

Change Orders

01/02/2025 11:54 am CST

Overview

Once a proposal is accepted, you can no longer edit it. If the customer wants to make changes, you can create a change order. A change order is just like a proposal but it's attached to the original proposal and labeled as a **Change Order**.

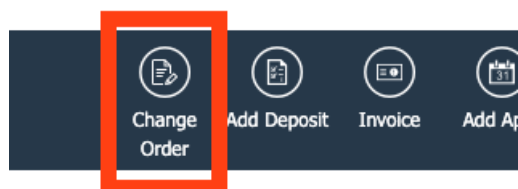
When change orders are part of a proposal, the Customer View will show those change orders (along with status and amount) below the main information.

Honeybadger Trap	for honeybadgers only - not monster or ghost approved	1	85.00	\$85.00
Change Order Vampire 7/22/2024 , accepted on 7/22/2024				
1. Disguise	required for sleuthing	1	25.00	\$25.00

Video Tutorial

Create a Change Order

To create a change order, click the **Change Order** icon in the menu strip on the proposal.



Put any changes you want, then save and send to the client as you would any proposal. You'll get the same notifications when they accept as for regular proposals.

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

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

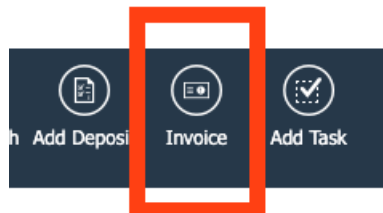
Settings

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

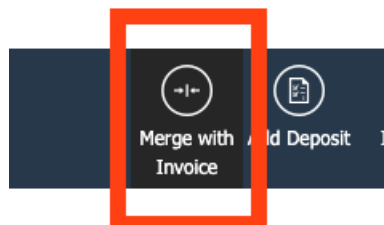
Option	Item	Description
Select a template...	Select a service...	
-option-	-part-	Search...

Once they accept:

1. You can then invoice the change order and collect payment like you would any invoice.



2. You can also take the resulting invoice and merge it into the primary invoice for the proposal.



Which route you take really is up to you. If the customer has already paid the primary invoice, it might be simpler to invoice separately. If the project is still underway and the primary invoice is still open, you can merge into that one.

To have the change order information display properly on the "merged into" invoice, remember that the change order must have the same service as the original proposal/invoice. When you create the change order this way, the line items show up in a nice, concise separate section:

INVOICE

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

Invoice #	2648
Date	October 06, 2023
Proposal	July 23, 2023
Balance Due	\$1,542.75

Prepared by Karen Libby (karenl@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



Another consideration for **Merging Invoices** for **Change Orders** is if the original invoice was already reported for royalties. If you have paid royalties on the initial invoice, then you should keep the invoice for the change order 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 the existing proposal and Save. The proposal link is a live link, so any changes you make and save will automatically appear in the Customer View (so you don't have to send the link again).

Can you explain how to correctly add a change order as a line item?

When creating the change order for a proposal, make sure to put in the line item that was being removed at a negative cost. Either the Quantity listed as -1 or the Price listed as a negative amount (-\$200).

Once this change order is complete with all of these items listed as negative numbers, then you can click Save (so it does not send to the customer), Accept on their behalf.

Troubleshooting

When I go to do a Change Order, it seems to now be forcing me to charge the customer's card again just to accept the change.

When creating the change order, there is a box that may be checked for requiring a deposit. If that is on, it means that you have to charge a deposit and will ask you to enter payment info. Make sure the deposit is not marked "required", and that should fix the problem.
