

Procore Project Set-up Procedures

The Job needs to be assigned a job number in Sage. (Brent)

The estimate needs to be interfaced in Sage (Estimator)

ERP Integrations – Adding the project to Procore (Brent, Tessa, Dawn & Monica)

1. Navigate to the company's **ERP Integrations** tool.
2. Click the **Jobs** subtab.
3. Click **Ready to Export** in the 'Filters' menu.



This reveals the 'Projects in Procore Not Synced to Sage 300 CRE' page.

1. Review the project information in the 'Projects in Procore Not Synced to Sage 300 CRE' page. Make sure that the Standard Project Template is applied from the drop-down menu.

JOBS ONLY IN SAGE 300 CRE

Sage 300 CRE ID	Project Name	Status	Procore Project Template	Standard Project Template	+ Add to Procore	
SI-17-04	DAIRY QUEEN	In Progress	Procore Project Template	Standard Project Template	+ Add to Procore	
PC-18-17	RECONSTRUCTION DENVERAPTS	Undertaken	Procore Project Template	Standard Project Template	+ Add to Procore	
PC-19-18	Fire Const. West Temple Towerton	In Progress	Procore Project Template	Standard Project Template	+ Add to Procore	
SI-17-09	TEST	Undertaken	Procore Project Template	Standard Project Template	+ Add to Procore	

2. Choose **+Add to Procore**.
This initiates the export process.
 - If the export process is successful, the system moves the project(s) from the 'Projects in Procore Not Synced to Sage 300 CRE' list to the 'Synced Projects' list. To view this list, click **Synced** in the 'Filters' menu.

Filters

- Ready to Import (3)
- Ready to Export (4)
- Ready to Update (2)
- Failed to Export (0)
- Synced (59)
- Archived (2)

Import a Budget from Sage 300 CRE

Steps

1. Navigate to the **ERP Integrations** tool.
This reveals the Sage 300 CRE Integration page.
2. Click the **Budgets** tab.



This opens the Sage 300 CRE Ready To Import page in the Budgets tab.

3. Locate the desired project's budget in the **Sage 300 CRE Ready To Be Imported** list.

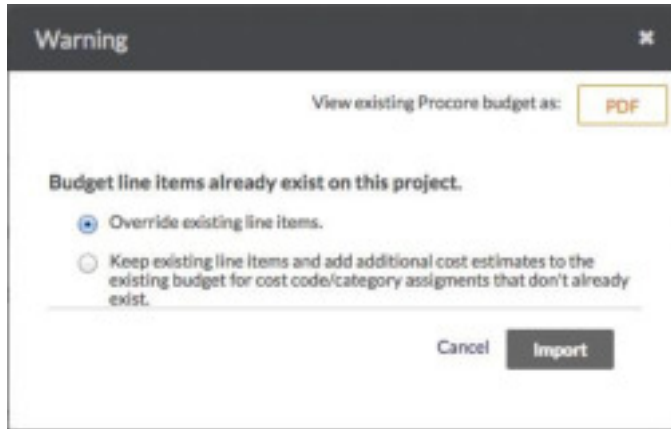
SAGE 300 CRE COSTS READY TO BE IMPORTED

Sage 300 CRE ID	Project Name	Total Estimate	Import	
10414-121	New Facility	\$2,014,471.01	Import	⊘
14-411	Bees & Gish Club	\$1,908,841.70	Import	⊘

4. Click **Import** (*Note: If this button is grayed out and unavailable, you must unlock it first. See [Unlock a Budget](#)*).
5. Choose from these options:
 - The system begins the import.

OR

- If a **Warning** message appears, the project already has existing line items. Choose one of these options to respond:



- **Review Existing Procore Budget As.** If you want to review the existing budget in order to choose an option, click the **PDF** button to review the existing line items.

OR

- **Override Existing Line Items.** If you want to override the line items that exist in the Budget tool with the line items being imported into Procore from Sage 300 CRE, choose this option.

OR

- **Keep Existing Line Items And Additional Cost Estimates.** If you want to keep all of the existing budget line in the project's Budgets tool and also want to add any additional cost estimates from Sage 300 CRE (which have been assigned to cost code/categories and do not yet exist in Procore), choose this option.

6. After the import completes, navigate to the project's Budget tool and verify that the data import was successful.

***If the import was successful lock the budget.**

***Once the Project has been added to Procore the Project team needs to be added in the Job Directory.**

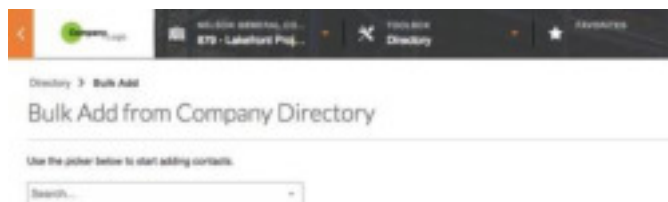
Adding Project Team to the Directory (Estimating Coordinator)

Margo Culwell, Russ Ingram, and Shelley Stone are automatically added to all new projects.

1. Navigate to the project's **Directory** tool. This reveals the Project Directory page.
2. In the right pane, click **Bulk Add from Co. Directory**.



This opens the 'Bulk Add from Company Directory' page.



3. Choose from the following options:

- **Bulk Add All People and Companies from the Company Directory**

To bulk add all the people and companies in the Company Directory to the project, click **Select All**. This adds all of the records from the Company Directory to a table on the page (*Note*: To remove all of the selections in the table, click **Clear All**).

Directory > Bulk Add

Bulk Add from Company Directory

Use the picker below to start adding contacts.



A search picker interface with a search box containing "Search...". Below the search box are two buttons: "Select All" (highlighted in orange) and "Clear All". Below these buttons is a list of search results. The first result is "ABC Concrete" with a building icon. The second result is "Person's Name" with a person icon. The third result is "ABC Plumbing" with a building icon.

