Step-by-Step Guide to Configuration

The **ConnectIt Configuration** utility provides a way to check or change the various settings the **ConnectIt** software uses when creating documents, customers, products and suppliers in **Sage 50 Accounts**.

To open the **ConnectIt Configuration** application, browse to the **Start | All Programs | ConnectIt** menu and click the **ConnectIt Configuration** option.

General Note: The field names in the drop down lists in the ConnectIt 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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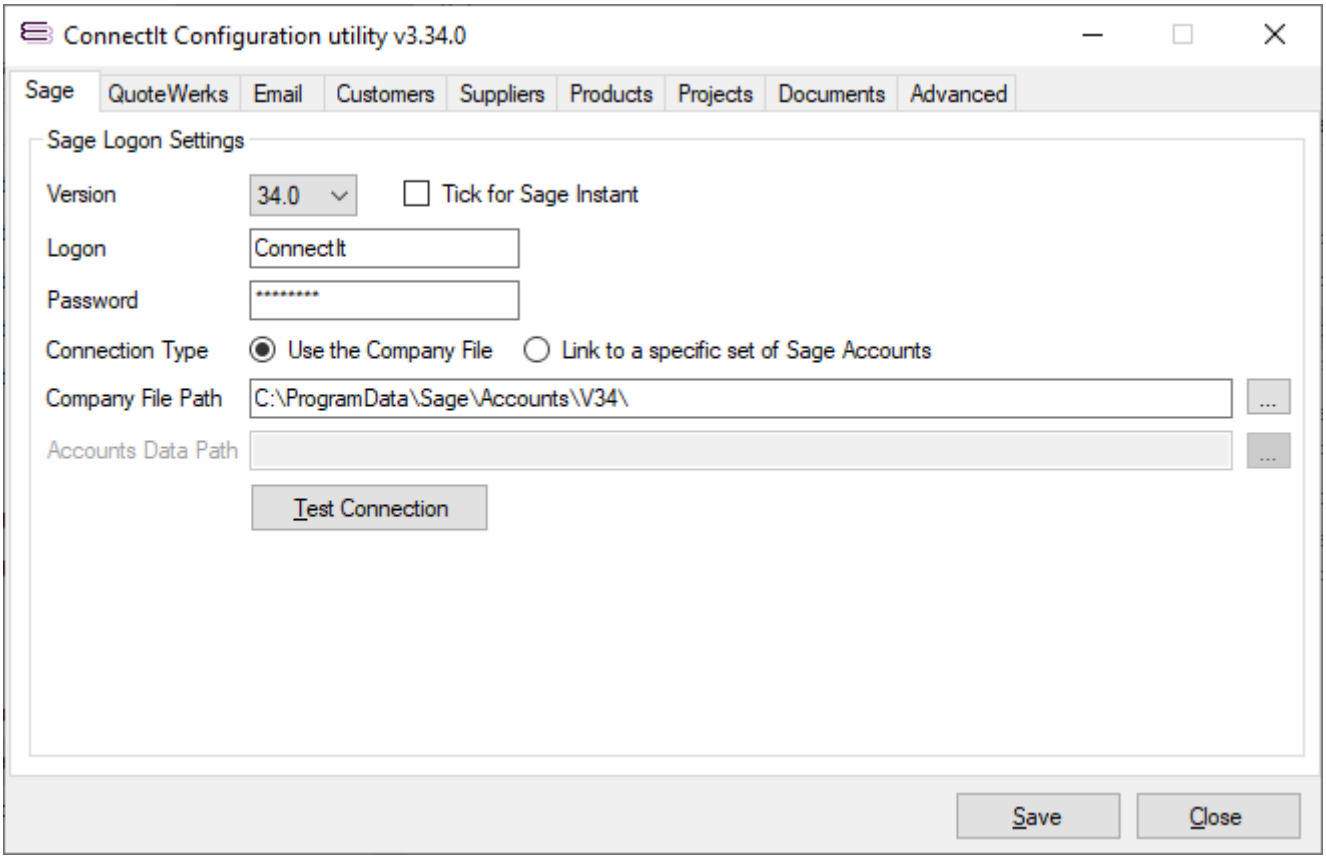
Sage Logon Settings

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



1. On the **Sage** tab, select the **Version** of **Sage** that you are running and then enter your **Logon**, and **Password**, as appropriate for your **Sage** installation.
2. Select the **Connection Type** you would like to create; this is particularly useful if you run multiple sets of **Sage** accounts.

If selecting the **Use the Company File** option, **ConnectIt** will automatically read the list of accounts from the **Sage** COMPANY file – if just one set of accounts is set up, then **ConnectIt** will link to this set of accounts, but if more than one set of accounts are available, then **ConnectIt** will prompt the user to select which set of accounts to send the **QuoteWerks** document information to each time a transfer is made.

If selecting the **Link to a specific set of Sage Accounts** option, **ConnectIt** will link only to the specified set of **Sage** accounts. If multiple sets of accounts have been set up, then the user will not be prompted to select which set of accounts to send the **QuoteWerks** document information to. The **QuoteWerks** document information will always be sent to the set of accounts as specified in the Company File path.

3. Set the appropriate path.

When using the **Use the Company File** option, the **Company File Path** must be entered. The Company File Path is the path where the **Sage** COMPANY file resides (see screenshots below). The path can either be free typed or the Company button can be clicked and the path selected from the folder dialogue.

When using the **Link to a specific set of Sage Accounts** option, the **Accounts Data Path** must be entered. The Accounts Data Path is the path to the ACCDATA folder of the set of accounts that you would like **ConnectIt** to send the **QuoteWerks** document information to. The default path is C:\Program Files\Sage\Accounts\ACCDATA\, but in a production or multi-user environment, this may be on a server, for example, \\myServer\myShare\Sage\ACCDATA\ (or similar).

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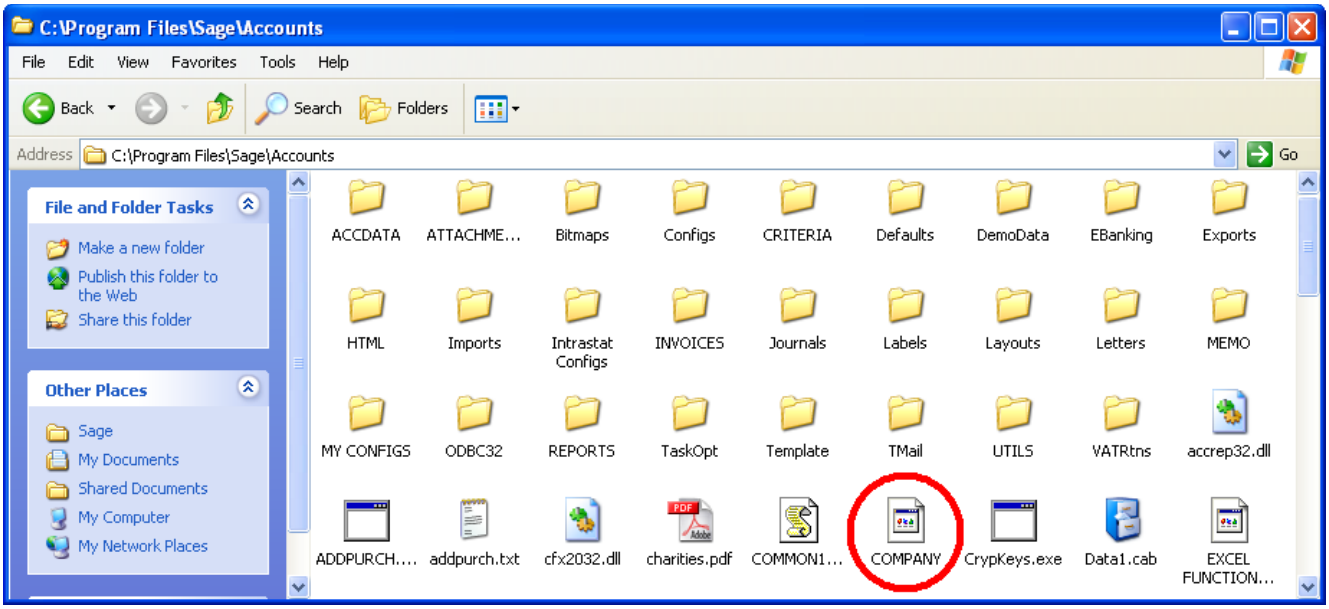
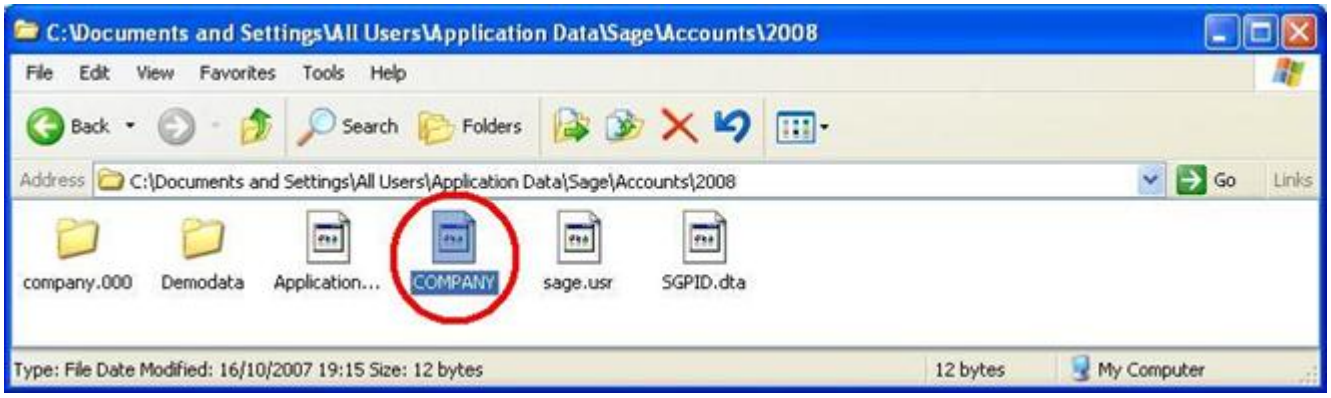
Note: The COMPANY file may not exist if a non-demo data Company has not yet been created in Sage.

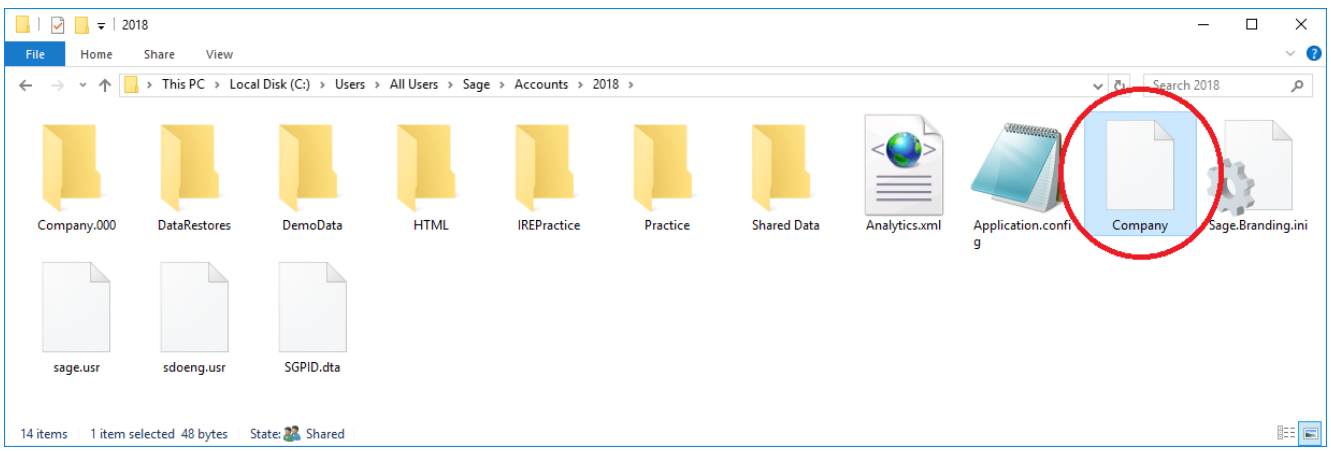
For **Sage 2007 (v13)** and earlier, the default path for the COMPANY file is C:\Program Files\Sage\Accounts\.



For **Sage 50 Accounts 2008 (v14)** and above, the default path for the COMPANY file is C:\Documents and Settings\All Users\Application Data\Sage\Accounts\YYYY or C:\Users\All Users\Sage\Accounts\YYYY where "YYYY" represents the year of the release.

For **Sage Instant Accounts 2009 (v15)** and above, the default path for the COMPANY file is C:\Documents and Settings\All Users\Application Data\Sage\Accounts\YYYYInstant or C:\Users\All Users\Sage\Accounts\YYYYInstant where "YYYY" represents the year of the release.





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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 **Sage** tab.

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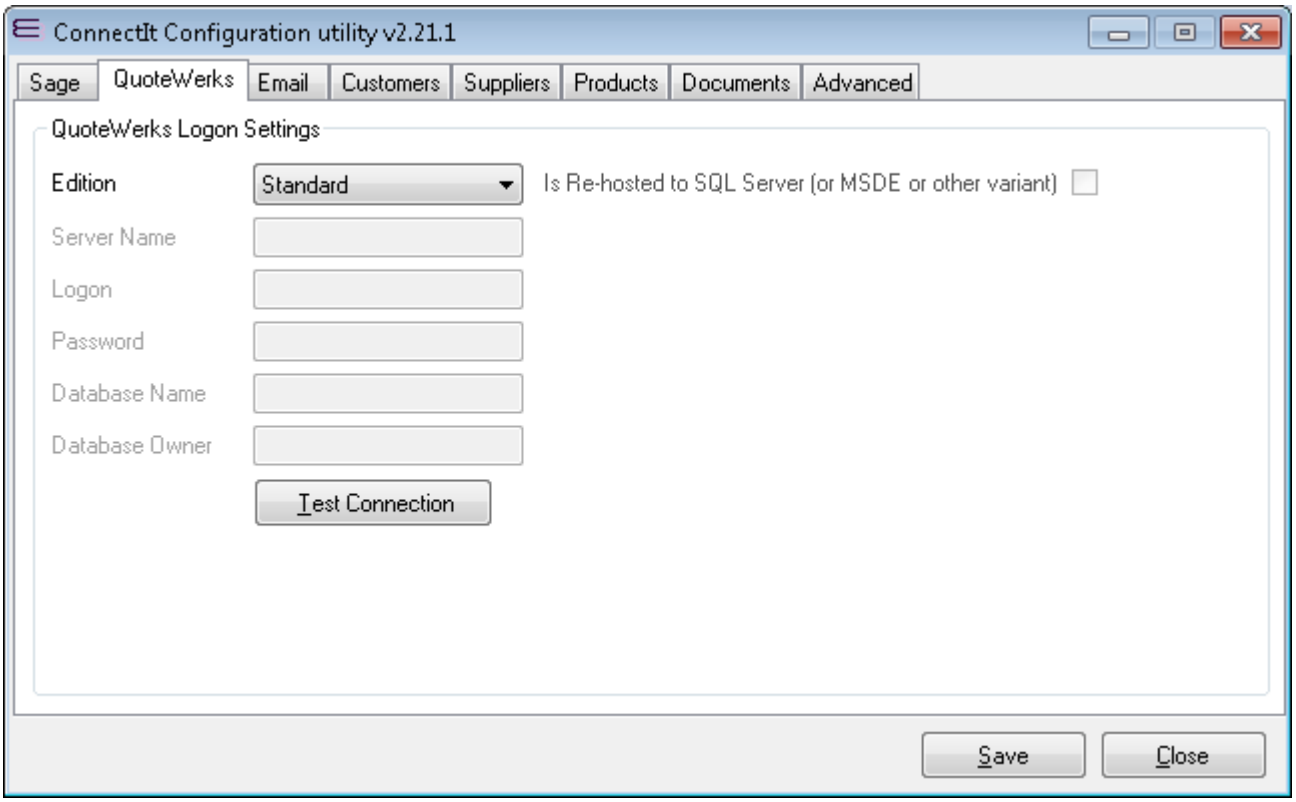
QuoteWerks Settings

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

Note: The QuoteWerks connection does not need to be configured unless creating Purchase Order or Back-to-Back document types in Sage.



1. On the **QuoteWerks** tab, select the **Edition** of **QuoteWerks** that you are running.
2. If running the **QuoteWerks Corporate** edition, 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 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 **backend.ini** file in the **QuoteWerks** installation directory.

Note: The password value is encrypted in the backend.ini file. You may need to ask your IT systems administrator or the person who 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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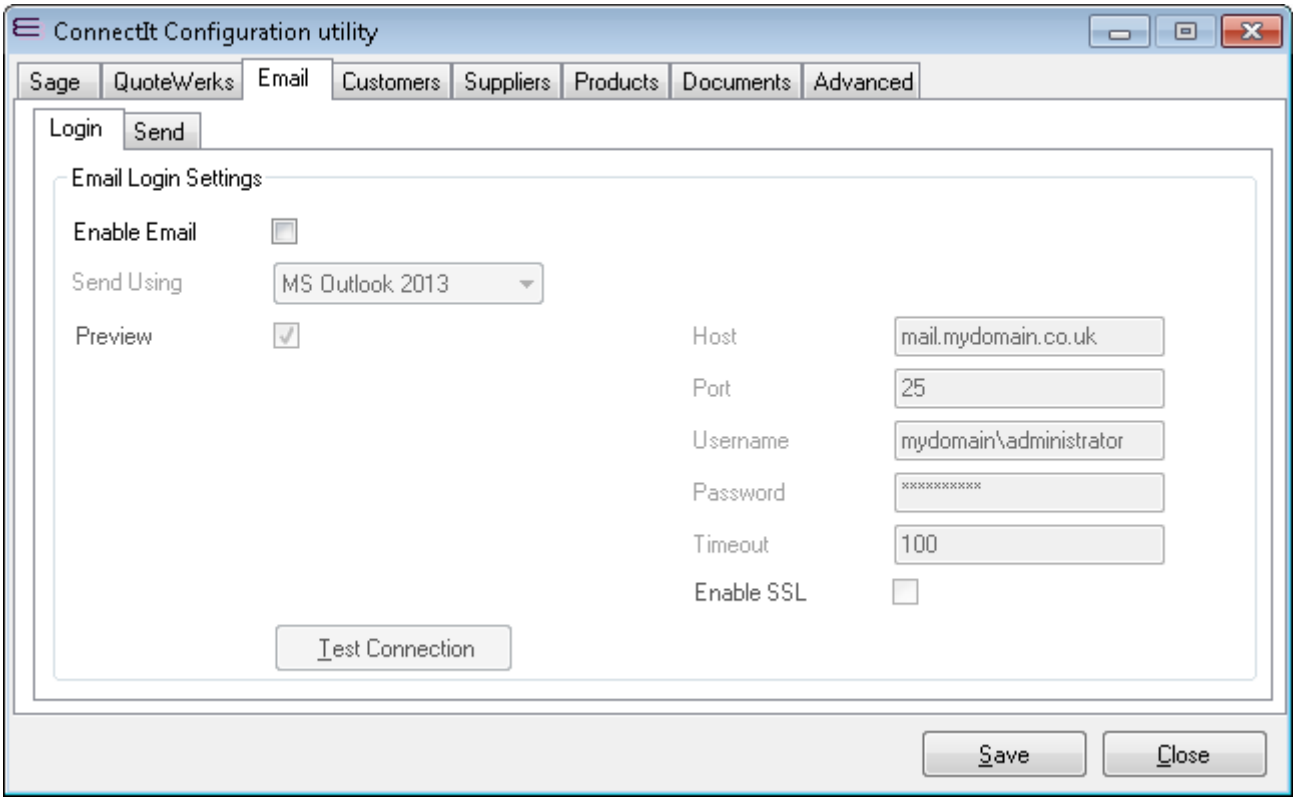
Email Settings (Login tab)

The **Email** | **Login** tab provides options on if and how notification emails are sent when Documents are transferred from **QuoteWerks** into **Sage**.



