

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

The ConnectIt Create Product Wizard utility provides a way to create products in Sage MAS. To start the ConnectIt Create Product Wizard application, you can use the Create product(s) in MAS option from the QuoteWerks | Tools menu or browse to the Start | All Programs | ConnectIt menu and click the ConnectIt Create Product Wizard option.

#### 1. Starting...

Click the **Create product(s) in MAS** option from the **QuoteWerks** | **Tools** menu.

This starts the Connectlt Create Product Wizard.

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#### 2. Welcome...

The **ConnectIt Create Product Wizard** guides you through creating a new product(s) in **Sage MAS**.

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

- product description and unique reference code
- product information
- sales and purchase details

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

Click Next to continue by manually creating a





single product, or click **Create All** to create all the products in **Sage MAS** that are highlighted in the **QuoteWerks** document.

#### 3. Mandatory Information...

The following information is mandatory and must be entered before the **Connectlt Create Product Wizard** can create a product(s) in **Sage MAS**.

- Description
- Code

Once the above information has been entered, you can either click **Next** to continue adding product information into the following **Connectlt Create Product Wizard** screens.

Alternatively, you can click **Finish** to create the product in **Sage MAS**.

# 4. Product Details...

On the **product details screen**, information can be entered for:

- Product Line & Type
- Valuation
- Procurement
- Unit of Measure
- Weight & Volume
- Inventory Cycle

This information is not mandatory.

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

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	connectit
Enter the for mandatory in	formation to create the product in Sage.
Wizard you can click Finish to apply t	S you must enter the following details. From this point in the he default settings and go back to complete the additional click Next to complete all the details now.
Note: If you wish to use the Create Al and Code here.	I functionality then you do not need to enter a Description
Description	
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😑 ConnectIT Create Pro	duct Wizard		
			connect <i>it</i>
Enter the product de	etails.		
Enter details about the produ (where applicable).	ict's Line, Type, Ware	house, Valuation, Inve	ntory Cycle and Pricing
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Product Type	Finished Good 🛛 🗸	Purchase U/M	CAN - CAN 🔽
Valuation	Standard 🗸 🗸 🗸	Sales U/M	CASE - CASE 🔽
Procurement Type	*	Weight	
		Volume	0
		Inventory Cycle	
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#### 5. More Product Details...

On the **product details screen**, information can either be entered or selected for:

- Pricing
- Warehouse
- Warranty Code
- Stocking
- Tax Classes

This information is not mandatory.

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

Note: Price Code and Primary Vendor selection is not available at this time.

# 6. **Product Options...**

On the **product options details** screen, information can either be entered or selected for:

- Returns
- Back Orders
- Trade Discount
- Allocate Landed Costs

This information is not mandatory.

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

# 7. Complete!

The **Connectlt Create Product Wizard** tells you that you have now entered all the information for your new product.

Click Finish to close the Connectlt Create Product Wizard and create the product in Sage MAS, or click Create All to create all the products in Sage MAS that are highlighted in the QuoteWerks document.



⇒ ConnectIT Create Product Wizard	
	connectit
Select the required product options.	
Select the appropriate options (where applicable).	
Allow Returns	
Allow Back Orders	
Allow Trade Discount	
Allocate Landed Cost	
Cancel < Back Next >	> <u>F</u> inish

🖴 ConnectIT Create Product Wizard	
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	connectit
Complete!	
You have successfully entered details for your new product. Select 'Finish will be created in Sage MAS.	h' and the new product
Click Finish to create the product entered in Step 2 of the Wizard or click the selected Products on the current QuoteWerks document into Sage M settings.	
	Create <u>A</u> ll
Cancel < Back	t> <u>F</u> inish



# 8. Additional Products

Once you have finished entering information for your new product, the **Connectlt Create Product Wizard** gives you the option to use the details you have just entered to create another product in **Sage MAS**.

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



Connect	IT Create Product Wizard	$\times$				
?	The new products were successfully created in Sage MAS: 50 line items on the document. 15 line items selected. 15 Products created.					
	Would you like to use these details to create more products in Sage $\ensuremath{M4}$	4S?				
	Yes <u>N</u> o					

