Creating a New Customer from a QuoteWerks Quote

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The creation of a new Customer from a QuoteWerks Quote that has been converted to an order in the QuoteWerks application is accomplished from the Job Management Module. During this process a new Customer and Site is created along with billing information. Once the new Customer and Site is created, the setup of the Job immediately follows where the User will enter the Job Work Order and Job System information. If the QuoteWerks quote was for an existing customer, the Job creation forms are slightly different. This help topic will cover the process for new customers only. If you are importing a Job for an existing customer, follow the link: Creating a Job from QuoteWerks-Existing Customer.

Follow the instructions below to create a new Customer/Job.
1. From the Main Application Menu Tree select Job Management / Job Queue.
2. The Open Job List will be displayed. Click the QuoteWerks icon button located on the upper toolbar.

3. The QuoteWerks Orders to Process list will be displayed. Highlight the row of the order to process into a new Customer and Job then click the Create Job button located at the lower right of the list.

4. The QuoteWerks Order Confirmation form will be displayed. Review the information in this form to make certain this is the correct order for which a new Customer and Job will be created. Click the OK button located at the lower right of the form to proceed.

The New Customer Setup form will be displayed. This form is divided into three data entry forms; Customer Information, Site Setup and Custom Fields. Each of these data entry forms will be covered below and on the following pages.

Customer Information
5. The information defaulted into most of the Customer Information fields was imported from the information entered on the quote within the QuoteWerks application. Review the information and make any necessary corrections to the data. When finished, click the Site Setup tab located to the right of the Customer Information tab.

Site Setup
6. The information defaulted into most of the Site Setup fields was imported from the information entered on the quote within the QuoteWerks application. Review the information and make any necessary corrections to the data. When finished, click the Custom Fields tab located to the right of the Site Setup tab. If the Custom Fields tab is grayed-out or if the Custom Fields tab is not displayed, this indicates your company has elected not to use the Customer Custom Fields at this time or the User does not have permissions to access the Customer Custom Fields form. If this is the case, proceed to step number 8 below.
7. The Custom Fields form will be displayed. This is an optional form for gathering information important to your company. Make selections in the required fields and other optional fields according to your company policy and procedures. Required fields are highlighted in yellow. You will not be able to save the Customer record until selections

or data is entered into fields flagged as required.
8. Once all information has been entered for the Customer, Site, and Custom Fields, click the Save button located at the lower right of the New Customer Setup form. You will be presented with a message confirming you are ready to save the new customer; click the Yes button to proceed.

Job Work Order Form
9. The New Job form will open and the Work Order data entry form will be displayed. Fill in the required and optional fields according to your company policy and procedures. Once this form is completed, click the Apply button located at the lower right of the Work Order form.
In the Work Order illustration below, the fields highlighted in yellow are required. The Salesperson will automatically fill in with the name of the Salesperson that was entered on the QuoteWerks quote. The Sold Date will automatically default to today's date. Typically this date is changed to the date the sale closed or the contract date.

Job System Form
10. The Job System form will be displayed.
At the beginning of this process when a new customer and site is created, a system record is not a part of the new customer setup. At this point you will select a System Type on the Job System form and click on Apply to save. You will navigate to the Customer Explorer record for this customer, create a System record, save and then return to this Job System form to import the System information you just setup on the Customer Explorer.
The reason for leaving the Job record and manually building the System record is to be able to create a service ticket while the Job is in process.

11. After saving the Job System form, the main job toolbar will fill with other options. On the Main Application Toolbar, click on the Customer Tree button to open the Customer Explorer record for this customer where you will manually create the System record.

12. The Customer Explorer will be displayed. On the customer tree, click on the Systems tree option, right-click and select the New System option. The New System data entry form will be displayed. Fill in as much information as is known at this time, then click on the Save button at the lower right of the form.
Finally, close the Customer Explorer record by clicking on the at the upper right of the record. You will be returned to the Job record. Continue on to the next help page.

13. You will be returned to the Job record. Click on the Job System button from the Job Toolbar.
14. On the Job System form, un-check the box to the left of the New System. To the right of the System Account field, click on the lookup button. The Select Customer System list will be displayed. Click on the System to be used on this Job then click on the Save button.
A confirmation message will be displayed, click on the Yes button to accept. When finished, click on the Apply button at the lower right of the Job System form.

15. Once the Job System form has been saved, typically at this point, the User converting the QuoteWerks order to a

new Customer and Job will review the items defaulted in from the QuoteWerks quote; Install Charges, Recurring Charges and Materials. The remainder of processing and data entry functions of a Job is covered in the Job Management section of SedonaOffice Help.

After the new Customer and Job has been saved, additional information such as Contacts, additional Bill To records, Credit Card or Customer Bank, Central Station Tracking information may be added to the customer according to your company's policies and procedures.