



Module 01 – ProjectPro Basic
Chapter 07
CHANGE ORDER/WORK ORDER

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INTRODUCTION

A Change Order represents the mutual consensus between the parties on a change to the work, the price, the schedule, or some other term of the contract. As such, a change order must be written out and approved by all parties, which can take time, money, and patience to complete. It acts as an extension of the contract and ensures that all parties understand their new duties and expectations. It details the specific changes the client wants and provides legal notice of any adjustments to the price and timeline that the client should expect.

CHANGE ORDER/WORK ORDER

Jobs Setup

- To create the Change Order/Work Order one must make sure that “Check Master Job No.” on the General fast tab of the Jobs Setup is checked. This is to ensure that while creating Change Order/Work Order, you have the option to create job planning lines for job tasks related to the Master Job.

Jobs Setup

Actions

KPI Calculation Starting Date <input type="text"/>	Highlight Price Less Than Cost <input type="checkbox"/>
KPI Calculation Ending Date <input type="text"/>	FA Job Purchase
Gen. Bus. Posting Group <input type="text" value="PROJ"/>	FA Job Template Name <input type="text"/>
Job Calendars Not Used <input type="checkbox"/>	FA Job Batch Name <input type="text"/>
GBPG for Sub-Job Forecast <input type="text"/>	Check Master Job No. <input checked="" type="checkbox"/>
Job Calendar Source <input type="text" value="Business Central Calendar"/>	Insurance Expiration Notify <input type="checkbox"/>

- Set up the No. Series for Change Order/Work Order on the Numbering fast tab of the Job Setup.
 - For Change Order we only specify the “.” as Change Order Nos.
 - For Work Order you can choose from No. Series defined for the Work Order.

Jobs Setup

Actions

Numbering

Job Nos. <input type="text" value="JOB"/>	Work Order Nos. <input type="text" value="WO"/>
Job WIP Nos. <input type="text" value="JOBWIP"/>	Change Req Nos. <input type="text" value="C-REQ"/>
Subcontract Nos. <input type="text" value="SUBCONT"/>	Progress Billing Numbers
Draw Nos. <input type="text" value="DRAW"/>	Progress Billing Nos. <input type="text" value="S-INV"/>
Lien Release Report ID <input type="text" value="14021302"/>	Sales Invoice Nos. <input type="text" value="S-INV"/>
Lien Release Document 01 Name <input type="text" value="Lien Release 01"/>	Posted Sales Invoice Nos. <input type="text" value="S-INV+"/>
Prepayment Nos. <input type="text"/>	Credit Memo Nos. <input type="text" value="S-CM"/>
Quote Nos. <input type="text" value="JOBQUOTES"/>	Posted Credit Memo Nos. <input type="text" value="S-CM+"/>
Change Order Nos. <input type="text" value="."/>	JFW Batch Document Nos. <input type="text"/>

1. Change Order

On the Job card to create a Change Order, click on **Actions** → **Copy** → **Create Change Order**

The screenshot shows the 'Job Card' interface for 'J01330 · Construction No. 0234'. The 'Actions' menu is open, and the 'Copy' option is selected. The 'Create Change Order' option is highlighted in red. The 'General' section of the job card is visible, showing fields for No., Description, Sell-to Customer No., Contact No., Sell-to Customer Name, Contract No., Contract Date, Contract For, Contract Type, and Contract Sell Price.

When you click on the “Create Change Order” you get the below mentioned dialogue box.

The screenshot shows the 'Job Card' interface for 'J01330 · Construction No. 0234'. A dialog box is displayed in the center, asking 'Do You want to Use Default Tasks of Type Default'. The dialog box has 'Yes' and 'No' buttons. The 'General' section of the job card is visible, showing fields for No., Description, Sell-to Customer No., Sell-to Customer Name, and Bill-to Contact No.

Click on “Yes” if you want Default Tasks or else “No”. When you click “No”, the following screen will appear.

ProjectPro Basic – Change Order/Work Order

Job Card

J01330 · Construction No. 0234

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

General

No. J01330

Description Construction

Sell-to Customer No. 10013

Sell-to Customer Name The Bartle

Bill-to Contact No. C10386

Cust. PO No.

Dialog: ? Do you wish to use Master Job Tasks? [Yes] [No]

Note: This message will only appear if the setup “Check Master Job No.” on the job’s setup is True.

Click on “Yes” to update the Tasks that are available on the Master Job and the change order is created.

After creating the change order, the change order card will be assigned a No. Series of .001 indicating as a first change order for a master job.

Job Card

J01330.001 · Construction No. 0234

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

General Show less

No. J01330.001

Description Construction No. 0234

Sell-to Customer No. 10013

State

ZIP Code

City Tampa

Within the change order we can see the Job class as the change order and the master job from which the change order has been created.

