

How to use Change Orders in Sedona-X Mobile

02/08/2024 5:45 pm EST

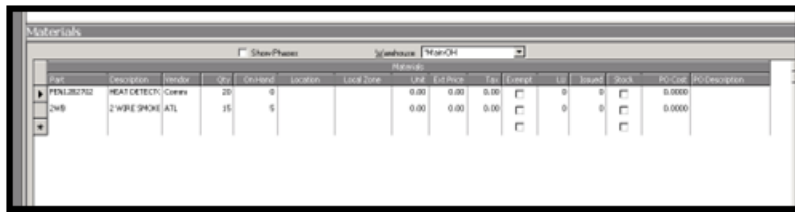
At the time this document was written; the steps below will be for SedonaX version 1.6.9 and SedonaOffice version 6.2.0.14.

Overview

When techs are on a job, sometimes the need arises to either add an additional part needed for the job or see a change order applied to the job. The steps below will show how to add additional parts or see a Change Order that has been added to the job. SedonaX does not add new Change Orders, just adds the parts to the job as Materials.

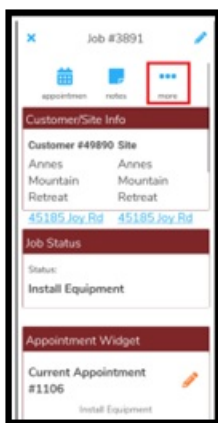
Steps:

Adding additional equipment to the job via SedonaX: Job showing parts prior to tech on site:



Part	Description	Vendor	Qty	On-hand	Location	Local Qty	Unit	Est Price	Est	Exempt	Uo	Issued	Stock	PO-Cat	PO-Description
PEN1262702	HEAT DETECTOR	Conex	20	0			0.00	0.00	0.00	<input type="checkbox"/>	0	0	<input type="checkbox"/>	0.0000	
2WB	2" WIRE SPONGE AT		15	5			0.00	0.00	0.00	<input type="checkbox"/>	0	0	<input type="checkbox"/>	0.0000	

1. In Sedona-X, click on job
2. Click **more ...**



3. Click on **materials**

□

4. Click the Plus + to add the part needed

5. Search the part to add

6. Click radio button to select the part

7. Add the Quantity of that part – Click OK

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8. New part is now added to the job via Sedona-X

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9. Open Job in SedonaOffice to see the additional parts added in the Materials Tab

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10. Click on Part Reconcile Tab and will see the added parts listed

□

11. Click on Issue Tab to add the new issue of the additional parts

Fill in the Tech Warehouse where the part came from, Phase Code, Issued Date, and any Memo needed – then Click Apply.

The parts will auto-fill that were added by the tech.

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□

12. Once new parts are issued, parts reconcile will now be balanced

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13. No Change Order needed to be added, parts were added to the job automatically. An issuance needed to be done to reconcile the parts.

Adding additional equipment to the job by Change Order via SedonaOffice:

1. In SedonaOffice – Open Job – Add a Change Order for equipment

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2. In Sedona-X – the tech will need to refresh the job, or if they freshly opened the job, should be able to see the Change Order Job Status on the job.

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3. To see the change order, should be listed in the more ... once tech clicks on option, the list will open and the tech can click on Change Order

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4. Change Order Opens – click on Materials to see the new additions

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5. If additional parts, of the same part in the change order, need to be added they can be added by clicking on the Part – Click on the Pencil to edit – Click on the Qty – Click on Save

** The Rate can also be changed if needed

□

6. However, extra parts not in the Change Order will be added outside of the Change Order and will be in the materials area and not the Change Order.

7. Open the job in SedonaOffice, the additional part will need to be issued like above. Part Reconcile will show as unbalanced.

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6. Any changes done to the Change Order will also show updated in SedonaOffice on the Job.

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