QSalesData - Quickbooks Link for ACT!

Changing the Way Small Businesses Do Business!

NORTHBROOK Consulting Group, Inc.

1125 Hohlfelder Road
Glencoe, IL 60022

847.835.0979
www.northbrookconsulting.com
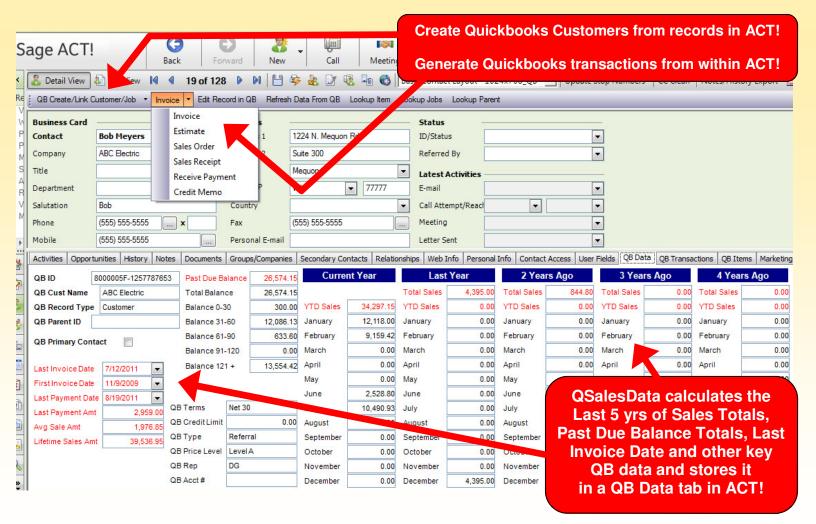e-mail: mail@northbrookconsulting.com

Take your Business to the Next Level of Efficiency. Link your ACT! and Quickbooks applications together to eliminate double-entry and make your ACT! Users more productive. DO MORE WITH LESS.

- Link Records between ACT! and Quickbooks
- Synchronize Contact field updates between ACT! and Quickbooks
- Create QB Customers from Records in ACT!
- Create Quickbooks Invoices, Estimates, Sales Orders and Sales Receipts from ACT!
- Convert ACT! Opportunities to QB Transactions
- QB Item List syncs to ACT! Product List
- View Quickbooks Sales Transactions in ACT!
- View the last 5 Years of Sales Totals in ACT!
- View Past Due Balance information and Last Invoice Date in ACT!
- Data resides in ACT! fields so your ACT! users won't need access to QB to view Sales Data in ACT!
- All Data Synchronizes out to ACT! Remote Databases

Visit www.qsalesdata.com to view our 8 min Product Video

Create Quickbooks Customers from records in ACT!

Generate Quickbooks transactions from within ACT!

QSalesData calculates the Last 5 yrs of Sales Totals, Past Due Balance Totals, Last Invoice Date and other key QB data and stores it in a QB Data tab in ACT!

Screenshot — QB Data

Business Card

Contact	Bob Meyers
Company	ABC Electric
Title	
Department	
Salutation	Bob
Phone	(555) 555-5555
Mobile	(555) 555-5555

	1224 N. Mequon Rd	
	Suite 300	
	Mequon	
		77777
Country		
Fax	(555) 555-5555	
Personal E-mail		

Status

| ID/Status | |
| Referred By | |

Latest Activities

E-mail	
Call Attempt/Reach	
Meeting	
Letter Sent	

Tabs: Activities | Opportunities | History | Notes | Documents | Groups/Companies | Secondary Contacts | Relationships | Web Info | Personal Info | Contact Access | User Fields | QB Data | QB Transactions | QB Items | Marketing

Field	Value
QB ID	8000005F-1257787653
QB Cust Name	ABC Electric
QB Record Type	Customer
QB Parent ID	
QB Primary Contact	☐
Last Invoice Date	7/12/2011
First Invoice Date	11/9/2009
Last Payment Date	8/19/2011
Last Payment Amt	2,959.00
Avg Sale Amt	1,976.85
Lifetime Sales Amt	39,536.95

Field	Value
Past Due Balance	26,574.15
Total Balance	26,574.15
Balance 0-30	300.00
Balance 31-60	12,086.13
Balance 61-90	633.60
Balance 91-120	0.00
Balance 121 +	13,554.42
QB Terms	Net 30
QB Credit Limit	0.00
QB Type	Referral
QB Price Level	Level A
QB Rep	DG
QB Acct #	

