



SedonaOffice
Job Change Orders

CONTENTS

- Job Change Orders Overview3**
 - Change Order Types4**
- Change Orders - Positive6**
 - Install Charges9**
 - Recurring Charges10**
 - Material Charges11**
 - Commissions12**
- Manual Reversal Change Orders - Negative13**
 - Install Charges16**
 - Recurring Charges17**
 - Material Charges and/or Quantities18**
 - Commissions19**

This document provides information related to creating and working with Job Change Orders. The information contained herein is an excerpt from the SedonaOffice Online Help.

Job Change Orders Overview

Job Change Orders are used when you need to modify Install Charges, RMR, Parts or Commissions on a Job. Step by step instructions will be provided for creating Change Orders and Manual Reversal Change Orders.

To be able to create a Change Order, the Job must be in a locked status. A Job can be locked as a result of three situations:

1. 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.
2. The Job will become naturally locked if the Job has not been invoiced but all Job Tasks have been approved.
3. The Job has become locked because 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.

The screenshot displays the 'Job - 1101 (Williams, Reggie)' interface. It features a sidebar on the left with navigation icons for Sales Summary, Work Order, Job System, Tasks, Installs (\$1,625.00), Recurring (\$58.00), and Materials (\$0.00). The main content area is divided into 'Job Information' and 'Work Order Entry'. The 'Job Information' section includes fields for Job Number (1101), Job Type (R-Intrusion), Description (Intrusion - Residential/Small Cc), Tax Group (MI-Wayne County), Branch (MI), Holdback % (0), Install Company (MI), and Installer. The 'Work Order Entry' section includes fields for Created (4/22/2015), Prevailing Wage (0.00), Project Manager, Salesperson (George.McGee), P.O. Number, Sold Date (4/20/2015), Projected Start (4/22/2015), Projected End, and Notes (Newington Electric will be prewiring job). A 'Locked' checkbox is checked and circled in blue, with a blue arrow pointing to it from the left.

Job	Customer 241	Site
Job Number 1101	Williams, Reggie	Williams, Reggie
Job Type R-Intrusion	15832 Albert	15832 Albert
Job Status Jobcost	Plymouth, MI 48170	Plymouth, MI 48170
System 241-1025 Intrusion	(734) 248-4178	(734) 248-4178
Labor Units 5 (6.75 Used)		

Work Order Entry

Job Information

Job Number: 1101
Job Type: R-Intrusion
Description: Intrusion - Residential/Small Cc
Tax Group: MI-Wayne County
Branch: MI
Holdback %: 0
Install Company: MI
Installer:
 Permits Required
Permit 1:
Permit 2:
Permit 3:
 Override Primary Task List

Created: 4/22/2015
Prevailing Wage: 0.00
Project Manager:
Salesperson: George.McGee
P.O. Number:
Sold Date: 4/20/2015
Projected Start: 4/22/2015
Projected End:
Notes: Newington Electric will be prewiring job

Locked

Apply

Change Order Types

There are two types of Change Orders that may be created. A single job may have both Change Orders and Manual Reversal Change Orders.

Note: Negative and positive amounts are not permitted on the same change order; they must be entered as separate change orders.

Change Order – Used when adding or increasing charges to the Job; Parts, Labor, Install Charges or Commissions. This is commonly referred to as a Positive Change Order.

Manual Reversal Change Order – Used when reducing or removing charges from a Job; Parts, Labor, Install Charges or Commissions. This is commonly referred to as a Negative Change Order.

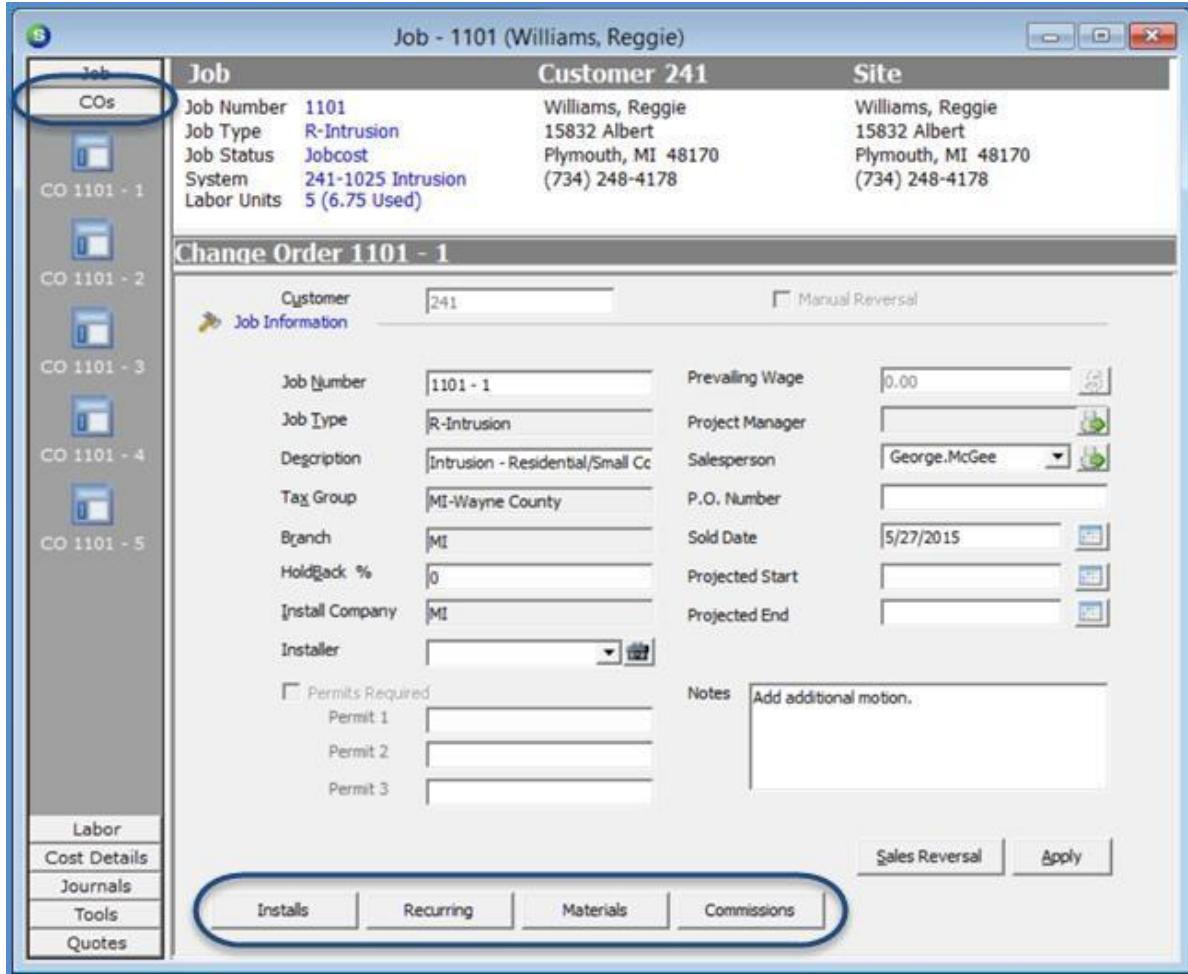
Once a Job has become locked, a new button is displayed on the Job *Tools* Toolbar; *Add Change Order*.

