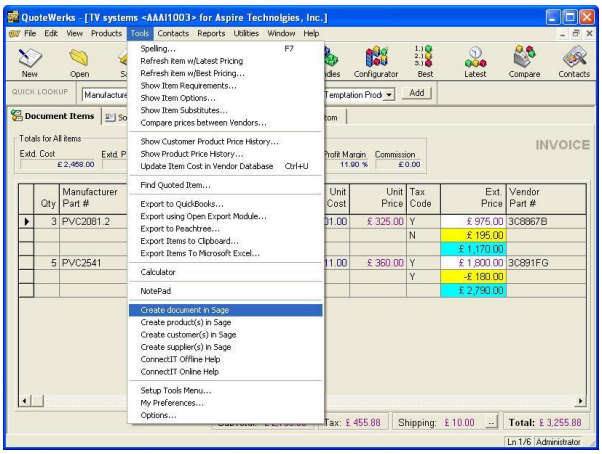
Step-by-Step Guide to Document Creation

The **ConnectIt-Sage** utility provides a way to create documents in **Sage 50 Accounts**. To start the **ConnectIt-Sage** application, you should use the **Create document in Sage** option from the **QuoteWerks |Tools** menu.

Much of the default behaviour described here can be modified using the **ConnectIt-Sage Configuration** utility; please cross-reference this with the **ConnectIt-Sage Step-by-Step Guide to Configuration** to review setup options.

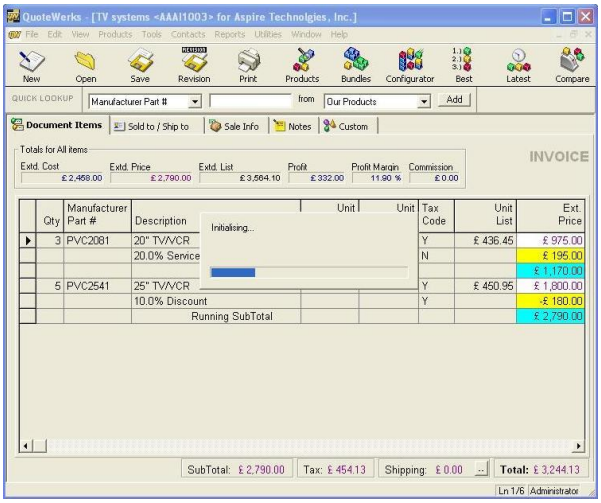
1. Click the **Create document in Sage** option from the **QuoteWerks |Tools** menu.



This starts the **ConnectIt-Sage** application.

2. Initialising…

ConnectIt-Sage is checking the environment setup and registration details.



These steps include:

- Checking that a **QuoteWerks** document reference number was passed into the application.
- Checking that the **ConnectIt Registration** process has been completed successfully.

If there is a problem with the initialisation, you will be prompted and the document is not created in **Sage**.

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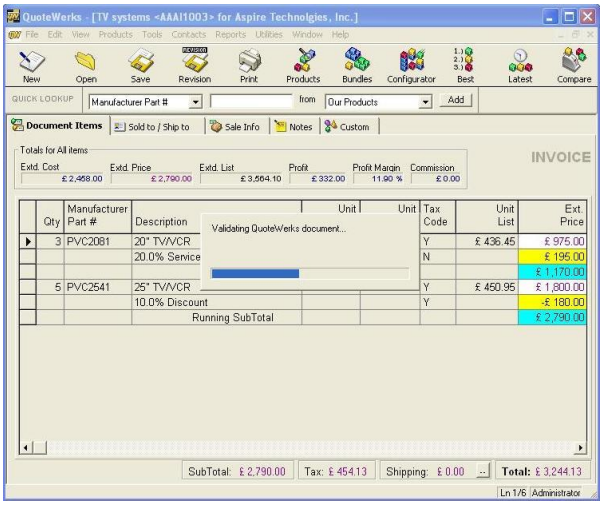
3. Validating QuoteWerks document…



ConnectIt-Sage first checks that a connection can be made to the **QuoteWerks** application running on your computer and that it can read the document that you want to create in **Sage**.

