



Module 02 – Progress Billing
Chapter 03
CHANGE ORDERS

Date	Version	ProjectPro Version	Author
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INTRODUCTION

A change order is work that is added to the original scope of work of a contract. A change order may force a new project to handle significant changes to the current project.

CHANGE ORDERS

A change order for a job can be created in two ways,

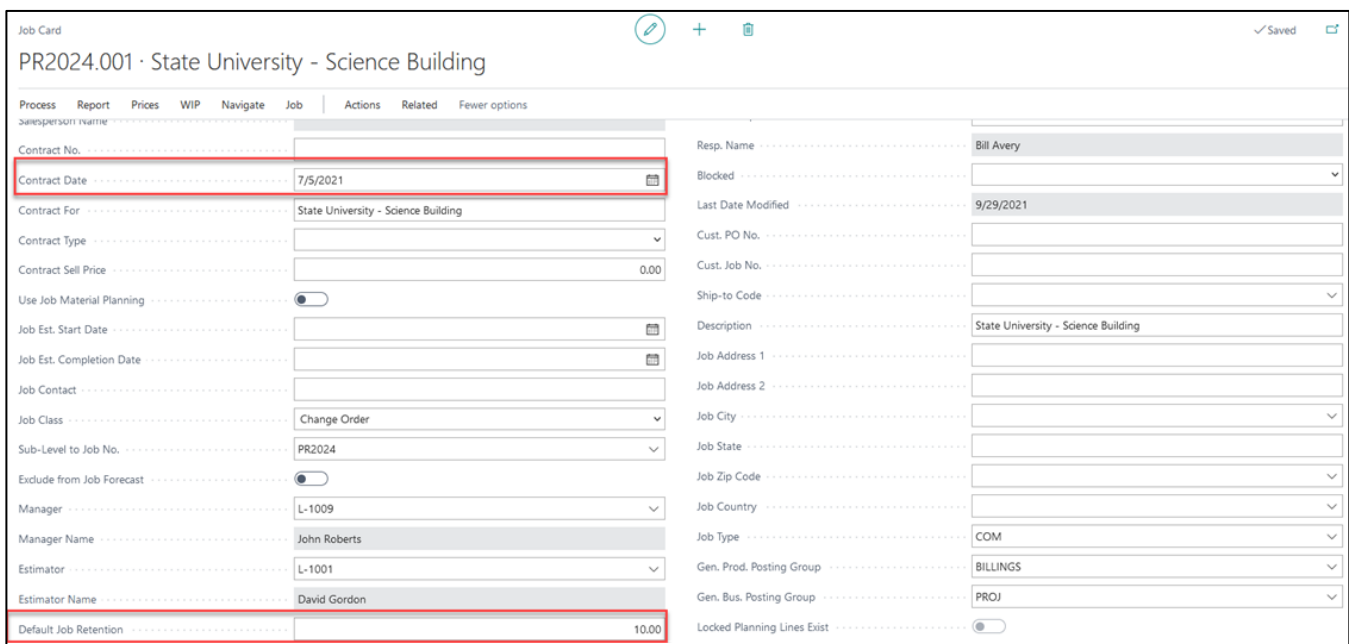
- One is the standard process, where you create a separate document for a job using “Create Change Order” function.
- Second is to mark the job planning lines “Change Order” on the Master Job itself.

You can include both the forms of change order into the Progress Billings.

1. Addition of Change Order Document

To include a change order job in a progress billing requisition, below are certain points related to “Contract Date” and “Default Job Retention %” (if applicable) that must be noticed for correct and smooth process.

- The Contract Date on the job card is used to alter whether a Change Order Job is to be shown as ‘Current Month’ change orders or ‘Previous Months’.
- The Contract Date on the job card is compared to the Requisition Billing Date on a progress bill.
- If the change order contract dates are in the same month as the requisition date, then the change order billing value will show as ‘Current Month’ change order.
- If the change order contract date is prior to requisition billing date, then it will show as previous month’s change order.
- If you do not enter any date in the contract date, the change order will not appear on the billing documents at all.



