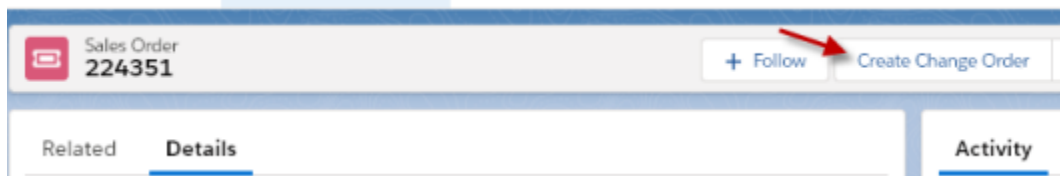


CX Change Order Workflow

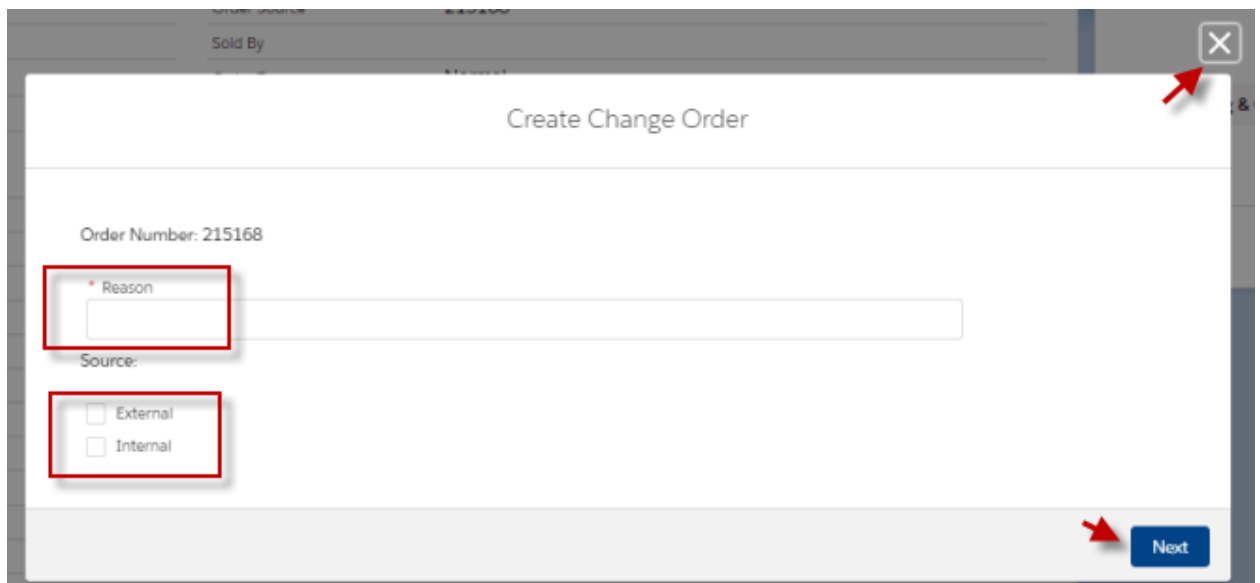
This document describes the creation and approval process in Salesforce for changes on processed CX Orders. Once orders are processed, any changes must have the approval of Purchasing and Scheduling departments. Orders over 48 hours old must also have the approval of the respective Sales Manager.

Create a Change Order

In Salesforce, open the Sales Order to be changed and click on the *Create Change Order* button on the top right.



In the pop-up window, enter the reason for the change, and whether the change is an Internal (Durabuilt) or External (customer) request. To cancel, click the X button. To create the Change Order, click *Next*.



After clicking *Next* a new CX Change Order page will appear:

CX Change Order CX-00004

CX Change Order Name	CX-00004	Level One Approver	Nigel Attrill
Account	Signature Homes	External Request	<input type="checkbox"/>
Opportunity	416 Cherrywood	Internal Request	<input checked="" type="checkbox"/>
Sales Order	221329	Original Order Total	\$6,676.08
Status	Not Submitted	Admin Charge	\$0.00
Order Age	29.22	Change to Order Total	\$0.00
Change Reason	This is the reason for the change request. This is the reason for the change request.	New Order Total	\$6,728.08
Created By	Barry Hicks, 11/3/2020 1:25 PM	Last Modified By	Barry Hicks, 11/4/2020 4:15 PM

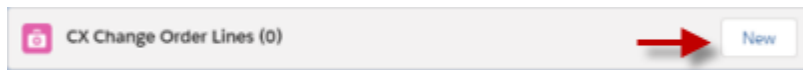
CX Change Order Lines (0) New

Field descriptions:

- Change Order Name: this is the auto-generated unique number for this Change Order. Not editable.
- Account: populated from the Sales Order. Not editable.
- Opportunity: populated from the quote that created the order. If there is no opportunity, this field will be blank. Not editable.
- Status: status related to the approval process. Change by the system. Not editable.
- Order Age (Hours): since order was created. Changes on orders over 48 hours require a manager's (Level One Approver) approval.
- Change Reason: as entered in the New CX Change Order pop-up screen. Can be edited.
- Level One Approver: the manager of the owner of the Sales Order.
- External Request: request initiated by customer.
- Internal Request: request initiated by internal user.
- Original Order Total: total amount of the current order before changes. This will automatically be populated from the order.
- Admin Charge: additional fee we are charging the customer to make this change, if any.
- Change to Order Total: the sum of the difference of all line changes.
- New Order Total: the total of the order after changes and after application of admin charge, if any.

[Create Change Order Line\(s\)](#)

To enter the line(s) on the order requiring changes, click on the *New* button in the Change Order Lines section.



A new CX Change Order Line window will pop-up.

New CX Change Order Line

Information

* CX Change Order

CX Change Order Line Name

* Line Number

* Quantity

* Change Details

* Original Amount

* New Amount

Field descriptions:

- CX Change Order: the Change Order associated with this line item.
- CX Change Order Line Name: the auto-created, unique number for this line item. Will be populated after save.
- Line Number: the CX Order Line Number that requires a change. Mandatory.
- Quantity: number of units on the order line. Mandatory.
- Change Details: what changes are being made. Mandatory.
- Original Amount: the net amount of the line item BEFORE changes. Mandatory.
- New Amount: the net amount of the line item AFTER changes. Mandatory.

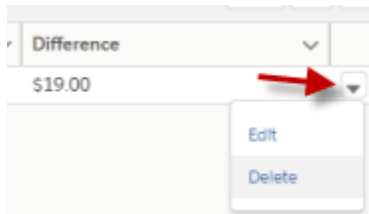
Click *Save* to finish or *Save & New* to create another line. After save, you will see the new line item page. This will include a *Difference* field with the calculation of new amount minus original amount. Click on the CX Change Order link to return to the Change Order. You can enter more lines, as appropriate.

CX Change Order Line
CXL-00002

Related **Details**

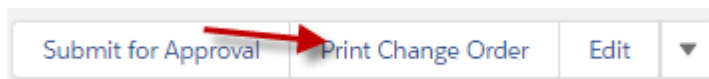
CX Change Order	CX-00004
CX Change Order Line Name	CXL-00002
Line Number	500
Quantity	1
Change Details	Line item change details.
Original Amount	\$550.00
New Amount	\$600.00
Difference	\$50.00
Created By	Barry Hicks, 11/3/2020 3:00 PM

To edit a line, click on the dropdown arrow and select *Edit*. To delete the line, click *Delete*.



Print Change Order

The Change Order can be printed for signature and file insertion. Click on the *Print Change Order* button.

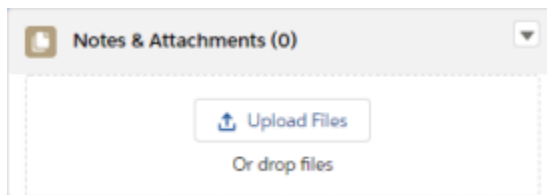


Included in the print out will be a summary of the order amount changes.

Original Order Total:	\$6,676.08
Change to Order Total:	(\$17.00)
Admin Charge:	\$100.00
New Order Total:	\$6,759.08

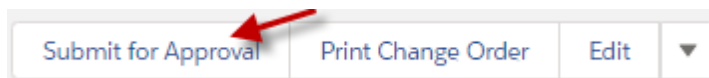
Attachments

To attach any supporting documents, use the *Notes & Attachments* section.



Submit for Approval

Once the Change Order is complete, click on the *Submit for Approval* button. Once submitted, the change order will be locked and cannot be changed.



Manager Approval

If the Sales Order is over 48 hours old, an approval will be required from the Sales Order owner's manager. The status of the change order is set to *Awaiting Manager Approval*.

If under 48 hours, the approval process begins with Purchasing.

Purchasing Approval

A request for approval will go to a Purchasing to validate changes to special order items, if any. The status of the change order is set to *Awaiting Purchasing Approval*.

Scheduling Approval

If approved by Purchasing, the approval will move to Scheduling to verify the order changes against production scheduling. The status of the change order is set to *Awaiting Scheduling Approval*.

Final Approval

If Scheduling approves, the change order process is complete, and an approval email will go to the requestor and Sales Order owner. The status of the change order is set to *Approved*.

Rejection

If the change order is rejected at any time during the approval process, a notification email will go to the requestor and Sales Order owner, the Change Order will be unlocked allowing for modification and the status of the change order is set to *Rejected*.