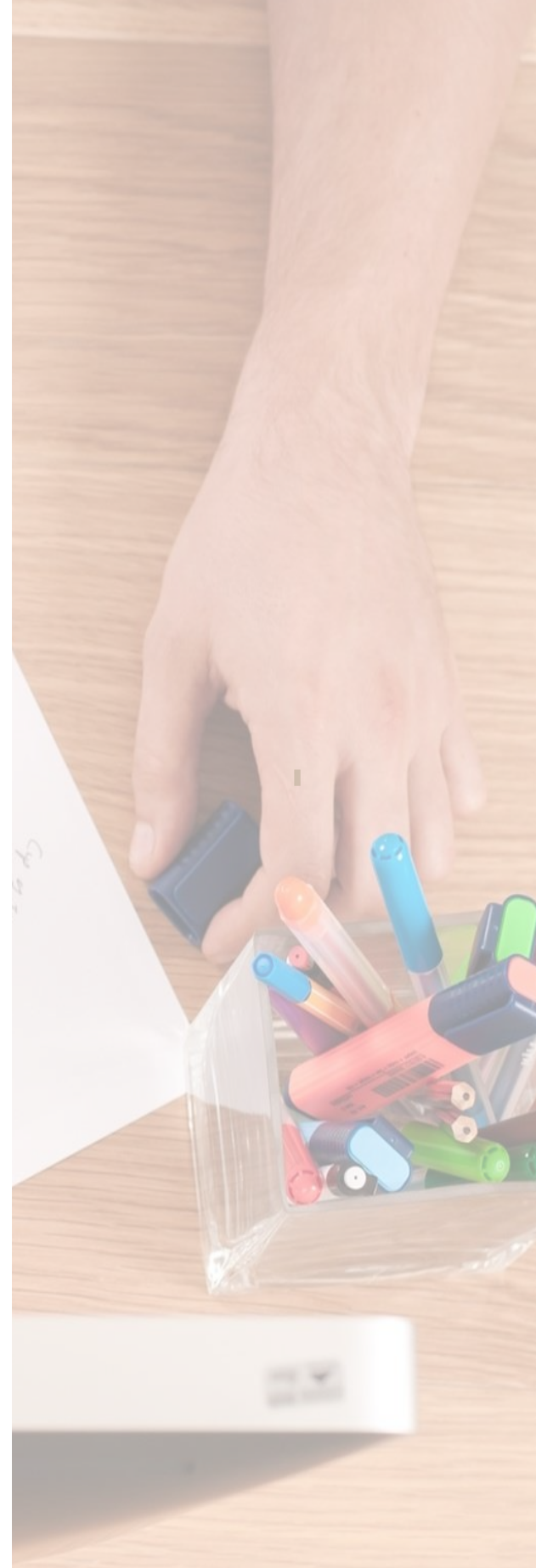


On the left, click rules engine and my rules.






On the rules grid, click add new rule.



Templates



Choose a template or start from scratch

Template:

Start from Scratch

Start from Scratch

Map SKU


Map Currency Code

Map Custom Field

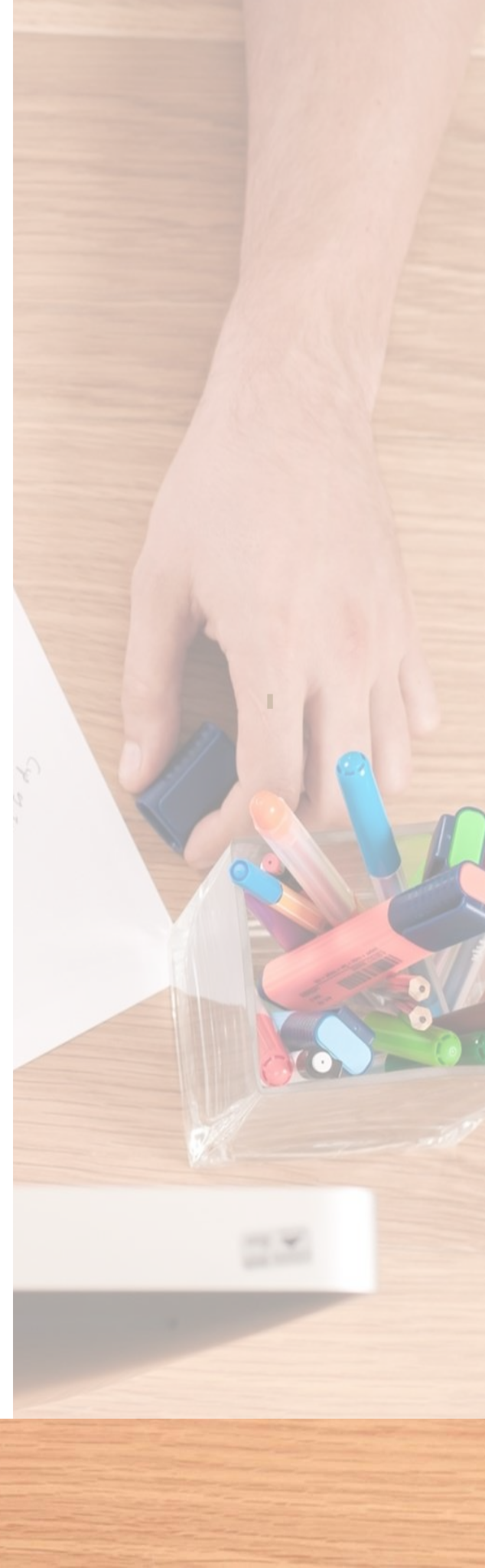
Map Deposit Account

Map Discount Code

Map PO Number




Choose a rule template. In this case, let's choose SKU. Rules have many parts and these templates will add most fields.



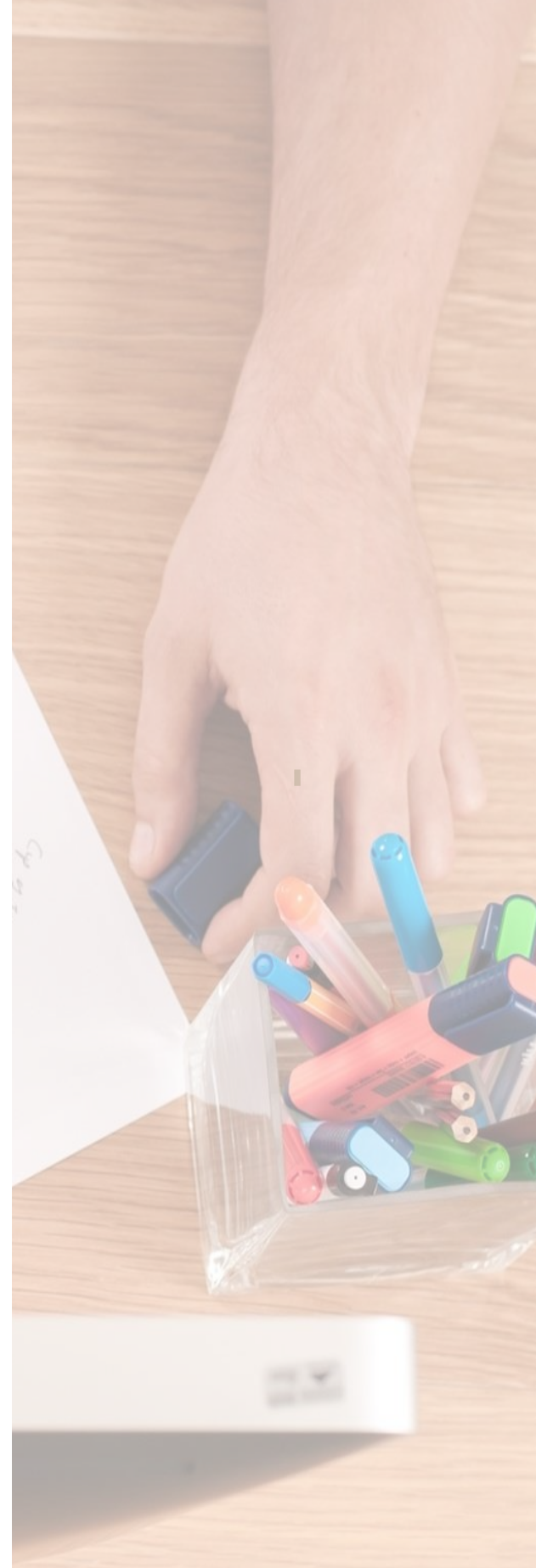
Add Rules

Progress bar with 6 steps: 1. Add Rule Name (active), 2. Perform Action, 3. Conditions, 4. Map Value, 5. Overview, 6. Test Rule.

Rule Name:

 [< Previous](#) [Next >](#)

Add a nick name.



