

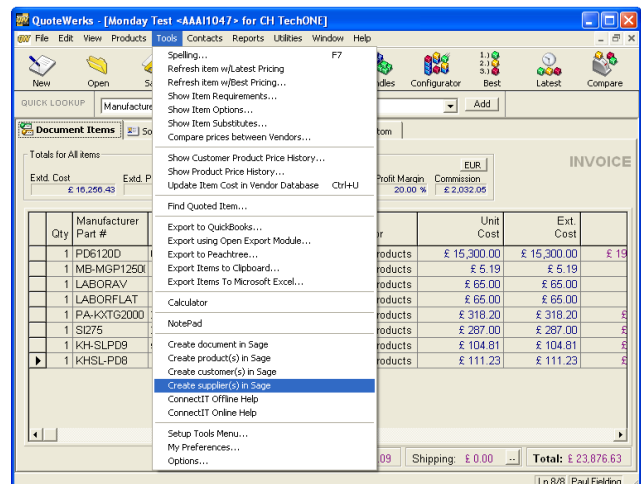
# Step-by-Step Guide to the ConnectIt Create Supplier Wizard

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

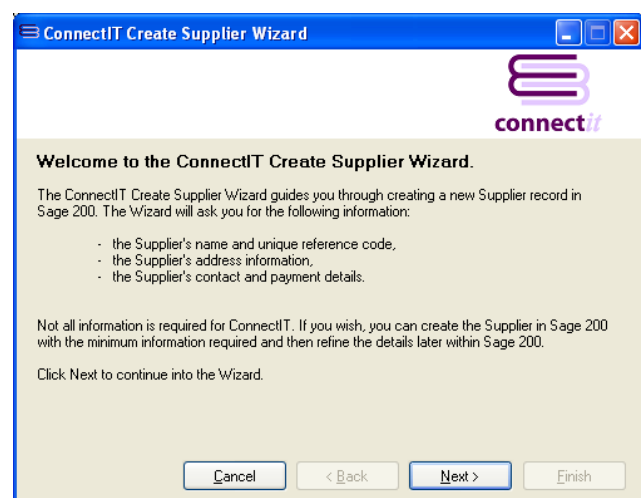
The **ConnectIt Create Supplier Wizard** guides you through creating a new supplier(s) in **Sage**.

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 payment 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.



### 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

- Account Reference
- Short Name
- Name

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.

The screenshot shows the 'ConnectIT Create Supplier Wizard' window. The title bar reads 'ConnectIT Create Supplier Wizard'. The ConnectIT logo is in the top right. The main heading is 'Enter the for mandatory information to create the Supplier in Sage.' Below this, a paragraph states: 'To create a new Supplier in Sage 200 you must enter the following details. From this point in the Wizard you can click Finish to apply the default settings and go back to complete the additional details in Sage 200 at a later date or click Next to complete all the details now.' There are three input fields: 'Account Reference', 'Short Name', and 'Name'. At the bottom, there are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'.

### 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.

The screenshot shows the 'ConnectIT Create Supplier Wizard' window. The title bar reads 'ConnectIT Create Supplier Wizard'. The ConnectIT logo is in the top right. The main heading is 'Enter the Supplier address details.' Below this, a paragraph states: 'Enter the Supplier's address, telephone and fax details.' There are several input fields: 'Address 1', 'Address 2', 'Address 3', 'City', 'Country' (with a dropdown menu showing 'GB - Great Britain'), 'Postcode', 'Telephone' (with three separate fields), and 'Fax' (with two separate fields). At the bottom, there are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'.

### 5. Supplier Contact Information...

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

- Contact Name
- E-Mail
- Telephone numbers
- Website

This information is not mandatory.

