

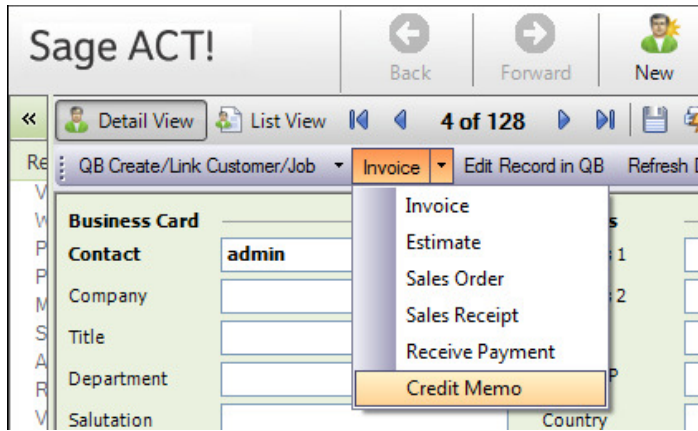
QSalesData Version 3.0 Release Notes

Overview of Fixes and Enhancements included in this build:

Note: This version requires version 3.0 serial numbers. You will be prompted to enter your version 3.0 serial numbers after installing this version. If you have a current maintenance plan with us, you will have the serial numbers emailed to you.

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

1. Changed the product name from QBSalesData to QSalesData.
2. Added support for ACT 2012 and Quickbooks 2012. If you are going to upgrade to ACT 2012 and/or Quickbooks 2012, you will need to upgrade your QSalesData software to version 3.x
3. Added a Credit Memo option to the transaction options on the QSalesData toolbar. You can now create credit memos from customer records in ACT. See the screen shot below.

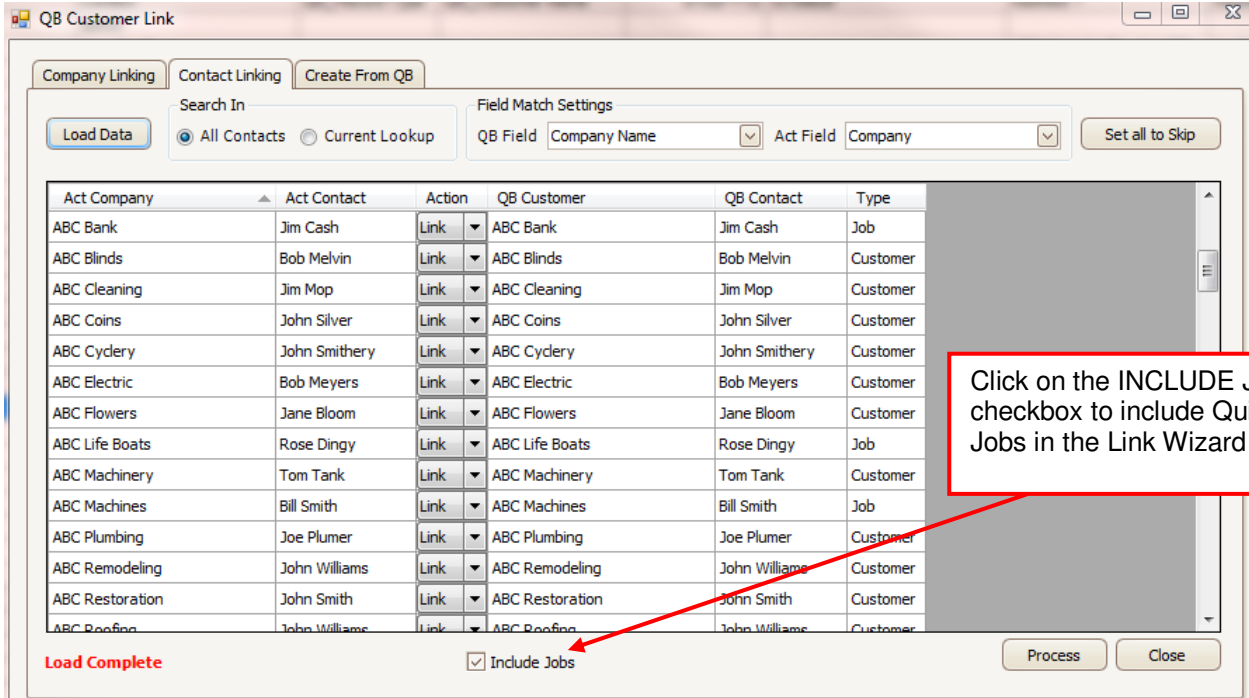


4. Added Last Payment Date and Last Payment Amount fields to the Build Fields program and to the QB Data Tab installer. After you install version 3 of QBSalesData and run the Build Fields program, you will have 2 new fields created in your ACT database: QB_Last Payment Date and QB_Last Payment Amount. You can manually add these to your existing ACT layout, or you can delete your existing QB Data tab in your layout and re-run our QSalesData Tab Install program. We will have a video available for you on our website (www.qsalesdata.com) that will take you through this update process. These 2 new fields get updated each time the transaction sync runs, or you click on the Refresh Data from QB button for a contact in ACT.