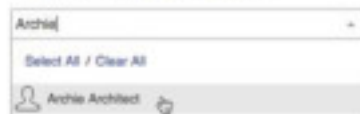
- **Bulk Add a Person**

To add a person, start typing the person's name in the **Search** box. Then select the matching person's name from the drop-down list to add the person to a table on the page.

Directory > Bulk Add

Bulk Add from Company Directory

Use the picker below to start adding contacts.



A search picker interface with a search box containing "Archie". Below the search box are two buttons: "Select All" and "Clear All". Below these buttons is a list of search results. The first result is "Archie Architect" with a person icon and a mouse cursor pointing to it.

- **Bulk Add a Company**

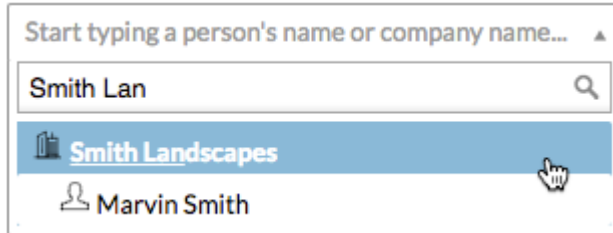
To add a company, start typing the company name. Then select the matching company name from the drop-down list.



A screenshot of the bulk add interface. At the top, it says "Directory > Bulk Add" and "Bulk Add from Company Directory". Below this is a table with three columns: "Name", "Company Name", and "Add?". The first row has a person icon, "Archie Architect", and a red "X" icon. Below the table is a search picker with "Archie Architect" selected. To the right of the search picker is a button labeled "Add Employees".

- **Bulk Add a Company and its Employees**

To add a company and its employees, start typing the company name. Then select the matching company name from the drop-down list. If the company has employees, their names appear below the company name. A dialog box also appears so you can click **OK** to confirm that you want to add all of the company's employees.



4. If you added users to the table on the Bulk Add from Company Directory page, you will also need to complete these steps:

- **Apply a Permission Template**

For each user, select the appropriate permission template from the **Permission Template** list. There are two Subcontractor/Vendor permissions set-up in Procure. If the person will need access to the commitment at anytime make sure that they are assigned the Subcontractor/Vendor-External permission template.

AND

- **Select a Project Role**

For each user, select the appropriate project role from the **Project Role** list. This is very important.

- **(Optional) Notify the Person**

If you want the system to send an email notification to the person to let them know they were added to the project, mark the **Notify** checkbox.

- **Remove the Person (or Company)**

If you want to remove a person (or company) from the list, click the RED 'x'.

5. Scroll to the bottom of the page. Then click **Add to Project**.

A banner appears to confirm that the system is adding the changes to the Project Directory.

***If the vendor you are looking for has not been added to the company directory please contact Dawn or Monica to add them. Please provide them with the correct vendor # from Sage.**

Add General Project Information (Estimating Coordinator Initially and PA to verify)

1. Navigate to the project's **Admin** tool. This reveals the Admin page.
2. Under 'Project Settings', make sure **General** is selected.

PROJECT SETTINGS

General

Active Tabs

Cost Codes

Locations

Equipment

Extracts

1. In the project's Admin page, complete the data entry as follows:
Note: The project information that you enter in this page may appear in numerous locations throughout Procore (i.e., when accessing the project in Procore Web and Procore Drive, project-related emails sent from Procore, CSV and PDF files exported from the project's tools, Contracts and so on). You must fill in the Address, Estimated Completion Date, Office (Kier Construction), Enable DocuSign must be checked, and Exhibit B must be filled in.
 - a. **Update the project's general information as follows:**

A screenshot of the Procore Admin page for project settings. The page is titled 'ADMIN' and contains a form with various fields for project information. The fields are arranged in a grid-like structure with labels on the left and input fields on the right. Some fields have dropdown menus, and some have checkboxes. The form is partially filled with data, and there are some error messages or status indicators next to certain fields.

- **Project Name***. This pulls in automatically from Sage. This is a required field.
- **Active Project?** Place a checkmark in the box to indicate that the job is active project in your company's Procore account. Remove the checkmark to place the project in the inactive status. (Procore Admins can reactivate Jobs if needed).
- **Job Number**. This is pulled from Sage. Do Not Edit
- **Sage 300 ID**. This is pulled from Sage and will be the same number as the Job Number.
- **Project Description**. Enter a description for your project.

- **Square Feet.** Enter the total number square feet of your project. This will only be reflected here for informational purposes.

- **Job Phone.** Enter the phone number of the primary contact phone number for the job site.

- **Job Fax.** Enter the fax number to receive faxes for the job site.

- **Address*.** Enter the address of the project's job site. If your project has a different physical and post address, it is recommended that you enter the physical address of the job site. This ensures that the system Latitude/Longitude values are accurately calculated to the job site, which will improve the quality of your end user's experience when viewing the 'Project Weather' forecast on the Project Home page and Weather Log information in the Daily Log tool.

- **City*.** Enter the city in which the job site resides.

- **Country/State*.** Enter the country and state in which the job site resides.

- **Country/State*.** Enter the country and state in which the job site resides.

- **ZIP*.** Enter the ZIP code. You can enter the 5-digit 'Zip Code' format (i.e., 93013) or 'Zip Code + 4' format (i.e., 93013-2931).

- **Time Zone*.** Choose the correct time zone for the project. This time zone will determine time stamps on items in the project.

- **Estimated Start Date:** Set the estimated project start date. After the project has begun, you can compare this field against your actual start date. The "Actual Start Date" field will inherit this value unless a project schedule is uploaded.

- **Estimated Completion Date:** Set the estimated project completion date.

- **Warranty Start Date.** Select the start date for the construction contract warranty.

- **Warranty End Date.** Select the end date for the construction contract warranty.

- **Actual Start Date.** This pulls in the date that the project was pulled into Procore.

