

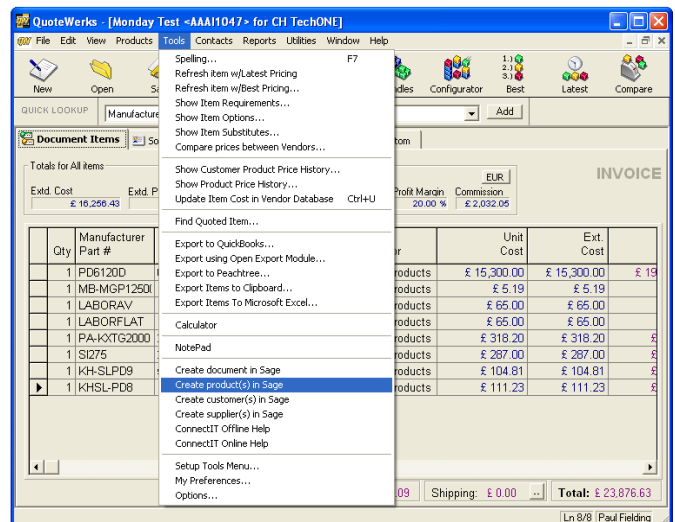
# Step-by-Step Guide to the ConnectIt Create Product Wizard

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

## 1. Starting...

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

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



## 2. Welcome...

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

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

- product description and unique reference code
- product information
- product group, warehouse and supplier details

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

Click **Next** to continue by manually creating a single product, or click **Create All** to create all the products in **Sage** that are highlighted in the **QuoteWerks** document.



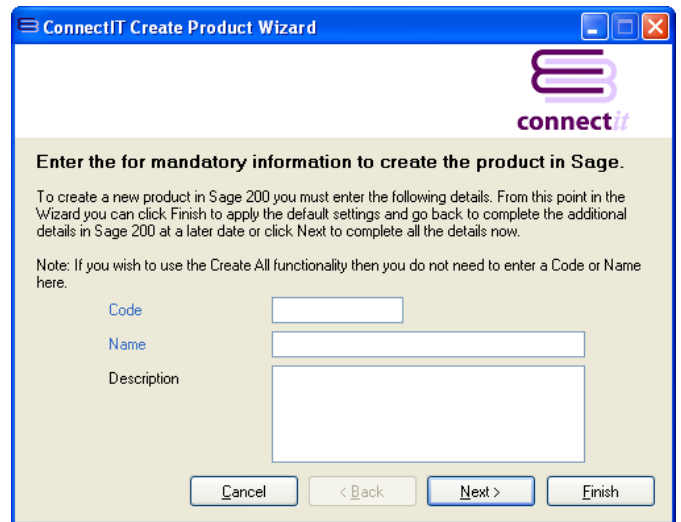
### 3. Mandatory Information...

The following information is mandatory and must be entered before the **ConnectIt Create Product Wizard** can create a product(s) in **Sage**

- Code
- Name

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

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



The screenshot shows the 'ConnectIT Create Product Wizard' window. The title bar reads 'ConnectIT Create Product Wizard'. The window contains the 'connectit' logo and the heading 'Enter the for mandatory information to create the product in Sage.' Below this, there is a note: 'To create a new product 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.' A second note states: 'Note: If you wish to use the Create All functionality then you do not need to enter a Code or Name here.' The form has three input fields: 'Code', 'Name', and 'Description'. At the bottom, there are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'.

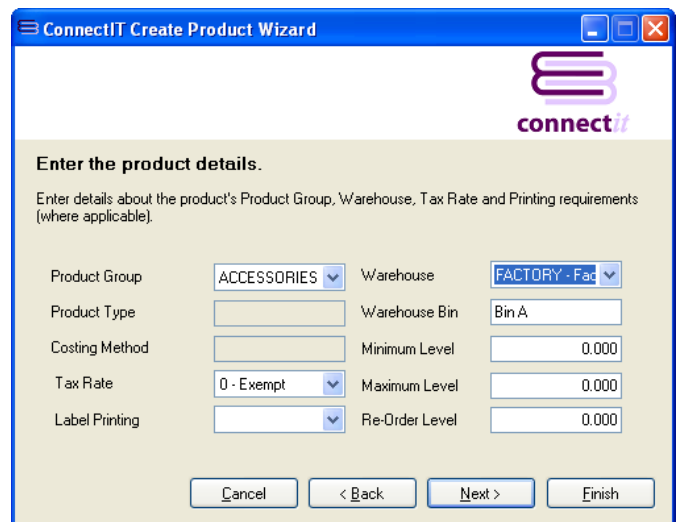
### 4. Product Details...

