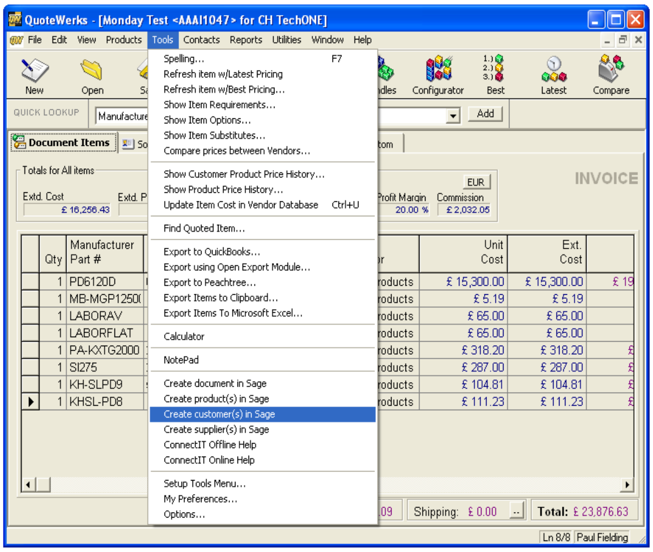
Step-by-Step Guide to the ConnectIt Create Customer Wizard

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

1. Starting…

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

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



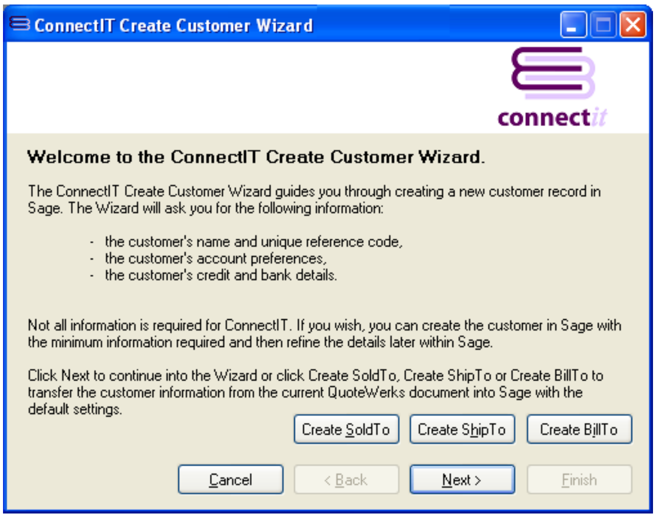
2. Welcome…

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

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

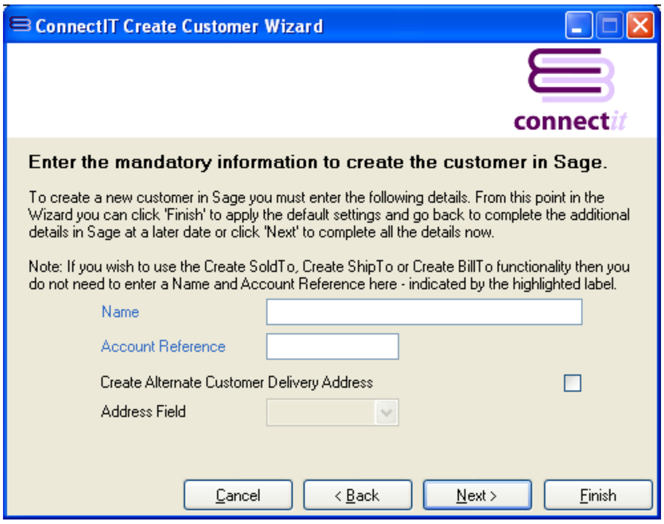
- the customer's name and unique reference code
- the customer's account preferences
- the customer's credit and bank details

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



Click **Next** to continue by manually creating a customer, or click **Create Sold To, Create Ship To** or **Create Bill To** to transfer the customer information from the selected **QuoteWerks** address details into **Sage.**

3. Mandatory Information…



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

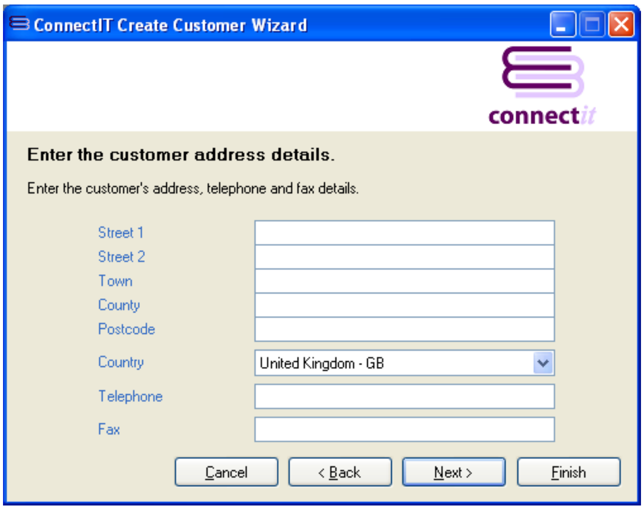
- Name
- Account Reference

An alternative customer delivery address can be transferred to **Sage** by clicking the Create Alternate Customer Delivery Address option and then by selecting the required Address Field from the drop down list box.