- **Projected Finish Date:** This field is pulled from the last schedule task on the uploaded project schedule. If no schedule is uploaded, then you are able to manually update this field, or it will inherit the date of the "Estimated Completion Date" field. You can override this date if necessary using the "Override imported schedule date" checkbox. (*Note:* The "Actual Completion Date" can be found in the Prime Contract tool under "General Information." You will be able to set this date as part of your prime contract.)
- **Override Imported Schedule Dates.** If you have uploaded a Project Schedule to Procore, the dates from that schedule appear here. To override the uploaded schedule dates, place a checkmark in the box. The dates are reflected in the Actual Start and/or Projected Finish dates that display in the Overview of the company's Portfolio tool.
- **Parent Job.** Select the name of the parent project in Procore from the list. In Procore, a *parent job* is a Procore project that has been designated as the 'parent' project for one or more related project(s) in Procore's Portfolio tool.

b. Update the **General Project Settings** as follows:

GENERAL PROJECT SETTINGS			
Project Stage:	<input type="text"/>	Office:	<input type="text"/>
Project Type:	<input type="text"/>	Project Flag:	<input type="text"/>
Department:	<input type="text"/>	Program:	<input type="text"/>
Bid Type:	<input type="text"/>	Owner Type:	<input type="text"/>
Region:	<input type="text"/>		
Copy People From:	<input type="text"/>		

- **Project Stage.** Choose the stage your project is in. Certain stages enable certain actions in Procore (e.g. Bidding in the Bidding stage.)
- **Office*.** Choose the office that is managing this project. This will always be Kier Construction Corporation.
- **Project Type.** Choose a project type from the drop-down menu. These project types can be set in the Company level **Admin** tab.
- **Project Flag.** Choose a color of a project flag you would like to appear next to this project in the Portfolio tab. This is purely for organizational purposes (*Note:* For example, you may want to flag all commercial projects as GREEN and all internal projects as RED).

- **Departments.** Choose one or several departments of your company that are working on this project. This will be reflected in the Timecard tab, Directory, and more places throughout Procore depending on your settings.
 - **Program.** Choose the program this project is considered under. This will be reflected in your **Programs** tab.
 - **Bid Type.** Select the bid type from the list. These selections are created with the company's Admin tool.
 - **Owner.** Select the owner type from the list. These selections are created with the company's Admin tool.
 - **Region.** Select the region into which you want to classify your project. You can view projects by program with the Portfolio tool. These selections are created with the company's Admin tool.
 - **Copy People From.** The system copies the people (a.k.a., contacts/user records from the source project into your current project.
- b. Update the project's **Advanced Project Settings** as follows:
- **Upload Project Logo:** Click **Choose File** to select a file to upload as your project logo.
 - **Enable DocuSign integration*:** Mark the checkbox to enable the DocuSign Integration on your contracts.
 - **Prevent Overbilling on this Project*:** If this is enabled, it will disable the "Allow Over Billing" setting in the Commitment tool's configuration setting. This setting only applies to Requisitions, and not Payment Applications.
3. Everything with an * by it must be filled in.
 4. Click **Update**.
 5. The system saves the updated project settings.

Create a Prime Contract (Estimating Coordinator/ PA)

1. Navigate to the project's **Prime Contract** tool. This reveals the Prime Contract page.
2. Click **Create Prime Contract**.

 + Create Prime Contract

This reveals the New Prime Contract page.

3. Under 'General Information', complete the following data entry:

(Note: None of these fields are required to create a Prime Contract. You can add information at a later time, if desired.)

- **Sign with DocuSign***: Enable this to sign with DocuSign
- **Contract #**: Assign a unique identifier for the Prime Contract.
- **Title**: Provide a descriptive name for the Prime Contract.
- **Owner/Client***: Select the party to whom you will be sending your payment application. They need to be in the directory.
- **Contractor***: Enter Kier Construction here.
- **Architect/Engineer***: Select the lead architect on the project. They need to be in the directory.

- **Status***: Specify the current status of the Prime Contract. (e.g. Draft, Out For Bid, Out For Signature, Approved, Complete, or Terminated)
Note: If the status is set to "Approved" or "Complete", change orders and pay apps can be created. If the status is set to anything other than "Approved" or "Complete," change orders and pay apps cannot be created.
- **Executed**: Place a mark in this checkbox to denote that the contract was fully signed and executed.
- **Private**: Specify who can view the Prime Contract. By default, the Prime Contract is "private" and is only visible to users with 'Admin' user permissions on the Prime Contract tool. You can also allow non-Admin users to view the Prime Contract, if desired. Additionally, you can also allow selected non-Admin users to have read-only access to individual line items under the SOV subtool.
- **Default Retainage***: Specify a default percentage that will automatically be applied to all line item costs for retainage purposes. (e.g. 10%)
- **Description**: Provide a helpful description about the contract.
- **Attachments**: Attach any relevant documents, such as a signed copy of the contract.
- **Date Created**: Automatically populates with the date the contract is created.
- **Start Date**: Specify the project's official start date.
- **Estimated Completion Date***: Specify the estimated date for project completion.
- **Substantial Completion Date**: Specify the Substantial Completion date here.
- **Actual Completion Date**: Once a project has been officially completed (i.e. final payments have been processed and closed) you can specify the actual project completion date for record purposes.
- **Contract Date**: Specify the Contract Date here.
- **Signed Contract Received Date***: Specify the date when the Prime Contract was officially signed by all legally bound parties.
- **Execution Date**: Specify the Execution Date here
- **Issued On Date**: Specify the Date the Contract was Issued.
- **Returned Date**: Specify the Date the Contract was Returned.
- **Letter of Intent Date**: Specify the Date the of the Letter of Intent here.
- **Approval Letter**: Specify the Date of the Approval Letter here.
- **Contract Termination Date**: Enter the date the project closed out.

4. Anything with an * must be completed

5. Click **Create** or **Create & Email**.

The system saves your new Prime Contract.

