BOLD GROUP

SedonaOffice
Job Change Orders

CONTENTS

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.

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.*

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.
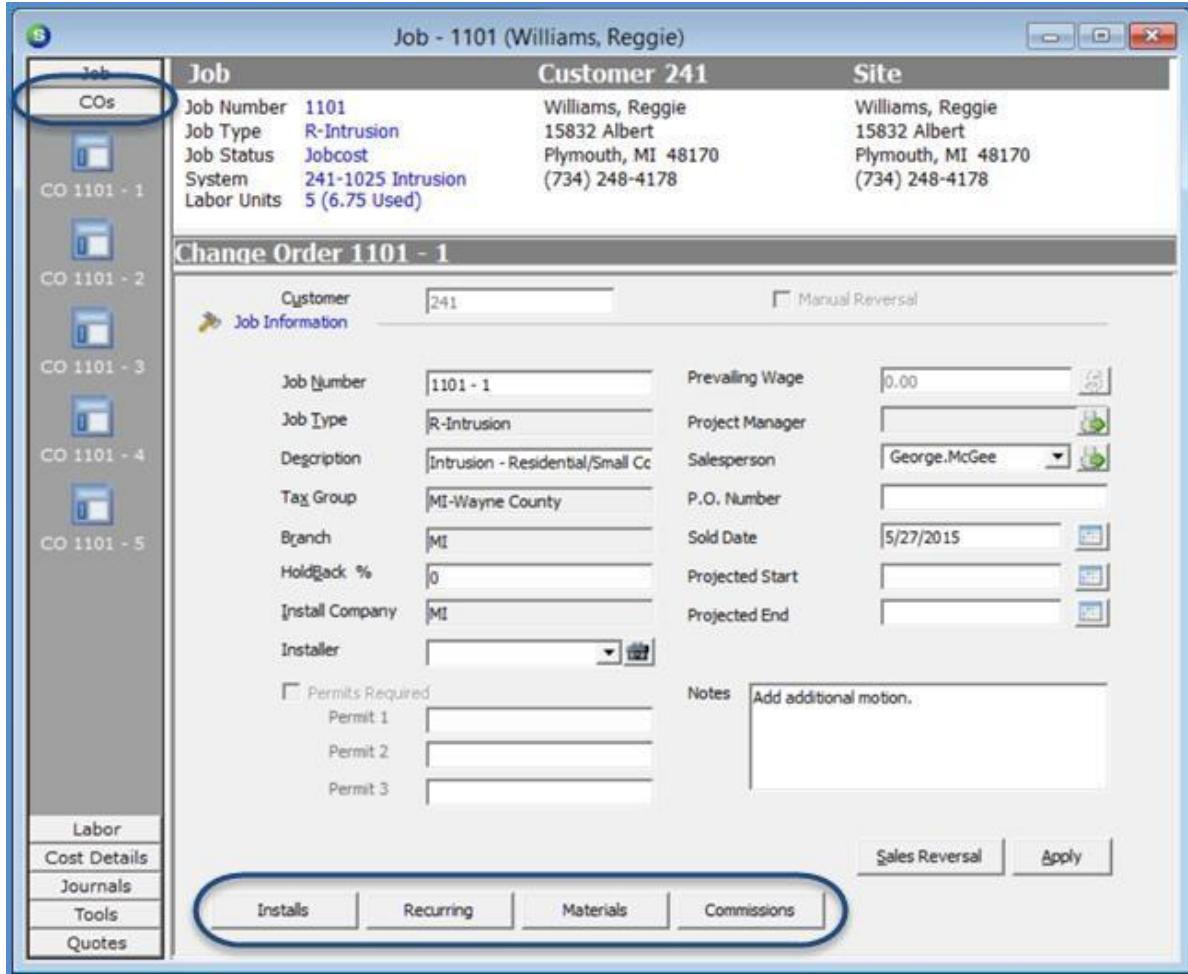
Change Orders - Positive

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.

