



A Procore Software User Guide on Emails

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Emails Tab Overview

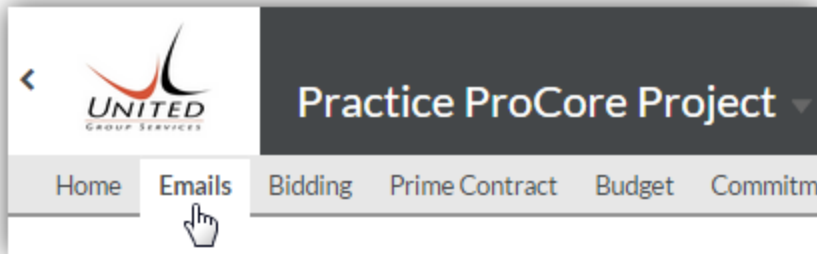
The Emails tab is designed to organize and manage the project emails. Setting internal email enhances the communication at the project level, allowing team members to access, search, and track emails in real-time. The privacy functionality of the Emails tab can be enabled to ensure that only the message creator and selected users are allowed to view the message.

This Module provides users with detailed instructions on how to:

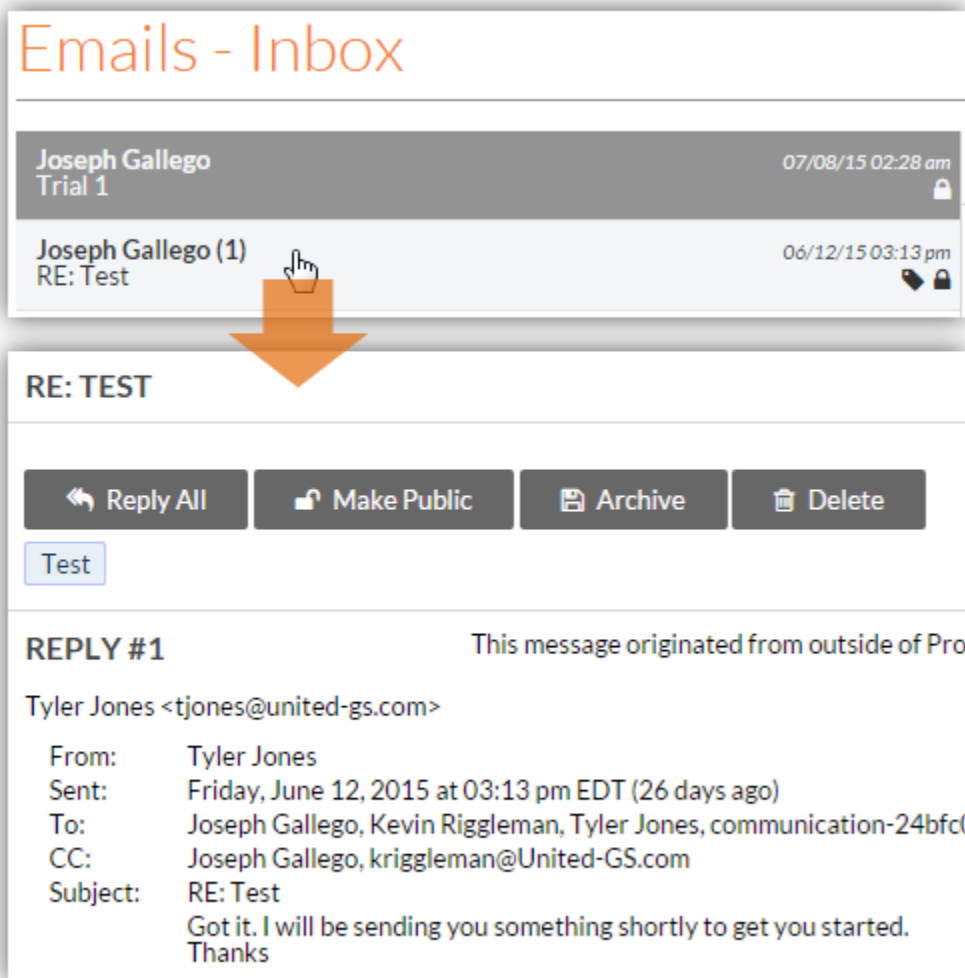
- View an Email on Procore
- Create, Reply, Archive, Change Privacy, Delete an Email
- Change Email Page Views
- Create, Add, Remove, and Delete Tags
- Filter Emails
- Forward Emails to Project Emails Tab
- Configure Email Settings
- Export Emails
- Training Videos
- Contact Procore Live Chat Support

How to View an Email in Procore

1. Go to the **Emails** tab.
 - a. The **Emails** tab opens.



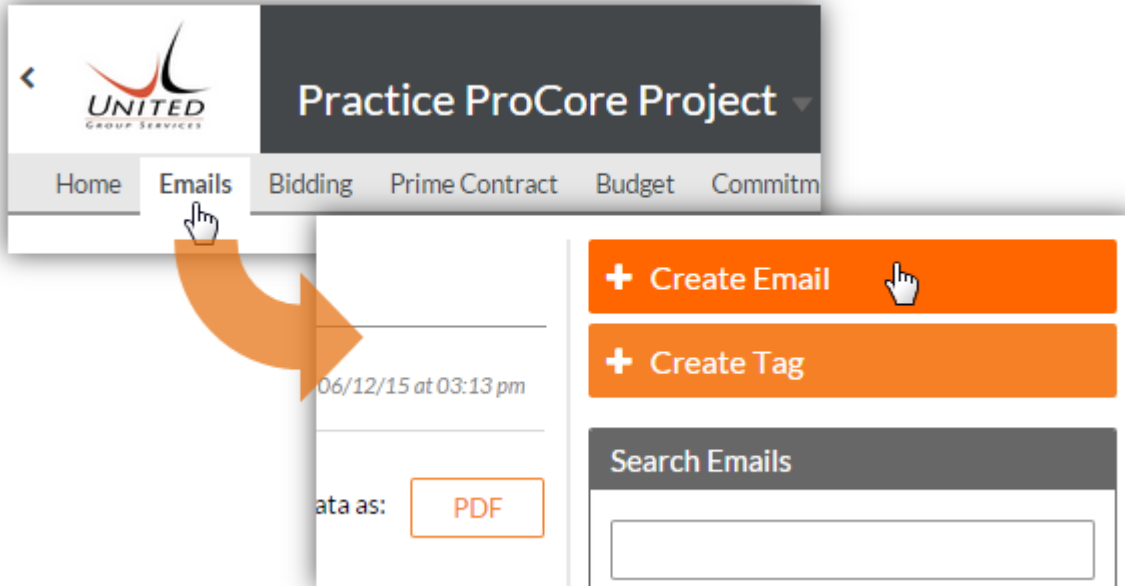
2. On the **Emails** list, select an email to view.
 - a. The selected email will be displayed in the email content pane.



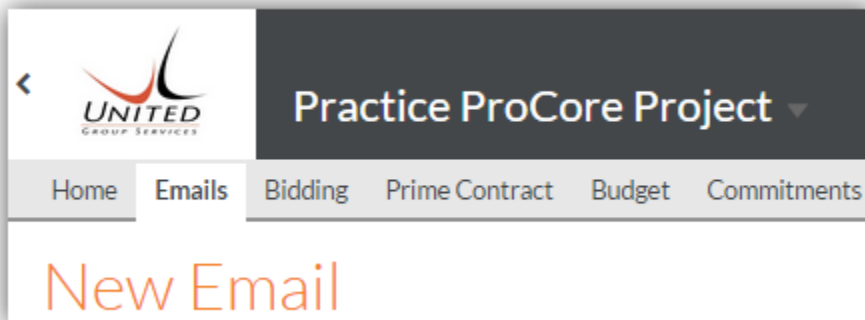
3. To reply to the email, click **Reply**. See [How to Reply to an Email](#).
4. To delete the email, click **Delete**. See [How to Delete an Email](#).
5. To move the email to archive, click **Archive**. See [How to Archive an Email](#).
6. To set the privacy of an email to public, click **Make Public**. See [How to Make an Email Public](#).

How to Create an Email

1. Go to the **Emails** tab.
 - a. The **Emails** tab opens.



2. On the right sidebar, click **+Create Email**.
 - a. The **New Email** page opens.




3. In the **To** field, click the drop down arrow to select a recipient.
 - a. **Note:** users can add multiple recipients by clicking the drop down arrow and selecting additional recipients.

To:	✖ Jones, Tyler (United Group Services)	CC:	✖ Gallego, Joseph (Elance)
	Select A Person...		✖ Rigglesman, Kevin (United Group Services)
	Select A Person...		Select A Person...

