



QSalesData Product Feature Chart

- Link ACT! Contacts and Companies to QB Customer Records	(QB)
- QB Customer Link Wizard to link records all at once	(QB)
- Link ACT! Contacts and Companies to QB Vendor Records	(QB)
- QB Vendor Link Wizard to link records all at once	(QB)
- Automatic sync of your QB Transactions into ACT! each night	(QB)
<i>(runs in windows scheduler, can be configured to run on a server without QB open)</i>	
- Synchronize Customer Address Field Changes between ACT! and Quickbooks (Contact Data Sync)	(QB)
<i>Map fields to be updated</i>	
<i>Tag which Company and Contact Records get updated when information changes</i>	
<i>Run Update process for Current Lookup or All Contacts</i>	
- Create Invoices, Estimates, Sales Orders, Sales Receipts, Credit Memos from Contact Record in ACT!	(QB)
- Create QB Customer from a record in ACT!	(QB)
- Create ACT! Records from Quickbooks Customer Records	(QB)
- Quickbooks Sales Related Fields sync to fields in ACT!	
<i>Last 5 Years of Monthly Sales Totals</i>	
<i>5 Years of YTD and Year End Totals (recalc with each data update)</i>	
<i>Last Invoice Date, First Invoice Date, Lifetime Sales Amt, Last Payment Amt, Last Payment Date</i>	
- The Following A/R Related Fields sync to fields in ACT!	
<i>Credit Limit, Balance 0-30, Balance 31-60, Balance 61-90, Balance 91+, Total Past Due Balance, Total Balance</i>	
- The Following QB Account Fields sync to fields in ACT!	
<i>Account No., Terms, Type and Rep and you can also map and sync QB Custom Fields to ACT</i>	
- QB Data fields can exist on both Company and Contact Records	
- Quickbooks Transactions Tab in ACT! includes:	
<i>Invoices, Estimates, Sales Orders, Sales Receipts, Payments and Credit Memos</i>	
- Double-Click on Invoice Transactions in ACT! to see the line item details	
- All Data exists in ACT! and synchronizes out to remote databases!!!	
- All Data is stored in ACT fields and Tables so you can:	
<i>Add QB Data fields to the Contact List View</i>	
<i>Use QB Data fields to create Dynamic Groups</i>	
<i>Add QB Data fields to Reports, Dashboards, and sync to smartphone</i>	
Features that have (QB) designator require the Quickbooks client to be installed and open on the computer	

Software Version Requirements: ACT! 2010 or higher. Quickbooks version 2007 or higher (Includes Basic, Pro, Premier and Enterprise). Not designed to work with Web versions of ACT! or Quickbooks. US Versions Only.

Annual Maintenance: Your first year of software maintenance is included in your license price. This gives you QBSalesData updates throughout your first year as new versions of ACT and Quickbooks are released. After the first year, you will be billed for maintenance \$30 per license on an annual basis.

QSalesData is developed by: Effective Solutions

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