

CHANGE ORDER MANAGEMENT



CHANGE ORDER FOR WINDOWS

From The Nations Leader in Estimating Software!

McCormick's Change Order for Windows is a simple solution for knowing the exact status of all your change orders. Instantly identify how a single or all change orders will affect your bottom line.

Highlights Include:

- Ability to interface with McCormick estimating program or operate as a stand alone module
- Minimize rejections and expedite approval process
- Organize and standardize all change orders
- Single or multi-user
- Cash flow forecasting
- Change order "Alerts"
- Quick view area
- Customizable screens
- Auto or custom numbering
- User definable reports

Change Order for Windows

File Edit View Help

Job Name: Acme Building CO Description: Install five switches in room 167

Job Cost: \$834,000 Price Pending: \$0 Returned Rejected: \$150

Returned Received: \$104 Price + Approved: \$982,125

Proposal Number	Change Number	Internal Number	Date Received	Percent Accepted	CO Status	Status Date	Alert Date	CO Price	CO Cost	CO Return	CO Hours	Estimator
1	1	1	08/28/98	95	Billed	10/06/98	10/02/98	\$22,200	\$17,600	\$4,600	296	Jack
1	1	1	08/28/98	95	Billed	10/06/98	10/02/98	\$22,200	\$17,600	\$4,600	296	Jack
4	3	18	08/29/98	95	Approved	10/06/98	09/22/98	\$1,200	\$840	\$360	15	Mike
32	5	13	09/07/98	50	Pending	10/06/98	10/30/98	\$250	\$120	\$130	2	Jack
33	6	17	09/12/98	75	ReSubmitted	10/06/98	10/08/98	\$900	\$600	\$300	10	Mike
34	7	44	09/17/98	95	Approved	10/06/98	10/05/98	\$6,700	\$5,360	\$1,340	89	Jim
35	8	46	09/22/98	95	ReSubmitted	10/06/98		\$12,000	\$9,250	\$2,750	154	Jack
36	9	47	09/22/98	75	Received	10/06/98		\$9,200	\$7,360	\$1,840	122	Jack
37	10	21	09/24/98	80	Submitted	10/06/98	10/07/98	\$450	\$300	\$150	5	Mike
38	11	23	10/08/98	90	Received	10/06/98	10/20/98	\$0	\$0	\$0	0	ADMIN

Change Order Totals

	Total	Approved	Pending	Disputed	No Charge	ReSubmitted	Rejected	Submitted	Billed	Tabled	Received
CO Price	\$75,100	\$7,900	\$250	\$0	\$0	\$12,900	\$0	\$450	\$44,400	\$0	\$9
CO Cost	\$59,030	\$6,200	\$120	\$0	\$0	\$9,850	\$0	\$300	\$35,200	\$0	\$7
CO Return	\$16,070	\$1,700	\$130	\$0	\$0	\$3,050	\$0	\$150	\$9,200	\$0	\$1
CO Hours	989	104	2	0	0	164	0	5	592	0	

Jobs Details Alerts Reports Options New Save Delete Close

TO GET STARTED CALL:

1-800-444-4890

480/831-8914 • 480/820-2422 (fax)

149 West Boston • Chandler, Arizona 85225 • www.mccormicksys.com



Change Order for Windows

Job Name: Acme Building CO Description: Cor Number One

Job Cost: \$334,000 Price Pending: \$0 Returned/Rejected: \$159

Returned Received: \$104 Price Approved: \$42,125

Proposal Number	Change Number	Internal Number	Date Received	Percent Accepted	CO Status	Status Date	Alert Date	CO Price	CO Cost	CO Return	CO Hours	Estimator
1	1	09/27/98	95	Billed	10/06/98	10/02/98		\$22,200	\$17,000	\$4,000	296	JACK
11	1	08/26/98	95	Billed	10/06/98	10/02/98		\$22,200	\$17,000	\$4,000	296	JACK
43	18	08/26/98	95	Approved	10/06/98	10/25/98		\$1,200	\$540	\$360	15	MARIE
32	5	09/17/98	50	Pending	10/06/98	10/30/98		\$250	\$120	\$120	2	JACK
20	12	09/17/98	75	ReSubmitted	10/06/98	10/06/98		\$50,000	\$30,000	\$10,000	10	JACK
34	7	09/17/98	95	Approved	10/06/98	10/06/98		\$6,200	\$5,360	\$1,340	89	JIM
37	10	09/24/98	80	Submitted	10/06/98	10/07/98		\$950	\$700	\$150	1	JACK
36	11	09/23/98	95	Received	10/06/98	10/29/98		\$0	\$0	\$0	0	ADMIN

Change Order Totals

CO Price	Approved	Pending	Disputed	Re-Submitted	Rejected	Submitted	Billed	Tabbed	Return
\$53,900	\$7,500	\$559	\$0	\$0	\$593	\$0	\$450	\$44,900	\$0
\$46,400	\$4,700	\$129	\$0	\$0	\$693	\$0	\$300	\$35,299	\$0
\$11,400	\$1,700	\$139	\$0	\$0	\$109	\$0	\$150	\$8,289	\$0
CO Hours	713	104	2	0	19	0	5	592	0

Alerts So you don't forget!