Add Rules

1 2 3 4 5

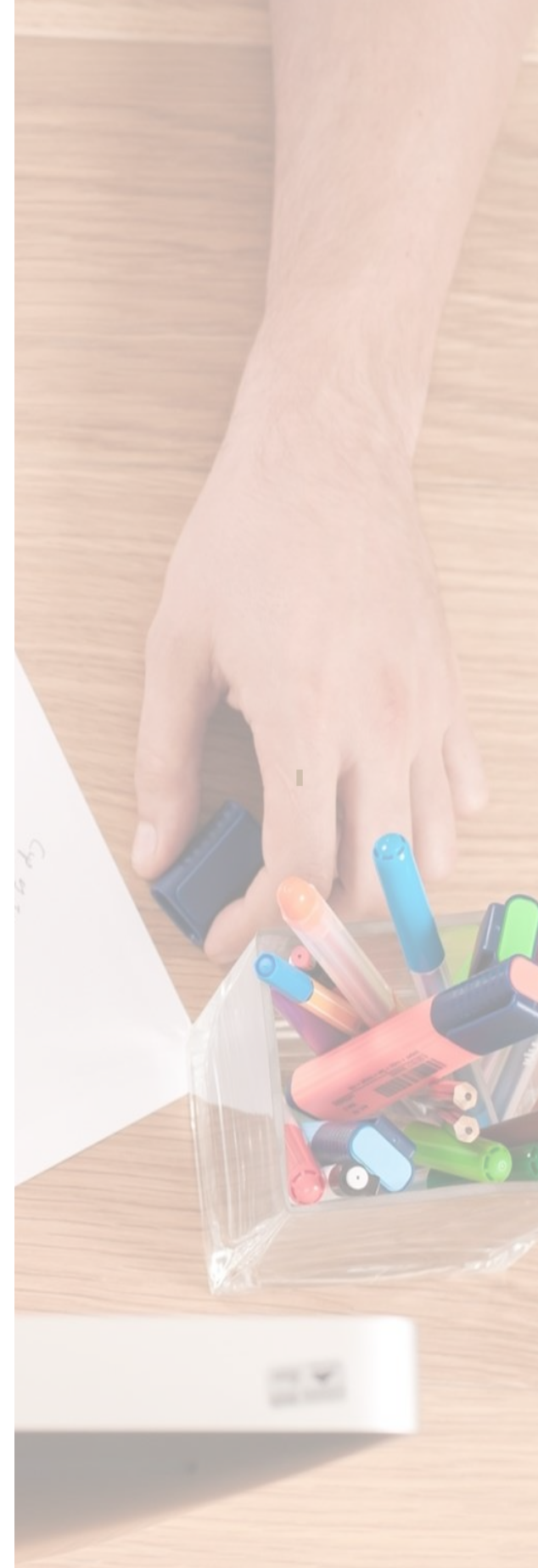
✓ Perform Action

Conditions Map Value Test Rule

Action: Map SKU

Previous Next

**Since the action is correct,
click next.**



Add Rules

Progress bar: 1. Add Rule Name (checked) → 2. Perform Action (checked) → 3. Conditions (active) → 4. Map Value → 5. Test Rule

+ Add

Field	Comparison	Map From	Conjunction	
SKU	Starts With	AB	OR	<div>Edit</div> <div>Delete</div>
SKU	Equals	ABC	OR	<div>Edit</div> <div>Delete</div>

Page 1 of 1

Previous

Next

Click edit and map SKUs matching ABC.

