Create a New Project

Objective

To add a new project to your company’s Procore account using the Portfolio tool’s Project Creation Assistant.

Background

The Project Creation Assistant gives you the ability to quickly create Procore projects and efficiently upload key project documents (e.g., project drawings and specifications).

Things to Consider

• **Required User Permission:**
  - A user account with Procore Administrator permission.
  - OR
  - An active user account in the Company Directory that has been granted the privilege to create new projects by a Procore Administrator. See Allow Users to Create New Projects.

• **Prerequisites:**
  - If your company is planning to use the Project level Bidding tool, complete the steps in Add Project Bid Types.
  - If your company is planning to organize its projects in the company's Programs tool, complete the steps in Add Programs.
  - If your company uses a classification system to organize your projects by type, complete the steps in Add a Custom Project Types.

• **If you have enabled the Company level ERP Integrations tool:**
  Do NOT use the steps in this article. Instead, refer the article for your integrated ERP system below:
  - Integration by Procore: Add a Procore Project to Viewpoint® Spectrum®
  - Integration by Ryvit: Add a Procore Project to Viewpoint® Vista™
  - Sage 100 Contractor®: Add a Procore Project to Sage 100 Contractor®
  - Sage 300 CRE®: Add a Procore Project to Sage 300 CRE®
  - QuickBooks®: Add a Procore Project to QuickBooks®

• **Limitations:**
  - A user with 'Admin' permissions to the Portfolio tool is NOT permitted to create new projects unless privileges have been granted as described above.
  - Procore projects cannot be deleted. However, you can change its status of Inactive. For instructions, see Change a Project's Status to Active or Inactive.
  - When your company's Procore account meets the limit defined by your account's Maximum # of Active
Projects, the Create Project button is automatically disabled.

- **Troubleshooting:**
  - If you are not able to create a new project, see [Why am I unable to create or activate Procore projects?](https://support.procore.com/products/online/user-guide/company-level/portfolio/tutorials/create-a-new-project)

## Steps

Use the Project Creation Assistant to add a new project. These are the steps:

1. **Launch the Project Creation Assistant**
2. **Add Project Details**
3. **Add and Remove Tools in the Project Toolbox**
4. **Add Project Cost Codes**
5. **Update Directory**
6. **Upload Drawings**
7. **Upload Specifications**
8. **Upload Schedule**

### Launch the Project Creation Assistant

1. Navigate to the company's Portfolio tool.
2. Click **Create Project**.

![Image of Project Creation Assistant](https://support.procore.com/products/online/user-guide/company-level/portfolio/tutorials/create-a-new-project)

This launches the Project Creation Assistant.

### Add Project Details

1. Make sure **Project Details** is selected.
2. Under **Project Information**, complete the following information as necessary:

*Note: An asterisk (*) below indicates a required field.*

- **Template.** Choose a project template from the list or choose 'Do Not Apply a Template'.
  
  **Notes:**
  - This field is only visible and available when the project templates feature is enabled on your company’s Procore account.
  - To select a template from the list, the desired project template must be active. See [Configure a Project Template](https://support.procore.com/products/online/user-guide/company-level/portfolio/tutorials/create-a-new-project).

- **Name***. Enter a name for the project. This is a required field.

- **Estimated Value***. Enter the anticipated project value upon completion. Enter a value to the nearest whole number. For example, if your project's estimated value is $18 million dollars, enter $18,000,000.00 in the box.

- **Estimated Start Date***. This represents the date that the project will start and also will be used to calculate construction volume.

- **Estimated End Date***. This represents the date that the project will start and also will be used to calculate construction volume.

- **Stage.** Select a project stage from the list. These selections are created with the company's Admin tool. See [Add Custom Project Stages to Your Company](https://support.procore.com/products/online/user-guide/company-level/portfolio/tutorials/create-a-new-project).

- **Type.** Select a project type from the drop-down list. These selections are created in the company's Admin tool. See [Add a Custom Project Type](https://support.procore.com/products/online/user-guide/company-level/portfolio/tutorials/create-a-new-project).

- **Project Number.** Enter a unique project ID or number to differentiate it from other company projects.

- **Square Feet.** Enter the project's square footage.

- **Store Number.** Enter the store number for the project. This field is only visible and available if the 'Include Store Number and Designated Market Area' setting is enabled in the 'Default Project Settings' section of the Company Admin tool.
- **Description.** Enter a brief project summary.

- **Active.** Click the toggle to the ON position to set the project to *Active*, or click the toggle to the OFF position to set the project to *Inactive*.

- **Logo.** Drag and drop an image or click the area to select an image file to upload as a logo for the project. The file should have dimensions of 200 x 70 pixels, must not exceed the 3MB maximum, and must be saved in the GIF, JPG, or PNG file format. To change this logo at a later time, see Update General Project Information.

