



## QBSalesData version 2.0 Product Feature Chart

<b>- Quickbooks Sales Related Fields sync to fields in ACT!</b>	
<i>Last 3 Years of Monthly Sales Totals</i>	
<i>3 Years of YTD and Year End Totals (recalc with each data update)</i>	
<i>Last Invoice Date</i>	
<b>- The Following A/R Related Fields sync to fields in ACT!</b>	
<i>Credit Limit</i>	
<i>Balance 0-30</i>	
<i>Balance 31-60</i>	
<i>Balance 61-90</i>	
<i>Balance 91 +</i>	
<i>Total Past Due Balance</i>	
<i>Total Balance</i>	
<b>- The Following QB Account Fields sync to fields in ACT!</b>	
<i>Account No.</i>	
<i>Terms</i>	
<i>Type</i>	
<i>Rep</i>	
<b>- QB Data fields can exist on both Company and Contact Records</b>	
<b>- Quickbooks Transactions Tab in ACT! includes:</b>	
<i>Invoices</i>	
<i>Estimates</i>	
<i>Credit Memos</i>	
<b>- Double-Click on Invoice Transactions in ACT! to see the line item details</b>	
<b>- All Data exists in ACT! and synchronizes out to remote databases!!!</b>	
<b>- All Data is stored in ACT fields and Tables so you can:</b>	
<i>Add QB Data fields to the Contact List View</i>	
<i>Use QB Data fields to create Dynamic Groups</i>	
<i>Add QB Data fields to Reports</i>	
<i>Add QB Data information to Dashboards</i>	
<i>Map QB Data fields to your smartphone</i>	
<b>- Link ACT! Contacts and Companies to QB Records</b>	<b>(QB)</b>
<b>- A QB Link Wizard to link records all at once</b>	<b>(QB)</b>
<b>- Automatic sync of your QB Transactions into ACT! each night</b>	<b>(QB)</b>
<i>(runs in windows scheduler, can be configured to run on a server without QB open)</i>	
<b>- Create QB Customer from a record in ACT!</b>	<b>(QB)</b>
<b><i>Features that have (QB) designator require the Quickbooks client to be installed and open on the computer</i></b>	

Software Version Requirements: ACT! 2008 version 10.02 or higher. Quickbooks version 2007 or higher (Includes Basic, Pro, Premier and Enterprise). Not designed to work with Web versions of ACT! or Quickbooks.

**QBSalesData is developed by: Effective Solutions**

13160 W. Burleigh Rd. • Brookfield, WI 53005 • 414-525-2975

www.qbsalesdata.com • sales@effsolutions.com



## QBSalesData Product Features Coming Soon

**(These Product Features are scheduled and listed in the order they will be released)**

<b>- Create Invoice from Contact Record in ACT!</b>	<b>(QB)</b>
<b>- Synchronize Customer Address Field Changes between ACT! and Quickbooks</b>	<b>(QB)</b>
<i>Map fields to be updated</i>	
<i>Tag which Company and Contact Records get updated when information changes</i>	
<i>Run Update process for an individual linked record or all linked records</i>	
<b>- Additional Transaction Types to the QB Transactions Tab</b>	
<i>Payments</i>	
<i>Sales Orders</i>	
<b>- Create Invoices from CLOSED/WON Opportunities in ACT!</b>	<b>(QB)</b>
<i>Quickbooks Item Numbers, Descriptions and Pricing will synchronize to ACT! Products table</i>	
<i>ACT users will populate the Products tab of the opportunity with the appropriate line items</i>	
<i>Click a button to create a Quickbooks invoice using the Opportunity Product Tab information</i>	
<b>Features that have (QB) designator require the Quickbooks client to be installed and open on the computer</b>	

**An Annual Maintenance fee of 20% of the total license purchase is required with the purchase of the product. Those customers current on the Annual Maintenance will receive QBSalesData Product updates at no additional cost. Customers are billed on an annual basis.**

*Software Version Requirements: ACT! 2008 version 10.02 or higher. Quickbooks version 2007 or higher (Includes Basic, Pro, Premier and Enterprise). Not designed to work with Web versions of ACT! or Quickbooks.*

**QBSalesData is developed by: Effective Solutions**  
13160 W. Burleigh Rd. • Brookfield, WI 53005 • 414-525-2975  
www.qbsalesdata.com • sales@effsolutions.com