

WeSuite – Estimate with more than One Folder not importing Part Quantities Correctly for Purchase Orders

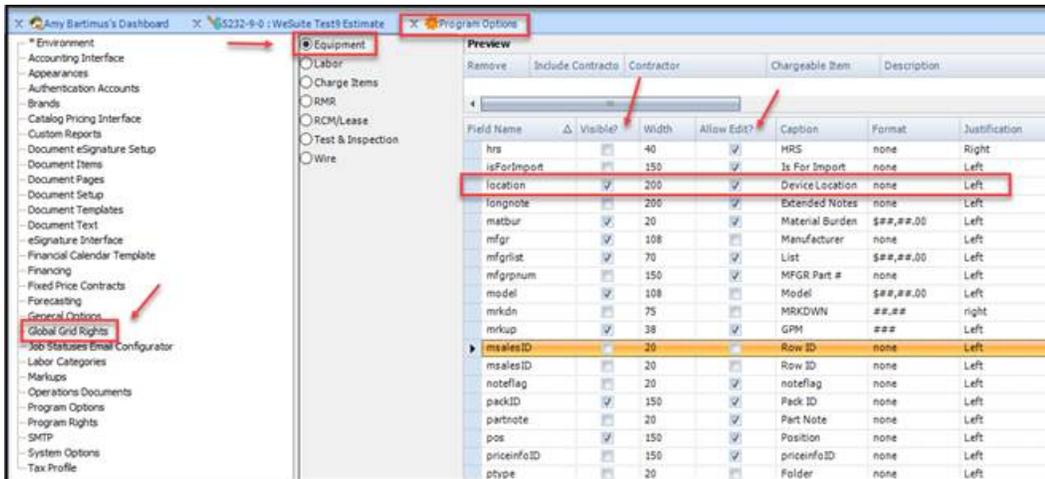
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WeSuite

When adding the same Part to multiple Folders within an Estimate in WeSuite, in order to have that Part(s) show the correct Quantities when imported into Sedona and also on a PO for the Job, you will need to use the "Device Location" field in the Estimate.

If you do not have the Device Location Field available in the Estimate, someone with Admin Permissions will need to add that option.

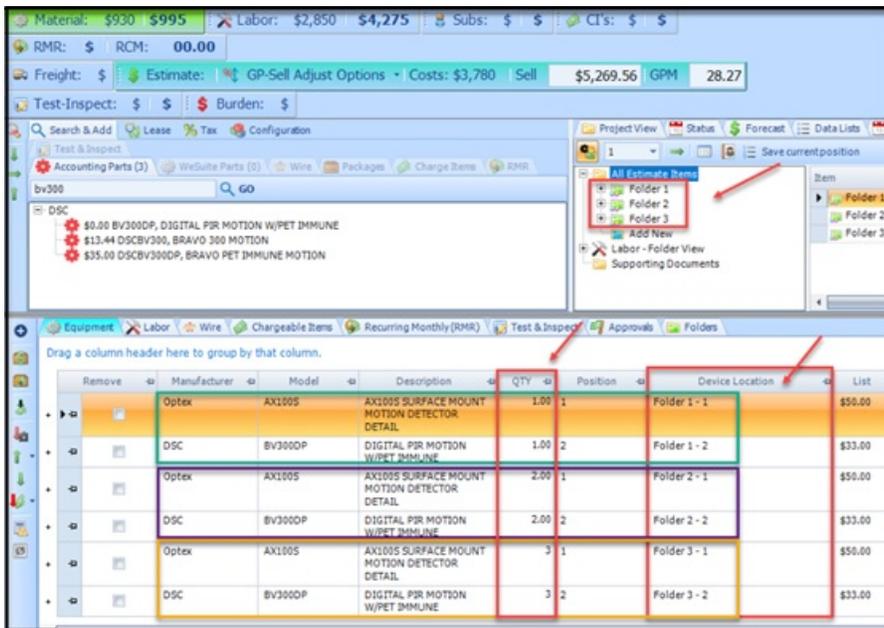
In WeSuite, select Tools - Program Options - Global Grid Rights - Equipment. Select the "Visible" box for "location" and "Allow Edit."



Within the Estimate, you can use a single Number, Letter, or any combination of both for the Device Location.

In the Example below, I have three Folders within this Estimate.

In each of the Folders I have added the same two Parts but using different Quantities for each and entered the Folder Number in the Device Location Field.



Folder 1

- AX100S – Qty of 1 & Device Location: Folder 1 – 1
- BV300DP – Qty of 1 & Device Location: Folder 1 – 2

Folder 2

- AX100S – Qty of 2 & Device Location: Folder 2 – 1
- BV300DP – Qty of 2 & Device Location: Folder 2 – 2

Folder 3

- AX100S – Qty of 3 & Device Location: Folder 3 – 1
- BV300DP – Qty of 3 & Device Location: Folder 3 – 2

SedonaOffice

When the Job is imported into SedonaOffice the Sales Summary shows the correct Part Quantities.