Job Card		PR2024.001 · State University - Science Building	
Contract No.		Resp. Name	Bill Avery
Contract Date	7/5/2021	Blocked	
Contract For	State University - Science Building	Last Date Modified	9/29/2021
Contract Type		Cust. PO No.	
Contract Sell Price	0.00	Cust. Job No.	
Use Job Material Planning	<input checked="" type="checkbox"/>	Ship-to Code	
Job Est. Start Date		Description	State University - Science Building
Job Est. Completion Date		Job Address 1	
Job Contact		Job Address 2	
Job Class	Change Order	Job City	
Sub-Level to Job No.	PR2024	Job State	
Exclude from Job Forecast	<input checked="" type="checkbox"/>	Job Zip Code	
Manager	L-1009	Job Country	
Manager Name	John Roberts	Job Type	COM
Estimator	L-1001	Gen. Prod. Posting Group	BILLINGS
Estimator Name	David Gordon	Gen. Bus. Posting Group	PROJ
Default Job Retention	10.00	Locked Planning Lines Exist	<input type="checkbox"/>

Progress Billings – Change Orders

In the Progress Billing for a change order to be considered, the Status must be “Open” on the Constants/Manager fast tab of the job card.

Job Card PR2024.001

Process Report Prices & Discounts WIP Navigate Job Actions Related Fewer options

Constants/Manager

Completion Date [Field]
Job Calendar Code [Dropdown]
Status Open [Dropdown]
Revenue Recognized [Toggle]
Tax Liable [Toggle]

Progress Billing CO: [Toggle]
WIP Method POC
WIP Posting Method Per Job
Job Posting Date 6/14/2022
Recognition Date [Field]

To select a change order on the progress billing,

- In case of the first requisition, you can use the “Get Billings” function and select the required change order job.
- If you are creating a second/subsequent requisition or a new version for an existing requisition, then the system will display a message as below, where you can click on Yes to add the change order.

Progress Billing PR2024 · 1 · 0

Process Reports Actions Related Fewer options

General

No. PR2024
Requisition No.
Version No.
Job No. PR2024
Job Name Arch/Eng Contact Architect/Engineer
Draw No. Arch Eng Contact Code

There are 1 new change Orders, would you like to add them to this requisition

Yes No

You’ll notice that Planning Line from Change Order has now been added to your Progress Billing Lines.

Progress Billings – Change Orders

PR2024 · 2 · 0

Process Reports More options

Requisition No. 2	Round Amounts <input type="checkbox"/>
Version No. 0	Final <input type="checkbox"/>
Job No. PR2024	Owner Contact Owner
Job Name State University - Science Building	Owner Contact Code
Draw No.	Arch/Eng Contact Architect/Engineer
Customer No. 10003	Arch Eng Contact Code
Customer Name Nesbitts Construction	Status Open
Manager L-1009	Document No.
Manager Name John Roberts	Requisition Date 7/30/2021
Person Responsible L-1005	Period To 7/30/2021

Progress Billing Subform Manage

Item No.	Job No.	Revenue Cat. Description	Job Task No.	Description	Billing Method	Base Amount	Quantity	Total	Work Previous Billings	Work Amount	Stored Materials Amount	Previous Work Unit	Work Retention Percent	Work Retention Amount
→ 1	PR2024	CONTRACTS		Concrete Subcontract Work	%	300,000.00	20.00	60,000.00	15,000.00	45,000.00	0.00	5.00	10.00	6,000.00
2	PR2024	CONTRACTS		Concrete Work	%	100,000.00	30.00	30,000.00	25,000.00	5,000.00	0.00	25.00	10.00	3,000.00
1	PR2024.001		05	Metal Work	%	10,000.00	0.00	0.00	0.00	0.00	0.00	0.00	10.00	0.00

From here you can continue the process of the normal progress billing and run each available report to see that the Change Order has been added.

Additionally, on the change order job card under Constants/Manager fast tab, the “Progress Billing No.” field will get updated with the Master Job No., and the “Progress Billing CO” Boolean will become “True”.

Job Card Saved

PR2024.001

Process Report Prices & Discounts WIP Navigate Job Print/Send Actions Related Reports Fewer options

Tax Area Code BUFFALO, NY	Requires Certified Payroll <input type="checkbox"/>
Tax Bus. Posting Group	Unit of Measure
Line Type	Apply Usage Link <input checked="" type="checkbox"/>
Job Posting Group COM	% of Overdue Planning Lines ... 100.00
Tax Prod. Posting Group	Forecast Type % of Budget
Allow Budget/Billable Lines ... <input type="checkbox"/>	Billing Day of Month
Progress Billing No. PR2024	Gen. Prod. Posting Group
Progress Billing CO: <input checked="" type="checkbox"/>	

2. Addition of Change Order Planning Line

On a job while creating the job planning lines, identify the lines that need to be marked as “Change Order”, see below.

