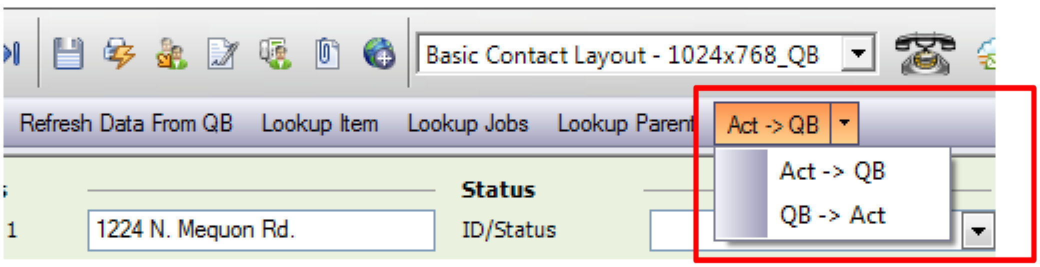
# QSalesData Version 3.1 Release Notes

**<u>Overview of Fixes and Enhancements included in this build:</u>**

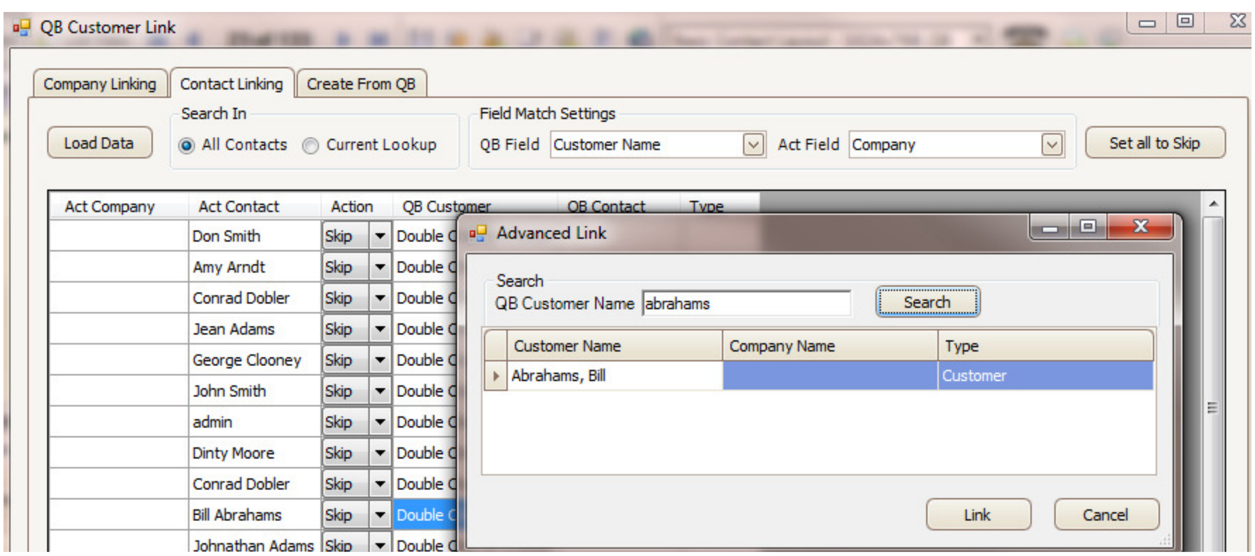
**Note: If you are upgrading from a 2.x version of QBSalesData you will be prompted to enter your version 3.0 serial numbers after installing this version. This version requires version 3.0 serial numbers. If you have a current maintenance plan with us, you will have had the serial numbers emailed to 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 to install this update at your location:**
**http://www.qsalesdata.com/releasenotes/QSalesData-Workstation-Update-Instructions.pdf**

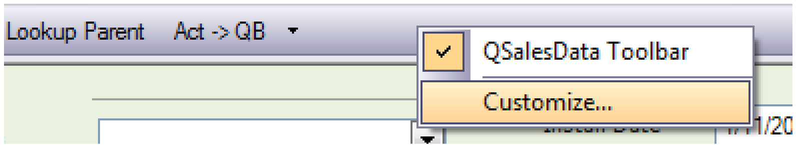
1. **Added a button to the QSalesData toolbar that allows the user to quickly sync the address information of the current contact with Quickbooks.** The new button is at the end of the QSalesData toolbar and allows you to select either ACT > QB or QB > ACT. When you click the button it will take the ACT address info and overwrite the customer info in Quickbooks, or vice versa. **You need to have Quickbooks open for this feature to work.**



