

Commercial Lending- Procorem FAQ

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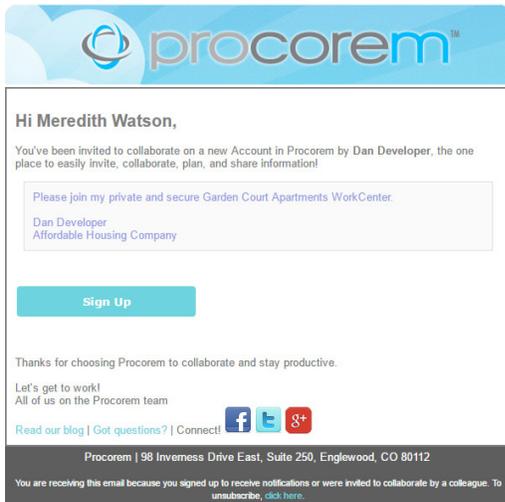
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Q: What do I do when I receive an email from the WorkCenter that looks like notifications@mail.procorem.com?

A: Click “Sign Up”. Enter your First Name, Last Name, and create a Password. Read the Terms and Conditions and then agree and click “Sign Up Now”. Navigate to all your projects WorkCenter by clicking View All WorkCenters on the left-side of the screen. Click on the name of the WorkCenter you would like to enter.

Q: I want to sign up at Procorem.com

A: If you were invited to join Procorem, you likely received an invitation email that looks like this:



To get started using Procorem, simply select the “Sign Up” button in the email which will prompt you to confirm your name and email as well as create a password for the account. The create account screen will look like this:



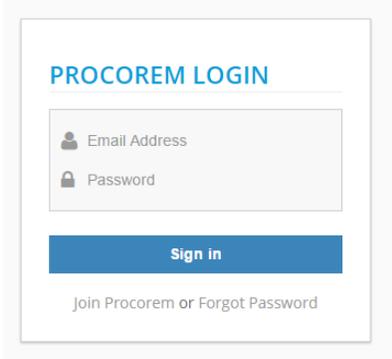
Procorem Note: When you are invited to Procorem, you will begin receiving notification emails to keep you aware of project activity. If you have not yet created an account and click on a notification email, you will be prompted to first create an account before you can log in to Procorem. Check out our [Notifications in Procorem](#) page for more information on Procorem notifications.



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Q: How do I log in?

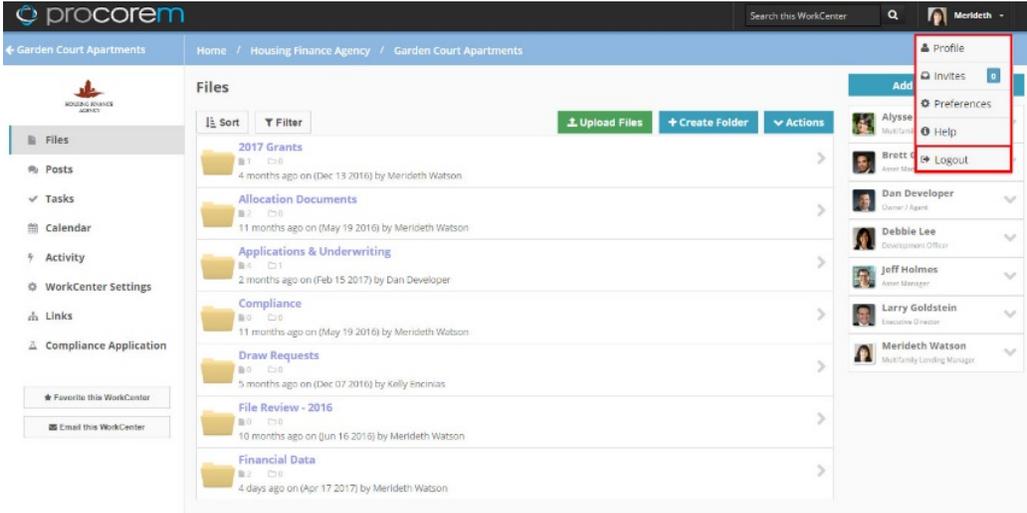
A: To log in to Procorem, visit <https://app.procorem.com> or www.procorem.com and select “Log In” on the upper right of the screen. The login screen will look like this:



Once on the login screen, simply enter your email address to log into Procorem.

