



Step-by-Step Guide to Configuration

The **Connectit-MAS90 Configuration** utility enables you to check or change the various settings the **Connectit-MAS90** software uses when creating documents, customers and vendors in **Sage MAS**. To open the **Connectit-MAS90 Configuration** application, browse to the **Start | All Programs | Connectit-MAS90** menu and click the **Connectit-MAS90 Configuration** option.

General Note: The field names in the drop down lists in the Connectit-MAS90 Configuration utility are the original QuoteWerks field names and not the customised field names. To find the original QuoteWerks field name label, (the Default Label Name), go into QuoteWerks and double left click on the field name in question whilst holding down the Ctrl key.

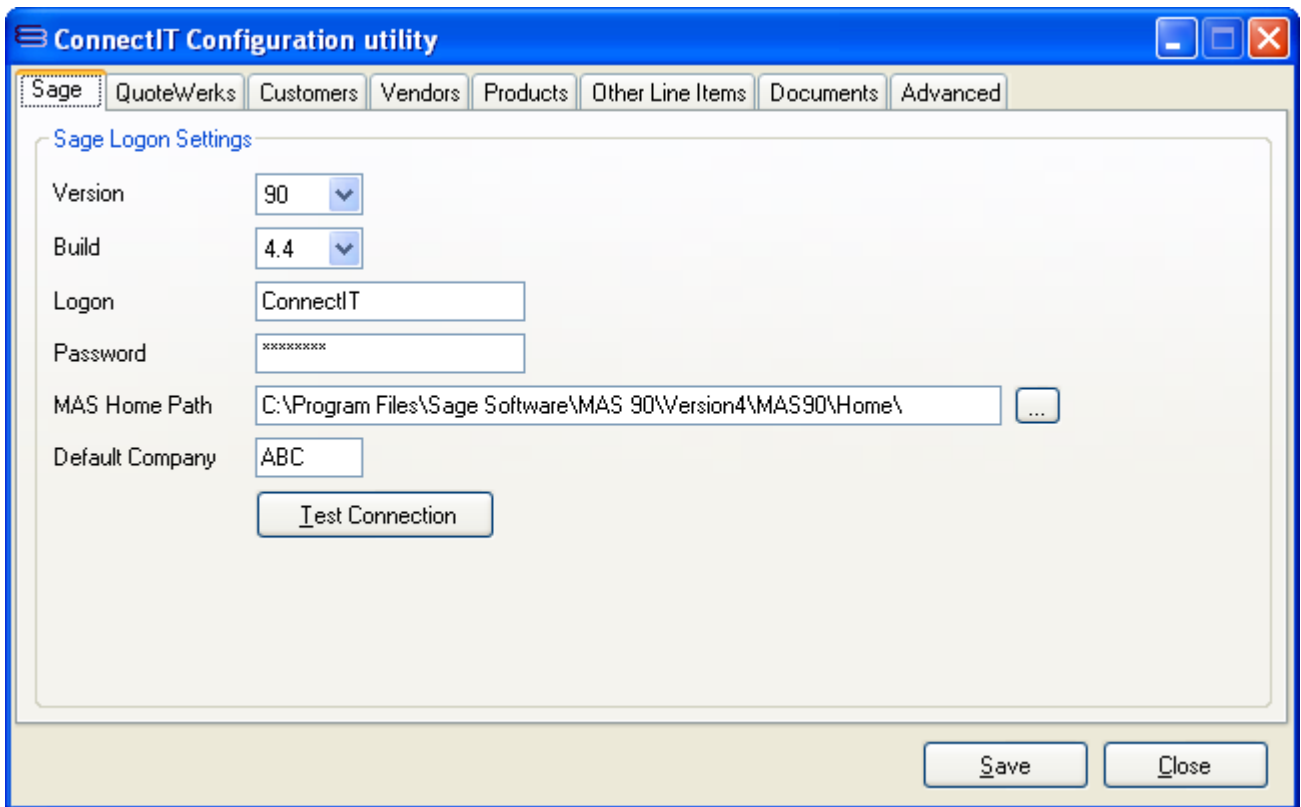


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Sage MAS Logon Settings

The **Sage** tab enables the connection to **Sage MAS** to be set up and tested.



The screenshot shows the 'ConnectIT Configuration utility' window with the 'Sage' tab selected. The 'Sage Logon Settings' section contains the following fields and controls:

- Version: 90 (dropdown)
- Build: 4.4 (dropdown)
- Logon: ConnectIT (text box)
- Password: ***** (password field)
- MAS Home Path: C:\Program Files\Sage Software\MAS 90\Version4\MAS90\Home\ (text box with browse button)
- Default Company: ABC (text box)
- Test Connection (button)
- Save (button)
- Close (button)

1. On the **Sage** tab, select the **Version** and **Build** of **Sage MAS** that you are running and then enter your **Logon**, and **Password**, as appropriate for your **Sage MAS** installation.
2. Select the **MAS Home Path** and enter the **Default Company** used.

Note: For Sage MAS 90, the default path for the Home directory file is C:\Program Files\Sage Software\MAS 90\Version4\MAS90\Home. This is where the Sage MAS PVXWin32.exe file resides – the OLE Server that provides an interface to ProvideX (Sage MAS) objects through COM.

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 **Sage** tab.

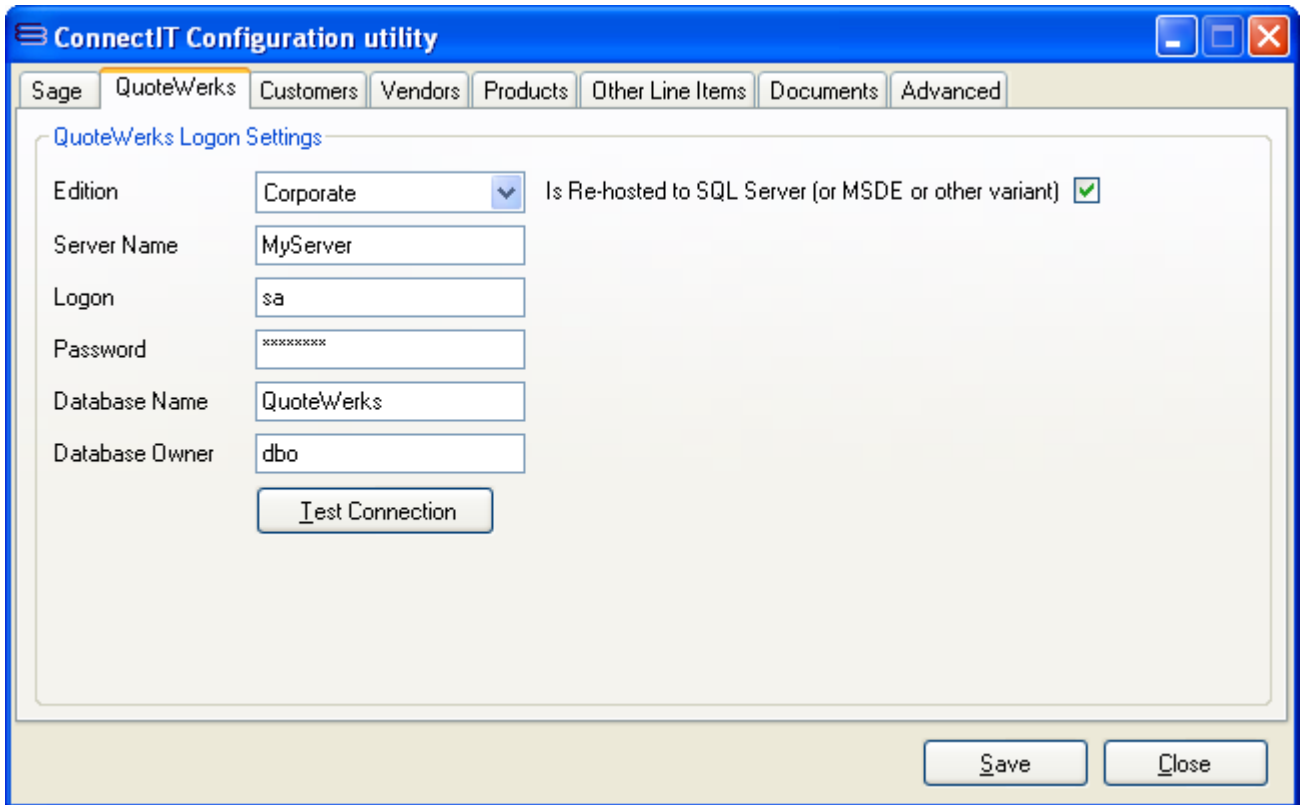


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QuoteWerks Settings

The **QuoteWerks** tab enables the connection to **QuoteWerks** to be set up and tested.



The screenshot shows the 'ConnectIT Configuration utility' window with the 'QuoteWerks' tab selected. The 'QuoteWerks Logon Settings' section contains the following fields and options:

- Edition:** Corporate (dropdown menu)
- Is Re-hosted to SQL Server (or MSDE or other variant):**
- Server Name:** MyServer
- Logon:** sa
- Password:** [Hidden with asterisks]
- Database Name:** QuoteWerks
- Database Owner:** dbo

At the bottom of the settings area is a 'Test Connection' button. At the bottom right of the window are 'Save' and 'Close' buttons.

