# QBSalesData Version 2.0.7.9 Release Notes

Overview of Fixes and Enhancements included in this build:

Refer to the Workstation Update Instructions to install this update at your location:
http://www.qbsalesdata.com/QBSalesData-Workstation-Update-Instructions.pdf

1. **Preferences tab added to QBSalesData Import section.** There are 3 main preferences that you can now set in the QBSaleData program:
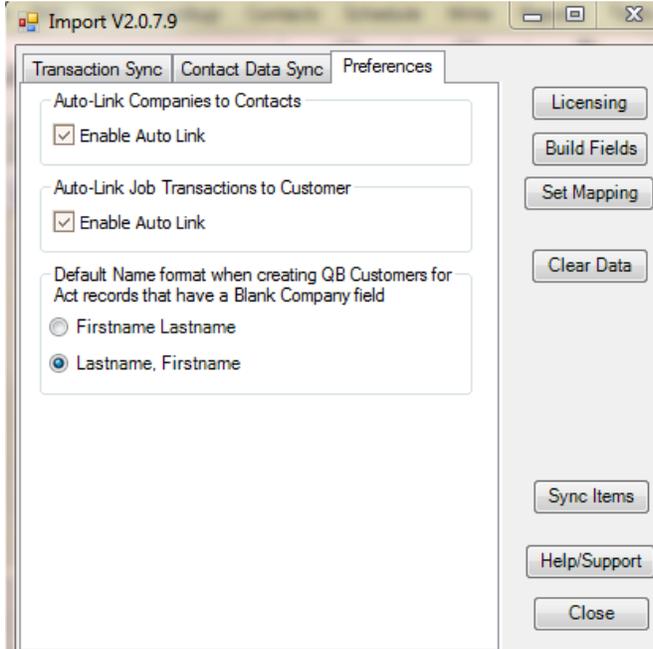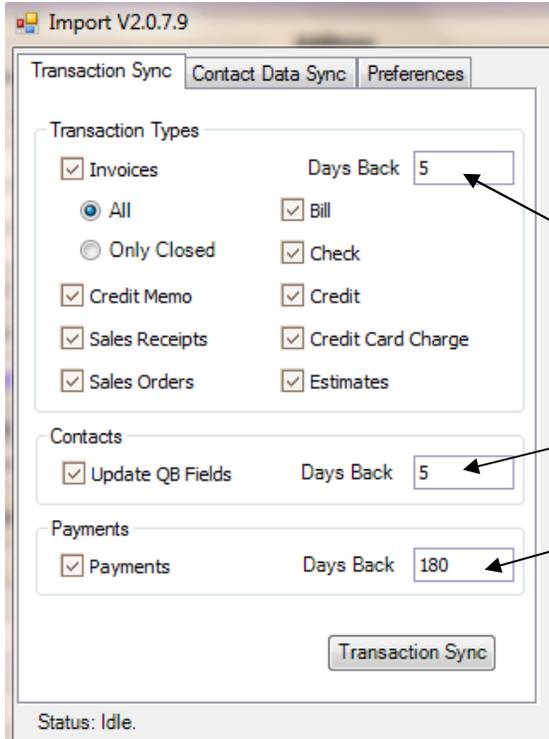

Auto-Link Companies to Contacts: This preference lets you choose whether you want other contacts and Company records to be automatically linked to the same customer in Quickbooks if they are not currently linked. This only applies if you are using Company Records in ACT. With this feature turned on, if you link one contact in ACT to the customer in Quickbooks, the next time a QBSalesData transaction sync occurs, the associated Company record and any other contacts linked to that company will also be linked to the same customer in Quickbooks. This functionality was automatically ON in prior versions of QBSalesData, but some of our customers requested the ability to turn this functionality off. If you want to turn off this auto-link functionality, simply uncheck the Enable Auto Link checkbox.

Auto-Link Job Transactions to Customer: This option only applies to customers that use the "Jobs" feature of Quickbooks. If you have this option ON, then all job transactions in Quickbooks will "roll-up" and appear under the customer record in ACT. If you have this feature turned off, then only transactions at the customer level will appear, and job transactions will be ignored in the transaction sync process. This "roll-up" feature was automatically built into prior versions of QBSalesData, but some of our customers requested the ability to turn this functionality off.

Default Name Format: This option only applies to situations where you are using our QB Create/Link feature to add a new customer to Quickbooks and the record in ACT has a blank Company field. Meaning that the record is an "individual/person" rather than a "company". This lets you set your default preference to either Lastaname, Firstname or vice versa.

2. **(Change made in version 2.0.7.8.3) Enhanced Transaction Sync functionality. Synchronizations are 5-10 times faster:** We have greatly improved the efficiency of our Transaction Sync process that includes both the manual Transaction Sync (Tools > QBSalesData Import) and the Nightly Transaction Sync program. Here is a screen shot of what the new parameters look like:

3. **Blank line at the top of the Quickbooks Customer Bill-To Address has been fixed.** In past version of QBSalesData, when you used the QB Create/Link feature to create a new QB customer and the ACT contact didn't have a company name, the QB Customer record would have a blank line at the top of the Billto Address. This has been fixed to remove the blank line at the top of the Billto Address in QB.

4. **QB Transaction Tab Display improvements:** The tab now defaults to sorting the list by Date in descending order. The saving of display preferences is also more reliable now and the defaults have been set to show all transaction types. When you first login to ACT, you still have to scroll to a second record in ACT for the default columns to display. We will be fixing that in a future release.

5. **(Change made in version 2.0.7.8.3) Past Due Balance fields are now calculated by using the Due Date of the Transactions on the QB Transactions tab:** Because the Terms of individual invoices can vary, we decided to change the way we calculate the Past Due Balance fields in ACT. Past versions were hard coded to use a 30 day period assuming Terms were equal to Net 30. We now calculate based on the Due Date value of each transaction in the QB Transactions tab, which will handle situations where the Terms of the Invoice may be set to some other value other than Net 30.

6. **(Change made in version 2.0.7.8.3) Skip Pending invoices when calculating Past Due Balance fields:** We now skip invoices that are set to "Pending" in Quickbooks when calculating our Past Due Balance fields.

7. **Multiple blank lines on Invoice and Sales Receipt transactions caused custom field data to show up on the wrong line in the QB Items tab.** This issue has been resolved. All data appears correctly on the QB Items tab.

8. **Error occurred in QBSalesData when you used the QB Create/Link button to create a new customer in Quickbooks and the email address in ACT was greater than 40 characters.** This issue has been resolved.