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# Welcome to Procore

The following SOPs have been identified during Procore Implementation and outline our Company’s current Best Practices and Project Workflows moving forward. All listed team members will be required to follow our SOPs in Procore on their respective projects.

## Admin Team (List of Procore Admins at our Company - Internal Procore Committee)

* [List Users and Roles]

# Procore Support Resources

**For any process specific questions, best practices or questions on permissions, please contact someone from the Procore Admin Team:** [List Procore Administrators Here]

* For technical questions, please contact Procore’s Online Support.
* Online resources include How-to documents, How-To videos, and Live Chat: (<https://support.procore.com/references/contact-support>)
	+ Support Center:(<https://support.procore.com/>)
	+ Live Chat:Available via Procore Website and “?” in top right of your Procore Account
	+ Phone: US: 833-277-6267 (toll-free)
	+ Email:(support@procore.com)
* Training Videos:(<https://support.procore.com/references/training-videos>)
* Continuing Education**:**(<https://learn.procore.com/series/continuing-education>)
* Webinars:(<https://www.procore.com/virtual-training>)
* Portfolio Financials Support Center:<https://intercom.help/honestbuildings/en/>
	+ Live Chat:Available via Portfolio Financials 9am-6pm EST
	+ Email:(support-owners@procore.com)
* Integrations
	+ [GoToMeeting](https://support.procore.com/integrations/go-to-meeting)
	+ [Microsoft Office 365](https://support.procore.com/integrations/microsoft-365)
	+ [Procore Gmail](https://support.procore.com/integrations/gmail-addon)
	+ [Procore Outlook](https://support.procore.com/integrations/procore-outlook-addin)
	+ [Zoom](https://support.procore.com/integrations/go-to-meeting)

#

# Standard Project Template(s)

Set up pseudo project(s) with common settings to use as a template for creating new projects, saving time and ensuring project standardization.

## Tool Location in Procore

Company Level Portfolio **- Standard Project Template** ([User Guide](https://support.procore.com/products/online/user-guide/company-level/portfolio/tutorials/configure-a-project-template))

## Things to Consider

Procore recommends setting up the Standard Project Template(s) as early as possible as settings DO NOT apply retroactively to existing jobs.

Determine the various types of templates required; i.e. classified by Project Type.

**Permissions:**

Internal **[Role(s)]** have access to configure settings in the Standard Project Template(s)

## Company Workflow

1. Internal **[Role(s)]** will create, manage and maintain additional Project Template(s)

#

# Procore Custom Solutions

Procore allows customers to make *select* customizations to the platform.

Customers are encouraged to exercise the allotted hours on items such as Custom Workflows, PDFs, Fields and Tools. - ([User Guide](https://support.procore.com/products/online/custom-solutions))

Procore also offers additional professional services that may be purchased. - ([User Guide](https://support.procore.com/customer-success/add-on-service-products))

## Things to Consider

Such customizations must be processed by Procore’s Custom Solutions Team.

Consider discussing best practices with an IM/CSM prior to submitting requests.

## Company Workflow

1. **Internal [Role(s)]** will submit custom requests to the Custom Solutions Team.
2. **Internal [Role(s)]** will approve services rendered by Custom Solutions Team.

#

# Company Admin Settings

Full Company Level Administrators will have full visibility into your Procore account. This permission level allows for configuration of all company level administrative settings including project settings, tool template set up, and company-wide reports.

## Tool Location in Procore

Company Level - **Admin** ([User Guide](https://support.procore.com/products/online/user-guide/company-level/admin/tutorials/configure-advanced-settings-company-admin))

## Procore Certification - Procore Admin

Recommended Training Resource for Procore Administrators - [Training Video](https://support.procore.com/certification#procore-admin)

## Things to Consider

It is important to be selective with who has access to this module. Procore recommends assembling a small group of individuals (ie-- Procore Administrators) to manage Company wide Administrative Settings. It is advisable to share this tool with internal individuals only.

The settings in the Company level Admin tool's sidebar are organized into three (3) distinct groups:

* Company Settings
* Project Settings
* Tool Settings

**Permissions:**

Internal **[Role(s)]** have access to Company Level Admin

## Company Workflow

1. Internal **[Role(s)]** will set up *Company Settings*
	1. **Account Information** - View Account Information - *Reference Only*
	2. **App Management** - Manage Integrated Apps
	3. **Certification Analytics** - View Certification Analytics
	4. **Classifications** - Add a Classification - [List Process]
	5. **Cost Codes** - Add, Edit, and Delete Company Cost Codes - [List Process]
	6. **Cost Types** - Set Default Cost Types- [List Process]
	7. **Expense Allocations** - Create a New Expense Allocation - [List Process]
	8. **General Settings**
		1. Add additional Office Location if applicable - [List Process]
		2. Update the Employer Identification Number for Your Company's Procore Account
		3. Upload a Company Logo
		4. Upload an Office Logo
	9. **Root Cause Analysis** - Add Root Cause Analysis Fields - [List Process]
	10. **Trades -** Add a Custom Trade - [List Process]
2. Internal **[Role(s)]** will set up *Project Settings*
	1. **Dates** - Add New Project Dates
	2. **Defaults** - Set the Defaults for Your Projects
		1. Add a Custom Project Stage - [List Process]
		2. Add a Custom Project Type - [List Process]
		3. Add a Custom Department - [List Process]
		4. Add a Custom Program - [List Process]
		5. Add a Custom Bid Type - [List Process]
		6. Add a Custom Owner Type - [List Process]
		7. Add a Custom Project Region - [List Process]
		8. Enable the DocuSign Integration in Your Company's Account
	3. **Fieldset** - Select fields for Project Creation
	4. **Roles** - Add a Custom Project Role
3. Internal **[Role(s)]** will set up *Tool Settings*
	1. **Bidding** - Add a Custom Bid Type, Set the Default Company Bidding Configuration
	2. **Budget** - Manage Custom Budget Reports
	3. **Change Management** - Manage Default Change Management Configurations
	4. **Directory** - Manage Fieldsets
	5. **Daily Log** - Manage Fieldsets for Manpower, Notes, DCR, Weather and Custom Fields for Manpower
	6. **Forms** - Manage Company Level Form Template
	7. **Incidents** - Manage Fieldsets, Alerts and Severity Settings
	8. **Meetings** - Manage Meeting Templates
	9. **Observations**- Manage Custom Observation Types, Templates, Custom Fields and Fieldsets
	10. **Punch List** - Manage Custom Punch Item Templates, Custom Fields and Fieldsets
	11. **RFIs** - Manage Fieldsets
	12. **Submittals** - Manage Custom Submittal Log Statuses, Types and Fieldsets
	13. **Tasks** - Manage Task Categories and Status
	14. **Tax Codes** - Configure Tax Code Settings
	15. **Time Tracking** - Manage Time Tracking Settings

# Company Inspections

Full Company Level Administrators are able to set up company level inspection templates or “checklists” to be used across all projects. These “checklists” can be reused and customized on individual construction projects as needed.

## Tool Location in Procore

Company Level - **Inspections** ([User Guide](https://support.procore.com/products/online/user-guide/company-level/inspections))

## Things to Consider

Determine the various types of Company Inspection Templates to add and who will have the ability to create them. It is advisable that this tool is shared with internal individuals only.

**Permissions:**

Internal **[Role(s)]** have access to Company Level Inspections

## Company Workflow

1. Internal **[Role(s)]** will create, manage and maintain Company Level Inspection Templates.

#

# Company Directory

Full Company Level Administrators are able to create, import, and store an unlimited number of contacts in this master list for easy transfer into any project.

## Tool Location in Procore

Company Level - **Directory** ([User Guide](https://support.procore.com/products/online/user-guide/company-level/directory))

## Things to Consider

**Suggested Prerequisite:** Procore recommends setting up Company Level Permissions before adding contacts into the Company Directory. This ensures that individuals are added with the appropriate provisions.

