

# QBSalesData Version 2.0.7.7 Release Notes

## Overview of Fixes and Enhancements included in this build:

**Note: This version does not include any new fields. You do not need to run the Build Fields program. You can simply upgrade your workstations to benefit from the updated features. Simply close out of ACT and install over your existing version of QBSalesData.**

1. **Fixed issue with Custom QB fields at the item level showing up on the wrong line of the QB Items tab.** In some cases, QB item custom fields were showing up on the wrong rows of the QB Items tab, this issue was fixed.
2. **We added a new QBSalesData Tab Installer program that will automatically at the QB Data tab and fields to an existing ACT layout.** You only need to use this new feature if you haven't added your QBSalesData fields to your ACT layout yet. This feature is primarily focused on brand new implementations of QBSalesData.
  - a. This utility will take the layout file you select and save a copy of it with a \_QB at the end, it will then add a QB Data tab and fields to your layout.
  - b. Go to Tools > QBSalesData Tab Install, then choose "current layout" or pick a different layout.
  - c. You should see the layout refresh to the \_QB version and it should now instruct you to go to Tools > Design Layouts > Contacts. If it doesn't refresh, close out of ACT and go back in and switch to the new layout with the \_QB at the end.
  - d. Go into the Layout Designer as instructed, click on the QB Data tab once you are in the layout editor, and click anywhere in the tab area to add the fields to the layout.
  - e. It will let you know when it is completed. At this point simply close and say "yes" to save the layout.

The Tab Installer Utility adds the following QB Data tab to your ACT layout:

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											
QB ID	8000005F-1257787653	Past Due Balance	4,495.00	Current Year	Last Year	2 Years Ago	3 Years Ago	4 Years Ago			
QB Primary Contact	<input checked="" type="checkbox"/>	Total Balance	16,103.00	Total Sales	4,495.00	Total Sales	844.80	Total Sales	0.00	Total Sales	0.00
Last Invoice Date	1/19/2011	Balance 0-30	11,608.00	YTD Sales	12,208.00	YTD Sales	0.00	YTD Sales	0.00	YTD Sales	0.00
First Invoice Date	11/9/2009	Balance 31-60	4,495.00	January	12,208.00	January	0.00	January	0.00	January	0.00
Avg Sale Amt	2,193.48	Balance 61-90	0.00	February	0.00	February	0.00	February	0.00	February	0.00
Lifetime Sales Amt	17,547.80	Balance 91-120	0.00	March	0.00	March	0.00	March	0.00	March	0.00
QB Terms	Net 30	Balance 121 +	0.00	April	0.00	April	0.00	April	0.00	April	0.00
QB Credit Limit	10,000.00			May	0.00	May	0.00	May	0.00	May	0.00
QB Type	Referral			June	0.00	June	0.00	June	0.00	June	0.00
QB Price Level	Level A			July	0.00	July	0.00	July	0.00	July	0.00
QB Rep	DG			August	0.00	August	0.00	August	0.00	August	0.00
QB Acct #				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	844.80	November	0.00
				December	0.00	December	4,495.00	December	0.00	December	0.00

- 3. The number of QB Custom fields at the Customer level that can be mapped to ACT fields has been increased.** Previous versions of QBSalesData only allowed you to map up to 5 QB Custom fields to ACT. These are the custom fields that exist on your Quickbooks customer record on the Additional Info tab. QBSalesData version 2.0.7.7 now allows up to 7 or 10 custom fields, depending on your version of Quickbooks. Some Quickbooks versions don't let you create more than 7 custom fields on the Customer record. To map your additional custom fields, go into Tools > QBSalesData import and click on the SET MAPPING button. From the Set Mapping window, click on the DETECT CUSTOM FIELDS button, and the additional fields will show up on the list to be mapped. **For details on how to use the QB custom fields in QBSalesData, please refer to our QuickStart Guide/User Manual on the Documentation section of our website:**  
[www.qbsalesdata.com/productdocumentation](http://www.qbsalesdata.com/productdocumentation)

Refer to the section titled: "Map Quickbooks Custom Fields to ACT!"

- 4. Fixed issue where the Transaction detail window would not pop up if the Sales Receipt on the QB Transactions tab didn't have a number.** In prior releases of QBSalesData, if you created a Sales Receipt without a number, nothing would happen when you double-click on it from the QB Transactions Tab. That has been fixed in this build. You can now double-click on a Sales Receipt that doesn't have a number, and the detail screen will pop up, showing you the line items of the transaction.
- 5. Fixed issue with Company Record Sales Total fields in ACT not getting updated.** Something changed in QBSalesData 2.0.7.6 that caused the Company Level sales total fields in ACT to stop updating. This was fixed in this 2.0.7.7 build.
- 6. Adjusted QBSalesData to handle situations where the ACT Company and Contact fields were renamed.** With previous versions of QBSalesData, if you renamed your ACT Company and Contact fields, you would get a DataGridView error when you went into the SET MAPPING function of QBSalesData. You would then have to rename these fields back to Company and Contact in order to get QBSalesData to work properly. We made adjustments in QBSalesData version 2.0.7.7 that accommodate for situations where you have renamed these fields. The Set Mapping window will let you point to the fields with their new names (QB Bill To Address 1 & 2). You no longer have to change them back to Company and Contact to get QBSalesData to work.
- 7. Doubled the number of Online Videos on the QBSalesData website:**

Go to [www.qbsalesdata.com/onlinevideos](http://www.qbsalesdata.com/onlinevideos) to see our full online video library

- Videos related to installing QBSalesData
- Videos related to Linking records between ACT and QB
- Functionality Videos
- Video showing you how to use the Contact Data Sync Feature
- Videos explaining how the Opportunity to QB Transaction feature works