4. In the **CC** field, click the drop down arrow to select the person to be added in the CC field.
 - a. **Note:** users can add multiple recipients by clicking the drop down arrow and selecting additional recipients.
5. In the **Private** field, select the checkbox to make this email private.

Private: ?	<input checked="" type="checkbox"/>
Subject:	Floor Tiles

6. In the **Subject** field, enter the subject of the email.
7. To attach files, drag and drop the files to the **Drag and Drop File(s)** section or click the **Attach File(s)** link.

 Attach File(s)	Drag and Drop File(s)
--	-----------------------

8. In the **Message** field, enter your message.
 - a. **Note:** **Formatting** tools are enabled.

Message:	<div> B <i>I</i> <u>U</u> ☰ ☷ ☷ ☰☷ ☷☷ ☷☷ ☷☷ ✂ </div> <p>Floor tiles needs to be checked.</p> <p>Sent From Procore.</p>
----------	---

9. In the **RELATED ITEMS** section, specify the items related to this email. **(Optional)**

RELATED ITEMS

Type	Description	Date	Notes
<div>Extra Work Order</div>	<div>Select a Generic Tool Item:</div>		

10. In the **Type** field, click the drop down arrow to select an item related to this email.
 - a. **Note:** additional fields will be activated (e.g. description, dates, notes, etc.).
11. Click **Send**.
 - a. The **Email** message will be sent to the recipient(s).

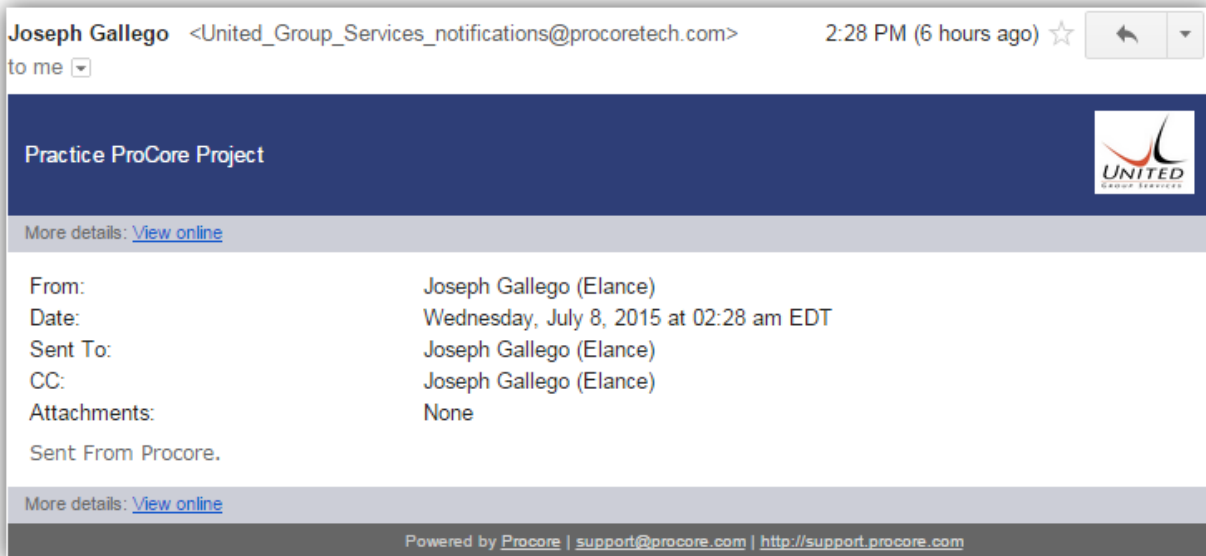
Cancel

Send

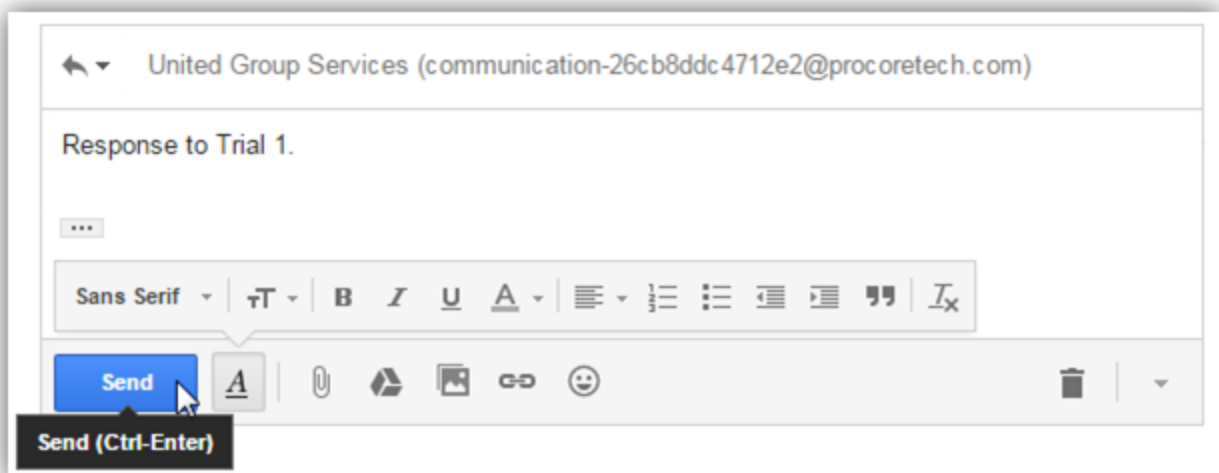
How to Reply to an Email Message from Procore using an External Email

Note: replying to an email sent from Procore is the same as replying to an email from any other email services.

1. On your email, open the message sent from **Procore**.

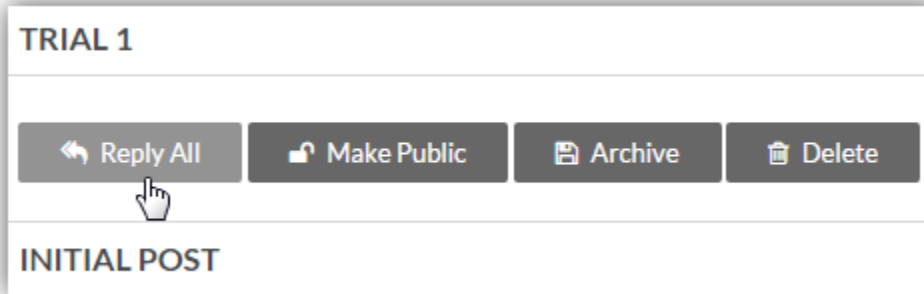


2. Create a reply and click **Send**.
 - a. The reply from the external email will be displayed in the Procore's **Emails** tab.

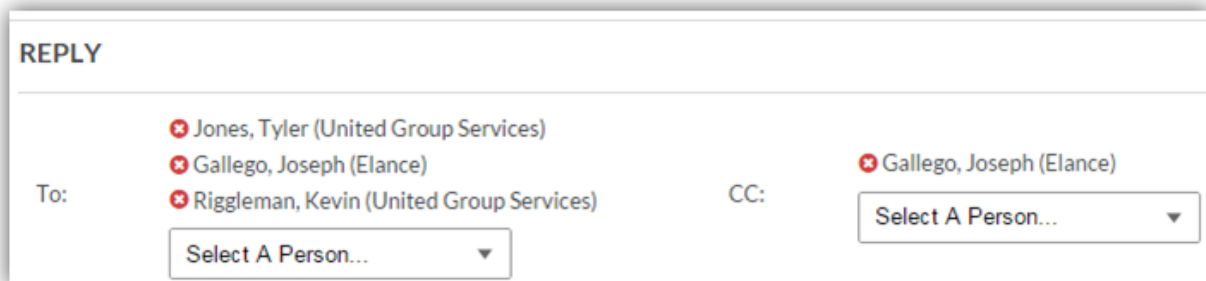


How to Reply to an Email from the Emails Tab Within Procore

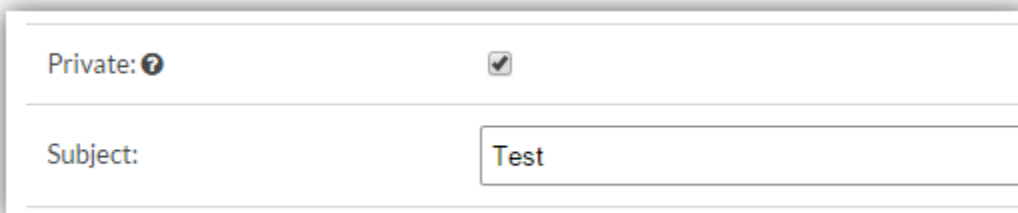
1. Open an email. See [How to View an Email in Procore](#).
 - a. The selected email opens.
2. Click **Reply All**.
 - a. The **Reply** pane expands.



