

## 4 Change Order or Change Request Order



Salesforce/Certinia  
For PS, Finance and Sales

### Reference Guide: Title

For PS, Finance and Sales

#### Purpose:

Description of purpose

<b>Original SOW Number:</b>	Opp Id.	<b>Project Manager</b>	Enter PM Name
<b>Customer Name:</b>	Click or tap here to enter text.	<b>Change Requested By</b>	Click or tap here to enter text.
<b>Project Name:</b>	Click or tap here to enter text.	<b>Cost of Change Request</b>	\$/Euro
<b>Customer Project Sponsor:</b>	Click or tap here to enter text.	<b>Version</b>	Click or tap here to enter text.



# Table of Contents

1	Purpose of a Change Request .....	1
2	Nature of Change .....	2
3	Change Description .....	2
4	Impact.....	2
5	Services Estimation .....	2
6	Assumptions .....	2
7	Additional Comments.....	3
8	Signatures Required .....	3
9	Appendix .....	3



# 1 Purpose of a Change Request

The purpose of a change request is to provide a formal process for proposing, evaluating, and managing changes to the project's scope, deliverables, requirements, or any other aspect, ensuring effective scope control, risk management, stakeholder engagement, and maintaining accountability through documented decision-making.



## 2 Nature of Change

This change is a result of (check all that apply):

- New requirements/functionality not identified in original Statement of Work (SOW)
- New deliverables not identified in original SOW
- Additional hours for tasks defined in original SOW
- Additional customizations

## 3 Change Description

<Use this section to define what caused the change, what the change entails, and any other pertinent details that will help the customer understand the change.>

## 4 Impact

The following defines the impact of the change on the project.

<b>Schedule Impact:</b>	<Define any changes to the schedule, including delays or phases that will be added to the project.>
<b>Budget Impact:</b>	<Define any impact to the budget. Even though a change order implies automatically that there is a change in budget, use this area to define how this will impact the budget management for the project going forward.>
<b>Scope Impact:</b>	<Define how this change will impact the scope that has been defined for the project.>
<b>Overall Impact:</b>	<Define the overall impact to the project.>

## 5 Services Estimation

The estimated hours and fees are listed in the table immediately below. The work effort provided is time and materials and an estimate only. Actual time consumed will be invoiced.

<b>Change Order</b>	<b>Rate</b>	<b>Hours</b>	<b>Budget Impact</b>
<description>	<Rate>	<no. of hours>	<impact on existing project budget>

## 6 Assumptions

List any assumptions made when creating this change order:

- This change order must be signed by <Click or tap to enter a date.> to be included in the current timeline.
- This change order is only good for 30 days of receipt of this change order and will be considered expired if not signed within 30 days. Requoting will be done if the change is still needed.
- If at any point, it appears as though the change order's Estimation at Completion (EAC) exceeds the estimated fees in the change order by 20% a new change order will be initiated to outline changes in the timeline, scope and/or estimates.
- If this change order includes custom development be advised a 24% lifecycle management fee will be charged yearly.
  - This estimation includes the following activities for the customization requested:
    - Development & Source Control
    - Quality Assurance, Deployment and Walkthrough of Customization
    - Project Management and Administration
    - Meetings and Documentation
- Assumption 1
- Assumption 2
- Assumption 3



## 7 Additional Comments

Add any additional comments that will assist in defining the change.

## 8 Signatures Required

Client		Aptean Inc.	
By:		By:	
Name:		Name:	
Title:	Client Project Sponsor	Title:	Service Leader
Date:		Date:	

## 9 Appendix

Change Revision Tracking

Change No.	Date	Change Revision	Author
001	Enter a date.		