- **Photo.** Drag and drop an image or click the area to select an image file to upload as the project photo. The file should have dimensions of 200 x 100 pixels, must not exceed the 3MB maximum, and must be saved in the GIF, JPG, or PNG file format. To change this photo at a later time, see Update General Project Information or Add a Project Photo.

3. Under **Project Location**, complete the following information as necessary:

    - **Country.** Select the country from the drop-down list.

    - **Timezone.** Choose the correct time zone for the project from the drop-down list. This time zone will determine time stamps on items in the project.

    - **Address.** Enter the address for the project's job site.

      **Notes:**
      
      - If your company is using the Procore+ Sage 300 CRE integration, do not enter commas (,) in the Project Address field.
      
      - Procore’s ‘Project Address’ and ‘Zip’ fields are integrated with third-party services:
        
        - Dark Sky. This service permits the display of ‘Project Weather’ information on the Procore project’s Home page, as well as under the ‘Observed Weather Conditions’ information in the project’s Daily Log Tool.
        
        - Procore also uses a third-party service to automatically determine the County name. Since this is auto-determined, there is no data-entry for County in the Create New Project page. To change the County value, see Update General Project Information.
        
        - If you experience any issues with a third-party weather service, see Why isn’t my project weather working? and Why are the weather conditions not showing on my Daily Log weather log?

    - **City.** Enter the full city name for the project.

      **Note:** Do not abbreviate the city name.

    - **State.** Select the state for the project from the drop-down list.
 ◦ **Zip.** Enter the ZIP/postal code for the project.

 ◦ **Phone.** Enter in the main contact phone number for the job site. Team members will be able to see this phone number.

 ◦ **Fax.** Enter the onsite fax number (if available). This gives team members the ability to see and use the project's fax number when needed.

 ◦ **Designated Market Area.** Enter the designated market area for the project.

   *Note:* This field is only visible and available if the 'Include Store Number and Designated Market Area' setting is enabled in the ‘Defaults’ section of the Company Admin tool.

4. **Under Advanced,** complete the following information as necessary:

   ◦ **Office.** Choose the office that is managing this project. These selections are created in the company's Admin tool. See [Add an Office Location](#).

   ◦ **Departments.** Select one or more departments who have responsibility for the project. These selections are created with the company's Admin tool. See [Custom Company Projects](#).

   *Note:* These departments appear in the Timecard and Directory tool, and may also appear in other Procore tools depending on your company's specific configuration.

   ◦ **Program.** Select the program to classify your project under. These selections are created with the company's Admin tool. See [Create Company Programs](#).

   *Note:* You can view your projects by program using the Programs tool.

   ◦ **Flag.** Select a color for the project flag from the drop-down list. The system's default color selections are: RED, YELLOW, and GREEN. This allows you to visually organize your projects (e.g., you might want to flag internal projects as RED and commercial projects as GREEN).

   ◦ **Region.** Select the region you want to classify your project into. These selections are created with the company's Admin tool. See [Add Project Regions](#).

   *Note:* You can view projects by region in the Portfolio tool.

   ◦ **Bid Type.** Select the bid type from the list. These selections are created with the company's Admin tool. See [Add a Custom Bid Type](#).

   ◦ **Owner Type.** Select the owner type from the drop-down list. These selections are created in the company's Admin tool. See [Add a Custom Owner Type](#).
- **Parent Project.** Select the name of the parent project in Procore from the drop-down list. In Procore, a *parent job* is a Procore project that has been designated as the 'parent' project for one or more related project(s) in Procore’s Portfolio tool. To learn more, see *What's the difference between a job, a parent job, and a sub job?*

- **Warranty Start Date.** Select the start date for the construction contract warranty.

- **Warranty End Date.** Select the end date for the construction contract warranty.

- **Test Project:** Mark the checkbox if this project is being used for learning purposes only. It is important to note that marking a project as a ‘Test Project’ does not exclude it from your account’s Project Cap. However, it does exclude it from your Construction Volume. See *How is Construction Volume tracked in Procore?*

  *Note:* Coming Soon Projects marked as ‘Test Projects’:
  - Will be excluded from Company Reports and Dashboards
  - Will have a ‘Test’ indicator when viewed within the Company level Portfolio tool
  - Will be able to be filtered within the Company level Portfolio tool

5. Click **Create Project.**

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### Add and Remove Tools in the Project Toolbox

Tools selected on this page will appear in the project's tools menu, while tools that are not selected will not appear in the tools menu, and cannot be used.

*Note:* If you want to change which tools are available later, you can do so by navigating to the project's Admin tool. See *Add and Remove Tools on a Project.*

1. Make sure **Tools** is highlighted.

   *Important!* If the **Tools** link does NOT appear in the Project Creation Assistant, it is because the project template that you applied to your new project already determined the project's tools.