**[Best Practice]:** During the initial setup, Procore recommends the use of Directory Import Templates to bulk add contacts and auto assign default permission templates.

**Permissions:**

Internal **[Role(s)]** have access to Company Level Directory

## Company Workflow

1. Internal **[Role(s)]** will create, manage and maintain Company Level Directory

#

# Project Creation

Our Team will be using Procore to manage these types of projects: List Project Types

## Tool Location in Procore

Company Level Core Tool - **Portfolio**

## Company Workflow

1. **[Role(s)]** will create projects in our Procore Account ([User Guide](https://support.procore.com/products/online/user-guide/company-level/portfolio/tutorials/add-a-new-project)).
2. **[Role(s)]** will add the listed information to projects once created.
	1. [List Specific Information]

#

Procore Tools

# Project Admin

Internal Project Administrators can configure project settings and preferences to suit your specific project needs.

## Tool Location in Procore

Project Level Core Tool - **Admin** ([User Guide](https://support.procore.com/products/online/user-guide/project-level/admin))

## Things to Consider

Meant to be shared with Internal users only. Determine who is able to modify project settings and preferences.

**Permissions:**

Internal **[Role(s)]** have **[Permission Level]**

## Company Workflow

1. **[Role(s)]** is responsible for making sure the correct project level cost codes are configured.
2. **[Role(s)]** is responsible for creating locations on the project to report items in a specific location like punch list, RFIs,Submittals,Observations, etc.
	1. Best Practice: Project locations will be managed within the Project Admin tool or Procore’s Import app.
3. Internal **[Role(s)]** is responsible for modifying/editing any project admin related information.
4. Internal **[Role(s)]** is responsible for enabling sub jobs and applying the proper cost codes per sub job. Sub jobs allow us to break out our financials into phases or locations.
5. Internal **[Role(s)]** is responsible for setting Working Days if they differ from what’s been set in the Project Template.

#

# Project Directory

Users added to the Project Directory will be able to see the project and collaborate based on their given project permissions.

## Tool Location in Procore

Project Level Core Tool - **Directory** ([User Guide](https://support.procore.com/products/online/user-guide/project-level/directory))

## Things to Consider

Determine who is able to view and edit Project Directory.

**Permissions:**

**[Role(s)]** can/is responsible for adding users to the project from the company directory?

**[Role(s)]** can/is responsible for creating or editing users (assignable permission template only)?

**[Role(s)]** can/is responsible for creating and editing companies? Or will this be managed at the company level?

**[Role(s)]** can/is responsible for removing users from a project?

**[Role(s)]** can/is responsible for removing companies from a project?

**[Role(s)]** can/is responsible for viewing company insurance information? OIr will this function be used?

## Company Workflow

1. [**Internal [Role(s)] who’s managing Directory Fieldsets.**](#_mwbm0pyjkzjs)
2. Internal **[Role(s)]** will pull internal contacts and awarded contract contacts/companies and other external project members/companies from the Company Directory to the Project Directory.
3. If the person does not exist in the Company Directory, **list your process for adding new contacts.**
4. **[Role(s)]** are responsible for creating Default Project Distribution Groups for the purpose of i.e.) Report Distribution etc.
5. **[Role(s)]** will send invites to external and internal users if people need to be added throughout the course of the project.

#

# Project Documents

Manage and archive project specific documentation. Meant to store miscellaneous documentation that does not fit in another Procore tool.

## Tool Location in Procore

Project Level Core Tool - **Documents** ([User Guide](https://support.procore.com/products/online/user-guide/project-level/documents))

## Tool Priority

Please identify if this is a high/low priority tool and if the Company will be utilizing this tool on initial Procore Rollout. Specify if this tool will be phased in later: List Priority

## Things to Consider

**[Best Practice]** *Procore Drive:* Users who maintain the Documents Tool are advised to use Procore Drive. Note: users will need to run Windows 7 or newer operating systems. Please use this [Support Article](https://support.procore.com/products/procore-drive) to familiarize yourself with Procore Drive and install it to your computer.

**[Best Practice]** Upload Standard Folder Structure into Documents tool of Standard Project Template for reuse.

**Permissions:**

Internal Team has **[Permission Level]**

Contractor(s) have **[Permission Level]**

Consultants have **[Permission Level]**

Vendors have **[Permission Level]**

## Company Workflow

1. Internal **[Role(s)]** will upload initial project documentation.
	1. Please list documents that will be stored in this tool:

[List Documentation Types]

1. Internal **[Role(s)]** will manage folder permissions, folder trackers,
2. **[Role(s)]** will continue to maintain project documentation throughout the project lifespan.

# Project Tasks

Track and manage administrative action items during the project's lifespan. Ideal for managing *administrative* tasks that *do not* have a direct impact on construction, scheduling or cost.

## Tool Location in Procore

Project Level Core Tool - **Tasks** ([User Guide](https://support.procore.com/products/online/user-guide/project-level/tasks))

## Tool Priority

Please identify if this is a high/low priority tool and if the Company will be utilizing this tool on initial Procore Rollout. Specify if this tool will be phased in later: List Priority

## Things to Consider

Determine whether the Tasks tool will be restricted to internal users or will incorporate external users.

[**[Best Practice] Set up Tasks categories in Company Level Admin**](#_mwbm0pyjkzjs)

**Permissions:**

Internal Team has **[Permission Level]**

Contractor(s) have **[Permission Level]**

Consultants have **[Permission Level]**

Vendors have **[Permission Level]**

## Company Workflow

1. Internal **[Role(s)]** will assign and manage completion of tasks
2. Tasks will be assigned to Internal **[Role(s)]** or **[Role(s)]**
3. Internal **[Role(s)]** will add comments to tasks as needed

#

#

# Project Reports

Generate detailed reports on status and trends across all open items across the entire project.

## Tool Location in Procore

Project Level Core Tool - **Reports** ([User Guide](https://support.procore.com/products/online/user-guide/project-level/reports))

## Tool Priority

Please identify if this is a high/low priority tool and if the Company will be utilizing this tool on initial Procore Rollout. Specify if this tool will be phased in later: List Priority

## Things to Consider

Determine who has access to view canned or create custom reports.

**Permissions:**

Internal Team has **[Permission Level]**

Contractor(s) have **[Permission Level]**

Consultants have **[Permission Level]**

Vendors have **[Permission Level]**

## Company Workflow

1. Internal **[Role(s)]** will create default Custom Project Reports
	1. Default Custom Reports will include:

[List Report Name]

* 1. Default Custom Reports are to be shared with Internal **[Role(s)]** or **[Role(s)]** at this cadence [List Cadence]

#

#

# Project Bidding

Solicit bids for projects while providing a central location for managing and viewing the status of all bids. Contractors can download bid packages from Procore and submit bids directly back into the system.

## Tool Location in Procore

Project Level Preconstruction Tool - **Bidding** ([User Guide](https://support.procore.com/products/online/user-guide/project-level/bidding))

## Tool Priority

Please identify if this is a high/low priority tool and if the Company will be utilizing this tool on initial Procore Rollout. Specify if this tool will be phased in later: List Priority

## Things to Consider

**[Best Practice]** Prior to creating bid packages,determine where Bid Documents will be stored.

e.g.) Upload Bid set of Plans into Drawings, Specs into Specifications, and other Bid Documents into a specified folder in the Documents tool.

**[Best Practice]** Ensure that all applicable fields are completed to initiate effective reporting and maintain backup documentation.

## Company Workflow

1. Internal **[Role(s)]** will be creating project Bid Packages (includes attaching bid documents, drawings and/or specifications, then sending out invites to bid).
	1. Bid Packages will be broken down/grouped by trade/scope/contractor/vendor/phase: [List your process]
	2. Bid Sheets can be itemized or lump sum. If Itemized, will your contractors need to add cost codes from the project to add to their bid sheet?: [List your process]
	3. If no above, **[Role(s)]** will confirm in the Bidding Tool Configurations that this setting is deselected.
	Note: If applicable, determine whether Bid Administrators will pre-itemize cost codes to Vendor records in the Company Directory tool to save time.
2. Internal **[Role(s)]** should be added to the “Primary Bidding Contact” on the project bid package.
3. Internal **[Role(s)]** should be added to the “Bidding CC Group” to be notified when bids are submitted.

