

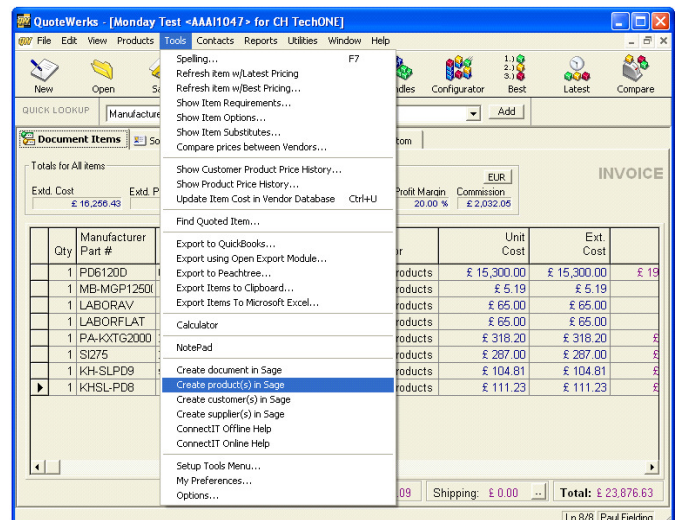
Step-by-Step Guide to the ConnectIt Create Product Wizard

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

1. Starting...

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

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



2. Welcome...

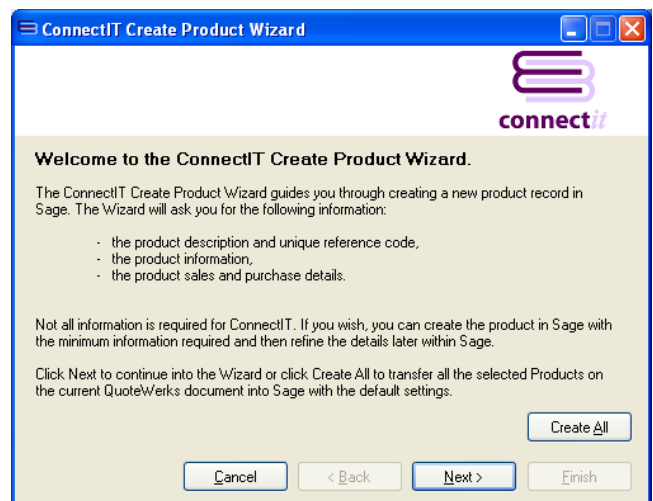
The **ConnectIt Create Product Wizard** guides you through creating a new product(s) in **Sage**.

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

- product description and unique reference code
- product information
- sales and purchase details

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

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



3. Mandatory Information...

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

- Description
- Code

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

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

The screenshot shows the 'ConnectIT Create Product Wizard' window. The title bar reads 'ConnectIT Create Product Wizard'. The Sage logo is in the top right. The main heading is 'Enter the for mandatory information to create the product in Sage.' Below this, a note states: 'To create a new product 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 sub-note says: 'Note: If you wish to use the Create All functionality then you do not need to enter a Description and Code here.' There are two input fields: 'Description' and 'Code'. At the bottom, there are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'.

4. Product Details...

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

- Location
- Category
- Commodity code
- Weight

This information is not mandatory.

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

The screenshot shows the 'ConnectIT Create Product Wizard' window. The title bar reads 'ConnectIT Create Product Wizard'. The Sage logo is in the top right. The main heading is 'Enter the product details.' Below this, a note states: 'Enter details about the product's category, location, commodity code and unit weight (where applicable).' There are four input fields: 'Location' (text box), 'Category' (dropdown menu with '1' selected), 'Commodity Code' (text box), and 'Weight' (text box with '0.00' entered). At the bottom, there are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'.

5. Product Sales Details...

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

- Sales price
- Sales Nominal Code
- Unit of Sale
- Tax Code
- Department
- Item Type

This information is not mandatory.

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

The screenshot shows the 'ConnectIT Create Product Wizard' window. The title bar reads 'ConnectIT Create Product Wizard'. The Sage logo is in the top right. The main heading is 'Enter the product sales details.' Below this, a note states: 'Enter sales details about the product's sale price, unit of sale, tax code and department (where applicable).' There are six input fields: 'Sale Price' (text box with '0.00' entered), 'Sales Nominal Code' (dropdown menu with '4000' selected), 'Unit of Sale' (text box), 'Tax Code' (dropdown menu with 'T1 - Standard re' selected), 'Department' (dropdown menu with '000 - Default' selected), and 'Item Type' (dropdown menu with 'Stock Item' selected). At the bottom, there are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'.

6. Product Purchase Details...

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

- Supplier account
- Part number
- Purchase nominal code
- Re-Order level
- Re-Order Quantity
- Cost Price

This information is not mandatory.

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

The screenshot shows the 'ConnectIT Create Product Wizard' window. The title bar reads 'ConnectIT Create Product Wizard'. The window contains the 'connectit' logo and the heading 'Enter the product purchase details.' Below this, a sub-heading reads: 'Enter purchase details about the product's supplier account, part number, re-order level, re-order quantity and cost price (where applicable).' There are six input fields: 'Supplier Account' (dropdown), 'Part Number' (text), 'Purchase Nominal Code' (dropdown with '5000' selected), 'Re-Order Level' (text with '0.00'), 'Re-Order Quantity' (text with '0.00'), and 'Cost Price' (text with '0.00'). At the bottom, there are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'.

7. Complete!

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

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

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

The screenshot shows the 'ConnectIT Create Product Wizard' window. The title bar reads 'ConnectIT Create Product Wizard'. The window contains the 'connectit' logo and the heading 'Complete!'. Below this, the text reads: 'You have successfully entered details for your new product. Select 'Finish' and the new product will be created in Sage.' A note follows: 'NB: if opening balances are applicable to this product then please enter them in Sage.' Another note reads: 'Click Finish to create the product entered in Step 2 of the Wizard or click Create All to transfer all the selected Products on the current QuoteWorks document into Sage with the entered settings.' At the bottom, there are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'. A 'Create All' button is also visible on the right side.

8. Additional Products

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

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

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