1. On the **QuoteWerks** tab, select the **Edition** of **QuoteWerks** you are running.
2. If the **QuoteWerks Corporate** edition is selected, the **Is Re-hosted to SQL Server (or MSDE or other variant)** option box becomes enabled. If you are running the **QuoteWerks Corporate** edition which has been re-hosted, tick this option to allow the rest of the information to be populated.
3. If you are running **QuoteWerks** which has been re-hosted, enter the **Server Name**, **Logon**, **Password**, **Database Name** and **Database Owner** information. This can be found by looking in the **QuoteWerks Medic Utility** under the **Utilities | System Database Setup** menu option.

Note: the password value is hidden on the System Database Setup screen. You may need to ask your IT systems administrator or the person that originally re-hosted QuoteWerks for this information.

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 **QuoteWerks** tab.



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Customer Settings

The **Customers** tab offers options on how customer account information is matched and handled between **QuoteWerks** and **Sage MAS**.

The screenshot shows the 'ConnectIt Configuration utility' window with the 'Customers' tab selected. The 'Customer Settings' section includes the following options:

- Sage Customer Account Reference is in QuoteWerks Customer Account Field
- # characters to use in Customer 'n' character Find
- Use Sage MAS Customer Tax Schedule on Documents Use Sage MAS Customer Terms on Documents
- Do not transfer the current Document if:
 - the Customer Account is flagged as on 'Credit Hold'
 - the Customer's Current Balance exceeds Credit Limit including the value of Document to be transferred
 - the Customer's Open Orders exceeds Credit Limit including the value of Document to be transferred
- Update Status if transfer fails due to Credit Hold or Limit

Buttons for 'Save' and 'Close' are located at the bottom right.

1. If you have the **Sage Customer Account Reference** within the **QuoteWerks** document, tick the **Sage Customer Account Reference is in QuoteWerks** box. Ticking the **Sage Customer Account Reference is in QuoteWerks** box enables the **Account Reference field** drop down so that the appropriate field can be selected for where the **Sage Customer Account Reference** is held.

Note: If, when transferring a document from QuoteWerks to Sage MAS, the selected Account Reference field is blank or the account number detailed in the field cannot be found, the user will be prompted as to whether ConnectIt-MAS90 should perform searches on the Company Name in an attempt to find an account reference.

2. The **# characters to use in Customer 'n' character Find** defines how many characters from the start of the **QuoteWerks Company Name** that **ConnectIt-MAS90** will use in trying to find a match. Setting this value to the maximum 30 turns the 'n' character search off.

Note: for more details on how ConnectIt-MAS90 attempts to match the QuoteWerks Company Name to a Sage Account Reference, please refer to the ConnectIt-MAS90 online Knowledgebase.

3. The **Use Sage MAS Customer Tax Schedule** and **Terms Code on Documents** options determine whether the details set on the **QuoteWerks Document** are used, or whether they are taken from the **Customer** record in **Sage MAS**. To use the **Customer Tax Schedule** and/or **Terms Code** set on the **Customer** record in **Sage MAS**, ensure that the relevant option(s) is(are) ticked.
4. There are a number of **Do not transfer the current Document if** options. Ticking **The Customer Account is flagged as on 'Credit Hold'** prevents **QuoteWerks** documents from being transferred to **Sage MAS** if the Customer Account is set to **on Credit Hold** in **Sage MAS**.



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5. Ticking **The Customer's Current Balance exceeds Credit Limit** prevents **QuoteWerks** documents from being transferred to **Sage MAS** if the Customer's Credit Limit has already been exceeded in **Sage MAS**. Ticking the **including the value of document to be transferred** option will prevent documents from being transferred if transferring the current document would cause the customer's Credit Limit to be exceeded.
6. Ticking **The Customer's Open Orders exceed Credit Limit** prevents **QuoteWerks** documents from being transferred to **Sage MAS** if the Customer's Open Orders already exceed the Customer's Credit Limit in **Sage MAS**. Ticking the **including the value of document to be transferred** option will prevent documents from being transferred if transferring the current document would cause the Customer's Open Orders to exceed their Credit Limit.
7. If you would like the status of the **QuoteWerks** document to be changed to reflect the fail of the transfer, tick the **Update Status if transfer fails due to Credit Hold or Limit** and then enter the required status for the **QuoteWerks** document into the **Revised Document Status** box.
8. Click the **Save** button to retain the settings on the **Customers** tab.

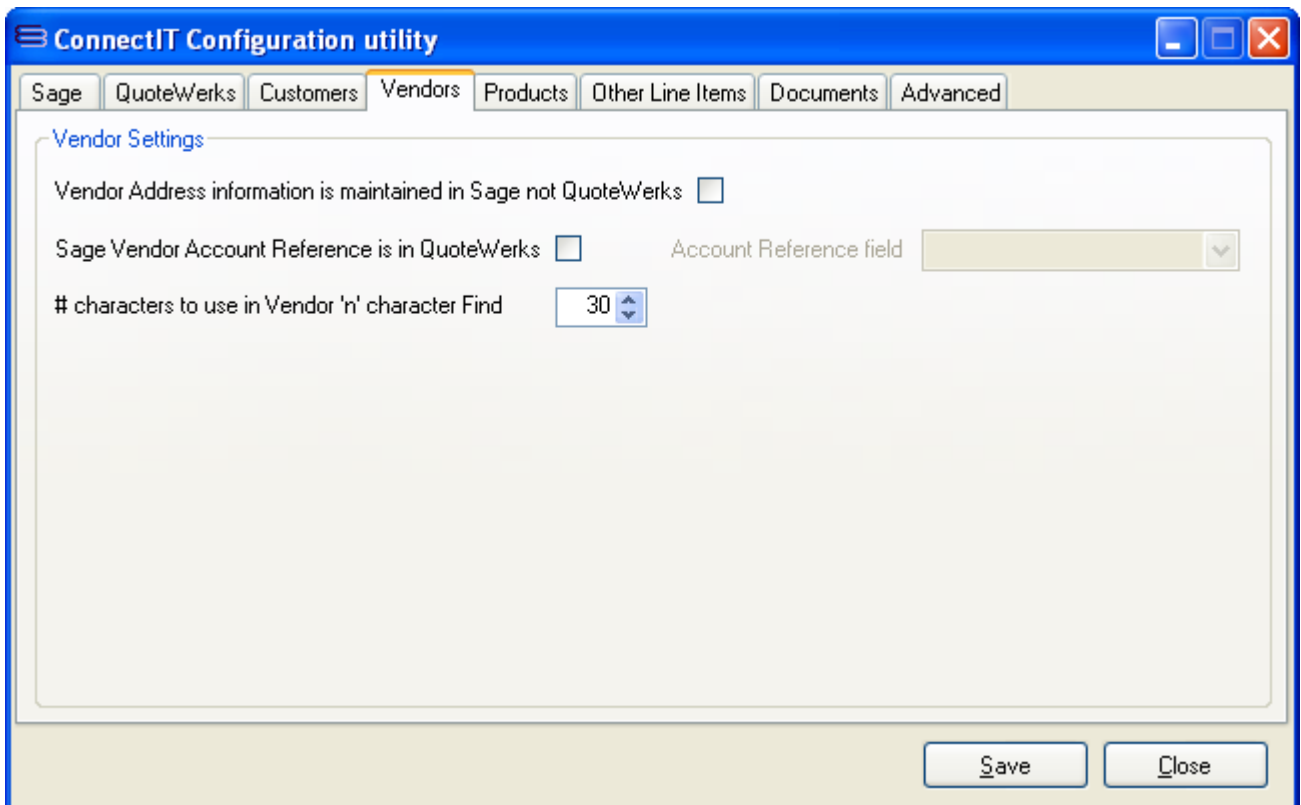


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Vendors Settings

The **Vendors** tab offers options on how vendor account information is matched and handled between **QuoteWerks** and **Sage MAS**.



The screenshot shows the 'ConnectIT Configuration utility' window with the 'Vendors' tab selected. The window has a blue title bar and standard Windows window controls. Below the title bar are tabs for 'Sage', 'QuoteWerks', 'Customers', 'Vendors', 'Products', 'Other Line Items', 'Documents', and 'Advanced'. The 'Vendors' tab is active, showing the 'Vendor Settings' section. This section contains three main settings: 1. 'Vendor Address information is maintained in Sage not QuoteWerks' with an unchecked checkbox. 2. 'Sage Vendor Account Reference is in QuoteWerks' with an unchecked checkbox, followed by an 'Account Reference field' dropdown menu. 3. '# characters to use in Vendor 'n' character Find' with a spin box set to '30'. At the bottom right of the window are 'Save' and 'Close' buttons.

