

How to create a new project in Procore

This guide walks you through how to create a new project in Procore, from reviewing your company's best practices checklist to logging in, filling out the required project setup fields, and confirming that your new project has been created successfully.

Prerequisites

Before you create a new project in Procore, make sure you have the following:

- Access to your company's **Procore Best Practices Checklist**, typically distributed via email. This checklist outlines tasks, responsible roles, and best practice notes for every stage of a project.
- An active Procore account with a valid email address and password.
- The project details you'll need to enter, including the project name, number, description, address, and stage, as defined by your organization's naming conventions.

Review the Procore Best Practices Checklist

Before creating a project, review your organization's checklist to understand what's required at each stage.

The checklist is a structured document organized into columns for Task, Project Roles (DPM, PM, S, C), and Best Practice. Blue bars indicate milestones—key events that typically involve client interaction—and each milestone triggers a set of follow-up tasks.

PROCORE BEST PRACTICES CHECKLIST				
Work 1 - Project Setup (Pre-Construction)				
Milestone: Working Drawing Requested	PROJECT ROLES			
Task: Create New Project	DPM	PM	S	C: Best Practice
[] Create new project	X			IMPORTANT: Always create a job in Procore at the time working drawings are requested.
[] Required field: Select Project Template	X			IMPORTANT: Choose "Standard Project Template".
[] Required field: Project Name	X			Use standard naming convention "see quick reference guide". Make sure it is check as "Active". This should be done automatically by Procore.
[] Required field: Active Project	X			This will be filled out later in by the Project Coordinator. Add email description of the scope of work. Copy this information from the "Scope of Work" area on the working drawings cover sheet.
[] Required field: Project C/Number	X			
[] Required field: Project Description	X			
[] Required field: Square feet	X			
[] Required field: Est. Start Date	X			Required: To be entered when the Final Budget (cost summary) is signed.
[] Required field: Est. Comp. Date	X			Required: To be entered when the Final Budget (cost summary) is signed.
[] Required field: Project Address	X			
[] Required field: City	X			
[] Required field: Country	X			
[] Required field: Timezone	X			
[] Required field: ZipCode	X			
[] Required field: Project Stage	X			IMPORTANT: Set the project stage to "Pre-Construction".
[] Required field: Office	X			
[] Required field: Project Type	X			
Task: Update Project Directory	DPM	PM	S	C: Best Practice
[] Add Person (Client)	X			Required: Add any Clients that will receive email from Procore.
[] Add Person (Tenant)	X			Required: Add any Tenant that will receive info from Procore.
[] Add Person (DPM) + Notify	X			Required: Add whoever will be the DPM.
[] Add Person (PM) + Notify	X			Required: Add whoever will be the PM.
[] Add Person (Superintendent) + Notify	X			Required: Add whoever will be the Superintendent (sometimes this will be the PM also).
[] Add Person (Coordinator) + Notify	X			Required: Add whoever will be the Coordinator (this can be changed later).
[] Add Distribution Group "Project Team"	X			IMPORTANT: Create a distribution group call "Project Team" and add all 4 team members to it (DPM, PM, S, C).
Task: Configure Project Team	DPM	PM	S	C: Best Practice
[] Action: Assign Roles	X			IMPORTANT: Assign someone to all 4 roles (DPM, PM, S, C). Sometimes the same person will be the PM & the superintendent.
Milestone: Working Drawings Completed	PROJECT ROLES			
Task: Upload Drawings & Docs	DPM	PM	S	C: Best Practice
[] Upload Drawings	X			IMPORTANT: Only design team member upload drawings.
[] Upload: Set name	X			Required: Examples of set names: "Permit Set" or "Bidding Set".
[] Upload: Set Date	X			Required.
[] Review & Publish: Drawing Number	X			Required.
[] Review & Publish: Drawing Title	X			Required.
[] Review & Publish: Revision	X			Required: Done automatically by Procore, confirm accuracy.
[] Review & Publish: Drawing Date	X			Required.
[] Review & Publish: Discipline	X			Required.
[] Email Drawings	X			IMPORTANT: Everyone you upload drawings (or drawing requests) email the drawings to the "Project Team" distribution group.
[] Email Drawings	X			IMPORTANT: Always send drawings to the client via Procore.
[] Upload Bid Documents in "Bid Documents"	X			Required: Any supplemental bid documents must be kept in the "Bid Documents" folder.

Screenshot of the "Procore Best Practices Checklist" showing columns for tasks, project roles (DPM, PM, S, C), and best practices. Blue bars highlight milestones such as "Working Drawing Requested" and "Working Drawings Completed." Tasks include creating a new project, updating the project directory, configuring the project team, and uploading drawings and documents, with required fields and responsible roles noted for each.

Use the checklist to confirm:

- The sequence of tasks required at each milestone.
- The roles responsible for each action.
- The best practices and required fields for each step.

Identify tasks tied to the "Working Drawing Requested" milestone

When a client requests working drawings, this triggers the **Working Drawing Requested** milestone. According to the checklist, the Design Project Manager (DPM) is primarily responsible for the initial tasks at this stage.

