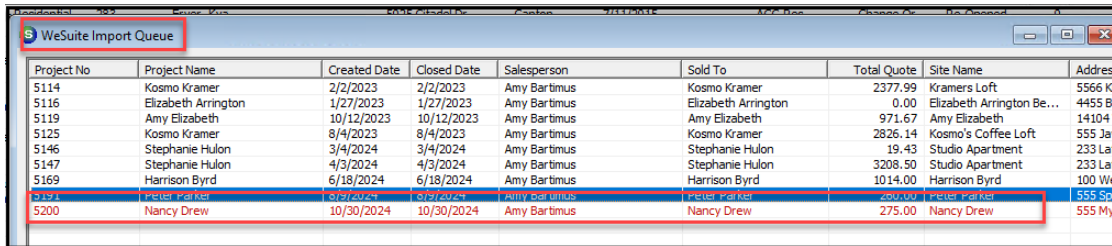


How to Add a WeSuite Change Order to a Job Imported from WeSuite

Last Modified on 11/05/2024 5:36 pm EST

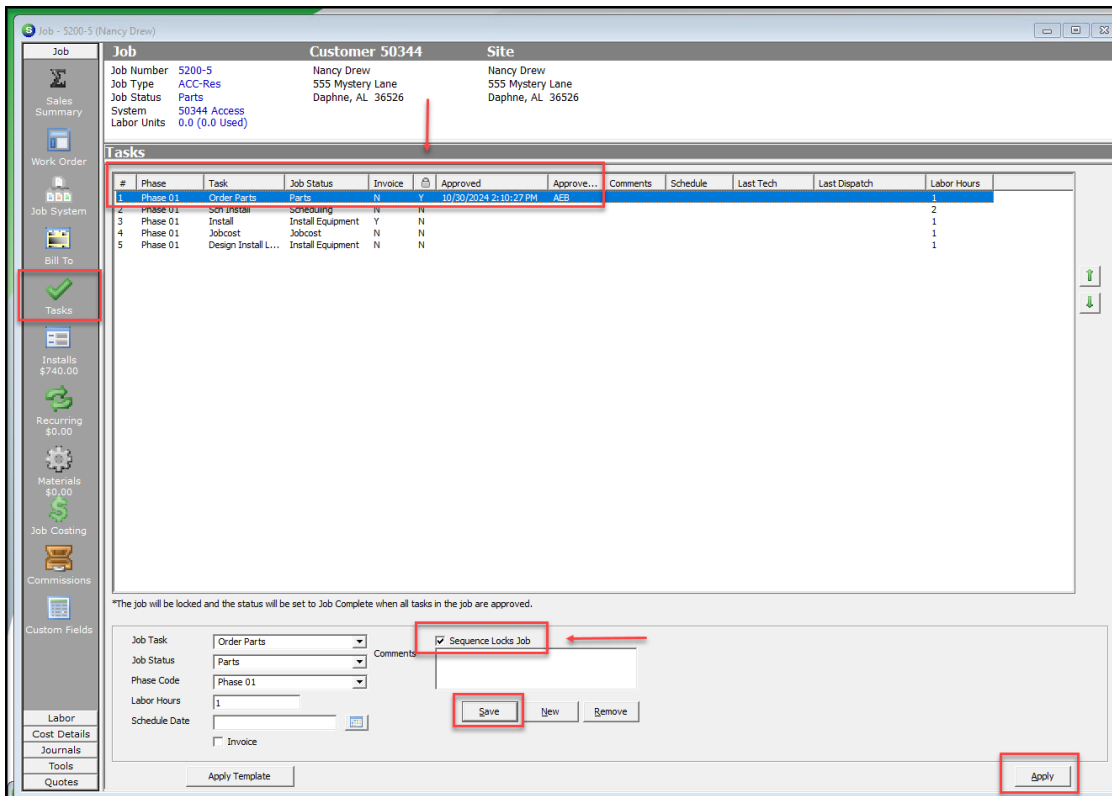
Sedona Office Job Queue

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.