Add Rules

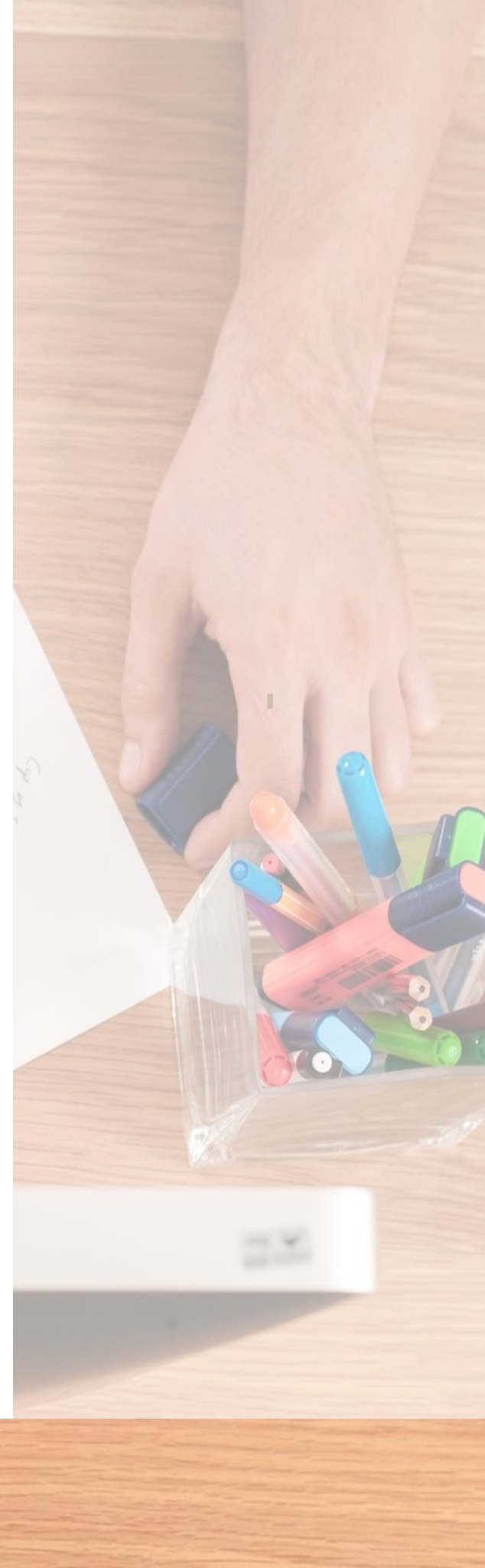
Progress bar: 1. Add Rule Name (checked), 2. Perform Action (checked), 3. Conditions (checked), 4. Map Value (active), 5. Test Rule (5)

Map To:

Navigation: Previous, Next

Speaker icon

Map to ABC-1. Depending on your action, Connex can auto complete the value.

