





CHANGE ORDERS PLAYBOOK

REVISION DATE: MAY 28 2024

BuilderTrend #ChangeOrders #ProjectManagement
#ProjectControls

LOGIN TO BUILDERTREND

1. Open the applicable project.

Drafting a Change Order

1. Under the “Project Management” tab, select “Change Orders.”
2. On the right side, click the blue “+ Change Order” button.

CO ID#	Title	RFIs	Comments	Owner	Created Date	Files	Builder Cost	Owner Price	Approval Status	App
P24008-CB...	Added walk Bulletin #3	0	0	Kelsey Cannon	May 24, 2024, 10:0...		\$1,685.50	\$1,795.59	PENDING NOT RELEASED	
P24008-00...	Reframe at door 115 to wrapped ...	0	0	Kelsey Cannon	May 24, 2024, 9:42...		\$640.00	\$667.20	PENDING NOT RELEASED	
P24008-00...	Reframe walls	0	0	Kelsey Cannon	May 7, 2024, 11:34...		\$3,048.50	\$3,048.50	PENDING NOT RELEASED	
P24008-00...	Perimeter soffit at storefront	0	0	Kelsey Cannon	May 7, 2024, 9:04 ...		\$9,055.00	\$10,016.50	PENDING NOT RELEASED	
P24008-C...	Deduct Sound Batt Insulation	0	0	Kelsey Cannon	Apr 22, 2024, 11:0...		-\$1,718.00	-\$1,718.00	PENDING NOT RELEASED	
							\$12,719.00	\$13,810.79		

3. Enter the change order title in the “Title” box. The ID# will auto-assign based on the change order number in Buildertrend.
4. Set an approval deadline based on when the change order needs to be executed before work is completed.
5. Ensure the “Line Items” box is selected and check the “show line items to owner” checkbox.



6. Click the blue “+” icon under items.

P24008 Graeber & Co
Change Order

Change Order Information

Title * ID# P24008- (Auto Assign) Approval Deadline Owner Last Viewed Never

Price Information

Flat Fee ☐ Line Items ☒ Add From Catalog

☒ Show Line Items To Owner

Items	Cost Type	Unit Cost	Quantity	Unit	Builder Cost	Markup	Owner Price	M
Title <input type="text"/>	Cost Type <input type="text"/>	Unit Cost <input type="text" value="\$ 0.0000"/>	Quantity <input type="text" value="1.0000"/>	Unit <input type="text"/>	Builder Cost <input type="text" value="\$0.00"/>	Markup <input type="text" value="0.00"/>	Owner Price <input type="text" value="\$ 0.00"/>	Margin <input type="text" value="0.00"/>
Cost Code * <input type="text"/> <input type="button" value="Add"/> <input type="button" value="Edit"/>								
Description <input type="text"/>					Internal Notes <input type="text"/>			

7. Add an applicable title, cost type, and cost code that corresponds to the project estimate. Add a 30% markup on each line item unless otherwise directed.

8. **Note:** The description will show up on the owner change order. Internal notes will not.