Creating the SOV on the Prime Contract (Project Manager)

Creating the schedule of values should be based off of the bid breakdown that estimating sent to the Owner unless the Owner has requested more detail on the Payment Application. The preferred methods of creating the SOV on the Prime Contract are Importing from a CSV or Manually Entering Lines. Once this has been created you need to send it to your accounting assistant to enter it into Sage.

Import from a CSV

If you prefer to upload a CSV to import all line items, please download and populate the provided CSV template instead. Be sure to follow the instructions in the tutorial below to ensure that add your data to the CSV in the correct format because the uploader enforces very strict syntax requirements. Data must follow the prescribed format to ensure that your data can be successfully uploaded into Procure. For example, CSV rows that only contain a Cost Code Name and Cost Code Number will not produce a new line item.

Note: The Prime Contract must be in 'Draft' status in order for the Import from CSV option to be available.

Steps

1. Navigate to a project's **Prime Contract** tool.
(*Note:* The Prime Contract must be in Draft.)
2. Go to the **Schedule of Values** subtab.
3. Click the **Edit** button.
4. Scroll to the "Import Schedule of Values From CSV" section and download the blank template (csv_import.csv), which you will use to populate your list of items.

Important! Add your line items into the provided template CSV file. For compatibility reasons, it's strongly recommended that you only use the provided template (csv_import.csv) for importing your SOV.

5. Populate the spreadsheet with the line items of your SOV.

Important! DO NOT rename any of the columns or add/remove columns from the spreadsheet. Make sure to use your project's Cost Codes and Types (as defined under the project's Admin tab > Cost Codes).

Example

	A	B	C	D	E
1	Cost Code Name	Cost Code Number	Description	Line Item Type	Amount
2	01 - General Requirements	01-			
3	01-100 - Summary	01-100			
4	01-200 - Price and Payment Procedures	01-200			
5	01-300 - Administrative Requirements	01-300		OC	750
6	01-400 - Quality Requirements	01-400		L	250
7	01-500 - Temporary Facilities and Controls	01-500			1000
8	01-600 - Product Requirements	01-600			
9	01-700 - Execution Requirements	01-700			
10	01-800 - Facility Operation	01-800		L	1200
11	01-900 - Facility Decommissioning	01-900			
12	02 - Site Construction	02-			
13	02-050 - Basic Site Materials and Methods	02-050		M	2500
14	02-100 - Site Remediation	02-100			
15	02-200 - Site Preparation	02-200			
16	02-300 - Earthwork	02-300		L	10000
17	02-400 - Tunneling, Boring and Jacking	02-400		L	90000
18	02-450 - Foundation and Load-Bearing Elements	02-450		M	240000
19	02-500 - Utility Services	02-500			
20	02-600 - Drainage and Containment	02-600			
21	02-700 - Bases, Ballasts, Pavements and Appurtenances	02-700			
22	02-800 - Site Improvements and Amenities	02-800			
23	02-900 - Planting	02-900		M	1000
24	02-900 - Planting	02-900		L	300
25	02-950 - Site Restoration and Rehabilitation	02-950			
26	03 - Concrete	03-			

- **Cost Code Name:** The detailed name of the cost code number in the following format:
 - 'Division-Code - Title' (e.g. 01-100 - Summary)
Note: if you do not want to use a cost code, you must enter "None" in the Cost Code Name and Cost Code Number fields.
- **Cost Code Number:** The cost code number in the following format:
 - 'Division-Code' (e.g. 01-100)
Note: if you do not want to use a cost code, you must enter "None" in the Cost Code Name and Cost Code Number fields.
- **Description:** (Optional) A more detailed description of the line item.
- **Line Item Type:** (Optional) The Category Type of your Cost Code. (e.g. Labor, Materials, etc.)
(000) You must use one of the supported abbreviations from the list that's defined for your company. For example, if the category type is Materials, use **M** and not *m*, *materials*, or *Materials*. Below are the standard Procure Cost Code Types, but your company may have a modified list. (*Note:* If you add an invalid acronym, the line item's Type will be listed as *Other*.)
 - L - Labor
 - E - Equipment
 - M - Materials
 - S - Commitment
 - OC - Owners Cost
 - SVC - Professional Services
 - O - Other
- **Amount:** Enter a numeric value or the contract amount. (The use of commas and/or the dollar symbol (\$) are not required.) For example, '15000' is correct syntax. If there is no dollar amount to enter, be sure to enter 0.00 (the import will not accept a blank cell).

Note: Blank lines still count as lines in the import process, so be sure to delete them from the end of the SOV file before importing.

6. Specify the type of import/upload action to perform.
 - Delete existing line items, and add CSV as new items
 - Keep existing line items, and add CSV as new items
7. Select the modified CSV file.
8. Click the **Import** button.
9. Wait a few seconds, and then click the **Schedule of Values** subtab to refresh the contents of the tab.
10. Check the import and verify that all items of your budget were properly imported.

Schedule of Values							Edit
#	Cost Code	Description	Type	Contract Amount	Billed To Date	Remaining	
01	01-300 - Administrative Requirements		Owner Cost	\$750.00	\$0.00	\$750.00	
02	01-400 - Quality Requirements		Labor	\$250.00	\$0.00	\$250.00	
03	01-500 - Temporary Facilities and Controls		Other	\$1,000.00	\$0.00	\$1,000.00	
04	01-800 - Facility Operation		Labor	\$1,200.00	\$0.00	\$1,200.00	
05	02-050 - Basic Site Materials and Methods		Materials	\$2,500.00	\$0.00	\$2,500.00	
06	02-300 - Earthwork		Labor	\$10,000.00	\$0.00	\$10,000.00	
07	02-400 - Tunneling, Boring and Jacking		Labor	\$90,000.00	\$0.00	\$90,000.00	
08	02-450 - Foundation and Load-Bearing Elements		Materials	\$240,000.00	\$0.00	\$240,000.00	
09	02-900 - Planting		Materials	\$1,000.00	\$0.00	\$1,000.00	
10	02-900 - Planting		Labor	\$300.00	\$0.00	\$300.00	
Grand Total:				\$347,000.00	\$0.00	\$347,000.00	

11. If you need to make further changes to the SOV, click **Edit**.
 - Manually add additional line items
 - Delete a line item
 - Change the selected cost code number
 - Edit a line item's description, type, and contract amount
12. Click **Save**. (Use the **Save and Email** button if you want to save your changes, as well as forward a copy of the Prime Contract using Procore's built-in email feature. You'll also be able to specify recipients and include a brief message about the Prime Contract.)
13. Email the SOV to your Project Accounting Assistant so they can setup the Contract Billing in Sage.

