Create a Job for a New Customer

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Once a Quote in QuoteWerks has been converted to an Order, it will appear in a list of Orders to convert into Jobs in SedonaOffice. This Orders list is accessed by clicking the QuoteWerks button located on the Job Queue button toolbar in SedonaOffice. Only SedonaOffice customers subscribing to the QuoteWerks integration and have the QuoteWerks application installed at their workstation will have the QuoteWerks button displayed.

To create a new Job from a QuoteWerks Order for a new SedonaOffice Customer, follow the steps listed below.

1. From the Main Application Tree, navigate to the Job Management/Job Queue.

2. The Open Job List will be displayed. click the QuoteWerks button located on the Job button toolbar.

3. The QuoteWerks Orders to Process List will be displayed. Highlight the Order to convert to a Job then click the Create Job button located at the lower right of the form.

4. The QuoteWerks Order Confirmation form will be displayed; click the OK button at the lower right of the form.

5. The New Customer Setup form will be displayed on the Customer Information data entry form. The name and address information automatically filled into this form was pulled from the information on the QuoteWerks form. This is the customer Billing name and address information; if this information is not the correct you may modify any of the information. Fill out this form according to your company policy and procedures. When finished, click the Site Setup form tab.

6. The Site Setup form will be displayed. The name and address information automatically filled into this form was pulled from the Ship To information in QuoteWerks. If this information is not the correct site information the User may modify any of the information. Fill out this form according to your company policy and procedures.

When finished, click the Custom Fields (last tab) form tab. If the Custom Fields tab is grayed-out, this indicates either your company is not using Custom Fields at this time or you do not have permissions to access this form.

If your company is not using Custom Fields, click the Save button located at the lower right of the Site Setup form.

8. The Custom Fields form will be displayed. This form is used to enter additional information related to the Customer. Fill in the fields according to your company policy and procedures. When finished, click the Save button located at the lower right of the form.
After clicking the Save button, a confirmation message will be displayed asking if you are ready to save the new customer; click the Yes button on this message form to proceed.

9. The Job Work Order Entry form will be displayed. This is the first data entry form for the new Job. Most of the information on this form will automatically be filled in from the Customer and Site information. Fill out this form

according to your company policy and procedures. Four fields on this form are required to be able to save and advance to the second Job setup form; Job Type, Install Company, Salesperson and Sold Date.

When finished filling out this form, click the Apply button located at the lower right to save and advance to the Job System form.

10. The Job System form will be displayed. If your company may need to create a Service Ticket for the system being installed while the Job is in progress, it would not be possible until the Job is closed. Since Service Tickets are linked to a System record, to be able to create a Service Ticket for this system you would need to setup the System information on the Customer Explorer record first; this method is highly recommended. System records are not created from QuoteWerks data.

At this point, select a System Type (required field), then click the Apply button on the System form. You will then open the Customer Explorer record for the new Customer, setup the System information then return to the Job System form and import that information into the Job.

11. From the Main Application Button Toolbar, click the Customer Tree button to open the Customer Explorer record.

12. Once the Customer Explorer record is displayed, highlight Systems option from the Customer Tree; right-click and select the New System option.

13. The System form will be displayed. Fill out this form according to your company policy and procedures. When finished, click the Save button, then close the Customer Explorer form.

14.   Once the System record has been setup on the Customer Explorer, return to the Job record. The next step will load the System information into the Job.
15. Click on the Job System button from the Job toolbar. In the Job System form, un-check the New System checkbox at the top left of the form.
16.   Click the lookup button to the right of the System Account field. The Select Customer System form will be displayed. Highlight the System record then click the Save button at the lower right of the form.

17. A confirmation message will be displayed; click the Yes button to proceed.

18. The System form will fill in with all the information setup from the Customer Explorer. Click the Apply button to save the information loaded into this form.
While the Job is in process, any changes that need to be made to any of the fields of the System record must be done from the Job System form. When the Job is closed, the Job System information will overwrite the System information displayed in the Customer Explorer.

Follow the link for the next step in data entry,Job Installs/Recurring/Materials.