

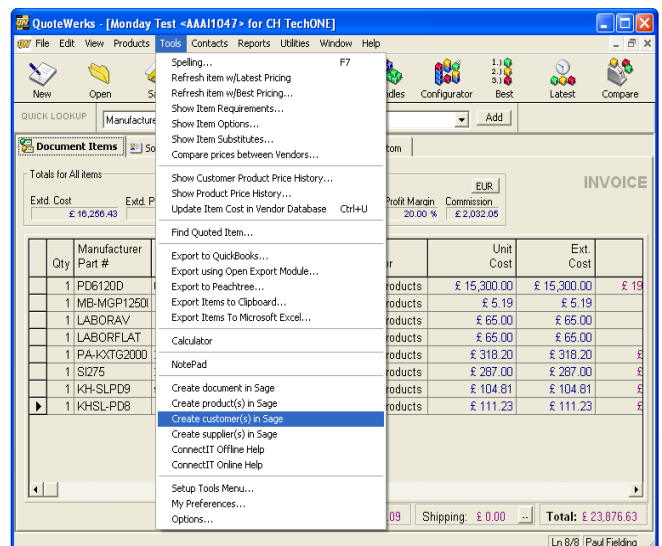
Step-by-Step Guide to the ConnectIt Create Customer Wizard

The **ConnectIt Create Customer Wizard** utility provides a way to create customers in **Sage 200**. To start the **ConnectIt Create Customer Wizard** application, you can use the **Create customer(s) in Sage** option from the **QuoteWerks | Tools** menu or browse to the **Start | All Programs | ConnectIt-Sage200** menu and click the **ConnectIt Create Customer Wizard** option.

1. Starting...

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

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



2. Welcome...

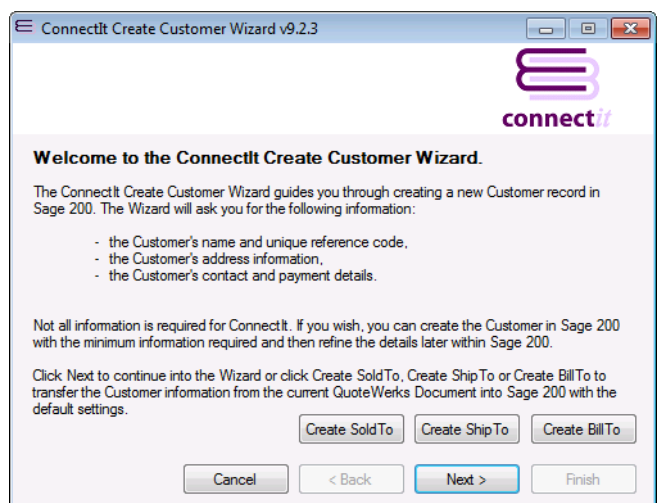
The **ConnectIt Create Customer Wizard** guides you through creating a new customer(s) in **Sage**.

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 credit and bank 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**.

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**.

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**

- Account Reference
- Short Name
- Name

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. Or you can click **Finish** to create the customer in **Sage**.

If you would like the **ConnectIt Create Customer Wizard** to auto-generate an **Sage 200 Account Reference** based on the Configuration Prefix, Format and Seed settings, then click the ellipses (“...”) button.

ConnectIt Create Customer Wizard v9.2.3

connectit

Enter the for mandatory information to create the Customer in Sage.

To create a new Customer in Sage 200 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 200 at a later date or click Next to complete all the details now.

Note: If you wish to use the Create Sold To, Create Ship To or Create Bill To functionality then you do not need to enter a Name and Account Reference here - indicated by the highlighted label.

Account Reference ...

Short Name

Name

Cancel < Back Next > Finish

4. Customer Address Details...

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

- Address
- Postcode
- 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**.

ConnectIt Create Customer Wizard v9.2.3

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Enter the Customer address details.

Enter the Customer's address, telephone and fax details.

Address 1

Address 2

Address 3

City

Country Postcode

Country

Telephone

Fax

Cancel < Back Next > Finish

5. Customer Contact Information...

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

- Contact Name
- e-Mail
- Telephone
- Mobile
- Fax
- 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**.

The screenshot shows a window titled "ConnectIt Create Customer Wizard v9.2.3". The "connectit" logo is in the top right. The main heading is "Enter the Customer contact information." Below it, the instruction says "Enter the Customer's contact information." There are input fields for "Contact Name", "e-Mail", "Telephone" (split into three boxes), "Mobile" (split into three boxes), "Fax" (split into three boxes), and "Website". At the bottom, there are four buttons: "Cancel", "< Back", "Next >", and "Finish".

6. Customer Account Information...

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

- Tax Code
- Tax Number
- Currency

This information is not mandatory.

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

The screenshot shows a window titled "ConnectIt Create Customer Wizard v9.2.3". The "connectit" logo is in the top right. The main heading is "Enter the Customer account information." Below it, the instruction says "Enter the Customer's account information." There are dropdown menus for "Tax Code", "Tax Number" (text input), and "Currency" (set to "GBP - Pounds Sterling"). 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**.

The screenshot shows a window titled "ConnectIt Create Customer Wizard v9.2.3". The "connectit" logo is in the top right. The main heading is "Complete!". Below it, the text says "You have successfully entered details for your new Customer. Select 'Finish' and the new Customer will be created in Sage 200." There is a sub-heading "Complete!" followed by 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 QuoteWerks Document into Sage 200 with the entered settings." There are three buttons: "Create SoldTo", "Create ShipTo", and "Create BillTo". At the bottom, there are four buttons: "Cancel", "< Back", "Next >", and "Finish".

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**.

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

