Change Orders

07/23/2025 11:11 am CDT

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 <u>Molly Baker</u>					
Leo	Contact Contact (000) 000-0000 Customer d Source Internet	Saint Albans, WV 25177			
Date*	7/22/2024				
Expires On*	10/20/2024				
Rescission Days					
Title					
Customer Notes					
Internal Notes					
O	ption	ltem	Description		
٤	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 how 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

bob's handyman

www.serviceminder.co

Billing/Service Address Desdemona Newf 522 Caveson Dr	Invoice #	2648	
Desdemona Newf 522 Caveson Dr	Date	October 06, 2023	
Frisco, TX 75036	Proposal	July 23, 2023	
(805) 704-1325	Balance Due	e \$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 Pro	ject 10/6/202	3, 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
					\$0.00
		1		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.

The invoice's progress wheel doesn't always update/show after I create a change order.

It maybe due to the steps of the workflow you are taking to create the change order. Typically, when you create a proposal, invoice it, create a change order, invoice the change order, and then merge the original invoice into the invoice that was created for the change order, the progress wheel won't show.

You may consider invoicing the original proposal again, the wheel will show but now with an overage in percentage.