

Working with Change Orders

Available in Sage 50 Premium Accounting and Higher

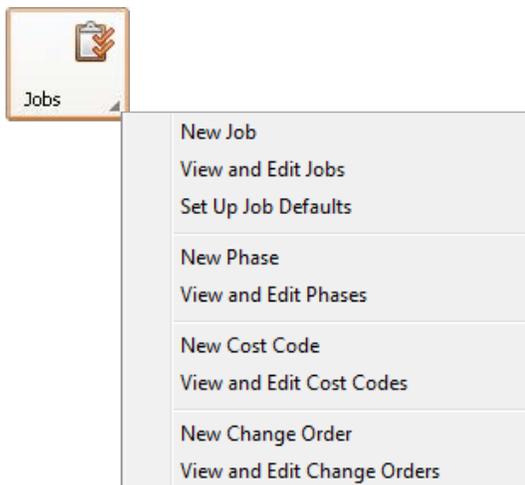
Quick Reference Guide

What is a Change Order?

A change order is a way for you to **keep track of changes to estimates for a job**. Using change orders helps you keep track of details such as when the estimate changed, how much it changed by, and who approved the change.

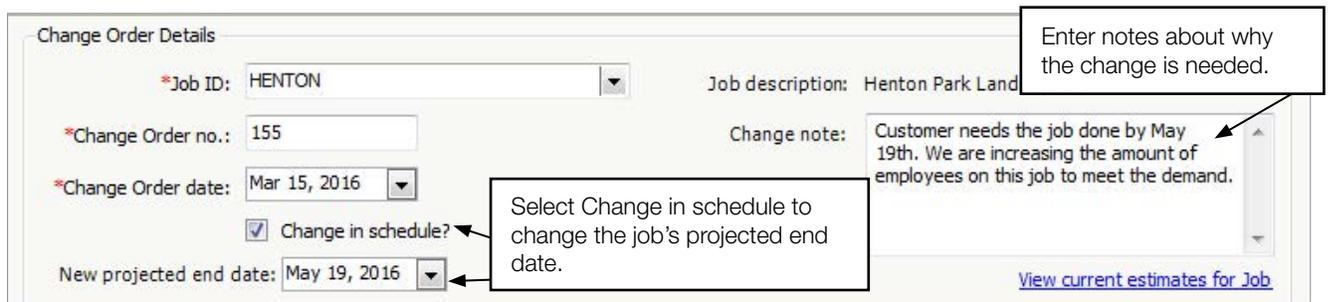
How do I access Change Orders?

Go to the Customers & Sales Navigation center, select Jobs, and then click New Change Order.



How do I use Change Orders?

1. Enter details about the change order such as Job ID, Change Order no, and Change Order date.



- Enter the change to estimated units, expenses, and revenues. The amount you enter here should be the amount that the current estimate is changing by. For example, if you have a current estimate of \$3000 and the new estimate is going to be \$4500, you should enter 1500 as the change amount. If you have a current estimate of \$1000 and the new estimate is going to be \$800, you should enter -200 as the change amount.

Change Amounts

Enter the amounts that the estimates are changing by, not new estimate amounts - see an [example](#).

Phase	Cost Code	Change Description	Change to Est. Units	Change to Est. Expenses	Change to Est. Revenues
07-Maintenance		Increased Employee Head Count	0.00	1,500.00	1,800.00
			0.00	0.00	0.00
Totals:				\$1,500.00	\$1,800.00

- The **change order must be approved** before the job estimates can be updated. Just check the Approved box. You can enter the Approved date and the name of the person who approved it.

Approved

Approved? Approved date: Mar 18, 2016 Approved by: John Smith

[Applied to transaction?](#)

Select **Applied to transaction** to keep track of change orders that have been applied to a proposal or invoice.

Click **Update Job Estimates** when you are ready to change the estimates and/or projected end date for the job.

Note: Once you click Update Job Estimates, you can no longer edit or delete the change order. You will need to create a new change order to make any other changes to the job estimates. If you are not ready to update the job estimates you can click Save and modify the change order at a later time.

Did you know?

- If you want to see the current estimates for the selected job, click the **View current estimates for Job** link located under the Change note field. This will take you to the job record.

[View current estimates for Job](#)

- You can print or e-mail change orders.** Select either Print or E-mail on the toolbar. When you send the change order to your customers, the form shows changes to estimated revenues and the projected end date.
- You can **view a list of change orders** by clicking List on the toolbar
- After you click Update Job Estimates and go back and view the change order, you will see Updates Applied to Job Estimates at the top of the window.

E-mail Attachments

Updates Applied to Job Estimates

For more info, visit: Sage.com
or contact us at 866-996-7243