How to Send a Prospect Record to QuoteWerks

Once a new Prospect has been created, the Name, Address, Phone, and email address information may be sent to the QuoteWerks application to prepare the quote and proposal for the Prospect.

Note: If your company has purchased the QuoteWerks software, and purchased the integration option with SedonaOffice, and you have installed the QuoteWerks application on your workstation, you are able to export information contained on the Prospect record to QuoteWerks to build a quote for the Prospect. Once the sale is closed, the information from QuoteWerks is brought back into SedonaOffice to create the Customer, Site and Job record.

Follow the instructions listed below to send Prospect information to the QuoteWerks application.

1. Navigate to the Sales Management/Prospect menu option from the Main Application menu.

2. The list of Prospects will be displayed. Double-click on the Prospect record to be sent to QuoteWerks.

3. Once the Prospect record is open, click the QuoteWerks button from the Prospect toolbar on the left.

4. The QuoteWerks list will be displayed. Click the New button located at the lower right of the QuoteWerks form.

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6. The QuoteWerks application will open to a new Quote on the Documents Items tab. Navigate to the Sold To/Ship To tab.

7. The Name, address, telephone numbers, email address will automatically fill into the three Name/Address sections of the Sold To/Ship To form. The three Name/Address sections (Sold To, Ship To, and Bill To) have a special purpose when importing back into SedonaOffice as a new Customer and Site.

- Sold To - The name entered into this area will be used to populate the Customer Name field on the New Customer setup form in SedonaOffice.
- Ship To - The name and address entered into this area will be used to build the Site record within SedonaOffice.
- Bill To - The name and address entered into this area will be used to build the primary Bill To record within SedonaOffice.

8. The Salesperson will develop the Quote according to your company policies and procedures.

9. Once the sale is closed, the Salesperson or another staff member will open the Quote and mark it as an Order. While the Quote is open, from the Main Menu at the top of the QuoteWerks application, select File/Convert to Order.

10. Once the Quote has been converted into an order, it will appear in the SedonaOffice Job/QuoteWerks Orders to Process List. To process the new Job from a QuoteWerks quote, click on the link.