1. If you would like notification emails to be sent, then tick the **Enable Email** option.
2. Ticking **Enable Email** will enable the **Send Using** dropdown option where you can choose between Microsoft Outlook or SMTP Client to send the notification emails.
3. If **Microsoft Outlook** is selected in the dropdown, then this will enable the **Preview** option. If the **Preview** option is ticked, then **ConnectIt** will display the email for the User to click Send; if the **Preview** option is not ticked, then **ConnectIt** simply sends the email.
4. If **SMTP Client** is selected in the dropdown, then this will enable the **Host**, **Port**, **Username**, **Password**, **Timeout** and **Enable SSL** options. Each of these fields should be completed with the details relevant to your email setup. Please contact your network administrator for these details.
5. Click the **Save** button to retain the settings on the **Email** tab.

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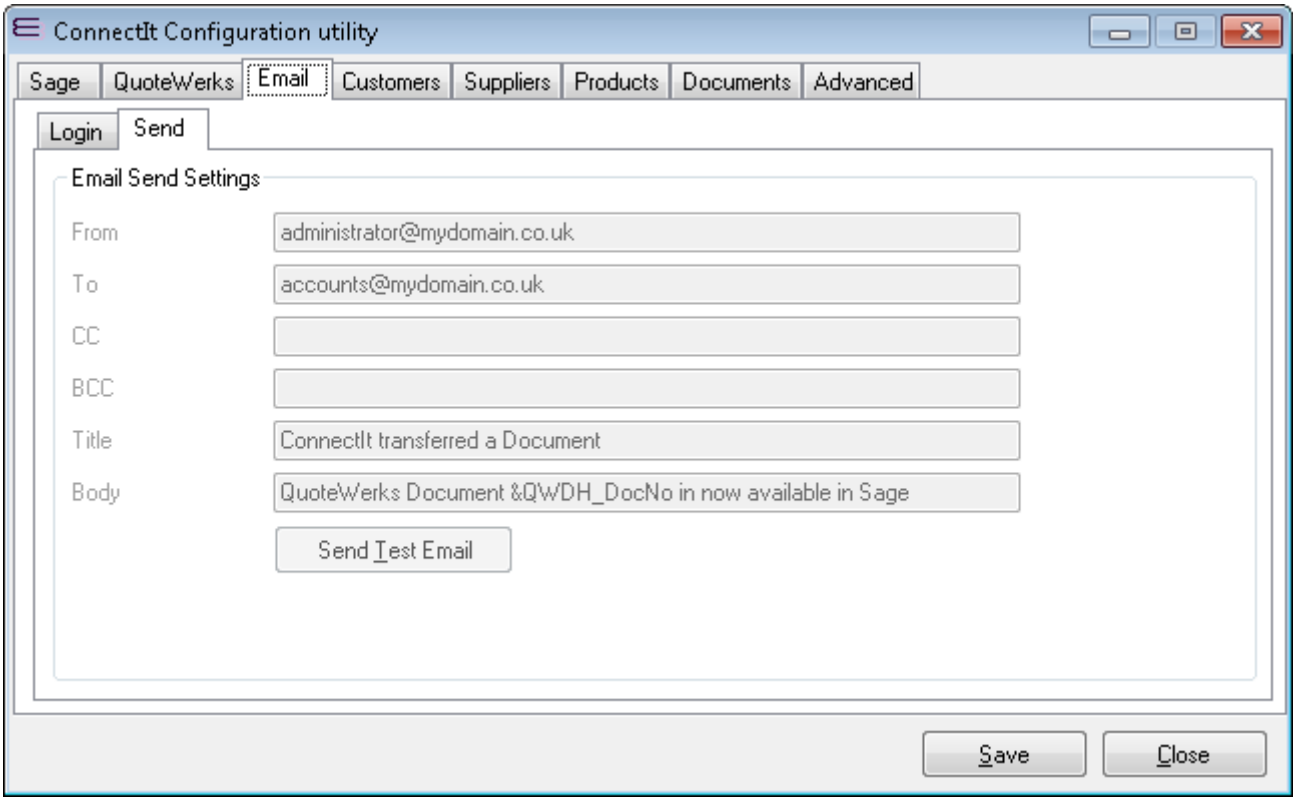
Email Settings (Send tab)

The **Email** | **Send** tab enables you to configure who receives notification emails and the content of the emails when Documents are transferred from **QuoteWerks** into **Sage**.



1. The **From** option defines who the email is addressed from.

Note: the From option is available when using SMTP Client email only.

2. The **To**, **CC** and **BCC** options define who receives the email notification.
3. The **Title** and **Body** options define the subject line and content for the email notification.

Note: All of these options – From, To, CC, BCC, Title and Body – support the ConnectIt advanced macros so placeholders may be entered into the options which will get translated into values based on the content of the particular Document being transferred.

For more information on ConnectIt advanced macros, please refer to the Knowledgebase Article here: http://www.connectit-software.co.uk/support/article.aspx?ID=350

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

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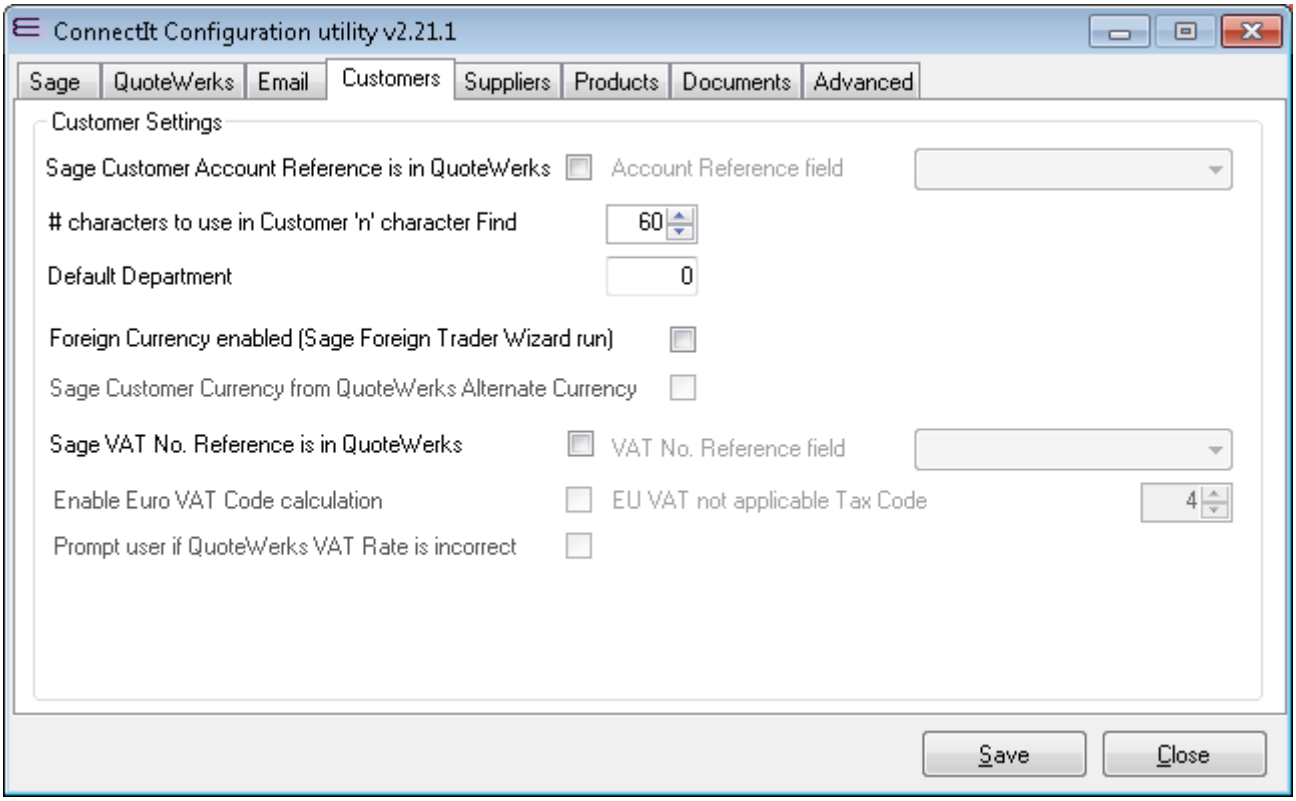
Customer Settings

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



1. If you have the **Sage Customer Account Reference** within the **QuoteWerks** document, then 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** dropdown; select the appropriate custom field where the **Sage Customer Account Reference** is held.

Note: If, when transferring a document from QuoteWerks to Sage, 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 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** will use in trying to find a match. Setting this value to the maximum 60 turns the 'n' character search off.

Note: For more details on how ConnectIt attempts to match the QuoteWerks Company Name to a Sage Account Reference, please refer to the ConnectIt Software website Support Knowledgebase.

3. If when using the **Create Customer(s) in Sage Wizard**, you would like a default Department to be entered for the new customer in **Sage**, type the required Department number into the **Default Department** field.

Note: In order for the Default Department to be entered for the new customer in Sage, it is also necessary to tick the Customer Wizard to load default Department option on the Advanced | Wizards tab.

4. Ticking **Foreign Currency enabled (Sage Foreign Trader Wizard run)** confirms that the **Foreign Trader Wizard** has been run in **Sage**.

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Note: The Foreign Trader Wizard must be run in Sage | Modules | Wizards if you require ConnectIt to transfer foreign currency information to Sage.

5. Ticking the **Sage Customer Currency from QuoteWerks Alternate Currency** option enables the **Create customer(s) in Sage** wizard to create customer record(s) in **Sage** with their default currency taken from the **Alternate Currency** on the **QuoteWerks** document.

Note: To enable this option, the Foreign Trader Wizard must first be run in Sage | Modules | Wizards and the Foreign Currency enabled (Sage Foreign Trader Wizard run) option above must be ticked in the ConnectIt Configuration utility.

6. If the customer's VAT number is within the **QuoteWerks** document, tick the **Sage VAT No. Reference is in QuoteWerks** box.
7. Ticking the **Sage VAT No. Reference is in QuoteWerks** box will activate the **VAT No. Reference field** drop down list enabling you to select the **QuoteWerks** field that the customer's VAT number is held in. Then when you use ConnectIt's Create Customer in Sage wizard, the customer's VAT number will be transferred from the selected **QuoteWerks** field into the **VAT Number** field in the **Customer Record** in **Sage**.
8. Ticking the **Enable Euro VAT Code** box will activate the **EU VAT not applicable Tax Code** box enabling the appropriate value to be entered for the **EU VAT not applicable tax code**.

Note: To enable this option to use the correct tax code during document creation, European customers' tax code needs to be entered in the field selected in the VAT No. Reference field drop down list box.

9. If the **Prompt user if QuoteWerks VAT Rate is incorrect** option is ticked, **ConnectIt** will check that the tax code on the **QuoteWerks Sale Info** tab corresponds to the country in the **QuoteWerks Address**. If the tax code is not as expected for the country in question, **ConnectIt** will warn the user before the document is transferred to **Sage**, allowing the user to change the tax code if appropriate.
10. Click the **Save** button to retain the settings on the **Customers** tab.

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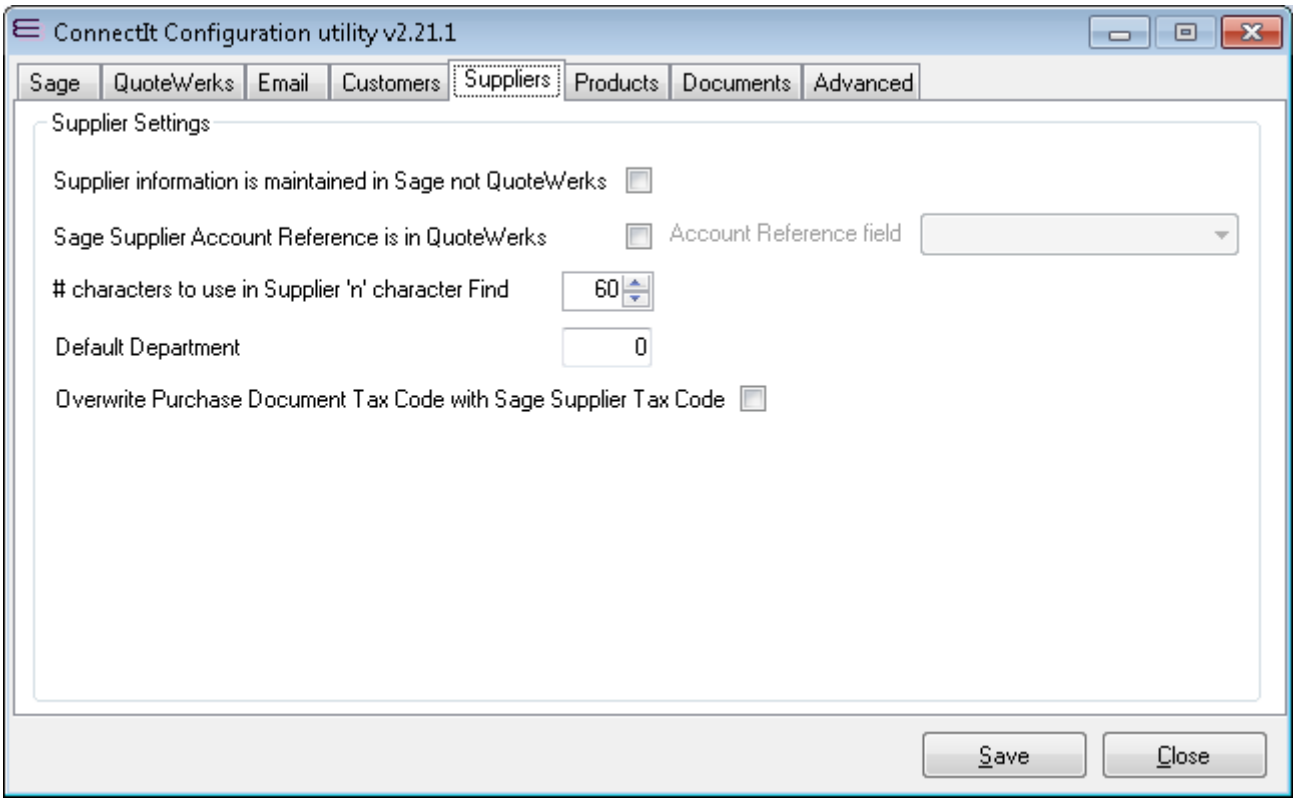
Suppliers Settings

The **Suppliers** tab provides options on how supplier account information is matched and handled between **QuoteWerks** and **Sage**.

Note: The Supplier Settings do not need to be configured unless creating Purchase Order or Back-to-Back document types in Sage.



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

Note: If, when transferring a document from QuoteWerks to Sage, 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 should perform searches on the Company Name in an attempt to find an account reference.

3. The **# characters to use in Supplier 'n' character Find** defines how many characters from the start of the **QuoteWerks Company Name** that **ConnectIt** will use in trying to find an a match. Setting this value to the maximum 60 turns the 'n' character search off.

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

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4. If when using the **Create Supplier(s) in Sage wizard**, you would like a default Department to be entered for the new supplier in **Sage**, type the required Department number into the **Default Department** field.

Note: In order for the Default Department to be entered for the new supplier in Sage, it is also necessary to tick the Supplier Wizard to load default Department option on the Advanced | Wizards tab.

5. If when creating purchase documents in **Sage**, you would like the purchase document in **Sage** to pick up the supplier's default Tax Code, tick the **Overwrite Purchase Document Tax Code with Sage Supplier Tax Code** box.
6. Click the **Save** button to retain the settings on the **Suppliers** tab.