The three immediate tasks under this milestone are:

- Create a new project in Procore.
- Update the project directory.
- Configure the project team.

These tasks should be initiated as soon as working drawings are requested.

PROCORE BEST PRACTICES CHECKLIST				
Week 1 - Project Setup (Pre-Construction)				
Milestone: Working Drawings Requested		PROJECT ROLES		
Task		DPM	PM	S
Task: Create New Project				
Choose new project	x			C: Best Practice
Required: Select Project Template	x			IMPORTANT: Always create a job in Procore at the time working drawings are requested.
Required: Project Name	x			IMPORTANT: Choose "Standard Project Template"
Required: Field: Active Project	x			Use standard naming convention. See quick reference guide.
Required: Field: Project ID/Number	x			Make sure to check for "idiot". This should be done automatically by Procore.
Required: Field: Project Description	x			This will be filed out later in by the Project Coordinator.
Required: Field: Square Feet	x			Add small description of the scope of work. Copy this information from the "Scope of Work" area on the working drawings cover sheet.
Required: Field: Est. Start Date	x			Required: To be entered when the Final Budget (cost summary) is signed.
Required: Field: Est. Comp. Date	x			Required: To be entered when the Final Budget (cost summary) is signed.
Required: Field: Project Address	x			
Required: Field: City	x			
Required: Field: Country	x			
Required: Field: Timezone	x			
Required: Field: Zip Code	x			
Required: Field: Project Stage	x			IMPORTANT: Set the project stage to "Pre-Construction"
Required: Field: Office	x			
Required: Field: Project Type	x			
Task: Update Project Directory				
Add Person (Client)	x			Required: Add any Clients that will receive email from Procore.
Add Person (Owner)	x			Required: Add any Owner that will receive info from Procore.
Add Person (DPM) + Notify	x			Required: Add whoever will be the DPM.
Add Person (PM) + Notify	x			Required: Add whoever will be the PM.
Add Person (Superintendent) + Notify	x			Required: Add whoever will be the Superintendent (sometimes this will be the PM also).
Add Person (Coordinator) + Notify	x			Required: Add whoever will be the Coordinator (this can be changed later).
Add Distribution Group "Project Team"	x			IMPORTANT: Create a distribution group call "Project Team" and add all 4 team members to it (DPM, PM, S, C).
Task: Configure Project Team				
Admin: Assign Roles	x			IMPORTANT: Assign someone to all 4 roles (DPM, PM, S, C). Sometimes the same person will be the PM & the superintendent.
Milestone: Working Drawings Completed		PROJECT ROLES		
Task		DPM	PM	S
Task: Upload Drawings & Docs				
Upload: Set name	x			IMPORTANT: Only design team member upload drawings.
Upload: Set Date	x			Required: Examples of set names: "Permit Set" or "Bidding Set"
Review & Publish: Drawing Date	x			Required
Review & Publish: Drawing Number	x			Required
Review & Publish: Drawing Title	x			Required
Review & Publish: Revision	x			Required: Done automatically by Procore, confirm accuracy.
Review & Publish: Drawing Date	x			Required
Review & Publish: Discipline	x			Required
Email Drawings	x			IMPORTANT: Everyone who asked drawings (or drawing requests) email the drawings to the "Project Team" distribution group.
Email Drawings	x			IMPORTANT: Always send drawings to the client via Procore.
Upload Bid Documents in "Bid Documents"	x			Required: Any supplemental bid documents must be kept in the "Bid Documents" folder.

Procore Best Practices Checklist showing the "Working Drawing Requested" milestone, with tasks for creating a new project, updating the project directory, and configuring the project team, along with responsible roles and best practice notes.

The checklist also lists required fields for each task—such as Project Name, Project Address, and Project Stage—along with best practice notes. For example, you should always create a job in Procore at the time working drawings are requested, use your organization's standard naming convention, and set the project stage to **Pre-Construction**.

