

# Cancelling Orders in Praxis

If an order is cancelled, the process by team that occurs is as follows:

## Sales Manager

1. Make a negative entry in the Building Order Sheet to credit the price of the unit by creating a redline stating which serial numbers were cancelled. In the example below, only one of the two units in the run of units was cancelled so the serial number was noted, and half of the total price was credited. If both were cancelled, the total price would be credited.

The screenshot shows a software interface for managing building orders. At the top, it displays 'Serial Number 25240-25241', 'Quote Number: NW-0156-2024', and 'Total Price: \$242,158.00'. Below this, there's a 'Notes And Options' section with buttons for 'Add New' and 'Spell Check'. On the right, there are 'Save' and 'Close' buttons. The main area contains a table with a single row. The table has columns for 'Description', 'Price', 'Factor', and 'Factor Price'. The 'Description' column contains the text '25240 Cancelled by Customer'. The 'Price' column shows '\$121,079.00', the 'Factor' column shows '0.00', and the 'Factor Price' column shows '\$121,079.00'. A note at the top of the table says 'Note: If Factor >0 Then Factor Price=(Price\*1.02)/Factor'. There are also 'Build' and 'Change Order' buttons at the bottom of the table.

Description	Price	Factor	Factor Price
25240 Cancelled by Customer	\$121,079.00	0.00	\$121,079.00

2. Attach the Redline Change Order Sheet and email Jay Daniels, Jay Vanvlerah, the factory GM, and the factory PC stating:
  - a. Serial numbers cancelled,
  - b. Customer PO # affected,
  - c. Affect on revenue numbers,
  - d. Reason for cancellation.
  - e. Any reason we shouldn't give a full refund and suggestion on refund amount (design costs, materials ordered, etc.)
3. Amend the Redline Change Order according to Jay Vanvlerah and Jay Daniels suggestion.
4. Once the Redline Change Order is signed, save the email and signed document in the building folder and files.
5. Remove the serial number(s) from the Pipeline Report.
6. Alert internal teams through standard Redline Change Order process.

## Project Coordinator

1. Mark status as “canceled” for that unit in the Project Log.

## Project Coordinator & General Manager

1. Review reports together to ensure the info provided is correct in the project log.

## General Manager

1. Submit reports to Devin or manager.

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**From:** Jay Daniels <[jay.daniels@sunbeltmodular.com](mailto:jay.daniels@sunbeltmodular.com)>

**Sent:** Wednesday, June 4, 2025 9:19 AM

**Subject:** Praxis data input-GM's, VP's and PC's

To all:

It is imperative that we keep the data in Praxis correct and up to date. There are many reports that are pulled from the data in the system for analysis and planning purposes. We have had a few "hiccups" lately that we need to address. This occurred for canceled units or units moved to another plant. Please follow these steps when canceling or moving units:

**Sales VP's**-When a unit is canceled or moved, please have the sales rep do a negative entry on the Building Order Sheet to credit the price of the unit and note the cancellation in the line item for the reverse charge. If a building is canceled that is in a run of units, simply note the specific serial number that is deleted and do a reverse \$ entry for that unit only. Always notify the GM and Project Coordinator and me immediately (in writing) when this occurs. Please review this process with your sales teams.

**Project Coordinators**- When notified by sales that a unit has been canceled, please mark status as "canceled" for that unit in the Project Log. This will relieve the \$ amount from the backlog. It is also important to keep all other entries up to date for tracking purposes inclusive of customer and state submittals, etc.

**GM's**- Please make sure to review reports with your project coordinators prior to submitting. We need to ensure that the info provided is correct.

We are here to help if you have any questions or run into any difficulties. Please feel free to reach out with any questions or concerns.

Thank you,

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