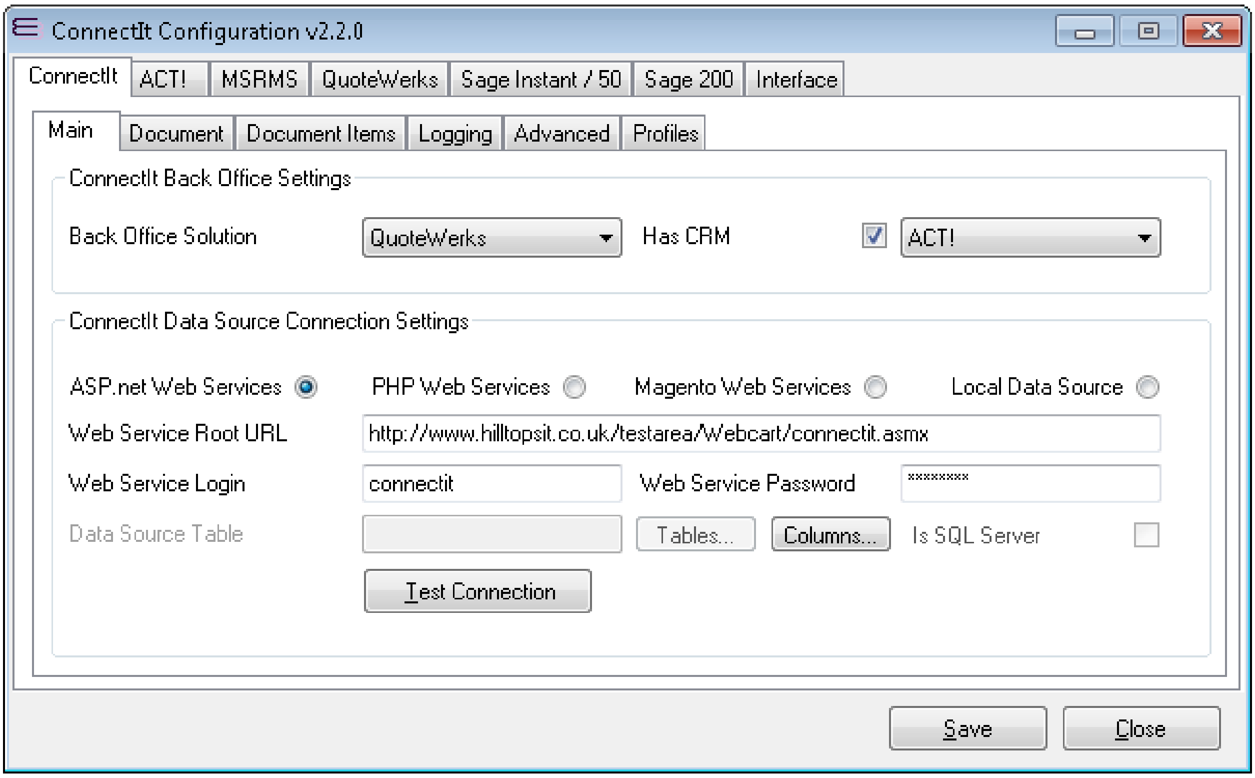
Step-by-Step Guide to Configuration

The **ConnectIt Professional Configuration** utility provides a way to check or change the various settings the **ConnectIt Professional** software uses. To open the **ConnectIt Professional Configuration** application, browse to the **Start | All Programs | ConnectIt Professional** menu and click the **ConnectIt Professional Configuration** option.

ConnectIt | Main tab

The **ConnectIt | Main** tab allows you to select the back office solution type and set the connection to the online internet or local **Enquiry / Order Data Source**.



1. Select the **Back Office Solution** that you will be using with **ConnectIt Professional**: Microsoft RMS, QuoteWerks, Sage Instant, Sage 50 or Sage 200.

Note: other tabs will enable or disable based on the selection made here.

2. Select whether it is one of the **Web Service** options or a **Local Data Source** connection type.

3. If a **Web Service Data Source** has been selected, then the **Web Service Root URL, Login** and **Password** options will be available:

- **i.** Enter the **Web Service Root URL**:
  - **a.** For **ASP.net Web Services**, this is the name of the ASP ASMX web page.
  - **b.** For **PHP** and **Magento Web Services**, this is the folder where the PHP files are loaded.
- **ii.** Enter the **Web Service Login** and **Password** for the website web services connection.

4. If a **Local Data Source** has been selected, then the **Data Source Connection String, Table** and **Is SQL Server** options will be available:

- **i.** Enter the **Connection String** for the **Local Data Source**; example connection strings can be found below.
- **ii.** Enter the name of the **Table** (or SQL View) where the **Enquiry / Order** information is stored; if you are not sure what Tables exist, then click the **Tables button** for a list.
- **iii.** If the **Local Data Source** is a **SQL Server Table** or **View**, then tick the **Is SQL Server** option.

5. Click the **Test Connection** button to check that the settings are correct.

Note: On successful configuration, you will receive the message "Logon Information Tested OK!" If you do not receive this message, please check the details and try again.

6. Click the **Save** button to retain the settings on the **ConnectIt | Main** tab.

Example ConnectIt connection string for various common data sources:

Comma-separated text file

```
Provider=Microsoft.Jet.OLEDB.4.0;Data Source=C:\Program Files\Hilltops
IT\ConnectIt\Data Sources\;Extended Properties="text;HDR=Yes;FMT=Delimited";
```

Excel spreadsheet

```
Provider=Microsoft.Jet.OLEDB.4.0;Data Source=C:\Program Files\Hilltops
IT\ConnectIt\Data Sources\Excel Example.xls;Extended Properties="Excel
8.0;HDR=Yes;IMEX=1";
```

Access database

```
Provider=Microsoft.Jet.OLEDB.4.0;Data Source=C:\Program Files\Hilltops
IT\ConnectIt\Data Sources\Access Example.mdb;User Id=admin;Password=;
```

SQL Server database with standard security

```
Provider=SQLOLEDB;Data Source=myServer\myInstance;Initial Catalog=myDatabase;User
Id=myUsername;Password=myPassword;
```

SQL Server database with trusted connection

```
Provider=SQLOLEDB;Data Source=myServer\myInstance;Initial
Catalog=myDatabase;Integrated Security=SSPI;
```

ConnectIt | Document tab

The **ConnectIt | Document** tab allows you to set up how top line Document Header information is transferred from the **Data Source** and created in the back office solution.

The values in the screenshots below and those configured as part of the default **ConnectIt Professional** installation illustrate a typical installation, but there is considerable scope for modifying these settings using the following conventions:

- "**NEW**" in a field denotes that a new record should be created in the back office solution for the attribute. Note that this option is available in some fields only. *
- "**LINK**" or "**LINK_DEL**" in a field denotes that the information for the Document should be retrieved from the integrated back office solution. Note that these options are available in some fields only. *
- "**&Web_**" prefix to a field value denotes that a value from the web service should be used. For example: in the screenshot below, the value &Web_DocName tells **ConnectIt Professional** to use the "DocName" field from the web service for the Document Name.
- "**&Fil_**" prefix to a field value denotes that a value from the local data source should be used. The "Web" prefix lends itself to use when configuring Web Service Data Sources, the "Fil" prefix lends itself to Local (File) Data Sources, but essentially these two are interchangeable in their usage (examples below).
- "**&Calc_**" prefix to a field value denotes that ConnectIt should evaluate the expression as a mathematical equation (examples below). Note that &Web_ prefix values may be used within the &Calc_ string, but these should be suffixed with a semicolon ";" character.
- "**&Conc_**" prefix to a field value denotes that ConnectIt should concatenate the expression into a piece of text (examples below). Note that &Web_ prefix values may be used within the &Calc_ string, but these should be suffixed with a semicolon ";" character.
- "**&Date_**" prefix to a field value denotes that ConnectIt should evaluate the value entered into a date (examples below). *

Entering any other value fixes the value of that field – records created in the back office solution will always be given that fixed value.

* For a full list of all options, please see the Appendix at the end of this Step-by-Step document.

Examples of ConnectIt Configuration values:

`Document Items | Cost Price = &Calc_&Web_BasePrice; + &Web_OptionsPrice;`
Is evaluated as the 'BasePrice' field value from the web service plus the 'OptionsPrice' field value from the web service.

`Document Items | Selling Price = &Calc_&Web_Cost; * 1.25`
Is evaluated as the 'Cost' field value from the web service multipled by 1.25.

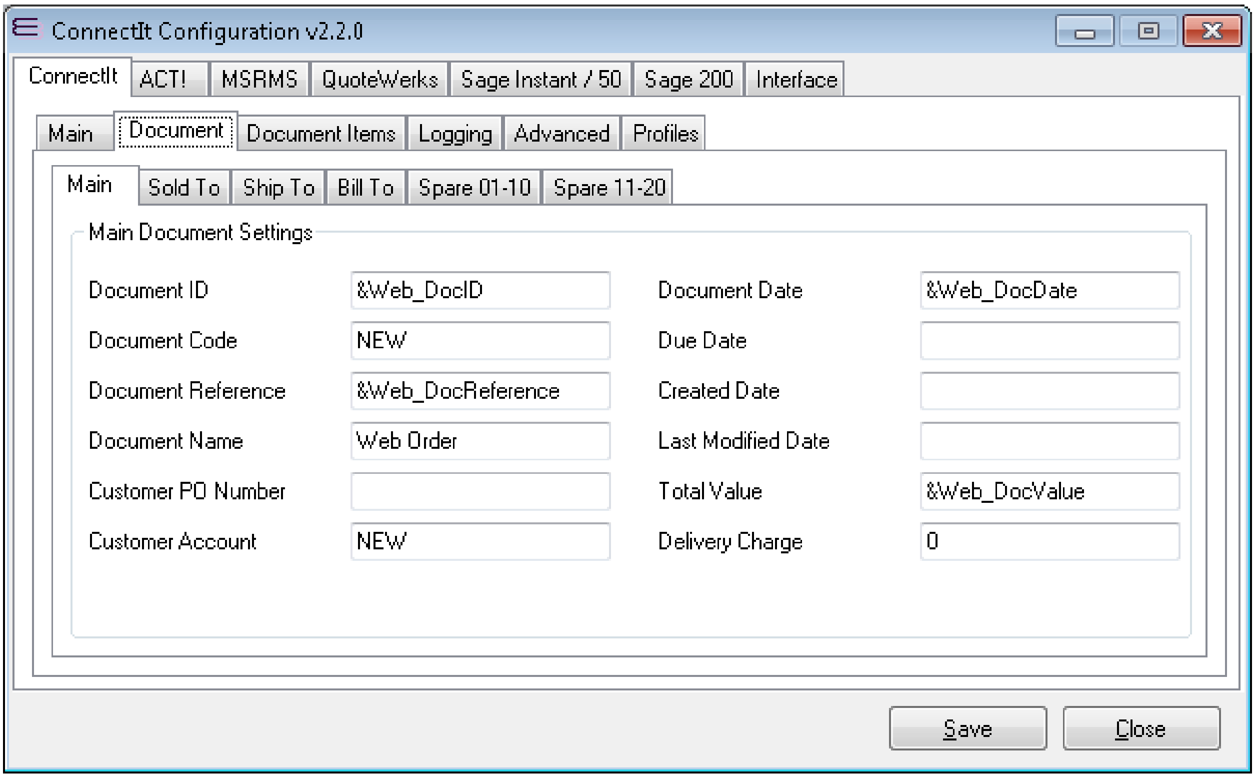
`Document Items | Cost Price = &Calc_&Web_BasePrice; + &Web_OptionsPrice;`
Is evaluated as the 'BasePrice' field value from the local data source plus the 'OptionsPrice' field value from the local data source.

`Document Items | Selling Price = &Calc_&Web_Cost; * 1.25`
Is evaluated as the 'Cost' field value from the web service multipled by 1.25.

`Document Name = "A string I want to concatenate with &Fil_My Field; from the file"`
Is evaluated as the fixed string "A string I want to concatenate with" prefix and "from the file" suffix to the "My Field" field value from the local data source.

`Document Date = &Date_Today`
Is evaluated as today's date.

`Document Due Date = &Date_LastDayOfNextMonth`
Is evaluated as the last day (i.e. 30th or 31st) of the month after the current month.

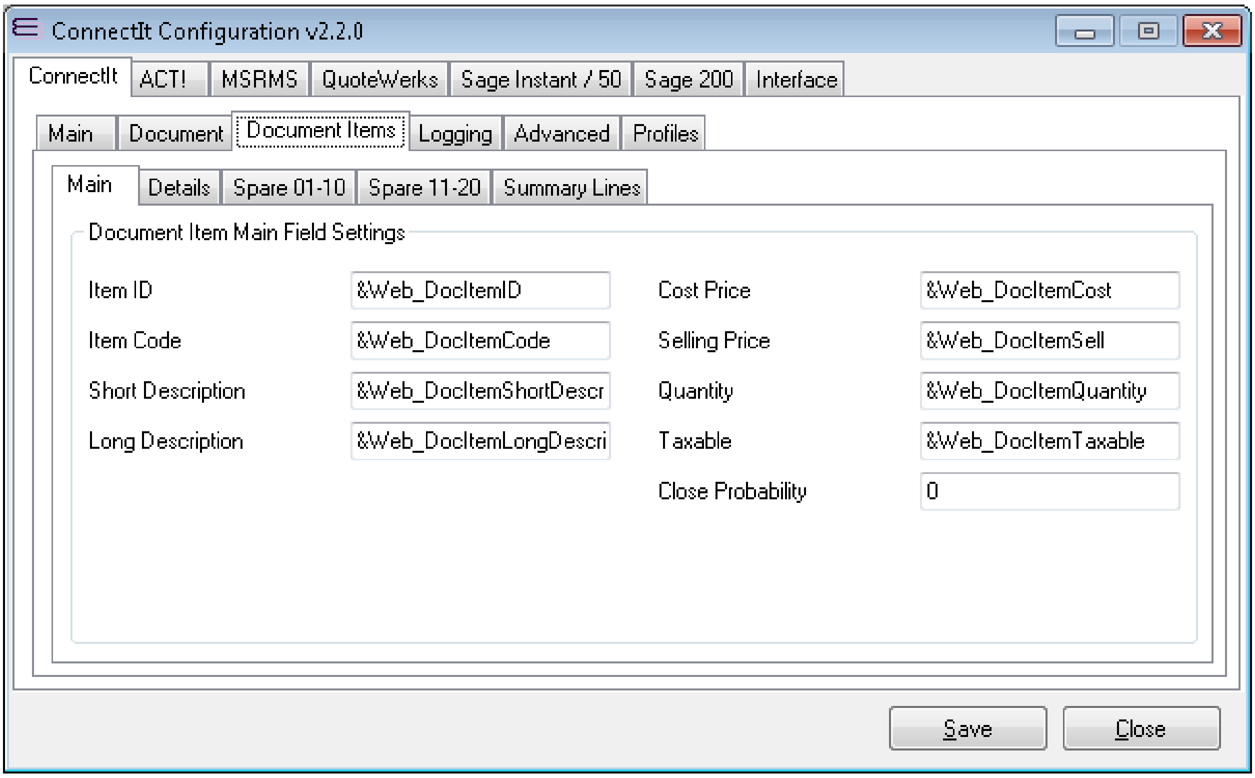


1. Enter the appropriate value for the **Main Document Settings**.
2. Click the **Save** button to retain the settings on the **ConnectIt | Document** tab.

