Interactive Workflow Diagrams

Select a tool to view its interactive workflow diagram.

- **Bidding**
- **Budget**
- **Change Events**
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  - 2-Tier (Prime Contract) Change Orders
  - 3-Tier (Prime Contract) Change Orders
- **Coordination Issues**
- **Commitments**
- **Daily Log**
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- **Incidents**
- **Inspections**
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- **Meetings**
  - Create a Meeting
  - Create a Meeting Template
- **Observations**
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- **Prime Contract**
- **Punch List**
- **Requisitions**
- **Reports**
- **RFIs**
- **Schedule**
- **Specifications**
- **Submittals**
Bidding

Click a box below to view the related tutorial.

Budget

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Change Events

Click a box below to view the related tutorial.

1-Tier | 2-Tier | 3-Tier
1-Tier Change Orders
2-Tier (Prime Contract) Change Orders

[Diagram showing the workflow for 2-Tier (Prime Contract) Change Orders]

- Create a Change Event from an RFI
- Create RFQs
- Respond to RFQ (on behalf of recipient)
- Respond to RFQ (as a recipient)
- Review RFQ Responses
- Is the change "out of scope"?
  - NO
  - YES
    - Create a Prime PCO
    - Email a Potential Change Order (PCO)
    - Review Prime PCO
      - REJECT
      - APPROVE
      - Add approved Prime PCOs to PCOC
      - Review Prime Contract Change Order (PCCO)
        - REJECT
        - APPROVE
      - Create a Commitment Change Order (CCO)
        - REJECT
        - APPROVE
      - Review Commitment Change Order (CCO)
        - REJECT
        - APPROVE

[Legend]
- General Contractor
- Owner/Client
- Subcontractor
- Optional Step

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3-Tier (Prime Contract) Change Orders

Create a Change Event from an RFI

Create RFQs

Respond to RFQ (on behalf of recipient)

Respond to RFQ (as a recipient)

Review RFQ Responses

Is the change "out of scope"?

NO

YES

Create a Prime PCO

Add Prime PCOs to COR

Create a Change Order Request (COR)

Review Change Order Request (COR)

REJECT

APPROVE

Create a Change Order Request (COR)

Create a Commitment Change Order (CCO)

Add approved CORs to CCO

Review and Respond to a CCO

REJECT

APPROVE

Create a Prime Contract Change Order (PCCO)

Review Prime Contract Change Order (PCCO)

REJECT

APPROVE

LEGEND

General Contractor
Owner/CM
Subcontractor
--- Optional Step

Coordination Issues

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Commitments

Configure Advanced Settings: Commitment

Create a Commitment

Create a Commitment with DocuSign

Create a Purchase Order

Create a Subcontract

Edit Advanced Settings

Add Schedule of Values

Email a Commitment

Send a Commitment to ERP Integrations for Accounting Acceptance

Approve and Sign a Commitment Contract

Create a Requisition

Add Payments Issued

LEGEND

- General Contractor
- Owner/CM
- Subcontractor
- Optional Step
Daily Log

Daily Log Workflow

Click a box below to view the related tutorial.
Collaborator Daily Log Workflow

Documents

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Drawings

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Forms

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Incidents

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Inspections

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Invoicing

Meetings

Create a Meeting

Click a box below to view the related tutorial.
Create a Meeting Template

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Observations

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Photos

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Prime Contract

Click a box below to view the related tutorial.
Punch List

Click a box to view the related tutorial:
RFIs

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Schedule

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Specifications

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Submittals

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Timesheets

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