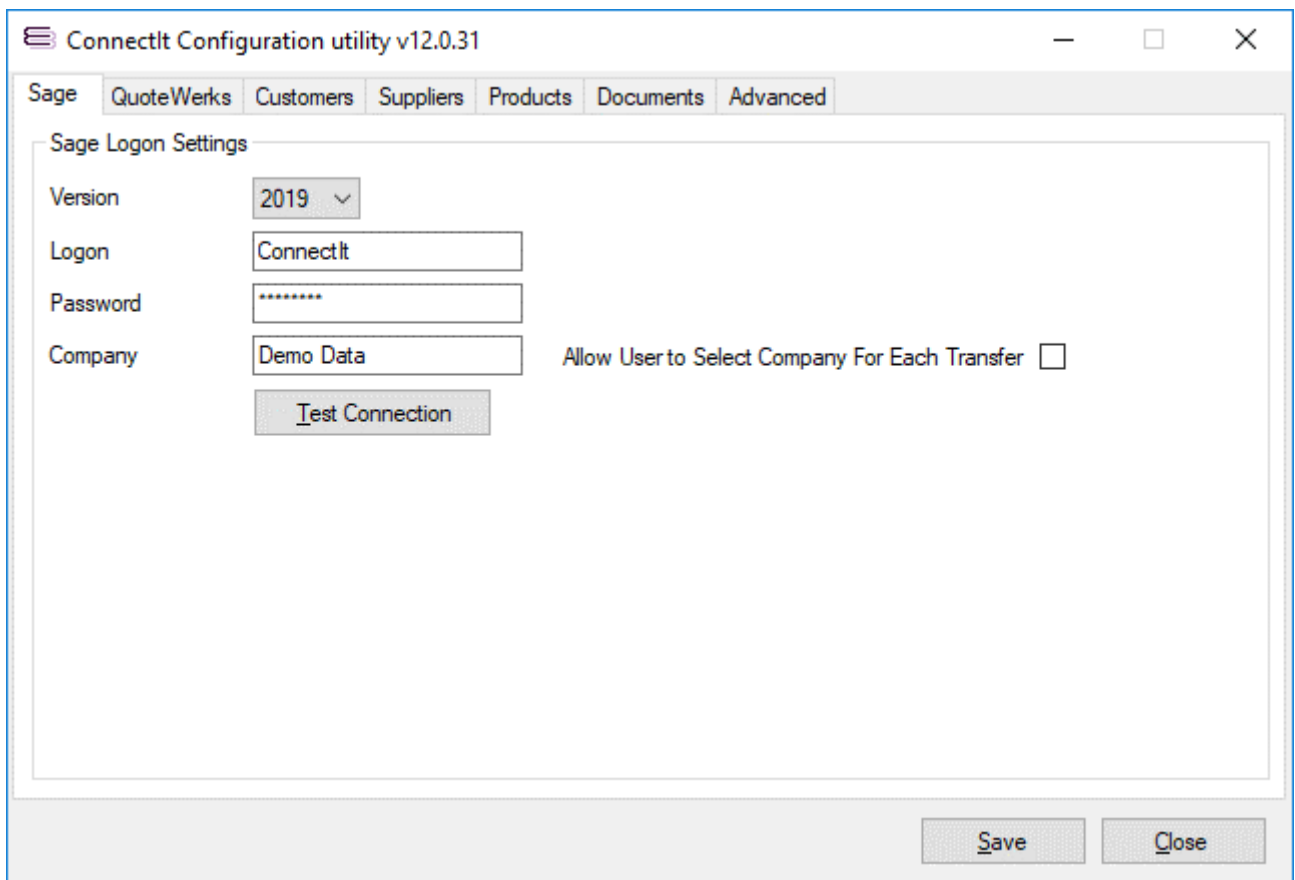# Step-by-Step Guide to Configuration

The **ConnectIt Configuration** utility provides a way to check or change the various settings the **ConnectIt** software uses when creating documents, customers, products and suppliers in **Sage 200**.

To open the **ConnectIt Configuration** application, browse to the **Start | All Programs | ConnectIt-Sage200** menu and click the **ConnectIt Configuration** option.

General Note: The field names in the drop down lists in the ConnectIt Configuration utility are the original QuoteWerks field names and not the customised field names. To find the original QuoteWerks field name label, (the Default Label Name), **go into QuoteWerks and double left click on the field name in question whilst holding down the Ctrl key.**

Sage Logon Settings

The **Sage** tab enables the connection to **Sage** to be set up and tested.

1. On the **Sage** tab, select the **Version** of **Sage** that you are running and then enter your **Logon**, and **Password**, as appropriate for your **Sage** installation.

2. Type the name of the **Company** that you would like documents, customers, products and suppliers to be created in.

3. If you run multiple sets of **Sage** accounts, then tick the **Allow User to Select Company For Each Transfer** option. **ConnectIt** will automatically read the list of accounts from the **Sage** installation – if just one set of accounts is set up, then **ConnectIt** will link to this set of accounts, but if more than one set of accounts are available, then **ConnectIt** will prompt the user to select which set of accounts to send the **QuoteWerks** document information to each time a transfer is made.

4. Click the **Test Connection** button to check that the settings are correct.

Note: On successful configuration, you will receive the message "Logon Information Tested OK!" If you do not receive this message, please check the details and try again.

5. Click the **Save** button to retain the settings on the **Sage** tab.

QuoteWerks Settings

The **QuoteWerks** tab enables the connection to **QuoteWerks** to be set up and tested.

1. On the **QuoteWerks** tab, select the **Edition** of **QuoteWerks** that you are running.

2. If running the **QuoteWerks Corporate** edition, the **Is Re-hosted to SQL Server (or MSDE or other variant)** option box becomes enabled. If you are running the **QuoteWerks Corporate** edition which has been re-hosted, tick this option to allow the rest of the information to be populated.

3. If running **QuoteWerks** which has been re-hosted, enter the **Server Name**, **Logon**, **Password**, **Database Name** and **Database Owner** information. This can be found by looking in the **backend.ini** file in the **QuoteWerks** installation directory.

Note: The password value is encrypted in the backend.ini file. You may need to ask your IT systems administrator or the person who originally re-hosted QuoteWerks for this information.
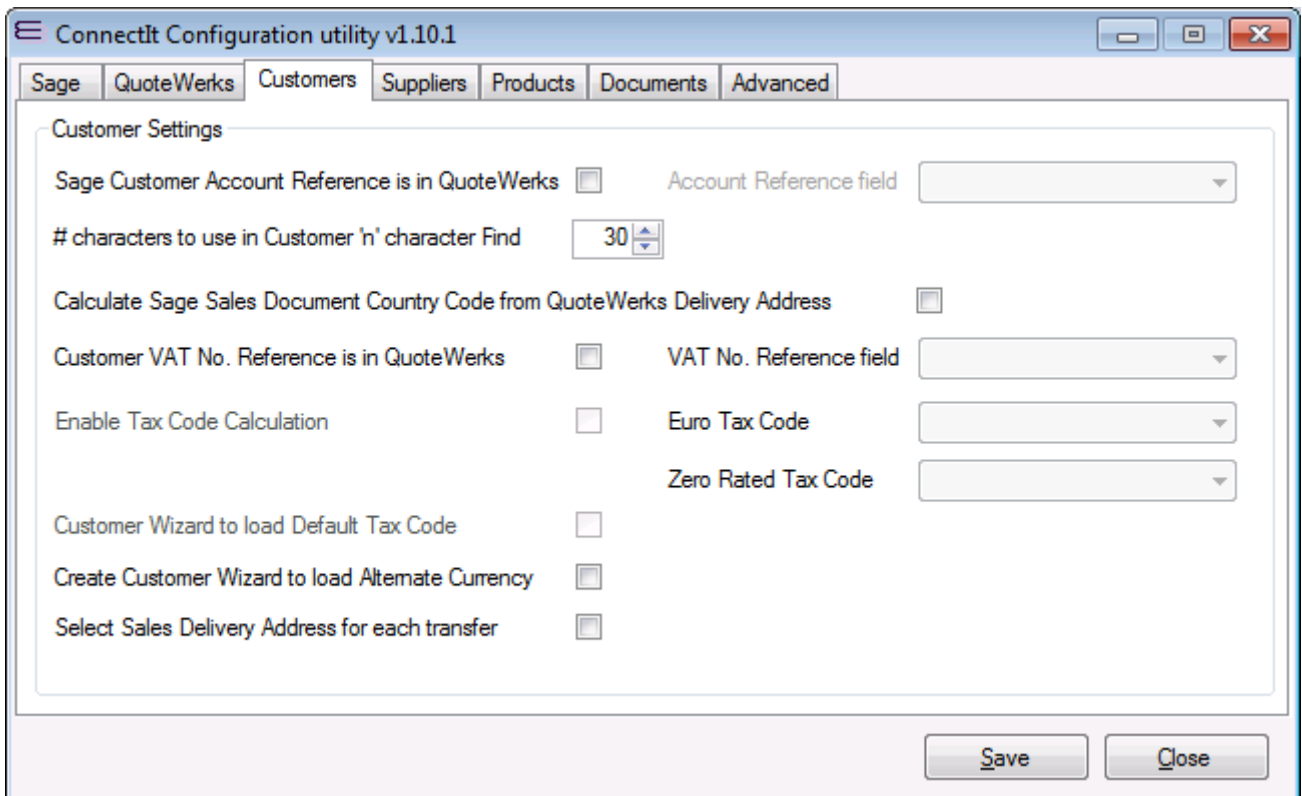
4. Click the **Test Connection** button to check that the settings are correct.

Note: On successful configuration, you will receive the message "Logon Information Tested OK!" If you do not receive this message, please check the details and try again.

5. Click the **Save** button to retain the settings on the **QuoteWerks** tab.

Customer Settings

The **Customers** tab provides options on how customer account information is matched and handled between **QuoteWerks** and **Sage**.

1.   If you have the **Sage Customer Account Reference** within the **QuoteWerks** document, then tick the **Sage Customer Account Reference is in QuoteWerks** box. Ticking the **Sage Customer Account Reference is in QuoteWerks** box enables the **Account Reference field** dropdown; select the appropriate custom field where the **Sage Customer Account Reference** is held.

Note: If, when transferring a document from QuoteWerks to Sage, the selected Account Reference field is blank or the account number detailed in the field cannot be found, the user will be prompted as to whether ConnectIt should perform searches on the Company Name in an attempt to find an account reference.

2.   The **# characters to use in Customer 'n' character Find** defines how many characters from the start of the **QuoteWerks Company Name** that **ConnectIt** will use in trying to find a match. Setting this value to the maximum 30 turns the 'n' character search off.

Note: For more details on how ConnectIt attempts to match the QuoteWerks Company Name to a Sage Account Reference, please refer to the ConnectIt online Knowledgebase.

3.   If you would like **ConnectIt** to calculate the correct **Sage Country Code** for the sales document in **Sage** from the Delivery Address in **QuoteWerks**, tick the **Calculate Sage Sales Document Country Code from QuoteWerks Delivery Address** box.

4.   If the customer's VAT number is within the **QuoteWerks** document, tick the **Customer VAT No. Reference is in QuoteWerks** box. Ticking the **Customer VAT No. Reference is in QuoteWerks** box will activate the **VAT No. Reference field** drop down list enabling you to select the **QuoteWerks** field that the customer's VAT number is held in. Once you have ticked the **Customer VAT No. Reference is in QuoteWerks** box the value from the **VAT No. Reference field** in **QuoteWerks** will then be transferred into the **Sage** sales document **Tax Number** field when transferring documents.

Note: When using the ConnectIt Create Customer in Sage wizard, the customer's VAT number will also be transferred from the selected QuoteWerks field into the VAT Number field in the Customer Record in Sage.

5.   Ticking the **Enable Tax Code Calculation** box will activate the **Euro Tax Code** and **Zero Rated Tax Code** boxes enabling the appropriate fields to be selected for these codes. Once **Enable Tax Code Calculation** is selected, **ConnectIt** will now calculate the tax code using the VAT Number and Delivery Address Country when the document is transferred to **Sage**.

