



AUGUST 2025

PROCORE FINANCIAL MANAGEMENT

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FINANCIAL KICK-OFF

When Skyline has been awarded a project, it is the Operations Team's responsibility to initiate the process of converting the Opportunity to an Active Project. This process is crucial as it allows the accounting team to set up the project financials (original Prime Contract Schedule of Values (SOV) and original cost budget) in Sage and Procore. Having the project set up in Sage allows Branding to move the project to the company backlog report in Salesforce (i.e. from the bid list to the resource schedule) and allows the Operations Team to start making formal Commitments to subcontractors and material suppliers.

The first step in this process is to complete the Job Start and Financial Kick-Off Workbook and submit them to your PX and Accounting. This form is to be completed as soon as the project is officially awarded to Skyline by the client (ideally with obtaining the fully executed Contract or Letter of Intent) and before the Internal Job Kickoff Meeting with the General Superintendent, Project Superintendent, PM, APM & PE. If a contract is not fully executed yet and the project team requires project financials set up in Procore/Sage, you must contact your PX for an "Exception." Upon approval, the project financials will be set up without a fully executed contract in hand. This fully completed form, including all labor hours, General Requirements, internal holds, and self-performed Allowances, should be completed, reviewed and understood by the entire Skyline project team during the Internal Job Kickoff Meeting. Utilize the "Super Hours Report" section of the form, PDF it, and email it to the Project Superintendent for their records to reference and track throughout construction.

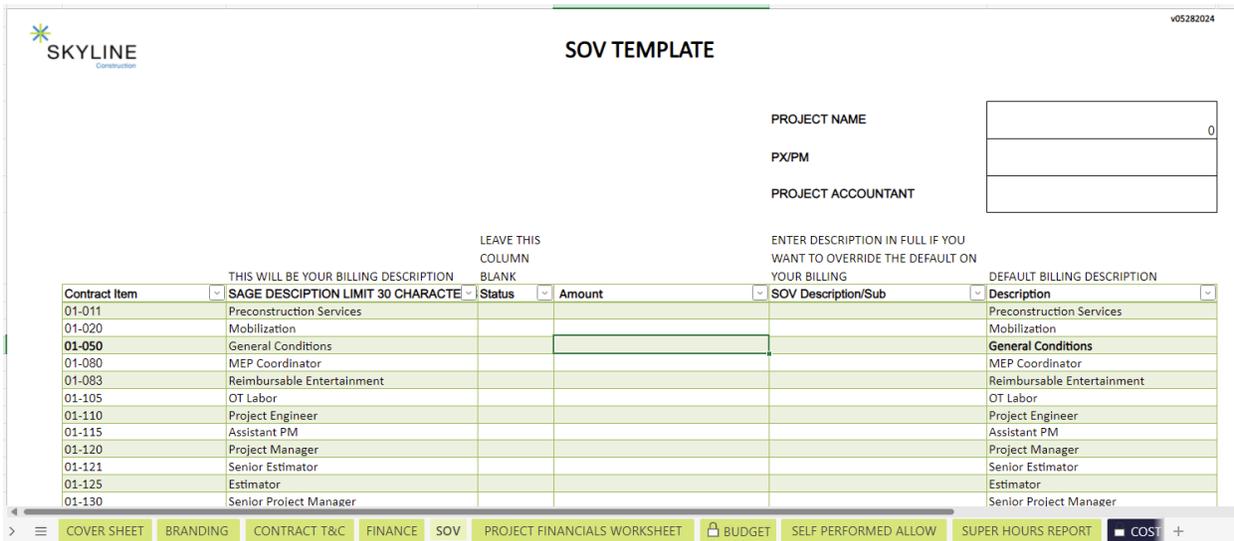
NOTE: Please consult the "Job Start and Financial Kick-Off Workbook" User Guide for a full overview of this workbook.

ORIGINAL SOV & BUDGET UPLOAD

1.1 ORIGINAL SOV

ORIGINAL SCHEDULE OF VALUES ON YOUR G702/G703 PAY APPLICATION:

The “SOV” tab is where you will create the Original Schedule of Values for your billing. Find the appropriate Contract Item No and related description that most closely aligns with your Contract Proposal and fill in the Amount. If you need the billing line to read any differently than the “SAGE DESCRIPTION LIMIT 30 CHARACTERS” column description, write the full description in its entirety in the “SOV Description/Sub” column. **Do not overwrite anything in the first three or last columns.**



SOV TEMPLATE

PROJECT NAME: [] 0

PX/PM: []

PROJECT ACCOUNTANT: []

Contract Item	THIS WILL BE YOUR BILLING DESCRIPTION SAGE DESCRIPTION LIMIT 30 CHARACTERS	LEAVE THIS COLUMN BLANK	Amount	ENTER DESCRIPTION IN FULL IF YOU WANT TO OVERRIDE THE DEFAULT ON YOUR BILLING	DEFAULT BILLING DESCRIPTION
	Status			SOV Description/Sub	Description
01-011	Preconstruction Services				Preconstruction Services
01-020	Mobilization				Mobilization
01-050	General Conditions				General Conditions
01-080	MEP Coordinator				MEP Coordinator
01-083	Reimbursable Entertainment				Reimbursable Entertainment
01-105	OT Labor				OT Labor
01-110	Project Engineer				Project Engineer
01-115	Assistant PM				Assistant PM
01-120	Project Manager				Project Manager
01-121	Senior Estimator				Senior Estimator
01-125	Estimator				Estimator
01-130	Senior Project Manager				Senior Project Manager

Navigation: COVER SHEET | BRANDING | CONTRACT T&C | FINANCE | **SOV** | PROJECT FINANCIALS WORKSHEET | BUDGET | SELF PERFORMED ALLOW | SUPER HOURS REPORT | COST

1.2 ORIGINAL BUDGET / SAGE ESTIMATE

Complete the “Project Financials Worksheet” tab to create your original Procore budget (Sage calls it the Original Estimate). You can reference your billing outline (cells in green) to create your estimated cost budget here. Fill in the blue cells to outline your intended spend on the job. There are three main worksheets to make up your cost budget. Skyline utilizes a Cost Budget.

- 6.0 – General Conditions
- 7.0 – General Requirements/Technical Requirements
- 8.0 – Buyout Worksheet (Scope of Work)

All of the data you enter on the “Project Financials Worksheet” will populate the “Budget” tab, which the Accounting Team will use to create your “Original Estimate” in Sage and “Original Budget” in Procore.

Procure BUDGET / Sage Estimate									
COST CODE	DESCRIPTION	Units/Hour	Labor	Material	Subcontra	Other	Allowance	Hold	TOTAL
01-011	Preconstruction Services	-	-	-	-	-	-	-	-
01-020	Mobilization	-	-	-	-	-	-	-	-
01-050	General Conditions	-	-	-	-	-	-	-	-
01-080	MFP Coordinator	-	-	-	-	-	-	-	-
01-083	Reimbursable Entertainment	-	-	-	-	-	-	-	-
01-105	OT Labor	-	-	-	-	-	-	-	-
01-110	Project Engineer	-	-	-	-	-	-	-	-
01-115	Assistant Project Manager	-	-	-	-	-	-	-	-
01-120	Project Manager	-	-	-	-	-	-	-	-
01-121	Senior Estimator	-	-	-	-	-	-	-	-
01-125	Estimator	-	-	-	-	-	-	-	-
01-130	Senior Project Manager	-	-	-	-	-	-	-	-
01-150	Project Executive	-	-	-	-	-	-	-	-
01-200	Foreman	-	-	-	-	-	-	-	-
01-205	Assistant Superintendent	-	-	-	-	-	-	-	-
01-210	Field Engineer	-	-	-	-	-	-	-	-
01-220	Superintendent	-	-	-	-	-	-	-	-
01-230	Senior Superintendent	-	-	-	-	-	-	-	-
01-260	General Superintendent	-	-	-	-	-	-	-	-
01-271	Project Coordinator	-	-	-	-	-	-	-	-
01-272	Project Accountant	-	-	-	-	-	-	-	-
01-273	Scheduler	-	-	-	-	-	-	-	-
01-274	Job Photos	-	-	-	-	-	-	-	-
01-275	Reproductions	-	-	-	-	-	-	-	-
01-276	Postage & Messenger	-	-	-	-	-	-	-	-
01-277	Site Office / Supplies	-	-	-	-	-	-	-	-
01-283	Jobsite IT Connection	-	-	-	-	-	-	-	-
01-284	Data Service	-	-	-	-	-	-	-	-
01-294	Travel	-	-	-	-	-	-	-	-
01-295	Parking	-	-	-	-	-	-	-	-
01-400	Quality Control	-	-	-	-	-	-	-	-
01-452	Testing & Inspection Services	-	-	-	-	-	-	-	-
01-500	General Requirements	-	-	-	-	-	-	-	-
01-501	Temp Facilities & Controls	-	-	-	-	-	-	-	-
01-511	Temp Light & Power	-	-	-	-	-	-	-	-
01-522	Temporary Toilets	-	-	-	-	-	-	-	-
01-540	Finish Protection	-	-	-	-	-	-	-	-
01-542	Scaffold & Temporary Platforms	-	-	-	-	-	-	-	-
01-546	Safety Manager	-	-	-	-	-	-	-	-
01-548	Jobsite Safety Labor	-	-	-	-	-	-	-	-
01-549	Safety	-	-	-	-	-	-	-	-
01-560	Temp Barrier & Enclosure	-	-	-	-	-	-	-	-
01-580	Project Signage	-	-	-	-	-	-	-	-
01-700	Technical & Site Requirements	-	-	-	-	-	-	-	-
01-740	Construction Cleaning	-	-	-	-	-	-	-	-
01-741	Waste Management/Disposal	-	-	-	-	-	-	-	-
01-742	Final Cleaning	-	-	-	-	-	-	-	-
01-745	Dumpsters & Trash Removal	-	-	-	-	-	-	-	-
01-850	Small Tools & Equipment	-	-	-	-	-	-	-	-
01-993	COVID Site Protocols	-	-	-	-	-	-	-	-
02-050	Existing Conditions Assessment	-	-	-	-	-	-	-	-
02-220	Site Surveying	-	-	-	-	-	-	-	-
02-250	Materials Testing	-	-	-	-	-	-	-	-
02-300	Abatement	-	-	-	-	-	-	-	-

NOTE: Please consult the “Job Start and Financial Kick-Off Workbook” User Guide for a full overview of this workbook.

PROCORE PROJECT FINANCIAL SET-UP

1.3 PROCORE REQUIRED DATA ENTRY

FOR PROJECT CONTRACT CHANGE ORDERS AND SUBCONTRACTS.

PRIME CONTRACT TOOL:

Prime Contracts > Edit Prime Contract

Edit Prime Contract #10-24-TEST

General Information

Sign with DocuSign

Contract #
10-24-TEST

Status
APPROVED

Contractor *
Skyline Construction - Bay Area

Owner/Client
Skyline Enterprises

Executed *

Architect/Engineer *
McKenzie Schroeder

Title
Test-Training Project

Default Retainage
0 %

Description

Contract Dates

Start Date
05 / 09 / 2024

Substantial Completion Date
mm / dd / yyyy

Contract Date *
05 / 22 / 2024

Signed Contract Received Date *
mm / dd / yyyy

Contract Termination Date
mm / dd / yyyy

PROJECT ADMIN TOOL:

COMMITMENT DETAILS

Internal Project Manager
Natasha Gonzales (Skyline Enterprises)

Prime Contractor (If Other Than The Contractor)
N/A

Construction Lender Name
N/A

Construction Lender Address
N/A

Building Owner Legal Entity
Jimmy M Worldwide LCC

Building Owner Address
123 Parkway Blvd, Chicago, IL 60607

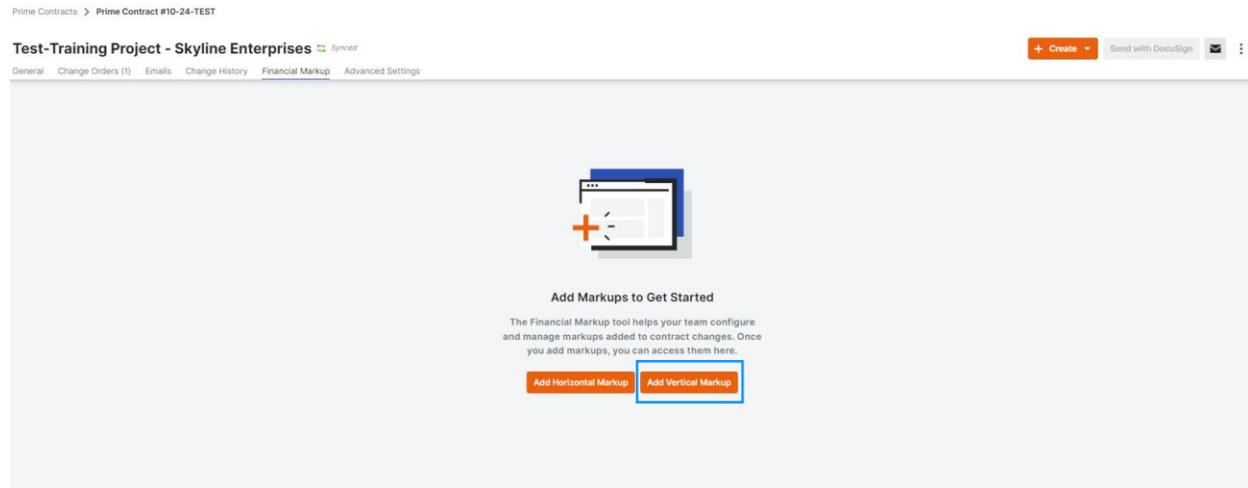
Exhibit J - Additional Insurance Requirements

B I U [Text formatting icons] 12pt

copy and paste full project and Skyline insurance requirements here.

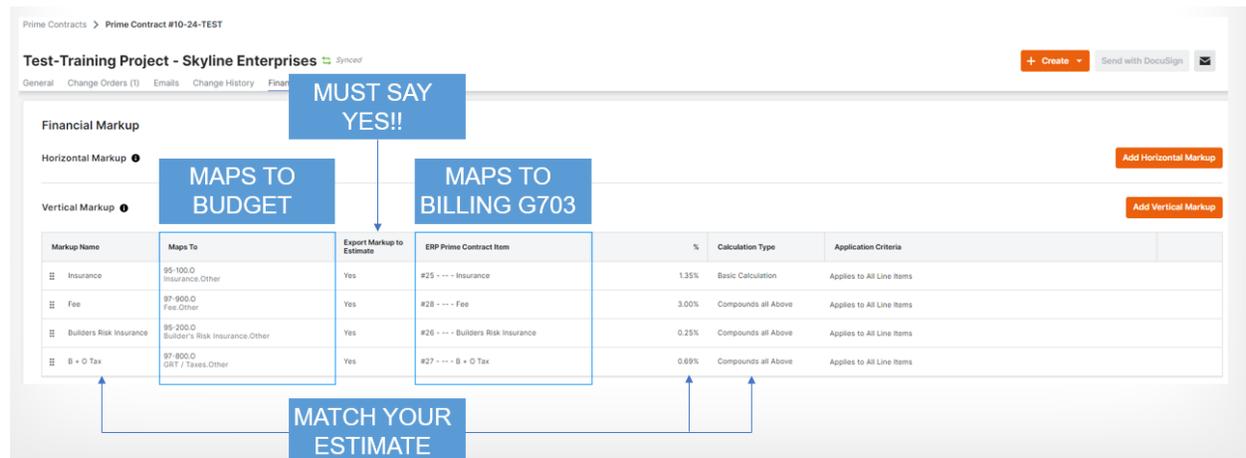
1.4 SET UP FINANCIAL MARKUPS

Navigate to your Prime Contract, select Financial Markups, and select “New Vertical Markup.” You can set Financial Vertical Markups at a Prime Contract or PCO Level. ****Best Practice to set at Prime Contract Level. Keep in mind, you can always delete Markups at the PCO level.**



KEEP IN MIND:

- Match the specific markup and order of the markups that you have in your Contract Proposal.
- ALWAYS make sure the “Export Markup to Estimate” says “YES!!”
- Compound markups to match your Contract Proposal.
- Applies to ALL Line Items is your default unless markups only apply to certain contract items per your Owner Contract.



Markup Name	Maps To	Export Markup to Estimate	ERP Prime Contract Item	%	Calculation Type	Application Criteria
Insurance	95-100.0 Insurance.Other	Yes	#25 --- Insurance	1.35%	Basic Calculation	Applies to All Line Items
Fee	97-900.0 Fee.Other	Yes	#28 --- Fee	3.00%	Compounds all Above	Applies to All Line Items
Builders Risk Insurance	95-200.0 Builder's Risk Insurance.Other	Yes	#26 --- Builders Risk Insurance	0.25%	Compounds all Above	Applies to All Line Items
B + O Tax	97-800.0 BET / Taxes.Other	Yes	#27 --- B + O Tax	0.69%	Compounds all Above	Applies to All Line Items

1.5 PROCORE / SAGE INTEGRATION

Each Procore project will be integrated with a corresponding Sage 300 project.