ConnectIt | Document Items tab

The **ConnectIt | Document Items** tab allows you to set up how product detail Document Item information is transferred from the **Data Source** and created in the back office solution.

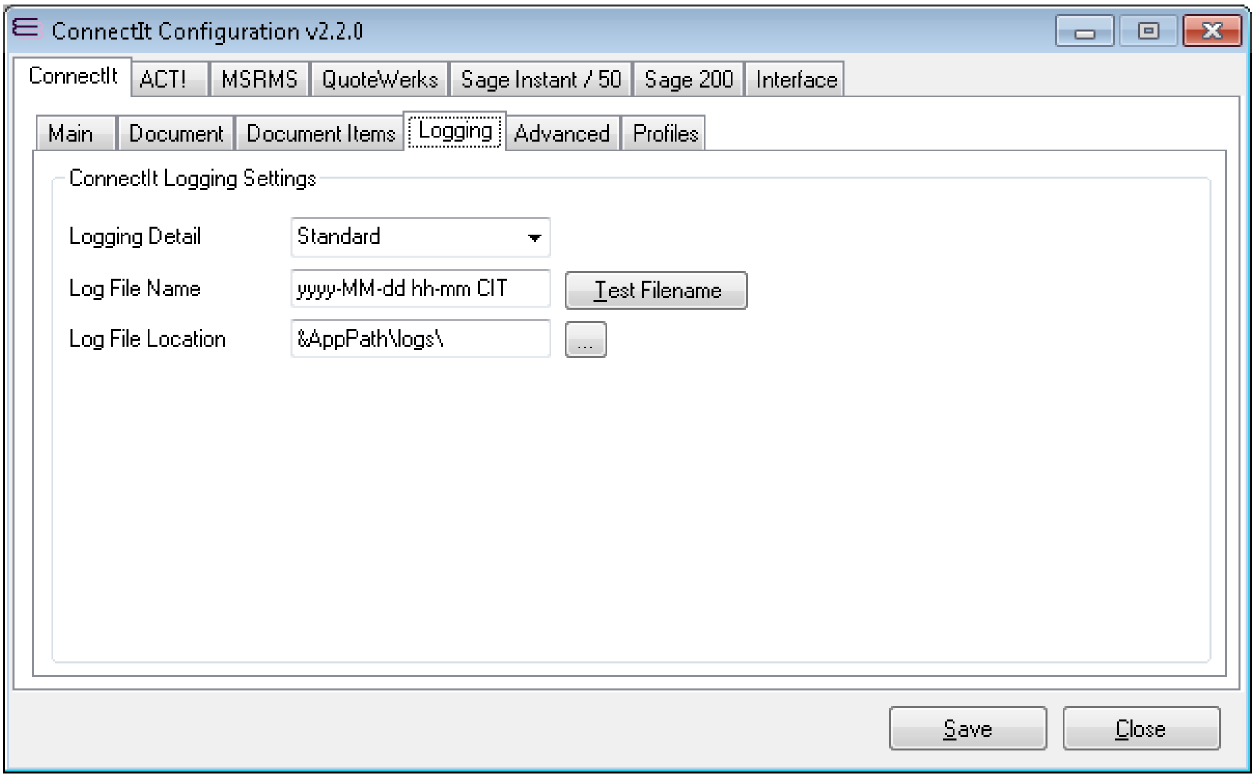
Note: the values in the screenshot below and those configured as part of the default **ConnectIt Professional** installation illustrate a typical installation, but there is considerable scope for modifying these settings using the conventions described in the **ConnectIt | Document tab** section above.



1. Enter the appropriate value for the **Main Document Items Settings**.
2. Click the **Save** button to retain the settings on the **ConnectIt | Document Items** tab.

ConnectIt | Logging tab

The **ConnectIt | Logging** tab allows you to set up the **ConnectIt Professional** application activity log files are saved to.



1. Set the **Logging Detail** to the required level: Errors Only, Standard or Debug
2. Set the **Log File Name** to the required naming convention and click the **Test Filename** button to get an example filename that the **ConnectIt Professional** application will use.

Note: the Log File Name is parsed to be formatted with the current date and time that the ConnectIt Professional application is run. This can be useful to organise log files to ensure that a complete set is kept for reference purposes.

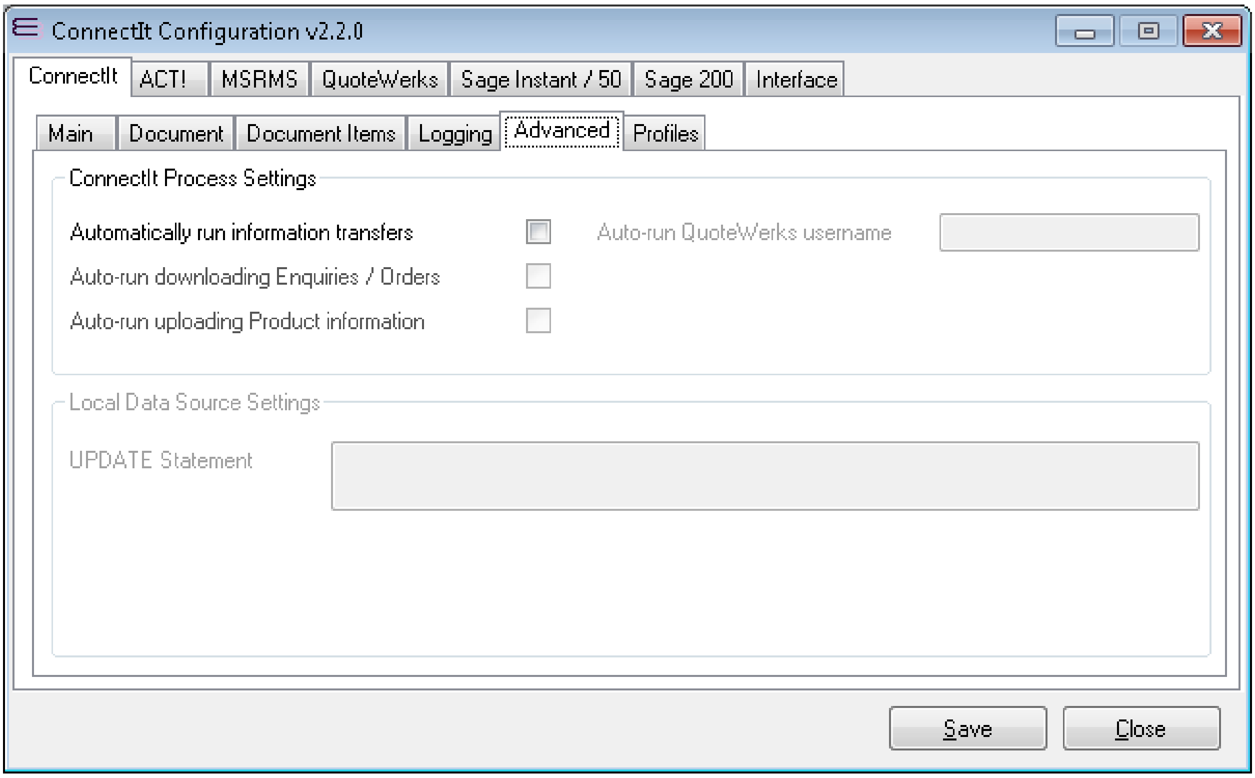
3. Set the **Log File Location** to the directory where you would like the **ConnectIt Professional** log files to be saved.

Note: the &AppPath macro may be used to denote the ConnectIt Professional application directory.

4. Click the **Save** button to retain the settings on the **ConnectIt | Logging** tab.

ConnectIt | Logging tab

The **ConnectIt | Advanced** tab allows you to set up **ConnectIt Professional** to run automatically and set the **SQL UPDATE Statement** (if using a **Local Data Source** type)..



1. If you would like **ConnectIt Professional** to run automatically to create Enquiries / Orders and/or upload Products, then tick the **Automatically run information transfers** tick box. This will then enable the **Auto-run creating Enquiries / Orders** and **Auto-run uploading Product information** tick boxes. These can then be ticked as appropriate for your requirements.

Note: both the Automatically run information transfers AND Auto-run creating Enquiries / Orders tick boxes need to be ticked for Enquiries / Orders to be created automatically.

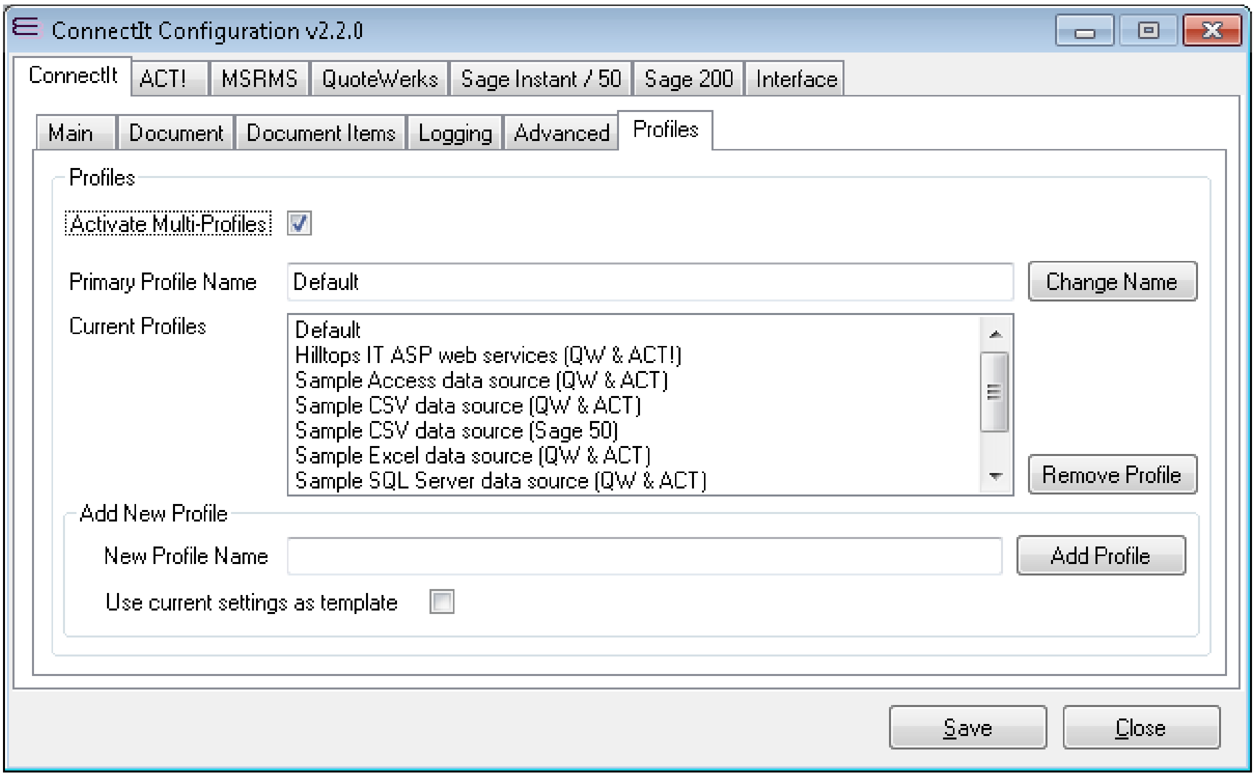
Note: both the Automatically run information transfers AND Auto-run uploading Product information tick boxes need to be ticked for products to be created automatically.

Note: When creating Enquiries / Orders automatically to Sage 200, you must ensure that the Customer Account found on the ConnectIt | Document | Main tab is set and the Customer Account References created exist in Sage. For new customer's a Customer Account Reference of "NEW" should be used.

2. Click the **Save** button to retain the settings on the **ConnectIt | Advanced** tab.

ConnectIt | Profiles tab

The **ConnectIt | Profiles** tab allows you to activate and control various different configuration **Profiles**. **Profiles** are different **ConnectIt Professional** configurations allowing you to create **Enquiries / Orders** from multiple sites using one **ConnectIt Professional.**



1. To activate Site Profiles check the **Activate Multi-Profiles** option; this will enable the other options available on this tab.
2. By default the main **Profile** is named “Default”, this can be changed to a more meaningful name by entering the new name into **Primary Profile Name** and then clicking **Change Name**. You cannot delete the main profile only rename it.
3. If you would like to add another **Profile**, enter the name you would like to use into the **Profile Name** textbox. You then have the option to **Use current settings as template**, if you would like to use your current settings as a start point check **Use current settings as template**. This will result in a new **Profile** being created that is a copy of your current settings. If you do not check **Use current settings as template** then the **ConnectIt Professional** defaults will be applied to the new **Profile**.
4. To view/edit the site profiles you have created you need to restart the **ConnectIt Professional Configuration Utility**. As the **ConnectIt Professional Configuration Utility** starts you will see a pop-up (pictured below) allowing you to select which Profile you would like to edit.
5. To delete a site profile select the profile you would like to delete from the **Current Profiles** box and click **Remove Profile**.

