

QSalesData Version 4.0 Release Notes

(Released in August of 2012)

Overview of Fixes and Enhancements included in this build:

Note: If you are upgrading from a 2.x or 3.x version of QBSalesData you will be prompted to enter your version 4.0 serial numbers after installing this version. This version requires version 4.0 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 4.x serial numbers, send us an email at support@effsolutions.com.

Refer to the Workstation Update Instructions to install this update at your location:

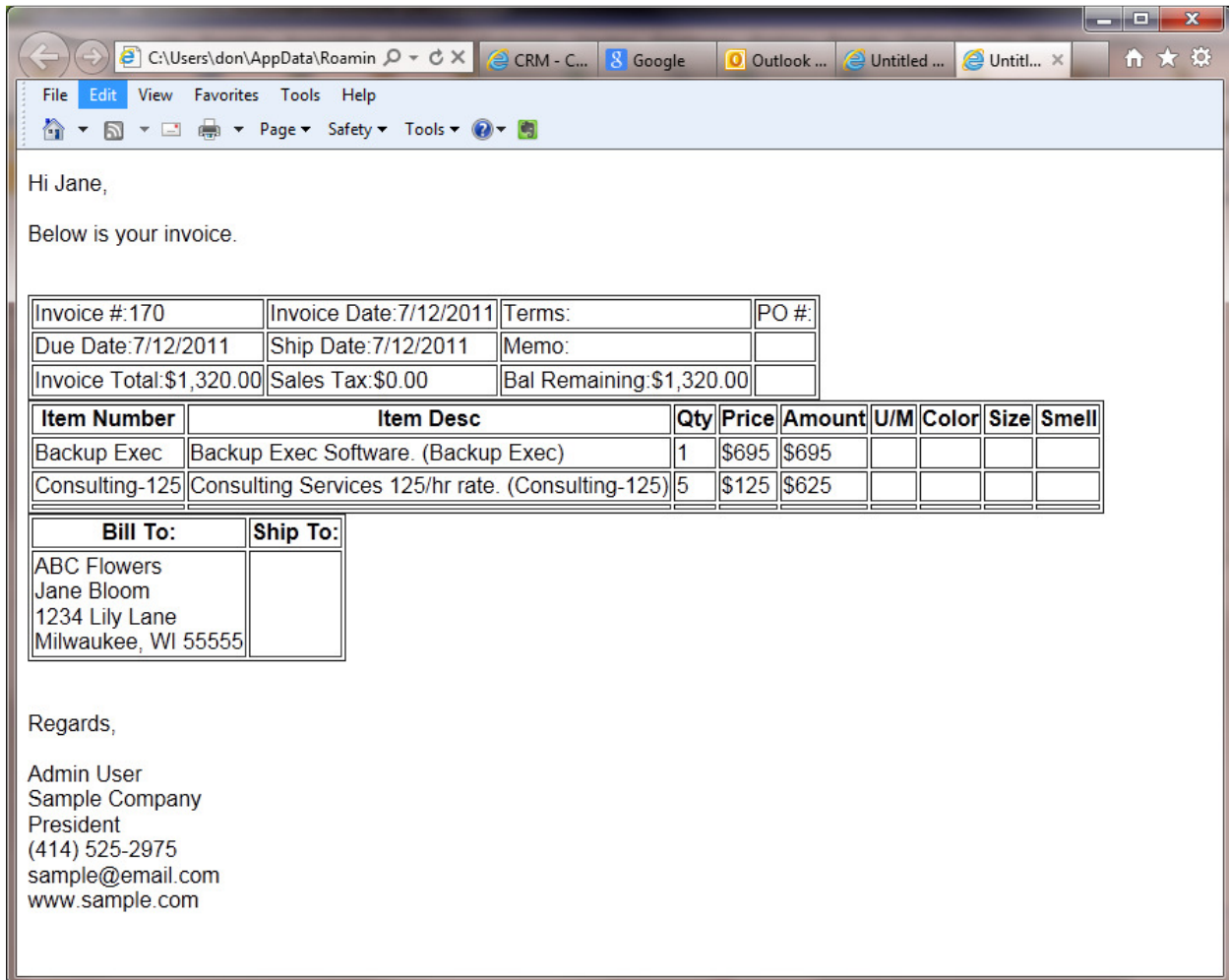
<http://www.qsalesdata.com/releasenotes/QSalesData-Workstation-Update-Instructions.pdf>