Job		Customer 48800	Site
Job Number	5232-9	Amy Bartimus	Amy - Lake House
Job Type	ACC-Res	Amy Bill To- Site A	15870 H Haggerty
Job Status	Parts	1234 Hello Hwy	Unit 213
New System	Access	Daphne, AL 36526	Plymouth, MI 48170
Labor Units	0.0 (0.0 Used)		(734) 563-7344
Sales Summary			
Installs			
Item Code	Description	Quantity	Amount
*Labor Install - WeSuite	*Labor Install - WeSuite	57	4275.00
Total			\$4,275.00
Parts			
Part Code	Description	Quantity	Amount
AX100S	AX100S SURFACE MOUNT MOTION ...	6	0.00
BV300DP	DIGITAL PIR MOTION W/PET IMMUNE	6	0.00
Total			\$0.00
Total Non Recurring			\$4,275.00
Total Non Recurring Billed			\$0.00
Total Credits			\$0.00
Balance to Bill			\$4,275.00
Recurring			
Item Code	Description	Monthly Amt	
Total Recurring			\$0.00
Total Recurring Billed			\$0.00

The Materials Tab lists each Part contained within each of the Estimate Folders with the Correct Qty and also shows the Device Location.

WeSuite - WeSuite Test9

Job Job Number: 5232-9 Customer: 48800 Site: Amy - Lake House
 Job Type: ACC-Res Amy Bill To- Site A 15870 N Haggerty
 Job Status: Parts 1234 Hello Hwy Unit 213
 New System: Access Daphne, AL 36526 Plymouth, MI 48170
 Labor Units: 0.0 (0.0 Used) (734) 563-7344

Materials

Show Phases Warehouse: *Main-MI

Part	Description	Vendor	Qty	On Hand	Location	Local Zone	Unit Price	Ext Price	Tax	Exempt
AX1005	AX 1005 SURFAC	DMP	1	104	Folder 1 - 1		0.00	0.00	0.00	<input type="checkbox"/>
BV300DP	DIGITAL PIR MO	ATL	1	98	Folder 1 - 2		0.00	0.00	0.00	<input type="checkbox"/>
AX1005	AX 1005 SURFAC	DMP	2	104	Folder 2 - 1		0.00	0.00	0.00	<input type="checkbox"/>
BV300DP	DIGITAL PIR MO	ATL	2	98	Folder 2 - 2		0.00	0.00	0.00	<input type="checkbox"/>
AX1005	AX 1005 SURFAC	DMP	3	104	Folder 3 - 1		0.00	0.00	0.00	<input type="checkbox"/>
BV300DP	DIGITAL PIR MO	ATL	3	98	Folder 3 - 2		0.00	0.00	0.00	<input type="checkbox"/>

Installs \$4,275.00

When I select to Create the PO from within the Job, the Parts are listed according to each Estimate Folder and with the correct Qty.

Purchase Order 5198

Vendor: DMP Category: Job Res

Purchase Order

PO Number: 5198 Branch: *Main-MI Warehouse: *Main-MI
 Tracking #: Order Date: 8/2/2025 Acknowledged
 Ship Date: Ship Method:
 Parts Due Date: Job Number: 5232-9 Job Phase Code: Phase 01
 Ship To: Sedona Security 1 Main Street Chicago, IL 60614

Parts: 450.00 Expense: 0.00 Documents **No Special Order Parts Allowed** Select from All Parts

Part	Description	Vendor Part	Vendor Desc	Plg Qty	Quantity	Cost	Amount	Rend	SM Cost	BD
AX1005	AX 1005 SURFACE MOL	AX1005	AX1005	1	1	75.00	75.00	0	75.0000	<input type="checkbox"/>
AX1005	AX 1005 SURFACE MOL	AX1005	AX1005	1	2	75.00	150.00	0	75.0000	<input type="checkbox"/>
AX1005	AX 1005 SURFACE MOL	AX1005	AX1005	1	3	75.00	225.00	0	75.0000	<input type="checkbox"/>

Part # Job #: 5232-9 Phase: Phase 01 Created By: AEB 8/2/2025 9:36:57 AM Edited By: AEB 8/2/2025 9:36:57 AM

Total Cost: 450.00 Received Cost: 0.00

OK Cancel

C: New Purchase Order

Vendor: Category:

Purchase Order

ATL, Inc.
P.O. Box 828928
Philadelphia, Pennsylvania 19182
Phone:
Fax:

PO Number: Branch: Warehouse:

Tracking #: Order Date: Acknowledged

Ship To: Sedona Security
11666 44th St
Chicago, IL 60614

Ship Date: Ship Method:

Parts Due Date: Job Number: Job Phase Code:

Any - Late hour Select from All Parts

No Special Order Parts Allowed

Parts | Expenses | Documents

Part	Description	Vendor Part	Vendor Desc	Plg Qty	Quantity	Cost	Amount	Rcvd	Std Cost	BO
8V3000P	DIGITAL PFR MOTION 1	DSC-8V3000P	DIGITAL PFR MOTION 1	1	1	80.00	80.00		0.0000	<input type="checkbox"/>
8V3000P	DIGITAL PFR MOTION 1	DSC-8V3000P	DIGITAL PFR MOTION 1	1	2	80.00	160.00		0.0000	<input type="checkbox"/>
8V3000P	DIGITAL PFR MOTION 1	DSC-8V3000P	DIGITAL PFR MOTION 1	1	3	80.00	240.00		0.0000	<input type="checkbox"/>
*										<input type="checkbox"/>

Memor: ATL vendor PO Memo data.
Job #: 3232-9 Phase: Phase 01

Total Cost:
Received Cost: