

Create the Change Order in WeSuite and import into Sedona.

In Sedona, 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
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
5191	Peter Parker	9/3/2024	9/3/2024	Amy Bartimus	Peter Parker	200.00	Peter Parker	555 Sp
5200	Nancy Drew	10/30/2024	10/30/2024	Amy Bartimus	Nancy Drew	275.00	Nancy Drew	555 My

Open the Job for that Change Order in Sedona either by entering the Job Number in the Job Queue or through the Customer.

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: 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	Scr 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

*The job will be locked and the status will be set to Job Complete when all tasks in the job are approved.

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

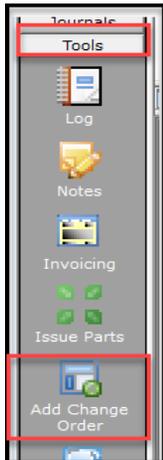
Sequence Locks Job

Buttons: Save, New, Remove, Apply

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.

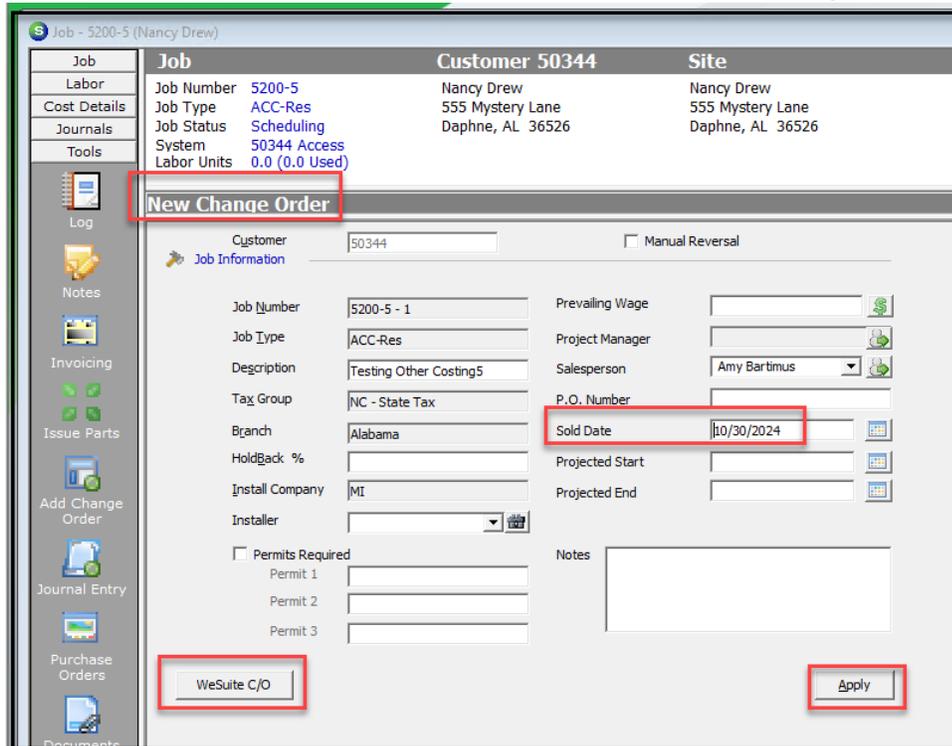
Once the Job is Locked, go to the Tools Tab and select “Add Change Order”



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.

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



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

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

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

Job Type: ACC-Res

Description: Testing Other Costing5

Tax Group: NC - State Tax

Branch: Alabama

HoldBack %: 0

Install Company: MI

Installer: [dropdown]

Permits Required:

Permit 1: [text box]

Permit 2: [text box]

Permit 3: [text box]

Notes: [text area]

Prevailing Wage: 0.00

Project Manager: [dropdown]

Salesperson: Amy Bartimus

P.O. Number: [text box]

Sold Date: 10/30/2024

Projected Start: [calendar icon]

Projected End: [calendar icon]

Sales Reversal: [button] Apply: [button]

Installs: [button] Recurring: [button] Materials: [button] Commissions: [button]

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.

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)		

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 - WeSuits	Other Invoice - WeSuits 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

Side Tool Bar:

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