

Create a New Job Overview and Topics

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There are four methods of creating a new Job in SedonaOffice. Click on the links below for each job creation method.

1. [Creating a Job when converting a Prospect Opportunity into a Customer/Job - Process begins in Sales Management](#)
2. [Creating a Job from a QuoteWerks Quote - Process begins in Job Management](#)
3. [Creating a Job from a WeEstimate Quote - Process begins in Job Management](#)
4. [Creating a Job manually - Process begins from the Customer Explorer or the Job Queue](#)

To be able to create a Job from either QuoteWerks or WeEstimate, your company must first purchase the integration with SedonaOffice and purchase either software. QuoteWerks must be purchased from SedonaOffice, and WeEstimate is purchased directly from WeSuites (parent company of the WeEstimate software). Training for each partner quoting product is arranged directly between your company and the partner company.

Your company should plan the process flow for which staff members will be creating new Jobs and how the processing of Jobs will flow through to various departments within your company.

When creating a new Job, two main data entry forms must be completed; the Work Order and the Job System Information. Typically the accounting department creates the Job then forwards the Job on to the Installation department for further processing.

This section will describe creating a new Job; the processing instructions will stop after the typical initial data entry forms are completed. Additional processing of the Job such as creating Purchase Orders for Parts and scheduling Installer Appointments are covered under [Processing a Job](#).

A major element of each Job is the Job Task List. Moving a Job through processing is guided by a well planned use of the Job Status linked to each Job Task. As Job Tasks are approved by the User responsible for completing the Task, the Job advances to the Status of the next Job Task line.

The Job Queue, which is a listing of all Jobs in process, displays the Status of each Job and can be filtered by Job Status. Users access the Job Queue to locate Jobs that require action. For example a Job Status may be labeled Order Parts; the person responsible for purchasing parts will filter the Job Queue on this status to display a list of only the Jobs currently at the Order Parts status and work with just this list of Jobs.

Initial Job Setup steps in this section will include the items listed below. Items followed by an asterisk only apply when creating a Job for a new Customer or a new Site for an existing Customer.

Customer Setup *

Materials List

Site Setup *

Job Approvals

Work Order

Job Costing Estimate

Job System Setup

Commissions

Install Charges

Custom Fields

Recurring Charges
