

How to Create Markups for a Custom PDF Request

[Apply Markup to an Existing PDF Form](#)

Instructions on how to markup an existing Procore Standard PDF or an Existing Custom PDF that you would like to tweak. Typically these are small changes.

[Apply Markup to a New Build Custom PDF Form](#)

Instructions on how to markup a brand new build that you would like to replace an existing Procore PDF. These are usually very different than the existing PDF, and are more extensive modifications.

How to Apply Markup to an Existing PDF Form

Steps

1. Export and Download the existing PDF.
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 standard PDF's that can be exported from a Procore tool. Callouts have been added so the instructions 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: (955) 435-6902
Fax: (955) 444-6907 Project: 1234 - Sample Project
186 Broadway Avenue
Tacoma, Washington 98402
Phone: (855) 404-1750
Fax: (216) 433-5548

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

<small>CONTRACT COMPANY:</small> Fairpoint Roofing Co. 1721 Technology Dr NE Willmar Minnesota, 56201	<small>CONTRACT FOR:</small> SC-1234-001 - Roofing
<small>PCO NUMBER/REVISION:</small> 001 / 0	<small>CREATED BY:</small> Kella Thompson
<small>REQUEST RECEIVED FROM:</small> Justin Klein (Sals-Contractors)	<small>CREATED DATE:</small> 6/28/2019
<small>STATUS:</small> Approved	<small>SUBCONTRACT CHANGE ORDER:</small> #001 - CE #002 - Reshingle Roof Edge
<small>REFERENCE:</small> CE - 002	<small>CHANGE ORDER REQUEST:</small> #001 - CE #002 - Reshingle Roof Edge
<small>FIELD CHANGE:</small> Yes	<small>ACCOUNTING METHOD:</small> Amount Based
<small>LOCATION:</small> Main Building	<small>PAID IN FULL:</small> Yes
<small>SCHEDULE IMPACT:</small> 2 days	<small>TOTAL AMOUNT:</small> \$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 trusses straightened the wall.

ATTACHMENTS:
sample image.jpg

CHANGE ORDER DETAIL

#	Est Date	Description	Type	Amount
1	06/28/2019	Shingles Roof Trim, and Roof Cornice	Contractors	\$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.

<small>Fairpoint Roofing Co. 1721 Technology Dr NE Willmar Minnesota 56201</small>	<small>Sals Contractors Inc. 521 5th Avenue New York New York 10175</small>
_____ <small>SIGNATURE</small>	_____ <small>SIGNATURE</small>
_____ <small>DATE</small>	_____ <small>DATE</small>

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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 information that could change within the document***. See the details below for specifics on how to add highlighting.
 - a. Standard Field Values: **HIGHLIGHT IN YELLOW**
 - i. Standard field values refer to variable information entered into a standard field that is included in a tool by default.
 1. e.g. Vendor's company name, contract, total amount, etc.
3. Send in two copies of the form: **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.

EXAMPLE

In this example, the request is for a Contract PDF for your company (a.k.a., "ABC Owners LLC").

THIS CONTRACT made **March 14, 2019**, by and between **ABC Owners LLC**, hereinafter called the "Owner", and **Albert's Doors and Windows, Inc.** hereinafter called the "Contractor".

For the following Building:

Sample Project
186 Broadway Avenue
Tacoma, Washington 98402

CLEAN COPY

THIS CONTRACT made **From "Contract Date"**, by and between **From "Company Name"**, hereinafter called the "Owner", and **From "Vendor"** hereinafter called the "Contractor".

For the following Building:

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

MARKUP COPY