

For Internal Testing - How to Change Customer on a Quote in WeSuite

07/03/2024 9:02 am EDT

This article is meant to assist internal support reps testing in wesuite. Customers should instead review WeSuite's support documentation.

- Open the Job in WeSuite

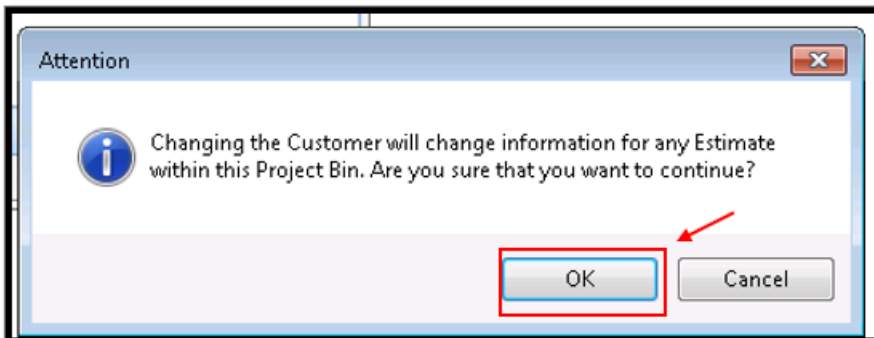
Click on the “Customer Information Tab”



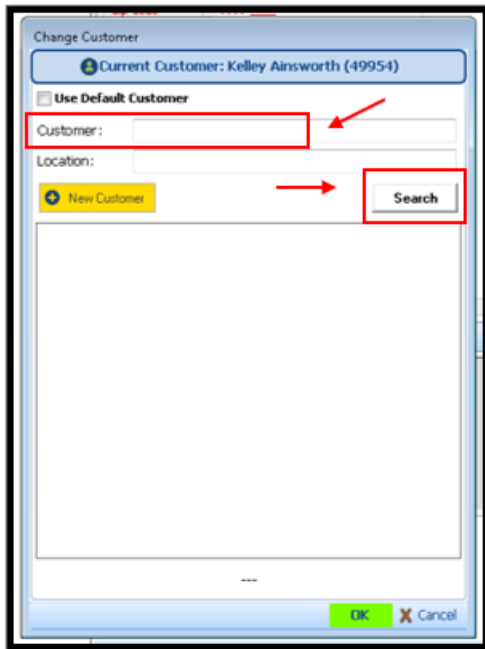
- Click on “Change Customer” button.



- A screen will pop – Letting you know that any Estimate under this Customer will all also be updated with the change. If you want to proceed, select OK.



- Enter the Customer in the Search Field and click “Search.”



- Select the Customer and click "OK."
When you have selected the correct Customer Account, select OK.

Change Customer

Current Customer: Kelley Ainsworth (49954)

Use Default Customer

Customer: amy elizabeth

Location:

New Customer **Search**

Customers (50+)

- Amy Elizabeth (48804-1)** ←
- Sites
 - Amy Elizabeth : 14104 Woodland Ridge
 - Amy Elizabeth : 14104 Woodland Rdige
- Billing
 - Amy Elizabeth :
 - Amy Elizabeth : 14104 Woodland Rdige
- Amy Elizabeth (49855)**
 - Sites
 - Amy Elizabeth Residence : 14104 Woodland Ridge
 - Billing
 - Amy Elizabeth : 14104 Woodland Ridge
- Allen, Elizabeth (24084)

Using Existing Customer →

Amy Elizabeth (48804-1)

→ **OK** **X Cancel**