- 1. Compatibility with ACT 2013 and QuickBooks 2013 versions.** QSalesData version 4.0 is certified to run on the latest versions of ACT and QuickBooks that will be released in September or 2012. If you plan on upgrading to the 2013 versions of ACT and QuickBooks, we recommend upgrading to QSalesData version 4.0 first. QSalesData versions 2.x and 3.x are will not work with ACT 2013 and QuickBooks 2013.
- 2. Merge to HTML feature for QB Transactions.** We have added the ability to merge a transaction on the QB Transactions tab to an HTML/webpage view. It will work for all transaction types except for Payment. You can then copy the data that appears in the Web page to the email client of your choice and email it to your customer.

The screenshot shows the 'QB Transactions' interface. At the top, there are tabs for 'Activities', 'Opportunities', 'History', 'Notes', 'Documents', 'Groups/Companies', 'Secondary Contacts', 'Relationships', 'Web Info', 'Social Updates', and 'Personal Inf'. Below these are sub-tabs for 'QB Transactions', 'QB Items', and 'Marketing Results'. A 'Show' dropdown is set to 'Credit Memo, Invoices, Est...', and a 'Filter By' dropdown is set to 'All'. There are buttons for 'Goto', 'Convert To Opportunity', and 'Merge to HTML' (which is highlighted with a red box). Below the buttons is a text area that says 'Drag a column header here to group by that column'. The main table has columns: Date, Number, Type, Amount, Sales ..., Due D..., Balan..., Terms, PO, Rep, Status, Ship Via, and C. The table contains several rows of transaction data, with the row for date 7/12/2011 and number 170 highlighted in blue.

Date	Number	Type	Amount	Sales ...	Due D...	Balan...	Terms	PO	Rep	Status	Ship Via	C
6/21/2012	259	Invoice	\$2,600.00	\$0.00	7/21/2012	\$2,600.00	Net 30			Closed		
12/19/2011	218	Invoice	\$3,150.00	\$0.00	12/19/2011	\$3,150.00	Net 30		DG	Closed		
10/29/2011	22	Estimate	\$900.00	\$0.00	10/29/2011	\$0.00				InActive		
10/29/2011	208	Invoice	\$900.00	\$0.00	11/28/2011	\$900.00	Net 30			Closed		
7/12/2011	170	Invoice	\$1,320.00	\$0.00	7/12/2011	\$1,320.00				Closed		
7/12/2011	169	Invoice	\$600.00	\$0.00	7/12/2011	\$600.00				Closed		

When you click on the Merge to HTML button, a webpage window will appear on your screen, like the one below.



