



Cost Management 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.

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.
- Contract Customization:** One configured Cost Management PDF export template and one PDF mapping document.
- 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
✓	Change Orders (up to 2 workflows and 1 view)
✓	Invoicing (up to 2 workflows)
✓	Direct Costs
✓	Reports (up to 3 reports)

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



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A successful implementation depends on engagement from your team participate in consultations, validate configurations, and complete self-guided training. Procore's Project Team will guide you through key milestones and deliverables.

COST MANAGEMENT	
PROCORE IMPLEMENTATION: SAMPLE VALIDATION SCRIPT	
✓	Budget
✓	General Settings
✓	Import or Create a Budget
✓	Review or Create a Custom Budget View
	Create a Budget Snapshot
✓	Create a Budget Change
✓	Prime Contract
✓	General Settings
✓	Create a Prime Contract with an SOV
	Email a Prime Contract
✓	Approve a Prime Contract
✓	Commitments & Direct Costs
✓	General Settings
✓	Create a Subcontract
✓	Create a Direct Cost
✓	Email a Subcontract
✓	Change Events & Change Orders
✓	General Settings
✓	Create a Change Event

COST MANAGEMENT	
PROCORE IMPLEMENTATION: SAMPLE CONFIGURATION WORKBOOK	
DEFAULT CONFIGURATION	UPDATED CONFIGURATION
Prime Contract	
Default Fieldset	Removed Fields: - Field 1 - Field 2 - Field 3 Added Custom Fields & Required: - Field 1
Amount-Based vs. Unit/Quantity Based?	Amount Based
Level of Detail on Owner Invoices	Line Item
Allow SOV edits after approval?	Disabled
Detailed Budget Code allocation or high-level summary?	Disabled
Commitments	
Commitment Types Enabled	Subcontract AND Purchase Order (PO)
# of Tiers for Change Orders?	2 Tiers (CPCO > CCO)
Enable Retainage on Stored Materials?	–
Allow Subcontractors to overbill?	Disabled
Will Subcontractors be “Invited to Bill” or an open monthly window?	Invited to Bill
Default Fieldset	Removed Fields: - Field 1 - Field 2
Change Events	

8-WEEK SAMPLE TIMELINE

