Interactive Workflow Diagrams

Select a tool to view its interactive workflow diagram.

- **Project Level**
  - Bidding
  - Budget

- **Change Events**
  - 1-Tier Change Orders
  - 2-Tier Prime Contract Change Orders
  - 3-Tier Prime Contract Change Orders

- **Coordination Issues**
- **Commitments**
- **Daily Log**
  - Daily Log Workflow
  - Collaborator Daily Log Workflow

- **Documents**
- **Drawings**
- **Forms**
- **Incidents**
- **Inspections**
- **Invoicing**

- **Meetings**
  - Create a Meeting
  - Create a Meeting Template

- **Observations**
- **Photos**
- **Prime Contract**
- **Punch List**
- **Requisitions**
- **Reports**
- **RFIs**
- **Schedule**
- **Specifications**
- **Submittals**
- **Timesheets**
Company Level

Prequalification Portal

Prequalifications

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Project Level
Bidding
Change Events
1-Tier Change Orders
2-Tier Prime Contract Change Orders
1 Alternative ways to create a change event...

Create an RFQ?

Create a CCO from a Change Event...

Create RFQs from a Change Event...

Does the subcontractor have...

Respond to an RFQ as...

Respond to an RFQ on Behalf of...

Review RFQ Responses

Is change in scope with owner...

Create a Prime Potential Change Order (PCO)...

Email a Potential Change Proposal...

Did the owner reply with...

Add PCOs to PCCO

Approve or Reject CCOs

Create a Prime Contract Change Order (PCO)...

https://support.procore.com/references/interactive-workflow-diagrams

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13
3-Tier Prime Contract Change Orders
Daily Log

Daily Log Workflow

Collaborator Daily Log Workflow
Does the purchase order or subcontract have...

Add an 'Invoice Contact' with the Co...

How do you want to create the c...

AUTOMATIC MANUAL

Create Automatic Billi...

Create Manual Billing...

Who will create the new invoice...

INVOICE CONTACT INVOICE ADMINISTRATOR

Send an 'Invite to...

Does the invoice contact want t...

RECEIVE EMAIL

ACCEPTED DECLINED END

Accept or Decline an '

Submit a New Invoice...

Create a New Invoice o...
Meetings

Create a Meeting

- Do you want to create a new meeting using a template?
  - Yes: Create a Meeting from a Template
  - No: Create a Meeting

  CUSTOMIZE THE AGENDA

  Add a Meeting Category

  Define the Meeting's Agenda & Items

  Add a Meeting Item

  Distribute Meeting Agenda

  Add Meeting to your Personal Calendar

  Record the Meeting Attendance

  Add Meeting Minutes

  Copy Meeting Minutes from Previous Meeting

  Create a Meeting Category

  Add a Meeting Item

  Reorder Meeting Categories and Items

Live Meeting

- Convert Meeting from Agenda to Minutes Mode
- Distribute Meeting Minutes
- Create a Follow-up Meeting
Create a Meeting Template

Observations
START

Do you want to create a punch...

YES

Create a Project...

Create a Company Level P...

NO

Create a Punch List It...

Send Punch List Item to P...

Approved?

Send Punch List Item to...

Return Punch List Item t...

Send Punch List Item to P...

Approved?

Send Punch List Item to...

Return Punch List Item t...

Approved?
Requisitions
START

Does the purchase order or subcontract have...

Add an 'Invoice Contact' with the Co...

How do you want to create the c...

AUTOMATIC MANUAL

Create Automatic Billi...
Create Manual Billing...

Who will create the new invoice...

INVOCIE CONTACT INVOCIE ADMINISTRATOR

Send an 'Invite to...

Does the invoice contact want t...

RECEIVE EMAIL

Accept or Decline an '...

ACCEPTED DECLINED END

Submit a New Invoice...

Create a New Invoice o...
Reports

Do you want to clone an existing custom report?

YES

Clone a Custom Project Report

NO

Create a Custom Project Report

Create a Calculated Column in a Custom Report

Aggregate Data in a Custom Report

Distribute a Snapshot of a Custom Project Report

Add a Visual to a Custom Project Report

Share a Custom Project Report

Create a Dashboard

Share a Dashboard
**LEGEND**
- RFI Manager
- RFI Creator
- RFI Assignee
- RFI Forwardee

**START**

- Do you have 'Admin' or 'Standard'?
  - 'Standard'
    - Create an RFI as a 'Stan...
      - 'DRAFT'
        - Review the RFI
          - 'OPEN'
            - CREATE & OPEN
  - 'Admin'
    - Create an RFI as an 'A...
      - 'OPEN'

**REVIEW & REPLY**

- Do you have all the information?
  - No
    - Do you want to forward the RFI?
      - Yes
        - Forward an RFI...
          - Ball in Court (BIC)...
      - No
        - Do you want to add other as...
          - Yes
            - Add Assignees to an RFL...
              - Assignees Added
          - No
            - Reply to an RFI
              - Ball in Court (BIC)...
  - Yes
    - Choose an 'Official' Res...
      - Ball in Court (BIC)...

**REVIEW & REPLY**
Schedule

Specifications
Prequalification Portal

START

View a Prequalification...

Edit a...

Submit a Prequalification...

Did you receive a "Change..."

Respond to a Change Req...

No further...

END