2. Add and remove tools for the project as follows:

   - **To add a tool individually:** Mark the checkbox next to box that corresponds to desired tool.
   - **To add all available tools within a category:** Mark the checkbox next to the category name.
   - **OR**
   - **To add all available tools from all categories:** Mark the checkbox next to **Select All.**

   *Note:* Clicking the checkbox again will deselect all tools.

   - **To remove a tool:** Clear the checkbox for that tool.

3. If you want to rearrange the order of tools on the project's toolbar for all users:

   1. Hover over the **grip** ?? icon next to the tool you want to move.
   2. Use a drag-and-drop operation to move the tool to a new position in the product category.
4. Click **Select Tools**.
   
   *Note:* The system displays a GREEN banner to confirm your settings were saved.

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**Add Project Cost Codes**

*Note:* This page is only available in this module if your Procore account has ERP integrations enabled. Cost codes can be managed for a project in the Admin tool. Add and Edit Project Cost Codes.

### 1. Make sure **Cost Code** is highlighted.

*Notes:*
- For information about Procore's default cost codes, see [What are Procore's default cost codes?](https://support.procore.com/products/online/user-guide/company-level/portfolio/tutorials/create-a-new-project)
- If your company account has enabled the Company level ERP Integrations tool, you will have the option to select the cost code list for your [integrated ERP system](https://support.procore.com/products/online/user-guide/company-level/portfolio/tutorials/create-a-new-project) from a **Source** drop-down list.
- To learn about cost codes for your specific integrated ERP system, see [Configure Cost Code Preferences for ERP Integrations](https://support.procore.com/products/online/user-guide/company-level/portfolio/tutorials/create-a-new-project).
- If your company account has enabled the Procore + Viewpoint® Spectrum®, you must use the Standard Cost Code List. See [Update Project Cost Codes for Export to Viewpoint Vista](https://support.procore.com/products/online/user-guide/company-level/portfolio/tutorials/create-a-new-project).

### 2. Choose from these options (A) or (B):

**A.** If your Procore company account is NOT configured to work with an [integrated ERP system](https://support.procore.com/products/online/user-guide/company-level/portfolio/tutorials/create-a-new-project), you will see the **Standard Cost Code List** page (pictured above). Choose from these options:

- To copy only selected codes from Procore's standard cost code list:
  1. Expand the desired division folder(s).
  2. Highlight the desired cost codes.
  3. Click **Copy Selected Codes**.
     *Note:* You can also add, update, and delete cost codes in the Project Cost Codes list. For step-by-step instructions, see [Add and Edit Project Cost Codes](https://support.procore.com/products/online/user-guide/company-level/portfolio/tutorials/create-a-new-project).
- To copy all of the codes from Procore's standard cost code list:
  1. Click **Copy All Codes**.
     The system reveals the following confirmation message: "Once you add this cost code, the source list cannot be changed."
  2. Click **OK** to acknowledge the confirmation message.
     This moves all the codes in the **Standard Cost Code List** to the **Project Cost Codes** list.
B. If your Procore account is configured to work with an integrated ERP system, you will see the Source drop-down list. Complete the following:

- Select Sage 300 CRE® Standard Cost Code List.
  
  Note: You will only have the ability to select this option if your company has enabled the Procore + Sage 300 CRE® integration. This is a required setting for the Procore + Sage 300 CRE® integration.

3. Click Next.
   
   If your company has enabled the Procore + Sage 300 CRE® integration, the system reveals the Cost Codes & Cost Types page.

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Assign Default Cost Types to Cost Codes

Note: This page is only available in this module if your Procore account has ERP integrations enabled.

1. Make sure Cost Code is highlighted.

2. For each cost code listed, mark one (1) or more checkboxes to assign each code to one (1) or more cost type.

   Important!

   - Projects using Integration by Ryvit Cost Codes will use the Integration by Ryvit Standard Cost Types. Modifications to this cost type list must be done in Integration by Ryvit.

3. Click Continue.
   
   Your cost type assignments are automatically saved and Procore confirms that it has created your new project.

4. Click Continue Project Setup.
Update Directory

1. Make sure **Directory** is highlighted.

2. Add contacts and companies from the Company Directory to your Project Directory as follows:
   - *If your project is based on an existing project template*, you can add all of the companies and employees for those companies by clicking **Select All** in the drop-down menu.
   - *To add a company from Procore’s Company Directory and all of that company's employees*, begin typing the company name. When the system finds the appropriate match, select the company from the list. This adds both the company and people to the Project Directory.
   - *To add a person*, begin typing the person's name. When the system finds the appropriate match, select that person from the list:
     - **Notes:**
       - If you want to remove a company or a person, click the delete icon across from the company or person.
       - If you want to remove all company or people, click **Clear All** in the drop-down menu.