	Current Year	Last Year	2 Years Ago	3 Years Ago	4 Years Ago
Total Sales		4,395.00	844.80	0.00	0.00
YTD Sales	34,297.15	0.00	0.00	0.00	0.00
January	12,118.00	0.00	0.00	0.00	0.00
February	9,159.42	0.00	0.00	0.00	0.00
March	0.00	0.00	0.00	0.00	0.00
April	0.00	0.00	0.00	0.00	0.00
May	0.00	0.00	0.00		
June	2,528.80	0.00	0.00		
July	10,490.93	0.00	0.00		
August		0.00	0.00		
September		0.00	0.00		
October		0.00			
November		0.00	0.00		
December		4,395.00	0.00		

Dropdown menu (Invoice): Invoice | Estimate | Sales Order | Sales Receipt | Receive Payment | Credit Memo

Toolbar: QB Create/Link Customer/Job | Invoice | Edit Record in QB | Refresh Data From QB | Lookup Item | Lookup Jobs | Lookup Parent

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Key Benefits

We are the **ONLY** Quickbooks Link product that brings data into fields in ACT! Having the data in ACT! fields let's you take full advantage of the information:

Use QB data to perform key lookups and create Dynamic Groups in ACT!
- Customers with Past Due Balances
-
-

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Because the QB data is updated in a nightly synchronization process, **access to the data is fast.** We don't have to talk to QB every time we want to see the QB data.

All of the QB Data we bring into ACT! synchronizes out to any ACT! remote databases you may have.

We are the **ONLY** QB Link product that includes a QB Items tab.

System Requirements

ACT! Versions
ACT! 2010 Standard and Corporate
ACT! 2011 Pro and Premium
ACT! 2012 Pro and Premium

Quickbooks US Versions
QB 2007 Basic,Pro,Premier,Enterprise
QB 2008 Basic,Pro,Premier,Enterprise
QB 2009 Basic,Pro,Premier,Enterprise
QB 2010 Basic,Pro,Premier,Enterprise
QB 2011 Basic,Pro,Premier,Enterprise
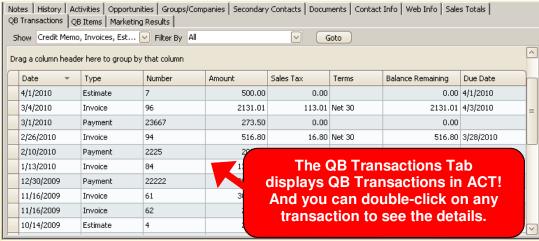QB 2012 Basic,Pro,Premier,Enterprise

Quickbooks CANADA and UK Versions
QB 2010-2012 Basic,Pro,Premier,Enterprise

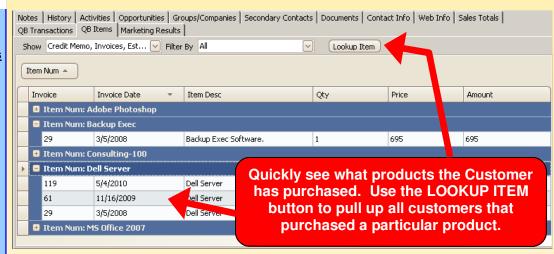*Works with 32-bit and 64-bit versions of Windows XP, Windows Vista and Win 7*

Requires US, UK or Canada Versions of ACT! and Quickbooks

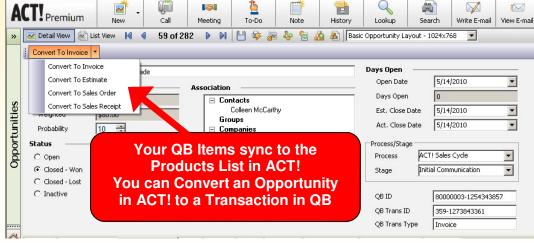*Note: Not designed to work with Web Versions of ACT! and/or QB*

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View QB Transactions in ACT!

The QB Transactions Tab displays QB Transactions in ACT! And you can double-click on any transaction to see the details.

QB Items tab displays Products Purchased

Quickly see what products the Customer has purchased. Use the LOOKUP ITEM button to pull up all customers that purchased a particular product.

Convert ACT! Opportunities to QB Transactions

Your QB Items sync to the Products List in ACT! You can Convert an Opportunity in ACT! to a Transaction in QB

Note: In order to convert Opportunities to QB Transactions you must be running ACT! 2010 or higher (Standard or Corporate)

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Quickbooks is a registered trademark of Intuit Software