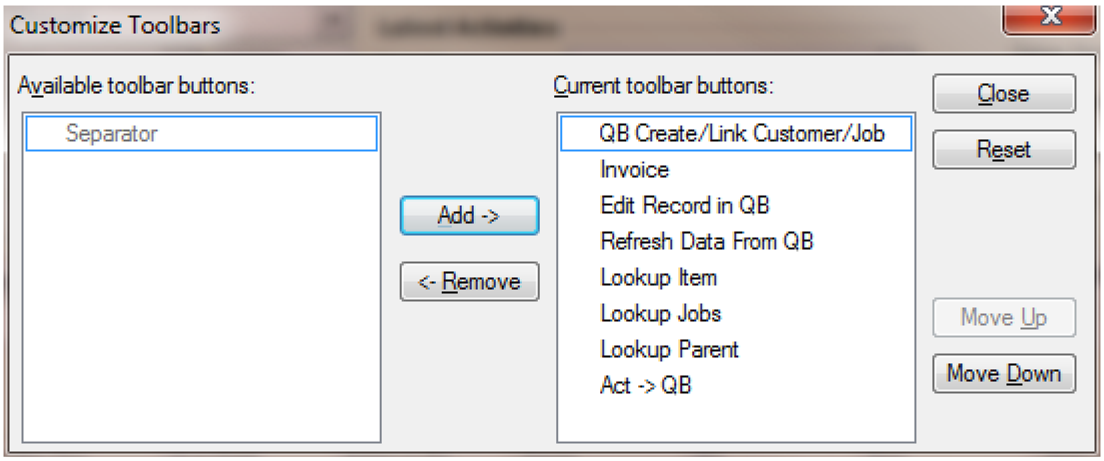

2. **Fixed an issue with the "Double-Click to Choose" functionality in the QB Customer Link Wizard.** In previous versions of QSalesData there was a bug when using the Double-Click to Choose option, it only brought up records that started with "Z". This has been resolved. You now get the following search screen when you use the Double-Click to Choose option. You can then type in your search criteria and click on the Search button to find the matching record in Quickbooks.



3. **Added customization capabilities to the QSalesData toolbar.** You can now customize the toolbar by right-clicking anywhere on it and choosing the Customize option.

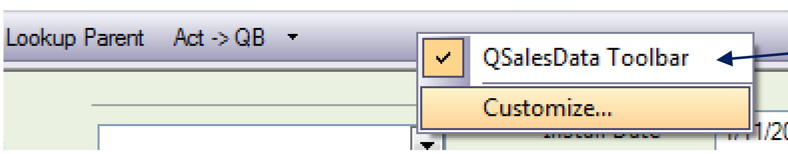



The following customization window will pop up.



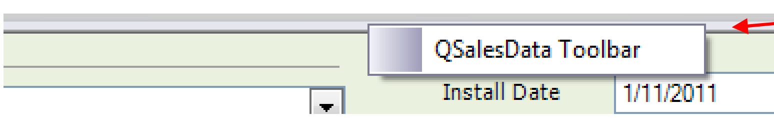

You can then choose which buttons you want to display on your QSalesData toolbar. For example, if you don't use Jobs in Quickbooks, you can remove the Lookup Jobs and Lookup Parent buttons from the toolbar. **The customization settings you make are specific to your computer.**

You can also hide the QSalesData toolbar completely by unchecking the QSalesData Toolbar option.



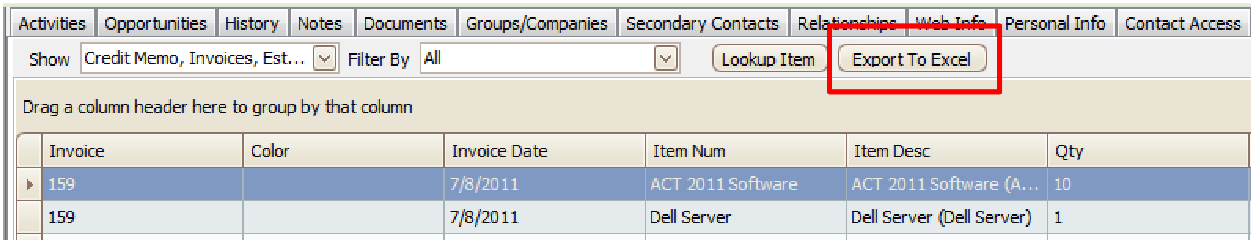

You can click on the QSalesData Toolbar option to uncheck it, and make the Toolbar disappear.