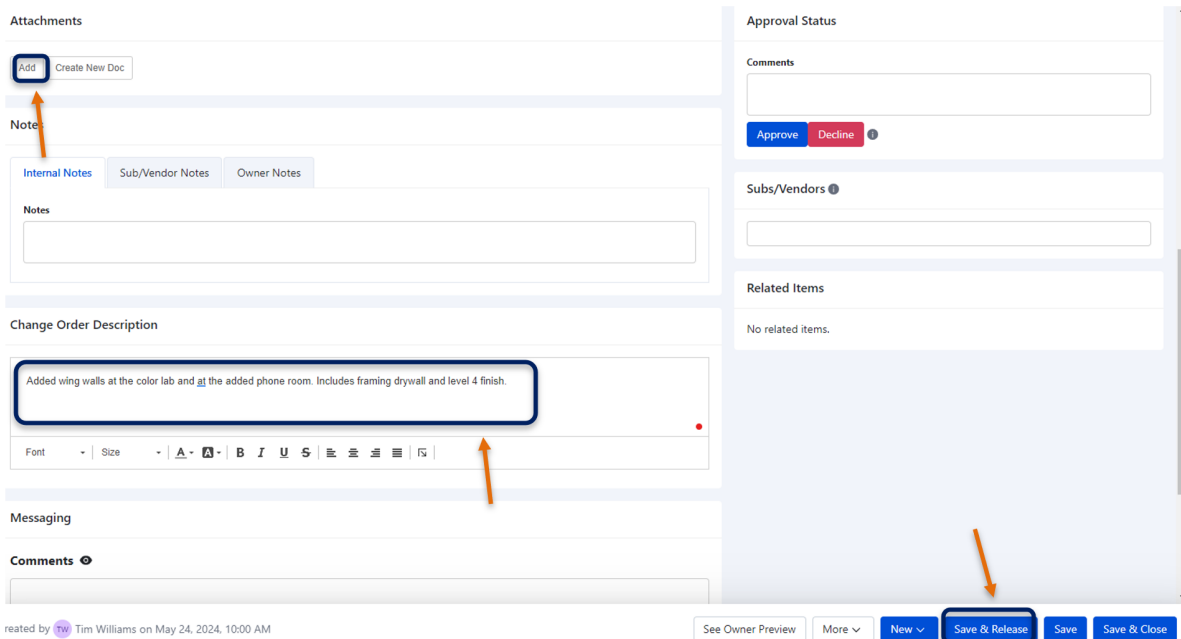
Items	Cost Type	Unit Cost	Quantity	Unit	Builder Cost	Markup	Owner Price	M
Title <input type="text" value="Additional Backing"/>	Cost Type <input type="text" value="Labor x"/>	Unit Cost <input type="text" value="\$ 50.0000"/>	Quantity <input type="text" value="4.0000"/>	Unit <input type="text"/>	Builder Cost <input type="text" value="\$200.00"/>	Markup <input type="text" value="30.00"/>	Owner Price <input type="text" value="\$ 260.00"/>	Margin <input type="text" value="23.08"/>
Cost Code * <input type="text" value="06 10 00 - Rough Carpentry"/> <input type="button" value="Add"/> <input type="button" value="Edit"/>								
Description <input type="text" value="Additional labor for backing. 4 hrs @ \$65/hr."/>					Internal Notes <input type="text"/>			

9. Select “add” to include any applicable attachments as backup. These will be included when releasing the change order to the owner.

10. Enter the change order description visible to the owner.

Sending a Change Order

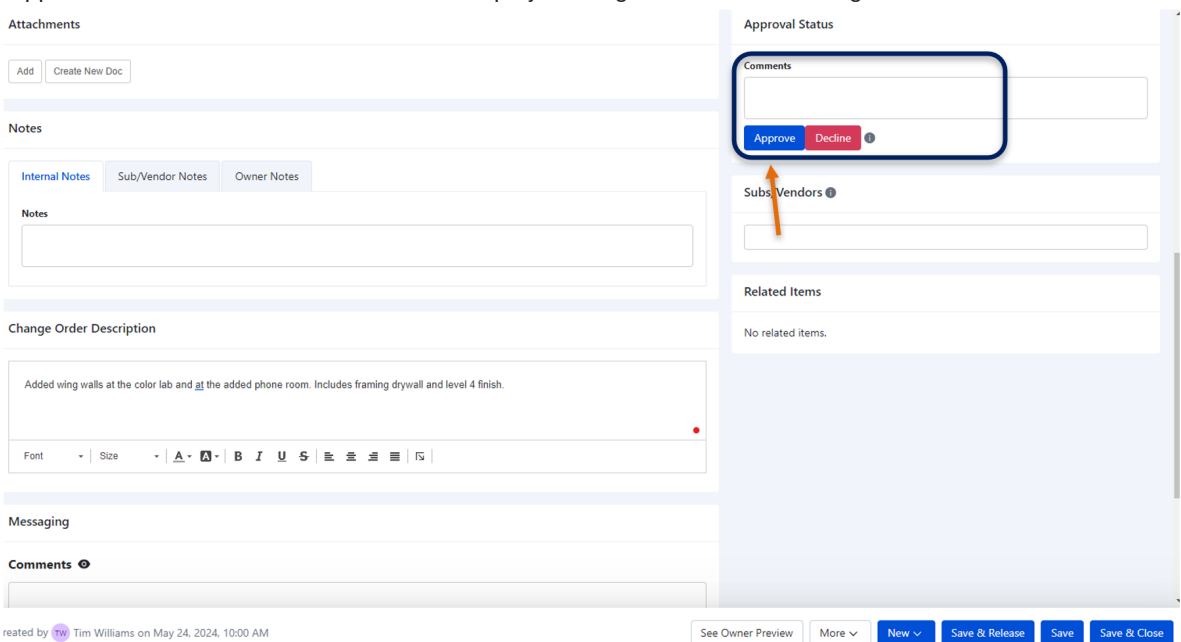
1. Click “Save & Release” at the bottom to send it to the owner. Ensure the “Notify owner” box is checked after releasing.