Note: To enable this option to use the correct tax code during document creation, the VAT number for customers needs to be entered in the field selected in the VAT No. Reference field drop down list box.

6.   Once **Enable Tax Code Calculation** is selected, you now also have the option to set the **Create Customer Wizard to load Default Tax Code** which automatically calculates the Customer's Tax Code from the entry in the **VAT No. Reference field** and the selected **SoldTo/BillTo Country**.

7.   If when using the **Create Customer(s) in Sage Wizard**, you would like the **Alternate Currency** to be read from the **QuoteWerks** document for the new customer in **Sage**, then tick the **Create Customer Wizard to load Alternate Currency** box.

8.   If you would like to select the Delivery Address for each Sales Document from either **QuoteWerks** or **Sage**, tick the **Select Sales Delivery Address for each transfer** option box.

Note: If you choose to use the Invoice Address as the Delivery Address then Tax Code Calculation will be disabled for that document transfer as Sage overwrites the tax code values with the Customer's default information.

9.   Click the **Save** button to retain the settings on the **Customers** tab.

Supplier Settings

The **Suppliers** tab provides options on how supplier account information is matched and handled between **QuoteWerks** and **Sage**.

1. By default, **ConnectIt** understands the Supplier address information to be stored and maintained in **QuoteWerks**. When creating Purchase Order documents in **Sage**, **ConnectIt** will use the Supplier address information that is in the **QuoteWerks Vendors** database. If, however, your Supplier address information is stored and maintained in Sage, then tick the **Supplier Address information is maintained in Sage not QuoteWerks** option. **ConnectIt** will then use the Supplier address information from **Sage**.

2. If you have the **Sage Supplier Account Reference** within the **QuoteWerks Vendor** information, then tick the **Sage Supplier Account Reference is in QuoteWerks** box. Ticking the **Sage Supplier Account Reference is in QuoteWerks** box enables the **Account Reference field** dropdown; select the appropriate custom field where the **Sage Supplier Account Reference** is held.

Note: If, when transferring a document from QuoteWerks to Sage, the selected Account Reference field is blank or the account number detailed in the field cannot be found, the user will be prompted as to whether ConnectIt should perform searches on the Company Name in an attempt to find an account reference.
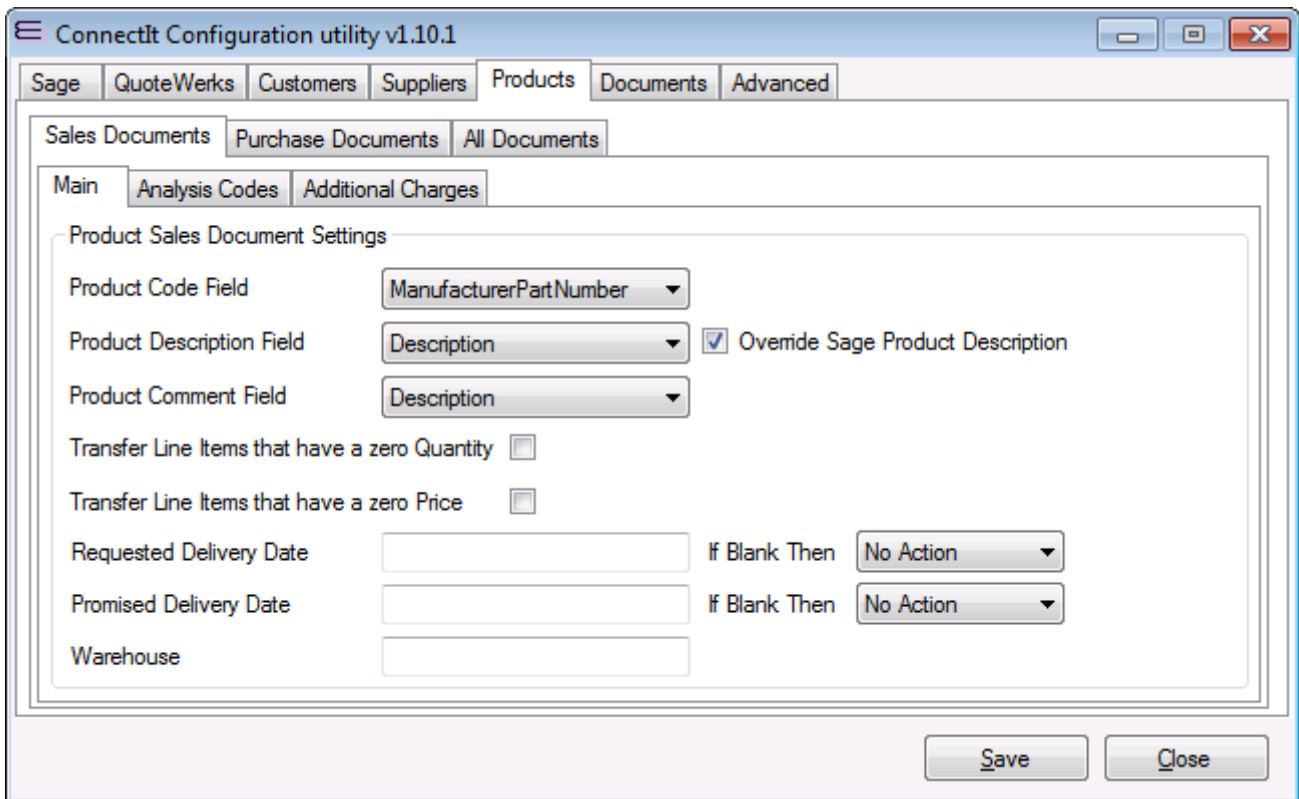
3. The **# characters to use in Supplier 'n' character Find** defines how many characters from the start of the **Company Name** in QuoteWerks that **ConnectIt** will use in trying to find an a match. Setting this value to the maximum 30 turns the 'n' character search off.

Note: For more details on how ConnectIt attempts to match the QuoteWerks Company Name to a Sage Account Reference, please refer to the ConnectIt online Knowledgebase.

4. Click the **Save** button to retain the settings on the **Suppliers** tab.

Product Settings (Sales Documents | Main)

The **Products | Sales Documents | Main** tab defines which fields from QuoteWerks are used when creating sales document types in **Sage** and how the product Document Line Items are transferred from **QuoteWerks** to **Sage**.

1. By default, **ConnectIt** uses the **Manufacturer Part Number** field in **QuoteWerks** to match with the product code in **Sage**. If you would prefer **ConnectIt** to use a different field in **QuoteWerks,** click the drop down list box to select an alternative, i.e. **Vendor Part Number**, **Custom Text 01–10** (product fields) etc.

2. By default, **ConnectIt** uses the **Description** field in **QuoteWerks** for the **Description** and **Comment** in **Sage**. If you would prefer **ConnectIt** to use different fields in **QuoteWerks,** click the drop down list box to select an alternative, i.e. **Notes**, **Custom Text 01–10** (product fields) etc.

3. To replace the default **Sage Product Description** with what has been entered in **QuoteWerks**, tick the **Override Sage Product Description** tick box.

4. By default, **ConnectIt** will not transfer line items from the **QuoteWerks** Document which have a zero Quantity or Price. To include these lines in the transfer, tick the **Transfer Line Items that have a zero Quantity** and/or **Transfer Line Items that have a zero Price** tick boxes.

5. If you require a product **Requested Delivery Date** and/or product **Promised Delivery Date** to be transferred to **Sage**, enter a **Macro,** such as **&QWDH_CustomDate01** or **&QWDI_CustomDate01** into the **Requested Delivery Date** and/or **Promised Delivery Date** fields.

For both Requested Delivery Date and Promised Delivery Date, there are options to take No Action, or Display a Warning or Fail the Transfer if either delivery date field is blank.

For full details of the macros available, please see the ConnectIt Knowledgebase Article 90.
Note that these Requested Delivery Date and Promised Delivery Date options will be greyed out and inactive if the Requested and Promised Delivery Date options have been enabled on the Documents | Sage Defaults tab.

6.   If you would like to specify the **Sage Warehouse Code** where an Item is supplied from, then enter a value into the **Warehouse** field. Both macros (such as **&QWDH_CustomText01**) and fixed values (such as "HOME") are supported.

Note that when used in conjunction with the Advanced tab | Document Transfer | Sage 200 | 'Suppress prompts that an Item is not available from the default Warehouse", then Stock values in Sage may become negative.

7.   Click the **Save** button to retain the settings on the **Products | Sales Documents | Main** tab.

Product Settings (Sales Documents | Analysis Codes)

The **Products | Sales Documents | Analysis Codes** tab defines which fields from **QuoteWerks** are used when transferring **Analysis Codes** to **Sage**.

1. By default, **ConnectIt** does not transfer values to the **Analysis Code** fields in **Sage** and the **Sage** defaults are applied to any **Analysis Code** fields you have set up. If you would prefer **ConnectIt** to transfer a value from a field in **QuoteWerks (Document Headers or Document Items),** enter a Macro into the appropriate **Analysis Code 1-6** field.

Note: If the QuoteWerks field specified in Analysis Code 1-6 is blank, no value will be transferred and the Sage default will be applied to the Analysis Code field in Sage. For full details of the macros available, please see the ConnectIt Knowledgebase Article 90.

2. Click the **Save** button to retain the settings on the **Products | Sales Documents | Analysis Codes** tab.

Product Settings (Sales Documents | Additional Charges)

The **Products | Sales Documents | Additional Charges** tab allows you to set up filtering to find specified **Manufacturer Part Number(s)** in **QuoteWerks** and rather than transferring these items as Product/Service lines, they are instead transferred as **Additional Charge** lines when the QuoteWerks document is created in **Sage**.
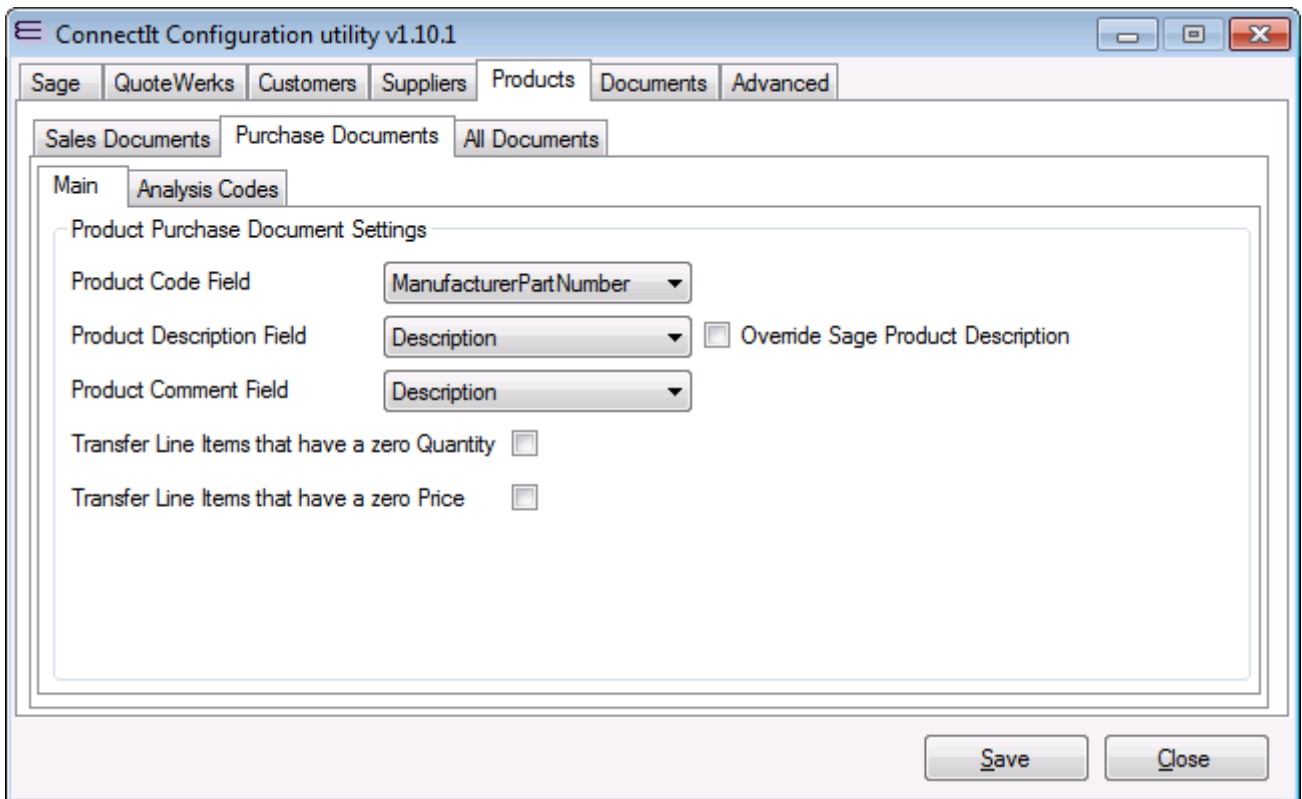

1. By default, Additional Charge filtering is turned off in **ConnectIt.** To enable it, tick the **Activate Additional Charge filtering** checkbox. This activates the other textboxes enabling you to enter the appropriate values as required.

