

How to Create a Change Order

Summary

This tutorial covers how to create and manage change orders in BuilderPal to document scope, cost, or schedule changes, ensuring project alignment, budget updates, and stakeholder approvals.

Prerequisites

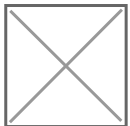
- Role or permission needed
- An active project set up in BuilderPal
- Relevant details like change description, cost impact, and approvals ready

Steps

There are two ways to create a change order in BuilderPal: from the project overview or from the Actions tab.

Method 1: From the Project Overview

1. **Log in to BuilderPal and select your project.** — Open the BuilderPal app, enter your credentials, and choose the project from the dashboard.
2. **Click New** in the top right, and select the **Actions** drop down
3. **Select Change Order.** from the dropdown options to open the change order creation interface.



Method 2: From the Actions Tab

1. **Navigate to your project.** — Log in to BuilderPal and select the desired project from the dashboard.
2. **Go to the Actions tab.** — On the left sidebar, click **Actions** to open the actions overview.
3. **Click the + New button.** — In the top right corner of the Actions screen, click the **+ New** button to open the add action menu.
4. **Choose Change Order.** — From the dropdown menu, select **Change Order** to start creating a new change order.

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5. **Enter change order details.** — Fill in the description, reason for change, cost adjustments (additions/deductions with cost codes), schedule impact, affected parties, attachments, and approval workflow.

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6. **Preview and save the change order.** — Click **Preview** to review, then **Save** or **Submit for Approval** to notify stakeholders.

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Confirmation

You'll know it worked when the change order appears in the Actions overview, and approvers receive notifications for review.

FAQ

Q: What information is required for a change order? A: Description, impact on cost/schedule, supporting documents, and approver assignments.

Q: Can change orders be rejected or revised? A: Yes, during approval, they can be sent back for revisions or rejected with comments.

Q: How do change orders affect the project budget? A: Approved changes automatically update the budget and can link to new purchase orders or bills.

Q: What if a change order involves subcontractors? A: Assign them as parties and include their quotes as attachments for transparency.

Q: Are change orders auditable? A: Yes, full history including approvals and revisions is tracked in the project logs.

Related Articles

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- [Bills](#)
- [RFIs](#)

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