1. By default, **ConnectIt-MAS90** understands the Vendor address information to be stored and maintained in **QuoteWerks**. When creating P/O Purchase Order documents in **Sage MAS**, **ConnectIt-MAS90** will use the Vendor address information that is in the **QuoteWerks Vendors** database. If, however, your Vendor address information is stored and maintained in **Sage MAS**, tick the **Vendor Address information is maintained in Sage not QuoteWerks** option. **ConnectIt-MAS90** will then use the Vendor address information from **Sage MAS**.
2. If you have the **Sage Vendor Account Reference** within the **QuoteWerks Vendor** information, tick the **Sage Vendor Account Reference is in QuoteWerks** box. Ticking the **Sage Vendor Account Reference is in QuoteWerks** box enables the **Account Reference field** drop down; select the appropriate custom field where the **Sage Vendor Account Reference** is held.

Note: if, when transferring a document from QuoteWerks to Sage MAS, the selected Account Reference field is blank or the account number detailed in the field cannot be found, the user will be prompted as to whether ConnectIt-MAS90 should perform searches on the Company Name in an attempt to find an account reference.

3. The **# characters to use in Vendor 'n' character Find** defines how many characters from the start of the **QuoteWerks Company Name** that **ConnectIt-MAS90** will use in trying to find an a match. Setting this value to the maximum 30 turns the 'n' character search off.

Note: for more details on how ConnectIt-MAS90 attempts to match the QuoteWerks Company Name to a Sage MAS Account Reference, please refer to the ConnectIt-MAS90 online Knowledgebase.

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



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Product Settings (All Documents tab)

The **Products | All Documents** tab enables codes to be defined for products that do not already exist in **Sage MAS** so that the user does not have to create every product in **Sage MAS** before documents can be transferred from **QuoteWerks** to **Sage MAS**.

The screenshot shows the 'ConnectIt Configuration utility' window. The 'Products' tab is selected, and the 'All Documents' sub-tab is active. The settings are as follows:

- Remove Spaces from Product Code:
- Vendor Name field: Description (dropdown)
- Automatically create Products if they do not exist in MAS:
- Use Cost Price from QuoteWerks:
- Use Selling Price from QuoteWerks:
- Product Line field: (dropdown)
- Product Type field: (dropdown)
- Allow Documents to be created if Product Code not in MAS:
- Code for taxable products: (text input)
- Code for non-taxable products: (text input)

1. If you would like **ConnectIt-MAS90** to remove any spaces from the Product Code(s) on the QuoteWerks document before the document is created in **Sage MAS**, tick the **Remove Spaces from Product Code** tick box.
2. By default, **ConnectIt-MAS90** uses the **Vendor** field in **QuoteWerks** to match with the Vendor Name in **Sage MAS**. If you would prefer **ConnectIt-MAS90** to use a different field in **QuoteWerks**, click the drop down list box to select an alternative.
3. If upon Document Transfer you would like **ConnectIt-MAS90** to automatically create products if they do not already exist in **Sage MAS**, tick the **Automatically create Products if they do not exist in MAS** tick box.
4. If you have ticked **Automatically create Products if they do not exist in MAS**, tick if you would also like to **Use Cost Price from QuoteWerks** and/or **Use Selling Price from QuoteWerks**.
5. If you have ticked **Automatically create Products if they do not exist in MAS**, and you have the **Product Line** and/or **Product Type** information in QuoteWerks, then select the field where this information is held from each respective dropdown list.

Note: Products are created with minimal details only – Product Code, Description, Cost and Selling Price (as read from the QuoteWerks document) and Product Line (if set on the Products | Wizard tab). Products are enabled for the S/O, P/O and B/M modules. All other details may be updated at a later stage in Sage MAS.

Note: When used in conjunction with the 'Remove Spaces' configuration option, ConnectIt-MAS90 will first search for a Product Code as it appears in QuoteWerks, and then without spaces. If the Product



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Code is still not found in Sage MAS, then the Product will be created without spaces in the Code in Sage MAS.

Note: When used, this option disables the option to use a default Product Code if a Product Code does not exist in Sage.

6. By default, the **Product Settings** on the **Products** tab do not allow documents to be created if the product code does not exist in **Sage MAS**. Tick the **Allow documents to be created even if the product code does not exist in Sage** tick box if you would like documents to be created even if the product code does not exist in **Sage MAS**.
7. If you have allowed documents to be created even if the product code does not exist in **Sage MAS**, enter the default product codes for Taxable and Non-taxable products that is to be allocated to products in **Sage MAS** if the product code does not already exist in **Sage MAS**.

Note: The resulting Sage MAS document will retain the product description from the QuoteWerks document for reference purposes.

8. Click the **Save** button to retain the settings on the **Products | All Documents** tab.

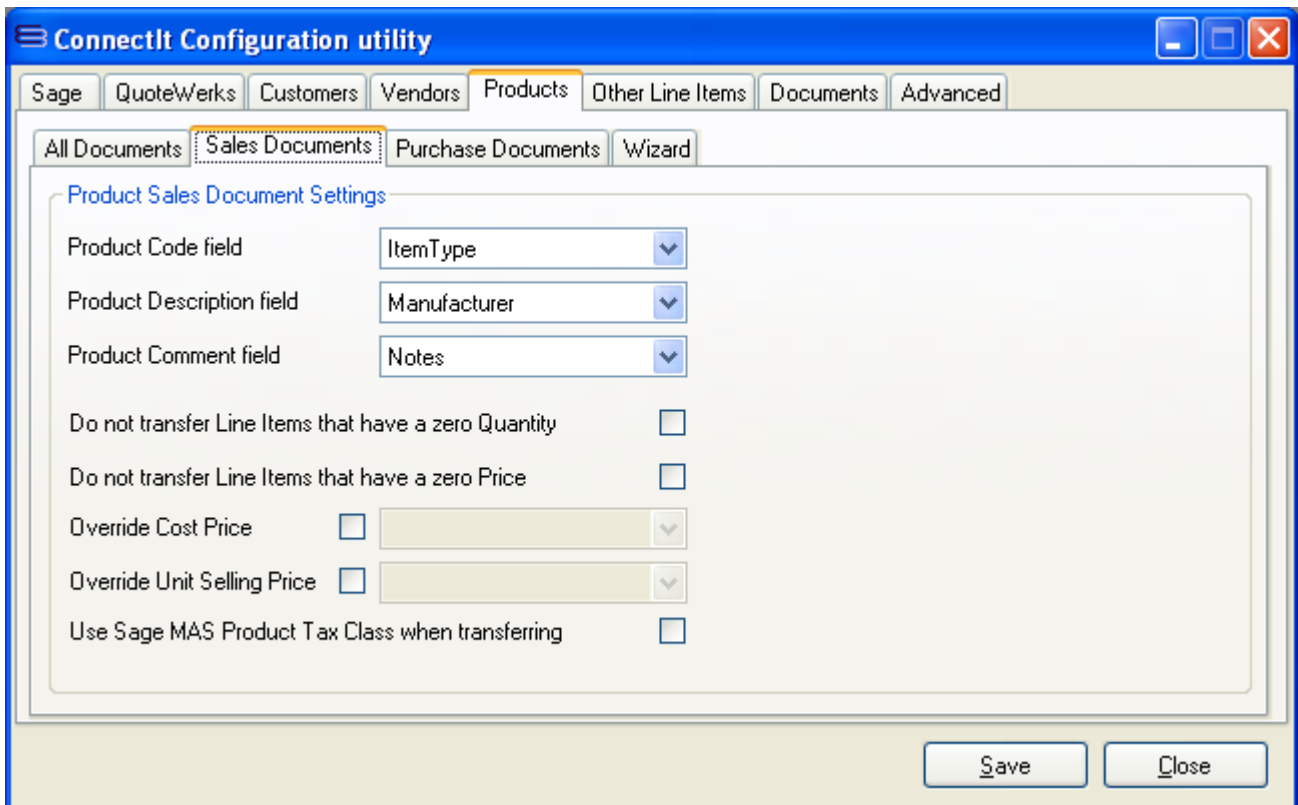


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Product Settings (Sales Documents tab)

The **Products | Sales Documents** tab enables which fields are used for product information as **A/R** and **S/O module** documents are transferred from **QuoteWerks** to **Sage MAS**.



1. By default, **ConnectIt-MAS90** uses the **Manufacturer Part Number** field in **QuoteWerks** to match with the product code in **Sage MAS** when creating Sales Documents. If you would prefer **ConnectIt-MAS90** to use a different field in **QuoteWerks**, click the drop down list box to select an alternative.
2. By default, **ConnectIt-MAS90** uses the **Description** field in **QuoteWerks** for the Description and Comment when creating Sales Documents. If you would prefer **ConnectIt-MAS90** to use a different field(s) in **QuoteWerks**, click the drop down list box to select an alternative.
3. By default, **ConnectIt-MAS90** transfers all **Product/Service** lines from **QuoteWerks** into **Sage MAS**. If you would prefer Line Items that have a zero Quantity or Price to not be transferred when creating Sales Documents, tick the relevant box.
4. By default, **ConnectIt-MAS90** uses the cost prices set in the **QuoteWerks Document** being transferred. To use cost prices from **Sage MAS**, tick the **Override Cost Price** option. This will enable the **Override Cost Price** drop down list box where the **Standard, Average or Last Unit Cost** can be chosen to be used.
5. By default, **ConnectIt-MAS90** uses the selling prices set in the **QuoteWerks Document** being transferred. To use selling prices from **Sage MAS**, tick the **Override Unit Selling Price** option. This will enable the **Override Unit Selling Price** drop down list box where the **Standard Unit or Suggested Retail Price** can be chosen to be used.