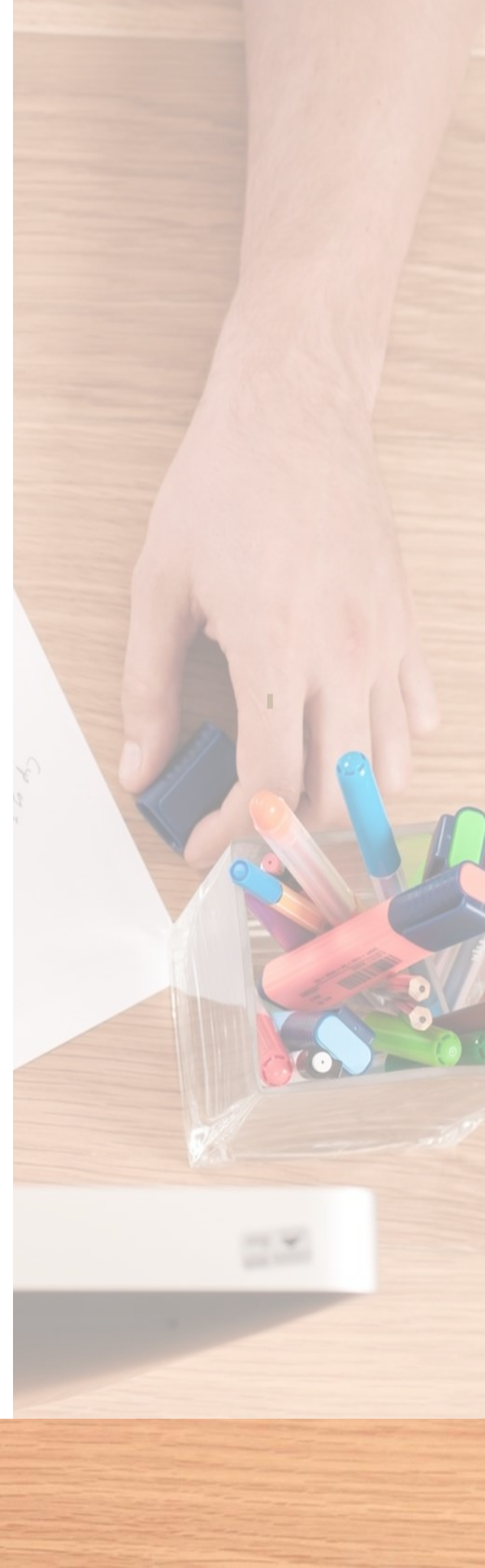


Orders

Export to Excel

	Order Date	Number	Name	Payment	Selling Channel												
▼	09/10/2019	JMA1152		Credit Card	Shopify												
<div><div>Details</div><div>Shipping</div><div>Addresses</div><div>Contact</div><div>Discounts</div><div>QuickBooks Fields</div><div>Non-Mapped Custom Fields</div><div>Mapped Custom Fields</div></div> <table><tr><th>Name</th><th>Sku</th><th>Description</th><th>Quantity</th><th>Price Excl Tax</th><th>Price Incl Tax</th></tr><tr><td>JMA Blue T Shirt - M</td><td>JMA Blue T Shirt-2</td><td>JMA Blue T Shirt - M</td><td>1</td><td>1.00</td><td>1.00</td></tr></table> <div><div>◀◀</div><div>Page 1 of 1</div><div>▶▶</div></div>						Name	Sku	Description	Quantity	Price Excl Tax	Price Incl Tax	JMA Blue T Shirt - M	JMA Blue T Shirt-2	JMA Blue T Shirt - M	1	1.00	1.00
Name	Sku	Description	Quantity	Price Excl Tax	Price Incl Tax												
JMA Blue T Shirt - M	JMA Blue T Shirt-2	JMA Blue T Shirt - M	1	1.00	1.00												

You can test the rule and see if it works, but the step is optional.





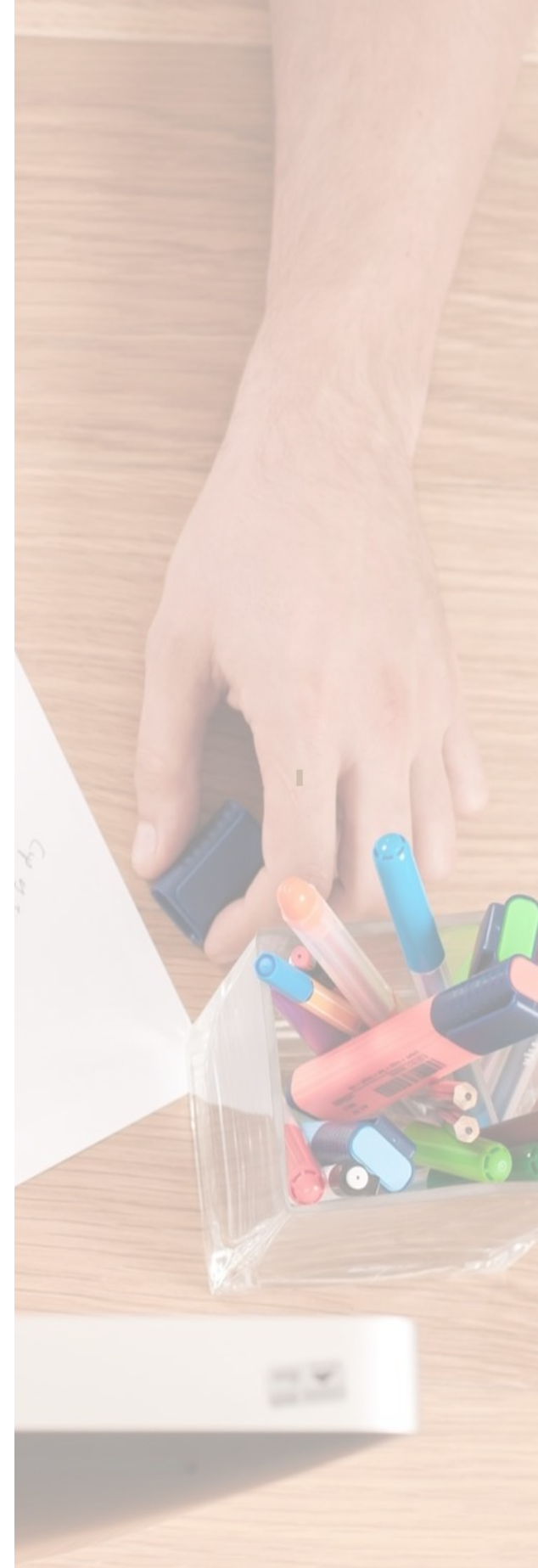
Can I chain  rules together?