The screenshot displays a software interface for job management. At the top, it shows 'Job - 1101 (Williams, Reggie)'. Below this, there are sections for 'Job', 'Customer 241', and 'Site'. The 'Job' section includes Job Number 1101, Job Type R-Intrusion, Job Status Jobcost, System 241-1025 Intrusion, and Labor Units 5 (6.75 Used). The 'Customer 241' section includes Williams, Reggie, 15832 Albert, Plymouth, MI 48170, and (734) 248-4178. The 'Site' section includes Williams, Reggie, 15832 Albert, Plymouth, MI 48170, and (734) 248-4178. Below these sections is a 'Log' table with columns for Date, CO, Event, and Description. The 'Log' table contains multiple entries with dates ranging from 4/22/2015 7:22:04 AM to 4/22/2015 6:56:30 AM. On the left side of the interface, there is a toolbar with various icons. A blue arrow points to the 'Add Change Order' button, which is highlighted with a blue circle.

Date	CO	Event	Description
4/22/2015 7:22:04 AM	N	Approved Job Task	4 Phase 01
4/22/2015 7:12:37 AM	N	Issued Parts	Issued parts from Receipt
4/22/2015 7:12:35 AM	N	Purchase Order Received	Receive Parts
4/22/2015 7:12:21 AM	N	Issued Parts	Issued parts from Receipt
4/22/2015 7:12:20 AM	N	Purchase Order Received	Receive Parts
4/22/2015 7:11:04 AM	N	Deleted Commissions	George.Miller-Add On Parts
4/22/2015 7:10:54 AM	N	Added Commissions	George.Miller-Add On Parts
4/22/2015 7:10:54 AM	N	Added Commissions	George.Miller-RMR 3 Months
4/22/2015 7:10:54 AM	N	Added Commissions	George.Miller-Install
4/22/2015 7:10:26 AM	N	Deleted Commissions	George.Miller-RMR 3 Months
4/22/2015 7:10:26 AM	N	Deleted Commissions	George.Miller-Install
4/22/2015 6:57:58 AM	N	Deleted Commissions	George.Miller-Add On Parts
4/22/2015 6:57:51 AM	N	Added Commissions	George.Miller-Add On Parts
4/22/2015 6:57:51 AM	N	Added Commissions	George.Miller-RMR 3 Months
4/22/2015 6:57:51 AM	N	Added Commissions	George.Miller-Install
4/22/2015 6:57:32 AM	N	Deleted Commissions	George.Miller-RMR 3 Months
4/22/2015 6:57:32 AM	N	Deleted Commissions	George.Miller-Install
4/22/2015 6:57:12 AM	N	Deleted Commissions	George.Miller-Add On Parts
4/22/2015 6:56:42 AM	N	Added Commissions	George.Miller-Add On Parts
4/22/2015 6:56:42 AM	N	Added Commissions	George.Miller-RMR 3 Months
4/22/2015 6:56:42 AM	N	Added Commissions	George.Miller-Install
4/22/2015 6:56:40 AM	N	Deleted Commissions	George.Miller-Add On Parts
4/22/2015 6:56:40 AM	N	Deleted Commissions	George.Miller-Install
4/22/2015 6:56:30 AM	N	Added RMR	George.Miller-RMR 3 Months
4/22/2015 6:56:30 AM	N	Added RMR	George.Miller-Install

Once a Change Order has been saved, a new button will be added to the Job Toolbar for the first through the fourth change orders. If a fifth change order is created, instead of adding a new change order button to the Job Toolbar, a new button labeled COs is created for accessing all of the Change Orders created for the Job.

When clicking on the COs button, the Toolbar will display a button for each change order for the Job. To work with or view a particular change order button. When the Change Order form is displayed, at the bottom of the form, four buttons are displayed; Installs, Recurring, Materials, and Commissions; click on one of these buttons to access that element of the change order.



Change Orders - Positive

Follow the instructions below and on the following pages to create a positive value 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.

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.

The screenshot displays a software interface for job management. At the top, it shows 'Job - 1101 (Williams, Reggie)'. Below this is a summary table with columns for Job, Customer, and Site. The 'Tools' toolbar is visible on the left, with the 'Add Change Order' button circled in blue. A log table is shown below the summary, listing various events such as 'Approved Job Task', 'Issued Parts', and 'Deleted Commissions' with their respective dates and descriptions.

