

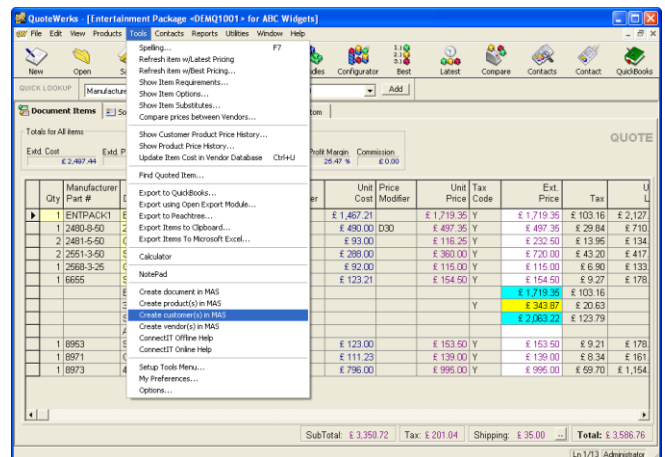
Step-by-Step Guide to the ConnectIt Create Customer Wizard

The **ConnectIt Create Customer Wizard** utility provides a way to create customers in **Sage MAS**. To start the **ConnectIt Create Customer Wizard** application, you can use the **Create customer(s) in MAS** option from the **QuoteWerks | Tools** menu or browse to the **Start | All Programs | ConnectIt** menu and click the **ConnectIt Create Customer Wizard** option.

1. Starting...

Click the **Create Customer(s) in MAS** option from the **QuoteWerks | Tools** menu.

This starts the **ConnectIt Create Customer Wizard**.



2. Welcome...

The **ConnectIt Create Customer Wizard** guides you through creating a new customer(s) in **Sage MAS**.

You will be asked for the following information for the new customer(s):

- the customer's name and unique reference code
- the customer's account preferences
- the customer's contact and payment details

Not all the above information is mandatory. Customers can be created with the minimum information and then further details can be added in **Sage MAS**.

Click **Next** to continue by manually creating a customer, or click **Create Sold To**, **Create Ship To** or **Create Bill To** to transfer the customer information from the selected **QuoteWerks** address details into **Sage MAS**.



3. Mandatory Information...

The following information is mandatory and must be entered before the **ConnectIt Create Customer Wizard** can create a customer(s) in **Sage MAS**.

- Customer Name
- Customer Number
- A/R Division
- Salesperson Code

Once the above information has been entered, you can either click **Next** to continue adding customer information into the following **ConnectIt Create Customer Wizard** screens.

Alternatively, you can click **Finish** to create the customer in **Sage MAS**.

The screenshot shows the 'ConnectIT Create Customer Wizard' window. The title bar reads 'ConnectIT Create Customer Wizard'. The Sage logo is in the top right. The main heading is 'Enter the for mandatory information to create the customer in Sage.' Below this is a paragraph of instructions: 'To create a new customer in Sage MAS you must enter the following details. From this point in the Wizard you can click 'Finish' to apply the default settings and go back to complete the additional details in Sage MAS at a later date or click 'Next' to complete all the details now.' A note follows: 'Note: If you wish to use the Create SoldTo, Create ShipTo or Create BillTo functionality then you do not need to enter a Name and Account Reference here - indicated by the highlighted label.' The form contains four fields: 'Customer Name' (text input), 'Customer Number' (text input), 'A/R Division' (dropdown menu with '00 - Default' selected), and 'Salesperson Code' (dropdown menu with '00 - 0001' selected). At the bottom are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'.

4. Customer Address Details...

On the **customer address details** screen, information can be entered or selected for:

- Address
- Zipcode
- Country
- Telephone
- Fax

This information is not mandatory.

Either click **Next** to continue entering information for the customer or click **Finish** to create the customer in **Sage MAS**.

The screenshot shows the 'ConnectIT Create Customer Wizard' window. The title bar reads 'ConnectIT Create Customer Wizard'. The Sage logo is in the top right. The main heading is 'Enter the customer address details.' Below this is a paragraph: 'Enter the customer's address, telephone and fax details.' The form contains several fields: 'Address 1', 'Address 2', and 'Address 3' (text inputs); 'City' (text input); 'State' (dropdown menu); 'Zipcode' (text input); 'Country' (dropdown menu); 'Telephone' (text input); and 'Fax' (text input). At the bottom are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'.

5. Customer Contact Information...

On the **customer contact information** screen, information can be entered or selected for:

- E-Mail
- Website

This information is not mandatory.

Either click **Next** to continue entering information for the customer or click **Finish** to create the customer in **Sage MAS**.

