How to Create Markups for a Custom PDF Request

Why is a Markup required?

To incorporate your specific PDF into your Procore account, the Custom Solutions team must reset all formatting and link all the information. As such we need to know:

1. What fields from Procore you want to have populate on your PDF (field name and field location)
2. Where on the PDF that information populates
3. Any additional functionality desired on your PDF and where that would be.

To best share this with the techs who will be building your forms, please follow the below instructions to provide the clearest markup possible. Please note, that it is recommended to submit one Tool's request at a time. This will ensure your custom hours are first used with the request that holds priority.

Apply Markup to an Existing PDF Form

Instructions on how to markup an existing Procore Standard PDF or an Existing Custom Form that you would like to tweak. Typically these are small changes, removing fields or adding plain text verbiage.

Apply Markup to a New Build Custom PDF Form

Instructions on how to markup a brand new build that you would like to fully replace an existing Procore PDF. These custom PDFs have a different aesthetic to Procore's default PDFs and the verbiage tends to be more extensive.

Create Custom Fields and Create/Apply Fieldsets

Custom Solutions does not create user-facing custom fields. After the fields are created and applied to a fieldset, Custom Solutions can assist with mapping these fields to PDF templates.

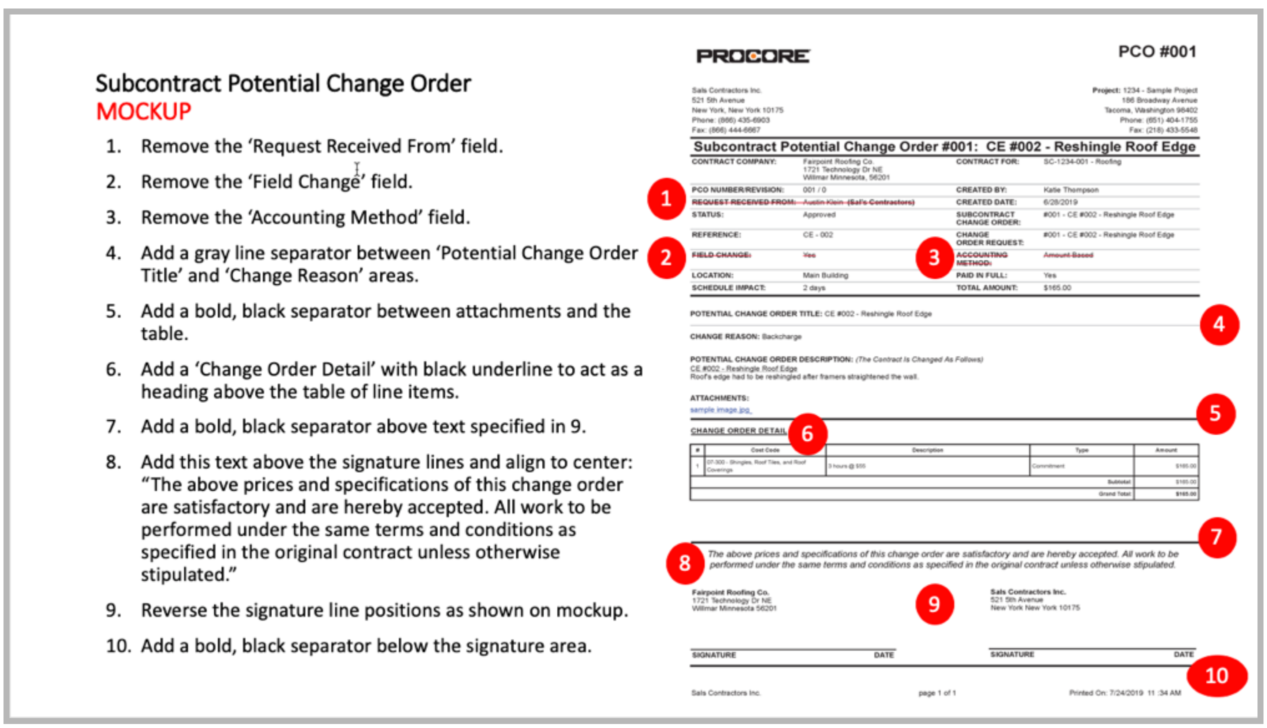
How to Apply Markup to an Existing PDF Form

