Site Map

Below is an exhaustive sitemap of Procore's Support Center site (https://support.procore.com).

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- Customer Success
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Procore Refresher Roadmap

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Product Line Training Resources

Procore (Español)

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Solicitar Soporte Técnico

Tutoriales

- Abrir un presupuesto
- Actualizar documentos de licitación
- Agregar un seguro de proyecto a un registro de compañía en el directorio del proyecto
- Agregar un ítem relacionado a una inspección
- Agregar y remover herramientas del proyecto
- Añadir un comentario a una tarea
- Añadir una foto a una entrada de registro diario para que se incluya en la herramienta Fotos
- Añadir una partida a un contrato
- Añadir un nuevo proyecto
- Añadir un usuario al directorio del proyecto
- Añadir una persona al directorio de la compañía
- Cambiar el estatus de una tarea
- Cambiar la persona responsable en un RFI
- Cambiar los permisos de un usuario
- Clonar un reporte personalizado a nivel proyecto
- Comparar versiones de planos
- Configuraciones avanzadas: Órdenes de cambio
- Configurar las cámaras web de un proyecto
- Crear entradas al reporte diario de construcción
- Crear entradas en el registro diario como colaborador
- Crear respuestas de submittals personalizadas
- Crear un álbum de fotos
- Crear un correo electrónico
- Crear un costo indirecto
- Crear un evento extraordinario
- Crear un incidente
- Crear un juego de especificaciones
- Crear un paquete de licitación
- Crear un RFI
- Crear una hoja de tiempo
- Crear una plantilla de inspección a nivel proyecto
- Crear una solicitud de orden de cambio (SOC)
- Descargar archivos y carpetas
- Distribuir una agenda de reunión
- Distribuir y redistribuir las minutas de la reunión
- Editar secciones de especificaciones y divisiones
- Editar un submittal
- Eliminar planos
- Eliminar una partida del presupuesto
- Enviar archivos y carpetas por correo electrónico desde la herramienta Documentos del proyecto
- Enviar una pregunta previa a la oferta
- Escoger una "Respuesta oficial" para un RFI
- Habilitar la integración de DocuSign en un proyecto
- Importar costos indirectos
- Integra un programa de Microsoft Project con Procore Drive
- Otorgar una oferta ganadora y convertirla en un contrato
- ¿Qué formatos de fecha son compatibles al importar costos indirectos de un archivo CSV?
- Reenviar un submittal para su revisión
- Revisar y publicar especificaciones
- Solicitar un cambio al programa
- Solicitar un importe de códigos de costo
- Suscribirse al registro de planos
- Ver planos
- Ver un documento
- Vista general del registro diario

**FAQ**
- What are App Management Metrics and how do I access them?
- Are accounting approvers notified when data is awaiting acceptance in the ERP Integrations tool?
- Are pending commitments automatically synced with integrated ERP systems?
- Are subcontracts and purchase orders private by default?
- Are there additional costs to use Procore Sync?
- Are there any system limitations when projects have multiple prime contracts?
- At what tier can an owner approve a Prime Contract Change Order (PCCO)?
- Can a person be associated with multiple vendor/company records in the Company Level Directory Tool?
- Can bidders submit their bid via email or must they sign in?
- Can I access Forms offline?
- Can I add personal avatars or profile photos for other users?
- Can I apply permission templates to multiple contacts at one time?
- Can I attach a photo to a punch list item from my mobile device?
- Can I change a person's email address in the Directory?
- Can I change the language of my Company, Project, or User in Procore?
- Can I change the language that Procore scans my drawings for?
- Can I change the name of a meeting?
- Can I change the selected vendor type after a company has been synced?
- Can I copy one project's Documents folders to a new project?
- Can I create a list of overdue Prime Contract Change Orders (PCCOs)?
- Can I create an RFI with a duplicate number?
- Can I customize the project type options in Portfolio Financials and Capital Planning?
- Can I delete a Sage 300 CRE cost code, cost type, or vendor from Procore?
- Can I disable the Change Events tool?
- Can I edit my change order or invoice in Portfolio Financials?
- Can I edit or delete a commitment after it's been synced with an integrated ERP system?
- Can I enable the Change Events tool on my existing project?
- Can I enforce required fields in a form?
- Can I export a correspondence if it is set to private?
- Can I export Procore budget modifications to an integrated ERP system?
- Can I fill out a form on my mobile device?
- Can I fill out forms on the web version of Procore?
- Can I import clashes and clash groups into the Coordination Issues tool?
- Can I include deducts in my bid submission in the Bid Room?
- Can I include required fields in a fillable PDF form?
- Can I include signature fields in my fillable PDFs?
- Can I integrate my LMS with Procore Certification?
- Can I limit the number of cost codes available to choose from when creating timesheet entries?
- Can I log into the Procore Web application directly if my company has implemented SSO?
- Can I make all my emails private?
- Can I make files and folders in the Documents tool private by default?
- Can I mark all photos 'Private' in the project's Photos tool?
- Can I print or export a copy of my bid in the Bid Room?
- Can I provide users with 'Read-Only' level permissions with limited access to update information in Procore?
- Can I rearrange the order of daily log sections?
- Can I receive a daily activity summary for Portfolio Financials and Capital Planning?
- Can I receive weather delay alerts by phone or email?
Can I remove a line item from a bid?
Can I report on content in the Forms tool?
Can I rotate a drawing in Procore?
Can I search the contents of a fillable PDF?
Can I send a bid update email to every vendor/subcontractor?
Can I send correspondence after the bid due date?
Can I set up multiple Favorites lists for my project tools to apply to different projects?
Can I update the Percent Complete field on the Procore web application?
Can I upload drawings with the same revision?
Can I upload fillable PDFs that are password protected?
Can I use Procore Sync offline to update my files?
Can I use Procore’s mobile application in offline mode?
Can I use the Procore Extracts application on a Mac?
Can I watch Procore Certification and Continuing Education courses from my mobile device?
Can I integrate an existing Sage project with Procore?
Can the drawing markup tool be disabled?
Can users with 'Standard' level permission create RFIs?
Can we import our third-party timecard entries to work with the 'Timesheet Hours' column in Procore’s Budget tool?
Can you make a correspondence that is set to private public?
Can I Unlink PCCOs Synced with an ERP System?
¿Cómo la actualización de la seguridad de la capa del transporte v1.2 afecta a los usuarios?
¿Cómo puedo crear un PDF con campos que se pueden rellenar?
¿Cómo puedo mantener el formato de los códigos de costo de mi presupuesto en Excel?
¿Cómo puedo restablecer una contraseña?
¿Cómo puedo ver de dónde provienen mis partidas no presupuestadas?
¿Cuál es el proceso de lanzamiento para Requisiciones de Pago?
Do I need to create a dedicated user account in Sage 300 CRE for the hh2 synchronization client?
Do I need to create Procore user accounts if our company implements SSO?
Do meetings integrate with Microsoft Outlook Calendar?
Do milestones in Portfolio Financials sync with my external project schedule?
Do Procore’s SSO integrations support single or multiple domains?
Do project owners and subcontractors need a DocuSign® account?
Do we have to create and send all our project emails with the Emails tool?
Does a user need to log in to Procore to respond to an RFI?
Does an invoice contact need an 'Invite to Bill' to submit an invoice?
Does Procore Sync work with my network drive?
Does Procore Sync support proxy servers?
Does Procore Sync work with Macintosh computers or my mobile device?

Does the hh2 synchronization process for Sage 100 Contractor require a Terminal Server?

Does the hh2 synchronization process for Sage 300 CRE require a Terminal Server?

For which items in Procore should I make templates?

How are commitments numbered in Procore?

How are submittals numbered in Procore?

How are the date columns in submittal custom reports calculated?

How can bidders get locked out of a sealed Bid Room in Portfolio Financials?

How can I add custom bid form templates for the Bid Room in Portfolio Financials?

How can I add custom Cost Tracker templates in Portfolio Financials?

How can I add the 'Procore] Project Shutdown' inspection template to my Procore account?

How can I budget individual values within a cost item in Portfolio Financials?

How can I check who has permissions to see a specific correspondence?

How can I check who has permissions to see a type of correspondence?

How can I determine the order in which change orders were approved?

How can I email a submittal so people can reply through email?

How can I grant a 'Limited' user access to a specific Bid Room in Portfolio Financials?

How can I handle CM fees in Portfolio Financials?

How can I improve the accuracy of OCR on my drawings?

How can I improve the accuracy of Specification Section Identification?

How can I keep track of emailed drawings?

How can I manually add a bid in Portfolio Financials?

How can I monitor activity across all of my buildings in Portfolio Financials and Capital Planning?

How can I move drawings to another drawing area?

How can I request a folder template for Documents in my Portfolio Financials projects?

How can I run a best and final round of bidding in Portfolio Financials?

How can I see where my non-budgeted line items are coming from?

How can I set up a tenant construction chargeback in the Cost Tracker?

How can I share access to a Bid Room in Portfolio Financials?

How can I share access to a Contract Room in Portfolio Financials?

How can I tell if a Procore project is synced with an integrated ERP system?

How can I tell if a Procore project's budget is synced with an integrated ERP system?

How can I unaward a bid or contract in Portfolio Financials?

How can I use Procore's Hot Work Permit PDF in my project's Forms tool?

How can I use Procore's Incidents tool to record Coronavirus (COVID-19) infection information?

How can I use Procore's Job Hazard Analysis PDF in my project's Forms tool?

How can I use Procore's Toolbox Talk Sign-In PDF in my project's Forms tool?

