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# WooCommerce Plug-In

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## 1.0 Introduction

AutoCount WooCommerce Plugin is likely a software extension designed to facilitate seamless integration between AutoCount, a business accounting software, and WooCommerce, a popular e-commerce platform for WordPress. This integration aims to enhance the efficiency of managing online sales, inventory, and financial transactions by automating the exchange of data between the two systems.



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## 2.0 Installing the Plug-In

1. Go to **Tools > Plug-In Manager**
2. Click on the **“Install”** button.
3. Browse for the related **.app file** (WooCommerce)
4. A new window will prompt with some basic information of this plug-in.
5. Click on the **“Install”** button again to proceed.
6. A confirmation message will be prompted after that.
7. Click **“Yes”** to confirm the installation.
8. A success message will appear after the plug-in is installed correctly.

**NOTE:** Please ensure that the account book which is going to use the plugin has scripting module. API module is mandatory.

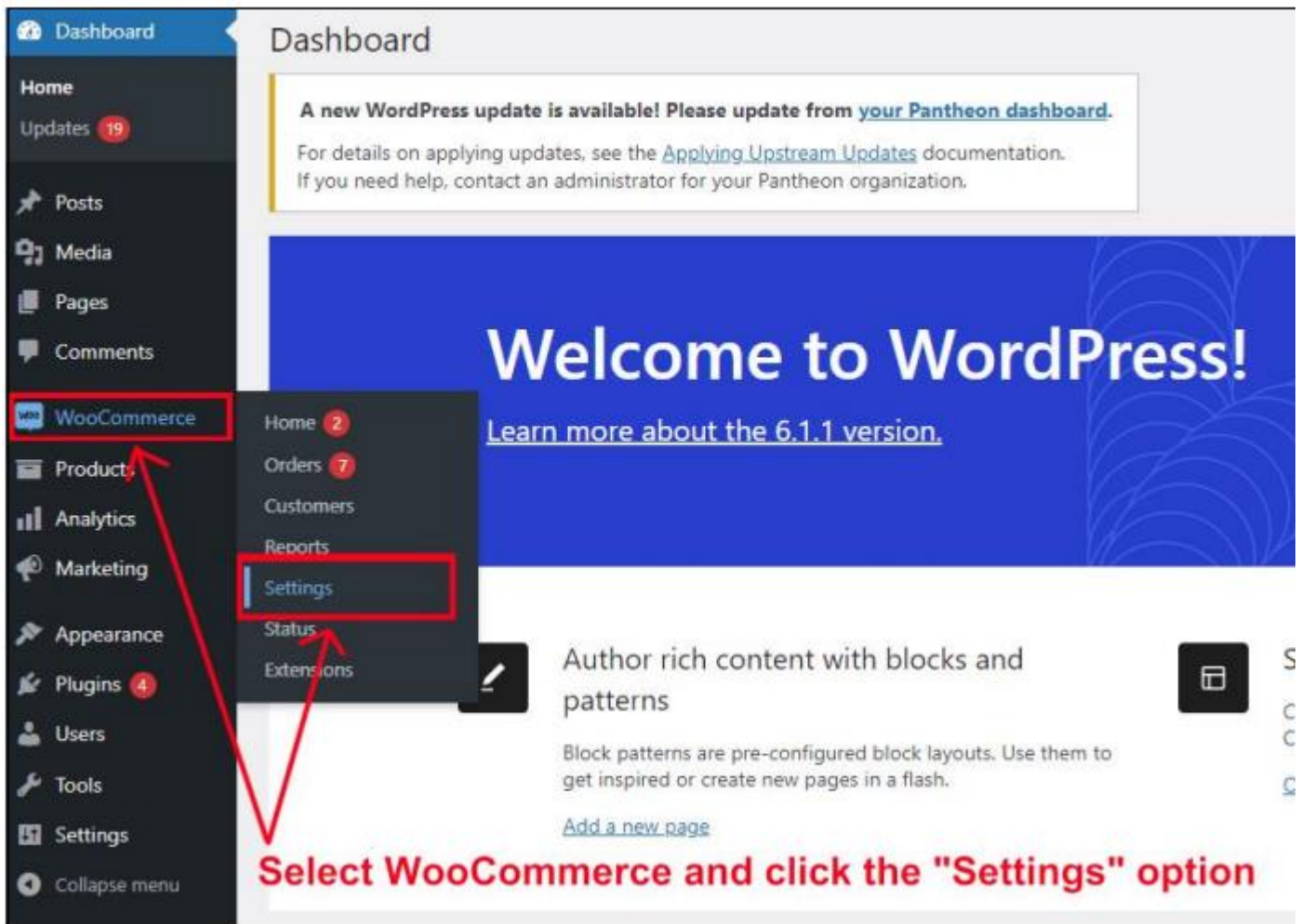


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### 3.0 REST API Setup in WooCommerce

Before using the WooCommerce plugin, the REST API should be set up in WooCommerce site. Please login to the WooCommerce admin site and perform the Rest API setup accordingly.