Steps

1. Export and Download the existing single-item PDF from Procore.
2. Choose your markup tool of choice.
    a. To learn how to add markups to a PDF file using Adobe Acrobat (markups can also be added using Adobe's Acrobat Reader Free version), see Use Annotation and Drawing Markup Tools to Add Comments in PDFs on the Adobe website.
    b. To learn how to add markups to a PDF file using Bluebeam, see one of the videos about Markup Tools on the Bluebeam website.
    c. To add callouts to your markup, try inserting an image in Microsoft PowerPoint and then adding shapes that correspond to each modification.
3. Markup the PDF and clearly notate the modifications you would like to make.

EXAMPLE

In this example, the request is to modify one of the default PDF forms that can be exported from a Procore tool. Callouts have been added so the change and instruction clearly show the details of your request.


Subcontract Potential Change Order
MOCKUP

1. Remove the 'Request Received From' field.
2. Remove the 'Field Change' field.
3. Remove the 'Accounting Method' field.
4. Add a gray line separator between 'Potential Change Order Title' and 'Change Reason' areas.
5. Add a bold, black separator between attachments and the table.
6. Add a 'Change Order Detail' with black underline to act as a heading above the table of line items.
7. Add a bold, black separator above text specified in 9.
8. Add this text above the signature lines and align to center: "The above prices and specifications of this change order are satisfactory and are hereby accepted. All work to be performed under the same terms and conditions as specified in the original contract unless otherwise stipulated."
9. Reverse the signature line positions as shown on mockup.
10. Add a bold, black separator below the signature area.

PROCORE

PCO #001

Sals Contractors Inc.
521 5th Avenue
New York, New York 10175
Phone: (866) 435-6903
Fax: (866) 444-6667

Project: 1234 - Sample Project
186 Broadway Avenue
Tacoma, Washington 98402
Phone: (651) 404-1755
Fax: (218) 433-5548

Subcontract Potential Change Order #001: CE #002 - Reshingle Roof Edge

CONTRACT COMPANY:	Fairpoint Roofing Co. 1721 Technology Dr NE Willmar Minnesota, 56201	CONTRACT FOR:	SC-1234-001 - Roofing
PCO NUMBER/REVISION:	001 / 0	CREATED BY:	Katie Thompson
~~REQUEST RECEIVED FROM:~~	~~Austin Klein (Sal's Contractors)~~	CREATED DATE:	6/28/2019
STATUS:	Approved	SUBCONTRACT CHANGE ORDER:	#001 - CE #002 - Reshingle Roof Edge
REFERENCE:	CE - 002	CHANGE ORDER REQUEST:	#001 - CE #002 - Reshingle Roof Edge
~~FIELD CHANGE:~~	~~Yes~~	~~ACCOUNTING METHOD:~~	~~Amount Based~~
LOCATION:	Main Building	PAID IN FULL:	Yes
SCHEDULE IMPACT:	2 days	TOTAL AMOUNT:	$165.00

POTENTIAL CHANGE ORDER TITLE: CE #002 - Reshingle Roof Edge

CHANGE REASON: Backcharge

POTENTIAL CHANGE ORDER DESCRIPTION: *(The Contract Is Changed As Follows)*
CE #002 - Reshingle Roof Edge
Roof's edge had to be reshingled after framers straightened the wall.

ATTACHMENTS:
sample image.jpg

CHANGE ORDER DETAIL

#	Cost Code	Description	Type	Amount
1	07-300 - Shingles, Roof Tiles, and Roof Coverings	3 hours @ $55	Commitment	$165.00
			Subtotal	$165.00
			Grand Total	$165.00

The above prices and specifications of this change order are satisfactory and are hereby accepted. All work to be performed under the same terms and conditions as specified in the original contract unless otherwise stipulated.