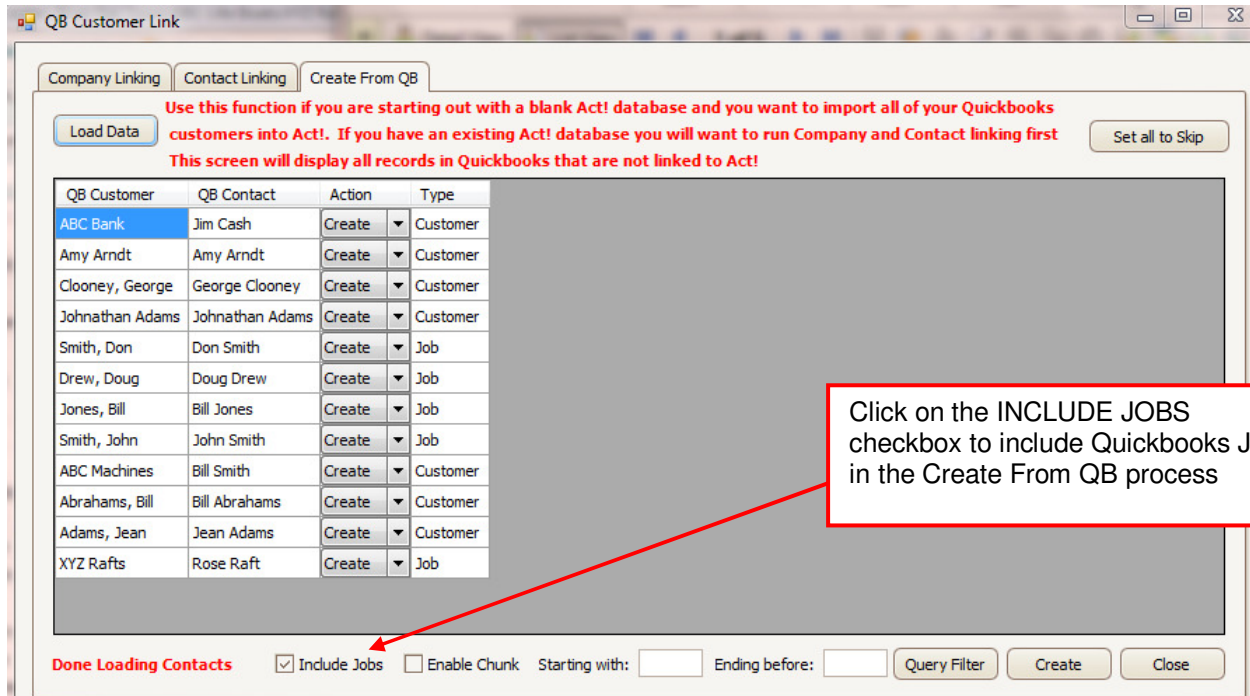
Last Payment Date	8/19/2011
Last Payment Amt	2,959.00

- 5. **Job Functionality added to the QB Customer Link Wizard screens.** For those of you that utilize Jobs in Quickbooks, you can now use the Contact Linking and Create From QB to include jobs in the list.

When you run the Customer Link Wizard, you can click on the INCLUDE JOBS checkbox to include Quickbooks Jobs in the Linking process.



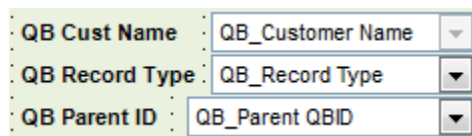
When you run the Create from QB function, you can click on the INCLUDE JOBS checkbox to include Quickbooks Jobs in the process.



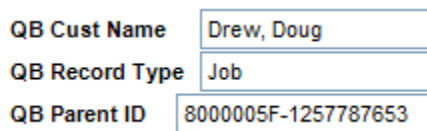
3 new fields have been added to the ACT database to handle the tracking of Jobs:

- QB_Customer Name
- QB_Record Type
- QB_Parent QBID

If you use Jobs in Quickbooks, you will benefit from adding these additional fields to your ACT layout like the example screen snippet below.



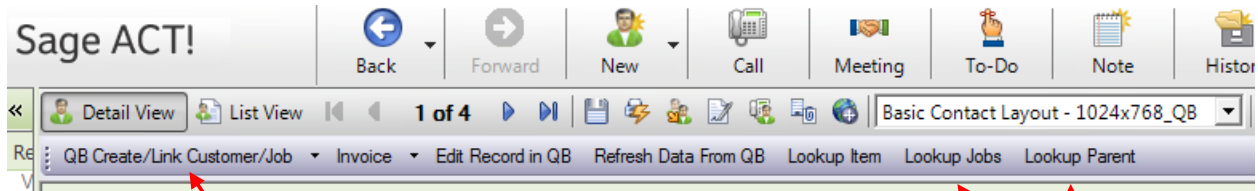
Here is what the data looks like after it syncs from QB to ACT. The fields get populated when you link records between ACT and Quickbooks.



