

PROCORE'S MOBILE TOOLKIT WEBINAR: APRIL 2023

Question & Answer

** If you have a question that is not answered in this doc, please contact our support team via chat or call : +1 (833) 277-6267*

Question	Answer
How come you cant respond to submittals in Procore iphone app? Or a I missing something?	Right now, you can only view the workflow on mobile. Most submittal reviews historically need a larger screen for document reviewing. However, we are hearing a growing need to be able to respond on mobile. Perhaps this will change in the future.
Is it possible to draw a mark-up on a drawing, and share it with others through Procore without publishing it, and without just sending a snapshot of said drawing	Yes, hit the square with the up arrow on a drawing and you have a few options to send the drawing to someone else.
How do you make QR codes for punchlist?	QR codes are made in the locations tool. Go to the project > Admin > locations. This is where you manage your locations for the project.
Hi! Is there a way to see TRANSMITTALS in the mobile app?	No. However, the Correspondence tool is pretty flexible and feature rich and can match 99% of what transmittals can do and it shows on mobile and is reportable. Have you tried using that?
Can you add users from the Company Directory via the mobile?	Not at this time, but please submit that idea/vote on it.
Why dont photos taken in the T&M, RFI or other areas land in the Photo Album? Seems like the only photos that land in the photo album must originate from the "camera" app or the daily log....	Great question. For now, emailed photos, drawings, Daily Log, punch, observations, inspections and action plans have the ability to land in the photos tool, photo album. Those settings are controlled in Photos > config settings at the tool level. I'll let the team know about T+M and RFIs. Make sure to vote on a UV as well.
can a mobile phone user add a location to a project?	This will depend on the settings of the Locations tool in the project.
can you share all the questions and answers throughout this training session?	Yes! I will include this in my follow up email :)
Does the My Tools preference get fed into new projects the user is added to?	Great question. It does not, but this is a great idea. However, one consideration is people may have a slightly different role on a project and we may not want to hide tools right out of the gate. However, I do see the value here.
No rush on this but for submittals, is there a way we can see old revisions on the phone app?	Yes. However, I ususally tell people to apply the filter "only see current revisions" Perhaps that filter is on for you.

Where do we turn on the T&M tickets tool?	Hey! You may not have access to it if you do not have the right product package. Reach out to your procore admin.
the main screen preferences are project specific. Is there a way to have those preferences automatically set for all projects?	Not today, but I really like that idea.
Is there a way to make the My Tools Filter work across all Projects? Or do you need to filter for every Project.	Same answer as before. Not today, but, love the idea.
is procore working on allowing granular permissions for "field" guys to be able to create their own locations & not need an Admin level permission to do this?	We specifically tell people to not allow people to add them on the fly to standardize the locations. Otherwise we find 10 locations with the same name spelled 5 different ways.
it would be helpful to use a cursor with crosshairs or more noticable icon, its hard to see whats being clicked on	Thanks for the feedback! We will make sure to include in future episodes
How to you clear the cache in the mobile app to improve project load times	settings > Storage > manage storage on mobile
Yeah, we have correspondance but to the best of my knowledge those are not numerical/sequential. The owner requests Transmittals be used for all communications and visibility in the mobile app would be very helpful.	Correspondence can be sequential and you could name them Trans - 1, Trans - 2 and could be organized as such, has their own permissions, reportable, mobile ready, etc, etc. https://support.procore.com/products/online/user-guide/project-level/correspondence/tutorials/getting-started-correspondence
so you are saying that if the Location settings are set correctly, and you have permissions, a user can add a location from the mobile app without having to access procore through the web?	I know they can on the web application via the location picked with the setting unchecked. I would need to triple check on mobile.
can we simplify the dashboard for field guys? if they dont need to see overdue RFI's or submittals but only tasks, observations, deficiencies?	Love the idea. I am seeing a lot of personalization themes.
sorry - if you adjust your homepage with reformatting which modules show up, does that affect every project or only the project the modifications are done in?	just the project you are on
Is it possible to measure, draw, notate on the drawings in the app?	yes, you can measure, draw and notate on the drawings. Use the toolbar in the drawings tool.
CAN SEVERAL PLANS BE OPEN AT THE SAME TIME?	technically no on mobile but they should be downloaded to your device and you can navigate between them pretty easily. Also, you can