2. Enter an appropriate character for the **Separator**. This character will separate multiple **Manufacturer Part Numbers** and therefore it should not be a character that is used in any of the specified **Manufacturer Part Numbers**. By default the **Separator** is the pipe character "|" because this is rarely used. You can leave this field as the default or change it if any of the **Manufacturer Part Numbers** contain the pipe character.

3. Enter the **Manufacturer Part Number(s)** you would like to be transferred to Sage as **Additional Charge** lines, separated by the character in the **Separator** field. If, for example, you would like to filter two products with **Manufacturer Part Numbers** of "Carriage" and "Air Freight", enter Carriage|Air Freight into the **Manufacturer Part Number(s)** field.

Note: The Manufacturer Part Numbers are case-sensitive and the items must already be set up as Additional Charges in Sage before ConnectIt can transfer them from QuoteWerks to Sage.

4. Click **Check Filters** to ensure that the **Manufacturer Part Number(s)** are being read correctly. A pop-up will appear with the list of **Manufacturer Part Numbers** showing you how they are being read so that you can make changes to your configuration options, if any are being read incorrectly.

5. Click the **Save** button to retain the settings on the **Products | Sales Documents | Additional Charges** tab.
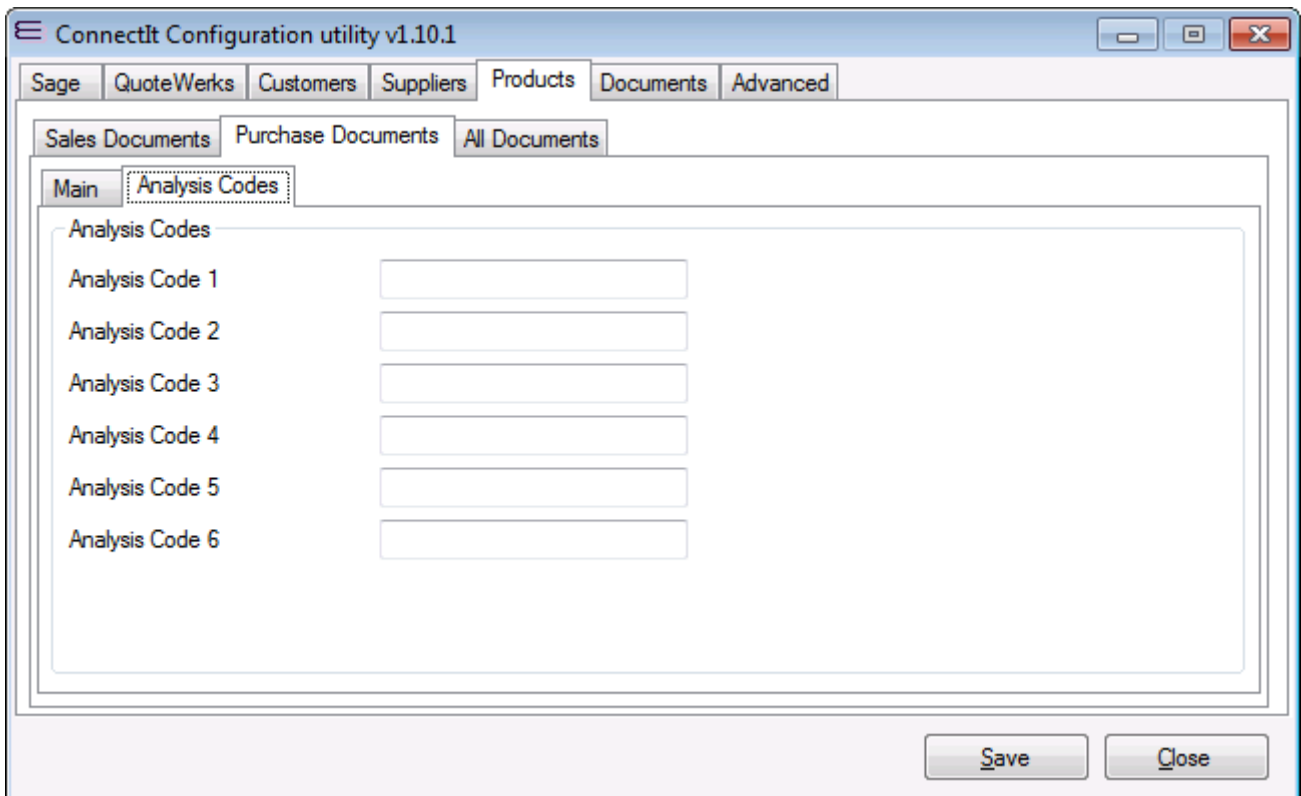
Product Settings (Purchase Documents | Main)

The **Products | Purchase Documents | Main** tab defines which fields from QuoteWerks are used when creating purchase document types in **Sage** and how the product Document Line Items are transferred from **QuoteWerks** to **Sage**.

1. By default, **ConnectIt** uses the **Manufacturer Part Number** field in **QuoteWerks** to match with the product code in **Sage**. If you would prefer **ConnectIt** to use a different field in **QuoteWerks,** click the drop down list box to select an alternative, i.e. **Vendor Part Number**, **Custom Text 01–10** (product fields) etc.

2. By default, **ConnectIt** uses the **Description** field in **QuoteWerks** for the **Description** and **Comment** in **Sage**. If you would prefer **ConnectIt** to use different fields in **QuoteWerks,** click the drop down list box to select an alternative, i.e. **Notes**, **Custom Text 01–10** (product fields) etc.

3. To replace the default **Sage Product Description** with what has been entered in **QuoteWerks**, tick the **Override Sage Product Description** tick box.

4. By default, **ConnectIt** will not transfer line items from the **QuoteWerks** Document which have a zero quantity or price. To include these lines in the transfer, tick the **Transfer Line Items that have a zero Quantity** and/or **Transfer Line Items that have a zero Price** tick boxes.

5. Click the **Save** button to retain the settings on the **Products | Purchase Documents** tab.

Product Settings (Purchase Documents | Analysis Codes)

The **Products | Purchase Documents | Analysis Codes** tab defines which fields from **QuoteWerks** are used when transferring analysis codes to **Sage**.
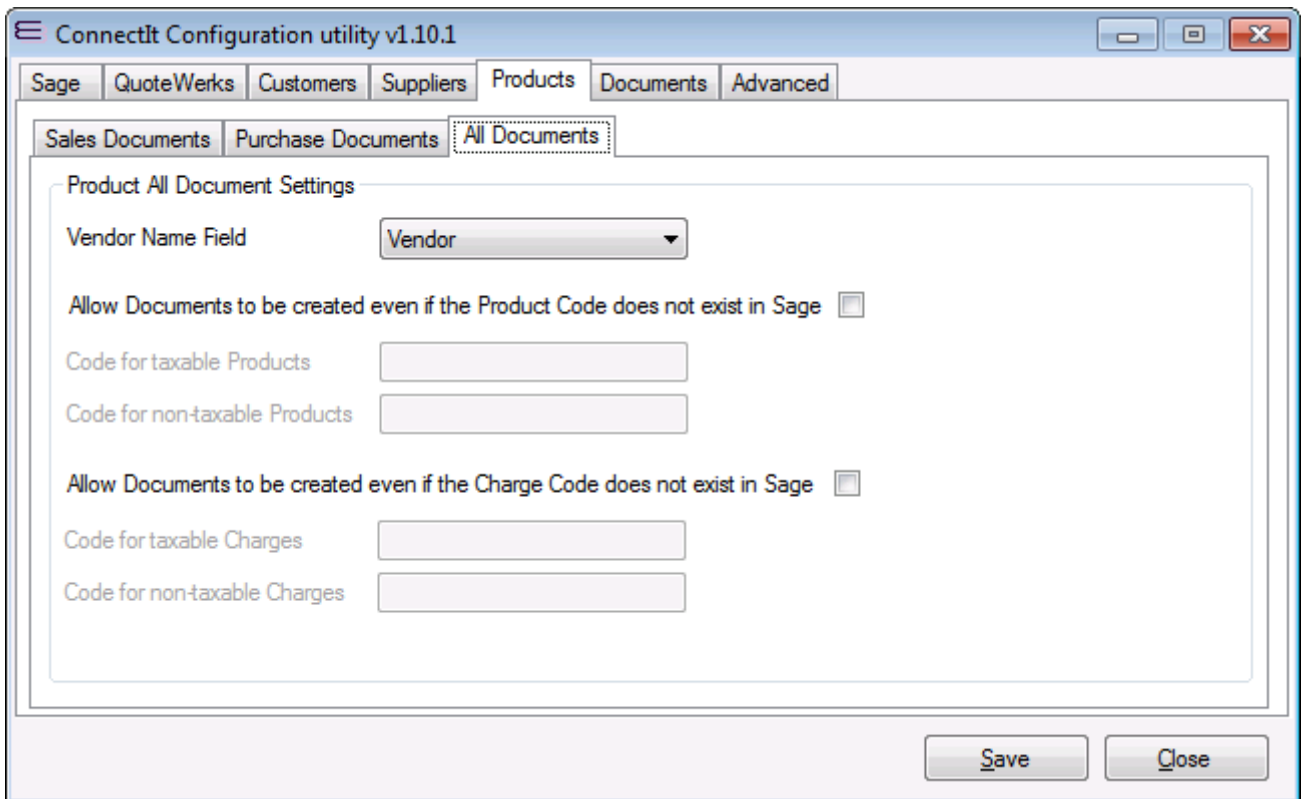

1. By default, **ConnectIt** does not transfer values to the **Analysis Code** fields in **Sage** and the **Sage** defaults are applied to any Analysis Code fields you have set up. If you would prefer **ConnectIt** to transfer a value from a field in **QuoteWerks (Document Headers or Document Items),** enter a Macro into the appropriate **Analysis Code 1- 6** field.

Note: If the QuoteWerks field specified in Analysis Code 1-6 is blank, no value will be transferred and the Sage default will be applied to the Analysis Code field in Sage. For full details of the macros available, please see the ConnectIt Knowledgebase Article 90.

2. Click the **Save** button to retain the settings on the **Products | Purchase Documents | Analysis Codes** tab.

Product Settings (All Documents tab)

The **Products | All Documents** tab enables codes to be defined for products that do not already exist in **Sage** so that the user does not have to create every product in **Sage** before documents can be transferred from **QuoteWerks** to **Sage**.

1. By default, **ConnectIt** uses the **Vendor** field in **QuoteWerks** to match with the Supplier Name in **Sage**. If you would prefer **ConnectIt** to use a different field in **QuoteWerks,** click the drop down list box to select an alternative, i.e. **Manufacturer**, **Custom Text 01–10** (product fields) etc.

2. By default, **ConnectIt** does not allow documents to be created if the **Product** or **Charge Code** specified does not exist in **Sage**. Tick the tick box if you would like documents to be created even if the **Product** or **Charge Code** does not exist in **Sage.**

3. If you have allowed documents to be created even if the **Product** or **Charge Code** specified does not exist in **Sage**, enter the default product codes for Taxable and Non-taxable products that are to be allocated to line items in **Sage**.

