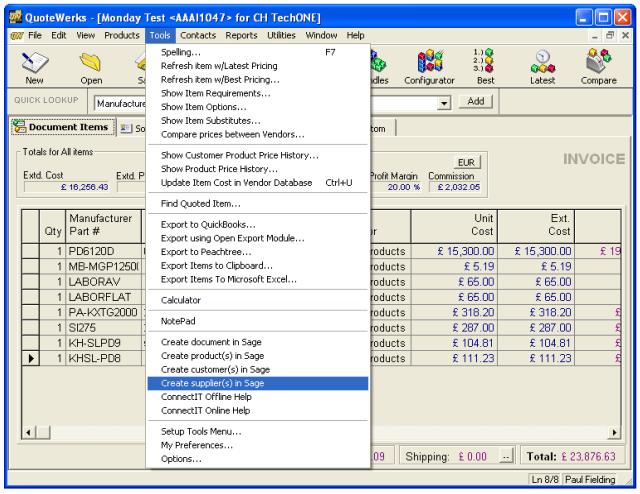
Step-by-Step Guide to the ConnectIt Create Supplier Wizard

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.

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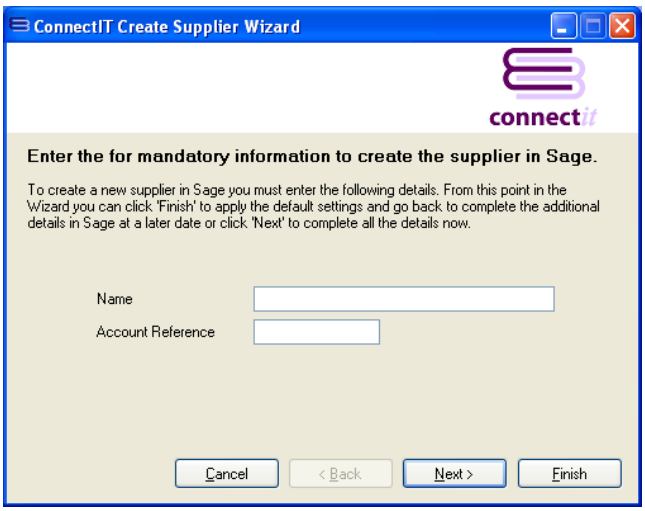
3. Mandatory Information…

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**.



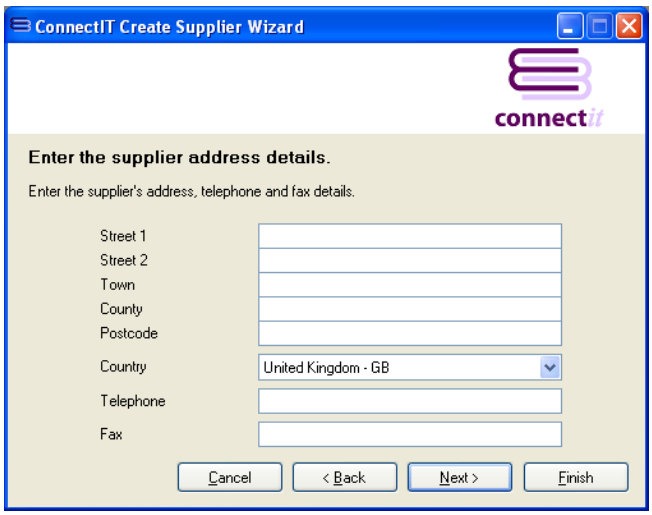
4. Supplier Address Details…

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**.