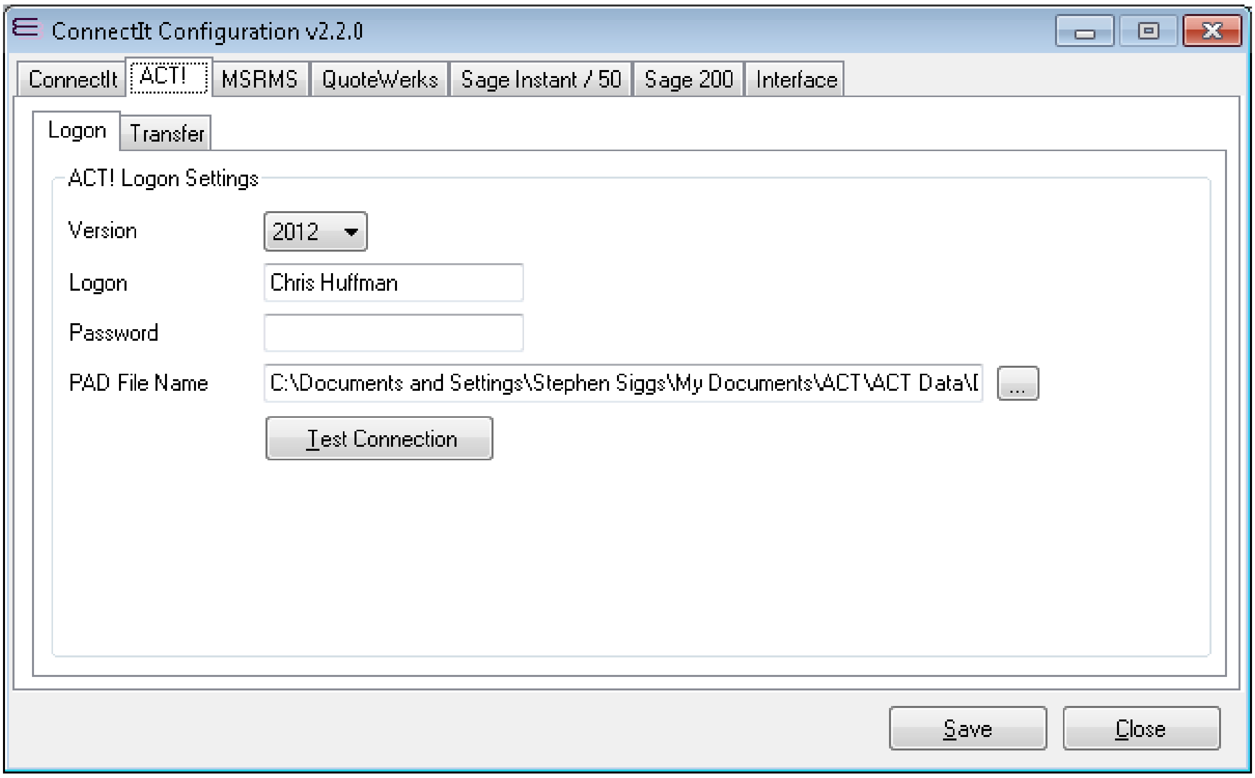
Note: You cannot delete the Primary Profile; the Primary Profile is the first Profile in the Current Profiles list.

6. Click the **Save** button to retain the settings on the **ConnectIt | Profiles** tab.

Note: To view/edit the Configuration for the multiple Profiles you have created, you need to restart the ConnectIt Professional Configuration Utility. As the ConnectIt Professional Configuration Utility opens the following pop-up will be displayed which allows you to select which Profile you would like to edit. You will then be editing the chosen profile until you close the ConnectIt Professional Configuration Utility.

ACT! | Logon tab

The **Sage ACT! | Logon** tab enables the connection to the ACT! database files where the **Data Source** information will be created to be set up and tested.



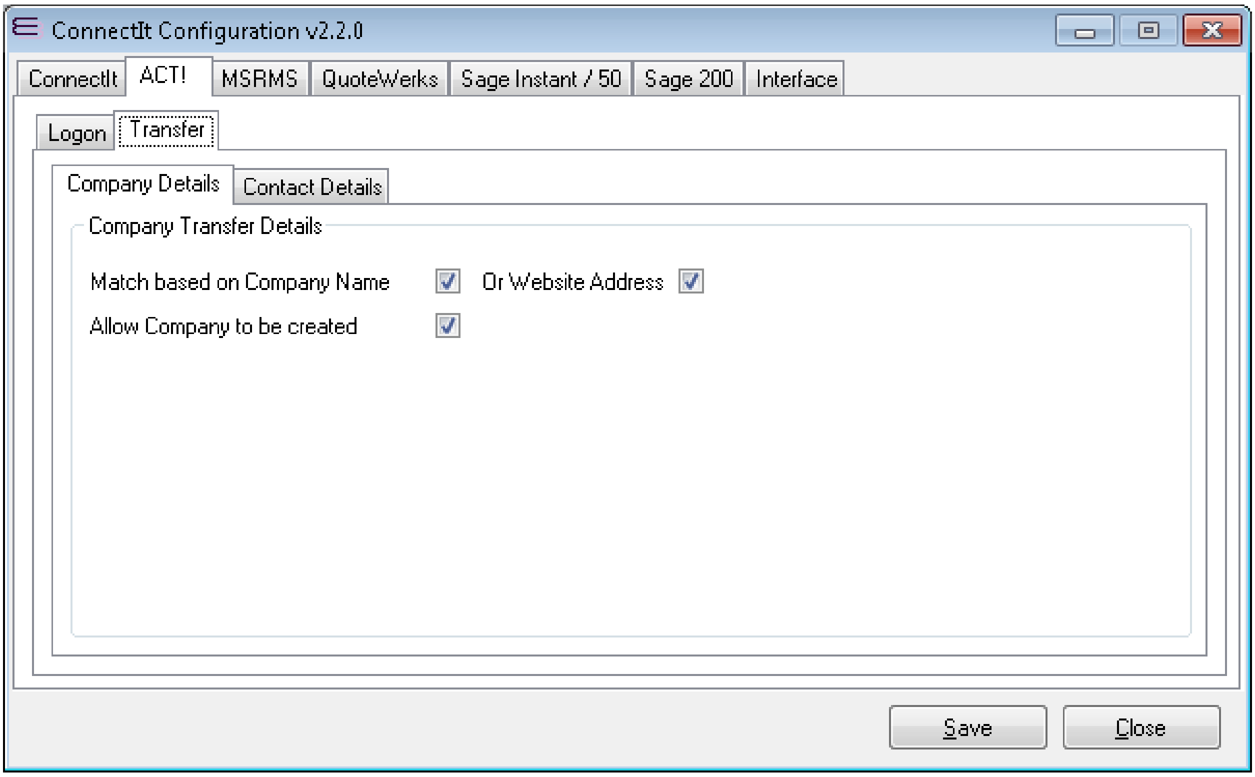
1. On the **ACT!** tab, select the **Version** of **Sage ACT!** that you are running and then enter your **Logon**, and **Password**, as appropriate for your **Sage ACT!** installation.
2. Type, or select the **Sage ACT! PAD File** database name where the Company and/or Contact information should be created.
3. Click the **Test Connection** button to check that the settings allow ConnectIt to connect ok.

Note: On successful configuration, you will receive the message "Logon Information Tested OK!" If you do not receive this message, please check the details and try again.

4. Click the **Save** button to retain the settings on the **Sage ACT! | Logon** tab.

ACT! | Transfer tab

The **Sage ACT! | Transfer** tab allows you to set up how **Company** and **Contact Details** are managed between the **Data Source** and uploading to the **Back Office Solution**.



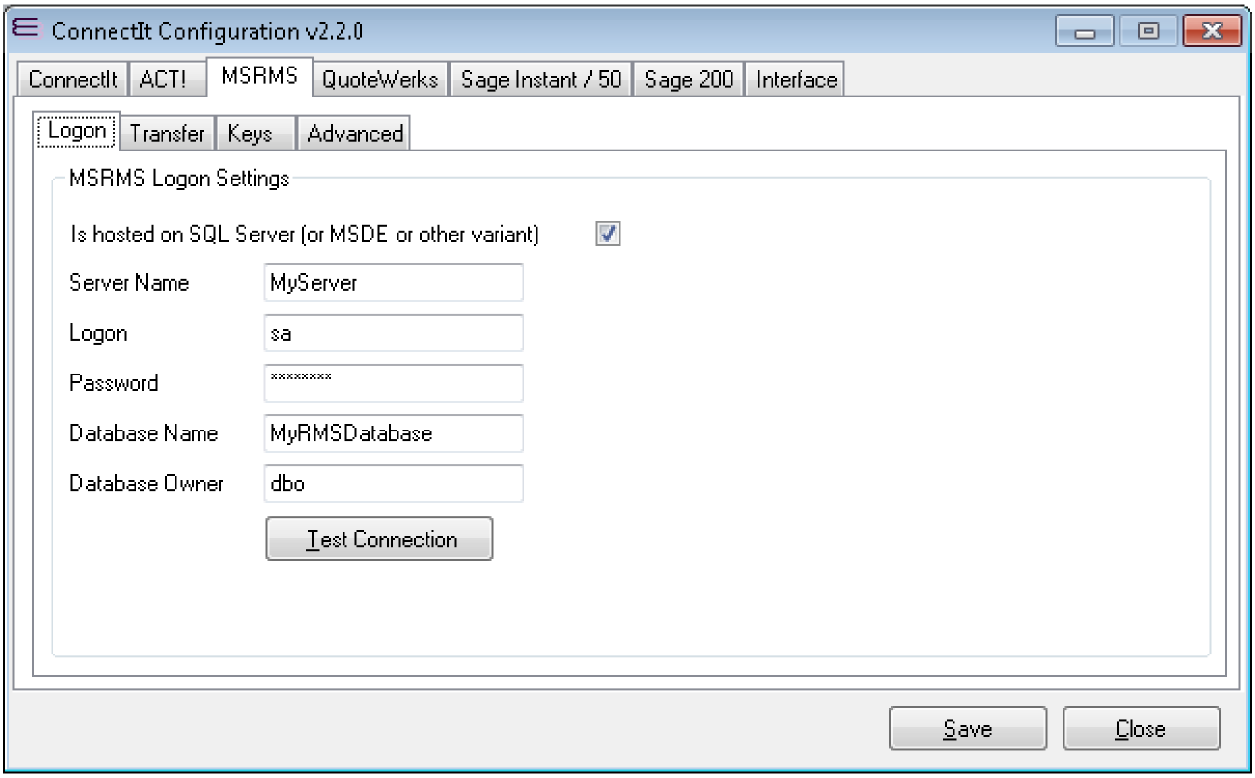
1. The **Match based on Company Name** and **Or Website Address** control which fields in **Sage ACT!** that **ConnectIt** will use to link the Company information from the **Data Source** to **Company** records in **Sage ACT!**. Select the appropriate options for the **Data Source** being set up.
2. If **ConnectIt** should create a **Company** record in **Sage ACT!** if it cannot be matched, then tick the **Allow Company to be created** option.

Note: if the Allow Company to be created option is not ticked and the Company from the Data Source cannot be found in Sage ACT!, then the upload may fail.

3. Click the **Save** button to retain the settings on the **Sage ACT! | Transfer** tab.

Microsoft RMS | Logon tab

The **Microsoft RMS | Logon** tab enables the connection to the database where the **Data Source** information will be created to be set up and tested.



1. If you are running an application which is hosted on SQL Server, MSDE or SQL Express, etc, then tick the **Is hosted on SQL Server (or MSDE or other variant)** option box. The login details can now be populated.
2. Enter the **Server Name**, **Logon**, **Password**, **Database Name** and **Database Owner** information for the database where the application holds the information.
3. Click the **Test Connection** button to check that the settings are correct.

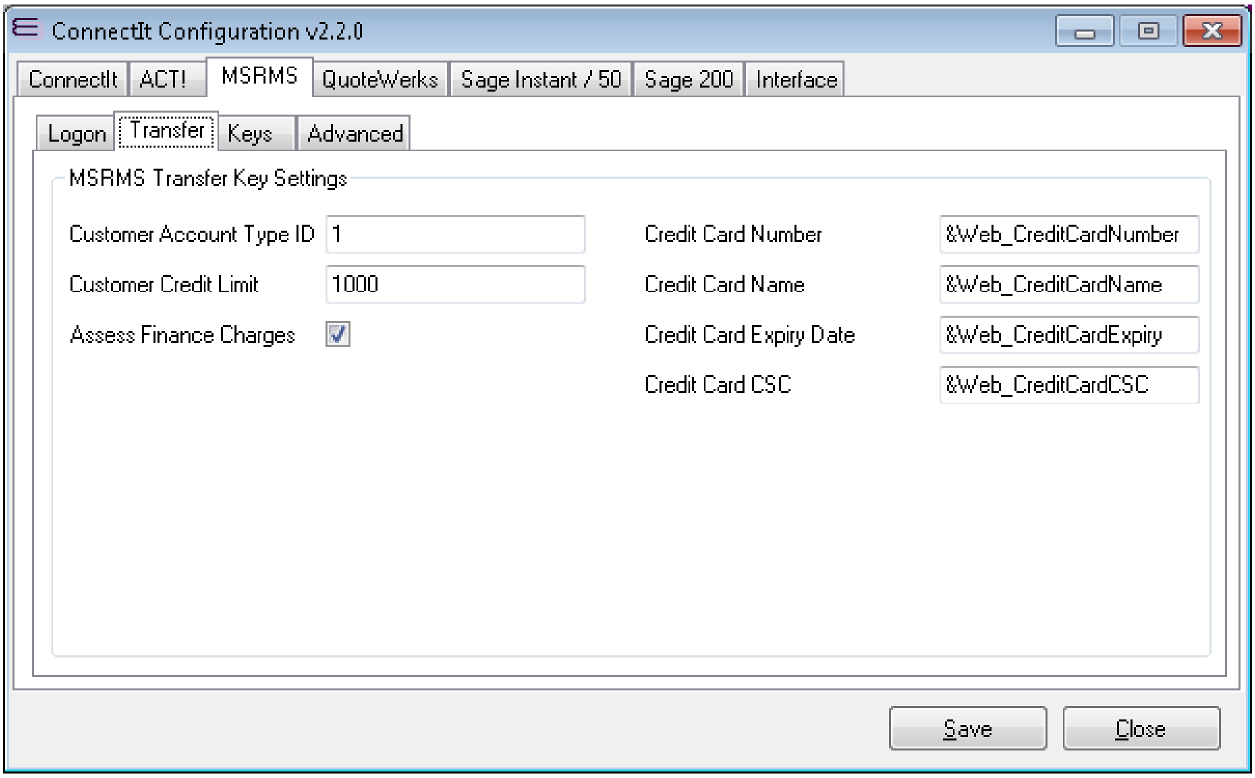
Note: On successful configuration, you will receive the message "Logon Information Tested OK!" If you do not receive this message, please check the details and try again.

4. Click the **Save** button to retain the settings on the **Microsoft RMS | Logon** tab.

Microsoft RMS | Transfer tab

The **Microsoft RMS | Transfer** tab allows you to set up how Microsoft RMS-specific information is transferred from the **Data Source** and created in the back office solution.

Note: the values in the screenshot below and those configured as part of the default **ConnectIt Professional** installation illustrate a typical installation, but there is considerable scope for modifying these settings using the conventions described in the **ConnectIt | Document tab** section above.