How can I use tax codes on a Procore project?
• How can I use the '[NextWave Safety Solutions] Concrete Pre-Pour’ inspection template on my project?
• How can I use the '[NextWave Safety Solutions] Ladder Safety - Simple Checklist' inspection template on my project?
• How can I use the '[OAC Management Inc.] Pre-Backfill Checklist' inspection template on my project?
• How can I use the '[OAC Management Inc.] Pre-Drywall Checklist' inspection template on my project?
• How can I use the '[OAC Management Inc.] Pre-Roofing Checklist' inspection template on my project?
• How can I use the '[OSHA] Daily Inspection of Trenches and Excavations' inspection template on my project?
• How can I use the '[OSHA] Lockout/Tagout Procedures' inspection template on my project?
• How can I use the '[OSHA] Materials Handling' inspection template on my project?
• How can I use the '[Procore] Equipment Pre-Operation Checklist' inspection template on my project?
• How can I use the '[Procore] Jobsite Cleanliness and Preparedness Checklist' inspection template on my project?
• How can I use the '[Procore] SWPPP - Construction Site Stormwater Checklist' inspection template on my project?
• How can I view a custom Training Center?
• How can I view reports of a single log, or a single person within a log?
• How do approval workflows get set up in Portfolio Financials?
• How do bid approvals work in Portfolio Financials?
• How do budget approvals work in Portfolio Financials?
• How do Cash Flow Forecasts and Capital Plans interact in Portfolio Financials and Capital Planning?
• How do change order approvals work in Portfolio Financials?
• How do contract approvals work in Portfolio Financials?
• How do I access my company's Training Center?
• How do I add a building to my account in Portfolio Financials?
• How do I add a multi-tiered location to an item?
• How do I add a new Sage 300 CRE cost code or cost type?
• How do I add additional contacts to a vendor profile in Portfolio Financials?
• How do I add an avatar or profile photo to Procore?
• How do I add GST to my budget?
• How do I add or edit project cost codes when my company's Procore account is ERP-integrated?
• How do I add people to the submittal workflow?
• How do I add 'Procore' as an endorsable skill on my LinkedIn profile?
• How do I add someone as an employee of my company?
• How do I add the 'Timesheet Hours' column to a budget view?
• How do I add tools to my Favorites list in Procore?
• How do I add unit-based line item details in Procore's budget import template?
• How do I allow 'Standard' users to add to the Project Directory?
• How do I allow users to update the 'Percent Complete' field in the Schedule tool?
• How do I apply markups from a previous revision to a new revision?
How do I apply the site safety inspection template to a project?
How do I approve an owner’s invoice?
How do I archive and unarchive a cost code?
How do I attach multiple files at once to a transmittal?
How do I avoid and report phishing emails?
How do I bill for stored materials in Procore?
How do I build a Training Center?
How do I change a known password?
How do I change companies in Procore’s navigation bar?
How do I change my name or email address in Procore Certification?
How do I change my web browser’s default email client for mailto links?
How do I change the ‘Responsible Contractor’ field on a submittal?
How do I choose a Default Punch Item Manager for my project?
How do I configure a prefix and starting number for a project’s RFIs?
How do I configure my web browser to allow popups from Procore?
How do I configure privacy settings for a correspondence item?
How do I control which emails are sent by Procore during the RFI process?
How do I control which emails are sent by Procore from the Punch List tool?
How do I convert Procore support articles, tutorials, and FAQs into a PDF?
How do I create a billing period for an invoice?
How do I create a bookmark to Procore?
How do I create a desktop shortcut to Procore?
How do I create a fillable PDF?
How do I create a new project permission template from a Project Directory?
How do I create an allowance and/or contingency report?
How do I create or join a Zoom meeting in Procore?
How do I customize submittal responses?
How do I delete line items in approved change orders?
How do I determine the latitude and longitude values of an address?
How do I determine whether a punch list item has been sent?
How do I display a list of project dates on the Home page?
How do I download Procore’s Windows mobile application?
How do I download the Google Chrome browser?
How do I download the Mozilla Firefox browser?
How do I download Procore’s Android mobile application?
How do I download Procore’s iOS mobile application?
How do I edit a project schedule in Procore?
How do I edit an initial award amount for a contract in Portfolio Financials?
How do I enable additional workforce labor types for the Daily Log?

How do I enable Cost Allocations and Components for a Portfolio Financials project?

How do I enable retainage for a contract in Portfolio Financials?

How do I enable the DocuSign Integration?

How do I ensure that Procore emails reach the recipients?

How do I enter a credit invoice in Portfolio Financials?

How do I enter budgeted projects for the year in Portfolio Financials and Capital Planning?

How do I export a project budget from Procore to Sage 300 CRE?

How do I export cost forecast data from a Procore budget to Sage 300 CRE?

How do I filter items by multi-tiered locations?

How do I filter out 'Recycled' items from a custom RFIs report?

How do I find the project ID?

How do I get a DocuSign® account?

How do I get the latest version of Safari for Mac OS X?

How do I get the percent complete updated in the native schedule file?

How do I give users access to the Prequalifications tool?

How do I invite users and collaborators to my company's Procore account?

How do I know if an RFI that I posted in the Bid Room has been answered?

How do I know if my DocuSign account is synced with Procore?

How do I know if someone has made a change to a daily log?

How do I know if someone has downloaded a file?

How do I locate an archived project in Portfolio Financials and Capital Planning?

How do I log in to Portfolio Financials and Capital Planning?

How do I log in to Procore's Support site?

How do I log in to Procore using Okta SSO?

How do I log in to Procore's Support site?

How do I log into Procore using Microsoft Azure AD SSO?

How do I look at the Daily Log for multiple days?

How do I make my punch list items private by default?

How do I manage the storage the Procore mobile app is using on my device?

How do I mark an assignee as a required responder on an RFI?

How do I navigate Procore's tools?

How do I navigate to a Bid Room in Portfolio Financials?

How do I open an RFI as an assignee?

How do I post an idea for Procore?

How do I prepare my data for import into Procore?

How do I preserve cost code formatting in Excel?