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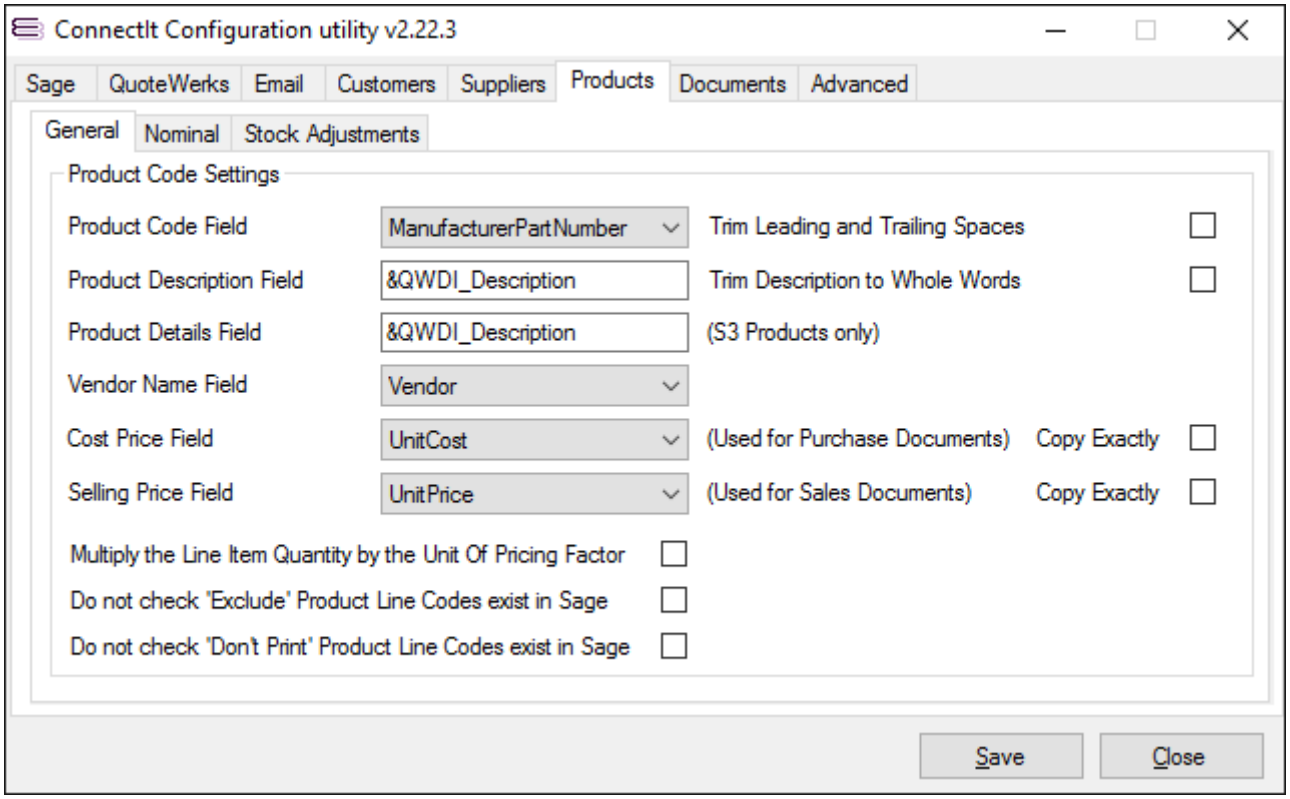
Product Settings (General tab)

The **Products | General** tab defines which fields from **QuoteWerks** are used when creating document in **Sage** and how the product Document Line Items are transferred from **QuoteWerks** to **Sage**.



1. By default, **ConnectIt** uses the **Manufacturer Part Number** field in **QuoteWerks** to match with the product code in **Sage**. If you would prefer **ConnectIt** to use a different field in **QuoteWerks,** click the drop down list box to select an alternative, i.e. **Vendor Part Number**, **Custom Text 01–10** (product fields) etc.
2. If copy/pasting **Product Codes** from a website or other source into **QuoteWerks**, sometimes leading or trailing spaces may be appended accidentally which can cause problems in Sage. To ensure that no leading or trailing spaces are included in the **Product Code**, tick the **Trim Leading and Trailing Spaces** option.
3. A macro can be entered to specify what information from **QuoteWerks** is transferred into the Product Description Field in **Sage**.

Note: ConnectIt-Sage50 supports a number of macros which enable the transfer of different field values from QuoteWerks into Sage 50 Accounts; for full details of the macros available please see the ConnectIt Knowledgebase Article ID 90.

4. If there are very long Product Descriptions in **QuoteWerks** that exceed the maximum number of 60 characters allowed in the **Sage** Product Description field, then **ConnectIt** will trim the value to the number of characters allowed; if you would like ConnectIt to trim it to leave whole words only, then tick the **Trim Description to Whole Words** option.
5. A macro can be entered to specify what information from **QuoteWerks** is transferred into the Product Details Field for S3 products in **Sage**.

Note: ConnectIt-Sage50 supports a number of macros which enable the transfer of different field values from QuoteWerks into Sage 50 Accounts; for full details of the macros available please see the ConnectIt Knowledgebase Article ID 90.

6. By default, **ConnectIt** uses the **Vendor** field in **QuoteWerks** to match with the Supplier Name in **Sage**. If you would prefer **ConnectIt** to use a different field in **QuoteWerks,** click the drop down list box to select an alternative, i.e. **Manufacturer**, **Custom Text 01–10** (product fields) etc.

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7. Click the drop down list box to select which field from **QuoteWerks** **ConnectIt** should use for transfer into the Cost Price Field on Purchase Documents in **Sage.** In the case of Suppliers who are set up for Foreign Currency in **Sage** but you do not want the **Sage** Foreign Currency conversion rate to be applied, tick the **Copy Exactly** tick box, to transfer the exact value from the selected **QuoteWerks** field onto the **Sage** purchase document.

8. Click the drop down list box to select which field from **QuoteWerks** **ConnectIt** should use for transfer into the Selling Price Field on Sales documents in **Sage.** In the case of Customers who are set up for Foreign Currency in **Sage** but you do not want the **Sage** Foreign Currency conversion rate to be applied to the document in **Sage**, tick the **Copy Exactly** tick box to transfer the exact value from the selected **QuoteWerks** field onto the **Sage** sales document.

9. If you use the **QuoteWerks Unit Of Pricing Factor** field when quoting prices, then tick the **Multiply the Line Item Quantity by the Unit Of Pricing Factor** tick box to ensure that the Documents match between **QuoteWerks** and **Sage**.

10. By default, **ConnectIt** will check that the Product Codes for all **Product / Service Line Items** in **QuoteWerks** exist in Sage. If you are not transferring '**Exclude**' or '**Don't Print**' **Line Item Types** (see **Document Settings | Transfer Settings tab** section) and do not wish to transfer '**Exclude**' or '**Don't Print**' **Line Item Types**, then tick the **Do not check 'Exclude' Product Line Codes exist in Sage** and/or **Do not check 'Don't Print' Product Line Codes exist in Sage** respectively.

11. Click the **Save** button to retain the settings on the **Products** tab.

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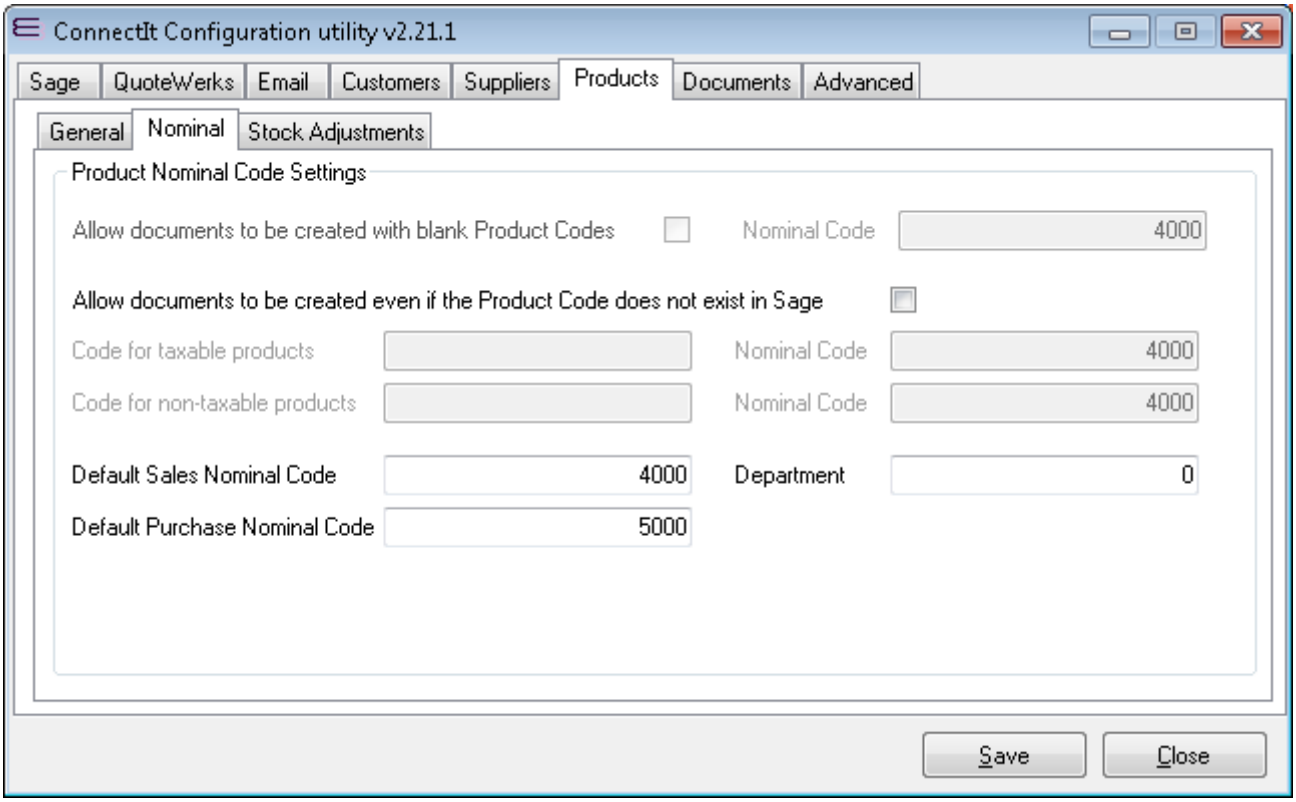
Product Settings (Nominal tab)

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



1. By default, the **Product Settings** on the **Products** tab do not allow documents to be created if a product code is blank in the **QuoteWerks** document. Tick the tick box if you would like documents to be created even if the product codes are blank.

Note: This feature is not available if you are using Sage 2007 (v 13) or above.

2. If you have allowed documents to be created with blank product codes, you must enter the appropriate **Nominal Code** to be used for the products.
3. 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**. Tick the tick box if you would like documents to be created even if the product code does not exist in **Sage**.
4. If you have allowed documents to be created even if the product code does not exist in Sage, enter the default product code for Taxable and Non-taxable products that is to be allocated to products in **Sage** if the product code does not already exist in **Sage**.

Note: The resulting Sage document will retain the product description from the QuoteWerks document for reference purposes. You can leave the product code fields blank, use the Sage default "S1", "S2", or "S3" codes or provide any other product code that exists in Sage for ConnectIt to use as a default. The document will be created in Sage without the actual product code from the QuoteWerks document.

5. If you have left the product codes fields blank or used the Sage default "S1", "S2" or "S3" codes, then you must also enter the appropriate **Nominal Codes** to be used for the taxable and non-taxable products.
6. By default, **Sales Nominal Code** "4000", **Purchase Nominal Code** "5000" and **Department** "0" are applied to the line items on the appropriate SOP and POP documents. These are typically subsequently overridden when **ConnectIt-Sage** matches the Products from the **QuoteWerks** document to Products in **Sage**. However, the ability to change these settings may be useful to pre-**Sage 50 Accounts 2007** users (where a **Purchase Nominal Code** is not available) or if you use **Service Invoices** and **Service Credits**.
7. Click the **Save** button to retain the settings on the **Products** tab.

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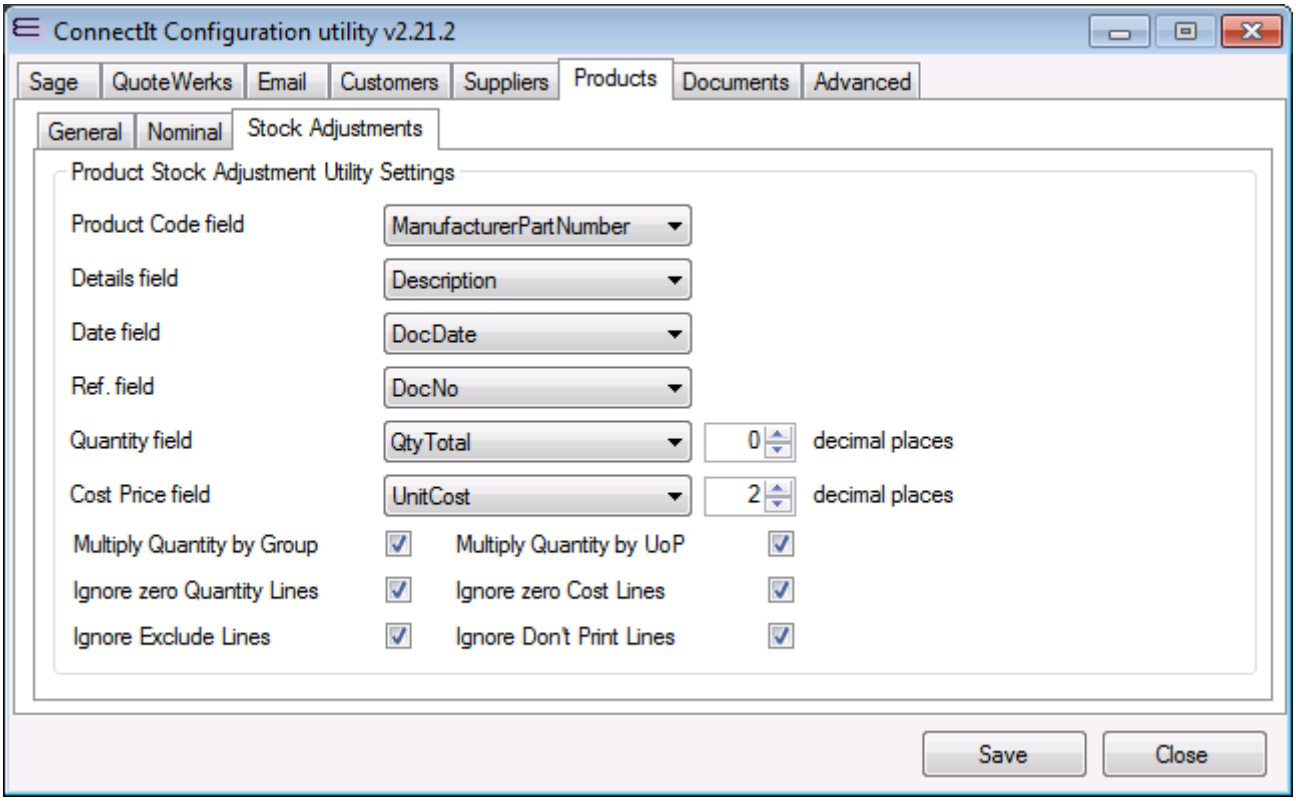
Product Settings (Stock Adjustments tab)

The **Products | Stock Adjustments** tab enables fields and settings to be defined for using the **Stock Adjustments** utility.



1. The **Product Code**, **Details**, **Date**, **Ref.**, **Quantity** and **Cost Price field** options enable the selection of which field to use from the **QuoteWerks Document Header** and **Items** fields when populating the **Stock Adjustment** utility grid.

Note that the Product Code, Details, Quantity and Cost Price field options refer to QuoteWerks Document Item fields; Date and Ref. field options refer to QuoteWerks Document Header fields.

2. The **Quantity** and **Cost Price field decimal places** options refer to the number of decimal places that will be used when displaying the fields on the **Stock Adjustment** utility grid.
3. The **Multiply Quantity by Group** option is for **Bundle** (or **Group**) **Products** on the **QuoteWerks Document** and defines whether the **Line Item Quantity** should be multiplied by **Group Quantity** when transposing the information from **QuoteWerks** to the **Stock Adjustment** utility grid.
4. The **Multiply Quantity by UoP** option defines whether the **Line Item Quantity** should be multiplied by **Unit Of Pricing Factor** when transposing the information from **QuoteWerks** to the **Stock Adjustment** utility grid.
5. If ticked, then the **Ignore Zero Quantity** and **Ignore zero Cost Lines** options mean that any **Line Items** on the **QuoteWerks Document** that have a zero **Quantity** or **Cost** (respectively) will not be transposed when populating the **Stock Adjustment** utility grid.
6. If ticked, then the **Ignore Exclude Lines** and **Ignore Don't' Print Lines** options mean that any **Line Items** on the **QuoteWerks Document** that have the **Exclude** or **Don't Print** properties set (respectively) will not be transposed when populating the **Stock Adjustment** utility grid.
7. Click the **Save** button to retain the settings on the **Product (Stock Adjustments)** tab.

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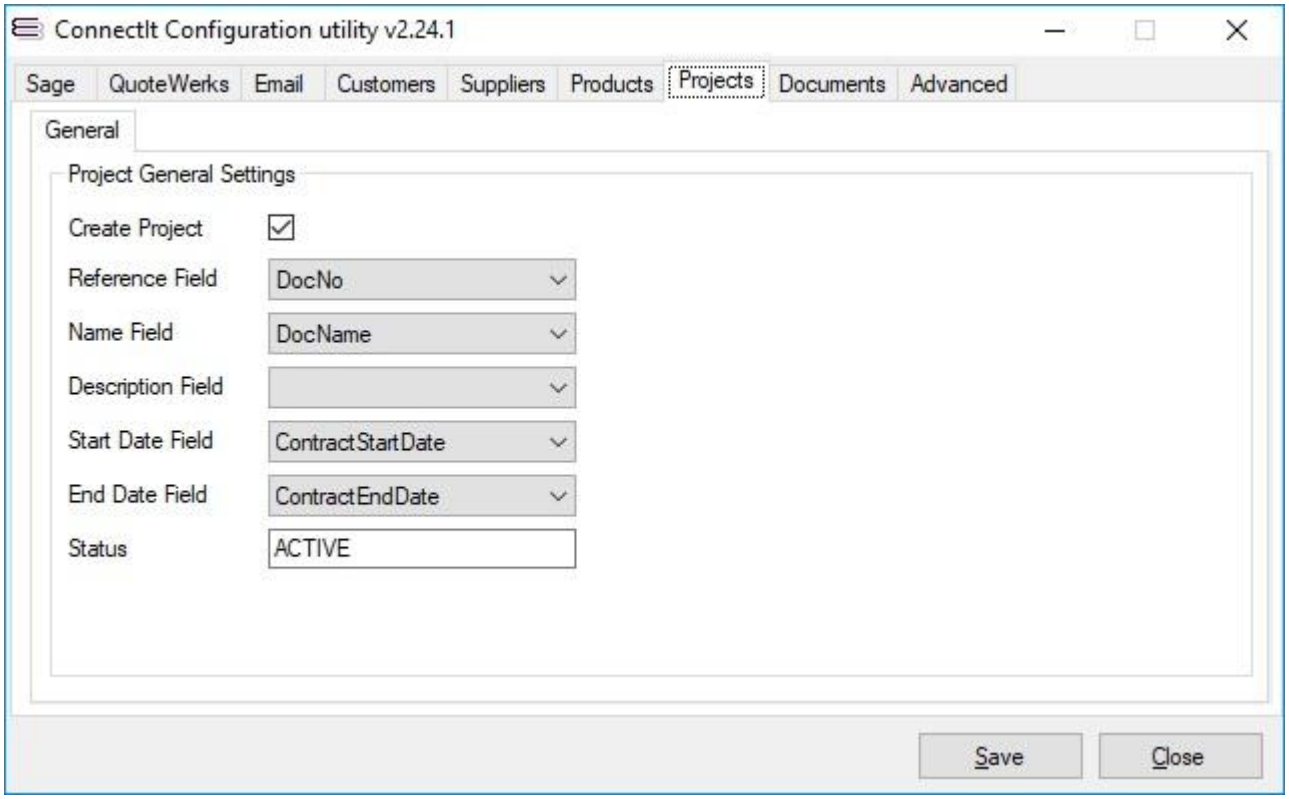
Project Settings

The **Projects** | **General** tab offers options to create a **Project** record in **Sage** alongside the Document Transfer process.



