

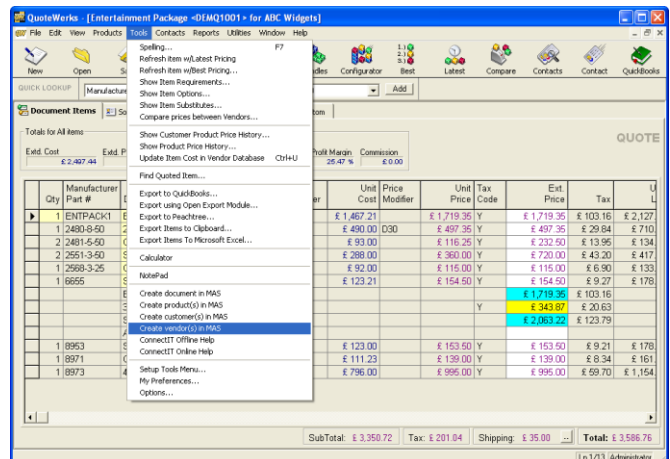
Step-by-Step Guide to the ConnectIt Create Vendor Wizard

The **ConnectIt Create Vendor Wizard** utility provides a way to create vendors in **Sage MAS**. To start the **ConnectIt Create Vendor Wizard** application, you can use the **Create vendor(s) in MAS** option from the **QuoteWerks | Tools** menu or browse to the **Start | All Programs | ConnectIt-MAS90** menu and click the **ConnectIt Create Vendor Wizard** option.

1. Starting...

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

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



2. Welcome...

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

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

- the Vendor's name and unique reference code
- the Vendor's address information
- the Vendor's contact and payment details

Not all the above information is mandatory. Vendors can be created with the minimum information and then further details can be added in **Sage MAS** at a later time.

Click **Next** to continue.



3. Mandatory Information...

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

- Vendor Name
- Vendor Number
- A/P Division

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

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

The screenshot shows the 'ConnectIT Create Vendor Wizard' window. The title bar reads 'ConnectIT Create Vendor Wizard'. The window contains the 'connectit' logo and the heading 'Enter the for mandatory information to create the vendor in Sage.' Below this, a paragraph explains that to create a new vendor, the user must enter details and can either click 'Finish' to apply defaults or 'Next' to complete details. The form includes three input fields: 'Vendor Name' (a text box), 'Vendor Number' (a text box), and 'A/P Division' (a dropdown menu currently showing '01 - TRADE AC'). At the bottom, there are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'.

4. Vendor Address Details...

On the **vendor 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 vendor or click **Finish** to create the vendor in **Sage MAS**.

The screenshot shows the 'ConnectIT Create Vendor Wizard' window. The title bar reads 'ConnectIT Create Vendor Wizard'. The window contains the 'connectit' logo and the heading 'Enter the vendor address details.' Below this, a paragraph asks the user to enter the vendor's address, telephone and fax details. The form includes several input fields: 'Address 1', 'Address 2', 'Address 3', 'City', 'State' (a dropdown menu), 'Zipcode', 'Country' (a dropdown menu), 'Telephone', and 'Fax'. At the bottom, there are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'.

5. Vendor Contact Information...

On the **vendor 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 vendor or click **Finish** to create the vendor in **Sage MAS**.

The screenshot shows the 'ConnectIT Create Vendor Wizard' window. The title bar reads 'ConnectIT Create Vendor Wizard'. The window contains the 'connectit' logo and the heading 'Enter the vendor contact information.' Below this, a paragraph asks the user to enter the vendor's contact information. The form includes two input fields: 'e-Mail' and 'Website'. At the bottom, there are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'.



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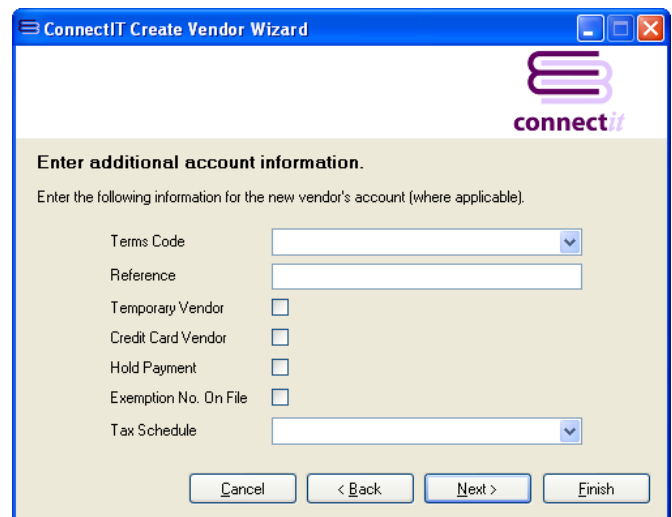
6. Enter Additional Account Information...

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

- Terms Code
- Reference
- Temporary Vendor
- Credit Card Vendor
- Hold Payment
- Exemption Number On File
- Tax Schedule

This information is not mandatory.

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

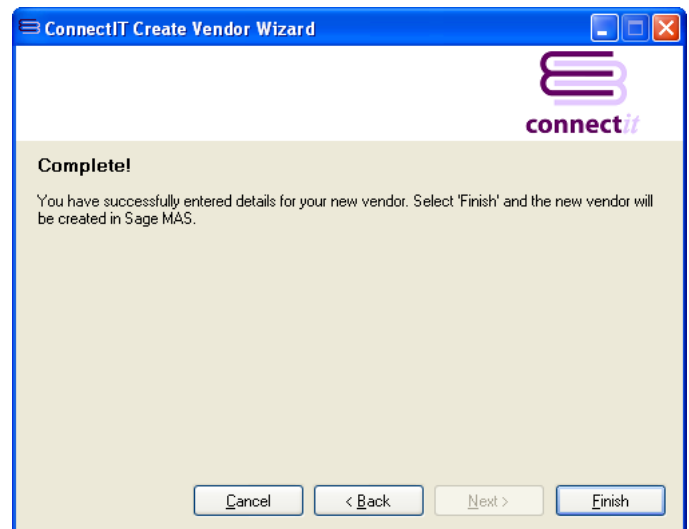


The screenshot shows a window titled "ConnectIT Create Vendor Wizard" with the "connectit" logo in the top right. The main heading is "Enter additional account information." Below this, it says "Enter the following information for the new vendor's account (where applicable)." The form contains several fields: "Terms Code" (a dropdown menu), "Reference" (a text input field), "Temporary Vendor" (checkbox), "Credit Card Vendor" (checkbox), "Hold Payment" (checkbox), "Exemption No. On File" (checkbox), and "Tax Schedule" (a dropdown menu). At the bottom, there are four buttons: "Cancel", "< Back", "Next >", and "Finish".

7. Complete!

The **Connectit Create Vendor Wizard** tells you that you have now entered all the information for your new vendor.

Click **Finish** to close the **Connectit Create Vendor Wizard** and create the vendor in **Sage MAS**.



The screenshot shows a window titled "ConnectIT Create Vendor 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 vendor. Select 'Finish' and the new vendor will be created in Sage MAS." At the bottom, there are four buttons: "Cancel", "< Back", "Next >", and "Finish".

8. Additional Vendors

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

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



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



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