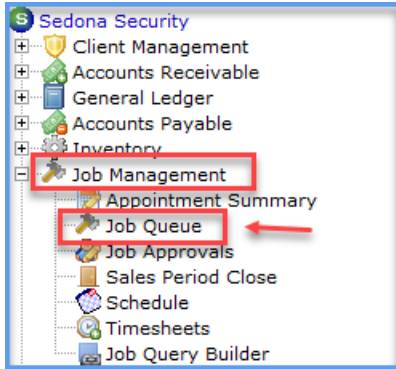


# Create a New Job Imported from WeSuite

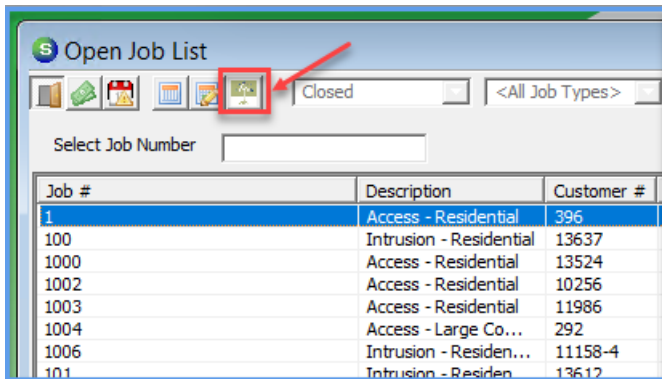
Last Modified on 05/12/2026 9:25 am EDT

## Job Management

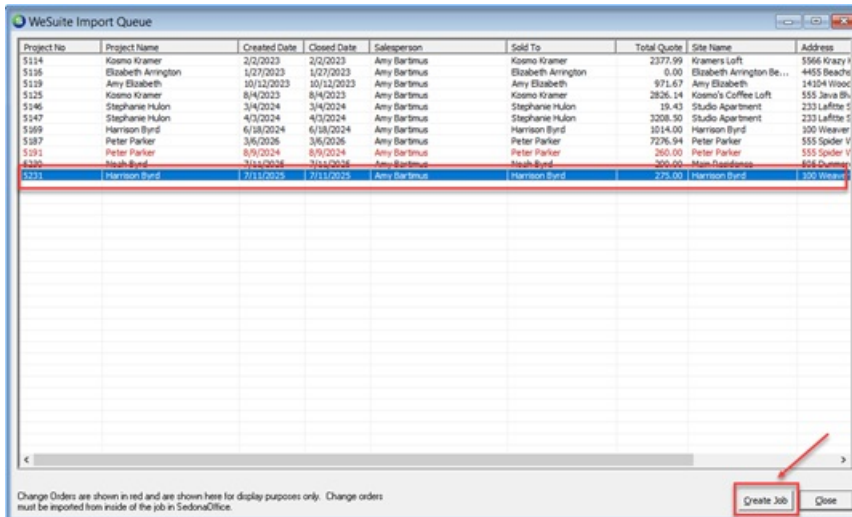
In Sedona Office, go to the Job Management Module and click on Job Queue.



When the Open Job List screen opens select the WeSuite Orders to Process Icon.

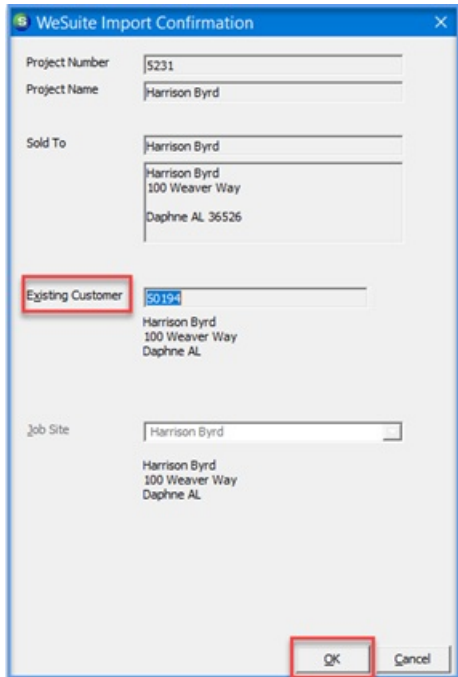


The WeSuite Import Queue will open, highlight the Estimate and select Create Job.



