

QW-Installs/Recurring/Materials

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For Jobs created from a QuoteWerks Quote, and Install Charges, Recurring Charges, and the Materials List, each of these items are imported automatically into the Job. For the User creating the Job, for these three items, it is a review process to make certain the data is correct. Changes, deletions or additions may be made to the imported items by the User.

Installs

The Install lines will automatically fill in from the non-recurring Sales Items contained on the QuoteWerks Quote record. These Install lines may be modified or deleted by the User if necessary. Additional Install Charge lines may be added or deleted if need.

Once saved, Install Charges will display in the Sales Summary form.

Once an invoice has been created for the Job, Install charge lines may not be modified; any changes to Install charges will require creating a Change Order.

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Recurring

The Recurring lines will automatically fill in from the Recurring Items entered on the QuoteWerks Quote record. These Recurring lines may be modified or deleted by the User if necessary, including adding a Sub Item Of code if needed. Additional Recurring lines may be added.

Once saved, Recurring Charges will display in the Sales Summary form.

Once recurring services have been invoiced on a Job Invoice, the recurring line(s) will be activated and appear in the Customer Explorer record and will begin to bill with the next eligible cycle invoice batch.

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Materials

The Materials form will automatically fill in with the parts entered on the QuoteWerks Quote. You may modify the parts list or add additional parts or remove parts imported from the QuoteWerks Quote.

Once the Materials list has been saved, the Capture Original Parts button will be displayed at the lower left of the list. Clicking this button saves the original parts lists and creates a new "Working Parts List". If any changes need to be made to the parts list after the capture, this is done from the working parts list. A User may toggle back and forth between the original parts list and the working parts list to see what changes have been made as the job progresses.

After "Capturing" the original parts list, if it is discovered the capture was performed before the parts list was completed, a User with the appropriate permission will have access to the Override Parts Capture button. Clicking the Override Parts Capture button will create a new Original and Working parts list.

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Follow the link for the next step in data entry, [Job Costing Estimate](#).