Job	Customer	Site
Job Number 1101	Williams, Reggie	Williams, Reggie
Job Type R-Intrusion	15832 Albert	15832 Albert
Job Status Jobcost	Plymouth, MI 48170	Plymouth, MI 48170
System 241-1025 Intrusion	(734) 248-4178	(734) 248-4178
Labor Units 5 (6.75 Used)		

Date	CO	Event	Description
4/22/2015 7:22:04 AM	N	Approved Job Task	4 Phase 01
4/22/2015 7:12:37 AM	N	Issued Parts	Issued parts from Receipt
4/22/2015 7:12:35 AM	N	Purchase Order Received	Receive Parts
4/22/2015 7:12:21 AM	N	Issued Parts	Issued parts from Receipt
4/22/2015 7:12:20 AM	N	Purchase Order Received	Receive Parts
4/22/2015 7:11:04 AM	N	Deleted Commissions	George.Miller-Add On Parts
4/22/2015 7:10:54 AM	N	Added Commissions	George.Miller-Add On Parts
4/22/2015 7:10:54 AM	N	Added Commissions	George.Miller-RMR 3 Months
4/22/2015 7:10:54 AM	N	Added Commissions	George.Miller-Install
4/22/2015 7:10:26 AM	N	Deleted Commissions	George.Miller-RMR 3 Months
4/22/2015 7:10:26 AM	N	Deleted Commissions	George.Miller-Install
4/22/2015 6:57:58 AM	N	Deleted Commissions	George.Miller-Add On Parts
4/22/2015 6:57:51 AM	N	Added Commissions	George.Miller-Add On Parts
4/22/2015 6:57:51 AM	N	Added Commissions	George.Miller-RMR 3 Months
4/22/2015 6:57:51 AM	N	Added Commissions	George.Miller-Install
4/22/2015 6:57:32 AM	N	Deleted Commissions	George.Miller-RMR 3 Months
4/22/2015 6:57:32 AM	N	Deleted Commissions	George.Miller-Install
4/22/2015 6:57:12 AM	N	Deleted Commissions	George.Miller-Add On Parts
4/22/2015 6:56:42 AM	N	Added Commissions	George.Miller-Add On Parts
4/22/2015 6:56:42 AM	N	Added Commissions	George.Miller-RMR 3 Months
4/22/2015 6:56:42 AM	N	Added Commissions	George.Miller-Install
4/22/2015 6:56:40 AM	N	Deleted Commissions	George.Miller-Add On Parts
4/22/2015 6:56:40 AM	N	Deleted Commissions	George.Miller-Install
4/22/2015 6:56:30 AM	N	Added RMR	George.Miller-Install
4/22/2015 6:56:30 AM	N	Added RMR	George.Miller-Install
4/22/2015 6:56:30 AM	N	Added RMR	George.Miller-Install

3. The *New Change Order* form will be displayed. The only required field on this form is the *Sold Date*. This is typically the date the Change Order was authorized. You may enter information into the *Notes* field that describes the purpose of the Change Order.

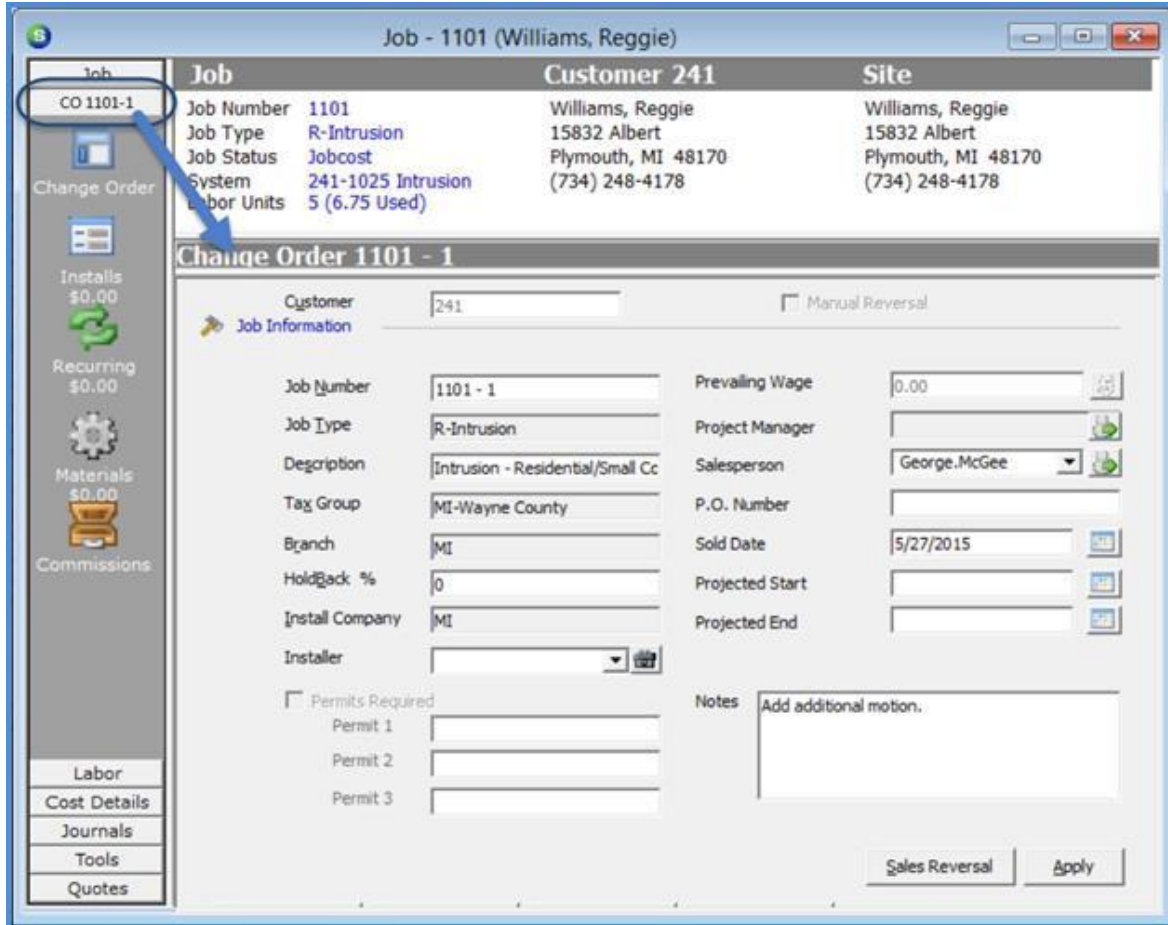
The Job Number field will automatically fill with the Job Number a hyphen then the number of the change order. In the example below, this is Change Order number 1.