Note: Overriding the QuoteWerks Selling Price with that in Sage MAS will also override whether the Product/Service is flagged as taxable on the Sage MAS document.

Note: The Sage MAS Selling Price and taxable flags are not brought back into QuoteWerks; this may mean differences between the QuoteWerks and Sage MAS document totals.

6. If you would like to use the **Tax Class** that is set up on the Product **I/M Item** in **Sage MAS** instead of the Tax Code Yes/No in QuoteWerks, tick **Use Sage MAS Product Tax Class when transferring** option.
7. Click the **Save** button to retain the settings on the **Products | Sales Documents** tab.



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Product Settings (Purchase Documents tab)

The **Products | Purchase Documents** tab enables which fields are used for product information as **P/O module** documents are transferred from **QuoteWerks** to **Sage MAS**.

ConnectIt Configuration utility

Sage QuoteWerks Customers Vendors Products Other Line Items Documents Advanced

All Documents Sales Documents Purchase Documents Wizard

Product Purchase Document Settings

Product Code field Manufacturer

Product Description field Notes

Product Comment field Vendor

Do not transfer Line Items that have a zero Quantity

Do not transfer Line Items that have a zero Price

Override Cost Price StandardUnitCost

Use Sage MAS Product Tax Class when transferring

Save Close

1. By default, **ConnectIt-MAS90** uses the **Manufacturer Part Number** field in **QuoteWerks** to match with the product code in **Sage MAS** when creating Purchase Documents. If you would prefer **ConnectIt-MAS90** to use a different field in **QuoteWerks**, click the drop down list box to select an alternative.
2. By default, **ConnectIt-MAS90** uses the **Description** field in **QuoteWerks** for the Description and Comment when creating Purchase Documents. If you would prefer **ConnectIt-MAS90** to use a different field(s) in **QuoteWerks**, click the drop down list box to select an alternative.
3. By default, **ConnectIt-MAS90** transfers all **Product/Service** lines from **QuoteWerks** into **Sage MAS**. If you would prefer Line Items that have a zero Quantity or Price to not be transferred when creating Purchase Documents, tick the relevant box.
4. By default, **ConnectIt-MAS90** uses the cost prices set in the **QuoteWerks Document** being transferred. To use cost prices from **Sage MAS**, tick the **Override Cost Price** option. This will enable the **Override Cost Price** drop down list box where the **Standard, Average or Last Unit Cost** can be chosen to be used.

Note: Overriding the QuoteWerks Cost Price with that in Sage MAS will also override whether the Product/Service is flagged as taxable on the Sage MAS document.

Note: The Sage MAS Cost Price and taxable flags are not brought back into QuoteWerks; this may mean differences between the QuoteWerks and Sage MAS document totals.

5. If you would like to use the **Tax Class** that is set up on the Product **I/M Item** in **Sage MAS** instead of the Tax Code Yes/No in QuoteWerks, then tick the **Use Sage MAS Tax Class when transferring** option.
6. Click the **Save** button to retain the settings on the **Products | Purchase Documents** tab.

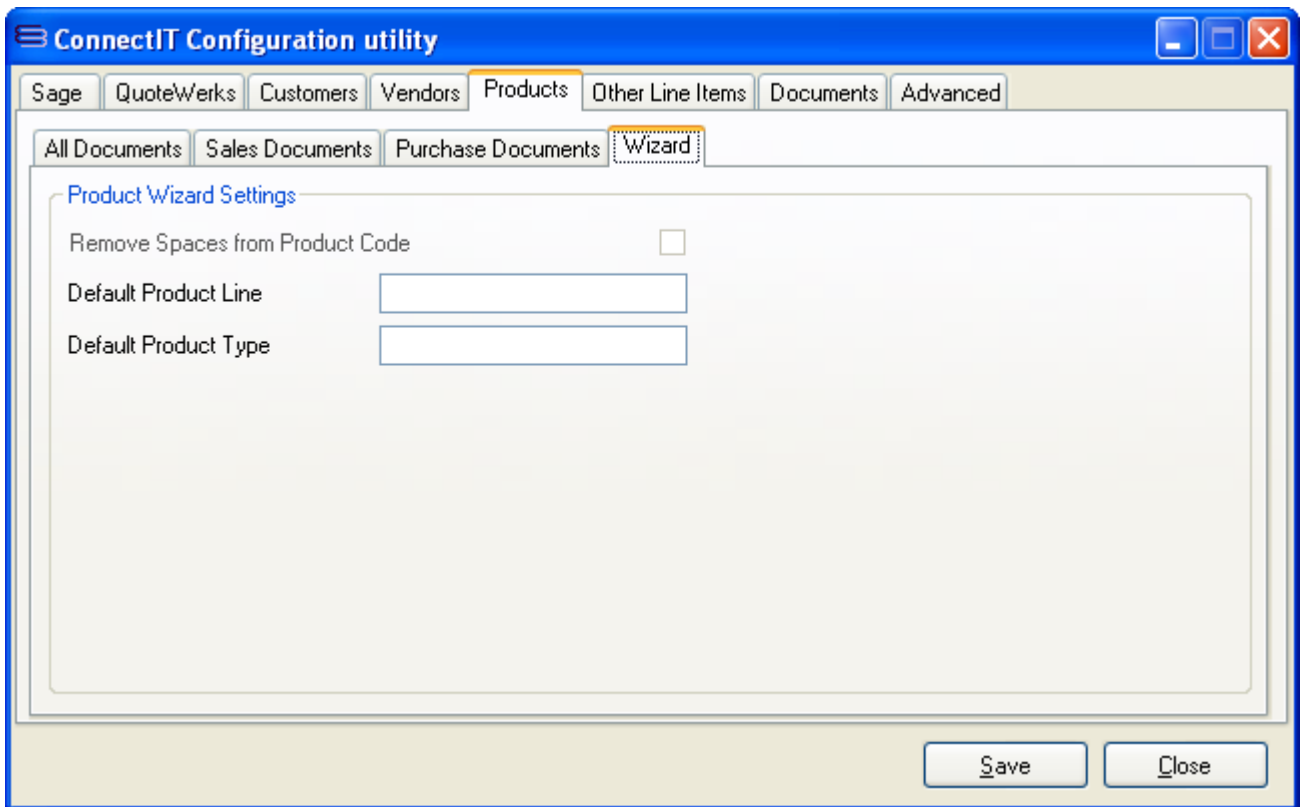


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Product Settings (Wizard tab)

The **Products | Wizard** tab enables values to be entered that are automatically populated when creating **QuoteWerks** products in **Sage MAS**.



The screenshot shows the 'ConnectIT Configuration utility' window. The 'Products' tab is selected, and the 'Wizard' sub-tab is active. The 'Product Wizard Settings' section contains the following options:

- Remove Spaces from Product Code:** An unchecked checkbox.
- Default Product Line:** An empty text input field.
- Default Product Type:** An empty text input field.

At the bottom right of the window are 'Save' and 'Close' buttons.

1. If you would like **ConnectIt-MAS90** to remove any spaces from the Product Code(s) on the QuoteWerks document before the Create Product Wizard creates the product in **Sage MAS**, tick the **Remove Spaces from Product Code** tick box.
2. If you would like the **ConnectIt-MAS90 Create Product Wizard** to set a **Default Product Line** when products are created in **Sage MAS**, enter the required default product line in the appropriate field. As the Product Line is a required field, this will save the user clicking into the Wizard to set this value.

Note: Just the Product Line Code should be entered as ConnectIt-MAS90 will then find that Code to match to.

3. If you would like the **ConnectIt-MAS90 Create Product Wizard** to set a **Default Product Type** when products are created in **Sage MAS**, enter the required default product type in the appropriate field. As the Product Type is a required field, this will save the user clicking into the Wizard to set this value.

Note: Options are hard-coded in Sage MAS (and ConnectIt) to Finished Good, Raw Material, Discontinued and Kit.

4. Click the **Save** button to retain the settings on the **Products | Wizard** tab.



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Advanced Settings (Discount & Charge Line Items tab)

The **Other** tab displays the configuration of how **QuoteWerks** taxable and non-taxable **Percent Discount** and **Percent Charge Line Items** are transferred to **Sage MAS**.

By default, taxable **Percent Discount** and **Percent Charge Line Items** are summarised in the **S/O module** document **Discount Amount** field. Non-taxable **Percent Discount** and **Percent Charge Line Items** are added to the Sage MAS document using the **Miscellaneous Product Code "M"** and **Sales Account "400010000"**.