Q: How do I log out?

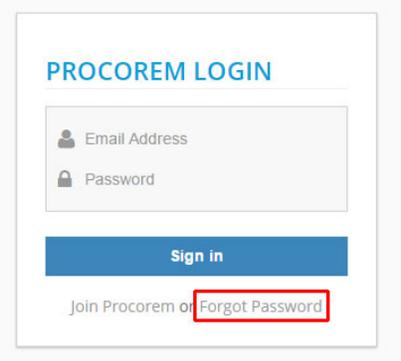
A: To log out of Procorem, select your profile picture on the upper right of the screen then click “Logout”.



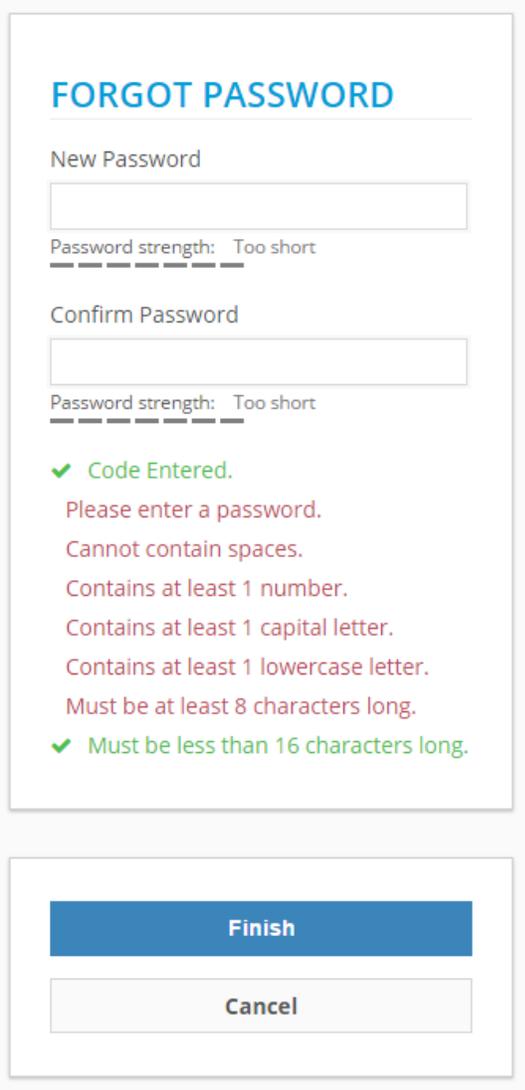
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Q: How do I reset my password?

A: If you forgot your password to Procorem, head to the login page and select the “Forgot Password” link.



Once selected, you will be asked to provide your email address which will send you an email prompting you to reset your password. Select “Forgot Password” in the email and you will be guided to the following page:



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Once you enter and confirm your new password, you will automatically be entered into Procorem.

Q: What is a WorkCenter?

A: WorkCenters roll up directly to accounts. For every account, you can have an unlimited number of WorkCenters. Think of WorkCenters as a secure, online space which allows users to store, share and collaborate on work. WorkCenters typically represent a project, team, or property. Within WorkCenters, you can invite different collaborators, assign unique security privileges, upload documents, assign tasks, comment, and instant message as well as monitor activity across the WorkCenter.

Q: How do I add a post to a WorkCenter?

A: In Procorem, Posts and Comments are used to communicate important project activity to team members. Posts can be made on the WorkCenter, Document and Task level. All Posts and Comments are recorded in Procorem for later reference and are fully integrated with each user's email system to ensure everyone stays on the same page. To make a post on the WorkCenter level, head to the WorkCenter and select the "Posts" link from the left-hand navigation menu. A text field will appear for you to type in your message. When you are finished, click the blue "Create Post" button. You will see a green message confirming your post was added.

Q: Who can see what I do or post in Procorem?