This screenshot shows the Buildertrend Change Order form with several annotations. An orange arrow points to the 'Add' button in the Attachments section. Another orange arrow points to the 'Save & Release' button in the bottom right corner. A third orange arrow points to the 'Approve' button in the Approval Status section. The form includes sections for Attachments, Notes (Internal, Sub/Vendor, Owner), Change Order Description, Messaging, and Comments. The Change Order Description contains the text: 'Added wing walls at the color lab and at the added phone room. Includes framing drywall and level 4 finish.' The bottom of the form shows the user 'Tim Williams' and the date 'May 24, 2024, 10:00 AM'.

Documenting a Change Order

1. Once the owner signs the change order, open the approved change order in Buildertrend and click the "Approve" button. This action will add it to the project budget and allow for billing.



This screenshot shows the Buildertrend Change Order form with the 'Approve' button in the Approval Status section highlighted with a blue box and an orange arrow. The form includes sections for Attachments, Notes (Internal, Sub/Vendor, Owner), Change Order Description, Messaging, and Comments. The Change Order Description contains the text: 'Added wing walls at the color lab and at the added phone room. Includes framing drywall and level 4 finish.' The bottom of the form shows the user 'Tim Williams' and the date 'May 24, 2024, 10:00 AM'.

2. Go to "files" at the top of the home screen and select "Documents."
3. Open the folder titled "1. Owner Documents" and "Owner Change Orders."
4. Upload the executed owner change order titled with the project number_change order description_change order number_EXEC.



5. Example: P24008_Additional Backing_CO#001_EXEC

The screenshot shows a software interface with a top navigation bar containing 'Files', 'Messaging', 'Financial', and 'Reports'. A search bar is on the right. The 'Files' menu is open, showing 'Documents', 'Photos', and 'Videos'. A callout box labeled '1. Owner Documents' points to the 'Documents' menu item. Below the menu, a table lists documents:

	Viewable By	Modified	Added	Contents	Actions
<input type="checkbox"/> Executed Proposal		Feb 23, 2024, 8:48 AM	Feb 23, 2024, 8:47 AM		⋮
<input type="checkbox"/> OAC Meetings		Feb 23, 2024, 8:47 AM	Feb 23, 2024, 8:47 AM		⋮
<input type="checkbox"/> Owner Change Orders		Feb 23, 2024, 8:47 AM	Feb 23, 2024, 8:47 AM		⋮
<input type="checkbox"/> Owner Contract		May 3, 2024, 11:47 AM	Feb 23, 2024, 8:47 AM	📎	⋮
<input type="checkbox"/> Pay Apps		Feb 23, 2024, 8:47 AM	Feb 23, 2024, 8:47 AM		⋮

This document is controlled and maintained by OVI General Contracting's compliance department.

Document ID	Document Name	Version	Author	Date Created	Reviewer	Status
		0.5		6/4/2023		DRAFT

The current version is as of the date issued above. Any amendments to this policy will be distributed promptly and will supersede any previous versions.

OVI General Contracting

RCE-66400 | OVI GENERAL CONTRACTING LLC

800 W Main St, Ste 1460, Boise, ID 83702 | (208) 593-3223 | www.ovi-gc.com