



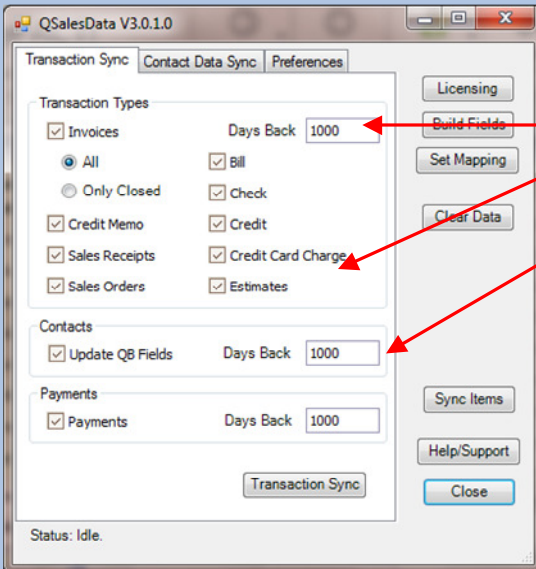
Core Functionality built into QSalesData Quickbooks Link for ACT!



QB Transaction Import Process

(Tools > QSalesData Import > Transaction Sync Tab)

This feature imports Quickbooks Data into ACT



Adjust the Days Back Filters, and the Transaction filter to determine what QB Transactions get imported into ACT!

Click on the **TRANSACTION SYNC** Import data and here What QBSalesData Does

Using the criteria you specified, QBSalesData will pull in the appropriate transactions from Quickbooks for all linked records in ACT. (all records that have a QB_Internal ID)

New Transactions will appear in the QB Transactions Tab in ACT, and new item information will appear in the QB Items tab in ACT

All of the field information on the QB Data tab will be updated as well. (Last Invoice Date, Past Due Balances, 5 yrs of Sales Totals, etc.)

Contact Data Sync Process

(Tools > QBSalesData Import > Contact Data Sync Tab)

Use this feature to sync contact address data between ACT and QB

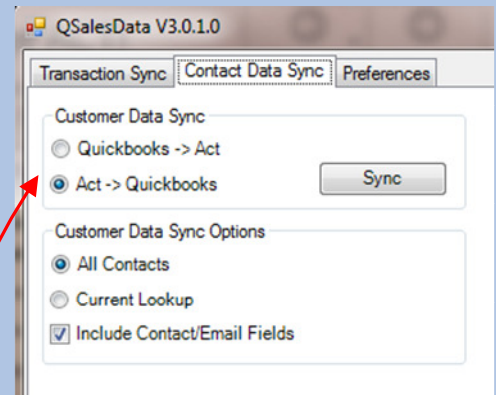
QB_PrimaryContact

Check the QB_PrimaryContact field checkbox in ACT to pick the records in ACT you want to use to sync Address information between ACT and Quickbooks

We recommend telling your ACT users to always make customer address changes in either ACT or Quickbooks. Pick one or the other. You will then be able to push changes from ACT to QB or vice versa.

When you have the QB_Primary Contact field tagged on the appropriate contacts in ACT, you can then use the Contact Data Sync feature in QBSalesData by going to Tools > QBSalesData Import and go to the Contact Data Sync Tab.

You can click on the SET MAPPING button to verify how your Quickbooks and ACT fields are mapped to each other.



From the Contact Data Sync Screen you simply pick the direction you want to push address changes, and whether you want to run it against all contacts or just the current lookup in ACT.

When you click on the SYNC button the address field data in ACT will overwrite QB or vice versa based on the direction selected. Only records that are linked to Quickbooks and have the QB_PrimaryContact field checked are affected by this process.