WORKFLOWS TEMPLATE

Workflow tool: Please type which Procore tool you would like the workflow on

Please describe the current workflow in your company in as much detail as possible: Click or tap here to enter text.

Please list the titles of all people involved (User roles) \*Note\* these roles are in no way associated with “Project Roles” they are two separate parts of Procore. These names are only to denote who should be assigned to this role; the names themselves have no functionality. That being said the names can be generic if the person that will be filling them changes. ex: PM, VP, Project Administrator etc.

Please note:

* The following is just a rough template of a linear workflow; please only fill in as many states as you need. If you require more states, have other special circumstances, or require a non-linear workflow please email [customworkflows@procore.com](mailto:customworkflows@procore.com). This is a linear Workflow. It is a good starting place, but it is flexible and can tailored it to your needs.
* Workflows are very difficult to change once they are in effect. Please discuss the workflow in detail with your team before we enable it across your projects.
* If you have an ERP integration please reach out to our custom solutions team for further clarification with this process: [customworkflows@procore.com](mailto:customworkflows@procore.com)

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| --- | --- | --- | --- |
| Start | User: Click or tap here to enter text.  Action: Click or tap here to enter text.  Status: Click or tap here to enter text.  Procore has the ability to send reminder emails. After how many days would you like reminder emails to be sent out? \_\_\_\_ business/calendar days | Name this State | User: Click or tap here to enter text.  Action: Click or tap here to enter text.  Status: Click or tap here to enter text.  Revise and Resubmit? If so, back to which state? Click or tap here to enter text.  Procore has the ability to send reminder emails. After how many days would you like reminder emails to be sent out? \_\_\_\_ business/calendar days |
|  |  |  |  |
| Name this State | User: Click or tap here to enter text.  Action: Click or tap here to enter text.  Status: Click or tap here to enter text.  Revise and Resubmit? If so, back to which state? Click or tap here to enter text.  Procore has the ability to send reminder emails. After how many days would you like reminder emails to be sent out? \_\_\_\_ business/calendar days | Name this State | User: Click or tap here to enter text.  Action: Click or tap here to enter text.  Status: Click or tap here to enter text.  Revise and Resubmit? If so, back to which state? Click or tap here to enter text.  Procore has the ability to send reminder emails. After how many days would you like reminder emails to be sent out? \_\_\_\_ business/calendar days |
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| Name this State | User: Click or tap here to enter text.  Action: Click or tap here to enter text.  Status: Click or tap here to enter text.  Revise and Resubmit? If so, back to which state? Click or tap here to enter text.  Procore has the ability to send reminder emails. After how many days would you like reminder emails to be sent out? \_\_\_\_ business/calendar days | Name this State | User: Click or tap here to enter text.  Action: Click or tap here to enter text.  Status: Click or tap here to enter text.  Revise and Resubmit? If so, back to which state? Click or tap here to enter text.  Procore has the ability to send reminder emails. After how many days would you like reminder emails to be sent out? \_\_\_\_ business/calendar days |
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| Name this State | User: Click or tap here to enter text.  Action: Click or tap here to enter text.  Status: Click or tap here to enter text.  Revise and Resubmit? If so, back to which state? Click or tap here to enter text.  Procore has the ability to send reminder emails. After how many days would you like reminder emails to be sent out? \_\_\_\_ business/calendar days | Close | User: Click or tap here to enter text.  Action: Close workflow |

Would you like to include a “Void” state? If so, please describe when the workflow will enter “Void” and who will have the option to send it to Void.

Will anyone that is not directly part of the workflow need to be notified at any point in the transitions (ie. Accounting)? Any roles already in the workflow can be notified as well at any transition point. If so who and at what point(s)? Click or tap here to enter text.

Any Additional Details: Click or tap here to enter text.

Example Workflow:

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| --- | --- | --- | --- |
| Start | User: Project Administrator  Action: Send for Review  Status: Draft  Revise and Resubmit? If so, back to which state? No  Send reminder after 2 business days. | PM Review | User: Project Manager  Action: Reviewed and Approved  Status: Pending  Revise and Resubmit? If so, back to which state? Yes, back to start  Send reminder after 3 business days. |
|  |  |  |  |
| VP Review | User: VP  Action: Approved  Status: Pending  Revise and Resubmit? If so, back to which state? Yes, back to start  Send reminder after 1 business days. | Close | User: VP  Action: Close workflow |