

For Internal Testing - Resetting WeSuite Estimates for Import into SedonaOffice

07/03/2024 9:04 am EDT

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

Resetting WeSuite Estimates for Import into SedonaOffice

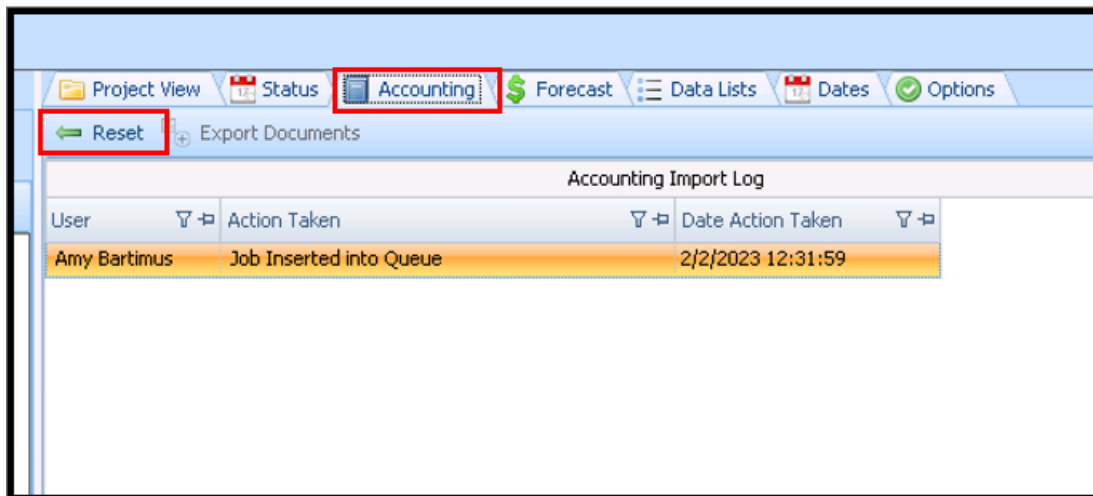
On occasion, changes need to be made to estimates in WeSuite after they have already been marked for import into SedonaOffice. When this happens the import needs to be reset. How it is reset will depend on whether the estimate is still pending in the SedonaOffice import queue, or has already been imported as a job.

Resetting Estimates that Still Appear in the Import Queue

In WeSuite

Go to WeSuite and open the estimate that needs to be corrected.

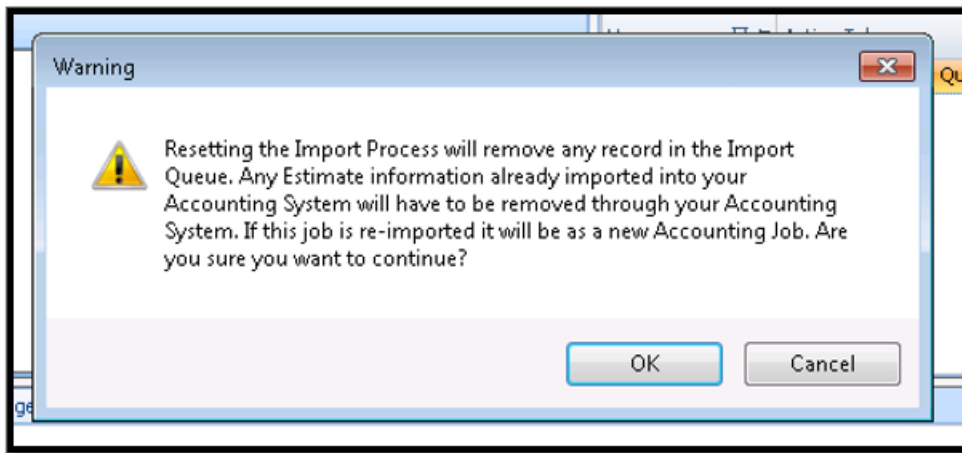
Select the "Accounting" Tab and Select "Reset"



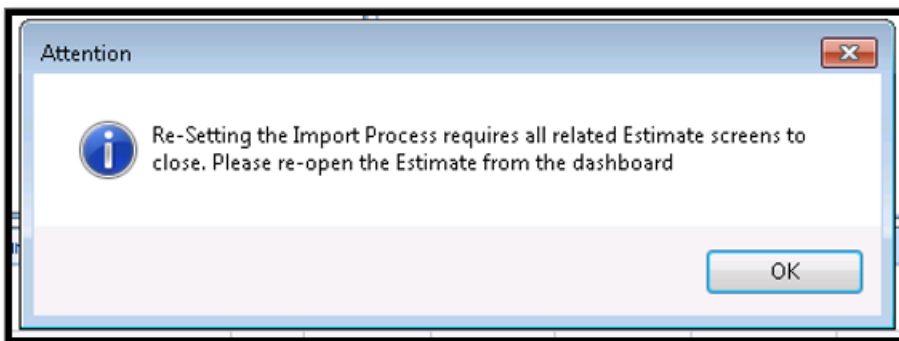
A pop up will appear letting you know 3 things:

- Any record that has been imported into the WeSuite Queue in SedonaOffice will be removed.
- Any Estimate that has already been imported and the Job has been created will need to be removed with a Sales Reversal within the Job.
- If this Job is re-imported it will be a New Job with a New Job Number.