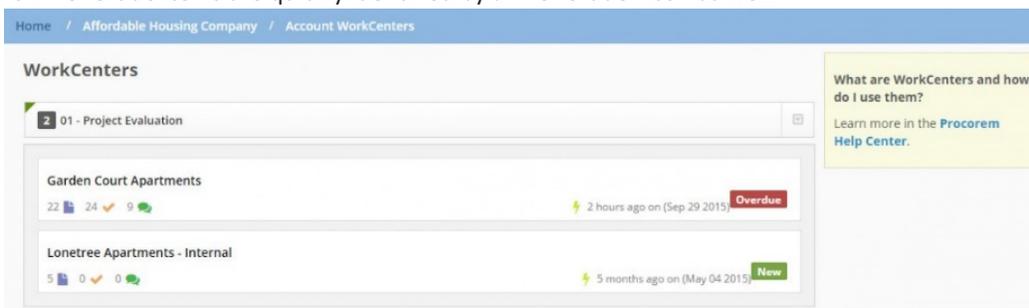
A: When you post a message, upload or download a file, assign a task, or do anything in Procorem, the only people who can see it are those who are invited into your WorkCenter. Account Administrators can see anything that goes on in a Procorem Account. To learn more on WorkCenter capabilities, review the [WorkCenter Introduction](#).

Q: What is a Collaborator?

A: A collaborator is a person whom you have invited into one of your WorkCenters. Collaborators can see all the information on the WorkCenter but can be provided customized security settings to control how they interact with the information stored on the WorkCenter. Typical rights of collaborators include the ability to read posts, uploaded documents, add posts, download files, and complete assigned tasks. If a collaborator no longer needs access to the WorkCenter, he or she can be removed by the owner.

Q: How can I see what is new in an account?

A: Click on the account name on the left side bar. A list of WorkCenters, by categories, will be displayed. If there is a green triangle in the upper left corner of a category, it means there is new content. Click to expand the category, and the WorkCenter(s) with new activity will display a "New" icon in on the right side of the WorkCenter row. Overdue items are quickly identified by an "Overdue" icon as well.



Next, type the new file name into the "File Name" field, then click the "Save" button.



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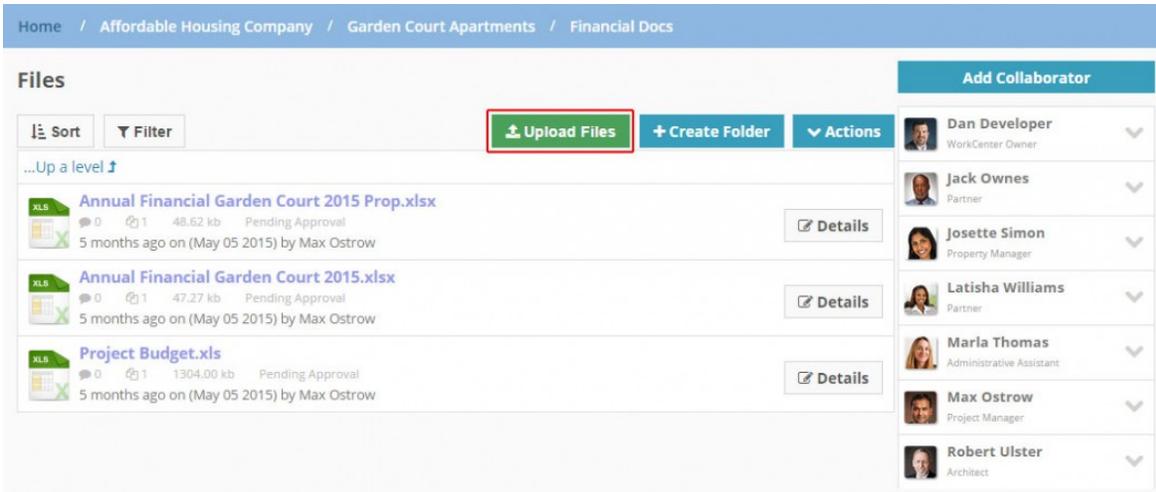
Q: How do I know if I am an admin, a member, or a guest on an Account?

A: Head to your Home page and then select “My Accounts”. Here you will see a list of all the accounts to which you are associated, as well as your membership and security level in each one listed in the bottom left-hand corner of the Account.



Q: How do I upload a document?