The screenshot shows the 'ConnectIT Create Customer Wizard' window. The title bar reads 'ConnectIT Create Customer Wizard'. The Sage logo is in the top right. The main heading is 'Enter the customer contact information.' Below this is a paragraph: 'Enter the customer's contact information.' The form contains two fields: 'e-Mail' (text input) and 'Website' (text input). At the bottom are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'.



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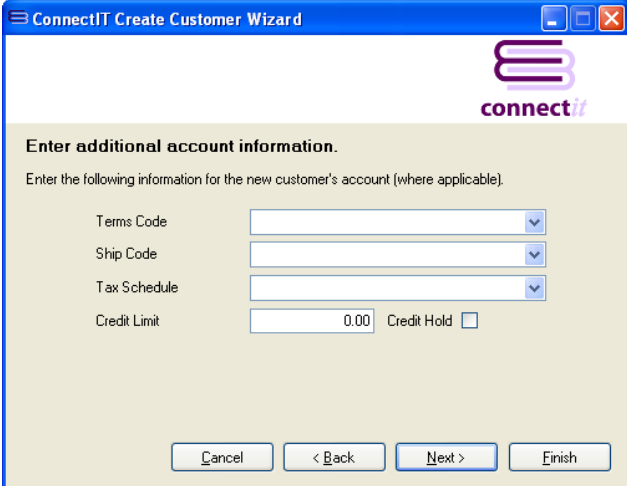
6. Enter Additional Account Information...

On the **additional account information** screen, information can either be entered or selected for:

- Terms Code
- Ship Code
- Tax Schedule
- Credit Limit & Credit Hold

This information is not mandatory.

Either click **Next** to continue entering information for the customer or click **Finish** to create the customer in **Sage MAS**.

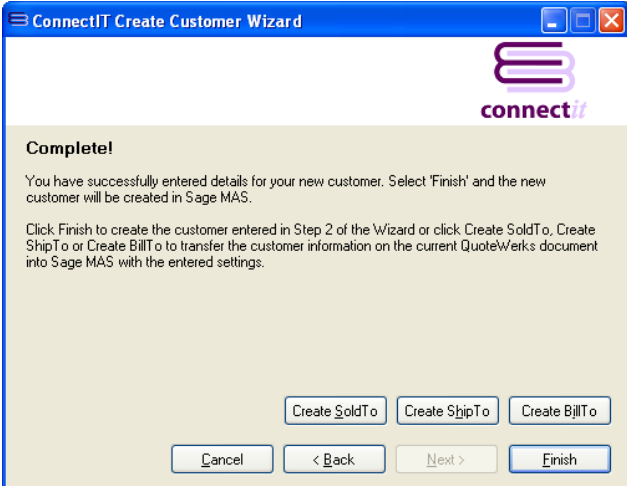


The screenshot shows a window titled "ConnectIT Create Customer Wizard" with the ConnectIT logo in the top right. The main heading is "Enter additional account information." Below this, it says "Enter the following information for the new customer's account (where applicable)." There are four rows of input fields: "Terms Code" with a dropdown arrow, "Ship Code" with a dropdown arrow, "Tax Schedule" with a dropdown arrow, and "Credit Limit" with a text box containing "0.00" and a "Credit Hold" checkbox. At the bottom, there are four buttons: "Cancel", "< Back", "Next >", and "Finish".

7. Complete!

The **ConnectIt Create Customer Wizard** tells you that you have now entered all the information for your new customer.

Click **Finish** to close the **ConnectIt Create Customer Wizard** and create the customer in **Sage MAS**.



The screenshot shows a window titled "ConnectIT Create Customer Wizard" with the ConnectIT logo in the top right. The main heading is "Complete!". Below this, it says "You have successfully entered details for your new customer. Select 'Finish' and the new customer will be created in Sage MAS." There is a paragraph of instructions: "Click Finish to create the customer entered in Step 2 of the Wizard or click Create SoldTo, Create ShipTo or Create BillTo to transfer the customer information on the current QuoteWorks document into Sage MAS with the entered settings." At the bottom, there are four buttons: "Cancel", "< Back", "Next >", and "Finish". Above the "Finish" button, there are three buttons: "Create SoldTo", "Create ShipTo", and "Create BillTo".

8. Additional Customers

Once you have finished entering information for your new customer, the **ConnectIt Create Customer Wizard** gives you the option to use the details you have just entered to create another customer in **Sage MAS**.

Click **Yes** if you would like to do this. Otherwise click **No** to close the **ConnectIt Create Customer Wizard**.



The screenshot shows a window titled "ConnectIT Create Customer Wizard" with a question mark icon on the left. The text says "The new Customer was successfully created in Sage MAS. Would you like to use these details and create another Customer in Sage MAS?". At the bottom, there are two buttons: "Yes" and "No".



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