

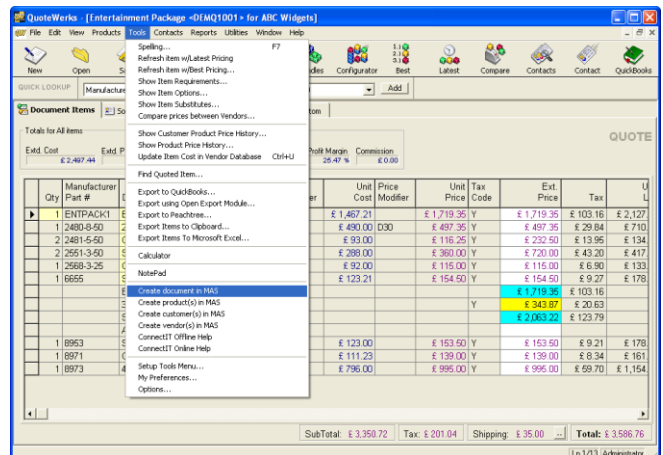
Step-by-Step Guide to Document Creation

The **ConnectIt-MAS90** utility provides a way to create documents in **Sage MAS**. To start the **ConnectIt-MAS90** application, click the **Create document in MAS** option from the **QuoteWerks | Tools** menu.

Much of the default behaviour described here can be modified by using the **ConnectIt-MAS90 Configuration** utility; please cross-reference this with the **ConnectIt-MAS90 Step-by-Step Guide to Configuration** to review setup options.

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

This starts the **ConnectIt-MAS90/200** application.

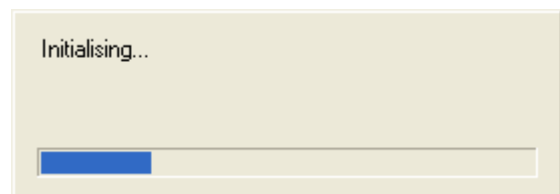


2. Initialising...

ConnectIt-MAS90/200 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-MAS90/200 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 MAS**.

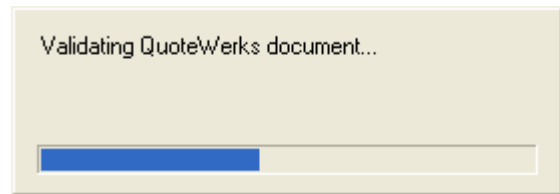
3. Validating QuoteWerks document...

ConnectIt-MAS90/200 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 MAS**.

Then **ConnectIt-MAS90/200** checks that the **QuoteWerks** active document **Type** and **Status** are valid, as follows.

By default in **ConnectIt-MAS90/200** this means that the document must be Type **QUOTE** and have a status of **Quote Ready for Sage**. This default may be modified or additional document type and status combinations added. Please refer to the **ConnectIt-MAS90 Configuration** utility and documentation for further details.

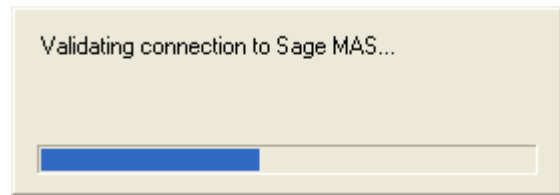
If the document has a **Type** or **Status** which is not recognised by **ConnectIt-MAS90/200**, then you will be prompted and the document is not created in **Sage MAS**.



4. Validating connection to Sage MAS...

ConnectIt-MAS90/200 checks to make sure that it can connect to the **Sage MAS** accounts.

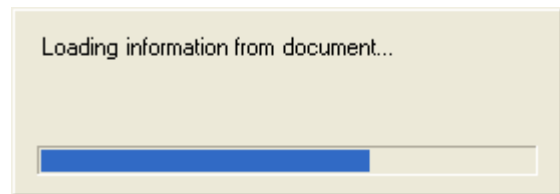
If **ConnectIt-MAS90/200** cannot logon to the **Sage MAS** accounts, then you will be prompted and the document is not created in **Sage MAS**.



5. Loading information from document...

ConnectIt-MAS90/200 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, Running Sub Totals** or **Group Headers**. These line types are not added to the **Sage MAS** document. Secondly, because **Don't Print** lines appear on the QuoteWerks document. These line types are added to the **Sage MAS** document because a value may be associated with them which effects the total amount of the document.



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6. Collating information from Sage MAS...

ConnectIt-MAS90/200 gets the required additional customer, vendor and product information from **Sage MAS**.

ConnectIt-MAS90/200 attempts to match the **Company** name specified in the **QuoteWerks** document **Bill To** fields to an **A/R Customer** name in **Sage MAS**. If a match is found, then that **Customer Number** is used from **Sage MAS**. If no match is found, then you will be prompted and the document is not created in **Sage MAS**.

