Import Two-Level Cost Codes to the Company Admin Tool

Click here to read an important note about Data Imports

**IMPORTANT!** In order to protect the integrity of your company’s data, Procore Employees are restricted from modifying the data that clients submit in all Procore Import Templates. This restriction applies to all data modifications, including correcting typographical errors. If Procore determines that errors are present in any Procore Import Template that you submit to Procore, it will be returned to you for correction. Please note that the import process may take up to 72 hours to process.

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**Objective**

To submit a request to import unique cost codes to the Company Admin tool.

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**Background**

If your company or project requires a unique cost code structure, you can import custom cost codes into either the Company level or Project level Admin tool. Some companies design their cost code structure to align with the CSI MasterFormat. Other companies decide to implement a cost code structure that is unique to their industry, organization, or project environment. Regardless of the structure, you can submit a request to have a Procore representative import the custom cost codes for you or you can expedite the process and perform your own cost codes import using the Procore Imports app.

*Note:* The Company and Project Level Admin tools include a 17 Division Cost Code Structure that aligns to the CSI MasterFormat. See What are Procore's Default Cost Codes?

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**Things to Consider**

- **Required User Permissions:**
  - 'Admin' level permissions to the company's Admin tool to request cost code imports at the company level.
  - 'Admin' level permissions to the project's Admin tool to request cost codes imports at the project level.

- **Prerequisites:**
  - A two-level cost code structure based on the CSI MasterFormat. The first level of the code structure consists of a Division Number (e.g., 01 General Requirements, 02 Site Construction, etc.) and the second level consists of cost code numbers and titles (e.g., 000 Purpose, 002 Instructions, 010 Project Manager, etc.).
  - **Important!** If your company's cost code structure has three (3) levels or more, see Import Cost Codes to Procore.
• **CSV File Requirements:**
  ◦ For general formatting considerations, see [How do I prepare my data for import into Procore?](https://support.procore.com/products/online/user-guide/company-level/admin/tutorials/import-custom-cost-codes-to-a-company)
  ◦ The XLSX file must be formatted as a table.
  ◦ The first line of the table must include the *header*, which defines the fields in the table.
    - **The table must contain the following header row:** Division, Division 1, Division 2, Division N (where N= subsequent cost code levels such as Division 3, Division 4, etc.), Cost Code, and Description.
    - **The table must contain the following column headers:** Division, Cost Code, and Description.
      Below are the row requirements:
      ▪ Every unique Cost Code must be represented in its own row. The row must contain a Division Number, a Cost Code, and a Description value.
      ▪ Every new Division must be represented in its own row. The row must contain a Division and Description value. Always leave the Cost Code Cell blank.

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**Steps**

1. Download the two-level cost code template: [import-cost-codes.xlsx](https://support.procore.com/products/online/user-guide/company-level/admin/tutorials/import-custom-cost-codes-to-a-company)
2. Complete the data entry as follows:
   - **To create a new Division:**
     - **Division.** Enter a value in the Division (e.g., type 01).
     - **Cost Code.** Always leave this cell blank to create a new division.
     - **Description.** Type the desired label for the second level in the Description cell (e.g., General Requirements).
       **Note:** The ‘Example’ column automatically updates to show you what the Division will look like when displayed in Procore. You do NOT need to enter data in this column.
       **Example: How to Create a Division**

   ![Division Example](https://example.com/division.png)

   - **LEAVE BLANK**

   - **To create a new Cost Code:**
     - **Division.** Repeat the Division entry. This ensures the cost code is contained within the Level 1 folder (e.g., 01 General Requirements) in Procore.
     - **Cost Code.** Enter the desired code (e.g., 10) in the Cost Code cell.
     - **Description.** Type the desired label for the second level in the Description cell (e.g., Project Manager).
       **Note:** The ‘Example’ column automatically updates to show you what the Division will look like when displayed in Procore. You do NOT need to enter data in this column.
       **Example: How to Create a Cost Code in a Division**

![Cost Code Example](https://example.com/cost-code.png)
3. Repeat the steps above for every division (or divisions) and code in your company’s cost code list. The illustration below shows you a sample of a properly formatted XLSX file.

![Sample XLSX File](https://support.procore.com/products/online/user-guide/company-level/admin/tutorials/import-custom-cost-codes-to-a-company)


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### Validate the Cost Code Import

1. Navigate to the company's or project's Admin tool.

2. In the right pane, click the Cost Codes link.

3. In the page that appears, validate that the imported cost code structure displays as expected. As shown in the illustrations below, cost codes imported at the company level appear in the left side of the page in the Admin tool, while cost codes imported at the project level appear in the right side of the page.

   **Company Level Admin Tool: After a Cost Code Import**
Edit Standard Cost Code List

Project Level Admin Tool: After a Cost Code Import

See Also

- Import Cost Codes to Procore
- Request a Cost Code Import