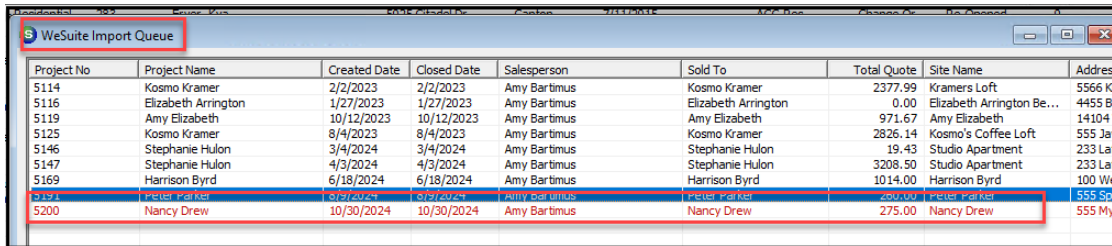# How to Add a WeSuite Change Order to a Job Imported from WeSuite

Last Modified on 11/05/2024 5:36 pm EST
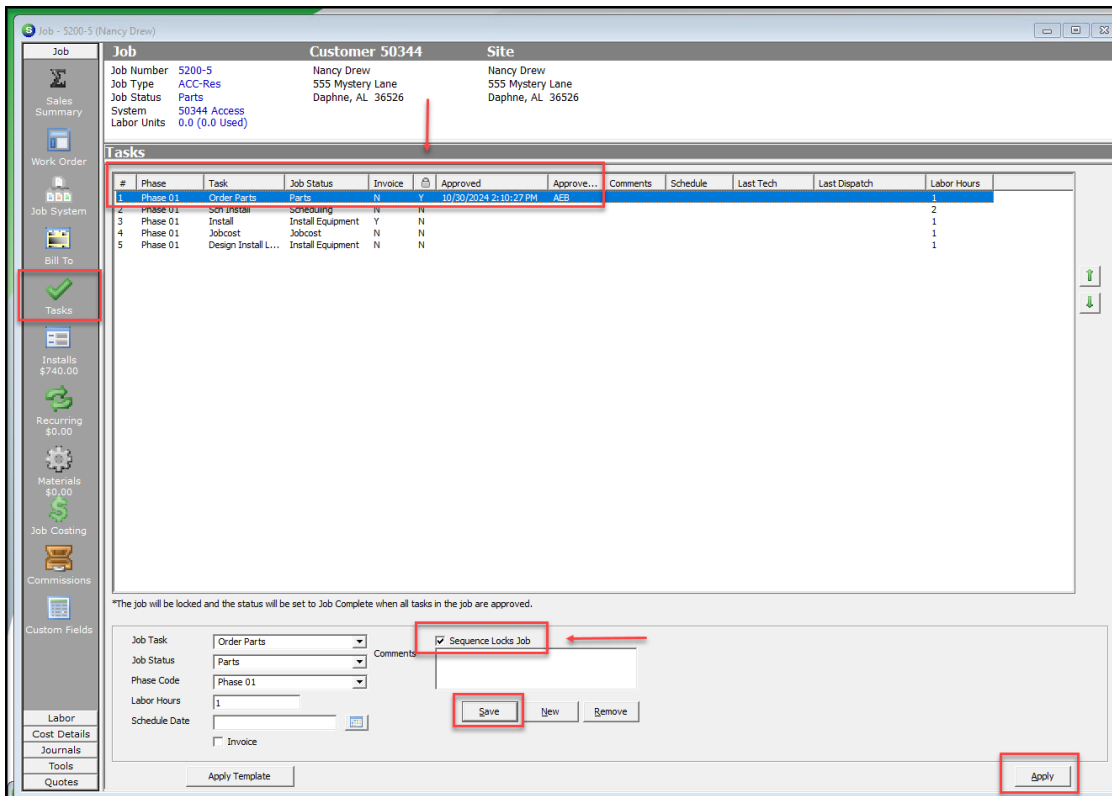
Sedona Office Job Queue

1. Create the Change Order under the correct Job in WeSuite and import into Sedona Office.
2. In Sedona Office, Open the Job Queue and click the WeSuite Icon and confirm the Change Order is listed. The Change Order will be in Red.

3. Open the Job for that Change Order either by entering the Job Number in the Job Queue or through the Customer.
4. Go to "Tasks" under the Job Tab.

   - In order to Create a Change Order in Sedona, you must have a Task that has "Sequence Locks Job" selected and then Approved.

5. If the Job does not currently have a Task that Locks the Job, you can add that option to an existing Task or add a

new Task and select "Sequence Locks Job" and then Save.

6. The Task will then need to be Approved and Apply.
7. Once the Job is Locked, go to the Tools Tab and select "Add Change Order"
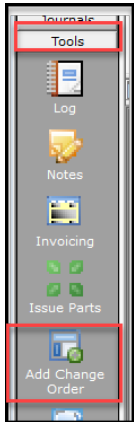
8. When the New Change Order screen opens, add a Sold Date, which is required, and any additional information that is needed.
9. Once the information is added, click the "WeSuite C/O" button.

   NOTE: Do Not click Apply until after you have selected the WeSuite Change Order.

10. The WeSuite Change Order box will open. Highlight the correct Change Order and click Select.

11. Now click on Apply in the bottom right corner.

- The Change Order screen will update and will now Show the Change Order Number in the top left.

12. Select the correct option for the type of Change Order – Installs, Recurring, Materials, Commission.

- The information in that Change Order should now be shown in that section.

- The Sales Summary should now be updated with the information from the Change Order.
- The Change Order will be listed on the Side Tool Bar.