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

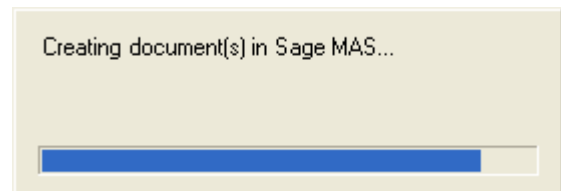
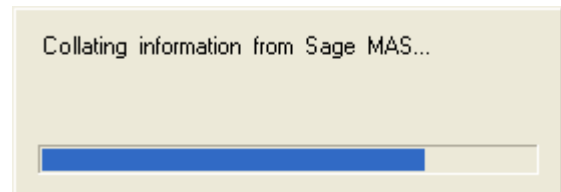
Lastly, **ConnectIt-MAS90/200** attempts to exactly match the **QuoteWerks** document line item **Manufacturer Part Number** to a **Product Code** in **Sage MAS**. If a match is found, then that product's additional details are used. If no match is found, then you will be prompted and the document is not created in **Sage MAS**.

Note: only the details that are not in QuoteWerks are used from Sage MAS when creating the Sage MAS document. All other details for the Sage MAS 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-MAS90/200 Configuration** utility and documentation for further information.

7. Creating document in Sage MAS...

ConnectIt-MAS90/200 creates the document in **Sage MAS!**



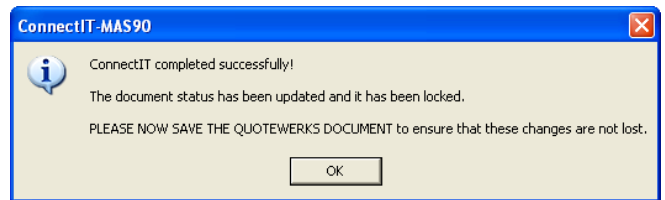
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8. Click OK to complete the ConnectIt-MAS90 program...

ConnectIt-MAS90/200 tells you that the document was successfully created in **Sage MAS**, that fields on the **QuoteWerks** document have been updated and requests that you now save the **QuoteWerks** document.

Details of the fields that **ConnectIt-MAS90/200** has updated in **QuoteWerks** are covered in the **Notes** section below.



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

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



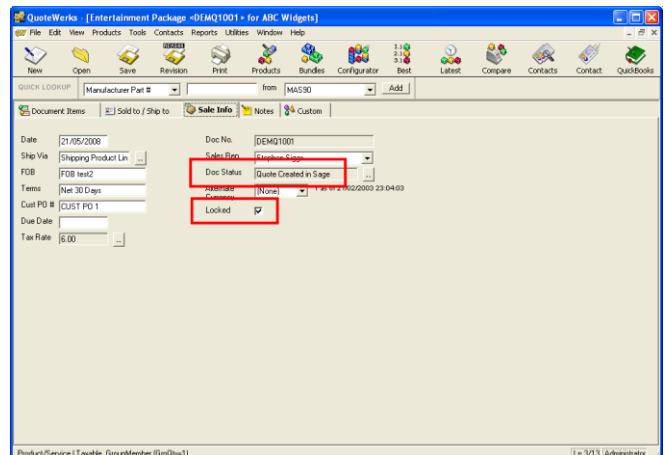
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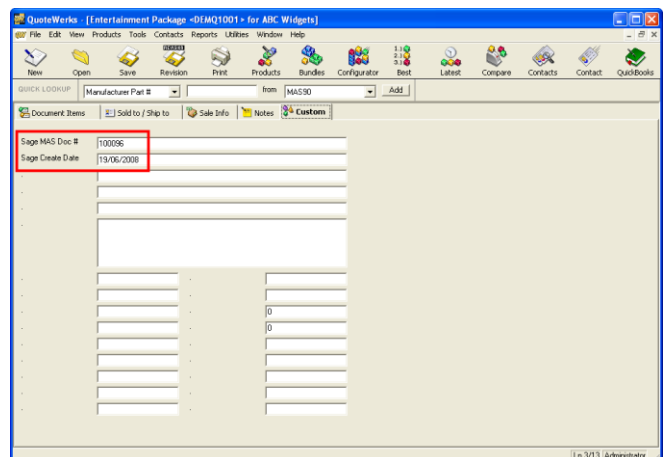
The **QuoteWerks Doc Status** on the **Sale Info** tab field is set to the End Status (as set up in the **ConnectIt-MAS90/200 Configuration** utility) and the document is **Locked**.

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 MAS Document Number** is placed in the **QuoteWerks CustomText01** field and the **Sage MAS Create Date** in **CustomText02**. This destination field can be changed in the **ConnectIt-MAS90 Configuration** utility.

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



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

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

Taxable **Percent Discount** and **Percent Charge Line Types** are summed and their value entered into the **Sage MAS** document **Discount Amount** field.

Non-Taxable **Percent Discount** and **Percent Charge Line Types** are created using the **C/I** module "M" **Miscellaneous Item Code**.