3. The **To** field will automatically populate recipients. To add more recipients, click the drop down arrow and select recipient(s) from the list.

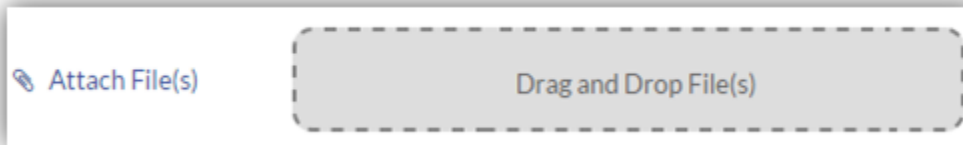


4. The **CC** field will automatically populate the sender's name. To add more, click the drop down arrow and select additional users from the list.
5. The **Private** field is selected by default. To make the current reply public, de-select the **Private** Checkbox.

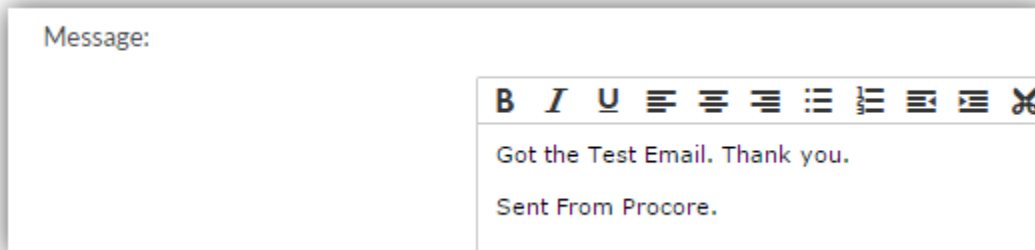


6. In the **Subject** field, the subject of the reply will automatically populate.

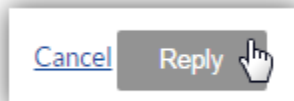
7. To attach files, drag and drop the files to the **Drag and Drop File(s)** section or click the **Attach File(s)** link.



8. In the **Message** field, enter your message
 - a. **Note:** Formatting tools are enabled.

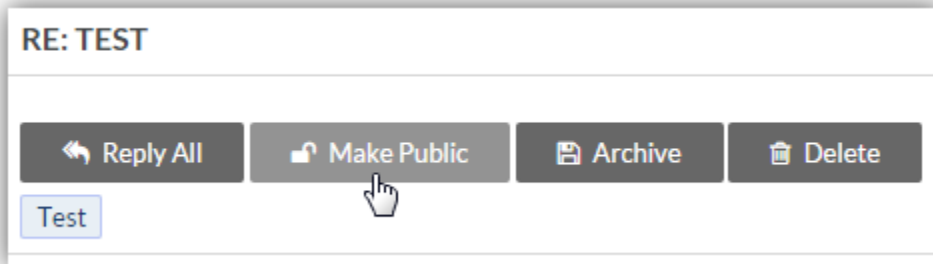


9. Click **Reply**.
 - a. Your reply will be sent to all recipients.



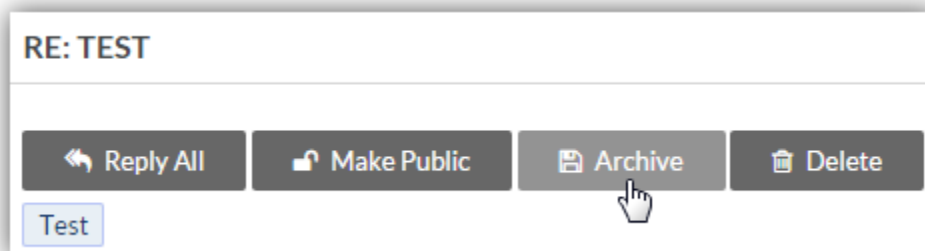
How to Make a Private Email Public

1. Open an email. See [How to View an Email in Procore](#).
 - a. The selected email opens.
2. To convert a private email to public, click **Make Public**.
 - a. The selected email will be changed to public.
 - b. **Note:** to revert to the previous mode, click **Make Public** again.



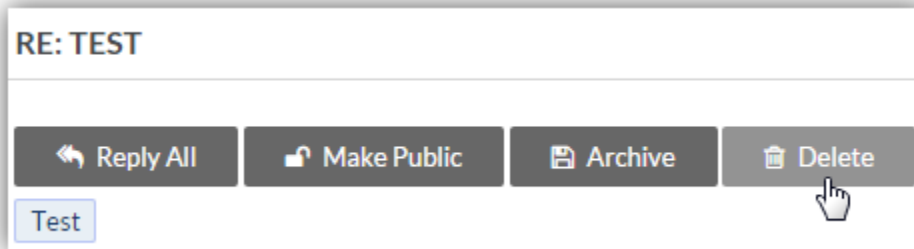
How to Archive an Email

1. Open an email. See [How to View an Email in Procore](#).
 - a. The selected email opens.
2. To move an email to archive, click **Archive**.
 - a. The selected email will be moved to the **Archive** folder. See [Archive](#).
 - b. **Note:** to move the email back to the Inbox folder, click **Return To Inbox**.



How to Delete an Email

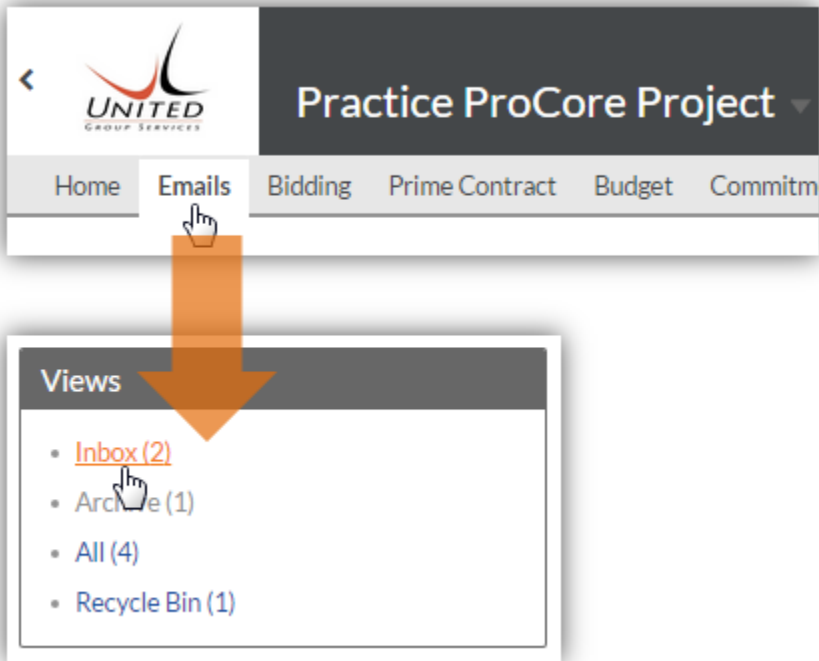
1. Open an email. See [How to View an Email in Procore](#).
 - a. The selected email opens.
2. To delete an email, click **Delete**.
 - a. The selected email will be deleted and moved to the **Recycle Bin** folder. See [Recycle Bin](#).