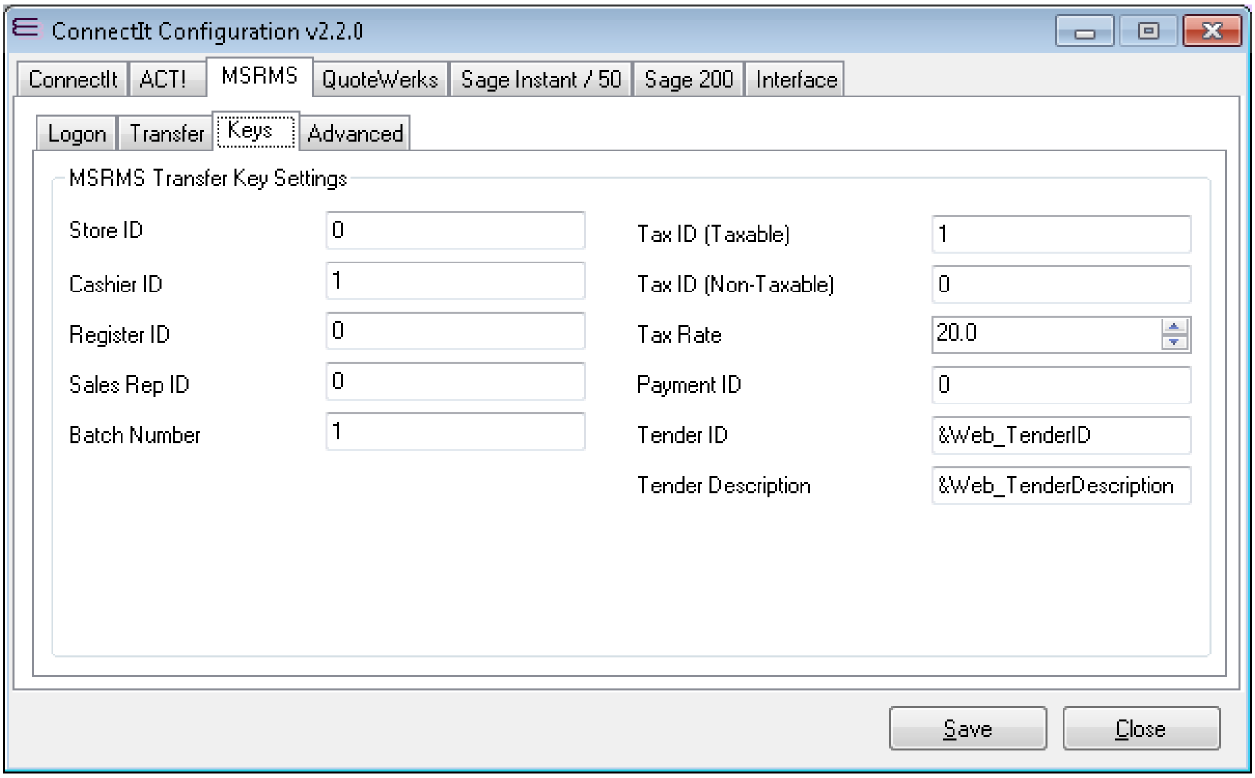


1. Enter the appropriate values for the **Microsoft RMS Transfer Key Settings**.
2. Click the **Save** button to retain the settings on the **Microsoft RMS | Transfer** tab.

Microsoft RMS | Keys tab

The **Microsoft RMS | Keys** tab allows you to set up how Microsoft RMS-specific information is transferred from the **Data Source** and created in the back office solution.

Note: the values in the screenshot below and those configured as part of the default **ConnectIt Professional** installation illustrate a typical installation, but there is considerable scope for modifying these settings using the conventions described in the **ConnectIt | Document tab** section above.

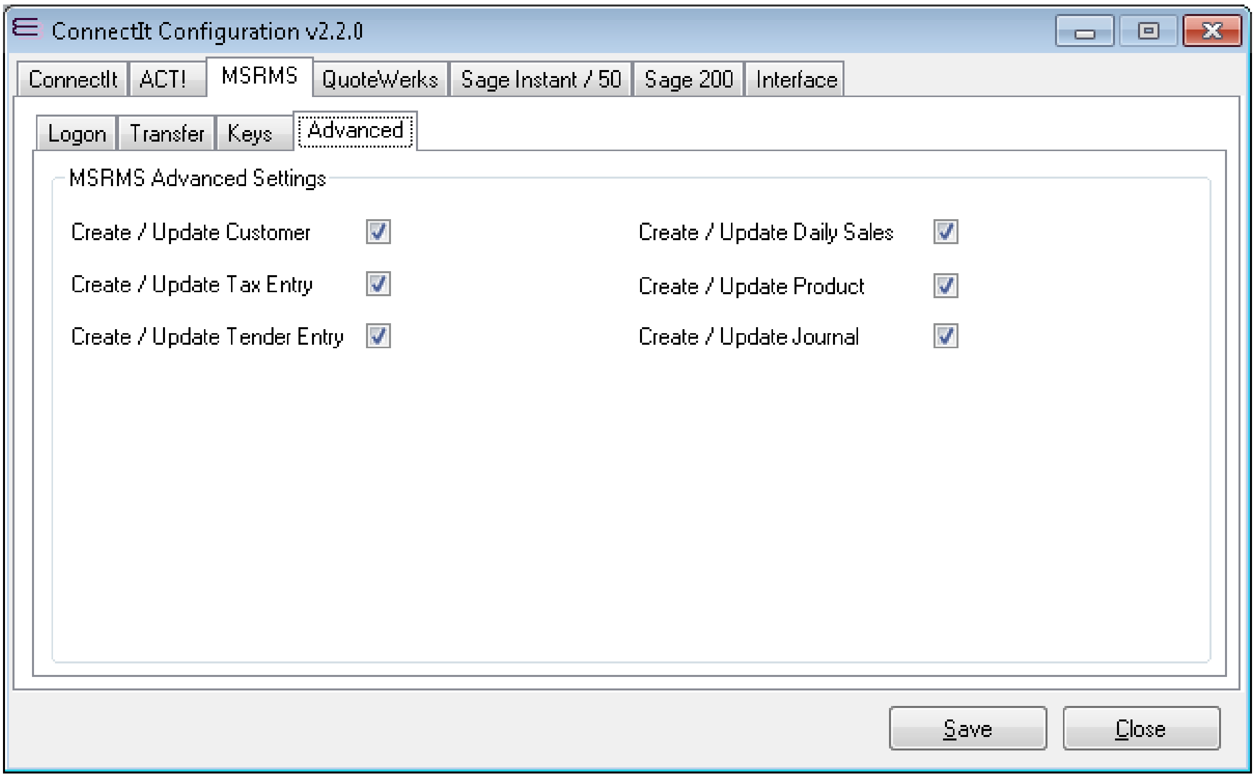


1. Enter the appropriate value for the **Microsoft RMS Transfer Key Settings**.
2. Click the **Save** button to retain the settings on the **Microsoft RMS | Transfer** tab.

Microsoft RMS | Advanced tab

The **Microsoft RMS | Advanced** tab allows you to set up which records are created / updated when specific information is transferred from the **Data Source** and created in the back office solution.

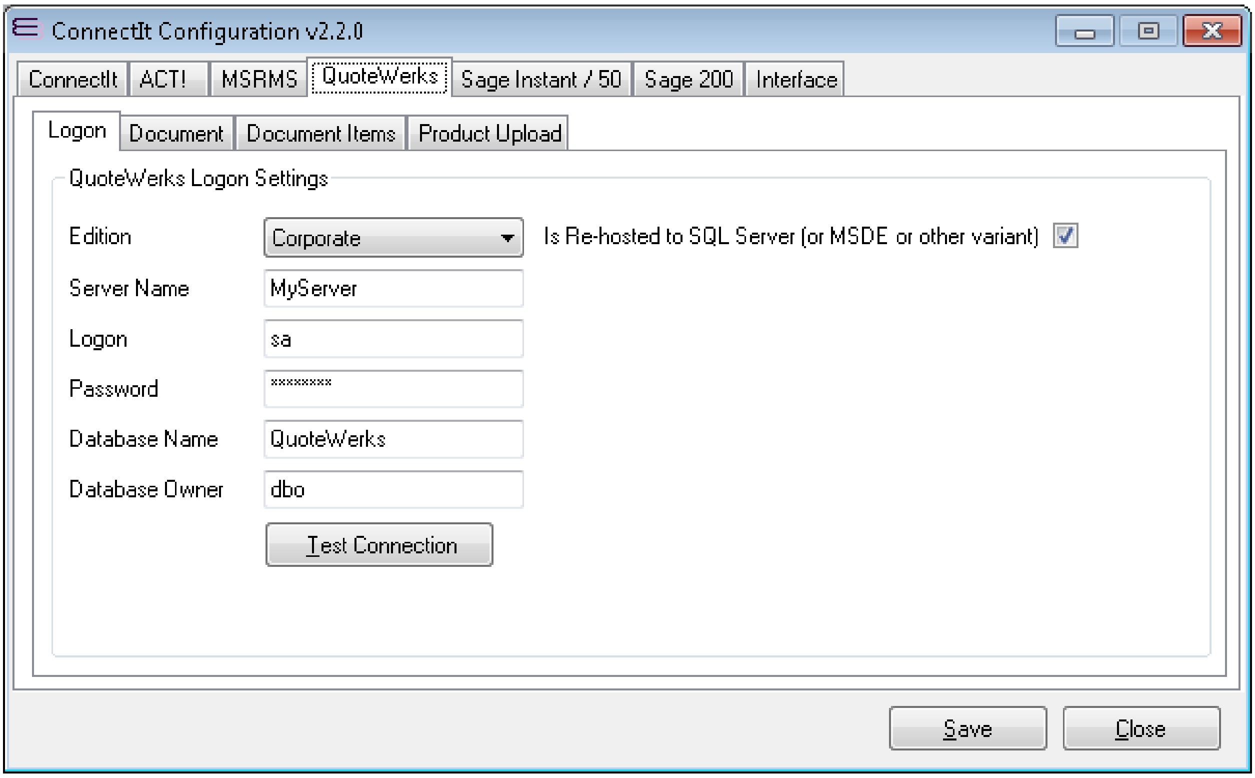
Note: typically ALL boxes should be checked here. It is only for advanced debugging use that any of these options may need to be unchecked. Unchecking any of the options may cause unexpected results when transferring information from the Data Source.



1. If you have been advised to uncheck any of the options here for advanced debugging purposes, then uncheck the appropriate option. Otherwise, please ensure that all options are checked for the **Microsoft RMS Advanced Settings**.
2. Click the **Save** button to retain the settings on the **Microsoft RMS | Advanced** tab.

QuoteWerks | Logon tab

The **QuoteWerks | Logon** tab enables the connection to the database where the Data Source information will be created to be set up and tested.



1. Microsoft Access and SQL Server database types are supported by **ConnectIt Professional**. If you are running an application which is hosted on SQL Server, MSDE or other variant, then tick the **Is hosted on SQL Server (or MSDE or other variant)** option box. The login details can now be populated.
2. Enter the **Server Name**, **Logon**, **Password**, **Database Name** and **Database Owner** information for the database where the application holds its information.
3. Click the **Test Connection** button to check that the settings are correct.

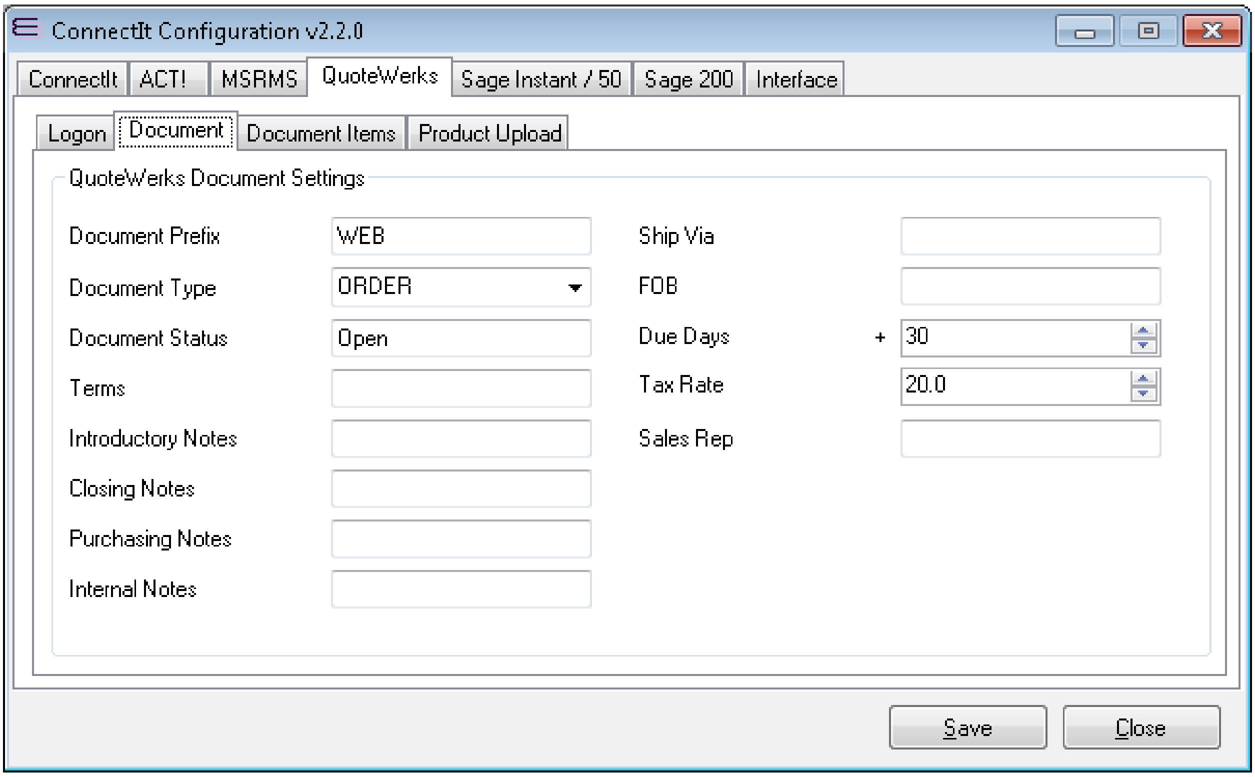
Note: On successful configuration, you will receive the message "Logon Information Tested OK!" If you do not receive this message, please check the details and try again.

4. Click the **Save** button to retain the settings on the **Logon** tab.

QuoteWerks | Document tab

The **QuoteWerks | Document** tab allows you to set up how QuoteWerks-specific information is transferred from the **Data Source** and created in the back office solution.

