

WeSuite Import Queue

09/13/2024 6:43 pm EDT

To import a job from WeSuite open the job queue and click the WeSuite button at the top. You will be presented with a list of quotes that are available for import. Highlight the job you need and click create. You will first be asked if the job is for an existing customer/site/system, or a new customer. If you select existing you will need to search for the existing customer, if you select new you will need to provide further information for the creation of the new customer. In both cases the new job will also be created. Both the new customer, and new job can then be found as normal in Sedona.

Example from a customer's database of the WeSuite import queue. Change orders show in red and must be imported from within the job, not from this screen:

Open Job List											
Reversed < > All Job Types > All Companies > All Installers > All Project Mgrs >											
Select Job Number											
Job #	Description	Customer #	Site Name	Address	City	Created	Start Date	Type	Status	Units	Open Install
5151-1	Sidney Electric-UMH...	SIDE02	Sidney Electric	2250 Central Point ...	Lima	6/30/2014		Com Fire	Reversed	54	0.00
5177-1	OOOT Warrensville...	OOOTW18	OOOT D12 Warrensville FSHF	25609 Emory Rd	Warrensville...	6/11/2014		STS Install	Reversed	320	-73731.29
5210-1-0-2											
5243-2-0-2	Audio Amplifier										
5269-1	Elida Middle S										
5281-1	Boiler Monitor										
5371-29	Camera & IP Ad										
5390-11	Key Fobs										
5390-5	Intercom for										
5408-2	Replace Cam										
5410-2	Conduit & Pt										
5419-8	Charles River										
5419-8	Client Area C										
5435-1	Marysville Vld										
5435-2	Marysville Vld										
5468-3	Metakote Mes										
5573-1-0-2	Access Contr										
5575-4-0-2	BWB Phase 1										
5581-1	Add Camera										
5654-11	Independenc										
5654-58	Replacement										
5667-2-0-2	Panel Device										
5694-1	Electric Locks										
5736-11	PAR Phase 3										
5887-2	GA Wintzer 2										
5912-2-0-2	Camera Systr										
6016-1	Dust Collect										
6119-1	Fire alarm p										
6161-2	Add Access C										
6224-1	Camera and i										
6413-1	Add Two Rea										
6479-1	Sony Camer										
6570-1	Video Surveil										
6693-3	Equipment O										
6719-1	Labor to Inst										
6720-2	Equipment O										
6771-1	Test of STS 1										
6812-1	Add Access C										
6894-1	Serenity Unit										
6925-1	Access Contr										
6925-3	Security Syst										
6926-5-0	Deadatch Re										
6970-1	Ottawa Glas										
7038-1	Fire Detector										
7044-1	Procter & G										
7369-1	Dommon Gas										
7413-1	Erica Univer										