A: Once you are in the appropriate WorkCenter, click the green upload button in the middle of the screen. Click the “Choose File” button. Select the updated file that you want to upload, then click the “Upload” button.



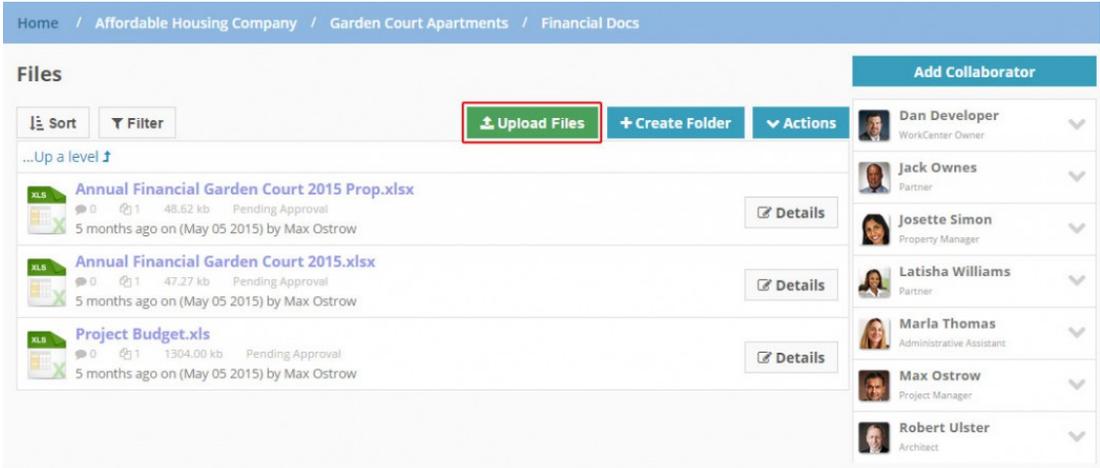
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Q: How do I download a document?

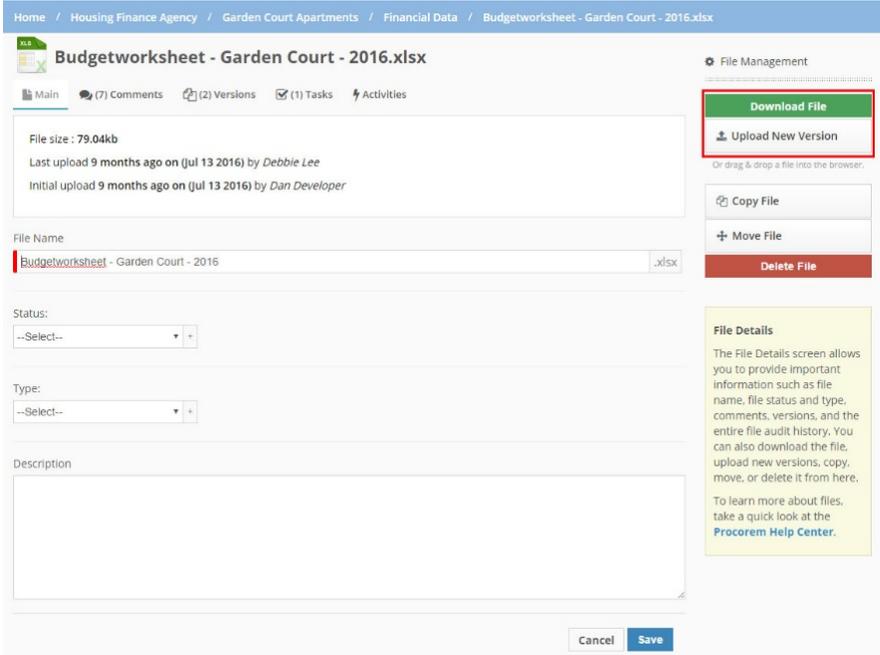
A: To download a document from one of your WorkCenters, navigate to the WorkCenter storing the file you would like to download. Select the file, then simply click on the file. It will automatically download to your computer.

Q: How can I upload a new version of a file that is already in my WorkCenter?

