



# Cost Management Enterprise Implementation

Your dedicated Project Team partners with you to implement Procore tools that improve financial visibility, streamline contracting and invoicing, and control budget.

## SCOPE OF WORK

- Project Coordination Services:** Project Coordinator will manage execution, including project planning, resource management, deliverable approvals, and budget/schedule oversight.
- Account Configuration:** Foundational configuration of in-scope tools, including project templates, company settings, workflows, permissions, and template builds.
- Discovery:** Procore-led discovery to identify business outcomes, processes, and strategy.
- Process & Configuration Advisement:** Guidance on best practices, configuration settings, and permissions aligned to desired processes and outcomes.
- Configuration Training:** Overview of Procore's configuration architecture to support long-term platform administration.
- Analytics Setup:** Activation of the default Procore Analytics Reports and Dashboard, and training on navigating the tool.

## DELIVERABLES

- Implementation Project Plan:** A customized schedule that guides through the services engagement.
- Configuration Workbook:** Document outlining agreed-upon configuration changes to the Procore platform.
- Discovery Summary:** PDF summarizing key discovery insights, including current and future state, to inform prioritization.
- Validation Script:** Procore-provided testing script to support user validation of in-scope tools.
- Project Closeout Documentation:** Summary of project performance, lessons learned, and recommendations.

PROCORE IMPLEMENTATION: IN-SCOPE TOOLS	
✓	Core Platform
✓	Prime Contracts
✓	Commitments (up to 2 workflows)
✓	Budget (up to 3 budget views and 1 WBS import)
✓	Change Events (up to 2 workflows and 1 view)
✓	Change Orders
✓	Invoicing (up to 2 workflows)
✓	Direct Costs
✓	Reports (up to 3 reports)
✓	Estimating for Change Management
✓	Analytics for Cost Management

*A program of self-guided learning and Procore-led implementation accelerates your project teams' Procore adoption.*

### ASSUMPTIONS

(1) The Customer will be responsible for loading all data into the Procore system via the Procore user interface or Procore Imports tool. (2) The Customer will be responsible for configuring the Procore account outside of the in-scope configurations. (3) The Customer will be responsible for creating and updating their Procore Standard Operating Procedures. (4) All Services will be delivered in English. (5) The Customer is an active participant in the implementation for the duration of the process in order to facilitate the delivery of the Professional Services described herein. (6) Customer personnel must be available as needed to complete tasks assigned to them. If Customer resources are not available as needed, or there are organizational changes, it will negatively impact the delivery of services included in this package. (7) The project is a joint effort between Procore and Customer.

### EXCLUSIONS

The following are considered out of scope for the Professional Services described herein, unless explicitly stated: (1) Integration with third-party applications, tools, or systems not specifically outlined; (2) Data Migration, including data cleaning and data mapping; (3) Onsite Services; (4) Change management activities, including organization transition; (5) User Acceptance Testing; (6) System Administration