QW-Job for Existing Customer/Site/System

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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. Un-check the New Customer option. Un-check the New Customer option. Click the lookup button to the right of the Existing Customer Field; locate and select the customer for which the Job is being created. In the Job Site field, click the arrow to the right of the field and select the Site for which the Job is being created, then click the OK button.

5. 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.

6. The Job System form will be displayed. In the Job System form, un-check the New System checkbox at the top left of the form. 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.

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

8. 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.