



## Step-by-Step Guide to Order Transfer

The **ConnectIt Professional** utility provides a way to download **Enquiries** or **Orders** from your disconnected system or website into your back office software solution for processing.

Much of the default behaviour described here can be modified using the **ConnectIt Professional Configuration** utility, including running the application in “automatic” rather than the “manual” mode which is described here. Please cross-reference this document with the **ConnectIt Professional Step-by-Step Guide to Configuration** to review setup options.

### 1. Start **ConnectIt Professional**

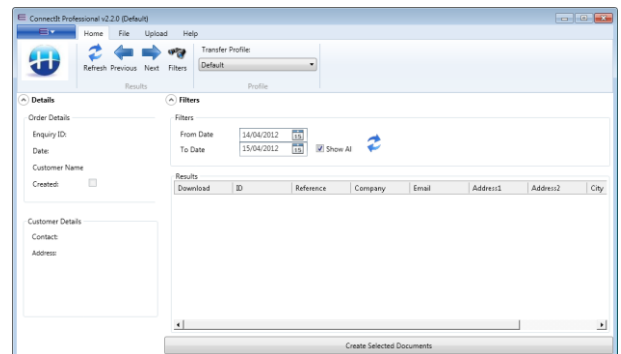
Click the **ConnectIt Professional** option from the **Start menu | ConnectIt Professional** folder.

This starts the **ConnectIt Professional** application.

### 2. Set **Filter Settings**

You will see within the **Filter** section the options to select a **From Date** and a **To Date**. By using this filter you have the ability to select **Enquiries / Orders** from past and present to download into your back office system.

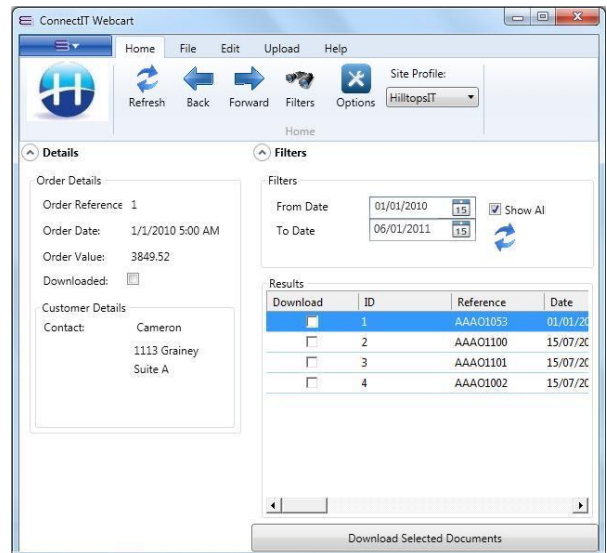
By default in **ConnectIt Professional** the **From Date** will start yesterday's date and the **To Date** will be today's date. You also have the option to select the **Show All** tick box which means that all **Enquiries / Orders** from your data source will be listed in the **Results grid**, whether they have already been downloaded or not.



### 3. Click **Refresh** button

Once you have selected either a date range and/or the **Show All** tickbox, you now need to click the **Refresh** button. Once the **Refresh** button has been clicked, the **ConnectIt Professional** utility will return Results based on your filter settings.

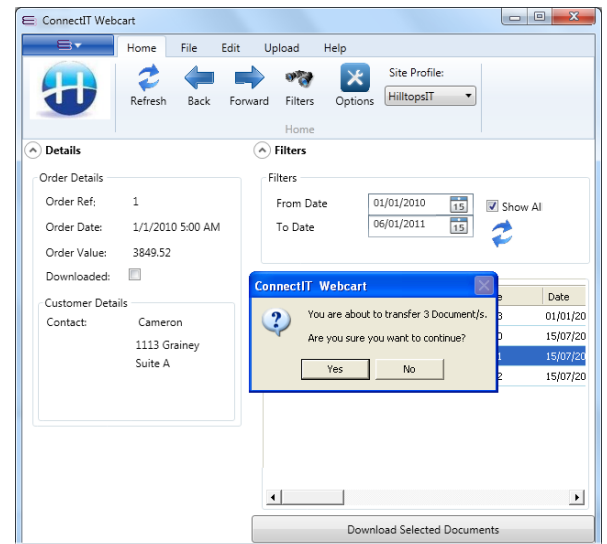
If **ConnectIt Professional** cannot find any **Enquiries / Orders** from your data source, you will receive a prompt saying “No orders were found in the specified date range. Please change the From and/or To Date(s) and try again.”



### 4. Select **Enquiries / Orders** to **Create**

**ConnectIt Professional** now gives you the option to select which **Enquiries / Orders** you would like to create in your back office system. You do this by selecting the **Download** tick box on the grid next to the **Enquiries / Orders** you wish to download. The **ConnectIt Professional** utility has been designed to allow for multiple selections. Once you have selected which **Enquiries / Orders** you would like to download, click the **Create Selected Documents** button.

If you have selected any **Enquiries / Orders** that have already been transferred into back office system, **ConnectIt Professional** will warn you about this and will ask you if you want to continue. Press **Yes** to continue and download the **Enquiries / Orders** you have selected.



## 5. Document Transfer Successful

ConnectIt Professional tells you that the **Enquiries / Orders** have now been successfully created in back office system. Click OK to complete the process.