Field	Comparison	Map From	Conjunction
SKU	Matches	XYZ	OR
SKU	Matches	ABC	OR

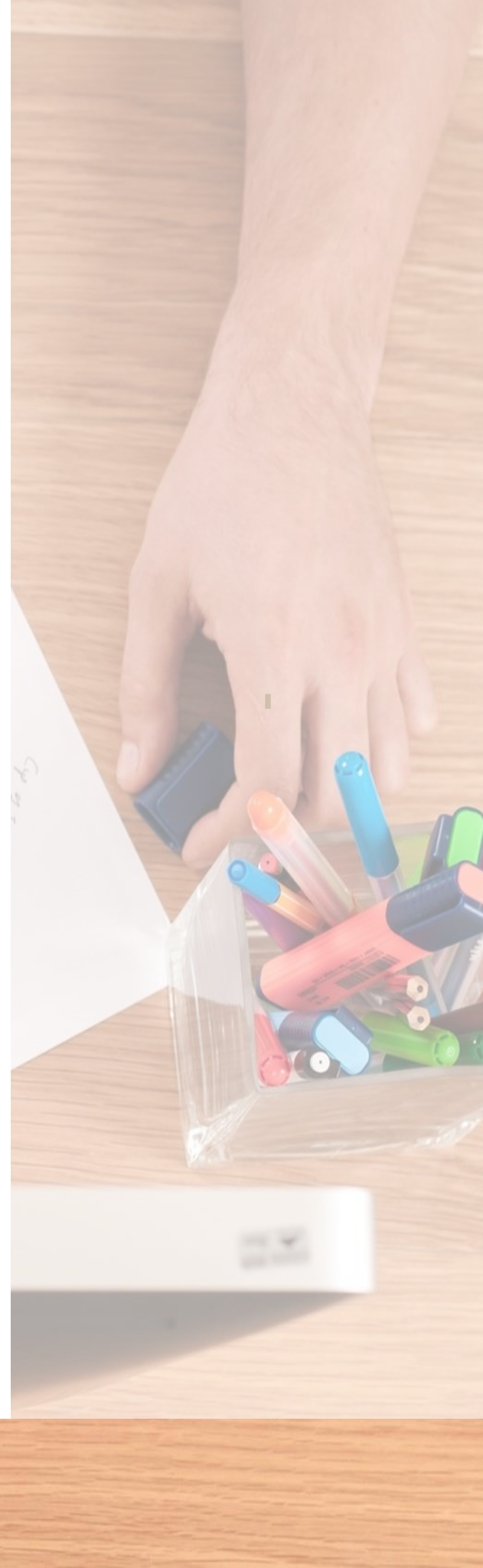


**You could say if the
product SKU is ABC or
XYZ.**



Field	Comparison	Map From	Conjunction
Payment Method	Matches	PayPal	And
Selling Channel	Matches	eBay	And

You can say if the payment method is PayPal and if the selling channel is eBay. You cannot combine the OR with the AND statement.

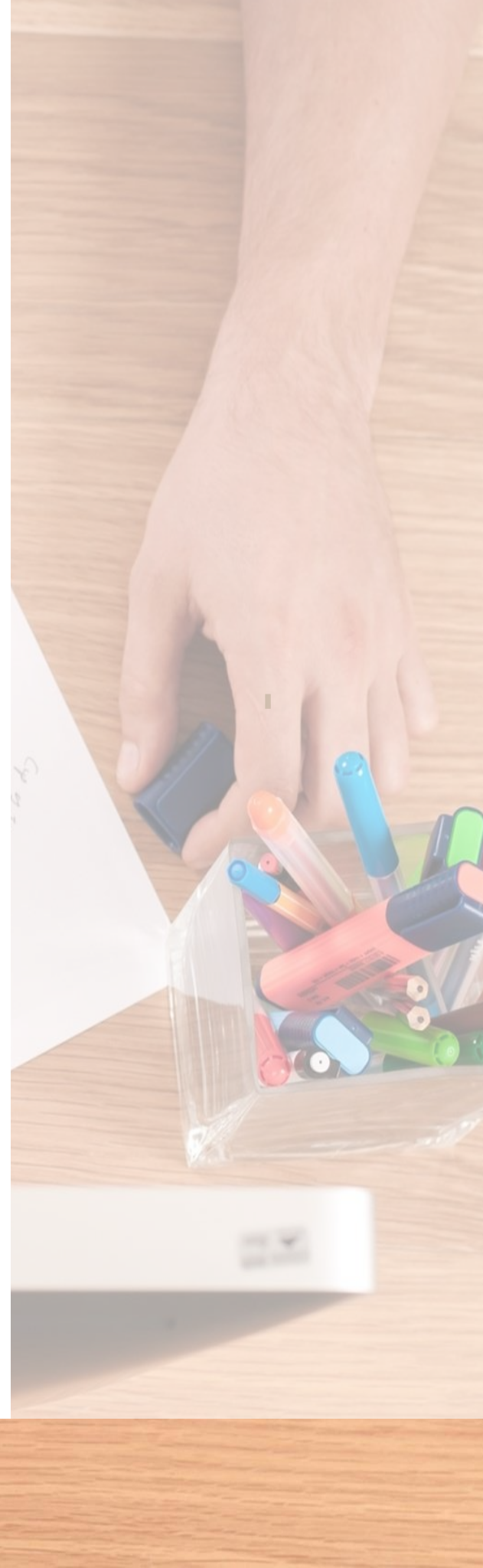




**Can I backup rules, in case I
make breaking changes?**



You can export and import spreadsheets of rules. For product mapping, you can sync a CSV file. In many cases, we ask users to export rules and copy rows. You can upload without duplicates.