# Project Drawings

Project Drawings helps to ensure that all team members have access to the most current drawing sets at all times.

## Tool Location in Procore

Project Level Project Management Tool - **Drawings** ([User Guide](https://support.procore.com/products/online/user-guide/project-level/drawings))

## Tool Priority

Please identify if this is a high/low priority tool and if the Company will be utilizing this tool on initial Procore Rollout. Specify if this tool will be phased in later: List Priority

## Things to consider

Approvals of Drawing Sets by Phase:

1. **[Best Practice]** If drawings require internal or external approval, Procore advises to use the Submittals tool to capture the approval process.
	1. Consider creating a new classification for Submittal Type to associate to drawing set approvals for accurate reporting.
		1. [**Internal [Role(s)] to set up Submittal Type in Company Level Admin.**](#_mwbm0pyjkzjs)
		2. **[Role(s)]** to create submittal and send to **[Role(s)]** for approval
		3. [**Internal [Role(s)]**](#_r7qcaadfvrst) will determine whether Drawings by Area will be utilized.
2. **[Best Practice]** If Drawing approvals require correspondences between Consultants/Designers etc, Procore advises to use the RFIs tool to capture responses to individual questions.

**Permissions:**

Internal Team has **[Permission Level]**

Contractor(s) have **[Permission Level]**

Consultants have **[Permission Level]**

Vendors have **[Permission Level]**

## Company Workflow

1. Once Drawings are approved, **[Role(s)]** will upload Project Drawings (Construction Set, Addendums, Revisions, Shop Drawings, etc.).
2. **[Role(s)]** will review uploaded Project Drawings (Construction Set, Addendums, Revisions, Shop Drawings, etc.).
3. **[Role(s)]** will publish Project Drawings for our field team and other non-admins to be able to reference.
4. **[Role(s)]** will reference the drawings from the field on the Procore Mobile Application.
5. **[Role(s)]** will make markups on the drawings to link RFIs, Photos, Punch List Items, Submittals, and more.
6. These **[Role(s)]** will add **ALL field users** to the drawing log subscription list in the configurations settings of the project’s Drawings Tool
7. These **[Role(s)]** will enable drawings by area in the configuration settings of the projects’s Drawings Tool. Examples: Drawing areas by floor or structure.

#

# Project Specifications

Specifications help to ensure that the most current project specs are distributed to the appropriate parties resulting in increased accuracy of items being installed and reduces risks.

Specifications allow for mobile accessibility and the automated creation of a Submittal Register.

## Tool Location in Procore

Project Level Project Management Tool - **Specifications** ([User Guide](https://support.procore.com/products/online/user-guide/project-level/specifications))

## Tool Priority

Please identify if this is a high/low priority tool and if the Company will be utilizing this tool on initial Procore Rollout. Specify if this tool will be phased in later: List Priority

## Things to Consider

**[Best Practice]** Allow Contractors to have Standard rights to Specifications to be able to:

1. Create a submittal register off Specifications using Submittal Builder.

**Permissions:**

Internal Team has **[Permission Level]**

Contractor(s) have **[Permission Level]**

Consultants have **[Permission Level]**

Vendors have **[Permission Level]**

## Company Workflow

1. **[Role(s)]** will be uploading Project Specifications (Project set and Revisions/Addendums).
2. **[Role(s)]** will review and publish uploaded Project Specifications (Project set and Revisions/Addendums).
3. **[Role(s)]** will reference the specifications from the field on the Procore Mobile Application.

#

# Project Request For Information (RFIs)

Allows users to manage correspondences real time between Owner/Contractor/Consultant by documenting questions and official responses. Have complete oversight of the RFI process to reduce costly risks and manage user accountability.

## Tool Location in Procore

Project Level Project Management Tool - **RFIs** ([User Guide](https://support.procore.com/products/online/user-guide/project-level/rfi))

## Tool Priority

Please identify if this is a high/low priority tool and if the Company will be utilizing this tool on initial Procore Rollout. Specify if this tool will be phased in later: List Priority

## Thing to Consider

Determine whether an RFI Manager role is necessary on a given project. RFI Managers are the default gatekeepers of questions between the Contractors and Consultants/Designers. If questions require internal review, use the default RFI Manager setting. If questions do not require internal review, do not use the default RFI Manager setting.

**Permissions:**

Internal Team has **[Permission Level]**

Contractor(s) have **[Permission Level]**

Consultants have **[Permission Level]**

Vendors have **[Permission Level]**

## Company Workflow

1. [**Internal [Role(s)] who’s managing RFI Fieldsets.**](#_mwbm0pyjkzjs)
2. **[Role(s)]** will initiate project RFIs.
3. **[Role(s)]** will be assigned project RFI for a response.
4. **[Role(s)]** will be responsible for managing and closing project RFIs once a response is submitted
5. **[Role(s)]** to add **[Role(s)]** to default distribution in the project RFIs Tool to be kept in the loop.

# Project Submittals

Manage and track approvals for all required project Submittals, custom items and product lead times. Automated workflows allow Contractors/Consultants/Suppliers/Vendors to collaborate real time off one platform. Users can leverage the Submittal Builder tool to create the entire Submittal Register off Project Specifications.

## Tool Location in Procore

Project Level Project Management Tool - **Submittals** ([User Guide](https://support.procore.com/products/online/user-guide/project-level/submittals))

## Tool Priority

Please identify if this is a high/low priority tool and if the Company will be utilizing this tool on initial Procore Rollout. Specify if this tool will be phased in later: List Priority

## Things to Consider

**[Best Practice]** Allow Contractors to have full Admin rights to Submittal to be able to:

1. Create a submittal register off Specifications
2. Submit directly to Consultants/Designers for approval
3. Close and distribute submittals once response is received

**[Best Practice]** Allow Consultants and Designers Standard rights to be able to:

1. Approve a Submittal and provide comments.

**Permissions:**

Internal Team has **[Permission Level]**

Contractor(s) have **[Permission Level]**

Consultants have **[Permission Level]**

Vendors have **[Permission Level]**

## Company Workflow

1. [**Internal [Role(s)] who’s managing Submittal Fieldsets.**](#_mwbm0pyjkzjs)
2. **[Role(s)]** will create project Submittals.
	1. Submittals will be created from the Published Specifications, manually or through the Submittal Import Template: List your process
3. **[Role(s)]** will oversee the project Submittals process (Submittal Manager).
4. Building the submittal workflow: This will be our typical Submittal Workflow: Delete the Workflow that does not apply or modify the table.

Recommended Owner with External GC Workflow

|  |  |
| --- | --- |
| External GC | Submitter/Approver |
| Architect/Engineer | Approver |

Recommended Owner with Internal GC Workflow

|  |  |
| --- | --- |
| Subcontractor | Submitter |
| Internal GC - PM | Approver |
| Architect/Engineer | Approver |

1. **[Role(s)]** will close and distribute the final response for the project Submittals.
2. **[Role(s)]** should be notified and distributed the final response of the Submittal.
3. **[Role(s)]** to add **[Role(s)]** to the default distribution list of project Submittals to be kept in the loop.

#

# Project Meetings

Manage all aspects of the project meetings from agenda distribution to post-meeting approval of minutes. Use customizable meeting templates, categories, and video conferencing integrations to streamline the entire process.

