

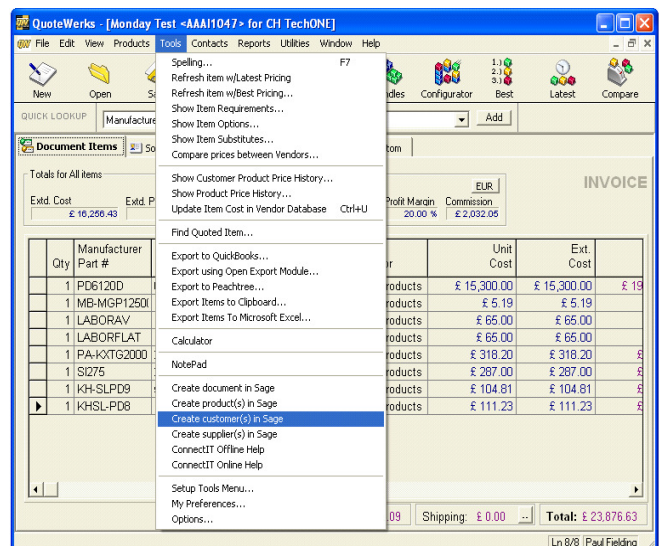
# Step-by-Step Guide to the ConnectIt Create Customer Wizard

The **ConnectIt Create Customer Wizard** utility provides a way to create customers in **Sage 50 Accounts**. To start the **ConnectIt Create Customer Wizard** application, you can use the **Create customer(s) in Sage** option from the **QuoteWerks | Tools** menu or browse to the **Start | All Programs | ConnectIt** menu and click the **ConnectIt Create Customer Wizard** option.

## 1. Starting...

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

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



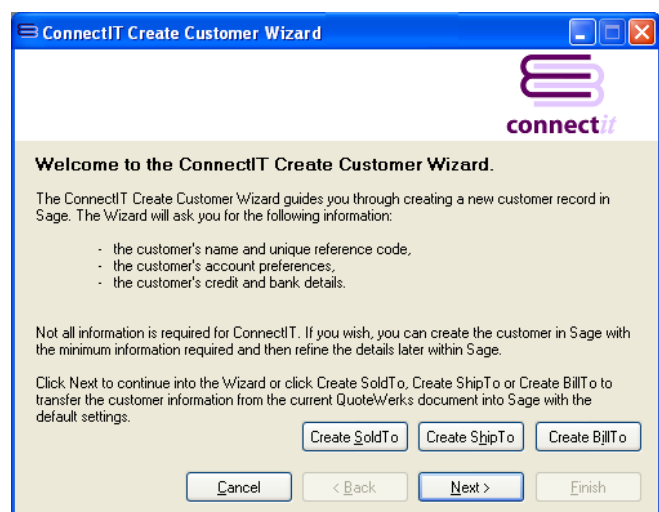
## 2. Welcome...

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

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

- the customer's name and unique reference code
- the customer's account preferences
- the customer's credit and bank details

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



Click **Next** to continue by manually creating a customer, or click **Create Sold To**, **Create Ship To** or **Create Bill To** to transfer the customer information from the selected **QuoteWerks** address details into **Sage**.

### 3. Mandatory Information...

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

- Name
- Account Reference

An alternative customer delivery address can be transferred to **Sage** by clicking the Create Alternate Customer Delivery Address option and then by selecting the required Address Field from the drop down list box.

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

Alternatively, you can click Back and then click **Create Sold To**, **Create Ship To** or **Create Bill To**. Or you can click **Finish** to create the customer in **Sage**.

The screenshot shows a software window titled "ConnectIT Create Customer Wizard". The main heading is "Enter the mandatory information to create the customer in Sage." Below this, there is explanatory text: "To create a new customer in Sage 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 at a later date or click 'Next' to complete all the details now." A note follows: "Note: If you wish to use the Create SoldTo, Create ShipTo or Create BillTo functionality then you do not need to enter a Name and Account Reference here - indicated by the highlighted label." The form contains four fields: "Name" (text input), "Account Reference" (text input), "Create Alternate Customer Delivery Address" (checkbox), and "Address Field" (dropdown menu). At the bottom, there are four buttons: "Cancel", "< Back", "Next >", and "Finish".

### 4. Customer Address Details...

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

- Address
- Postcode
- Country
- Telephone
- Fax

This information is not mandatory.

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

The screenshot shows a software window titled "ConnectIT Create Customer Wizard". The main heading is "Enter the customer address details." Below this, there is explanatory text: "Enter the customer's address, telephone and fax details." The form contains several fields: "Street 1", "Street 2", "Town", "County", "Postcode", "Country" (dropdown menu with "United Kingdom - GB" selected), "Telephone", and "Fax". At the bottom, there are four buttons: "Cancel", "< Back", "Next >", and "Finish".