1. Login to the WooCommerce admin site and navigate to the “**setting**” page.





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2. Click on the “Advanced” tab.

The screenshot shows the WordPress/WooCommerce settings interface. On the left is a dark sidebar with navigation options: Dashboard, Posts, Media, Pages, Comments, WooCommerce (highlighted), Home (2), Orders (7), Customers, Reports, Settings, Status, Extensions, Products, Analytics, Marketing, Appearance, Plugins (4), and Users. The main content area is titled 'General' and contains several tabs: General, Products, Tax, Shipping, Payments, Accounts & Privacy, Emails, Integration, and Advanced. The 'Advanced' tab is highlighted with a red box and a red arrow pointing to it, with the text 'Click "Advanced" option' written in red above it. Below the tabs is a notification box: 'A new WordPress update is available! Please update from your Pantheon dashboard. For details on applying updates, see the Applying Upstream Updates documentation. If you need help, contact an administrator for your Pantheon organization.' Below the notification is the 'Store Address' section, which includes the text 'This is where your business is located. Tax rates and shipping rates will use this address.' and several input fields: Address line 1 (Ground Floor, 2081, Jalan Rozhan, Taman Impian Ria), Address line 2 (empty), City (Bukit Mertajam), Country / State (Malaysia — Penang (Pulau Pinang)), and Postcode / ZIP (14000). Below the address fields is the 'General options' section.



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3. Click on the “REST API” option.

The screenshot shows the WordPress dashboard with the WooCommerce settings page open. The 'Advanced' tab is selected, and the 'Page setup' section is visible. The 'REST API' option is highlighted with a red box and a red arrow pointing to it. A red text overlay says 'Click "REST API" option'. Below the 'Page setup' section, there are dropdown menus for 'Cart page', 'Checkout page', and 'My account page'. The 'Terms and conditions' section has a search box for a page. The 'Checkout endpoints' section is partially visible at the bottom.



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4. Then, click on the “Add key” button to add new API key.

The screenshot shows the WooCommerce REST API settings page. The 'REST API' tab is selected, and the 'Add key' button is highlighted with a red box. A red arrow points to the button with the text 'Click "Add key"'. Below the button, there is a table of existing API keys.

<input type="checkbox"/>	Description	Consumer key ending in	User
<input type="checkbox"/>	Test2	..edec350	shiraineko
<input type="checkbox"/>	API Test 1	..068fbbb	shiraineko
<input type="checkbox"/>	Description	Consumer key ending in	User



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5. Fill in the information needed and change the option of **“Permissions”**, then click the **“Generate API key”** button.

Advanced

**Fill in the description and select user and permissions, change the permissions to "Read/Write"**

General Products Tax Shipping Payments Accounts & Privacy Emails Integration Advanced

A new WordPress update is available! Please update from [your Pantheon dashboard](#).  
For details on applying updates, see the [Applying Upstream Updates](#) documentation.  
If you need help, contact an administrator for your Pantheon organization.

Page setup | REST API | Webhooks | Legacy API | WooCommerce.com | Features

Key details

Description

User

Permissions

← Then click "Generate API key"



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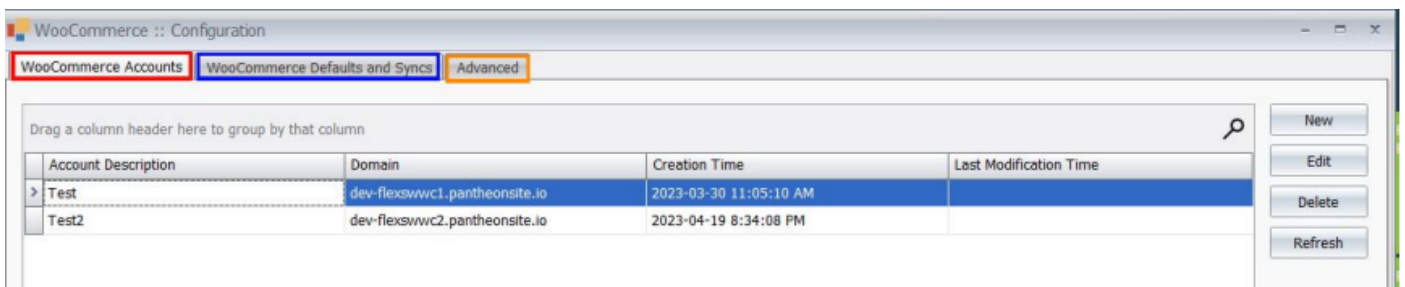
- The setup of REST API has been done. Copy the **“Consumer key”** and **“Consumer secret”** and paste them into the **“API key”** and **“Password”** fields respectively in WooCommerce plugin. Please save these keys in a place because they can only be accessed and viewed once.