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

Alternatively, you can click Back and then click **Create Sold To**, **Create Ship To** or **Create Bill To**. Or you can click **Finish** to create the customer in **Sage**.

4. Customer Address Details…



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

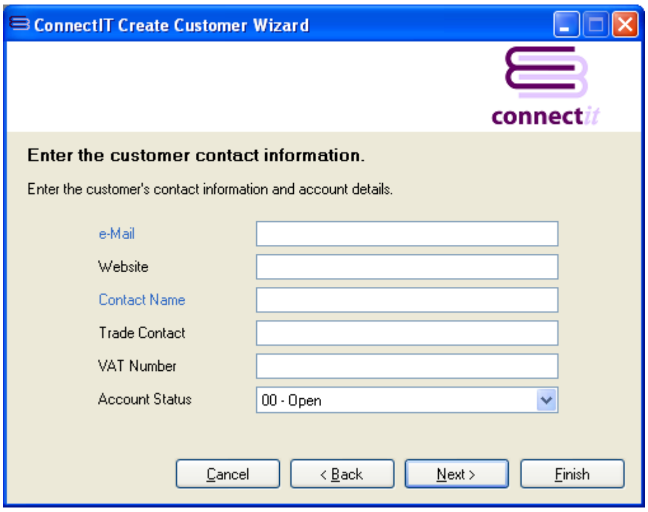
5. Customer Contact Information…

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



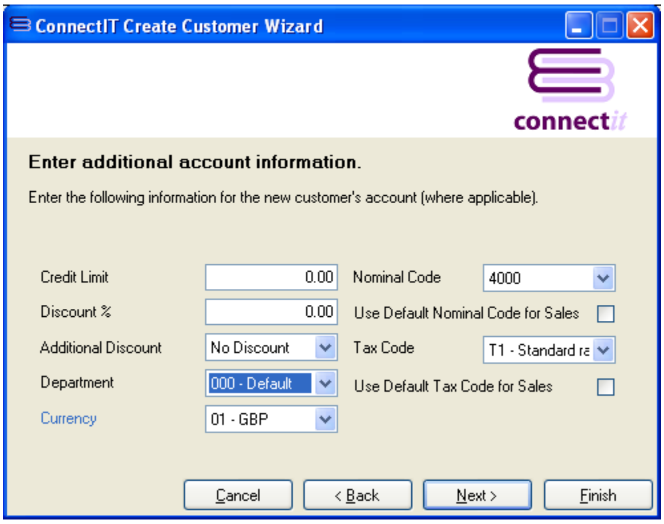
6. Enter Additional Account Information...

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

- Credit Limit
- Discount %
- Additional Discount
- Department
- Currency
- Nominal Code
- Use Default Nominal Code for Sales
- Tax Code
- Use Default Tax Code for Sales

This information is not mandatory.

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



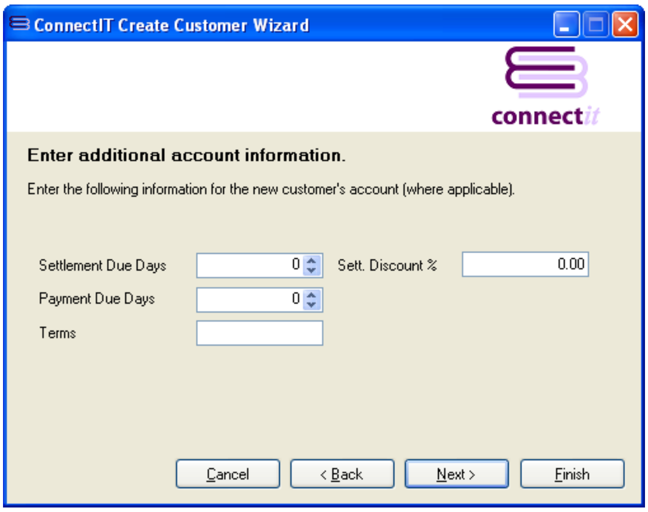
7. Enter Additional Account Information...

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

- Settlement Due Days
- Payment Due Days
- Terms
- Sett. Discount %

This information is not mandatory.

