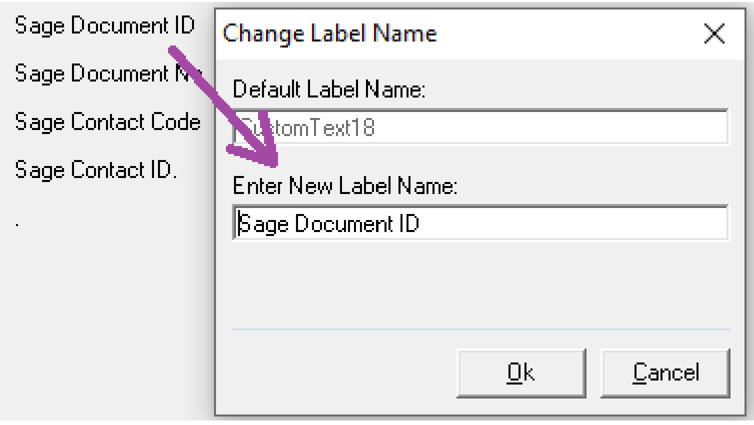
Step-by-Step Guide to Configuration

The **ConnectIt Configuration** utility provides a way to check or change the various settings the **ConnectIt-SageOne** software uses when running the various QuoteWerks and Sage One Business Cloud integration utilities.

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

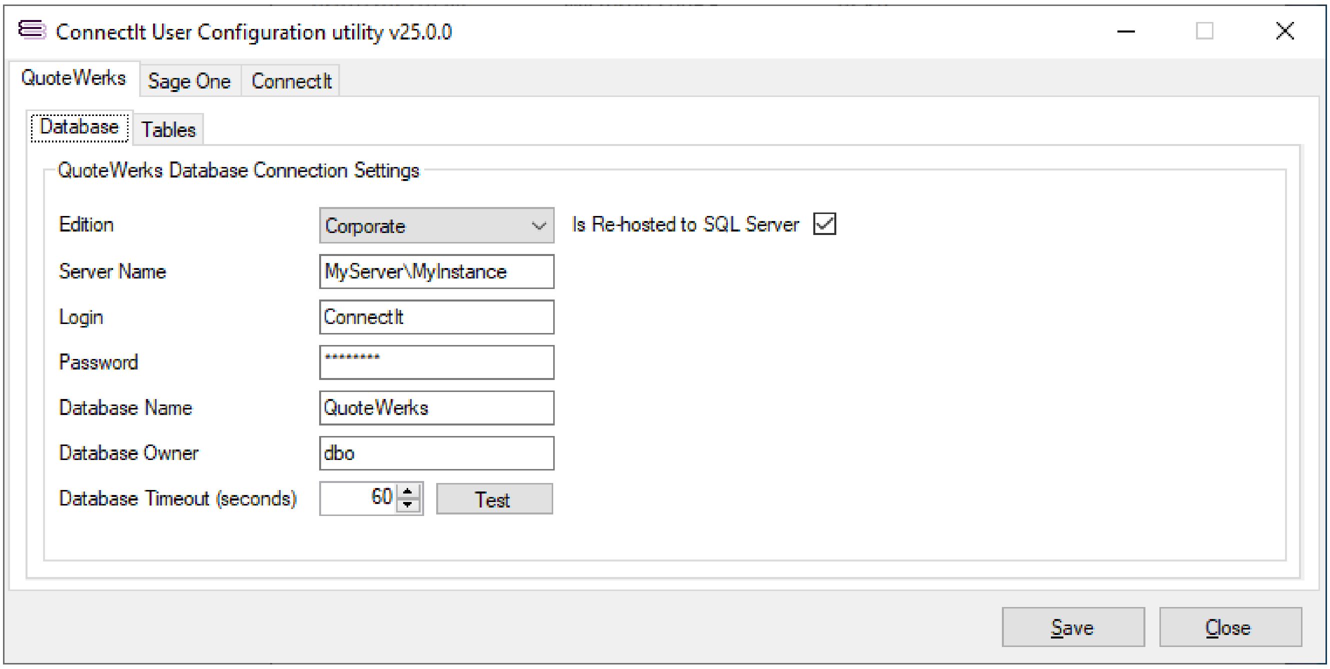
NOTE: The field names entered in the various settings in the ConnectIt Configuration utility are based on the QuoteWerks database field names and not the customised field captions. To find the QuoteWerks database field name label, (the default label name), go into QuoteWerks, then while holding down the Ctrl key double left click on the field label in question.



Sage Developer QuoteWerks Developer Partner

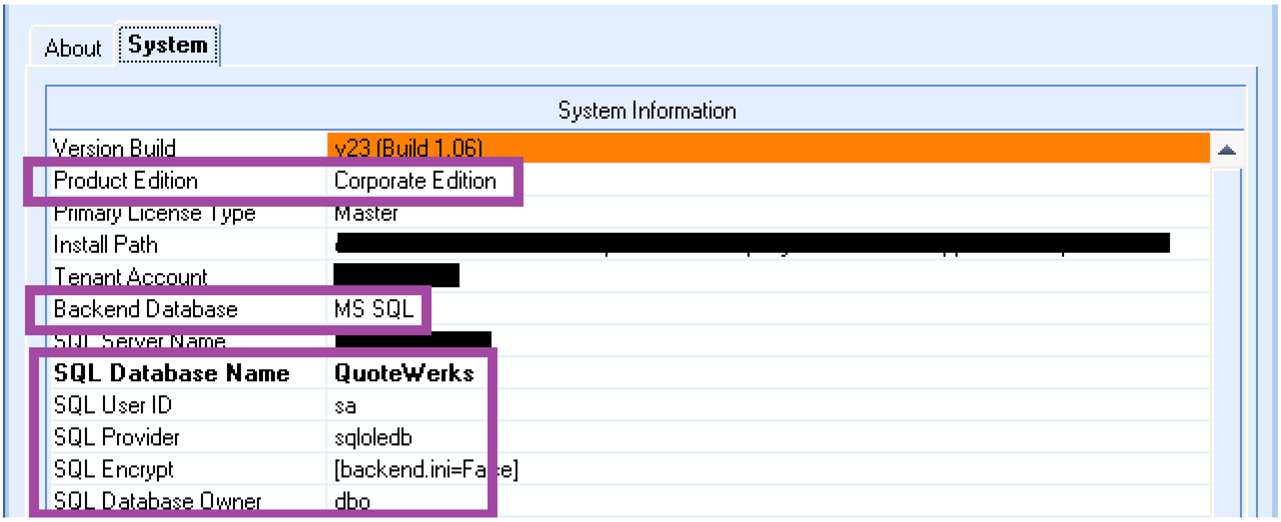
QuoteWerks Database Connection Settings

The **QuoteWerks tab -> Database tab** enables the connection to the QuoteWerks database to be set up and tested.



1. On the **QuoteWerks tab -> Database tab**, select the **Edition** of QuoteWerks that you are running (Standard, Professional or Corporate).
2. If running the QuoteWerks Corporate edition, the **Is Re-hosted to SQL Server** 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 QuoteWerks Help -> About screen -> System tab.

NOTE: The password value is not displayed for security reasons. You may need to ask your IT systems administrator, or the person who originally re-hosted QuoteWerks, for this information.