## 5. Customer Contact Information...

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

- E-Mail
- Website
- Contact Name
- Trade Contact
- VAT Number
- Account Status

This information is not mandatory.

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

The screenshot shows a software window titled "ConnectIT Create Customer Wizard" with the "connectit" logo in the top right. The main heading is "Enter the customer contact information." Below it, a sub-heading reads "Enter the customer's contact information and account details." The form contains several input fields: "e-Mail", "Website", "Contact Name", "Trade Contact", and "VAT Number", each with a corresponding text box. The "Account Status" field is a dropdown menu currently showing "00 - Open". At the bottom of the window, there are four buttons: "Cancel", "< Back", "Next >", and "Finish".

## 6. Enter Additional Account Information...

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

- Credit Limit
- Discount %
- Additional Discount
- Department
- Currency
- Nominal Code
- Use Default Nominal Code for Sales
- Tax Code
- Use Default Tax Code for Sales

This information is not mandatory.

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

The screenshot shows a software window titled "ConnectIT Create Customer Wizard" with the "connectit" logo in the top right. The main heading is "Enter additional account information." Below it, a sub-heading reads "Enter the following information for the new customer's account (where applicable)." The form contains several input fields and checkboxes: "Credit Limit" (text box with "0.00"), "Discount %" (text box with "0.00"), "Additional Discount" (dropdown menu with "No Discount"), "Department" (dropdown menu with "000 - Default"), "Currency" (dropdown menu with "01 - GBP"), "Nominal Code" (dropdown menu with "4000"), "Tax Code" (dropdown menu with "T1 - Standard re"), "Use Default Nominal Code for Sales" (checkbox), and "Use Default Tax Code for Sales" (checkbox). At the bottom of the window, there are four buttons: "Cancel", "< Back", "Next >", and "Finish".

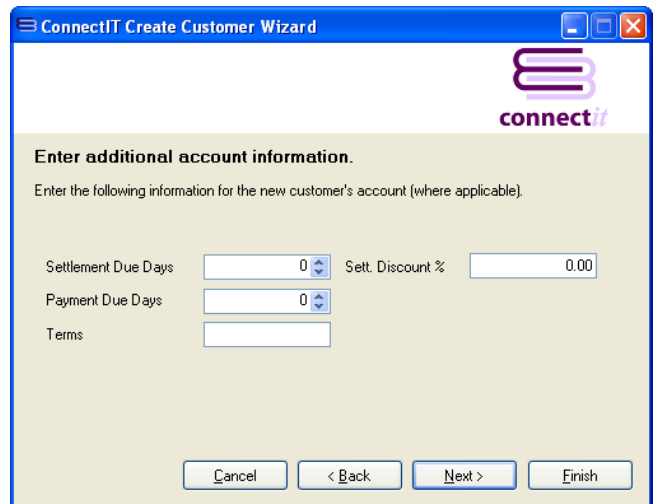
## 7. Enter Additional Account Information...

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

- Settlement Due Days
- Payment Due Days
- Terms
- Sett. Discount %

This information is not mandatory.

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



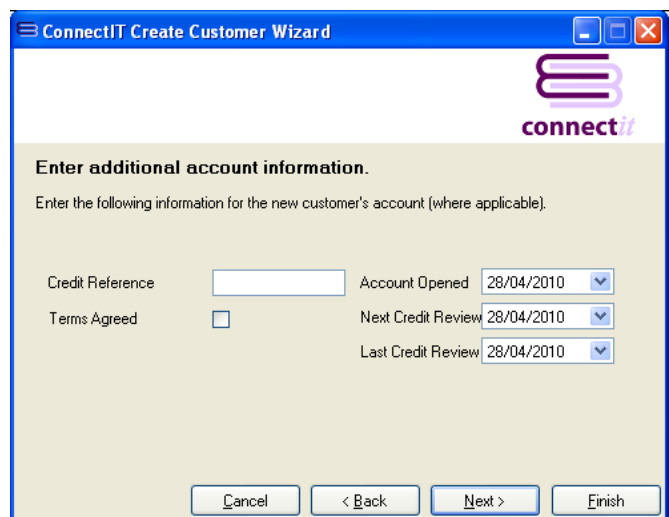
## 8. Enter Additional Account Information...

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

- Credit Reference
- Terms Agreed
- Account Opened
- Next Credit Review
- Last Credit Review

This information is not mandatory.