ConnectIT Configuration utility

Sage QuoteWerks Customers Vendors Products **Other Line Items** Documents Advanced

Discount Line Items

Use Sage MAS Discount Amount field to summarize taxable Percent Discount Line Items

Code for taxable items: /M Sales Account: 400010000 Purchase Account: 400010000

Code for non-taxable items: /M Sales Account: 400010000 Purchase Account: 400010000

Charge Line Items

Use Sage MAS Discount Amount field to summarize taxable Percent Charge Line Items

Code for taxable items: /M Sales Account: 400010000 Purchase Account: 400010000

Code for non-taxable items: /M Sales Account: 400010000 Purchase Account: 400010000

Save Close

1. By default, the taxable **Percent Discount Line Items** for **S/O module** documents are summarised in the document **Discount Amount** field. If you would like documents to be created as individual Line Items, un-tick the **Use Sage MAS Document Amount field to summarize taxable Percent Discount Line Items** box.
2. By default, the taxable **Percent Charge Line Items** for **S/O module** documents are summarised in the document **Discount Amount** field. If you would like documents to be created as individual Line Items, un-tick the **Use Sage MAS Document Amount field to summarize taxable Percent Charge Line Items** box.
3. When not summarizing the **Percent Discount** and **Percent Charge Line Items** in the **Discount Amount** field, the **Product Code**, **Sales Account** and **Purchase Account** fields will be enabled allowing you to enter the appropriate details. The **Product Code** may be any value from the **I/M Items** or **C/I Miscellaneous Items** lists; the **Account Codes** should be entered in "000000000" format.
4. Click the **Save** button to retain the settings on the **Other Line Items** tab.

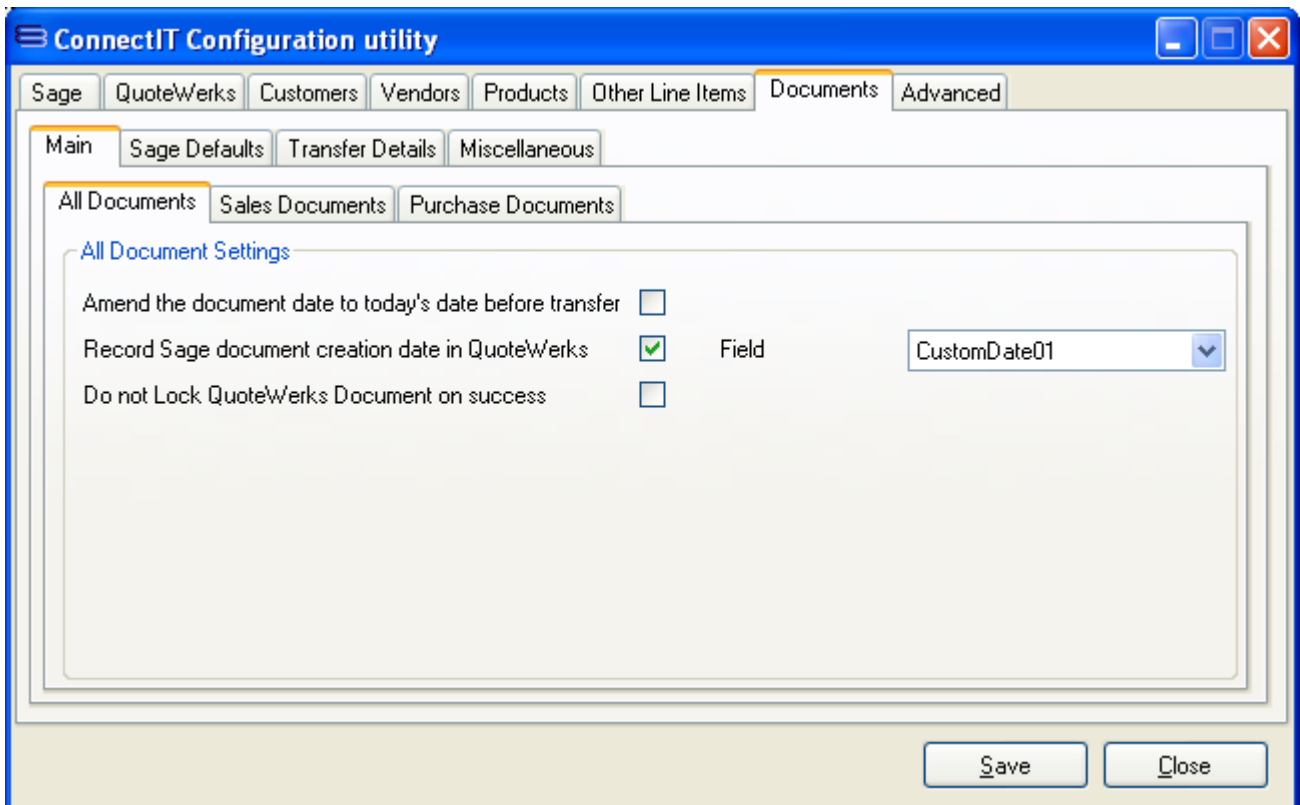


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Document Settings (Main | All Documents tab)

The **Documents | Main | All Documents** tab offers options on how document information is handled between **QuoteWerks** and **Sage MAS**.



1. If you want **ConnectIt-MAS90** to update the **QuoteWerks** document date to the transfer date, ensure that the **Amend the document date to today's date before transfer** box is ticked. **ConnectIt-MAS90** will update the **QuoteWerks** document **Sales Info** tab **Date** field to the current system date before transferring the information from **QuoteWerks** to **Sage MAS**. This will result in both the **QuoteWerks** document and the **Sage MAS** document showing the current date when the transfer has completed successfully.
2. If you want to store the date that the **QuoteWerks** document was created in **Sage MAS**, ensure that the **Record Sage document creation date in QuoteWerks** box is ticked. Then select from the drop down list the custom field in **QuoteWerks** that you would like the date the document was created in **Sage MAS** to be stored in. Alternatively, if after transferring the **QuoteWerks** document information to **Sage MAS**, you do not wish the **Sage Document Date** to be stored, un-tick the **Record Sage document creation date in QuoteWerks** tick box.
3. By default, **ConnectIt-MAS90** will 'Lock' the **QuoteWerks** document when the information is successfully transferred. If you do not want **ConnectIt-MAS90** to lock the **QuoteWerks** document on successful transfer, then tick the **Do not Lock QuoteWerks Document on success** option.
4. Click the **Save** button to retain the settings on the **Document Settings | Main | All Documents** tab.



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Document Settings (Main | Sales Documents tab)

The **Documents | Main | Sales Documents** tab provides options on how document information is handled between **QuoteWerks** and **Sage MAS**.

The screenshot shows the 'ConnectIT Configuration utility' window. The 'Documents' tab is selected, and the 'Sales Documents' sub-tab is active. The 'Sales Document Settings' section contains the following options:

- Use QuoteWerks Document Number for MAS Document: Includes a 'Number Increment' text box with the value '0'.
- Transfer Sage document number back to QuoteWerks: Includes a 'Field' dropdown menu currently set to 'CustomText01'.
- Transfer Document Header Value as first line Comment: Includes a 'Field' dropdown menu.
- Transfer Comment Lines on Sales Documents: Includes a 'Misc. Item Code' text box with the value '/C'.

Buttons for 'Save' and 'Close' are located at the bottom right of the window.

1. If you want **ConnectIt-MAS90** to use the **QuoteWerks** Document Number when creating the **Sage MAS** Sales Document Number, tick the **Use QuoteWerks Document Number for MAS Document** tick box. When ticked, an incremental value can also be applied in order to avoid conflicting Document Numbers from historic **Sage MAS** Documents. If the **QuoteWerks** Document Number is 1000 and if 100000 is entered as the **Number Increment**, the **Sage MAS** document number will be 101000.
2. If you want to retrieve the **Sage MAS Document Number** back into **QuoteWerks**, ensure that the **Transfer Sage Document Number back to QuoteWerks** box is ticked. Alternatively, if after transferring the **QuoteWerks** document information to **Sage MAS**, you do not wish the **Sage Document Number** to be transferred back to **QuoteWerks**, un-tick the **Transfer Sage Document Number back to QuoteWerks** tick box.
3. By default, the **Sage MAS Sales Document Number** will be transferred back into **QuoteWerks'** **CustomText01** field. If you would prefer this to be transferred back into a different field, click the drop down list to select your preferred choice of the custom fields.
4. If you want to allow a **QuoteWerks Document Header** field value to be transferred to the **Sage MAS** Sales Document as the first line on the Document in **Sage MAS**, tick the **Transfer Document Header Value as first line Comment** tick box. If this option is ticked, then the **QuoteWerks** field and **Sage MAS** Item Code can also be set.
5. If you want **ConnectIt-MAS90** to transfer Comment lines from the **QuoteWerks** document, ensure that the **Transfer Comment Lines to Sales Documents** is ticked.
6. Click the **Save** button to retain the settings on the **Document Settings | Main | Sales Documents** tab.



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Document Settings (Main | Purchase Documents tab)

The **Documents | Main | Purchase Documents** tab provides options on how document information is handled between **QuoteWerks** and **Sage MAS**.