4. Click the **Save** button to retain the settings on the **Products** tab.

Document Settings (Main tab)

The **Documents | Main** tab offers options on how document information is handled between **QuoteWerks** and **Sage**.

1. If you want to retrieve the **Sage Document Number** back into **QuoteWerks**, ensure that the **Transfer Sage Document Number back to QuoteWerks** box is ticked. Alternatively, if after transferring the **QuoteWerks** document information to **Sage**, you do not wish the **Sage Document Number** to be transferred back to **QuoteWerks**, untick the **Transfer Sage Document Number back to QuoteWerks** tick box.

2. By default, the **Sage Sales Document Number** and/or **Purchase Document Number**(s) will be transferred back into **QuoteWerks' CustomText01** field. If you would prefer these to be transferred back into different fields, click the drop down list to select your preferred choice of the custom fields.

Note: If creating Back-to-Back Sales Order and Purchase Order documents in Sage, then both the Sales Order document number and the Purchase Order document numbers are returned to the specified field separated by a comma in the format "<SO#>, <PO#>".

If creating multiple Purchase Order documents in Sage, then the Purchase Order document numbers are returned to the specified field separated by a comma in the format "<PO1#>, <PO2#>, <PO3#>, etc."

3. If you want to store the date that the **QuoteWerks** document was created in **Sage**, ensure that the **Record Sage document creation date in QuoteWerks** box is ticked. Then select from the drop down list the custom field in **QuoteWerks** that you would like the date the document was created in **Sage** to be stored in. Alternatively, if after transferring the **QuoteWerks** document information to **Sage**, you do not wish the **Sage Document Date** to be stored, untick the **Record Sage document creation date in QuoteWerks** tick box.

4. If you want **ConnectIt** to update the **QuoteWerks** document date to the transfer date, ensure that the **Amend the document date to today's date before transfer** box is ticked. **ConnectIt** will update the **QuoteWerks** document **Sales Info** tab **Date** field to the current system date before transferring the information from **QuoteWerks** to **Sage**. This will result in both the **QuoteWerks** document and the **Sage** document showing the current date when the transfer has completed successfully.

5. By default **ConnectIt** works out foreign currency values by using the standard QuoteWerks fields multiplied by the exchange rate source that has been specified above. If you would like to use the Alternate Currency fields from **QuoteWerks** then tick **Use Alternate Currency fields for foreign currency documents**.

6. If you would like **ConnectIt** to check that a valid **Tax Rate** has been set on the **QuoteWerks Document**, then list the permitted values in the **Allowed Tax Rates** box. Permitted **Tax Rate** values should be separated by pipe characters ("|"). By default, 0% and 20% should be the allowed values, set as "0|20" in the option text box. If you do not want **ConnectIt** to check the **Tax Rate**, then leave this option blank.

7. Click the **Save** button to retain the settings on the **Documents (Main)** tab.

Document Settings (Sage Defaults tab)

The **Documents | Sage Defaults** tab provides options to force default values into the **Sage** document fields.

1. Enter the **Default Currency Code** for your country**.**

2. Check the **Sales Document Defaults** and change as appropriate.

3. If you require a requested delivery date or promised delivery date to be transferred to **Sage**, enter a **Macro** into **Requested Delivery Date** and/or **Promised Delivery Date**.

For full details of the macros available, please see the ConnectIt Knowledgebase article 90.
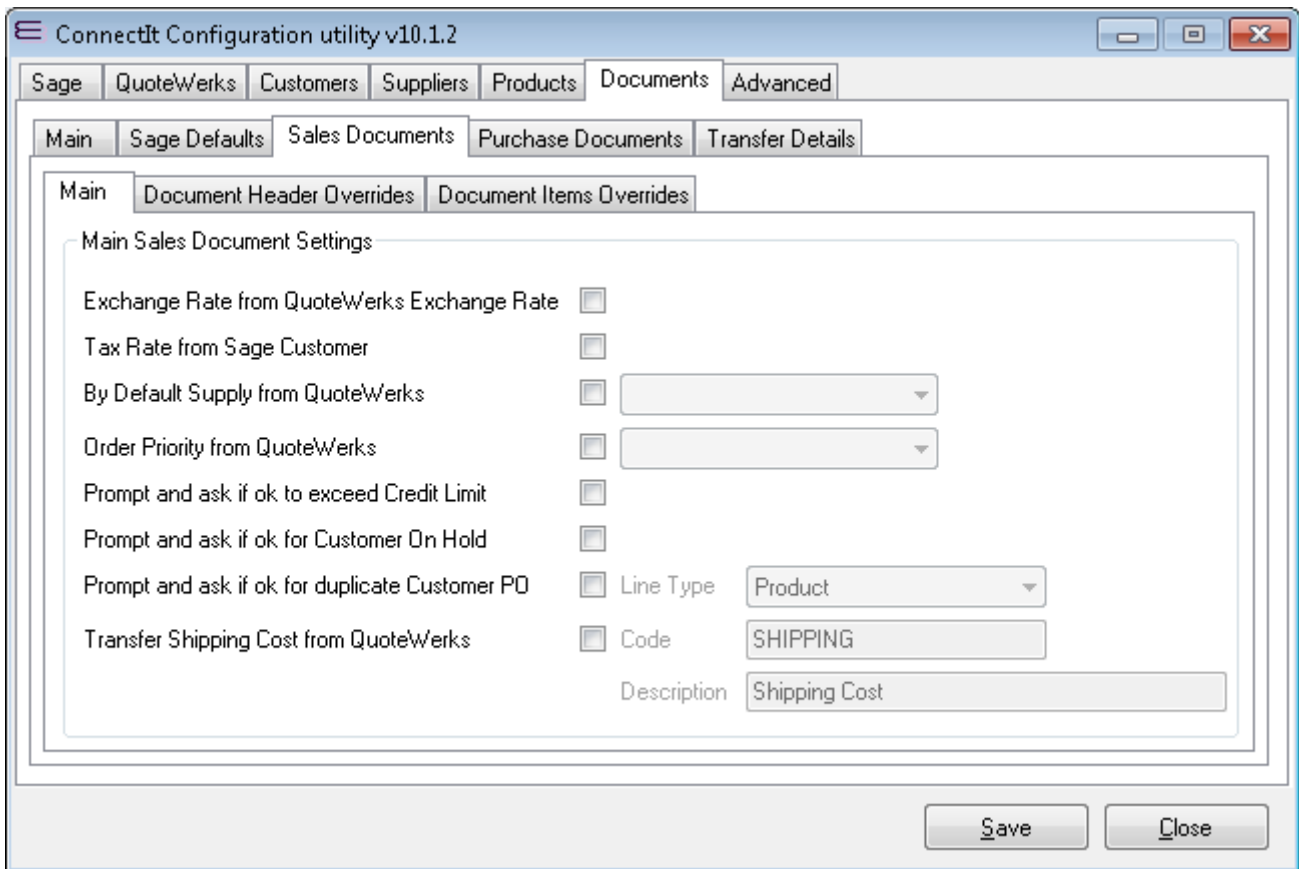
4. If you would like the specified **Requested Delivery Date** and/or **Promised Delivery Date** values to be used for the **Sage** Line Item **Requested Delivery Date** and/or **Promised Delivery Date** values too, then also tick the appropriate **Transfer to Line Items also** checkbox.

Note that if Requested Delivery Date and Promised Delivery Date are activated here on the Documents | Sage Defaults tab, they are automatically deactivated on the Products | Sales Documents | Main tab.

5. Click the **Save** button to retain the settings on the **Documents (Sage Defaults)** tab.

Document Settings (Sales Documents | Main tab)

The **Documents | Sales Documents | Main** tab offers options on how document information is handled between **QuoteWerks** and **Sage**.

1. If you want to use the currency exchange rate from **QuoteWerks** for the **Sage** sales document, then tick the **Exchange Rate from QuoteWerks Exchange Rate** tick box. Alternatively, to use the current exchange rate set in **Sage**, leave the box unticked.

2. If you want to use the tax rate from the **Sage Customer** record for sales documents, then tick the **Sales Order Tax Rate from Sage Customer** tick box. Alternatively, to use the tax rate set in **QuoteWerks**, leave the box unticked.

3. If you want to specify in **QuoteWerks** where by default stock is to be supplied from, tick the **By Default Supply from QuoteWerks** box and then select the **QuoteWerks** field which contains the default **Warehouse** name.

4. If you want to specify in **QuoteWerks** the **Order Priority** in **Sage**, tick the **Order Priority from QuoteWerks** box and then select the **QuoteWerks** field which contains the **Order Priority** information.

5. If you want to be prompted that transferring the current **QuoteWerks** document into **Sage** would cause the customer to exceed their **Credit Limit** in **Sage**, then tick the **Prompt and ask if ok to exceed Credit Limit** box. **ConnectIt** will then ask if you wish to proceed with the document transfer or cancel the transfer.

6. If you want to be prompted that the **Customer** record in **Sage** is flagged as being On Hold, then tick the **Prompt and ask if ok for Customer On Hold** box. ConnectIt will then ask if you wish to proceed with the document transfer or cancel the transfer.

7. If you want to be prompted that the **Customer PO** on the **QuoteWerks** document is blank or has already been used on a **Sage** Sales document that you are about to create, then tick the **Prompt and ask if ok for duplicate Customer PO** box. ConnectIt will then ask if you wish to proceed with the document transfer or cancel the transfer.

8. If you want to copy the Shipping Cost value from QuoteWerks into a Sage Additional Charge Item Line, then tick the **Transfer Shipping Cost from QuoteWerks** option. Ticking this option will then enable the **Shipping Cost Code** and **Description** fields so that the appropriate values can be set.

The Shipping Cost Code must already exist as an Additional Charge Line Type in Sage or the line may not be created in Sage.

9. Click the **Save** button to retain the settings on the **Documents (Sales Documents)** tab.

Document Settings (Sales Documents | Document Header Overrides tab)

The **Documents | Sales Documents | Document Header Overrides** tab offers options to modify the default field mappings that **ConnectIt** uses when transferring information from **QuoteWerks** to **Sage**.

1. The **Sage Override Fields** text entry box is a pipe-separated list of the Sage Field Name(s) which you would like ConnectIt to write to.

2. The **Override Values** text entry box is a pipe-separated list of the values which you would like ConnectIt to write. Note that static specific values and "&QWDH_" macros are supported.

3. The **Override Blanks** text entry box is a list of captions "True" and/or "False" pipe-separated list to indicate whether you would like ConnectIt to write an Override value if it is empty.

All values should be separated by a pipe ("|") character.

Values may include spaces at the beginning or end but these are trimmed when read by ConnectIt.

For full details of the macros available, please see the ConnectIt Knowledgebase article 90.

Document Settings (Sales Documents | Document Items Overrides tab)

The **Documents** | **Sales Documents** | **Document Items Overrides** tab offers options to modify the default field mappings that **ConnectIt** uses when transferring information from **QuoteWerks** to **Sage**.

1. The **Sage Override Fields** text entry box is a pipe-separated list of the Sage Field Name(s) which you would like ConnectIt to write to.

2. The **Override Values** text entry box is a pipe-separated list of the values which you would like ConnectIt to write. Note that static specific values, "&QWDH_" and "&QWDI_" macros are supported.

3. The **Override Blanks** text entry box is a list of captions "True" and/or "False" pipe-separated list to indicate whether you would like ConnectIt to write an Override value if it is empty.
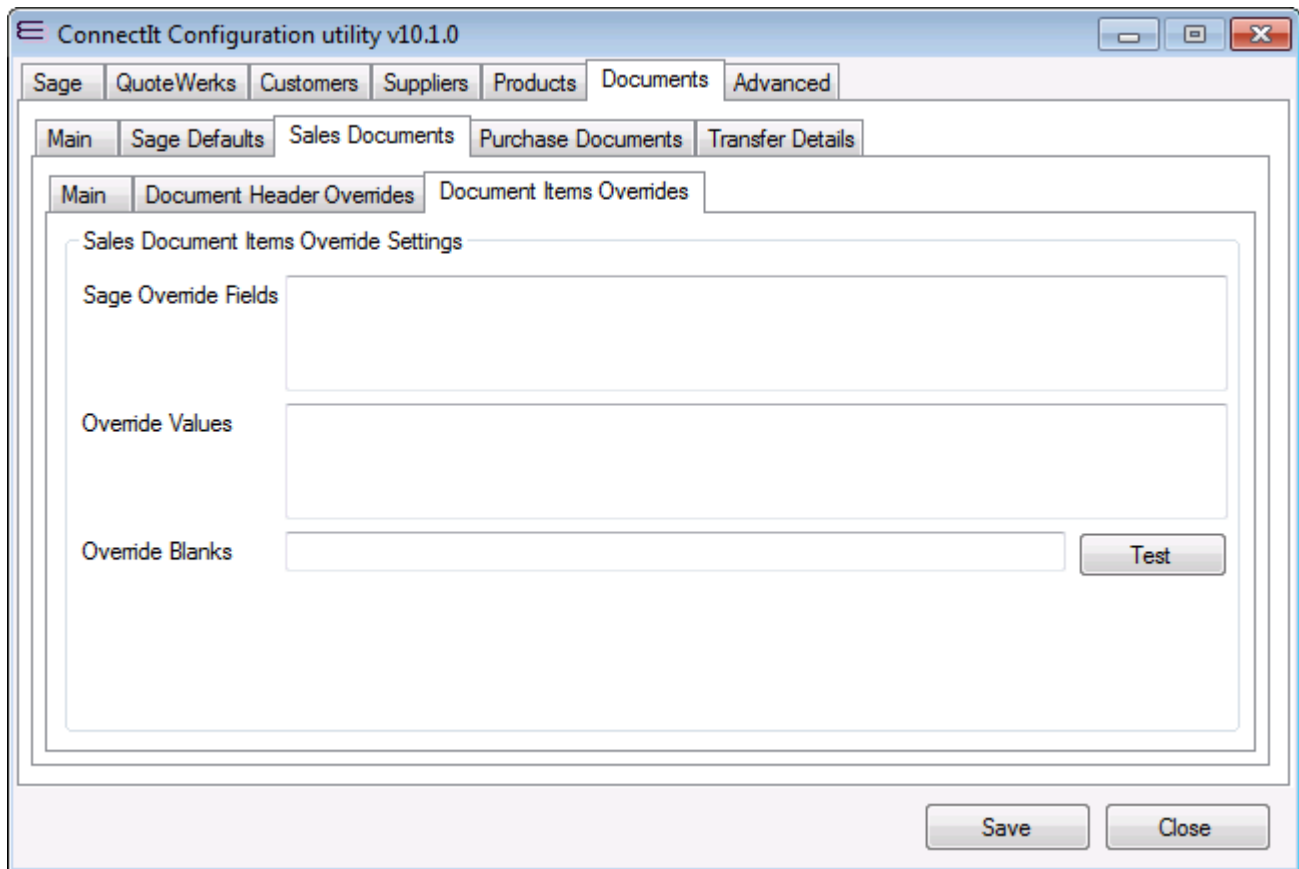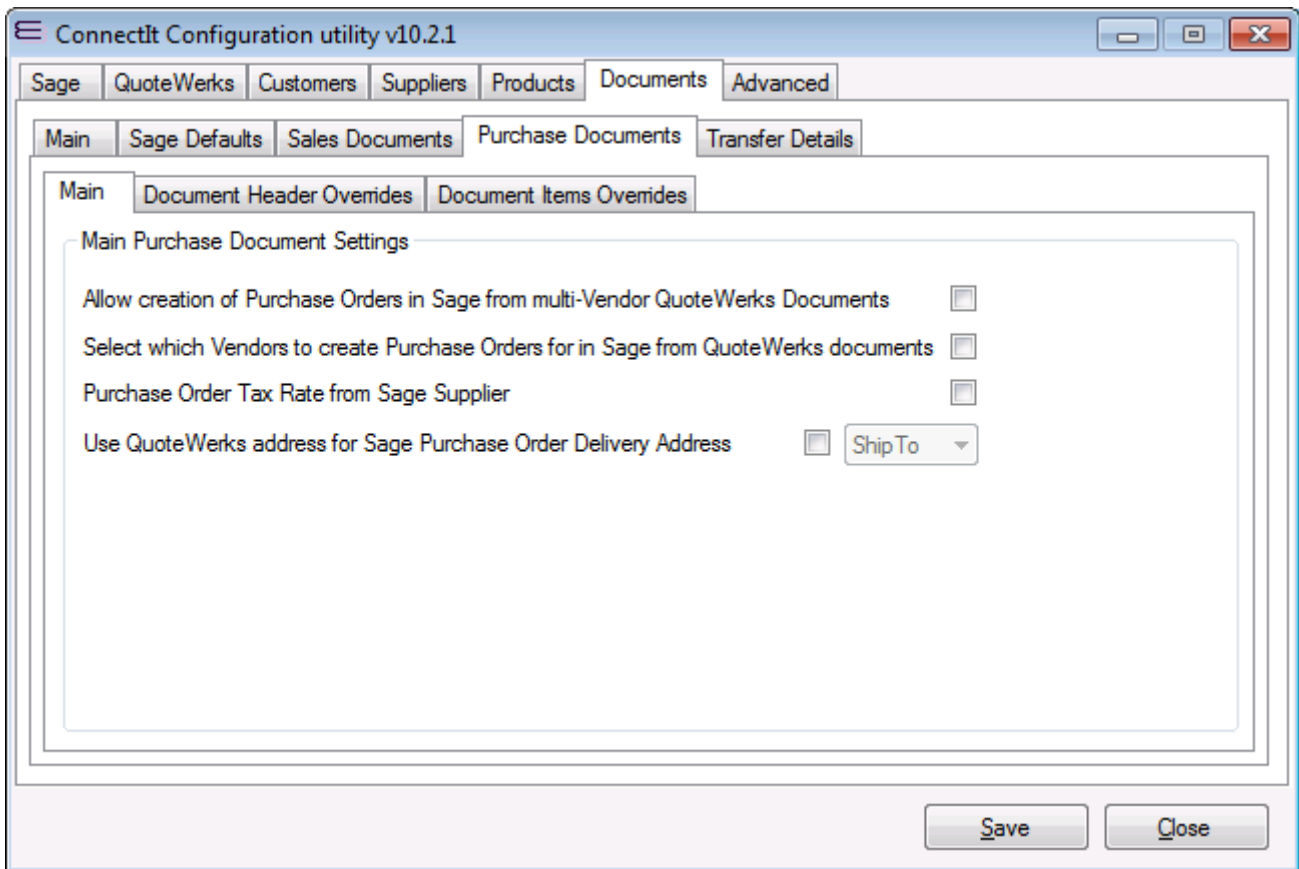
All values should be separated by a pipe ("|") character.

Values may include spaces at the beginning or end but these are trimmed when read by ConnectIt.

For full details of the macros available, please see the ConnectIt Knowledgebase article 90.

Document Settings (Purchase Documents | Main tab)

The **Documents | Purchase Documents | Main** tab offers options on how document information is handled between **QuoteWerks** and **Sage**.

1. If you want to allow **ConnectIt** to create multiple **Purchase Orders** when there is more than one **Vendor** listed against **Products** on the **QuoteWerks** document, ensure that the **Allow creation of Purchase Orders in Sage from multi-Vendor QuoteWerks documents** box is ticked. Alternatively, if you would prefer **ConnectIt** not to create **Sage** documents from **QuoteWerks** documents with multiple **Vendors** listed, then untick the box.

2. If you want to select which Vendors **ConnectIt** creates **Purchase Orders** for, then tick the **Select which Vendors to create Purchase Orders for in Sage from QuoteWerks documents** tick box. Alternatively, if you would prefer **ConnectIt** to create Purchase Orders for all Vendors then untick the box.

3. If you want to use the tax rate from the **Sage Supplier** record for purchase documents, then tick the **Purchase Order Tax Rate from Sage Supplier** tick box. Alternatively, to use the tax rate set in **QuoteWerks**, untick the box.

4. If you want to use one of the addresses on the **QuoteWerks** document for the Purchase Order document Delivery Address in **Sage**, then tick the **Use QuoteWerks address for Sage Purchase Order Delivery Address** option and select the appropriate **SoldTo**, **ShipTo** or **BillTo** option from the dropdown. Alternatively to leave the

5. Click the **Save** button to retain the settings on the **Documents (Purchase Documents)** tab.

Document Settings (Purchase Documents | Document Header Overrides tab)

The **Documents | Purchase Documents | Document Header Overrides** tab offers options to modify the default field mappings that **ConnectIt** uses when transferring information from **QuoteWerks** to **Sage**.

1. The **Sage Override Fields** text entry box is a pipe-separated list of the Sage Field Name(s) which you would like ConnectIt to write to.

2. The **Override Values** text entry box is a pipe-separated list of the values which you would like ConnectIt to write. Note that static specific values and "&QWDH_" macros are supported.

3. The **Override Blanks** text entry box is a list of captions "True" and/or "False" pipe-separated list to indicate whether you would like ConnectIt to write an Override value if it is empty.

All values should be separated by a pipe ("|") character.

Values may include spaces at the beginning or end but these are trimmed when read by ConnectIt.

For full details of the macros available, please see the ConnectIt Knowledgebase article 90.
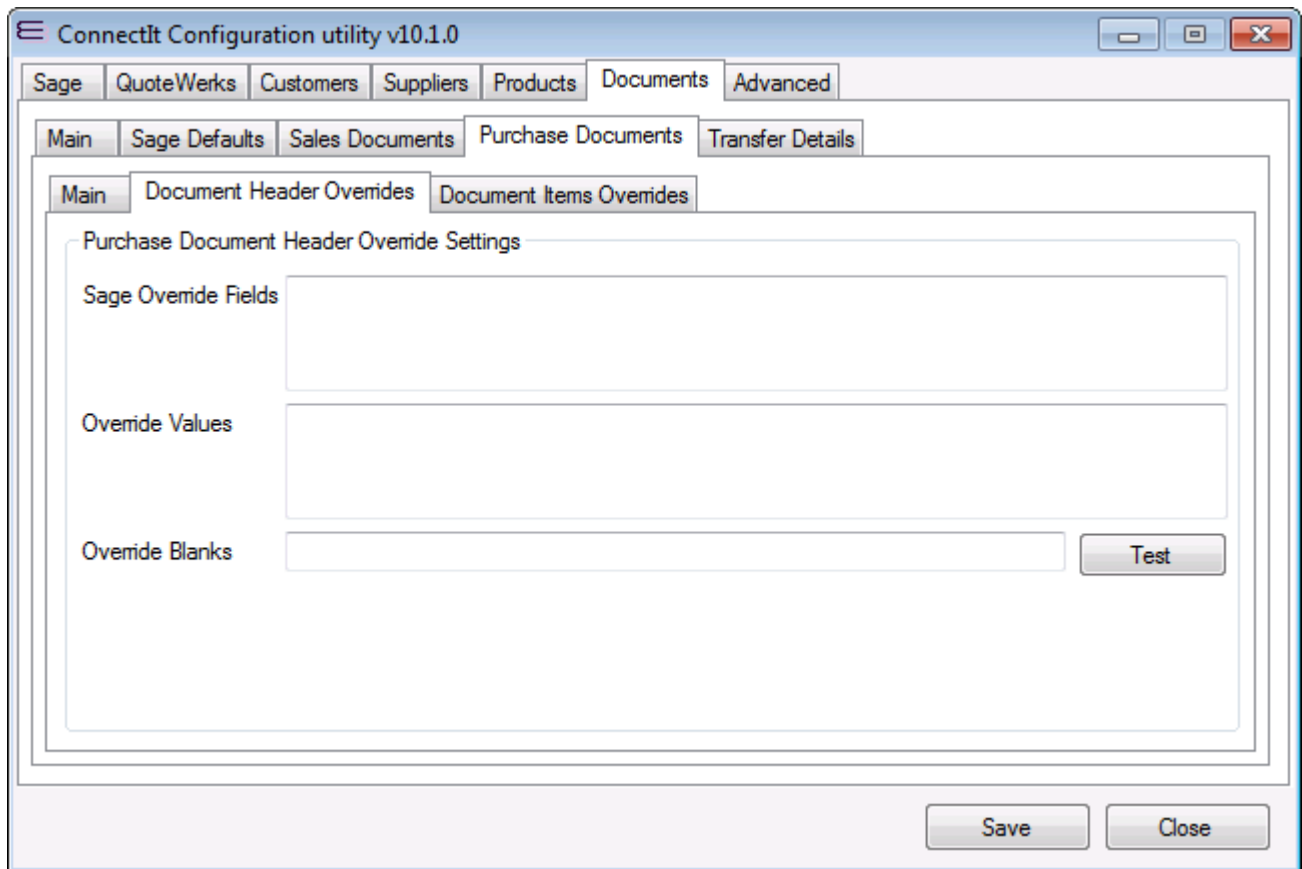
Document Settings (Purchase Documents | Document Item Overrides tab)

The **Documents | Purchase Documents | Document Item Overrides** tab offers options to modify the default field mappings that **ConnectIt** uses when transferring information from **QuoteWerks** to **Sage**.