Manually Add Line Items

To manually add line items to the Schedule of Values:

1. Navigate to the project's **Prime Contract** tool. This reveals the Prime Contract page.
2. Click the **Schedule of Values** tab.

SCHEDULE OF VALUES

#	Cost Code	Description	Type	Contract Amount	Billed To Date	Remain
			Grand Total:	\$0.00	\$0.00	

3. Click **Edit**. This will place the Schedule of Values into edit mode.
4. Under 'Add Line Item' do the following:
 - **Cost Code**. Select a cost code from the drop-down list.
 - **Description**. Enter a description in the box.
 - **Type**. Choose a type from the drop-down list. Amount. Enter an amount in this box.
5. Click **Add**. This adds a line item to the Schedule of Values tab.
6. Repeat the steps above to add other line items.
7. Choose one of the following:
 - Save & Email**. Click this button to save the SOV line item(s) and email the updates to members of the Prime Contract tool's default distribution lists.
 - Save**. Click this button to save the SOV line item(s) on the Prime Contract without sending an email. This saves the SOV line items in the project's Prime Contract tool without sending an email.

Create SOV from the Budget Tool

If you created a project budget (using the Budget tool), you can use it to quickly build out a Prime Contract's SOV. There are two options for how to create the Prime Contract SOV from the Budget tool. (Note: You can only perform this action if there are zero line items.)

1. Navigate to the project's **Prime Contract** tool.
 - Note:* Make sure that the Prime Contract status is set as "Draft" mode under the General tab.
2. Click the **Schedule of Values** sub tool.
3. Click **Edit**.
4. You will have the option to perform one of the following actions:
 - Option 1: A line item will be created for each line item on the project budget**

#	Cost Code	Description	Type	Contract Amount	Billed To Date	Rem
✘ 01	01-100 - Summary	Summary	Materials	\$88,888.00	\$0.00	\$88
✘ 02	01-100 - Summary	Summary	Labor	\$123,445.00	\$0.00	\$123
✘ 03	01-500 - Temporary Facilities and Controls	Temporary Facilities and Controls	Other	\$66,666.00	\$0.00	\$66
✘ 04	02-300 - Earthwork	Earthwork	Commitment	\$1,233.00	\$0.00	\$1
✘ 05	02-900 - Planting	Planting	Labor	\$154,545.00	\$0.00	\$154
Grand Total:				\$434,777.00	\$0.00	\$434

Option 2: A line item will be created for summaries of each division on the project budget. (Note: Use this option if you prefer to breakdown costs by division instead of by individual line items.)

#	Cost Code	Description	Type	Contract Amount	Billed To Date	Remain
✘ 01	01 - General Requirements	General Requirements	Other	\$278,999.00	\$0.00	\$278
✘ 02	02 - Site Construction	Site Construction	Other	\$155,778.00	\$0.00	\$155
Grand Total:				\$434,777.00	\$0.00	\$434

5. Click **Save** to save your changes.

Add Financial Markup (PM /PA)

The financial markup feature allows you to build in a default markup on any of your prime contract change orders and potential change orders. Within the tool you have the option to set the markup to be calculated on an individual line item or as a subtotal of all your line items on the change order. You can associate financial markup to cost codes, categories, and sub jobs to ensure that the money gained from markup on change orders goes to the correct place on the budget. The Profit Cost Code is 99-100 Category O.

Steps

1. Navigate to the project's **Prime Contract** tool.
Note: Financial markup must be turned on in the [advanced settings subtab](#).
2. Click the **Financial Markup** tab. Here is where you can set up the default financial markups that will be applied to all change orders, but markups can be modified or removed on a change order by change order basis.

Prime Contract

General Schedule of Values (38) Change Orders (2) Payment Applications (5) Payments Received (3) Related Items (1) Emails (2) More -

FINANCIAL MARKUP SETTINGS

CALCULATED ON EACH LINE ITEM INDIVIDUALLY TO THE RIGHT

Markup List	Applies To Categories										Amount And Compounding		Will Map To	
Name	L	E	M	S	OC	SVC	O	MP	EC	%	Compounds The Markups Above It?	Cost Code	Category	

[New Horizontal Markup](#)

CALCULATED ON SUBTOTAL OF LINE ITEMS AT THE BOTTOM

Markup List	Applies To Categories										Amount And Compounding		Will Map To	
Name	L	E	M	S	OC	SVC	O	MP	EC	%	Compounds The Markups Above It?	Cost Code	Category	
<input type="button" value="Edit"/> O&P	Y	Y	Y	Y	Y	Y	Y			8.0	N/A			

[New Vertical Markup](#)

- Click **New Horizontal Markup** or **New Vertical Markup**. *Horizontal markup* will display the markup in the same row as the budget line items, as seen below in the Insurance and Contractor's Fee column.

Potential Change Order #033: Addendum 3

General Schedule of Values (2) Related Items (3) Emails (2) Financial Markup Change History (2)

SCHEDULE OF VALUES

#	Cost Code	Description	Type	Contract Amount	Insurance (1.00%)	Contractor's Fee (1.00%)	Subtotal
01	06-100 -Rough Carpentry	Demolish and re-frame and 5 walls	Commitment	\$1,700.00	\$17.00	\$17.00	\$1,834.00
02	07-100 -Thermal Protection -Insulation	Add insulation in 5 walls	Commitment	\$1,700.00	\$17.00	\$17.00	\$1,834.00
Grand Total							\$3,718.00

Vertical markup will display the markup below the budget line items, as seen below in the Insurance and Contractor's Fee row.