The screenshot shows the 'ConnectIT Configuration utility' window. The 'Documents' tab is selected, and within it, the 'Purchase Documents' sub-tab is active. The 'Purchase Document Settings' section contains the following options:

- Use QuoteWerks Document Number for MAS Document: Includes a 'Number Increment' text box with the value '0'.
- Transfer Sage document number back to QuoteWerks: Includes a 'Field' dropdown menu currently set to 'CustomText01'.
- Transfer Document Header Value as first line Comment: Includes a 'Field' dropdown menu.
- Transfer Comment Lines on Purchase Documents
- Allow creation from multi-Vendor QuoteWerks documents
- Allow user to select which Vendors to create POs for
- Check all Vendors exist in MAS irrespective of selection

At the bottom right of the window are 'Save' and 'Close' buttons. The 'Misc. Item Code' field is set to '/C'.

1. If you want **ConnectIt-MAS90** to use the **QuoteWerks** Document Number when creating the **Sage MAS** Purchase Document Number, tick the **Use QuoteWerks Document Number for MAS Document** tick box. When ticked, an incremental value can also be applied in order to avoid conflicting Document Numbers from historic **Sage MAS** Documents. If the **QuoteWerks** Document Number is 1000 and if 100000 is entered as the **Number Increment**, the **Sage MAS** document numbers will be 101000A, 101000B, 101000C etc if this setting is being used in conjunction with the existing **Allow creation of Purchase Orders in Sage from multi-Vendor QuoteWerks documents**.
2. If you want to retrieve the **Sage MAS Document Number** back into **QuoteWerks**, ensure that the **Transfer Sage Document Number back to QuoteWerks** box is ticked. Alternatively, if after transferring the **QuoteWerks** document information to **Sage MAS**, you do not wish the **Sage Document Number** to be transferred back to **QuoteWerks**, un-tick the **Transfer Sage Document Number back to QuoteWerks** tick box.
3. By default, the **Sage MAS Purchase Document Number** will be transferred back into **QuoteWerks'** **CustomText01** field. If you would prefer this to be transferred back into different field(s), click the drop down list to select your preferred choice of the custom fields.
4. If you want to allow a **QuoteWerks Document Header** field value to be transferred to the **Sage MAS** Purchase Document as the first line on the Document in **Sage MAS**, tick the **Transfer Document Header Value as first line Comment** tick box. If this option is ticked, then the **QuoteWerks** field and **Sage MAS** Item Code can also be set.
5. If you want **ConnectIt-MAS90** to transfer Comment lines from the **QuoteWerks** document, ensure that the **Transfer Comment Lines to Purchase Documents** is ticked.



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6. If you want to allow **ConnectIt-MAS90** to create multiple **Purchase Orders** when there is more than one **Vendor** listed against **Products** on the **QuoteWerks** document, ensure that the **Allow creation of Purchase Orders in Sage from multi-Vendor QuoteWerks documents** box is ticked. Alternatively, if you would prefer **ConnectIt** not to create **Sage** documents from **QuoteWerks** documents with multiple **Vendors** listed, un-tick this box.
7. If you want to be able to select which vendors Purchase Orders are created for, tick the option **Allow user to select which Vendors to create POs for**.
8. If you want to check that all vendors on the **QuoteWerks** document exist in **Sage MAS**, even if you are not creating Purchase Orders for them in **Sage MAS**, tick the option **Check all Vendors exist in MAS irrespective of selection** as this will ensure that users have entered the Vendor Names correctly on the QuoteWerks Document.
9. Click the **Save** button to retain the settings on the **Document Settings | Main | Purchase Documents** tab.

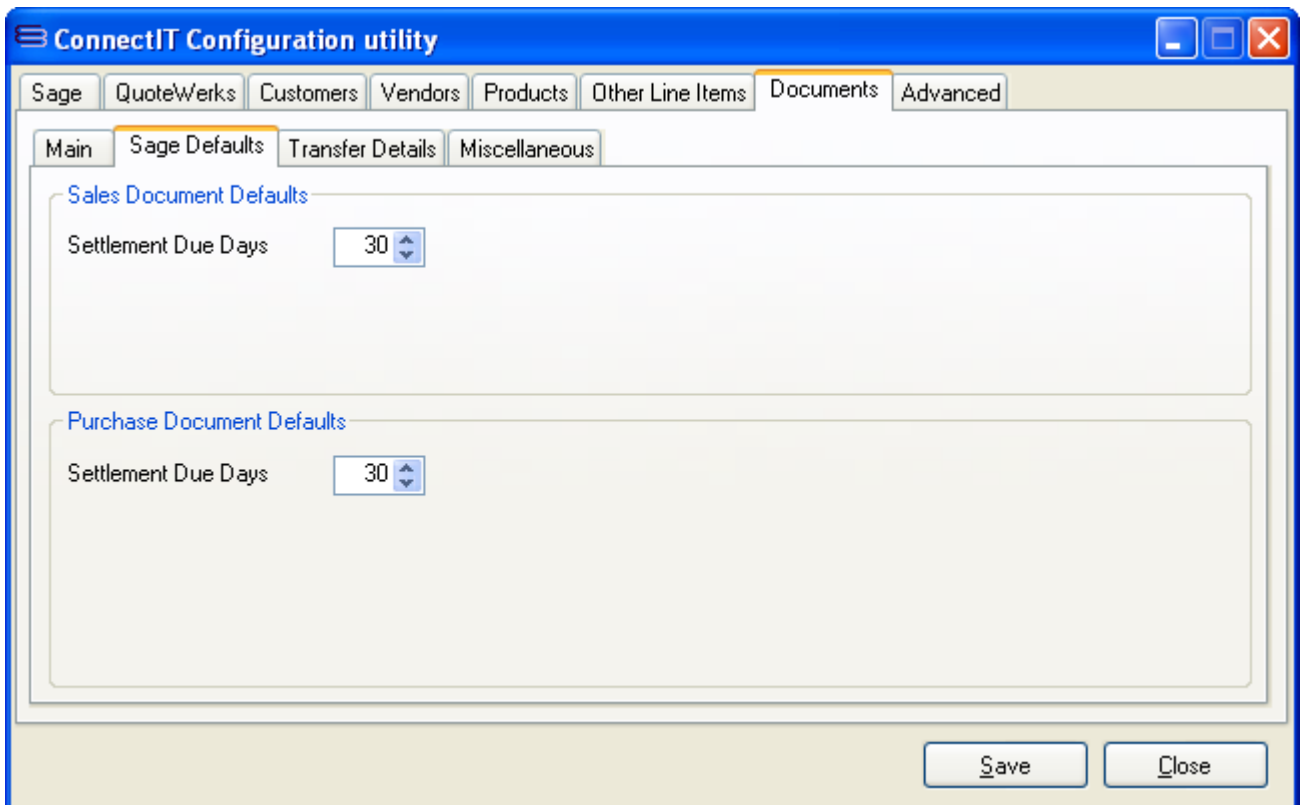


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Document Settings (Sage Defaults tab)

The **Documents | Sage Defaults** tab provides options to force default values into the **Sage MAS** document fields.



1. The **Settlement Due Days** field allows you to change the associated default value assigned to documents when they are created in **Sage MAS**.
2. Click the **Save** button to retain the settings on the **Document Settings | Sage Defaults** tab.



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Document Settings (Transfer Details tab)

The **Documents | Transfer Details** tab offers options on the combinations of **QuoteWerks** document **Types** and **QuoteWerks Start Status** to define which **Sage MAS** document type(s) are created.

	QW Doc Type	QW Starting Status	QW Ending Status	Sage Doc Type	+/-
▶	QUOTE	Maintenance - Open	Maintenance Quote Creat...	S/O Quote	<input type="checkbox"/>
	QUOTE	Quote Ready for Sage	Quote Ready for Sage	S/O Quote	<input type="checkbox"/>
	QUOTE	Service - Open	Service Quote Created in ...	S/O Invoice	<input type="checkbox"/>
	INVOICE	Credit Note Ready for S...	Credit Note Created in Sage	S/O Credit Memo	<input checked="" type="checkbox"/>
*					<input type="checkbox"/>

Buttons: Save, Close

1. The **QW Doc Type** column enables the user to select which **QuoteWerks** document type(s) can be created in **Sage MAS**. To configure the document type(s) you wish to create in **Sage MAS**, select the document type from the drop down list in the **QW Doc Type** column, i.e. **QUOTE**, **ORDER** or **INVOICE**.
2. The **QW Starting Status** column is used during the validation process to ensure that documents can only be created in **Sage MAS** if they are of a certain status in **QuoteWerks**, i.e. by default a **QUOTE** must have a status of **Quote Ready for Sage** in **QuoteWerks** before it can be created in **Sage MAS**.
3. The **QW Ending Status** column shows the status of the document in **QuoteWerks** after the information has been transferred to **Sage MAS**, i.e. by default a **QUOTE** has its **Status** changed to **Quote Created in Sage**.
4. The **Sage Doc Type** column enables the user to select the type of document that is to be created in **Sage MAS** from the **QuoteWerks** document. The document type, i.e. **S/O Quote**, **S/O Sales Order**, etc can be selected from the drop down list box.
5. The **+/-** column enables the user to specify whether negative values are being used in **QuoteWerks**. If the box is ticked, **ConnectIt-MAS90** will change the sign in the corresponding document from plus to minus, or from minus to plus. If the box is not ticked, **ConnectIt-MAS90** will not change the sign.