The screenshot shows the 'Advanced' settings page in WooCommerce. A red text overlay reads: **Consumer key is API key and consumer secret is password in WooCommerce plugin, please save it**. Red arrows point from this text to the 'Consumer key' and 'Consumer secret' input fields. The 'Consumer key' field contains 'ck\_dac45059d35291' and the 'Consumer secret' field contains 'cs\_ed662a773ffd0d'. Both fields have 'Copy' buttons next to them. A QR code is visible below the secret field. A notification banner at the top states: 'A new WordPress update is available! Please update from your Pantheon dashboard. For details on applying updates, see the Applying Upstream Updates documentation. If you need help, contact an administrator for your Pantheon organization.'



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## 4.0 Configuration



The Configuration feature of WooCommerce plugin is used to configure the overall working flow of the WooCommerce plugin, which includes auto order sync and inventory level sync. According to the picture above, the Configuration feature of the WooCommerce plugin contains three sections:

- WooCommerce Accounts (red frame)
- WooCommerce Defaults and Syncs (blue frame)
- Advanced (orange frame)



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## 5.0 Create New WooCommerce Accounts

1. Enter the “**Account description**” field. This field can be WooCommerce shop name or any other description which can be used to identify this account easily.
2. Enter the “**Domain**” field. This field should be the WordPress URL. Take the URL after the “https://”. The “https://” is not required.

WooCommerce :: Create New WooCommerce Account

Account description:

Domain:

API key:

Password:

Save Cancel



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3. Please refer to the following picture for example:

The screenshot shows the WordPress 'General Settings' page. The left sidebar contains a menu with 'Settings' highlighted in blue. A red box highlights the 'WordPress Address (URL)' field, which contains the URL 'https://dev-flexswc1.pantheonsite.io'. A red arrow points from this field to the 'Site Address (URL)' field, which also contains the same URL. Another red arrow points from the 'Settings' menu item to the 'WordPress Address (URL)' field. Red text annotations are present: 'Use this URL, just take the URL after the "https://"' and 'Go to "Settings"'. A notification banner at the top of the settings page reads: 'A new WordPress update is available! Please update from your Pantheon dashboard. For details on applying updates, see the Applying Upstream Updates documentation. If you need help, contact an administrator for your Pantheon organization.'



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4. Enter the “API key” and “Password” fields. API key is consumer key and password are consumer secret.
5. Click the “Save” button to create a new account.



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## 6.0 WooCommerce Defaults and Sync

### 6.1 Create New WooCommerce Default and Sync

WooCommerce Default | WooCommerce Sync

WooCommerce account: \*

Default debtor: \*

Default sales location: \*

Default allocated stock location: \*

Default department (optional):

Default project (optional):

Default package price correction item: \*

Default shipping fee item: \*

Default fixed fee item: \*

Default coupon item: \*

Default sales invoice no. format: \*

Default AR payment no. format: \*

Default document date format: \*

Enable default item

Default item:

Post order to sales order

Default sales order no. format:

Default implicit mapped UOM type: \*

Auto create missing debtor during order sync

Default debtor control account:

Default debtor type:

Default sales agent:

Default currency:

Default credit term:

Default order status for sales posting: \*  Pending payment  Processing  On hold  Completed

Save Cancel



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**Note:**

**WooCommerce Default:** The main default configuration of a particular WooCommerce account in the WooCommerce plugin, which will be applied in auto order sync. It includes the default setting necessary to create a sales order, a sales invoice, and an AR payment.

**WooCommerce Sync:** The default configuration for auto order sync and inventory level sync of a particular WooCommerce account in the WooCommerce plugin. It includes date setting for the launch of auto order sync and inventory level sync.



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## 6.2 WooCommerce Default

1. Go to **WooCommerce > Configuration**.
2. Go to **Configuration > WooCommerce Default and Sync**.
3. Click on the **"New"** to create a new default.
4. Fill in the required fields under the **"WooCommerce Default"** section.
5. Click on the **"Save"** button to save the new WooCommerce default.

WooCommerce Default

WooCommerce Sync

WooCommerce account: \* Select a WooCommerce account...

Default debtor: \* Select a default debtor...

Default sales location: \* Select a default sales location...

Default allocated stock location: \* Select a default allocation stock location...

Default department (optional): Select a default department...

Default project (optional): Select a default project...

Default package price correction item: \* Select a default package price correction item...

Default shipping fee item: \* Select a default shipping fee item...