1. If you would like a Project record to be created in **Sage** as part of the Document Transfer process, then tick the **Create Project** option.
2. If the **Create Project** option is ticked, then the other configuration options will become enabled in order for you to select or enter the appropriate values.

Note that the Reference Field, Name Field and Status are mandatory for creating a Project record in Sage. Other field selections may be left blank in the ConnectIt Configuration and Sage will apply default values to these fields when the Project record is created in Sage.

Note that the usual default Status for a Project in Sage is "ACTIVE" but you should check with your Sage System Administrator in order to ensure that this is correct for your particular Sage setup.

Note this feature is designed to be used stand-alone and/or alongside the ConnectIt Document Creation Overrides features. A special case has been created in the Overrides such that if the Sage Override Field is set as "PROJECT_ID", then the ID of the Project created is used. The Sage PROJECT_ID field may be referenced in the Overrides at Sage Purchase Document Header, Sage Purchase Document Item and/or Sage Sales Document Item level.

Note that Sage does not display the Project ID dropdown selection on Sales Order Line Items unless the Product Code is a "S3" Special Service Item.

Note that if the PROJECT_ID field has been referenced as part of the Override Fields, then the Project ID found or created from the Create Project process is used for the Value, i.e. a Value entered into the Configuration would be ignored.

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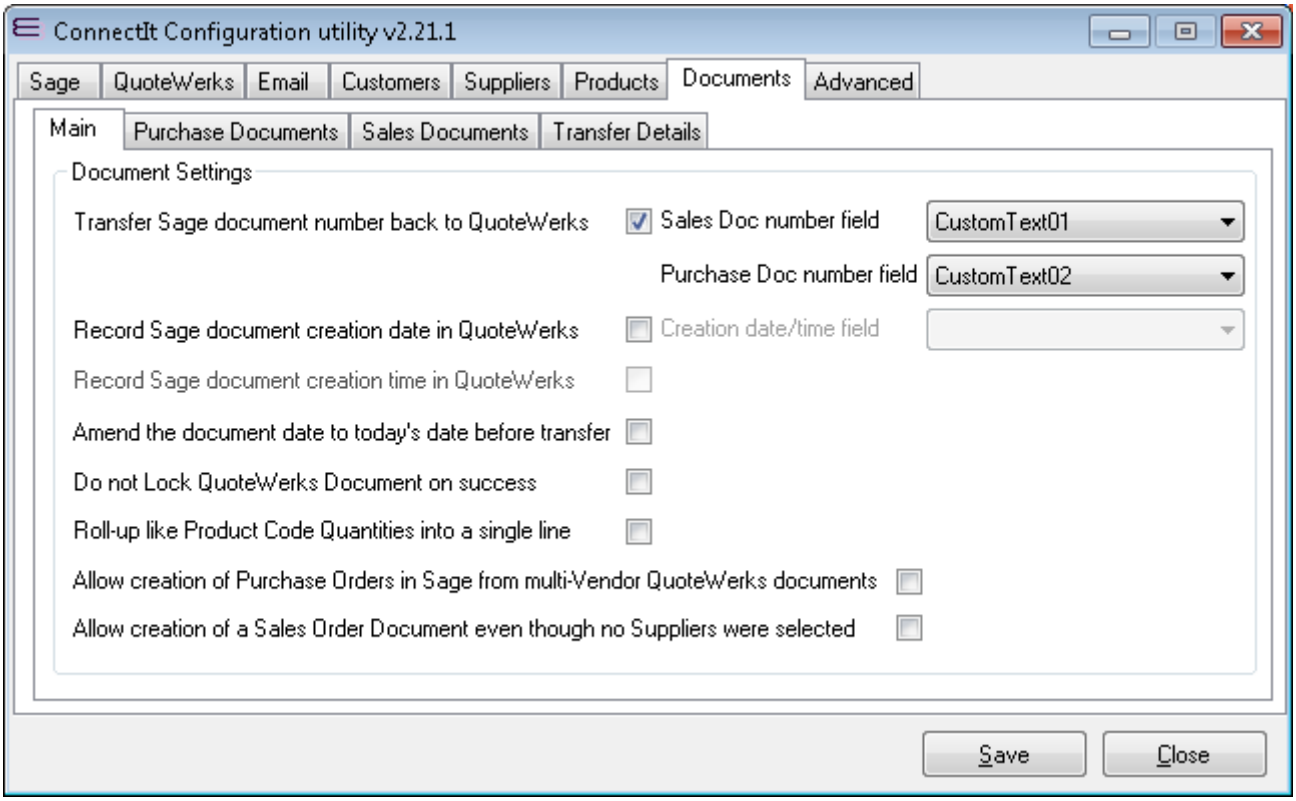
Document Settings (Main tab)

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



1. If you want to retrieve the **Sage 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**, 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.
2. By default, the **Sage Sales Document Number** and/or **Purchase Document Number**(s) will be transferred back into **QuoteWerks' CustomText01** field. If you would prefer these to be transferred back into a different field, click the drop down list to select your preferred choice of the custom fields.

Note: If creating Back-to-Back Sales Order and Purchase Order documents in Sage, then both the Sales Order document number and the Purchase Order document numbers are returned to the specified field separated by a comma in the format "<SO#>, <PO#>".

If creating multiple Purchase Order documents in Sage, then the Purchase Order document numbers are returned to the specified field separated by a comma in the format "<PO1#>, <PO2#>, <PO3#>, etc."

3. If you want to store the date that the **QuoteWerks** document was created in **Sage**, 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** to be stored in. Alternatively, if after transferring the **QuoteWerks** document information to **Sage**, you do not wish the **Sage Document Date** to be stored, un-tick the **Record Sage document creation date in QuoteWerks** tick box.

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4. If you want **ConnectIt** 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** will update the **QuoteWerks** document **Sales Info** tab **Date** field to the current system date before transferring the information from **QuoteWerks** to **Sage**. This will result in both the **QuoteWerks** document and the **Sage** document showing the current date when the transfer has completed successfully.

5. If you would prefer ConnectIt to not lock the QuoteWerks Document once it has transferred the information successfully, then tick the **Do not Lock QuoteWerks Document on success** box.

6. If you want **ConnectIt** to sum the Quantities of Line Items on the **QuoteWerks** document which have the same Product Code into the first instance of that Product Code on the Sage Sales and/or Purchase Document(s), then tick the **Roll-up like Product Code Quantities into a single line** option.

Note: that if the Unit Cost and/or Unit Price of the like Product Code Line Items are different, then the User is prompted and the transfer will fail because this would result in a Document in Sage which has a different total value to that in QuoteWerks.

7. If you want to allow **ConnectIt** 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, then un-tick the box.

8. If you want to allow **ConnectIt** to create a **Sales Order** when no **Vendors** were selected in the list, ensure that the **Allow creation of Sales Order Document even though no Suppliers were selected** box is ticked. Alternatively, if you would prefer **ConnectIt** not to create **Sage** documents from **QuoteWerks** documents when no Suppliers are selected, then un-tick the box.

9. Click the **Save** button to retain the settings on the **Documents (Main)** tab.

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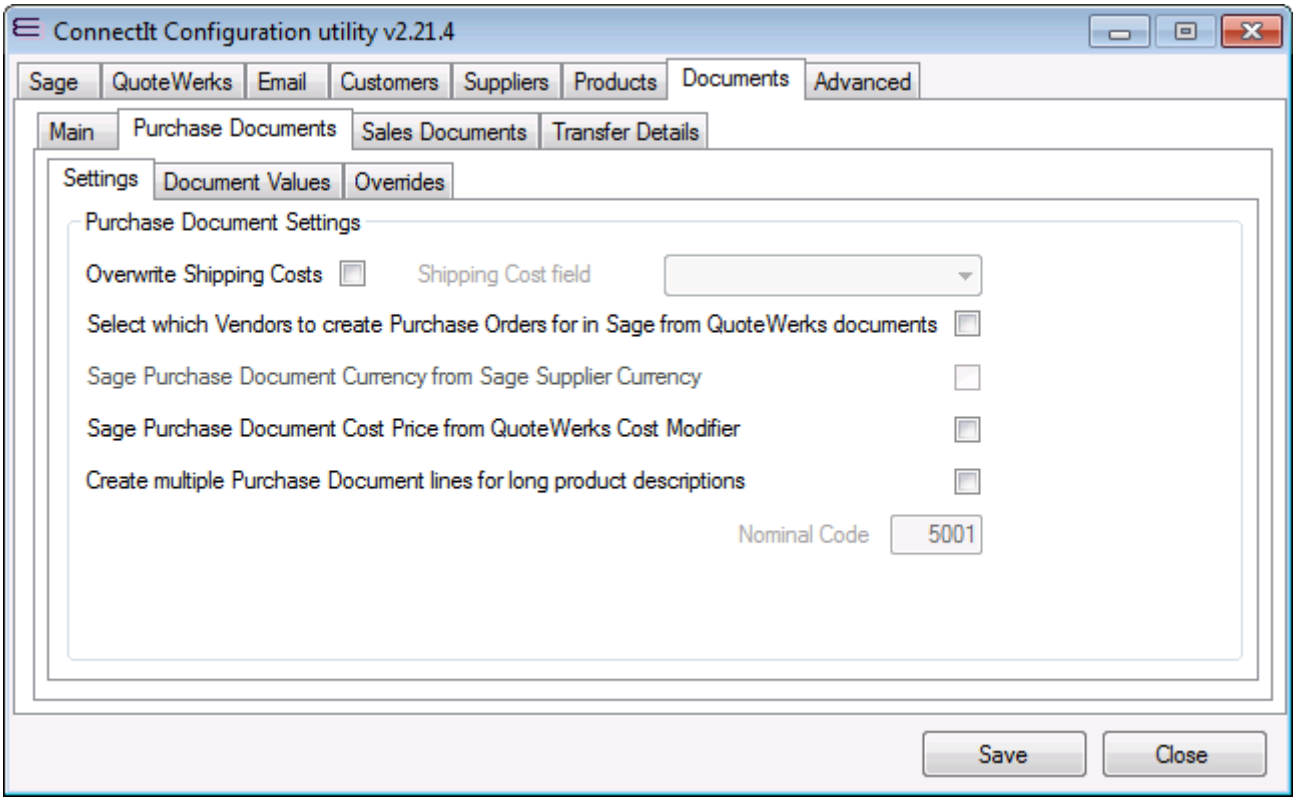
Document Settings (Purchase Documents | Settings tab)

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



1. If you want to import purchase shipping costs from **QuoteWerks** into **Sage**, tick the **Overwrite Shipping Costs** box which will activate the **Shipping Cost field** option and allow the required field to be selected from the drop down list. Activating this option means that **ConnectIt** will read the purchase shipping cost from a **QuoteWerks Document Header** field, instead of summing the **Line Item** shipping cost values.
2. If you want to specify which **Vendors** **ConnectIt** creates **Purchase Orders** for, ensure that the **Select which Vendors to create Purchase Orders for in Sage from QuoteWerks documents** box is ticked. This will enable you to create **Purchase Orders** for selected **Vendors** and not for others. By default this option is not ticked which means that **Purchase Orders** will be automatically created for all **Vendors**.
3. If you want **ConnectIt** to transfer foreign currencies, tick the **Sage Purchase Document Currency from Sage Supplier Currency**. Ticking this option will enable the Purchase Document(s) to be created in **Sage** using the supplier's default currency. If this option is greyed out, tick the Foreign Currency enabled option on the Customers tab.
4. If you have product descriptions in **QuoteWerks** that are longer than the 60 character limit in **Sage's Product Description** field and if you would like the **QuoteWerks** product description to be split over several lines in Sage, then tick the **Create multiple Purchase document lines for long product descriptions** option. This then enables the **Nominal Code** option so that you may set the Nominal Code for these additional Product Description lines.

Note: This option enters the first 60 characters in Sage's Product Description field. Then the remaining description is split into the Details section of a service item(s).

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5. If, when creating Purchase Documents in **Sage**, you want the cost price(s) in **Sage** to be the **List Price**(s) from **QuoteWerks** with any **QuoteWerks Cost Modifier**, ie **D30,** applied to it and showing, in this case, as a 30% discount off the **QuoteWerks List Price** on the line item in **Sage**, then tick the **Sage Purchase Document Cost Price from QuoteWerks Cost Modifier** option as this will re-calculate the cost price(s) on transfer to **Sage**. If this option is not ticked, the discount amount and discount percentage will not be transferred to **Sage**.

6. Click the **Save** button to retain the settings on the **Documents | Purchase Documents | Settings** tab.

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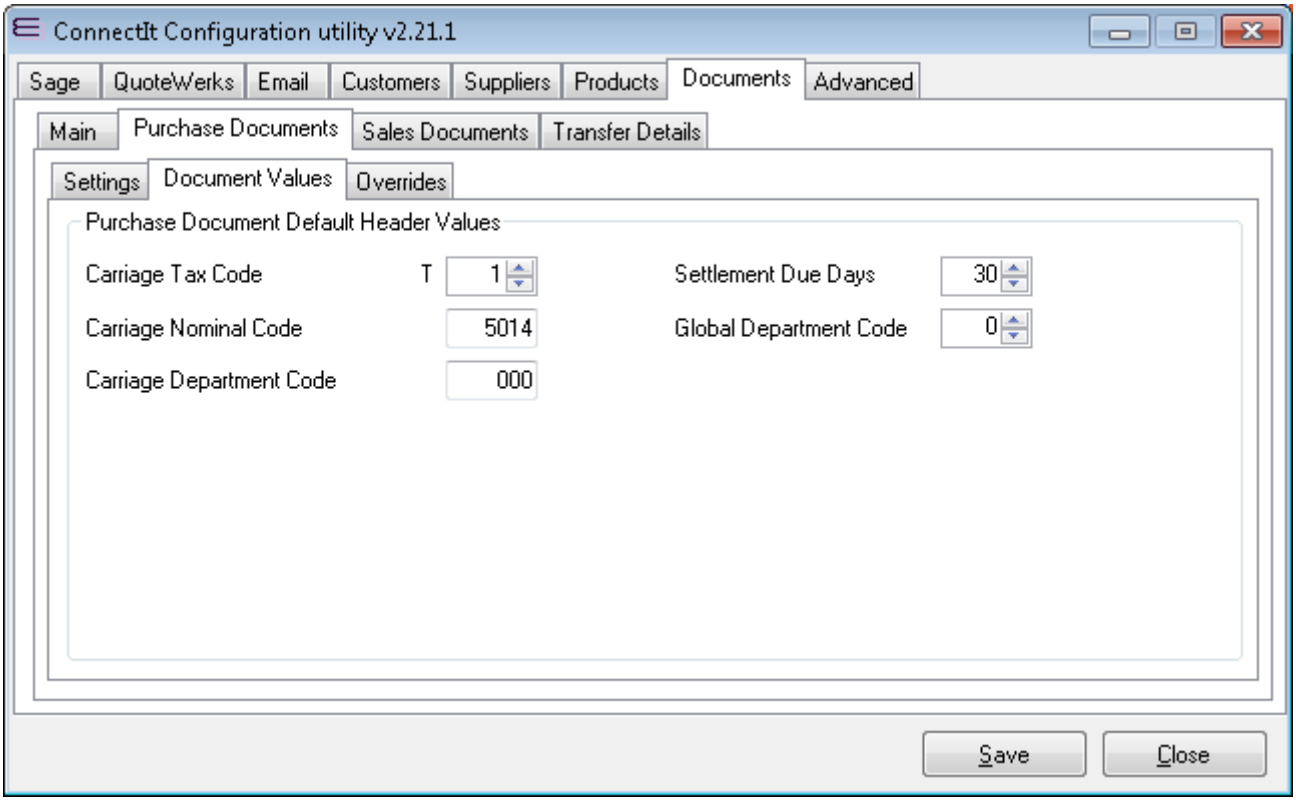
Document Settings (Purchase Documents | Document Values tab)

The **Documents | Purchase Documents | Document Values** tab provides options to force default values into the **Sage** document fields.



1. The **Purchase Document Default Header Values** fields **Carriage Tax Code**, **Carriage Nominal Code**, **Carriage Department Code**, **Settlement Due Days** and **Global Department Code** allow you to change the associated default value assigned to documents when they are created in **Sage**. Different users can have different settings enabling their appropriate codes to be automatically entered when **ConnectIt Creates document(s) in Sage.**

Note on Carriage Tax Codes: In QuoteWerks, if Shipping is taxable then QuoteWerks will calculate the total for the document adding the Shipping Amount (on the Document Items tab) multiplied by the Tax Rate set (on the Sale Info) tab.

This is slightly different to Sage. In Sage, a DIFFERENT Tax Code (and therefore Tax Rate) can be set for items on the main Sage document as compared to the Tax Code for the Carriage.

To handle this scenario, where QuoteWerks effectively supports just the one Tax Rate, ConnectIt understands Shipping is either taxable or non-taxable. The ConnectIt Configuration utility will allow a Tax Rate of "T0" or "T1". If "T0" is selected, then Shipping is deemed to be non-taxable; if "T1" is selected, then Shipping is deemed to be taxable. If "T1" is selected in the ConnectIt Configuration utility, then ConnectIt will apply tax to the Sage document at the same rate as the rest of the document and use the appropriate Tax Code for that Tax Rate when the document is created in Sage.

