

Job for an Existing Customer Overview and Topics

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Jobs are created for a QuoteWerks quote from the Job Management Job Queue. Jobs may be created for:

- Existing customers at an existing site with an existing system
- Existing customers at an existing site for a new system
- Existing customers for a new site and a new system

The process steps vary depending on the situation.

When the information from the QuoteWerks quote is imported into the job, this includes:

- Install Charges
- Recurring Charges
- Materials List

The User creating the job has the responsibility to verify all items are correct to proceed with the job.