

How to Create Markups for a Custom Form Request

[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.

[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 form 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: (955) 435-6902
Fax: (955) 444-6907 Project: 1234 - Sample Project
186 Broadway Avenue
Tacoma, Washington 98402
Phone: (851) 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>REQUEST RECEIVED FROM:</small> Justin Klein (Sals Contractors)
<small>STATUS:</small> Approved	<small>CREATED BY:</small> Kalle Thompson
<small>REFERENCE:</small> CE - 002	<small>CREATED DATE:</small> 6/28/2019
<small>FIELD CHANGE:</small> Yes	<small>SUBCONTRACT CHANGE ORDER:</small> #001 - CE #002 - Reshingle Roof Edge
<small>LOCATION:</small> Main Building	<small>CHANGE ORDER REQUEST:</small> #001 - CE #002 - Reshingle Roof Edge
<small>SCHEDULE IMPACT:</small> 2 days	<small>ACCOUNTING METHOD:</small> Amount Based
	<small>PAID IN FULL:</small> Yes
	<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 Item	Description	Type	Amount
1	01.001 - Shingles, Roof Trim, and Roof Coverage	3 hours @ \$55	Conversion	\$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 Procore tool by default.
 1. e.g. Subcontractor's company name and address, date created, scheduled impact, total amount, etc.
 - b. Custom Field Values: **HIGHLIGHT IN RED**
 - i. Custom Field values refer to variable information that needs to populate in your Form, but does not currently exist in Procore and requires a Custom Field. Refer to [Get Started with Custom Fields](#) for details on Custom Fields.
 1. Item-Specific Custom Fields
 - a. Item-Specific Custom Fields refer to information that could change on an item by item basis.
 - i. e.g. Exhibit information, Subcontractor Contact Name, etc.
 2. Project-Wide Custom Fields
 - a. Project-Wide Custom Fields refer to information that remains the same across all items within a Project. These Custom Fields are added to the Project Admin page in Procore.
 - i. e.g. Additional Insured, Liquidated Damages, Owner's Project Number, Warranty Information, etc.
 - b. ALWAYS APPEND ****ADMIN**** TO THE MARKUP SHOWING THE PROJECT-SPECIFIC VALUES TO DISPLAY.
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 Procure 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 form that your company (a.k.a., “Commercial Contractor LLC”) can use to create subcontracts.

THIS CONTRACT made **March 14, 2019**, 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 issues 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).

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.

CLEAN COPY

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 issues 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**

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 **Add custom field called “Liquidated Damages” **ADMIN**** per each calendar day until completed.

MARKUP COPY