If a different Tax Code is required in Sage, then any changes must be made manually after the document has been created.

Note on Global Nominal Code: The Global Nominal Code is used to override the nominal codes on individual invoice item lines. For example, if you have more than one item line on an invoice, when you update the invoice an audit trail transaction is created for each item line. If you use the Global Nominal

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Code, then when you update the invoice only one audit trail transaction is created. Please refer to your Sage Help documentation for further details.

Note on Sales Document Defaults | Global Department Code: if this is set to -1 (minus one) then ConnectIt uses the Department Code set in the Customer record in Sage when creating Sales Order, Sales Invoice, Service Invoice, Product Credit or Service Credit Documents in Sage.

2. Click the **Save** button to retain the settings on the **Documents | Purchase Documents | Document Values** tab.

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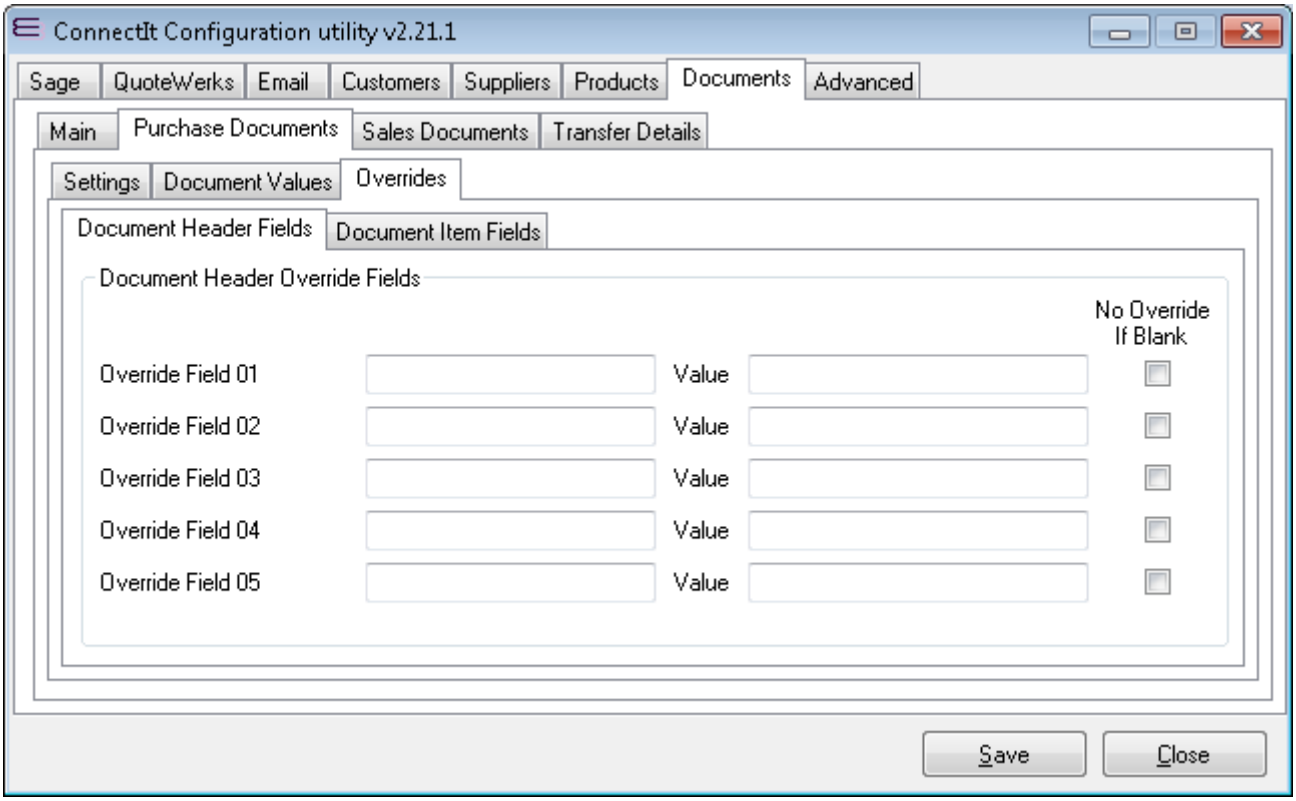
Document Settings (Purchase Documents | Overrides | Document Header Fields tab)

The **Documents | Purchase Documents | Overrides | Document Header Fields** tab enables you to enter your own field mapping requirements from QuoteWerks to Sage 50 Accounts.



1. In the **Override Field(s) 01-05,** enter the **Sage 50 Accounts** field(s), e.g. DEPT_NUMBER, that you wish to be populated with the **QuoteWerks** information which you specify in the associated **Value 01-05** field(s). The Value can either be a macro from QuoteWerks, e.g. &QWDH_CustomText03 or &QWDH_SoldToPONumber etc. or it can be user-defined text that you type into the **Value 01-05** field(s).

ConnectIt-Sage50 supports a number of macros which enable the transfer of different field values from QuoteWerks into Sage 50 Accounts; for full details of the macros available please see the ConnectIt Knowledgebase Article ID 90.

Note 1) It is possible to map any QuoteWerks Document Header or Item field to any Sage 50 Document Header or Item field, provided that the field is available in the respective software API.
Note 2) The underlying Sage 50 field name must be entered.
Note 3) The QuoteWerks &QWDH_ and &QWDI_ macros are used to reference QuoteWerks fields.
Note 4) The ConnectIt advanced macros are used to reference QuoteWerks fields; more details here.
Note 5) If the entered Sage 50 Document field does not exist, then an 'index was outside the bounds of the array' error will occur.
Note 6) If the value in QuoteWerks is not valid for the field type in Sage (e.g. text in a numeric field), then a default value will be applied.

2. The **No Override If Blank** tick box is used if you would rather that **ConnectIt** ignored blank (empty) values from the **QuoteWerks Document**. This is useful if you would like to Override a Sage field in some circumstances, but leave the default value when an override value has not specified in **QuoteWerks**.
3. Click the **Save** button to retain the settings on the **Documents | Purchase Documents | Overrides | Document Header Fields** tab.

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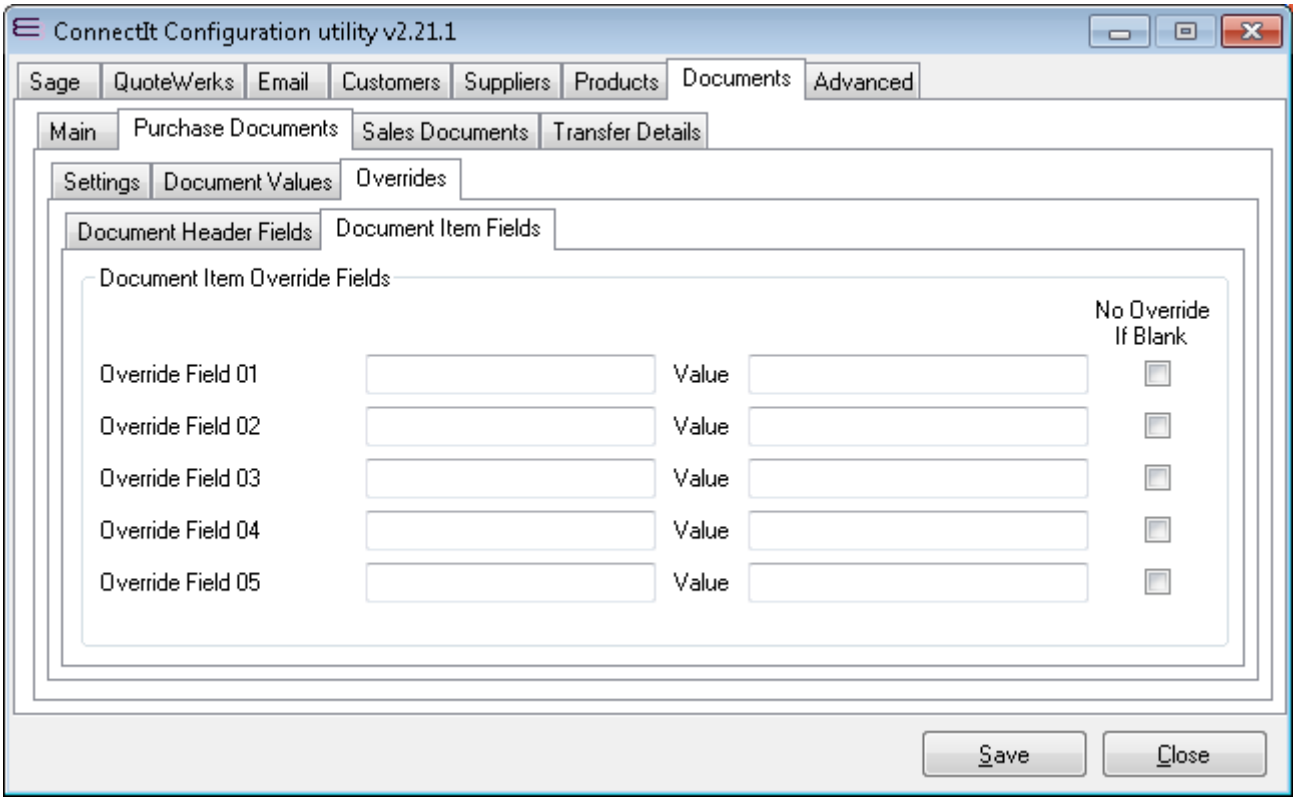
Document Settings (Purchase Documents | Overrides | Document Item Fields tab)

The **Documents | Purchase Documents | Overrides | Document Item Fields** tab enables you to enter your own field mapping requirements from QuoteWerks to Sage 50 Accounts.



1. In the **Override Field(s) 01-05,** enter the **Sage 50 Accounts** field(s), e.g. DEPT_NUMBER, that you wish to be populated with the **QuoteWerks** information which you specify in the associated **Value 01-05** field(s). The Value can either be a macro from QuoteWerks, e.g. &QWDI_CustomText03 or &QWDH_SoldToPONumber etc. or it can be user-defined text that you type into the **Value 01-05** field(s).

ConnectIt-Sage50 supports a number of macros which enable the transfer of different field values from QuoteWerks into Sage 50 Accounts; for full details of the macros available please see the ConnectIt Knowledgebase Article ID 90.

Note 1) It is possible to map any QuoteWerks Document Header or Item field to any Sage 50 Document Header or Item field, provided that the field is available in the respective software API.
Note 2) The underlying Sage 50 field name must be entered.
Note 3) The QuoteWerks &QWDH_ and &QWDI_ macros are used to reference QuoteWerks fields.
Note 4) The ConnectIt advanced macros are used to reference QuoteWerks fields; more details here.
Note 5) If the entered Sage 50 Document field does not exist, then an 'index was outside the bounds of the array' error will occur.
Note 6) If the value in QuoteWerks is not valid for the field type in Sage (e.g. text in a numeric field), then a default value will be applied.

2. The **No Override If Blank** tick box is used if you would rather that **ConnectIt** ignored blank (empty) values from the **QuoteWerks Document**. This is useful if you would like to Override a Sage field in some circumstances, but leave the default value when an override value has not specified in **QuoteWerks**.
3. Click the **Save** button to retain the settings on the **Documents | Purchase Documents | Overrides | Document Item Fields** tab.

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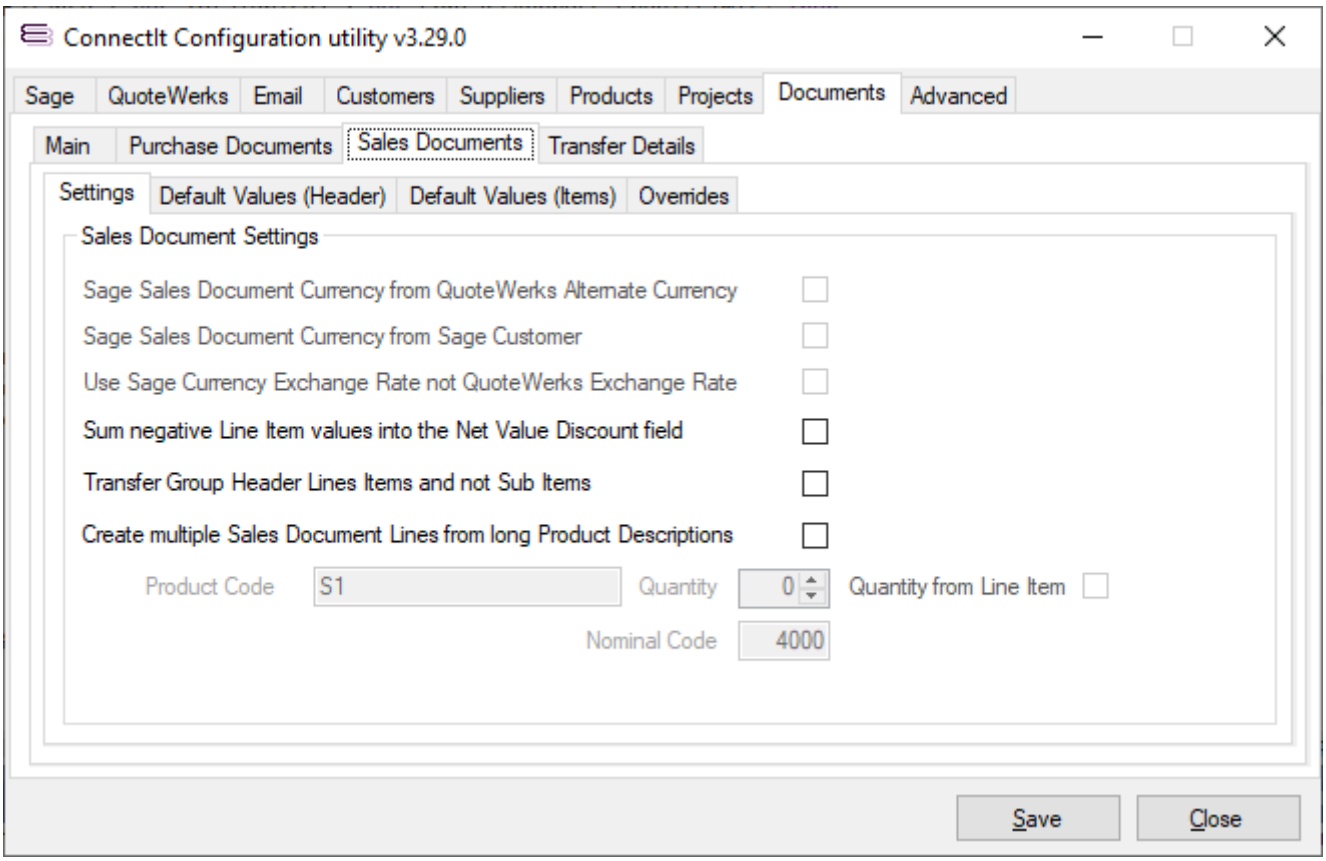
Document Settings (Sales Documents | Settings tab)

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



1. If you want **ConnectIt** to transfer the Sales Document in a foreign currency, then tick either the **Sage Sales Document Currency from QuoteWerks Alternate Currency** or **Sage Sales Document Currency from Sage Customer** option. Ticking one of these options will enable the sales document(s) to be created in **Sage** using the **Alternate Currency** selected on the **QuoteWerks Sale Info** tab or **Sage Customer** record, as appropriate.
2. When transferring foreign currency Documents, if you want ConnectIt to use the Exchange Rate as specified in Sage and not that specified in QuoteWerks, then tick the **Use Sage Currency Exchange Rate not QuoteWerks Exchange Rate** option.

Note that ticking this option may mean that the foreign currency totals between the QuoteWerks Document and Sage Document may not match, i.e. if the Currency Exchange Rate in QuoteWerks is not that same as that in Sage.

3. If you would like to sum negative values on the **QuoteWerks Document** into the **Net Value Discount** field of the **Sage Sales Order** or **Sales Invoice Document**, then tick the **Sum negative Line Item values into the Net Value Discount field** option. This will mean that **QuoteWerks Line Items** with negative values will not be transposed onto the **Sage Document**, instead the value(s) will be added together and the value entered into the **Net Value Discount** field. (Supported on Product Sales Order, Product Invoice and Product Credit Sage Document types.)

Note: this option is only available for Sage 50 Accounts version 18.0 (2012) and above only.

4. If the **Transfer Group Header Lines Items and not Sub Items** option is ticked, then: 1) the **Product Code**(s) specified on the **Group Header Line Items** are checked that they exist in Sage; 2) the **Product Code**(s) specified on the **Product/Service Sub Line Items** are not checked that they exist in Sage; 3)

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Group Header Line Items are transferred onto the Sage document; and 4) **Product/Service Sub Line Items** are not transferred onto the Sage document

Note 1: this option is not available if the Documents tab | Main tab | 'Roll-up like Product Code Quantities into a single line' option is ticked as this could cause a conflict within the Transfer process.
Note 2: if this option is ticked, then Group Header Line Types will be created on the Sage Document as Product Line Items and the option on the Configuration | Documents tab | Transfer Details tab grid will be ignored, i.e. the QuoteWerks Group Header Line Items will be created as Product Lines only and not Message Lines as well.

5. If you have product descriptions in **QuoteWerks** that are longer than the 60 character limit in **Sage's Product Description** field and if you would like the **QuoteWerks** product description to be split over several lines in Sage, then tick the **Create multiple Sales Document Lines from long Product Descriptions** option. This option enters the first 60 characters of the **Description** into **Sage's Product Description** field. The remaining **Description** is split into the **Details** section of a **Sage Service Item** with the specified **Product Code** (default S1), **Quantity** and **Nominal Code**.

Note 1: the Service Item with the relevant Product Code may need to be created in Sage if it does not exist already.
Note 2: if you would like to use the Quantity from the QuoteWerks Document Line Item instead of a fixed value, then tick the 'Quantity from Line Item' option.