1. The **Sage Override Fields** text entry box is a pipe-separated list of the Sage Field Name(s) which you would like ConnectIt to write to.

2. The **Override Values** text entry box is a pipe-separated list of the values which you would like ConnectIt to write. Note that static specific values, "&QWDH_" and "&QWDI_" macros are supported.

3. The **Override Blanks** text entry box is a list of captions "True" and/or "False" pipe-separated list to indicate whether you would like ConnectIt to write an Override value if it is empty.
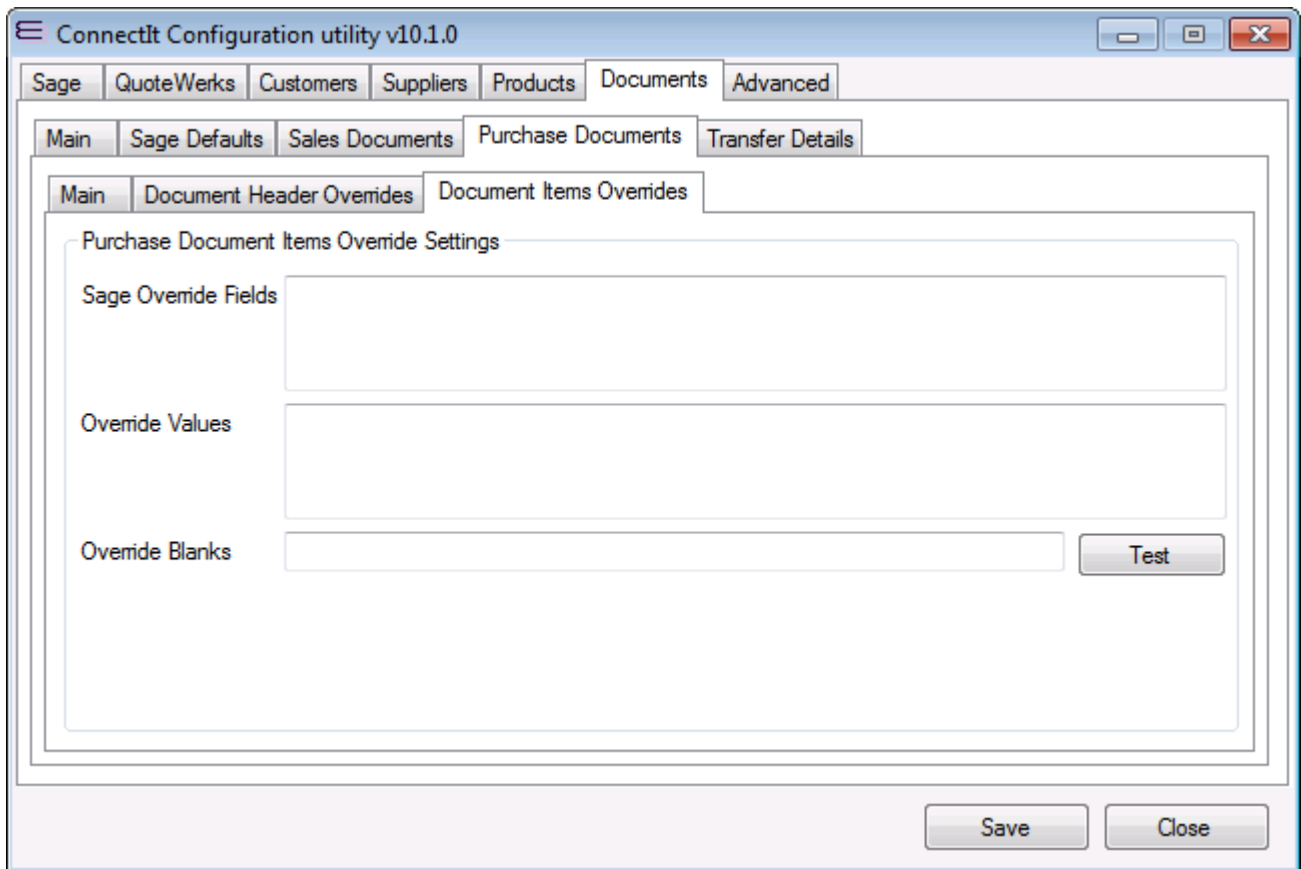
All values should be separated by a pipe ("|") character.

Values may include spaces at the beginning or end but these are trimmed when read by ConnectIt.

For full details of the macros available, please see the ConnectIt Knowledgebase article 90.

Document Settings (Transfer Details tab)

The **Documents | Transfer Details** tab provides options on the combinations of **QuoteWerks** document **Types** and **QuoteWerks Starting Status** to define which **Sage** document type(s) are created.

1. The **QW Doc Type** column enables the user to select which **QuoteWerks** document type(s) can be created in Sage. To configure the document type(s) you wish to create in Sage, select the document type from the drop down list in the **QW Doc Type** column, i.e. **QUOTE, ORDER** or **INVOICE**.

2. The **QW Starting Status** column is used during the validation process to ensure that documents can only be created in **Sage** if they are of a certain status in **QuoteWerks**, i.e. by default an order must have a status of **Order Ready for Sage** in **QuoteWerks** before it can be created in **Sage**.

3. The **QW Ending Status** column shows the status of the document in **QuoteWerks** after the information has been transferred to **Sage**, i.e. by default a product order has its **Status** changed to **Order Created in Sage**.

4. The **Sage Doc Type** column enables the user to select the type of document that is to be created in **Sage** from the **QuoteWerks** document. The document type, i.e. **Sales Order, Sales Invoice**, etc can be selected from the drop down list box.

5. The **+/-** column enables the user to specify whether negative values are being used in **QuoteWerks**. If the box is ticked, **ConnectIt** will change the sign in the corresponding document from plus to minus, or from minus to plus. If the box is not ticked, **ConnectIt** will not change the sign.

Note: It is necessary to have the correct +/- sign in the Change column because Credit Notes are generally created in different ways in QuoteWerks and in Sage – the document values are negative in QuoteWerks but positive in Sage. To ensure that the sales reporting is accurate in QuoteWerks, credit notes must be created as invoices with negative values.

It is necessary therefore as part of the ConnectIt Configuration to check that the sign for each document type is correct and to change it if necessary to ensure that all documents are created correctly in Sage.

6. The **Active** column enables the user to activate and deactivate the document types that can and cannot be created in **Sage**. If you require the ability to create a certain document type, ensure that there is a tick

in the appropriate box in the **Active** column for that particular document type. To prevent certain document types being created, click the tick box to deactivate it so that the box is not ticked.

7. The **Address** and **Delivery Address** columns enable the user to specify which of the **QuoteWerks Sold To, Ship To, Bill To** address fields are used when transferring the information into **Sage**. The **Address** column transfers to the **Sage** Address on the **Details** tab of a document and the **Delivery Address** transfers to the **Sage Delivery Address** on the **Order Details** tab.

8. **Sales Doc Exclude** allows you to specify if excluded document item lines in **QuoteWerks** are transferred for sales and purchase documents.

9. **Sales Doc Don't Print** allows you to specify if don't print document item lines in **QuoteWerks** are transferred for sales documents.

10. **Sales Doc Charge** allows you to specify if charge document item lines in **QuoteWerks** are transferred for sales documents.

11. **Sales Doc Discount** allows you to specify if discount document item lines in **QuoteWerks** are transferred for sales documents.

12. **Sales Doc Comment** allows you to specify if comment document item lines in **QuoteWerks** are transferred for sales documents.

13. **Sales Doc Group Header** allows you to specify if group header document item lines in **QuoteWerks** are transferred for sales documents.

14. **Sales Doc Sub Total** allows you to specify if sub total document item lines in **QuoteWerks** are transferred for sales documents.

15. **Sales Doc Running Sub Total** allows you to specify if running sub total document item lines in **QuoteWerks** are transferred for sales documents.

16. If you require Picking List Comments to be transferred to **Sage**, enter a **Macro** into **Sales Doc Picking List Comment.**

For full details of the macros available, please see the ConnectIt Knowledgebase article 90.

17. If you require Despatch Note Comments to be transferred to **Sage**, enter a **Macro** into **Sales Doc Despatch Note Comment.**

For full details of the macros available please see the ConnectIt Knowledgebase article 90.

18. If you require document level Analysis Codes to be transferred to **Sage**, enter a **Macro** into the **Sales Doc Analysis Code 1-6** fields.

For full details of the macros available please see the ConnectIt Knowledgebase article 90.

19. Click the **Save** button to retain the settings on the Document Settings (Transfer Details) tab.

20. **Purchase Doc Exclude** allows you to specify if excluded document item lines in **QuoteWerks** are transferred for purchase documents.

21. **Purchase Doc Don't Print** allows you to specify if don't print document item lines in **QuoteWerks** are transferred for purchase documents.

22. **Purchase Doc Charge** allows you to specify if charge document item lines in **QuoteWerks** are transferred for purchase documents.

23. **Purchase Doc Discount** allows you to specify if discount document item lines in **QuoteWerks** are transferred for purchase documents.

24. **Purchase Doc Comment** allows you to specify if comment document item lines in **QuoteWerks** are transferred for purchase documents.

25. **Purchase Doc Group Header** allows you to specify if group header document item lines in **QuoteWerks** are transferred for purchase documents.

26. **Purchase Doc Sub Total** allows you to specify if sub total document item lines in **QuoteWerks** are transferred for purchase documents.

27. **Purchase Doc Running Sub Total** allows you to specify if running sub total document item lines in **QuoteWerks** are transferred for purchase documents.

28. If you require Picking List Comments to be transferred to **Sage**, enter a **Macro** into **Purchase Doc Picking List Comment**.

For full details of the macros available please see the ConnectIt Knowledgebase article 90.

29. If you require Despatch Note Comments to be transferred to **Sage**, enter a **Macro** into **Purchase Doc Despatch Note Comment**.

For full details of the macros available please see the ConnectIt Knowledgebase article 90.

30. If you require document level Analysis Codes to be transferred to **Sage**, enter a **Macro** into the **Purchase Doc Analysis 1-6** fields.

For full details of the macros available please see the ConnectIt Knowledgebase article 90.

31. Click the **Save** button to retain the settings on the **Document Settings (Transfer Details)** tab.

Advanced Settings (Document Transfer | QuoteWerks tab)

The **Advanced | Document Transfer | QuoteWerks** tab provides options to suppress the warning messages that the **ConnectIt** applications generate when processing information from the **QuoteWerks** document.

