

Change Orders

User Guide

Create and document change orders when project scope shifts — track reason codes, cost impact, and generate client-ready PDFs.

Quick Reference

Command: /changeorder

Access: All paid users

Output: Branded PDF change order document

Tracking: Change orders linked to active jobs

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1. Getting Started

Change orders are a reality on every access control project. When a client adds doors, changes hardware, or the existing conditions don't match the original scope, you need documentation. The /changeorder command creates a formal record with reason codes and cost tracking.

Type /changeorder to start. If you have active jobs, the bot asks which job the change order applies to.

2. Creating a Change Order

The bot walks you through each field:

- Job selection — pick from your active jobs or enter a job name
- Change description — describe what changed and why
- Reason code — select from standard industry reasons
- Cost impact — additional labor hours, materials, equipment
- Schedule impact — how many days added or removed
- Client approval — whether the client has already approved verbally

Note: Always document change orders before doing the additional work. A change order created after the fact is much harder to get approved and paid.

3. Reason Selection

The bot offers standard reason codes that cover most access control scenarios:

Client-requested	Customer wants additional doors, readers, or features
Field conditions	Existing conditions differ from drawings or survey
Design change	Architect or engineer revised the specification
Code compliance	AHJ requires additional hardware for fire/life safety
Equipment substitution	Specified hardware unavailable, equivalent needed
Scope clarification	Original scope was ambiguous, needs formal definition

Select the reason that best fits. If none apply, choose "Other" and provide a custom reason description.

4. Scope Changes

The scope section captures what's being added, removed, or modified:

- Added items — new doors, readers, controllers, cabling runs
- Removed items — equipment no longer needed
- Modified items — hardware swaps, spec changes, re-routes
- Labor impact — additional technician-hours required
- Material cost — dollar amount for new materials

Tip: Be specific about quantities. "Add 3 HES 9600 strikes to doors 204, 205, 206" is much better than "add some strikes."

5. PDF Output

After confirmation, the bot generates a branded PDF change order that includes:

- Your company name, logo, and branding colors
- Change order number (auto-incremented per job)
- Original scope reference and change description
- Reason code and detailed justification
- Cost and schedule impact summary
- Signature lines for technician and client approval

Send the PDF to your project manager or email it to the client for formal approval.

6. Quick Reference

Start change order	Type /changeorder
Cancel mid-flow	Type /cancel
Link to job	Select from active jobs list
PDF output	Auto-generated after confirmation
Reason codes	Client-requested, field conditions, design change, code, substitution