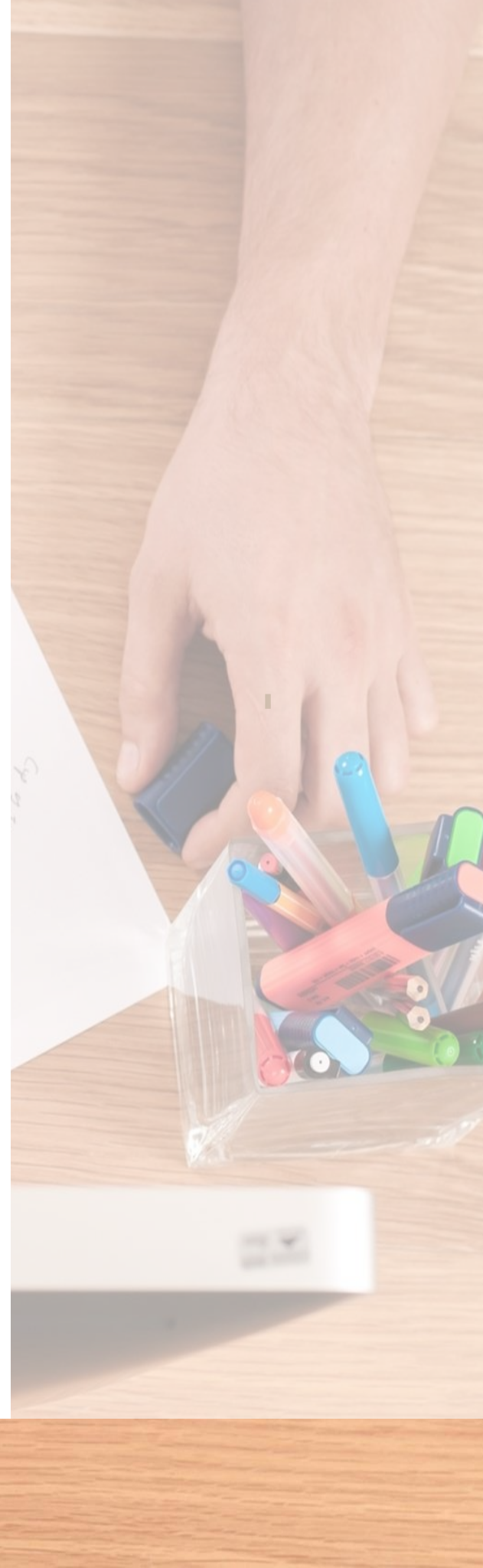




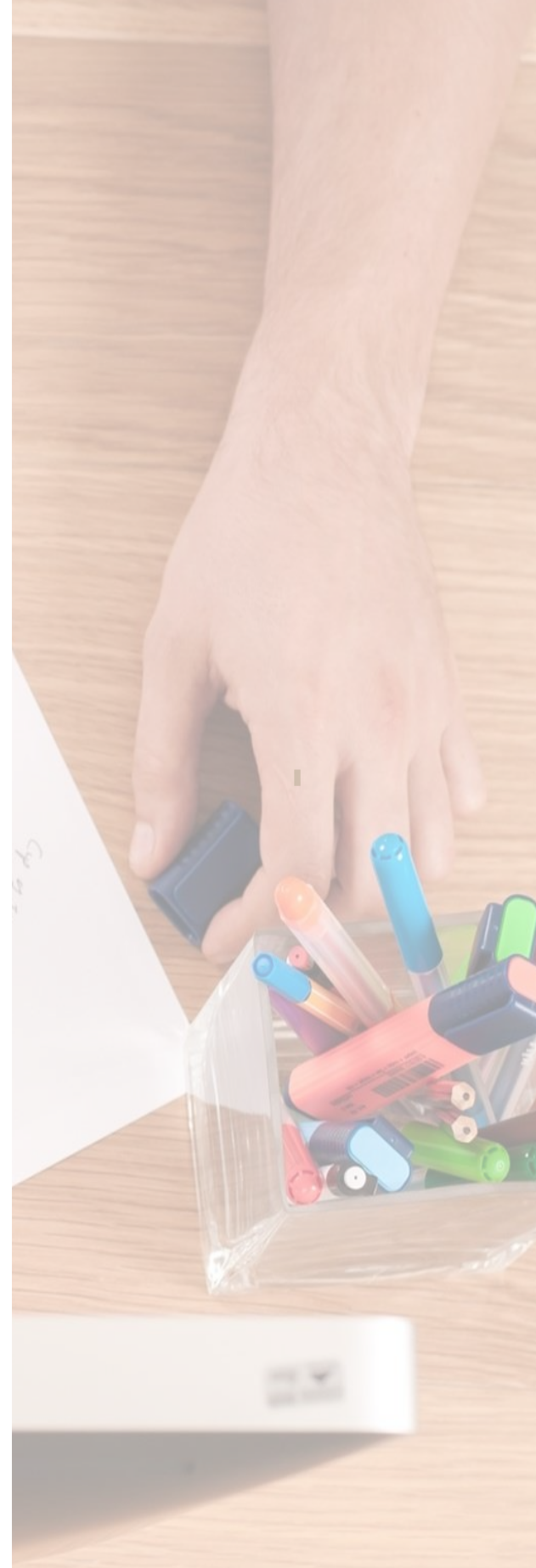
**What are best practices
with the rules engine?**