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.

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.
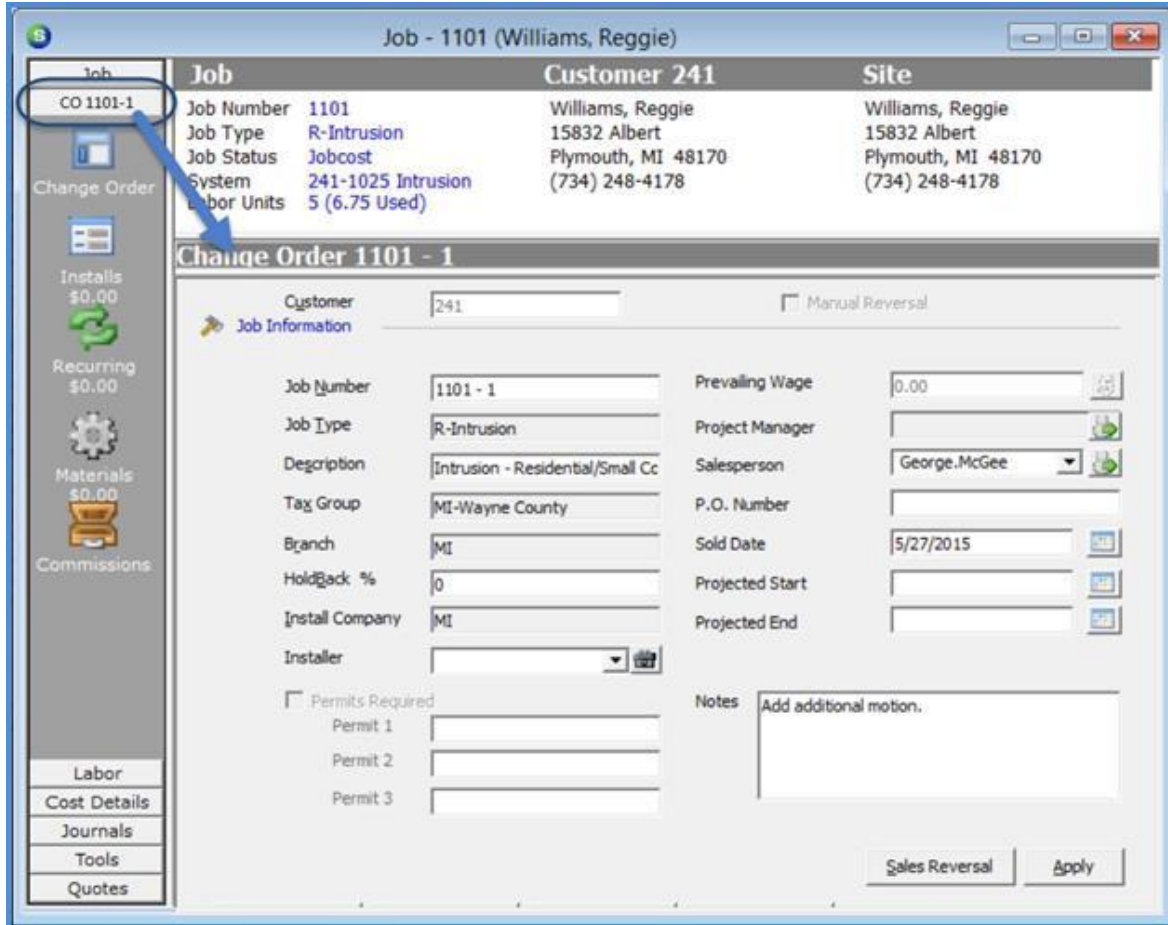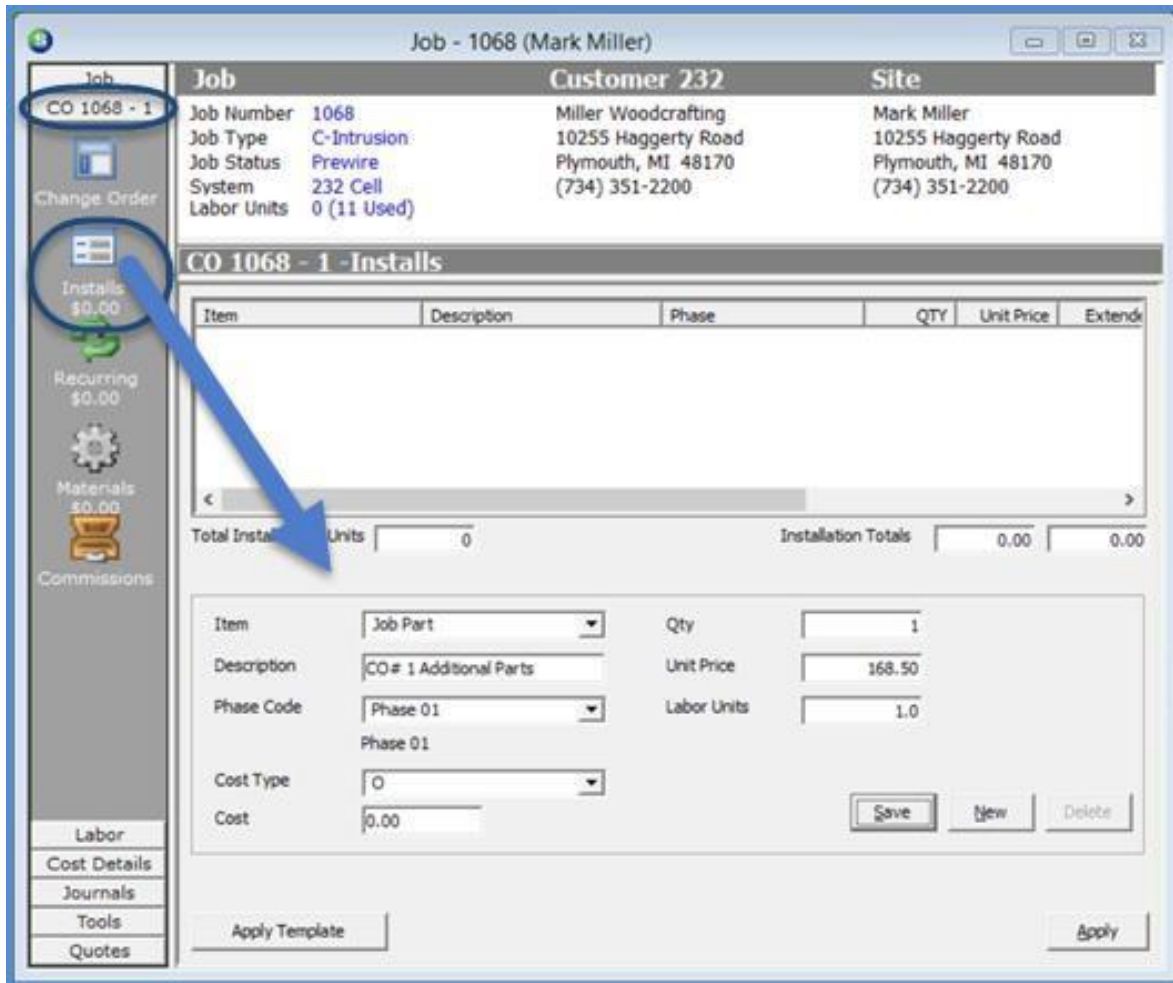
Install Charges

