Portfolio Financials and Capital Planning: FAQ

Below is an alphabetical list of FAQs related to Portfolio Financials and Capital Planning in Procore.

Tip
To view the FAQs for a specific tool, click the tool name in the User Guide and refer to the FAQ tab.

- Can I customize the project type options in Portfolio Financials and Capital Planning?
- Can I edit my change order or invoice in Portfolio Financials?
- Can I include deducts in my bid submission in the Bid Room?
- Can I print or export a copy of my bid in the Bid Room?
- Can I receive a daily activity summary for Portfolio Financials and Capital Planning?
- Do milestones in Portfolio Financials sync with my external project schedule?
- How can I add custom Cost Tracker templates in Portfolio Financials?
- How can I add custom bid form templates for the Bid Room in Portfolio Financials?
- How can I budget individual values within a cost item in Portfolio Financials?
- 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 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 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 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 unaward a bid or contract in Portfolio Financials?
- How can bidders get locked out of a sealed Bid Room in Portfolio Financials?
- How do Cash Flow Forecasts and Capital Plans interact in Portfolio Financials and Capital Planning?
- How do I add a building to my account in Portfolio Financials?
- How do I add additional contacts to a vendor profile in Portfolio Financials?
- How do I edit an initial award amount for a contract in Portfolio Financials?
- 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 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 know if an RFI that I posted in the Bid Room has been answered?
• 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 navigate to a Bid Room in Portfolio Financials?
• How do I run a sealed bid process in Portfolio Financials?
• 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 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 change order approvals work in Portfolio Financials?
• How do contract approvals work in Portfolio Financials?
• How do invoice approvals work in Portfolio Financials?
• What are Approvals in Portfolio Financials?
• What are Cost Allocations and Components in Portfolio Financials?
• What are Milestone Dependencies in Portfolio Financials and how do I set them?
• What are Uncategorized Invoices in Portfolio Financials?
• 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 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 different permission levels for team members in Portfolio Financials?
• What do bidders see when they are in the Bid Room?
• What do the arrows mean on the Project Comparison tab of Portfolio Financials and Capital Planning?
• What does 'Hide Bidding Info' mean for someone on the Bid Room Team?
• What email notifications are sent for Approval Workflows in Portfolio Financials?
• What emails are sent during the bidding process in Portfolio Financials?
• What is Portfolio Financials?
• What is Procore Community?
• What is Project Cost Reporting in Portfolio Financials?
• What is the 'Adjustments' section on a bid form in the Bid Room?
• What is the 'My Tasks' page in Portfolio Financials and Capital Planning?
• What is the 'Send to Accounts Payable' feature in Portfolio Financials?
• What is the Bid Room in Portfolio Financials?
• What is the Contract Room in Portfolio Financials?
• 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 difference between 'Baseline' and 'Forecast or Actual' dates for milestones in Portfolio Financials?
• 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?
• When will I receive emails about the project I'm bidding on in Portfolio Financials?
• Why am I not receiving emails from Portfolio Financials and Capital Planning?
• 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 Portfolio Financials and Capital Planning?
• 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 my team member see a project in Portfolio Financials and Capital Planning?
• Why can't my vendor access the Bid Room in Portfolio Financials?
• Will dates from a Bid Room be added to the project's milestones in Portfolio Financials?