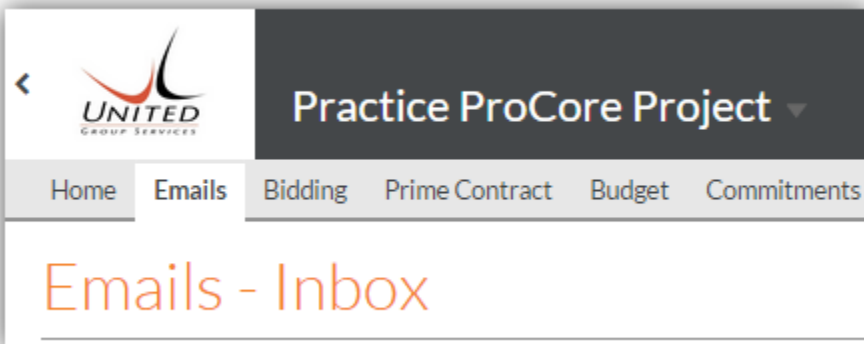
Email Page Views

Inbox

1. Go to the **Emails** tab.
 - a. The **Emails** tab opens.
2. On the right sidebar, locate the **Views** panel.

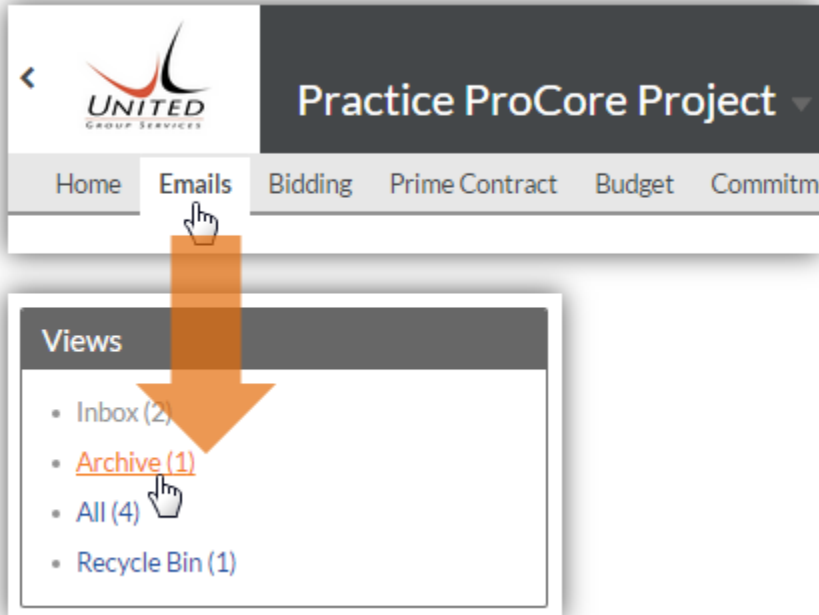


3. In the **Views** panel, click **Inbox**.
 - a. The **Emails - Inbox** page will appear.
 - b. **Note:** the **Inbox** view is selected by default.

