

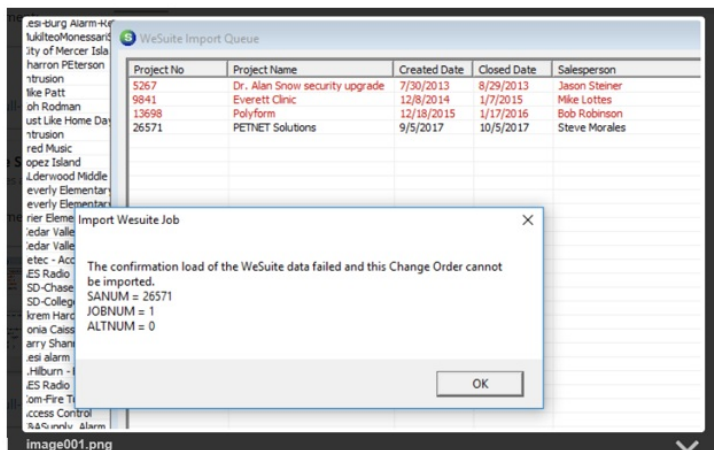
Trouble Importing Change Orders from WeSuite

09/13/2024 6:40 pm EDT

Internal -

Common problems importing change orders:

- A change order is not appearing, or it is appearing, but errors when you try to import it. - Have the customer open the job in Sedona and also open the quote in WeSuite and compare these two using the list below.
 - The job number in Sedona must match job number in WeSuite
 - The job type in Sedona must match job type in WeSuite
 - The system number in Sedona must match system number in WeSuite
 - The system type in Sedona must match system type in WeSuite
 - There cannot be both positive and negative values on the change order
 - If you use customer groups, the customer group on the customer must be the same as it was when the original job was imported
 - This means if the change order cannot be imported if the customer group on the customer was changed after the job was imported, if the customer groups feature was turned on after the job was imported, or if the user doesn't have access to the change order's customer group.
- See specific error message below. This error was received when there was no billing information on the quote in WeSuite.



- Everything above has been reviewed and the change order still won't import – as with jobs themselves, this happens from time to time. If it is a recurring issue then the ultimate cause needs to be tracked down and data support should be involved. If this is not a recurring issue then we should recommend that the customer enter the change order manually. Something about the change order has become unhooked, but they will spend more time trying to diagnose what it is then they would just manually entering the change order.