Progress Billings – Change Orders

J002820 Building Construction 112 CONTRACTS CONTRACTS

Job Planning Lines Search + New Edit List Delete Home Report Actions Related Reports Fewer options

Create Sales Invoice... Sales Invoices/Credit Memos... Reserve... Open Job Journal Get Job Task Segments Lock/Unlock DFR
 Create Job Journal Lines Create Sales Credit Memo... Item Tracking Lines Get Job Segments Create DFR Sales Invoice

Line Job Description	Unit Cost	Total Cost	Unit Price	Line Amount	Use Tax	Use Tax Percentage	Use Tax Amount	Segment Code	Use Job Plan... Line	Change Order	Qty. to Transfer to Journal
→ Building Construction 112	0.00	0.00	30,000.00	30,000.00	<input type="checkbox"/>	0.00	0.00		<input type="checkbox"/>	<input checked="" type="checkbox"/>	0
Building Construction 112	0.00	0.00	50,000.00	50,000.00	<input type="checkbox"/>	0.00	0.00		<input type="checkbox"/>	<input type="checkbox"/>	0

When the planning lines are carried over to the Progress Billing, the markings also get updated to the progress billing lines, see below.

Progress Billing J002820 · 1 · 0

Home Reports Actions Related Fewer options

New Requisition New Version Make Sales Document View Sales Document Price Budget Get Billings... Copy Comments Statistics Get Job Planning Lines

Progress Billing Subform Manage Line Fewer options

Item No.	Store Previous Billings	Previous Work Unit	Current Work Unit	Work Retention Percent	Work Retention Amount	Stored Material Retention Percentage	Stored Material Retention Amount	Job Planning Line No.	Dept Code	Div Code	Contract Forecast Date	Cha... Order	Previous Retention Unit
→ 1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10000			3/31/2023	<input checked="" type="checkbox"/>	0.00
2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	20000			3/31/2023	<input type="checkbox"/>	0.00

3. Reports

Users can also run the report “Combined CO AIA G702 and AIA G703” to analyze the information for Main Contract and Change order.

J002820 · 1 · 0

Home **Reports** Actions Related Fewer options

Progress Invoice Progress Invoice-Rev. Cat. Summ AIA G703 Combined AIA G702 and AIA G703
 Progress Invoice with Units AIA G702 G703-Rev. Cat. Summ **Combined CO AIA G702 and AIA G703**

Progress Billing Subform Manage Line Fewer options

Item No.	Stored Materials Amount	Store Previous Billings	Previous Work Unit	Current Work Unit	Work Retention Percent	Work Retention Amount	Stored Material Retention Percentage	Stored Material Retention Amount	Job Planning Line No.	Dept Code	Div Code	Contract Forecast Date	Cha... Order
→ 1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10000			3/31/2023	<input checked="" type="checkbox"/>
2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	20000			3/31/2023	<input type="checkbox"/>

A two-page report with change order value will be generated which can be sent to your Customer as well, see below.



Progress Billings – Change Orders

APPLICATION AND CERTIFICATE FOR PAYMENT		AIA DOCUMENT G702	1234 3/8/2024
TO OWNER:	PROJECT: Building Construction 112	APPLICATION NO: J002820-1	Distribution to:
		PERIOD TO: 5/1/2023	<input type="checkbox"/> OWNER
		PROJECT NOS.:	<input type="checkbox"/> ARCHITECT
FROM CONTRACTOR:	ProjectPro Constructions Inc. 1250 Pittsford Victor Road Ste310 Pittsford, NY 14534	VIA ARCHITECT:	<input type="checkbox"/> CONTRACTOR
		CONTRACT DATE: 3/31/2023	<input type="checkbox"/>
			<input type="checkbox"/>
CONTRACT FOR: Building Construction 112			
CONTRACTOR'S APPLICATION FOR PAYMENT		The undersigned Contractor certifies that to the best of the Contractor's knowledge, information and belief the Work covered by this Application for Payment has been completed	
Application is made for payment, as shown below, in connection with the Contract Continuation Sheet, AIA Document G703, is attached.		in accordance with the Contract Documents, that all amounts have been paid by the Contractor for Work for which previous Certificates for Payment were issued and payments received from the Owner, and that current payment shown herein is now due.	
1. ORIGINAL CONTRACT SUM	50,000.00	CONTRACTOR: ProjectPro Constructions Inc.	
2. Net change by Change Orders	30,000.00	By: _____ Date: _____	
3. CONTRACT SUM TO DATE	80,000.00		