Default fixed fee item: \* Select a default fixed fee item...

Default coupon item: \* Select a default coupon item...

Default sales invoice no. format: \* Select a default sales invoice no. format...

Default AR payment no. format: \* Select a default AR payment no. format...

Default document date format: \* Select a default document date format...

Enable default item

Default item: Select a default item...

Post order to sales order

Default sales order no. format: Select a default sales order no. format...

Default implicit mapped UOM type: \* Base UOM

Auto create missing debtor during order sync

Default debtor control account: Select a default debtor control account...

Default debtor type: Select a default debtor type...

Default sales agent: Select a default sales agent...

Default currency: Select a default currency...

Default credit term: Select a default credit term...

Default order status for sales posting: \*  Pending payment  Processing  On hold  Completed

Save Cancel



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### 6.3 WooCommerce Sync

1. Run Order Sync: Enables or disables auto order sync. Requires WooCommerceServiceSetup.msi installation.
2. Service Restart Sync Date: Used to restart auto order sync for missing orders. Date can be set multiple times.
3. WooCommerce Start Date: Commencement date for auto order sync. Set once to initiate synchronization.
4. Run Inventory Level Sync: Activates or deactivates auto inventory level sync. Requires WooCommerceServiceSetup.msi installation.
5. Consider Allocated Stock: Deducts stock from orders with non-sales status during auto inventory level sync, akin to reserve stock.
6. Skip AR Payment Posting During Order Sync for Order Status: Optionally skips specified WooCommerce order statuses for AR payment posting during auto order sync.
7. Order Sync Date Type: Determines date type (order create/update) used in auto order sync. Default is **“WooCommerce order update date”**.

WooCommerce Sync configuration window showing the following settings:

- Run order sync?  Yes
- Service restart sync date: [Date Picker] *For back date resync missing orders or payment only.*
- WooCommerce start date: [Date Picker] *WooCommerce's orders cut off date.*
- Run inventory level sync?  Yes
- Consider allocated stock?  Yes, deduct quantities from pending payment, processing and on hold orders.
- Skip AR payment posting during order sync for order status:  Pending payment  Processing  On hold  Completed
- Order sync date type: [Dropdown: WooCommerce order update date]



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## 7.0 Configuration

### 7.1 Configuration – Introduction



The screenshot shows the 'WooCommerce :: Configuration' window with three tabs: 'WooCommerce Accounts', 'WooCommerce Defaults and Syncs', and 'Advanced'. The 'Advanced' tab is selected. The 'Token' section is highlighted with a red border and contains the following elements: a 'Recreate' button, a checkbox for 'Use custom database credentials', and input fields for 'User name:' and 'Password:'. Below these are 'Save' and 'Edit' buttons. The 'Log' section is highlighted with a blue border and contains two checked checkboxes: 'Clear order sync log every 1 day(s)' and 'Clear inventory level sync log every 1 day(s)'. Below these are 'Save' and 'Edit' buttons.

**Note:**

Token: Configure and create token file needed for auto order sync and inventory level sync.

Log: Configure the log clearing setting, which will be run regularly during auto order sync and inventory level sync.



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## 7.2 Token

The screenshot shows a window titled "Token". At the top, it says "Recreate the token storing database credentials." with a "Recreate" button to the right. Below this is a checkbox labeled "Use custom database credentials". Underneath, it says "Custom database credentials:" followed by two text input fields: "User name:" and "Password:". At the bottom of the window, there are "Save" and "Edit" buttons.

Text Field	Description
<b>Recreate the token storing database credentials</b>	<ul style="list-style-type: none"> <li>This field allows the users to recreate the token file used for auto order sync and inventory level sync.</li> <li>If the token file is missing, the users are advised to click on the “Recreate” button to recreate the token file. This is because without the token file, the auto order sync and inventory level sync will not launch due to missing database credentials.</li> <li>The token file is stored in (Example) C:\ProgramFiles (x86)\SISoftwareSolutionsSdnBhd\WooCommerceService.Setup and its filename is WooCommerce_Token.json.</li> </ul>
<b>Use custom database credentials</b>	<ul style="list-style-type: none"> <li>This field allows the users to use custom database credentials, which should be configured by the users themselves.</li> <li>This field is enabled only when the database used by AutoCount is located at different machine, for example, another server.</li> <li>To edit this field, the users should click on the “Edit” button.</li> </ul>