PROCORE BEST PRACTICES CHECKLIST				
Week 1 - Project Setup (Pre-Construction)				
Milestone: Working Drawings Requested		PROJECT ROLES		
Task: Create New Project	DPM / PM / S / C	Best Practice		
[] Create new project	x	IMPORTANT: Always create a job in Procore at the time working drawings are requested.		
[] Required: Select Project Template	x	IMPORTANT: Choose "Standard Project Template".		
[] Required field: Project Name	x	Use standard naming convention. See quick reference guide.		
[] Required field: Active Project	x	Make sure it is checked as "Active". This should be done automatically by Procore.		
[] Required field: Project ID Number	x	This will be filled out later in by the Project Coordinator.		
[] Required field: Project Description	x	Add small description of the scope of work. Copy this information from the "Scope of Work" area on the working drawings cover sheet.		
[] Required field: Square feet	x			
[] Required field: Est. Start Date	x	Required: To be entered when the Final Budget (cost summary) is signed.		
[] Required field: Est. Comp. Date	x	Required: To be entered when the Final Budget (cost summary) is signed.		
[] Required field: Project Address	x			
[] Required field: City	x			
[] Required field: Country	x			
[] Required field: Timezone	x			
[] Required field: Zip Code	x			
[] Required field: Project Stage	x	IMPORTANT: Set the project stage to "Pre-Construction".		
[] Required field: Office	x			
[] Required field: Project Type	x			
Task: Update Project Directory	DPM / PM / S / C	Best Practice		
[] Add Person (Client)	x	Required: Add any Clients that will receive email from Procore.		
[] Add Person (Team)	x	Required: Add any Team that will receive info from Procore.		
[] Add Person (DPM) + Notify	x	Required: Add whoever will be the DPM.		
[] Add Person (PM) + Notify	x	Required: Add whoever will be the PM.		
[] Add Person (Superintendent) + Notify	x	Required: Add whoever will be the Superintendent (sometimes this will be the PM also).		
[] Add Person (Coordinator) + Notify	x	Required: Add whoever will be the Coordinator (this can be changed later).		
[] Add Distribution Group "Project Team"	x	IMPORTANT: Create a distribution group call "Project Team" and add all 4 team members to it (DPM, PM, S, C).		
Task: Configure Project Team	DPM / PM / S / C	Best Practice		
[] Admin: Assign Roles	x	IMPORTANT: Assign someone to all 4 roles (DPM, PM, S, C). Sometimes the same person will be the PM & the Superintendent.		
Milestone: Working Drawings Completed		PROJECT ROLES		
Task: Upload Drawings & Docs	DPM / PM / S / C	Best Practice		
[] Upload Drawing	x	IMPORTANT: Only design team member upload drawings.		
[] Upload: Set name	x	Required: Examples of set names: "Thermal Set" or "Bidding Set"		
[] Upload: Set Date	x	Required:		
[] Review & Publish: Drawing Date	x	Required:		
[] Review & Publish: Drawing Number	x	Required:		
[] Review & Publish: Drawing Title	x	Required:		
[] Review & Publish: Revision	x	Required: Done automatically by Procore, confirm accuracy.		
[] Review & Publish: Drawing Date	x	Required:		
[] Review & Publish: Discipline	x	Required:		
[] Email Drawings	x	IMPORTANT: Everytime you upload drawings (or drawing revisions) email the drawings to the "Project Team" distribution group.		
[] Email Drawings	x	IMPORTANT: Always send drawings to the client via Procore.		
[] Upload Bid Documents in "Bid Documents"	x	Required: Any supplemental bid documents must be kept in the "Bid Documents" folder.		

Close-up of the checklist showing required fields and best practice notes for creating a new project, updating the project directory, and configuring the project team.

Step 1: Log in to Procore

Open your web browser and navigate to <https://app.procore.com/account/login>. The login page displays the Procore logo, a login form, and informational panels about financial data and webinars.

Enter your email address and password, then click the orange **Log In** button. If you want your email saved for future logins, check **Remember my email on this computer** before signing in.