Fairpoint Roofing Co.
1721 Technology Dr NE
Willmar Minnesota 56201

Sals Contractors Inc.
521 5th Avenue
New York New York 10175

SIGNATURE DATE

SIGNATURE DATE

Sals Contractors Inc. page 1 of 1 Printed On: 7/24/2019 11 :34 AM

How to Apply Markup to a New Build Custom PDF Form

Steps

1. Open the template you would like added to Procore as a **Word Document**.
    a. A Word Document is required as it ensures the greatest accuracy when applying the desired verbiage to your Custom Form.

2. Mark up the Word Document by **adding highlighting** for ***any dynamic information that could change within the document***. See the details below for specifics on how to add highlighting.
    a. Fields included in Procore by Default: HIGHLIGHT IN YELLOW
        i. These are fields that are included in the Procore Tool as a standard.
            1. e.g. Subcontractor's company name, date created, total amount, etc., are all included when creating a Subcontract in Procore.
            2. It is highly recommended to navigate to the Tool in Procore you are making a markup for to see all available fields.
    b. Custom Fields: HIGHLIGHT IN RED
        i. Custom Fields refer to variable information that needs to populate in your Form that does not exist in Procore by default, and ***that have been made as a Custom Field and applied to a current Fieldset***. See Create Custom Fields section below.
            1. The instructions should note which fieldset you've applied the custom field to (either the individual item, or the project admin fieldset)
    c. Text that is boilerplate language that does not ever change, do not highlight.

3. Send in two copies of the desired PDF: **one (1) Markup Copy** and **one (1) Clean Copy**.
    a. Markup Copy: Include a sample of the form with markup in DOC or DOCX format.
    b. Clean Copy: This should be the "end result" that you want Procore to develop. For example, this could be a completed contract with all information populated. This copy can be DOC, DOCX, or PDF format.
    c. Both copies are used in the development of your form and are not simply "uploaded" into Procore. The PDF is re-coded separately for use in Procore using your markups as a guide.

EXAMPLE

THIS CONTRACT made **April 12, 2022**, by and between **Commercial Contractor LLC**, hereinafter called the "Contractor", and **Albert's Doors and Windows, Inc.** hereinafter called the "Subcontractor".

WHEREAS the Contractor has hereto entered into a contract with **ABC Owners**, hereinafter called the "Owner" to perform certain labor and furnish certain materials for the erection, construction and completion of

Sample Project
186 Broadway Avenue
Tacoma, Washington 98402

CLEAN COPY

THIS CONTRACT made From "Date Created", by and between From "Office Display Name", hereinafter called the "Contractor", and From "Contract Company" hereinafter called the "Subcontractor".

WHEREAS the Contractor has hereto entered into a contract with From "Owner/Client" in Prime Contract, hereinafter called the "Owner" to perform certain labor and furnish certain materials for the erection, construction and completion of

From "Project Name"
From Project "Address
City, State Zip"

MARKUP COPY

CONTRACT DOCUMENTS: The Contract Documents for this Subcontract consists of this Agreement between the Owner and Contractor dated, 7/15/19, the Conditions of the Contract between the Owner and Contractor, Drawing Specifications, all Addenda issued prior to execution of the Agreement between the Owner and Contractor, and all modifications issued subsequent thereto. All of the above documents, which form the Contract between the Owner and Contractor are a part of this Subcontract and shall be available for inspection by the Subcontractor upon his request.

SUBCONTRACT AMOUNT: Three Thousand Three Hundred Forty-Four Dollars and Zero Cents ($3,344.00)

CLEAN COPY

LIQUIDATED DAMAGES: The parties agree that if the Work to be done by the Subcontractor under this Agreement is not completed on the time Subcontractor will be liable for, and shall pay to the Contractor as Liquidated Damages and not as a penalty, in the amount of Two Hundred and Fifty Dollars ($250.00) per each calendar day until completed.