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.
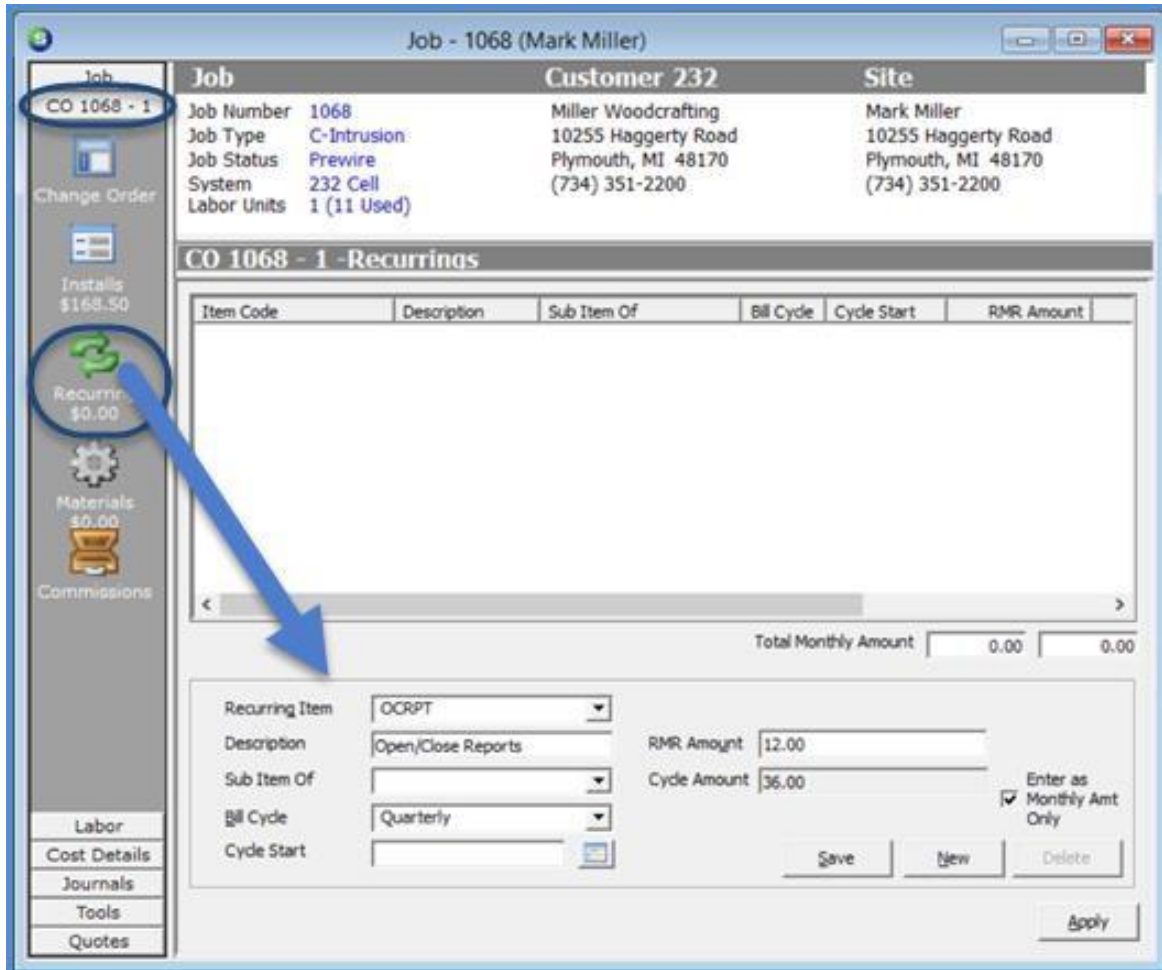
Recurring Charges