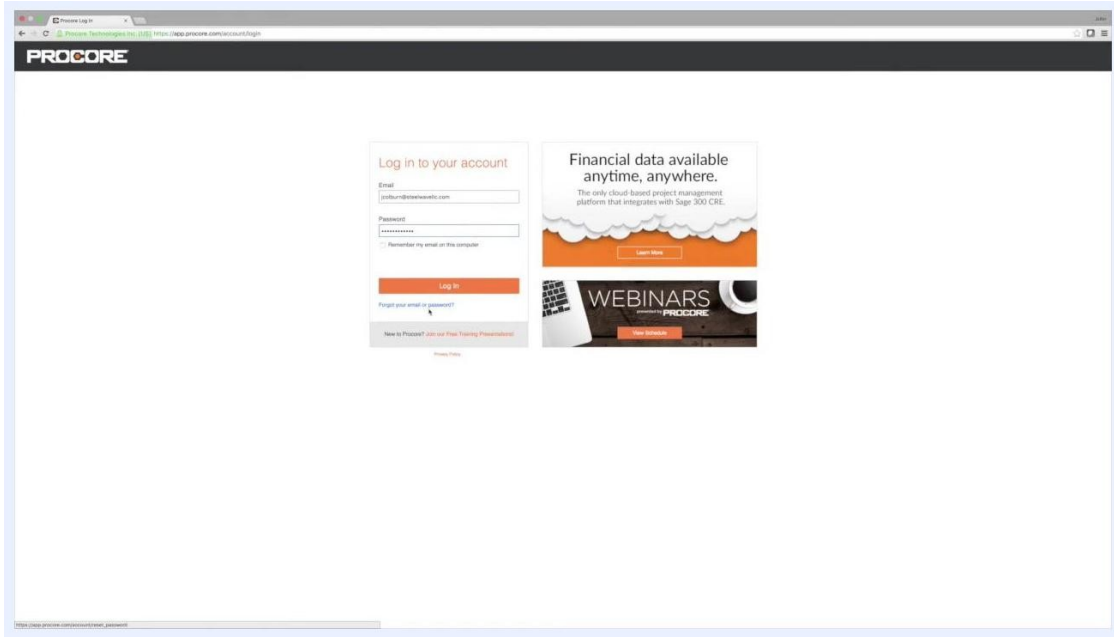
PROCORE BEST PRACTICES CHECKLIST				
Week 1 - Project Setup (Pre-Construction)				
Milestone: Working Drawings (Required)		PROJECT RULES		
[] Task: Create New Project	DFM - PM - S - C	Best Practice		
[] Create new project	x	IMPORTANT: Always create a job in Procore at the time working drawings are requested.		
[] Required: Select Project Template	x	IMPORTANT: Choose "Standard Project Template"		
[] Required field: Project Name	x	Use standard naming convention. See quick reference guide.		
[] Required field: Active Project	x	Make sure it is checked as "Active". This should be done automatically by Procore.		
[] Required field: Project C/Number	x	This will be filled out later in by the Project Coordinator.		
[] Required field: Project Description	x	Add small description of the scope of work. Copy this information from the "Scope of Work" area on the working drawings cover sheet.		
[] Required field: Square feet	x	Required: To be entered when the Final Budget (cost summary) is signed.		
[] Required field: Est. Start Date	x	Required: To be entered when the Final Budget (cost summary) is signed.		
[] Required field: Est. Comp. Date	x			
[] Required field: Project Address	x			
[] Required field: City	x			
[] Required field: Country	x			
[] Required field: Timezone	x			
[] Required field: Zip/Code	x			
[] Required field: Project Stage	x	IMPORTANT: Set the project stage to "Pre-Construction"		
[] Required field: Office	x			
[] Required field: Project Type	x			
[] Task: Update Project Directory	DFM - PM - S - C	Best Practice		
[] Add Person (Client)	x	Required: Add any Clients that will receive email from Procore.		
[] Add Person (Tenant)	x	Required: Add any Tenant that will receive info from Procore.		
[] Add Person (DFM) + Notify	x	Required: Add whoever will be the DFM.		
[] Add Person (PM) + Notify	x	Required: Add whoever will be the PM.		
[] Add Person (Superintendent) + Notify	x	Required: Add whoever will be the Superintendent (sometimes this will be the PM also).		
[] Add Person (Coordinator) + Notify	x	Required: Add whoever will be the Coordinator (this can be changed later).		
[] Add Distribution Group "Project Team"	x	IMPORTANT: Create a distribution group called "Project Team" and add all team members to it (DFM, PM, S, C).		
[] Task: Configure Project Team	DFM - PM - S - C	Best Practice		
[] Admin: Assign Roles	x	IMPORTANT: Assign someone to all 4 roles (DFM, PM, S, C). Sometimes the same person will be the PM & the superintendent.		
Milestone: Working Drawings (Optional)		PROJECT RULES		
[] Upload Drawings & Docs	DFM - PM - S - C	Best Practice		
[] Upload Drawings	x	IMPORTANT: Only design team member upload drawings.		
[] Upload: Set name	x	Required: Examples of set names: "Pinned Set" or "Rolling Set"		
[] Upload: Set Date	x	Required		
[] Review & Publish: Drawing Date	x	Required		
[] Review & Publish: Drawing Number	x	Required		
[] Review & Publish: Drawing Title	x	Required		
[] Review & Publish: Revision	x	Required: Done automatically by Procore, confirm accuracy.		
[] Review & Publish: Drawing Date	x	Required		
[] Review & Publish: Discipline	x	Required		
[] Email Drawings	x	IMPORTANT: Everytime you upload drawings (or drawing revisions) email the drawings to the "Project Team" distribution group.		
[] Email Drawings	x	IMPORTANT: Always send drawings to the client via Procore.		
[] Upload Bid Documents in "Bid Documents"	x	Required: Any supplemental bid documents must be kept in the "Bid Documents" folder.		

Procore login screen with fields for email and password, a "Log In" button, and informational panels about financial data and webinars.

If you are new to Procore, you can click **Join our Free Training Presentations!** for additional help.

If you or a subcontractor cannot log in

If you've forgotten your email or password, use the **Forgot your email or password?** link on the login page to reset your credentials. This feature is available to all users and is simple to use—direct subcontractors to this link if they have trouble accessing their accounts.



Procore login screen with the "Forgot your email or password?" link highlighted, along with the email and password fields and informational panels.

If login issues persist, contact your company's support contact for assistance. Make sure everyone on your team has an active Procore account before proceeding.

Step 2: Open the Portfolio List

After logging in, you'll land on the Procore Portfolio List. This screen displays all current projects, with columns for Name, Project #, Address, City, State, ZIP, Phone, Program, Status, Stage, Type, Department, and Notes. Use the search and filter options on the right to locate existing projects if needed.

To start creating a new project, click the orange **+ Add New Project** button located at the top right of the Portfolio List screen.