How does Procore connect to Sage 300?

- Procore is connected to Sage via hh², a synchronization application. This app will keep the data in Procore and Sage in sync.

What does the Accounting team need to be able to facilitate the data syncs?

- Accounting will need to download and install the hh² application. This app will run in the background as a web service.

How does the data move between Procore and Sage?

- Updates to a project (i.e. change orders, budget changes, etc) will first need to be sent to the ERP Integrations tool. This will usually be accomplished by selecting a “Re-send to ERP” button. Once sent, an Accounting Approver will need to accept the changes to send them to Sage.

Who can authorize a sync?

- Individuals designated as “Accounting Approvers” will be able to approve exports to Sage.

1.6 DATA FLOW BETWEEN SAGE AND PROCORE

Original Prime Contract Amount	Sage	>>	Procore
Prime Contract Change Orders	Sage	<<	Procore
Original Budget Amount	Sage	>>	Procore
Budget Changes	Sage	<<	Procore
JTD Costs	Sage	>>	Procore
Commitments Invoices*	Paperless	<<	Procore

*Procore’s Invoicing directly syncs with Paperless. We are NOT using the Procore to Sage direct ERP Integration.

1.7 ERP SYMBOLS



Item sent to ERP and is waiting for Accounting to accept into Sage.



Item was sent to ERP but then retrieved BEFORE Accounting had a chance to accept, OR Accounting has rejected the ERP sync.



Item has been sent to ERP and Accounting has been accepted into Sage. Item is now synced with Sage. This sync cannot be canceled, deleted, or undone. Any change now must be made through another Change Event/PCO/PCCO.

COMMITMENTS TOOL

Subcontracts are Skyline’s formal approval of a subcontractor’s proposal to proceed with their work at an agreed upon price. Issuing a subcontract gives subcontractors terms and conditions to abide by throughout the project.

Procure’s Commitment Tool will be the vehicle to create and manage Subcontracts and log and manage PSAs and POs for the project. You will use the Procure Commitment Tool to create and execute Skyline’s “Standard Subcontract” and “MSA Work Authorization”. PSAs and POs will be requested from our Legal Department (accompanied by their template request form) and fully executed through DocuSign outside of Procure. Once you obtain the fully executed PSA / PO, then you can use the Commitment Tool to save the fully executed document and enter in the value and trade code for the contract and sync the data with Sage.

Confirm with your PM regarding scope, appropriate exhibits, and cost prior to issuing subcontracts.

1.8 CONFIGURE SETTINGS

Commitment settings have been set to this default. Do not enable Purchase Orders. You will need to request the PO template from Legal.

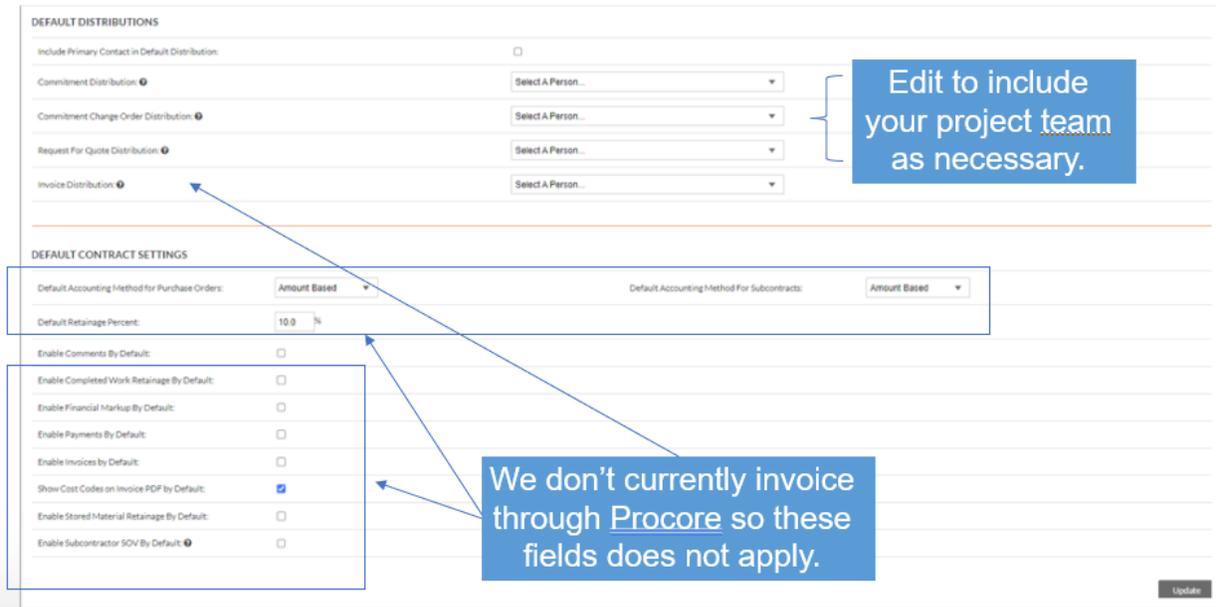
Commitment Settings

CONTRACT CONFIGURATION

Contracts Private By Default:	<input checked="" type="checkbox"/>
Enable Purchase Orders:	<input checked="" type="checkbox"/>
Enable Subcontracts:	<input checked="" type="checkbox"/>
RFQs Will Be Due After:	<input type="text" value="5"/> working day(s) by default. Define the project’s Working Days in the Admin Tool.
Number of Commitment Change Order Tiers:	<input type="text" value="1"/>
Allow Standard Level Users to Create CCOs:	<input type="checkbox"/>
Enable Always Editable Schedule of Values:	<input type="checkbox"/>
Enable Field Initiated Change Orders:	<input type="checkbox"/>
Show Financial Markup Application Criteria on Change Order PDF exports: <small>Details include cost codes and cost types specified in the financial markup.</small>	<input type="checkbox"/>

CONTRACT DATES

The Commitments Tool’s Contract Dates Have Been Moved
You can no longer configure contract dates for the Commitments tool on this page because it has been moved to the Company Admin tool. Please go to the Contract Fieldsets page in the Company Admin tool to make changes.



1.9 SUBCONTRACT TYPES

There are 5 main commitment types:

1. Standard Subcontract
2. Master Service Agreement Work Authorization (MSA WA)
3. Purchase Order
4. Professional Service Agreement
5. Limited Subcontract

The first two agreement types are generated in Procore by data entry in the Commitment Tool. The last three are documents you must ask our Legal Department for. Once they are fully executed outside of Procore, you can attach them to the commitment you outline for them in Procore and sync to Sage for financial tracking.

Each Trade Partner we want to hire who will perform work on our jobsite will receive either a Standard Subcontract or, if we have signed a Master Service Agreement with them, a Master Service Agreement Work Authorization (MSA WA). Please consult your region's MSA list, if applicable, to determine which type of Subcontract to issue to our Trade Partner.

A Purchase Order should be used if we are purchasing material only, with no labor.

A Professional Service Agreement should be used if we require work that does not include site labor, i.e., engineering or consulting work.

STANDARD SUBCONTRACT TYPE

All of the fields on this first page come from data entered into the Subcontract in Procore.

Exhibits A-E are static and attached to the export file. Exhibits F and G are populated by the data you enter in the Subcontract in Procore. Exhibit J is populated by data you enter in the Admin Tool.

Exhibits H, I, K, L should be created and included in the Attachment field to become part of this Subcontract (if applicable).

If any of the Exhibits H, I, K, or L are not applicable for this Subcontract, you select “No” in the drop down list in the commitment and it will overwrite the front page’s Exhibit title to read “Not Applicable”.



Skyline Construction Inc.
505 Sansome Street, 7th Fl
San Francisco, CA 94111
License #727837

STANDARD SUBCONTRACT AGREEMENT		
Subcontractor ("Subcontractor"):	Name of Project ("Project"):	Skyline Job No:
	Effective Date of this Subcontract:	
	CSI Code:	
Contact Person:		

A. Project Overview

1. Subcontract No.:
2. Name of Project:
3. Project Address:
4. Contractor: SKYLINE COMMERCIAL INTERIORS, INC. D/B/A SKYLINE CONSTRUCTION INC. ("Contractor")
5. Skyline Project Manager:
6. Name of Client ("Owner"):
7. Address of Client:
8. Name of Architect ("Architect"):
9. Architect Contact:
10. Architect Address:
11. Name of Building Owner:
12. Building Owner's Address:
13. Construction Lender (if applicable):
14. Construction Lender Address:
15. Date of Prime Contract with Owner ("Prime Contract"):
16. Name of Prime Contractor (if other than Contractor) ("Prime Contractor"):
17. Subcontract Price ("Subcontract Price"):

B. Exhibits

This Standard Subcontract includes the following exhibits that are collectively referred to as the "Exhibits" and incorporated herein.

- Exhibit A – Conditional Waiver and Release on Progress Payment
- Exhibit B – Unconditional Waiver and Release on Progress Payment
- Exhibit C – Conditional Waiver and Release on Final Payment
- Exhibit D – Unconditional Waiver and Release on Final Payment
- Exhibit E – Subcontractor's Application for Payment
- Exhibit F – Subcontractor's Scope of Work
- Exhibit G – General Project Requirements
- Exhibit H – Project Schedule
- Exhibit I – Plans & Specifications
- Exhibit J – Additional Insurance Requirements
- Exhibit K – Stored Materials
- Exhibit L – Any written amendment(s) to Agreement signed by both parties

MASTER SERVICE AGREEMENT WORK AUTHORIZATION (MSA WA) SUBCONTRACT TYPE

All of the fields on this first page come from data entered into the Subcontract in Procore, same as the Standard Subcontract Type with one additional field, **Date of Master Subcontract Terms and Conditions between Contractor and Subcontractor (the “Master Agreement”)**:. To find this date, please consult the MSA List for your region. On that list, it will site the “Contract Date” of the MSA. That is the date you will enter into the corresponding field in Procore’s Subcontract.

Exhibits A-E are static and attached to the export file. Exhibits F and G are populated by the data you enter in the Subcontract in Procore. Exhibit J is populated by data you enter in the Admin Tool. Exhibits H, I, K should be created and included in the Attachment field to become part of this Subcontract (if applicable).

If any of the Exhibits H, I, K, or L are not applicable for this Subcontract, you select “No” in the drop down list in the commitment and it will overwrite the front page’s Exhibit title to read “Not Applicable.”



Skyline Construction Inc.
505 Sansome Street, 7th Fl
San Francisco, CA 94111
License #727837

Subcontract Work Authorization

For Use Only with Master Subcontract Terms and Conditions

This Subcontract Work Authorization (“Work Authorization”) is entered between Contractor and Subcontractor for performance of Subcontractor’s Work on the Project, as defined below as of the date Contractor signs this Work Authorization.

Subcontractor (“Subcontractor”):	Name of Project (“Project”):	Skyline Job No:
	Effective Date of this Subcontract:	
	CSI Code:	
	Date of Master Subcontract Terms and Conditions between Contractor and Subcontractor (the “Master Agreement”):	
Contact Person:		

A. Project Overview

1. **Subcontract No.:**
2. **Name of Project:**
3. **Project Address:**
4. **Contractor:** SKYLINE COMMERCIAL INTERIORS, INC. D/B/A SKYLINE CONSTRUCTION INC. (“Contractor”)
5. **Skyline Project Manager:**
6. **Name of Client (“Owner”):**
7. **Address of Client:**
8. **Name of Architect (“Architect”):**
9. **Architect Contact:**
10. **Architect Address:**
11. **Name of Building Owner:**
12. **Building Owner’s Address:**
13. **Construction Lender (if applicable):**
14. **Construction Lender Address:**
15. **Date of Prime Contract with Owner (“Prime Contract”):**
16. **Name of Prime Contractor (if other than Contractor) (“Prime Contractor”):**
17. **Subcontract Price (“Subcontract Price”):**

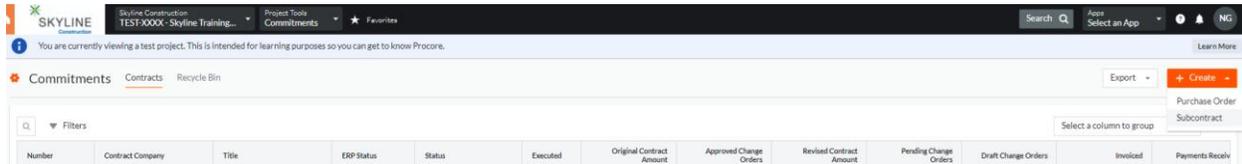
B. Exhibits

This Work Authorization includes the following exhibits that are collectively referred to as the “Exhibits” and incorporated herein.

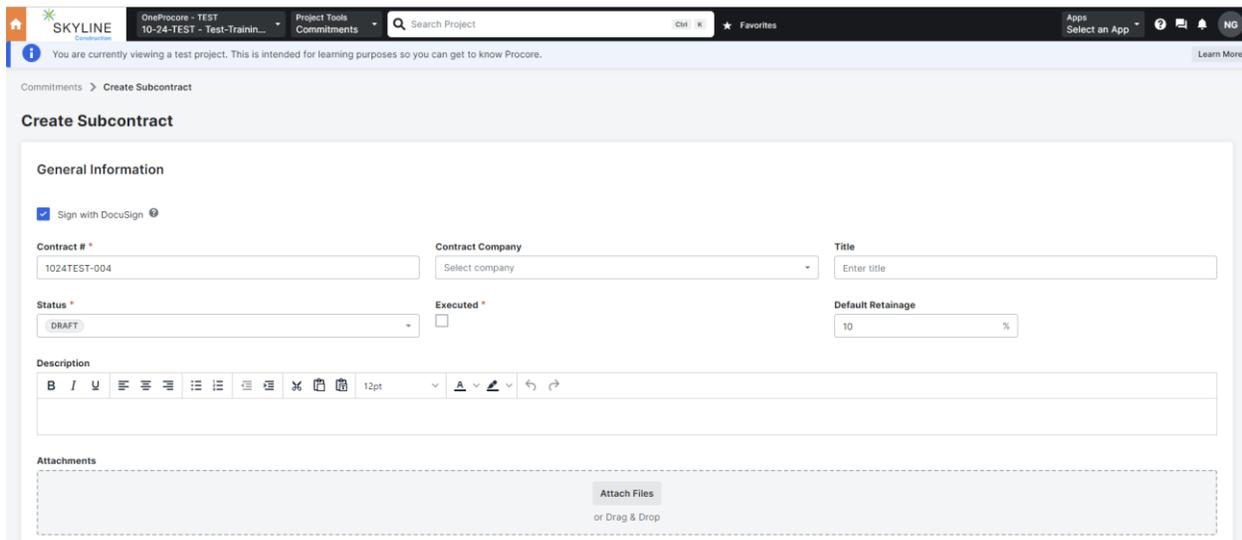
- Exhibit F – Subcontractor’s Scope of Work
- Exhibit G – General Project Requirements
- Exhibit H – Project Schedule
- Exhibit I – Plans & Specifications
- Exhibit J – Additional Insurance Requirements
- Exhibit K – Stored Materials

1.10 CREATE A SUBCONTRACT

1. Navigate to your Commitments Tool in Procore.
2. Click +Create and select Subcontract.



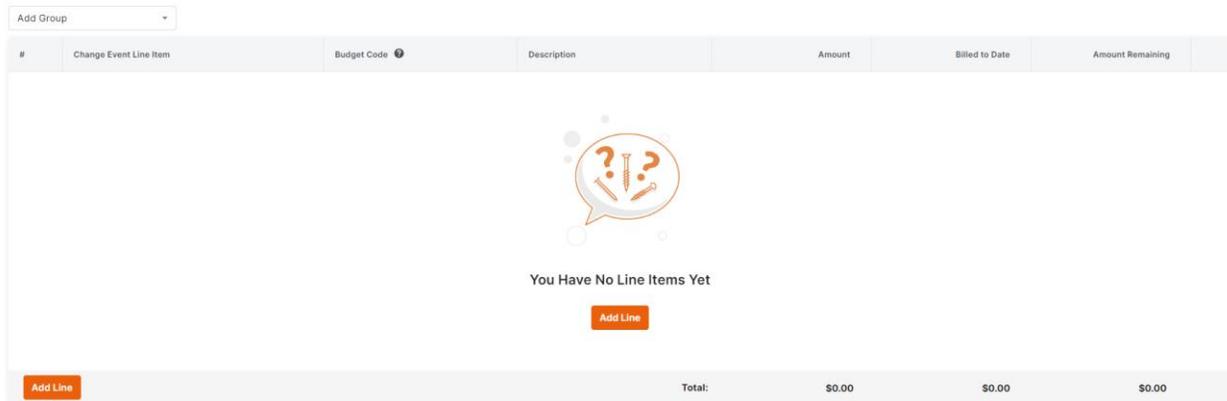
3. Fill in the following fields:



Contract #	Overwrite your first subcontract numbering to be the job number (no dashes), then a dash and then 001. Ex. "10241020-001". Your subsequent numbering will match. Do not number your subcontracts any other way.
Contract Company	Select the company to which you are issuing the subcontract. Make sure you select a company that is ERP synced!! If the company you want to write a subcontract to is not ERP synced, use the Correspondence Tool to request they be added to the Procore database. <i>See Company Add Request Correspondence process.</i>
Title	Enter the title of the subcontract. "HVAC Subcontract", "Drywall Subcontract", etc.
Status	Select the Status: Start with the top three statuses. <ul style="list-style-type: none"> ● Draft ● Out for Bid ● Out for Signature ● Approved ● Complete ● Terminated

	<ul style="list-style-type: none"> • Void <p><i>NOTE: List the status of “Out for Signature”, then send through DocuSign. When the document is fully executed, DocuSign will automatically change the status to “Approved”.</i></p>
Executed	Indicate whether the subcontract is fully executed (use this only for POs, PSAs, and Limited Subcontracts). When you execute a Standard Subcontract or an MSA WA through DocuSign via Procore, this field will automatically update when the “Envelope” is fully executed.
Default Retainage	Enter the default retainage if not already populated. This will be the default retainage used when Invoicing through Procore.
Description	You can enter a brief description for your use only. This field does not populate anywhere else.
Attachments	<p>For Standard Subcontract and MSA WA, drag and drop your Exhibits H, I, K, L (if applicable and any other documents or Exhibits you wish to be included in the final DocuSign envelope.</p> <p>For POs, PSAs, and Limited Subcontracts that are issued and executed outside of Procore, you will drag and drop these fully executed documents here for reference.</p>

Schedule of Values



Schedule of Values	<p>Click “Add Line” and enter the correct Budget Code associated with this scope of work. Only add one line per Subcontract DO NOT ITEMIZE YOUR SUBCONTRACT SOV. If you have one sub hired for multiple trades, Skyline policy is to issue one subcontract per trade. This ensures easy processing of Sub Invoices and also allows for clean billing and waiver backup. If your sub would like itemization, show the breakout in your “Subcontractor’s Scope of Work” section and/or in the SSOV.</p> <p><i>NOTE: Always use Cost Type S for subcontracts (Standard, MSA WA, and Limited) and O or PSAs and POs.</i></p>
--------------------	---

Contract Dates

Contract Date * Signed Contract Received Date

mm / dd / yyyy mm / dd / yyyy

Contract Privacy

Using the privacy setting allows only project admins and the select non-admin users access.

