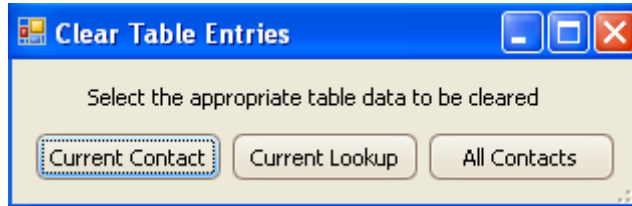


QBSalesData Version 2.0.7.4 Release Notes

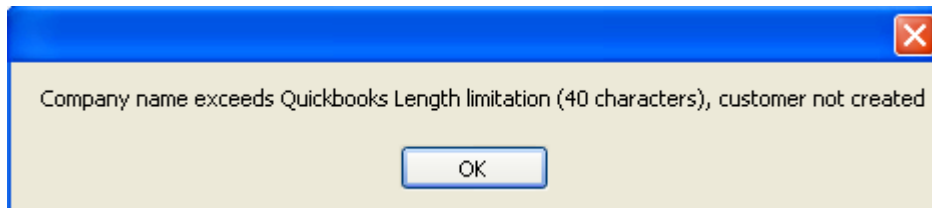
Overview of Fixes and Enhancements included in this build:

- 1. Enhanced “Clear Data” option :** In some cases you may have linked an ACT record to the wrong customer in Quickbooks, or you deleted a transaction in QB and you need to clear the data in the QB Transactions tab and resync the transaction data. We have added functionality to the Clear Data button. You can access the Clear Data function by going to TOOLS > QBSALESDATA IMPORT in ACT. You will get the following options:



Once you clear the data, you can click on the REFRESH FROM QB button or run a Transaction Sync (Tools > QBSalesData import) to bring down the data again from Quickbooks.

- 2. Added Bill To Address 5 to SET MAPPING window :** For users that are pulling customers in from Quickbooks to ACT using our CREATE FROM QB feature, you can now map a third address line from QB to ACT in the SET MAPPING window. If you don't have an Address 3 field that you need to maintain in ACT, you can leave this line unmapped.
- 3. Inactive Customers and Jobs were showing up in the initial search when running the QB Create/Link feature and selecting the LINK option.** Adjusted the code so that Inactive Customers and Jobs do not appear in the list.
- 4. Added logic to tell you when the ACT Company Name is too long for Quickbooks.** The maximum length of the Customer Name in Quickbooks is 40 characters, yet ACT lets you enter in a Company Name up to 128 characters. We added the following error message when you try to create a customer in Quickbooks and the Company name is too long.



- 5. (ACT 2010 Users Only) Syncing of QB Items to the ACT Opportunity list has been enhanced.** Added handling for sub items in the list. When there are sub items in the QB item list, we concatenate the Main Item and Sub item together, separated by a colon, just like Quickbooks does it. So when the list is synchronized down to ACT it will be structured like the image below.

Item #	Name	Price
CONSULTING:DG-150-TAX	CRM Consulting Services (CONSULTING:DG-150-TAX)	\$150.00

To improve the performance of the syncing the QB Items list, we also prompt to clear out the existing Product list in ACT before the sync. We recommend doing this. This will make sure your ACT Product list always matches your Quickbooks items list.

- 6. (ACT 2010 Users Only) Updates to the Product Name in the ACT Opportunity now transfer over when the Opportunity is converted to a QB Transaction.** The ACT user can now make adjustments to the Product Name in the ACT Opportunity and those changes will be retained when the Opportunity is converted to a QB Transaction. It will be carried over to the Item Description on the QB Transaction.
- 7. (ACT 2010 Users Only) When converting multiple Opportunities to QB Transactions from the Opportunity list in ACT you no longer prompted to see each transaction in QB.** Converting multiple invoices no longer gives you individual prompts for each opportunity that was converted, and simply tells you that the opportunities were converted when they are all complete.
- 8. (ACT 2010 Users Only) Fixed issue where Inventory Items were set to zero price when converted to QB Transactions.** If you had inventory items in your QB item list and thus your ACT Product list, when you converted them to QB Transactions, the pricing would be lost. All prices were set to zero. This was fixed, and the prices now come over correctly during the conversion process.
- 9. (ACT 2010 Users Only) Fixed issue where QB items with long descriptions (255 characters) were not being synced down to the ACT Product list.** The QBSalesData program will now truncate the description so it will download properly into the ACT Product list.