Click the *Apply* button located at the lower right of the form when finished.

Job	Job	Customer 241	Site
COs	Job Number 1101	Williams, Reggie	Williams, Reggie
Labor	Job Type R-Intrusion	15832 Albert	15832 Albert
Cost Details	Job Status Jobcost	Plymouth, MI 48170	Plymouth, MI 48170
Journals	System 241-1025 Intrusion	(734) 248-4178	(734) 248-4178
Tools	Labor Units 5 (6.75 Used)		

New Change Order	
Customer	241
<input type="checkbox"/> Manual Reversal	
Job Information	
Job Number	1101 - 1
Job Type	R-Intrusion
Description	Intrusion - Residential/Small Cc
Tax Group	MI-Wayne County
Branch	MI
Holdback %	0
Install Company	MI
Installer	
<input type="checkbox"/> Permits Required	
Permit 1	
Permit 2	
Permit 3	
Prevailing Wage	0.00
Project Manager	
Salesperson	George.McGee
P.O. Number	
Sold Date	5/27/2015
Projected Start	
Projected End	
Notes	Add additional motion.
<input type="button" value="Sales Reversal"/> <input type="button" value="Apply"/>	

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 you may enter additional Install Charges, RMR, Materials or Commissions. When the Job is invoiced, any new charges entered on the Change Order will appear as lines within the Job Invoice.

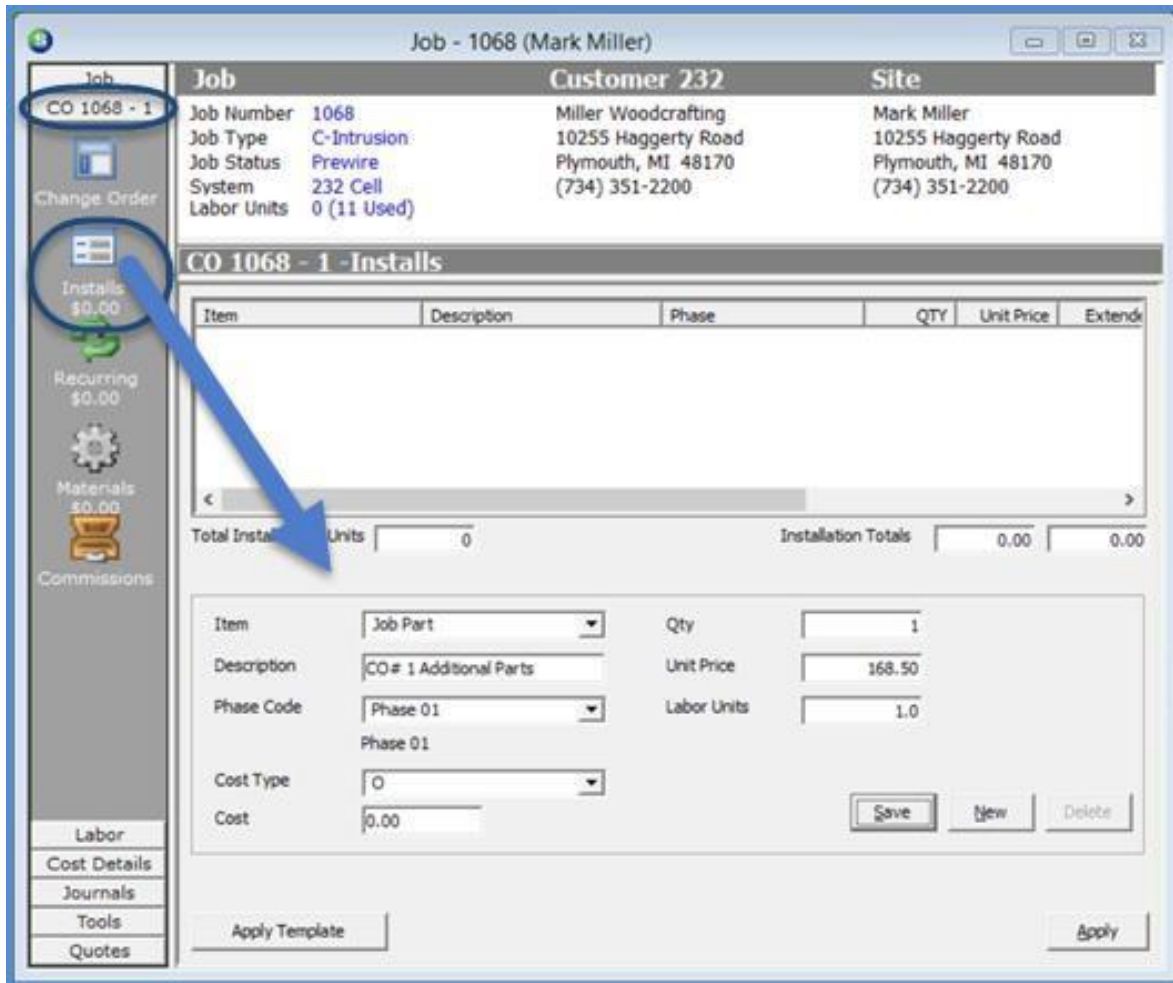


Install Charges

To enter additional Install Charges, click the *Installs* button on the Change Order toolbar. Add as many additional lines as needed.

The data entry process for change order

Install charges are the same as the initial Install charges data entry for the Job. Once all Install charge lines have been entered, click the *Apply* button located at the lower right of the form.

