QB$ALESDATA FOR ACT

SEE QUICKBOOKS SALES TRANSACTIONS IN ACT!
Developed by Effective Solutions

QBSalesData Multi-User Installation Checklist

1. **Download and install the QBSalesdata Software on your Server Computer. Should be the one that hosts your ACT database or Quickbooks database**
   a. Note, you will need to be able to open up both the ACT and Quickbooks client sessions on the server
   b. Close out of ACT! and Quickbooks
   c. Go to www.qbsalesdata.com/install to download and install the software on the server
2. **Run the Build Fields program to build your QBSalesData fields in your ACT! database**
   a. Open ACT and go to View > Contacts on the top menu to make sure you are in the Contact Detail view.
   b. Then go to Tools > QBSalesData Import and click on the BUILD FIELDS button
   c. At a minimum, you need to build the Contact and Custom Table fields for your product to work properly
   d. (Optional) If you intend to use Company Records in ACT you can build the Company Fields, but not required.
3. **Add the newly built QBSalesData fields to your ACT! Layout**
   a. If you are not experienced with customizing layouts in ACT!, you can hire us or another ACT! consultant to help you with this step if you are don't want to do this yourself
   b. To do this yourself, go to Tools > Design Layouts > Contacts in ACT
   c. Refer to the QBSalesData Quick Start Guide to see a list of fields and sample screen layouts
   d. At a minimum, you should add the QB_InternalID field to the screen so you can verify when ACT records are linked to Quickbooks. It will display the Quickbooks ID in the field after the record is linked.
4. **Set Your Field Mapping**
   a. In ACT, go to Tools > QBSalesData Import and click on the SET MAPPING button
   b. Click on the RESET TO DEFAULTS button to set to the default mapping
   c. Do not change the mapping for Quickbooks Bill to Address 1 & 2
   d. Verify the mapping for the other fields Quickbooks fields to make sure they are pointing to the appropriate fields in ACT. When done, click on CLOSE.
5. **Run the QB Link Wizard to link records between ACT and Quickbooks**
   a. Make sure both ACT and Quickbooks are open
   b. In ACT, go to Tools > QB Link Wizard
   c. In most cases, you will link records using the Contact Linking tab. Select your field matching criteria, and click on the LOAD DATA button to come up with a list of matching records.
   d. After a few seconds Quickbooks will flash and prompt you with a Certificate message. Choose the YES, ALWAYS option and select a user to login as if an option.
   e. Go back to ACT and verify the matching records, and then click on the PROCESS button to link the designated records. Linked records will display a number in the QB_InternalID field.
   f. You can use the CREATE FROM QB tab to add any records that exist in Quickbooks, but not in ACT.
6. **Run a manual Transaction Sync to import Quickbooks Sales Data into ACT**
   a. Make sure both ACT and Quickbooks are open
   b. Go to Tools > QBSalesData Import in ACT
   c. Select your date filter range and click on the TRANSACTION SYNC button to pull in transactions from Quickbooks.
   d. Your Quickbooks transactions will appear in the QB Transactions Tab in ACT, and all of your Sales Total and Past Due Balance fields will be updated.
7. **Go to each workstation that you purchased a QBSalesData license for, and install the program using the link in Step 1. Once installed the QB Transaction tab will show up in ACT.**

Congratulations! Your initial QBSalesData system setup is complete. Refer to the Quickstart Guide for more details on the following additional QBSalesData features that you may want to use:

- QB Create/Link button to create Quickbooks customers from ACT Records
- Create Invoices, Estimates, Sales Orders, and Sales Receipts from Records in ACT
- Sync Customer Data fields between ACT and Quickbooks
- Setup Automated Nightly Transaction Sync process