How do I prevent commitment line item overbilling on a subcontractor invoice?
- How do I rate a page and send feedback?
- How do I remove a submitter or approver from a submittal workflow while the approval process is in progress?
- How do I remove files from Procore Sync to save storage space on my PC?
- How do I report an issue from Procore's mobile app?
- How do I request access to a custom Training Center?
- How do I reset an unknown password?
- How do I resolve a "Path too long" error in Procore Sync?
- How do I resolve a "Sync Failed" error on a project in Procore Sync?
- How do I revoke project access for a Procore user?
- How do I run a sealed bid process in Portfolio Financials?
- How do I set the accounting method for a commitment or prime contract?
- How do I set up a budget view for real-time labor productivity?
- How do I set up permissions for a correspondence type?
- How do I configure Procore for Okta SSO (SAML 2.0)?
- How do I set up Single Sign-On (SSO) with Procore?
- How do I set up the 'Procore Labor Productivity Cost' budget view?
- How do I set up a project in Procore?
- How do I setup the subcontractor invoices and payments feature for Procore + QuickBooks?
- How do I share feedback with Procore?
- How do I show historical minutes on a Meeting PDF?
- How do I sign in to Microsoft Office 365 in the Documents tool?
- How do I sign-up for Procore Certification if I do not have Procore login credentials?
- How do I stop a meeting item from carrying over to a follow-up meeting?
- How do I submit a response to a 'Draft' RFI when I am the RFI Manager?
- How do I submit change orders and invoices in Portfolio Financials?
- How do I switch between Portfolio Financials and Project Management toolkits in Procore?
- How do I test the Azure AD SSO integration before deploying it to my end users?
- How do I track non-commitment costs on a change event?
- How do I update Procore Sync?
- How do I update Procore Sync and my Microsoft .NET Framework?
- How do I update Procore Sync if the version is no longer supported?
- How do I upgrade my web browser to Internet Explorer 11?
- How do I use Procore's live chat support?
- How do I use Tags/Keywords in Procore?
- How do I use the navigation bar to go back to the Company Portfolio?
- How do I use the notification center?
- How do I verify an Australian Business Number (ABN)?
- How do I view incomplete certification or continuing education lessons?
• Should I enable the Specifications tool on my project?
• Should I integrate my Microsoft Project Schedule in Procore's web application or Procore Drive?
• Should I update my Budget View to add RFQ values to the budget?
• To whom can I assign an RFI?
• Why can't I log in to Procore?
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• What's the difference between a job, a parent job, and a sub job?
• What are App Configurations and how do I work with them?
• What are Approvals in Portfolio Financials?
• What are best practices for using multiple (phased) budget uploads?
• What are configurable fieldsets and which Procore tools support them?
• What are Cost Allocations and Components in Portfolio Financials?
• What are 'cost types' and how does our ERP integration support them?
• What are custom fields and which Procore tools support them?
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• What are Drawing Areas?
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• What are Milestone Dependencies in Portfolio Financials and how do I set them?
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• What are Procore's default cost types?
• What are Procore's standard budget views?
• What are 'production quantities'?
• What are "related items" in Procore?
• What are role-based permissions?
• What are some best practices for Reporting in Portfolio Financials and Capital Planning?
• What are some examples of reports I can generate in Portfolio Financials and Capital Planning?
• What are specifications?
• What are the blue icons in my drawings log?
• What are the budget warning banner changes?
• What are the column header updates in the import templates?
• What are the data points available for custom reports in Portfolio Financials and Capital Planning?
• What are the data points for Capital Plans in Portfolio Financials and Capital Planning?
• What are the default observation types used for?
• What are the default permission levels in Procore?
• What are the default project permissions templates in Procore?
• What are the default statuses for insurance in Procore?
• What are the default submittal responses in Procore?
• What are the default submittal statuses in Procore?
• What are the default submittal types in Procore?
• What are the differences between Procore's time modules?
• What are the different change order tiers?
• What are the different permission levels for team members in Portfolio Financials?
• What are the different RFQ statuses and how do they affect cost and change order amounts?
• What are the DocuSign fields and can I customize them?
• What are the financial line items in custom reports?
• What are the new features for Quality and Safety?
• What are the new Procore Product Categories?
• What are the threshold values for the Portfolio tool's Health Dashboard?
• What are Touch Commands?
• What are Uncategorized Invoices in Portfolio Financials?
• What data is synced between Procore and Sage 100 Contractor?
• What data is synced between Sage 300 CRE® and Procore?
• What data is synced with the Integration by Ryvit connector?
• What do bidders see when they are in the Bid Room?
• What do I do when a commitment fails to export from the ERP Integrations tool?
• What do the arrows mean on the Project Comparison tab of Portfolio Financials and Capital Planning?
• What do the dates in the project's Admin tool mean?
• What do the different DocuSign® banners in Procore mean?
• What do the different icons on my files mean in Procore Sync?
• What do the ERP icons mean?
• What do the punch item color codes on a drawing mean?
• What does each column in the 'Submittals Log' represent?
• What does each permission level mean?
• What does 'Hide Bidding Info' mean for someone on the Bid Room Team?
• What does it mean when my DocuSign account is 'synced' with my Procore account?
• What does the "Search" box in the Photos tool search for?
• What email notifications are sent for Approval Workflows in Portfolio Financials?
• What emails are sent during the bidding process in Portfolio Financials?
• What encryption standard does Procore use to protect user data?
• What fields are searched in the Directory tool?
- What fieldset configurations are recommended for configurable fieldsets?
- What file types does the Forms tool support?
- What gets copied over to a new project when applying a project template?
- What happened to 'draw requests', 'requisitions' and 'payment applications'?
- What happened to sequential and parallel approval in the submittal workflow?
- What happened to the RFIs Question and Responses Report?
- What happens if I have duplicate company records in Procore's Company Directory?
- What happens to existing submittals when 'Dynamic Approver Due Dates' is enabled?
- What happens when I share a report with another Procore user?
- What if my spec sections or divisions start in the middle of a page?
- What information is searchable using Procore Search?
- What is a budget code?
- What is a Certification Center?
- What is a change event?
- What is a change order?
- What is a construction project's schedule?
- What is a 'contact' in Procore and which project tools support the concept?
- What is a daily log?
- What is a 'Draft' RFI?
- What is a 'Draft' submittal?
- What is a drawing set?
- What is a fillable PDF?
- What is a forecasting view?
- What is a partial budget line item?
- What is a permission template?
- What is a Project Template?
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• What is sliding scale retention?
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• What is the Bid Room in Portfolio Financials?
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• What is the difference between ‘Baseline’ and ‘Forecast or Actual’ dates for milestones in Portfolio Financials?
• What is the difference between a distribution group and distribution list in Procore?
• What is the difference between a labor productivity budget view and field production report?
• What is the difference between a submitter and approver in submittals?
• What is the difference between custom fields and configurable fieldsets?
• What is the difference between horizontal and vertical financial markup on prime contract change orders?
What is the difference between personal and published drawing markups?
What is the difference between raster and vector content in PDFs?
What is the difference between SP- and IdP-Initiated SSO?
What is the difference between the Change Orders Tool and the Change Orders Subtab within the Prime Contracts and Commitments Tools?
What is the "File Rename Information" file included with my extracted project data?
What is the Financials Dashboard?
What is the maximum character length for a commitment's 'Title'?
What is the maximum character length for a commitment's 'Number (#)'?
What is the maximum character length for a 'Company Name' in the Directory tool?
What is the 'My Tasks' page in Portfolio Financials and Capital Planning?
What is the new report index page?
What is the Procore plugin and what is it used for?
What is the Project Page in Portfolio Financials and Capital Planning?
What is the Project Team in Portfolio Financials and what are the varying permission levels?
What is the Punch List Workflow?
What is the RFI Manager role?
What is the 'Schedules' folder in the Documents tool and why can't I delete it?
What is the 'Send to Accounts Payable' feature in Portfolio Financials?
What is the 'Submittal Manager' role?
What is the unpublished status on drawings?
What options are available for the Gantt chart view in the Project level Schedule tool?
What options do I have for numbering RFIs in Procore?
What permissions do I need to add users to a Procore project?
What should I do if I forgot my password for Portfolio Financials?
What should I know about Approval Workflows in Portfolio Financials?
What should I know about bidding in Portfolio Financials?
What should I know about change orders in Portfolio Financials?
What should I know about invoicing in Portfolio Financials?
What should I know about the Contract Room in Portfolio Financials?
What tabs are available in the ERP Integrations tool?
What types of correspondences can be created with the Correspondence tool?
What version of Procore Sync am I running?
What's the difference between adding an assignee to a RFI and forwarding an RFI for review?
What's the difference between Procore's People Import Template and Company Import Template?
When a Sage 300 CRE vendor is linked to a Procore company, is the address synced?
When do the download links in emails sent from Procore expire?
- When does my user session expire on Procore’s Support site?
- When does the RFIs tool send email notifications?
- When does the Submittals tool send email notifications to Procore users?
- When I import my Schedule of Values, will blank line items be imported?
- When updating the Work Log section, why can’t I see any names in my resource list?
- When will I receive emails about the project I’m bidding on in Portfolio Financials?
- Where and how does Procore store customer information?
- Where can I find the email address to send daily logs, photos, documents, and emails to Procore?
- Where can I sign up for free public trainings?
- Where did Field Productivity go in Procore?
- Where did Quality and Safety go in Procore?
- Where do I put my bid documents in Procore?
- Where do the selections in the ‘Spec Section’ drop-down list come from?
- Which Asta Powerproject file formats are supported by Procore?
- Which budget views should I add to my Procore projects?
- Which calculation method should I choose when using the Forecast to Complete feature?
- Which canned reports are available in the Company level Reports tool?
- Which cost code formats are supported by Procore + Sage 300 CRE?
- Which data columns are in a Field Production Report?
- Which data columns are included in the Budget Detail tab?
- Which data columns can I add to a custom Submittals report?
- Which data entry fields do I have permission to see when creating an RFI?
- Which domains do we add to our network’s ‘Allowed List’ to ensure access to Procore?
- Which fields can Procore automatically populate when uploading drawings?
- Which fields can Procore automatically populate when uploading specifications?
- Which fields in the Correspondence tool can be configured as required, optional, or hidden?
- Which fields in the Daily Log tool can be configured as required, optional, or hidden?
- Which fields in the Directory tool can be configured as required, optional, or hidden?
- Which fields in the Documents tool can be configured as required, optional, or hidden?
- Which fields in the Drawings tool can be configured as required, optional, or hidden?
- Which fields in the Incidents tool can be configured as required, optional, or hidden?
- Which fields in the Inspections tool can be configured as required, optional, or hidden?
- Which fields in the Observations tool can be configured as required, optional, or hidden?
- Which fields in the Punch List tool can be configured as required, optional, or hidden?
- Which fields in the RFIs tool can be configured as required, optional, or hidden?
- Which fields in the Specifications tool can be configured as required, optional, or hidden?
- Which fields in the Submittals tool can be configured as required, optional, or hidden?
- Which fields in the T&M Tickets tool can be configured as required, optional, or hidden?
- Which fields on the create or update project page can be configured as required, optional, or hidden?
- Which file formats are supported when exporting a project's submittals?
- Which filters are 'sticky' in the Submittals tool?
- Which filters are supported in the Portfolio tool's views?
- Which insurance fields in a Procore company sync with Sage 300 CRE vendors?
- Which integrated ERP systems support the 'cost type' concept?
- Which integrated ERP systems support the 'Sub Job' concept?
- Which logos appear on PDF exports in Procore?
- Which Microsoft Excel file versions can be attached to items in Procore?
- Which prime contract and PCCO fields are synced with Procore and Viewpoint Spectrum?
- Which Procore platforms support Azure AD SSO?
- Which Procore project tools support the DocuSign® integration?
- Which Procore project tools update data in the Field Production Report?
- Which Procore tools can I use to add production quantities to my project's budget?
- Which Procore tools can I use to create a change event?
- Which Procore tools support Granular Permissions?
- Which project tools support Procore Search?
- Which setting do I enable in QuickBooks® to export invoices with the ERP Integrations tool?
- Which settings are available in Procore?
- Which SSO identity providers are supported by Procore?
- Which tablet device should I purchase for using Procore?
- Which tools can I extract project data from using the Procore Extracts application?
- Which units of measure (UOM) are included on Procore's master list?
- Which versions of Microsoft Project does Procore support?
- Which weather providers are supported by Procore?
- Who can be designated as an 'Assignee' on an RFI?
- Who can I assign a task to?
- Who can view a 'Draft' RFI?
- Who gets notifications from observations?
- Who owns the data in my Procore account?
- Who receives a correspondence item email notification?
- Who receives a notification for updates in the Drawings tool?
- Who receives an email when a submittal is created or updated?
- Who receives emails about coordination issues?
- Who receives notification emails when a vendor's insurance expires?
- Why am I getting an error when downloading Procore Drive?
- Why am I having problems playing training videos?
Why am I not receiving emails from Portfolio Financials and Capital Planning?

Why am I not seeing all of my viewpoints in the viewpoints import tool?

Why am I not seeing my issues after I associate the file to my project?

Why am I receiving an error message when importing user and vendor contacts?

Why am I receiving Procore emails at night?

Why am I seeing an "Out of Sync. Admin level permission required" error in Procore Sync?

Why am I unable to delete a change order?

Why am I unable to download and open a .ZIP file from Procore?

Why am I unable to edit a change order?

Why am I unable to log in to the Procore Certification site?

Why am I unable to assign users to a RFQ?

Why are automatic drawing sheet links missing?

Why are my change order's line items being duplicated on my owner's invoice?

Why are my change order line items duplicated on my subcontractor invoice?

Why are my courses not showing up in my Procore Certification profile?

Why are my drawing comparisons failing?

Why are my drawing uploads failing?

Why are my files not syncing with Procore Sync?

Why are my specification uploads failing?

Why are my training courses missing?

Why are recent changes to my Sage database missing in Procore?

Why are some files missing after downloading from Procore Sync?

Why are some of my sub folders in my [Bid Documents] folder not showing up when my bidders download them?

Why are the status icons for Procore Sync not showing?

Why are the weather conditions not showing on my Daily Log weather log?

Why are viewpoints being created after I use the markup tools?

Why can I see the Prime Contracts tool but cannot view the Prime Contract?

Why can I view the Commitments tool but cannot see any commitments?

Why can’t I add Procore tools to my Favorites list?

Why can’t I change the weather delay or any of the boxes on that row?

Why can’t I create a change order?

Why can’t I create a follow-up meeting in the Meetings tool?

Why can’t I create or activate Procore projects?

Why can’t I delete items in Procore?

Why can’t I expand the 'Awarded Value' row in Portfolio Financials and Capital Planning?

Why can’t I export an item from Portfolio Financials and Capital Planning?

Why can’t I log in to my Certification Analytics Dashboard?
- Why can't I log in to Portfolio Financials and Capital Planning?
- Why can't I receive email from Procore?
- Why can't I see all of my Favorite tools on a project?
- Why can't I see one of my users in my Certification Analytics?
- Why can't I see the Accept/Reject options in the ERP Integrations tool?
- Why can't I see the Bid Room in Portfolio Financials?
- Why can't I see the Contract Room in Portfolio Financials?
- Why can't I see the Favorites tab in My Profile Settings?
- Why can't I see the Sync or Refresh buttons in the ERP Integrations tool?
- Why can't I turn OFF the 'Action Required' emails sent from the Submittals tool?
- Why can't I update my Procore App? (iOS)
- Why can't I use the cloud redline tool in Navisworks®?
- Why can't my team member see a project in Portfolio Financials and Capital Planning?
- Why can't my vendor access the Bid Room in Portfolio Financials?
- Why did Procore switch from procoretech.com to app.procore.com?
- Why do I need to log in to Procore's Support site?
- Why do I not have permission to view this web page?
- Why do I see an error when trying to export data to Sage 300 CRE?
- Why do some of our project's RFI numbers have two prefixes?
- What does beta mean?
- Why is it valuable to have 'Procore' as an endorsable skill on my LinkedIn profile?
- Why is my bid package missing from the Planroom?
- Why is my Certification Analytics page blank?
- Why is the Financial Health section of the Health Dashboard not configured?
- Why is my form template not loading?
- Why is the 'My Open Items' list not showing tasks that have been assigned to me?
- Why is my Procore Certified Certificate missing?
- Why is my Procore project missing from the ERP Integrations tool?
- Why is my Sage 300 CRE data not syncing?
- Why is the Add Visual button unavailable on my custom report?
- Why is the browse button missing in the Documents tool?
- Why is the delete button dimmed and not available in the Schedule tool of Procore Drive?
- Why is the percentage complete less than 100% for a Procore Certification course?
- Why is the Procore Drive desktop shortcut not working?
- Why is the Send to ERP button dimmed and not available in the Project Creation Assistant?
- Why is the Signed Contract Received Date field disabled when DocuSign is checked?
- Why isn't my model showing when viewing models in Procore?
- Why isn't my project weather working?
- Why isn't Procore Sync updating?
- Why isn't the 'Job to Date Costs' column in the budget matching our subcontractor invoice amounts?
- Why isn't the project's budget view reflecting labor costs and production quantities from timecard entries?
- Why was the "Procore Fundamentals" training course deprecated?
- Why were the "Deep-Dive Training" courses deprecated?
- Will dates from a Bid Room be added to the project's milestones in Portfolio Financials?
- Will Procore convert my non-fillable PDF to a fillable PDF?