## Tool Location in Procore

Project Level Project Management Tool - **Meetings** ([User Guide](https://support.procore.com/products/online/user-guide/project-level/meetings))

## Tool Priority

Please identify if this is a high/low priority tool and if the Company will be utilizing this tool on initial Procore Rollout. Specify if this tool will be phased in later: List Priority

## Things to Consider

**Permissions:**

Internal Team has **[Permission Level]**

Contractor(s) have [Permission Level]

Consultants have **[Permission Level]**

Vendors have **[Permission Level]**

## Company Workflow

1. **[Role(s)]** is responsible for creating meetings from scratch or from Company Meeting Templates.
2. **[Role(s)]** is responsible for Distributing the Meeting Agenda. List Company process and how soon the Agenda and invite should be sent prior to the meeting: List your process
3. **[Role(s)]** is responsible for recording the meeting minutes.
4. **[Role(s)]** is responsible for distributing the meeting minutes to attendee list.
5. **[Role(s)]**is responsible for creating the follow-up meeting to track old vs new business for recurring meetings.
6. Indicate if you will be hosting Procore related meetings to keep internal and external collaborators up to speed on the project: List your process

# Project Daily Logs

​​Procore's Daily Log tool is designed to provide members of the project team with a central location for viewing, tracking, and emailing updates about daily project activities such as labor, communication, equipment, materials, etc.

## Tool Location in Procore

Project Level Project Management Tool - **Daily Log** ([User Guide](https://support.procore.com/products/online/user-guide/project-level/daily-log))

## Tool Priority

Please identify if this is a high/low priority tool and if the Company will be utilizing this tool on initial Procore Rollout. Specify if this tool will be phased in later: List Priority

## Company Workflow

1. [**Internal [Role(s)] who’s managing Daily Log Fieldsets.**](#_mwbm0pyjkzjs)
2. **[Role(s)]** is responsible for creating the daily log on the Procore mobile application.
3. In Manpower, Notes, Daily Construction Report and Deliveries, indicate whether Contractors will enter draft logs for approval. List your process
4. These are the daily logs that we will be tracking on a daily basis: List your process and Indicate Procore defaults
5. **[Role(s)]** will Complete and Distribute the Daily Log every day.
6. **[Role(s)]** will email the daily log from mobile or web as necessary outside of complete and distribute.

#

# Project Photos

Easily capture, store, and share your project photos in a secure online archive. Use your smartphone or tablet to quickly take a progress photo, add markups, and instantly share it with other team members.

## Tool Location in Procore

Project Level Project Management Tool - **Photos** ([User Guide](https://support.procore.com/products/online/user-guide/project-level/photos))

## Tool Priority

Please identify if this is a high/low priority tool and if the Company will be utilizing this tool on initial Procore Rollout. Specify if this tool will be phased in later: List Priority

## Company Workflow

1. **[Role(s)]** is responsible for creating and managing project photos albums.
2. List project album types that should be created (Mock-ups, Site Visit, etc): List your process
3. **[Role(s)]** is responsible for taking/ uploading/ and marking up photos on the Procore mobile application.
4. List how often and what type of photos should be uploaded: List your process

#

# Project Budget

Realtime comparison of the Project budget against committed cost throughout construction lifecycle. Aggregates data from commitments as well as internal costs tools allowing for an accurate analysis of the estimated cost of completion. Manage and forecast Project Over/Under.

Tool Location in Procore

Project Level Project Financial Management Tool - **Budget** ([User Guide](https://support.procore.com/products/online/user-guide/project-level/budget))

## Tool Priority

Please identify if this is a high/low priority tool and if the Company will be utilizing this tool on initial Procore Rollout. Specify if this tool will be phased in later: List Priority

## Company Workflow

* Budget Approvals to pass from **[Role(s)]** to **[Role(s)]** for review before upload.
	1. Users **without** Portfolio Financials are advised to use Submittals to track approvals of Project Budget.
	2. Users **with** Portfolio Financials, please see Portfolio Financials [xxxxxxx] section.
* Once approved, Internal **[Role(s)]** will create the project budget
	1. Use “Create Budget Line Item” Action to build the budget in Procore line by line.
		1. Effective for smaller project scopes.
	2. Use “Import Budget - Download Excel Template” Action to download a list of project cost codes to associate cost types, Unit of Measure, and/or budget amounts in bulk.
		1. Effective method for larger project budgets and for those used to using an excel template.
	3. Cost Types give the ability to report, filter, and group our budget accordingly. List Company Cost Type abbreviations and context:
		1. Procore Standards (L = Labor, E = Equipment, M = Materials, S = Commitment, OC = Owner Cost, SVC = Professional Services, O = Other)List your Cost Types
	4. Identify if you will be creating a seperate line for financial markups and contingency in your budget: List your process
* Internal **[Role(s)]** will confirm budget accuracy and lock the budget when project budget is in place for the awarded project.
* Internal **[Role(s)]** will create “Snapshots” of the budget at critical times. (This includes phases, unlocking and relocking the budget, monthly snapshots): List Process
* “Budget Modifications” are internal changes or adjustments that impact the overall budget.

Budget modification report can be run at any time on the project. Internal **[Role(s)]** are in charge of creating budget modifications and running the budget modification report. Identify if budget modifications will take place throughout the project or towards the end after assessing red lines/over on lines: List Process

* Internal **[Role(s)]** will input Forecast to Complete amounts to estimate what remains to be completed on a project.

[List Process] for:

* Auto Calculation
* Manual Entry
* Monitored Resources
* Internal **[Role(s)]** will add any non-budgeted cost codes into the budget if applicable.
* Our Standard Budget Views include the following: **Procore Standard Budget (default), List other customized budget views**. Company Admins should customize budget views if necessary in the Company Admin Tool.

#

# Project Prime Contract

Manage upstream contract if applicable. Tracking of all change orders and related items tied to Funding Source/Budget

Note: If there is no upstream Funding Source or if tracking change orders and related items between Funding Source is not necessary, disable the Prime Contract Tool.

## Tool Location in Procore

Project Level Project Financial Management Tool - **Prime Contract** ([User Guide](https://support.procore.com/products/online/user-guide/project-level/prime-contract))

## Tool Priority

Please identify if this is a high/low priority tool and if the Company will be utilizing this tool on initial Procore Rollout. Specify if this tool will be phased in later: List Priority

## Company Workflow

1. List who is paying you for your project scope (funding source(s)): List typical prime contract holders
2. Internal **[Role(s)]** will create the Prime Contract(s) in Procore.
	1. List any non-Admin users on the Prime Contract Tool (Private section) that would need to have access to the contract in Procore (funding source(s)): **[Role(s)]**
	2. Do non-Admin users need to see the Prime Schedule of Values (SOVs) in Procore: Yes/No
3. Internal **[Role(s)]** will create the Prime Contract Schedule of Values.
	1. You can quickly build the SOVs from your budget or manually. List the typical workflow: List your process
4. Internal **[Role(s)]** will add financial markups to the contract in order to reflect this in Prime Contract Change Orders by default.
5. Internal **[Role(s)]** will attach the signed contract, update the contract status, and execute the contract.
	1. List if you will be using the Docusign Integration to track contract signatures and who is responsible for enabling this on the project: List your process (Full Admins can turn on Docusign feature by default in the Company Admin Tool - Defaults Section)
6. Internal **[Role(s)]** will manage the Prime Contract in Procore.

# Project Commitments

See the status and current value of all contracts and purchase orders with Contractors/Consultants/Vendors/Suppliers. Easily track status of contracts, downstream change orders, invoices and payments.