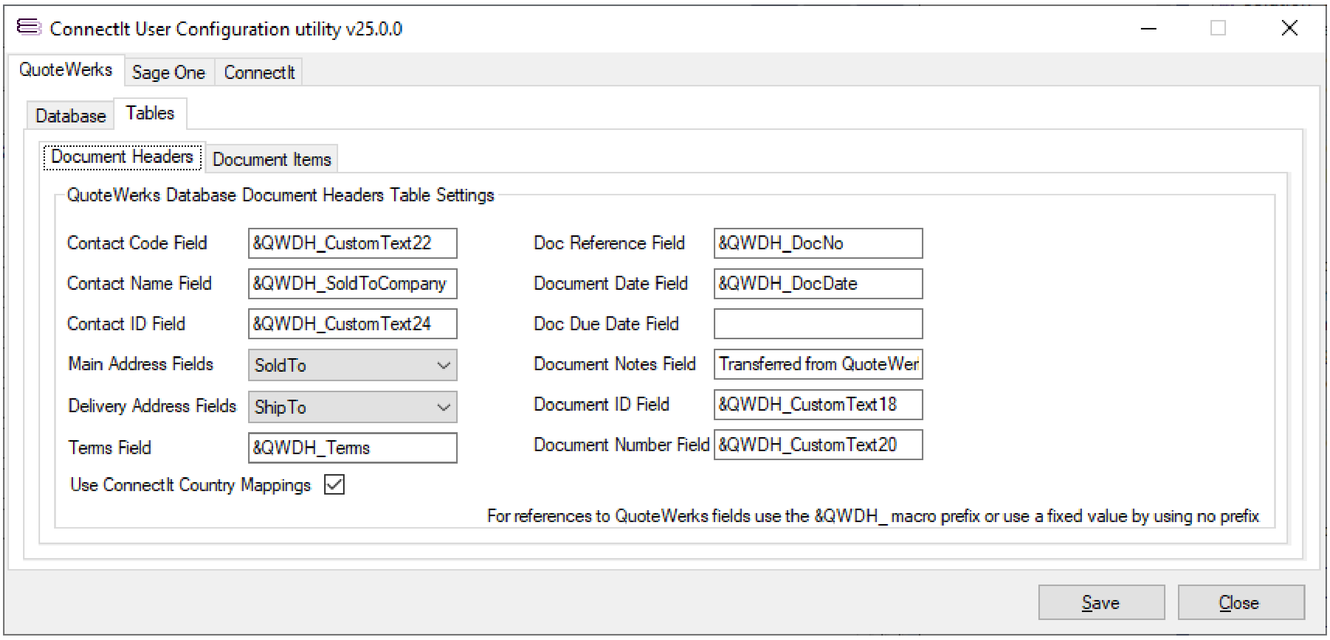


4. Click the **Test** button to check that the settings are correct.

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.

QuoteWerks Database Document Headers Table Settings

The **QuoteWerks tab -> Tables tab -> Document Headers tab** provides options to configure which fields contain the key information that will be used when the QuoteWerks and Sage One integration utilities are run.



1. **Contact Code Field** is the name of the field where the Sage One Contact Code is read from. If the Sage One Contact Code is not available in QuoteWerks, then this can be blank or a default fixed value may be applied. When it is used, we recommend that it is a field value pulled through from the contact management software you have linked to QuoteWerks to ensure that it is entered correctly and consistently.
2. **Contact Name Field** is the name of the field where the Sage One Contact Name is read from. This option is useful if you do not have the Sage One Contact Code available in your contact manager or QuoteWerks and so need to look up the Contact Code from the Contact Name.
3. **Contact ID Field** is the name of the field where the Sage One Contact ID will be written when it is looked up or created.

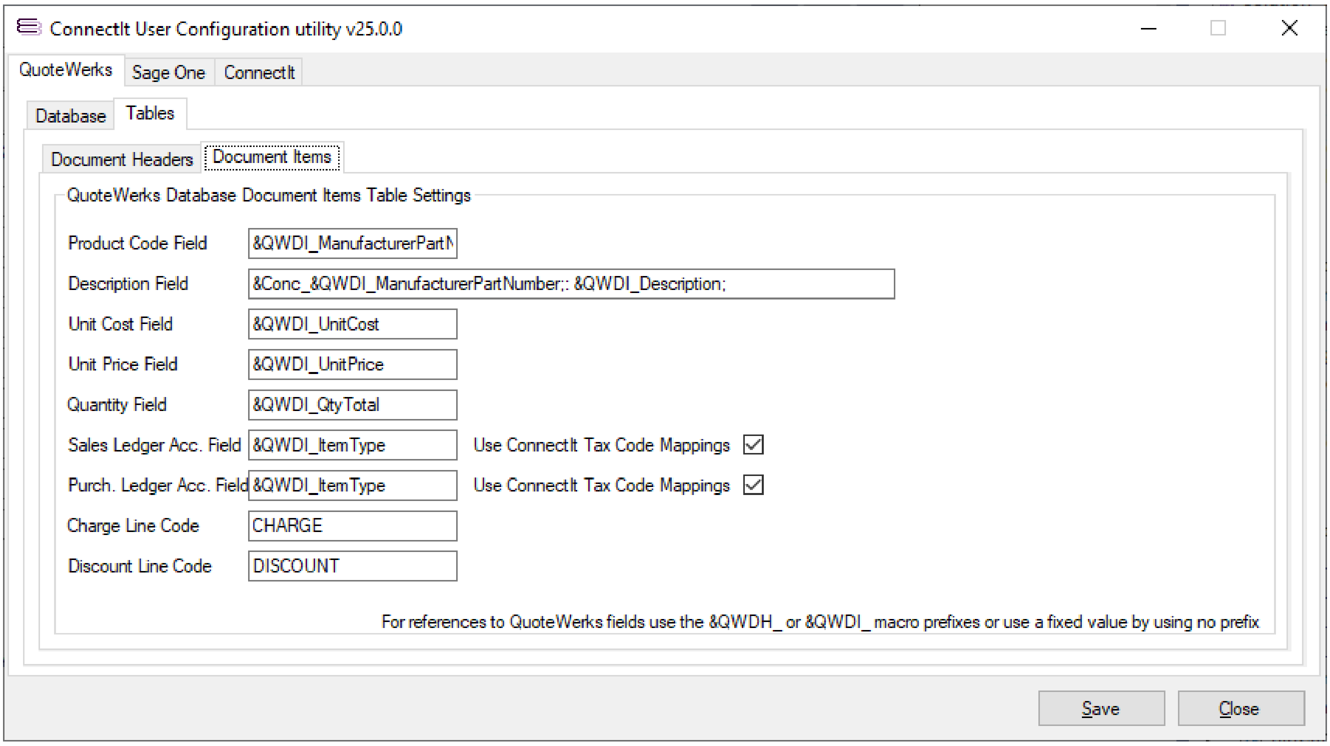
NOTE: the ConnectIt-SageOne 'create document' processes require a Contact ID to be sent as part of the request. If a Contact ID is not sent, then the Sage One API will return an error.

4. **Main & Delivery Address Fields** are the set of fields (SoldTo, ShipTo or BillTo) where the Contact address will be read from when creating a Contact in Sage One.
5. **Terms Field** is the name of the field where the Contact Terms and Conditions will be read from when creating a Contact in Sage One.
6. **Use ConnectIt Country Mapping** options are if you would like the field values read from the Address fields to be used to match with the ConnectIt QuoteWerks and Sage One Country Code mappings. (See ConnectIt Country Code Mappings section below.)
7. **Doc Reference, Document Date, Doc Due Date** and **Notes Fields** are the names of the fields or fixed values that are used when creating the QuoteWerks Document as a document in Sage One.
8. **Document ID** and **Document Number Fields** are the names of the fields where the Sage One document details are written to once it has been created.