6. Click the **Save** button to retain the settings on the **Documents | Sales Documents | Settings** tab.

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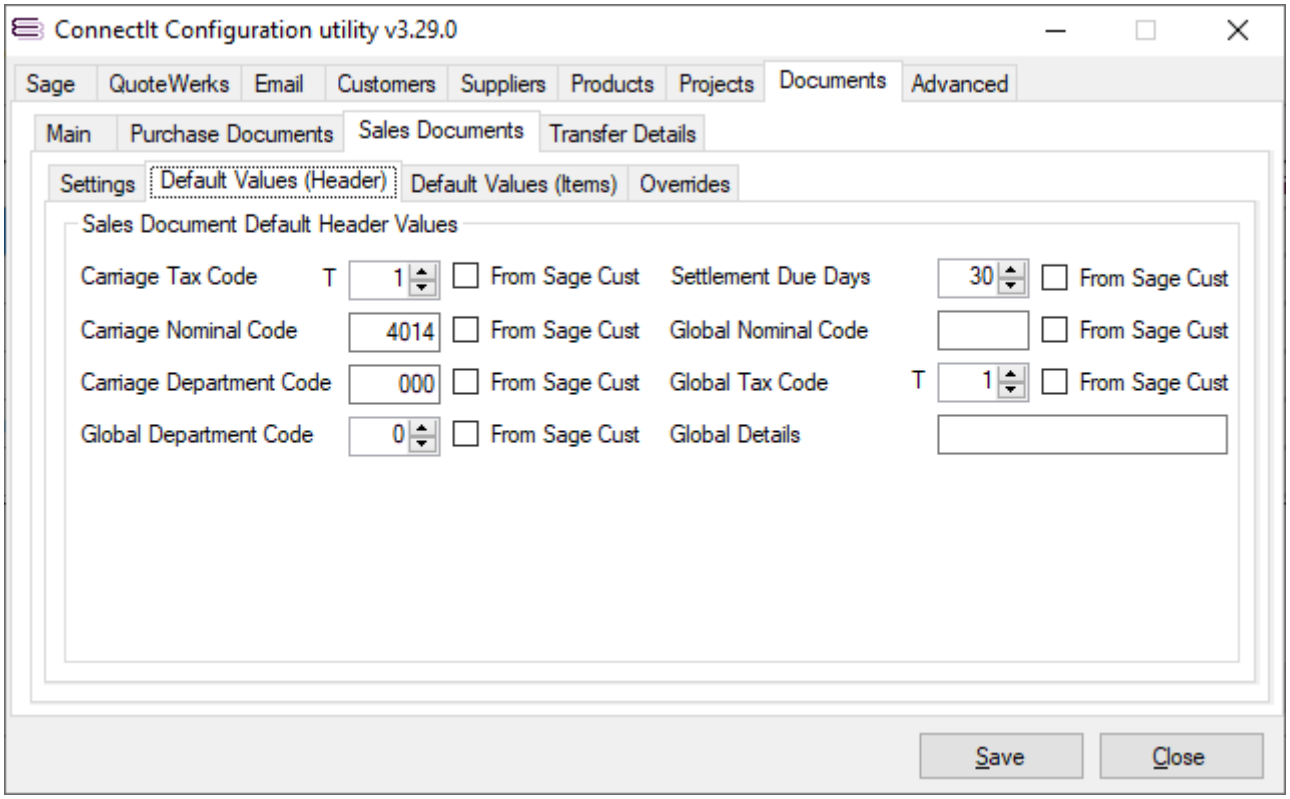
Document Settings (Sales Documents | Default Values (Header) tab)

The **Documents | Sales Documents | Default Values (Header)** tab provides options to force default values into the **Sage** document fields.



1. The **Sales Document Default Header Values** fields **Carriage Tax Code**, **Carriage Nominal Code**, **Carriage Department Code**, **Global Department Code**, **Settlement Due Days**, **Global Nominal Code**, **Global Tax Code** and **Global Details** allow you to change the associated default value assigned to documents when they are created in **Sage**. Different users can have different settings enabling their appropriate codes to be automatically entered when **ConnectIt Creates document(s) in Sage.**

Note on Carriage Tax Codes: In QuoteWerks, if Shipping is taxable then QuoteWerks will calculate the total for the document adding the Shipping Amount (on the Document Items tab) multiplied by the Tax Rate set (on the Sale Info) tab.

This is slightly different to Sage. In Sage, a DIFFERENT Tax Code (and therefore Tax Rate) can be set for items on the main Sage document as compared to the Tax Code for the Carriage.

To handle this scenario, where QuoteWerks effectively supports just the one Tax Rate, ConnectIt understands Shipping is either taxable or non taxable. The ConnectIt Configuration utility will allow a Tax Rate of "T0" or "T1". If "T0" is selected, then Shipping is deemed to be non-taxable; if "T1" is selected, then Shipping is deemed to be taxable. If "T1" is selected in the ConnectIt Configuration utility, then ConnectIt will apply tax to the Sage document at the same rate as the rest of the document and use the appropriate Tax Code for that Tax Rate when the document is created in Sage.

If a different Tax Code is required in Sage, then any changes must be made manually after the document has been created.

Note on Global Nominal Code: The Global Nominal Code is used to override the nominal codes on individual invoice item lines. For example, if you have more than one item line on an invoice, when you update the invoice an audit trail transaction is created for each item line. If you use the Global Nominal

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Code, then when you update the invoice only one audit trail transaction is created. Please refer to your Sage Help documentation for further details.

Note on Sales Document Defaults | Global Department Code: if this is set to -1 (minus one) then ConnectIt uses the Department Code set in the Customer record in Sage when creating Sales Order, Sales Invoice, Service Invoice, Product Credit or Service Credit Documents in Sage.

2. The **From Sage Cust** options indicate that any settings configured here should be overridden by those that are set against the Customer record in **Sage**.
3. Click the **Save** button to retain the settings on the **Documents | Sales Documents | Default Values (Header)** tab.

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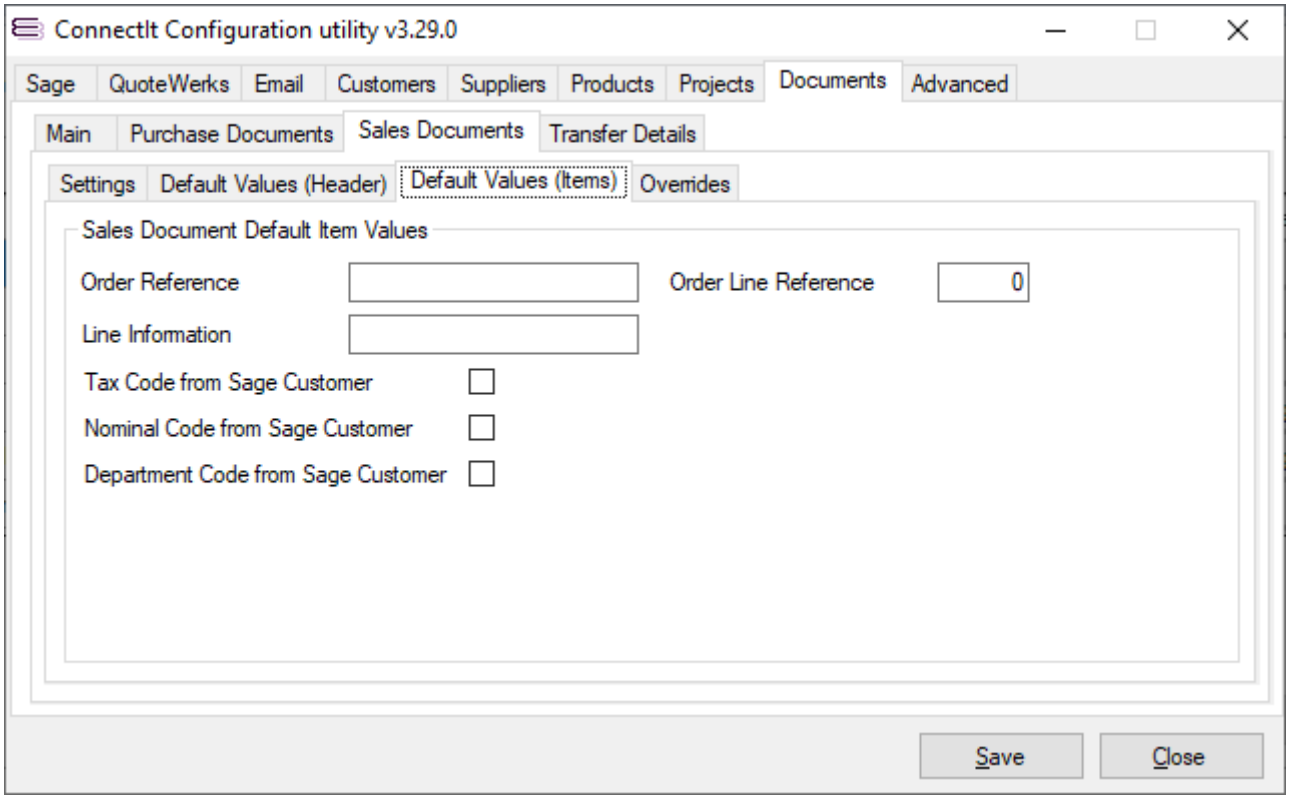
Document Settings (Sales Documents | Default Values (Items) tab)

The **Documents | Sales Documents | Default Values (Items)** tab provides options to force default values into the **Sage** document fields.



1. The **Order Reference** and **Line Information** fields relate to the information that **ConnectIt-Sage** will transfer into the associated **Sage** fields. **ConnectIt-Sage** 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.
2. The **Order Line Reference** field relates to the information that **ConnectIt-Sage** will transfer into the associated **Sage** field.
3. The **From Sage Customer** options indicate that the Line Item settings should be overridden by those that are set against the Customer record in Sage.
4. Click the **Save** button to retain the settings on the **Documents | Sales Documents | Default Values (Items)** tab.

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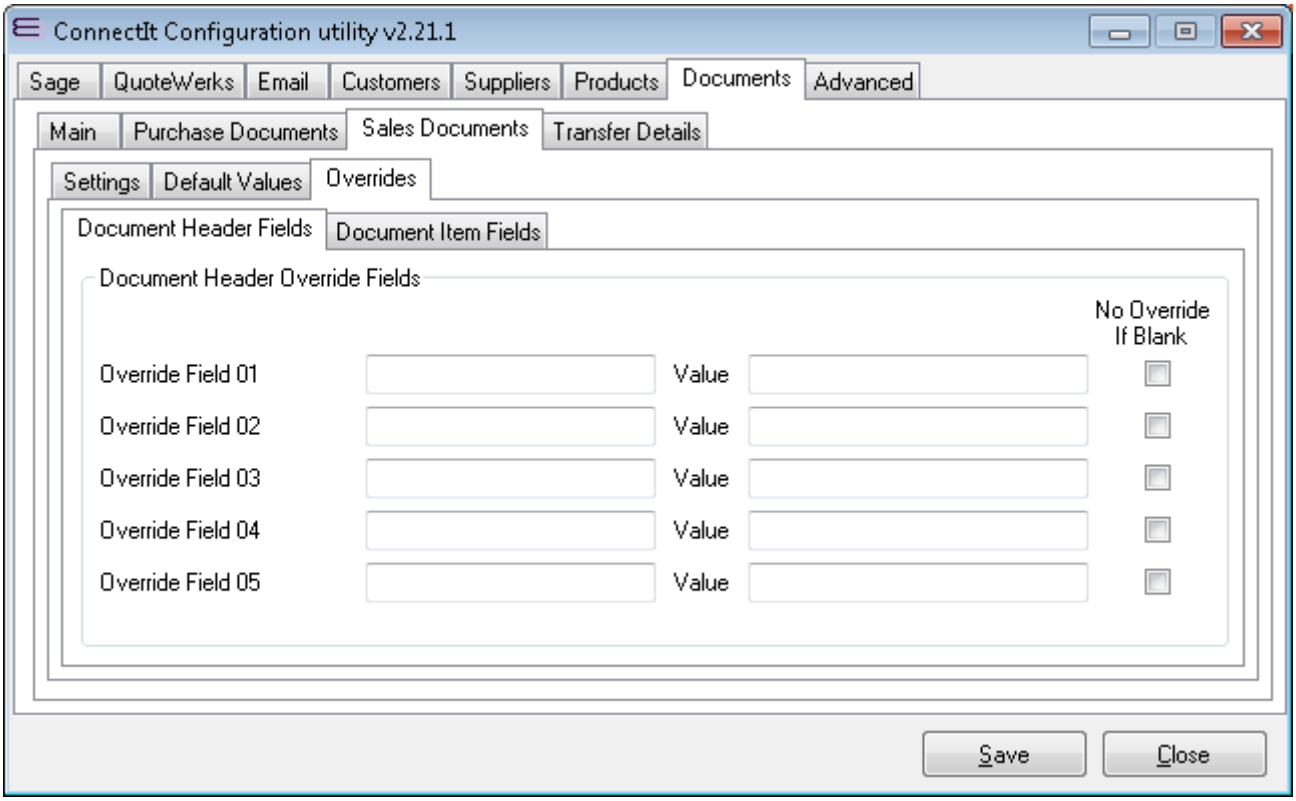
Document Settings (Sales Documents | Overrides | Document Header Fields tab)

The **Documents | Sales Documents | Overrides | Document Header Fields** tab enables you to enter your own field mapping requirements from QuoteWerks to Sage 50 Accounts.



1. In the **Override Field(s) 01-05,** enter the **Sage 50 Accounts** field(s), e.g. CARR_DEPT_NUMBER, that you wish to be populated with the **QuoteWerks** information which you specify in the associated **Value 01-05** field(s). The Value can either be a macro from QuoteWerks, e.g. &QWDH_CustomText03 or &QWDH_SoldToPONumber etc. or it can be user-defined text that you type into the **Value 01-05** field(s).

ConnectIt-Sage50 supports a number of macros which enable the transfer of different field values from QuoteWerks into Sage 50 Accounts; for full details of the macros available please see the ConnectIt Knowledgebase Article ID 90.

Note 1) It is possible to map any QuoteWerks Document Header or Item field to any Sage 50 Document Header or Item field, provided that the field is available in the respective software API.
Note 2) The underlying Sage 50 field name must be entered.
Note 3) The QuoteWerks &QWDH_ and &QWDI_ macros are used to reference QuoteWerks fields.
Note 4) The ConnectIt advanced macros are used to reference QuoteWerks fields; more details here.
Note 5) If the entered Sage 50 Document field does not exist, then an 'index was outside the bounds of the array' error will occur.
Note 6) If the value in QuoteWerks is not valid for the field type in Sage (e.g. text in a numeric field), then a default value will be applied.

2. The **No Override If Blank** tick box is used if you would rather that **ConnectIt** ignored blank (empty) values from the **QuoteWerks Document**. This is useful if you would like to Override a Sage field in some circumstances, but leave the default value when an override value has not specified in **QuoteWerks**.
3. Click the **Save** button to retain the settings on the **Documents | Sales Documents | Overrides | Document Header Fields** tab.

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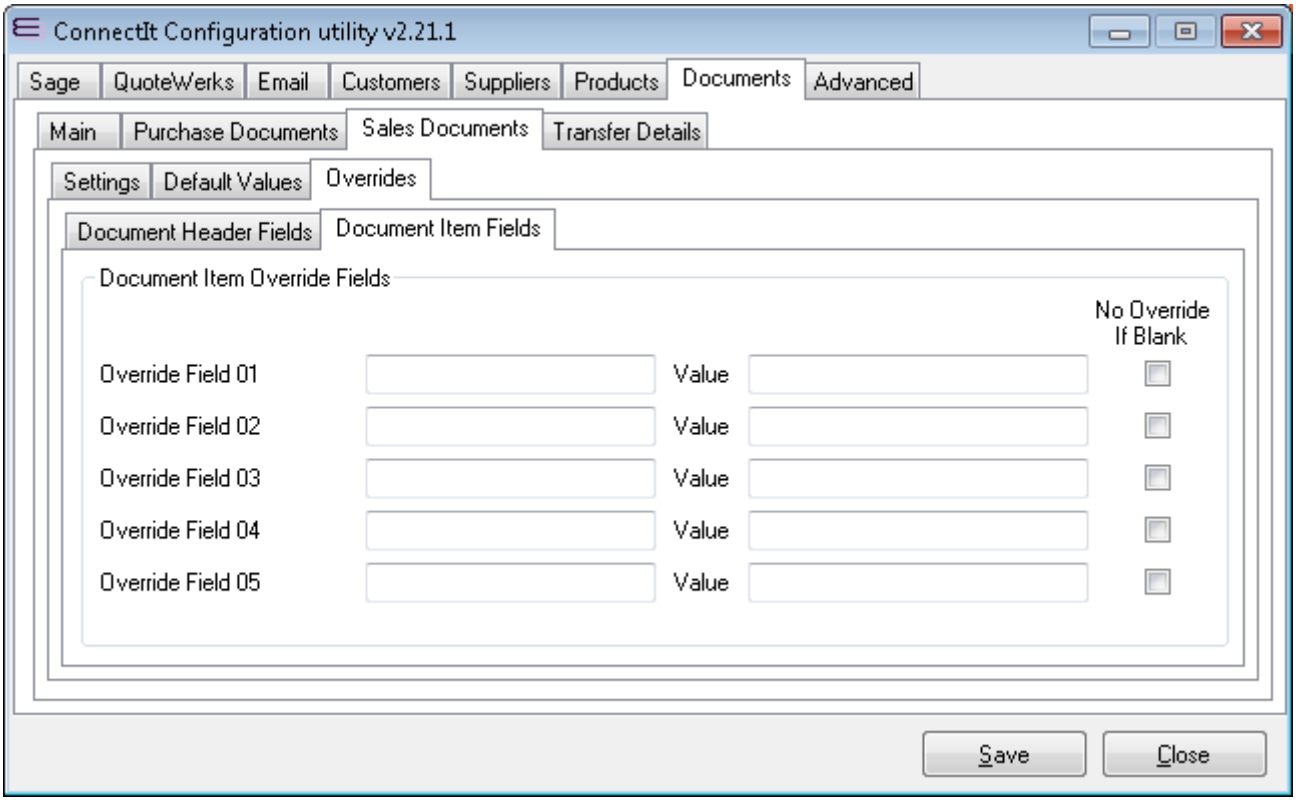
Document Settings (Sales Documents | Overrides | Document Items Fields tab)

The **Documents | Sales Documents | Overrides | Document Items Fields** tab enables you to enter your own field mapping requirements from QuoteWerks to Sage 50 Accounts.



1. In the **Override Field(s) 01-05,** enter the **Sage 50 Accounts** field(s), e.g. DEPT_NUMBER, that you wish to be populated with the **QuoteWerks** information which you specify in the associated **Value 01-05** field(s). The Value can either be a macro from QuoteWerks, e.g. &QWDI_CustomText03 or &QWDH_SoldToPONumber etc. or it can be user-defined text that you type into the **Value 01-05** field(s).

