

QSalesData Version 4.01 Release Notes

(Released in October 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. Lookup Items functionality has been enhanced.** We have enhanced the Lookup Items feature on our QSalesData toolbar to allow for multiple item lookups and added the ability to search by Item Description in addition Item Number. This will give our QSalesData customers' key functionality to up-sell or cross-sell their existing customer base like never before.

The screenshot shows the 'Lookup Contacts' dialog box with the following fields and options:

Lookup Field	Lookup Value	Date Range	Start Date	End Date	Search Criteria	Logic
Item Num	Dell Server	<input type="checkbox"/>			Purchased	And
Item Desc	Consulting	<input type="checkbox"/>			Not Purchased	
Item Num		<input type="checkbox"/>			Purchased	
Item Num		<input type="checkbox"/>			Purchased	

Callout boxes provide the following explanations:

- Top Left:** You can enter a date range to specify when a purchase was made (pointing to the Date Range checkboxes).
- Top Right:** The AND/OR drop down applies to all of the lines in the lookup. (pointing to the 'And' dropdown).
- Bottom Left:** You can search by either the Item Number or the Item Description. Either way, it does a "contains" search. It will look for the value anywhere in the field. (pointing to the 'Item Desc' field).
- Bottom Right:** You can search for either items that were or were not purchased. This is great for up-selling and cross-selling products. (pointing to the 'Purchased' and 'Not Purchased' dropdowns).

- 2. Added a QB_Contact to the Build Fields and Synchronization processes.** We have some customers that would like to separate the ACT contact from the QuickBooks Billing contact. We have added a new field to our program named QB_Contact. During the Transaction Sync process and when you use the Refresh Data from QB button, the Contact from QuickBooks will be imported into ACT. This allows users to maintain a sell to contact in ACT, and maintain the AP contact in QB without any conflicts. If you would like to utilize this new field, run the Build Fields (Tools > QSalesData Import) program after upgrading and add the new field to your ACT layout screen. The next time a Transaction Sync runs this QB_Contact field will be updated.