Private

Access for Non-Admin Users Allow these non-admin users to view the SOV items.

Invoice Contacts

[Please select a Contract Company first](#)

Contract Dates	The Contract Date entered here will be the “Effective Date of the Subcontract” for the Standard and MSA WAs. For POs, PSAs, and Limited Subcontracts, enter in the date of the agreement found on your fully executed contract.
Signed Contract Received Date	Enter this date if you wish for POs, PSAs, and Limited Subcontracts. Otherwise leave blank. DocuSign will use this field with Standard Subcontracts and MSA WAs.
Contract Privacy	Always mark Private
Access for Non-Admin Users	Add the Subcontract Contact here. They will need to be listed here to accept RFQs.
Allow these non-admin users to view the SOV items.	Check this box if you want any of the users above to view the SOV.
Invoice Contacts	The person listed here should be the project accountant for the sub you are writing the subcontract for.

Additional Information

Subcontractor Contact Person

Signed MSA Date (for Master Subcontracts)

Subcontract Type

CSI Code

Early Pay Discount

Subcontract Contact Person	List your main point of contact for your sub. Usually the PM.
Subcontract Type	Select the appropriate subcontract type. <i>TIP: Type the first few letters on your region for a consolidated list.</i>

Subcontract Type

bay
✕

Bay Area Fully Executed Limited Subcontract

Bay Area Fully Executed PO

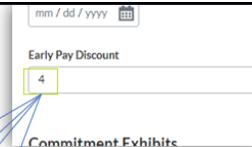
Bay Area Fully Executed PSA

Bay Area MSA Work Authorization

Bay Area Standard Subcontract

Signed MSA Date (for Master Subcontracts)	To find this date, please consult the MSA List for your region. On that list, it will site the “Contract Date” of the MSA. That is the date you will enter into the corresponding field in Procore’s Subcontract.
CSI Code	Enter in the CSI Code associated with your subcontract to assist you in sorting your commitments in the Commitments Dashboard. Or leave blank.
Early Pay Discount	The Early Pay Discount you enter in the “Early Pay Discount” field should be what your final negotiated amount is with the Subcontractor for that particular project. If left blank, the baseline amount will be what is written into the Standard Subcontract language.

The Early Pay Discount you enter in the “Early Pay Discount” field should be what your final negotiated amount is with the Subcontractor for that particular project. If left blank, the baseline amount will be what is written into the Standard Subcontract language.



ACCEND Standard Subcontract

PAGE 3

Subcontractor obligations to labor or materialmen then due, is a condition precedent to Subcontractor’s right to receive payment.

5.1.1 **Early Payment Discount.** The Parties agree, that as an incentive for Contractor to provide early payment to Subcontractor, Contractor shall have the right, in its sole discretion, to apply an **8%** discount (or other amount as agreed by Contractor and Subcontractor) on all Subcontractor invoices when paid with check dated and deposited into the mail on or before the 10th day of the month following the end of the period for which payment is due.

5.2 **Progress Payments.** Subcontractor shall furnish monthly applications for payment based on percentage of completion of Subcontractor’s Work that has been incorporated into the Project during that month, including any

UM (SCI Seattle) Standard Subcontract

PAGE 4

Subcontractor obligations to labor or materialmen then due, is a condition precedent to Subcontractor’s right to receive payment.

5.1.1 **Early Payment Discount.** The Parties agree, that as an incentive for Contractor to provide early payment to Subcontractor, Contractor shall have the right, in its sole discretion, to apply a **3%** (or other amount as agreed by Contractor and Subcontractor) discount on all Subcontractor invoices when paid with check dated and deposited into the mail, or electronically deposited, on or before the 10th day of the month following the end of the period for which payment is due.

5.2 **Progress Payments.** Subcontractor shall furnish monthly applications for payment based

Prevost Standard Subcontract

PAGE 4

Subcontractor’s right to receive payment.

5.1.1 **Early Payment Discount.** The Parties agree, that as an incentive for Contractor to provide early payment to Subcontractor, Contractor shall have the right to apply **4.5%** discount (or other amount as agreed by Contractor and Subcontractor) on all Subcontractor invoices when paid with check dated and deposited into the mail on or before the 20th day of the month following the end of the period for which payment is due.

5.2 **Progress Payments.** Subcontractor shall furnish monthly applications for payment based on

SCI (Bay Area) Standard Subcontract

PAGE 3

Subcontractor’s right to receive payment.

5.1.1 **Early Payment Discount.** The Parties agree, that as an incentive for Contractor to provide early payment to Subcontractor, Contractor shall have the right, in its sole discretion, to apply an **8%** discount (or other amount as agreed by Contractor and Subcontractor) on all Subcontractor invoices when paid with check dated and deposited into the mail on or before the 10th day of the month following the end of the period for which payment is due.

5.2 **Progress Payments.** Subcontractor shall furnish monthly applications for payment based

4. Next address the Commitment Exhibits as outlined below.

1.11 SUBCONTRACT EXHIBITS

Subcontracts have the following (but are not limited to) the following Exhibits:

1. Exhibit A – Conditional Waiver and Release on Progress Payment
2. Exhibit B – Unconditional Waiver and Release on Progress Payment

3. Exhibit C – Conditional Waiver and Release on Final Payment
4. Exhibit D – Unconditional Waiver and Release on Final Payment
5. Exhibit E – Subcontractor’s Application for Payment
6. Exhibit F – Subcontractor’s Scope of Work
7. Exhibit G – General Project Requirements
8. Exhibit H – Project Schedule
9. Exhibit I – Plans & Specifications
10. Exhibit J – Additional Insurance Requirements
11. Exhibit K – Stored Materials
12. Exhibit L – Any written amendment(s) to Agreement signed by both parties

EXHIBIT A – E

These are included in every Standard Subcontract. They are also included in the Trade Partner’s Master Service Agreement.

Exhibit E has some data populate with fields in Procore.

1. Admin Tool -> Project Information -> Name
2. Admin Tool -> Project Location -> Address, City, State, Zip
3. Admin Tool -> Project Information -> Project Number
4. Subcontract Schedule of Values -> Budget Code (cost code number and description)
5. Commitment Tool -> General Information -> Contract Company Name
6. Commitment Tool -> General Information -> Contract Company Address

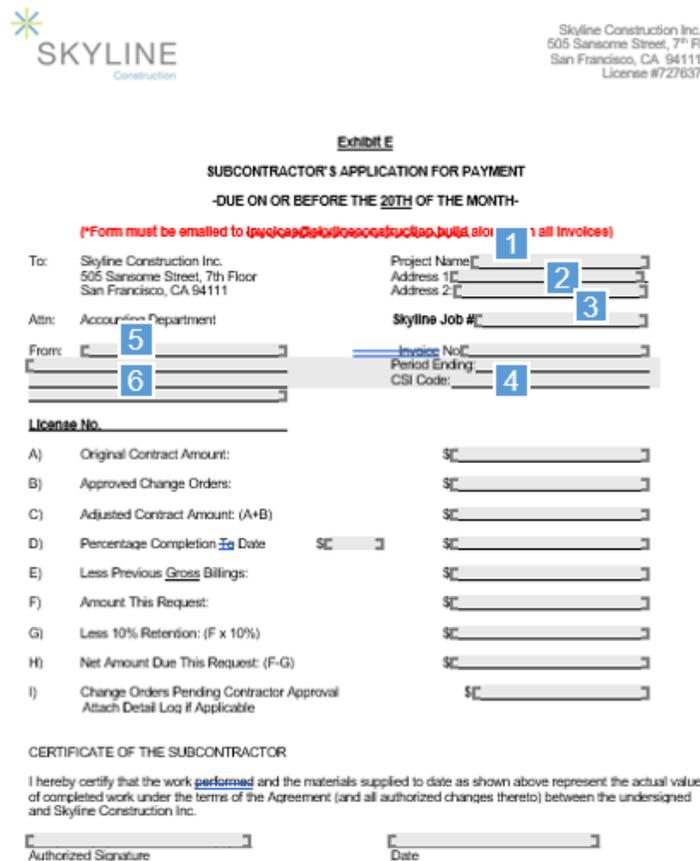


Exhibit E
SUBCONTRACTOR'S APPLICATION FOR PAYMENT
-DUE ON OR BEFORE THE 20TH OF THE MONTH-

(*Form must be emailed to pay@skylineconstruction.com build eto) 1 all Invoices)

To: Skyline Construction Inc.
505 Sansome Street, 7th Floor
San Francisco, CA 94111

Project Name: [1]
Address 1: [2]
Address 2: [2]
Skyline Job #: [3]

Attn: Accounts Department

From: [5]
[6]

Invoice No.: [4]
Period Ending: [4]
CSI Code: [4]

License No. _____

A) Original Contract Amount:		\$ [_____]
B) Approved Change Orders:		\$ [_____]
C) Adjusted Contract Amount: (A+B)		\$ [_____]
D) Percentage Completion to Date	\$ [_____] []	\$ [_____]
E) Less Previous Gross Billings:		\$ [_____]
F) Amount This Request:		\$ [_____]
G) Less 10% Retention: (F x 10%)		\$ [_____]
H) Net Amount Due This Request: (F-G)		\$ [_____]
I) Change Orders Pending Contractor Approval Attach Detail Log if Applicable		\$ [_____]

CERTIFICATE OF THE SUBCONTRACTOR

I hereby certify that the work performed and the materials supplied to date as shown above represent the actual value of completed work under the terms of the Agreement (and all authorized changes thereto) between the undersigned and Skyline Construction Inc.

Authorized Signature

Date

EXHIBITS F, G, AND H

These are Rich Text Fields that map to the corresponding blank exhibit text boxes in Procore. You can also opt to create these exhibits in Word using the appropriate template, PDF them, and include them in the attachments to be part of your final DocuSign envelope. If you opt to create and PDF the exhibits rather than use the rich text fields to automatically create your exhibit, you must type into Procore, “See Attached Exhibit”.

B. Exhibits

This Standard Subcontract includes the following exhibits that are collectively referred to as the “Exhibits” and incorporated herein.

- Exhibit A – Conditional Waiver and Release on Progress Payment
- Exhibit B – Unconditional Waiver and Release on Progress Payment
- Exhibit C – Conditional Waiver and Release on Final Payment
- Exhibit D – Unconditional Waiver and Release on Final Payment
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- Exhibit F – Subcontractor’s Scope of Work
- Exhibit G – General Project Requirements
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- Exhibit I – Plans & Specifications
- Exhibit J – Additional Insurance Requirements
- Exhibit K – Stored Materials
- Exhibit L – Any written amendment(s) to Agreement signed by both parties

COMMITMENT EXHIBITS

Exhibit F - Scope of Work:

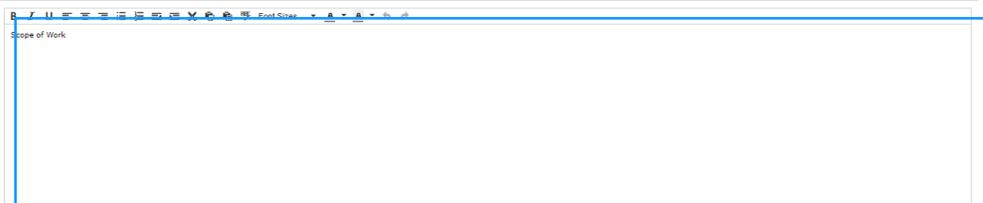
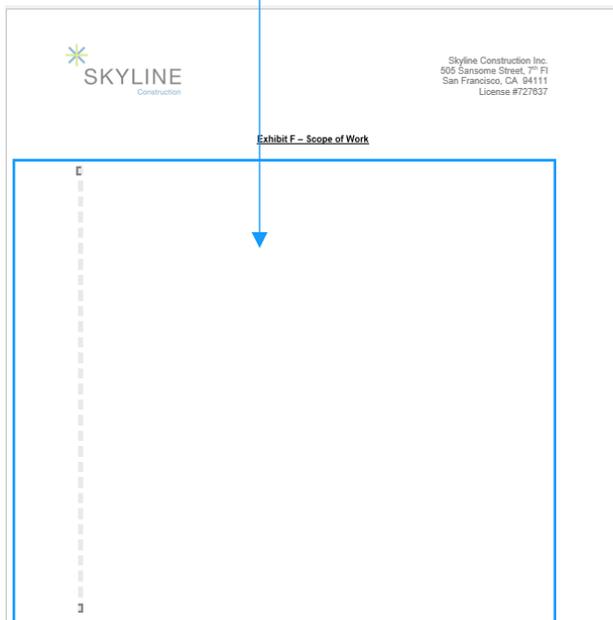


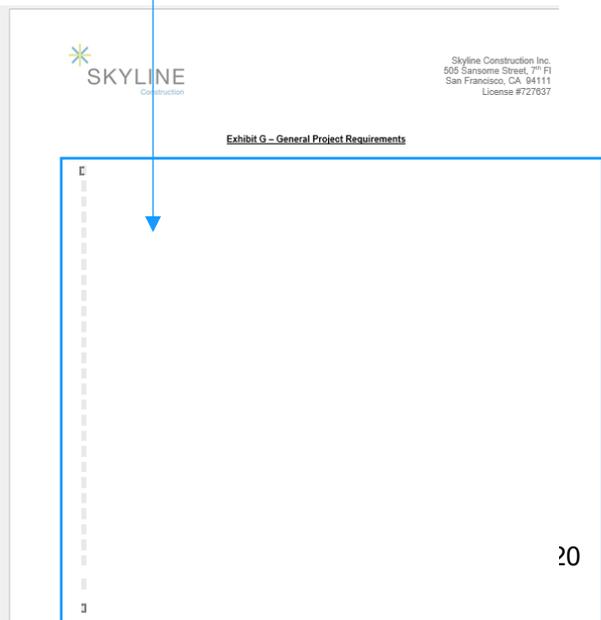
Exhibit G - General Project Requirements:

SKYLINE Construction

Skyline Construction Inc.
505 Sansome Street, 7th Fl
San Francisco, CA 94111
License #121637

Exhibit F - Scope of Work



SKYLINE Construction

Skyline Construction Inc.
505 Sansome Street, 7th Fl
San Francisco, CA 94111
License #121637

Exhibit G - General Project Requirements

PROJECT ADMIN TOOL:

COMMITMENT DETAILS

Internal Project Manager Natacha Gonzales (Skyline Enterprises) X -	Prime Contractor (If Other Than The Contractor) N/A
Construction Lender Name N/A	Construction Lender Address N/A
Building Owner Legal Entity Jimmy M Worldwide LCC	Building Owner Address 123 Parkway Blvd, Chicago, IL 60607

Exhibit J - Additional Insurance Requirements

B I U  12pt  ↶ ↷

copy and paste full project and Skyline insurance requirements here.



Skyline Construction Inc.
505 Sansome Street, 7th Fl
San Francisco, CA 94111
License #727637

Exhibit J – Additional Insurance Requirements

EXHIBIT H AND I

These are to be included by PDF'ing the master project schedule and Procore drawing log. You MUST put the corresponding exhibit and add a date if your document is not dated.