Note: the values in the screenshot below and those configured as part of the default **ConnectIt Professional** installation illustrate a typical installation, but there is considerable scope for modifying these settings using the conventions described in the **ConnectIt | Document tab** section above.

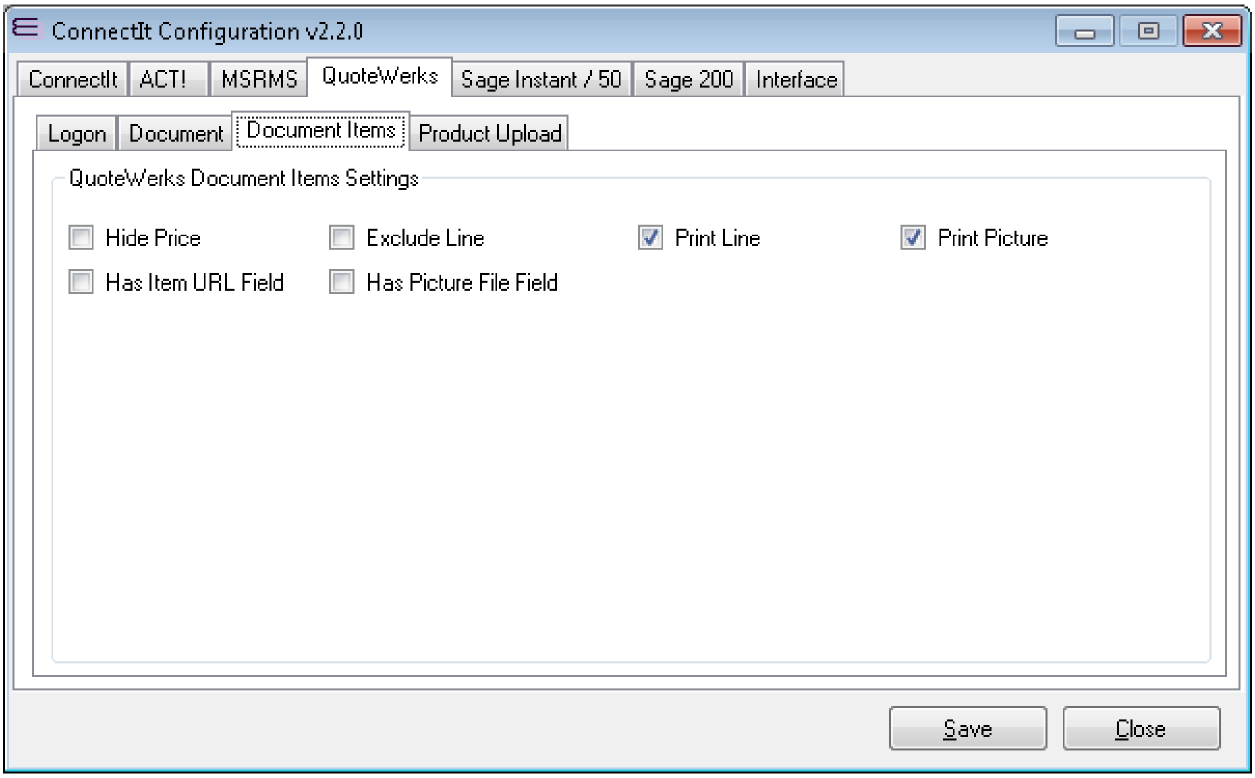


1. Enter the appropriate values for the **QuoteWerks Document Settings**.

2. Click the **Save** button to retain the settings on the **QuoteWerks | Document** tab.

QuoteWerks | Document Items tab

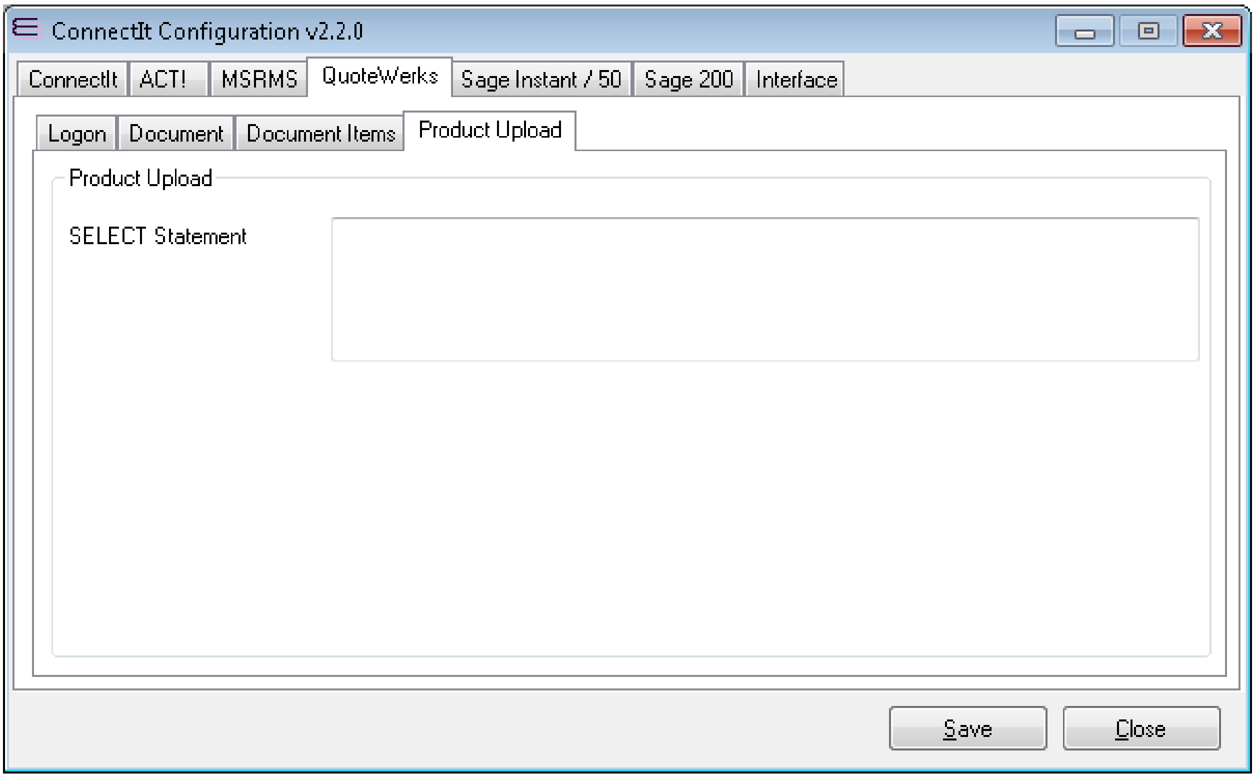
The **QuoteWerks | Document Items** tab allows you to set up how QuoteWerks-specific information is transferred from the **Data Source** and created in the back office solution.



1. Enter the appropriate values for the **QuoteWerks Document Items Settings**.
2. Click the **Save** button to retain the settings on the **QuoteWerks | Document Items** tab.

QuoteWerks | Product Upload tab

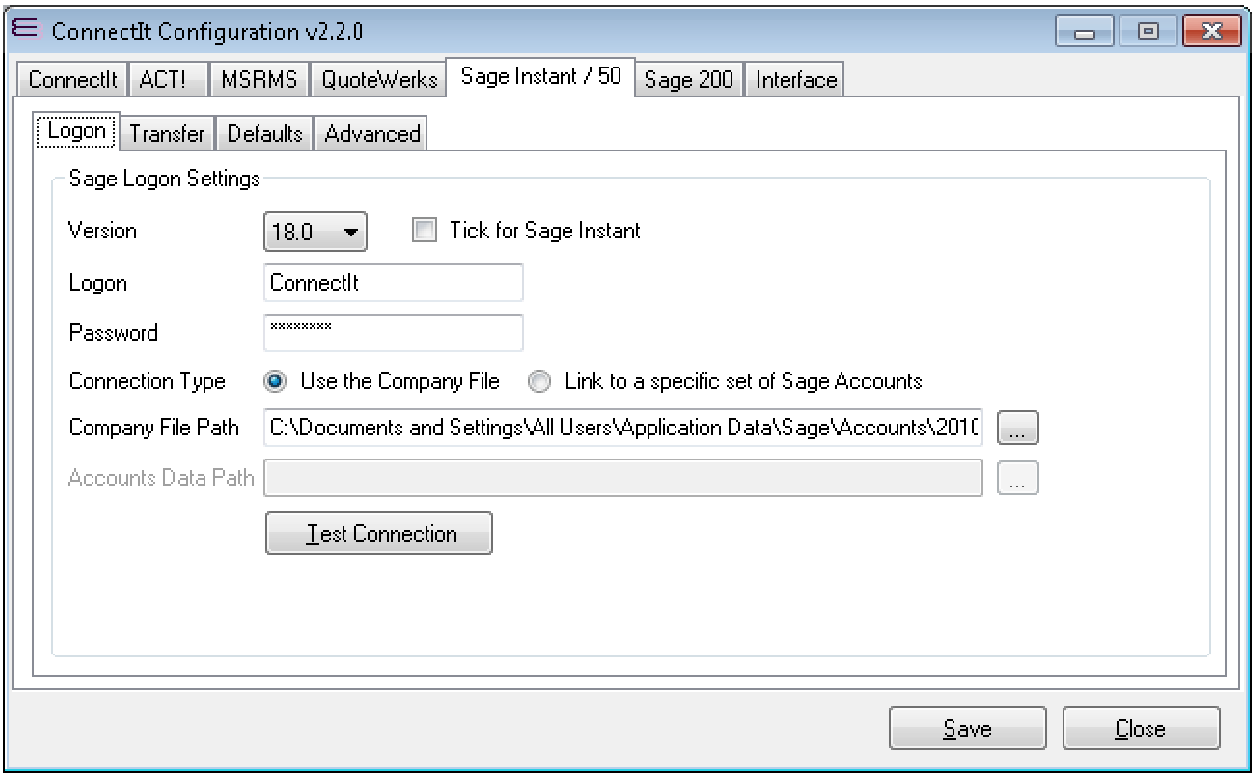
The **QuoteWerks | Product Upload** tab allows you to set up the product upload from the QuoteWerks database.



1. Enter the appropriate SQL script for the **Product Upload SQL Select Statement**.
2. Click the **Save** button to retain the settings on the **QuoteWerks | Product Upload** tab.

Sage Instant / 50 | Login tab

The **Sage Instant / 50 | Logon** tab enables the connection to the database where the **Data Source** information will be created to be set up and tested.



1. On the **Sage** tab, select the **Version** of **Sage** that you are running and then enter your **Logon**, and **Password**, as appropriate for your **Sage** installation.
2. Select the **Connection Type** you would like to create; this is particularly useful if you run multiple sets of **Sage** accounts.

If selecting the **Use the Company File** option, **ConnectIt** will automatically read the list of accounts from the **Sage** COMPANY file – if just one set of accounts is set up, then **ConnectIt** will link to this set of accounts, but if more than one set of accounts are available, then **ConnectIt** will prompt the user to select which set of accounts to send the **QuoteWerks** document information to each time a transfer is made.

If selecting the **Link to a specific set of Sage Accounts** option, **ConnectIt** will link only to the specified set of **Sage** accounts. If multiple sets of accounts have been set up, then the user will not be prompted to select which set of accounts to send the **QuoteWerks** document information to. The **QuoteWerks** document information will always be sent to the set of accounts as specified in the Company File path.

3. Set the appropriate path.

When using the **Use the Company File** option, the **Company File Path** must be entered. The Company File Path is the path where the **Sage** COMPANY file resides (see screenshots below). The path can either be free typed or the Company button can be clicked and the path selected from the folder dialogue.

When using the **Link to a specific set of Sage Accounts** option, the **Accounts Data Path** must be entered. The Accounts Data Path is the path to the ACCDATA folder of the set of accounts that you would like **ConnectIt** to send the **QuoteWerks** document information to. The default path is C:\Program Files\Sage\Accounts\ACCDATA\, but in a production or multi-user environment, this may be on a server, for example, \\myServer\myShare\Sage\ACCDATA\ (or similar).

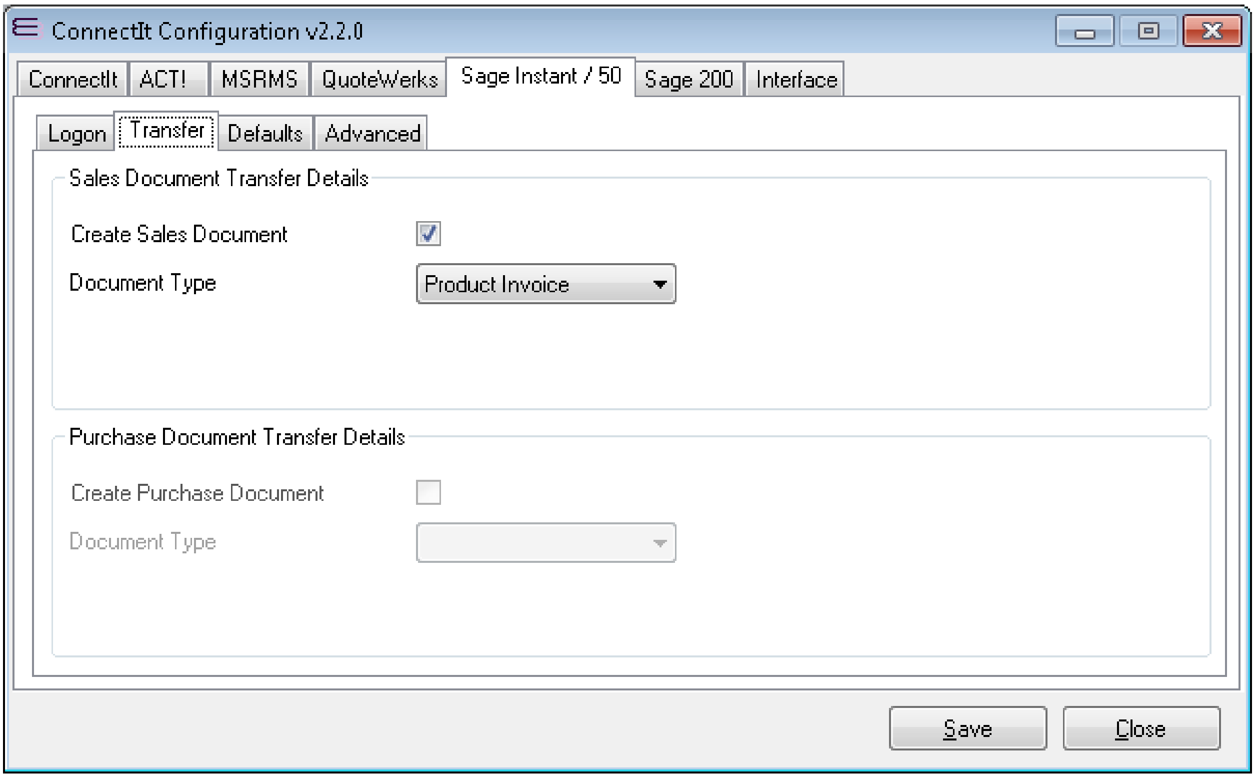
4. Click the **Test Connection** button to check that the settings are correct.