3. For each person that you have selected to add, complete the following:
   - **Permission Template**. Select the desired permission template from the list or choose ‘Apply a Template Later.’
     - **Important!** This is a required setting for all of the users that you intend to add. To learn how the selections in this list are created, see [Manage Permission Templates](https://support.procore.com/products/online/user-guide/company-level/portfolio/tutorials/create-a-new-project).
   - **Project Role**. Select the project role for the user. The selection you make here will list the person for each selected role on the project's Home page. To learn how the selections in this list are created, see [Add a Custom Project Role](https://support.procore.com/products/online/user-guide/company-level/portfolio/tutorials/create-a-new-project).

4. Click **Next**.
   A GREEN banner appears at the top of the page to confirm the number of companies and people added.

Upload Drawings

1. Make sure **Drawings** is highlighted.

2. Complete the following:
To learn how to format drawings before uploading them to a project, see How can I improve the accuracy of OCR on my drawings?

To skip this step and upload your project’s drawing(s) at a later time, click Skip. When you are ready to upload your drawings, see Upload Drawings.

- Attach File(s). Click this button to choose from these options: Upload a file from your computer, Select a file from Procore, or if you have enabled the Box integration, Select a file from Box.
- OR
- Drag and Drop File(s). Use a drag-and-drop operation to move files from your computer or network to this area on the page.
- Set Name. Enter a name for the drawing set.
- Set Date. Select a date for the drawing set using the calendar control.
- Default Drawing Date. Select a date for the drawing(s) using the calendar control.
- Default Received Date. Select the received date for the drawing(s) using the calendar control.

3. Click Next.
The system processes the drawings in the background.

Note: You do NOT need to wait for the upload to complete. When finished, the system sends you an automated email notification with the subject line, “Drawing Upload Complete.” To learn how to review and publish your drawings, see Review and Confirm Drawings and then Publish Drawings.

Upload Specifications

1. Make sure Specifications is highlighted.

Notes:
- If you want to skip this step and upload a specification later, click Skip. This closes the Project Creation Assistant.
- When you are ready to upload your specifications at a later time, see Upload Specifications.

2. Complete the following:
Notes:

◦ To learn how to format specifications before uploading them to a project, see [How can I improve the accuracy of Specification Section Identification?](#)

  - **Attach File(s).** Click this button to choose from these options: *Upload a file from your computer*, *Select a file from Procore*, or if you have enabled the Box integration, *Select a file from Box*.

  OR

  - **Drag and Drop File(s).** Use a drag-and-drop operation to move files from your computer or network to this area on the page.

  - **Set Name.** Enter a name for the set.

  - **Set Date.** Select a date for the set using the calendar control.

  - **Default Issued Date.** Select a date for the file(s) using the calendar control.

  - **Default Received Date.** Select the received date for the file(s) using the calendar control.

3. Click **Next**.

   The system processes the specification upload.

   *Note: You do NOT need to wait for the upload to complete. When finished, the system sends you an automated email notification with the subject line, "Specification Upload Complete." To learn how to review and publish your specifications, see [Review and Publish Specifications](#).*

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**Upload Schedule**

1. Make sure **Schedule** highlighted.

   *Notes:*

   ◦ If you want to skip this step and upload a schedule later, click **Skip**. This closes the Project Creation Assistant.

   ◦ When you are ready to upload your schedule at a later time, see [Upload a Project Schedule File to Procore's Web Application](#).

2. Complete the following:
3. Click **Attach File(s)**. Then navigate to the schedule file on your computer or network. Then click **Open**.

**Notes:**

- The Project Creation Assistant only supports file upload via your web browser. It does not currently support file uploads stored in the Project level Documents tool.
- If you want to store a schedule file in the Documents tool and then upload it, see "File Upload Via Procore Documents" in the [Upload a Project Schedule File to Procore's Web Application](https://support.procore.com/products/online/user-guide/company-level/portfolio/tutorials/create-a-new-project).
- You can also upload a schedule file using Procore Drive. For details, see [Schedule](https://support.procore.com/products/online/user-guide/company-level/portfolio/tutorials/create-a-new-project) in the Procore Drive User Guide.

4. Click **Next**.

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**See Also**

- [Update General Project Information](https://support.procore.com/products/online/user-guide/company-level/portfolio/tutorials/create-a-new-project)
- [Manage Permission Templates](https://support.procore.com/products/online/user-guide/company-level/portfolio/tutorials/create-a-new-project)
- [Add a Custom Project Role](https://support.procore.com/products/online/user-guide/company-level/portfolio/tutorials/create-a-new-project)
- [Allow Users to Create New Projects](https://support.procore.com/products/online/user-guide/company-level/portfolio/tutorials/create-a-new-project)