Exhibit H – Plans and Specifications

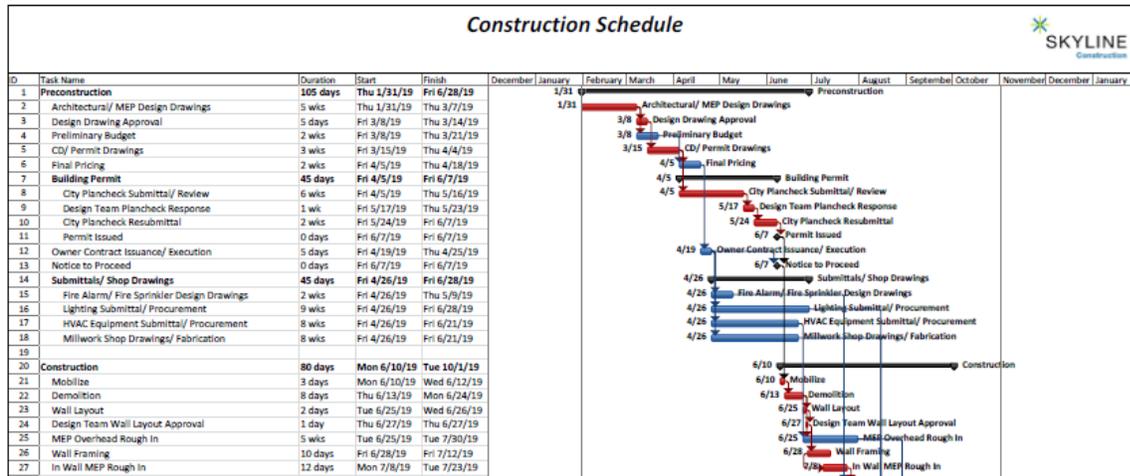
Printed on Wed May 4, 2022 at 01:34 pm PDT

Job #: TEST-XXXX Skyline Training Project
505 Sansome St 7th Floor
San Francisco, California 94111
415-908-1020

Floor 6 - Current Drawings

Drawing No.	Drawing Title	Revision	Drawing Date	Received Date	Set
Architectural					
06-A0.1	PROJECT INFORMATION	0	06/22/2018		Issue for Bid (06/22/18)
06-A0.2a	GENERAL NOTES (SF LOCAL GREEN)	0	06/22/2018		Issue for Bid (06/22/18)
06-A0.2b	SF GREEN CHECKLIST	0	06/22/2018		Issue for Bid (06/22/18)
06-A0.3	SYMBOLS AND ABBREVIATIONS	0	06/22/2018		Issue for Bid (06/22/18)
06-A0.4	EXITING AND OCCUPANCY ANALYSIS	0	06/22/2018		Issue for Bid (06/22/18)
06-A0.5	DOOR INFORMATION	0	06/22/2018		Issue for Bid (06/22/18)
06-A1.0	DEMOLITION PLAN	0	06/22/2018		Issue for Bid (06/22/18)
06-A1.1	CONSTRUCTION PLAN	0	06/22/2018		Issue for Bid (06/22/18)
06-A1.2	DIMENSION PLAN	0	06/22/2018		Issue for Bid (06/22/18)
06-A2.1	REFLECTED CEILING PLAN	0	06/22/2018		Issue for Bid (06/22/18)
06-A2.2	REFLECTED CEILING DIMENSION PLAN	0	06/22/2018		Issue for Bid (06/22/18)
06-A3.1	POWER / SIGNAL PLAN	0	06/22/2018		Issue for Bid (06/22/18)
06-A4.1	FINISH WALL PLAN	0	06/22/2018		Issue for Bid (06/22/18)
06-A4.2	FINISH FLOOR PLAN	0	06/22/2018		Issue for Bid (06/22/18)
06-A5.1	FLOOR	0	06/22/2018		Issue for Bid (06/22/18)

Exhibit I – Project Schedule dated 05.04.22



To add these exhibits to your full subcontract package, drag and drop them into the Attachments section of your Commitment Tool.



When you send to DocuSign, these attachments will automatically be included into your full subcontract package.

EXHIBIT K – STORED MATERIALS

If you wish to add this an exhibit for this, please create one and attach it to the Commitment.

EXHIBIT L – ANY WRITTEN AMENDMENT(S) TO AGREEMENT SIGNED BY BOTH PARTIES

If a subcontractor does not approve the total terms and conditions of the **Standard Subcontract** and would like to redline it, please contact the Legal Department to request a Contract Rider. Our Legal Department will create this Exhibit for you which will list the approved additions and/or deletions to the Subcontract language. You will make sure it is titled “Exhibit L – Any written amendment(s) to Agreement signed by both parties” and dated. Attach the PDF to the Attachment section, make sure the corresponding exhibit field in your Commitments Tool for this Subcontract is marked “Yes”, and click “Complete with DocuSign” so it will be included in your final DocuSign package.

EXHIBITS H-L (EXCLUDING J) HAVE A CHECKBOX FEATURE.

- A “Yes” selection does not map.
- A “No” selection will overwrite the exhibit name with “Not Applicable”.

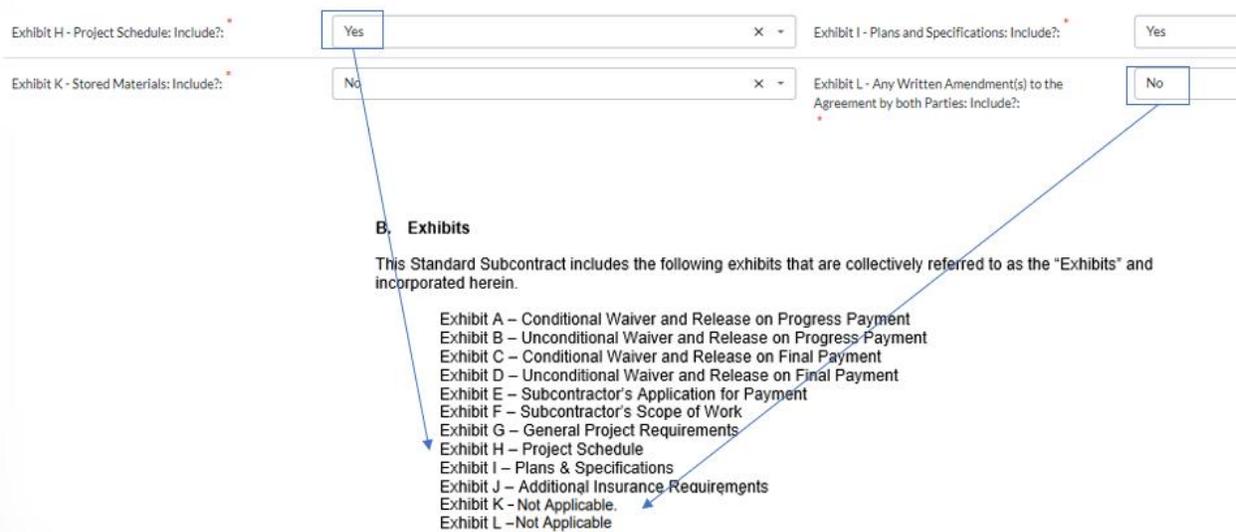


Exhibit H - Project Schedule: Include?: Yes

Exhibit I - Plans and Specifications: Include?: Yes

Exhibit K - Stored Materials: Include?: No

Exhibit L - Any Written Amendment(s) to the Agreement by both Parties: Include?: No

B. Exhibits

This Standard Subcontract includes the following exhibits that are collectively referred to as the “Exhibits” and incorporated herein.

- Exhibit A – Conditional Waiver and Release on Progress Payment
- Exhibit B – Unconditional Waiver and Release on Progress Payment
- Exhibit C – Conditional Waiver and Release on Final Payment
- Exhibit D – Unconditional Waiver and Release on Final Payment
- Exhibit E – Subcontractor’s Application for Payment
- Exhibit F – Subcontractor’s Scope of Work
- Exhibit G – General Project Requirements
- Exhibit H – Project Schedule
- Exhibit I – Plans & Specifications
- Exhibit J – Additional Insurance Requirements
- Exhibit K – Not Applicable.
- Exhibit L – Not Applicable

5. When all the Commitment Exhibits are addressed in the Subcontract and all required attachments are included in the Attachments section, click Complete with DocuSign.

NOTE: Please consult the DocuSign User Guide for a how to process documents through DocuSign.

CHANGE EVENTS

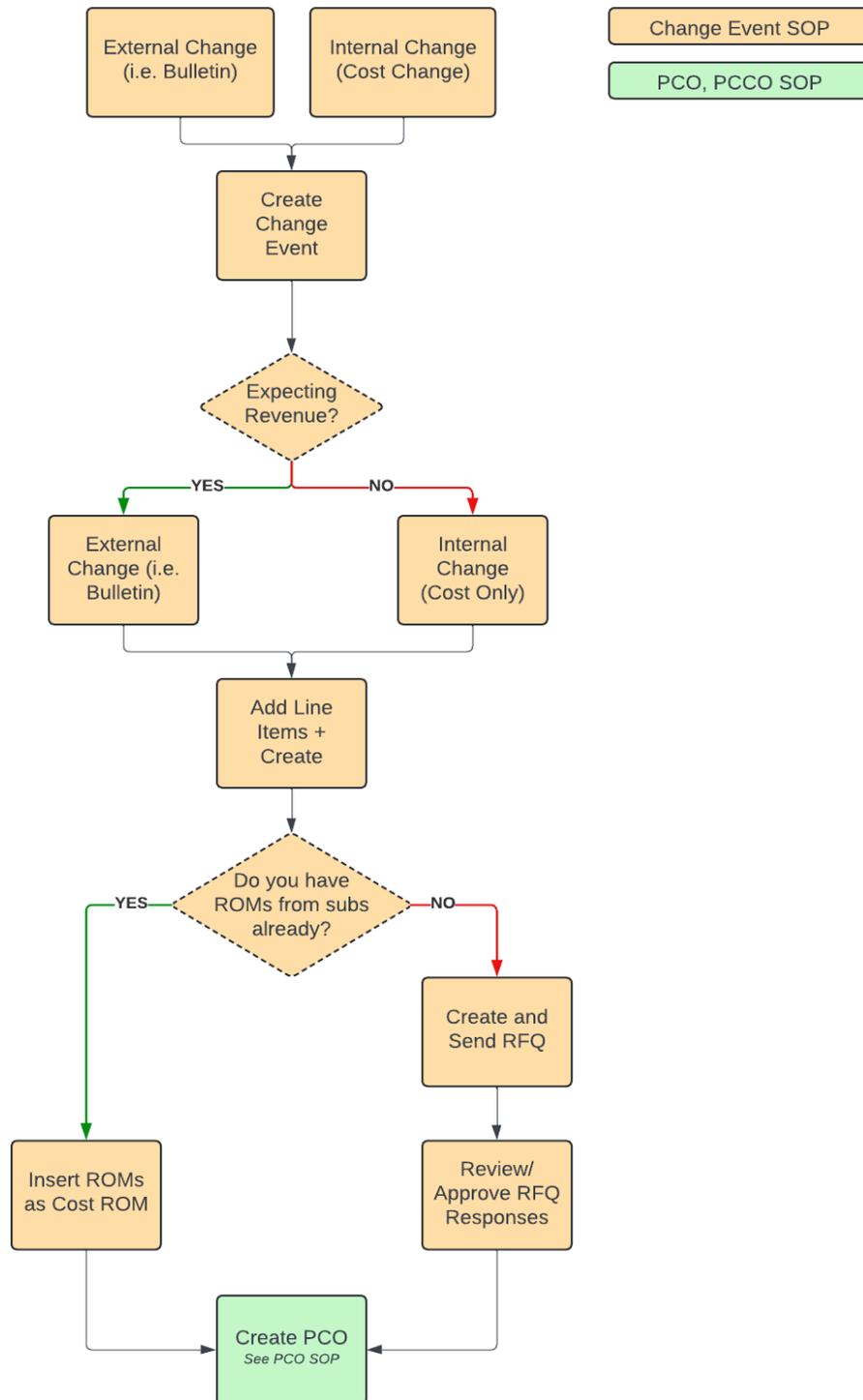
1.12 CHANGE EVENTS OVERVIEW

Change Events track potential scope impacts and allow you to capture Change Events from the field, create a Change Event directly from an RFI (or link it to an existing one), calculate rough order of magnitude (ROM) potential change orders, and manage additional costs that increase the scope of a project.

Procure Acronyms:

- Change Event: CE
- Potential Change Order: PCO
- Commitment Change Order: CCO - Finalized change orders for downstream vendor contract.
- Prime Contract Change Order: PCCO - Finalized change orders for upstream client contract.

1.13 CHANGE EVENT WORKFLOW



1.14 CREATE A CHANGE EVENT

Fill in the following fields:

Change Events > New Change Event

Create New Change Event

General Information

Number: Title: Status: Origin:

Type: Change Reason: Scope:

Expecting Revenue: Yes No Line Item Revenue Source: Prime Contract for Markup Estimates:

Number	Automatic numbering format based on sequence.
Title	Use this section to summarize the change.
Status	<ul style="list-style-type: none"> • Open • Pending • Pending – Proceeding • Pending – Not Proceeding • Not Approved • Closed • Void
Origin	<p>Link the Change Event to the Procore tool and item from which your Change Event originates.</p> <ul style="list-style-type: none"> • Correspondence • RFI • Email • Observation • Meeting • T&M
Change Type	<p>Internal label:</p> <ul style="list-style-type: none"> • Allowance • Contingency • Owner Change • Scope Gap • TBD • Internal Transfer
Change Reason	<p>External label:</p> <ul style="list-style-type: none"> • Allowance

	<ul style="list-style-type: none"> • Backcharge • Client Request • Design Development • Existing Condition • Permit Requirement • Subcontractor/Vendor Request
Scope	<p>Used in reporting:</p> <ul style="list-style-type: none"> • In Scope • Out of Scope • TBD
Expecting Revenue	<p>NO will set 'Line Item Revenue Source' to 'All Revenue ROMs will be set to 0'</p> <p>YES will provide the following 'Line Item Revenue Source' options...</p> <p>Click YES if planning on creating a PCCO or if you need to change the owner billing.</p>
Line Item Revenue Source	<ul style="list-style-type: none"> • Match Revenue to Latest Cost • Enter Manually • Quantity x Unit Cost
Prime Contract for Markup Estimates	The markup settings within this Contract will apply to the Revenue ROM.
Description	Fill in the description of the Change Event. This is where the details of the change can be populated for your own use.
Attachments	For any subcontractor backup, drag and drop the backup you have into the CE Attachments section. All attachments uploaded to the CE will carry forward through the Change Management lifecycle. That means to the PCO but also to every CCO unless you modify them at the CCO level.

Line Items

Detail					Revenue			Cost	
Budget Code	Description	Vendor	Contract	Unit of Mea	Quantity	Unit Cost	Revenue ROM	Quantity	Unit
 <p>No line items for Change Event</p> <p style="text-align: center;">Add Line</p>									
							\$0.00		

Add Line
Add Lines For All Commitments
Import Line Items from CSV

Cancel
[Create](#)

* required fields

NOTE: If you are creating a Change Event for a bulletin, ASI or any change that may impact most or every trade, select “Add Lines for All Commitments”. This will add line items in bulk using line items from all of the project’s commitments in the 'Approved' status. This along with the RFQ function can be used to collect confirmation of no costs.

1.15 ADD CHANGE EVENT LINE ITEMS

You can add line items impacted by this Change Event by either clicking add line, add line for all commitments, or import line items from CSV.

Budget Code	Select the appropriate cost code from the list or add a budget code if needed.
Description	Can be entered for each Change Event line item.
Vendor	Select the vendor’s company name impacted by this Change Event from the drop-down menu.
Contract	Selected based on the commitment that is tied to the vendor selected
Cost ROM	Are you planning on writing a subcontract or commitment change order? This is the cost amount associated with each Change Event. Cost ROMs are not required at the time of creation. *See the next section for an explanation of how to collaborate with subcontractors/vendors on pricing.
Revenue ROM	Are you planning on writing an Owner Change Order or internal PCO/PCCO? The Revenue ROM can be set up to either match the Latest Cost or manually enter the cost of the change that will be carried on the PCO and PCCO. This is the value to which the prime contract markups will be applied.
Budget ROM	Since a PCO/PCCO updates the budget, use this field only when a change has a cost impact only. The Budget ROM will automatically populate to indicate the impact to that item on the budget. This can be balanced with a budget change. This way, both the update to the committed costs and the revision to the budget line item are made to the budget.