PROCORE BEST PRACTICES CHECKLIST			
Week 1 - Project Setup (Pre-Construction)			
Task	Role	Frequency	Best Practice
[] Task: Create New Project	DPM, PM, S, C	Once	IMPORTANT: Always create a job in Procore at the time working drawings are uploaded
[] Create new project	x		IMPORTANT: Choose "Standard Project Template"
[] Required field: Project Name	x		Use standard naming convention: "see quick reference guide"
[] Required field: Project Address	x		Make sure it is thick as "Address". This should be done automatically by Procore
[] Required field: Project City	x		This will be filled out later in by the Project Coordinator
[] Required field: Project State	x		Add email description of the scope of work. Copy this information from the "Scope of Work" area on the working drawings cover sheet
[] Required field: Project Description	x		
[] Required field: Square Feet	x		
[] Required field: Est. Start Date	x		Required: To be entered when the Final Budget (cost summary) is signed
[] Required field: Est. Comp. Date	x		Required: To be entered when the Final Budget (cost summary) is signed
[] Required field: Project Address	x		
[] Required field: City	x		
[] Required field: Country	x		
[] Required field: Timezone	x		
[] Required field: Zip Code	x		
[] Required field: Project Stage	x		IMPORTANT: Set the project stage to "Pre-Construction"
[] Required field: Office	x		
[] Required field: Project Type	x		
[] Task: Update Project Directory	DPM, PM, S, C	Once	Best Practice
[] Add Person (Client)	x		Required: Add any Clients that will receive email from Procore
[] Add Person (Tenant)	x		Required: Add any Tenant that will receive info from Procore
[] Add Person (DPM) + Notify	x		Required: Add whoever will be the DPM
[] Add Person (PM) + Notify	x		Required: Add whoever will be the PM
[] Add Person (Superintendent) + Notify	x		Required: Add whoever will be the Superintendent (sometimes this will be the PM also)
[] Add Person (Coordinator) + Notify	x		Required: Add whoever will be the Coordinator (this can be changed later)
[] Add Distribution Group "Project Team"	x		IMPORTANT: Create a distribution group call "Project Team" and add all 4 team members to it (DPM, PM, S, C)
[] Task: Configure Project Team	DPM, PM, S, C	Once	Best Practice
[] Admin: Assign Roles	x		IMPORTANT: Assign someone to all 4 roles (DPM, PM, S, C). Sometimes the same person will be the PM & the superintendent
[] Admin: Assign Roles	x		
[] Task: Upload Drawings & Docs	DPM, PM, S, C	Once	Best Practice
[] Upload Drawing	x		IMPORTANT: Only design team member upload drawings
[] Upload: Set name	x		Required: Examples of set names: "Permit Set" or "Bidding Set"
[] Upload: Set Date	x		Required
[] Review & Publish: Drawing Date	x		Required
[] Review & Publish: Drawing Number	x		Required
[] Review & Publish: Drawing Title	x		Required
[] Review & Publish: Revision	x		Required: Done automatically by Procore, confirm accuracy
[] Review & Publish: Drawing Date	x		Required
[] Review & Publish: Discipline	x		Required
[] Email Drawings	x		IMPORTANT: Everytime you upload drawings (or drawing revisions) email the drawings to the "Project Team" distribution group
[] Email Drawings	x		IMPORTANT: Always send drawings to the client via Procore
[] Upload Bid Documents in "Bid Documents"	x		Required: Any supplemental bid documents must be kept in the "Bid Documents" folder

Procore Portfolio List screen with the **" + Add New Project"** button highlighted, a list of existing projects, and filter and search options on the right.

Step 3: Select a standard project template

When the **Create a new project...** dialog appears, locate the **Select a project template** dropdown. Choose your organization's standard project template to ensure consistency across all projects. If you're unsure which template to use, refer to your company's guidelines or the Procore Best Practices Checklist.

Click **Continue** to proceed.

Dialog box titled "Create a new project..." with a dropdown for selecting a project template, and "Continue" and "Cancel" buttons visible over the Portfolio List.

This takes you to the **Create New Project** form, divided into three sections: Project Setup, Project Address, and General Project Settings. The page header confirms you're on **STEP 1 OF 2**.

Step 4: Enter the project name

In the **Project Name** field under Project Setup, enter the project name according to your organization's standard naming convention. If you don't know the naming convention, consult the quick reference guide included in your onboarding materials. For training purposes, you can use the project number as the project name (for example, "Project 18").

Make sure the **Active Project?** checkbox is checked—it is checked by default.

The screenshot shows the 'Create New Project' form in the STEELWAVE application. The form is titled 'Create New Project' and is labeled 'STEP 1 OF 2'. It is divided into three main sections: 'PROJECT SETUP', 'PROJECT ADDRESS', and 'GENERAL PROJECT SETTINGS'. In the 'PROJECT SETUP' section, the 'Project Name' field is highlighted with a blue border, and a dropdown menu is open showing suggestions: 'Procure Training Project', 'Project 18', and 'Project 20'. The 'Active Project?' checkbox is checked. The 'PROJECT ADDRESS' section includes fields for 'Project Address', 'City', 'Country/State', 'Timezone', and 'ZIP'. The 'GENERAL PROJECT SETTINGS' section includes fields for 'Project Stage', 'Project Type', 'Department', 'Office', 'Project Flag', and 'Program'. A 'Continue' button is located at the bottom right of the form.