NOTE: all settings (apart from the Main and Delivery Address Fields selection) support the use of ConnectIt &QWDH_ macro prefixes. If using a &QWDH_ macro prefix, then the integration utility will read the value from the field in the suffix part of the setting. For example: in the above configuration settings, we're using the &QWDH_CustomText22 macro to tell ConnectIt to read the Contact Code Field from the QuoteWerks document Custom tab CustomText22 field.

QuoteWerks Database Document Items Table Settings

The **QuoteWerks tab -> Tables tab -> Document Items tab** provides options to configure which fields contain the key information that will be used when the QuoteWerks and Sage One integration utilities are run.



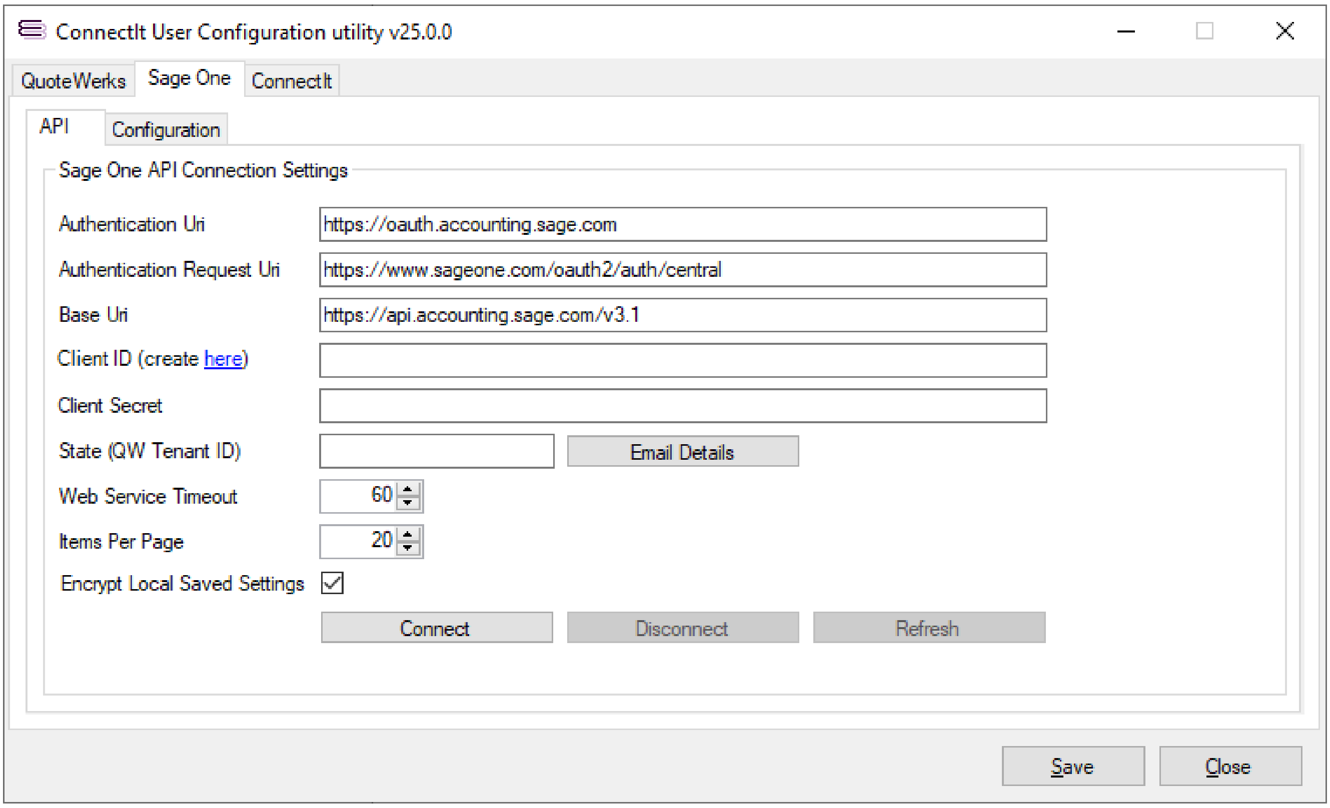
1. **Product Code Field** is the name of the field where the QuoteWerks Document line item Product Code is read from when checking Products exist or creating a document in Sage One. If you do not have Codes for the items that you sell, then this can be blank or a default fixed value may be applied.
2. **Description Field** is the name of the field where the QuoteWerks Document line item description is read from when creating a document in Sage One.
3. **Unit Cost, Unit Price** and **Quantity Fields** are the names of the fields where the QuoteWerks Document line item buying price, selling price and quantity are read from when creating a document in Sage One.
4. **Sales** and **Purchase Ledger Acc. Fields** are the names of the fields where the QuoteWerks Document line item Sage One Tax (aka Nominal) Code is read from when creating a document in Sage One. If you do not have or do not know the Sage One Tax Codes for the items that you sell, then this can be blank or a default fixed value may be applied.
5. **Use ConnectIt Tax Code Mapping** options are if you would like the field values read from the Ledger Acc. Fields to be used to match with the ConnectIt QuoteWerks and Sage One Tax Code mappings. (See ConnectIt Tax Code Mappings section below.)
6. **Charge Line Code** is the Product Code to use when creating a document in Sage One for Charge Line Types on the QuoteWerks document.
7. **Discount Line Code** is the Product Code to use when creating a document in Sage One for Discount Line Types on the QuoteWerks document.

NOTE: all settings support the use of ConnectIt &QWDH_ and &QWDI_ macro prefixes. If using a &QWDH_ or &QWDI_ macro prefix, then the integration utility will read the value from the field in the suffix part of the setting. For example: in the above configuration settings, we're using the &QWDI_ManufacturerPartNumber macro to tell ConnectIt to read the Product Code from the QuoteWerks document Document Items tab ManufacturerPartNumber field.