- Procore (Français - Canada)
  - À propos du champ de gestionnaire de QRT
  - Activer l'intégration DocuSign sur un projet
  - Activer l'outil Inspections
  - Afficher les plans
  - Afficher un document
  - Afficher un échéancier de projet
  - Ajouter des modèles d'inspection du niveau de la compagnie à votre projet
  - Ajouter des procès-verbaux des réunions
  - Ajouter des types d'observation personnalisés
  - Ajouter en bloc des utilisateurs et des compagnies au répertoire du projet
  - Ajouter et modifier des codes de coût du projet
  - Ajouter et supprimer des outils de projet
  - Ajouter un commentaire à une tâche
  - Ajouter un déposant et des approbateurs au flux de travail des livrables
  - Ajouter un item de ligne à une ventilation des coûts
  - Ajouter un item relié à une inspection
  - Ajouter un nouveau projet
  - Ajouter un secteur de plans
  - Ajouter une assurance projet à une compagnie dans le répertoire du projet
  - Ajouter une personne au repertoire de la compagnie
  - Ajouter une personne au répertoire du projet
  - Ajouter une photo à une entrée de rapport journalier afin qu'elle apparaîsse dans l'outil Photos
  - Annoter un plan
  - Aperçu du rapport journalier
  - Attribuer une soumission gagnante et la convertir en contrat de sous-traitance
  - Choisir une « Réponse officielle » pour une QRT
  - Cloner un rapport de projet personnalisé
  - Comment puis-je améliorer la précision de la technologie ROC sur mes plans?
  - Comment réinitialiser un mot de passe oublié?
  -Comparer des versions de plans
Configurer les paramètres avancés : Appel d'offres
Configurer les paramètres avancés : Courriels
Configurer les paramètres avancés : Devis
Configurer les paramètres avancés : Directives
Configurer les paramètres avancés : Formulaires
Configurer les paramètres avancés : Inspections au niveau du projet
Configurer les paramètres avancés : Liste de déficiences
Configurer les paramètres avancés : Livrables
Configurer les paramètres avancés : Observations
Configurer les paramètres avancés : Ordres de changement
Configurer les paramètres avancés : Page d'accueil du projet
Configurer les paramètres avancés : Photos
Configurer les paramètres avancés : Plans
Configurer les paramètres avancés : Rapport journalier
Configurer les paramètres avancés : Réunions
Configurer les paramètres avancés : Transmissions
Configurer les paramètres avancés : Échéancier du projet
Configurer les paramètres : QRT
Configurer un budget
Configurer un modèle de projet
Configurer un nouvel affichage du budget
Consulter l'historique des modifications d'une inspection
Contacter le support
Créer un ordre de changement à l'engagement (ODCE)
Créer des demandes de prix à partir d'un événement de changement
Créer des entrées de rapport de construction journalier
Créer des entrées de rapport journalier en tant que collaborateur
Créer des réponses personnalisées aux livrables
Créer un album photo
Créer un bon de commande
Créer un contrat de sous-traitance
Créer un contrat principal
Créer un contrat principal avec DocuSign
Créer un courriel
Créer un coût direct
Créer un dossier d'appel d'offres
Créer un ensemble de devis
Créer un événement de changement
- Créer un incident
- Créer un livrable
- Créer un modèle de déficience au niveau de la compagnie
- Créer un modèle de déficience au niveau du projet
- Créer un modèle de permissions de projet à partir du répertoire de projet
- Créer un modèle de réunion
- Créer un modèle d'inspection au niveau de la compagnie
- Créer un ordre de changement à l'engagement (ODCE) avec DocuSign
- Créer un ordre de changement au contrat principal (ODCCP) avec DocuSign
- Créer un ordre de changement potentiel (ODCP)
- Créer un ordre de changement potentiel (ODCP) au contrat principal à partir d'un événement de changement
- Créer un rapport de projet personnalisé
- Créer une déficience
- Créer une demande de paiement
- Créer une demande d'ordre de changement (DODC)
- Créer une facture au nom d'un sous-traitant
- Créer une feuille de temps
- Créer une inspection au niveau du projet
- Créer une observation
- Créer une observation à partir d'une inspection
- Créer une QRT
- Créer une réunion
- Créer une réunion à partir d'un modèle
- Créer une révision de livrable
- Créer une structure de dossiers standard du projet pour l'outil Documents
- Créer un modèle d'inspection au niveau du projet
- Demander un changement d'échéancier
- Demander un formulaire personnalisé
- Demander une importation de codes de coût
- Désactiver un ensemble de comptes d'utilisateurs dans le répertoire de la compagnie
- Déverrouiller un budget
- Distribuer et redistribuer les procès-verbaux des réunions
- Distribuer un ordre du jour de réunion
- Envoyer des inspections par courriel
- Envoyer par courriel des fichiers et des dossiers à partir de l'outil Documents du projet
- Envoyer une question préalable à la soumission
- Envoyer une soumission
- Fermer une inspection

https://support.procore.com/references/sitemap
Updated: Sun, 29 Nov 2020 19:01:54 GMT
Powered by
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- Importer des coûts directs
- Importer des déficiences
- Intégration d'un échéancier Microsoft Project avec Procore Drive
- Intégration d'un échéancier Primavera P6 avec Procore Drive
- Mettre à jour les documents d'appel d'offres
- Mettre à jour un échéancier Microsoft Project dans Procore Drive
- Modifier des sections et des divisions du devis
- Modifier en bloc les livrables dans un paquet
- Modifier le responsable d'une QRT
- Modifier le statut d'une tâche
- Modifier les permissions d'un utilisateur
- Modifier un livrable
- Modifier une inspection au niveau du projet
- Pourquoi est-ce que je reçois un message d'erreur lors de l'importation des contacts?
- Publier des plans
- Puis-je changer la langue de ma compagnie, mon projet ou mon profil utilisateur dans Procore?
- Quel est l'impact de la mise à niveau du Protocole de sécurité de la couche transport v1.2 sur les utilisateurs?
- Quels formats de date sont pris en charge lors de l'importation de coûts directs à partir d'un fichier CSV?
- Quels sont les différents niveaux d'ordres de changement?
- Quels sont les niveaux de permissions par défaut dans Procore?
- Rechercher et inviter des soumissionnaires
- Récupérer une inspection de la corbeille
- Regrouper les inspections sur la page de liste
- Répondre à un livrable en tant qu'approbateur
- Répondre à une QRT
- Retirer des modèles d'inspections au niveau de la compagnie de votre projet
- Réviser et confirmer des plans
- S'abonner au registre des plans
- Signer un document avec DocuSign
- Soumettre une facture en tant que sous-traitant
- Suivre les changements des fichiers et dossiers
- Supprimer des plans
- Supprimer un item de ligne de budget
- Supprimer une inspection
- Synchroniser et télécharger des plans (iOS)
- Télécharger des documents d'appel d'offres
- Télécharger des fichiers et des dossiers
- Téléverser des devis
- Téléverser des fichiers dans un dossier
- Téléverser des photos
- Téléverser des plans
- Téléverser des révisions de plans
- Téléverser et envoyer un livrable
- Téléverser un fichier d’échéancier de projet vers l’application Web de Procore
- Transférer un livrable pour révision
- Vérifier et publier des devis

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  - Navigate Procore’s Support Site

- Getting Started Midway Through Implementation

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○ Core Connector
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    • Integration by Procore: Accept or Reject a PCCO for Export to Viewpoint® Spectrum®
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Configure the Sync Schedule for Procore and Viewpoint® Spectrum®
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Integration by Procore: Export a CCO to Viewpoint® Spectrum®
Integration by Procore: Export a Commitment to Viewpoint® Spectrum®
Integration by Procore: Export a PCCO to Viewpoint® Spectrum®
Integration by Procore: Export a Procore Budget to Viewpoint® Spectrum®
Integration by Procore: Export a Procore Company Record to Viewpoint® Spectrum®
Integration by Procore: Import a Viewpoint® Spectrum® Budget into a Procore Project
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Integration by Procore: Re-import a Viewpoint® Spectrum® Prime Contract
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Integration by Procore: Re-import a Viewpoint® Spectrum® Budget into a Procore Project
Integration by Procore: Request to Connect Procore and Viewpoint® Spectrum®
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Integration by Procore: Resend a Rejected CCO to ERP Integrations for Accounting Acceptance
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• Subcontractor
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  • General Contractor
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• Internal Project Manager / Project Engineer
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• Subcontractor
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      - Take and Add Photos to an Album with the Camera Tool (Android)
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  - Change Events (Android)
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      - Add a Line Item to a Change Event (Android)
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  - Commitments (Android)
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      - Create a Purchase Order (Android)
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• Correspondence (Android)
  • Permissions
  • Tutorials
    • Create a Correspondence Item (Android)
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• Crews (Android)
  • Tutorials
    • Add a Worker (Android)
    • Create a Crew (Android)
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• Daily Log (Android)
  • Tutorials
    • Add a Daily Log Entry (Android)
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    • Add Daily Construction Report Entries (Android)
    • Add Delay Entries (Android)
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    • Add Dumpster Entries (Android)
    • Add Equipment Entries (Android)
    • Add Inspections Entries (Android)
    • Add Manpower Entries (Android)
    • Add Notes Entries (Android)
    • Add Phone Calls Entries (Android)
    • Add Photos Entries to Daily Log (Android)
    • Add Plan Revisions Entries (Android)
    • Add Quantities Entries (Android)
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    • Add Timecard Entries (Android)
• Add Visitors Entries (Android)
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• Copy a Daily Log (Android)
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• Email a Daily Log (Android)
• Mark a Daily Log as Complete (Android)
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• Send Photos from the Photos tool to the Daily Log (Android)
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• Directory (Android)