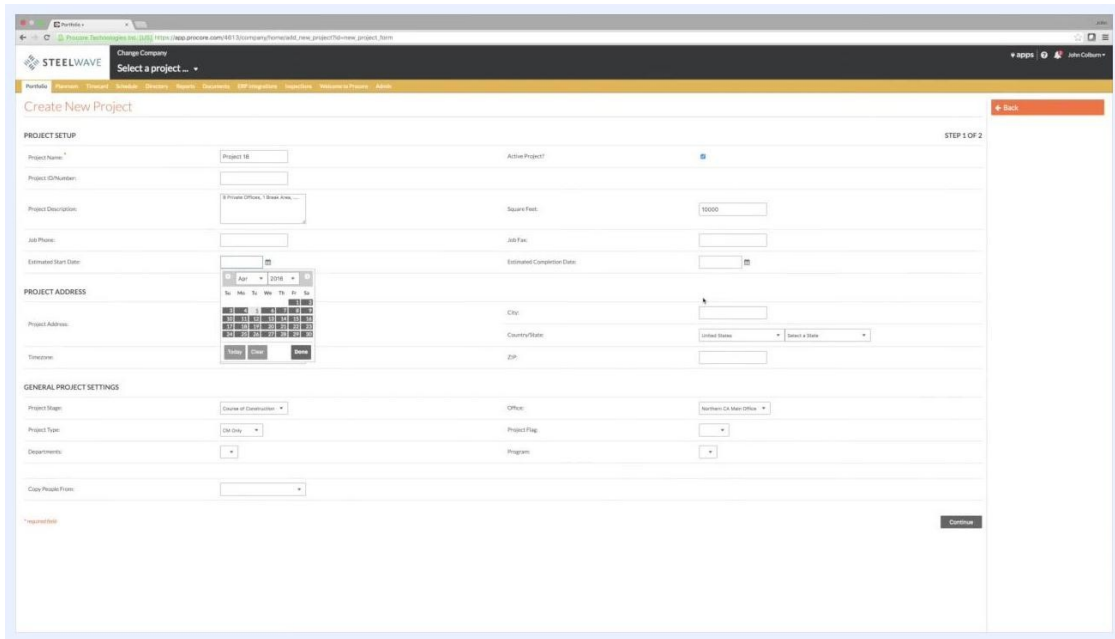
Create New Project form with the Project Name field highlighted and a dropdown showing suggested names such as "Procure Training Project," "Project 18," and "Project 20." The "Active Project?" checkbox is checked.

Step 5: Enter the Project ID/Number

Locate the **Project ID/Number** field directly below Project Name. Enter the official project number as listed on your organization's project roster—this field is used for tracking and reporting purposes. If the number is not yet known, you can leave this field blank and fill it in later.

Step 6: Enter the project description

Click into the **Project Description** field and enter a short description similar to what would typically appear on the cover sheet of the working drawings. For example: **3 Private Offices, 1 Break Area, ...** If you're unsure what to enter, use a brief summary of the project scope.



Project Description field filled with example text: "3 Private Offices, 1 Break Area, ..."

Step 7: Enter square footage and optional details

In the **Square Feet** field, enter the appropriate value (for example, **10000**).

You can also fill in the following optional fields as needed:

- **Job Phone:** Leave blank if not specified.
- **Job Fax:** Leave blank if not specified.
- **Estimated Start Date:** Click the calendar icon and select the appropriate date.
- **Estimated Completion Date:** Leave blank if not specified.

Step 8: Fill in the Project Address fields

Complete all required fields in the Project Address section:

- **Project Address:** Enter the street address.
- **City:** Enter the city name.
- **Country/State:** Select the appropriate country and state.

- **ZIP:** Enter the ZIP code.

These fields are required and must not be left blank. The system may auto-populate some fields, but you should verify that all required information is filled in correctly.

The screenshot shows the 'Create New Project' form in the STEELWAVE system. The form is titled 'STEP 1 OF 2'. The 'PROJECT ADDRESS' section is highlighted with a yellow background. The fields in this section are: Project Address (4000 E 3rd Ave), City (Foster City), Country/State (United States | California), and ZIP (94024). The 'PROJECT SETUP' section includes fields for Project Name, Project ID Number, Project Description, Job Phone, Estimated Start Date, Square Feet (10000), Job Fax, and Estimated Completion Date. The 'GENERAL PROJECT SETTINGS' section includes fields for Project Stage, Project Type, Department, Office, Project Flag, Program, and City People Print. A 'Back' button is in the top right, and a 'Continue' button is in the bottom right.

Project Address, City, Country/State, and ZIP fields highlighted and filled in.

Step 9: Set the timezone

In the **Timezone** dropdown, confirm it is set to the correct timezone for your project (for example, [\(GMT-08:00\) Pacific Time \(US & Canada\)](#)). Setting the correct timezone is important because it affects scheduling and notifications.

The screenshot shows the 'Create New Project' form in the STEELWAVE application. The form is divided into three main sections: PROJECT SETUP, PROJECT ADDRESS, and GENERAL PROJECT SETTINGS. The 'Timezone' dropdown in the PROJECT ADDRESS section is highlighted, showing the selected value: '(GMT-08:00) Pacific Time (US & Canada)'. The form includes various input fields for project details, address, and settings, along with a 'Back' button and a 'Continue' button.

PROJECT SETUP	
Project Name*	Project ID#
Project ID#Number	Active Project?
Project Description	Project Size
Job Phone	Job Fax
Estimated Start Date	Estimated Completion Date

PROJECT ADDRESS	
Project Address	City
Country/State	ZIP
Timezone	

GENERAL PROJECT SETTINGS	
Project Stage	Office
Project Type	Project Flag
Department	Program
Copy Project From	

Timezone dropdown set to (GMT-08:00) Pacific Time (US & Canada).

Step 10: Select the Project Stage

Under General Project Settings, open the **Project Stage** dropdown and choose the stage that matches your project. For a job in the planning phase, select **Pre-Construction**. Other available options include **Bidding**, **Course of Construction**, and **Post-Construction**.

The screenshot shows the 'Create New Project' form in the STEELWAVE application. The form is divided into three main sections: PROJECT SETUP, PROJECT ADDRESS, and GENERAL PROJECT SETTINGS. The 'Project Stage' dropdown in the GENERAL PROJECT SETTINGS section is open, showing four options: Bidding, Course of Construction, Pre-Construction (which is highlighted with a blue background), and Post-Construction. Other fields in the form include Project Name, Project ID Number, Project Description, Job Phone, Estimated Start Date, Estimated Completion Date, Project Address, City, Country/State, ZIP, Office, Project Tag, Department, and Program. The form is labeled 'STEP 1 OF 2' and has a 'Back' button in the top right corner.

Project Stage dropdown open with "Pre-Construction" selected.

Step 11: Choose the Project Type

Open the **Project Type** dropdown and select the type that best fits your project. For example, select **Design/VDC**. Other available options include **CM Only**, **Design Only**, **Design/CM**, and **GC Only**.

The screenshot shows the 'Create New Project' form in the STEELWAVE application. The 'Project Type' dropdown menu is open, displaying four options: 'Design Only', 'Design/CM', 'Design/VDC' (which is highlighted with a blue selection bar), and 'CM Only'. The form is divided into several sections: 'PROJECT SETUP' with fields for Project Name, Project ID/Number, Project Description, Square Feet, Job Phase, Estimated Start Date, and Estimated Completion Date; 'PROJECT ADDRESS' with fields for Project Address, City, Country/State, and ZIP; and 'GENERAL PROJECT SETTINGS' with fields for Project Stage, Office, Project Tag, and Program. A 'Continue' button is located at the bottom right of the form.

Project Type dropdown open with "Design/VDC" selected.

Step 12: Review your entries before continuing

Before submitting, double-check that all required fields—marked with a red asterisk—are completed correctly. Your entries should include values such as:

- Project Name
- Project Description
- Square Feet
- Project Address, City, Country/State, and ZIP
- Timezone
- Project Stage
- Project Type

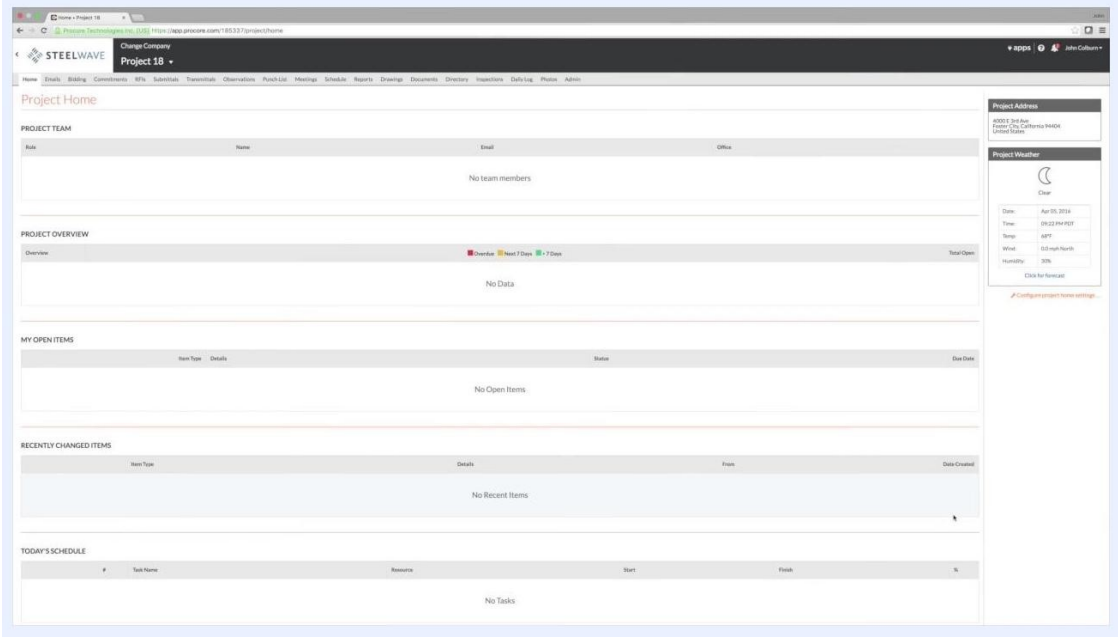
- Office

Project Description and Square Feet fields filled in, with the calendar open for selecting the Estimated Start Date.