Job Card

J01330.001 · Construction No. 0234

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

Use Job Material Planning

Job Est. Start Date

Job Est. Completion Date

Job Contact

Job Class Change Order

Sub-Level to Job No. J01330

Cust. PO No.

Cust. Job No.

Ship-to Code

Description Construction No. 0234

Job Address 1

Job Address 2

2. Work Order

To create a Work Order, click on **Actions** → **Copy** → **Create Work Order**.

The screenshot shows the ProjectPro interface for a job card titled "J01330 · Construction No. 0234". The "Actions" menu is open, and the "Copy" option is selected. The "Copy" submenu is also open, showing various options, with "Create Work Order" highlighted. The job card details are visible in the background, including fields for No., Description, Sell-to Customer No., Contact No., Sell-to Customer Name, Contract No., Contract Date, Contract For, Contract Type, and Contract Sell Price.

When you click on the “Create Work Order” you get the below mentioned dialogue box.

The screenshot shows the ProjectPro interface for a job card titled "J01330 · Construction No. 0234". A dialog box is displayed in the foreground, asking "Do You want to Use Default Tasks of Type Default". The dialog box has a question mark icon and two buttons: "Yes" and "No". The job card details are visible in the background, including fields for No., Description, Sell-to Customer No., Sell-to Customer Name, and Bill-to Contact No.

For creating Work Order, you can choose to use the Default Tasks or not. After clicking on “Yes” or “No” your Work Order will be created with no. series WO as a new Job.

ProjectPro Basic – Change Order/Work Order

Job Card ✓ Saved

WO-50005 · Construction No. 0234

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

General Show more

No.	WO-50005	Bill-to Customer No.	10013
Description	Construction No. 0234	Name	The Bartlett Group
Sell-to Customer No.		Blocked	
Sell-to Customer Name		Last Date Modified	4/27/2022
Bill-to Contact No.	C10386	Cust. PO No.	
Contract No.		Cust. Job No.	
Contract Date		Ship-to Code	
Contract For	Construction No. 0234	Description	Construction No. 0234

3. Sub Job

To create a Work Order, click on **Actions → Copy → Create Sub Job**.

J00020 · Building Construction 110

Home Prices & Discounts WIP Job Navigate Report Analytics | **Actions** Related Fewer options

General

No.	J00020	DFR Nos.	
Description	Building Construction 110	External Document No.	
Sell-to Customer No.	10001	Blocked	
Sell-to Customer Name	A J Schmidt	Last Date Modified	
Contract No.	234522	Cust. PO No.	

Actions dropdown menu:

- Copy
- Run Batch Open Job Backlog
- Copy Job Tasks from...
- Copy Job Tasks to...
- ProjectPro Copy Job Task to...
- ProjectPro Copy Job Task from...
- Create Sub Job**
- Create Change Order
- Create Change Request

When you click on the “Create Sub Job”, the system directly creates a sub-job using same No. Series as the Change Order (.001, .002, .003, ...) and it will be created in a continuation.

ProjectPro Basic – Change Order/Work Order

J00020 · Building Construction 110

Home Prices & Discounts WIP Job Navigate Report Analytics Actions Related Fewer options

General Show less

No.	J00020		
Description	Building Cons		8339 Schmidts Lane
Sell-to Customer No.	10001		
Contact No.	C10374		Annapolis
Sell-to Customer Name	A J Schmidt		
Contract No.	234522	ZIP Code	

Sub Job No. J00020.001 has been created. Go to Sub Job?

Yes No

If you click on Yes, the system will take to the Sub Job created, see below. Within the sub job you can see the Job Class as the Sub Job and the master job from which the sub job has been created.

J00020.001 · Building Construction 110

Home Prices & Discounts WIP Job Navigate Report Analytics Actions Related Fewer options

General Show more

No.	J00020.001	DFR Nos.	
Description	Building Construction 110	External Document No.	
Sell-to Customer No.	10001	Blocked	
Sell-to Customer Name	A J Schmidt	Last Date Modified	10/13/2023
Contract No.	234522	Cust. PO No.	
Contract Date	12/31/2021	Cust. Job No.	
Contract For	Building Construction 110	Delivery Instructions	
Contract Type		Job Type	
Contract Sell Price	0.00	Gen. Prod. Posting Group	
Use Job Material Planning	<input checked="" type="checkbox"/>	Gen. Bus. Posting Group	LUMB
Job Est. Start Date		Locked Planning Lines Exist	<input checked="" type="checkbox"/>
Job Est. Completion Date		Job Purchaser	
Job Class	SubJob	Job Purchaser Name	
Sub-Level to Job No.	J00020	Forecast Method	Job Forecast by Task Code