Create a Potential Change Order (PCO) with DocuSign

Objective
To create a Prime Contract Change Order with DocuSign.

Background
If you have a DocuSign account, you are able to track the status of a signed document in Procore. You can receive, review, and return their signed contracts online, at any time and from any Internet-enabled device.

If you do not have DocuSign enabled, see "Enable the DocuSign Integration on a Project" in the See Also section below.

Things to Consider

- **Required User Permission:**
  - 'Admin' level permission on the project's Prime Contract tool

- **Requirements:**
  - The signature initiator in Procore must have an active DocuSign account. See "How do I get a DocuSign account?" and "Do owners and subcontractors need a DocuSign account?" in the See Also section below.

- **Prerequisites:**
  - The Procore + DocuSign Integration must be enabled on the project. See "Enable the DocuSign Integration" in the See Also section below.

- **Additional Information:**
  - Once you have signed in to DocuSign through Procore, you will not need to sign in again.

Steps

- For projects not using the change events tool
- For projects using the change events tool

**For projects not using the Change Events tool**

1. Navigate to the project's Prime Contract tool.
2. Click + Create Potential CO.
3. Mark the Sign with Docusign checkbox.
4. Fill out the related fields. See "Create a Potential Change Order (PCO)" in the See Also section below.

5. Click Complete with DocuSign at the bottom of the page.

6. If you have not logged into DocuSign from Procore before, complete the following steps:
   a. Enter your DocuSign email address.
      
      ![DocuSign login](https://support.procore.com/products/online/user-guide/project-level/prime-contract/tutorials/create-a-potential-change-order...
      
      Once you are in DocuSign, Procore's contract PDF will pre-populate as a document in DocuSign, or you can choose to add your own document.

7. Upload documents by doing one of the following:
   a. Upload
   b. Use a Template
   c. Get From Cloud

8. If you are not using a custom form, DocuSign will pre-populate recipient roles. If you choose to use the pre-populated roles, then DocuSign will pre-place the signing tags in the correct position.
10. Click **Send** to send the document for signature. Once the DocuSign workflow is complete, the change order status will change to "Approved." (If Procore Workflow is not being used).  
*Note:* You can still manually edit the change order status if necessary.

**For projects using the Change Events tool**

1. Complete Steps #1-6 in "Create a Prime PCO From a Change Event" in the See Also section below.
2. Navigate to the change event you created a Prime PCO for.
3. In the Prime PCO section of that change event, click **View** next to the Prime PCO you want signed with DocuSign.
4. Click **Edit**.
5. Mark the Sign with DocuSign checkbox.
6. Fill out the related fields. See Create a Potential Change Order (PCO) in the See Also section below.
7. Complete Steps #5-10 above.

**See Also**

- [DocuSign](#)
- [Enable the DocuSign Integration on a Project](#)
- [How do I get a DocuSign account?](#)
- [Do owners and subcontractors need a DocuSign account?](#)
- [Create a Prime PCO From a Change Event](#)
• Create a Potential Change Order (PCO)