Scenario 1: Internal Change - Cost only, no Revenue expected

Expecting Revenue <input type="radio"/> Yes <input checked="" type="radio"/> No	Line Item Revenue Source All Revenue ROMs will be set to 0
---	--

Line Items					Revenue	Cost	Budget
Detail					Revenue	Cost	Budget
Budget Code ↑	Description	Vendor	Contract		Revenue ROM	Cost ROM	Budget ROM
04-400.S Stone.Commitment	Stone Change	Superior Subcontractor	#SC--009: Stone Scope		\$0.00	\$500.00	\$0.00

Scenario 2: External Change - Revenue expected, Revenue matches Cost

Expecting Revenue Yes No

Line Item Revenue Source: Match Revenue to Latest Cost

Line Items

Detail				Revenue	Cost	Budget
Budget Code ↑	Description	Vendor	Contract	Revenue ROM	Cost ROM	Budget ROM
04-400.S Stone.Commitment	Stone Change	Superior Subcontractor	#SC--009: Stone Scope	⚡ \$500.00	\$500.00	⚡ \$500.00

Scenario 3: External Change - Revenue expected, Revenue does not match Cost

Expecting Revenue Yes No

Line Item Revenue Source: Enter manually

Line Items

Detail				Revenue	Cost	Budget
Budget Code ↑	Description	Vendor	Contract	Revenue ROM	Cost ROM	Budget ROM
04-400.S Stone.Commitment	Stone Change	Superior Subcontractor	#SC--009: Stone Scope	⚠ \$600.00	\$500.00	⚡ \$600.00

1.16 RFQS

OPTION 1: Send Request for Quote (RFQ) to collaborator(s).

- Go to the Change Event line item(s) and mark the checkbox the specific vendor(s) related line items that you want to send the RFQ to.
- Once checked, click the “Send Requests for Quote” button at the top of the line items table.
- Once the RFQ module opens up, validate or change the information in the request as needed.
- Confirm the recipient named in the drop-down list.
 - Note: you can only pick one recipient per vendor. Only individuals that have been added to the Privacy section of the relevant commitment (under “Access for non-admin users”) will be available to send RFQs to.
- Update/fill in distribution recipients for each RFQ.
- Attach any relevant files for request.
- Click “Create RFQs” to send the request. (Note: Status of RFQ will update to Out for Pricing within Change Event.)

Line Items

Search

Add to

Detail	
Item Type ↓	Budget Code
<input checked="" type="checkbox"/>	06-400.S Architectural Wo

Change Events > Send RFQs

Send RFQs

GENERAL INFORMATION

Title:

Due Date: 

Request Details:


Distribution:

Attachments:  

COMMITMENT SELECT

Change Event Line Item	RFQ Scope Description	Contract Company	Contract #	Recipients	
CE #59	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

OPTION 2: Enter an RFQ on behalf of your subcontractor OR bypass the RFQ process by entering a Cost ROM and carrying that as the Latest Cost.

Cost	
⋮	Cost ROM
⋮	Request for Quote
	\$500.00
	Out for Pricing

Commitments > Contract #SC-009 > RFQs > RFQ #002 Export ▾

 An RFQ for Change Event #59 was sent to this Commitment on 05/21/24 at 08:26 am. Resend Request **Respond**

Request for Quote #002

General Related Items (0) Emails (0) Change History (2)

Commitments > Contract #SC-009 > RFQs > RFQ #002 Export ▾

 G. Jones Construction has requested a quote from you sent on 05/21/24. Please provide your quote below. Your quote is due by 05/28/24 (in 6 days)

Do you have a cost or schedule impact associated with this scope?

Scope Description: Stone Change

Yes
 No

Cancel

Commitments > Contract #SC--009 > RFQs > RFQ #002: RFQ Title Export ▾

 G. Jones Construction has requested a quote from you sent on 05/21/24. Please provide your quote below. Your quote is due by 05/28/24 (in 6 days)

<p>Do you have a cost or schedule impact associated with this scope?</p> <p>Scope Description: Stone Change</p> <p><input type="radio"/> Yes <input type="radio"/> No</p>	<p>Quote Amount: * \$ <input type="text" value="750"/></p> <p>Schedule Impact: <input type="text" value="1"/> days</p> <p>Comments: <input type="text" value="See attached pricing backup."/></p> <p>Attachments/Details</p> <p>Attach File(s) Drag and Drop File(s)</p> <p>Pricing Backup.docx ✕</p>
---	---

[Cancel](#) [Post Response](#)

1.17 REVIEW RFQ RESPONSES

- If approved internally, update the status to Pending Final Approval or Closed.
 Putting an RFQ in one of the Complete statuses is required for the “Latest Cost” to be updated with the approved pricing. For Out of Scope Change Orders, this will also update the “Latest Price” (used on PCO/PCCO)
- If not approved internally, update status to Revise and Resubmit.
- If pricing is no longer needed, update status to Withdrawn.

Commitments > Contract #SC--009 > RFQs > RFQ #002: RFQ Title Export ▾

 Jones, Grace (G. Jones Construction) responded to your RFQ on 05/21/24, sent from [Change Event #59](#). [View the response below.](#)

How do you want to proceed?

[Update Status](#) [Revise & Resubmit](#)

[Update & Post Response](#)

How do you want to proceed?

RFQ Status:

- In Progress**
 - Out for Pricing
 - Revise and Resubmit
 - Under Review**
- Complete**
 - Pending Final Approval
 - Closed
- Withdrawn**
 - Withdrawn

1.18 UPDATE CHANGE EVENT STATUS

See Prime Contract Potential Change Order and Prime Contract Change Order SOP for instructions on how to create change orders.

1.19 CHANGE EVENT OVER / UNDER

IMPORTANT: The “Over/Under” column in the Change Event may not be an accurate representation of the profit being made on the Change Event.

The markups configured on the Prime Contract and calculated in the “Over/Under” column include increases in profit and costs. Below is a table generally explaining which markups are increasing profit and which markups are increasing costs:

Markup	Budget Impact
Insurance	Increase in Cost / Possible Profit
Fee	Increase in Profit
Builder’s Risk Insurance	Potential Increase in Cost / Possible Profit
GRT / Taxes	Increase in Cost

1.20 CHANGE EVENT PERMISSIONS

Change Event Permission Levels by Project Role

Permission	Read Only	Standard	Admin
ADMIN			X
APM / PM / SPM / PX			X
A SUP / SUP / AS / GS / SQP	X		
INTERN	X		
LAB / FRM / CARP	X		
PA			X
PC		X	
PE / FE			X

1.21 CHANGE EVENT FAQs

Q: Why do I have Open Change Events with a Prime Potential Change Order (PCO)?

A: If a Change Event is in an open status but has a Prime PCO, the commitment change order may not have been processed OR the Prime Contract Change Order is being reevaluated.

Q: When MUST I use a Change Event?

A: Any time you want to make a change to the contract items:

- allowance draw
- contingency draw
- internal billing line-item correction
- change order to the client
- commitment change orders (subcontract change orders).

Q: When should I create a Change Event?

A:

- Anytime a change to the original scope of work arises
- RFI response that might add additional scope
- Design document receipt

- Change request from the client
- Submittal markup from the architect

Q: Can I create a Change Event if I do not yet have pricing on the change?

A: Yes! You do not need to know the pricing to start logging the event. It's encouraged to log any event that may have cost, scope, schedule or any other project impact as soon as it arises.

Q: Does it matter if I create a Commitment Change Order (CCO) or Prime Contract Potential Change Order (PCO) first?

A: Best practice is to create and receive approval on the PCO prior to the creation of the CCO. This reduces exposure and ensures that we are able to cover the cost of the change. In cases where Revenue is not expected on a change, only a CCO will be created.

Q: Why can't my subcontractor respond to an RFQ?

A: RFQ recipients need to be added to the Privacy section of their commitment and must have standard permission to the Commitments tool.

PRIME CONTRACT CHANGE ORDERS

1.22 PRIME CONTRACT OVERVIEW

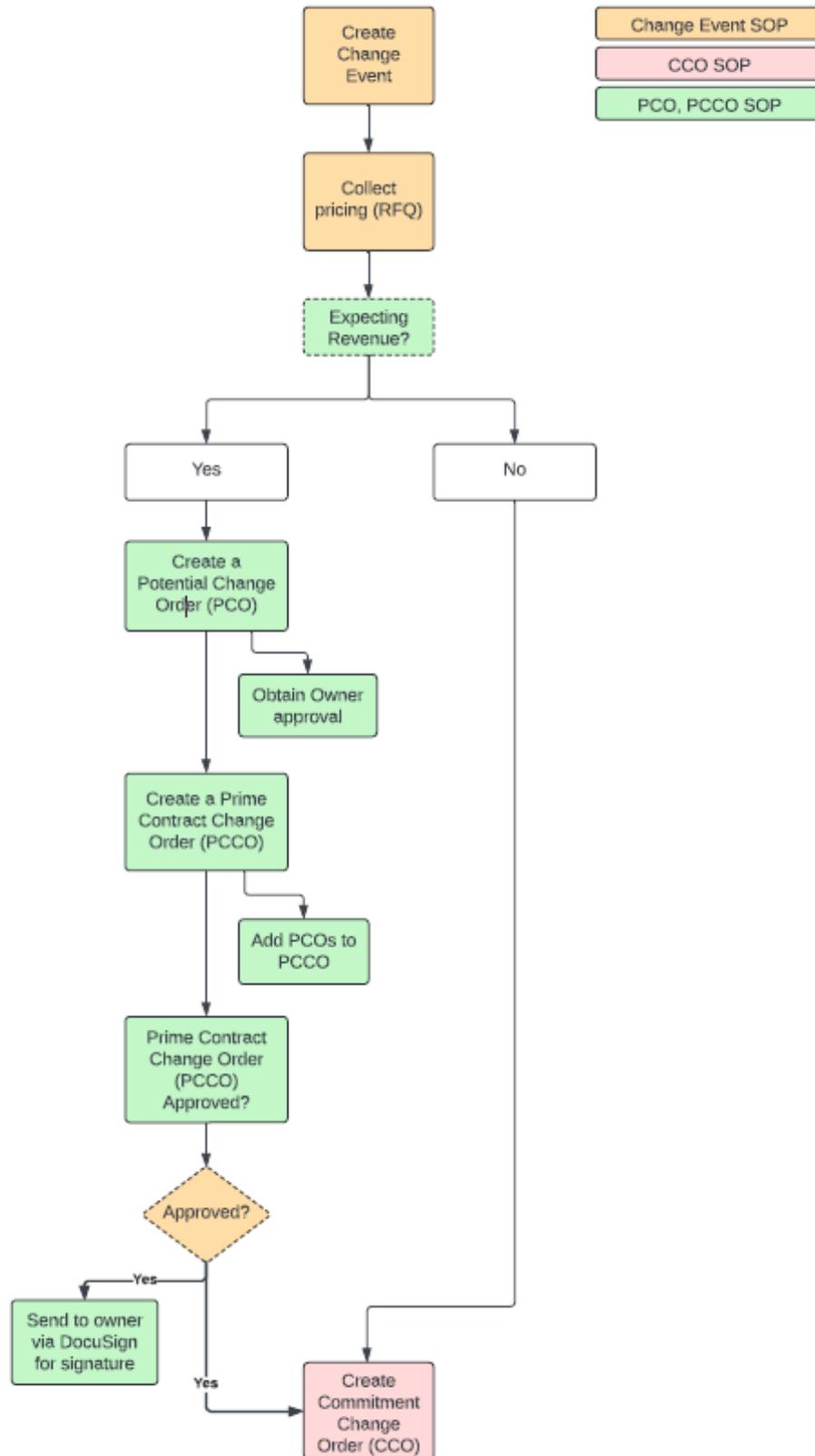
Once you have completed the Change Event, you can create a Potential Change Order to the Owner (PCO) from the Change Event for all line items where Revenue (\$\$ in from the Owner) is expected.

The PCO will then be added to a Prime Contract Change Order (PCCO) for the owner's final approval.

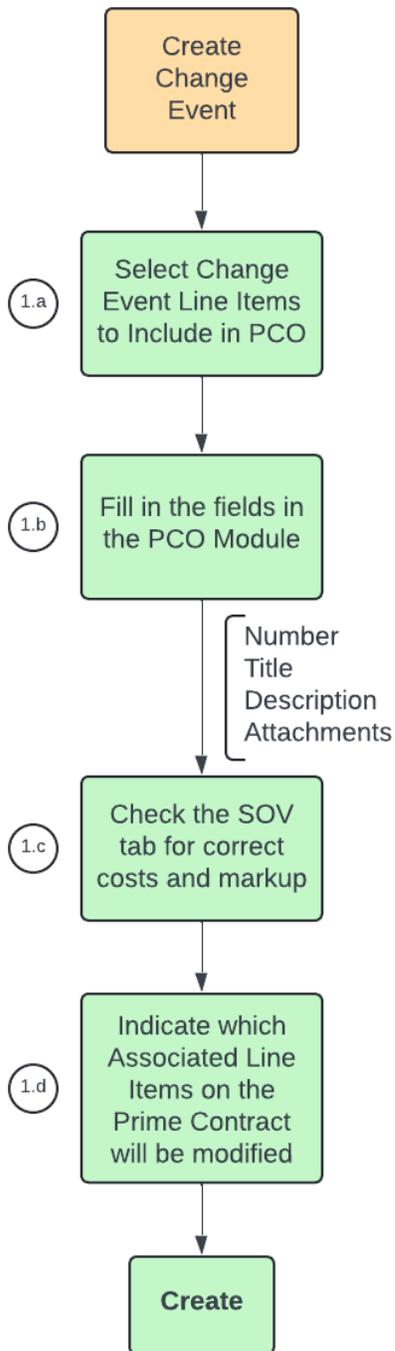
Once approved, the PCCO can be sent to Sage for review by Accounting.

Best practice is generally to create and receive approval on the PCO prior to creating any associated cost changes (CCOs). This reduces exposure and ensures that we are able to cover the cost of the change. In cases where revenue is not expected based on a change, only a CCO will be created.

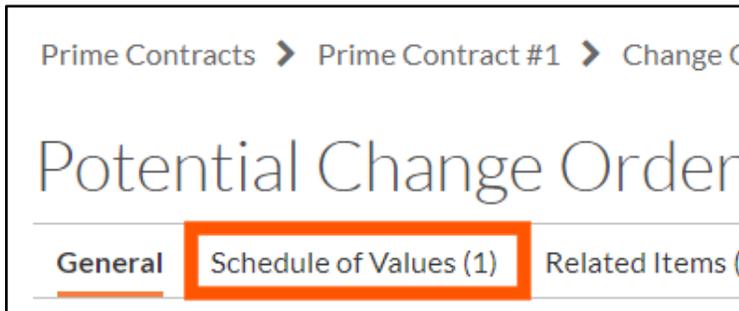
1.23 CHANGE EVENT / PCO / CCO WORKFLOW



1.24 CREATE PRIME CONTRACT POTENTIAL CHANGE ORDER (PCO)



- Review the Schedule of Values to confirm the costs and markups are listed and calculated correctly.



- Under the list of Associated Line Item is where we tie the line item to the appropriate G703 SOV line item for Owner Contract billing purposes. If it is not a new line item, then look for the matching cost code number/description.

Change Event Line Items:	Event	Cost Code	Line Item Type	Description	Associated Line Item
1	CE #002 - Test	09-250 - Drywall	Subcontractor	GWB	Select a Line Item ▼

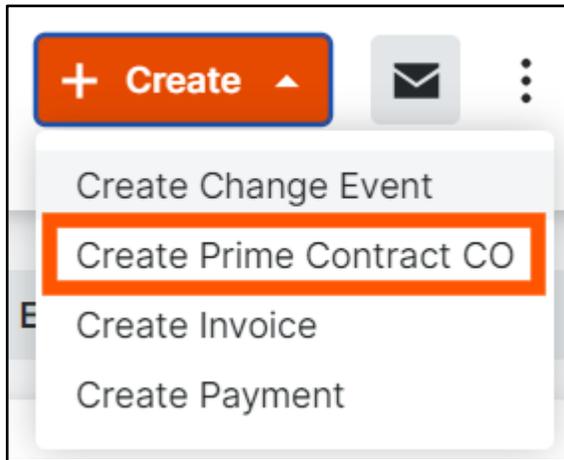
- Select a Line Item
- New Line Item
- #1 - 01-050 - General Conditions : O - General Conditions
- #2 - 01-500 - General Requirements : O - General Requirements
- #3 - None - Demolition
- #4 - None - Dumpsters / Temp Protection
- #5 - None - Rough Carpentry
- #6 - None - Millwork - Master Millwork
- #7 - None - DFH - Recor
- #8 - None - DFH - Skyline
- #9 - None - Glazing - Eastside Glass
- #10 - None - Drywall - Olympic
- #11 - None - Stocking & Scrapping
- #12 - None - Acoustic Ceiling - T-Bar
- #13 - None - Flooring - Division 9
- #14 - None - Floor Prep
- #15 - None - Paint - C&P
- #16 - None - Paint Touch Up
- #17 - None - Specialties
- #18 - None - Appliances - Metropolitan

Description = Keep this SUPER simple, think of this as the Billing line item description. This is not a description of the detail of work. If this is a new line item, you will be naming the billing line item you create with the description you enter here.

- Add associated backup for the client to view that should be added to the PDF unless it is attached/linked in Procore and the PCO will be sent to the client electronically. Send to the Client/Management Team via DocuSign for their signature.