Potential Change Order #034: Addendum 4

General Schedule of Values (2) Related Items (3) Emails (2) Financial Markup Change History (2)

SCHEDULE OF VALUES

#	Cost Code	Description	Type	Contract Amount
01	05-100 -Ornamental Metal	Revised/Revised details in Area A	Commitment	\$1,000.00
02	15-100 -Plumbing	Modify Plumbing in Area A	Commitment	\$1,000.00
03	15-100 -Heating, Venting and Air Conditioning	Modify Outwork in Area A	Commitment	\$7,000.00
Subtotal				\$9,000.00
Insurance (1.00%)				\$109.00
Contractor's Fee (1.00%)				\$109.00
Grand Total				\$11,209.00

Example of Change Order with *both* Vertical and Horizontal Markup:

Potential Change Order #035: Addendum 5

General **Schedule of Values (2)** Related Items (2) Emails (2) Financial Markup Change History (12)

SCHEDULE OF VALUES Edit

#	Cost Code	Description	Type	Contract Amount	Tax (\$,%)	Subtotal
01	06-100-Doors	Purchase of upgraded door hardware	Materials	\$1,200.00	\$12.00	\$1,312.00
02	06-100-Exterior Doors	Install of upgraded door hardware	Commitment	\$1,500.00	\$0.00	\$1,500.00
03	09-400-Carpet	LEED compliant carpet upgrade	Commitment	\$2,500.00	\$0.00	\$2,500.00
Subtotal:				\$7,200.00	\$12.00	\$7,512.00
				Insurance (1.00%)		\$75.12
				Contractor's Fee (3.00%)		\$227.41
				Grand Total:		\$7,814.53

4. Enter information in the Markup List:
 - **Markup Name** - Enter in a name for the financial markup.
 - **Markup Percentage** - Enter in the percentage for the markup.
 - **Compounds Markup Above** - If this box is not selected, markup percentage is calculated on the change order subtotal. If the box is selected, markup percentage is calculated on the subtotal with the addition of any preceding markups.
5. By default, the markup will apply to all categories, but you can remove any categories here.
6. Select a Cost Code, Category, and Sub Job that the financial markup associates to. This ensures that the money gained from markup on change orders goes to the correct place on the budget.

Note: If you select a Non-Budgeted cost code or category, you will need to manually add this cost code and category to the budget in order to have that markup appear in the budget. You will *not* see a warning banner on the budget informing you that the markup is not in the budget.

Financial Markup > Vertical Markup

New Vertical Markup

MARKUP LIST

Markup Name*

Markup Percentage*

Compound Markup Move?

APPLIES TO CATEGORIES

Categories

- Labor
- Equipment
- Materials
- Commission
- Owner Cost
- Professional Services
- Other
- Labor Burden
- RICA Tax
- Light Equipment

WILL MAP TO

Cost Code


Category

[Cancel](#) [Save](#)

7. Click **Save**.

Configure Commitment Settings (PA)

Steps

1. Navigate to the project's **Commitments** tool.
2. Click the Configure Settings  icon.
3. After you finish modifying the configurations, click **Update** at the bottom of the page to save your changes.

Contract Configuration:

CONTRACT CONFIGURATION

Contracts Private By Default:	<input checked="" type="checkbox"/>
Enable Purchase Orders:	<input checked="" type="checkbox"/>
Enable Contracts:	<input checked="" type="checkbox"/>
Number of Commitment Change Order Tiers:	1

- **Contracts Private by Default:** This checkbox is marked by default so that new subcontracts are private by default, which means that it will only be visible to administrators and users that are specifically added to the Private dropdown within each Commitment's General subtab.

- **Enable Purchase Orders:** This box is checked by default to allow users to create purchase orders. To prevent users from being able to create purchase orders, leave this box unchecked.
- **Enable Contracts:** This box is checked by default to allow users to create subcontracts. To prevent users from being able to create subcontracts, leave this box unchecked.
- **Number of Commitment Change Order Tiers:** You can select either three tiers (Potential Change Order, Change Order Requests and Commitment Change Orders), two tiers (Potential Change Order and Commitment Change Order) or single tier (Commitment Change Order). Kier will use the single tier for commitments.
Note: You cannot change this setting after any commitment change orders have been created.

Contract Dates

CONTRACT DATES

Enable Approval Letter Date:	<input checked="" type="checkbox"/>
Enable Contract Date:	<input checked="" type="checkbox"/>
Enable Issued On Date:	<input checked="" type="checkbox"/>
Enable Execution Date:	<input checked="" type="checkbox"/>
Enable Letter of Intent Date:	<input checked="" type="checkbox"/>
Enable Returned Date:	<input checked="" type="checkbox"/>

Mark any of the following boxes to enable more date fields in your commitment contract. You can use these dates to determine when certain warranty periods begin, determine the date when the owner takes responsibility for utilities, insurance, and security of the property, and determine when the general contractor and subcontractor(s) are entitled to payment of the contract balance.

