

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

Last Modified on 05/29/2026 10:25 am EDT

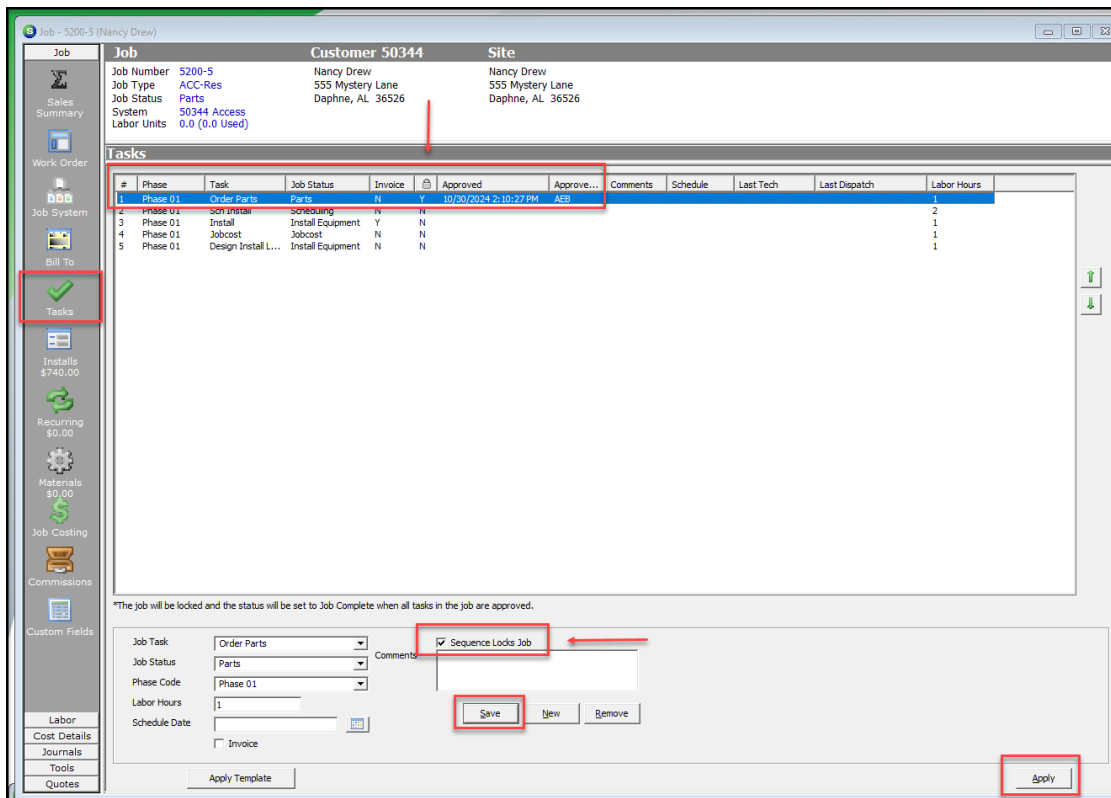
*** A Change Order cannot include both a Positive and a Negative Change because the information will not import correctly. The Change Order must either be Negative or Positive.

Sedona Office Job Queue

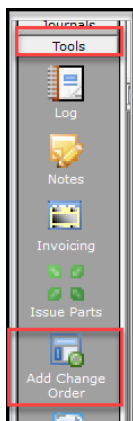
1. Create the Change Order under the correct Job in WeSuite and import into Sedona Office.
2. In Sedona Office, Open the Job Queue and click the WeSuite Icon and confirm the Change Order is listed. The Change Order will be in Red.

Project No	Project Name	Created Date	Closed Date	Salesperson	Sold To	Total Quote	Site Name	Address
5114	Kosmo Kramer	2/2/2023	2/2/2023	Amy Bartmus	Kosmo Kramer	2377.99	Kramers Loft	5566 K
5116	Elizabeth Arrington	1/27/2023	1/27/2023	Amy Bartmus	Elizabeth Arrington	0.00	Elizabeth Arrington Be...	4455 B
5119	Amy Elizabeth	10/12/2023	10/12/2023	Amy Bartmus	Amy Elizabeth	971.67	Amy Elizabeth	14104
5125	Kosmo Kramer	8/4/2023	8/4/2023	Amy Bartmus	Kosmo Kramer	2826.14	Kosmo's Coffee Loft	555 Ja
5146	Stephanie Hulon	3/4/2024	3/4/2024	Amy Bartmus	Stephanie Hulon	19.43	Studio Apartment	233 La
5147	Stephanie Hulon	4/3/2024	4/3/2024	Amy Bartmus	Stephanie Hulon	3208.50	Studio Apartment	233 La
5169	Harrison Byrd	6/18/2024	6/18/2024	Amy Bartmus	Harrison Byrd	1014.00	Harrison Byrd	100 Wh
5191	Peter Zinner	10/17/2024	10/17/2024	Amy Bartmus	Peter Zinner	2000.00	Peter Zinner	555 B
5200	Nancy Drew	10/30/2024	10/30/2024	Amy Bartmus	Nancy Drew	275.00	Nancy Drew	555 My

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.

Job - 5200-5 (Nancy Drew)

Job	Customer 50344	Site
Job Number 5200-5	Nancy Drew	Nancy Drew
Job Type ACC-Res	555 Mystery Lane	555 Mystery Lane
Job Status Scheduling	Daphne, AL 36526	Daphne, AL 36526
System 50344 Access		
Labor Units 0.0 (0.0 Used)		

New Change Order

Customer 50344 Manual Reversal

Job Information

Job Number 5200-5 - 1 Prevailing Wage

Job Type ACC-Res Project Manager

Description Testing Other Costing5 Salesperson Amy Bartimus

Tax Group NC - State Tax P.O. Number

Branch Alabama Sold Date 10/30/2024

HoldBack % Projected Start

Install Company MI Projected End

Installer

Permits Required

Permit 1

Permit 2

Permit 3

Notes

WeSuite C/O Apply

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

Sold Date 10/30/2024

Wesuite Change Order Import

Estimate Bin 5200

Job 5

AltNum	Project Desc	Create Date	Name	Amount
1	Nancy Drew	10/30/2024	Amy Bartimus	275.00

Select Cancel

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.

Change Order 5200-5 - 1

Customer: 50344 Manual Reversal

Job Information

Job Number: 5200-5 - 1 Prevailing Wage: 0.00

Job Type: ACC-Res Project Manager: [Dropdown]

Description: Testing Other Costing5 Salesperson: Amy Bartimus

Tax Group: NC - State Tax P.O. Number: [Text]

Branch: Alabama Sold Date: 10/30/2024

HoldBack %: 0 Projected Start: [Text]

Install Company: MI Projected End: [Text]

Installer: [Dropdown]

Permits Required

Permit 1: [Text]

Permit 2: [Text]

Permit 3: [Text]

Notes: [Text Area]

Sales Reversal Apply

Installs Recurring Materials Commissions

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.

Job	Customer	Site
Job Number: 5200-5	Nancy Drew	Nancy Drew
Job Type: ACC-Res	555 Mystery Lane	555 Mystery Lane
Job Status: Scheduling	Daphne, AL 36526	Daphne, AL 36526
System: 50344 Access		
Labor Units: 0.0 (0.0 Used)		

CO 5200-5 - 1 - Installs										
Item	Description	Phase	QTY	Unit Price	Extended Price	Tax	Exempt	Units	Cost Type	Cost
*Equipment Rental	*Equipment Rental	Phase 01	1	275.00	275.00	0.00		0	ER	275.00

- 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.

- Job
- Sales Summary
- Work Order
- Job System
- Bill To
- Tasks
- Installs \$740.00
- Recurring \$0.00
- Materials \$0.00
- Job Costing
- Commissions
- Custom Fields

Job	Customer 50344	Site
Job Number 5200-5	Nancy Drew	Nancy Drew
Job Type ACC-Res	555 Mystery Lane	555 Mystery Lane
Job Status Scheduling	Daphne, AL 36526	Daphne, AL 36526
System 50344 Access		
Labor Units 0.0 (0.0 Used)		

Sales Summary

Installs	Item Code	Description	Quantity	Amount
Other Invoic	WoSuite	Other Invoic--WoSuite Item	1	740.00
	*Equipment Rental	*Equipment Rental	1	275.00
	Total			\$1,015.00

Parts	Part Code	Description	Quantity	Amount
	AX100S	AX100S SURFACE MOUNT MOTION ...	1	0.00
	Total			\$0.00
	Total Non Recurring			\$1,015.00
	Total Non Recurring Billed			\$0.00
	Total Credits			\$0.00
	Balance to Bill			\$1,015.00

Recurring	Item Code	Description	Monthly Amt
	Total Recurring		\$0.00
	Total Recurring Billed		\$0.00

- CO 5200-5 - 1
- Labor
- Cost Details
- Journals
- Tools
- Quotes

