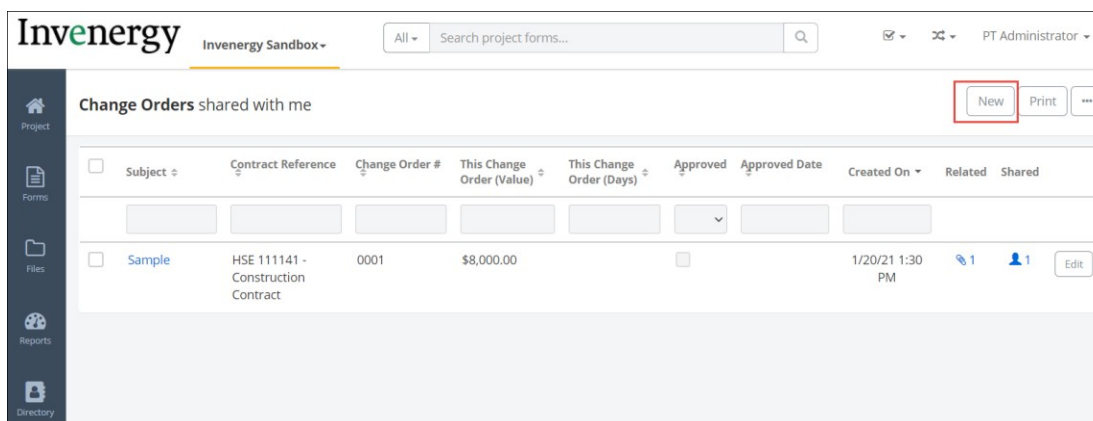


Create Change Orders

Once you have established Contracts in ProjectTeam, you can start creating Change Orders against those Contracts. You can initiate a Change Order from the Change Order log or you can create from existing Potential Change Orders. Either way, the fields of the form are the same.

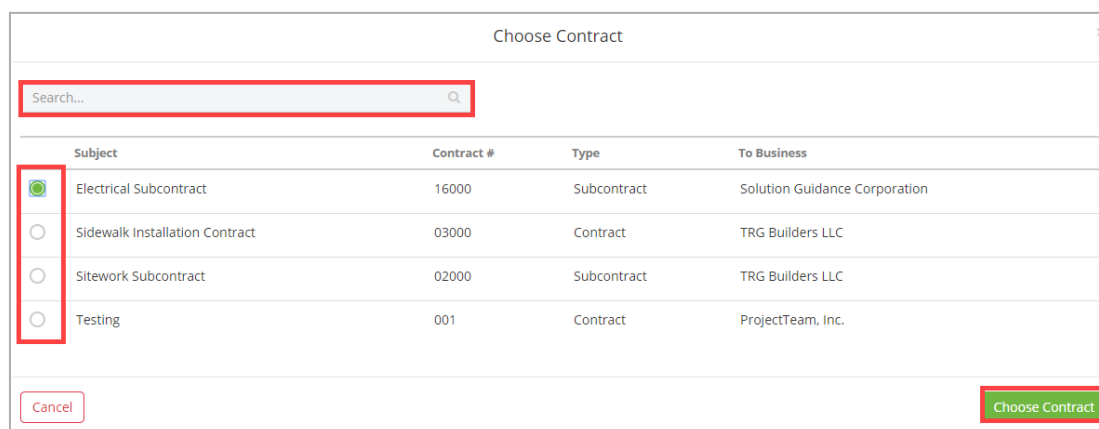
Creating a new Change Order

1. Navigate to the Change Order log within a project.
2. Click the **New** button on the top of the Change Order log.



The screenshot shows the 'Change Orders shared with me' interface. At the top right, there are buttons for 'New', 'Print', and a menu icon. The 'New' button is highlighted with a red box. Below the buttons is a table with columns: Subject, Contract Reference, Change Order #, This Change Order (Value), This Change Order (Days), Approved, Approved Date, Created On, Related, and Shared. A sample entry is shown with the subject 'Sample' and contract 'HSE 111141 - Construction Contract'.

3. The User will be prompted to choose a contract. Use the **Search** box at the top of the form to easily locate the contract and select the contract by using the **radio** buttons to the left of the contract subject. Once selected click the **Choose Contract** button at the bottom of the form.



The screenshot shows the 'Choose Contract' dialog box. At the top, there is a search box labeled 'Search...' which is highlighted with a red box. Below the search box is a table with columns: Subject, Contract #, Type, and To Business. The first row, 'Electrical Subcontract', has its radio button highlighted with a red box. At the bottom right, there is a 'Choose Contract' button highlighted with a green box.

| Subject | Contract # | Type | To Business |
|---|------------|-------------|-------------------------------|
| <input checked="" type="radio"/> Electrical Subcontract | 16000 | Subcontract | Solution Guidance Corporation |
| <input type="radio"/> Sidewalk Installation Contract | 03000 | Contract | TRG Builders LLC |
| <input type="radio"/> Sitework Subcontract | 02000 | Subcontract | TRG Builders LLC |
| <input type="radio"/> Testing | 001 | Contract | ProjectTeam, Inc. |

4. Enter data into the required field **Subject**. The **Contract Reference**, **Change Order Type**, **Change Order #**, **From Business and Contact**, and **To Business and Contact** will automatically populate with information contained in the Contract selected.