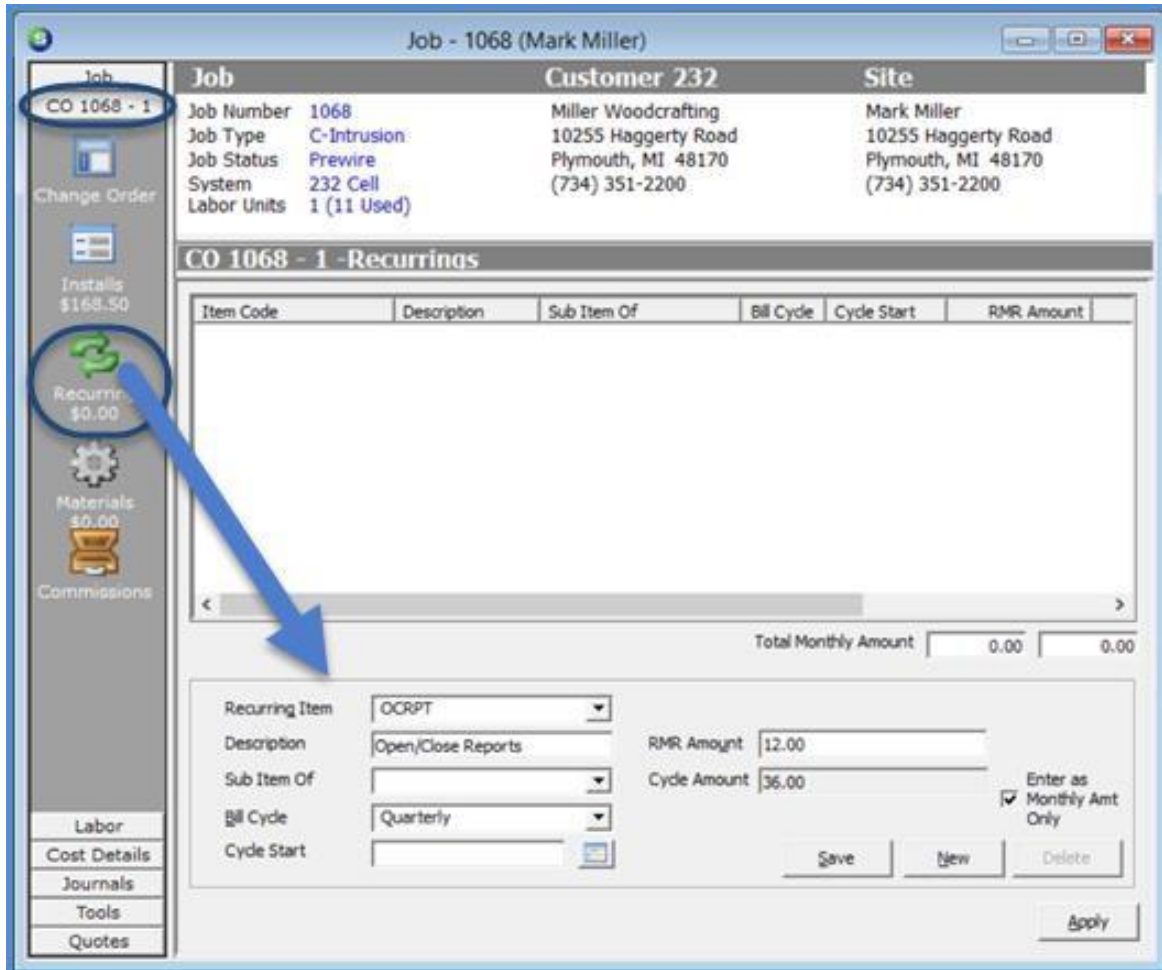


Recurring Charges

To enter additional Recurring Charges, click the Recurring button on the Change Order toolbar. Add as many additional lines as needed.

The data entry process for change order Recurring charges is the same as the initial Recurring charges data entry for the Job.

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

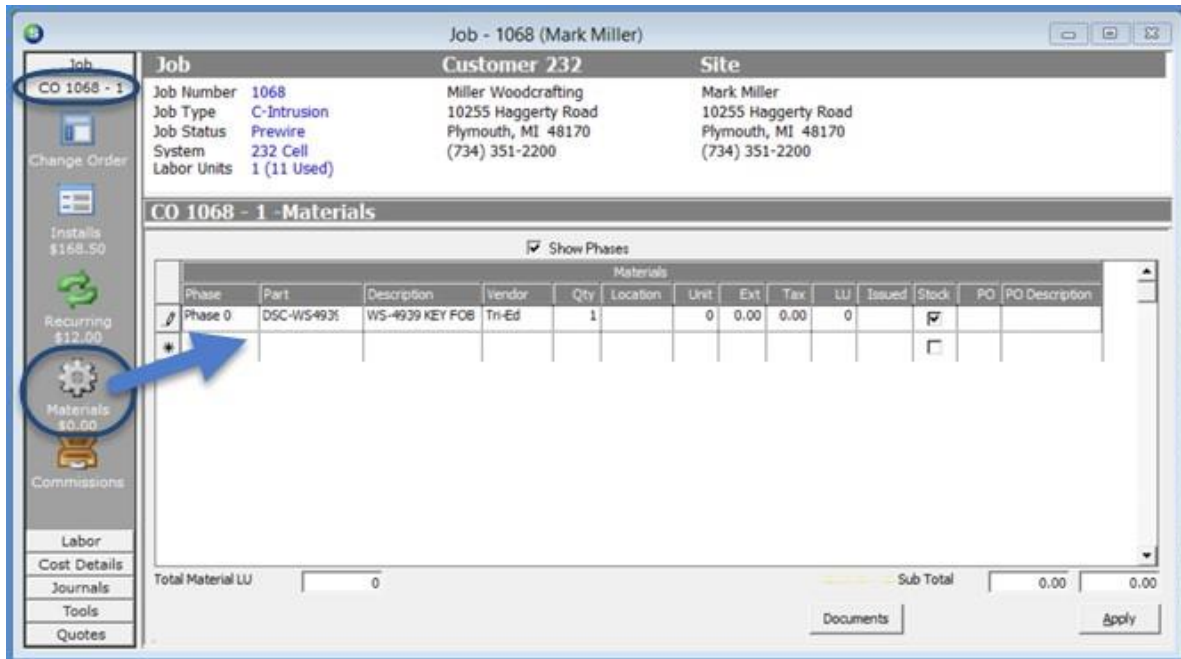


Material Charges

To enter additional Material Charges, click the Materials button on the Change Order toolbar. Add as many additional lines as needed.

