

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

05/29/2026 10:25 am EDT

*** A Change Order cannot include both a Positive and a Negative Change because the information will not import correctly. The Change Order must either be Negative or Positive.

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
5125	Kosmo Kramer	8/4/2023	8/4/2023	Amy Bartimus	Kosmo Kramer	2826.14	Kosmo's Coffee Loft	555 Jar
5146	Stephanie Hulon	3/4/2024	3/4/2024	Amy Bartimus	Stephanie Hulon	19.43	Studio Apartment	233 Lar
5147	Stephanie Hulon	4/3/2024	4/3/2024	Amy Bartimus	Stephanie Hulon	3208.50	Studio Apartment	233 Lar
5169	Harrison Byrd	6/18/2024	6/18/2024	Amy Bartimus	Harrison Byrd	1014.00	Harrison Byrd	100 We
5191	Nancy Drew	10/30/2024	10/30/2024	Amy Bartimus	Nancy Drew	275.00	Nancy Drew	555 My
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 Customer 50344 Site Nancy Drew
 Job Type ACC-Res 555 Mystery Lane
 Job Status Parts Daphne, AL 36526
 System 50344 Access
 Labor Units 0.0 (0.0 Used)

Tasks

#	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	Sch 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: ☐ Invoice

☒ Sequence Locks Job

Save New Remove

Apply Template 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"

Tools

Log

Notes

Invoicing

Issue Parts

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 - 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)		

New Change Order

Customer 50344 ☐ 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			

☐ Permits Required

Permit 1

Permit 2

Permit 3

Notes

WeSuite C/O Apply

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

Sold Date 10/30/2024

Wesuite Change Order Import

Estimate Bin 5200

Job 5

Altum	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 ☐ Manual Reversal

Job Information

Job Number	5200-5 - 1	Prevailing Wage	0.00
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 %	0	Projected Start	
Install Company	MI	Projected End	
Installer			

☐ Permits Required

Permit 1:
 Permit 2:
 Permit 3:

Notes:

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.

Nancy Drew

Job	Customer 50344	Site
Job Number: 5200-5	Nancy Drew	Nancy Drew
Job Type: ACC-Res	355 Mystery Lane	355 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	EQ	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

Sales Summary

Work Order

Job System

Bill To

Tasks

Installs
\$740.00

Recurring
\$0.00

Materials
\$0.00

Job Costing

Commissions

Custom Fields

CO 5200-5 - 1

Labor

Cost Details

Journals

Tools

Quotes

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

Sales Summary

Installs

Item Code	Description	Quantity	Amount
*Other Invoice - WoSuite	*Other Invoice - WoSuite 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