Please note that suppressing these warning messages is not recommended and may lead to the user missing important feedback when sending information from QuoteWerks to Sage.
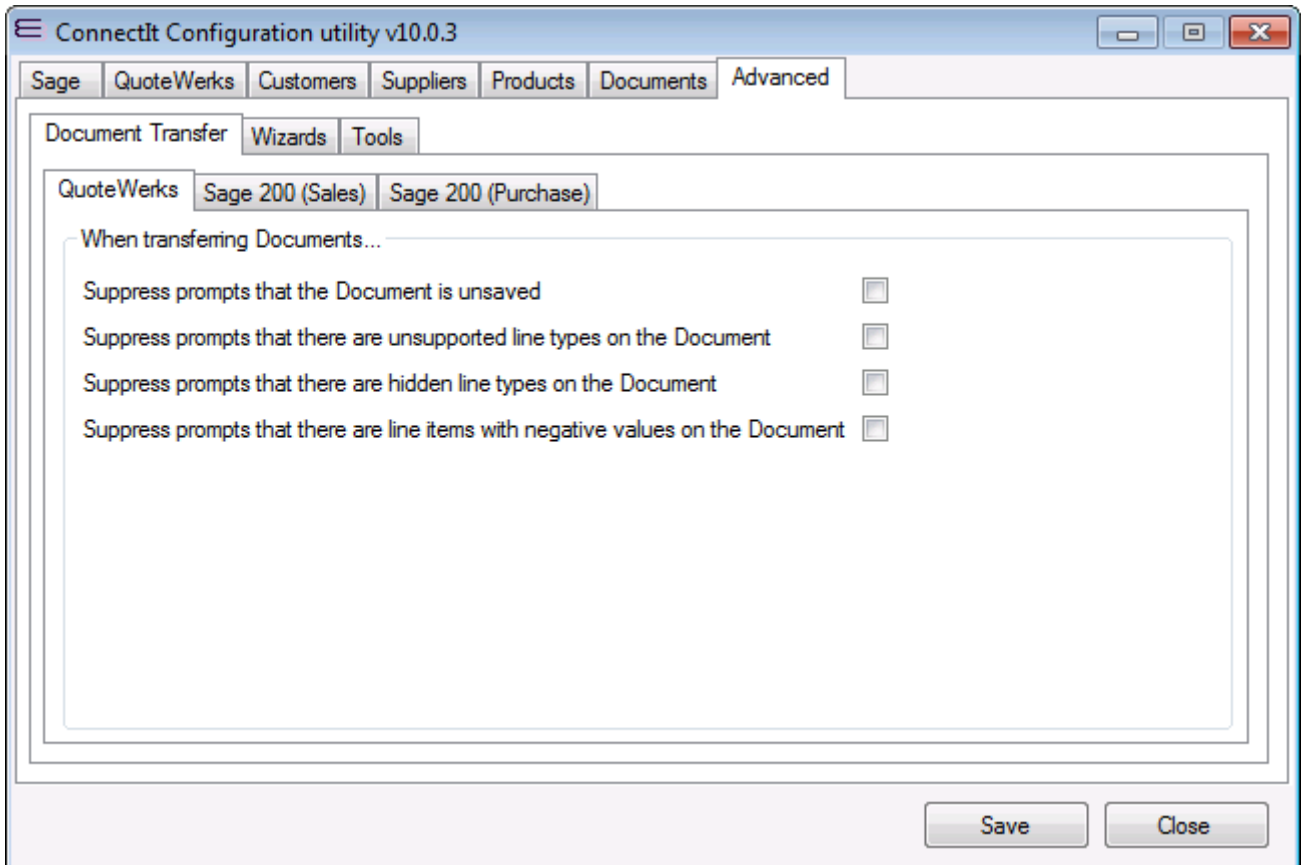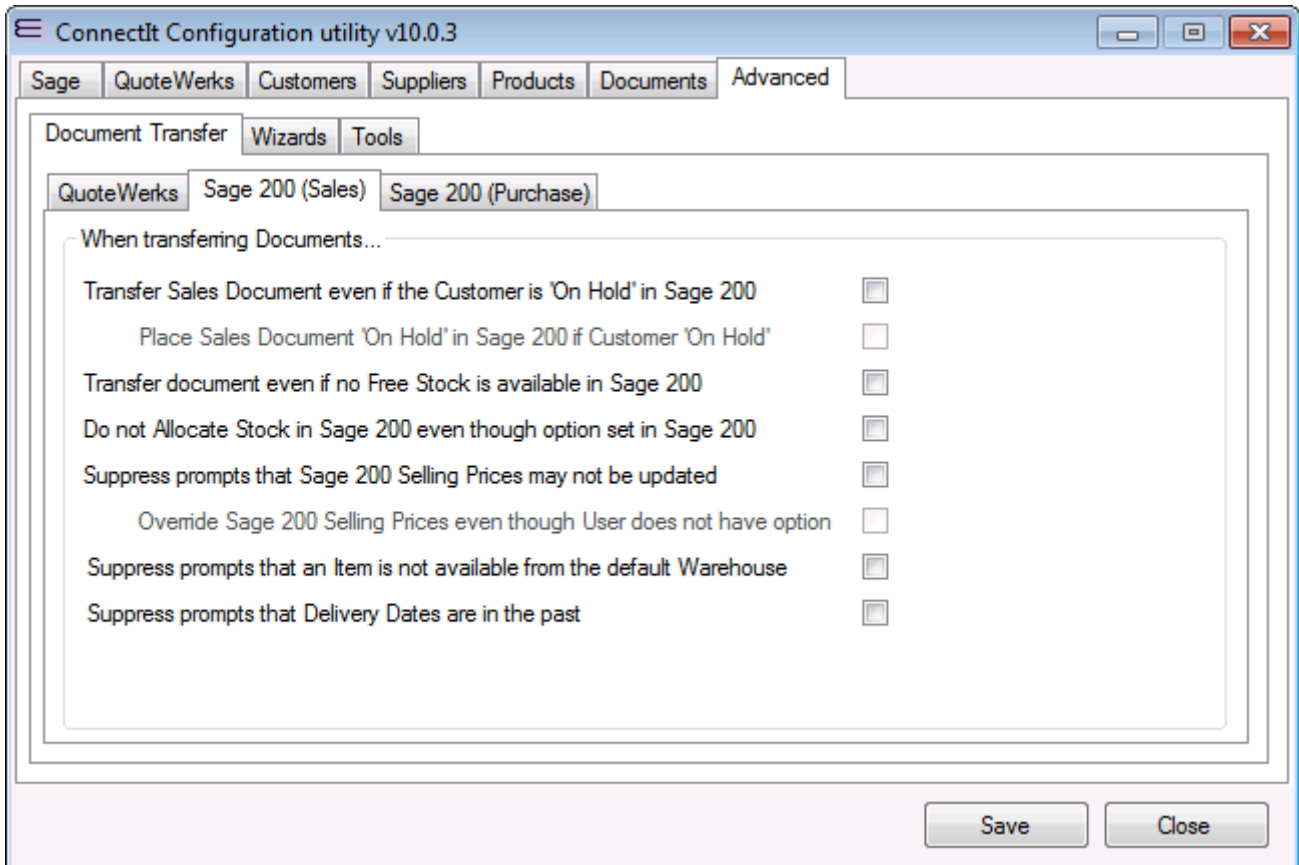

1. When transferring **QuoteWerks** document information into **Sage**, you will be prompted by **ConnectIt** if the current document is unsaved. If you would prefer not to be prompted, then tick the box to suppress the prompt.

2. When transferring **QuoteWerks** document information into **Sage**, you will be prompted by **ConnectIt** if the current document contains unsupported line types. If you would prefer not to be prompted, then tick the box to suppress the prompt.

3. When transferring **QuoteWerks** document information into **Sage**, you will be prompted by **ConnectIt** if the current document contains hidden line types. If you would prefer not to be prompted, then tick the box to suppress the prompt.

4. When transferring **QuoteWerks** document information into **Sage**, you will be prompted by **ConnectIt** if the current document has line items with negative values. If you would prefer not to be prompted, then tick the box to suppress the prompts.

5. Click the **Save** button to retain the settings on the **Advanced | Document Transfer | QuoteWerks** tab.

Advanced Settings (Document Transfer | Sage 200 (Sales) tab)

The **Advanced | Document Transfer | Sage 200 (Sales)** tab provides options to suppress the warning messages that the **ConnectIt** applications generate when processing information into the **Sage 200** document.

Please note that suppressing these warning messages is not recommended and may lead to the user missing important feedback when sending information from QuoteWerks to Sage.
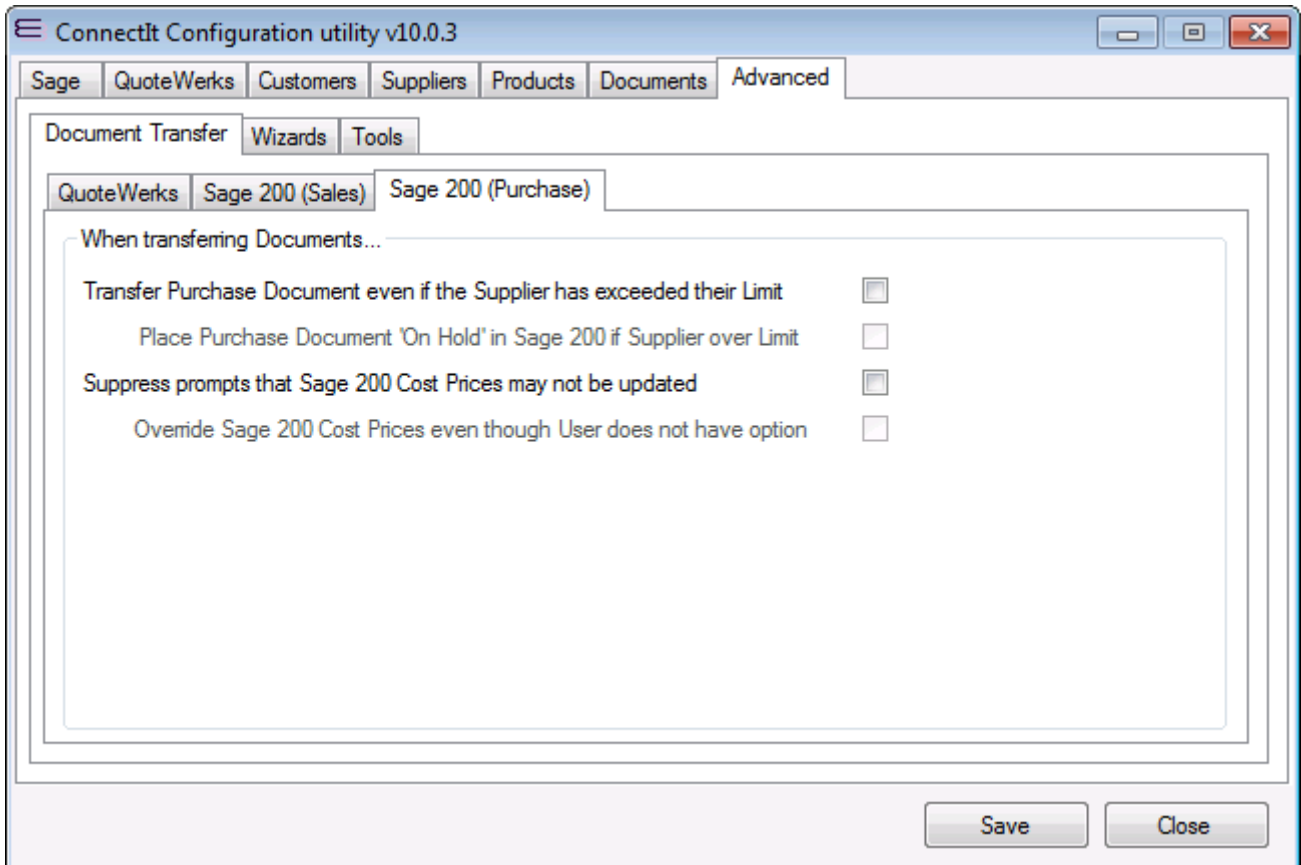

1. When transferring **QuoteWerks** document information into **Sage**, if the Customer is on hold in **Sage** the transfer will fail. If you would like **ConnectIt** to transfer the Document even if the Customer is on hold in **Sage,** then tick **Transfer Document even if the Customer is 'On Hold' in Sage 200**. This will then enable the option to put the Sales Document 'On Hold'; if you would like ConnectIt to place the Sales Document 'On Hold' then tick the **Place Sales Document 'On Hold' in Sage 200 if Customer 'On Hold'** option.

