

CHANGE ORDERS

What Is The Change Order Feature?

Projectmates change order tool allows clients positive and negative contract adjustments directly in the software itself. Change orders are tied to the original contracts as well as the project budget in order to not only track contract adjustments, but also provide projections to the team.

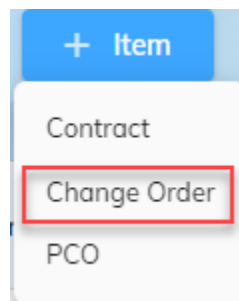
Creating Change Orders And Linking PCOs

Change Orders can only be created against an awarded and approved contract. The contract details allow a lot of relevant info to populate automatically.

1. From within a project, the change order tool can be found by navigating to the **Cost Tracking** tab on the left side menu and selecting the option for **Contract/PCO/Change Order**.

Contract / PCO / Change Order

2. Click the **+Item** button located in the upper right-hand corner.
3. Select the of for **Change Order** that appears in the drop down.



4. Select the proper contract from the drop down.
 - a. If you are vendor then you will likely only see your contract.

- b. If you are managing a CO on behalf of a vendor, then take care to select the correct one.

5. Add your details to the **Description** box.

Description *

CO#004.002:

'Description' following number is required.

6. Click on the blue circle/chain link button to link any previously approved PCOs to this CO.

Contract
Contract - Can Do Construction GC Contract

Change Order Item # * 004.002

Description * CO#004.002:

Division * 00000



- a. Check the box next to PCOs that need to be linked.
- b. Click **Save And Close** to Execute. PCOs will appear on the items tab.

Select PCO to Link

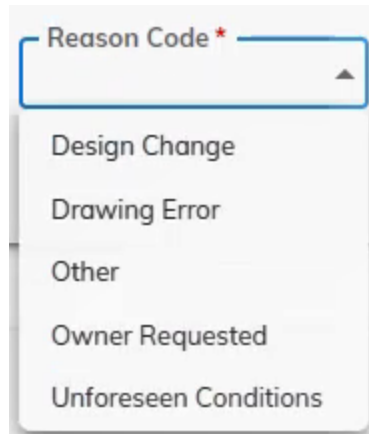
☐	PCO Type	PCO Number	PCO Description	Total Approved Cost	Total Approved Days
☐	PCO	004.001	PCO: Can Do Construction GC Contract	6000	0 
☐	PCO	004.002	PCO: Can Do Construction GC Contract	16000	0 

Close

Save And Close

Note: Only fully approved PCOs associated with this contract will be available to be linked.

7. Next, select a reason code from the drop-down menu. This is a required field.



Reason Code *

- Design Change
- Drawing Error
- Other
- Owner Requested
- Unforeseen Conditions

8. If applicable, add additional detail for **Days Changed, Scope of Work,** or **Notes** at the bottom of the form.
9. Click **Save & Next** to commit your info and move to the items tab.



10. The items tab will host the original SOV from the contract along with any linked PCOs. Enter in dollar values as needed.
 - a. The PCO will already host the previously approved PCO dollar values.
11. Click **Save & Next** to commit dollar values and go to the attachments tab.
12. Upload or drag-and-drop necessary back up documentation.
 - a. The client may have required docs outlined below the file manager.

General Items **Attachments** Approval

Attachments



Click or Drag Files

Required Files

desc*

 Upload  Download template

13. On the **Approval** tab select an approval from the drop-down menu.
- If more than one approval workflow is available, select the one that best describes your CO.

Select Approval Type

- Standard Project Approval
- CO Approval for Contractors - Contractors
- Internal Change Orders - Use for internal approval

14. Next be sure and click **Start Approval** to initiate the approval process.
- Note:** A change order must be fully approved in Projectmates, before it will be visible and available for billing on an invoice in Projectmates.