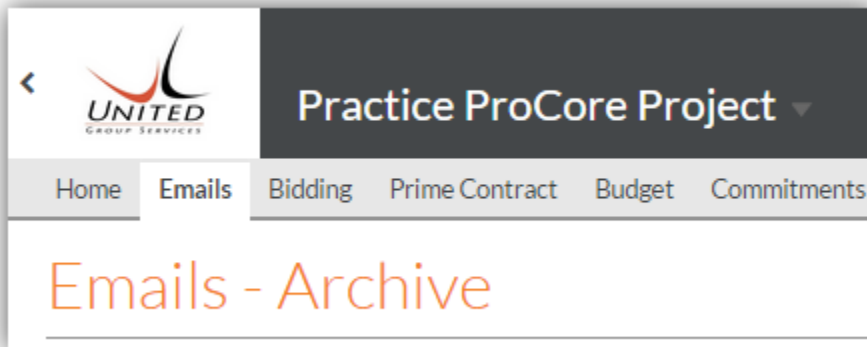


Archive

1. Go to the **Emails** tab.
 - a. The **Emails** tab opens.
2. On the right sidebar, locate the **Views** panel.

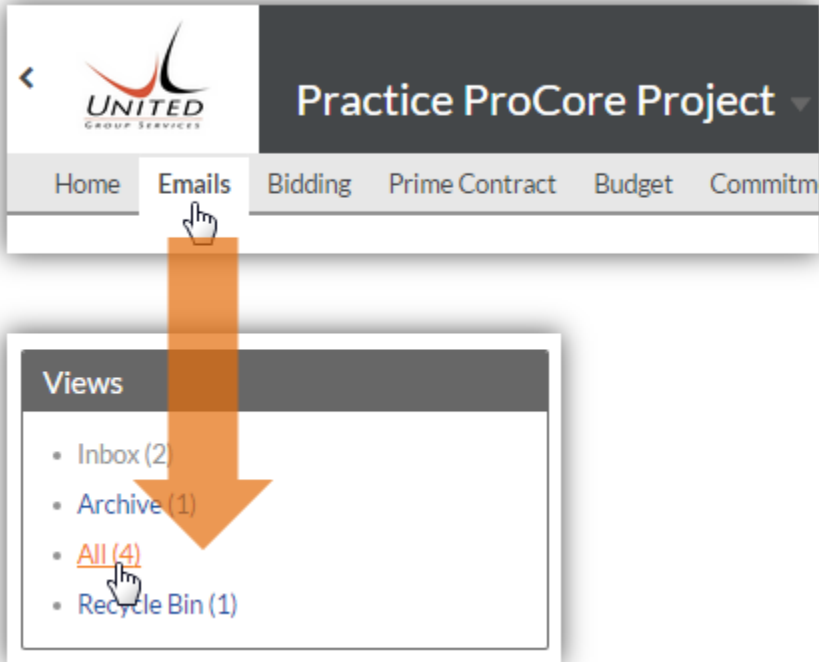


3. In the **Views** panel, click **Archive**.
 - a. The **Emails - Archive** page will appear.

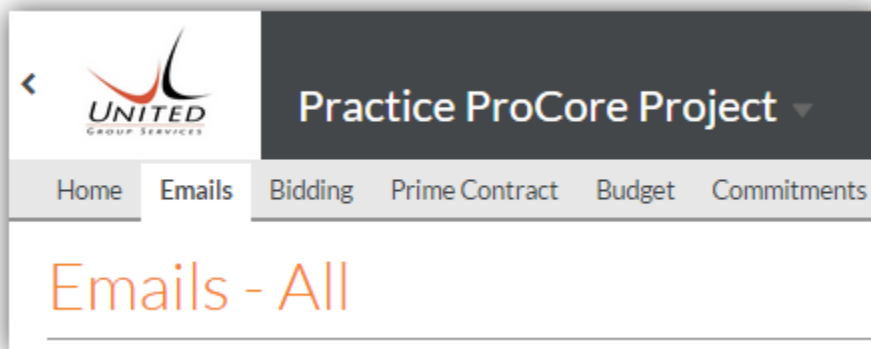


All

1. Go to the **Emails** tab.
 - a. The **Emails** tab opens.
2. On the right sidebar, locate the **Views** panel.

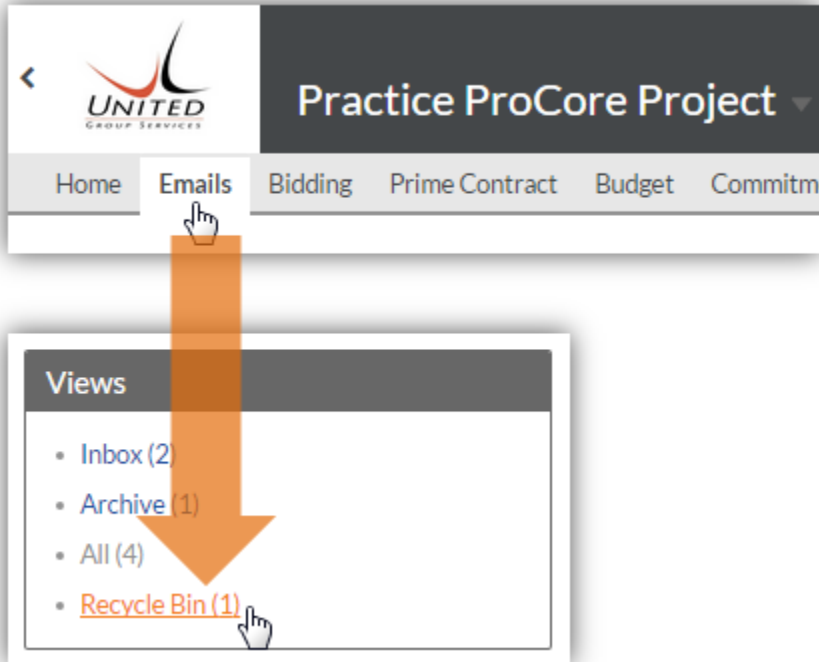


3. In the **Views** panel, click **All**.
 - a. The **Emails - All** page will appear.

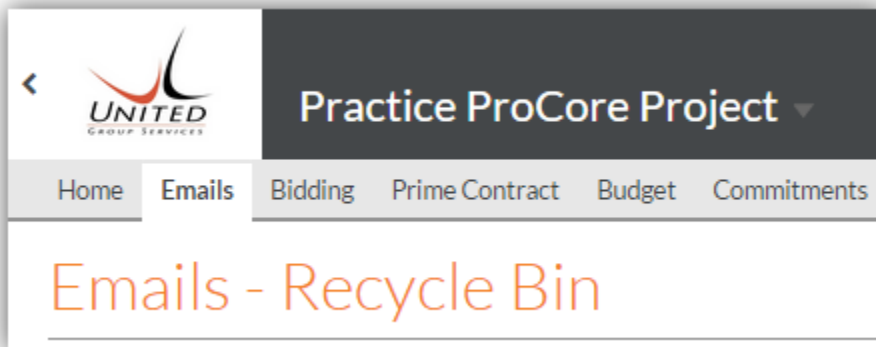


Recycle Bin

1. Go to the **Emails** tab.
 - a. The **Emails** tab opens.
2. On the right sidebar, locate the **Views** panel.



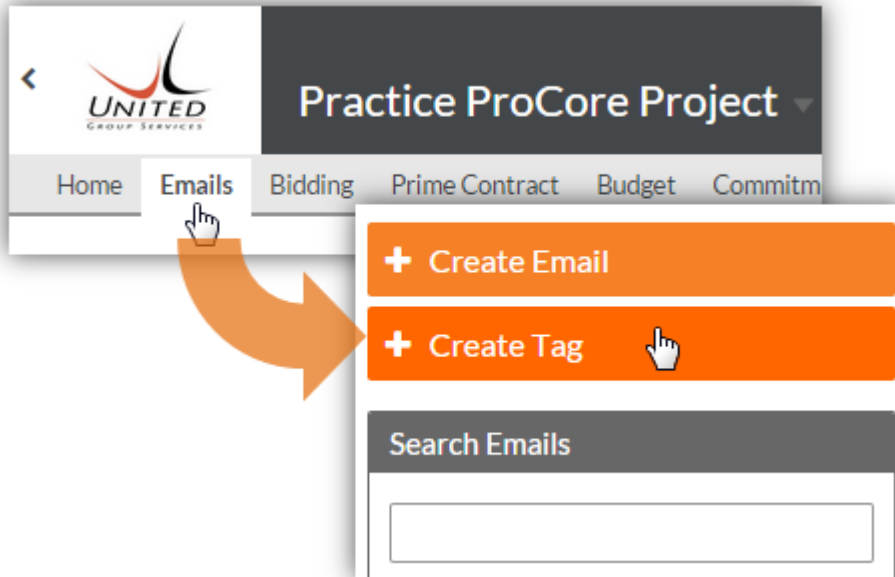
3. In the **Views** panel, click **Recycle Bin**.
 - a. The **Emails – Recycle Bin** page will appear.
 - b. **Note:** to move the email back to the Inbox folder, click **Return To Inbox**.



Tags

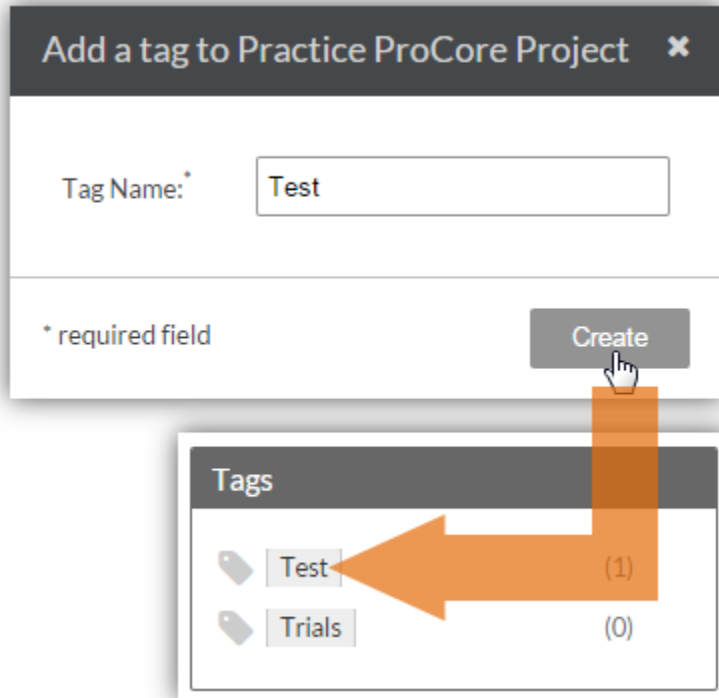
How to Create a Tag

1. Go to the **Emails** tab
 - a. The **Emails** tab opens.



2. On the right sidebar, click **+Create Tag**.
 - a. The **Add a tag to <Name of Project>** window appears.

3. In the **Tag Name*** field, enter the name of the tag.





The image shows two overlapping UI elements. The top element is a dialog box titled "Add a tag to Practice ProCore Project" with a close button (X). It contains a "Tag Name:" label followed by an input field containing the text "Test". Below the input field is a "* required field" label and a "Create" button. A mouse cursor is pointing at the "Create" button. The bottom element is a "Tags" panel. It has a header "Tags" and a list of tags. The first tag is "Test" with a count of "(1)". The second tag is "Trials" with a count of "(0)". An orange arrow points from the "Create" button in the dialog box to the "Test" tag in the "Tags" panel.

Add a tag to Practice ProCore Project ✕

Tag Name:

* required field Create

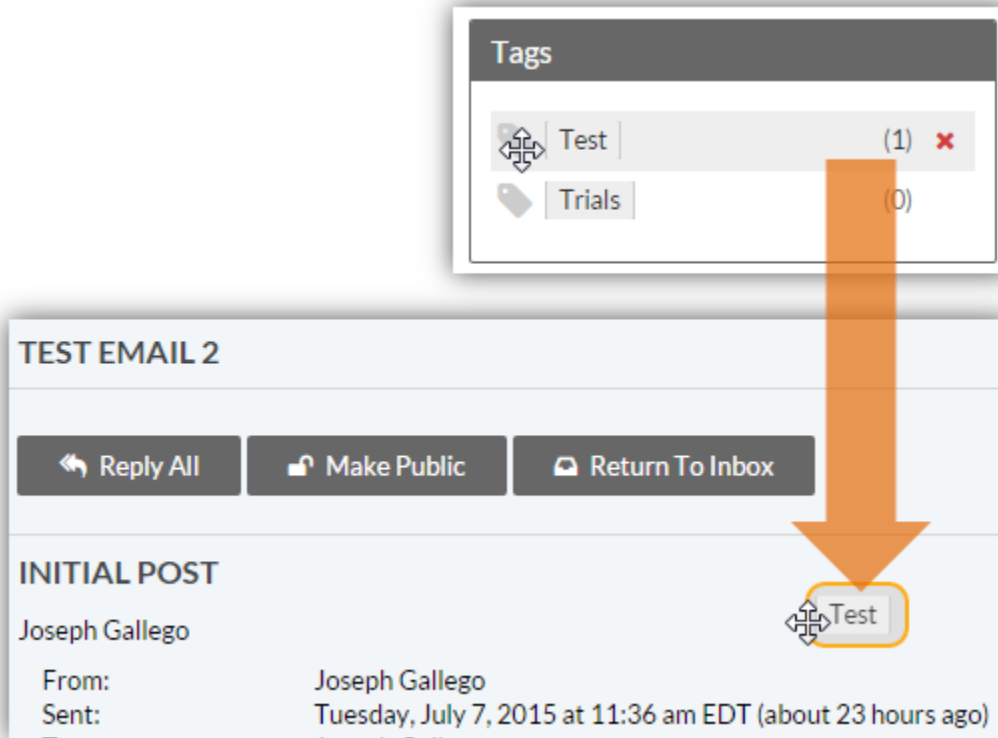
Tags

 Test	(1)
 Trials	(0)

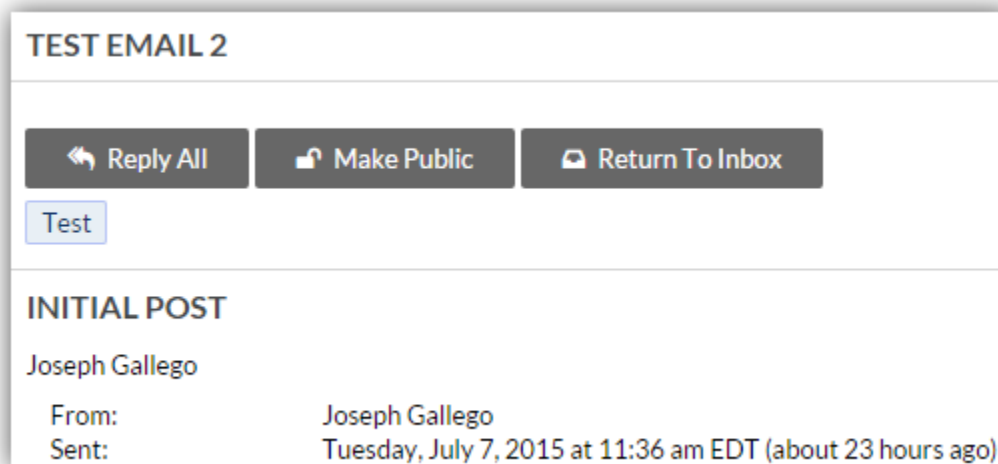
4. Click **Create**.
 - a. The tag will appear in the **Tags** panel.

