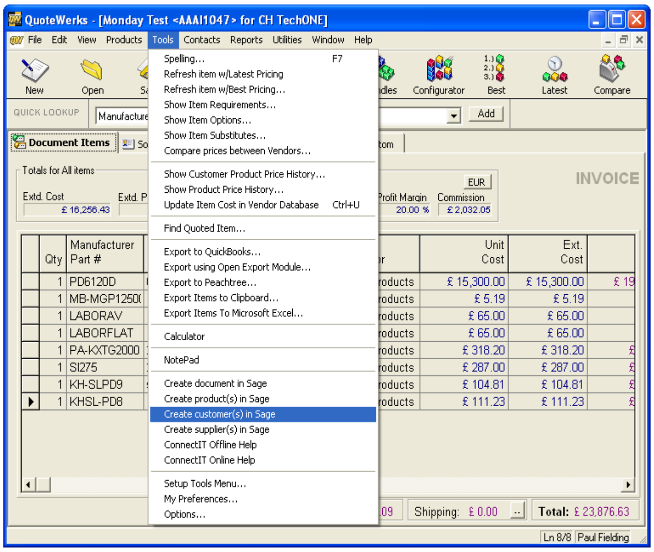
Step-by-Step Guide to the ConnectIt Create Customer Wizard

The **ConnectIt Create Customer Wizard** utility provides a way to create customers in **Sage 200**. 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-Sage200** 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**.



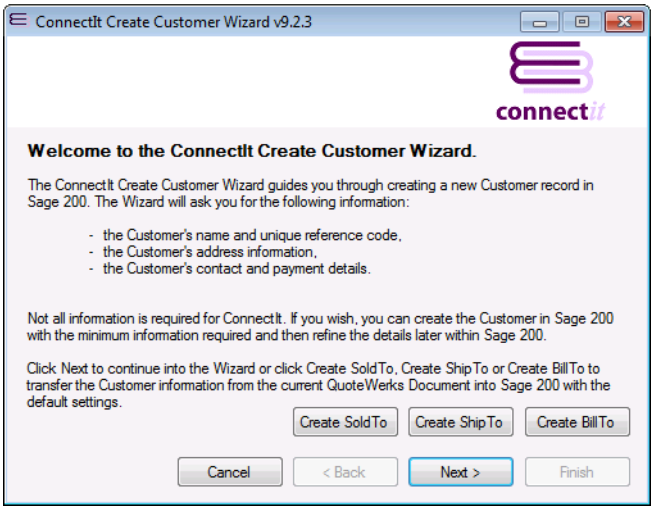
2. Welcome…

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):

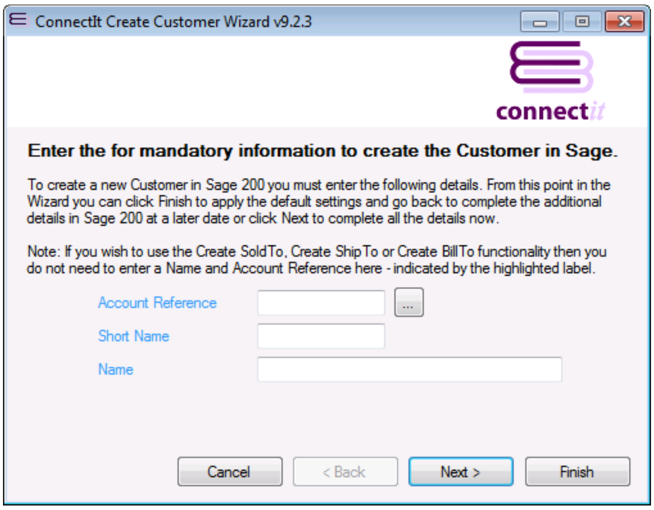
- the customer's name and unique reference code
- the customer's account preferences
- the customer's credit and bank details

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…



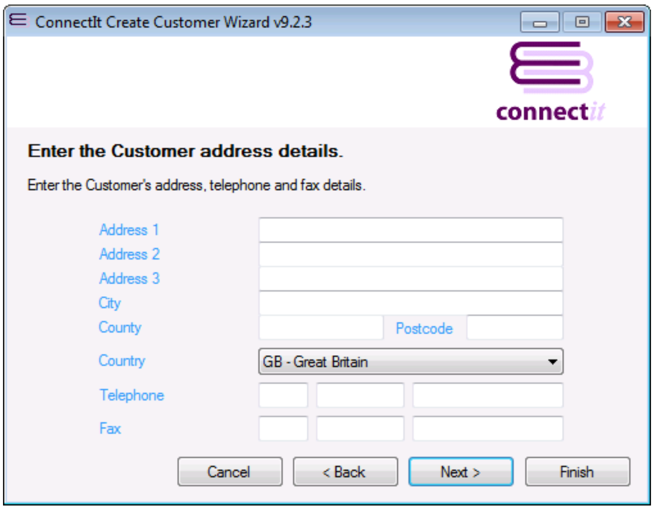
The following information is mandatory and must be entered before the **ConnectIt Create Customer Wizard** can create a customer(s) in **Sage**

- Account Reference
- Short Name
- Name

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. Or you can click **Finish** to create the customer in **Sage**.