The WeSuite Import Confirmation screen opens with the Customer Information. The below example is for an existing Customer in Sedona Office.

Confirm the information is correct and click OK.



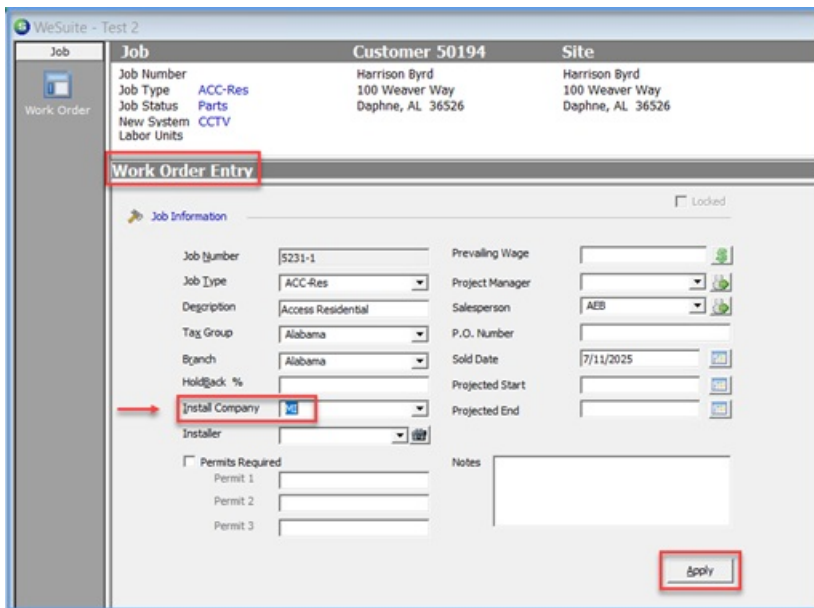
The image shows a 'WeSuite Import Confirmation' dialog box. It contains the following fields and values:

- Project Number: 5231
- Project Name: Harrison Byrd
- Sold To: Harrison Byrd, Harrison Byrd, 100 Weaver Way, Daphne AL 36526
- Existing Customer: 50194, Harrison Byrd, 100 Weaver Way, Daphne AL
- Job Site: Harrison Byrd, Harrison Byrd, 100 Weaver Way, Daphne AL

At the bottom right, there are 'OK' and 'Cancel' buttons. The 'OK' button is highlighted with a red box.

When the Work Order Screen opens, confirm the imported information shown is correct and if needed add any additional information.

Select an Install Company(required) from the drop down menu. Click Apply.



The image shows the 'WeSuite - Test 2' application window. The 'Work Order Entry' screen is active. It displays a summary table at the top and a detailed form below.

Job	Customer 50194	Site
Job Number	Harrison Byrd	Harrison Byrd
Job Type	ACC-Res	100 Weaver Way
Job Status	Parts	Daphne, AL 36526
New System	CCTV	Daphne, AL 36526
Labor Units		

The 'Work Order Entry' section includes the following fields:

- Job Number: 5231-1
- Job Type: ACC-Res
- Description: Access Residential
- Tag Group: Alabama
- Branch: Alabama
- Holdback %: [empty]
- Install Company: [dropdown menu with 'W' selected]
- Installer: [dropdown menu]
- Permits Required: Permit 1, Permit 2, Permit 3
- Prevailing Wage: [empty]
- Project Manager: [empty]
- Salesperson: AEB
- P.O. Number: [empty]
- Sold Date: 7/11/2025
- Projected Start: [empty]
- Projected End: [empty]
- Notes: [text area]

An 'Apply' button is located at the bottom right of the form, highlighted with a red box.

Next the Job System screen will open. If this is a New System, the New System checkbox will be selected.

The System Account number will default with the Customer Number but can be edited along with the System Type. Click Apply.