Note: On successful configuration, you will receive the message "Logon Information Tested OK!" If you do not receive this message, please check the details and try again.

5. Click the **Save** button to retain the settings on the **Sage Instant / 50 | Logon** tab.

Sage Instant / 50 | Transfer tab

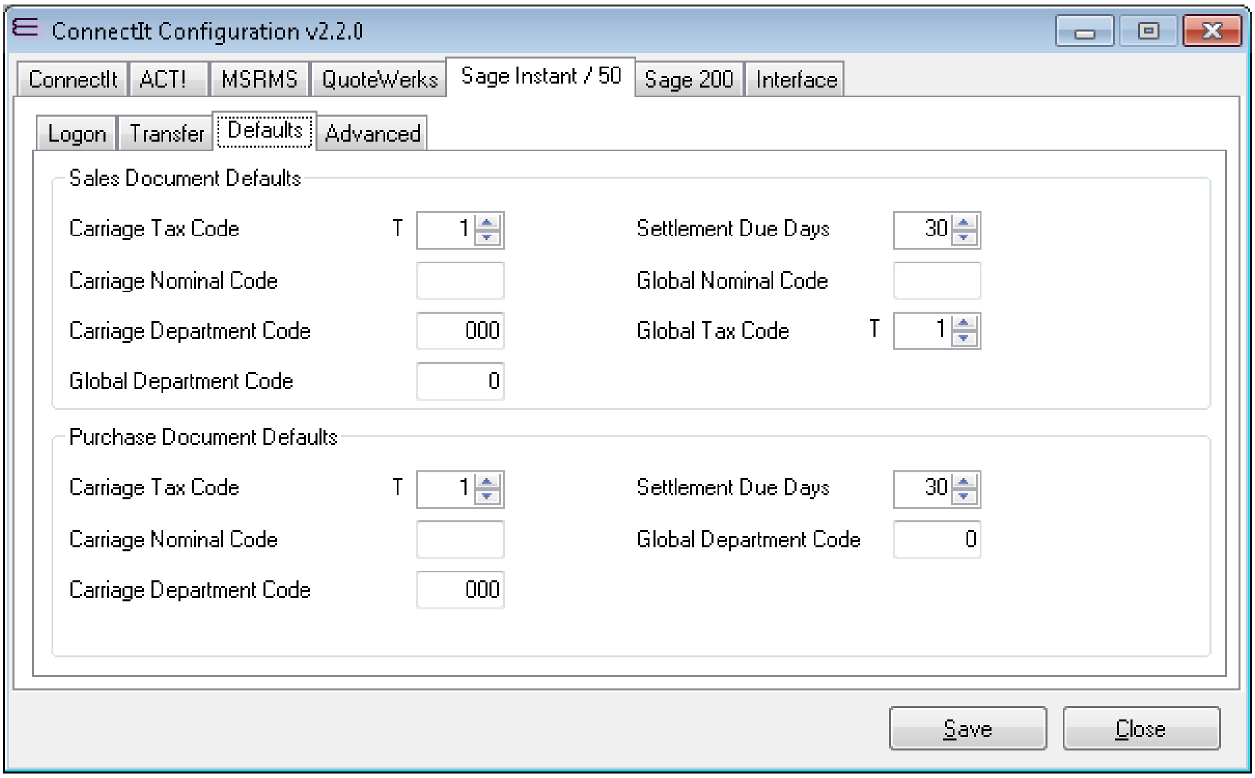
The **Sage Instant / 50 | Transfer** tab allows you to set up what Documents and types of Document will be created when information is transferred from the **Data Source** and created in the back office solution.



1. If you would like to create a Sales-type document when information is transferred from the **Data Source**, tick the **Create Sales Document** tick box. Ticking the **Create Sales Document** tick box will enable that **Sales Document Transfer Details Document Type** dropdown for you to select which type of sales document you would like to have created.
2. If you would like to create a Purchase-type document when information is transferred from the **Data Source**, tick the **Create Purchase Document** tick box. Ticking the **Create Purchase Document** tick box will enable that **Purchase Document Transfer Details Document Type** dropdown for you to select which type of sales document you would like to have created.
3. Click the **Save** button to retain the settings on the **Sage Instant / 50 | Transfer** tab.

Sage Instant / 50 | Defaults tab

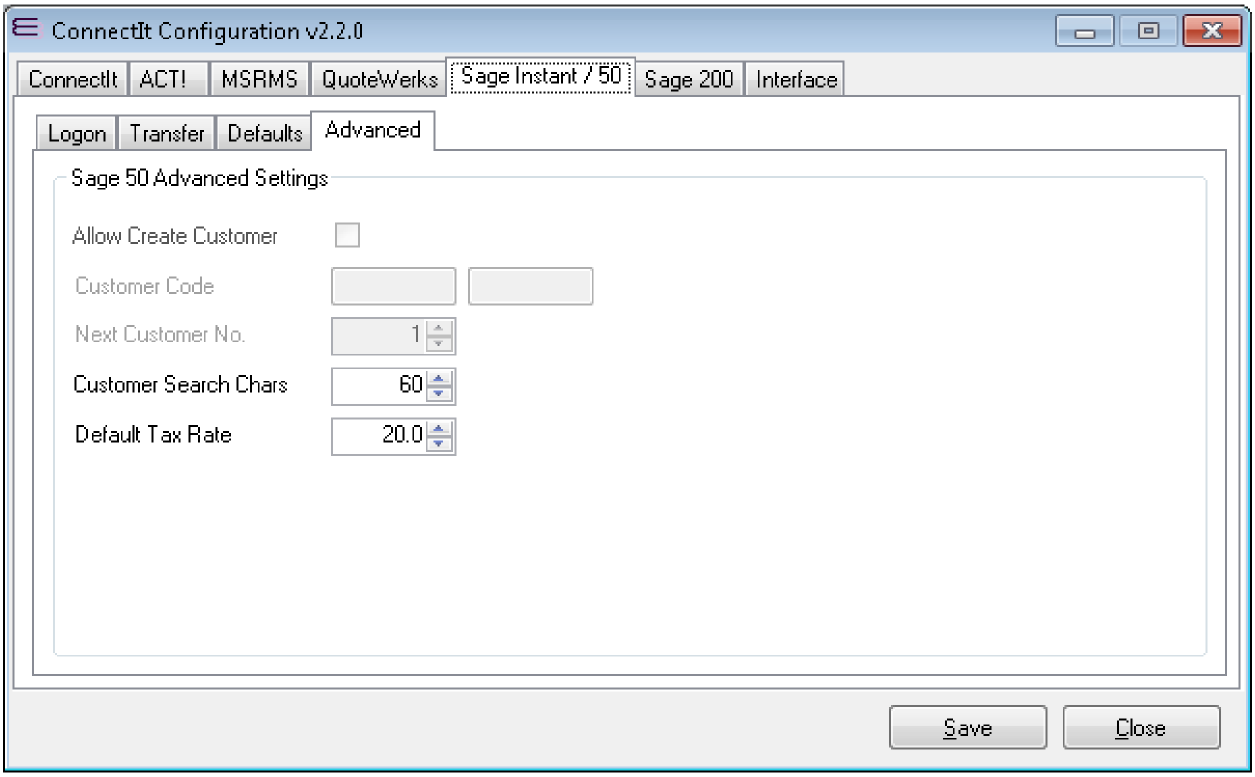
The **Sage Instant / 50 | Transfer** tab allows you to set up how Microsoft RMS-specific information is transferred from the **Data Source** and created in the back office solution.



1. Enter the appropriate values for the **Sales** and **Purchase Document Default Settings**.

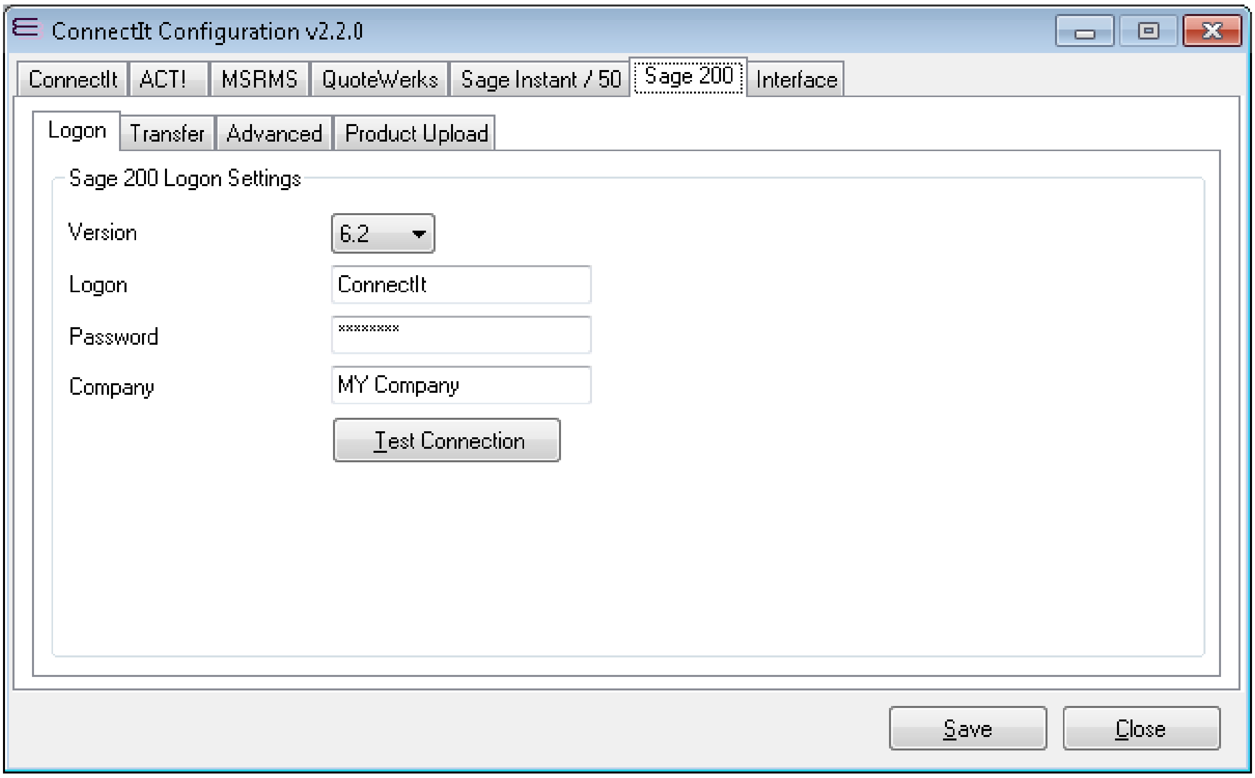
2. Click the **Save** button to retain the settings on the **Sage Instant / 50 | Transfer** tab.

Sage Instant / 50 Advanced tab



Sage 200 | Login tab

The **Sage 200 | Logon** tab enables the connection to the **Company** files where the **Data Source** information will be created to be set up and tested.



3. On the **Sage** tab, select the **Version** of **Sage** that you are running and then enter your **Logon**, and **Password**, as appropriate for your **Sage** installation.

4. Type the name of the **Company** that you would like documents, customers, products and suppliers to be created in.

5. If you run multiple sets of **Sage** accounts, then tick the **Allow User to Select Company For Each Transfer** option. **ConnectIt** will automatically read the list of accounts from the **Sage** installation – if just one set of accounts is set up, then **ConnectIt** will link to this set of accounts, but if more than one set of accounts are available, then **ConnectIt** will prompt the user to select which set of accounts to send the **QuoteWerks** document information to each time a transfer is made.

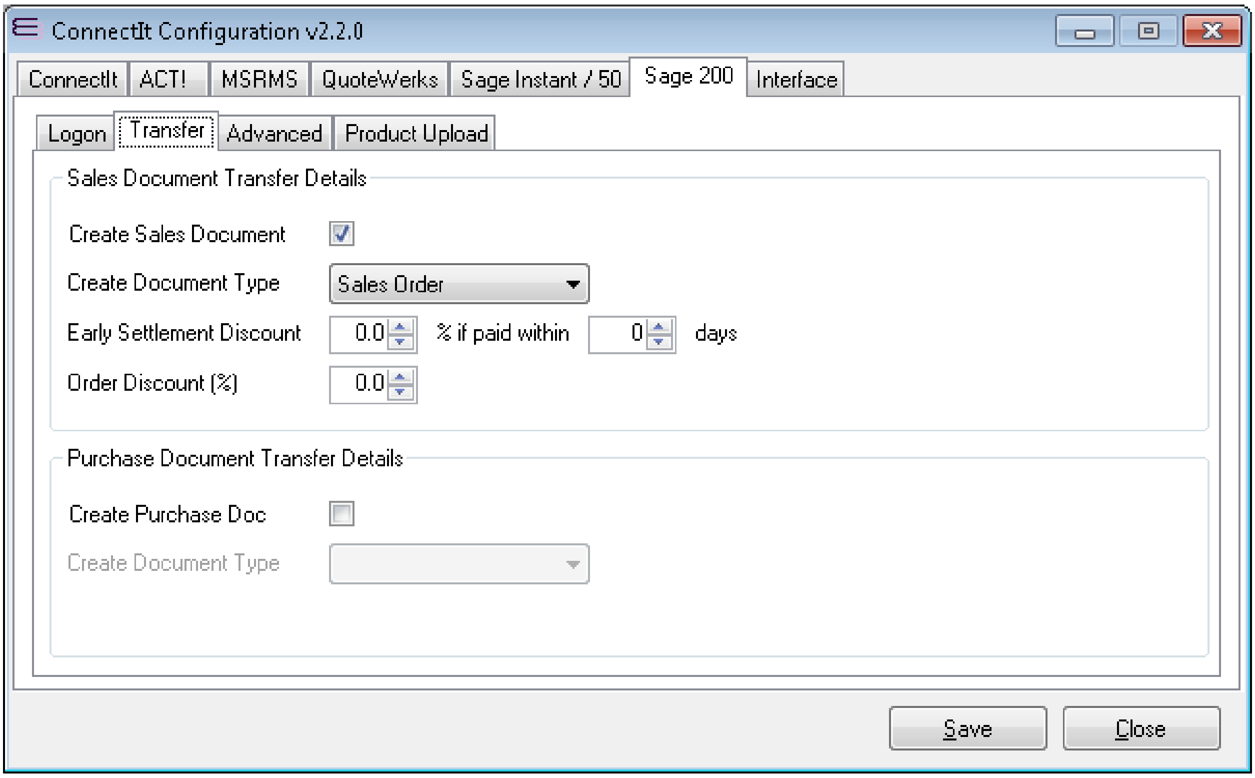
6. Click the **Test Connection** button to check that the settings are correct.

