

PROCORE INTERFACE

Last modification: October 29, 2025

Lesson Plan

By the end of the *Procore Interface* course, the client and targeted users will be able to configure the essential components of the interface, understand how it works with **maestro***, and use its main features related to their processes.

Unit PRO01 - Preliminary Analysis and Configurations

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Material	Targeted Audience
At the end of this session, the client and designated users will be able to operate maestro* at the <i>Procore</i> interface level. <i>PREREQUISITES</i> • <i>Project Management</i> • <i>Security Management</i> • <i>Supplier Management</i> • <i>Customer Management</i> • <i>Catalogue</i> • <i>Purchase Order Management</i> • <i>Subcontract Management</i> <i>OPTIONAL PREREQUISITES</i>	• Analysis • Procore configurations (Maintenance - Interface Maintenance - Procore) • Addition of the “Marketplace” application • Authentication parameters • Discussion of master data sources • Initial connection tests with Procore	• Discussion of the current and future process (strengths and weaknesses) • Definition of users and processes for the creation of various data necessary for proper functioning • Explanation and completion of basic configurations guiding implementation • Decision-making <i>HOMEWORK</i> • <i>Reflect on discussions</i>	3 h	• Preliminary Configurations for Data Synchronization with Procore	Pilot

Objective	Content	Conduct	Time	Learning Material	Targeted Audience
- Install the maestro* mobile component - Procore Sandbox Environment					

Unit PRO02 - Configurations - *Procore/maestro**

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Material	Targeted Audience
At the end of this session, designated users will be able to define and configure the synchronization screen with the modules.	- Define Project Templates - Project Management - Supplier Management - Customer Management - Company Parameters - Orders	- Review of previous concepts and validation of homework assignments - Explanation and completion of the project, supplier, client, and company settings management screens, based on client needs and system requirements, with the goal of automating data entry <i>HOMEWORK</i> - Finalize databases	1 h	Synchronizing maestro* with Procore - Data Mapping	Pilot and/or Super Users

Unit PRO03 - Operations - *Procore* Interface Synchronization

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Material	Targeted Audience
At the end of this session, designated users will be able to configure and use the various elements and processes of the Procore interface.	- Update configurations according to the decisions made - Bidirectional synchronization of transactional data flows between maestro* and Procore	- Review of previous concepts and validation of homework assignments - User training according to the process established during the analysis <i>HOMEWORK</i> <i>Practice entering transactions into the test environment</i>	2 h	Data Synchronization with Procore	Pilot and/or Super Users

Unit PRO04 - Operational Training - *Procore* Interface Synchronization

Optional Session - Training of the client's employees with the implementation specialist

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Material	Targeted Audience
At the end of this session, designated users will be able to configure and use the various elements and processes of the Procore interface.	- Update configurations according to the decisions made - Synchronization	- Review of previous concepts and validation of homework assignments - User training according to the process established at the time of analysis <i>HOMEWORK</i> <i>Practice entering transactions into the test environment</i>	2 h	Data Synchronization with Procore	Pilot Super Users Users

Unit PRO05 - Analysis and Inquiry

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Material	Targeted Audience
At the end of this session, designated users will be able to use the analysis and report tools in maestro* to find the information they need regarding the <i>Procore</i> interface.	Project Inquiry	Review of previous concepts and validation of homework assignments	30 min		Pilot Super Users Users

Unit PRO06 - Form Validation

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Material	Targeted Audience
N/A	N/A	N/A	N/A	N/A	N/A

Unit PRO07 - Tests and Validation

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Material	Targeted Audience
At the end of this session,	Tools	Validation of transactions in maestro* and Procore	1 h 30 min		Pilot

Objective	Content	Conduct	Time	Learning Material	Targeted Audience
designated users will have carried out the tests and verifications to validate the configurations made beforehand, and will be able to attest to the adequacy of these configurations with the established processes.		- Budget adjustment - Review of configurations, if applicable - Process review, if applicable - Presentation of the questions during the closing meeting. If necessary, addition of an extra training session <i>HOMEWORK</i> <i>Complete the integrated tests</i>			Users

Unit PRO08 - Conclusion

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Material	Targeted Audience
At the end of this session, designated users will have shown the necessary knowledge and skills to use the <i>Procore</i> interface.	- Learning validation - Security review - Follow-up on questions	Preparation of upcoming training sessions	1 h	Acquired competencies form - PRO	Pilot