Then **ConnectIt-Sage** checks that the **QuoteWerks** active document **Type** and **Status** are valid, as follows.

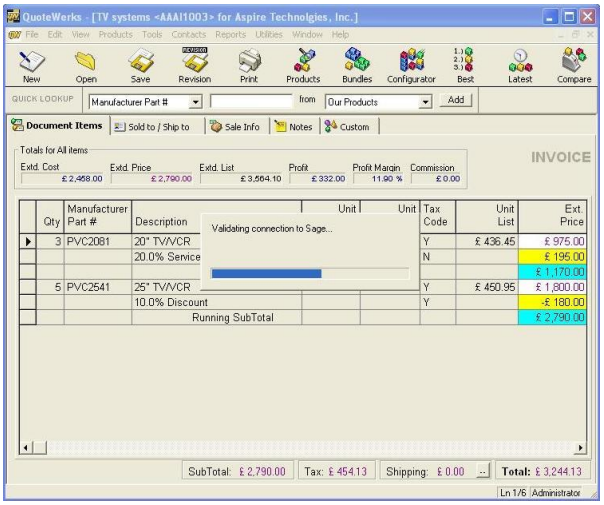
By default in **ConnectIt-Sage** this means that the document must be Type **INVOICE** and have a status of **Invoice Ready for Sage** or **Credit Note Ready for Sage**. These defaults may be modified or additional document type and status combinations added. Please refer to the **ConnectIt-Sage Configuration** utility and documentation for further details.

If the document has a **Type** or **Status** which is not recognised by **ConnectIt-Sage**, then you will be prompted and the document is not created in **Sage.**

Lastly, **ConnectIt-Sage** checks whether the document has changed since it was last saved, i.e. if it is unsaved.

If the document is unsaved, then **ConnectIt-Sage** will prompt you to confirm whether you wish to continue with the transfer to **Sage** or not.

4. Validating connection to Sage…



ConnectIt-Sage checks to make sure that it can connect to the **Sage** accounts.

Depending on how your **ConnectIt-Sage Configuration** has been set up, you may be asked to enter a **Sage Data Objects Logon Name** and **Password**.

If **Sage Data Objects** cannot logon to the **Sage** accounts, then you will be prompted and the document is not created in **Sage**.

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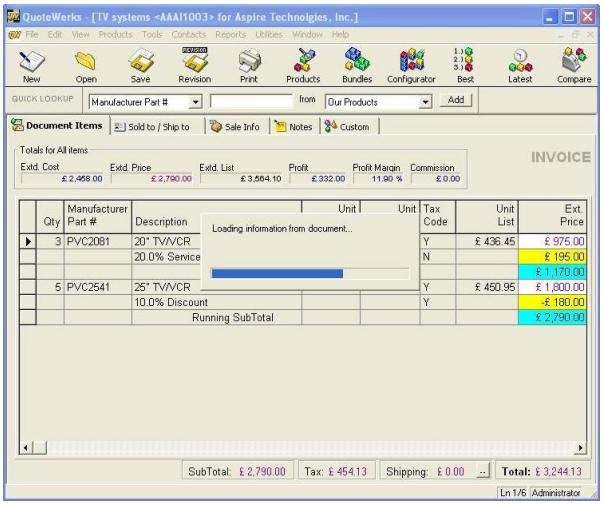
5. Loading information from document…



ConnectIt-Sage reads the relevant information from the current active document in **QuoteWerks**.

You may be prompted about different line types that appear on the **QuoteWerks** document, as follows.

Firstly, because “unsupported” line types appear, i.e. **Sub Totals**, or **Running Sub Totals**. These line types are not added to the **Sage** document.

