

QSalesData Version 3.2 Release Notes

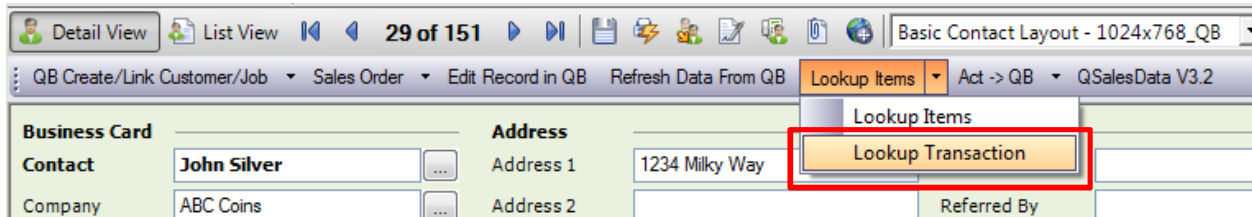
Overview of Fixes and Enhancements included in this build:

Note: If you are upgrading from a 2.x version of QBSalesData you will be prompted to enter your version 3.0 serial numbers after installing this version. This version requires version 3.0 serial numbers. If you have a current maintenance plan with us, you will have had the serial numbers emailed to you. If you can't locate your version 3.x serial numbers, send us an email at support@effsolutions.com.

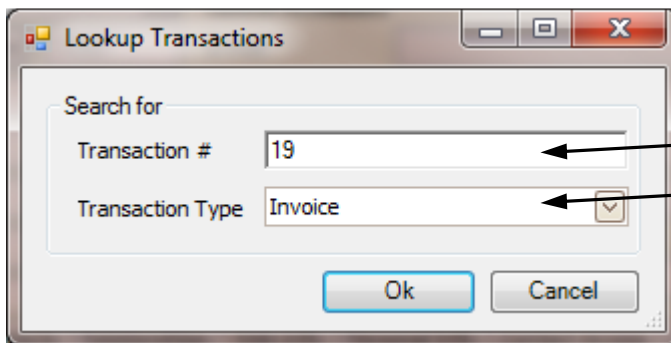
If you are already on a 3.x version, you will not be prompted for a serial number.

Refer to the [Workstation Update Instructions](http://www.qsalesdata.com/releasenotes/QSalesData-Workstation-Update-Instructions.pdf) to install this update at your location:

- 1. Updated the Contact Data Sync program to handle remapping of the Company and Contact fields.** If you remap the Bill To Address 1 and Bill To Address 2 fields in our SET MAPPING, typically set to Company and Contact respectively, our Contact Data Sync program and ACT > QB button on the toolbar will now be able to use those settings. The best example is if you want to have an AP Contact field on your contact record in ACT, and have that AP Contact information sync with the Contact in QuickBooks, rather than the ACT Contact field. QSalesData version 3.2 now allows you to do this.
- 2. Added a LOOKUP TRANSACTION option to the QSalesData toolbar.** This feature allows you to pull up a contact in ACT by searching a QB Transaction number, like Invoice Number or Sales Order number. **This feature has been added to the Lookup Items option on the toolbar.**



You will then get the following window:



Simply type in the Transaction Number and Type that you want to search for, and then click on OK. It will pull up the matching contact in ACT.

- 3. Build Fields check.** After you open ACT for the first time after upgrading QSalesData, our program will prompt you to run the Build Fields program (Tools > QSalesData Import) if we find that new fields need to be built to align with the new version of QSalesData. You will only need to run the Build Fields program once on your ACT database. You won't need to run it on each workstation in a multi-user implementation.

4. Additional Sales Order information added to the QB Transactions tab. The following columns now get populated on the Sales Order transaction in the QB Transactions tab:

- Sales Order Status (Pending or Invoiced)
- PO Number
- Ship Date (new column, also populates on the Invoice)

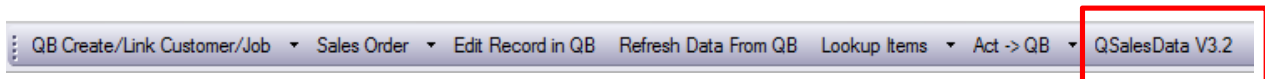
Date	Type	Number	Amount	Sales Tax	Terms	Due Date	Balance Rem...	PO	Rep	Status	Ship Date	Ship Via
12/19/2011	Sales Order	13	\$800.00	\$0.00	Net 30	1/18/2012	\$0.00	44444	DG	Pending	12/19/2011	Federal Express
4/14/2011	Sales Order	4	\$7,250.00	\$0.00	Net 30	4/14/2011	\$0.00	1111	DG	Invoiced	4/14/2011	UPS
2/1/2011	Sales Order	5	\$1,000.00	\$0.00	Net 30	3/3/2011	\$0.00	2222		Invoiced	2/1/2011	Federal Express

5. Added 9 new QB fields to the QB Data tab in ACT. The following fields get added when you run the Build Fields program in QSalesData version 3.2 and **will be incorporated into our Tab Installer program in the next release, right now you would have to manually enter these fields to your layout.** These fields get populated when you perform a Transaction Sync or click on the Refresh Data from QB button. They are also updated in the Nightly Sync Program process. It is a 1-way sync to these fields, you update them in QuickBooks, and the data is pulled into the fields in ACT.

Tax Code	QB_TaxCode
Tax Item	QB_TaxItem
Resale Number	QB_Resalenum
Job Status	QB_JobStatus
Job Start Date	QB_JobStartDate
Job Projected end	QB_JobProjEndDate
Job End Date	QB_JobEndDate
Job Description	QB_JobDesc
Job Type	QB_JobType

QB Tax Code	<input type="text" value="Tax"/>	QB Acct #	<input type="text"/>
QB Tax Item	<input type="text" value="Out of State"/>	QB Resale #	<input type="text"/>
QB Job Desc	<input type="text"/>	Job Start Dt	<input type="text"/>
QB Job Type	<input type="text"/>	Job Proj End Dt	<input type="text"/>
QB Job Status	<input type="text" value="None"/>	Job End Dt	<input type="text"/>

6. Added the QSalesData button with version to the QSalesData toolbar. You can now customize the toolbar by right-clicking anywhere on it and choosing the Customize option. You can quickly see what version of QSalesData you have installed, and if you click on the button, it takes you to the QSalesData website.



7. Added a Filter by Type option to the Create from QB screen. When you use our Create from QB option (Tools > QB Customer Link Wizard) to bring over customers from QuickBooks in to ACT, you can now filter that list by the QB Type field if you choose to only bring over customers of a specified type into ACT. Notice the new option in the screen shot below.

