



QBSalesData Link for ACT! version 2.0

Get a 360° view of your Customer Information in ACT!

See the following Sales info in ACT!:

- QB Invoice Transactions
- Invoice Details
- Last 3 Years of Monthly Sales Totals
- Last Invoice Date
- Total and Past Due Balances

Key Benefits:

- ACT! Users can quickly see Purchase History and Past Due Balance
- Quickly create Quickbooks Customer records from Contacts in ACT!
- Quickbooks Sales Data synchronizes with ACT! each night and then synchronizes out to any remote salespeople
- Lookup all companies in ACT! that haven't ordered from you in last six months and use ACT! to send a marketing promotion to them.

QBSalesData developed by:

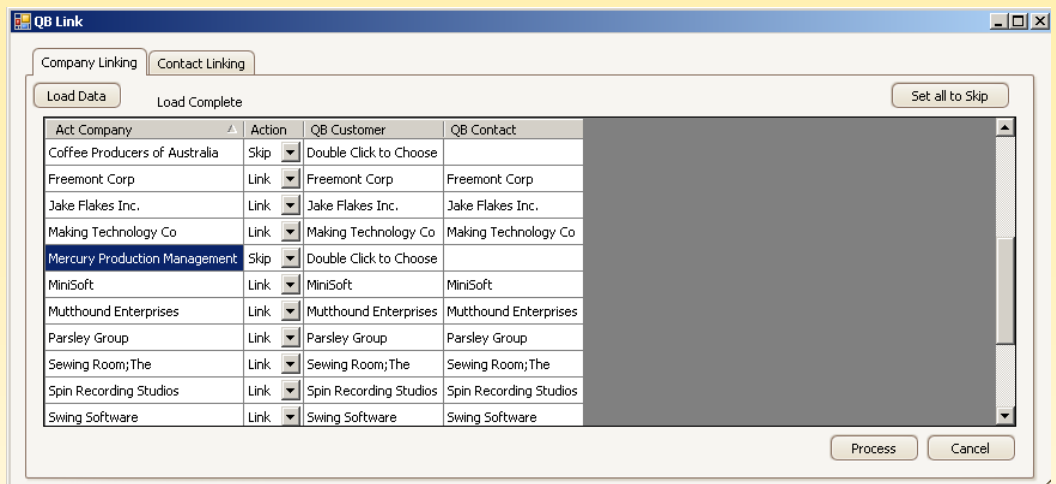
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Businesses are constantly striving to become more efficient. Having separate ACT! and Quickbooks databases can be a major source of inefficiency and duplicate work. That is where **QBSalesData Link for ACT!** fits in:

- Link ACT! Company and Contact Records to Quickbooks Customers
- Quickly create QB Customers from contacts in ACT!
- Quickbooks sales data synchronizes to linked records in ACT!
- View QB Invoice transactions from a tab in ACT!
- View the last 3 Years of Sales Totals from a tab in ACT!
- View Total and Past Due Balance information in ACT!
- Key Sales Data resides in ACT! fields so your ACT! users won't need access to Quickbooks to view Sales Data in ACT!
- All Data Synchronizes out to ACT! Remote Databases

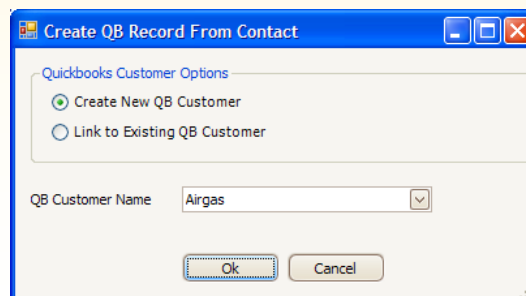
Link Records Between ACT! and Quickbooks

Using the Link Wizard, you can quickly run through your ACT! database and link Companies and Contacts to Quickbooks Customer Records.



Create New Quickbooks Customers from ACT!

When your ACT! Prospect places their first order, simply click on the **Create QB Customer** Button on the ACT! toolbar to use the contact information to create a new Customer Record in Quickbooks and link it to the ACT! Record.





Key Sales Data Synchronizes to ACT!

System Requirements

QBSalesData version 2.0 compatible with:

ACT! Versions

- ACT! 2008 version 10.02 and higher
- ACT! 2009 all versions
- ACT! 2010 all versions

Note: Not designed to work with Web versions of ACT! or QB

Quickbooks Versions

Quickbooks 2007 and higher (Includes Basic, Pro, Premier and Enterprise editions)

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Number	Date	Terms	Type	Amount	Balance Remaining	Due Date
3845	9/29/2009	Net 30	Invoice			
3838	9/22/2009	Net 30	Invoice			
3812	8/25/2009	Net 30	Invoice			
3760	7/21/2009	Net 30	Invoice			
3703	6/9/2009	Net 30	Invoice	\$748.44	\$0.00	7/9/2009
3691	5/26/2009	Net 30	Invoice	\$35.64	\$0.00	6/25/2009
3645	4/14/2009	Net 30	Invoice	\$600.00	\$0.00	5/14/2009
3625	4/7/2009	Net 30	Invoice	\$600.00	\$0.00	5/7/2009

The QB Invoices Tab displays the last 3 years of Invoices

Item Number	Item Desc	Qty	Price	Amount	U/M
L-C-150:SageCRM Consulting	Ticket Title: Upgrade Extended Enterprise Suite (SageCRM) to version 1.2 Summary Notes: After troubleshooting the missing Quote lines in CRM, I was able to determine that the problem was some default SQL code in SageCRM. Made an adjustment to the code in MWN test system and it solved the issue. Made the same SQL code adjustment on MWN's live system, and then can now see all of the line items on the quote within SageCRM Resource Name: Grubor, Don	1			
L-C-150:SageCRM Consulting	Ticket Title: Upgrade Extended Enterprise Suite (SageCRM) to version 1.2 Summary Notes: Upgrade EES and SageCRM to version 1.2. Test and verify operation after upgrade. Take Ken through the process of installing new Outlook Plugin and documented the process for MN. Re-applied the customization of the Company and Person screens after upgrading. Those screens get replaced when upgrades of EES occur.	3	150	450	

Sales Tax: \$0.00
Invoice Total: \$600.00
Balance Remaining: \$0.00

Double-Click on any Invoice to display the Invoice Detail

Sales 2 Years Ago		Sales Last Year		Sales Current Year	
January	0.00	January	187.50	January	116.00
February	0.00	February	0.00	February	0.00
March	0.00	March	566.80	March	566.80
April	0.00	April	0.00	April	0.00
May	0.00	May	225.00	May	225.00
June	0.00	June	569.40	June	569.40
July	0.00	July	0.00	July	0.00
August	13,387.42	August	0.00	August	158.40
September	0.00	September	900.00	September	1,567.20
October	0.00	October	9,355.22	October	0.00
November	0.00	November	2,318.75	November	0.00
December	0.00	December	1,283.40	December	0.00
Sales YTD	13,387.42	Sales YTD	2,448.70	Sales YTD	9,326.88
Sales Total	13,387.42	Sales Total	15,406.07	Last Invoice Date	9/29/2009

The Sales Totals Tab displays 3 years of Sales Totals, YTD Sales Comparisons and Last Invoice Date