

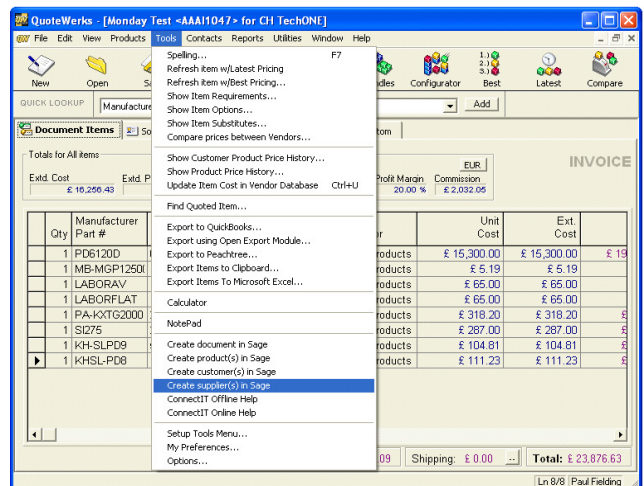
# Step-by-Step Guide to the ConnectIt Create Supplier Wizard

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

## 1. Starting...

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

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



## 2. Welcome...

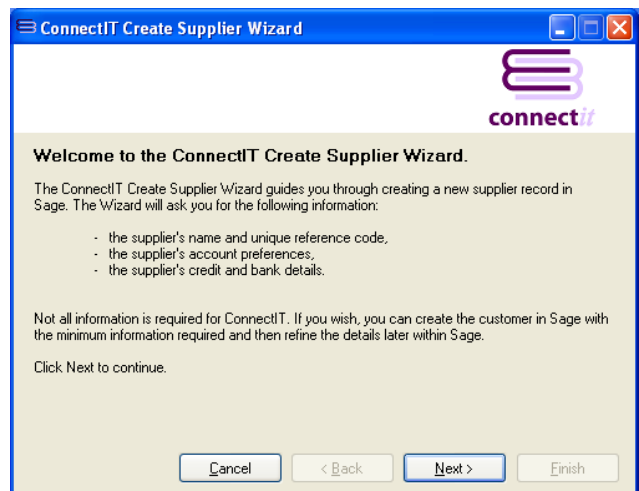
The **ConnectIt Create Supplier Wizard** guides you through creating a new supplier(s) in **Sage**.

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

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

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

Click **Next** to continue.



### 3. Mandatory Information...

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

- Name
- Account Reference

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

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

The screenshot shows the 'ConnectIT Create Supplier Wizard' window. The title bar reads 'ConnectIT Create Supplier Wizard'. The Sage logo is in the top right. The main heading is 'Enter the for mandatory information to create the supplier in Sage.' Below this is a sub-heading: 'To create a new supplier 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.' There are two input fields: 'Name' and 'Account Reference'. At the bottom are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'.

### 4. Supplier Address Details...

On the **supplier 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 supplier or click **Finish** to create the supplier in **Sage**.

The screenshot shows the 'ConnectIT Create Supplier Wizard' window. The title bar reads 'ConnectIT Create Supplier Wizard'. The Sage logo is in the top right. The main heading is 'Enter the supplier address details.' Below this is a sub-heading: 'Enter the supplier's address, telephone and fax details.' There are several input fields: 'Street 1', 'Street 2', 'Town', 'County', 'Postcode', 'Country' (a dropdown menu showing 'United Kingdom - GB'), 'Telephone', and 'Fax'. At the bottom are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'.

### 5. Supplier Contact Information...

On the **supplier 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 supplier or click **Finish** to create the supplier in **Sage**.

The screenshot shows the 'ConnectIT Create Supplier Wizard' window. The title bar reads 'ConnectIT Create Supplier Wizard'. The Sage logo is in the top right. The main heading is 'Enter the supplier contact information.' Below this is a sub-heading: 'Enter the supplier's contact information and account details.' There are several input fields: 'e-Mail', 'Website', 'Contact Name', 'Trade Contact', 'VAT Number', and 'Account Status' (a dropdown menu showing '00 - Open'). At the bottom 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
- Nominal Code
- Use Default Nominal Code for Sales
- Tax Code
- Use Default Tax Code for Sales
- DUNS Number

This information is not mandatory.