• Tutorials
  • Add a Company to the Project Level Directory (Android)
  • Add a Contact to your Device (Android)
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  • Edit a Company in the Project Level Directory (Android)
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  • Email Forward Contact Information (Android)
  • Search for and Filter Directory Contacts (Android)
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• Permissions

• Permissions

• Documents (Android)

• Tutorials
  • Create a Folder (Android)
  • Delete Folders and Files (Android)
  • Download a File (Android)
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• Drawings (Android)

• Tutorials
- Add Measurements to a Drawing (Android)
- Add Observations to a Drawing (Android)
- Add Photos to a Drawing (Android)
- Add Punch List Items to a Drawing (Android)
- Compare Drawings (Android)
- Create RFIs on a Drawing (Android)
- Delete Drawing Markups (Android)
- Download Drawings (Android)
- Edit Drawing Markups (Android)
- Email Drawings (Android)
- Link Items to a Drawing (Android)
- Mark up a Drawing (Android)
- Print Drawings (Android)
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- Permissions

- Equipment (Android)

- Tutorials
  - Add Company Equipment Entries (Android)
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  - Add Inspections to Equipment Entries (Android)
  - Change the Status of Equipment Entries (Android)
  - Edit Equipment Entries (Android)
  - Perform Equipment Inspections (Android)
  - Remove Equipment from Site (Android)
  - Search and Filter for Equipment Entries (Android)
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- Permissions

- Forms (Android)

- Tutorials
  - Delete a Project Level Form (Android)
  - Edit a Form's Information (Android)
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- Workflow
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- Incidents (Android)
  - Tutorials
    - Add a Record to an Incident (Android)
    - Add a Witness Statement to an Incident (Android)
    - Close Incidents (Android)
    - Create Incidents (Android)
    - Edit Incidents (Android)
    - Search and Filter for Incidents (Android)
    - View Incidents (Android)
- Permissions

- Inspections (Android)
  - Tutorials
    - Add Comments to an Inspection Item (Android)
    - Add Photos to an Inspection Item (Android)
    - Add Signers to an Inspection (Android)
    - Create an Inspection (Android)
    - Create an Observation from an Inspection (Android)
    - Edit an Inspection (Android)
    - Email Inspections (Android)
    - Perform an Inspection (Android)
    - Search for and Filter Inspections (Android)
    - Sign an Inspection (Android)
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    - View Signatures on an Inspection (Android)
    - View the Activity Feed of an Inspection (Android)
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- Instructions (Android)
  - Tutorials
    - Create an Instruction (Android)
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    - Search for Instructions (Android)
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- Locations (Android)
  - Tutorials
• Add Photos to a Location (Android)
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• Create an Incident from a Location (Android)
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• Permissions

• Meetings (Android)
  • Tutorials
    • Add a Meeting Item (Android)
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    • Create a Meeting (Android)
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• Permissions

• My Time (Android)
  • Tutorials
    • Add a My Time Entry (Android)
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• Permissions

• Observations (Android)
  • Tutorials
    • Add a Comment to an Observation (Android)
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    • Email an Observation (Android)
    • Respond to an Observation (Android)
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• Photos (Android)
  • Tutorials
    • Add a Comment to a Photo (Android)
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    • Delete Photos (Android)
    • Download a Photo (Android)
    • Edit a Photo’s Information (Android)
    • Email a Photo (Android)
    • Mark Up a Photo (Android)
    • Mention Someone in a Photo Comment (Android)
    • Search for and Filter Photos (Android)
    • Sort Photo Albums (Android)
    • Take and Add Photos to an Album (Android)
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• Permissions

• Prime Contracts (Android)
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• Project Home (Android)
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  • Tutorials
    • Add Procore as a Widget on Your Android Device (Android)
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• Punch List (Android)
  • Tutorials
    • Add a Photo to a Punch List Item (Android)
    • Close a Punch List Item (Android)
    • Create a Punch List Item (Android)
    • Edit a Punch List Item (Android)
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    - Change the Status of an RFI (Android)
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- Settings: Procore Android App
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    - Email Specifications (Android)
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  - Tutorials
    - Email Submittals (Android)
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• Tutorials
  • Add a Task (Android)
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• Permissions

• Timesheets (Android)
  • Tutorials
    • Add a Crew to a Timesheet (Android)
    • Add Employees to a Timesheet (Android)
    • Add Quantities to a Timesheet (Android)
    • Bulk Enter Time Entry (Android)
    • Copy Previous Timesheet (Android)
    • Create a Timesheet (Android)
    • Delete a Timesheet (Android)
    • Edit a Timesheet (Android)
    • Edit Quantities on a Timesheet (Android)
    • Search for and Filter Timesheets (Android)
    • Sign a Timesheet (Android)
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  • Tutorials
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  - Procore for Android: Release Notes
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    - Announcements (iOS)
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    - Change Events (iOS)
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    - Commitments (iOS)
      - Tutorials
        - Create a Purchase Order (iOS)
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        - View Inclusions/Exclusions for Subcontracts (iOS)
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      - Permissions
    - Coordination Issues (iOS)
      - Permissions
- **Tutorials**
  - Add a Comment to a Coordination Issue (iOS)
  - Create or Link Coordination Issues on a Drawing (iOS)
  - Edit a Coordination Issue (iOS)
  - Search for and Filter Coordination Issues (iOS)
  - View the Activity Feed of a Coordination Issue (iOS)

- **Correspondence (iOS)**
  - **Tutorials**
    - Create a Correspondence Item (iOS)
    - Edit a Correspondence Item (iOS)
    - Respond to a Correspondence Item (iOS)
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- **Permissions**

- **Crews (iOS)**
  - **Tutorials**
    - Add a Worker (iOS)
    - Create a Crew (iOS)
    - Edit a Crew (iOS)
    - Edit a Worker (iOS)
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- **Permissions**

- **Daily Log (iOS)**
  - **Tutorials**
    - Add Accident Entries (iOS)
    - Add Daily Construction Report Entries (iOS)
    - Add Daily Log Entries (iOS)
    - Add Delay Entries (iOS)
    - Add Deliveries Entries (iOS)
    - Add Dumpster Entries (iOS)
    - Add Equipment Entries (iOS)
    - Add Inspection Entries (iOS)
    - Add Manpower Entries (iOS)
    - Add Notes Entries (iOS)
    - Add Phone Calls Entries (iOS)
    - Add Photos Entries (iOS)
    - Add Plan Revision Entries (iOS)
• Add Quantities Log Entries (iOS)
• Add Safety Violation Log Entries (iOS)
• Add Scheduled Work Entries (iOS)
• Add Timecards Entries (iOS)
• Add Visitor Entries (iOS)
• Add Waste Log Entries (iOS)
• Add Weather Log Entries (iOS)
• Copy a Daily Log Item (iOS)
• Delete a Daily Log (iOS)
• Edit a Daily Log (iOS)
• Email a Daily Log (iOS)
• Mark a Daily Log as Complete (iOS)
• Review and Approve Pending Entries (iOS)
• Send Photos from the Photos tool to the Daily Log (iOS)
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• Directory (iOS)
  • Tutorials
    • Add a Company to the Project Level Directory (iOS)
    • Add a Contact to your Device (iOS)
    • Add a Person to the Project Level Directory (iOS)
    • Add a Phone Calls Entry from the Directory (iOS)
    • Search and Filter the Directory (iOS)
    • Send Message or WhatsApp to a Contact (iOS)
    • View the Directory (iOS)
  • Permissions

• Documents (iOS)
  • Tutorials
    • Create a Folder (iOS)
    • Download a File (iOS)
    • Drag and Drop Files into Procore's Documents Tool (iOS)
    • Email Folders and Files (iOS)
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    • Search for Folders and Files (iOS)
    • Upload a File (iOS)
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• Drawings (iOS)
• Tutorials
  • Access Recently Viewed Drawings (iOS)
  • Add Measurements to a Drawing (iOS)
  • Add Observations to a Drawing (iOS)
  • Add Photos to a Drawing (iOS)
  • Add Punch List Items to a Drawing (iOS)
  • Compare Drawings (iOS)
  • Create or Link Coordination Issues on a Drawing (iOS)
  • Create RFIs on a Drawing (iOS)
  • Delete Drawing Markups (iOS)
  • Disable Push Notifications for Drawings (iOS)
  • Edit Drawing Markups (iOS)
  • Email Drawings (iOS)
  • Enable Push Notifications for Drawings (iOS)
  • Link Items to a Drawing (iOS)
  • Link Observations to a Drawing (iOS)
  • Link RFIs on a Drawing (iOS)
  • Mark Up a Drawing (iOS)
  • Print Drawings (iOS)
  • Publish Personal Drawing Markups (iOS)
  • Search for and Filter Drawings (iOS)
  • Share a Snapshot of a Drawing Comparison (iOS)
  • Sync and Download Drawings (iOS)
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• Permissions

• Equipment (iOS)
  • Tutorials
    • Add Company Equipment Entries (iOS)
    • Add Equipment Entries (iOS)
    • Add Inspections to Equipment Entries (iOS)
    • Change the Status of Equipment Entries (iOS)
    • Edit Equipment Entries (iOS)
    • Perform Equipment Inspections (iOS)
    • Remove Equipment from Site (iOS)
    • Search and Filter for Equipment Entries (iOS)
    • View Equipment Entries (iOS)

• Permissions
- **Forms (iOS)**
  - Tutorials
    - Delete a Project Level Form (iOS)
    - Download Form Templates (iOS)
    - Edit a Form's Information (iOS)
    - Email a Form (iOS)
    - Fill out a Form (iOS)
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  - FAQ
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- **Incidents (iOS)**
  - Tutorials
    - Add a Record to an Incident (iOS)
    - Add a Witness Statement to an Incident (iOS)
    - Add an Action to an Incident (iOS)
    - Close Incidents (iOS)
    - Create Incidents (iOS)
    - Edit Incidents (iOS)
    - Search and Filter for Incidents (iOS)
    - View Incidents (iOS)
  - Permissions