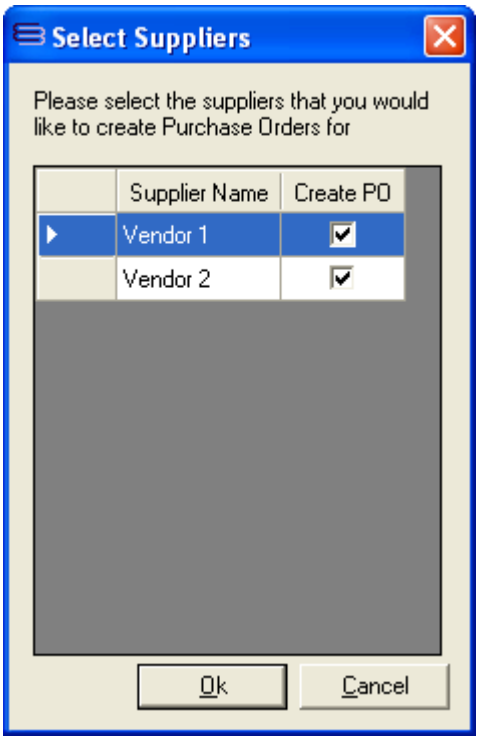
Secondly, because **Exclude** or **Don’t Print** lines appear on the QuoteWerks document. These line types are added to the **Sage** document because a value may be associated with them which affects the total amount of the document.

QuoteWerks Product / Service line types are created as normal lines in the **Sage** document.

Charge and **Discount** line types with VAT are created using the **Sage Non Stock Product Code ‘S1’**.

Non-VAT **Charge** and **Discount** line types are created using the **Sage Non Stock Product Code ‘S2’**.

6. Collating Suppliers to create Purchase Orders for…



If the document being transferred from **QuoteWerks** to **Sage** to create a Purchase Order, and if in the ConnectIt Configuration utility the option has been ticked to **Select which Vendors to create Purchase Orders for in Sage from QuoteWerks documents,** then the Select Suppliers screen will appear, enabling Purchase Orders to be created for all or just selected **Vendors** by ticking or unticking the Create PO box against each Supplier.

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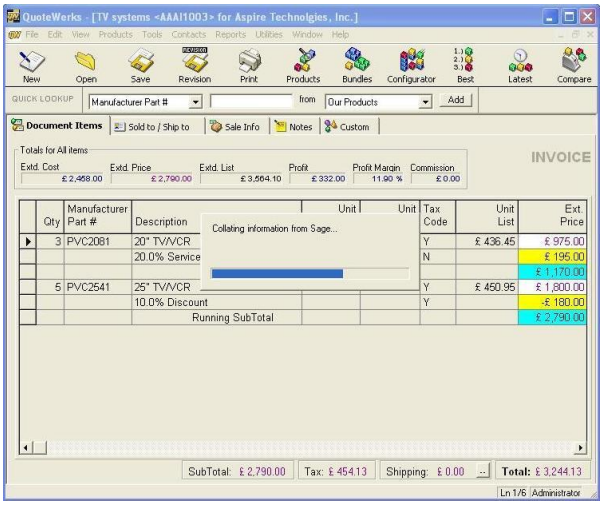
7. Collating information from Sage...



ConnectIt-Sage gets the **Customer Account** and **Product Nominal Code** information from **Sage**.

ConnectIt-Sage attempts to match the **Company** name specified in the **QuoteWerks** document **Bill To** fields to a **Customer** name in **Sage**. If a match is found, then that **Customer Account** is used from Sage. If no match is found, then you will be prompted and the document is not created in **Sage**.

Note: Only the customer's Sage Account reference is used from Sage when creating the Sage document. All other details for the Sage document, i.e. address, contact details, etc are taken from the QuoteWerks document.

If creating **Product Purchase Order** or **Back-to-Back Order** document types in **Sage,** then **ConnectIt** attempts to match the **Company** name specified in the **QuoteWerks** document line item **Vendor** field to a **Supplier** name in **Sage**. If a match is found, then that **Supplier Account** is used from Sage. If no match is found, then you will be prompted and the document is not created in **Sage**.