## Tool Location in Procore

Project Level Project Financial Management Tool - **Commitments** ([User Guide](https://support.procore.com/products/online/user-guide/project-level/commitments))

## Tool Priority

Please identify if this is a high/low priority tool and if the Company will be utilizing this tool on initial Procore Rollout. Specify if this tool will be phased in later: List Priority

## Company Workflow

1. Internal **[Role(s)]** will manage the Commitments in Procore.
2. List who you typically hold a contract with: List typical project collaborators; i.e. GC, Design Firm, etc.
3. Internal **[Role(s)]** will create the Commitments in Procore.
	1. List any non-Admin users on the Commitments Tool (Private section) that would need to have access to the contract in Procore (Contractor of that scope,GC, etc).
	2. Add in default retainage, scope, and drawings/specs inclusions and exclusions for the contract.
	3. Do non-Admin users need to see the Commitment Schedule of Values (SOVs) in Procore: Yes/No
4. Internal **[Role(s)]** will create the Commitment Schedule of Values based off of the current cost codes per contract.
5. **[Role(s)]** will input Contractor SOV subtab for internal review if applicable.
	1. You can quickly convert a bid sheet to a contract or purchase order: List your process
6. In the same way that we can allow Contractors to create Invoices for approval, we can also allow Contractors to enter their detailed schedule of values breakdown here for our approval (Contractor SOV). Identify if we will be utilizing the Contract SOV Tab: List your process
7. Internal **[Role(s)]** will attach the signed contracts, update the contract status’, and execute the contracts.
	1. **[Best Practice]** List if you will be using the Docusign Integration to track contract signatures and who is responsible for enabling this on the project: List your process (Full Admins can turn on Docusign feature by default in the Company Admin Tool - Defaults Section)
	2. If you are **not** using DocuSign, list whether you would like to apply a default approval workflow to all commitments.
		1. **[Best Practice]** to apply company wide approval workflows across all projects. Internal **[Role(s)]** to submit request to Procore’s Custom Solutions team (one time action)
		2. Internal **[Role(s)]** to determine default approval process for Commitments.

#

# Project Commitment Change Orders

Display potential downstream costs on a project.

Note: Changes Order will not be initiated in this tool.

## Tool Location in Procore

Project Level Project Financial Management Tool - **Commitments > Individual Contract > Change Orders (**[**User Guide**](https://support.procore.com/faq/what-are-the-different-change-order-tiers)**)**

## Tool Priority

Please identify if this is a high/low priority tool and if the Company will be utilizing this tool on initial Procore Rollout. Specify if this tool will be phased in later: List Priority

## Things to Consider

Option 1: Enable Change Events Module - 1 Tier Commitment Change Orders

Internally log potential costs as Change Events then elevate to a Commitment Change Order to make visible to Contractor/Vendor/Consultant

Option 2: Disable Change Events Module - Enable 1 Tier Commitment Change Orders

Internally log Commitment Change Orders directly in Commitments Tool on behalf of Contractor/Vendor/Consultant

Option 3: Disable Change Events Module - Enable 2 Tier Commitment Change Orders

a: **[BEST PRACTICE]** Enable GCs to input Commitment Potential Change Orders to submit for approval

B: Disbles GC from inputting Commitment Potential Change Orders and Internally Logs Potential Change orders on behalf of Contractor/Vendor/Consultant

## Company Workflow

1. **[Role(s)]** is responsible for submitting a Commitment Potential Change Order for review.
2. Internal **[Role(s)]** is responsible for creating the Commitment Change Order, rolling in all approved Commitment Potential Change Orders and sending to the Contractor.
3. Indicate if you will be using the Docusign Integration to obtain and track change order signatures or will be manually attaching the final signed copies for backup documentation: List your process

# Project Direct Costs

Track all direct costs incurred (expenses and invoices) that are not associated with commitments, such as general conditions and self-performed work.

OR

Direct Costs has import capabilities and can function in replacement of the invoice tool. Easily import all invoices that are managed by an external party to track against associated contracts.

## Tool Location in Procore

Project Level Project Financial Management Tool - **Direct Costs** ([User Guide](https://support.procore.com/products/online/user-guide/project-level/direct-costs))

## Tool Priority

Please identify if this is a high/low priority tool and if the Company will be utilizing this tool on initial Procore Rollout. Specify if this tool will be phased in later: List Priority

## Company Workflow

1. Internal **[Role(s)]** is responsible for creating project direct costs.
	1. Identify how often direct cost should be uploaded to keep budget forecasting accurate (Every day, every week, etc.): List your process
	2. Direct Costs can be manually created or imported via the direct cost import template: List your process
2. Internal **[Role(s)]** will manage all project direct costs and check for accuracy.

#

# Project Change Events

​​Track potential change management process. Especially helpful if project contracts with multiple contractors.

## Tool Location in Procore

Project Level Project Financial Management Tool - **Change Events** ([User Guide](https://support.procore.com/products/online/user-guide/project-level/change-events))

## Tool Priority

Please identify if this is a high/low priority tool and if the Company will be utilizing this tool on initial Procore Rollout. Specify if this tool will be phased in later: List Priority

## Things To Consider:

Option 1: [**BEST PRACTICE**] Disable Change Events if Contractors initiate change orders. Enable 2 Tier Commitment Change Orders in Commitments tool. Allow Contractor/Vendor/Consultant to submit CPCOs for review.

Option 2: Enable Change Events if Changes are initiated internally.

## Company Workflow

1. Internal **[Role(s)]** will be creating Change Events in Procore.
	1. Change Events can be created from the Change Events Tool, RFI item, Observation Item, and a Meeting to create a hyperlink between items in Procore. List where Change Events are to be created: List your process
2. Indicate your change event workflow in Procore (Example: Create Change Event - Send RFQ to Vendor - Create Prime Contract Potential Change Order - Create Commitment Change Order - apply budget modification to in scope Change Orders - Create actual Prime Contract Change Order and bundle up specific Potentials): List your Process
3. Use the bulk action feature to take the change event to the next step.
4. **[Role(s)]** will be creating and sending the Request for Quotes (RFQs) in Procore.
5. Indicate your Prime Contract Change Orders Process. Do you need to send a potential or bundle potentials up? Do you go straight to an actual after pricing? Indicate which person/people is responsible for updating the Prime Contract Change Order Tier on the project. (1st Tier = actual change order, 2nd Tier = potential then actual, 3rd Tier = potential then change request then actual): List process and users
6. Internal **[Role(s)]** is responsible for creating the potential/change request/actual Prime Contract Change Order.
7. Internal **[Role(s)]** is responsible for making sure the Prime Contract Change Order Financial Markup is created and accurate.
8. Internal **[Role(s)]** is responsible for creating the Commitment Change Order.
9. Internal **[Role(s)]** are responsible for managing project Change Orders and checking for accuracy with information including change order status and amounts.
10. **[Role(s)]** is responsible for tracking/viewing all change orders in the Change Orders Tool.
11. Indicate if you will be using the Docusign Integration to obtain and track change order signatures or will be manually attaching the final signed copies for backup documentation: List your process

#

# Project Invoicing

​​View all Vendor and owner invoices with invoice amounts, invoice status, and payment status. Perform key steps of the invoicing process such as setting up billing periods, inviting to bill, sending invoices to. DocuSign (if applicable), and compiling invoice backups. Due to the sensitive nature of a project's invoicing data, this tool can only be accessed by individuals who have been granted 'Admin' level permission to the Commitments and/or Prime Contracts tool.

## Tool Location in Procore

Project Level Project Financial Management Tool - **Invoicing** ([User Guide](https://support.procore.com/products/online/user-guide/project-level/invoicing))

## Tool Priority

Please Identify if this is a high/low priority tool and if the Company will be utilizing this tool on initial Procore Rollout. Specify if this tool will be phased in later: List Priority

## Company Workflow

1. Indicate the required invoice format (ie- AIA documentation (G702 / G703)): [List your process]
2. Internal **[Role(s)]** is responsible for managing/tracking/and creating invoices on the project: List your process
3. Internal **[Role(s)]** will create the billing periods for Vendor to submit their requisitions/invoices.
	1. Automatic billing periods can be created after you manually create the first.
	2. How often (Net) will you be requesting invoices: List your process
4. Internal **[Role(s)]** will invite the Vendor to the billing period to submit invoices.
5. This person/people will review or submit an invoice on behalf of the Vendor: List Users
6. Internal **[Role(s)]** will finalize Vendor invoices.
	1. If Prime Contract is enabled and loan draws are required, Internal **[Role(s)]** will autofill Prime Contract Invoice in the billing period
7. Internal **[Role(s)]** is responsible for creating the invoice to the prime contract holder/owner.
	1. In order to copy Vendor Invoices and Direct Cost amounts from the Commitment Billing Period to the invoice the following things must be true. Reference this document to learn more about prefilling owner invoices. ([Create an Owner Invoice](https://support.procore.com/products/online/user-guide/project-level/invoicing/tutorials/create-an-owner-invoice))
8. Internal **[Role(s)]** is responsible for editing an owner Invoice's Configurable PDF View if necessary to add groupings (hide/show) certain items.
9. Internal **[Role(s)]** is responsible for emailing the prime holder/owner invoice.
10. Indicate if you will be using the Docusign Integration to obtain and track invoice signatures or will be manually attaching the final signed copies for backup documentation: List your process

#

# Portfolio Financials

Our Team will be using Portfolio Financials to track and manage the cost and milestones of {List Project Types} projects. This will allow our organization to have a high-level visibility into and better manage our forecast and business analysis.