	compare drawings and overlay them on mobile.
Is there a standard drawing template that architects can use to make the drawing more "Searchable" in Procore? I have found that some of my drawings will work with the search bar while other sets do not.	https://en-au.support.procore.com/faq/what-is-the-difference-between-raster-and-vector-content-in-pdfs . Yes. MAKE SURE THEY ARE VECTOR PDF
Drawings - When I markup a drawing in the mobile app, will everybody else in the project directory be able to see my markups?	if they have access to the drawing tool, read only or above. and the markup is published. yes!
Hi - Is there a way to add electrical (HVAC, Plumbing,etc.) symbols, cut, paste, rotate options and remove lines in drawing markups?	You could free hand draw it but we do not have added custom symbols at this point in time.
How did he attach a drawing detail to a drawing?	if you have a piece of markup it will ask you what type of an attachment do you want rfi, submittal, document etc.
when you book mark a drawing it only takes you to that drawing, not that drawing with in the set. Is there a way to bookmark a place in the drawing set to be able to start from	Not yet, but I have been pushing the team to do this. A decision was made to cycle through the bookmarks as opposed to the set.
Is there a max on bookmarks	yes, 24
when using different colors on making notes and such, is there colors associated to certain trades or areas of constructions?	I would say whatever your company standard is or whatever you agree to as a project team.
is conversations a new tool?	Yes! Conversations is new and currently in open beta. Please work with your company admin to opt in!
Do bookmarks follow the latest version or stay with the version they were created?	for drawings it goes to the current drawing. I would imagine the others would follow suit but would need to triple check
With bookmarks. Can you group them? For instance bookmark these drawings for reference to the pool stuff, but a separate group for one's bookmarked for pavilions. Instead of having a bunch all in one and still opening everyone trying to find that parts pages	No grouping as of today.
When you pull up drawings and you make changes with pen or highlighter can you remove any changes later?	yes, if you have the right permissions.
is there a way we can set our reordering of	No, and you can only do it for yourself. But, I love the idea.

the tools as a template so its always reordered that way on all jobs?	
Do you have an anticipated timeframe on when Quick Capture will be available for Observations on Android?	That should be out within the next month or so!
Do all users have the conversation option? I am on the mobile app, not a tablet and still see "announcements"	Conversations is currently in open beta. Please contact your company admin to opt in!
how do you do the dark mode again	https://www.procore.com/whats-new/en/save-your-battery-and-your-eye-sight-with-dark-mode-on-mobile?role=s_UZXGPRip1440%3Bs_hXnFhuVN1455
Is the photo tool the same as quick capture?	As of right now, Quick Capture is separate from the photos tool!
schedule doesnt show on my dashboard - is this because I have not set up MS Project or is it driven by Procore tasks ?	Yes, you'll need to upload a schedule to see it on mobile
Can you do dark mode on the web?	Not at this time!
1. How do we add contractors to directory without a QR Code when in field	In the directory you would use the Add Company button to add the company, then the Add Contact to build a user profile to add to a company.
Grouping of bookmarks would be great, especially if you could send bookmark groups to new team members	This is great feedback! If you can, please submit to feedback.procore.com so it is tracked and others can vote on it :)
Do you need to be on the project to send a comverstion?	Yes, as of right now, conversations happen at a project level.
2 Can we edit default tools across all my projects at once - we work on 135- 150 small projects at a time	Not at this time, but I would highly recommend adjusting your project template.
cant find that conversation tab in settings	You likely are not opted into the open beta. Please contact your company admin to opt in!
Do conversations become part of the project documentation or are they private	All conversations become a part of a project. Direct Messages and group messages are only visible to those within the message (and the company admin), however item conversations are visible to all that have access to the item being talked about
Will conversations eventaully be made printable or be able to attach to corresponence, RFI and/or change events?	At this time, conversations can be exported (and printed) by the company admin!
Can we adjust our preferences for all projects and not adjust individually?	At this time, preferences are per project. However, this is a great idea and recommend submitting this feedback on feedback.procore.com