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



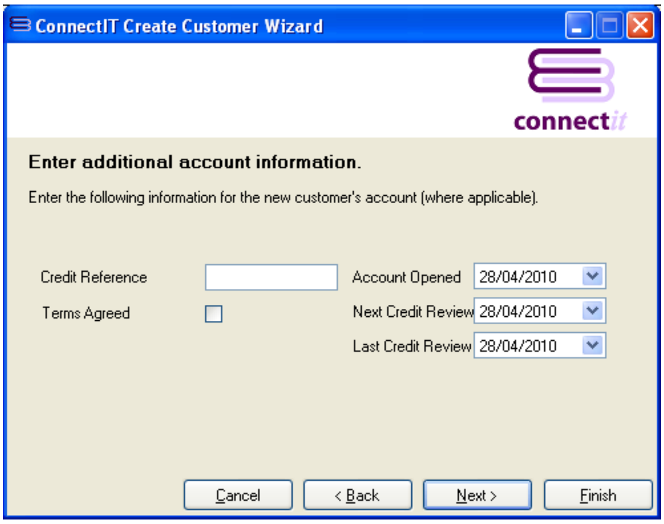
8. Enter Additional Account Information...

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 customer or click **Finish** to create the customer in **Sage**.



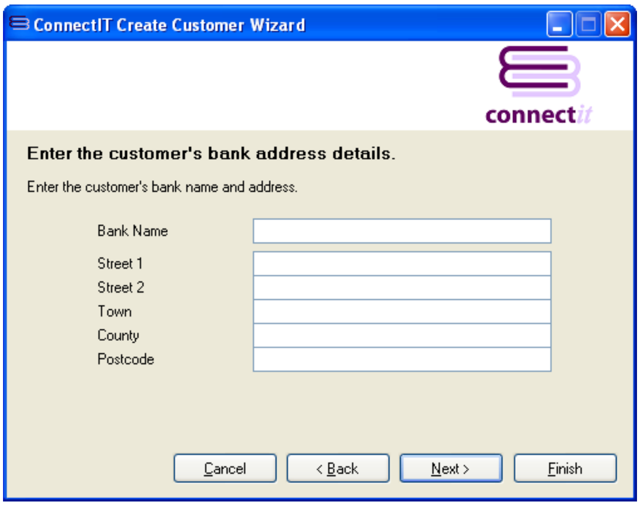
9. Enter Customer's Bank Address Details...

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



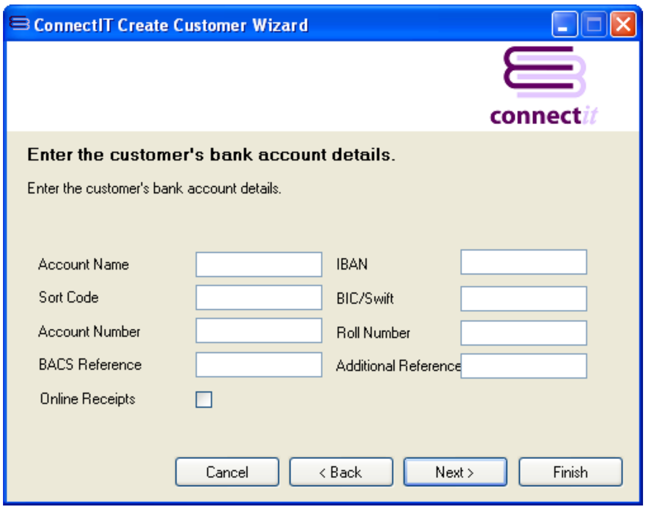
10. Enter Customer's Bank Account Details...

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

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

This information is not mandatory.

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

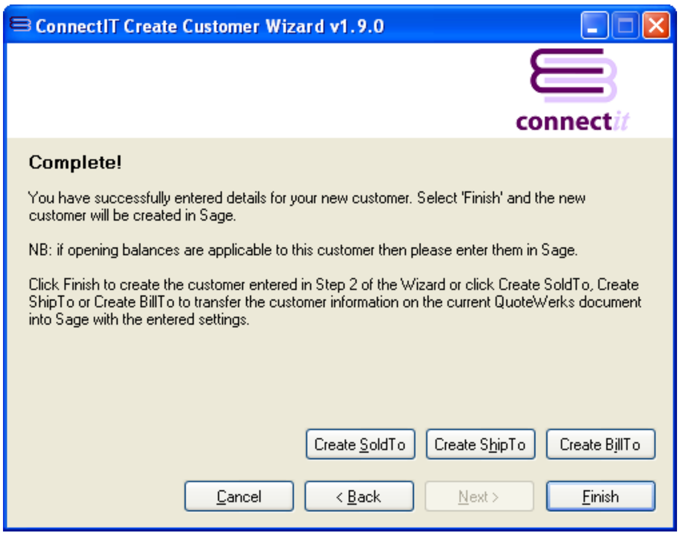


11. Complete!

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

Click **Finish** to close the **ConnectIt Create Customer Wizard** and create the customer in **Sage**.

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



12. Additional Customers

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

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