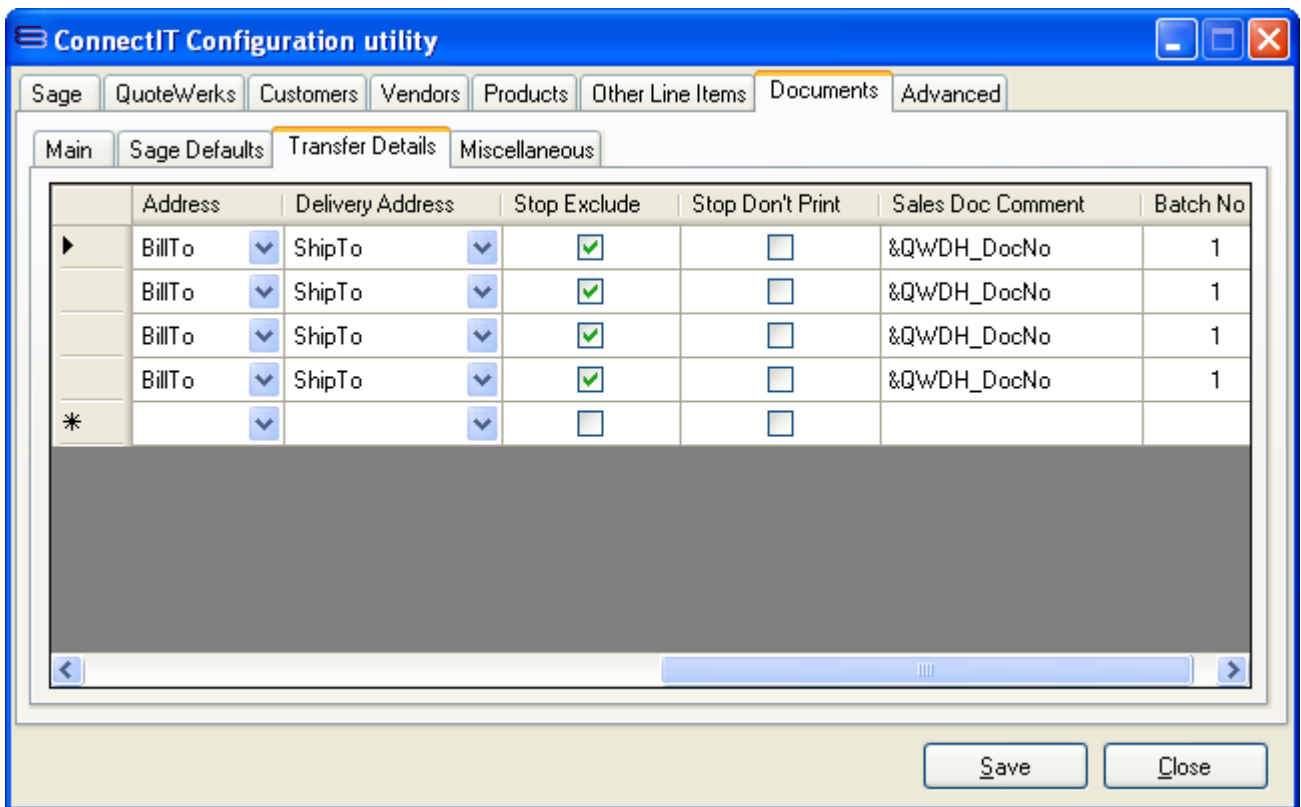
Note: It is necessary to have the correct **+/-** sign in the Change column because **Credit Notes** are generally created in different ways in **QuoteWerks** and in **Sage MAS** – the document values are negative in **QuoteWerks** but positive in **Sage MAS**. To ensure that the sales reporting is accurate in **QuoteWerks**, **Credit Notes** must be created as invoices with negative values.

It is necessary therefore as part of the **ConnectIt-MAS90** Configuration to check that the sign for each document type is correct and to change it if necessary to ensure that all documents are created correctly in **Sage MAS**.



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6. The **Active** column enables the user to activate and deactivate the document types that can and cannot be created in **Sage MAS**. If you require the ability to create a certain document type, ensure that there is a tick in the appropriate box in the **Active** column for that particular document type. To prevent certain document types being created, click the tick box to deactivate it so that the box is not ticked.
7. The **Address** and **Delivery Address** columns enable the user to specify which of the **QuoteWerks Sold To, Ship To, Bill To** address fields are used when transferring the information into **Sage MAS**. The **Address** column transfers to the **Sage MAS Bill To Address** on the **Address** tab of a **Sage MAS** document and the **Delivery Address** transfers to the **Sage Ship To Address**. Alternatively the “**From Sage**” option may be selected from the dropdown so that **ConnectIt** will use the address information from **Sage** and just use the **Customer Name** from **QuoteWerks** to match to an account in **Sage MAS**.
8. Ticking the **Stop Exclude** column enables the user to prevent **Exclude Line** types from the **QuoteWerks** document being transferred across to the **Sage MAS** document.
9. Ticking the **Stop Don't Print** column enables the user to prevent **Don't Print Line** types from the **QuoteWerks** document being transferred across to the **Sage MAS** document.

Note: caution should be used with this setting as **Don't Print Line Types** may have a cost or price associated with them. This could result in differences between the total document value of the **QuoteWerks** and **Sage MAS** documents.

Note: if the associated **Stop** flag is set, then a line item will not be transferred if it is an **Exclude** or **Don't Print** type; the precedence is such that **ConnectIt-MAS90** does not to transfer the line.

10. The **Sales Doc Comment** field relates to the information that **ConnectIt-MAS90** will transfer into the **Sage MAS** document **Comment** field. By default, this is the **QuoteWerks Document Number**. **ConnectIt-MAS90** supports a number of macros to allow configuration to transfer a number of different field values across from **QuoteWerks**; for full details of the macros available please see the **ConnectIt Knowledgebase** article 90.
11. Click the **Save** button to retain the settings on the **Document Settings | Transfer Details** tab.

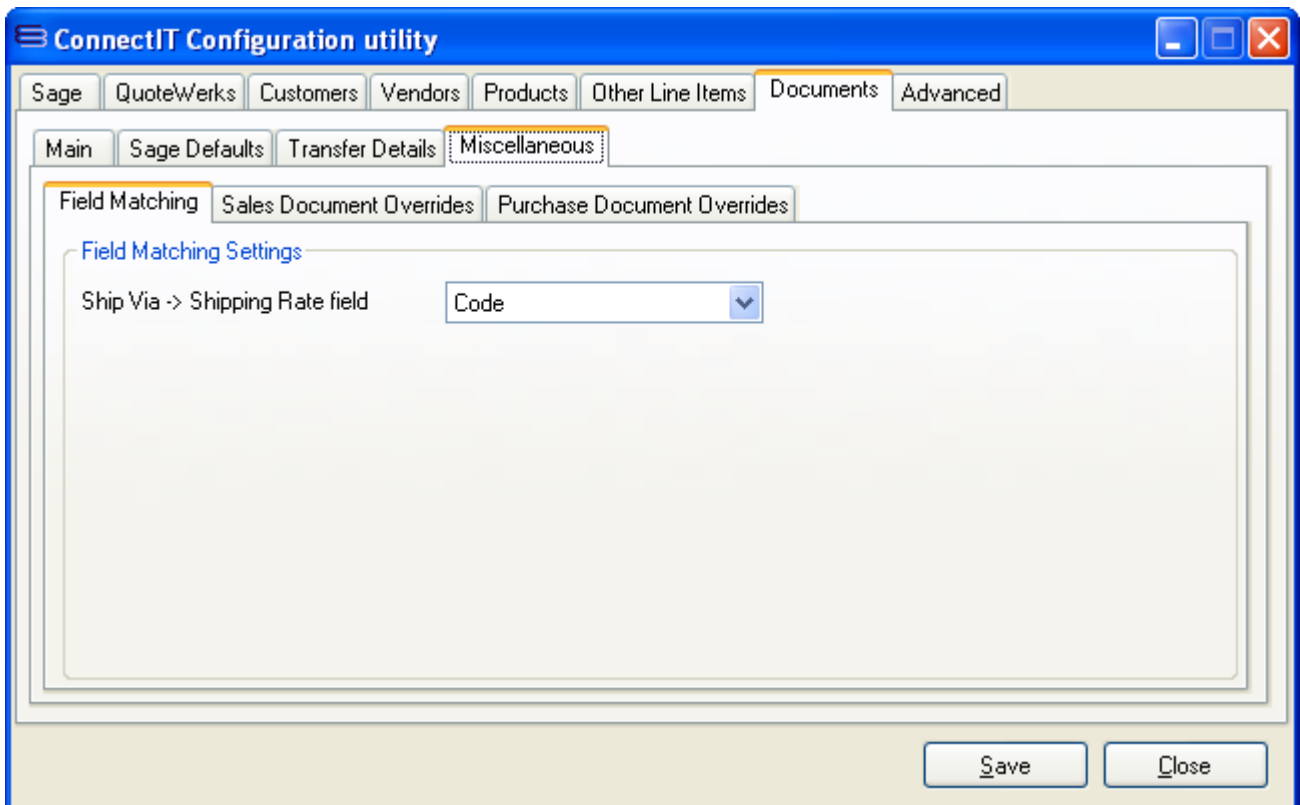


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Document Settings (Miscellaneous | Field Matching tab)

The **Documents | Miscellaneous | Field Matching** tab offers options on which fields are used to associate information on the **QuoteWerks** document to records in **Sage MAS**.