New Change Order

Cancel Save & Share

DETAILS

General Change Detail

Subject * Required
Type the Subject

Contract Reference ⓘ
16000 - Electrical Subcontract

Change Order Type
Subcontract

Change Order #
0004

From Business
ProjectTeam, Inc.

From Contact
Ty Witmer (ProjectTeam, Inc.)

5. Enter the **This Change Orders (Days)** approved to complete the Scope of Work. Days entered in this field will be added to the contract completion date of the base contract. Click the **Save** button periodically to save changes.

New Change Order

Cancel Save & Share

Original Contract Value
\$300,000.00

Sum of Previously Approved Changes (Value)
\$2,000.00

Previous Contract Value
\$302,000.00

This Change Order (Value)

Revised Contract Value
\$302,000.00

Original Contract Completion Date
1/10/20

Sum of Previously Approved Changes (Days)
0

Previous Contract Completion Date
1/10/20

This Change Order (Days)

Revised Contract Completion Date ⓘ
1/10/20

Approval Sequence

6. Click the **Change Detail** tab and the **Edit** button to add the details of this Change Order.

The screenshot shows the 'Change Orders' interface. At the top, there's a header with 'Change Order: Additional Structural Steel' and 'Created By Debra Rakes (ProjectTeam, Inc.) on 1/11/19 at 3:43 PM'. Below this, there's a 'SHARED WITH (2) View All' section. The main content area has a 'DETAILS' tab selected, with a red box highlighting the 'Edit' button. Below the 'DETAILS' tab, there's a 'Change Details' table with the following data:

| Source Type | Work Description | Ref # | Approved Amount | Approved Days |
|-------------|-----------------------------|-------|------------------|---------------|
| PCO | Additional Structural Steel | 010 | \$2,000.00 | |
| | | | Total \$2,000.00 | |

On the right side, there's an 'ACTION ITEMS' section with a 'New' button and a 'Show complete/obsolete items' checkbox. Below that is an 'ACTIVITY' section with a 'Comments' tab and a 'Post' button. At the bottom, there's a message: 'No comments added to this document yet. Be the first to comment.'

7. Click the **Add PCO** button if the details information is contained in a Potential Change Order or the **Create New** button to manually add details for the Change Order.

The screenshot shows the 'Edit Change Order' interface. At the top, there's a header with 'Edit Change Order' and 'Cancel' and 'Save' buttons. Below this, there's a 'DETAILS' tab selected, with a red box highlighting the 'Add PCO' and 'Create New' buttons. Below the 'DETAILS' tab, there's a 'Change Details' table with the following data:

| Source Type | Work Description | Ref # | Approved Amount | Approved Days |
|-------------|-----------------------------|-------|------------------|---------------|
| PCO | Additional Structural Steel | 010 | \$2,000.00 | |
| | | | Total \$2,000.00 | |

8. Depending on your choice in Step 7,
- Add PCO: Add Change Details** which takes you to the PCO records that are not contained in an existing change order will appear. Use the **Search** box to easily location your record and use the **radio** button to select the appropriate change detail. Click the **Add** button to save the selection.

| Work Description | Ref # | Approved Amount | Approved Days |
|---|-------|-----------------|---------------|
| <input type="checkbox"/> Testing | | \$0.00 | |
| <input checked="" type="checkbox"/> Additional Structural Steel 2 | 011 | \$5,000.00 | |
| <input type="checkbox"/> Additional Structural Steel | 011 | \$10,000.00 | |

- Create New:** The **Add Change Details** modal window will open. Complete the details for this change and click the **Add** button to save the entry.

9. The information will populate the Change Details.

| Source Type | Work Description | Ref # | Approved Amount | Approved Days |
|-------------|-----------------------------|-------|-----------------|---------------|
| PCO | Additional Structural Steel | 010 | \$2,000.00 | |
| Total | | | \$2,000.00 | |

10. Use the **dropdown menu** should you need to **Insert above**, **Insert below** or **Remove** items from the Change Details.

The screenshot shows the 'Edit Change Order' form with the 'DETAILS' tab selected. The 'Change Detail' sub-tab is active. The 'Change Details' table has columns: Source Type, Work Description, Ref #, Approved Amount, and Approved Days. A dropdown menu is open for the first row, showing options: 'Insert above', 'Insert below', and 'Remove'. The table contains one row with Source Type 'PCO', Work Description 'Additional Structural Steel', Ref # '010', and Approved Amount '\$2,000.00'. A 'Total' row shows '\$2,000.00'.

| Source Type | Work Description | Ref # | Approved Amount | Approved Days |
|-------------|-----------------------------|-------|-----------------|---------------|
| PCO | Additional Structural Steel | 010 | \$2,000.00 | |
| Total | | | \$2,000.00 | |

11. Click the **Save** button to save the entry.

The screenshot shows the 'Edit Change Order' form with the 'DETAILS' tab selected. The 'Change Detail' sub-tab is active. The 'Change Details' table is the same as in the previous screenshot, but the dropdown menu is closed. The 'Save' button is highlighted in green.

| Source Type | Work Description | Ref # | Approved Amount | Approved Days |
|-------------|-----------------------------|-------|-----------------|---------------|
| PCO | Additional Structural Steel | 010 | \$2,000.00 | |
| Total | | | \$2,000.00 | |