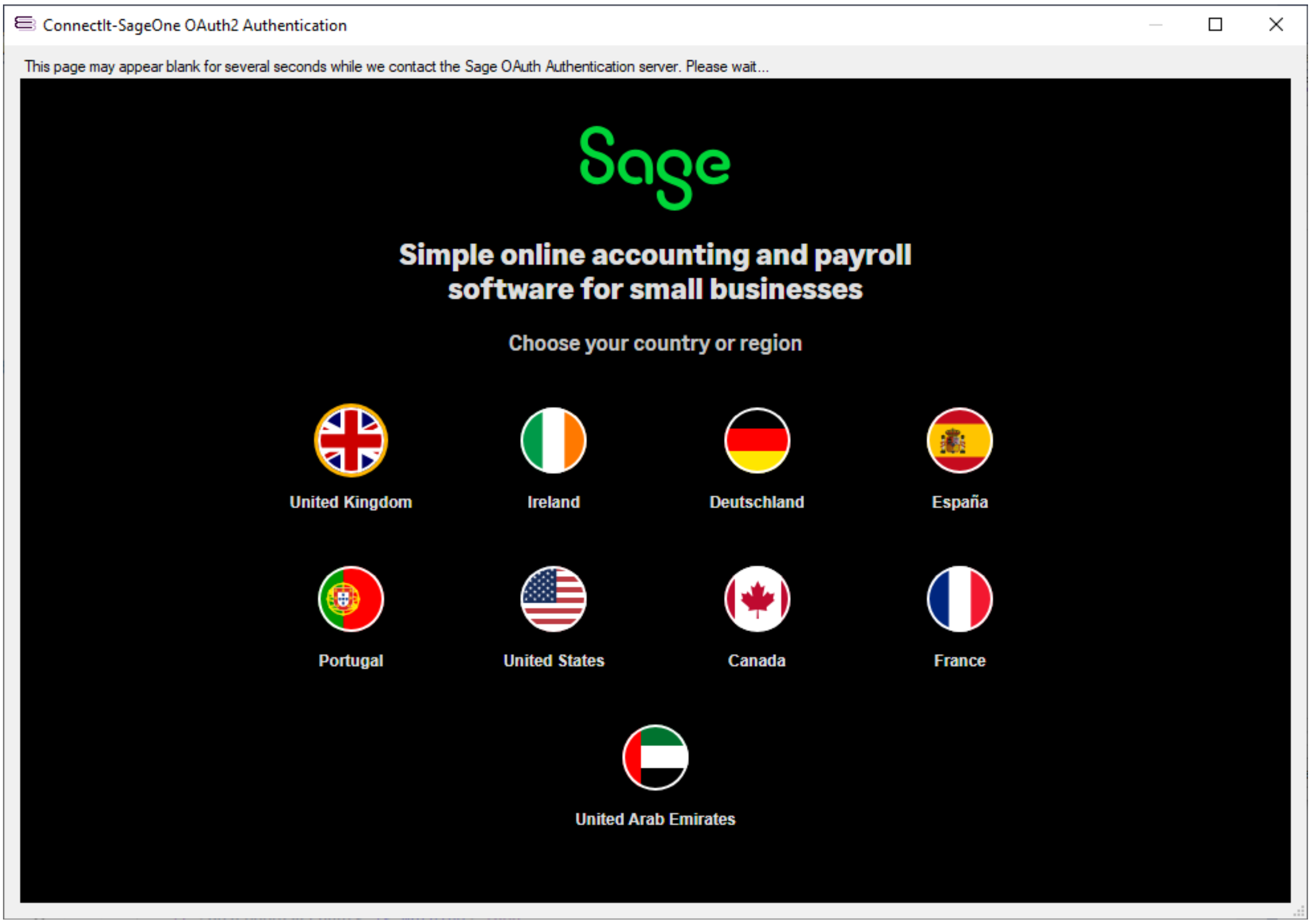
The Description field also supports the &Conc_ macro to concatenate multiple field values.