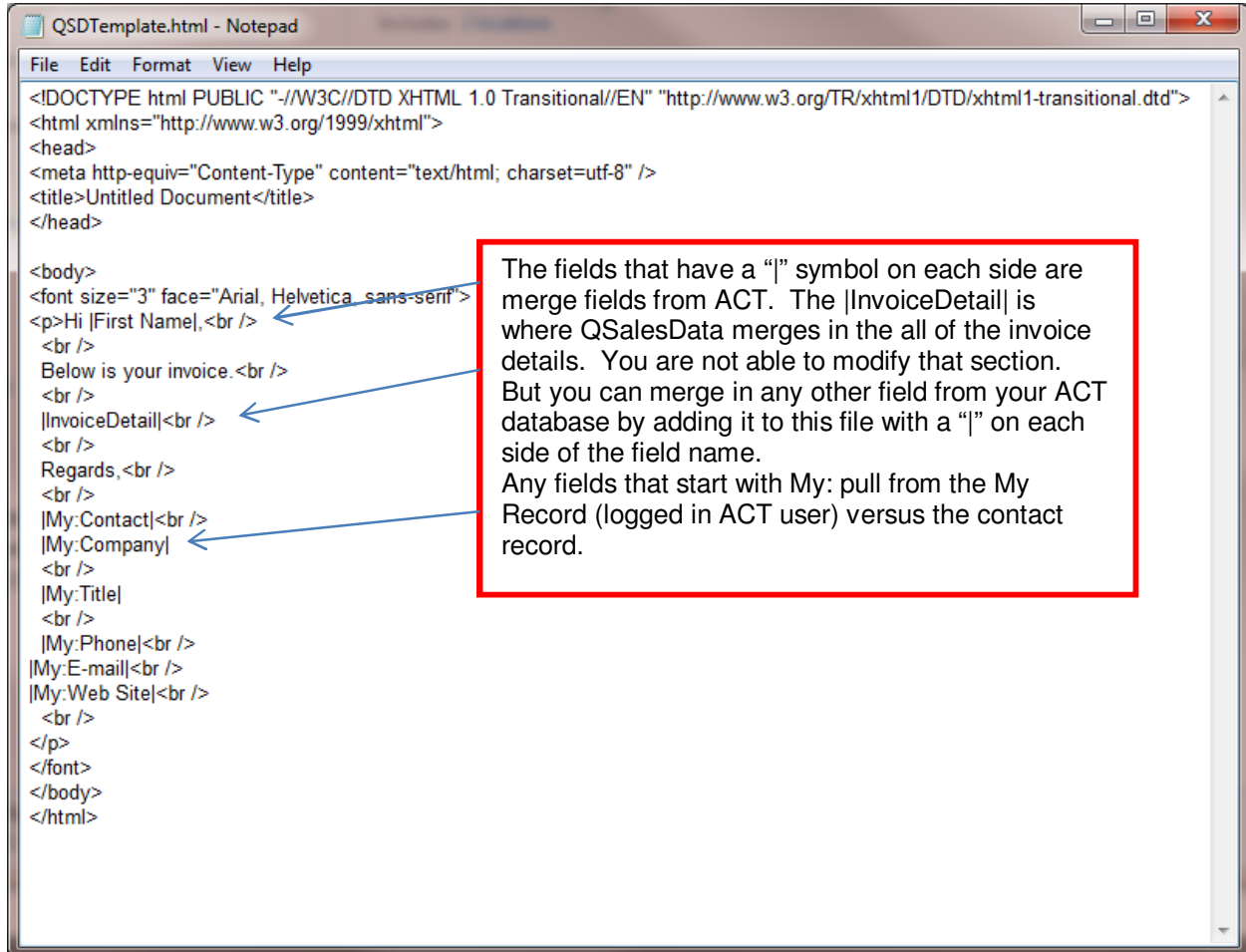
From this window you can Copy the data and Paste it into the body of your email client. This is a great way to be able to email an Invoice or other transaction to your customer.

Selecting and Making Modifications to the Merge to HTML Template

The Merge to HTML data is generated from a template that is installed when you install QSalesData version 4.0. You have the ability to make adjustments to this html template, and create additional templates. The default location of the template is:

C:\Program Files\ACT\Act for Windows\Plugins\QSDTemplate.html
 C:\Program Files(x86)\ACT\Act for Windows\Plugins\QSDTemplate.html (64-bit machines)

If you are familiar with editing web/HTML files, you can bring up the template in an HTML editor and make adjustments to the template. Here is what the template looks like when you bring it up in Notepad in Windows. **We do not recommend using Microsoft Word to edit the template, it will add all kinds of extra codes to the html file, and will probably break the template functionality.**

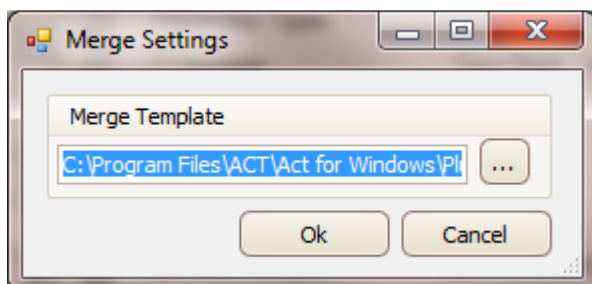


Make the necessary adjustments to the merge template, and save the HTML file, and you are good to go.

You can also specify where your merge template exists, and switch to different templates within the QSalesData preference settings.