If you would like the **ConnectIt Create Customer Wizard** to auto-generate an **Sage 200 Account Reference** based on the Configuration Prefix, Format and Seed settings, then click the ellipses ("…") button.

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**.

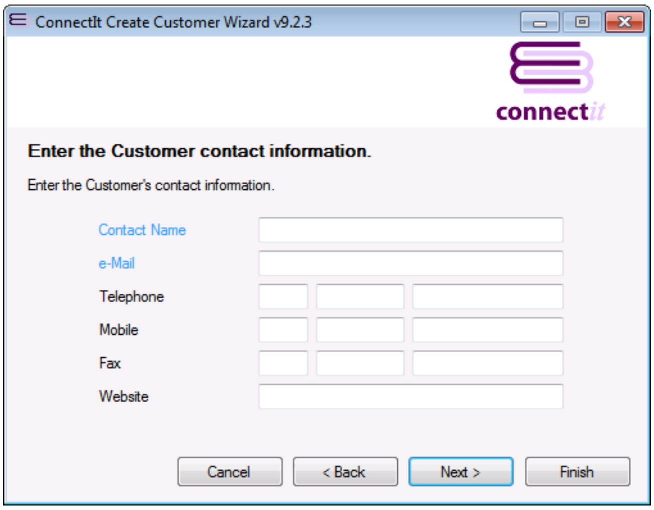
5. Customer Contact Information…

On the **customer contact information** screen, information can be entered or selected for:

- Contact Name
- e-Mail
- Telephone
- Mobile
- Fax
- Website

This information is not mandatory.

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



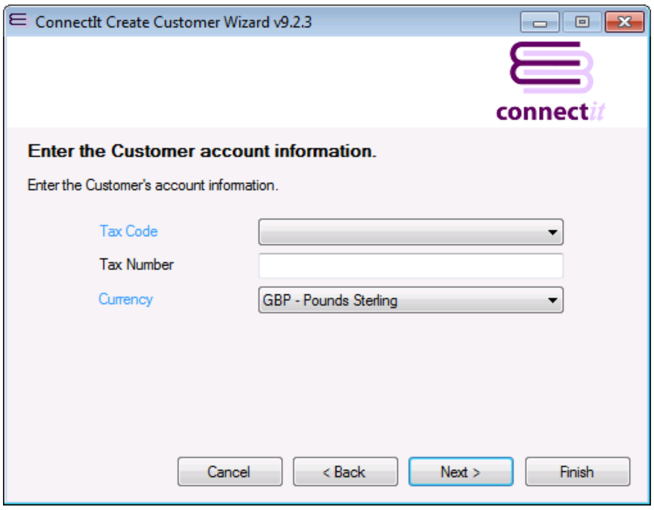
6. Customer Account Information…

On the **customer account information** screen, information can be entered or selected for:

- Tax Code
- Tax Number
- Currency

This information is not mandatory.

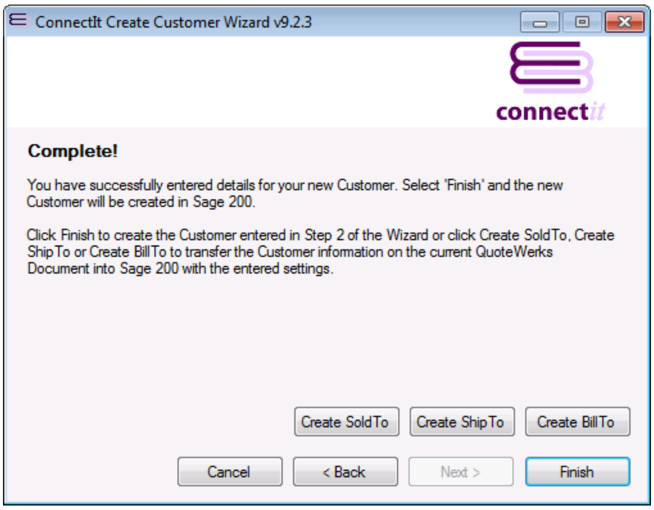
Either click **Next** to continue entering information for the customer or click **Finish** to create the customer in **Sage**.



7. 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**.



8. 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.**