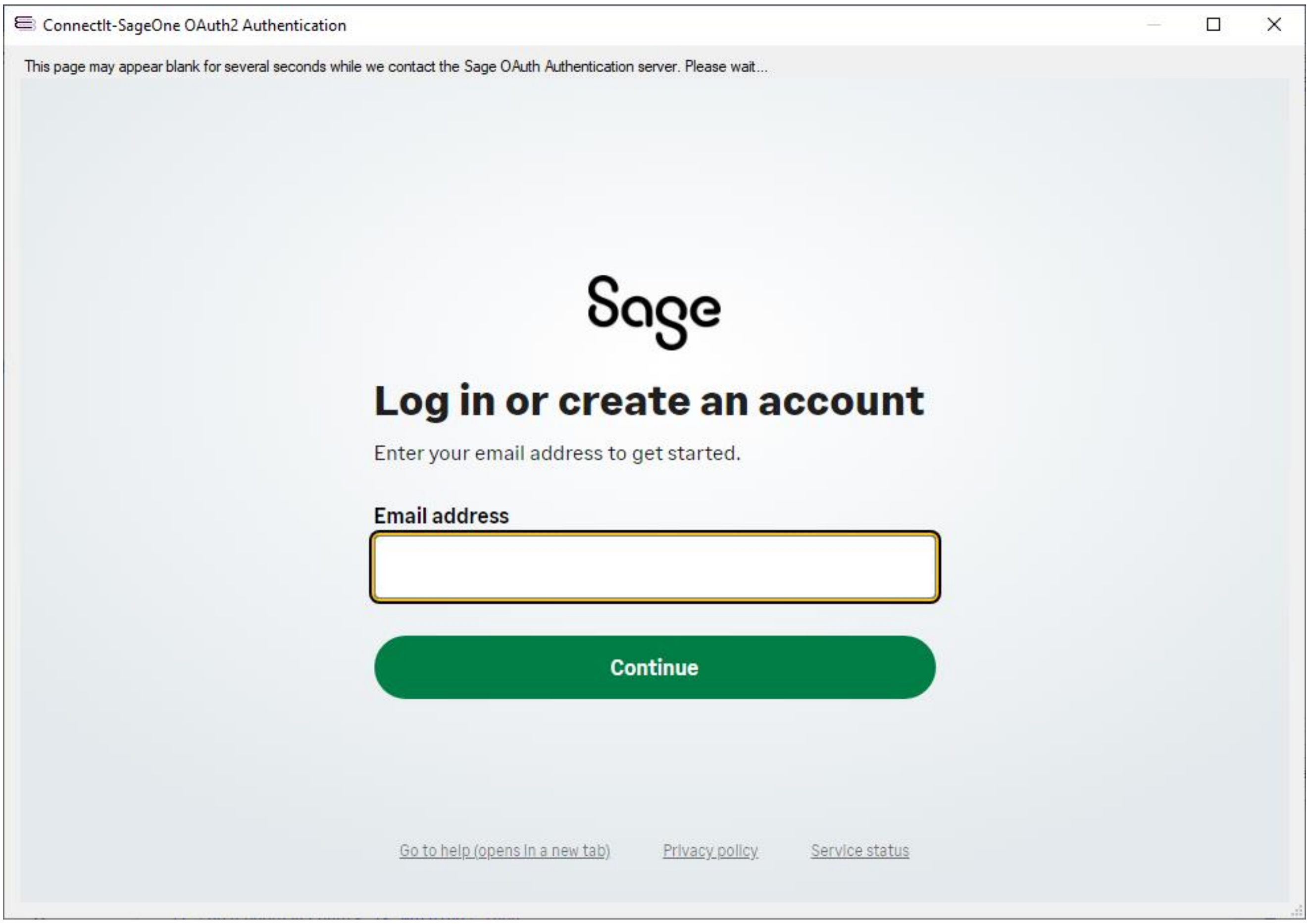
Sage One API Connection Settings

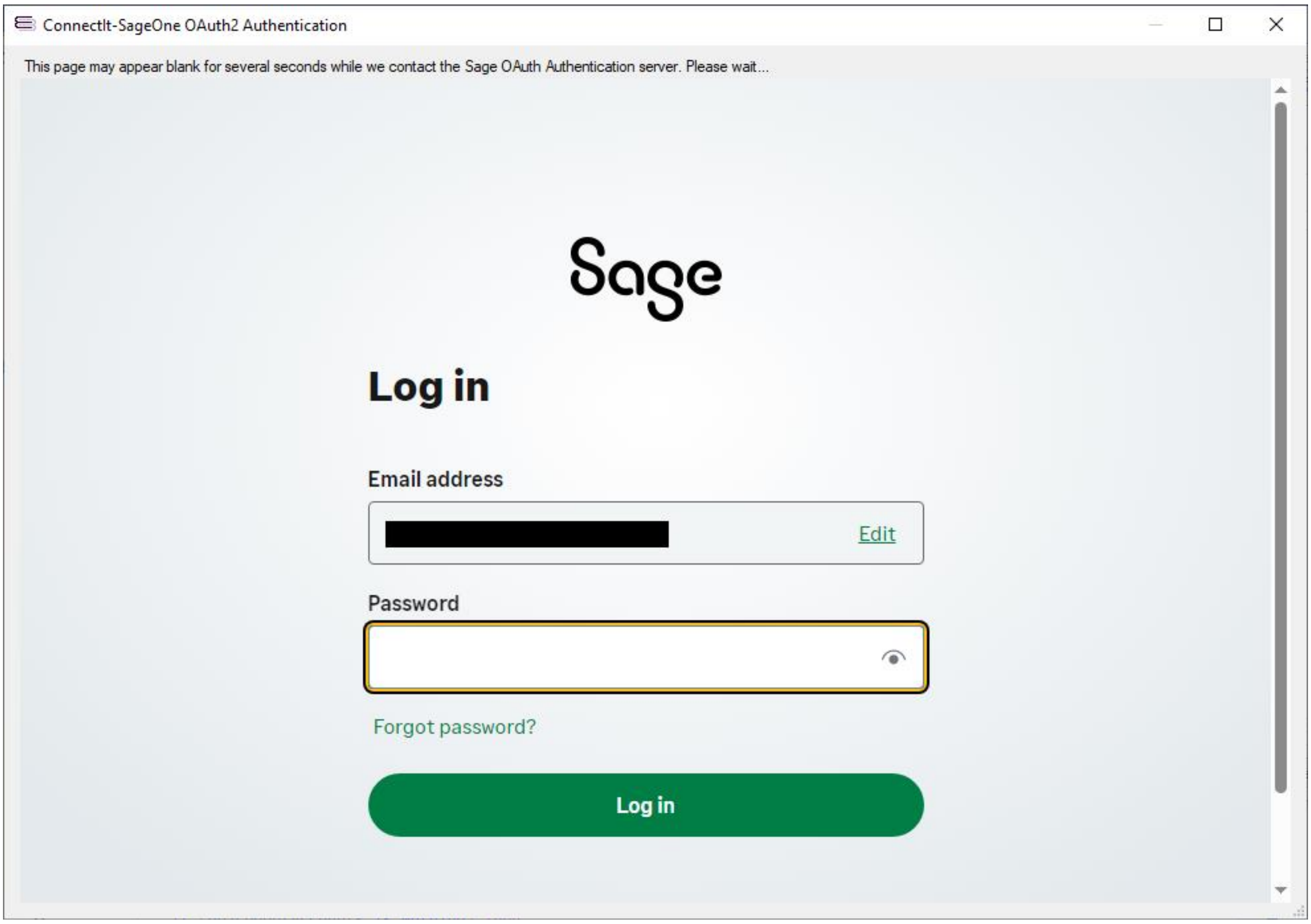
The **Sage One tab -> API tab** enables the connection to your Sage One Business Cloud account to be set up and tested.

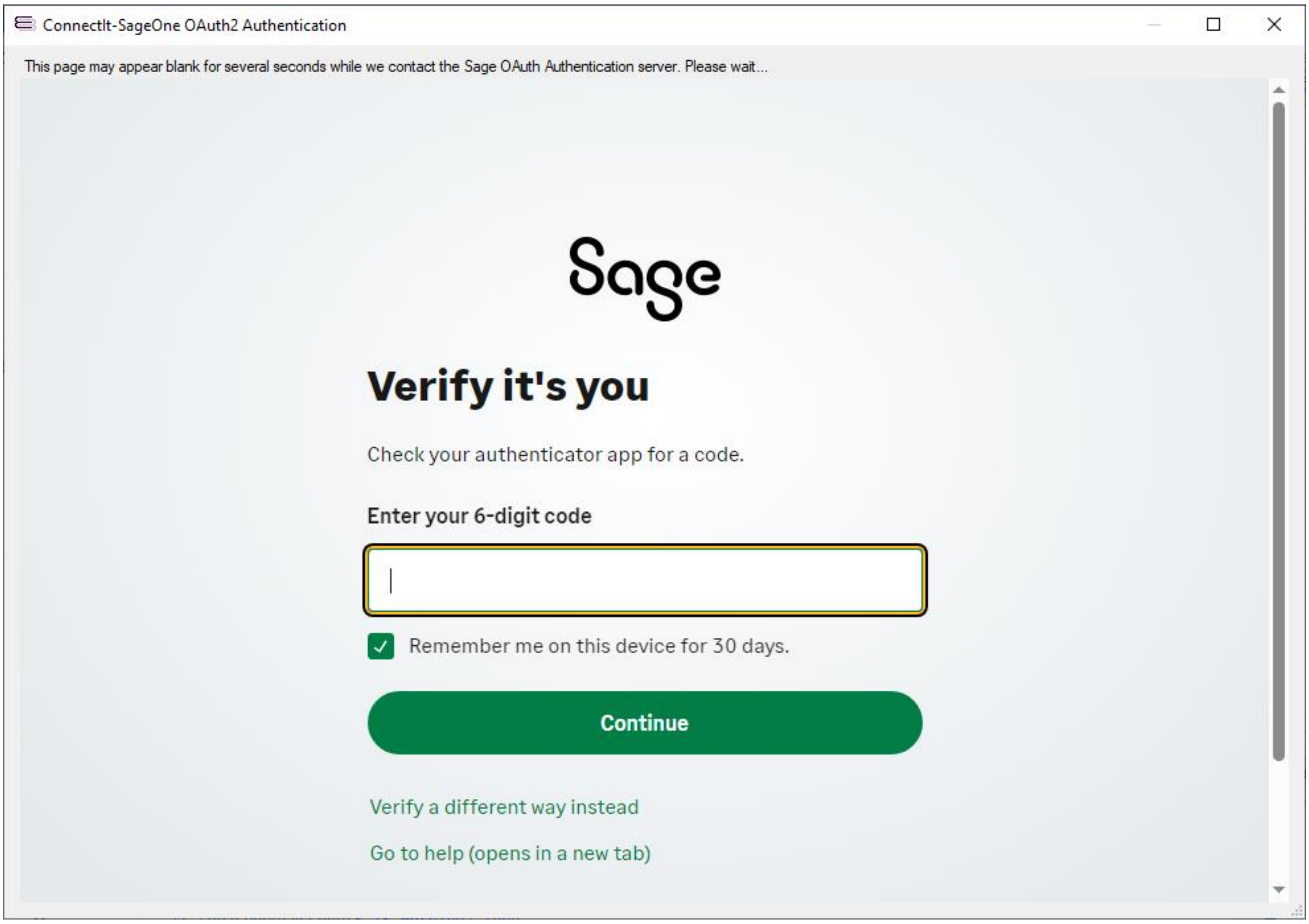


1. **Authentication Uri, Authentication Request Uri** and **Base Uri** options are available, but these should only be modified if you are advised to do so by ConnectIt-SageOne support.
2. Instructions on how to create a Sage One Business Cloud App in order to generate a Client ID and Client Secret, which will then allow ConnectIt-SageOne to 'talk' to your Sage One Business Cloud account, can be found on our YouTube channel in the ConnectIt-SageOne playlist **here**.
3. **State (QW Tenant ID)** is your QuoteWerks unique Tenant ID, which can be found on your QuoteWerks Tools menu -> License Manager screen.
4. Click the **Email Details** button to send us the Client ID, Client Secret and QuoteWerks Tenant ID so that we can configure our authentication server to accept your details.
5. **Web Service Timeout** (default 60 seconds) may be changed if you are experiencing timeout errors due to a slow local network (perhaps using wi-fi) or internet connection.
6. **Items Per Page** (default 20) may be modified to try to optimise the speed at which information is returned from the Sage One Business Cloud API. We have no evidence at this time what an optimal Items Per Page setting might be; the setting is available here for future use if required.
7. **Encrypt Local Saved Settings** (default ticked) sets whether the Sage One Business Cloud “Token” details are encrypted. This may be useful if you are experiencing issues with Sage One API connectivity and investigating issues around this.
8. Click the **Connect** button to test that the settings work as expected. You will be presented with a series of screens (screenshots below) to log into Sage One Business Cloud and authorise the App created in step #2 above to access your Sage One Business Cloud account.