How to Add a Tag to an Email

1. Open an email. See [How to View an Email in Procore](#).
 - a. The selected email opens.

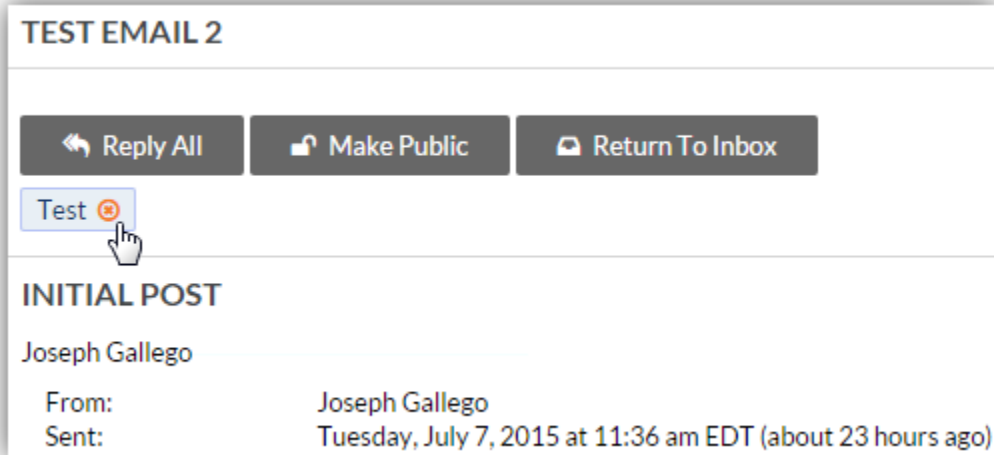


2. On the **Tags** panel, choose and drag the tag to be added and drop it on the selected email.
 - a. The tag will be added on the selected email.



How to Remove a Tag from an Email

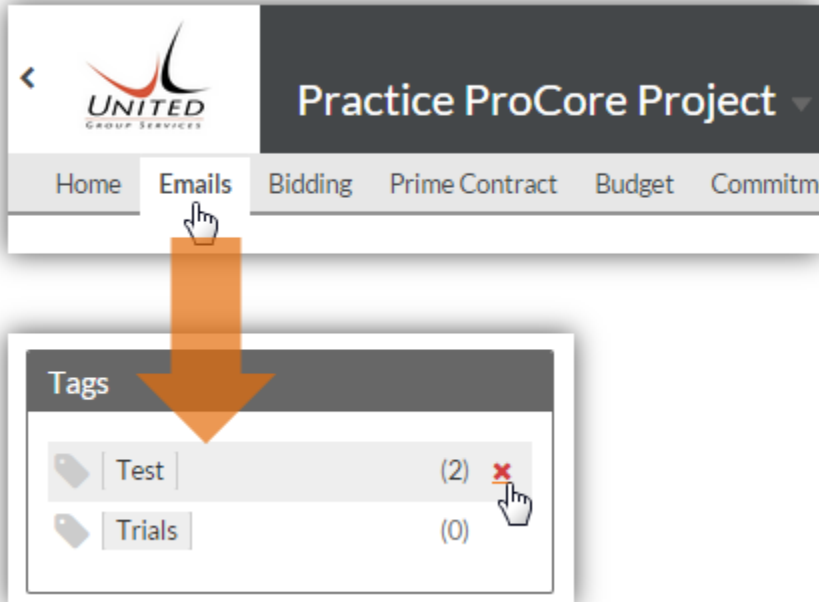
1. Open an email. See [How to View an Email in Procore](#).
 - a. The selected email opens.



2. On the selected email, locate the tag and click the **x** mark beside it.
 - a. The tag will be removed from the selected email.

How to Delete a Tag

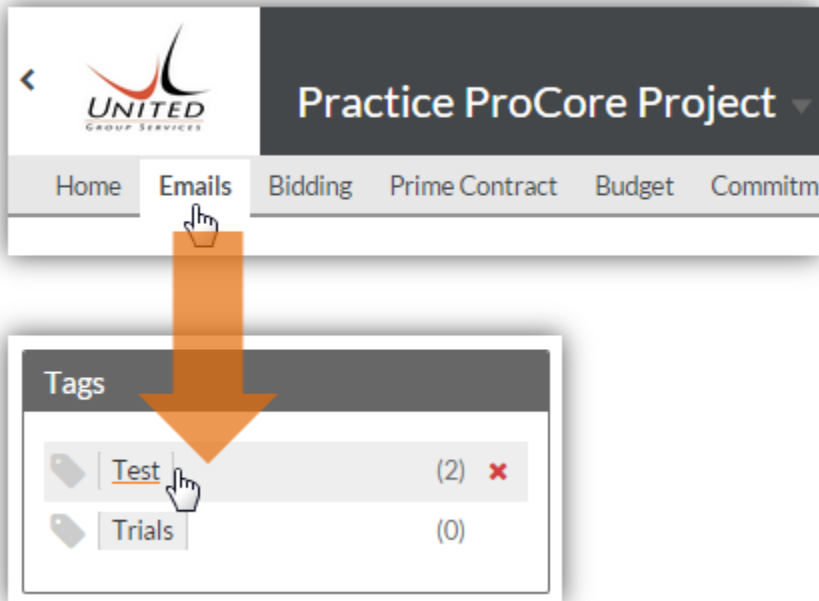
1. Go to the **Emails** tab.
 - a. The **Emails** tab opens.
2. On the right sidebar, locate the **Tags** panel.



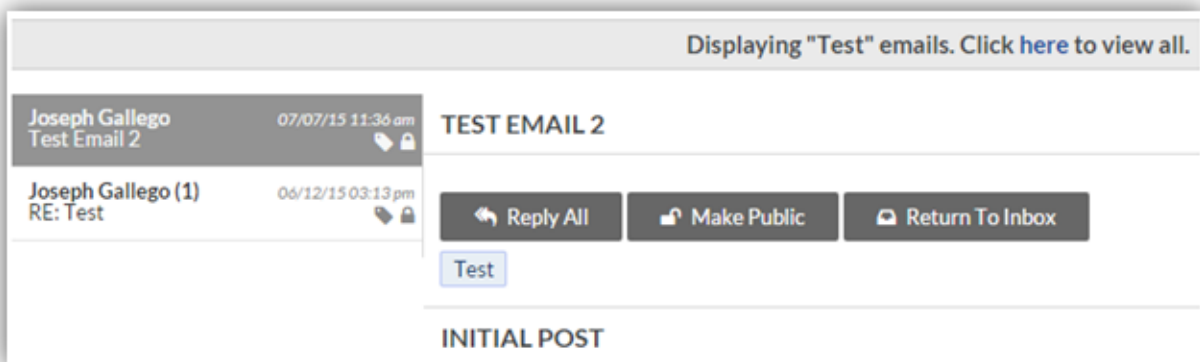
3. On the **Tags** panel locate the tag(s) to be deleted and click the **x** mark beside it.
 - a. The tag will be deleted from the **Tags** panel.

How to Filter Using Tags

1. Go to the **Emails** tab.
 - a. The **Emails** tab opens.
2. On the right sidebar, locate the **Tags** panel.

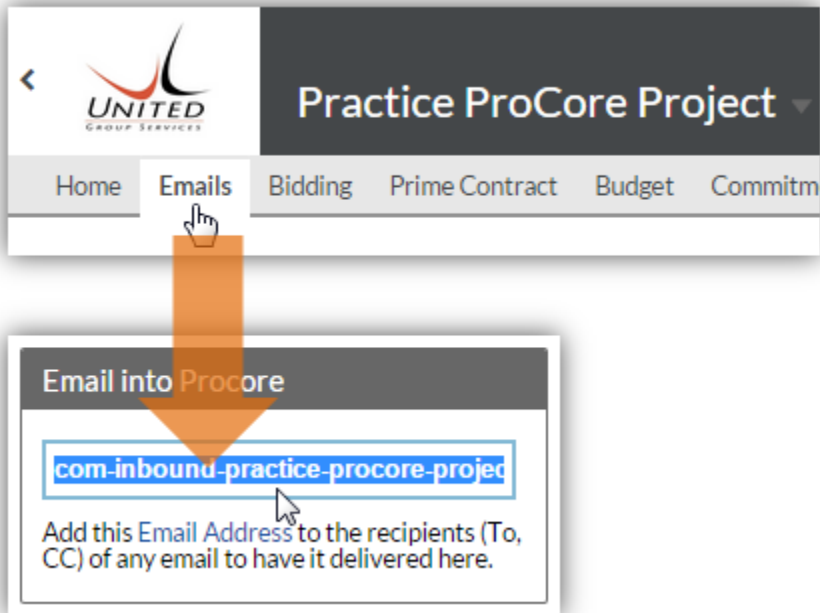


3. On the **Tags** panel, select a tag to be used as a filter.
 - a. The emails containing the selected tag will be displayed on the **Emails** list.
 - b. **Note:** to display all emails and remove the filter, locate the **Displaying "<Filtered tag>" emails. Click [here](#) to view all.** notification and click the [here](#) link.



