

# QSalesData Version 5.1 Release Notes

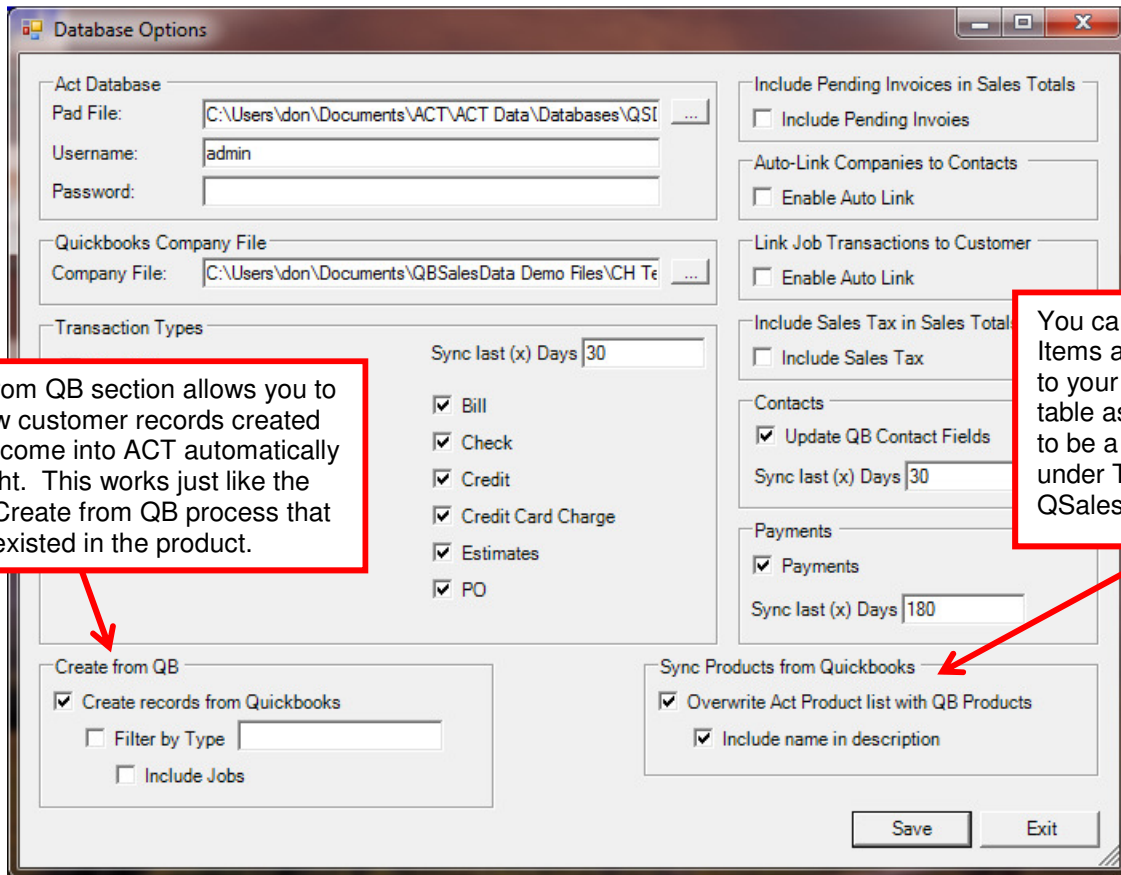
(Released in December 2013)

## Overview of Fixes and Enhancements included in this build:

**Note: If you are upgrading from a 4.x or earlier version of QSalesData you will be prompted to enter your version 5.x serial numbers after installing this version. This version requires version 5.x 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 5.x serial numbers, send us an email at [support@effsolutions.com](mailto: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 Create from QB functionality to the Nightly Sync Program.** This is a great feature for sites that have customers automatically added to QuickBooks, and would like those new customers to come into Act! automatically each night. We have updated the Nightly Synchronization program to allow for this functionality. **You will need to update both the QSalesData client software and the QSalesData nightly sync program on the machine that runs the nightly sync to version 5.1 to get these new features in the Nightly Sync Program.** ([www.qsalesdata.com/install](http://www.qsalesdata.com/install))



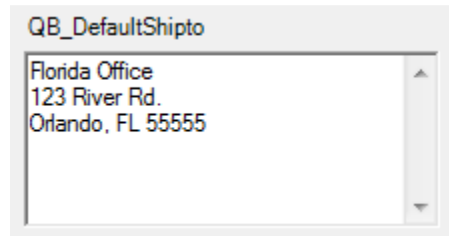
Create from QB section allows you to have new customer records created in QB to come into ACT automatically each night. This works just like the manual Create from QB process that already existed in the product.

You can have your QB Items automatically sync to your ACT Products table as well. This used to be a manual process under Tools > QSalesData Import.

- 2. Added the ability to Sync Items from the Nightly Sync Program.** In previous releases, you could only do this manually from Tools > QSalesData Import and clicking on the Sync Items button. You can now have it run during the nightly sync process. This process clears out your current Products table in Act! and imports your current QuickBooks Items List into the Act! product list so the items can be used with Opportunities in Act!

**3. Added a QB\_DefaultShipto to the Build Fields and Synchronization processes.**

We have some customers that would like to see the QuickBooks Default Ship To address in Act. We have added a new field to our program named QB\_DefaultShipto. During the Transaction Sync process and when you use the Refresh Data from QB button, the Default Ship To address from QuickBooks will be imported into ACT. It is a 1-way sync, from QuickBooks to Act, so you still need to maintain your Ship To information in QuickBooks. 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\_DefaultShipTo field will be updated.



**4. Exclude Custom Fields from the Clear Data function.** Custom fields that are mapped in QSalesData mapping currently get cleared when you run the Clear Data option. Depending on the situation, this may not be ideal. We removed them from the clear data function. The only fields that are cleared are the default fields that QSD builds and appear on the QB Data tab.