



MyWorks QuickBooks Sync for WooCommerce Case Studies

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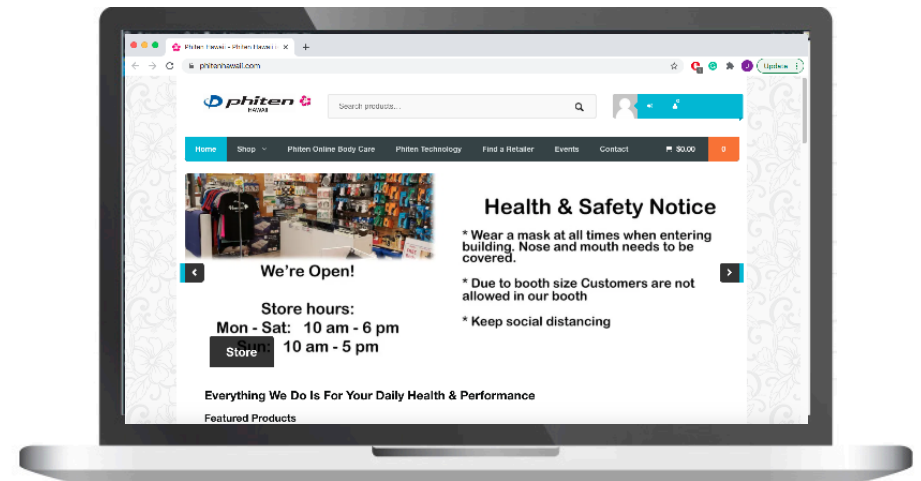
QuickBooks Sync for WooCommerce



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About Phiten Hawaii

Phiten is a Japanese health tech company that aids with muscle pain and relaxation. The company has a wide range of solutions to help individuals who suffer from any type of body pain. In their own words, “Phiten products incorporate a novel form of technology that involves metals broken down into microscopic particles dispersed in the water”. Their alternative muscle-soothing products are popular among national US sports teams as well as individuals of all ages. Toshi runs Phiten’s Hawaii chapter and has recently introduced a new and more accessible service that’s available throughout Hawaii: Zoom consultations that include instant healing using the personalized healing package.



How Phiten Hawaii uses MyWorks QuickBooks Sync for WooCommerce

Phiten Hawaii has been using WooCommerce and QuickBooks since 2015, but it wasn't until 2020 that they sought out an integration between the two. Their COVID-19 related rise in eCommerce sales and consequently increase in manual data entry led the team to explore alternative options. Their PayPal connection between WooCommerce and QuickBooks did not provide the data they needed. In fact, it caused more accounting and inventory management issues.

As Toshi explains, The PayPal connection provided QuickBooks insufficient data to create needed reports. As you can see in the screenshot below, all products sold were synced over as "PayPal item" – meaning Phiten was missing key data on the products sold, which is needed to create accounting reports as well as to track inventory changes.

Plus, it brought over fragmented data such as the "PayPal Adjustment" that directs the user to refer to the PayPal transaction for more details.

Sales Receipt #2367

Credit Card: 9FN96154CH9075053 PayPal Bank

Enter credit card details

☐ Process credit card

#	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	TAX	CLASS
1	PayPal Item	X30 Phiten Titanium Power Tape Disc	1	16	16.00	✓	
2	PayPal Item	Phiten Cool Down Relax Gel	2	20	40.00	✓	
3	PayPal Shipping	PayPal Shipping and Handling - Shipping: 5.95 and Handling: 0.00	1	5.95	5.95		
4	PayPal Adjustment	Adjustment line amount. Please check your PayPal transaction for details on this line amount.	1	-11.20	-11.20		
5							

Add lines Clear all lines

Message displayed on sales receipt

Message displayed on statement

Money Received (Reference: PayPal Transaction #)

Subtotal: \$50.75

Taxable subtotal: 2.39

PayPal Sales Tax: 0%

Discount percent: \$0.00

Shipping: \$0.00

Total: \$50.75

After installing, configuring and syncing with MyWorks, Toshi was able to bring in much more complete data. As you'll see in the screenshot below, he can now see customer data, billing and shipping addresses and WooCommerce Order numbers. More importantly, he now has information on exactly what products were sold. Rather than categorizing all sales under "PayPal Product", he can now categorize sales, income and cost of goods sold by product sold.

The PayPal QuickBooks integration simply imports sales and income data into QuickBooks. PayPal's inability to map products means that sales synced can only be categorized as sales. This fragmented data reduces the depth of your QuickBooks reporting.

MyWorks Sync, on the other hand, syncs complete sales data from WooCommerce into QuickBooks. Thanks to our product mapping, you'll be able to sync sales into their corresponding products and their corresponding sales, income, and cost of goods sold accounts. That means that you can pull complete sales reports – utilizing QuickBooks to its full potential!