ConnectIt-SageOne OAuth2 Authentication
This page may appear blank for several seconds while we contact the Sage OAuth Authentication server. Please wait...
Sage
Simple online accounting and payroll software for small businesses
Choose your country or region
United Kingdom
Ireland
Deutschland
España
Portugal
United States
Canada
France
United Arab Emirates

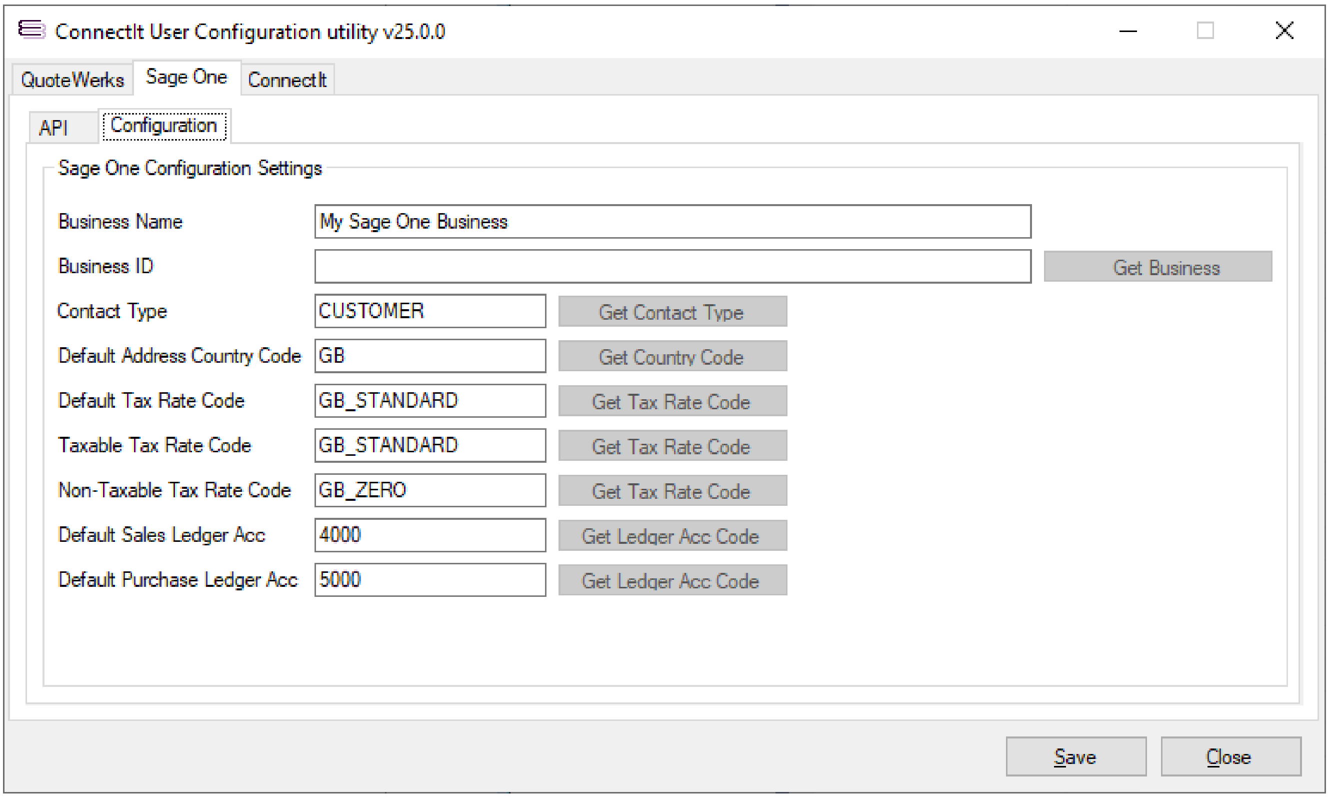

ConnectIt-SageOne OAuth2 Authentication
This page may appear blank for several seconds while we contact the Sage OAuth Authentication server. Please wait...
Sage
Log in or create an account
Enter your email address to get started.
Email address
Continue
Go to help (opens in a new tab)
Privacy policy
Service status


ConnectIt-SageOne OAuth2 Authentication
This page may appear blank for several seconds while we contact the Sage OAuth Authentication server. Please wait...
Sage
Log in
Email address
[redacted]
Edit
Password
Forgot password?
Log in


ConnectIt-SageOne OAuth2 Authentication
This page may appear blank for several seconds while we contact the Sage OAuth Authentication server. Please wait...
Sage
Verify it's you
Check your authenticator app for a code.
Enter your 6-digit code
Remember me on this device for 30 days.
Continue
Verify a different way instead
Go to help (opens in a new tab)

Sage One Configuration Settings

The **Sage One tab -> Configuration tab** provides options to configure some of the settings that will be used when the QuoteWerks and Sage One Business Cloud integration utilities are run. The buttons become available once you have successfully connected to the Sage One Business Cloud API on the Sage One API tab.