- **Inspections (iOS)**
  - Tutorials
    - Add Comments to an Inspection Item (iOS)
    - Add Photos to an Inspection Item (iOS)
    - Add Signers to an Inspection (iOS)
    - Create an Inspection (iOS)
    - Create an Observation from an Inspection (iOS)
    - Create Inspections on a Drawing (iOS)
    - Edit an Inspection (iOS)
    - Email Inspections (iOS)
    - Perform an Inspection (iOS)
    - Search for and Filter Inspections (iOS)
    - Sign an Inspection (iOS)
    - View Signatures on an Inspection (iOS)
    - View the Activity Feed of an Inspection (iOS)
  - Permissions
• **Instructions (iOS)**
  - Tutorials
    - Create an Instruction (iOS)
    - Delete an Instruction (iOS)
    - Edit an Instruction (iOS)
    - Search for and Filter Instructions (iOS)
    - View Instructions (iOS)
  - Permissions

• **Locations (iOS)**
  - Permissions
  - Tutorials
    - Add Photos to a Location (iOS)
    - Create a Punch List Item from a Location (iOS)
    - Create an Incident from a Location (iOS)
    - Create an Inspection from a Location (iOS)
    - Create an Observation from a Location (iOS)
    - Create an RFI from a Location (iOS)
    - Scan a QR Code in the Locations Tool (iOS)
    - View Items Associated with a Location (iOS)

• **Meetings (iOS)**
  - Tutorials
    - Add a Meeting Item (iOS)
    - Add Meeting Minutes (iOS)
    - Convert a Meeting from Agenda to Minutes (iOS)
    - Create a Meeting (iOS)
    - Edit a Meeting (iOS)
    - Edit a Meeting Item (iOS)
    - Search for a Meeting (iOS)
    - Take Attendance for a Meeting (iOS)
    - View a Meeting (iOS)
  - Permissions

• **Models (iOS)**
  - Tutorials
    - Create Coordination Issues from a Model (iOS)
    - Create Observations from a Model (iOS)
    - Download or Remove Models from a Device (iOS)
    - Measure Distances on a Model (iOS)
    - Settings: Models (iOS)
- View Models (iOS)
- Permissions
- My Time (iOS)
  - Tutorials
    - Add a My Time Entry (iOS)
    - Clock Your Time (iOS)
    - Edit a My Time Entry (iOS)
    - Search for and Filter My Time Entries (iOS)
    - View My Time Entries (iOS)
- Permissions
- Observations (iOS)
  - Tutorials
    - Add a Comment to an Observation (iOS)
    - Add Observations to a Drawing (iOS)
    - Close an Observation (iOS)
    - Create an Observation from an Inspection (iOS)
    - Create an Observation (iOS)
    - Download Observation Items (iOS)
    - Edit an Observation (iOS)
    - Email an Observation (iOS)
    - Link Observations to a Drawing (iOS)
    - Respond to an Observation (iOS)
    - Search for and Filter Observations (iOS)
- Permissions
- Photos (iOS)
  - Tutorials
    - Add a Comment to a Photo (iOS)
    - Add a Location to a Photo (iOS)
    - Add Photos to a Drawing (iOS)
    - Bulk Edit Photos (iOS)
    - Create a Photo Album (iOS)
    - Delete Photos (iOS)
    - Download a Photo (iOS)
    - Drag and Drop Images into Procore's Photos Tool (iOS)
    - Edit a Photo's Information (iOS)
    - Email a Photo (iOS)
    - Mark Up a Photo (iOS)
    - Mention Someone in a Photo Comment (iOS)
- Search for and Filter Photos (iOS)
- Send Photos from the Photos tool to the Daily Log (iOS)
- Sort Photo Albums (iOS)
- Take and Add Photos to an Album (iOS)
- View Photos (iOS)
- Permissions

- Prime Contracts (iOS)
  - Tutorials
  - View a Prime Contract (iOS)
  - Permissions

- Project Dashboard (iOS)
  - Permissions
  - Tutorials
    - Configure the Tool Grid (iOS)
    - Navigate to a Different Company in Procore (iOS)
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    - View the Project Dashboard (iOS)

- Punch List (iOS)
  - Tutorials
    - Add a Photo to a Punch List Item (iOS)
    - Close a Punch List Item (iOS)
    - Create a Punch List Item (iOS)
    - Download Punch List Items (iOS)
    - Edit a Punch List Item (iOS)
    - Reassign a Punch List Item (iOS)
    - Respond to a Punch List Item (iOS)
    - Search and Filter the Punch List (iOS)
    - Send Punch List Items (iOS)
    - View a Punch List Item (iOS)
  - Permissions

- RFI (iOS)
  - Tutorials
    - Change the Status of an RFI (iOS)
    - Create a Change Event from an RFI (iOS)
    - Create an RFI (iOS)
    - Create RFIs on a Drawing (iOS)
    - Download RFI Attachments (iOS)
    - Edit an RFI (iOS)
- Email an RFI (iOS)
- Link RFIs to a Drawing (iOS)
- Mark an RFI Response as Official (iOS)
- Respond to an RFI (iOS)
- Search for and Filter RFIs (iOS)
- View RFIs (iOS)

- Permissions

- Schedule (iOS)
  - Tutorials
    - Search and Filter the Schedule (iOS)
    - Update the Percent Complete for a Schedule Task (iOS)
    - View Schedule Task Details (iOS)
  - Permissions

- Settings: Procore iOS App

- Specifications (iOS)
  - Tutorials
    - Email Specifications (iOS)
    - Search Contextually within Specifications (iOS)
    - Search for Specifications (iOS)
    - View Specifications (iOS)
  - Permissions

- Submittals (iOS)
  - Tutorials
    - Download Submittals Attachments (iOS)
    - Download Submittals (iOS)
    - Email Submittals (iOS)
    - Scan a Submittal QR Code (iOS)
    - Search for and Filter Submittals (iOS)
    - View a Submittal (iOS)
  - Permissions

- Tasks (iOS)
  - Tutorials
    - Add a Task (iOS)
    - Add Comments to a Task (iOS)
    - Change the Status of a Task (iOS)
    - Delete a Task (iOS)
    - Edit a Task (iOS)
    - Search for and Filter Tasks (iOS)
• Send Tasks (iOS)
• View Tasks (iOS)
• Permissions

• Timesheets (iOS)
• Permissions

• Tutorials
  • Add a Crew to a Timesheet (iOS)
  • Add Employees to a Timesheet (iOS)
  • Add Quantities to a Timesheet (iOS)
  • Bulk Enter Time Entry (iOS)
  • Copy Previous Timesheet (iOS)
  • Create a Timesheet (iOS)
  • Delete a Timesheet (iOS)
  • Edit a Timesheet (iOS)
  • Edit Quantities on a Timesheet (iOS)
  • Search for and Filter Timesheets (iOS)
  • Sign a Timesheet (iOS)
  • Sign Timesheets for All Projects (iOS)
  • View a Labor Budget to Actual Report (iOS)
  • View a Timesheet (iOS)
  • View Field Production Report (iOS)
  • View Timesheets for All Projects (iOS)

• T&M Tickets (iOS)
  • Tutorials
    • Create a T&M Ticket (iOS)
    • Create Equipment from a T&M Ticket (iOS)
    • Edit a T&M Ticket (iOS)
    • Email a T&M Ticket (iOS)
    • Search and Filter T&M Tickets (iOS)
    • Sign a T&M Ticket (iOS)
    • View a T&M Ticket (iOS)
  • Permissions

• Update the Procore iOS App
  • Training Videos
  • Permissions
  • Procore for iOS: Release Notes
    • 2014
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  ○ Procore for iOS: Troubleshooting Tips
• Product Releases
  ○ Changes by Tool
    • Platform Announcements
      • 2016
        • End of Support for Internet Explorer 9 & 10
      • 2017
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  ○ Coming Soon
    • Mobile: Field Updates to the Announcements Tool on iOS
  ○ Monthly Webinar
  ○ New Releases
    • 2019
      • Action Plans: (Coming Soon!) New Project Level Action Plans Tool
      • Admin: App Management Metrics
      • Admin: New Configurable Fieldsets for the T&M Tickets Tool
      • Admin: Configurable PDFs added to Inspections Tool
      • Admin: (Coming Soon!) Custom Fields and Custom Sections for Submittals Tool
      • Admin: Custom Fields for Incidents Tool
      • Admin: Custom Fields for Inspections Tool
      • Admin: (Coming Soon!) Default Project Stages
      • Admin: Delete Custom Fields
      • Admin: New Project Level Language Selection
      • Admin: Observation Type Custom Translations
      • Bidding: New! "TBD" Option for Bid Due Date
      • Change Events: Removed Sidebar from Change Events Tool
      • Change Events: Visual Redesign of Change Events Tool on the Procore Mobile App
      • Commitments: Removed Sidebar from Commitments Tool
      • Commitments: Sliding Scale Retention Now Available in All Countries
      • Company Timesheets: New Bulk Actions Menu Options & Improved Pagination
      • Coordination Issues: Activity Feed on List View Side Panel
      • Coordination Issues: New Integration with the Models Web Viewer
      • Coordination Issues: Link Issues to Drawing Markups
• Correspondence: New! Project Level Correspondence Tool
• Directory: (Coming Soon!) Company Level Granular Permissions for Viewing and Managing Directory Information
• Documents: Create Custom Fields
• Drawings and Specifications: Configurable Fieldsets and Custom Fields
• Drawings: Sync Drawings by Discipline on the Procore Mobile App
• Drawings: Updated Markup Toolbar
• ERP Integrations: Import Sage 300 CRE Tax Groups into Procore
• ERP Integrations: Export Subcontractor Invoices to Sage 300 CRE®
• ERP Integrations: Unlink CCOs Synced with Sage 100 Contractor
• Billed Rate Transactions with Sage 300 CRE®
• Forms: New Company and Project Level Empty States View
• Incidents: Body Parts Diagram Now Available on Mobile
• Incidents: Body Diagram Added to 'Body Parts Affected' Menu
• Incidents: New Options in 'Body Parts Affected' Drop-Down Menu
• Inspections: New Company and Project Level Empty States View
• Integrations: (Coming Soon) Deprecation of Tableau Web Data Connector
• Invoice Management: New Status Cards & Data Columns in the Invoicing Tool
• Meetings: GoToMeeting Integration
• Schedule: New Design and User Experience for Schedule Tool on Mobile
• Models: Import Viewpoints into the Web Viewer
• Models: Measure Shortest Distance Between Objects
• Models: New Hotkey Navigation on Web Viewer
• Models: See Collaborators in Real-Time Within a Model
• My Profile Settings: New User Level Language Selection
• My Time: Geofence Clock In & Out Reminders
• Observations: Create Fieldsets from the Observations Tool
• Permissions: New Company Level Permissions Templates
• Photos: Delete Photos from the Photo Tool's Recycle Bin
• Portfolio Financials: Link Projects and Share Users Between Portfolio Financials and Project Management
• Prequalifications: Create and Edit Custom Prequalification Questions
• Procore Analytics: Q2 2020 Releases
• Procore Analytics: Q3 2020 Releases
• Procore Android App: No Longer Providing Updates for Android 6.0 and Earlier
• Procore for iOS: Create and Link Coordination Issues in the Drawings Tool
• Procore iOS App: No Longer Providing Updates for iOS 12
• Project Financials: Advanced Forecasting for the Budget Tool
• Project Financials: New Budget Detail Tab in the Budget Tool
- Project Financials: New 'Procore Labor Productivity Cost' Budget View
- Quality and Safety: Fields Updated on iOS, Android, and Web
- Reports: New Project Roles Report
- Reports: Updated Quality and Safety Reporting Fields
- Project Home: New! Request Apps from App Marketplace
- RFIs: New Granular Permission to Act as RFI Manager
- Schedule: Lookaheads Coming Soon to Procore Schedule Tool
- Schedule: Update Percent Complete for Schedule Tasks Using the Mobile App
- Procore: Search for Items Within a Project
- Submittals: (Coming Soon!) New Markup Tools for Submittal PDF Attachments
- Timesheets: Added Description Field
- Timesheets: Apply Rounding Rules to Employee Timesheets
- Timesheets: New! Export Timecard Entries into Sage 300 CRE®
- Timesheets: New! Split Timecard Hours & New Time Type Columns
- T&M Tickets: New! Project Level Time & Materials Tickets Tool
- Windows 10 App: (Coming Soon!) End of Support for Windows 10 App