Project No	Project Name	Created Date	Closed Date	Salesperson	Sold To	Total Quote	Site Name	Address	City	ST
8558	C & Electric	5/17/2019	5/17/2019	Chad Sider	D & D Ingredient Distr...	637.66	D & D Ingredient Distr...	5191 N Kill Rd	Delphos	OH
8262	Challenge Electric Inc.	2/5/2019	2/11/2019	Chad Sider	P&G Manufacturing Co.	110.33	P&G Manufacturing Co.	3875 Reservoir Road	Lima	OH
8222	Westfield Group	12/3/2018	12/3/2018	Richard Conchoc	Westfield Group	3779.43	Westfield Group	100 Illinois Street, Sub...	St. Charles	IL
8192	O'Reilly Auto Parts Distributio...	4/25/2019	4/29/2019	Andrew Connerick	O'Reilly Auto Parts	6005.00	O'Reilly Auto Parts	Cornerstone Parkway	Twinsburg	OH
8169	Carder, Tim A & Theresa M	1/8/2019	1/8/2019	Dane Marsee	Carder, Tim A & There...	75.00	Carder, Tim A & There...	11194 Ridge Road	Delphos	OH
8014	Springfield City Schools	1/4/2019	1/11/2019	Chad Sider	Springfield City Schools	1248.92	Springfield City Schools	Schaefer Middle School	Springfield	OH
7964	Ohio Turnpike Commission	2/16/2019	2/26/2019	Andrew Connerick	Ohio Turnpike and Infr...	20635.10	Ohio Turnpike and Infr...	682 Prospect Street	Berea	OH
7964	Ohio Turnpike Commission	12/4/2018	12/4/2018	Andrew Connerick	Ohio Turnpike and Infr...	4016.00	Ohio Turnpike and Infr...	682 Prospect Street	Berea	OH
7960	DHL	5/6/2019	6/3/2019	Richard Conchoc	Evel Inc.	33548.67	DHL Supply Chain	DHL	Westerville	OH
7871	Kahle Electric Inc.	10/25/2018	11/14/2018	Ben Wietholler	Kahle Electric Inc.	1577.77	Wilo	765 St. Clair Avenue	Lima	OH
7871	Kahle Electric Inc.	1/21/2019	1/22/2019	Ben Wietholler	Kahle Electric Inc.	102.78	Wilo	765 St. Clair Avenue	Lima	OH
7871	Kahle Electric Inc.	1/22/2019	1/22/2019	Ben Wietholler	Kahle Electric Inc.	76.89	Wilo	765 St. Clair Avenue	Lima	OH
7799	West Ohio Community Action ...	5/1/2018	7/10/2018	Chad Sider	West Ohio Community ...	6977.11	West Ohio Community ...	540 S Central Ave.	Lima	OH
7777	OOOT District 4	8/7/2018	12/9/2018	John Kostelac	OOOT District 4	2500.00	OOOT District 4	6155 Ottenden Rd.	Hudson	OH
7763	Cincinnati State	11/14/2018	11/20/2018	Ben Wietholler	Central State University	2722.31	Cincinnati State College	3520 Central Parkway	Cincinnati	OH
7740	OOOT District 4 HQ	9/26/2018	12/5/2018	John Kostelac	OOOT District 4	8888.08	OOOT District 4	2088 S. Arlington	Akron	OH
7740	OOOT District 4 HQ	1/15/2019	1/17/2019	John Kostelac	OOOT District 4	142.88	OOOT District 4	2088 S. Arlington	Akron	OH
7717	OOOT District 6	9/20/2018	10/16/2018	John Kostelac	OOOT District 6	2160.00	OOOT District 6 Delaw...	400 E Williams St	Delaware	OH
7717	OOOT District 6	10/31/2018	11/16/2018	John Kostelac	OOOT District 6	4818.01	OOOT District 6 Delaw...	400 E Williams St	Delaware	OH
7639	OOOT District 4	4/18/2018	5/2/2018	John Kostelac	OOOT District 4	4728.20	OOOT District 4	2638 State Route 14	Deerfield	OH
7561	OOOT District 3	10/19/2018	10/31/2018	John Kostelac	OOOT District 3	5596.00	OOOT District 3	405 W. Lorain St.	Lorain	OH
7381	OOOT 7 FSHF Proposals 2017	3/9/2018	8/13/2018	John Kostelac	OOOT District 6	134039.00	Odor District 6	81 Innovation Dr	Yermia	OH
7143	Ottawa Glandorf Local Schools	8/21/2018	8/29/2018	Dane Marsee	Ottawa Glandorf Local...	1969.93	Ottawa Glandorf Local...	630 Glendale Ave	Ottawa	OH
7038	Scotts Company, The	12/14/2017	12/18/2017	John Kostelac	scotts	26730.00	Scotts Company	264 Nacatou Industrial ...	MEDWAY	NE
7038	Scotts Company, The	1/4/2018	1/4/2018	John Kostelac	scotts	26122.00	Germanstown	8999 Wissauken Rd. Wi...	Germanstown	W
7038	Scotts Company, The	1/4/2018	1/4/2018	John Kostelac	scotts	18100.00	Scotts Company, The	20605 State Rd. 19	Groveand	F
7038	Scotts Company, The	1/4/2018	1/4/2018	John Kostelac	scotts	49639.00	Shafter	742 Industrial Parkway	Shafter	CA
7038	Scotts Company, The	1/4/2018	1/5/2018	John Kostelac	scotts	27535.00	Mancopa	14419 N White & Park...	Mancopa	AZ
7038	Scotts Company, The	1/9/2018	1/9/2018	John Kostelac	scotts	25840.00	Fountain Co	3 Assembly Court	Fountain	CO
6983	Ohio Department of Develop...	6/14/2017	10/19/2017	Ben Wietholler	Ohio Department of D...	11987.21	Ohio Department of D...	1250 Vernonview Drive	Mount Vernon	OH
6926	North Ridgeville Police Depart...	10/12/2017	1/2/2018	Dane Marsee	North Ridgeville Police ...	2027.14	North Ridgeville Police ...	7307 Avon Belden Rd	North Ridgeville	OH
6741	West Ohio Community Action ...	7/31/2018	10/15/2018	Ben Wietholler	West Ohio Community ...	4333.94	West Ohio Community ...	540 S Central Ave.	Lima	OH
6688	Scotts Company, The	4/5/2019	4/5/2019	John Kostelac	Scotts Company, The	1125.00	Scotts Company, The	2085 Avalon Parkway	McDonough	G
6583	OOOT District 2	10/12/2018	10/31/2018	John Kostelac	OOOT District 2	6234.42	OOOT Craig Street Dr...	1760 N Summit St	Toledo	OH
6511	Scotts Company, The	1/19/2017	2/6/2017	John Kostelac	Scotts Company, The	2259.00	The Scott's Miracle-Gr...	42375 Remington Ave.	Temecula	CA

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Create Job Close