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.
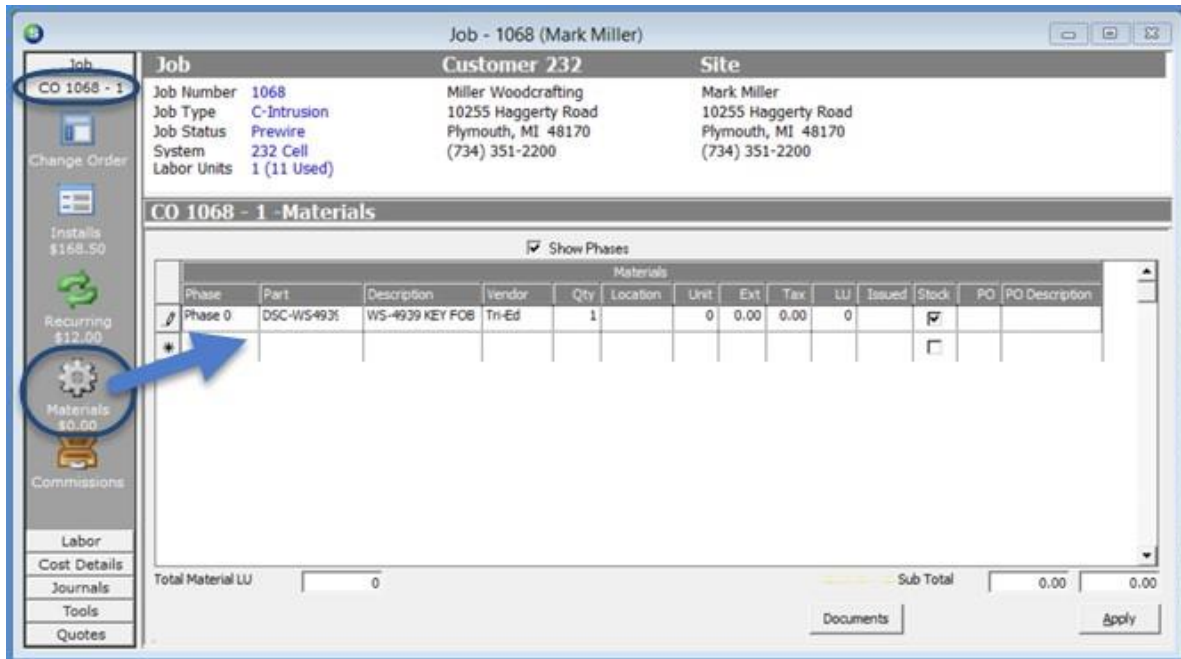
Material Charges