How to Forward an Email to the Project's Emails tab

1. Go to the **Emails** tab.
 - a. The **Emails** tab opens.
2. On the right sidebar, locate the **Email into Procore** panel.

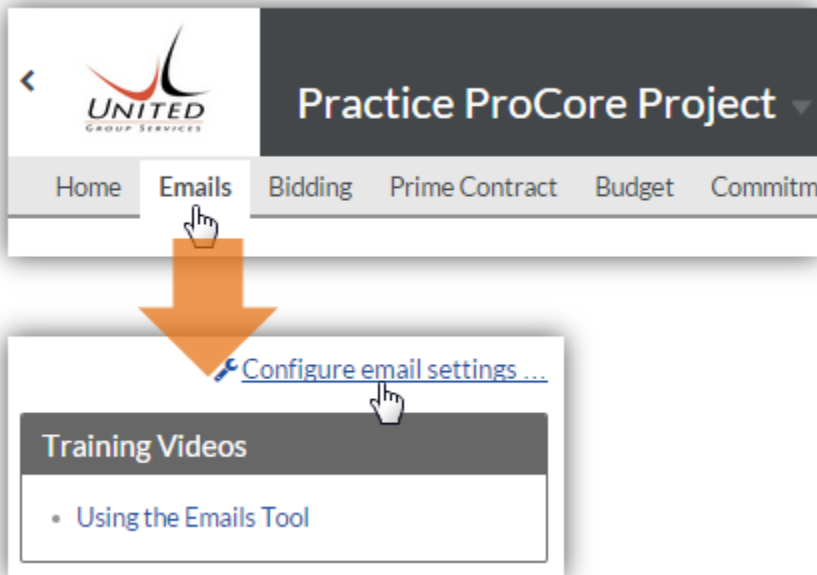


3. Copy the **Email Address** on the field and paste it on the external email's recipient's field.

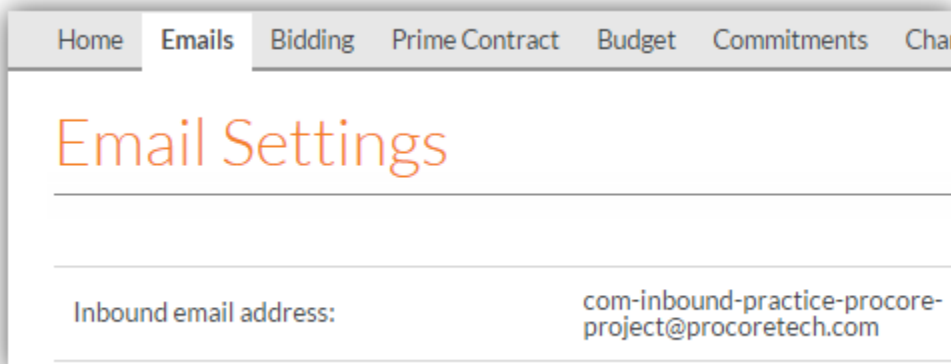
Email Settings

How to Configure the Email Settings

1. Go to the **Emails** tab.
 - a. The **Emails** tab opens.
2. On the right sidebar, locate and click the **Configure email settings...** link.
 - a. The **Email Settings** page opens.
 - b. **Note:** the **Email Settings** page is the default page under the **Configure email settings...** link.

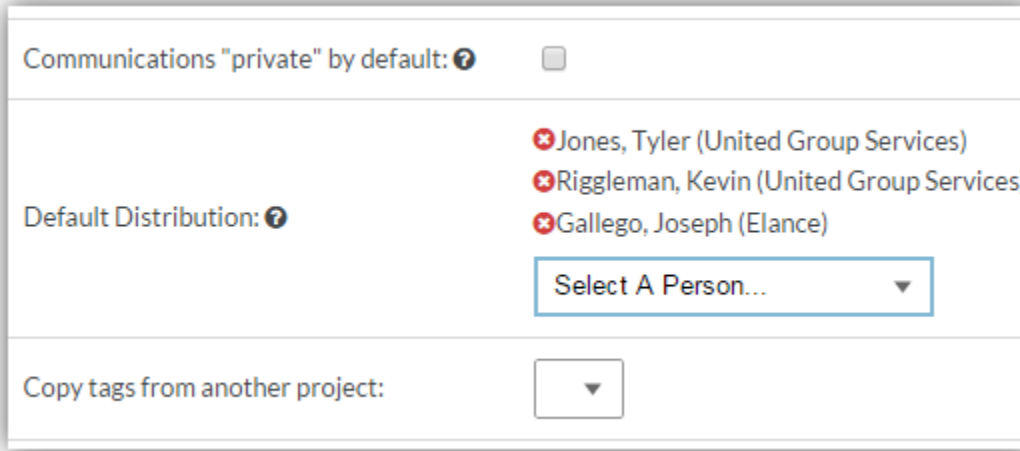


3. To update the **Permissions Table**, click the **Permissions Table** link on the right sidebar.
4. Configure the **Email Settings**.



5. The **Inbound email address** will display an email address that users can add to their email clients (Gmail, Outlook, etc.).

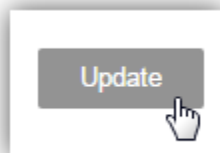
6. In the **Communications “private” by default** field, select the checkbox to set all communications to private by default.
 - a. **Note:** only the users who are included in the email will be able to see the email.



The screenshot shows a settings form with three sections:

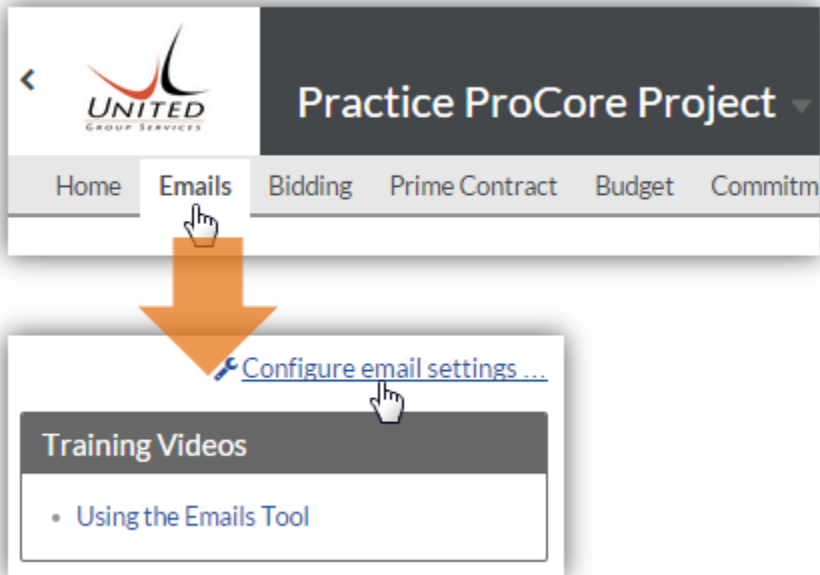
- Communications "private" by default:** A checkbox that is currently unchecked.
- Default Distribution:** A list of three users with red 'x' icons next to their names:
 - Jones, Tyler (United Group Services)
 - Rigglesman, Kevin (United Group Services)
 - Gallego, Joseph (Elance)
 Below the list is a dropdown menu with the text "Select A Person..." and a downward arrow.
- Copy tags from another project:** A dropdown menu with a downward arrow.

7. In the **Default Distribution** field, click the drop down arrow to select the default distribution preference.
8. In the **Copy tags from another project** field, click the drop down arrow to select tags from another project to copy.
9. Click **Update**.
 - a. The **Email Settings** will be updated.