CONTRACT DOCUMENTS: The Contract Documents for this Subcontract consists of this Agreement between the Owner and Contractor dated, From "Signed Contract Received Date" in Prime Contract, the Conditions of the Contract between the Owner and Contractor, Drawing Specifications, all Addenda issued prior to execution of the Agreement between the Owner and Contractor, and all modifications issued subsequent thereto. All of the above documents, which form the Contract between the Owner and Contractor are a part of this Subcontract and shall be available for inspection by the Subcontractor upon his request.

SUBCONTRACT AMOUNT: From "Grand Total in Schedule of Values

MARKUP COPY

LIQUIDATED DAMAGES: The parties agree that if the Work to be done by the Subcontractor under this Agreement is not completed on the time Subcontractor will be liable for, and shall pay to the Contractor as Liquidated Damages and not as a penalty, in the amount of From custom field called "Liquidated Damages" located in Admin fieldset per each calendar day until completed.

A. **DESCRIPTION:**
Complete Work according to specifications and schedule noted.

C. **INCLUSIONS:** The Scope of Work shall include, but is not limited to the following:
Includes Labor.

D. **EXCLUSIONS: The following items are specifically excluded:**
Excludes Material.

CLEAN COPY

E. **SCHEDULE:**
Work is to commence by estimated start date 1/1/2022 and conclude on estimated completion date 1/1/2023.

A. **DESCRIPTION:**
From Subcontract "Description" Field

C. **INCLUSIONS:** The Scope of Work shall include, but is not limited to the following:
From Subcontract "Inclusions" Field

D. **EXCLUSIONS: The following items are specifically excluded:**
From Subcontract "Exclusions" Field

MARKUP COPY

E. **SCHEDULE:**
From Custom "Schedule" Field on Subcontract Page

F. **CLARIFICATIONS AND GENERAL NOTES:**
From Custom "Clarifications" Field on Subcontract Page

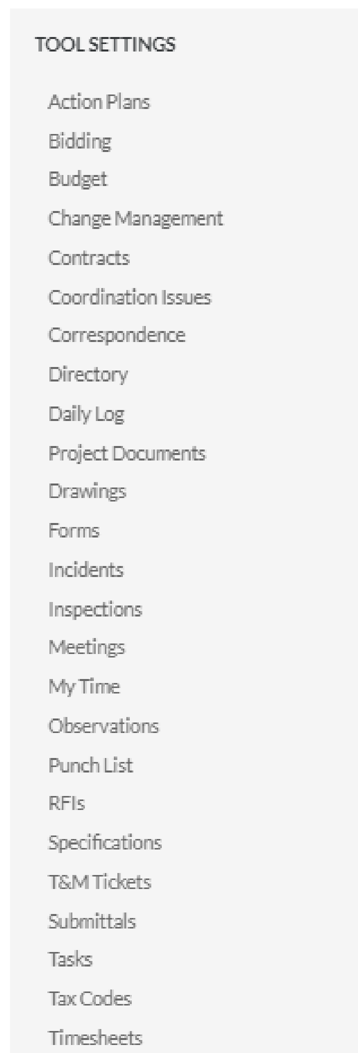
Create Custom Fields and Create/Apply Fieldsets

NOTE: Custom Solutions does NOT create user-facing custom fields.

What is the difference between a custom field and a custom fieldset?

Users with ‘Admin’ permissions on the Company level Admin tool have the ability to create custom fields and apply them to configurable fieldsets for supported tools within Procore.

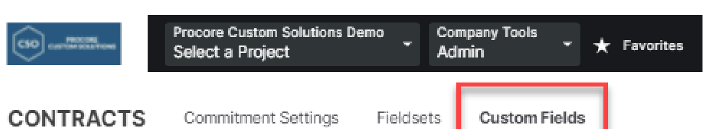
Configurable fieldsets are groups of fields available in certain Procore tools that can be set to optional, required, or hidden. For example, configurable fieldsets could allow Company Admins to require cost codes in Manpower Log entries.