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.
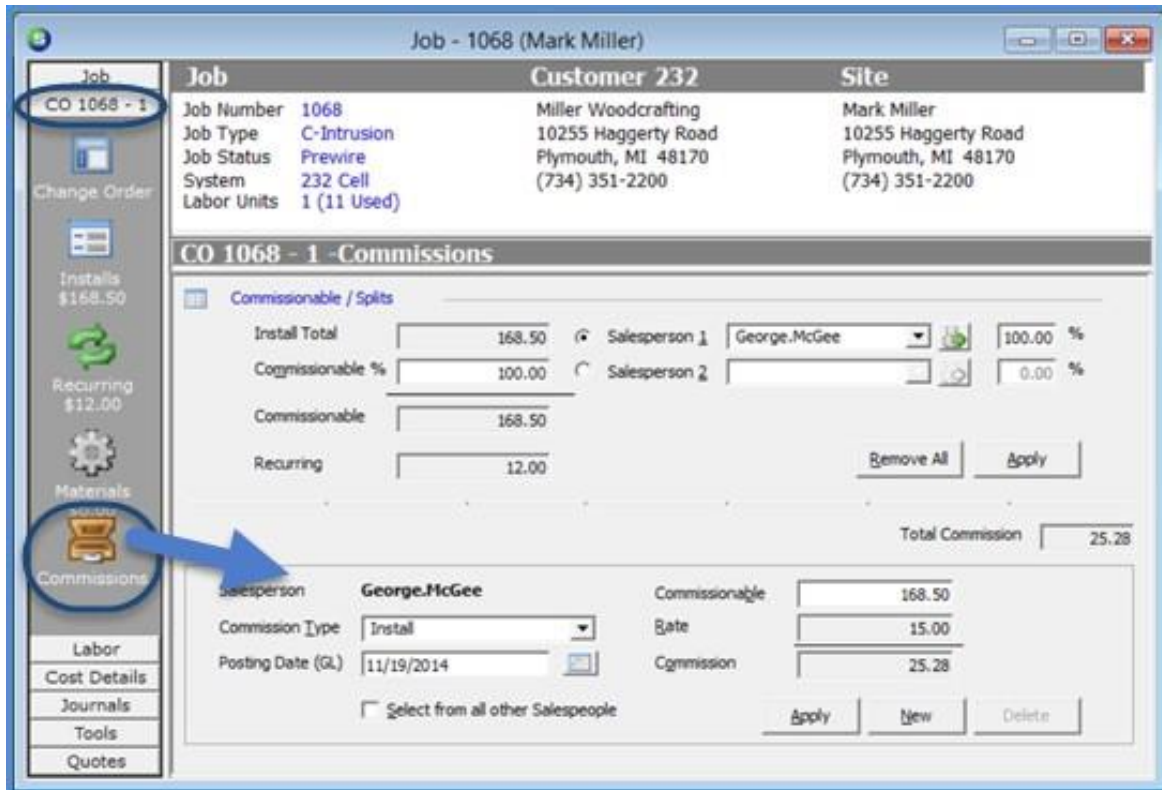
Commissions