The data entry process for change order Material charges is the same as the initial Material charges data entry for the Job.

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

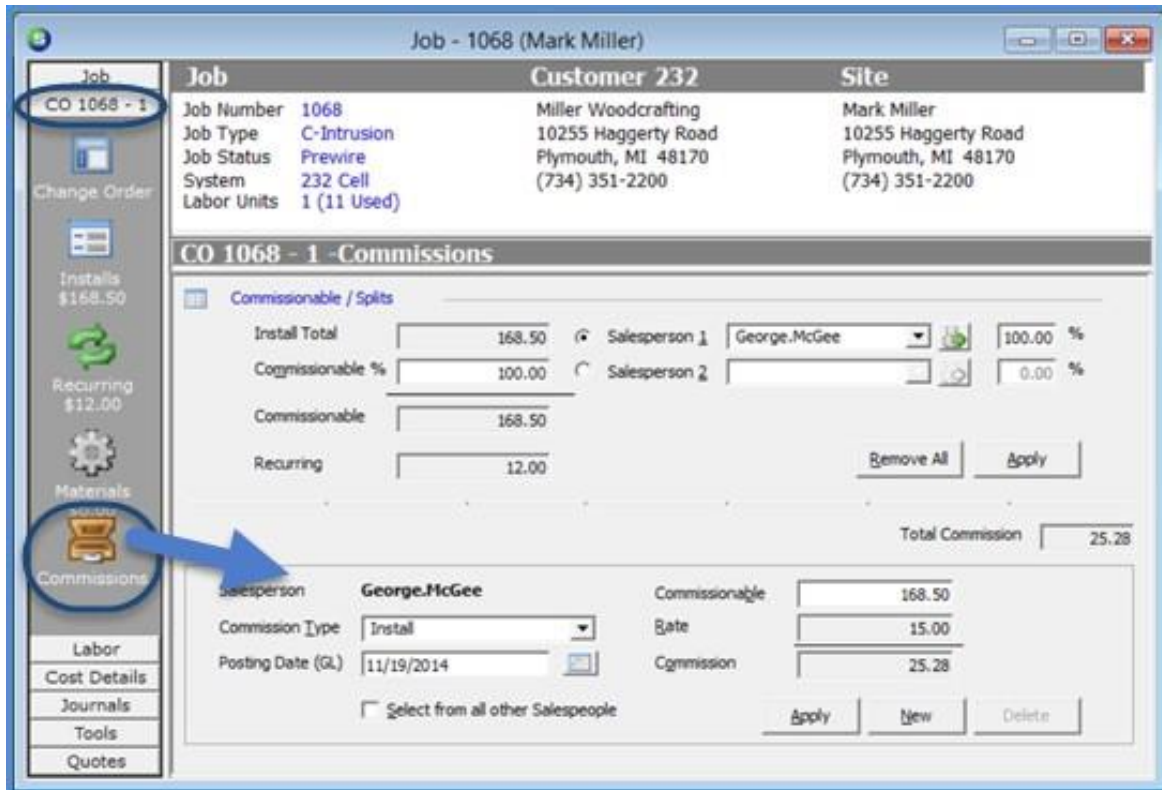


Commissions

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

The data entry process for change order Commissions is the same as the initial Commissions data entry for the Job.

Once all Commission lines have been entered, click the *Apply* button located at the center right of the form.



Manual Reversal Change Orders - Negative

Follow the instructions below and on the following pages to create a negative value 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.

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.

The screenshot displays a software interface for job management. At the top, it shows 'Job - 1101 (Williams, Reggie)'. Below this, there are sections for 'Job', 'Customer 241', and 'Site'. The 'Job' section includes Job Number 1101, Job Type R-Intrusion, Job Status Jobcost, System 241-1025 Intrusion, and Labor Units 5 (6.75 Used). The 'Customer 241' section includes Williams, Reggie, 15832 Albert, Plymouth, MI 48170, and (734) 248-4178. The 'Site' section includes Williams, Reggie, 15832 Albert, Plymouth, MI 48170, and (734) 248-4178. Below these sections is a 'Log' table with columns for Date, CO, Event, and Description. The 'Tools' toolbar is visible on the left, and the 'Add Change Order' button is highlighted with a blue circle and a blue arrow pointing to it.

Date	CO	Event	Description
4/22/2015 7:22:04 AM	N	Approved Job Task	4 Phase 01
4/22/2015 7:12:37 AM	N	Issued Parts	Issued parts from Receipt
4/22/2015 7:12:35 AM	N	Purchase Order Received	Receive Parts
4/22/2015 7:12:21 AM	N	Issued Parts	Issued parts from Receipt
4/22/2015 7:12:20 AM	N	Purchase Order Received	Receive Parts
4/22/2015 7:11:04 AM	N	Deleted Commissions	George.Miller-Add On Parts
4/22/2015 7:10:54 AM	N	Added Commissions	George.Miller-Add On Parts
4/22/2015 7:10:54 AM	N	Added Commissions	George.Miller-RMR 3 Months
4/22/2015 7:10:54 AM	N	Added Commissions	George.Miller-Install
4/22/2015 7:10:26 AM	N	Deleted Commissions	George.Miller-RMR 3 Months
4/22/2015 7:10:26 AM	N	Deleted Commissions	George.Miller-Install
4/22/2015 6:57:58 AM	N	Deleted Commissions	George.Miller-Add On Parts
4/22/2015 6:57:51 AM	N	Added Commissions	George.Miller-Add On Parts
4/22/2015 6:57:51 AM	N	Added Commissions	George.Miller-RMR 3 Months
4/22/2015 6:57:51 AM	N	Added Commissions	George.Miller-Install
4/22/2015 6:57:32 AM	N	Deleted Commissions	George.Miller-RMR 3 Months
4/22/2015 6:57:32 AM	N	Deleted Commissions	George.Miller-Install
4/22/2015 6:57:12 AM	N	Deleted Commissions	George.Miller-Add On Parts
4/22/2015 6:56:42 AM	N	Added Commissions	George.Miller-Add On Parts
4/22/2015 6:56:42 AM	N	Added Commissions	George.Miller-RMR 3 Months
4/22/2015 6:56:42 AM	N	Added Commissions	George.Miller-Install
4/22/2015 6:56:40 AM	N	Deleted Commissions	George.Miller-Add On Parts
4/22/2015 6:56:40 AM	N	Deleted Commissions	George.Miller-Install
4/22/2015 6:56:30 AM	N	Added RMR	George.Miller-RMR 3 Months
4/22/2015 6:56:30 AM	N	Added RMR	George.Miller-Install

