



Module 3 – Subcontract Management

Chapter 02

REQUEST FOR SUBCONTRACT CHANGE ORDERS

Date	Version	ProjectPro Version	Author
April 9, 2025	1.0	Initial Version	Functional Team

Subcontract Management – Request for Subcontract Change Orders

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Subcontract Management – Request for Subcontract Change Orders

INTRODUCTION

Subcontract Change Request is created when a user receives any additional change request, to avoid hampering the existing scope of work. After the approval of the request, you can turn them to an actual Subcontract Change Order.

PROJECTS SETUP

The Projects Setup has the default No. Series for Subcontract Change Request under Numbering fast tab.

Projects Setup

Actions ▾

Numbering

Project Nos. JOB ▾	Change Req Nos. CR ▾
Project WIP Nos. JOBWIP ▾	SubContract Change Req Nos. SCR ▾
Subcontract Nos. SUBCONT ▾	Contact No Series PROJ_CONT ▾
Draw Nos. DRAW ▾	Progress Billing Numbers
Lien Release Report ID 14021302 ▾	Progress Billing Nos. S-INV ▾
Lien Release Document 01 Name Lien Release 01	Sales Invoice Nos. PBS-INV ▾
Prepayment Nos. (Obsolete) ▾	Posted Sales Invoice Nos. PBS-INV+ ▾
Quote Nos. JOBQUOTES ▾	Credit Memo Nos. S-CM ▾
Change Order Nos. ▾	Posted Credit Memo Nos. S-CM+ ▾
Work Order Nos. WO ▾	JFW Batch Document Nos. JFW ▾
	Price List Nos. ▾

SUBCONTRACT CHANGE REQUEST

Create a subcontract in the similar manner as per the business requirement and additionally, click on “Create Change Request” from Actions → Functions → Create Change Request on the ribbon.

Subcontract Card

SC20028 · Building Construction · Master Subcontract

Get Job Budget Lines | Create PO or Add Lines to PO | View Purchase Order | Update Purchase Order | Ledger Entries | Subcontract Agreement | Custom Reports

Buy-from Name 84 Lumber	Search Description BUILDING CONS
Buy-from Address 56 West Main Street	Person Responsible
Buy-from Address 2 -	Person Responsible Name
Buy-from City Little Rock	Job No. J01170
Buy-from State Arkansas	Purchase Document No. PO-50139
Buy-from Contact	Last Date Modified 11/2/2023

User Tasks

ProjectPro AI

Create Change Order

Create Change Request

Merge Change Request

Vendor Insurances

Other

This will open a subcontract card with the Subcontract Class as “Change Request”. You have the option to either copy the master subcontract lines or add new lines to the change request.

Subcontract Management – Request for Subcontract Change Orders

Subcontract Card ✓ Saved

SCR0002 · Building Construction · Change Request

[Get Job Budget Lines](#)
[Create PO or Add Lines to PO](#)
[View Purchase Order](#)
[Update Purchase Order](#)
[Ledger Entries](#)
[Subcontract Agreement](#)
[Custom Reports](#)

Constants

Vendor's Job No.	<input type="text"/>	Completion Date	<input type="text"/>
Contract Date	3/4/2024	Retention Percent	0.00
Starting Date	<input type="text"/>	Status	Planning
Ending Date	<input type="text"/>	Subcontract Class	Change Request

You can have multiple Change Requests as required. To approve the Change Request, the manager must change the status to “Approved” under the Manager fast tab.

SCR0002 · Building Construction · Change Request

[Get Job Budget Lines](#)
[Create PO or Add Lines to PO](#)
[View Purchase Order](#)
[Update Purchase Order](#)
[Ledger Entries](#)
[Subcontract Agreement](#)
[Custom Reports](#)

Invoice and Payments >

Manager

Reporting Status	Approved	Starting Date	<input type="text"/>
Status Date	3/4/2024	Estimated Ending Date	<input type="text"/>
Estimated Start Date	<input type="text"/>	Ending Date	<input type="text"/>

The different change requests then can be merged into one change order. To do that, click on “Actions → Functions → Merge Change Request” from the ribbon.

Subcontract Card ✓ Saved

SC20028 · Building Construction · Master Subcontract

[Get Job Budget Lines](#)
[Create PO or Add Lines to PO](#)
[View Purchase Order](#)
[Update Purchase Order](#)
[Ledger Entries](#)
[Subcontract Agreement](#)
[Custom Reports](#)

Buy-from Name	84 Lumber	Search Description	BUILDING CONS
Buy-from Address	56 West Main Street	Person Responsible	<input type="text"/>
Buy-from Address 2	-	Person Responsible Name	<input type="text"/>
Buy-from City	Little Rock	Job No.	J01170
Buy-from State	Arkansas	Purchase Document No.	PO-50139
Buy-from Contact	<input type="text"/>	Last Date Modified	11/2/2023

User Tasks

ProjectPro AI

Create Change Order

Create Change Request

Merge Change Request

Vendor Insurances

Other

This will open the Subcontract Change Request List, showing all the Approved Change Requests.