To make the toolbar reappear you will



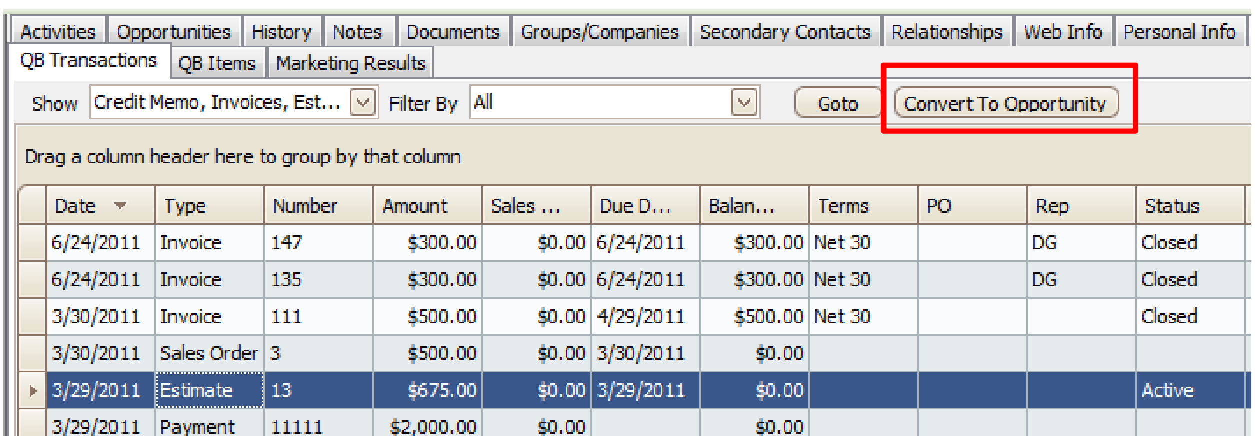

To make the QSalesData toolbar re-appear you need to right click right on the divider line until you get the QSalesData Toolbar prompt and click on it to turn it back on.

**4.** Added an EXPORT TO EXCEL button to the QB Items tab. In some cases you may want to export your customers Items purchased to Excel for further analysis. We have added a Export to Excel button to the QB Items tab. Click the button the the Item data for the current contact will be exported to Excel.




**5. Convert Estimates and Invoices from the QB Transactions tab to Opportunities in ACT.** We have some customers that wanted to continue to create Estimates in Quickbooks because their salespeople were used to the process, but they wanted to be able to convert the estimate to an Opportunity in ACT. We added a Convert to Opportunity button to the QB Transactions Tab in ACT to do just that.