## Tool Priority

Please identify if this is a high/low priority tool and if the Company will be utilizing this tool on initial Procore Rollout. Specify if this tool will be phased in later: List Priority

# Portfolio Financials: Approval Workflow Configuration (Pro Only)

## Tool Location in Procore

Company Dashboard - **Three-Line Menu: Company Settings**

## Things to Consider

**[NOTE]** This feature is available only to Company Administrators.

[**BEST PRACTICE**]:

## Company Workflow

1. **Internal [Company Admin(s)]** will be responsible for configuring and maintaining approval workflows.
2. Approval Workflows are configured as follows:
	1. Budgets: List your process - ex. company default, per building, per project type
	2. Bids/Contracts: List your process - ex. company default, per building, per project type
	3. Invoices: List your process - ex. company default, per building, per project type
	4. Change Orders: List your process - ex. company default, per building, per project type

# Portfolio Financials: Project Creation

## Tool Location in Procore

Company Dashboard - **Add Project** button

## Things to Consider

[**BEST PRACTICE**] Adding and deleting projects may be locked down with granular permissioning if necessary.

[**BEST PRACTICE**] Only Company Admins can add Project Types to the Procore account.

## Company Workflow

1. **Internal [Role(s)]** will create projects in our Portfolio Financials Account. ([User Guide](https://intercom.help/honestbuildings/en/articles/2169643-video-adding-a-new-project))
	1. **If your company has enabled the ERP Integrations,** review the following articles before adding a new project:
		1. [Yardi](https://support.procore.com/integrations/yardi-voyager-connector/tutorials/about)
		2. [MRI](https://support.procore.com/integrations/mri-connector/tutorials/about)
2. Add in general project setup information: *List anything that is mandatory for your team to fill in (for reporting purposes)*
	1. Projects should follow a standard naming convention: List your process
	2. Project stages should be selected under the following circumstances: List your process
	3. Our project types are defined as: List your process
	4. Project description should include: List your process
	5. Project size should be indicated as: List your process
	6. The baseline start date should indicate: List your process
	7. The baseline end date should indicate: List your process

#

# Portfolio Financials: Project Page

## Tool Location in Procore

Company Dashboard - Select any Project

## Things to Consider

* [**BEST PRACTICE**] Anyone typically responsible for updating project information should be added to the project team.
* [**BEST PRACTICE**] Milestone, cost tracker, and document folder templates may be edited to support custom scopes. Generally speaking, users should always opt to use a template for project consistency and reporting.
* [**BEST PRACTICE**] For contracts that need to be broken down and will be directly awarded, consider templatizing the schedule of values within a Cost Tracker template.

## Company Workflow

1. Internal **[Role(s)]** will be responsible for managing the project
	1. Milestones can be manually created or set up via the following template options: List your process
		1. List if specific milestones are dependent on another milestone.
		2. List if team members should be assigned to a specific milestone.
	2. Cost Trackers can be manually created or set up via the following template options: List your process
		1. Section Headers represent: List your processes
		2. Cost Items represent: List your processes
	3. Document folders can be created manually or set up via the following template options List your process
		1. Add the following documents to each folder of the project: List your processes
	4. Internal **[Role(s)]** should be included on the project team: List your processes and permission level(s).

#

# Portfolio Financials: Cost Tracking

## Tool Location in Procore

Project Overview Page - **Cost Tracker** ([User Guide](https://intercom.help/honestbuildings/en/articles/2611432-budgeting-101))

## Things to Consider

[**BEST PRACTICE**] Budget additions and revisions may be locked down with granular permissioning if necessary.

[**BEST PRACTICE**] Budget approvals should be used to ensure that drafted budgets are routed through the appropriate delegation of authority.

[**BEST PRACTICE**] The Cost Tracker is set to a default view. Company Admins can create custom views in Company Admin to add, remove or reorder the Cost Tracker columns. If utilized, list your processes in the Company Workflow section below.

[**BEST PRACTICE**] Consider tracking project costs using the Project Cost Reporting feature if tracking costs by Accounting Codes and/or if more granular detail is needed.

[**BEST PRACTICE**] Use Allocations to segment project financials into components within an umbrella Procore project. Note that this function requires a feature flag be switched on by the Procore Customer Success team.

## Company Workflow

1. Internal **[Role(s)]** will be responsible for managing the project budget.
	1. Lump Sum budgets will be created under the following circumstances: List your process
	2. Broken down budgets will be created under the following circumstances: List your process
2. Internal **[Role(s)]** will be responsible for managing budget revisions.
3. Internal **[Role(s)]** will be responsible for approving budgets (initial/and or revisions) under these circumstances: List your process
4. Internal **[Role(s)]** will be responsible for saving current forecast through the Holds tool.
	1. Holds will be used to track the following: List your process

#

# Portfolio Financials: Bidding

## Tool Location in Procore

Project Overview Page - **Cost Item Action: Bid Out** ([User Guide](https://intercom.help/honestbuildings/en/articles/2263009-setting-up-a-bid-room))

## Things to Consider

* [**BEST PRACTICE**] Anyone typically CC’d on bid communication should be added to the bid room team. It is highly important to note that the Bid Room Team is for internal team members and consultants collaborating on the RFP - vendors will be invited in a separate modal.
* [**BEST PRACTICE**] External consultants are often added to the bid room team with the ‘Hide Bidding Info’ permission delegation, which allows that user to upload documents and respond to RFIs while preventing them from viewing the bids received from vendors.
* [**BEST PRACTICE**] Bid form templates may be edited to support custom scopes. Generally speaking, users should always opt to use a bid form in order to aggregate consistent data.

## Company Workflow

1. The following cost items and/or trades will be bid out as opposed to directly awarded: List your processes.
2. Internal **[Role(s)]** will be responsible for bidding out cost items: List your processes.
	1. Sealed bidding will be used in the following circumstances: List your processes.
	2. RFP square footage should be indicated as: List your processes.
	3. RFP Description should include: List your processes.
	4. Beyond the bid due date, bids should include: List your processes.
	5. The following documents should be included in a standard RFP package: List your processes.
	6. Internal **[Role(s)]** should be included on the bid room team. Where appropriate, External **[Role(s)]** may be included on the bid room team with: List your processes and permission level(s).
3. Internal **[Role(s)]** will be responsible for setting up the RFP bid form via the following template options: List your processes.
4. Internal **[Role(s)]** will be responsible for answering RFIs received from vendors, or assigning RFIs to the relevant team member(s) when appropriate.
	1. RFIs received offline will be routed through the following workflow: List your processes.
5. **[Role(s)]** will be responsible for leveling the bids received from vendors. The bidding sheet may be exported as necessary.
	1. Best and final rounds will be held under the following circumstances: List your processes.
	2. Bidders will be frozen out of the bid room under the following circumstances: List your processes.
6. Following the leveling process, **Role(s)]** will be responsible for awarding the contract, and if relevant, routing it through the necessary approval workflow.
	1. Note that contract approvals will follow the same approval workflow regardless of whether they were bid out or directly awarded.
7. Internal **[Role(s)]** will be responsible for approving bids under these circumstances: List your process

#

# Portfolio Financials: Contract Management

## Tool Location in Procore

Project Overview Page - **Cost Item Action: Add Contract** ([User Guide](https://intercom.help/honestbuildings/en/articles/260876-contract-room-overview))

## Things to Consider

* [**BEST PRACTICE**] Contract approvals should be used to ensure that awarded contracts are routed through the appropriate delegation of authority.
* [**BEST PRACTICE**] The user that sends a contract out for approval will be notified when the workflow is complete; this notification will prompt the user to finalize contract settings and award.