- **Enable Approval Letter Date**
- **Enable Contract Date**
- **Enable Issued on Date**
- **Enable Execution Date**
- **Enable Letter of Intent Date**
- **Enable Returned Date**

Default Distributions:

DEFAULT DISTRIBUTIONS

Include Primary Contact in Default Distribution:	<input type="checkbox"/>
Commitment Distribution:	Stanly, Standard <input type="text" value="Select A Person..."/>
Commitment Change Order Distribution:	<input type="text" value="Select A Person..."/>
Request For Quote Distribution:	<input type="text" value="Select A Person..."/>
Requisition Distribution:	Ton, Ashy <input type="text" value="Select A Person..."/>

- **Include Primary Contact in Default Distribution:** If a "primary contact" is specified for a vendor, you can mark this checkbox to automatically include that person in the distribution list by default.
- **Commitment Distribution:** Select a user(s) that should always be added to the commitment's distribution list by default when a commitment is emailed.
- **Commitment Change Order Distribution:** Select a user(s) that should always be added to a commitment change order's distribution list by default when a commitment change order is emailed.
- **Request for Quote Distribution:** Select users to be notified when RFQ responses are submitted. (*Note:* You have the ability to also modify the Request for Quote distribution within the RFQ.) **Add the PM here.**
- **Requisition Distribution:** When a requisition is submitted for this commitment, the user(s) listed in the Requisition Distribution list will receive an email with the requisition details once the status of the Requisition is set to "Under Review." **Add the PM here.**

Default Contract Settings:

DEFAULT CONTRACT SETTINGS

Default Accounting Method for Purchase Orders:	Amount Based ▾	Default Accounting Method For Contracts:	Amount Based ▾
Default Retainage Percent:	<input type="text" value="5"/> %		
Enable Comments By Default:	<input type="checkbox"/>		
Enable Completed Work Retainage By Default:	<input checked="" type="checkbox"/>		
Enable Markup By Default:	<input type="checkbox"/>		
Enable Payments By Default:	<input checked="" type="checkbox"/>		
Enable Requisitions by Default:	<input checked="" type="checkbox"/>		
Enable Stored Material Retainage By Default:	<input checked="" type="checkbox"/>		

- **Default Accounting Method for Purchase Orders:** By default, purchase orders are configured for "Unit/Quantity Based" accounting. However, you can change the accounting method to "Amount Based" if desired.
- **Default Accounting Method for Contracts:** By default, subcontracts are configured for "Amount Based" accounting. However, you can change the accounting method to "Unit/Quantity Based" if desired.
- **Enable Markup By Default:** If enabled, you will see the Financial Markup subtab, so you can set up and apply markup for each commitment. Change orders will automatically be associated with the correct cost code so changes are accurately reflected in the Budget tool.
- **Enable Requisitions by Default:** If enabled, you will see the Requisitions subtab so that requisitions can be created. To prevent users from being able to create requisitions, leave this box unchecked. It's checked by default.
- **Enable Completed Work Retainage By Default:** Check this box to enable completed work retainage by default.
- **Enable Stored Material Retainage By Default:** Check this box to enable stored material retainage by default.
- **Default Retainage Percent:** Specify a default retainage percent (e.g. 5%) that will automatically be set by default.
- **Enable Payments By Default:** To prevent users from being able to create payments, leave this box unchecked. It's checked by default.
- **Enable Comments By Default:** Mark this checkbox to enable a "Comments" subtab where users can add comments and attach files. It's unchecked by default.

Requisition Settings:

1. Click **Requisition Settings** in the rightpane.

Commitment Settings

REQUISITION SETTINGS

Enable Prefilled Billing Periods:	<input checked="" type="checkbox"/>		
Monthly Billing Period:	day 1	To	day 31
Monthly Due Date:	day 25		
Enable Reminder Emails:	<input checked="" type="checkbox"/>	Every 3 Days	
Allow Over Billing:	<input type="checkbox"/>		
Custom Email Text:	<pre>1234 CONSTRUCTION CORPORATION PAYMENT APPLICATION PROCESSES (REQUISITIONS) REVISED: 3/15/18</pre>		

[Update](#)

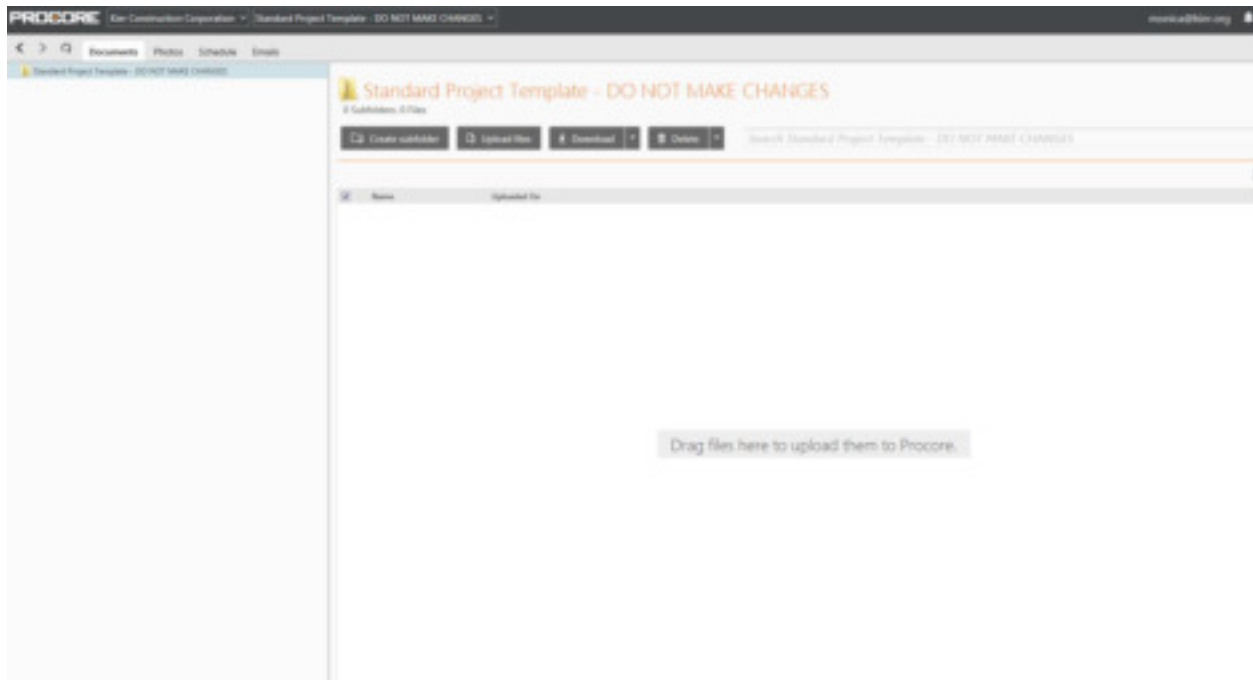
- **Enable Prefilled Billing Periods:** Mark this box so the billing periods prefill with the days selected below.
- **Monthly Billing Period:** Enter which days of the month you want the billing period to begin and end.
Note: You can leave any of the day pickers blank, if you don't want that day to prefill. Set this up as 1-31
- **Monthly Billing Date:** Enter which day of the month is the monthly billing date. This is the due date that the subcontractor needs to create (not submit) the requisition by. If the Billing Date has passed, the subcontractor cannot create a requisition, though an Admin level user can create one on their behalf. If the requisition has been created, and the Billing Date has passed, the subcontractor can still Edit and/or Submit the Requisition if the status is in 'Draft' or 'Revise & Resubmit'. Set this up as the 25th.
Note: You can leave any of the day pickers blank, if you don't want that day to prefill.
- **Enable Reminder Emails:** Mark the box if you want to send reminder emails after sending billing invitations. You can select how often you want to send reminder emails. These emails only go out after you have sent out the invitation that month.
- **Allow Over Billing*:** Mark this box if you want to allow the subcontractor to bill over 100%. **Make sure that this box is unchecked.**
- **Custom Email Text*:** Enter any custom email text you want included in the emails sent to those invited to create a requisition. This is where the Subcontractor Payment Application instructions need to be placed. You can find the document on the H drive under 01 Project Management in the Procore folder. There is a PDF and a word version. Please **DO NOT** make changes to them without updating the revision date at the top of the document.