1. The **Ship Via -> Shipping Rate** field allows you to select which **Sage MAS Shipping Rate** field is used to match to the **Ship Via** value on the **QuoteWerks** document.
2. Click the **Save** button to retain the settings on the **Document Settings | Miscellaneous | Field Matching** tab.



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Document Settings (Miscellaneous | Sales Document Overrides | Header Fields tab)

The **Documents | Miscellaneous | Sales Document Overrides | Header Fields** tab enables you to override the default ConnectIt field mappings with your own field mapping requirements.

The screenshot shows the 'ConnectIT Configuration utility' window. The 'Documents' tab is selected, and within it, the 'Miscellaneous' sub-tab is active. Under 'Miscellaneous', the 'Sales Document Overrides' sub-tab is selected, and the 'Header Fields' sub-tab is active. The 'Sales Document Header Override Settings' section contains five rows of input fields. Each row has an 'Override Field' label followed by an empty text box, and a 'Value' label followed by another empty text box. The rows are labeled 'Override Field 01' through 'Override Field 05' and 'Value 01' through 'Value 05'. At the bottom right of the window are 'Save' and 'Close' buttons.

1. In the **Override Field(s) 01-05**, enter the **Sage MAS** field(s), e.g. CommentText\$ and/or ShipToAddress1\$, that you wish to be populated with the **QuoteWerks** information you specify in the associated **Value 01-05** field(s). The Value can either be a macro from QuoteWerks, e.g. &QWDH_ShipToContact, and/or &QWDH_SoldToPONumber etc, or it can be user-defined text that you enter in the **Value 01-05** field(s).

ConnectIt-MAS90 supports a number of macros which enable the transfer of different field values from QuoteWerks into Sage MAS; for full details of the macros available please see the ConnectIt Knowledgebase Article ID 90.

2. Click the **Save** button to retain the settings on the **Document Settings | Miscellaneous | Sales Document Overrides | Header Fields** tab.



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Document Settings (Miscellaneous | Sales Document Overrides | Item Fields tab)

The **Documents | Miscellaneous | Sales Document Overrides | Item Fields** tab enables you to override the default ConnectIt field mappings with your own field mapping requirements.

The screenshot shows the 'ConnectIT Configuration utility' window. The 'Documents' tab is selected, and within it, the 'Miscellaneous' sub-tab is active. Under 'Miscellaneous', the 'Sales Document Overrides' sub-tab is selected, and the 'Item Fields' sub-tab is active. The 'Sales Document Item Override Settings' section contains five rows of input fields. Each row has an 'Override Field' label followed by an empty text box, and a 'Value' label followed by another empty text box. The rows are labeled 'Override Field 01' through 'Override Field 05' and 'Value 01' through 'Value 05'. At the bottom right of the window are 'Save' and 'Close' buttons.

1. In the **Override Field(s) 01-05**, enter the **Sage MAS** field(s), e.g. CommentText\$ and/or ShipToAddress1\$ etc, that you wish to be populated with the **QuoteWerks** information you specify in the associated **Value 01-05** field(s). The Value can either be a macro from QuoteWerks, e.g. &QWDI_UnitCost, and/or &QWDI_CustomNumber01 etc, or it can be user-defined text that you enter in the **Value 01-05** field(s).

ConnectIt-MAS90 supports a number of macros which enable the transfer of different field values from QuoteWerks into Sage MAS; for full details of the macros available please see the ConnectIt Knowledgebase Article ID 90.

2. Click the **Save** button to retain the settings on the **Document Settings | Miscellaneous | Sales Document Overrides | Item Fields** tab.



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Document Settings (Miscellaneous | Purchase Document Overrides | Header Fields tab)

The **Documents | Miscellaneous | Purchase Document Overrides | Header Fields** tab enables you to override the default **ConnectIt-MAS90** field mappings with your own field mapping requirements.

The screenshot shows the 'ConnectIT Configuration utility' window. The 'Documents' tab is selected, and within it, the 'Purchase Document Overrides' sub-tab is active. Under this sub-tab, the 'Header Fields' sub-tab is selected. The main area is titled 'Purchase Document Header Override Settings' and contains five rows of input fields. Each row has an 'Override Field' label followed by an empty text box, and a 'Value' label followed by another empty text box. The rows are labeled 'Override Field 01' through 'Override Field 05' and 'Value 01' through 'Value 05'. At the bottom right of the window, there are 'Save' and 'Close' buttons.

1. In the **Override Field(s) 01-05**, enter the **Sage MAS** field(s), e.g. CommentText\$ and/or ShipToAddress1\$, that you wish to be populated with the **QuoteWerks** information you specify in the associated **Value 01-05** field(s). The Value can either be a macro from QuoteWerks, e.g. &QWDH_ShipToContact, and/or &QWDH_SoldToPONumber etc. or it can be user-defined text that you enter in the **Value 01-05** field(s).

ConnectIt-MAS90 supports a number of macros which enable the transfer of different field values from QuoteWerks into Sage MAS; for full details of the macros available please see the ConnectIt Knowledgebase Article ID 90.

2. Click the **Save** button to retain the settings on the **Document Settings | Miscellaneous | Purchase Document Overrides | Header Fields** tab.



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Document Settings (Miscellaneous | Purchase Document Overrides | Item Fields tab)

The **Documents | Miscellaneous | Purchase Document Overrides | Item Fields** tab enables you to override the default **ConnectIt-MAS90** field mappings with your own field mapping requirements.

The screenshot shows the 'ConnectIT Configuration utility' window. The 'Documents' tab is selected, and within it, the 'Miscellaneous' sub-tab is active. Under 'Miscellaneous', the 'Purchase Document Overrides' sub-tab is selected, and the 'Item Fields' sub-tab is active. The 'Purchase Document Item Override Settings' section contains five rows, each with an 'Override Field' and a 'Value' field. The fields are currently empty. At the bottom right, there are 'Save' and 'Close' buttons.

Override Field	Value
Override Field 01	Value 01
Override Field 02	Value 02
Override Field 03	Value 03
Override Field 04	Value 04
Override Field 05	Value 05

1. In the **Override Field(s) 01-05**, enter the **Sage MAS** field(s), e.g. CommentText\$ and/or ShipToAddress1\$ etc, that you wish to be populated with the **QuoteWerks** information you specify in the associated **Value 01-05** field(s). The Value can either be a macro from QuoteWerks, e.g. &QWDH_ShipToContact, and/or &QWDH_SoldToPONumber etc. or it can be user-defined text that you enter in the **Value 01-05** field(s).

ConnectIt-MAS90 supports a number of macros which enable the transfer of different field values from QuoteWerks into Sage MAS; for full details of the macros available please see the [ConnectIt Knowledgebase Article ID 90](#).

2. Click the **Save** button to retain the settings on the **Document Settings | Miscellaneous | Purchase Document Overrides | Item Fields** tab.



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Advanced Settings (Prompts tab)

The **Advanced | Prompts** tab offers options to suppress the warning messages that the **ConnectIt-MAS90** applications generate when processing information from the **QuoteWerks** document. Please note that suppressing these warning messages is not recommended and may lead to the user missing important feedback when sending information from **QuoteWerks** to **Sage MAS**.

ConnectIT Configuration utility

Sage | QuoteWerks | Customers | Vendors | Products | Other Line Items | Documents | **Advanced**

Prompts

Running ConnectIT

- Suppress prompts that the document is unsaved
- Suppress prompts that there are unsupported line types on the document
- Suppress prompts that there are hidden line types on the document
- Suppress prompts that there are line items with negative values on the document

Using the Wizards

- Suppress prompts that the Product Code already exists in Sage
- Suppress prompts that the Product Description has non-standard characters
- Suppress prompts that Product Codes or Descriptions are too long for Sage

Save Close

1. When transferring **QuoteWerks** document information into **Sage MAS**, you will be prompted by **ConnectIt-MAS90** if the current document is unsaved or if the document items list contains unsupported line types, hidden line types or negative values. If you would prefer not to be prompted, then tick the appropriate box(es) to suppress the prompt(s).

Note: for more details on unsupported and hidden line types, please refer to the ConnectIt online Knowledgebase.

2. When transferring **QuoteWerks** product information into **Sage MAS**, you will be prompted by the **ConnectIt Create Product Wizard** if a Product Code(s) already exists in **Sage MAS**, if the Description contains non-standard characters (@ symbol, carriage return, etc) or if the Description is too long. If you would prefer not to be prompted, then tick the box to suppress the prompt(s).
3. Click the **Save** button to retain the settings on the **Advanced | Prompts** tab.



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