

Create a Negative Change Order

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Follow the instructions below and on the following pages to create a Manual Reversal (negative) change order. It is assumed that the Job is in lock mode prior to following the steps below. User permissions are required to be able to create and work with Job Change Orders.

A Job can be locked as a result of three situations:

- A User can force a Job to become locked by flagging a Job Task line for locking and approving the Task. If using this option, we recommend you add a Job Task Line such as Lock For Change Order for this purpose.
- The Job will become naturally locked if the Job has not been invoiced but all Job Tasks have been approved.
- The Job has become locked as a result of closing the Sales Period. **See Sales Period Close for more information.**

A Job is identified as being "locked" on the Job Work Order form.

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1. Open the Job record for which a Change Order will be created.

2. Navigate to the Tools toolbar on the Job record. Click the Add Change Order button located on the Tools toolbar.

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3. The New Change Order form will be displayed. Select the Manual Reversal checkbox at the upper right of the Change Order form. The only required field on this form is the Sold Date. This is typically the date the Change Order was authorized. The User may enter information into the Notes field that describes the purpose of the Change Order. Click the Apply button located at the lower right of the form when finished.

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4. Once the Change Order has been saved, a new Change Order button will be displayed on the Job Toolbar. This new button contains data entry forms where the User may enter negative amounts/quantities for Install Charges, RMR, Materials or Commissions. When the Job is invoiced, any negative charges entered on the Change Order will appear as lines within the Job Invoice.

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Install Charges

5. To decrease the Install Charges, click the Installs button on the Change Order toolbar. Add as many lines as needed. For each reversal Install charge line, select an item code, enter the quantity as a negative value, and if needed to reduce the estimated labor units, enter the appropriate negative value. The User may override the Item Description that defaults into the field. Click the Save button when finished with each line.

Once all Install charge lines have been entered, click the Apply button located at the lower right of the form.

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Recurring Charges

6. To decrease Recurring Charges, click the Recurring button on the Change Order toolbar. Add as many lines as needed. For each reversal Recurring charge line, select an item code and enter the RMR Amount as a negative value. The User may override the Recurring Item Description that defaults into the field. Click the Save button when finished with each line.

Once all Recurring charge lines have been entered, click the Apply button located at the lower right of the form.

▫ If the recurring charges have already been invoiced for the job, do not create a change order to reduce the charges. You will need to go to the customer record to make the necessary changes to the recurring lines.

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Material Charges and/or Quantities

7. To decrease Material Charges or quantities of parts, click the Materials button on the Change Order toolbar.

In the Change Qty column, enter the negative quantity on the appropriate part line that will be removed from the Job materials list.

Once all Part lines have been updated, click the Apply button located at the lower right of the form.

▫ Note: If the parts being removed on the Manual Reversal Change Order have already been issued to the Job, remember to perform a return to stock transaction for the part(s) not being used.

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Commissions

8. To decrease Commissions, click the Commissions button on the Change Order toolbar. Add as many additional lines as needed.

The data entry process is performed in the lower tier of the form; select the commission type from the drop-down list, enter the commissionable amount (negative value), then click the Apply button. Repeat the process for additional negative commissions.

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