Documents (PA)

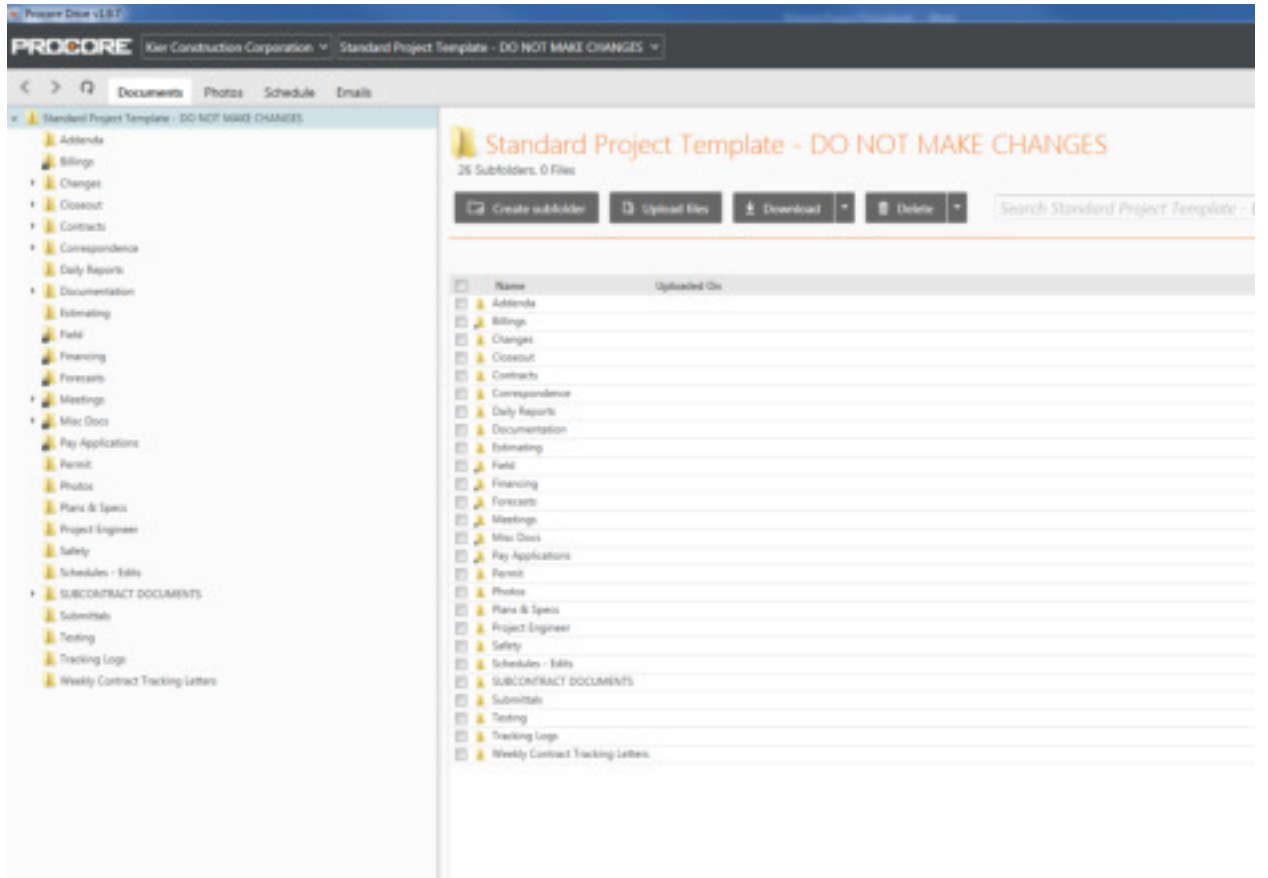
The folder structure and documents will be uploaded through Procore Drive

Steps

1. Open Procore Drive. Login with your username and password.
2. Select the desired company and project in Procore Drive.
3. Select the **Documents** tab.
4. The folder structure and files that need to be copied can found on the H drive under 01 Project Management>Procore>Job Folder Structure. You will want to open this folder and select all of the folders and files, once you have done this drag and drop them into the documents tab in Procore drive.



5. Now expand the job folders.



6. Highlight the desired file or folder in the tree view. This reveals the settings for the selected file or folder in the center pane. Lock the Billings, Filed, Financing, Forecasts, Meetings, Misc. Docs, and Pay Applications.
7. Click on the padlock to lock the folder.