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



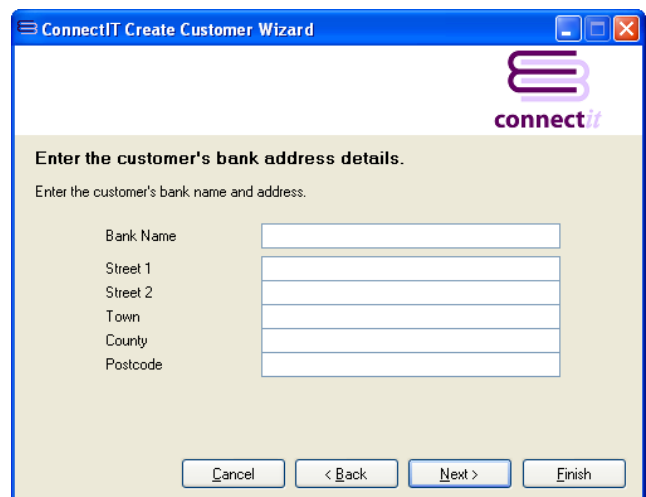
## 9. Enter Customer's Bank Address Details...

On the **customer's bank address details** screen, information can be entered for:

- Bank Name
- Street 1
- Street 2
- Town
- County
- Postcode

This information is not mandatory.

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



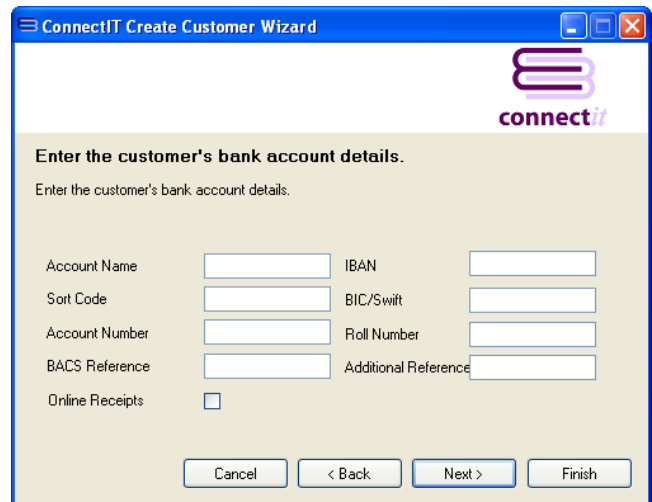
## 10. Enter Customer's Bank Account Details...

On the **customer's bank account details** screen, information can be entered for:

- Account Name
- Sort Code
- Account Number
- BACS Reference
- Online Receipts
- IBAN
- BIC/Swift
- Roll Number
- Additional Reference

This information is not mandatory.

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



The screenshot shows the 'ConnectIT Create Customer Wizard' window. The title bar reads 'ConnectIT Create Customer Wizard'. The window contains the 'connectit' logo and the heading 'Enter the customer's bank account details.' Below this, it says 'Enter the customer's bank account details.' There are several input fields: 'Account Name', 'Sort Code', 'Account Number', 'BACS Reference', 'Online Receipts' (with a checkbox), 'IBAN', 'BIC/Swift', 'Roll Number', and 'Additional Reference'. At the bottom, there are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'.

## 11. Complete!

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

Click **Finish** to close the **ConnectIt Create Customer Wizard** and create the customer in **Sage**.

**Note: If opening balances are applicable to the customer you have just created via the ConnectIt Create Customer Wizard, these will need to be entered in Sage.**



The screenshot shows the 'ConnectIT Create Customer Wizard v1.9.0' window. The title bar reads 'ConnectIT Create Customer Wizard v1.9.0'. The window contains the 'connectit' logo and the heading 'Complete!' Below this, it says 'You have successfully entered details for your new customer. Select 'Finish' and the new customer will be created in Sage.' There is a note: 'NB: if opening balances are applicable to this customer then please enter them in Sage.' Below the note, it says 'Click Finish to create the customer entered in Step 2 of the Wizard or click Create SoldTo, Create ShipTo or Create BillTo to transfer the customer information on the current QuoteWerks document into Sage with the entered settings.' At the bottom, there are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'. Above the 'Finish' button, there are three buttons: 'Create SoldTo', 'Create ShipTo', and 'Create BillTo'.

## 12. Additional Customers

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

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



The screenshot shows the 'ConnectIT Create Customer Wizard' window. The title bar reads 'ConnectIT Create Customer Wizard'. The window contains a question mark icon and the text 'The new Customer was successfully created in Sage. Would you like to use these details and create another Customer in Sage?' At the bottom, there are two buttons: 'Yes' and 'No'.