

Jobs from QuoteWerks Overview and Topics

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Jobs are created for a QuoteWerks quote from the Job Management Job Queue. Depending on the situation, the process steps vary. Follow the links below for instructions on the creation of a new Job in each of the following scenarios:

[New Customer](#)

[Existing Customer/Existing Site/New System](#)

[Existing Customer/Existing Site/Existing System](#)

[Existing Customer/New Site/New System](#)

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. Only SedonaOffice customers subscribing to the QuoteWerks integration and have the QuoteWerks application installed at the workstation processing the Quote/Job will have this button displayed.

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.