

Change Orders

08/08/2025 4:13 pm CDT

Overview

Once a proposal is accepted, it becomes locked and cannot be edited. If the customer wishes to make changes, you will need to create a change order. A change order acts like a proposal but is attached to the original proposal and labeled as a "Change Order." This allows you to track the adjustments in relation to the original proposal.

This article will review:

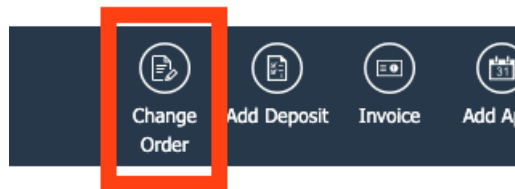
- [Create a Change Order](#)
- [Invoice the Change Order](#)
- [FAQs](#)

Video Tutorial

Create a Change Order

To create a change order, follow these steps:

1. **Select the Change Order icon** from the menu strip on the proposal.



2. **Enter the changes you want to make.**

- You will still need to select a service. You can:
 - Choose the same service as the original proposal (most common).
 - Select a different service, if that is more applicable to the change (i.e., additional scope of work).
 - Create a service specifically for change orders.
- Select any parts you need to add or subtract from the proposal.
 - Set a positive quantity to add parts.
 - Set a negative quantity to remove parts.

Create a Change Order for [Molly Baker](#)

Molly Baker
2308 Cleveland Ave | Saint Albans, WV 25177
Contact (000) 000-0000
Customer
Lead Source Internet

Settings

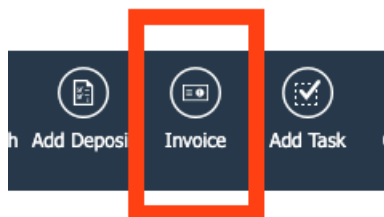
Date* 7/22/2024
Expires On* 10/20/2024
Rescission Days
Title
Customer Notes
Internal Notes

Option	Item	Description
Select a template...	Select a service...	
-option-	-part-	Search...

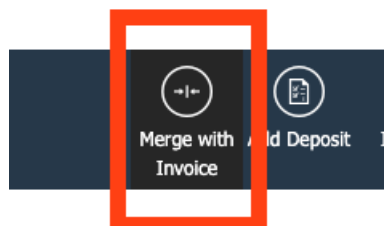
3. Send the change order to the client just like you would with a regular proposal. You will receive the same notifications when they accept the change order.

Invoice the Change Order

You can invoice the change order and collect payment as you would with any invoice



Alternatively, you can merge the change order invoice into the primary invoice for the proposal.



Which option you choose depends on the situation:

- If the customer has already paid the primary invoice, invoicing separately might be simpler.
- If the primary invoice is still open, you can merge the change order into it.

To ensure the change order displays correctly on the merged invoice, the service in the change order must match the original proposal/invoice. This will present the line items in a separate, concise section.

In the Customer View, any change orders will be displayed below the main proposal information, showing their

status and amount.

I N V O I C E													
Bob's Handyman - Plano 3308 Preston Rd 350 232 Suite 350-232 Plano, TX 75093 (860) 786-4121 www.serviceminder.co			bob's handyman										
Billing/Service Address Desdemona Newf 522 Caveson Dr Frisco, TX 75036 (805) 704-1325			<table><tr><td>Invoice #</td><td>2648</td></tr><tr><td>Date</td><td>October 06, 2023</td></tr><tr><td>Proposal</td><td>July 23, 2023</td></tr><tr><td>Balance Due</td><td>\$1,542.75</td></tr></table>			Invoice #	2648	Date	October 06, 2023	Proposal	July 23, 2023	Balance Due	\$1,542.75
Invoice #	2648												
Date	October 06, 2023												
Proposal	July 23, 2023												
Balance Due	\$1,542.75												
Prepared by Karen Libby (karen@serviceminder.com)													
Item	Description	Area	Quantity	Unit Price	Amount								
Build Stuff	I'm going to build something fabulous in your abode.		1	1200.00	\$1,200.00								
Change Order Adding Carpet Stuff to A Project 10/6/2023, accepted on 10/6/2023													
Area Rug	Clean an area rug		3	59.00	\$217.00								
Tile and Grout Clean	Steam clean tile and grout		300	0.80	\$240.00								
				Subtotal	\$1,657.00								
				Tax	\$0.00								
				Total	\$1,657.00								



Important Note:

If the original invoice was already reported for royalties, you should keep the change order invoice separate

FAQs

Why can't I apply a change order?

Change orders can only be added to accepted proposals. If the customer hasn't accepted the proposal yet, simply edit and save the existing proposal. The live proposal link will automatically update, and the customer will see the changes without needing a new link.

Why am I being asked to charge the customer's card again when I accept a change order?

This issue is typically caused by a checked box that requires a deposit. If this box is checked, you'll need to charge a deposit, which prompts the system to ask for payment details. To fix this, simply uncheck the "required" box for the deposit.

Why didn't the invoice progress wheel update after creating a change order?

The progress wheel may not update due to the steps in your workflow. This typically occurs when you:

1. Create a proposal
2. Invoice it
3. Create and invoice a change order
4. Merge the change order into the original invoice

In this scenario, the progress wheel may not reflect the update. As a workaround, you can re-invoice the original proposal, which will show the progress wheel with the updated overage percentage.