ConnectIt-Sage50 supports a number of macros which enable the transfer of different field values from QuoteWerks into Sage 50 Accounts; for full details of the macros available please see the ConnectIt Knowledgebase Article ID 90.

Note 1) It is possible to map any QuoteWerks Document Header or Item field to any Sage 50 Document Header or Item field, provided that the field is available in the respective software API.
Note 2) The underlying Sage 50 field name must be entered.
Note 3) The QuoteWerks &QWDH_ and &QWDI_ macros are used to reference QuoteWerks fields.
Note 4) The ConnectIt advanced macros are used to reference QuoteWerks fields; more details here.
Note 5) If the entered Sage 50 Document field does not exist, then an 'index was outside the bounds of the array' error will occur.
Note 6) If the value in QuoteWerks is not valid for the field type in Sage (e.g. text in a numeric field), then a default value will be applied.

2. The **No Override If Blank** tick box is used if you would rather that **ConnectIt** ignored blank (empty) values from the **QuoteWerks Document**. This is useful if you would like to Override a Sage field in some circumstances, but leave the default value when an override value has not specified in **QuoteWerks**.
3. Click the **Save** button to retain the settings on the **Documents | Sales Documents | Overrides | Document Item Fields** tab.

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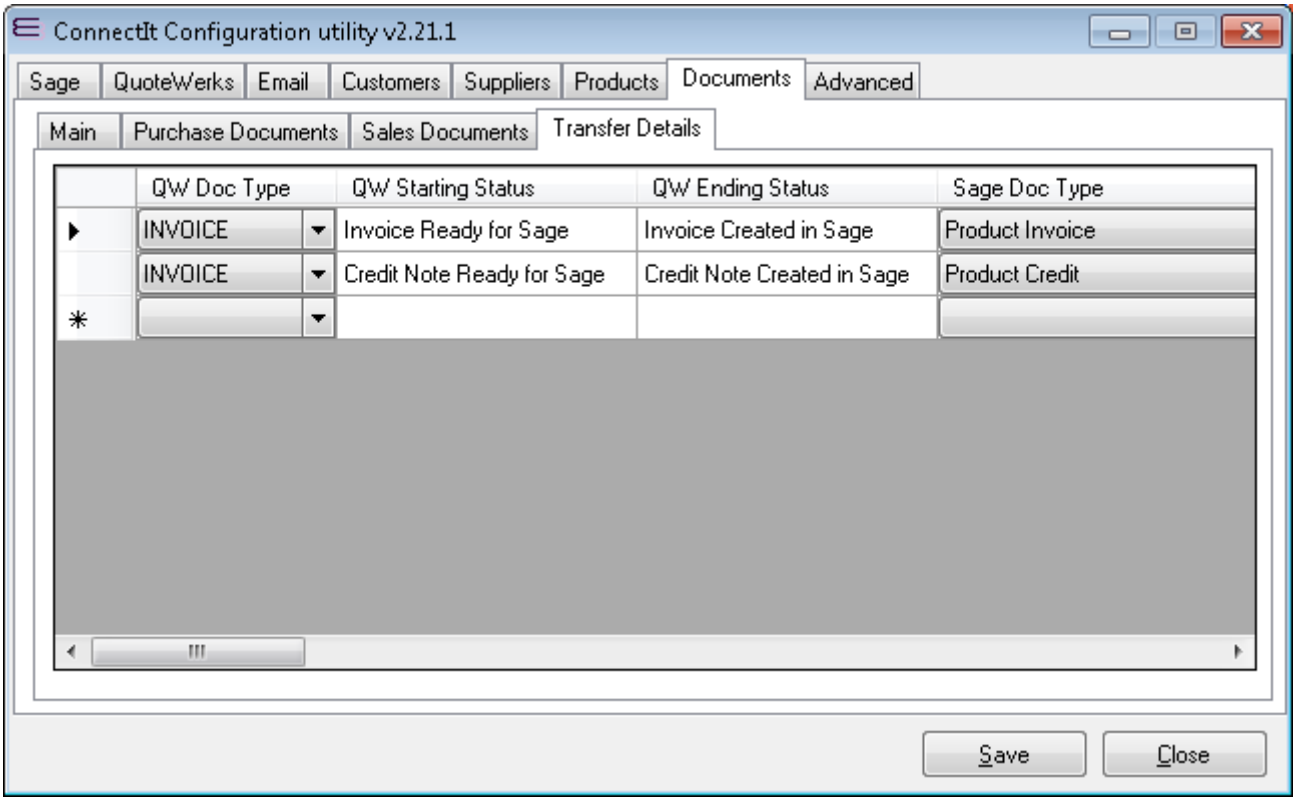
Document Settings (Transfer Details tab)

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



1. The **QW Doc Type** column enables the user to select which **QuoteWerks** document type(s) can be created in Sage. To configure the document type(s) you wish to create in Sage, 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** if they are of a certain status in **QuoteWerks,** i.e. by default an invoice must have a status of **Invoice Ready for Sage** in **QuoteWerks** before it can be created in **Sage**.
3. The **QW Ending Status** column shows the status of the document in **QuoteWerks** after the information has been transferred to **Sage**, i.e. by default a product invoice has its **Status** changed to **Invoice 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** from the **QuoteWerks** document. The document type, i.e. **Product Sales Invoice**, **Product Sales Credit**, etc can be selected from the drop down list box.

And scrolling the grid view columns across to the right…

5. The **+/-** column enables the user to specify whether negative values are being used in **QuoteWerks**. If the box is ticked, **ConnectIt** will change the sign in the corresponding document from plus to minus, or from minus to plus. If the box is not ticked, **ConnectIt** 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 – the document values are negative in QuoteWerks but positive in Sage. 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 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.

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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**. 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**. The **Address** column transfers to the **Sage** Address on the **Details** tab of a document and the **Delivery Address** transfers to the **Sage Delivery Address** on the **Order Details** tab.

For Address: if using the "… & Sage Address" or "… & Sage Delivery Address" options, then ConnectIt uses the SoldTo/ShipTo/BillTo information at first in order to match the Name or Account Reference details with a Customer in Sage. The Contact, Address, Telephone number, etc. details are then read from the relevant Customer record in Sage to then be written to the document(s) being created in Sage.

For Delivery Address: if using the Sage Address or Sage Delivery Address options, then ConnectIt uses the matching Sage Customer Accounts details found when searching for the Address to then write the Address or Delivery Address fields from that Customer to the document(s) being created in Sage.

Note that if you are using the Sage Delivery Address for either the Address or Delivery Address, then you should ensure that Customers have a default Delivery Address set on the Customer record in Sage.

8. Ticking the **Comment**, **Group Header** and/or **Header** column tick box allows the user to control whether these Line Types are transferred to **Sage** as **Comments**.

9. Ticking the **PO Docs** column tick box allows the user to control whether the **Comment**, **Group Header** and/or **Header** lines are transferred to **Purchase Order** documents as well as **Sales** documents in **Sage**.

Note: When creating Comment lines in Sage, ConnectIt uses the "M" Message Line Product Code with a Description from the same QuoteWerks line item field as that selected for the Products (see Products tab, Product Description field selection).

10. Ticking the **Stop Exclude** column enables the user to prevent **Exclude Line** types from the **QuoteWerks** document being transferred across to the **Sage** document.

11. 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** 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 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 does not transfer the line.

12. The **Sales Doc Notes 1-3** fields relate to the information that **ConnectIt-Sage** will transfer into the **Sage** document **Notes 1-3** fields. By default, this is the **QuoteWerks Document Number** (**Notes 1**) and **Document Name** (**Notes 2**). **ConnectIt-Sage** 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.

13. The **Sales Doc Ref** field relates to the information that ConnectIt-Sage will transfer into the **Sage** Sales document **Payment Ref** field. By default, no information is transferred. **ConnectIt-Sage** 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 **ConnectIt Knowledgebase** article 90.

14. The **Purchase Doc Notes 1-3** fields relate to the information that **ConnectIt-Sage** will transfer into the **Sage** document **Notes 1-3** fields. By default, this is the **QuoteWerks Document Number** (**Notes 1**) and **Document Name** (**Notes 2**). **ConnectIt-Sage** supports a number of macros to allow configuration to transfer a number of different Document Headers and Document Items field values across from **QuoteWerks**; for full details of the macros available please see **ConnectIt Knowledgebase** article 90.

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15. The **Purchase Doc Ref** field relates to the information that ConnectIt-Sage will transfer into the **Sage** Purchase document(s) **Ref** field. By default, no information is transferred. **ConnectIt-Sage** supports a number of macros to allow configuration to transfer a number of different Document Headers and Document Items field values across from **QuoteWerks**; for full details of the macros available please see the **ConnectIt Knowledgebase** article 90.

16. The **Comment 1-2** fields relate to the information that **ConnectIt-Sage** will transfer into the **Sage** document line items **Comment 1** and **Comment 2** fields. By default, no information is transferred. **ConnectIt-Sage** supports a number of macros to allow configuration to transfer a number of different Document Headers and Document Items field values across from **QuoteWerks**; for full details of the macros available please see the **ConnectIt Knowledgebase** article 90.

17. Click the **Save** button to retain the settings on the **Documents (Transfer Details)** tab.

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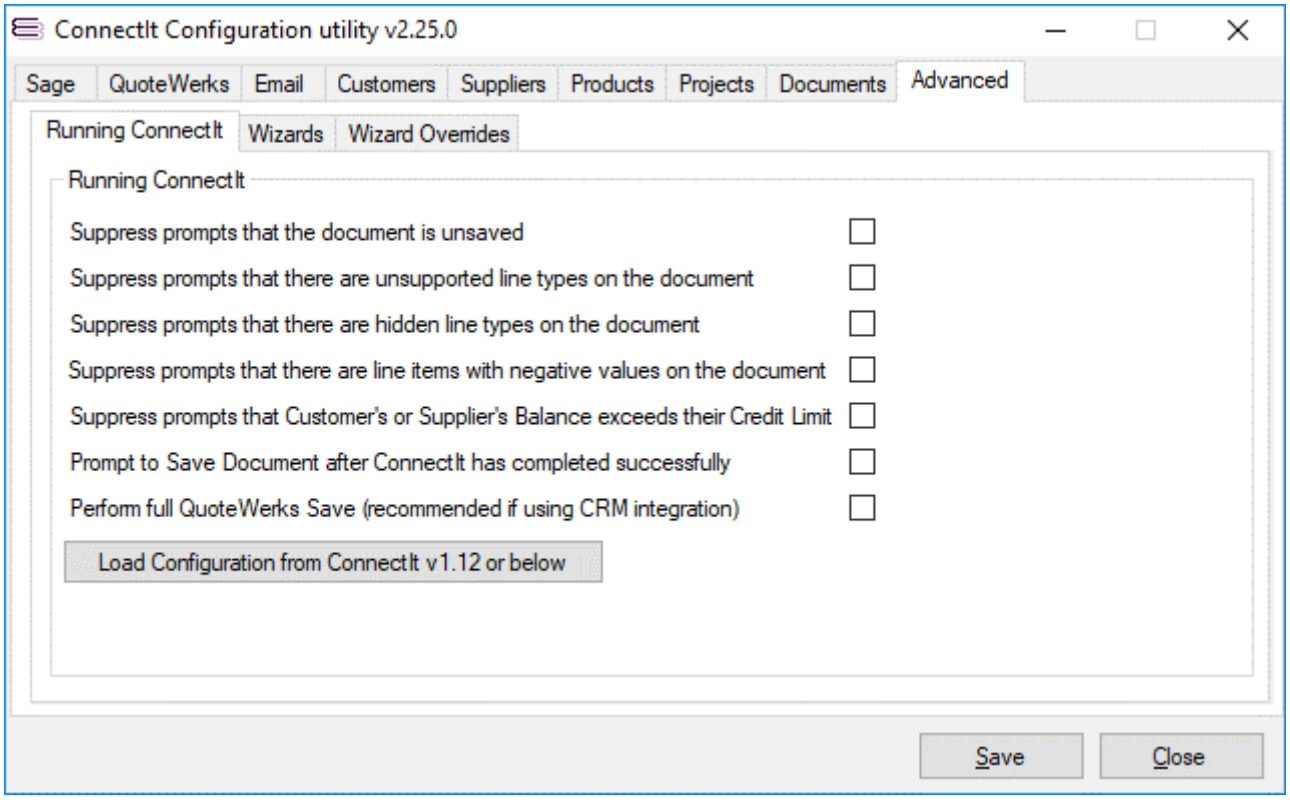
Advanced Settings (Running ConnectIt tab)

The **Advanced | Running ConnectIt** tab provides options to suppress the warning messages that the **ConnectIt** 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**.



1. When transferring **QuoteWerks** document information into **Sage**, you will be prompted by **ConnectIt** if the current document is unsaved. If you would prefer not to be prompted, then tick the box to suppress the prompt(s).
2. When transferring **QuoteWerks** document information into **Sage**, you will be prompted by **ConnectIt** if the current document contains unsupported line types. If you would prefer not to be prompted, then tick the box to suppress the prompt(s).
3. When transferring **QuoteWerks** document information into **Sage**, you will be prompted by **ConnectIt** if the current document contains hidden line types. If you would prefer not to be prompted, then tick the box to suppress the prompt(s).
4. When transferring **QuoteWerks** document information into **Sage**, you will be prompted by **ConnectIt** if the current document has line items with negative values. If you would prefer not to be prompted, then tick the box to suppress the prompt(s).
5. When transferring **QuoteWerks** document information into **Sage**, you will be prompted by **ConnectIt** if the **Customer** or **Supplier Balance** in **Sage** is non-zero and exceeds their **Credit Limit**. If you would prefer not to be prompted, then tick the box to suppress the prompt(s).
6. If you would like to be prompted to Save the Document after ConnectIt has completed, then tick the **Prompt to Save Document after ConnectIt has completed successfully** box.
7. When prompted to Save the Document, if you would like a "full" Save (i.e. one with the QuoteWerks Save dialog where you can choose options to create/update various items in your integrated contact manager) then tick the **Perform full QuoteWerks Save** box.

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8. When updating **ConnectIt** to the latest version (from version 1.12 or below), if you are an existing **ConnectIt** user and would like to retrieve your existing Configuration settings, then click the **Load Configuration from ConnectIt v1.12 or below** button. If you would prefer use ConnectIt's default settings and not retrieve your existing configuration settings, do not click this button.

9. Click the **Save** button to retain the settings on the **Advanced (Running ConnectIt)** tab.

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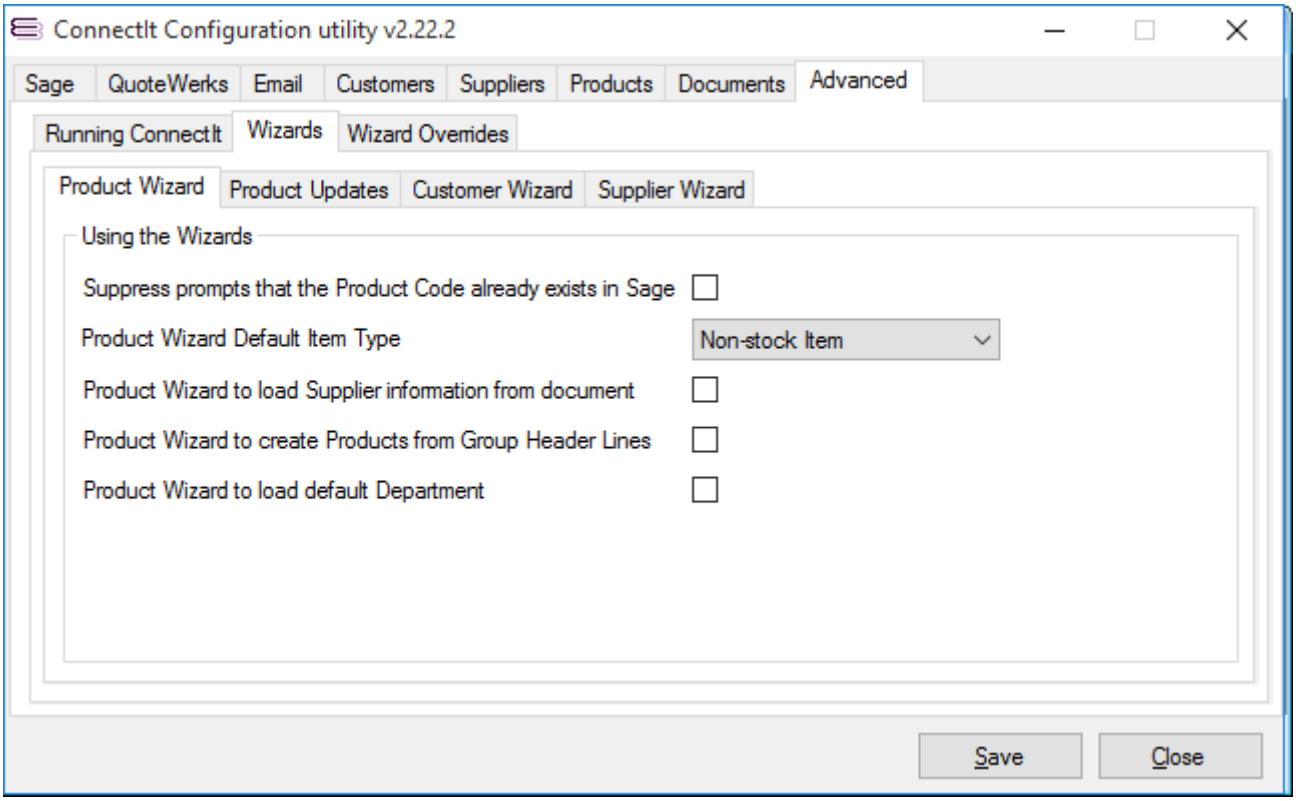
Advanced Settings (Wizards | Products Wizard tab)

The **Advanced | Wizards | Products Wizard** tab provides options to be included when the Product Wizard utility is run.