Note: On successful configuration, you will receive the message "Logon Information Tested OK!" If you do not receive this message, please check the details and try again.

7. Click the **Save** button to retain the settings on the **Sage 200 | Logon** tab.

Sage 200 | Transfer tab

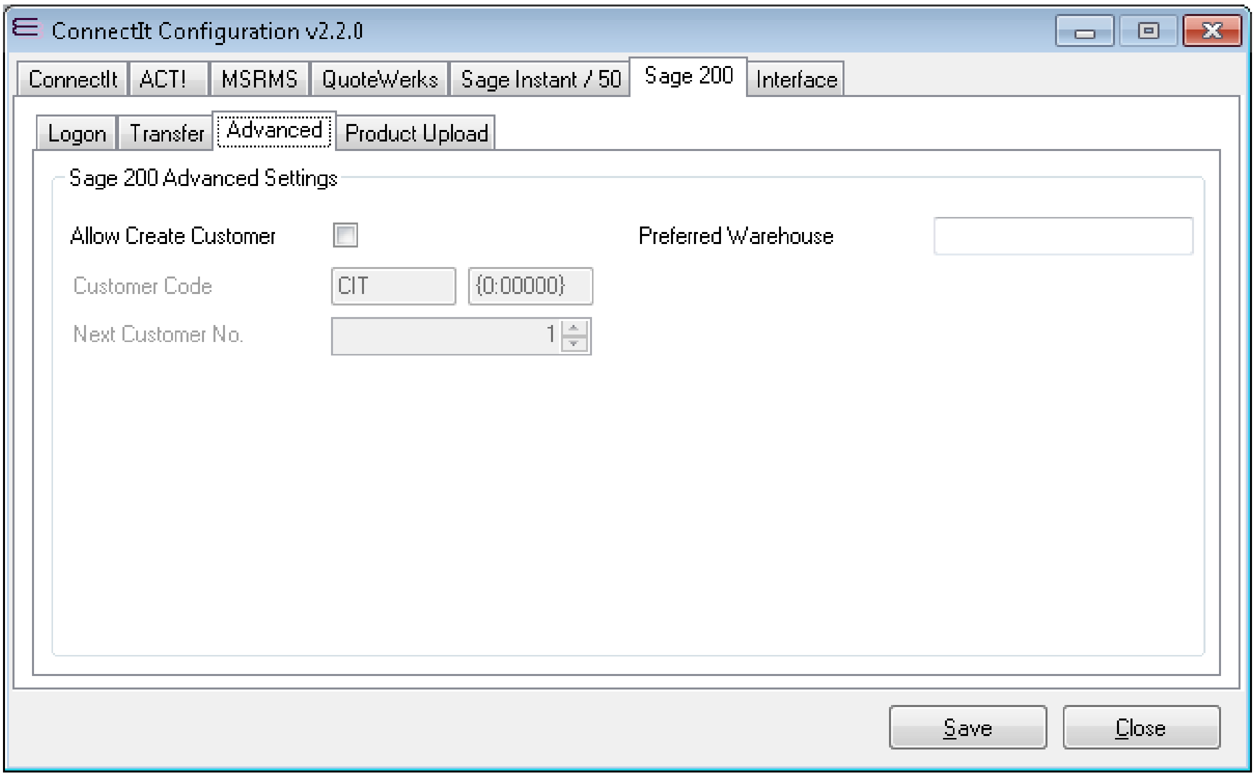
The **Sage 200 | Transfer** tab allows you to set up what documents and types of document will be created when information is transferred from the **Data Source** and created in the back office solution.



1. If you would like to create a Sales-type document when information is transferred from the **Data Source**, tick the **Create Sales Document** tick box. Ticking the **Create Sales Document** tick box will enable that **Sales Document Transfer Details Document Type** dropdown for you to select which type of sales document you would like to have created.
2. If you would like to create a Purchase-type document when information is transferred from the **Data Source**, tick the **Create Purchase Document** tick box. Ticking the **Create Purchase Document** tick box will enable that **Purchase Document Transfer Details Document Type** dropdown for you to select which type of sales document you would like to have created.
3. Click the **Save** button to retain the settings on the **Sage Instant / 50 | Transfer** tab.

Sage 200 | Advanced tab

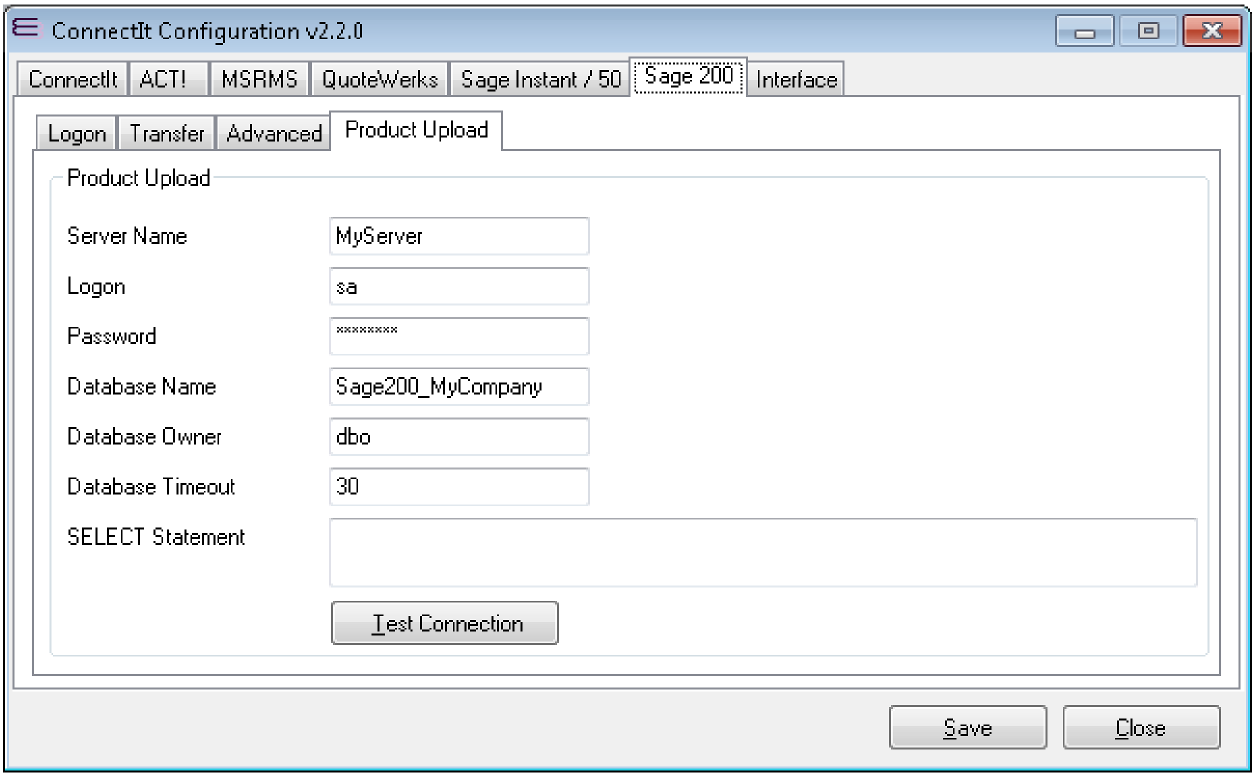
The **Sage 200 | Advanced** tab allows you to set up more advanced transfer settings.



1. Enter the appropriate values for the **Sage 200 Advanced Settings**.
2. Click the **Save** button to retain the settings on the **Sage 200 | Advanced** tab.

Sage 200 | Product Upload tab

The **Sage 200 | Product Upload** tab allows you to set up the product upload from the Sage 200 database.



1. SQL Server databases are supported by **ConnectIt Professional**. Enter the **Server Name**, **Logon**, **Password**, **Database Name** and **Database Owner** information for the database where the application holds its information.
2. Click the **Test Connection** button to check that the settings are correct.

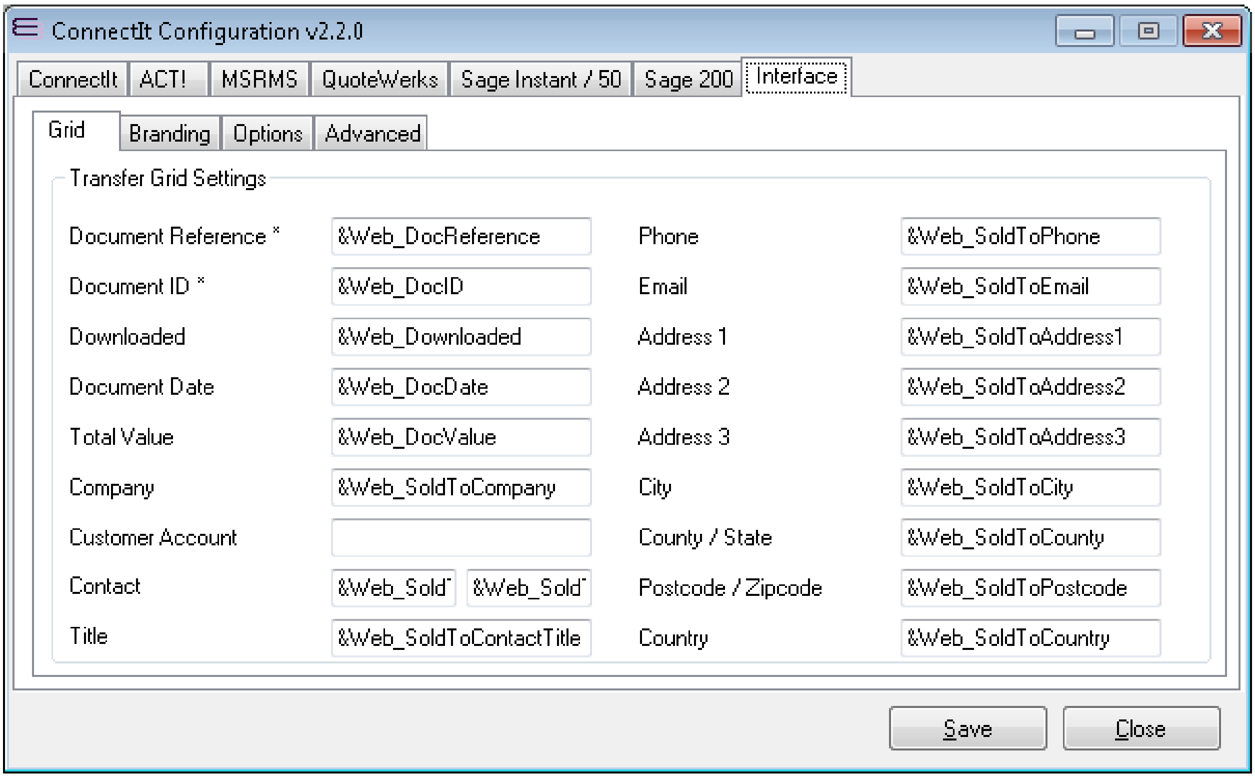
Note: On successful configuration, you will receive the message "Logon Information Tested OK!" If you do not receive this message, please check the details and try again.

3. Click the **Save** button to retain the settings on the **Sage 200 | Product Upload** tab.

Interface | Grid tab

The **ConnectIt | Interface** tab allows you to set **ConnectIt Professional** basic interface settings that control how **ConnectIt Professional** looks by default.

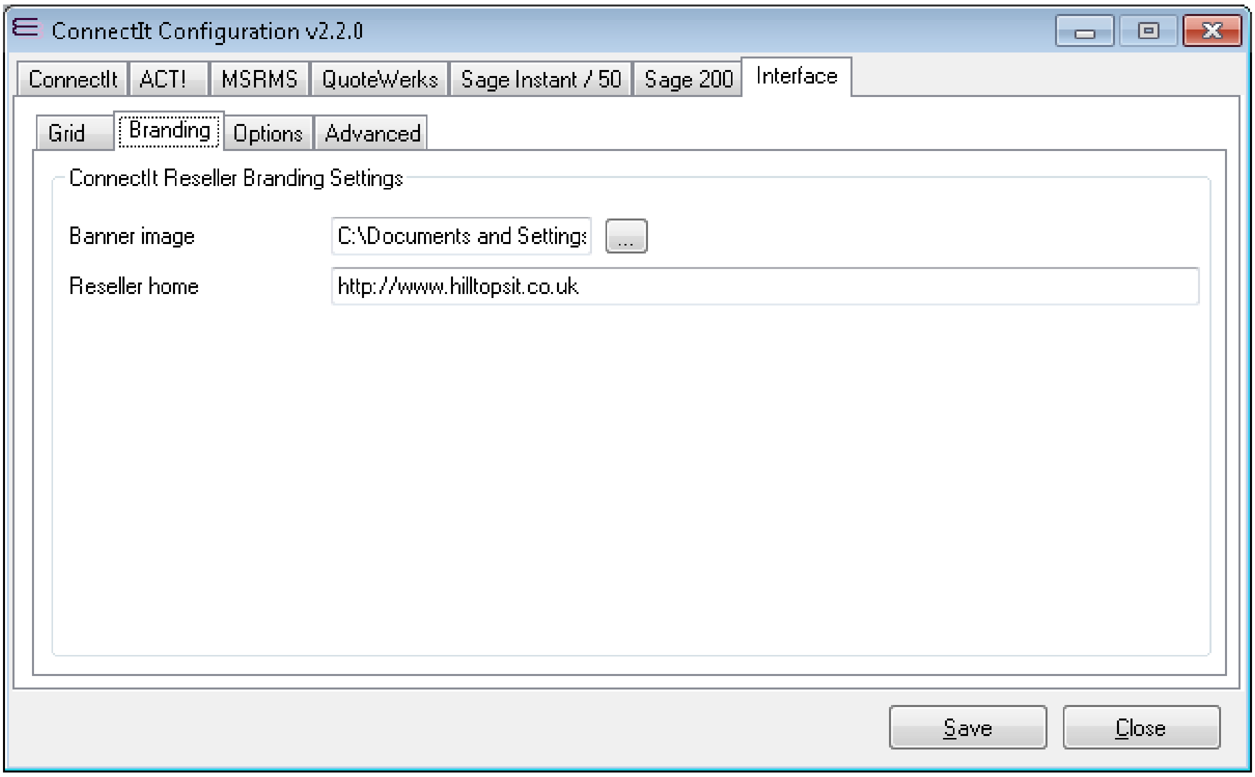
Note: the values in the screenshot below and those configured as part of the default **ConnectIt Professional** installation illustrate a typical installation, but there is considerable scope for modifying these settings using the “&Web_” prefix described in the **ConnectIt | Document tab** section above.