Thanks to MyWorks Sync, Toshi has dramatically reduced the amount of time he spends on his accounting in QuickBooks while also increasing the depth of his data and reporting.

Sales Receipt # 15882

Monolulu, HI 96826
United States (US)

Ship via Shipping date Tracking no.

Shipping to
Beom Lee
1920 Young St.
Apt 5
Honolulu, HI 96826
United States (US)

PO # Customer # Supplier #

Payment method Reference no. Deposit to

PayPal 15882 PayPal Bank

#	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	TAX	CLASS
1	JFS90007	Compression Pants Black 3L	1	62	62.00	✓	
2							

Add lines Clear all lines

Subtotal \$62.00

Taxable subtotal \$62.00

PayPal Sales Tax 0% 0.00

Discount percent 0.00

Shipping 0.00

Total \$62.00

Message displayed on sales receipt

Message displayed on statement



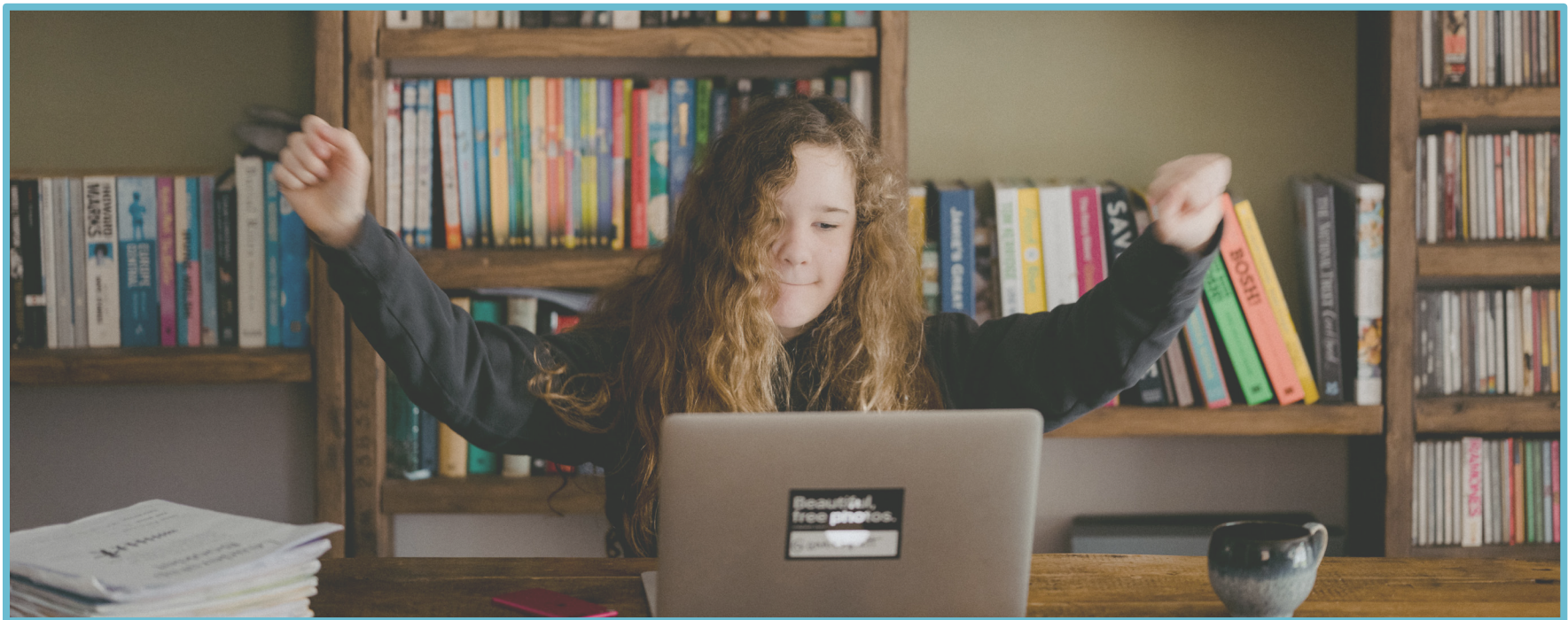
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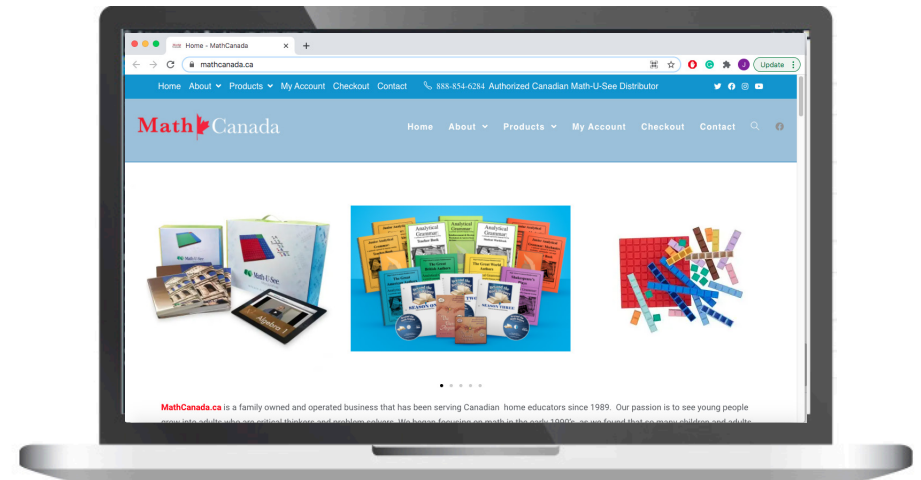
Introduction