A: Once you are in the appropriate WorkCenter, click the green upload button in the middle of the screen. Click the “Choose File” button. Select the updated file that you want to upload, then click the “Upload” button.



You can also upload new versions right from the file details screen.



Procorem will automatically save the updated document as a new version of the old one.



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Procorem Note: The file name of the updated document must match the file name of the original version already loaded into Procorem for versioning to occur.

Q: How do I edit a document I uploaded?

A: Navigate through the folder pathway to where the document is uploaded. Select the document you would like to edit to download. Select Details to change the File Name, Status, Type, Description or Delete the file.

The screenshot shows the Procorem interface for a file named "Budgetworksheet - Garden Court - 2016.xlsx". The breadcrumb trail is: Home / Housing Finance Agency / Garden Court Apartments / Financial Data / Budgetworksheet - Garden Court - 2016.xlsx. The file is in "Pending Approval" status. The interface includes a "File Management" sidebar with buttons for "Download File", "Upload New Version", "Copy File", "Move File", and "Delete File". Below the file name, there are tabs for "Main", "Comments (7)", "Versions (2)", "Tasks (2)", and "Activities". A "New comment:" text area is visible with a "Post Comment" button. A list of comments follows, including one from Debbie Lee (Apr 04 2017) stating "This budget is finalized and approved.", one from Merideth Watson (Feb 27 2017) stating "I just updated the name.", one from Dan Developer (Dec 09 2016) asking "Hi Alysee, would Friday at 11 AM work to walk through the draft operating budget?", and one from Alysse Sanders (Dec 09 2016) asking "Dan, we have a few questions on the operating budget for Garden Court, what is your availability for a conference call this Friday?". A "File Details" section on the right explains that this screen allows for providing important information such as file name, status, type, comments, versions, and the entire file audit history. It also mentions that users can download the file, upload new versions, copy, move, or delete it from here. A link to the "Procorem Help Center" is provided for more information.

Q: How do I comment on a file or document?

A: To add a comment to a document or task in Procorem, simply head to the document or task you would like to comment on and navigate to the "Comments" tab on the top of the page. From there you can easily make new comments to post around that document or task.

Q: Can I rename a document that is already in a WorkCenter?

A: Yes. First head into the WorkCenter with the file and then select the File Details button.

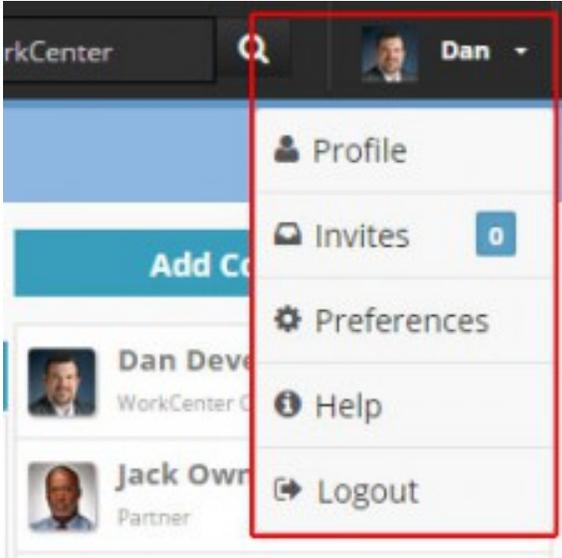
The screenshot shows a file card for "Market Analysis.xls". The card displays the file icon, name, and metadata: 4 comments, 2 versions, 2636.00 kb, and "Pending Approval". It also shows the upload date and user: "a month ago on (Jul 19 2015) by Max Ostrow". A red-bordered button labeled "Details" is highlighted in the bottom right corner of the card.

Q: How do I edit my Procorem profile?

A: Click the drop-down arrow located next to your name in the upper right-hand corner of your screen. Select "Profile."