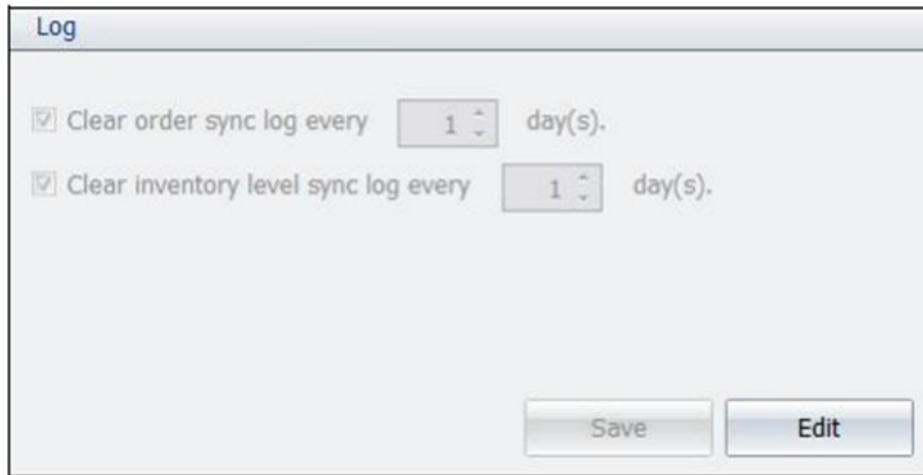
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	<ul style="list-style-type: none"> <li>To save this field, the users should click on the “Save” button.</li> </ul>
<b>Username</b>	<ul style="list-style-type: none"> <li>This field refers to the custom database username provided by the users.</li> <li>This field is configured only when the database used by AutoCount is located at different machine, for example, another server.</li> <li>To edit this field, the users should click on the “Edit” button.</li> <li>To save this field, the users should click on the “Save” button.</li> </ul>
<b>Password</b>	<ul style="list-style-type: none"> <li>This field refers to the custom database password provided by the users.</li> <li>This field is configured only when the database used by AutoCount is located at different machine, for example, another server.</li> <li>To edit this field, the users should click on the “Edit” button.</li> <li>To save this field, the users should click on the “Save” button.</li> </ul>



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### 7.3 Log



Text Field	Description
<p><b>Clear order sync log every 1 day(s)</b></p>	<p>Users can set the frequency for deleting order sync logs with this field. They have the flexibility to adjust the deletion schedule according to their preferences. Once activated, the system will automatically clear the logs based on the configured interval (every n day(s)). The recommended intervals are 3 or 5 days. To modify this setting, users can click the <b>“Edit”</b> button, and to save the changes, they should click the <b>“Save”</b> button.</p>
<p><b>Clear inventory level sync log every 1 day(s)</b></p>	<p>Users can set the frequency for deleting inventory level sync logs using this field, with the interval (n days) configured by users. They can adjust the interval based on their preference. Once activated, the system automatically clears the log every n day. The recommended intervals are 3 or 5 days. To modify, click the <b>“Edit”</b> button, and to save changes, click <b>“Save”</b>.</p>