Math Canada is a family owned and operated company based in Vancouver, Canada. They sell math educational supplies through their WooCommerce store, and use MyWorks Sync to automate their data sync to QuickBooks. We recently sat down with Jacki and Beth-Anne to learn a little more about how they use MyWorks and ask them our favorite and most important question: how many hours a week do you save by using MyWorks Sync?



About Math Canada

Math Canada is a family-owned business that sells education equipment for educators who focus on homeschooling and tutoring their students. Inspired by their founder's personal struggle both learning and teaching mathematics, they sought to create materials that make math as fun as it can be. They primarily sell K-12 math education products that enable instructors to teach hands-on. Math Canada's workbooks include concrete lessons and exercises that aid in teaching math, and they provide material for students to become successful. Those materials include DVDs, hard copy of textbooks and workbooks, Digital material, etc. On top of selling math products, Math Canada has also started to sell spelling and grammar material. Owner, Jacki Knight, has been in the business of homeschooling children for 30 years now!



About the company's use of WooCommerce and QuickBooks

A shift towards homeschooling brought on by COVID-19 has increased the demand for homeschooling materials, which has consequently increased the demand for Math Canada's products. This exponential boom, while great, put a strain on the business as it required an exponential increase in manual labor to enter every WooCommerce order in QuickBooks to keep accurate accounting - and reporting. The family-owned powerhouse was not able to keep up with all their sales and able to input all their orders into their accounting system every day.

A recent switch to using WooCommerce as an eCommerce platform opened the business up to the ability to use MyWorks Sync to sync WooCommerce and QuickBooks. After hearing about the owner's concern about manual data entry, their web designer suggested MyWorks. They reached out to us and after a great demo call, we were able to help automate their accounting as they signed up, used our documentation and support tickets to assist with their setup!

"MyWorks was great right off the get-go! It was super easy to get in touch with you, and support was great - when you have a business, you don't have time to worry about these things"

- Jacki, CEO of Math Canada.

How much time has MyWorks help save for Math Canada? Is there anything features you wish MyWorks had?

MyWorks has been able to save Math Canada countless hours of having to input all their orders and data between WooCommerce and Quickbooks. When we asked Math Canada how much time they are currently spending inputting data, they replied with only 15 minutes per day now.

“If we were handling that data manually, it would take us days to enter those orders in Quickbooks - it wouldn't even be possible!”

Math Canada decreased their manual entry time from “days” to 15 minutes a day.



Is there anything MyWorks is missing? How can we improve?

During our call, Math Canada expressed that their main issue now is having to fix rounding issues and making deposits as well as having refunds sync over. These would be a few things that they would like MyWorks to do. Much to their happy surprise, we were able to confirm during that call that MyWorks certainly can resolve their rounding issues and handle those batch deposits to match the deposits their payment processor enters in their bank.

After a few minutes on the phone with Jacki, we were able to get those issues resolved for her by just adjusting a few settings in her MyWorks Sync.

What's your favorite MyWorks Feature?

According to Jacki and her team over at Math Canada, their favorite features of MyWorks would have to be the automatic sync feature that removes the burden of manually inputting orders in QuickBooks! They mentioned that without MyWorks, they would have needed a whole other employee to cover the manual data entry! Math Canada was also pleasantly surprised by MyWorks' great support. They were hesitant at first about the ticketing system that MyWorks offers. However, MyWorks had responded back within 15 minutes of their first ticket.

Jacki has dealt with many different WooCommerce integrations, and she explains that MyWorks has offered the best support that she has every encountered- "it's actually shocking, and MyWorks has made life really easy and came in impeccable timing!"



About

MyWorks Software is a creative development firm with a focus of enhancing our clients' digital presence through innovative software development and stimulating design.



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