<p>How can we modify scheduling within the Mobile App ? Modifying the existing Scheduling has been the biggest issues within our company.</p>	<p>At this time, schedules can be modified in the web version of Proocre or in the native schedule, for more details, please review this support article. In the mean time, please be sure to post your idea and consider leveraging the Conversations to share schedule concerns with your team.</p>
<p>Can you access the company level from mobile app?</p>	<p>At this time, the mobile app supports project level use, please be sure to submit your request for company level access in the Post an Idea feature.</p>
<p>are locations only available on the project level or can you set company level locations?</p>	<p>Correct, locations are only available at the project level.</p>
<p>Android with the most recent version of Procore does not appear to have the share option and does not appear to have the "last" option to go back to the previous drawing. Can you post a screenshot?</p>	<p>Currently, sharing on drawing is only available on iOS, but will be available for Android in a month or so!</p>
<p>How do you erase or edit markups on drawings?</p>	<p>For more details on editing or erasing markups, please review this support article.</p>
<p>i am missing the quick capture option? Is it only IOS and not android?</p>	<p>Great question, and no, the good news is that Quick Capture is available for iOS and Android, for more details please review this Support Article.</p>
<p>Regarding the exchange of documentation, I am particularly interested in the process of tool box talk documentation. This typically involves the project manager disseminating the tool box talk to the site manager, who then conducts the talk with the fitters on site and compiles the relevant information. This information is subsequently returned to the project manager, who uploads it onto a shared platform. Could Procore facilitate this workflow?</p>	<p>Great question! This can be handled in many different ways in Procore, but the most frequently used tools are the Correspondence or Forms tools.</p>
<p>I like how that plan view drawing was linked to a section view. I wish I could link a drawing to a drawing.</p>	<p>Great to hear, also, you can add your own drawing links if the links are not automatically added for you in the upload process (https://support.procore.com/products/online/user-guide/project-level/drawings/tutorials/add-a-link-to-a-drawing)</p>
<p>Can you cover the search tool within the daily log. I've had issues with this in the past when I am trying to reference something that happened in the past</p>	<p>Here are the two support articles for the Search feature iOS(https://support.procore.com/procore-mobile-ios/user-guide/project-search-ios/tutorials/search-for-items-within-a-project-ios) and Android(https://support.procore.com/procore-mobile-android/user-guide/project-search-android). If the issue you had seemed like a bug, please be sure to contact our Support team so they can document it and notify</p>

	our team.
QR Codes. Yes we need to know how to set up.	Here's the link to the support article for adding locations (https://support.procore.com/products/online/user-guide/project-level/admin/tutorials/add-multi-tiered-locations-to-a-project), and here's the link for creating the QR Codes (https://support.procore.com/products/online/user-guide/project-level/admin/tutorials/generate-and-print-qr-codes-for-locations)
Has anyone reported problems saving observations in the field since the new update?	If you are having issues with the mobile app, please review the following support article and use the Report an Issue feature in the app Settings.
how do i find the observations tool?	If your company has access to the Observations tool and you have permissions to see the tool, it should be present when viewing any of your projects where the tool is active.
Anywhere I can store a QR company safety manual in Procore for subcontractors?	If your safety manual is going to be included on every project, it would be beneficial to add it to your Documents tool in the Project Template so it can carryover to new projects.
Is there a way to customize the T&M to allow for calculations? Would like to calculate quantities total per item not a total of all disparate items on the T&M.	Not at this time, but you could leverage the the Workforce Management dataset in Enhanced Reporting to help with the calculations. Please be sure to submit the idea in the Post an Idea feature on the web so we can see how many others would like the same enhancement and share it with our product team.
Is there a plan to add the bookmark functionality to FORMS?	Not at this time, please submit your request via the Post an Idea feature.
Unable to click on a detail in mobile and jump to drawing sheet	Please be sure to submit issues to our Support team view the Report Issue feature within the Settings tab of the mobile app.
I can bookmark a purchase order but not a contract.	Please be sure to submit your request for this functionality via the Post an Idea feature in the web version of Procore.
QR CODES to access forms	Please share more details about your request via the Post an Idea feature.
searched my entire account and do not see how to create qr codes	QR Codes for locations and submittals are generated on the web, while your user QR code can be found within the Directory tool.
How did they attach the QR code to the submittal; do you attach it while you're creating the submittal?	QR Codes for submittals can be added when viewing submittals on the web, for more details, please follow the steps in this support article .
Hi everybody What are the Tickets? and How can I take measure in the drawings?	T&M Tickets are used by teams to record the labor, materials, equipment, and subcontractors leveraged complete work on a project; please review this support article for more details.