1.25 CREATE PRIME CONTRACT CHANGE ORDER (PCCO)

- Navigate to the correct Prime Contract and select “Create Prime Contract CO”



- Once in the PCCO module, fill in the fields within the form.
- Include the relevant PCOs in the PCCO.
- Place the PCCO in a Pending Status

Prime Contracts > Prime Contract #1 > Change Orders > New Prime Contract Change Order

New Prime Contract Change Order

General

GENERAL INFORMATION

Sign with DocuSign:

#:

Date Created: 05/21/24 at 04:38 pm

Revision:

Created By:

Title:

Status: **Pending - In Review** ▼

Private:

Due Date: 

Invoiced Date: 

Designated Reviewer: ▼

Paid Date: 

Reviewer:

Review Date:

Description:

B *I* U          Font Sizes ▼ **A** ▼ **A** ▼  

Executed:

Signed Change Order Received Date: 

Potential Change Orders: **Select a PCO to Add...** ▼

Schedule Impact: days

Revised Substantial Completion Date: 

Attachments:

 Attach File(s)

Drag and Drop File(s)

Cancel

Create & Email

Create

Complete with DocuSign

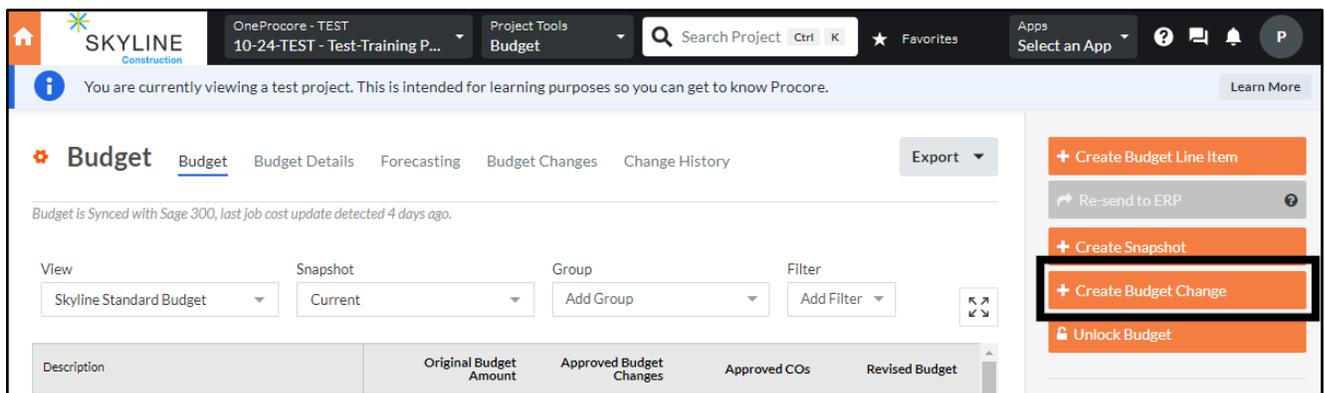
- Place the PCCO in an Approved Status once finalized.
- **Send the Approved PCCO through DocuSign to obtain the signatures.**
- Select the “Send to ERP” button to send the PCCO to accounting for approval and syncing with Sage.

1.26 BUDGET CHANGES

Budget changes can be used for internal cost changes and for line item transfers. The Budget SOP outlines the use of Budget Changes for line item transfers. This SOP will detail the use of Budget Changes as a way to modify the budget in the event there is a cost change (change to a commitment) with no associated revenue change (prime contract change order).

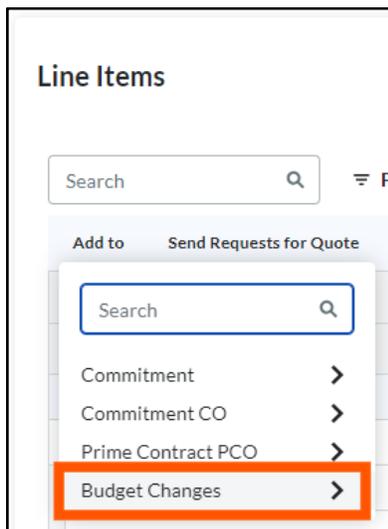
Budget changes can be initiated in the Budget tool or in the Change Events tool.

BUDGET TOOL



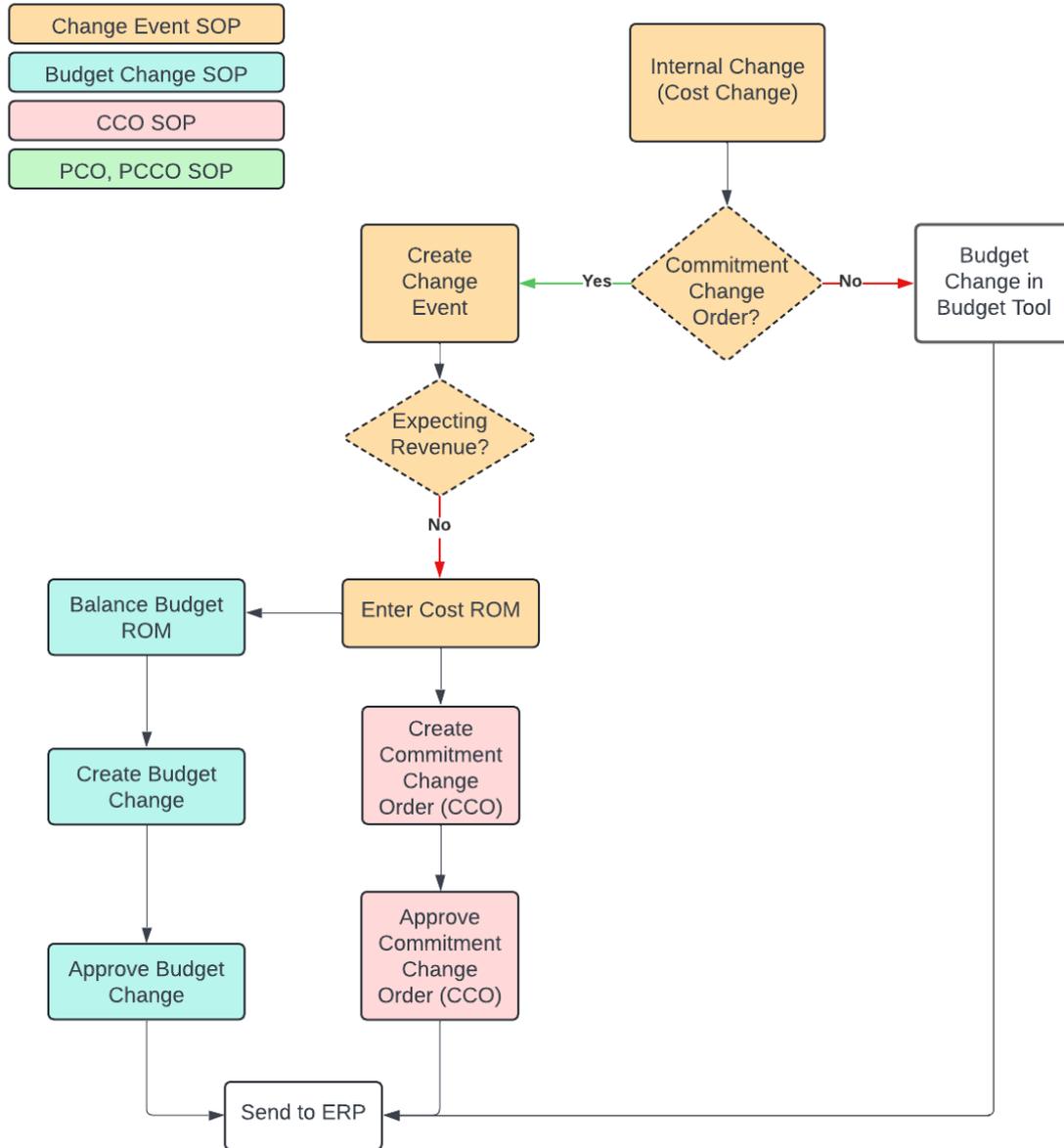
The screenshot shows the SKYLINE Construction interface for the Budget tool. The top navigation bar includes the SKYLINE logo, project name 'OneProcure - TEST 10-24-TEST - Test-Training P...', and various utility buttons like 'Search Project', 'Favorites', and 'Apps'. Below the navigation, there's a status message: 'You are currently viewing a test project. This is intended for learning purposes so you can get to know Procure.' The main content area is titled 'Budget' and has tabs for 'Budget', 'Budget Details', 'Forecasting', 'Budget Changes', and 'Change History'. A sub-header indicates 'Budget is Synced with Sage 300, last job cost update detected 4 days ago.' There are several filters and controls: 'View' (Skyline Standard Budget), 'Snapshot' (Current), 'Group' (Add Group), and 'Filter' (Add Filter). On the right side, there's a vertical toolbar with buttons: '+ Create Budget Line Item', 'Re-send to ERP', '+ Create Snapshot', '+ Create Budget Change' (highlighted with a red box), and 'Unlock Budget'. At the bottom, a table header is visible with columns: 'Description', 'Original Budget Amount', 'Approved Budget Changes', 'Approved COs', and 'Revised Budget'.

CHANGE EVENTS TOOL



The screenshot shows the SKYLINE Change Events tool interface. The title is 'Line Items'. There's a search bar at the top. Below it, there are two tabs: 'Add to' and 'Send Requests for Quote'. A dropdown menu is open under the 'Add to' tab, showing a search bar and a list of options: 'Commitment', 'Commitment CO', 'Prime Contract PCO', and 'Budget Changes' (highlighted with a red box). Each option has a right-pointing arrow next to it.

1.27 BUDGET CHANGES WORKFLOW

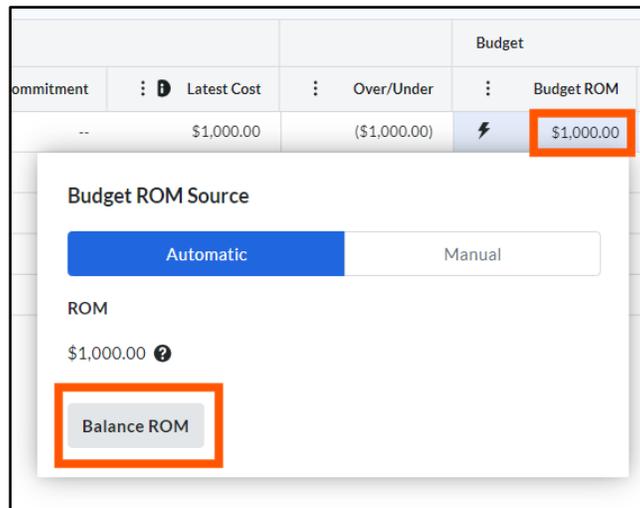


1.28 HOW TO CREATE A BUDGET CHANGE

- Balance the Budget
 - a. When a cost only change event is created (not expecting revenue), the Budget ROM column in the Change Event will be populated.

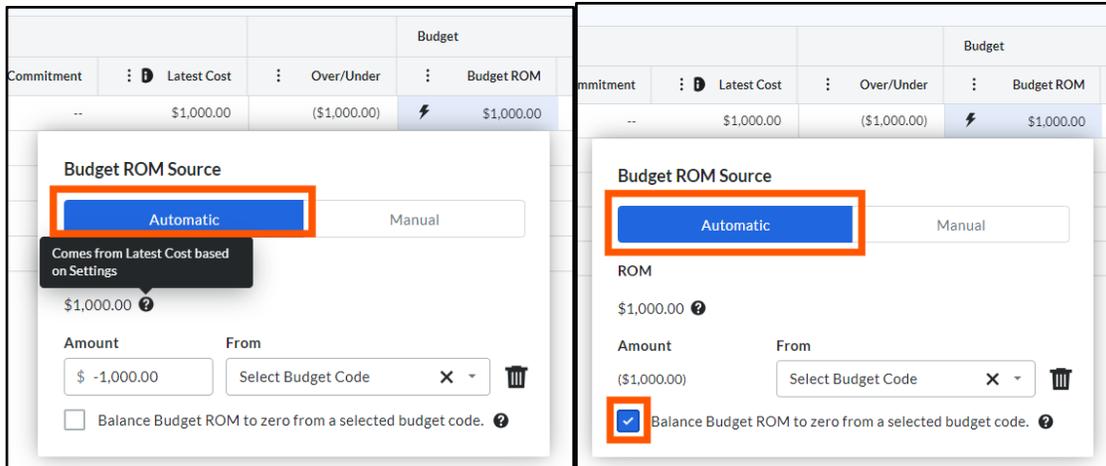
Cost					Budget	
Cost ROM	quest for Quote	Commitment	Latest Cost	Over/Under	Budget ROM	
\$1,000.00	--	--	\$1,000.00	(\$1,000.00)	\$1,000.00	
				\$0.00		
				\$0.00		
\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	

- b. This is where you can initiate the balancing of the budget by creating a budget change.



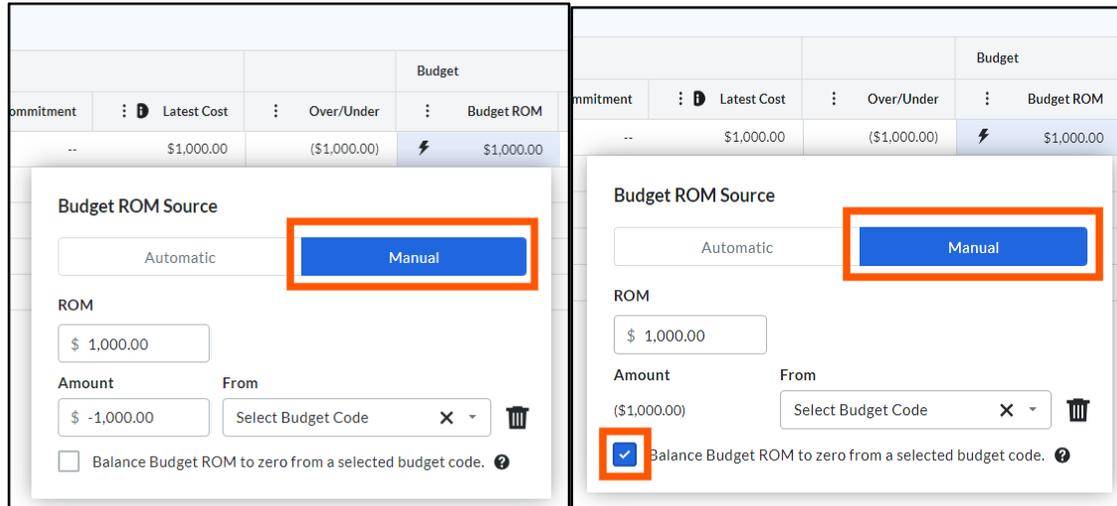
The screenshot shows a dialog box titled "Budget ROM Source". It has two radio buttons: "Automatic" (selected) and "Manual". Below the radio buttons, the "ROM" field is set to "\$1,000.00". At the bottom of the dialog, there is a button labeled "Balance ROM" which is highlighted with an orange box. In the background, a table snippet shows the "Budget ROM" column with a value of "\$1,000.00" also highlighted with an orange box.

- c. Automatic
 - i. This option will auto populate the ROM to match the Latest Cost from the Cost ROM. You can also select the "Balance Budget ROM to zero from a selected budget code" option to auto populate the value that is being deducted from the specified budget code.



d. Manual

- i. This option lets you update the value of the Budget ROM.



- e. Select the Budget ROM value to then select which budget line item you want to shift budget from to cover that ROM.

NOTE: Budget changes will need to be synced with Sage.

Once you have created and approved the budget change, select the "Re Send to ERP" button on the budget page and notify accounting that the budget changes need to be pushed to Sage.

1.29 BUDGET CHANGES FAQs

Q: Why do I have to create a change event if there is only a cost change? Why, can't I just create a Budget Change?

A: You can create a Budget Change to move money around your Budget however, in the event you need to create a CCO, then you must start with creating a Change Event. Updating your Budget within the Change Events tool will associate that Budget Change or updated anticipated cost with the CCO.

1. Gather Costs - add to Cost ROM.
2. Create a Commitment Change Order (CCO) to reassign costs to the correct contracts.
3. Create a Budget Change to reassign budget to the correct line items in the budget.

COMMITMENT CHANGE ORDERS

1.30 COMMITMENT CHANGE ORDER OVERVIEW

Once you have completed the change event, created a Potential Change Order (PCO) and Prime Contract Change Order (PCCO), you can then create a Commitment Change Order (CCO) to document cost changes.

Best practice is to create and receive approval on the PCO prior to the creation of any associated cost changes (CCOs). This reduces exposure and ensures that we are able to cover the cost of the change. In cases where Revenue is not expected on a change, only a CCO will be created.

