

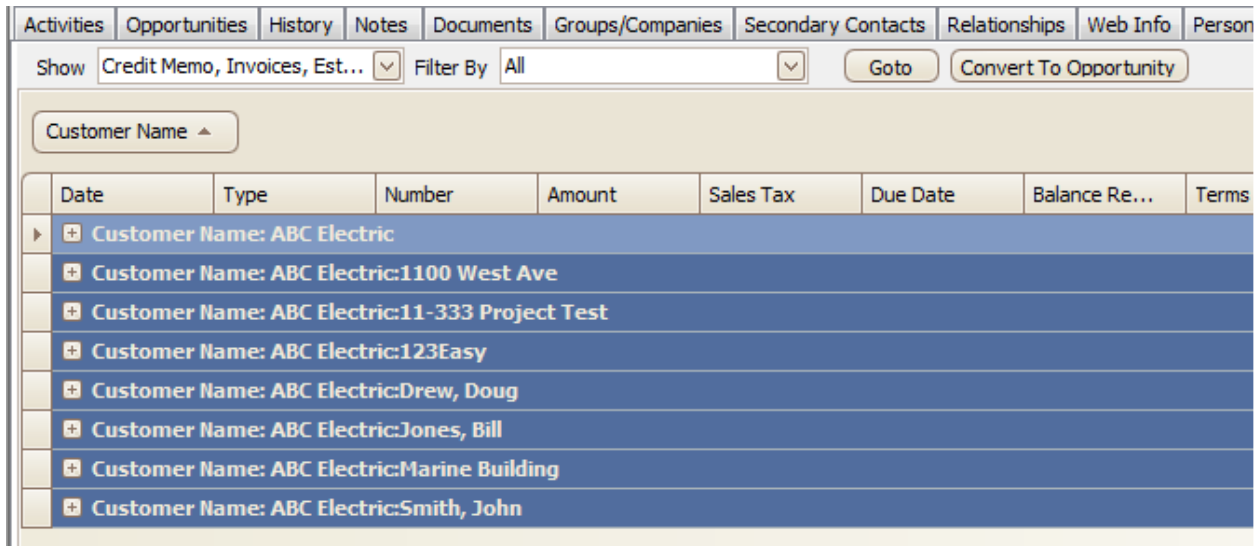
QSalesData Version 3.01 Release Notes

Overview of Fixes and Enhancements included in this build:

Note: If you are upgrading from a 2.x version of QBSalesData you will be prompted to enter your version 3.0 serial numbers after installing this version. This version requires version 3.0 serial numbers. If you have a current maintenance plan with us, you will have had the serial numbers emailed to you. If you can't locate your version 3.x serial numbers, send us an email at support@effsolutions.com.

Refer to the [Workstation Update Instructions](http://www.qsalesdata.com/releasenotes/QSalesData-Workstation-Update-Instructions.pdf) to install this update at your location:

1. Changed code to include Sales Receipt Transactions when calculating the Last Payment Date and Last Payment Amount fields on the QB Data tab.
2. Credit Memos were coming over to the QB Transactions tab with a zero remaining balance. Made adjustment so that the balance remaining value was actually a negative amount.
3. The Job Auto-Link Preference (Tools > QSalesData Import > Preferences tab) was not pulling in the job records from Quickbooks if the jobs did not exist as contacts in ACT. Fixed this issue. All jobs now rollup under the customer record in ACT if this option is selected. See the screen shot below for an example of transactions grouped by Customer Name/Job.



The screenshot shows a software interface with a menu bar at the top containing: Activities, Opportunities, History, Notes, Documents, Groups/Companies, Secondary Contacts, Relationships, Web Info, and Person. Below the menu bar, there is a 'Show' dropdown menu set to 'Credit Memo, Invoices, Est...', a 'Filter By' dropdown set to 'All', and two buttons: 'Goto' and 'Convert To Opportunity'. A search box labeled 'Customer Name' is positioned above a table. The table has columns for Date, Type, Number, Amount, Sales Tax, Due Date, Balance Re..., and Terms. The table content is grouped under the customer name 'ABC Electric' and lists several job-specific entries:

Date	Type	Number	Amount	Sales Tax	Due Date	Balance Re...	Terms
Customer Name: ABC Electric							
Customer Name: ABC Electric:1100 West Ave							
Customer Name: ABC Electric:11-333 Project Test							
Customer Name: ABC Electric:123Easy							
Customer Name: ABC Electric:Drew, Doug							
Customer Name: ABC Electric:Jones, Bill							
Customer Name: ABC Electric:Marine Building							
Customer Name: ABC Electric:Smith, John							

4. Added preference (Tools > QSalesData Import > Preferences tab) to include Pending Invoices in the Last Invoice Date and Past Due Balance fields calculations. Also added this preference to the Nightly Sync Program options (QBTransactionSync).

Include Pending Invoices in Sales Totals

Include Pending Invoices