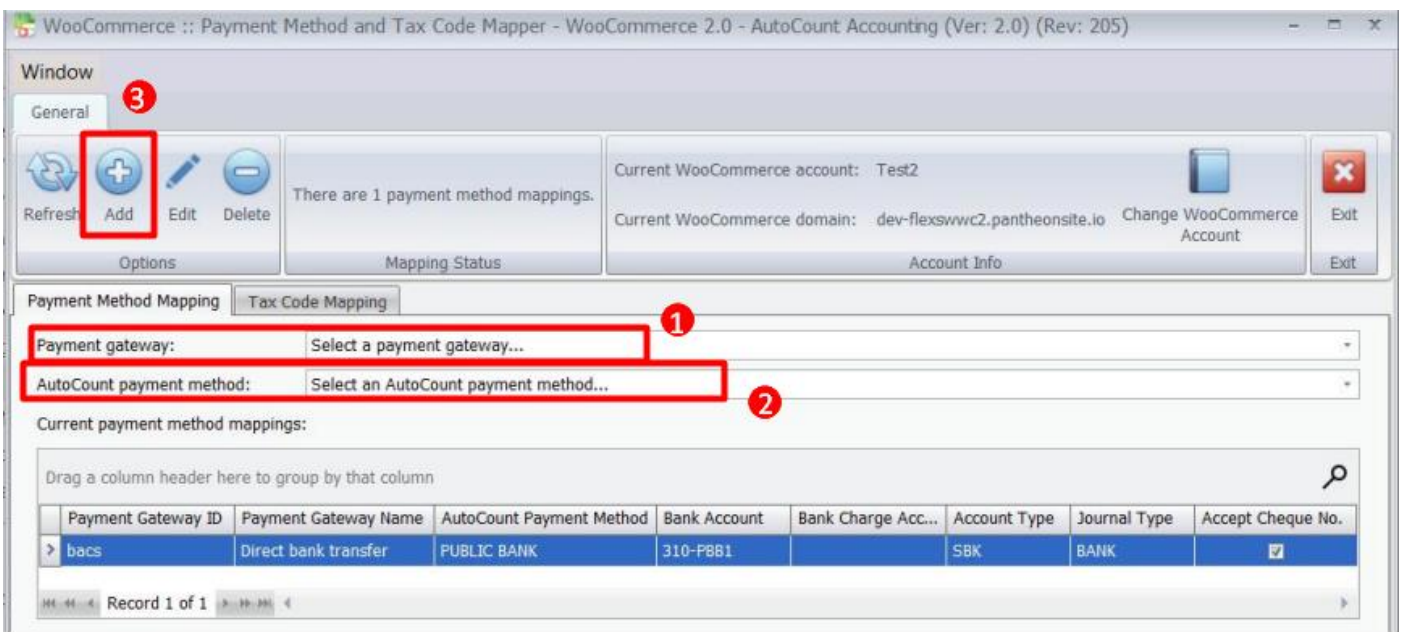


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## 8.0 Payment Method and Tax Code Mapper

### 8.1 Payment Method Mapping

1. Select a payment gateway of WooCommerce for "Payment gateway" field.
2. Select a payment method of AutoCount for "AutoCount payment method" field.
3. Click the "Add" button to save the mapping.



WooCommerce :: Payment Method and Tax Code Mapper - WooCommerce 2.0 - AutoCount Accounting (Ver: 2.0) (Rev: 205)

Window

General

Refresh Add Edit Delete

Options

There are 1 payment method mappings.

Mapping Status

Current WooCommerce account: Test2

Current WooCommerce domain: dev-flexswwc2.pantheonsite.io

Change WooCommerce Account

Account Info

Payment Method Mapping Tax Code Mapping

Payment gateway: Select a payment gateway... 1

AutoCount payment method: Select an AutoCount payment method... 2

Current payment method mappings:

Drag a column header here to group by that column

Payment Gateway ID	Payment Gateway Name	AutoCount Payment Method	Bank Account	Bank Charge Acc...	Account Type	Journal Type	Accept Cheque No.
bacs	Direct bank transfer	PUBLIC BANK	310-PBB1		SBK	BANK	<input checked="" type="checkbox"/>

Record 1 of 1

**\*Note:** Payment method mapping is required during the process of posting AR payment in auto order sync. If no payment method mapping found, AR payment posting will be failed.



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## 8.2 Tax Code Mapper

1. Select a tax rate of WooCommerce for "**Tax rate**" field.
2. Select a tax code of AutoCount for "**AutoCount tax code**" field.
3. Click "**Add**" button to save the mapping.

WooCommerce :: Payment Method and Tax Code Mapper - WooCommerce 2.0 - AutoCount Accounting (Ver: 2.0) (Rev: 205)

Window

General

Refresh Add Edit Delete

Options

There are 1 tax code mappings.

Mapping Status

Current WooCommerce account: Test2

Current WooCommerce domain: dev-flexswvc2.pantheon.io

Change WooCommerce Account

Exit

Exit

Account Info

Payment Method Mapping Tax Code Mapping

Tax rate: Select a tax rate...

AutoCount tax code: Select an AutoCount tax code...

Current tax code mappings:

Drag a column header here to group by that column

Tax Rate ID	Tax Rate N...	AutoCount ...	Description	Tax Acc. No.	Tax Percent...	Govt. Tax C...	Is Default	Is Zero Rate	Use Trans. ...	Add To Cost
> 1	SST	S-10	Sales Tax 1...	SST-4010	10.000000	S-10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Record 1 of 1