On the **product details screen**, information can be entered for:

- Product Group
- Warehouse
- Tax Rate

This information is not mandatory.

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



The screenshot shows the 'ConnectIT Create Product Wizard' window. The title bar reads 'ConnectIT Create Product Wizard'. The window contains the 'connectit' logo and the heading 'Enter the product details.' Below this, there is a note: 'Enter details about the product's Product Group, Warehouse, Tax Rate and Printing requirements (where applicable).' The form has several fields: 'Product Group' (dropdown menu with 'ACCESSORIES' selected), 'Warehouse' (dropdown menu with 'FACTORY - Fac' selected), 'Product Type' (text box), 'Warehouse Bin' (text box with 'Bin A'), 'Costing Method' (text box), 'Minimum Level' (text box with '0.000'), 'Tax Rate' (dropdown menu with '0 - Exempt' selected), 'Maximum Level' (text box with '0.000'), 'Label Printing' (dropdown menu), and 'Re-Order Level' (text box with '0.000'). At the bottom, there are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'.

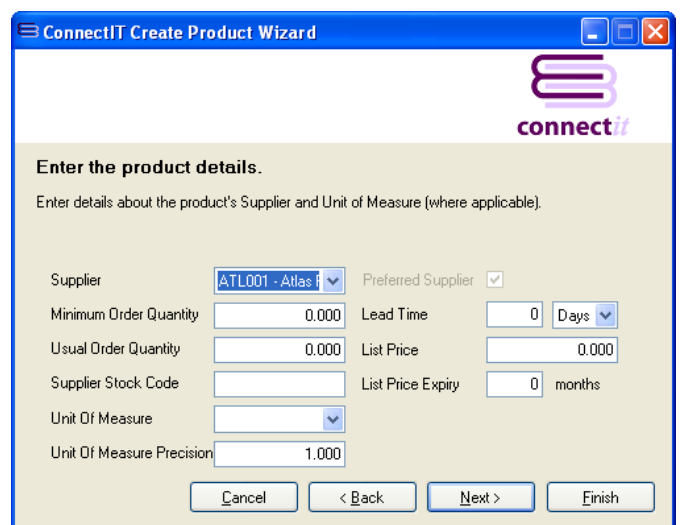
### 5. Product Details...

On the **product sales details screen**, information can either be entered or selected for:

- Supplier details
- Order quantities
- Unit of Measure
- Pricing

This information is not mandatory.

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



The screenshot shows the 'ConnectIT Create Product Wizard' window. The title bar reads 'ConnectIT Create Product Wizard'. The window contains the 'connectit' logo and the heading 'Enter the product details.' Below this, there is a note: 'Enter details about the product's Supplier and Unit of Measure (where applicable).' The form has several fields: 'Supplier' (dropdown menu with 'ATL001 - Atlas f' selected), 'Preferred Supplier' (checkbox checked), 'Minimum Order Quantity' (text box with '0.000'), 'Lead Time' (text box with '0' and 'Days' dropdown), 'Usual Order Quantity' (text box with '0.000'), 'List Price' (text box with '0.000'), 'Supplier Stock Code' (text box), 'List Price Expiry' (text box with '0' and 'months'), 'Unit Of Measure' (dropdown menu), and 'Unit Of Measure Precision' (text box with '1.000'). At the bottom, there are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'.