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 Bartimus	Kosmo Kramer	2377.99	Kramers Loft	5566 K
5116	Elizabeth Arrington	1/27/2023	1/27/2023	Amy Bartimus	Elizabeth Arrington	0.00	Elizabeth Arrington Be...	4455 B
5119	Amy Elizabeth	10/12/2023	10/12/2023	Amy Bartimus	Amy Elizabeth	971.67	Amy Elizabeth	14104 A
5125	Kosmo Kramer	8/4/2023	8/4/2023	Amy Bartimus	Kosmo Kramer	2826.14	Kosmo's Coffee Loft	555 Ja
5146	Stephanie Hulon	3/4/2024	3/4/2024	Amy Bartimus	Stephanie Hulon	19.43	Studio Apartment	233 La
5147	Stephanie Hulon	4/3/2024	4/3/2024	Amy Bartimus	Stephanie Hulon	3208.50	Studio Apartment	233 La
5169	Harrison Byrd	6/18/2024	6/18/2024	Amy Bartimus	Harrison Byrd	1014.00	Harrison Byrd	100 We
5194	Meter Markel	8/19/2024	8/19/2024	Amy Bartimus	Meter Markel	200.00	Meter Markel	555 Sp
5200	Nancy Drew	10/30/2024	10/30/2024	Amy Bartimus	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.



Job - 5200-5 (Nancy Drew)

Job Number: 5200-5, Job Type: ACC-Res, Job Status: Parts, System: 50344 Access, Labor Units: 0.0 (0.0 Used)

Customer: 50344, Nancy Drew, 555 Mystery Lane, Daphne, AL 36526

Site: Nancy Drew, 555 Mystery Lane, Daphne, AL 36526

#	Phase	Task	Job Status	Invoice	Approved	Approve...	Comments	Schedule	Last Tech	Last Dispatch	Labor Hours
1	Phase 01	Order Parts	Parts	N	Y	10/30/2024 2:10:27 PM	AEB				1
2	Phase 01	Sort Install	Scheduling	N	N						2
3	Phase 01	Install	Install Equipment	Y	N						1
4	Phase 01	Jobcost	Jobcost	N	N						1
5	Phase 01	Design Install L...	Install Equipment	N	N						1

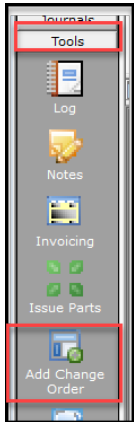
Job Task: Order Parts, Job Status: Parts, Phase Code: Phase 01, Labor Hours: 1, Schedule Date: [calendar icon]

Sequence Locks Job

Buttons: Save, New, Remove, Apply Template, Apply

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.
- The Task will then need to be Approved and Apply.
 - Once the Job is Locked, go to the Tools Tab and select “Add Change Order”



- When the New Change Order screen opens, add a Sold Date, which is required, and any additional information that is needed.
- 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	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	<input type="checkbox"/> 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: []	Notes: []
<input type="checkbox"/> Permits Required	
Permit 1: []	
Permit 2: []	
Permit 3: []	

Buttons: **WeSuite C/O** (highlighted), **Apply**

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

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

Job Information

Job Number: 5200-5 - 1
Job Type: ACC-Res
Description: Testing Other Costing5
Tax Group: NC - State Tax
Branch: Alabama
Holdback %: 0
Install Company: MI
Installer: [Dropdown]

Prevailing Wage: 0.00
Project Manager: [Dropdown]
Salesperson: Amy Bartimus
P.O. Number: [Text]
Sold Date: 10/30/2024
Projected Start: [Text]
Projected End: [Text]

Permits Required: [Checkboxes]
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 50344 Site

Job Number: 5200-5
Job Type: ACC-Res
Job Status: Scheduling
System: 50344 Access
Labor Units: 0.0 (0.0 Used)

Nancy Drew
555 Mystery Lane
Daphne, AL 36526

Nancy Drew
555 Mystery Lane
Daphne, AL 36526

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 - 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)		

Sales Summary

Installs			
Item Code	Description	Quantity	Amount
**Other Invoice - WaSuite	Other Invoice - WaSuite 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