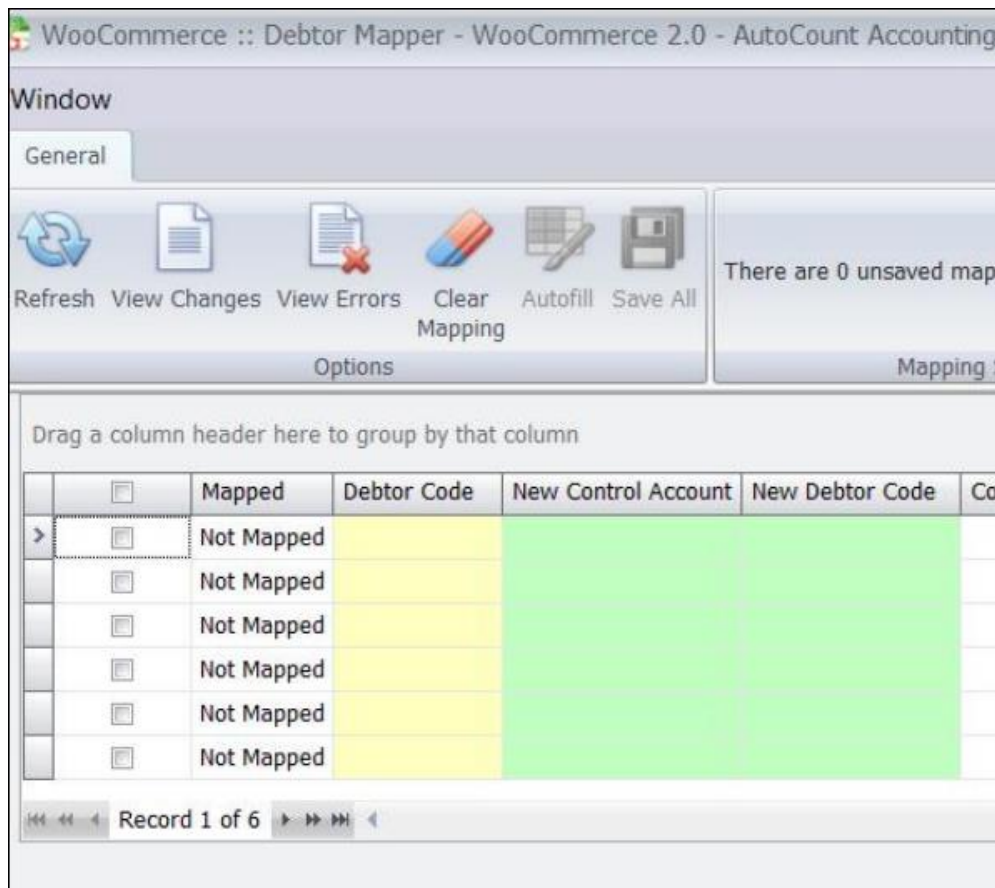
**\*Note:** Tax code mapping is required only when tax rate is enabled in WooCommerce. If no tax code mapping found during auto order sync, the final total of sales document will become incorrect, therefore the sales document posting will be failed.



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### 8.3 Debtor Mapper

1. Choose a debtor code to link a WooCommerce customer with an existing AutoCount debtor in the “**Debtor Code**” field.
2. Save the mapping by clicking the “**Save All**” button.
3. For deletion, select the mapping to be cleared, press “**Clear Mapping**”, and then click “**Save All**” to confirm the deletion.
4. To create a new debtor, select records and use [Autofill] or choose a “**New Control Account**” and enter a code in “**New Debtor Code**”. Default is “<<New>>”, but users can customize.



**\*Note:** It is recommended to use View Debtor Mapping feature to determine the WooCommerce customers that do not have any debtor mapping information before using the Debtor Mapper feature.

**\*Note:** All changes made in the Debtor Mapper feature will take effect only when the “**Save All**” button is clicked.



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### 8.4 Item Mapper

To map a WooCommerce product to an existing AutoCount stock item, follow these steps:

1. Select an item code and a unit of measure (UOM) for the "Item Code" and "UOM" fields, respectively.
2. If the product is an item package, select a package code for the "Package Code" field.
3. Click "Save All" to save the mapping.
4. To delete a mapping, select it and click "Clear Mapping," then click "Save All" to confirm.
5. To create a new stock item for the WooCommerce product, tick the records and click "Autofill," or enter a new item code, UOM, and rate.

WooCommerce :: Item Mapper - WooCommerce 2.0 - AutoCount Accounting (Ver: 2.0) (Rev: 2.0)

Window

General

Refresh View Changes View Errors Clear Mapping Autofill Save All

Options Mapping Status

There are 0 unsaved mapping(s) and 0 errors

Drag a column header here to group by that column

	<input type="checkbox"/>	Map...	Item Code	UOM	Package Code	New Item Code	New Item UOM ▲	Rate
>	<input type="checkbox"/>	Not ...						
	<input type="checkbox"/>	Not ...						
	<input type="checkbox"/>	Not ...						
	<input type="checkbox"/>	Not ...						
	<input type="checkbox"/>	Not ...						