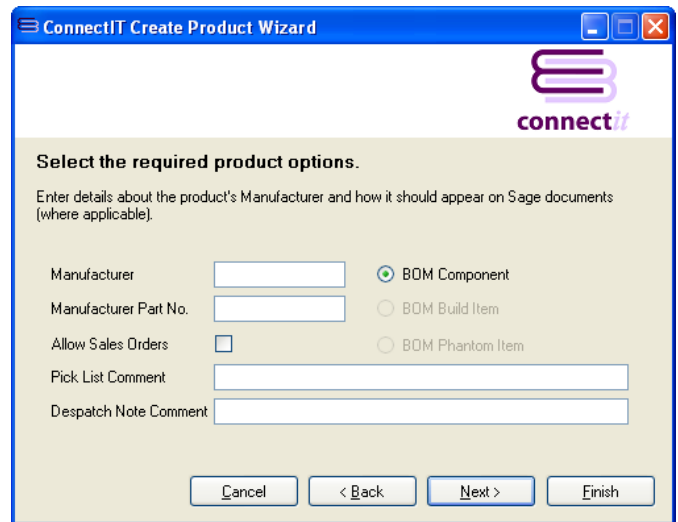
## 6. Product Details...

On the **product sales details** screen, information can either be entered or selected for:

- Manufacturer details
- Comments

This information is not mandatory.

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

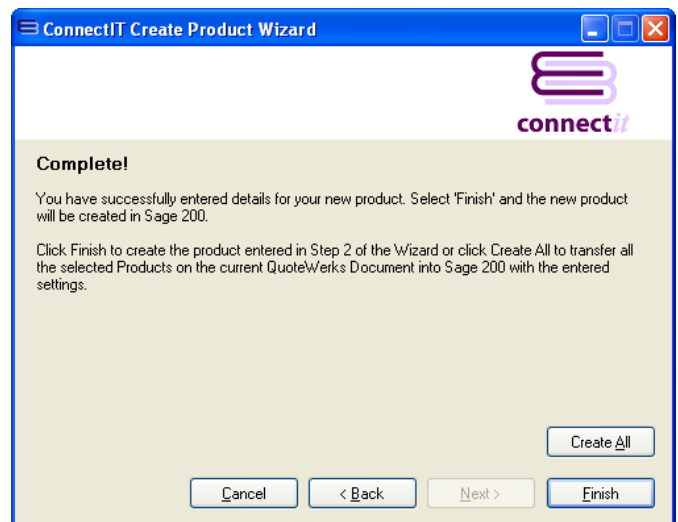


The screenshot shows the 'ConnectIT Create Product Wizard' window. The title bar reads 'ConnectIT Create Product Wizard'. The window contains the 'connectit' logo in the top right corner. The main content area is titled 'Select the required product options.' and includes the instruction: 'Enter details about the product's Manufacturer and how it should appear on Sage documents (where applicable).' Below this, there are several input fields and radio buttons: 'Manufacturer' (text box), 'Manufacturer Part No.' (text box), 'Allow Sales Orders' (checkbox), 'Pick List Comment' (text box), and 'Despatch Note Comment' (text box). To the right of these fields are three radio button options: 'BOM Component' (selected), 'BOM Build Item', and 'BOM Phantom Item'. At the bottom of the window, there are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'.

## 7. Complete!

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

Click **Finish** to close the **ConnectIt Create Product Wizard** and create the product in **Sage**.



The screenshot shows the 'ConnectIT Create Product Wizard' window. The title bar reads 'ConnectIT Create Product Wizard'. The window contains the 'connectit' logo in the top right corner. The main content area is titled 'Complete!' and includes the instruction: 'You have successfully entered details for your new product. Select 'Finish' and the new product will be created in Sage 200.' Below this, there is a paragraph: 'Click Finish to create the product entered in Step 2 of the Wizard or click Create All to transfer all the selected Products on the current QuoteWerks Document into Sage 200 with the entered settings.' At the bottom of the window, there are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'. A 'Create All' button is also visible on the right side of the window.

## 8. Additional Products

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

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



The screenshot shows a confirmation dialog box titled 'ConnectIT Create Product Wizard'. The dialog box contains a question mark icon and the text: 'The new product was successfully created in Sage. Would you like to use these details and create another product in Sage?'. Below the text are two buttons: 'Yes' and 'No'.