QSALESDATA FOR ACT

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Developed by Effective Solutions

QSalesData Licensing Decision Worksheet

This worksheet is meant to assist you with deciding how many additional QSalesData licenses you need to purchase for your company. Note that you need to have at least one QSalesData license installed on a machine that has both Quickbooks and ACT installed to have this functionality. Also note that if you want to run the automatic nightly transaction sync program on your server, you will need to purchase a QSalesData license for the server as well.

Refer to the worksheet below to see the different features available depending on if you have QSalesData and Quickbooks installed on your computer. QSalesData is licensed per workstation.

QSD = QSalesData license *QB = Quickbooks License*	ACT User Without QSD Without QB **(General User)**	ACT User **With QSD** Without QB **(Sales User)**	ACT User **With QSD** **With QB** **(Power User)**
View Sales Total Fields in ACT	√	√	√
View Past Due Balance Fields in ACT	√	√	√
View Last Invoice Date Field in ACT	√	√	√
View Peripheral QB Fields in ACT (Terms, Type, Rep, Credit Limit, etc.)	√	√	√
Access to the QB Transactions Tab in ACT (view invoices, estimates, sales orders, payments, etc)		√	√
Double-click on transactions in the QB Transactions Tab to see line item details		√	√
Access to the QB Items Tab and the Lookup Items button in ACT		√	√
Create ACT Opportunity that can be converted to a Quickbooks Transaction		√	√
Create QB Customers and Vendors from ACT			√
Create QB Transactions from ACT (invoices, estimates, sales orders, sales receipts, etc.)			√
Convert Opportunities to QB Transactions			√
"Edit Record in QB" and "Refresh Data from QB" functions on the QSalesData toolbar			√
Link Records between ACT and Quickbooks			√
Manually import QB Transactions into ACT			√
Run the Contact Data sync process to push address changes between ACT and Quickbooks			√
Use the GOTO button on the QB Transactions Tab to jump to a transaction in Quickbooks			√