Subcontract Management – Request for Subcontract Change Orders

Subcontract Change Request List ✓ Saved

Search Analyze New ▼ Edit List Delete More options

Change Request No. ↑	Description	Sub-Level Subcontract No. ▼	Manager Status ▼
→ SCR0001	⋮ Building Construction	SC20028	Approved
SCR0002	Building Construction	SC20028	Approved
SCR0003	Building Construction	SC20028	Approved

Select the Change Requests that you want to merge and click on “New → Merge” from the ribbon.

Subcontract Change Request List ✓ Saved

Search Analyze New ▼ Edit List Delete More options

Change Request No. ↑	Description	Sub-Level Subcontract No. ▼	Manager Status ▼
<input checked="" type="checkbox"/> SCR0001	Building Construction	SC20028	Approved
<input type="checkbox"/> SCR0002	Building Construction	SC20028	Approved
→ <input checked="" type="checkbox"/> SCR0003	⋮ Building Construction	SC20028	Approved

+ New
* Merge

The user has the option to either create a new change order or merge it into an existing one.

Subcontract Change Request Transfer to Change ...

Options

Create New Change Order

Append to Change Order No.

OK
Cancel

Subcontract Management – Request for Subcontract Change Orders

On selecting either of the options, the Change Request gets merged. The Status and the Reporting Status of the Merged Change Request becomes Complete after merging it into a change order.

Subcontract Card ✓ Saved

SCR0001 · Building Construction · Change Request

[Get Job Budget Lines](#)
[Create PO or Add Lines to PO](#)
[View Purchase Order](#)
[Update Purchase Order](#)
[Ledger Entries](#)
[Subcontract Agreement](#)
[Custom Reports](#)

Constants

Vendor's Job No.	<input type="text"/>	Completion Date	3/4/2024
Contract Date	3/4/2024 <input type="text"/>	Retention Percent	0.00
Starting Date	<input type="text"/>	Status	Completed
Ending Date	<input type="text"/>	Subcontract Class	Change Request

Invoice and Payments >

Manager

Reporting Status	Completed	Starting Date	<input type="text"/>
Status Date	3/4/2024	Estimated Ending Date	<input type="text"/>
Estimated Start Date	<input type="text"/>	Ending Date	<input type="text"/>

Activate Windows
Go to Settings to activate Windows.

The merged change request also shows the “Merged to Change Order No.” field with the resultant Change Order No.

Subcontract Card ✓ Saved

SCR0001 · Building Construction · Change Request

[Get Job Budget Lines](#)
[Create PO or Add Lines to PO](#)
[View Purchase Order](#)
[Update Purchase Order](#)
[Ledger Entries](#)
[Subcontract Agreement](#)
[Custom Reports](#)

General

No.	SCR0001	Buy-from Zip Code	65479
Description	Building Construction	Sub-Level to Subcontract No.	SC20028
Buy-from Vendor No.	10000	Merged to Change Order No.	SC20028.003
Buy-from Name	84 Lumber	Search Description	BUILDING CONSTRUCTION
Buy-from Address	56 West Main Street	Person Responsible	<input type="text"/>
Buy-from Address 2	-	Person Responsible Name	<input type="text"/>
Buy-from City	Little Rock	Job No.	J01170
Buy-from State	Arkansas	Purchase Document No.	<input type="text"/>
Buy-from Contact	<input type="text"/>	Last Date Modified	3/4/2024

The reference to the Change Request No. can be seen on the subcontract lines from which it came.

Subcontract Management – Request for Subcontract Change Orders

Subcontract Card
Saved

SC20028.003 · Building Construction · Change Order

Get Job Budget Lines Create PO or Add Lines to PO View Purchase Order Update Purchase Order Ledger Entries Subcontract Agreement Custom Reports

Buy-from City	Little Rock	Job No.	J01170
Buy-from State	Arkansas	Purchase Document No.	
Buy-from Contact		Last Date Modified	

Lines | [Manage](#) Line

[New Line](#) [Delete Line](#)

Type ↑	Quantity	Unit of Measure Code	Unit Cost	Total Cost	PO No.	PO Line No.	Dept Code	Div Code	Location Code	Change Request No.	Segment Code
→ Resource	1	HR	100,000.00	100,000.00		0	GM	SER		SCR0003	
Item	1	EA	1,000.00	1,000.00		0	GM	SER		SCR0003	