4. Click the **Save** button to retain the settings on the **ConnectIt | Interface** tab.

Interface | Branding tab

The **Interface | Branding** tab allows you to set the reseller branding of **ConnectIt Professional**.



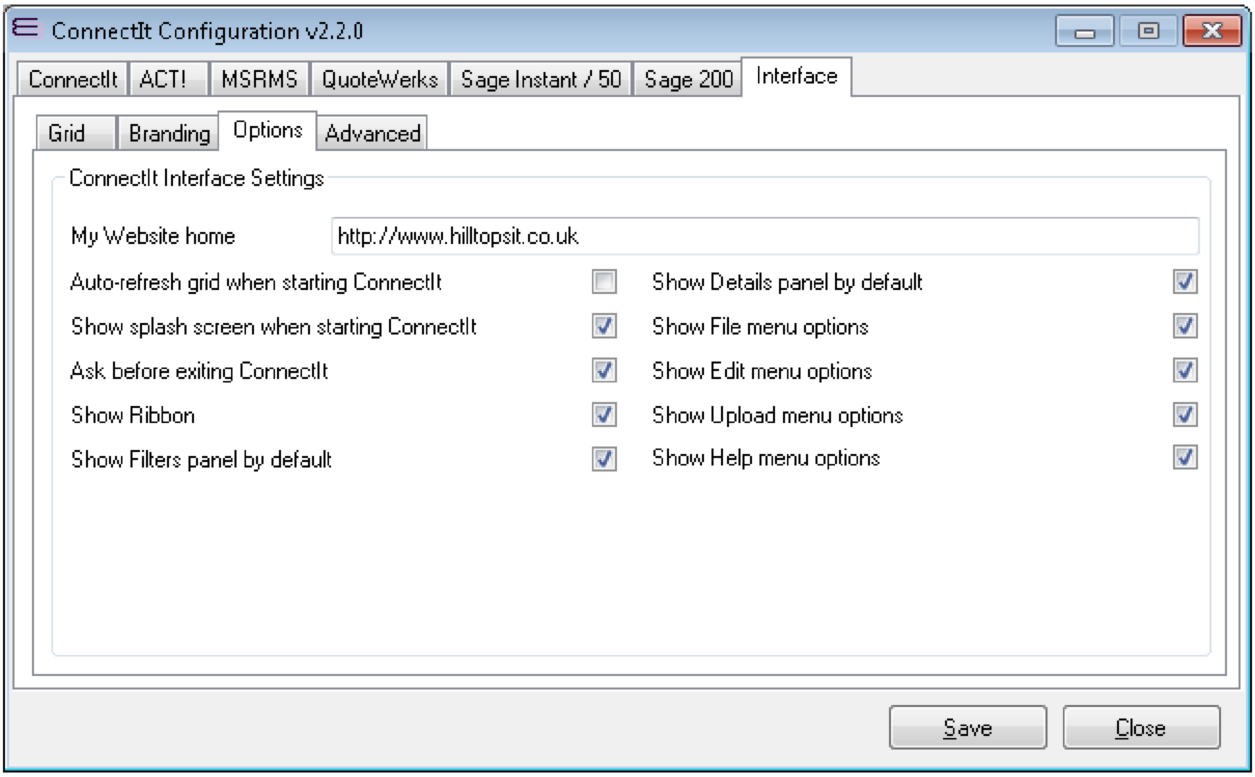
1. Set **Reseller Image**, this is the path to your reseller image. This will appear in the ribbon of **ConnectIt Professional**. Click the file dialogue button to find the appropriate image.

Note: For best results the Image should be 180x150. ConnectIt Professional supports a variety of image formats we suggest using JPEG or GIF files.

1. Set **Reseller home**, **ConnectIt Professional** will open this page if you click the **Contact My Reseller** button. This will allow you to quickly and easily navigate to the site.

2. Click the **Save** button to retain the settings on the **ConnectIt | Advanced Interface** tab.

Inteface | Options tab



1. Set **My Website home. ConnectIt Professional** will open this page if you click the **My Website Home** button from the main **ConnectIt** user interface allowing you to quickly and easily navigate to your site.
2. If you would like the **Results** grid to auto-refresh when opening **ConnectIt Professional**, then tick **Auto-refresh grid when starting ConnectIt** option.
3. If you would like hide the **ConnectIt Professional** splash screen, then un-tick the **Show splash screen when starting ConnectIt** option.
4. If you don't want **ConnectIt Professional** to ask before exiting, then un-tick the **Ask before exiting ConnectI** option.
5. The **Show Ribbon, Show Filters panel by default** and **Show Details panel by default** allow you to set which of these are visible when **ConnectIt Professional** first opens. To hide any of these panels un-tick the corresponding checkbox.

Note: You can show or hide the above options while using ConnectIt Professional so these options are purely user preference and are not be used as a way of restricting users from accessing functionality.

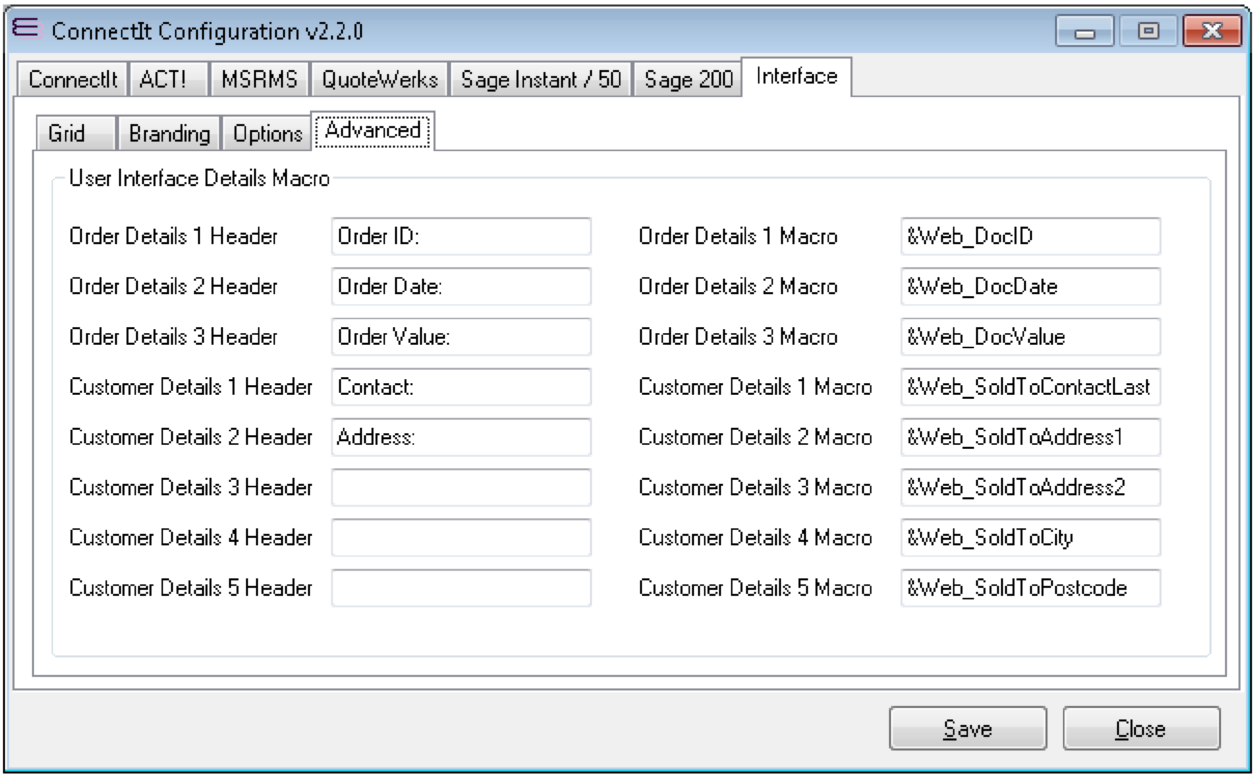
6. The **Show File menu options, Show Edit menu options, Show Upload menu options** and **Show Help menu options** allow you to configure which menus are visible in the Ribbon.

You cannot show/hide these options from within the ConnectIt Professional interface, so these options do allow you to control which options are visible for users.

Interface| Advanced Interface tab

The **Interface | Advanced Interface** tab allows you to set **ConnectIt Professional** Advanced interface settings that control how the Details panel of **ConnectIt Professional** looks and the data that is shown.

Note: the values in the screenshot below and those configured as part of the default **ConnectIt Professional** installation illustrate a typical installation, but there is considerable scope for modifying these settings using the "&Web_" prefix described in the **ConnectIt | Document tab** section above.



1. Set **Order Details 1 – 10 Header**, these values are used as the labels for the details sections. Enter the appropriate values or leave as the defaults if appropriate.
2. Set **Order Details 1 – 10 Macro**, these options control what data appears in the details section. Enter the appropriate values or leave as the defaults if appropriate.
3. Click the **Save** button to retain the settings on the **ConnectIt | Advanced Interface** tab.

Appendix of Configuration Macro Options

The "**NEW**" keyword is available in the following field locations:

<table>
<tr><th>Configuration Option</th><th>MSRMS</th><th>QuoteWerks</th><th>Sage 50</th><th>Sage 200</th><th>Sage ACT</th></tr>
<tr><td colspan="6">ConnectIt | Document Configuration options</td></tr>
<tr><td>Main | Document Code</td><td>Yes</td><td>Yes</td><td>Yes</td><td>Yes</td><td></td></tr>
<tr><td>Main | Customer Account</td><td></td><td></td><td>Yes</td><td>Yes</td><td></td></tr>
</table>

The "**LINK**" keyword is available in the following field locations:

<table>
<tr><th>Configuration Option</th><th>MSRMS</th><th>QuoteWerks</th><th>Sage 50</th><th>Sage 200</th><th>Sage ACT</th></tr>
<tr><td colspan="6">ConnectIt | Document Configuration options</td></tr>
<tr><td>Sold To | Company Name</td><td></td><td></td><td>Yes</td><td></td><td></td></tr>
<tr><td>Sold To | Address 1 (picks up all address lines)</td><td></td><td></td><td>Yes</td><td></td><td></td></tr>
<tr><td>Ship To | Company Name</td><td></td><td></td><td>Yes</td><td></td><td></td></tr>
<tr><td>Ship To | Address 1 (picks up all address lines)</td><td></td><td></td><td>Yes</td><td></td><td></td></tr>
<tr><td>Bill To | Company Name</td><td></td><td></td><td>Yes</td><td></td><td></td></tr>
<tr><td>Bill To | Address 1 (picks up all address lines)</td><td></td><td></td><td>Yes</td><td></td><td></td></tr>
<tr><td colspan="6">ConnectIt | Document Item Configuration options</td></tr>
<tr><td>Accounting | Sales Nominal Code</td><td></td><td></td><td>Yes</td><td></td><td></td></tr>
<tr><td>Accounting | Sales Department Code</td><td></td><td></td><td>Yes</td><td></td><td></td></tr>
<tr><td>Accounting | Sales Tax Code</td><td></td><td></td><td>Yes</td><td></td><td></td></tr>
<tr><td>Accounting | Purchase Nominal Code</td><td></td><td></td><td>Yes</td><td></td><td></td></tr>
<tr><td>Accounting | Purchase Department Code</td><td></td><td></td><td>Yes</td><td></td><td></td></tr>
<tr><td>Accounting | Purchase Tax Code</td><td></td><td></td><td>Yes</td><td></td><td></td></tr>
</table>

The "**LINK_DEL**" keyword is available in the following field locations:

<table>
<tr><th>Configuration Option</th><th>MSRMS</th><th>QuoteWerks</th><th>Sage 50</th><th>Sage 200</th><th>Sage ACT</th></tr>
<tr><td colspan="6">ConnectIt | Document Configuration options</td></tr>
<tr><td>Sold To | Company Name</td><td></td><td></td><td>Yes</td><td></td><td></td></tr>
<tr><td>Sold To | Address 1 (picks up all address lines)</td><td></td><td></td><td>Yes</td><td></td><td></td></tr>
<tr><td>Ship To | Company Name</td><td></td><td></td><td>Yes</td><td></td><td></td></tr>
<tr><td>Ship To | Address 1 (picks up all address lines)</td><td></td><td></td><td>Yes</td><td></td><td></td></tr>
<tr><td>Bill To | Company Name</td><td></td><td></td><td>Yes</td><td></td><td></td></tr>
<tr><td>Bill To | Address 1 (picks up all address lines)</td><td></td><td></td><td>Yes</td><td></td><td></td></tr>
</table>

A full list of the "**&Date_**" prefix options are as follows:

Configuration Macro	Return Value
&Date_Today	The current system date
&Date_Now	The current system date
&Date_FirstDayOfMonth	The date of the first day of the current system date month, e.g. 1 Jan 2012
&Date_FirstDayOfThisMonth	The date of the first day of the current system date month, e.g. 1 Jan 2012
&Date_LastDayOfMonth	The date of the last day of the current system date month, e.g. 31 Jan 2012
&Date_LastDayOfThisMonth	The date of the last day of the current system date month, e.g. 31 Jan 2012
&Date_DayOfMonth_X	A specific day of the current system date month, where 'X' is the specific day
&Date_DayOfThisMonth_X	A specific day of the current system date month, where 'X' is the specific day
&Date_FirstDayOfLastMonth	The date of the first day of the month previous to the current system date month, e.g. 1 Dec 2011
&Date_LastDayOfLastMonth	The date of the last day of the month previous to the current system date month, e.g. 31 Dec 2011
&Date_DayOfLastMonth_X	A specific day of the month previous to the current system date month, where 'X' is the specific day
&Date_FirstDayOfNextMonth	The date of the first day of the month after to the current system date month, e.g. 1 Feb 2012
&Date_LastDayOfNextMonth	The date of the last day of the month after to the current system date month, e.g.29 Feb 2012
&Date_DayOfNextMonth_X	A specific day of the month after to the current system date month, where 'X' is the specific day