1. When transferring **QuoteWerks** product information into **Sage**, you will be prompted by the **ConnectIt Create Product Wizard** if a Product Code(s) already exists in **Sage**. If you would prefer not to be prompted, then tick the box to suppress the prompt(s).
2. The **Product Wizard Default Item Type** allows you to select whether the **ConnectIt Create Product Wizard** open with a “Stock Item”, “Non-stock Item” or “Service Item” **Item Type**.
3. If when creating products in **Sage,** you would like the **ConnectIt Create Product Wizard** to load supplier information from the Vendor name field in the **QuoteWerks** document, then tick the **Product Wizard to load Supplier information from document** box.
4. If you would like products in **Sage** to be created from **QuoteWerks Group Header Line Items** as well as **Product/Service Line Items**, then tick the **Product Wizard to create Products from Group Header Lines** option.
5. If when creating products in **Sage,** you would like the **ConnectIt Create Product Wizard** to load the default Department from the **ConnectIt Configuration utility**’s Products tab, then tick the **Product Wizard to load default Department** box.

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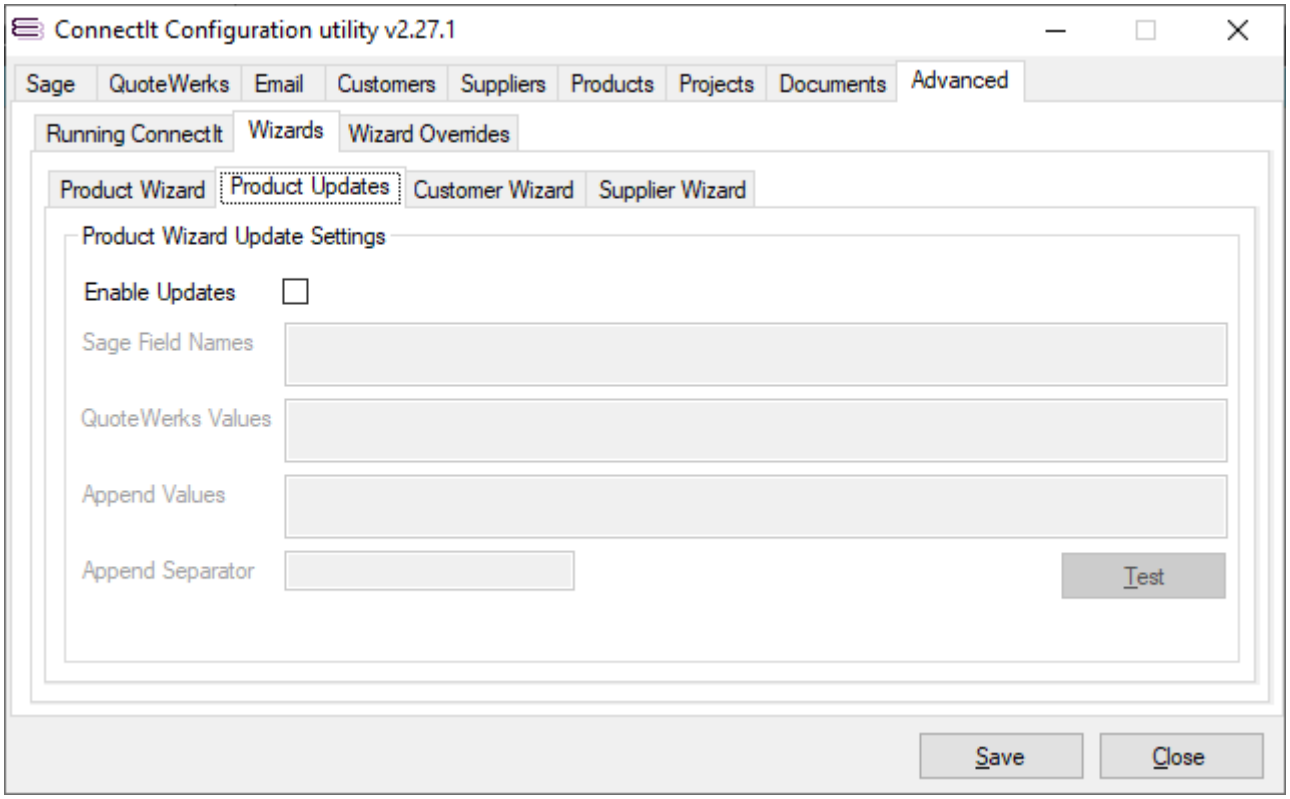
Advanced Settings (Wizards | Product Updates tab)

The **Advanced | Wizards | Product Updates** tab provides options to be included when the Product Wizard utility is run.



1. To allow the **Product Wizard** to not only create new Products but also to update existing Products, tick the **Enable Updates** checkbox.

Note: this feature was introduced into ConnectIt-Sage50 in v2.22.2 and in the absence of this option being ticked, then the ConnectIt Product Wizard will prompt the User that the Product already exists.

2. Once the **Enable Updates** option is ticked, then this will allow **Sage Field Names**, **QuoteWerks Values** and **Append Values** to be entered. **Sage Field Names** are the underlying database field names for the **Sage Stock Item** table such as DESCRIPTION, SALES_PRICE and SUPPLIER_PART_NUMBER.; **QuoteWerks Values** are any **Document Header** (&QWDH_ macros), **Document Items** (&QWDI_ macros) or fixed hard-coded value that you would like ConnectIt to use. **Append Values** should be a pipe-separated list of "True" of "False" settings to indicate whether the **QuoteWerks Value** should be appended to the **Sage Field** (set "True") or overwrite it (set "False").

Note: each Field Name and Value should be separated by a pipe ("|") character.

3. Once the **Sage Field Names**, **QuoteWerks Values** and **Append Values** settings have been entered, then use the **Test** button to check that the same number of pipe-separated values have been entered into each textbox. If there is a discrepancy, then you will be prompted with the difference to correct the issue.
4. Click the **Save** button to retain the settings on the **Advanced (Wizards | Product Updates)** tab.

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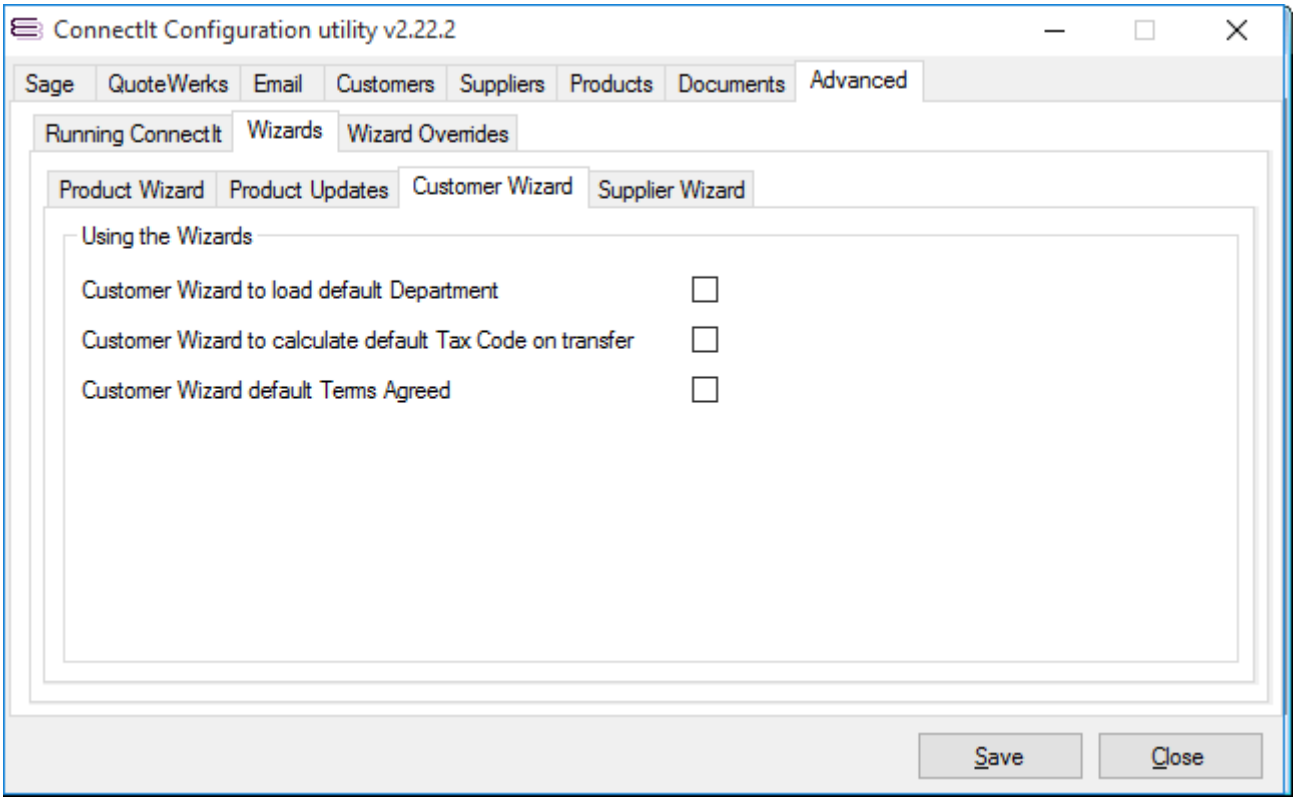
Advanced Settings (Wizards | Customer Wizard tab)

The **Advanced | Wizards | Customer Wizard** tab provides options to be included when the Customer Wizard utility is run.



1. If when creating customers in **Sage** you would like the **ConnectIt Create Customer Wizard** to load the default Department from the **ConnectIt Configuration utility**'s Customers tab, then tick the **Customer Wizard to load default Department** box.
2. If when creating customers in **Sage**, you would like the **ConnectIt Create Customer Wizard** to automatically work out the correct tax code for the customer based on the VAT Number Reference field and the Country entered in the appropriate SoldTo/ShipTo/BillTo Address, then tick the **Customer Wizard to calculate default Tax Code on transfer** box.
3. If when creating customers in **Sage** you would like the **ConnectIt Create Customer Wizard** to tick the **Terms Agreed** field in **Sage** for each new customer by default, then tick the **Customer Wizard default Terms Agreed** box.
4. Click the **Save** button to retain the settings on the **Advanced (Wizards | Customer Wizard)** tab.

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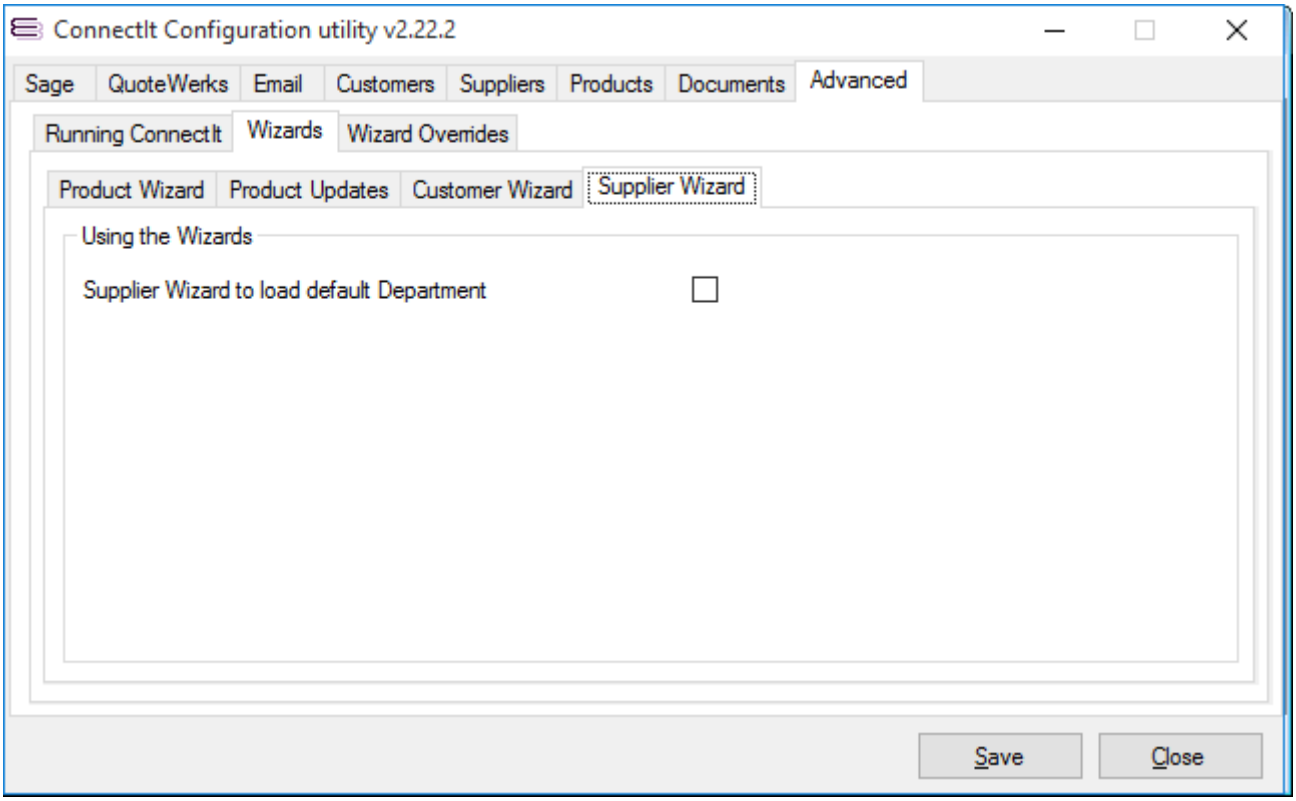
Advanced Settings (Wizards | Supplier Wizard tab)

The **Advanced | Wizards | Supplier Wizard** tab provides options to be included when the Supplier Wizard utility is run.



1. If when creating suppliers in **Sage** you would like the **ConnectIt Create Supplier Wizard** to load the default Department from the **ConnectIt Configuration utility**'s Suppliers tab, then tick the **Supplier Wizard to load default Department** box.
2. Click the **Save** button to retain the settings on the **Advanced (Wizards | Supplier Wizard)** tab.

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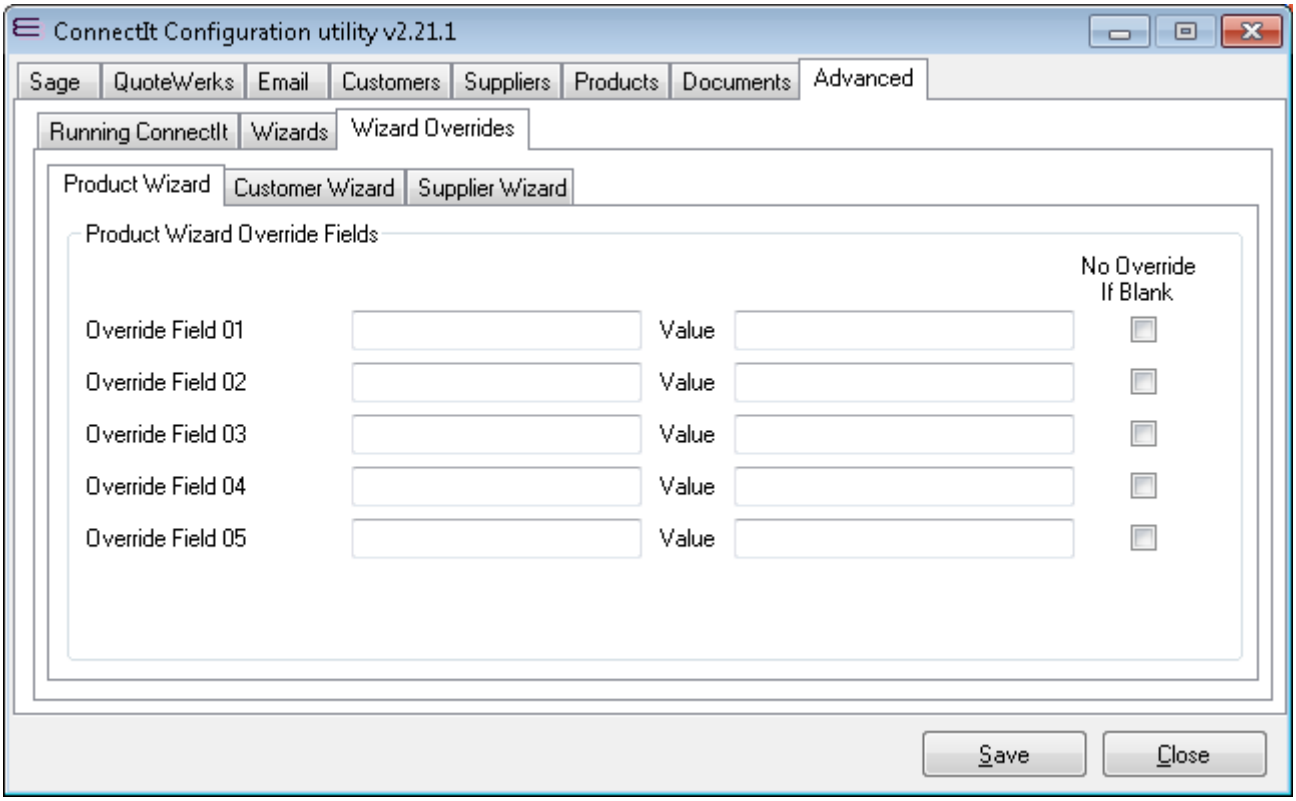
Advanced Settings (Wizard Overrides tab)

The **Advanced | Wizard Overrides** tab enables you to enter your own field mapping requirements from QuoteWerks to Sage 50 Accounts.



1. In the **Override Field 01-05,** enter the ConnectIt Product Wizard control name(s) that you wish to be populated with the **QuoteWerks** information which you specify in the associated **Value 01-05** field(s). The Value can either be a macro from QuoteWerks, e.g. &QWDI_CustomText03 or &QWDH_SoldToPONumber etc. or it can be user-defined text that you type into the **Value 01-05** field(s).

ConnectIt-Sage50 supports a number of macros which enable the transfer of different field values from QuoteWerks into Sage 50 Accounts; for full details of the macros available please see the ConnectIt Knowledgebase Article ID 90.

Note 1) The QuoteWerks &QWDH_ and &QWDI_ macros are used to reference QuoteWerks fields.
Note 2) If the ConnectIt Product Wizard control name does not exist, then the override is ignored.

For further information about ConnectIt Product Wizard control names, please either contact your ConnectIt Reseller or support@connectit-software.co.uk

2. The **No Override If Blank** tick box is used if you would rather that **ConnectIt** ignored blank (empty) values from the **QuoteWerks Document**. This is useful if you would like to Override a Sage field in some circumstances, but leave the default value when an override value has not specified in **QuoteWerks**.
3. Click the **Save** button to retain the settings on the **Advanced | Wizard Overrides** tab.

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