2. When transferring **QuoteWerks** document information into **Sage**, if there is no free stock available in **Sage** for a product the transfer will fail. If you would like **ConnectIt** to transfer the document even if there is no free stock available, then tick **Transfer document even if no free stock is available in Sage 200.**

3. When transferring **QuoteWerks** document information into **Sage**, if you do not want Stock to be Allocated then tick the **Do not Allocate Stock in Sage 200 even though option set in Sage 200** option.

4. When transferring **QuoteWerks** document information into **Sage**, you will be prompted by **ConnectIt** if the **Sage** login does not have permission to change Selling and/or Cost Prices. If you would prefer not to be prompted, then tick the **Suppress prompts that Sage 200 Selling Prices may not be updated** and/or **Suppress prompts that Sage 200 Cost Prices may not be updated** box(es) to suppress the prompt(s).

5. If you have selected the **Suppress prompts that Sage 200 Selling Prices may not be updated** option, then you will also have the option to force the price to be updated by ticking the **Override Sage 200 Selling Prices even though the User does not have Feature** option.

6. When transferring **QuoteWerks** document information into **Sage**, if an Item is not available from the **Default Warehouse**, then the transfer will fail. If you would like **ConnectIt** to transfer the Document even if the Item is not available from the **Default Warehouse** then tick **Suppress prompts that an Item is not available from the default Warehouse**.

7. When transferring **QuoteWerks** document information into **Sage**, if the Requested and/or Promised Delivery Dates are in the past, then the transfer will fail. If you would like **ConnectIt** to transfer the Document even if Requested and/or Promised Delivery Dates are in the past then tick **Suppress prompts that Delivery Dates are in the past**.

8. Click the **Save** button to retain the settings on the **Advanced | Document Transfer | Sage 200 (Sales)** tab.

Advanced Settings (Document Transfer | Sage 200 (Purchase) tab)

The **Advanced | Document Transfer | Sage 200 (Purchase)** tab provides options to suppress the warning messages that the **ConnectIt** applications generate when processing information into the **Sage 200** document.

Please note that suppressing these warning messages is not recommended and may lead to the user missing important feedback when sending information from QuoteWerks to Sage.

1. When transferring **QuoteWerks** document information into **Sage**, if the Supplier has exceeded their Credit Limit in **Sage** the transfer will fail. If you would like **ConnectIt** to transfer the Document even if the Supplier has exceeded their Credit Limit in **Sage,** then tick **Transfer Purchase Document even if the Supplier has exceeded their Limit** option. This will then enable the option to put the Purchase Document 'On Hold'; if you would like ConnectIt to place the Purchase Document 'On Hold' then tick the **Place Purchase Document 'On Hold' in Sage 200 if Supplier over Limit** option.

2. If you have selected the **Suppress prompts that Sage 200 Cost Prices may not be updated** option, then you will also have the option to force the price to be updated by ticking the **Override Sage 200 Cost Prices even though the User does not have Feature** option.

3. Click the **Save** button to retain the settings on the **Advanced | Document Transfer | Sage 200 (Purchase)** tab.

Advanced Settings (Wizards | Customer tab)

The **Advanced | Wizards | Customer** tab provides options to be included when the Customer Wizard is run.

1. When using the **ConnectIt Create Customer Wizard Create SoldTo**, **Create ShipTo** or **Create BillTo** feature by ticking the **Auto-generate Customer Account Reference when using the Create SoldTo / ShipTo / BillTo options** tickbox, then the User will not be prompted to enter an Account Reference. Instead, the ConnectIt Customer Wizard will create one.

2. When auto-generating a **Customer Account Reference**, you can set the **Prefix**, **Format** and **Seed** for the new value in the 3 Account Ref. fields.

Note: Sage 200 allows a maximum of 8 characters for the Account Reference.
Note: if you wish to have just a numeric Account Ref. then enter a Format (such as "00000000" and Seed value only.

3. When transferring **QuoteWerks** customer information into **Sage**, the **ConnectIt Create Customer Wizard** will use the default Country Code you enter in the Customer Wizard Country Code field.

4. When using the **ConnectIt Create Customer Wizard Create SoldTo**, **Create ShipTo** or **Create BillTo** feature, the Wizard may be configured to Override 'any' **Sage Customer** field with 'any' **QuoteWerks Document Header** field. For a complete list of the **Sage Customer** fields available, please refer to the **ConnectIt Software** website **Resources** page here.

Note: the Fields and Values should be entered as a pipe-separated ("|") list with the index of the relative Field corresponding to the index of the relative Value within the pipe-separated list.

5. Use the **Test Separators** button to check that you have the same number of pipe-separated values within the **Override Fields** and **Override Values** lists. By clicking the button, you will be prompted if the number of values in the Override Fields and Override Values lists match (or not).

6. Click the **Save** button to retain the settings on the **Advanced | Wizards | Customer** tab.

Advanced Settings (Wizards | Supplier tab)

The **Advanced | Wizards | Supplier** tab provides options to be included when the Supplier Wizard is run.

1. When transferring **QuoteWerks** supplier information into **Sage**, the **ConnectIt Create Supplier Wizard** will use the default Country Code you enter in the Supplier Wizard Country Code field.

2. When using the **ConnectIt Create Supplier Wizard Create All** feature, the Wizard may be configured to Override 'any' **Sage Supplier** field with 'any' **QuoteWerks Document Header**, **Document Item** or **Vendor** field. For a complete list of the **Sage Supplier** fields available, please refer to the **ConnectIt Software** website **Resources** page here.

Note: the Fields and Values should be entered as a pipe-separated ("|") list with the index of the relative Field corresponding to the index of the relative Value within the pipe-separated list.

3. Use the **Test Separators** button to check that you have the same number of pipe-separated values within the **Override Fields** and **Override Values** lists. By clicking the button, you will be prompted if the number of values in the Override Fields and Override Values lists match (or not).

4. Click the **Save** button to retain the settings on the **Advanced | Wizards | Supplier** tab.

Advanced Settings (Wizards | Product tab)

The **Advanced | Wizards | Product** tab provides options to be included when the Product Wizard is run.

1. When transferring **QuoteWerks** product information into **Sage**, you will be prompted by the **ConnectIt Create Product Wizard** if a Product Code(s) already exists in **Sage**. If you would prefer not to be prompted, then tick the box to suppress the prompt(s).

2. When transferring **QuoteWerks** product information into **Sage**, you will be prompted by the **ConnectIt Create Product Wizard** if a Product Description has non-standard characters. If you would prefer not to be prompted, then tick the box to suppress the prompt(s).

3. When transferring **QuoteWerks** product information into **Sage**, you will be prompted by the **ConnectIt Create Product Wizard** if a Product Code or Product Description is too long for Sage. If you would prefer not to be prompted, then tick the box to suppress the prompt(s).

4. If you would like to specify the **Sage Warehouse Code** and/or **Bin** where an Item is supplied from, then enter a value into the **Warehous Code** and/or **Warehouse Bin** field (respectively). Both macros (such as **&QWDI_CustomText01**) and fixed values (such as "HOME" or "Bin A") are supported. Note that these settings are used when using the **ConnectIt Create Product Wizard Create All** feature only,

5. When using the **ConnectIt Create Product Wizard Create All** feature, the Wizard may be configured to Override 'any' **Sage Stock Item** field with 'any' **QuoteWerks Document Header**, **Document Item** or **Vendor** field. For a complete list of the **Sage Stock Item** fields available, please refer to the **ConnectIt Software** website **Resources** page here.

Note: the Fields and Values should be entered as a pipe-separated ("|") list with the index of the relative Field corresponding to the index of the relative Value within the pipe-separated list.

6. Use the **Test Separators** button to check that you have the same number of pipe-separated values within the **Override Fields** and **Override Values** lists. By clicking the button, you will be prompted if the number of values in the Override Fields and Override Values lists match (or not).

7. The **Tax Code (Y/N)** values are the codes which will be used when creating the **Sage Stock Item** depending on whether the Product in **QuoteWerks** is marked as Taxable = "Y" or Taxable = "N".

8. Click the **Save** button to retain the settings on the **Advanced | Wizards | Product** tab.

Advanced Settings (Tools tab)

The **Advanced | Tools** tab provides utilities to correct issues when attempting to transfer Document to Sage.
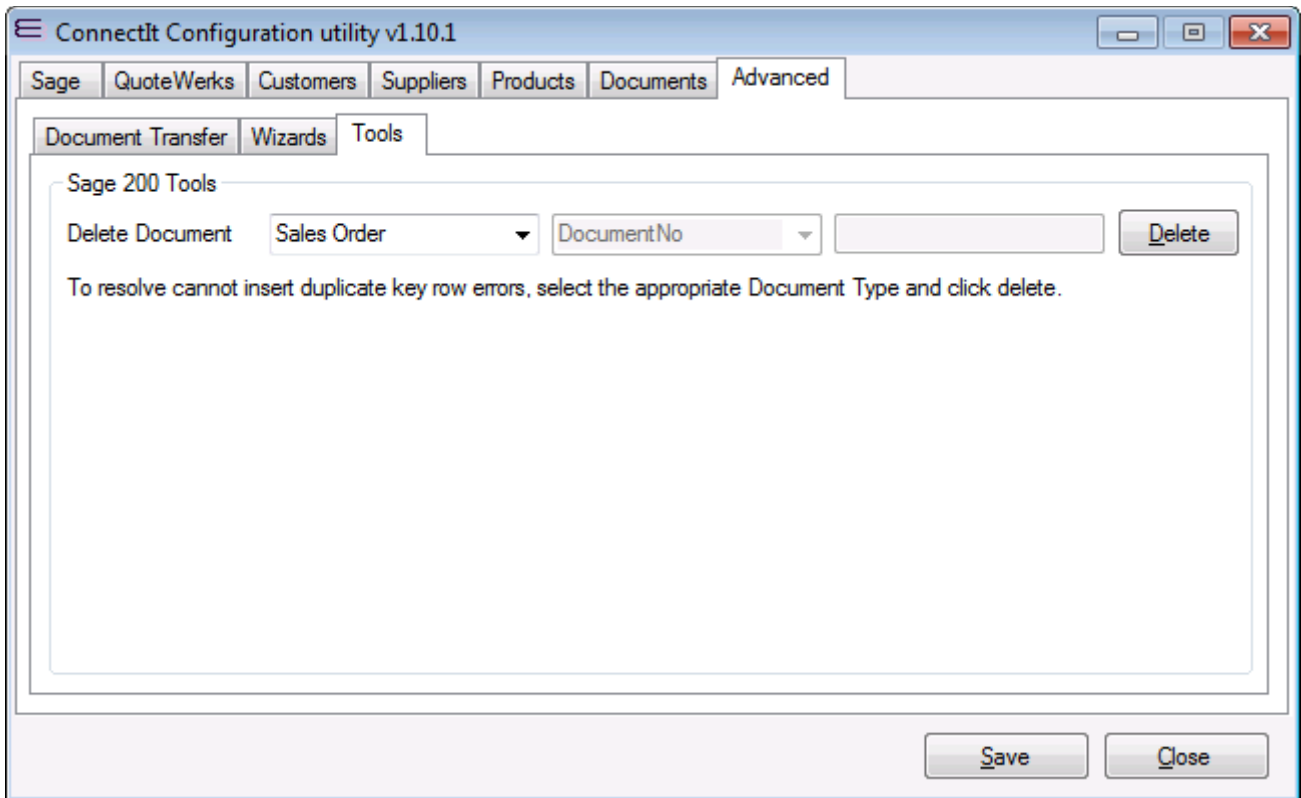
The **Delete Document** features may be used to correct the issue **cannot insert duplicate key row in object**. The details of how and why this error may occur are in Knowledgebase Article 312 here. Select the Document Type (**Sales Order** for **SOPOrder** errors, **Purchase Order** for **POPOrder** errors) and then click **Delete**. You will be prompted 'Are you sure?', click Yes and the Document and associated records will be removed from the Sage database.

Note: While not recommended, this utility may be used to delete any Sales Order or Purchase Order Document from the Sage database. By double-clicking the 'Delete Document' label, this will enable the Field dropdown and Value textbox. Values may be set in these controls to delete 'any' Document.