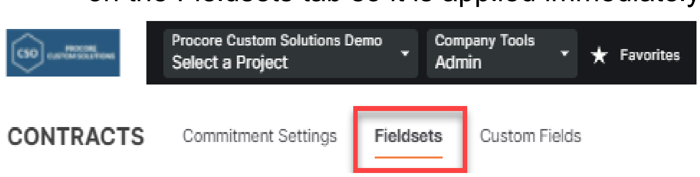
How do you implement a custom field?

Steps

1. Navigate to the Company level Admin tool.
2. Under 'Tool Settings', click the tool you want to create custom fields for. (Pictured Right)
3. Create Custom Fields for a Configurable Fieldset
   There are two ways to create new custom fields to use on projects. Choose one of the following:
   - Option 1: To create custom fields that you can add to fieldsets later.



   - Option 2: To create custom fields while in a fieldset on the Fieldsets tab so it is applied immediately.



4. Apply a Fieldset to Projects

What types of fields are available?

Note: Certain field types may not be available for all tools.

- **Checkbox:** The field will be a checkbox that can be marked or cleared.
- **Company:** The field will be a drop-down menu that allows users to select a Company from the Project Directory.
- **Date:** The field will allow the user to select a calendar date.
- **File Uploads:** The field will allow attachments to be added from supported tools in Procore or the user's computer.
- **Multi Select:** The field will be a drop-down menu that allows users to select multiple values.
- **Number:** The field will allow a number value to be entered.
- **Plain Text (Short):** The field will be a free text field.
- **Project Directory User (Multi Select):** The field will be a drop-down menu that allows users to select one or more users from the Project Directory.
- **Project Directory User (Single Select):** The field will be a drop-down menu that allows users to select a user from the Project Directory.
- **Read Only Entry:** The field will allow you to type a message, such as instructions, in the text box, which will be visible on an item.
- **Rich Text (Long):** The field will be a rich text field that supports paragraphs to allow longer responses and bold, italic, and underlined text.
- **Single Select (Dropdown):** The field will be a drop-down menu that allows users to select one value.
- **Tool User (Single Select):** The field will be a drop-down menu that allows users to select a user with 'Read Only' or higher permissions to the tool.

How many fields are allowed per tool?

Tool	Fieldsets Available to Configure with Custom Fields	Number of Custom Fields Allowed per Fieldset
Admin (Project Level)	• *Project* *Note*: Only one 'Project' fieldset can be created and the fieldset will apply to all new and existing projects.	15
BETA **Change Events** (Change Management)	• *Change Events*	10
Client Contracts	• *Client Contracts*	30
Commitments (Contracts)	• *Purchase Orders* • *Subcontracts*	30
Correspondence	• *Correspondence Type* *Note*: Each Correspondence Type has its own fieldset, and individual limit of 15 fields.	15

Daily Log	• *Manpower Log* • *Notes Log* • *Visitors Log*	5
Incidents	• *Incident* • *Injury/Illness* • *Property Damage* • *Environmental* • *Near Miss* • *Witness Statement* • *Action*	15
Inspections	• *Unassociated* • *Quality* • *Safety* • *Commissioning* • *Environmental* *Note*: Each of your company's custom Inspection Types will have its own fieldset.	10
Observations	• *Commissioning* • *Environmental* • *Quality* • *Safety* • *Warranty* • *Work to Complete*	10
Prime Contracts (Contracts)	• *Prime Contracts*	30
Punch List	• *Punch Item*	10
RFIs	• *RFI*	10
Specifications	• *Specification Section Revision* *Note*: When a new revision is uploaded to a specification in the project's Specifications tool, any data in the item's custom field(s) will be blank on the revision.	10
Submittals	• *Submittal Log*	10
T&M Tickets	• *General Information* • *Labor* • *Materials* • *Equipment* • *Subcontractors*	10