Every change order has the option to be given an alert date. This alert date is a call for action. In Alert mode, only the change order(s) that have been tagged for an alert will be visible. The Change Order Management alert feature can be set to come up automatically each time you enter the program or, can be accessed by pressing the "ALERT" button on the bottom of the form.

Change Order for Windows

Job Name: Acme Building CO Description: Cor Number One

Job Cost: \$334,000

Returned Received: \$104

Change Order Details

Proposal Number: 1
Change Number: 1
Internal Number: 1
Date Received: 09/27/98
CO Description: Cor Number One
First time

Percent Accepted: 95
Status Date: 10/06/98
Alert Date: 10/02/98
CO Price: \$22,200
CO Cost: \$17,000
CO Return: \$4,000
CO Hours: 296
Estimator: JACK

Reports Close

Change Order Totals

CO Price	Approved	Pending	Disputed	Re-Submitted	Rejected	Submitted	Billed	Tabbed	Return
\$53,900	\$7,500	\$559	\$0	\$0	\$593	\$0	\$450	\$44,900	\$0
\$46,400	\$4,700	\$129	\$0	\$0	\$693	\$0	\$300	\$35,299	\$0
\$11,400	\$1,700	\$139	\$0	\$0	\$109	\$0	\$150	\$8,289	\$0
CO Hours	713	104	2	0	19	0	5	592	0

Vertical layout ..To keep things simple!

When setting up a new change order, information can be entered directly onto the change order "Top Page" or if you are more comfortable working down a list, just select "Details" and then enter your data straight down your list. You make the choice!

Change Order for Windows

Job Fields: Formulas: CO Fields: Table Fields:

Job Number: 2
Job Name: Acme Building
Customer Name: Bill Construction
Contractor Name: Contractor Contractor Telephone Number: (206)638-3714

Job Price: \$982,000 Job Cost: \$834,000 Job Return: \$148,000 Job Hours: 13,211

Price + Approved: \$982,125 Price + Approved + % Pending: \$0

Proposal Number	Change Number	Internal Number	Date Received	Percent Accepted	CO Status	Status Date	CO Alert	CO Price	CO Cost	CO Return	CO Hours	Estimator
1	1	09/23/98	95	Billed	10/06/98	10/02/98		\$22,200	\$17,000	\$4,000	296	JACK
11	1	09/23/98	95	Billed	10/06/98	10/02/98		\$22,200	\$17,000	\$4,000	296	JACK
4	382	1926	08/23/98	95	Approved	10/06/98	09/23/98	\$1,200	\$540	\$360	15	MARIE
32	5	13	09/07/98	50	Pending	10/06/98	10/30/98	\$250	\$120	\$120	2	JACK
33	6	17	09/12/98	75	ReSubmitted	10/06/98	10/06/98	\$500	\$600	\$300	10	JACK
34	7	44	09/17/98	95	Approved	10/06/98	10/06/98	\$6,200	\$5,360	\$1,340	89	JIM
35	8	46	09/22/98	95	ReSubmitted	10/06/98		\$12,000	\$9,250	\$2,750	10	JACK
36	9	47	09/22/98	75	Received	10/06/98		\$9,200	\$7,260	\$1,840	10	JACK
37	10	23	09/24/98	80	Submitted	10/06/98		\$950	\$700	\$150	1	JACK
38	11	23	10/03/98	90	Received	10/06/98	10/29/98	\$0	\$0	\$0	0	ADMIN

Change Order Totals

OK

Reports Back up your change order with documentation!

McCormick's Change Order for Windows gives you the ability to use templates to build reports and letters. The template is the body of the letter. After choosing a letter, the rest of the information is automatically put in its place.



" Multi-User "

StandardizeTo develop consistency!

By standardizing your change order process you will develop consistency and professionalism for your organization. Change Order for Windows will quickly become an asset for you and your customer base.

1-800-444-4890

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