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.

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.

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.
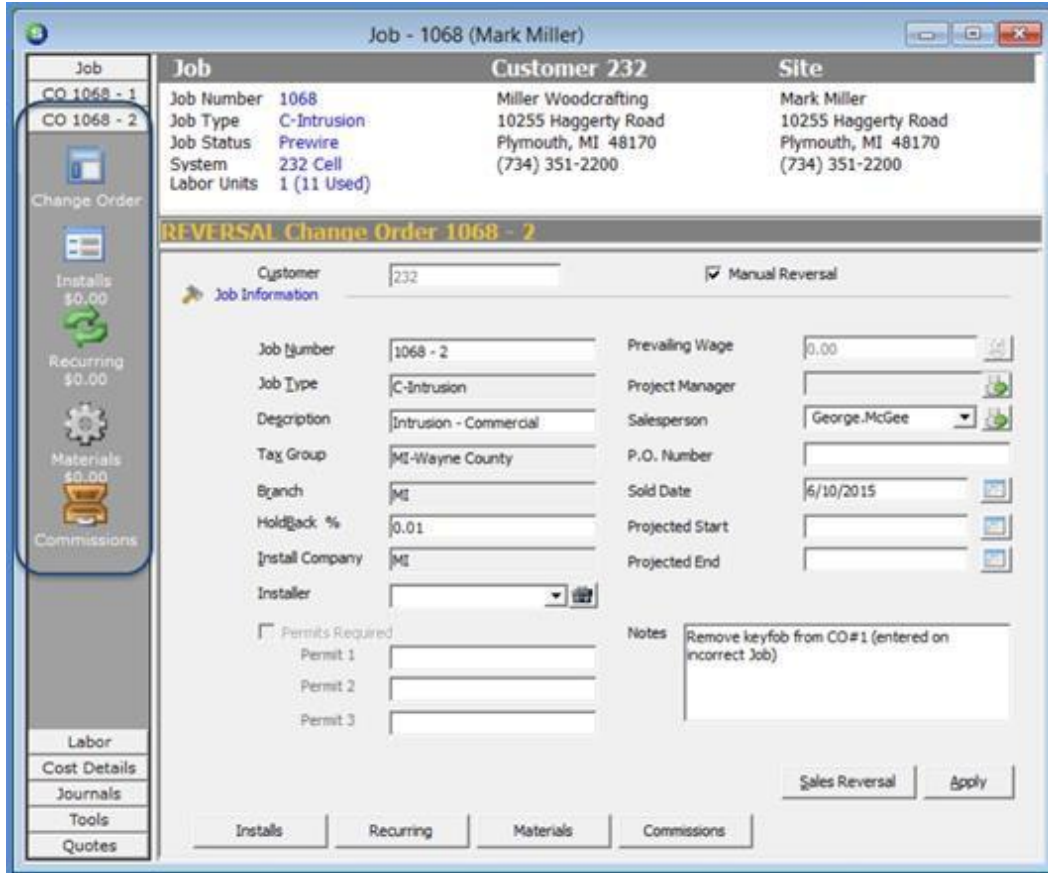
Install Charges

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.