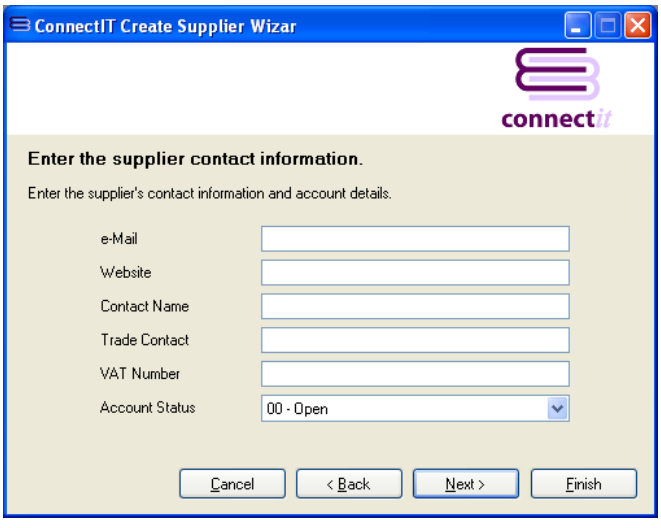
5. Supplier Contact Information…

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**.



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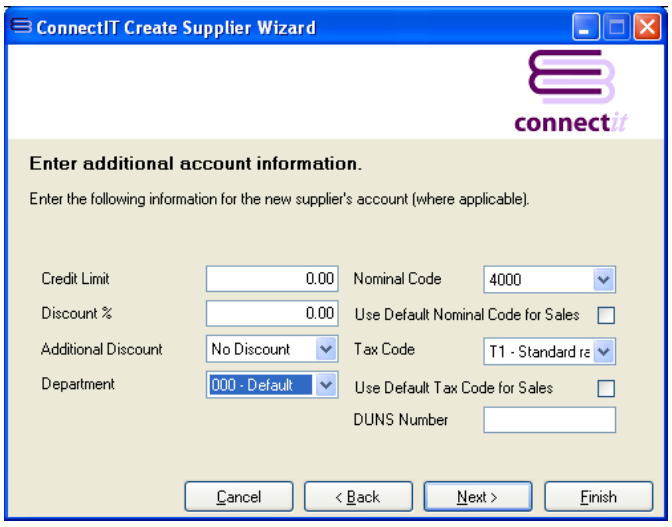
6. Enter Additional Account Information...



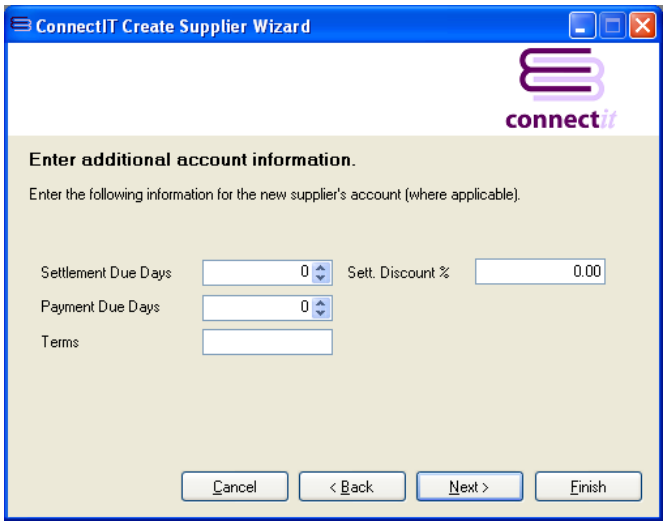
On the first **additional account information** screen, information can either be entered or selected for:

- 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**.

7. Enter Additional Account Information...



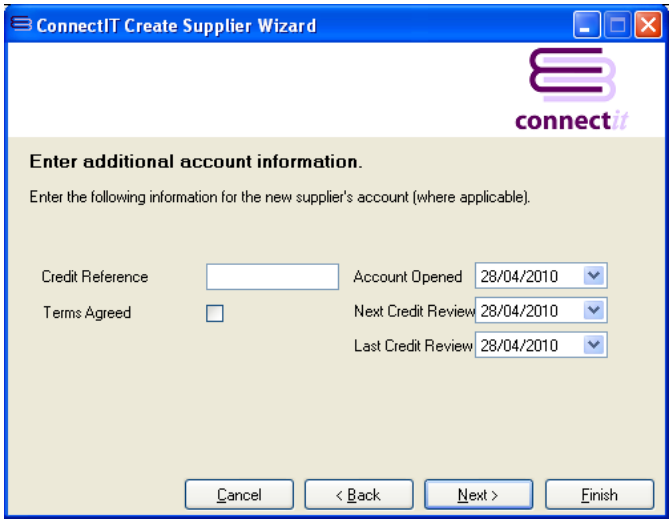
On the second **additional account information** screen, information can either be entered or selected for:

- 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**.