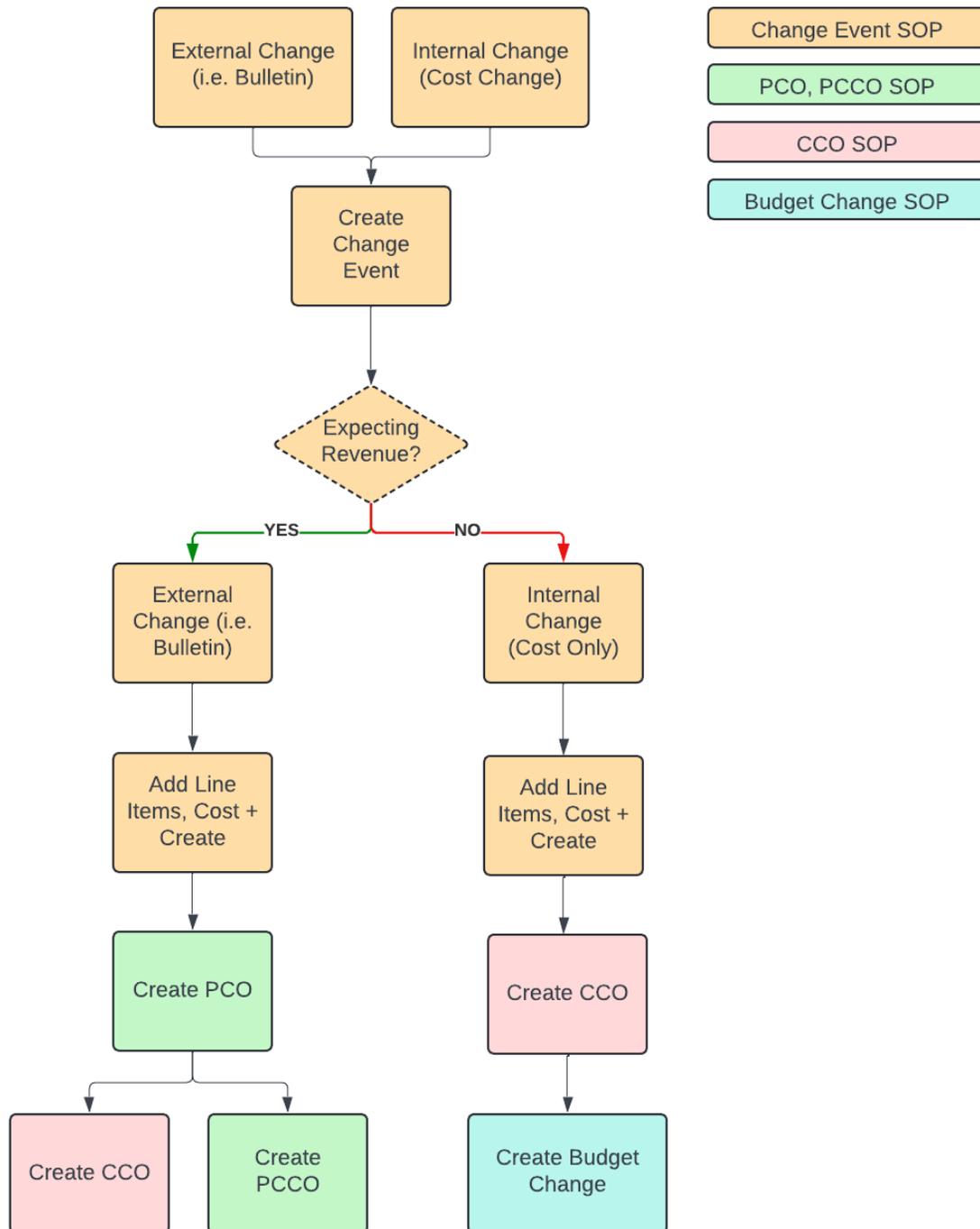
Once approved and fully executed through DocuSign, the CCO can be pushed to ERP for review by Accounting and synced to Sage.

TOOL LOCATION: Project Level Project Financial Management Tool - Change Events, Change Orders, Commitments

CCOs will originate in the Change Events tool. Once a CCO has been created, you can access it through the Change Events, Change Orders, and Commitments tool under the Change Orders tab on the relevant Commitment.

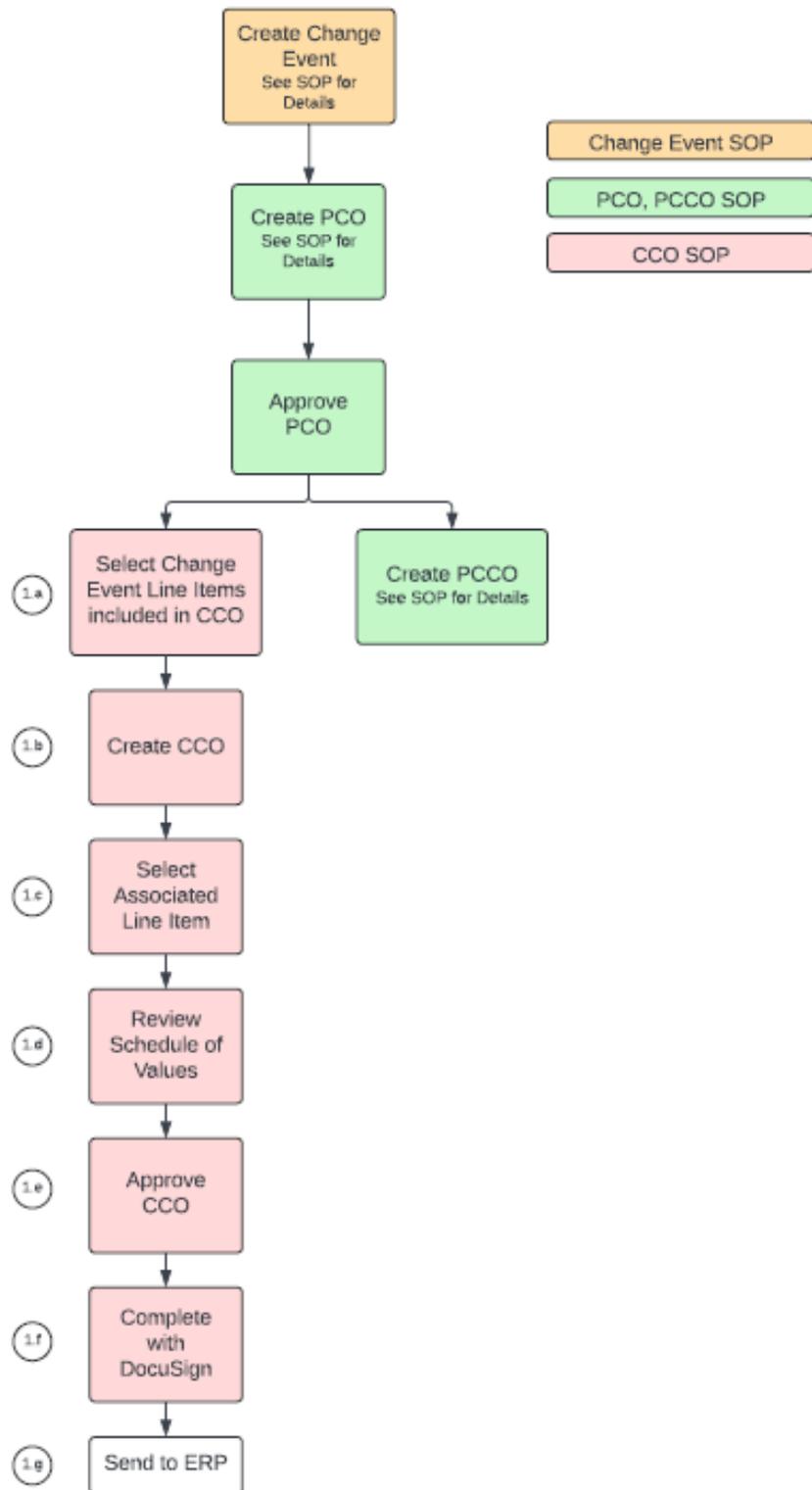
Confirm Cost Change: Pricing will need to be collected from subcontractors as part of the Change Event creation and as a prerequisite to creating the PCO and the CCO. This can be done through the RFQ process (see the Change Event SOP) or via email and entered into the change event on behalf of the sub.

1.31 COMMITMENT TOOL WORKFLOW



1.32 CCO SCENARIOS

SCENARIO 1: CREATE A CCO FOR A COST AND REVENUE CHANGE



- a. Select the line items in the Change Event that need to be included in the CCO

Line Items

Filters

Add to Send Requests for Quote

	Detail
<input checked="" type="checkbox"/> Item Type ↓	Budget Code
<input checked="" type="checkbox"/>	08-100.S Doors, Frames & Hardware.Subcor

- b. Add selected line items to Commitment CO

Add to Send Requests for Quote

- Commitment >
- Commitment CO >
- Prime Contract PCO ?
- Budget Changes >

- c. Select Associated Line Item: this is the line item on the commitment that will be modified in both Procore and Sage. You should select the line item on the contract that corresponds to the scope being modified, do not select "New Line Item".

	Description	Associated Line Item
	Door upgrade	<div style="border: 1px solid gray; padding: 2px; display: inline-block;"> Select a Line Item ▼ </div>
<div style="border: 1px solid gray; background-color: #f0f0f0; padding: 5px;"> Select a Line Item New Line Item #1 - 08-100 - Doors, Frames & Hardware : S - Doors, Frames, and Hardware </div>		

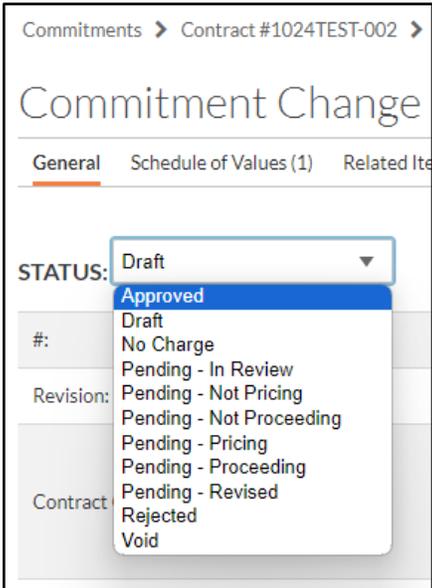
- d. Double check that the schedule of values pulled from the change event correctly.

Commitments > Contract #1024TEST-002 > Change Orders > CCO #001: CE #003 - Door Upgarde

Commitment Change Order #001: CE #003 - Door Upgarde

General
Schedule of Values (1)
Related Items (0)
Emails (0)
Financial Markup
Change History (2)
ERP Integration

- e. Approve the CCO.



Commitments > Contract #1024TEST-002 >

Commitment Change

General Schedule of Values (1) Related Items

STATUS: Draft ▼

- Approved
- Draft
- No Charge
- Pending - In Review
- Pending - Not Pricing
- Pending - Not Proceeding
- Pending - Pricing
- Pending - Proceeding
- Pending - Revised
- Rejected
- Void

#:

Revision:

Contract:

- f. Complete and send to the subcontractor with DocuSign.



Cancel Save & Email Save Complete with DocuSign

- g. Once fully executed, send the CCO to ERP. This will notify the Accounting approvers that there is a CCO that is ready for their review. Once reviewed and verified the CCO is fully executed, it will be synced with Sage and the commitment amount in Sage will be updated. The CCO must be approved and fully executed to send it to ERP.



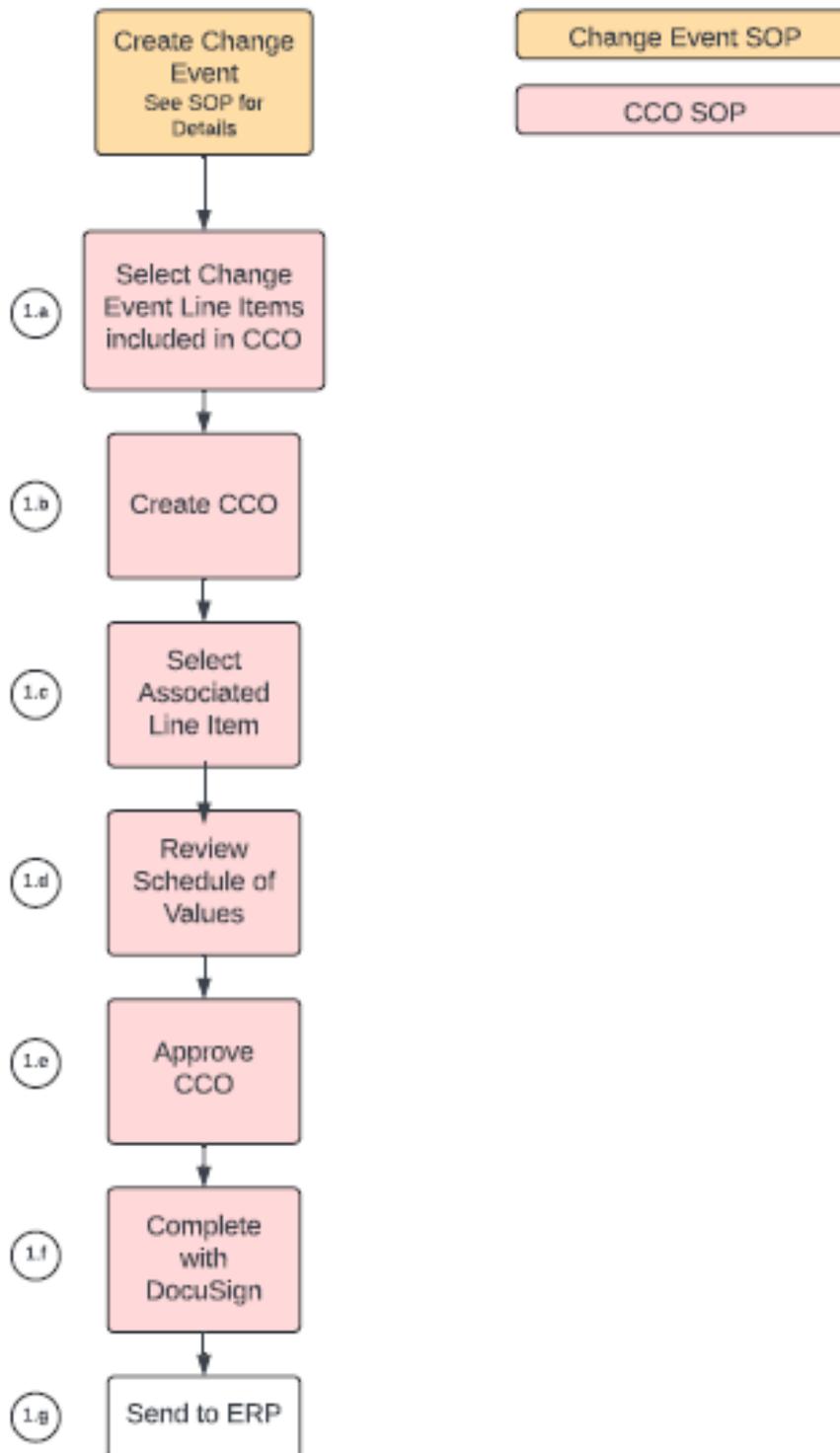
+ Create Change Event

↪ Send to ERP

✉ Email

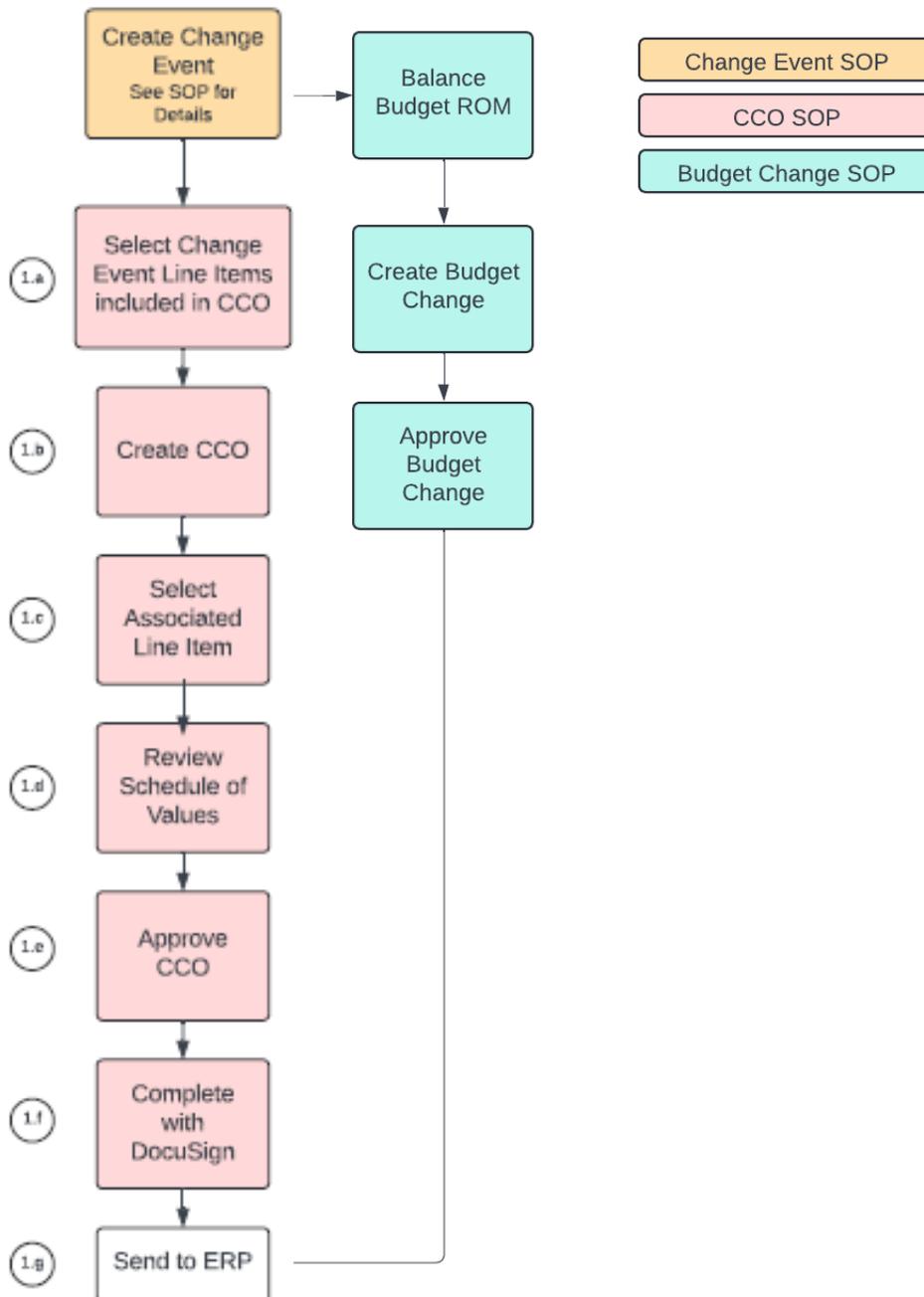
SCENARIO 2: CREATE A CCO FOR A COST ONLY CHANGE

In the event of a cost only change, follow the steps in Scenario 1 to create the CCO. In this Scenario (2) there will be no preceding PCO or PCCO. The CCO will be created from the change event once costs have been gathered.



