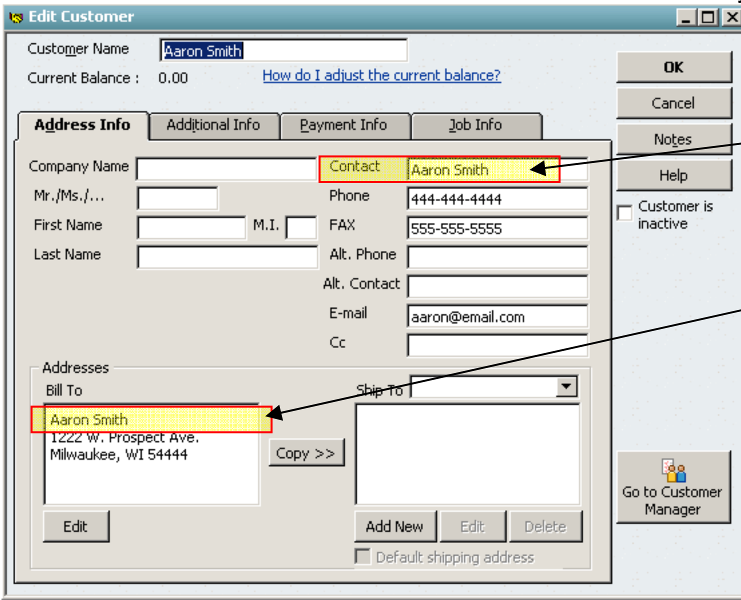
PREPARING YOUR CUSTOMER RECORD DATA IN QUICKBOOKS

If you plan on transferring QuickBooks Customer records from QuickBooks into ACT, you want to make sure that your data is filled in appropriately in QuickBooks so that it can map properly into ACT.

Note: This is only important if you are going to push field data from QB to ACT or use our Create from QB function. If you are going push contact data syncs from ACT to QB, ignore this section.

Minimum requirements for an Individual Person record in QuickBooks

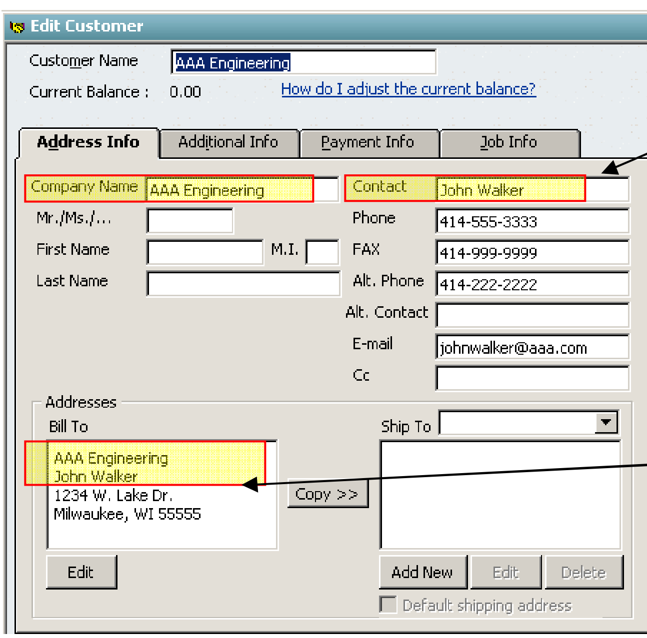
For a Person record in QuickBooks, you need to at least have the Contact field filled out, and the Contact name needs to match the first line of the Bill To address exactly.



If you have Individual People setup as Customers in Quickbooks, you need to have them setup like the screen shot to the left. At a minimum, you need to have the Contact Name field filled out, and the first line of the Bill To address needs to match the Contact Name.

Minimum requirements for a Company record in QuickBooks

For a Company record in QuickBooks, you need to at least have the Company and Contact fields filled out. The top of your billing address should match the Company, Contact or both so they don't get pushed to ACT as Address lines.



For Company records in Quickbooks, you should have both the Company and Contact fields populated. QSalesData compares the top lines of the Bill To address to the Company and Contact fields in QB, and if they match, it will know that it is not an Address line and skip it.

Either style will work for a Bill To address, just as long as the Company and/or Contact data matches data in the Company and/or Contact fields.