Two new buttons were also added to the QSalesData toolbar.

Lookup Jobs button: If you are on a Parent record in ACT and it has Jobs, you can click on the Lookup Jobs button to pull up those job records in ACT.

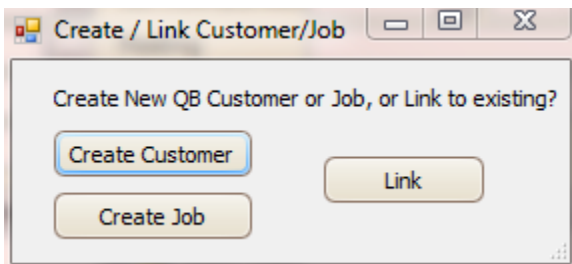
Lookup Parent button: If you are on a Job record in ACT, you can quickly jump to the Parent record in ACT by clicking on the Lookup Parent button.



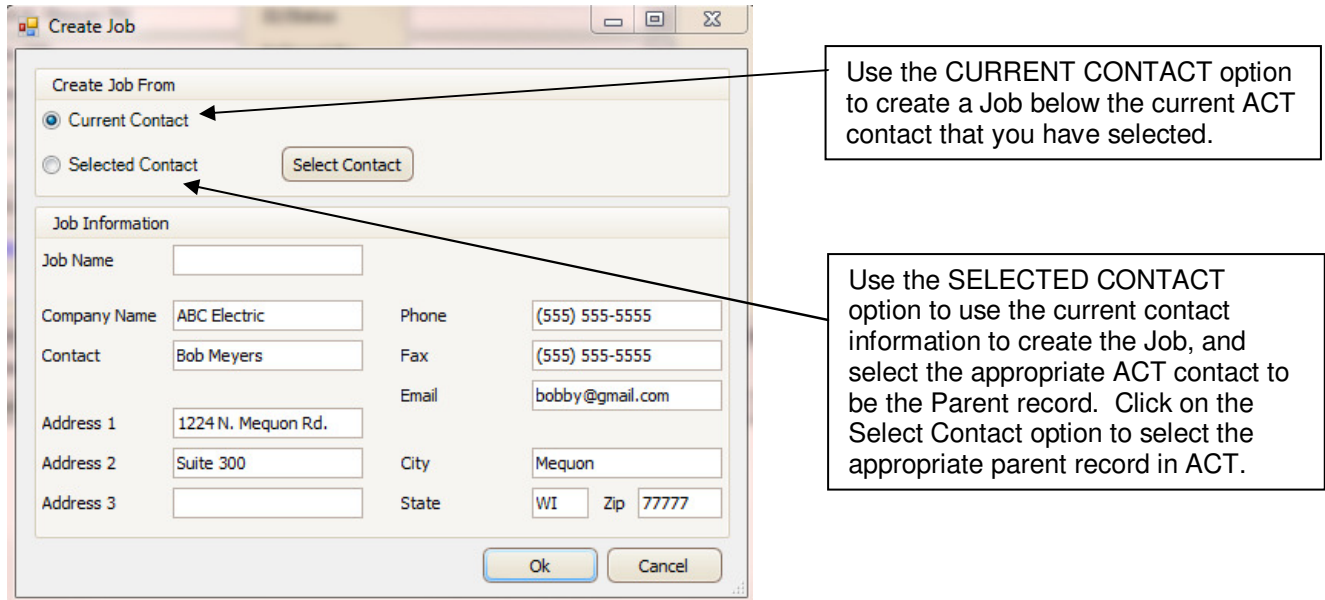
Updated the Create/Link Customer button to include Job Functionality

Two new buttons were added to the QSalesData toolbar to allow you to Lookup Jobs and Lookup Parent records within ACT.

Added Job Functionality to the Create/Link Customer button: We have enhanced the way you can add jobs to Quickbooks from ACT. When you click on the QB Create/Link Customer/Job button you will get the following window:



When you click on the Create Job button you will get the following window:



CURRENT CONTACT: Use this option if you are sitting on the Parent Record for the Job in ACT. It will pull all of the information from the current ACT contact to populate the Job info. When you click on OK, the new job will be created in Quickbooks, and a new contact record will be created in ACT for the job and it will be linked to the job in Quickbooks.

SELECTED CONTACT: Use this option if you are sitting on the Job Record in ACT. Meaning that you have already entered in a contact in ACT that represents the Job, and you want to use this information to create the job. Click on the Select Contact option to select the appropriate parent record in ACT. When you click on OK, the job will be created under the selected Parent Record in QB and all of the appropriate linking will be done in ACT.