SCENARIO 3: CREATE A CCO FOR A COST ONLY CHANGE WITH A CORRESPONDING BUDGET CHANGE

In the event of a cost only change, where the budget will also need to be updated, follow the steps in Scenario 2 to create the CCO. Refer to the Budget Change SOP for directions on how to balance the budget after a cost change has been made.



1.33 CCO PERMISSIONS

Commitment Change Orders Permission Levels by Project Role

Permission Profile	Read Only	Standard	Admin
ADMIN			X
APM / PM / SPM / PX			X
A SUP / SUP / AS / GS / SQP	NONE		
INTERN	NONE		
LAB / FRM / CARP	NONE		
PA			X
PC	X		
PE / FE			X

1.34 CCO FAQs

Q: Does it matter if I create a Commitment Change Order (CCO) or Prime Contract Potential Change Order (PCO) first?

A: Best practice is to create and receive approval on the PCO prior to the creation of the CCO. This reduces exposure and ensures that we are able to cover the cost of the change. In cases where Revenue is not expected on a change, only a CCO will be created.

BUDGET TOOL

1.35 BUDGET OVERVIEW

The budget tool will provide the project team with real-time comparison of the estimated project costs against committed costs and other job costs throughout the construction lifecycle.

The Procore Budget will be used by project teams to:

- Track commitments.
- Track expenses.

- Forecast costs and estimate the total cost at completion.
- Forecast the projected over / under.

The Original Project Budget will be created in Sage and synced with Procore, at which point project teams will be able to start managing the budget in Procore.

1.35.1 LOCK THE BUDGET

- The Project Accountant will be responsible for locking the initial budget.
 - The budget will arrive in Procore from Sage “unlocked” - it will need to be locked and remain locked. NEVER unlock your Budget.
 - Changes to the budget cannot be made nor synced with Sage unless it is locked.



1.36 BUDGET VIEWS

Various “budget views” will be available in the budget tool, providing each project team member with the data points they need to see on a regular basis.

- Budget views are intended for internal use only and should not be shared with the owner.
- These will be assigned to each project as part of project setup.
- The budget views can be grouped and filtered.
 - For example the “Committed Cost Status” Budget View will need to be filtered by Cost Type “S” (Commitments).

Budget views required by the project team will be assigned to the project at project startup.

1.36.1 SKYLINE STANDARD BUDGET

- This is your standard budget view.

1.36.2 COMMITTED COST STATUS

- Filter this budget view by S and see a snapshot of percent billed to date.

1.36.3 PROFIT PROJECTIONS WORKBOOK VIEW

- This budget view is intended to use in conjunction with the Profit Projections Workbook.

1.36.4 CURRENT MARGIN

- Margin View gives you a quick peek at your margin based on real time Procore financials work.

1.37 PROJECT STATUS SNAPSHOTS

- The Project Manager will be responsible for taking the initial Procore Budget and Forecast snapshot. This should happen once a month, by the 15th (Accounting budget sync cutoff).
 - Snapshots allow you to track changes to your budget by capturing and storing historical data.
 - These will live in the budget tool Snapshot dropdown.
- There are two types of snapshots:
 - Project Status Snapshot: These will be visible on the project and on the company level snapshot tool.
 - Note: For consistency and to allowed month over month comparison, the monthly forecast snapshot should be taken using the same Budget View each time.
 - Ad Hoc Snapshot: These will be visible only on the project level by the individual who took it.

Create Snapshot
✕

Created By
Grace Jones

Date
May 21, 2025

Snapshot Type

Project status
Record snapshots that appear in both Project and Company level views for more structured processes around forecasting, monthly reporting, and status tracking.

Ad hoc
Record a one-off snapshot ideal for capturing your budget without the need to track it across your portfolio.

Name *

View *

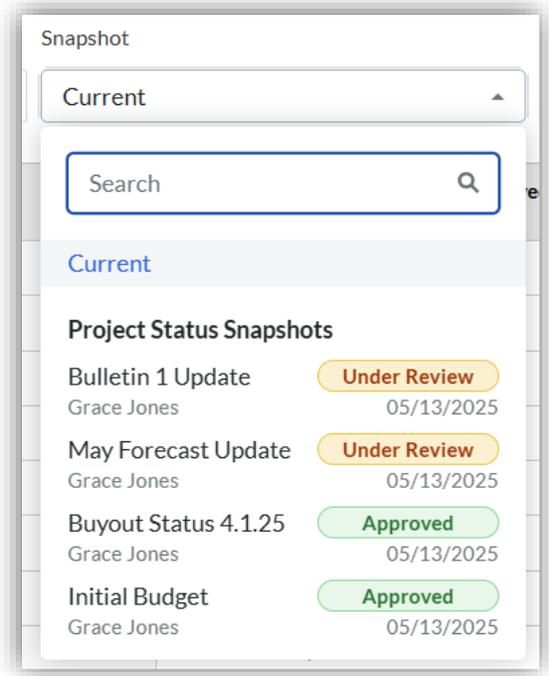
Procore Standard Budget View
▼

Description

* required fields

Cancel
Create

- When you have taken a snapshot, you can compare to the current budget or to another snapshot.
 - Select one of the two snapshots you want to compare.



- Select the second snapshot you want to compare and the columns to analyze.

Analyze Variance

Select Comparison Columns to Analyze Variance

Comparison Snapshot *

Initial Budget

Columns to Display *

Comparison Column and Variance Column

Comparison Column Only

Variance Column Only

Comparison Columns

Committed Costs

Direct Costs

Job to Date Costs

Pending Cost Changes

Projected Costs

Forecast To Complete

Estimated Cost at Completion

Projected over Under

- Review the comparison and/or variance columns.

Projected over Under	Projected over Under	Projected over Under
	Initial Budget	Variance
\$68,000.00	\$0.00	\$68,000.00

- All Project Status Snapshots will be visible in the Project Status Snapshot tab of the Budget tool
 - Here you can compare every snapshot, showing the month over month variance for any budget view column over the life of the project

Project Status Snapshots									
View									
Procure Standard Budget V...									
Name	Projected Costs			Forecast To Complete					
	Current	Previous	Variance	Current	Previous	Variance			
Test	\$470,300.00	\$468,300.00	\$2,000.00	\$5,242,323.00	\$5,229,823.00	\$12,500.00			
July Update	\$468,300.00	\$461,700.00	\$6,600.00	\$5,229,823.00	\$5,229,823.00	\$0.00			
June Update	\$461,700.00	\$447,100.00	\$14,600.00	\$5,229,823.00	\$5,229,823.00	\$0.00			
May Update	\$447,100.00	\$419,100.00	\$28,000.00	\$5,229,823.00	\$5,229,823.00	\$0.00			
April Update	\$419,100.00	\$411,500.00	\$7,600.00	\$5,229,823.00	\$5,229,823.00	\$0.00			
March Update	\$411,500.00	\$411,500.00	\$0.00	\$5,229,823.00	\$5,303,923.00	(\$74,100.00)			
Bulletin 1 Update	\$411,500.00	\$411,500.00	\$0.00	\$5,303,923.00	\$5,252,223.00	\$51,700.00			
May Forecast Update	\$411,500.00	\$411,500.00	\$0.00	\$5,252,223.00	\$5,318,223.00	(\$66,000.00)			
Buyout Status 4.1.25	\$411,500.00	\$0.00	\$411,500.00	\$5,318,223.00	\$5,714,723.00	(\$396,500.00)			
Initial Budget	\$0.00			\$5,714,723.00					

1.38 BUDGET DETAILS TAB

The budget details tab acts as a general ledger, listing every transaction that is impacting a budget line item (e.g. commitments, direct costs, change orders).

- This tab can be grouped and filtered as needed.
- For example, group by Vendor and filter by Subcontractor cost type to view all items impacting that contractor (i.e. Commitment Change Orders, Commitments, etc)

1.39 BUDGET MAINTENANCE

1.39.1 ADD NEW SCOPE TO THE BUDGET

- After the original budget is established in Procore, the budget will be locked by Accounting Dept. and no new Original Budget Amounts can be added to the budget.
- If there is a change in scope and new line items are needed on the budget and are included in an Owner Change Order, new lines will be added to the budget. Those new cost code items will land as unbudgeted line items in the budget.

1.39.2 UNBUDGETED LINE ITEMS

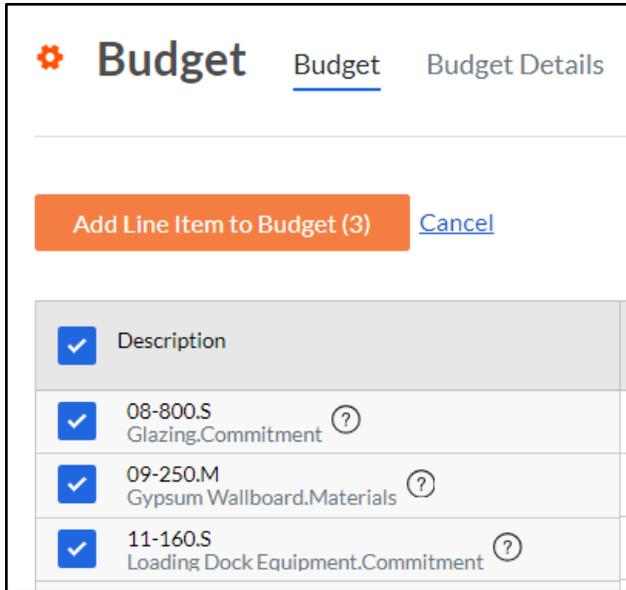
Budget line items that are denoted with  are unbudgeted.

This means that they were not included in the original estimate created in Sage that was imported into Procore as the budget. This means that they are being used elsewhere in the Financials tools.

For example, when a new scope is added to a project through a change order, the cost codes associated with that new scope (that were not included in the original budget) will appear as a None (?) line item on the budget.

If the non-budgeted line item needs to be added to the budget, select the checkbox next to the budget code and select “Add Line Item to Budget”.

- This will add the line item to the budget with a \$0 Original Budget Amount.



1.40 FORECASTING

1.40.1 FORECAST TO COMPLETE (FTC)

The Project Manager is responsible for updating the Forecast to Complete column to estimate what remains to be completed on a project on a regular basis.

Updating the FTC Column:

- Auto Calculation – Default calculation to assume that the entire budget line item will be spent.
 - Calculated as Projected Budget - Projected Costs
 - When left as automatically calculated, this will show the remaining uncommitted value of that line item
- Manual Entry – Input manual entry if you are forecasting spending more or less than the original budget line item.
- Lump Sum Entry - See Advanced Forecasting below
- **Monitored Resources** - Forecasts your projected costs based on the specific resources used

one that line item (i.e. labor), resource rates, time and date, and utilization rate. PLUG IN YOUR GCs and get real-time insight on weekly cost impacts!!!!

- Procore automatically draws down the 'Forecast to Complete' amount as time passes when this option is used.
- When entered correctly, the Forecast to Complete column will decrease at a similar rate as the Direct Costs column increases. When additional insights on future Direct Costs on a line item are gathered, the Monitored Resources inputs can be modified to provide as accurate a forecast as possible.

Forecast To Complete for 01-220.L ✕

Calculation Method:
 Automatic Calculation \$350,000.00
 Manual Entry
 Lump Sum Entry
 Monitored Resources

Notes:

Description	Start Date	End Date	Units Remaining	Unit Cost	Utilization	Calculated Unit Cost	Forecast To Complete	Planned	
Sr. Superintendent	05 / 01 / 2025	05 / 31 / 2026	54 weeks	\$3,440.00	100 %	\$3,440.00	\$185,760.00	\$196,080.00	
Asst. Superintendent	08 / 01 / 2025	07 / 31 / 2026	53 weeks	\$2,640.00	100 %	\$2,640.00	\$139,920.00	\$139,920.00	
Asst. Superintendent	07 / 31 / 2026	09 / 30 / 2026	9 weeks	\$2,640.00	75 %	\$1,980.00	\$17,820.00	\$17,820.00	
Total							\$343,500.00	\$353,820.00	

1.40.2 ADVANCED FORECASTING

Future Enhancement: additional guidance on Advanced Forecasting to be provided soon.

BUDGET CHANGES

A Budget Change (formerly Budget Modification) is considered any internal change to the budget that does not require Owner Approval AND DOES NOT NEED TO BE REFLECTED IN YOUR BILLING. Budget changes as a result of external (owner contract changes) will be covered in the Change Management SOP.



The Budget Changes functionality will be used for:

- Moving money around GCs/GRs when you have a Lump Sum GCs/GRs provision in your Owner Contract.
- Moving money from one Cost Type to another Cost Type within the same Budgeted Cost Codes.
- Lump Sum Contract where the activity does not need to show up on the billing.
- Removing fee from the budget.
- Removing estimated cost (recognizing profit) in the budget.

IMPORTANT: A Prime Contract Change Order (PCCO) should be used instead of a Budget Change if:

- You are performing an allowance draw.
- You are using contingency.
- You are accounting for any transaction that will affect the values or line items on the G703.
- There is a contract language or schedule impact associated with it.

1.41 FINANCIAL REPORTS

1.41.1 PROCORE SAGE 300 REPORT

- Original budget
- Original budget units
- Approved budget changes
- Revised budget
- Original commitments
- Commitment invoices
- Job to date costs
- Month to date costs

1.41.2 MY ASSISTANT REPORTS

Sage Crystal reports will continue to be used. Keep in mind the timing of the reports and the current data in your project’s budget.

NOTE: If looking for specific information - reach out to accounting for specific reports.

1.42 BUDGET PERMISSIONS

Budget Permission Levels by Project Role

Permission	Read Only	Standard	Admin
ADMIN			X
APM / PM / SPM / PX		X	
A SUP / SUP / AS / GS / SQP	NONE		
INTERN	X		
LAB / FRM / CARP	NONE		
PA		X	
PC	X		
PE / FE		X	

1.43 BUDGET FAQs

Q: Why is there a discrepancy between my Procore budget and the Sage Crystal reports?

A: When a PCCO is created, the Sage budget and reports will not reflect that change until it is approved and has been synced with Sage. This can lead to a temporary discrepancy between Procore and the Sage Crystal reports.

Other reasons there may be a discrepancy:

- User/processing error
- Syncing error
- Timing issue (the data syncing between Procore and Sage does not always happen instantaneously)

Q: How do I update the Sage estimate?

A: There are two ways to update your estimate in Sage.

1. Re-sync the budget by selecting “Re-send to ERP”.
2. Approving and syncing PCCOs.

Q: What do I do if I need a new budget line item?

A: Refer to the “Create Budget Line Item” or “Create Budget Change” sections above.

Q: Why are some line items on my budget red?

A: Red line items on the budget typically mean there is an overrun on that line item or that you have committed costs beyond your projected budget. Examples:

- You have approved a Commitment Change Order (CCO) and therefore have increased your costs on that line item, but have not yet approved the Prime Contract Change Order (PCCO) so you have no corresponding increase to that budget line item.
- Projected costs added to the Forecast to Complete column (FTC) are higher than your Projected Budget.
- Note, any negative item will cause a line to go red, even if there is a positive variance.

PMs are responsible for making sure that red lines on the budget are addressed and brought back to black.

SUBCONTRACTOR INVOICING

As of October 2025 for Seattle and San Diego and end of Q1 2026 for the Bay Area and Chicago, Skyline will be using Procore’s Invoicing Tool for all Subcontractor Invoicing. Please refer to that user guide for the policy and process.

