User Guide

Portfolio Financials and Capital Planning

This guide provides an overview of product features and related technologies for the Portfolio Financials and Capital Planning products in Procore. In addition, it contains recommendations on best practices, tutorials for getting started, and troubleshooting information for common situations.

Click a topic name below to view the relevant tutorials, videos, FAQs, and permissions:

- Account and Company Settings
- Approval Workflows
- Bid Room
- Contract Room
- Cost Allocations
- Cost Tracker
- Dashboard
- Documents
- Milestones
- Our Team and Vendors
- Planning
- Project Page
- Project Team
- Reporting
- Resources for Vendors

To see a list of all FAQs related to Portfolio Financials and Capital Planning, see FAQ.

Note: If you are looking for resources related to other tools in the Procore web application, see Procore User Guide.