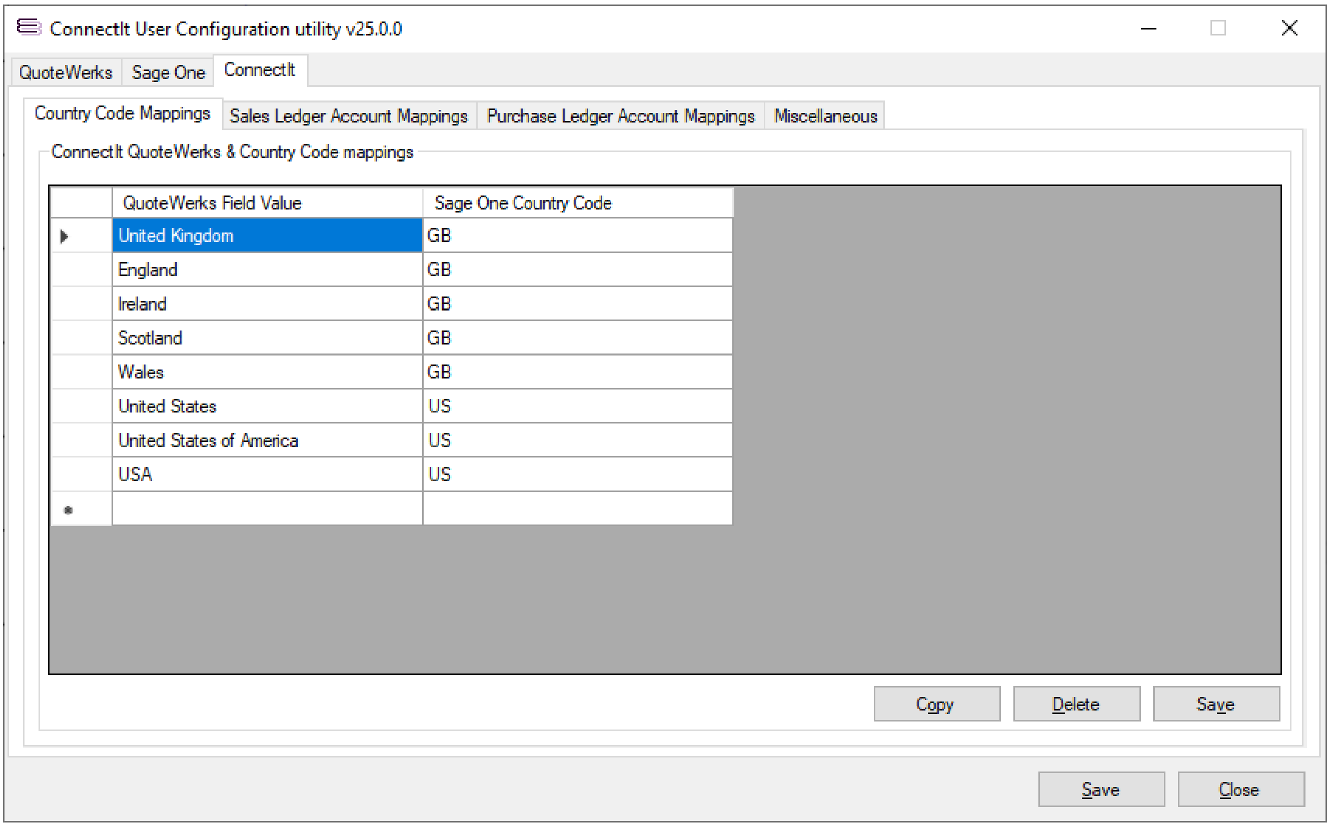


1. Click the **Get Business** button to view a list of the Businesses available in your Sage One Business Cloud account. You can the select the appropriate Business to populate the **Business Name** and **ID** fields.
2. Similarly with the other “Get…” button options, you will be presented with a list of the associated records in your Sage One Business Cloud account to modify the default settings that are applied.

NOTE: The Contact Type, Default Address Country Code and Default Tax Rate Code settings are used when creating a Contact in Sage One Business Cloud. The Taxable Tax Rate Code, Non-Taxable Tax Rate Code and Default Sales / Purchase Ledger Account settings are used when creating document line items in Sage One Business Cloud.

ConnectIt Country Code Mappings

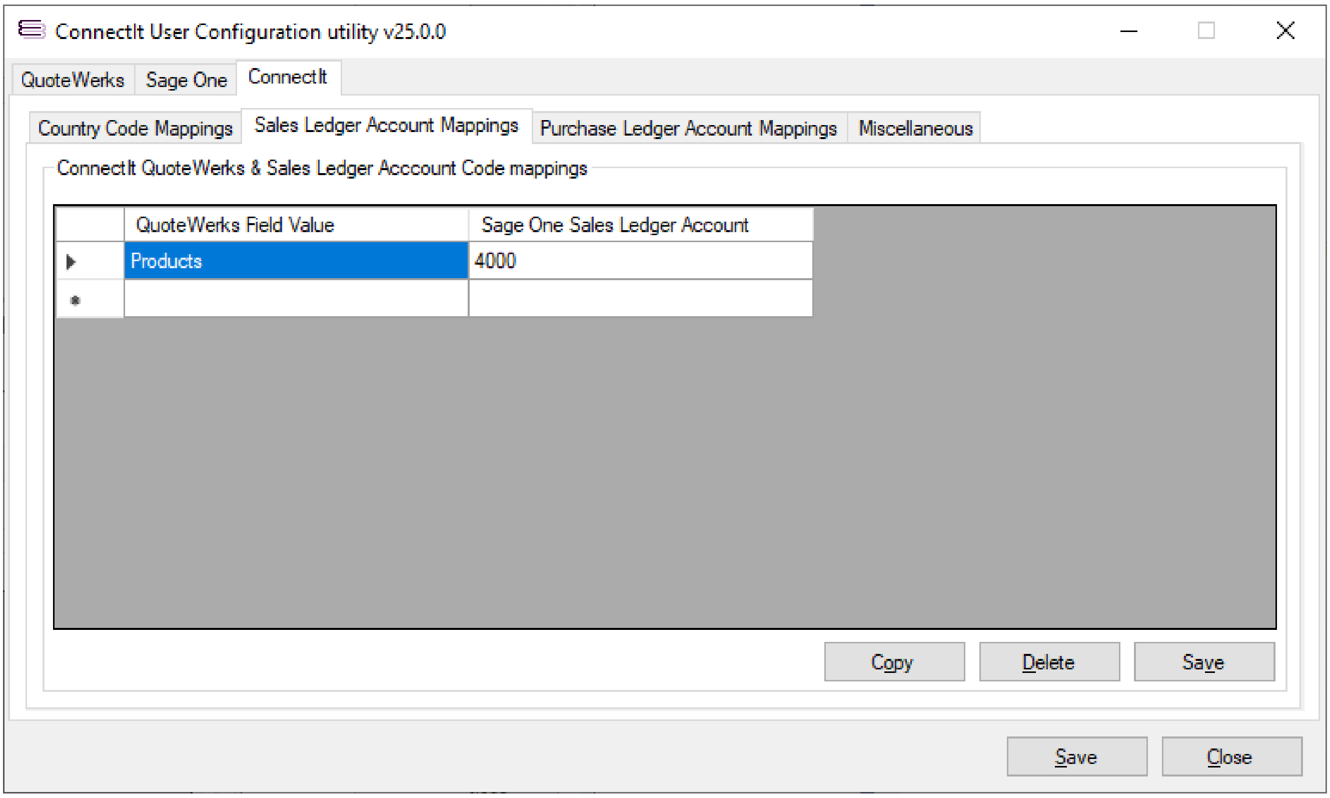
The **ConnectIt tab -> Country Code Mappings tab** provides functions to set up how Countries should be assigned to Contacts' and documents' Main and Delivery Addresses when creating records in Sage One Business Cloud.



1. The **QuoteWerks Field Value** is the value that has been entered into the QuoteWerks Document Country (see **QuoteWerks Database Document Headers Table Settings** section above).
2. The **Sage One Country Code** is the Code to be used for the associated **Field Value**.
3. The **Copy** button copies the contents of the grid to the Windows clipboard for pasting into another application (such as Excel) for analysis.
4. The **Delete** button removes the currently selected row from the grid.
5. The **Save** button writes the settings to the configuration file.