## Company Workflow

1. Internal **[Role(s)]** will be responsible for awarding contracts via cost items: List your processes.
	1. Contracts should be awarded as lump sum versus with broken down SoVs in the following circumstances: List your processes.
		1. If Cost Codes are being tracked, they may be applied against the contract at this point.
	2. Awarded contracts will include monthly invoice submission reminder emails per the following: List your processes.
	3. Retainage will be switched on under the following circumstances: List your processes.
	4. The following documents must be attached alongside an awarded contract: List your processes.
2. Internal **[Role(s)]** will be responsible for sharing fully awarded contracts: List your processes any exceptions.
	1. At this point, **[Role(s)]** will share the contract with the following members of the vendor organization: List your processes.
	2. Once awarded, a default PDF contract is generated and may be accessed in the kebab menu.
		1. NOTE: This output requires that a feature flag be switched on by the Procore Customer Success team. Custom Solutions can be contacted if you need it to be changed.
	3. **[Role(s)]** will be responsible for adding any additional users that will need to be notified of contract portal activity, including invoice and change order submissions and messaging: List your processes.
3. Internal **[Role(s)]** will be responsible for approving contracts under these circumstances: List your process (this process must follow the same workflow as bidding)

#

# Portfolio Financials: Change Order Management

## Tool Location in Procore

Project Overview Page - **Cost Item Action: Add Contract** ([User Guide](https://intercom.help/honestbuildings/en/articles/2372411-change-orders-101))

## Things to Consider

* [**BEST PRACTICE**] The submission of change orders is recommended to be delegated to vendors.
* [**BEST PRACTICE**] Change order cost breakdown is auto-toggled on. This feature allows users to submit change orders directly against existing SoV items in the contract and provides greater reporting capabilities.

## Company Workflow

1. **[Role(s)]** will be responsible for submitting change orders: List your processes.
	1. The following documentation must be submitted alongside a change order: List your processes.
	2. **[Role(s)]** should use change order breakdowns under the following circumstances: List your processes.
	3. **[Role(s)]** should use lump sum change orders under the following circumstances: List your processes.
2. Internal **[Role(s)]** will be responsible for approving/rejecting change orders, or through approval workflows if change orders approvals are active: List your processes.
3. Internal **[Role(s)]** will be responsible for managing revision requests on change orders: List your processes.

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# Portfolio Financials: Invoice Management

## Tool Location in Procore

Project Overview Page - **Contract Room: Invoices Tab** ([User Guide](https://intercom.help/honestbuildings/en/articles/2372409-invoicing-101))

## Things to Consider

* [**BEST PRACTICE**] The submission of invoices is recommended to be delegated to vendors.
* [**BEST PRACTICE**] Speak to your IM or CSM about requiring permits/statutory declarations to be attached to invoices.
* [**BEST PRACTICE**] If your organization has opted into an ERP Integration, speak to your IM or CSM about configuring a Send to Accounts Payable workflow.

## Company Workflow

1. **[Role(s)]** will be responsible for submitting invoices: List your processes.
	1. The following documentation must be attached to each submitted invoice: List your processes.
2. Internal **[Role(s)]** will be responsible for approving/rejecting invoices, or through approval workflows if invoice approvals are active: List your processes.
3. Internal **[Role(s)]** will be responsible for managing revision requests on invoices: List your processes.
4. Internal **[Role(s)]** will be responsible for managing retainage release through the following procedures: List your processes.

#

# Portfolio Financials: Reporting

## Tool Location in Procore

Project Overview Page - **Dashboard: Reporting Tab** ([User Guide](https://intercom.help/honestbuildings/en/articles/2263032-reporting-101))

## Things to Consider

* [**BEST PRACTICE**] Reports that must be pulled on a regular cadence may be saved in Custom Reporting, Project Comparison, and Project Cost Reporting.
* [**BEST PRACTICE**] Before choosing your columns in Custom Reporting, consider applying a grouping in order to more effectively organize your report.

## Company Workflow

1. **Custom Reporting: [Role(s)]** will be responsible for creating and tracking custom reports. The priority use case for each report type are outlined below:
	1. Project: List your processes.
	2. Cost Item: List your processes.
	3. Cost Item Detail: List your processes.
	4. Invoice: List your processes.
	5. Approvals (Company Admin Only): List your processes.
2. **Project Status Report:** **[Role(s)]** will be responsible for exporting the PDF project status report under the following circumstances: List your processes.
3. **Project Comparison: [Role(s)]** will be responsible for grouping historical projects to develop anticipated cost reports: List your processes.
4. **Project Cost Reporting: [Role(s)]** will be responsible for configuring and tracking custom project cost reports.
	1. **[Role(s)]** will be responsible for developing standard Project Cost Reports. NOTE: Only company admins may configure these reporting templates.

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# Capital Planning

Centralized capital planning & cash flow forecasting tools for reporting to internal and/or external stakeholders.

## Tool Location in Procore

Project Overview Page - **Dashboard: Planning** ([User Guide](https://intercom.help/honestbuildings/en/articles/3270188-capital-planning-101))

## Tool Priority

Please identify if this is a high/low priority tool and if the Company will be utilizing this tool on initial Procore Rollout. Specify if this tool will be phased in later: List Priority

## Things to Consider

* [**BEST PRACTICE**] Consider creating all budgeted projects in Capital Planning at the beginning of the year, as each line item’s capital spend may be published downwards to the relevant projects’s budgets. This allows for mass budget publishing. NOTE: Only company admins have the ability to take this action.

## Company Workflow

1. **[Role(s)]** will be responsible for publishing official versions of the capital plan (either from a pre-existing unofficial version or a live plan): List your processes.
	1. **[Role(s)]** will be responsible for publishing project budgets from the capital plan. *NOTE: assumes budgeting will take place in capital planning, if budgets will be published at the project level, delete this step*.
2. **[Role(s)]** will be responsible for managing total capital spend on the following cadence: List your processes.
3. **[Role(s)]** will be responsible for publishing unofficial versions of the capital plan in the following circumstances: List your processes.

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# Cash Flow Forecasting

## Tool Location in Procore

Project Overview Page - **Project Page: Cash Flow Tab** ([User Guide](https://intercom.help/honestbuildings/en/articles/3270188-capital-planning-101))

## Tool Priority

Please identify if this is a high/low priority tool and if the Company will be utilizing this tool on initial Procore Rollout. Specify if this tool will be phased in later: List Priority

## Things to Consider

* [**BEST PRACTICE**] Cash flows can be published upwards to the capital plan. *NOTE:* this will override the live capital plan.
* [**BEST PRACTICE**] Cash flows are generally updated on a quarterly or monthly basis.

## Company Workflow

1. Internal **[Role(s)]** will be responsible for managing a project’s cash flow: List your processes
	1. The spreading tool should be used under the following circumstances: List your processes.
		1. Straight Line
		2. Bell Curve
		3. Front Loaded Curve
		4. Back Loaded Curve
2. Internal **[Role(s)]** will update a project’s cash flow at the following cadence: List your processes.

#

# Project Forms

Upload, access, and fill out fillable PDFs. Project collaborators can then immediately access these forms directly from their mobile device. All form templates and filled out forms are stored in Procore.

## Tool Location in Procore

Project Level Project Management Tool - **Forms** ([User Guide](https://support.procore.com/products/online/user-guide/project-level/forms))

## Tool Priority

Please Identify if this is a high/low priority tool and if the Company will be utilizing this tool on initial Procore Rollout. Specify if this tool will be phased in later: List Priority

## Things to Consider

* [**BEST PRACTICE**] If robust reporting is required/needed, use Inspections instead.