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

The screenshot shows the 'ConnectIT Create Supplier Wizard' window. The title bar reads 'ConnectIT Create Supplier Wizard'. The Sage logo is in the top right corner. The main heading is 'Enter additional account information.' Below it, a sub-heading says 'Enter the following information for the new supplier's account (where applicable).' The form contains the following fields: 'Credit Limit' (text box with '0.00'), 'Nominal Code' (dropdown menu with '4000'), 'Discount %' (text box with '0.00'), 'Use Default Nominal Code for Sales' (checkbox), 'Additional Discount' (dropdown menu with 'No Discount'), 'Tax Code' (dropdown menu with 'T1 - Standard re'), 'Department' (dropdown menu with '000 - Default'), 'Use Default Tax Code for Sales' (checkbox), and 'DUNS Number' (text box). At the bottom, 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
- Settlement Discount %

This information is not mandatory.

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

The screenshot shows the 'ConnectIT Create Supplier Wizard' window. The title bar reads 'ConnectIT Create Supplier Wizard'. The Sage logo is in the top right corner. The main heading is 'Enter additional account information.' Below it, a sub-heading says 'Enter the following information for the new supplier's account (where applicable).' The form contains the following fields: 'Settlement Due Days' (spin box with '0'), 'Sett. Discount %' (text box with '0.00'), 'Payment Due Days' (spin box with '0'), and 'Terms' (text box). At the bottom, there are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'.

## 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 supplier or click **Finish** to create the supplier in Sage.

The screenshot shows the 'ConnectIT Create Supplier Wizard' window. The title bar reads 'ConnectIT Create Supplier Wizard'. The Sage logo is in the top right corner. The main heading is 'Enter additional account information.' Below it, a sub-heading says 'Enter the following information for the new supplier's account (where applicable).' The form contains the following fields: 'Credit Reference' (text box), 'Account Opened' (dropdown menu with '28/04/2010'), 'Terms Agreed' (checkbox), 'Next Credit Review' (dropdown menu with '28/04/2010'), and 'Last Credit Review' (dropdown menu with '28/04/2010'). At the bottom, there are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'.

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

On the **supplier'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 supplier or click **Finish** to create the supplier in **Sage**.

The screenshot shows a window titled "ConnectIT Create Supplier Wizard" with the ConnectIT logo in the top right. The main heading is "Enter the supplier's bank address details." Below this, it says "Enter the supplier's bank name and address." The form contains the following fields: "Bank Name" (one text box), "Street 1" (one text box), "Street 2" (one text box), "Town" (one text box), "County" (one text box), and "Postcode" (one text box). At the bottom, there are four buttons: "Cancel", "< Back", "Next >", and "Finish".

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

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

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

This information is not mandatory.

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

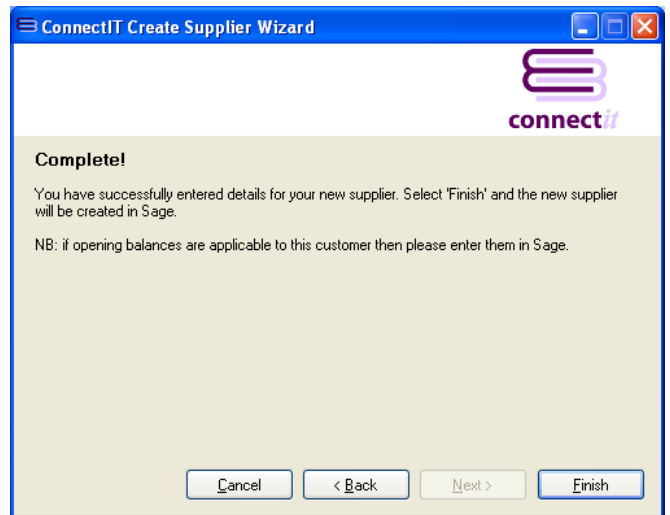
The screenshot shows a window titled "ConnectIT Create Supplier Wizard" with the ConnectIT logo in the top right. The main heading is "Enter the supplier's bank account details." Below this, it says "Enter the supplier's bank account details." The form contains the following fields: "Account Name" (one text box), "IBAN" (one text box), "Sort Code" (one text box), "BIC/Swift" (one text box), "Account Number" (one text box), "Roll Number" (one text box), "BACS Reference" (one text box), "Additional Reference" (one text box), and "Online Payments" (a checkbox). At the bottom, there are four buttons: "Cancel", "< Back", "Next >", and "Finish".

## 11. Complete!

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

Click **Finish** to close the **ConnectIt Create Supplier Wizard** and create the supplier in **Sage**.

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



## 12. Additional Suppliers

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

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