ConnectIt Sales Ledger Account Mappings

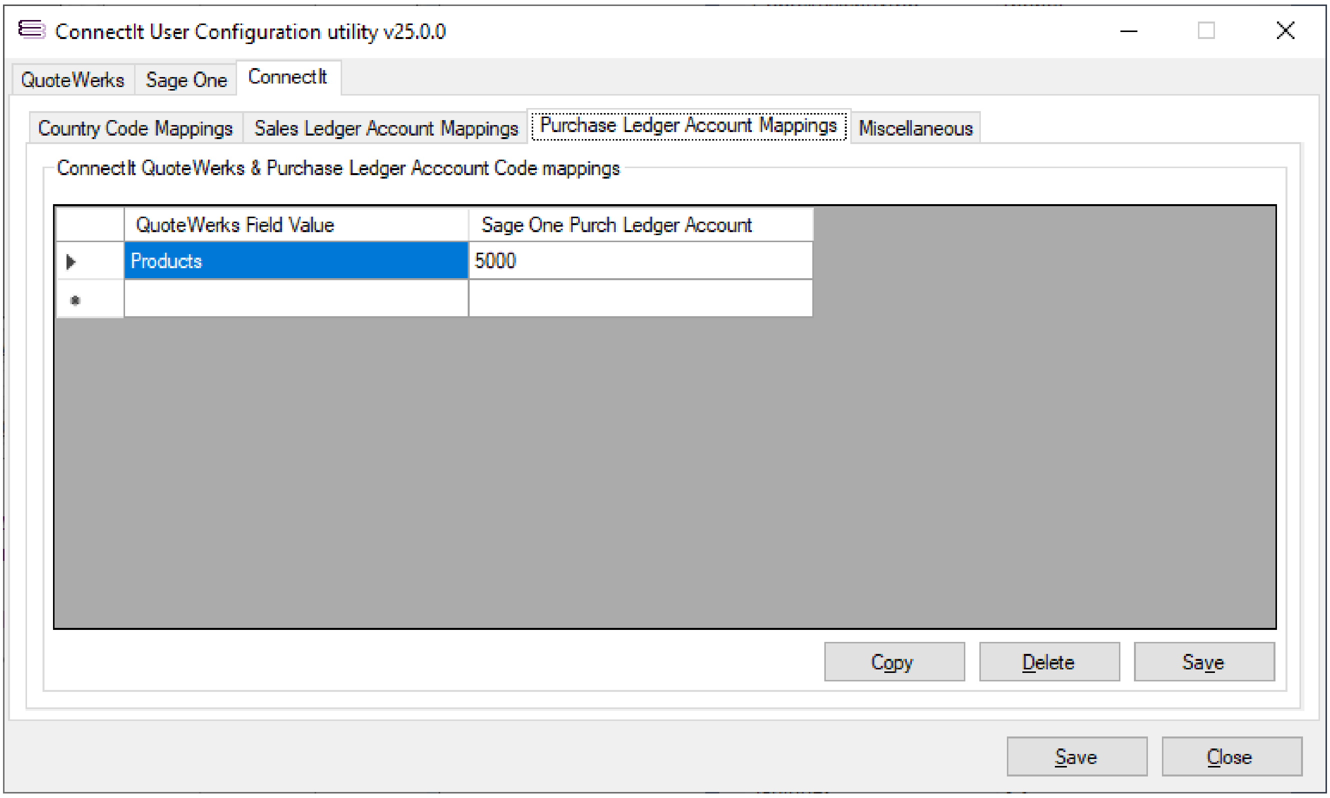
The **ConnectIt tab -> Sales Ledger Account Mappings tab** provides functions to set up how Tax Codes should be assigned to Line Items when creating documents in Sage One Business Cloud if a line-specific Tax Code has not been entered onto the QuoteWerks document.



1. The **QuoteWerks Field Value** is the value that has been entered into the **Sales Ledger Acc. Field** field on the QuoteWerks Document Line Item (see **QuoteWerks Database Document Items Table Settings** section above).
2. The **Sage One Sales Ledger Code** is the Tax Code to be used for the associated **Field Value**.
3. The **Copy** button copies the contents of the grid to the Windows clipboard for pasting into another application (such as Excel) for analysis.
4. The **Delete** button removes the currently selected row from the grid.
5. The **Save** button writes the settings to the configuration file.

ConnectIt Purchase Ledger Account Mappings

The **ConnectIt tab -> Purchase Ledger Account Mappings tab** provides functions to set up how Tax Codes should be assigned to Line Items when creating documents in Sage One Business Cloud if a line-specific Tax Code has not been entered onto the QuoteWerks document.

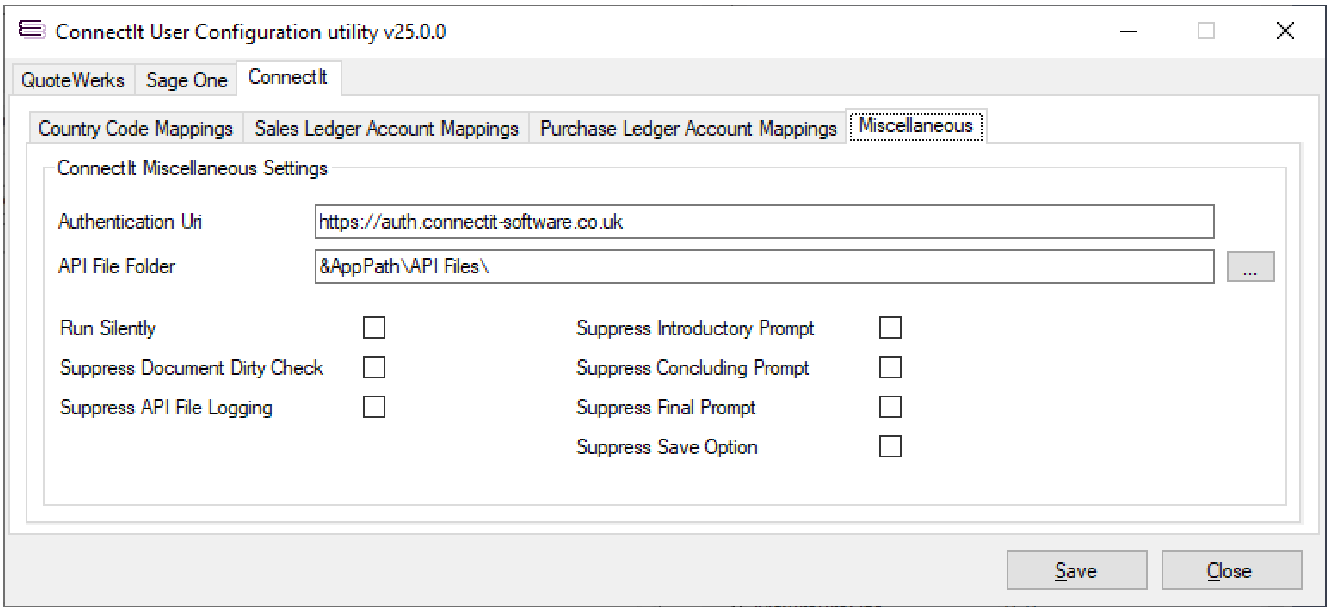


1. The **QuoteWerks Field Value** is the value that has been entered into the **Purchase Ledger Acc. Field** field on the QuoteWerks Document Line Item (see **QuoteWerks Database Document Items Table Settings** section above).
2. The **Sage One Purchase Ledger Code** is the Tax Code to be used for the associated **Field Value**.
3. The **Copy** button copies the contents of the grid to the Windows clipboard for pasting into another application (such as Excel) for analysis.
4. The **Delete** button removes the currently selected row from the grid.
5. The **Save** button writes the settings to the configuration file.

ConnectIt Miscellaneous Settings

The **ConnectIt tab -> Miscellaneous tab** provides options to save out QuoteWerks and Sage One Business Cloud integration process communications and suppress the warning messages that the **ConnectIt** application generates when processing information from the QuoteWerks document.

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



1. The **Authentication Uri** option is available, but it should only be modified if you are advised to do so by ConnectIt-SageOne support.
2. **API File Folder** is the path to a folder where the integration processes will save out files containing details of the QuoteWerks and Sage One Business Cloud communications. These files may be useful to support when querying Sage One Business Cloud issues.

NOTE: this supports the use of the &AppPath macro which is a reference to the folder where ConnectIt was installed.

3. Ticking **Run Silent** means that **ConnectIt** will run without prompting the QuoteWerks User of any interaction with the Sage One Business Cloud API, even if they fail to execute correctly.

NOTE: the Run Silent function overrides setting any of the "Suppress…" options.

4. Ticking **Suppress Document Dirty Check** means that the User will not be prompted if the document is unsaved or has changed since it was last saved.
5. Ticking **Suppress Introductory Prompt** means that the User will not be prompted with a "you are about to…", "would you like to continue" type message.
6. Ticking **Suppress Concluding Prompt** means that the User will not be prompted with a "these details have been updated" type message.
7. Ticking **Suppress Final Prompt** means that the User will not be prompted with a "the process completed ok" type message.
8. Ticking **Suppress Save Option** means that the User will not be asked if they would like to save the changes when they have been made to a document by the **ConnectIt-SageOne** process that has just been run.