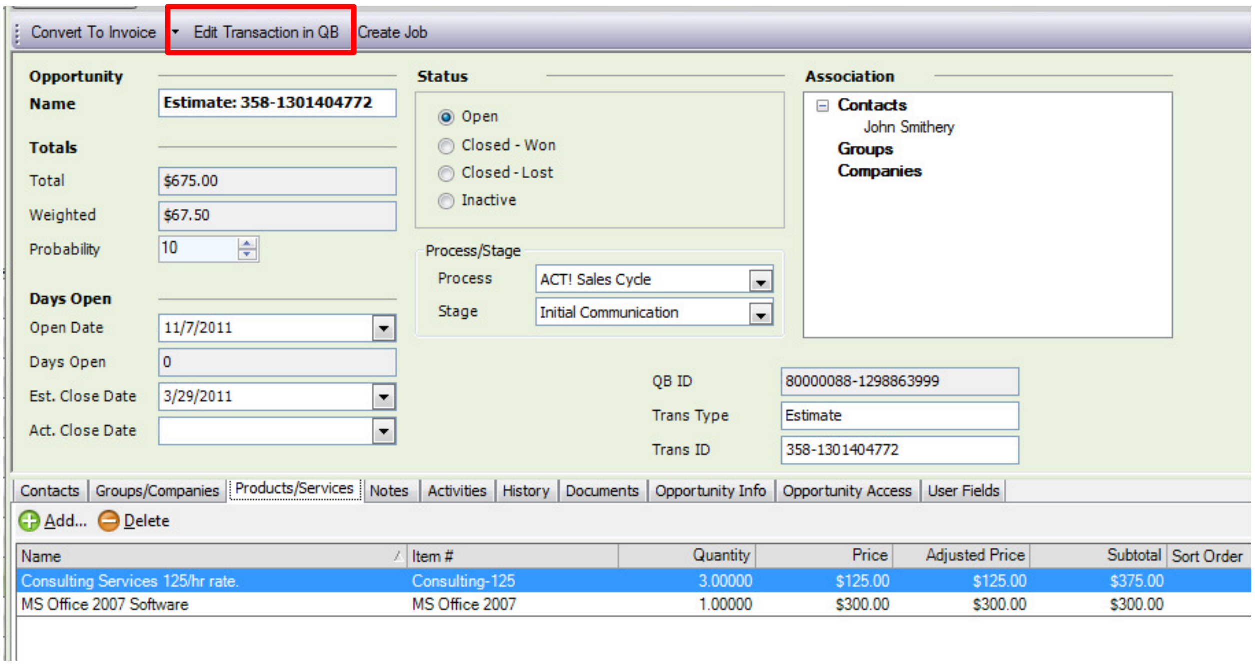
You can simply select an Invoice, Estimate or Sales Order from the QB Transactions list and then click on the CONVERT TO OPPORTUNITY button and it will take the information from the transaction and build an associated Opportunity for it in ACT.



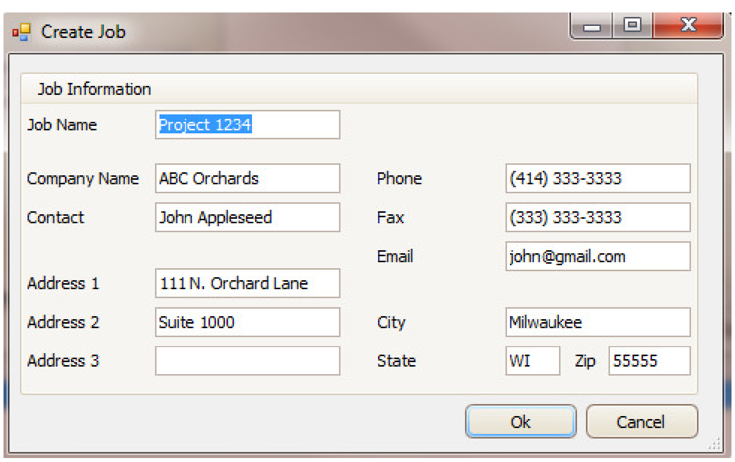

After you click on the CONVERT TO OPPORTUNITY button, it will take you to the Opportunity that was just created so you can enter in an Estimated Close date and Stage for the Opportunity.

The screen shot below is what the Opportunity will look like after it has been created. Notice that the Line Items from the QB Transaction have been transferred to the Products/Services section of the Opportunity, and the Opportunity Total amount should match your Quickbooks transactions.

From this point the user can manage the Sales Opportunity in ACT until it is sold. The backoffice user that has Quickbooks on their computer can also click on the EDIT TRANSACTION IN QB button to pull up the Estimate in Quickbooks and quickly convert it to an Invoice if approriate.




6. **Added a CREATE JOB button to the QSalesData toolbar on the Opportunity View.** For our customers that use Jobs in Quickbooks, but don't want to create a record in ACT for each Job in Quickbooks, we added a CREATE JOB button to the QSalesData toolbar on the Opportunity window. When you click on the Create Job button, it will pop up get the information from the contact record that is linked to the Opportunity, and let you create a Job record in Quickbooks under that Customer.




From here you can enter in the Job Name and change any of the other information you need to, and when you click on OK, it will create a Job in Quickbooks underneath the Contact/Customer that was linked to the Opportunity.

You Opportunity is now associated with the Job in Quickbooks. You can then click on the Convert to Invoice button on the Opportunity, and it will create the Invoice underneath the Job you just created.