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**.

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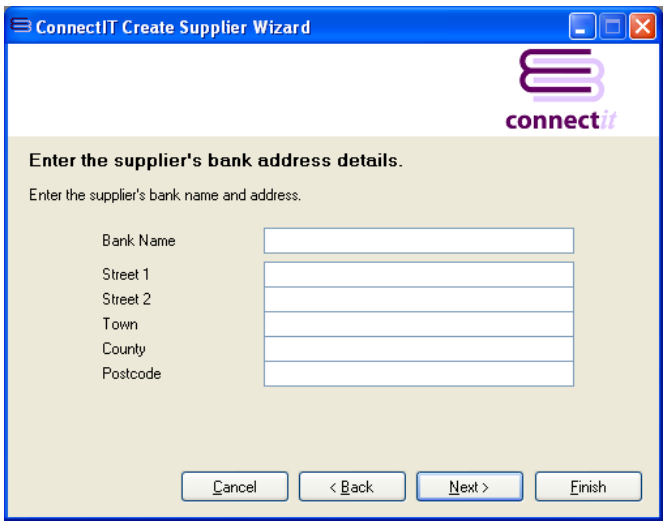
9. Enter Supplier's Bank Address Details...



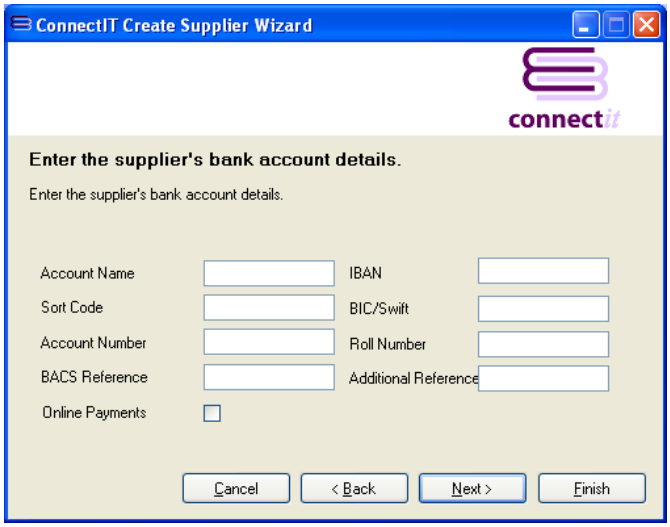
On the **supplier's bank address details** screen, information can be entered for:

- 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**.

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**.

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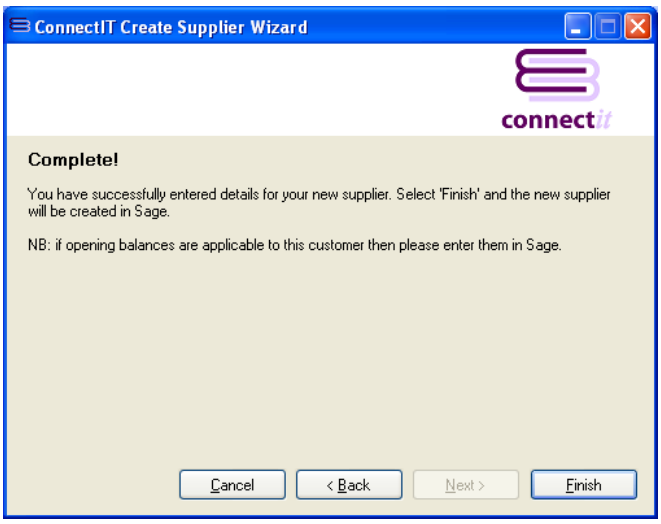
11. Complete!

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.**

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