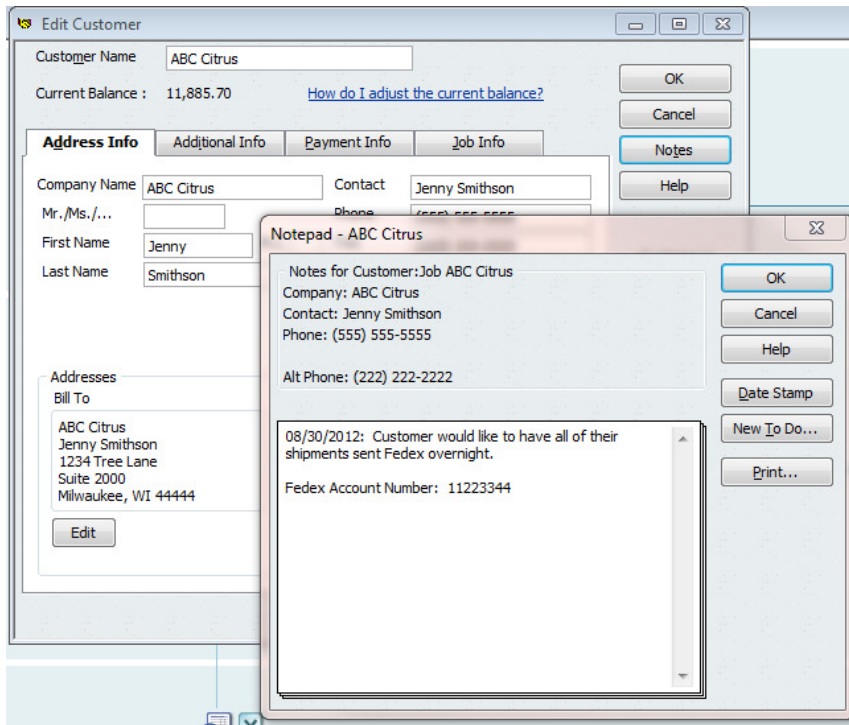
If you would like to select a template in a different location for your Merge to HTML template:

1. From ACT, go to Tools > QSalesData Import
2. Click on the MERGE SETTINGS button
3. You will get a dialog box like the one below that lets you select the location and template file

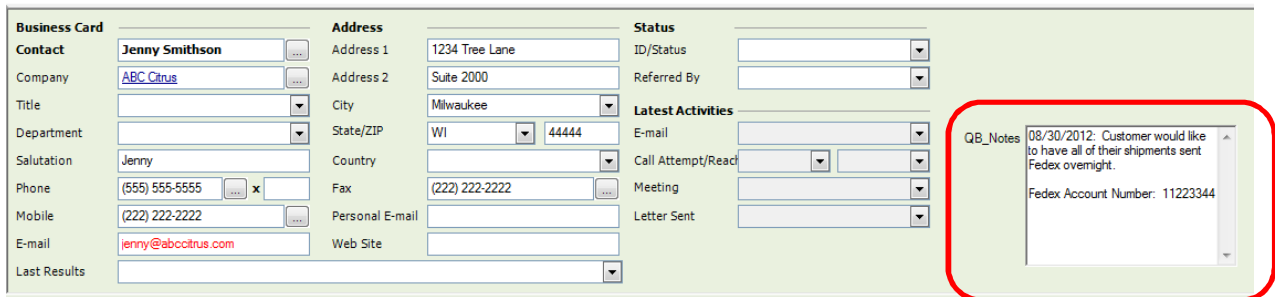


- Import QuickBooks Notes data into ACT during Transaction Sync processes.** After installing QSalesData version 4.0 and running the Build Fields function (Tools > QSalesData Import) a new field will be added to your ACT database named QB_Notes. You can add this field to your ACT layout and any notes that exist on the QuickBooks customer record will sync down to ACT the next time a transaction sync runs, or when you click on the Refresh from QB button. **This is a 1-way sync from QuickBooks to ACT, each time a QSalesData Transaction Sync runs, it will take the QuickBooks Notes data and overwrite the data in the QB_Notes field in ACT.**

