

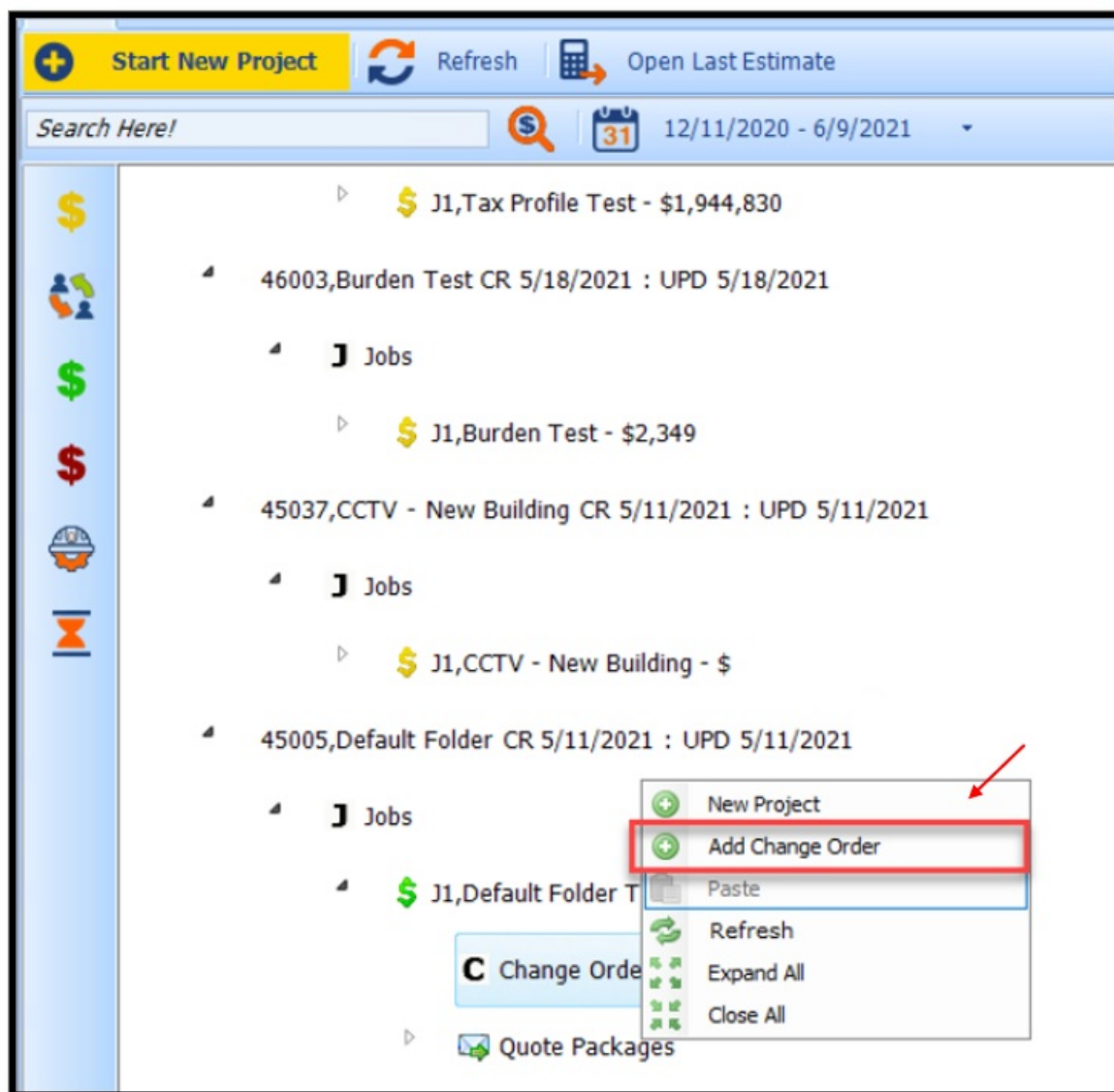
For Internal Testing - Creating Change Orders in WeSuite

07/03/2024 8:59 am EDT

This article is meant to assist internal support reps testing in wesuite. Customers should instead review WeSuite's support documentation.

Once a Job has been imported from WeSuite and created in Sedona, you have the ability to create a Change Order within WeSuite.

In WeSuite, locate the "Won" Job under Proposals and Right-click on it. Select "Add Change Order"



The "Adding a Change Order" screen will open. Some information will auto-populate from the Customer base job but some required fields will need to be completed.

Select "Continue" when finished.
The Job Window will open to create the New Quote.

Adding a Change Order

Step 1: Bin-Estimate Information

Project Name
45005,Default Folder CR 5/11/2021

Job name

Where are you Quoting? (Rates)
South East

What Office are you Quoting from?
Miami Office

Market

Job Type (Requires Override)

System Type

Type of Sale

Project Eng

Pricing Contract (Right Click to Reset)

Step 2: Customer Information

Glenn's Gardens

Go! New

Use Default Customer Quote Directly to Contractor

Customers (1)
Glenn's Gardens (10234)
Sites
Glenn's Gardens : 17 Summit Avenue
Glenn's Gardens : 200 Summit Street
Billing
Default : 200 Summit Street
Glenn's Gardens : 17 Summit Avenue

Using Existing Customer

* Customer: Glenn's Gardens

* Site: 200 Summit Street,White Plains,NY 10603

* Billing: 200 Summit Street,White Plains,NY 10603

Contact: Glenn Alberts-Glenn's Gardens

Step 3: Finishing Up

Quick Quote

Go To:
Estimate

Cancel **Continue**

*Required to Continue

Once the Change Order is completed, continue with the Accounting, and import process.