<p>(re: location permission) how do we put granular permissions for Project Admin area to show just locations for specific people? I talked with Support and they said it wasn't able to be done that way?</p>	<p>Thank you for reaching out to support, that is the best first step. We do not have a GP for allowing someone to only access the Locations portion of the Admin tool, but an Admin can follow this support article to allow other users to create locations in the locations field across the tools. https://support.procore.com/products/online/user-guide/project-level/admin/tutorials/allow-or-disallow-users-to-create-locations-within-a-tool</p>
<p>Is there a way to scroll through drawings after clicking recent drawings?</p>	<p>That is a great idea! Not available at this time, but please be sure to submit the idea via the Post an Idea feature.</p>
<p>Could there be a "Repeater Tool" thus when we are using the measuring tool, we do not have to keep selecting the tool ea</p>	<p>That is a great idea! Please be sure to submit the idea so we can be sure it is documented and shared with our teams.</p>
<p>please explain calibration on drawings and what that means</p>	<p>The calibration tool within Drawings can be used to establish the the dimensions of the drawing and create take offs on that sheet.</p>
<p>Can we send out a company level announcement? A weather event might impact several jobsites at once, for example.</p>	<p>The Conversations tool can be accessed in both the company and project levels, as well as the web and mobile app, but separates conversations per project, for more details, please review this support article. Even though the tool groups Conversations by project, it is still very easy to group message an entire project team when needed.</p>
<p>What is Coordination Issues tool? i dont see that on my mobile Procore?</p>	<p>The Coordination Issues tool is used to create and track issues within a project Model. https://support.procore.com/products/online/user-guide/project-level/coordination-issues</p>
<p>Will there ever be QR codes for RFIs? since RFIs deal with an exact location it would be very useful.</p>	<p>The locations field can be present in the RFI tool, and when leveraged, would be revealed in the locations tool when the location QR code is scanned. For now, each RFI does not have a QR of its own, but if you see value in that, please be sure to submit the idea on the web via the Post an Idea feature.</p>
<p>Is there a way to customize the QR codes to size? Specifically, I would like to have a QR and a room detail that allows people to see what that room type should look like.</p>	<p>There are two size options for QR codes for the project locations, for more details, please review this support article.</p>
<p>Can you label your photos when taking pictures through Daily Logs?</p>	<p>There is a lot that can be done to photos when adding them to the Daily Log, like pinning it to a drawing or tagging a location. Curious to hear more about your labels request, please know that the photos can be categorized into albums as well.</p>
<p>Will you all be adding a GPS coordinate stamping feature to the camer app?</p>	<p>This has been discussed however, we have not implemented this yet. Please submit your feedback to feedback.procore.com</p>
<p>Does the mobile support approving workflows? Such as approving an invoice</p>	<p>This is a release that is acutally in the works. We hope to have this functionality out by EOY!</p>