3. The *New Change Order* form will be displayed. Select the Manual Reversal option 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.

Job - 1068 (Mark Miller)

Job	Customer 232	Site
Job Number 1068	Miller Woodcrafting	Mark Miller
Job Type C-Intrusion	10255 Haggerty Road	10255 Haggerty Road
Job Status Prewire	Plymouth, MI 48170	Plymouth, MI 48170
System 232 Cell	(734) 351-2200	(734) 351-2200
Labor Units 1 (11 Used)		

New Change Order

Customer: 232 Manual Reversal

Job Information

Job Number: 1068 - 2
 Job Type: C-Intrusion
 Description: Intrusion - Commercial
 Tax Group: MI-Wayne County
 Branch: MI
 Holdback %:
 Install Company: MI
 Installer:

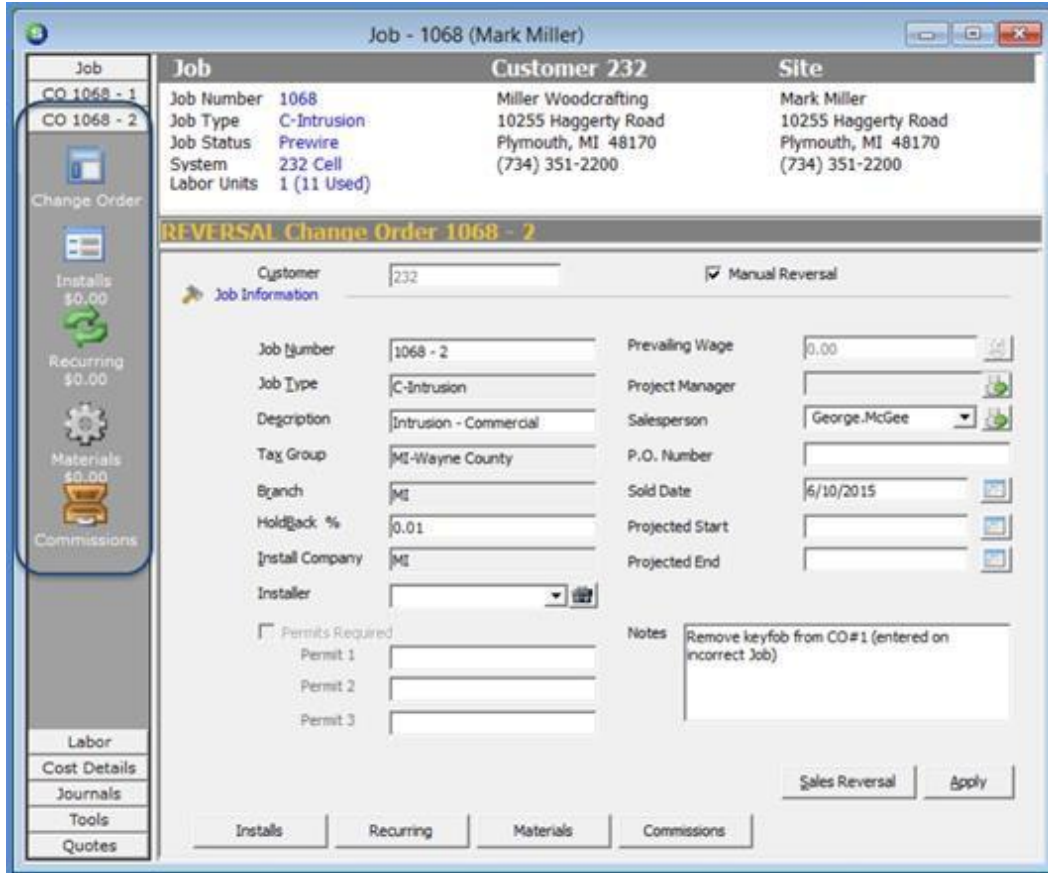
Permits Required:
 Permit 1:
 Permit 2:
 Permit 3:

Prevailing Wage:
 Project Manager:
 Salesperson: George.McGee
 P.O. Number:
 Sold Date: 6/10/2015
 Projected Start:
 Projected End:

Notes: Remove keyfob from CO#1 (entered on incorrect Job)

Apply

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 additional 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.



Install Charges

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.

The screenshot shows a software window titled "Job - 1068 (Mark Miller)". The main area displays job details for Job Number 1068, Customer 232, and Site Mark Miller. A highlighted section shows a reversal install charge line for "REVERSAL CO 1068 - 2 - Installs" with a warning "Negative quantities are expected." Below this is a table with columns for Item, Description, Phase, QTY, Unit Price, and Extended. The table is currently empty. At the bottom, there are input fields for Item (Job Part), Description (CO#2 - Job Part), Phase Code (Phase 01), Cost Type (O), and Cost (0.00). The Qty and Labor Units fields are set to -1. Buttons for Save, New, Delete, Apply Template, and Apply are visible.