Job: Job Number 5231-1, Job Type ACC-Res, Job Status Parts, New System CCTV, Labor Units 0.0 (0.0 Used)

Customer 50194: Harrison Byrd, 100 Weaver Way, Daphne, AL 36526

Site: Harrison Byrd, 100 Weaver Way, Daphne, AL 36526

System and Service Information:

- New System
- System Account: 50194-5231-1
- System Type: CCTV

Contract Information:

- Contract Form: [Dropdown]
- Contract Number: 50194
- Contract Months: [Dropdown]
- Renewal Months: [Dropdown]

Inspections:

- Frequency: [Dropdown]
- Service Problem Code: [Dropdown]
- Service Level: T&M Resi-MI
- Next Inspection: [Dropdown]
- Notes: [Text Area]

Apply

If the System is an existing System on the Customer Account, uncheck the New System checkbox and select the Customer Systems Icon and the appropriate System Code/Alarm Account. Click Save.

Job: Job Number 5231-1, Job Type ACC-Res, Job Status Parts, New System CCTV, Labor Units 0.0 (0.0 Used)

Customer 50194: Harrison Byrd, 100 Weaver Way, Daphne, AL 36526

Site: Harrison Byrd, 100 Weaver Way, Daphne, AL 36526

System and Service Information:

- New System
- System Account: 50194-5231-1
- System Type: CCTV

Select Customer System:

System Code	Alarm Account
50194-1	Installation
50194	Access
50194-5	Access

Save Close

The Sales Summary screen will open, and the Imported Items will be shown: Installs, Parts and Recurring.

WeSuite - Test 2

Job	Customer 50194	Site
Job Number 5231-1	Harrison Byrd	Harrison Byrd
Job Type ACC-Res	100 Weaver Way	100 Weaver Way
Job Status Parts	Daphne, AL 36526	Daphne, AL 36526
New System CCTV		
Labor Units 5 (0 Used)		

**Sales Summary**

Installs	Item Code	Description	Quantity	Amount
** Labor Invoice- WeSuite		Install Labor Invoice- WeSuite	1	1500.00
* Equipment Rental		* Equipment Rental	1	275.00
<b>Total</b>				<b>\$1,775.00</b>

Parts	Part Code	Description	Quantity	Amount
	AX1005	DESC - AX1005 SURFACE MOUNT M...	5	1250.00
<b>Total</b>				<b>\$1,250.00</b>

<b>Total Non Recurring</b>	<b>\$3,025.00</b>
<b>Total Non Recurring Billed</b>	<b>\$0.00</b>
<b>Total Credits</b>	<b>\$0.00</b>
<b>Balance to Bill</b>	<b>\$3,025.00</b>

Recurring	Item Code	Description	Monthly Amt
Burg Monitoring		Burg Monitoring	25.00
<b>Total Recurring</b>			<b>\$25.00</b>
<b>Total Recurring Billed</b>			<b>\$0.00</b>

The Job Costing Screen will show the imported items in the Estimated Column.

WeSuite - Test 2

Job	Customer 50194	Site
Job Number 5231-1	Harrison Byrd	Harrison Byrd
Job Type ACC-Res	100 Weaver Way	100 Weaver Way
Job Status Parts	Daphne, AL 36526	Daphne, AL 36526
New System CCTV		
Labor Units 5 (0 Used)		

**Costing**

Estimated	Actual	Variance	WIP
<b>Income</b>			
Install Charge \$3,025.00	\$0.00	\$3,025.00	Material 1 \$0.00
Change Orders \$0.00	Hold Back \$0.00		Material 2 \$0.00
<b>Costs</b>			Labor \$0.00
Parts \$500.00	\$0.00	\$500.00	Subcontractor \$0.00
Labor 0.00	\$0.00	\$0.00	Equipment Rental \$0.00
Overhead 0.00	\$0.00	\$0.00	Permits \$0.00
Subcontractor \$0.00	\$0.00	\$0.00	Overhead \$0.00
Equipment Rental \$275.00	\$0.00	\$275.00	Commissions \$0.00
Permits \$0.00	\$0.00	\$0.00	Other \$0.00
Other \$0.00	\$0.00	\$0.00	<b>Total WIP</b> \$0.00
Sub Total \$775.00	\$0.00	\$775.00	<b>Recurings</b>
Sub Profit/Loss \$2,250.00 4%	\$0.00 100%	\$2,250.00	<b>Est</b>
Commissions \$0.00	\$0.00	\$0.00	Job RMR \$25.00
<b>Total</b> \$775.00	\$0.00	\$775.00	<b>Act</b>
<b>Profit/Loss</b> \$2,250.00 4%	\$0.00 100%	\$2,250.00	Activated RMR \$0.00

Apply  Include WIP Amounts