**Quarterly Releases**

**Weekly Release Notes**

- Release Notes for 2017-12-04
- Release Notes for 2017-12-11
- Release Notes for 2017-12-18
- Release Notes for 2017-12-22
- Release Notes for 2018-01-02
- Release Notes for 2018-01-08
- Release Notes for 2018-01-16
- Release Notes for 2018-01-23
- Release Notes for 2018-01-29
- Release Notes for 2018-02-04
- Release Notes for 2018-02-05
- Release Notes for 2018-02-12
- Release Notes for 2018-02-20
- Release Notes for 2018-02-26
- Release Notes for 2018-03-05
- Release Notes for 2018-03-12
- Release Notes for 2018-03-19
- Release Notes for 2018-03-26
- Release Notes for 2018-04-02
- Release Notes for 2018-04-09
- Release Notes for 2019-01-07
- Release Notes for 2019-01-14
- Release Notes for 2019-01-21
- Release Notes for 2019-01-28
- Release Notes for 2019-02-11
- Release Notes for 2019-02-19
- Release Notes for 2019-02-25
- Release Notes for 2019-03-04
- Release Notes for 2019-03-11
- Release Notes for 2019-03-18
- Release Notes for 2019-03-25
- Release Notes for 2019-04-01
- Release Notes for 2019-04-08
- Release Notes for 2019-04-15
- Release Notes for 2019-04-22
- Release Notes for 2019-04-29
- Release Notes for 2019-05-06
- Release Notes for 2019-05-13
- Release Notes 2019-05-20
- Release Notes for 2019-05-28
- Release Notes for 2019-06-03
- Release Notes for 2019-06-10
- Release Notes for 2019-06-17
- Release Notes for 2019-06-24
- Release Notes for 2019-07-01
- Release Notes for 2019-07-08
- Release Notes for 2019-07-15
- Release Notes for 2019-07-22
- Release Notes for 2019-07-29
- Release Notes for 2019-08-05
- Release Notes for 2019-08-12
- Release Notes for 2019-08-19
- Release Notes for 2019-08-26
- Release Notes for 2019-09-04
- Release Notes for 2019-09-09
- Release Notes for 2019-09-16
- Release Notes for 2019-09-23
- Release Notes for 2019-09-30
- Release Notes for 2020-07-20
- Release Notes for 2020-07-27
- Release Notes for 2020-08-03
- Release Notes for 2020-08-10
- Release Notes for 2020-08-17
- Release Notes for 2020-08-24
- Release Notes for 2020-08-31
- Release Notes for 2020-09-07
- Release Notes for 2020-09-21
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- Release Notes for 2020-10-05
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- Release Notes for 2020-10-19
- Release Notes for 2020-10-26
- Release Notes for 2020-11-02
- Release Notes for 2020-11-09
- Release Notes for 2020-11-16
- Release Notes for 2020-11-23

- **Products**
  - Procore Web (app.procore.com)
    - Procore Custom Solutions
      - Custom Fields
        - Custom Solutions: FAQ on Custom Fields
        - Get Started with Custom Fields from the Custom Solutions Team
      - Custom Forms
        - Custom Forms: FAQ
        - Get Started with Custom Forms
      - Portfolio Financials: Request Services from Custom Solutions
      - Request Services from Custom Solutions
    - Custom Tools
      - Custom Tools: FAQ
      - Get Started with Custom Tools
    - Custom Workflows
      - Custom Workflows: FAQ
      - Get Started with Custom Workflows
  - Financial Tools User Guide
  - Procore Consulting Services
    - Request Procore Consulting Services
▪ What can Procore's Field Productivity Consultation Package include?
▪ What can Procore's Financial Consultation Package include?
▪ What can Procore's Preconstruction Consultation Package include?
▪ What can Procore's Project Management Consultation Package include?
▪ What can Procore's Quality & Safety Consultation Package include?

▪ Procore User Guide
  ▪ Company Level
    ▪ Admin
      ▪ FAQ
      ▪ Permissions
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  ▪ Tutorials
    ▪ About Configured Incidents Fieldsets and Field Options
    ▪ Add a Classification
    ▪ Add a Custom Bid Type
    ▪ Add a Custom Department
    ▪ Add a Custom Owner Type
    ▪ Add a Custom Project Region
    ▪ Add a Custom Project Role
    ▪ Add a Custom Project Stage
    ▪ Add a Custom Project Type
    ▪ Add a Custom Trade
    ▪ Add a Job to Date Costs Column to a Budget View
    ▪ Add an Office Location
    ▪ Add Company Level Observation Types
    ▪ Add Custom Options for Incident Fields
    ▪ Add Custom Translations to Observation Types
    ▪ Add, Edit, and Delete Company Cost Codes
    ▪ Add New Project Dates
    ▪ Add Root Cause Analysis Fields
    ▪ Add Task Categories
    ▪ Add the Columns for Job Cost Transaction Syncing to a Budget View for ERP Integrations
- Add the 'ERP Direct Costs' Column to a Procore Budget View for ERP Integrations
- View App Management Metrics
- Allow User Installs
- Apply Configurable Fieldsets to Projects
- Assign a Budget View to a Procore Project
- Configure Administrative Settings: Company Admin
- Configure Advanced Settings: Company Admin
- Configure Alerts and Severity for Incidents
- Configure Cost Code Preferences for ERP Integrations
- Configure Meeting Templates
- Configure Project Settings from the Company Admin Tool
- Configure Service Account Permissions
- Configure Settings for Exporting Inspections as PDFs
- Configure Single Sign On in the Company Admin Tool
- Configure Tax Code Settings
- Configure Your Company Settings
- Create a Company Level Form Template
- Create a Company Level Observation Template
- Create a Company Level Punch Item Template
- Create a Default Project Fieldset
- Create a Meeting Template
- Create a New Expense Allocation
- Create a Quick Punch Category at the Company Level
- Create an App Configuration and Apply it to Projects
- Create Custom Sections
- Create Custom Submittal Log Statuses
- Create Custom Submittal Types
- Create New Configurable Fieldsets
- Create New Custom Fields
- Create a Service Account
- Delete a Budget View
- Delete a Company Level Form Template
- Delete a Company Level Observation Template
- Delete a Company Level Punch Item Template
- Delete a Custom Trade
- Delete a Meeting Template
- Delete a Quick Punch Category at the Company Level
- Delete an Office Location
- Delete an App Configuration
- Delete Configurable Fieldsets
- Delete Custom Fields
- Delete Custom Options for Incident Fields
- Delete Observation Types
- Delete Root Cause Analysis Fields
- Delete a Service Account
- Delete Task Categories
- Edit a Meeting Template
- Edit a Quick Punch Category at the Company Level
- Edit an Existing Budget View
- Edit an Office Location
- Edit an App Configuration
- Edit Configurable Fieldsets
- Edit Custom Options for Incident Fields
- Edit Observation Types
- Edit Root Cause Analysis Fields
- Enable Avatars
- Enable Participation in Procore User Surveys
- Enable SD Storage
- Enable Security Settings for Logins, Passwords, and Session Timeout Intervals
- Enable the DocuSign® Integration on Your Company’s Procore Account
- Export Company Cost Codes
- Import Cost Codes to Procore
- Import Two-Level Cost Codes to the Company Admin Tool
- Import Multi-Level Cost Codes to the Company Admin Tool
- Install a Custom App
- Install an App from the App Marketplace
- Manage App Install Requests
- Mark a Task Category as Inactive
- Mark an Observation Type as Inactive
- Modify a Service Account
- Reinstall an App
- Remove Configurable Fieldsets from Projects
- Remove Custom Fields from Configurable Fieldsets
- Reset the Client Secret for a Service Account
- Add, Modify, or Delete a Service Account
- Set Default Cost Types
- Set the Default Change Management Configurations
- Set the Default Company Bidding Configuration
- Set the Defaults for Your Projects
- Set Up a Budget View for Custom Reporting
- Set up a New Budget View
- Set Up a New Forecasting View
- Set Up the Procore Labor Productivity Cost Budget View
- Uninstall an App
- Update a Unit of Measure on the Unit of Measure Master List
- Update an Installed App
- Update the Employer Identification Number for Your Company's Procore Account
- Update the Tool Settings for Contracts
- Upload a Company Logo
- Upload an Office Logo
- View Account Information
- View API Request Metrics
- View Information about an Installed App
- View Projects with App Configurations
- View the Certification Dashboard