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.
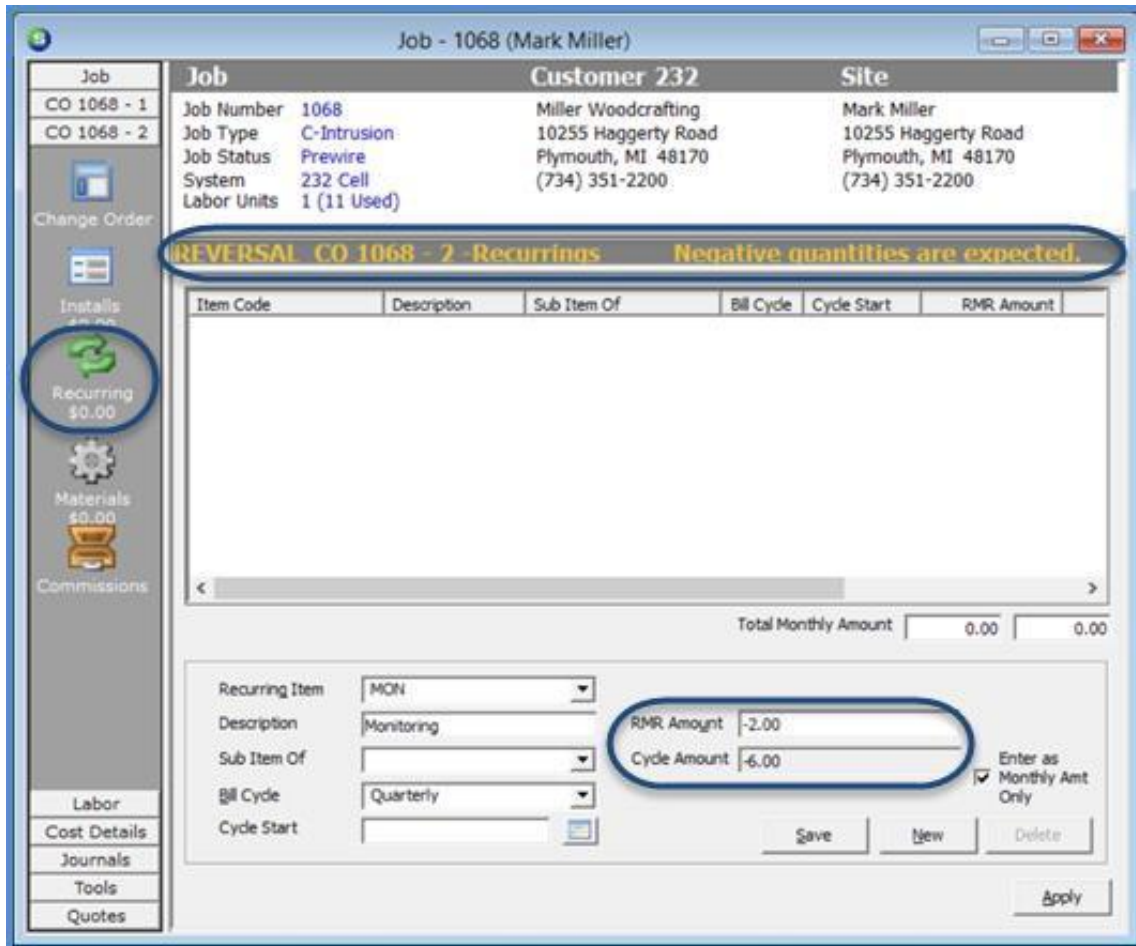
Material Charges and/or Quantities

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.

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.