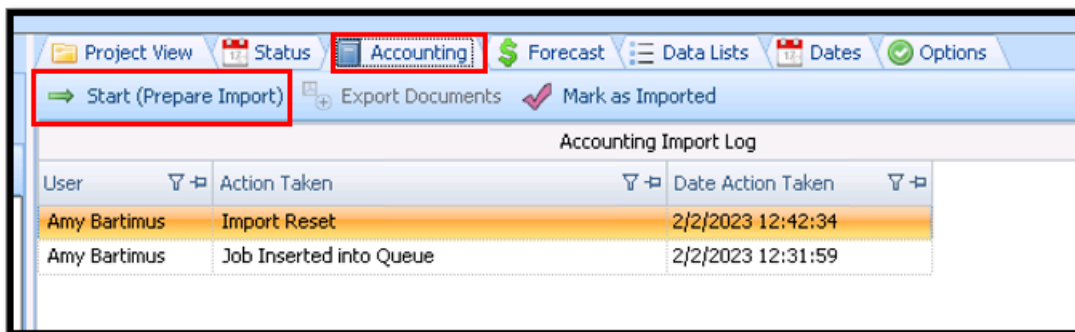
Do you want to continue? Yes.



Another pop-up will appear letting you know that All Estimate screens within WeSuite will need to be closed. Re-open the Estimate through the dashboard.
Click Ok.



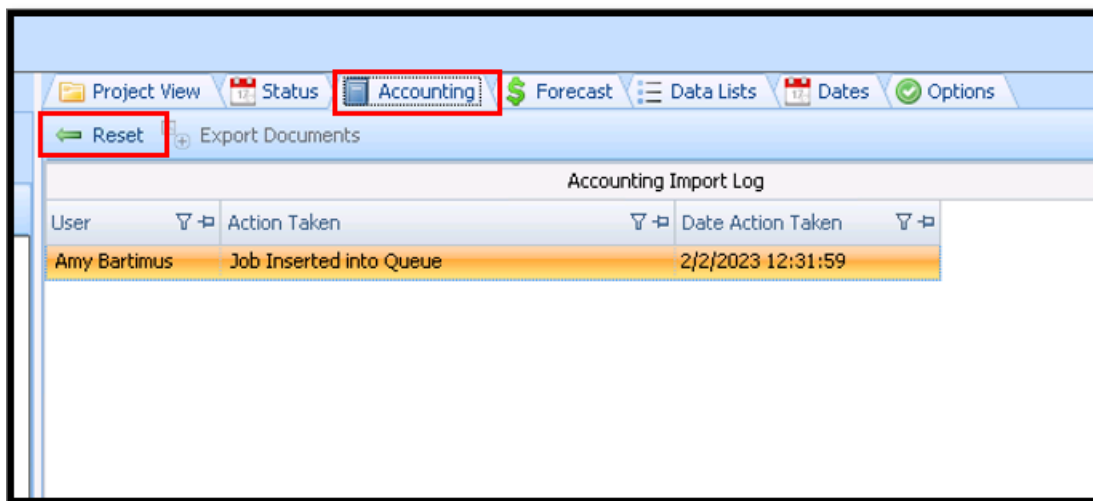
This process will remove the Estimate from the WeSuite Queue in Sedona Office.
Re-open the Estimate in WeSuite and make the necessary changes.
When you are ready to Import the Estimate go to the "Accounting" Tab and select "Start (Prepare Import)" and complete the normal Import process to Sedona Office.



Resetting Estimates that have already been Imported as a Job

In WeSuite

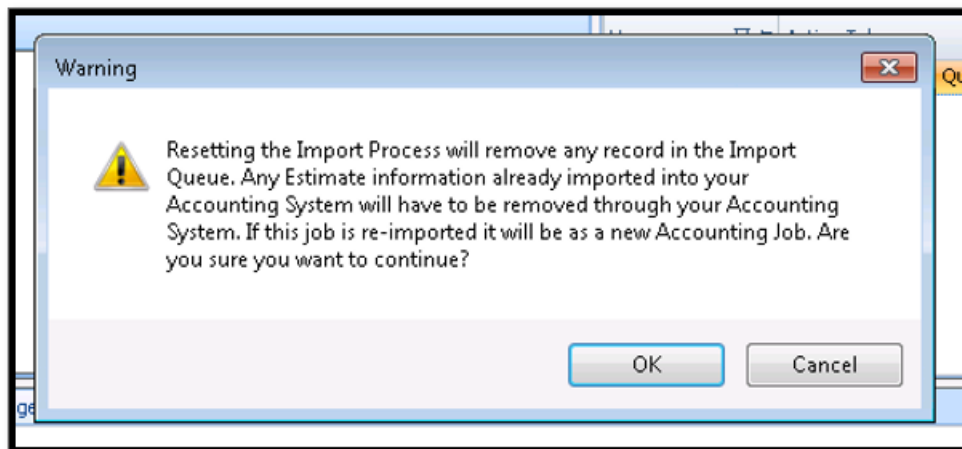
Go to WeSuite and open the Estimate that needs to be corrected.
Select the "Accounting" Tab and Select "Reset"



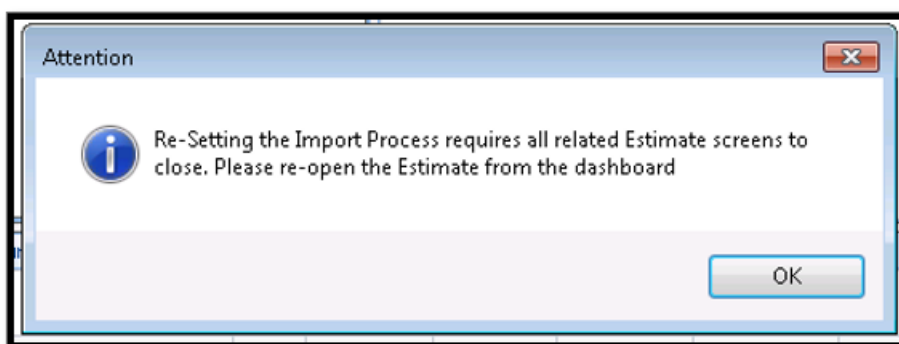
A pop-up will appear letting you know 3 things:

- Any record that has been imported into the WeSuite Queue in SedonaOffice will be removed.
- Any Estimate that has already been imported and the Job has been created will need to be removed with a Sales Reversal within the Job.
- If this Job is re-imported it will be a New Job with a New Job Number.

Do you want to continue? Yes.



Another pop-up



will appear letting you know that All Estimate screens within WeSuite will need to be closed. Re-open the Estimate

through the dashboard.
Click Ok.

In Sedona Office

Once the “Reset” has been performed in WeSuite, locate the Job that was created from that Estimate in Sedona Office. Go to the “Work Order” tab and select “Sales Reversal” and complete the Reversal Process.

The screenshot shows the 'Work Order Entry' form in Sedona Office. The top section displays job details: Job Number 5116-7, Job Type CCTV-Res, Job Status Parts, System 48977 CCTV, and Labor Units 0. (0. Used). The Customer is Elizabeth Arrington (2345 Sunny Lane, Daphne, AL 36526) and the Site is Elizabeth Arrington Beach House (4455 Beachside Blvd, Daphne, AL 36526). The left sidebar contains navigation icons for Sales Summary, Work Order (highlighted with a red box), Job System, Bill To, Tasks, Installs (\$1,068.83), Recurring (\$35.00), Materials (\$0.00), and Job Costing. The main form area is titled 'Work Order Entry' and includes a 'Job Information' section with fields for Job Number, Job Type, Description, Tag Group, Branch, HoldBack %, Install Company, and Installer. It also has fields for Created date, Prevailing Wage, Project Manager, Salesperson, P.O. Number, Sold Date, Projected Start, and Projected End. A 'Permits Required' section is at the bottom left. At the bottom right, there are buttons for 'Change Customer', 'Change Site', 'Sales Reversal' (highlighted with a red box), 'Apply', and 'Create Template'. A 'Notes' text area is also present.

In WeSuite

Re-open the Estimate in WeSuite and make the necessary changes.

When you are ready to Import the Estimate go to the “Accounting” Tab and select “Start (Prepare Import)” and complete the normal Import process to Sedona Office.

The screenshot shows the 'Accounting' tab in WeSuite. The 'Start (Prepare Import)' button is highlighted with a red box. Below the button is the 'Accounting Import Log' table, which contains the following data:

User	Action Taken	Date Action Taken
Amy Bartimus	Import Reset	2/2/2023 12:42:34
Amy Bartimus	Job Inserted into Queue	2/2/2023 12:31:59

When this Job is re-imported into Sedona Office it will be a New Job with a New Job Number.