Item	Description	Phase	QTY	Unit Price	Extended
------	-------------	-------	-----	------------	----------

Total Install Labor Units: 0 Installation Totals: 0.00 0.00

Item: Job Part Qty: -1
Description: CO#2 - Job Part Unit Price: 168.50
Phase Code: Phase 01 Labor Units: -1
Cost Type: O
Cost: 0.00

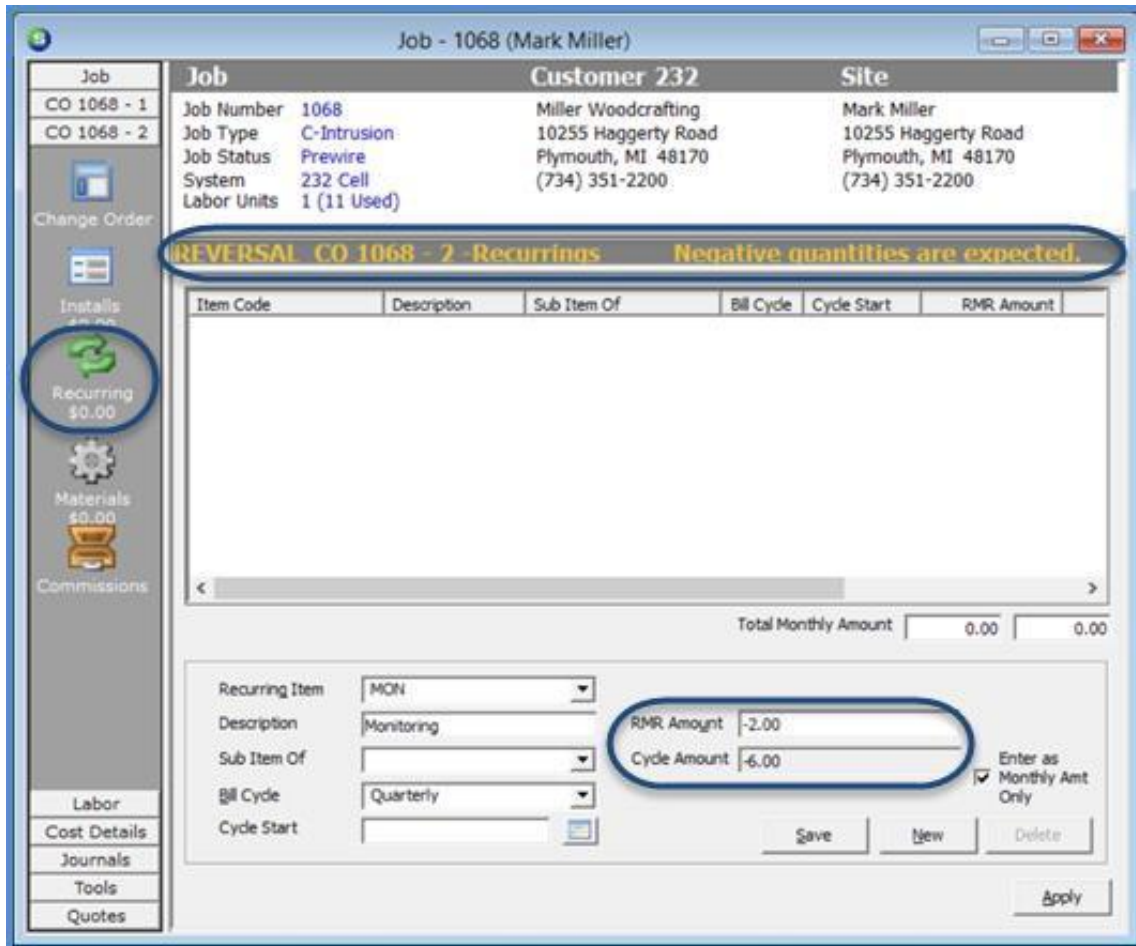
Buttons: Save, New, Delete, Apply Template, Apply

Recurring Charges

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.



Material Charges and/or Quantities

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 entered, 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.

Job - 1068 (Mark Miller)

Job: CO 1068 - 1, CO 1068 - 2

Customer: 232, Site: Mark Miller

Job Number: 1068, Job Type: C-Intrusion, Job Status: Prewire, System: 232 Cell, Labor Units: 1 (11 Used)

Customer: Miller Woodcrafting, 10255 Haggerty Road, Plymouth, MI 48170, (734) 351-2200

Site: Mark Miller, 10255 Haggerty Road, Plymouth, MI 48170, (734) 351-2200

REVERSAL CO 1068 - 2 - Materials Negative quantities are expected.

Materials Table:

Phase	Part	Description	Qty	Job	Unit	LU	Change	Change LU	Reversed	Stock	PO	PO Description
Phase 01	DSC-WS-4939	WS-4939 KEY FC	1	1068 - 1	0		-1		0	<input type="checkbox"/>		

Total Material LU: 0, Sub Total: 0.00

Buttons: Capture Original Parts, Documents, Apply

Commissions

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.

Job - 1068 (Mark Miller)

Job	Customer	Site
CO 1068 - 1	Miller Woodcrafting	Mark Miller
CO 1068 - 2	10255 Haggerty Road Plymouth, MI 48170 (734) 351-2200	10255 Haggerty Road Plymouth, MI 48170 (734) 351-2200

CO 1068 - 2 - Commissions

Commissionable / Splits

Install Total: 0.00 Salesperson 1: George.McGee 100.00 %
Commissionable %: 100.00 Salesperson 2: 0.00 %
Commissionable: 0.00
Recurring: 0.00

Salesperson	Commission Type	Post Date	Commissionable	Rate	Commission
-------------	-----------------	-----------	----------------	------	------------

Total Commission: 0.00

Salesperson: **George.McGee** Commissionable: -168.50
Commission Type: Install Rate: 15.00
Posting Date (GL): 11/19/2014 Commission: -25.28
 Select from all other Salespeople