- **Directory**
  - FAQ
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  - Tutorials
    - Add a Company to the Company Directory
    - Add a Distribution Group to the Company Directory
    - Add a User Account to the Company Directory
    - Add an Existing User to Projects in Your Company's Procore Account
    - Add Insurance to a Company Record in the Company Directory
    - Allow Users to Create New Projects
    - Assign a Project Permissions Template to a User in the Company Directory
    - Change a User's Project Permissions Template in the Company Directory
    - Configure Advanced Settings: Company Directory
- Customize the Column Display in the Directory Tool
- Delete a Distribution Group from the Company Directory
- Designate an Insurance Manager for Your Procore Company
- Download a vCard for a User Account in the Company Directory
- Download the Company or User Import Template
- Edit a Company in the Company Directory
- Edit a Contact in the Company Directory
- Edit a Distribution Group in the Company Directory
- Edit a User Account in the Company Directory
- Export the Company Directory to CSV or PDF
- Inactivate a Batch of Companies in the Company Directory
- Inactivate a Batch of User Accounts in the Company Directory
- Inactivate a Company in the Company Directory
- Inactivate a Contact in the Company Directory
- Invite a Batch of Procore Users to Join a Company's Procore Account
- Invite or Re-invite a User to Procore
- How to Log in to Procore Web (app.procore.com)
- Merge Companies
- Perform Bulk Actions on the Company Directory
- Reactivate a Batch of Companies in the Company Directory
- Reactivate a Batch of User Accounts in the Company Directory
- Reactivate a Company in the Company Directory
- Reactivate a Contact in the Company Directory
- Reactivate a User in the Company Directory
- Remove an Existing User from Projects in Your Company's Procore Account
- Remove Company Insurance
- Request Company and People Imports
- Respond to a 'Welcome to Procore' Email
- Search and Filter the Company Directory
- Send a Company or User Import Template to Procore
- Set Bidder Information at the Company Level
- Switch Between Views in the Company Directory
- Unlock a User Account in the Company Directory
- Update Expiring Insurance for a Vendor in the Company Directory
- Update the Company Import Template
- Update the User Import Template

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Tutorials

Add or Edit a File Description in the Company Level Documents Tool
Check Files In or Out in the Company Level Documents Tool
Configure Advanced Settings: Company Documents
Create a New Folder in the Company Level Documents Tool
Delete Files and Folders in the Company Level Documents Tool
Download a Previous Version of a File in the Company Level Documents Tool
Download Files and Folders from the Company Level Documents Tool
Email Files or Folders from the Company Level Documents Tool
Export Information from the Company Level Documents Tool
Manage File and Folder Tracking in the Company Level Documents Tool
Manage Permissions for Company Level Documents
Open and Edit a File in Microsoft Office 365 Using the Company Level Documents Tool
Rename a File in the Company Level Documents Tool
Rename a Folder in the Company Level Documents Tool
Retrieve Files and Folders from the Company Level Documents Tool's Recycle Bin
Search for and Filter Company Level Documents
Upload a New Version of a File in the Company Level Documents Tool
Upload Files or Folders to the Company Level Documents Tool
View Documents in the Company Level Documents Tool

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Tutorials

Add a Project Log to a Company Level Equipment Entry
Configure Advanced Settings: Company Level Equipment Tool
Create a Company Level Equipment Entry
- Customize the Column Display in the Company Level Equipment Tool
- Delete a Company Level Equipment Category or Type
- Delete a Company Level Equipment Entry
- Delete a Company Level Equipment Make or Model
- Edit a Company Level Equipment Category or Type
- Edit a Company Level Equipment Entry
- Edit a Company Level Equipment Make or Model
- Import Company Owned Equipment
- Perform Bulk Actions in the Company Level Equipment Tool
- Prepare Company Owned Equipment for Import
- Retrieve a Company Level Equipment Entry from the Recycle Bin
- Search and Filter Company Level Equipment Entries
- Set Up Default Equipment
- View a Company Level Equipment Entry
- View the Change History of a Company Level Equipment Entry

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- Tutorials
  - Accept or Reject a CCO for Export to an Integrated ERP System
  - Accept or Reject a Company for Export to the ERP Integrations Tool
  - Archive an Integrated ERP System Vendor in Procore
  - Assign Default Cost Types To Cost Codes
  - Configure ERP Integrations Settings
  - Export Subcontractor Invoices to an Integrated ERP System
  - Link a Vendor from an Integrated ERP System with a Procore Company
  - Request to Enable the ERP Integrations Tool
  - Restore an Archived Vendor for ERP Integrations
  - Retrieve a Budget from ERP Integrations Before Acceptance
  - Unlink CCOs Synced with an Integrated ERP System
  - Unlink Commitments Synced with an Integrated ERP System
  - View the Accountant Report
- View the Archived Vendors List for an Integrated ERP System

- **Inspections**
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- **Tutorials**
  - Add Multiple Response Sets to a Company Level Inspection Template
  - Clone a Company Level Inspection Template
  - Configure Advanced Settings: Company Level Inspections
  - Create a Company Level Inspection Template
  - Create a Multiple Response Set for Inspections
  - Create an Inspection Type
  - Delete a Company Level Inspection Template
  - Delete an Inspection Type
  - Edit a Company Level Inspection Template
  - Edit a Multiple Response Set for Inspections
  - Export Company Level Inspection Templates as a PDF
  - Search and Filter for Inspection Templates
  - View the Change History of an Inspection Template

- **Permissions**
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- **Tutorials**
  - Assign Company Permissions Templates in the Permissions Tool
  - Assign Default Project Permissions Templates in the Permissions Tool
  - Create a Company Permissions Template
  - Create a Project Permissions Template
  - Delete a Company Permissions Template
  - Delete a Project Permissions Template
  - Download a Project Permissions Template Assignment Export (CSV)
  - Duplicate a Project Permissions Template
  - Edit a Company Permissions Template

https://support.procore.com/references/sitemap
Updated: Sun, 29 Nov 2020 19:01:54 GMT
Powered by 98
▪ Edit a Project Permissions Template
▪ Export Project Permissions Templates to PDF
▪ Grant Granular Permissions in a Project Permissions Template
▪ Manage Project Permissions Templates
▪ Rename a Company Permissions Template
▪ Rename a Project Permissions Template
▪ Search for and Filter Users in the Permissions Tool

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    ▪ Add Favorites to the Company Tools Menu
    ▪ Add Filters to the Portfolio Views
    ▪ Apply a Project Template to a New Project
    ▪ Change Your Login ID Email Address for Your Procore User Account
    ▪ Change Your Password
    ▪ Configure a Project Template
    ▪ Configure Advanced Settings: Portfolio
- Configure the Add Filter Options for the Portfolio Tool
- Create a New Project
- Create Custom Portfolio Reports
- Edit a Project Template
- Export a List of Projects from the Company Portfolio
- Export Your 'My Open Items’ List for a Company Account
- Navigate to a Favorite Tool
- Revoke Access for My Connected Apps
- Search the Company Portfolio for Projects
- Set and Apply Favorites for the Project Tools Menu
- Set the Dashboard View Permissions
- Set User Permissions for the Portfolio Tool
- Set Up and Manage Your Favorites
- Show Portfolio Projects in Map View
- Switch Between Financial Views
- Switch Between the Portfolio Views
- Switch Between Views in the Projects List
- Track Important Project Dates
- Upload Your Avatar or Profile Photo to Procore
- View Inactive Projects in the Company Portfolio
- View My Open Items in the Portfolio Tool
- View the Executive Dashboard in the Portfolio Tool
- View the Health Dashboard in the Portfolio Tool

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    - Edit a Prequalification Form via the Prequalification Portal
    - Respond to a Prequalification Change Request
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    - View a Prequalification Form

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  - Add a Comment on a Prequalification Form
  - Assign a Prequalification Primary Contact
  - Bulk Invite Companies to Prequalify
  - Configure Advanced Settings: Prequalifications
  - Create a Change Request for a Prequalification Form
  - Create a Custom Prequalification Question
  - Customize the Column Display in the Prequalification Tool
  - Delete a Comment on a Prequalification Form
  - Edit a Custom Prequalification Question
  - Edit the Prequalification Form
  - Filter Prequalification Forms
  - Invite a Company to Prequalify
  - Preview the Prequalification Form
  - Review a Submitted Prequalification Form
  - Set the Status on a Prequalification Form
  - View a Comment on a Prequalification Form
  - View a Company’s Prequalification Information
  - View the Change History of a Prequalification Form
  - View the Prequalification Company List
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- Duplicate Your Company’s Timesheets in Bulk
- Edit a Time Entry in the Company Level Timesheets Tool
- Edit Your Company’s Timesheets in Bulk
- Export a Timer List as an IIF file from QuickBooks® Desktop
- Export Time Entries from Procore to Import into QuickBooks® Desktop
- Export Time Entries from the Company Level Timesheets Tool to CSV
- Export Timesheet Data from Procore into Sage 300 CRE®
- Import Procore Time Entries into QuickBooks® Desktop
- Perform Bulk Approval Actions in the Company Level Timesheets Tool
- Reallocate Time to New Timecards on the Company Timesheets Tool
- Search and Filter Time Entries in the Company Level Timesheets Tool
- Set the Rounding Rule for Your Company Timesheets
- Set Up your Payroll Export for use with Sage 300 CRE®
- Transfer Procore Time Entries to QuickBooks® Desktop
- Unapprove a Time Entry in the Company Level Timesheets Tool
- View a Time Entry in the Company Level Timesheets Tool

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    - Approve an Action Plan to be Performed
    - Create Action Plan Types
    - Create Action Plan Verification Methods
    - Create an Action Plan
    - Create an Action Plan Template
    - Delete Action Plan Types
    - Delete Action Plan Verification Methods
    - Edit an Action Plan
    - Enable the Action Plans Tool
    - Perform an Action Plan
    - Search for and Filter Action Plans
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  - Add a Sub Job to a Procore Project
  - Add and Edit Project Cost Codes
  - Add and Remove Project Tools
  - Add Equipment
  - Add Tiered Locations to a Project
  - Add Spec Sections to the Admin Tool
  - Allow or Disallow Users to Create Locations within a Tool
  - Assign an Office Location to a Project
  - Change a Project's Stage of Construction
  - Change a Project's Status to Active or Inactive
  - Change Cost Code Description at the Project Level
  - Change the Name of a Procore Project
  - Change the Project Address
  - Close Out a Project
  - Configure Settings: Project Admin
  - Copy Your Company's Standard Cost Codes to a Project
  - Copy Directory From One Project to Another
  - Delete Budgeted Labor Hours and Budgeted Production Quantities for the Timesheets Tool
  - Delete Tiered Locations from a Project
  - Delete Project Cost Codes
  - Delete Spec Sections from the Admin Tool
  - Download the Procore Plugin to Import Locations from Revit®
  - Edit a Sub Job in a Procore Project
  - Edit Tiered Locations
  - Edit Project Bidding Configuration
  - Edit Spec Sections in the Admin Tool
  - Enable ERP Billed Rate Transaction Syncing on a Procore Project
  - Enable ERP Job Cost Transaction Syncing on a Procore Project
  - Enable or Disable the DocuSign® Integration on a Procore Project
  - Enable Sub Jobs
- Enable the Labor Productivity Cost Features for Project Financials
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