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

The screenshot shows the 'ConnectIT Create Supplier Wizard' window. The title bar reads 'ConnectIT Create Supplier Wizard'. The ConnectIT logo is in the top right. The main heading is 'Enter the Supplier contact information.' Below this, a paragraph states: 'Enter the Supplier's contact information.' There are several input fields: 'Contact Name', 'e-Mail', 'Telephone' (with three separate fields), 'Mobile' (with three separate fields), 'Fax' (with two separate fields), and 'Website'. At the bottom, there are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'.

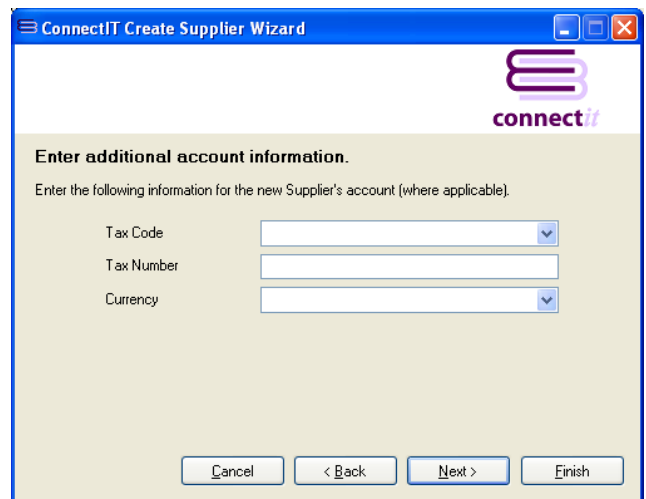
## 6. Enter Additional Account Information...

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

- Tax Code
- Tax Number
- Currency

This information is not mandatory.

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

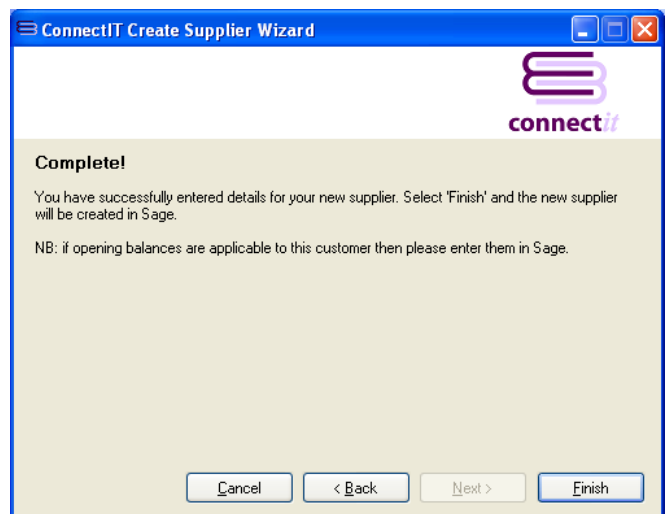


The screenshot shows a window titled "ConnectIT Create Supplier Wizard" with the ConnectIT logo in the top right. The main heading is "Enter additional account information." Below this, it says "Enter the following information for the new Supplier's account (where applicable)." There are three input fields: "Tax Code" (a dropdown menu), "Tax Number" (a text box), and "Currency" (a dropdown menu). At the bottom, there are four buttons: "Cancel", "< Back", "Next >", and "Finish".

## 7. 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**.



The screenshot shows a window titled "ConnectIT Create Supplier Wizard" with the ConnectIT logo in the top right. The main heading is "Complete!". Below this, it says "You have successfully entered details for your new supplier. Select 'Finish' and the new supplier will be created in Sage." There is a note: "NB: if opening balances are applicable to this customer then please enter them in Sage." At the bottom, there are four buttons: "Cancel", "< Back", "Next >", and "Finish".

## 8. 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**.



The screenshot shows a dialog box titled "ConnectIT Create Supplier Wizard" with a question mark icon on the left. The text says "The new Supplier was successfully created in Sage." Below this, it asks "Would you like to use these details and create another Supplier in Sage?". There are two buttons: "Yes" and "No".