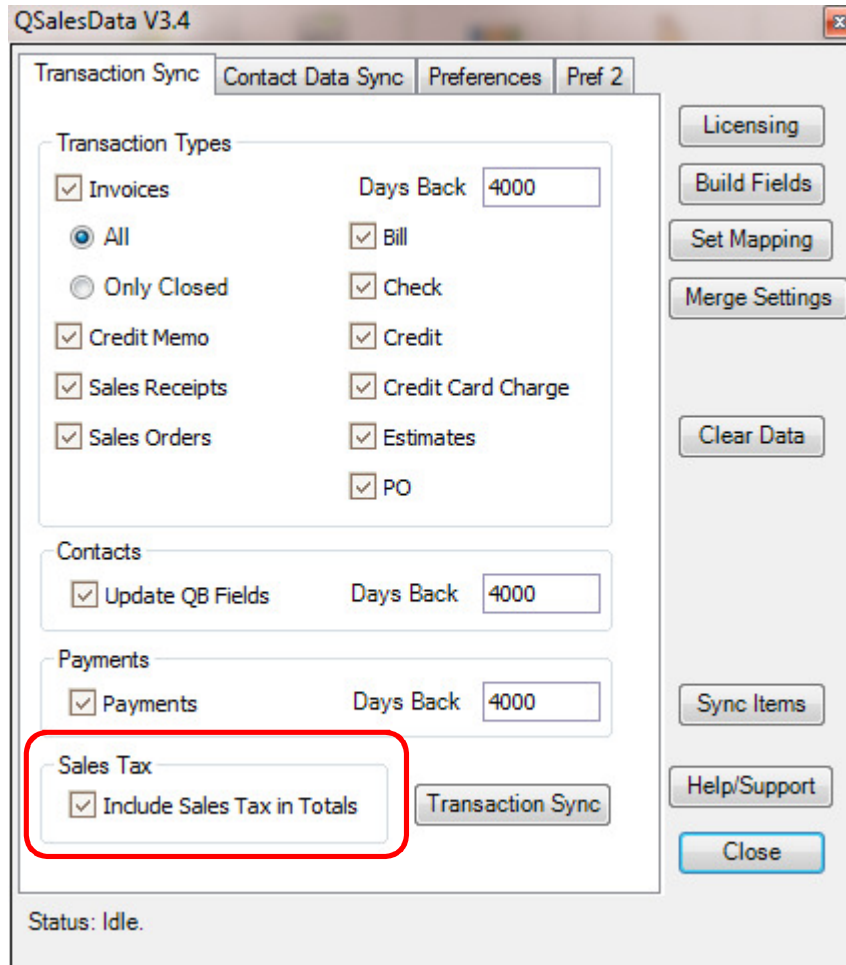
Here is what the notes section looks like in QuickBooks:



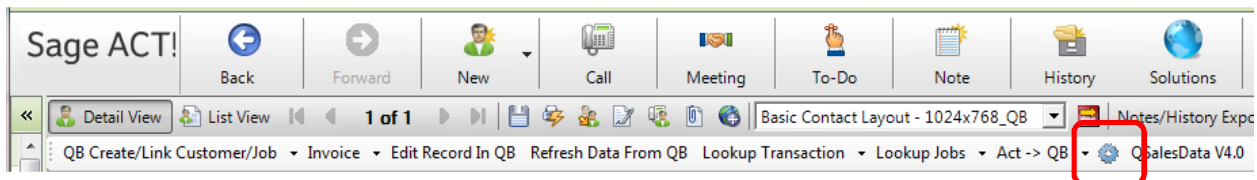
When you add the QB_Notes field to your ACT Layout, this is what the data looks like when it gets pulled into ACT.



4. **Added option to exclude Sales Tax from Sales Totals on the QB Data tab.** Some of our customers wanted to have the option to exclude sales tax from the sales total fields on the QB Data tab. We have added that feature as an option on the Transaction Tab preferences and in the Nightly Sync preferences. To access the preference, from ACT, go to Tools > QSalesData Import and you will see the option on the lower part of the screen.



5. **New locations for QSalesData Toolbar Customizations.** With the release of ACT 2013, we needed to rebuild our QSalesData Toolbar, so some of the customization options of the toolbar have changed slightly. The main change is that you can no longer right-click on the toolbar to customize it.



To customize the buttons on the toolbar, click on the Gear icon circled in red above.

To show or hide the Toolbar, you can go to Tools > QSalesData Toolbar Show/Hide option