



QSalesData - Quickbooks Link for Act!

**Changing the Way
Small Businesses
Do Business!**

QSalesData Developed By:

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Take your Business to the Next Level of Efficiency. Link your Act! and Quickbooks applications together to eliminate double-entry and make your Act! Users more productive. **DO MORE WITH LESS.**

- Link Records between Act! and Quickbooks
- Synchronize Contact field updates between Act! and Quickbooks
- Create QB Customers from Records in Act!
- Create Quickbooks Invoices, Estimates, Sales Orders and Sales Receipts from Act!
- **Convert Act! Opportunities to QB Transactions**
- **QB Item List syncs to Act! Product List**
- View Quickbooks Sales Transactions in Act!
- View the last 5 Years of Sales Totals in Act!
- View Past Due Balance information and Last Invoice Date in Act!
- Data resides in Act! fields so your Act! users won't need access to QB to view Sales Data in Act!
- All Data Synchronizes out to Act! Remote Databases

Visit
www.qsalesdata.com
to view our 8 min
Product Video

Sage ACT!

Back Forward New Call Meeting

Detail View 19 of 128

QB Create/Link Customer/Job Invoice Edit Record in QB Refresh Data From QB Lookup Item Lookup Jobs Lookup Parent

Business Card

Contact Bob Meyers
Company ABC Electric
Title
Department
Salutation Bob Country
Phone (555) 555-5555 Fax (555) 555-5555
Mobile (555) 555-5555 Personal E-mail

Status
ID/Status
Referred By
Latest Activities
E-mail
Call Attempt/Read
Meeting
Letter Sent

1224 N. Mequon Rd
Suite 300
Mequon WI 53091
7777

QB ID 8000005F-1257787653 **Past Due Balance** 26,574.15

	Current Year	Last Year	2 Years Ago	3 Years Ago	4 Years Ago
Total Balance	26,574.15	Total Sales 4,395.00	Total Sales 844.80	Total Sales 0.00	Total Sales 0.00
Balance 0-30	300.00	YTD Sales 34,297.15	YTD Sales 0.00	YTD Sales 0.00	YTD Sales 0.00
Balance 31-60	12,086.13	January 12,118.00	January 0.00	January 0.00	January 0.00
Balance 61-90	633.60	February 9,159.42	February 0.00	February 0.00	February 0.00
Balance 91-120	0.00	March 0.00	March 0.00	March 0.00	March 0.00
Balance 121 +	13,554.42	April 0.00	April 0.00	April 0.00	April 0.00
		May 0.00	May 0.00	May 0.00	May 0.00
		June 2,528.80	June 0.00	June 0.00	June 0.00
		July 10,490.93	July 0.00	July 0.00	July 0.00
		August 0.00	August 0.00	August 0.00	August 0.00
		September 0.00	September 0.00	September 0.00	September 0.00
		October 0.00	October 0.00	October 0.00	October 0.00
		November 0.00	November 0.00	November 0.00	November 0.00
		December 0.00	December 4,395.00	December 0.00	December 0.00

QB Cust Name ABC Electric
QB Record Type Customer
QB Parent ID
QB Primary Contact

Last Invoice Date 7/12/2011
First Invoice Date 11/9/2009
Last Payment Date 8/19/2011
Last Payment Amt 2,959.00
Avg Sale Amt 1,976.85
Lifetime Sales Amt 39,536.95

QB Terms Net 30
QB Credit Limit 0.00
QB Type Referral
QB Price Level Level A
QB Rep DG
QB Acct #

Activities Opportunities History Notes Documents Groups/Companies Secondary Contacts Relationships Web Info Personal Info Contact Access User Fields QB Data QB Transactions QB Items Marketing

Create Quickbooks Customers from records in Act!
Generate Quickbooks transactions from within Act!

QSalesData calculates the Last 5 yrs of Sales Totals, Past Due Balance Totals, Last Invoice Date and other key QB data and stores it in a QB Data tab in Act!



Key Benefits

We are the **ONLY** Quickbooks Link product that brings data into fields in Act! Having the data in Act! fields let's you take full advantage of the information:

Use QB data to perform key lookups and create Dynamic Groups in Act!
 • Customers with Past Due Balances
 • Customers that haven't ordered in 6 mo.
 • Customers that spent more than a certain amount with you last year

Include QB data in Act! Reports
 Merge QB data in letter/email templates
 Include QB data in dashboard utilities

Use the Act! Layout Designer to display your QB fields anywhere on your Act! screen. (you can put the Past Due Balance field at the top of your layout and make it BOLD and RED)

Because the QB data is updated in a nightly synchronization process, access to the data is fast. We don't have to talk to QB every time we want to see the QB data.

All of the QB Data we bring into Act! synchronizes out to any Act! remote databases you may have.

We are the **ONLY** QB Link product that includes a QB Items tab.

System Requirements

Act! Versions
 Act! 2010 higher
 (PRO and Premium versions)

Quickbooks US Versions
 QuickBooks version 2007 and higher
 (Basic, Pro, Premier, Enterprise version)

Quickbooks CANADA and UK Versions
 QB 2010 and higher
 (Basic, Pro, Premier, Enterprise versions)

Works with 32-bit and 64-bit versions of Windows XP, Windows Vista and Win 7

Requires US, UK or Canada Versions of Act! and Quickbooks

Note: Not designed to work with Web Versions of Act! and/or QB

View QB Transactions in Act!

Date	Type	Number	Amount	Sales Tax	Terms	Balance Remaining	Due Date
4/1/2010	Estimate	7	500.00	0.00		0.00	4/1/2010
3/4/2010	Invoice	96	2131.01	113.01	Net 30	2131.01	4/3/2010
3/1/2010	Payment	23667	273.50	0.00		0.00	
2/26/2010	Invoice	94	516.80	16.80	Net 30	516.80	3/28/2010
2/10/2010	Payment	2225	250.00	0.00		0.00	
1/13/2010	Invoice	84	1100.00	0.00		0.00	
12/30/2009	Payment	22222	2222.00	0.00		0.00	
11/16/2009	Invoice	61	300.00	0.00		0.00	
11/16/2009	Invoice	62	300.00	0.00		0.00	
10/14/2009	Estimate	4	200.00	0.00		0.00	

QB Items tab displays Products Purchased

Invoice	Invoice Date	Item Desc	Qty	Price	Amount
Item Num: Adobe Photoshop					
Item Num: Backup Exec					
29	3/5/2008	Backup Exec Software.	1	695	695
Item Num: Consulting-100					
Item Num: Dell Server					
119	5/4/2010	Dell Server			
61	11/16/2009	Dell Server			
29	3/5/2008	Dell Server			
Item Num: MS Office 2007					

Convert Act! Opportunities to QB Transactions

Convert To Invoice

- Convert To Invoice
- Convert To Estimate
- Convert To Sales Order
- Convert To Sales Receipt

Association

- Contacts: Colleen McCarthy
- Groups
- Companies

Days Open

Open Date: 5/14/2010
 Days Open: 0
 Est. Close Date: 5/14/2010
 Act. Close Date: 5/14/2010

Process/Stage

Process: ACT! Sales Cycle
 Stage: Initial Communication

QB ID: 80000003-1254343857
 QB Trans ID: 359-1273843361
 QB Trans Type: Invoice