## Company Workflow

1. **[Role(s)]** is responsible for creating fillable PDFs outside of Procore.
2. Internal **[Role(s)]** is responsible for uploading fillable forms within the Company Admin Tool.
3. List the type of Forms your company will be utilizing on a daily, weekly, monthly basis: List your process
4. **[Role(s)]** is responsible for filling out Forms from the Procore mobile Application.

#

# Project Inspections

​​Create comprehensive checklists to capture all of the requirements associated with the different type of inspections that occur during the lifecycle of a construction project. Create a unique template for each inspection/checklist or choose to modify/add to a company template on a project-by-project basis. Templates can be managed in the Inspections (Company Level) tool.

## Tool Location in Procore

Project Level Project Management Tool - **Inspections** ([User Guide](https://support.procore.com/products/online/user-guide/project-level/inspections))

## Things to Consider

**Permissions:**

Internal Team has **[Permission Level]**

Contractor(s) have **[Permission Level]**

Consultants have **[Permission Level]**

Vendors have **[Permission Level]**

## Tool Priority

Please Identify if this is a high/low priority tool and if the Company will be utilizing this tool on initial Procore Rollout. Specify if this tool will be phased in later: List Priority

## Company Workflow

1. [**Internal [Role(s)] who’s managing Inspection Field sets.**](#_mwbm0pyjkzjs)
2. Internal **[Role(s)]** will add additional Company Level Templates to the project if necessary.
* **[Best Practice]** Add all Standard Inspection Templates to Standard Project Template to streamline inspection process across all jobs
1. Internal **[Role(s)]** will create Project specific templates if necessary.
2. **[Role(s)]** is responsible for making sure the correct Inspection Templates are added to the project Inspection configurations.
3. **[Role(s)]** is responsible for creating the Inspection on the Procore mobile application.
	1. Indicate if each inspection line should include comments, photos, and an observation for failed inspection items: List your process
* **[Best Practice]**  Enable Observation setting that automatically prompts users tocreate Observations upon inspection item failure.
1. **[Role(s)]** needs to be added to the signature field in order to sign off on Inspections.
2. **[Role(s)]** is responsible for managing all project inspections and checking for accuracy with information including inspection status and linked items.
3. **[Role(s)]** is responsible for making sure all observation items tied to an inspection are closed before closing the inspection.

#

# Project Observations

Have complete oversight of project issues list. Assign issues downstream to Contractors/Consultants/Suppliers/Vendors. Unlike the Punch List tool, Observations is designed to be used at any phase in the project lifecycle.

## Tool Location in Procore

Project Level Project Management Tool - **Observations** ([User Guide](https://support.procore.com/products/online/user-guide/project-level/observations))

## Tool Priority

Please Identify if this is a high/low priority tool and if the Company will be utilizing this tool on initial Procore Rollout. Specify if this tool will be phased in later: List Priority

## Things to Consider

**Permissions:**

Internal Team has **[Permission Level]**

Contractor(s) have [Permission Level]

Consultants have **[Permission Level]**

Vendors have **[Permission Level]**

## Company Workflow

1. [**Internal [Role(s)] who’s managing Observation Field sets.**](#_mwbm0pyjkzjs)
2. Indicate whether Observation templates will be used. [List process]
	1. Internal **[Role(s)]** will manage and identify the responsible party for Project level observation templates if applicable.
3. **[Role(s)]** will create project observation in Procore.
	1. Indicate whether an observation item will be created inspection item failure: List your process
		* **[Best Practice]**  Enable Observation setting that automatically prompts users tocreate Observations upon inspection item failure.
	2. Take photos to provide clarity.
4. **[Role(s)]** is responsible for triggering the digestive emails to observation assignees.
5. **[Role(s)]** is responsible for managing the project observation before resolving completed observation items.
6. Indicate if the Observation Assignee must attach a photo to their response/submit: List your process

# Project Incidents

Digitally capture and manage incidents easily and accurately. Manage risk, identify trends, and harness valuable data to better understand how to prevent unfortunate incidents in the future.

## Tool Location in Procore

Project Level Project Management Tool - **Incidents** ([User Guide](https://support.procore.com/products/online/user-guide/project-level/incidents))

## Tool Priority

Please Identify if this is a high/low priority tool and if the Company will be utilizing this tool on initial Procore Rollout. Specify if this tool will be phased in later: List Priority

## Things to Consider

**Permissions:**

Internal Team has **[Permission Level]**

Contractor(s) have [Permission Level]

Consultants have **[Permission Level]**

Vendors have **[Permission Level]**

## Company Workflow

1. [**Internal [Role(s)] who’s managing Incidents Fieldsets/Alerts/Severity Settings.**](#_mwbm0pyjkzjs)
2. **[Role(s)]** is responsible for creating project incidents in Procore.
	1. **[Role(s)]** should be added to the distribution list of every incident.
	2. **[Role(s)]** is responsible for adding the above users to the default distribution in the project incident configurations.
3. **[Role(s)]** is responsible for adding incident records.
4. **[Role(s)]** is responsible for adding witness statements.

#

# Project Punch List

Allows for complete oversight of project Punch List. Manage accountability due dates, and track current status until completion.

## Tool Location in Procore

Project Level Project Management Tool - **Punch List** ([User Guide](https://support.procore.com/products/online/user-guide/project-level/punch-list))

## Tool Priority

Please Identify if this is a high/low priority tool and if the Company will be utilizing this tool on initial Procore Rollout. Specify if this tool will be phased in later: List Priority

## Things to Consider

**Permissions:**

Internal Team has **[Permission Level]**

Contractor(s) have [Permission Level]

Consultants have **[Permission Level]**

Vendors have **[Permission Level]**

## Company Workflow

1. [**Internal [Role(s)] who’s managing Punch List Fieldsets.**](#_mwbm0pyjkzjs)
2. Indicate whether Punch List Templates will be used. **[List process]**
	1. Internal **[Role(s)]** will manage and identify the responsible party for Project level Punch templates if applicable.
3. **[Role(s)]** is responsible for creating project punch items in the Procore mobile application.
	1. Can be created from a template or without a template
	2. Take photos to provide clarity.
4. **Internal [Role(s)]** will set up Default users in Punch workflow
5. If Punch Item creator is a Standard User then, **[Role(s)]** is the project punch item manager.
6. If Punch Item creator is a Standard User then,**[Role(s)]** is the project punch item final approver.
7. **[Role(s)]** is responsible for triggering the digestive emails to punch item assignees.
8. Indicate if the Punch Item Assignee must attach a photo to their response/submit: List your process

# Additional Tips

# Using Procore Effectively and Efficiently

Procore is a tool that we will utilize each and every day in managing our projects. All internal and external collaborators should be using our Procore Account efficiently and effectively. Please read the below sections:

## Project Dashboard

Collaborators on the Project Directory will have access to the project Dashboard to stay up to speed with project related items. Use this dashboard each day from field or office to stay accountable.



##

## My Open Items

Collaborators and Key Project Players will be assigned items throughout the lifespan of the project. In order to stay on top of items before the due date, use the ‘My Open Items’ Section on the Project Home Dashboard to see all items requiring your attention. You can view all your open items within all projects in a specific Procore account by navigating to the Company Portfolio and clicking the ‘My Open Items’ Tab.



## My Tasks (Portfolio Financials)

The My Tasks page organizes all invoices, bids, contracts, and change orders that are pending your approval in Portfolio Financials. Click on the pending item to navigate to and review the invoice, bid, contract, budget, or change order approval. The My Tasks page may be accessed through the check-mark in the upper right-hand corner of the platform.



## Managing Tool Items - Creating and Updating

Most Project Tools in Procore have a central log displaying tool items and critical information. When managing different tool items, make sure to input as much information as possible and attach photos or drawings when necessary. Due dates should always be updated to maintain accuracy on the project dashboard and project reports.