Note: See ConnectIt-Sage Configuration for options on Vendor address information.

Lastly, **ConnectIt-Sage** attempts to exactly match the **QuoteWerks** document line item **Manufacturer Part Number** to a **Product Code** in **Sage**. If a match is found, then that product's **Nominal Code** is used. If no match is found, then you will be prompted and the document is not created in **Sage**.

Note: Only the product's Nominal Code is used from Sage when creating the Sage document. All other details for the Sage document, i.e. description, price etc. are taken from the QuoteWerks document.

Depending on your company's requirements, the default settings of which fields are used for these processes can be modified. Please refer to the **ConnectIt-Sage Configuration** utility and documentation for further information.

8. Creating Project in Sage...

If the Configuration | Projects tab **Create Project** option has been selected, then the Project record is created in Sage if the Reference used does not already exist.

9. Collating Override information...

The Document Creation process checks for any **Override Fields** which may have been set at Document Header and/or Item level and translates the **Values** ready for writing into **Sage**.

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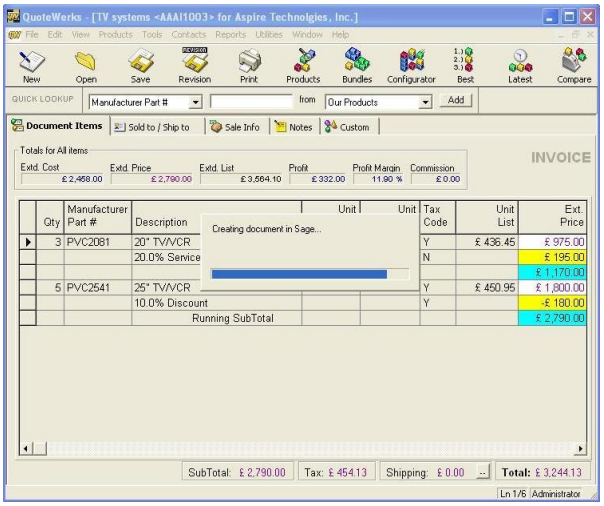
10. Creating document in Sage…

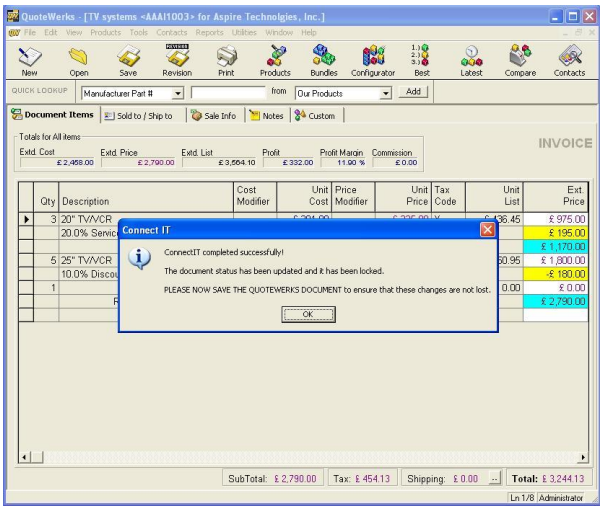
ConnectIt-Sage creates the document in **Sage**!



11. Click OK to complete the **ConnectIt-Sage** program.

ConnectIt tells you that the document was successfully created in **Sage**, that fields on the **QuoteWerks** document have been updated and requests that you now save the **QuoteWerks** document.

Details of the fields that **ConnectIt-Sage** has updated in **QuoteWerks** are covered in the **Notes** section below.



12. ***LASTLY PLEASE NOW SAVE THE QUOTEWERKS DOCUMENT.***

Note: This final step is very important to help avoid creating the document in Sage more than once.