Record 1 of 5

Page 1

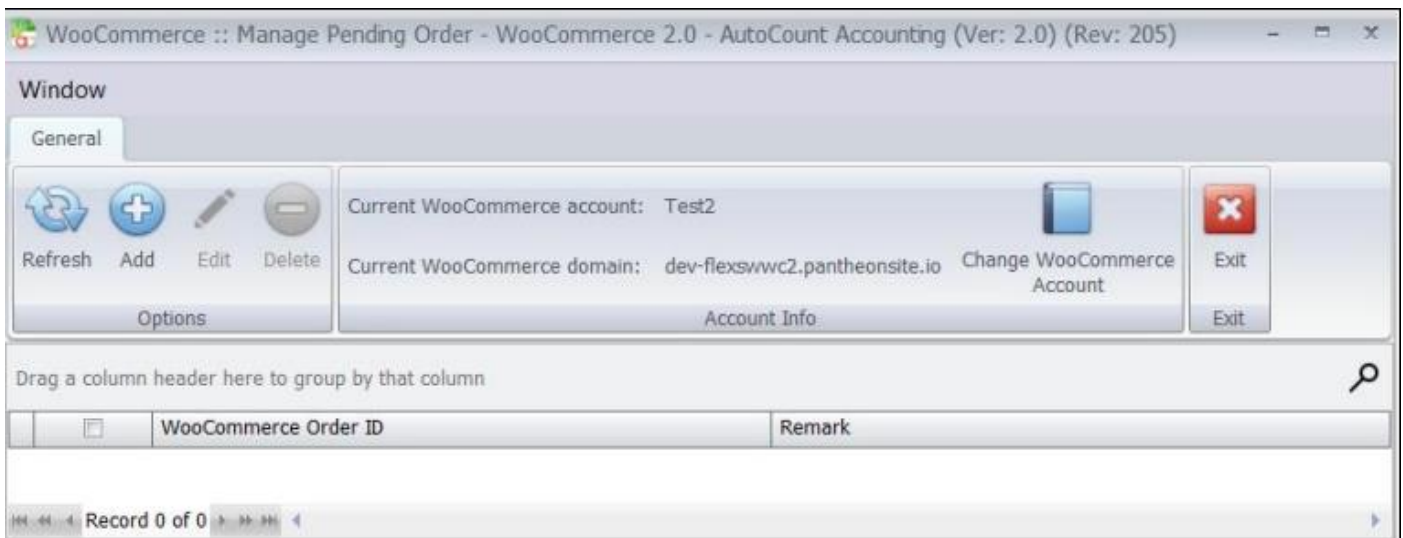


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## 8.5 Manage Pending Order

The Manage Pending Order feature of the WooCommerce plugin is used to view, add, edit, and delete pending WooCommerce orders. These orders typically fail to be posted to AutoCount sales documents during auto order sync due to various reasons, such as:

- Missing item mapping for one or more WooCommerce products sold in a WooCommerce order.
- Missing payment method mapping.
- Missing tax code mapping.
- The total amount of sales document does not equal the total amount of WooCommerce order.
- Network issues.





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## 9.0 Bulk Knock Off Feature

The Bulk Knock Off feature in the WooCommerce plugin allows users to import WooCommerce order IDs and their knock-off amounts to knock off multiple AutoCount A/R invoices.

### 1. Prepare the Spreadsheet:

- Create a spreadsheet with two columns: Order ID and Statement Amount. The Order ID column should contain the WooCommerce Order IDs, and the Statement Amount column should contain the knock-off amounts.

	A	B
1	Order ID	Statement Amount
2	23	99.9

### 2. Accessing the Feature:

- When creating a new A/R payment, select a debtor before accessing the Bulk Knock Off feature.
- When editing an existing A/R payment, the Bulk Knock Off feature can be accessed directly.

The screenshot shows the 'New A/R Receive Payment' window in AutoCount Accounting (Ver: 2.0). The 'Bulk Knock-Off' button is highlighted with a red box. Below the button, the 'Debtor' is set to '300-W001' and 'Payment's Currency' is 'MYR'. The 'Paid By' is 'WOO COMMERCE'. The 'Description' field is empty. The 'Date' is '20/04/2023'. The 'Payment Method' is 'Cheque No.' and the 'Payment Amount' is '0.00'. The 'Bank Charge' is '0.00'. The 'To Bank Rate' is '1'. The 'Bank Charge ...' is '0.00'. The 'Payment By' is 'Is RCHQ' and 'RCHQ Date' is empty. The 'Amount' is '0.00' and the 'Unapplied Amount' is '0.00'. The 'Knock-off Invoices/Debit Notes' table is shown below.

Type	Date	No.	Org. Amt.	Outstanding	Discount Due	With Disc.	Disc. Amt.	Pay	...	Knock Off Date	WooCommerce ...
RI	17/04/2023	23	99.90	99.90			0.00	0.00			23
RI	17/04/2023	33	103.09	103.09			0.00	0.00			33
RI	18/04/2023	WC-0003	71.90	71.90			0.00	0.00			29
RI	18/04/2023	WC-0008	103.09	103.09			0.00	0.00			33



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### 3. Import Data:

- Use the Bulk Knock Off feature to import the prepared spreadsheet with WooCommerce Order ID and their respective knock-off amounts.

By following these steps, users can efficiently knock off multiple AutoCount A/R invoices associated with their WooCommerce orders, providing a streamlined process for managing A/R Payment, A/R Credit Note, and A/R and A/P Contra modules.