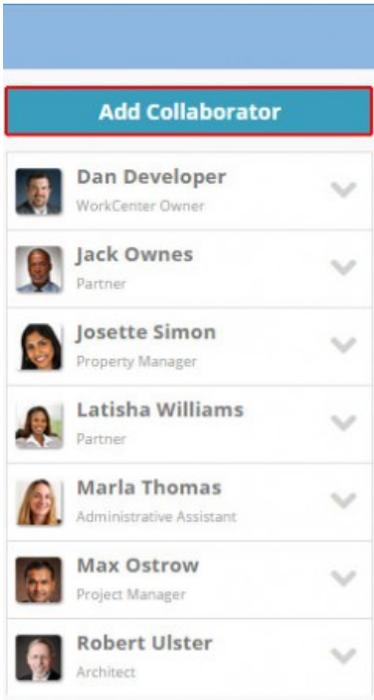
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On the new screen, you can make changes to the information you have previously added, upload a photo, etc. When you are done, click the blue “Save changes” button.

Q: How can I invite collaborators to a WorkCenter?

A: When you are in a WorkCenter, click the “Add Collaborator” link on the right side of the page underneath the “Collaborators” area. Only Delegated Administrators from your Organization will have access to perform this functionality.



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Once clicked, you will see the Invite Collaborator screen. Now you can invite new users to the WorkCenter, both those who currently use Procorem and those who do not. Under “Selected Collaborators” set the individual as a Contributor or Read Only. If you want to see the permissions for different roles, click “What are the available WorkCenter roles and what access do they have?”.

Home / Affordable Housing Company / Garden Court Apartments / Add Collaborators

Add Collaborators

Filter by Account:
-- All --

josettej +

Josette Simon
procoredev+josette@gmail.com
Early Access Program Account, Affordable Housing Company

Selected Collaborators

Amy McWilliams
procoredev+amy@gmail.com
Early Access Program Account, Affordable Housing Company

Legal Counsel x

What are the available workcenter roles and what access do they have?

Personal Note

Please join my private and secure Garden Court Apartments WorkCenter.

Your personal message will be emailed to each new collaborator.

Add Cancel

Home / Your Profile

Dan Developer

Profile Picture Invites Password Preferences Background Processes

First Name
Dan

Last Name
Developer

Email
procoredev@gmail.com

Time zone
(UTC-07:00) Mountain Time (US & Canada)

Address

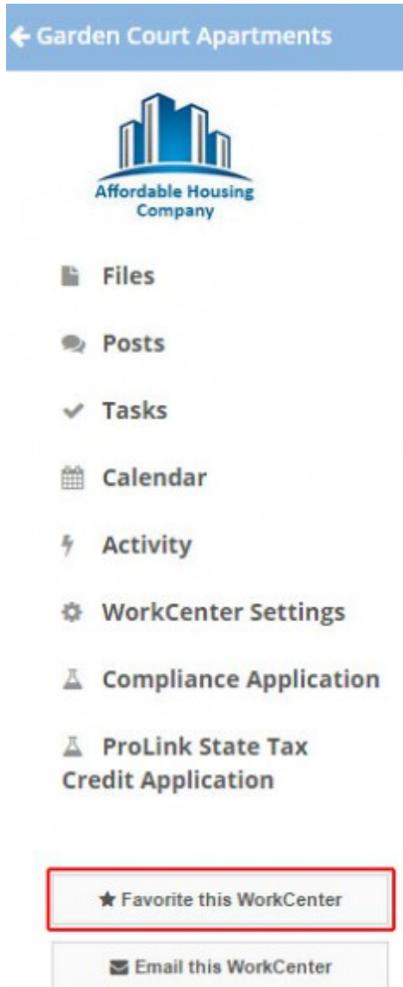
If they do not currently use Procorem, you will need to provide an email address so we can invite them to join.



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Q: How do I manage my favorite WorkCenters?

A: Once you are in a WorkCenter you want to add or remove from your list of favorites, click the “Favorite this WorkCenter” button on the bottom of the left-hand navigation menu. Click the button again to remove the WorkCenter from your favorite list.



To see a list of your favorite WorkCenters, head to the Home Page and select “My Favorites” in the upper left navigation menu.

Q: Who should I contact if I am having difficulties logging in?

A: If you are having difficulties with access contact your Delegated Administrator within your organization to ensure you have proper access.

Q: If you are still having difficulties using Procorem?

A: Go to <https://www.wheda.com/developers-and-property-managers/developers/commercial-lending-officers> for a listing of Commercial Lending Officers to contact for assistance.