Note: The project number is typically the responsibility of the project coordinator and may be left blank or filled in later, depending on your organization's process. For the Project Description, use a concise summary similar to what would appear on the cover sheet of the working drawings.

Step 13: Submit the form

Once all required fields are completed, click the **Continue** button at the bottom right of the form. Wait for the system to process your request.



The screenshot shows the 'Project Home' page for 'Project 10' in the STEELWAVE system. The page is divided into several sections:

- Project Team:** A table with columns 'Role', 'Name', 'Email', and 'Office'. It currently shows 'No team members'.
- Project Overview:** A section with a 'No Data' message.
- My Open Items:** A table with columns 'Item Type', 'Details', 'Status', and 'Due Date'. It currently shows 'No Open Items'.
- Recently Changed Items:** A table with columns 'Item Type', 'Details', 'From', and 'Date Created'. It currently shows 'No Recent Items'.
- Today's Schedule:** A table with columns 'Task Name', 'Resource', 'Start', 'Finish', and '%'. It currently shows 'No Tasks'.

On the right side, there is a sidebar with 'Project Address' (4000 E 3rd Ave, Project City, California 94001, United States) and 'Project Weather' (Clear, Date: Apr 05, 2024, Time: 09:23 AM PST, Temp: 68°F, Wind: 6-10 mph North, Humidity: 55%, and a 'Click for Forecast' link).

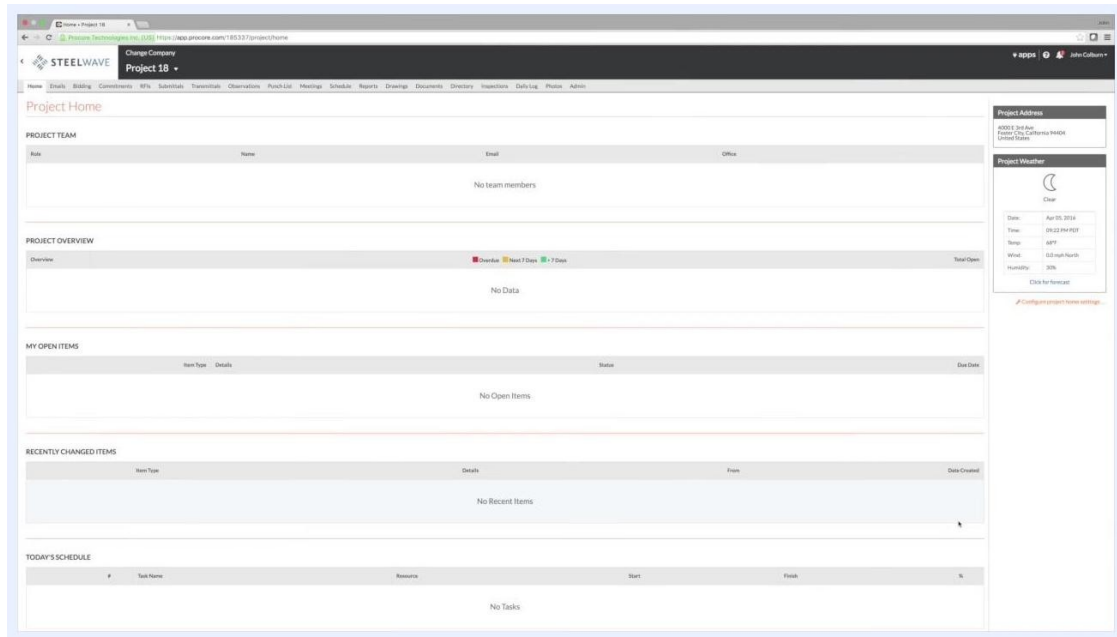
All fields completed and ready for submission, with the Continue button visible.

Step 14: Verify that the project was created

After submission, you're redirected to the **Project Home** page for your new project. This page initially displays:

- Project Team (empty until members are added)
- Project Overview (no data yet)
- My Open Items (none yet)
- Recently Changed Items (none yet)
- Today's Schedule (no tasks yet)

The right sidebar shows the Project Address and Project Weather. Confirm that the project name and address details match what you entered.



Project Home page for the newly created project, showing empty sections and the project address in the sidebar.

Best practices and notes

- Always complete all required fields before submitting the form.
- Use clear, descriptive names and summaries so the project is easy to identify later.
- For training or practice purposes, use example values as needed.
- The project number is the coordinator's responsibility and can be added later if it's not yet known.

What's next

Now that you know how to create a new project in Procore, you can invite team members, update the project directory, and configure additional project settings to continue setting up collaboration on the project.