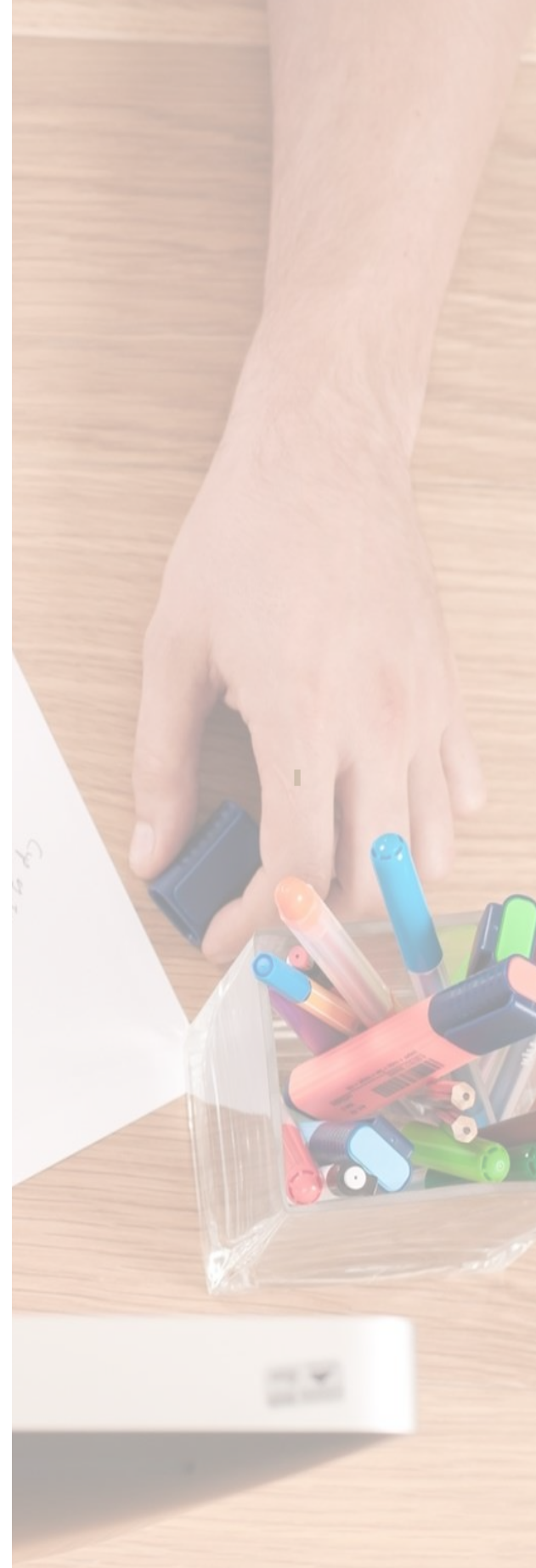
Use an ends with or a starts with to remove part of a phrase. Many users upload thousands of rules, when this simple comparison would perform better.



Use our order previewer to test rules, before syncing. This can save time. Instead of deleting and resyncing orders, you can see how a rule will perform.



We allow a maximum of 5,000 rules per user. Having a large number of rules, especially SKU mapping, can cause a slower sync.



Summary

- Rules run after orders, but before sync.
- Connex [can map almost any field](#) in QuickBooks dynamically.
- You can match a phrase or says if a phrase equals. You can compare numbers.
- You can import or export spreadsheets of rules.



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