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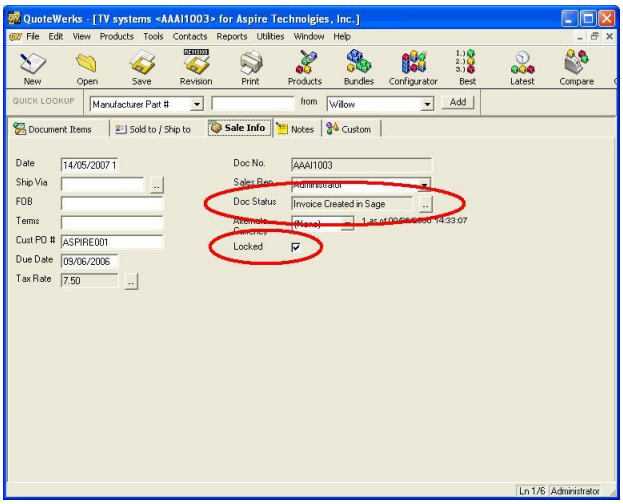
Notes

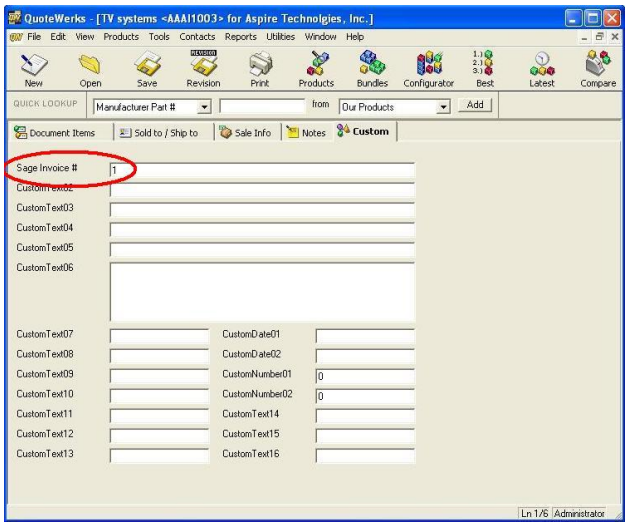
The **QuoteWerks Doc Status** on the **Sale Info** tab field is set to the End Status (as set up in the **ConnectIt-Sage Configuration** utility) and the document is **Locked**.

Once a document has been locked, if a user tries to save changes to a locked document, a dialog box will appear warning the user that the document is locked, and that to save the changes, the user must save the document as a new document.



By default, the **Sage Document Number** is placed in the **QuoteWerks CustomText01** field. This destination field can by changed in the **ConnectIt-Sage Configuration** utility.

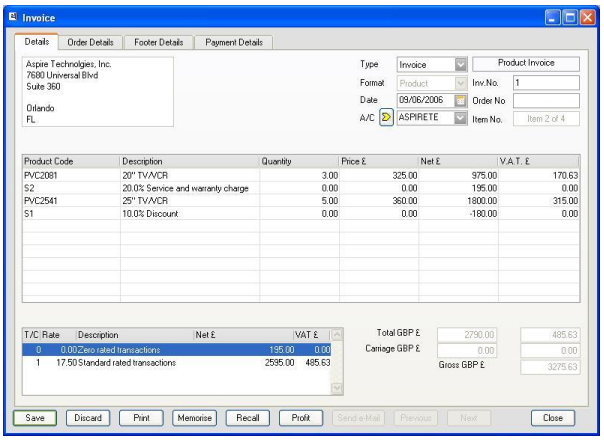
As part of your configuration of the **QuoteWerks** application, you can change the label to **Sage Invoice #** (or similar).



All products are created as line items on the **Sage** document.

Non-VAT **Charge** and **Discount** line types are created using the **Sage Non Stock Product Code 'S2'**.

Charge and **Discount** line types with VAT are created using the **Sage Non Stock Product Code 'S1'**.



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