

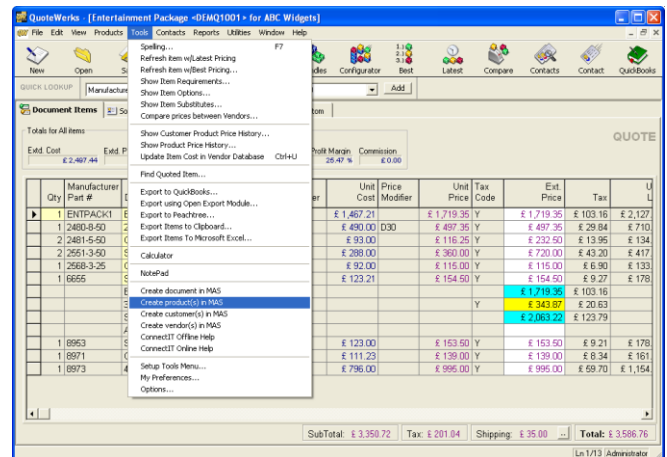
Step-by-Step Guide to the ConnectIt Create Product Wizard

The **ConnectIt Create Product Wizard** utility provides a way to create products in **Sage MAS**. To start the **ConnectIt Create Product Wizard** application, you can use the **Create product(s) in MAS** 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 MAS** option from the **QuoteWerks | Tools** menu.

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



2. Welcome...

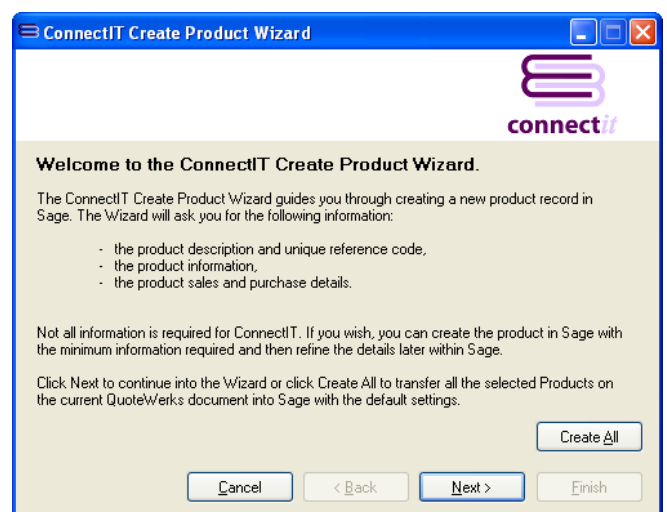
The **ConnectIt Create Product Wizard** guides you through creating a new product(s) in **Sage MAS**.

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 MAS**.

Click **Next** to continue by manually creating a



single product, or click **Create All** to create all the products in **Sage MAS** 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 MAS**.

- 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 MAS**.

4. Product Details...

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

- Product Line & Type
- Valuation
- Procurement
- Unit of Measure
- Weight & Volume
- Inventory Cycle

This information is not mandatory.

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

5. More Product Details...

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

- Pricing
- Warehouse
- Warranty Code
- Stocking
- Tax Classes

This information is not mandatory.

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

Note: Price Code and Primary Vendor selection is not available at this time.

The screenshot shows the 'ConnectIT Create Product Wizard' window. The title bar reads 'ConnectIT Create Product Wizard'. The main content area is titled 'Enter the product details.' and includes the instruction: 'Enter details about the product's Price, Procurement, Unit of Measure, Weight and Volume (where applicable)'. The form contains several fields: 'Price Code' (dropdown menu showing 'LMP - LAMP QL'), 'Retail Price' (text box with '0'), 'Default Warehouse' (dropdown menu showing '001 - EAST WA'), 'Standard Price' (text box with '0'), 'Primary Vendor' (dropdown menu), 'Standard Cost' (text box with '0'), 'Warranty Code' (dropdown menu showing '30 DAY - 30 day'), 'Sales Tax Class' (dropdown menu), and 'Restock Method' (dropdown menu showing 'Fixed'). 'Purchase Tax Class' is also a dropdown menu. At the bottom, there are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'.

6. Product Options...

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

- Returns
- Back Orders
- Trade Discount
- Allocate Landed Costs

This information is not mandatory.

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

The screenshot shows the 'ConnectIT Create Product Wizard' window. The title bar reads 'ConnectIT Create Product Wizard'. The main content area is titled 'Select the required product options.' and includes the instruction: 'Select the appropriate options (where applicable)'. There are four checkboxes: 'Allow Returns', 'Allow Back Orders', 'Allow Trade Discount', and 'Allocate Landed Cost'. 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 MAS**, or click **Create All** to create all the products in **Sage MAS** that are highlighted in the **QuoteWerks** document.

The screenshot shows the 'ConnectIT Create Product Wizard' window. The title bar reads 'ConnectIT Create Product Wizard'. The main content area is titled 'Complete!' and includes the instruction: 'You have successfully entered details for your new product. Select 'Finish' and the new product will be created in Sage MAS.' Below this, it says: '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 QuoteWerks document into Sage MAS with the entered settings.' At the bottom, there are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'. A 'Create All' button is also visible in the bottom right corner.



Development Partner

SILVER

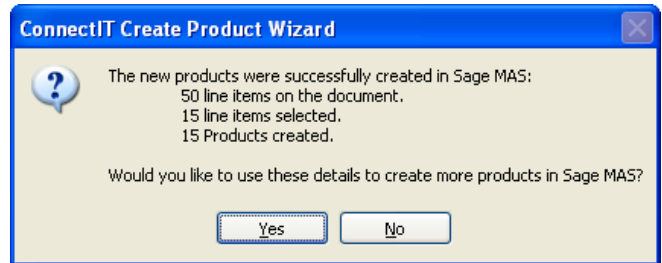
8. Additional Products

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 MAS**.

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



Or



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