though a workflow	
Do you need to have certain rights to be able to get to settings?	This will be determined by the settings you are referring to, but to access the Settings in the mobile app, no, you simply need to have the mobile app.
towards the beginning, Dave showed how to access the site map and contacts. I believe it was "info" selection? I missed how to do that	To access the Info tab in the mobile app, please tap on the Dashboard tool, then select the Info tab adjacent to the Home tab.
also how do you link an RFI to the drawing?	To link a RFI to a drawing, simply add or select a markup, then click the link button to either create a RFI or select an existing RFI to be linked. https://support.procore.com/products/online/user-guide/project-level/drawings/tutorials/link-items-on-a-drawing
For specialty contractors, when will we have the option to enter our typical material used as a drop down option to speed up the process when creating T&M Tickets?	We do not currently have a material database connected to T&M, but do support custom fields in the tool that could help with this process. If you would like a more robust offering, please be sure to submit your request via the Post an Idea feature in the web version of Procore.
Are there any plans to get a Mobile app for MS Windows to use with a Microsoft Surface.	We previously had a Microsoft app, but usage was very low. Please be sure to submit the request for a Microsoft app via the Post an Idea feature in the web version of the app.
How to share the whole drawing to people without Procore, with the mark out on that?	When viewing a drawing, simply click the share button, then select Email Snapshot; with your email tool set up, you can email the snapshot to any email address.
what about QR codes for people?	When you receive the recording, you will find a review of the User QR codes towards the beginning of the webinar. In short, while in the Directory tool in the mobile app, you can tap on the QR icon to either be scanned or scan another to add them to the call.
How do we obtain QR codes?	While in the Directory tool in the mobile app, you can tap on the QR icon to either be scanned or scan another to add them to the call. If you are looking for QR codes for locations, please access these resources Here's the link to the support article for adding locations (https://support.procore.com/products/online/user-guide/project-level/admin/tutorials/add-multi-tiered-locations-to-a-project), and here's the link for creating the QR Codes (https://support.procore.com/products/online/user-guide/project-level/admin/tutorials/generate-and-print-qr-codes-for-locations)
Can you CC others when using the Conversation tool?	Within the Conversations tool you have the ability to use Direct Messages for single or multiple users as well as Group messages.
Do you have any best practices or suggestions on how to fill out daily log?	Yes, but that might be a better conversation for a follow up webinar or a special session with your team. If you are interested in the latter, please

	be sure to contact your Procore POC.
Can we do video punchlist from mobile?	Yes, if you have enabled Quick Capture, that is the most efficient way to create your punch list. iOS Android
Thnak you Adrian . Can we create items from the office?	Yes, items can be created on the web version of the tools as well as the mobile app.
Can Procore combined two print of a building an make it one print, so it can be layered?	Yes, the drawing comparison feature will allow you to compare two drawings and share the comparison if needed. Support Article
Is there a reason why only 5 sections of the daily log can be set to collaborator only? What's the reason we can't set the other fields to CO?	Yes, the other log items were not created to accept Collaborator entries, if you would like that to be considered, please be sure to submit the idea to see how many others would like the same functionality.
Will there be an update on the mark up tools to make it a little better such as a polygon highlight feature? Maybe a call out feature or maybe an eraser tool instead of deleting everything to start over?	Yes, we are always looking for ways to enhance our tools, to be sure we hear your requests, please use the Post an Idea feature so we can document and share the requests.
I'm assuming your using Apple app for the DEMO cuz it looks nothing likethe androing version	Yes, we were using the iOS app during the training, for a detailed user guide, please use this link for Android specific support .
Can you bookmark a commitment?	Yes, you can book mark Commitments, for more details, please review the desired support article. iOS and Android
Can one Calibrate without measurements on the drawings? Calibrate by scale	Yes, you can calibrate without measurements, but you would still need to know a measurement or have a scale to leverage in order to do so, no way currently to only enter the scale of the drawing.
Is it possible to overlay procore drawings on a desktop? I am able to on my iphone/ipad but I am unable to on my windows laptop	Yes, you can overlay drawings in the mobile app as well as the web version of Proocre. For more details on drawing comparisons on the web, please review this support article .
how can you assign a photo 'punch list item' to a spot on the floor plan?	Yes, you can use the markups tool in the Drawings tool to pin Punch Items to the drawing so team members know where to find the punch item, photo, observation, quick capture item, or coordination issue.
Can you CC others when using the Conversation tool?	You cannot CC someone in a Conversation, but you can create a multi user Direct Message or Group message in Conversations.