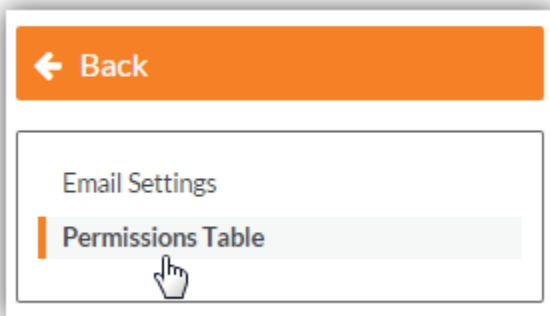


How to Update User Permissions for Emails

1. Go to the **Emails** tab.
 - a. The **Emails** tab opens.
2. On the right sidebar, locate and click the **Configure email settings...** link.
 - a. The **Email Settings** page opens.
 - b. **Note:** The **Email Settings** page is the default page under the **Configure email settings...** link.



3. On the **Email Settings** page's right sidebar, click **Permissions Table**.
 - a. The **USER PERMISSIONS FOR EMAILS** table appears.



4. Update users' permission by clicking the **Check Mark** or **X Mark** on the appropriate column.

USER PERMISSIONS FOR EMAILS					
Name	Company	None	Read Only	Standard	Admin
Jones, Tyler	United Group Services	X	X	X	✓

Column	Description
None	Selecting this permission will not allow the user to view, create, or reply to emails from the Project level's Emails tab.
Read Only	Selecting this permission will allow the user to view, filter, search, and reply to an email originated in the Emails tab from an external email.
Standard	Selecting this permission will allow the user to view, filter and search, create an email, add email signatures to project level emails. However, the user does not have access on advance settings or retrieve deleted emails.
Admin	Selecting this permission will allow the user to access all features, advance settings, and deleted emails retrieval.

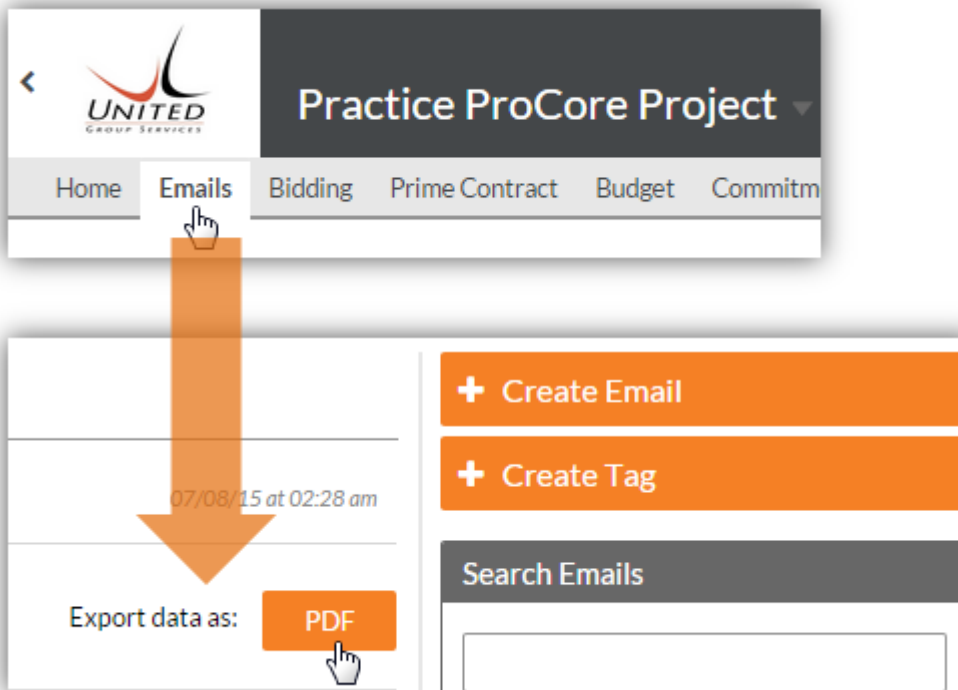
5. To search for a user, enter the user's name on the **Search Permissions** field.
 - a. The relevant result will appear on the **USER PERMISSIONS FOR EMAILS** table.

Search Permissions

Tyler

How to Export Email to PDF

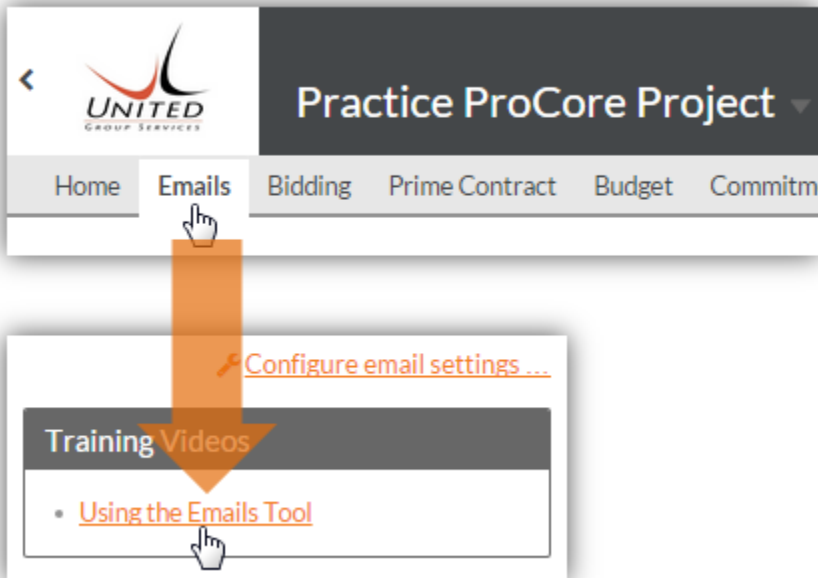
1. Go to the **Emails** tab.
 - a. The **Emails** tab opens.



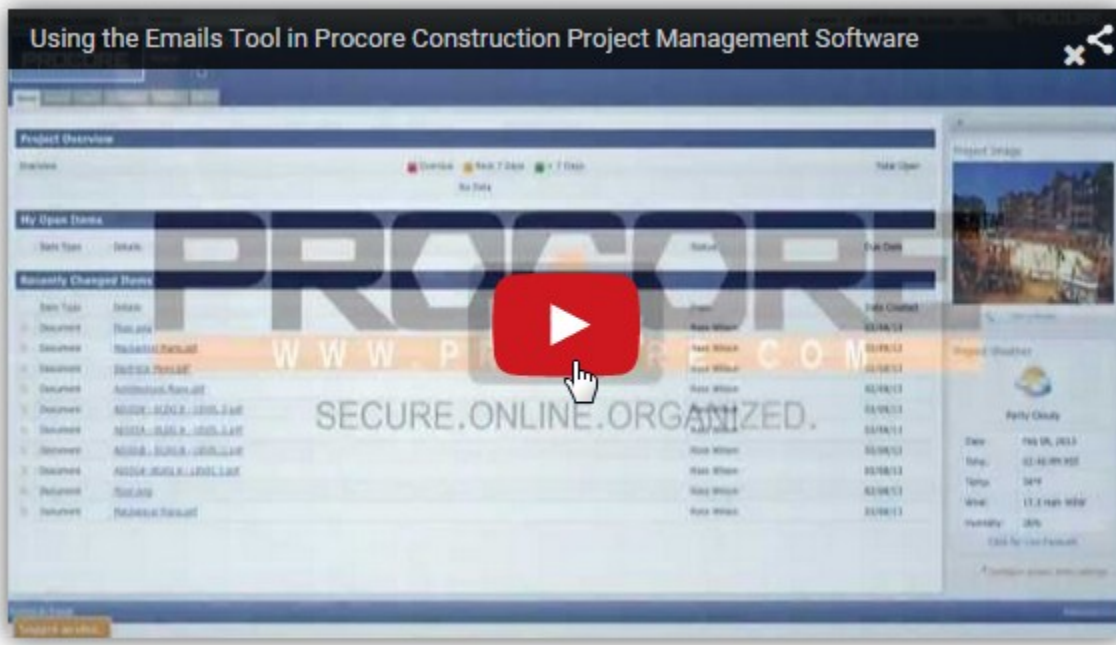
2. On the **Emails** tab, locate the **Export data as:** field and click **PDF** to export the email to PDF.

Training Videos

1. Go to the **Emails** tab.
 - a. The **Emails** tab opens.
2. On the right sidebar, locate the **Training Videos** panel.

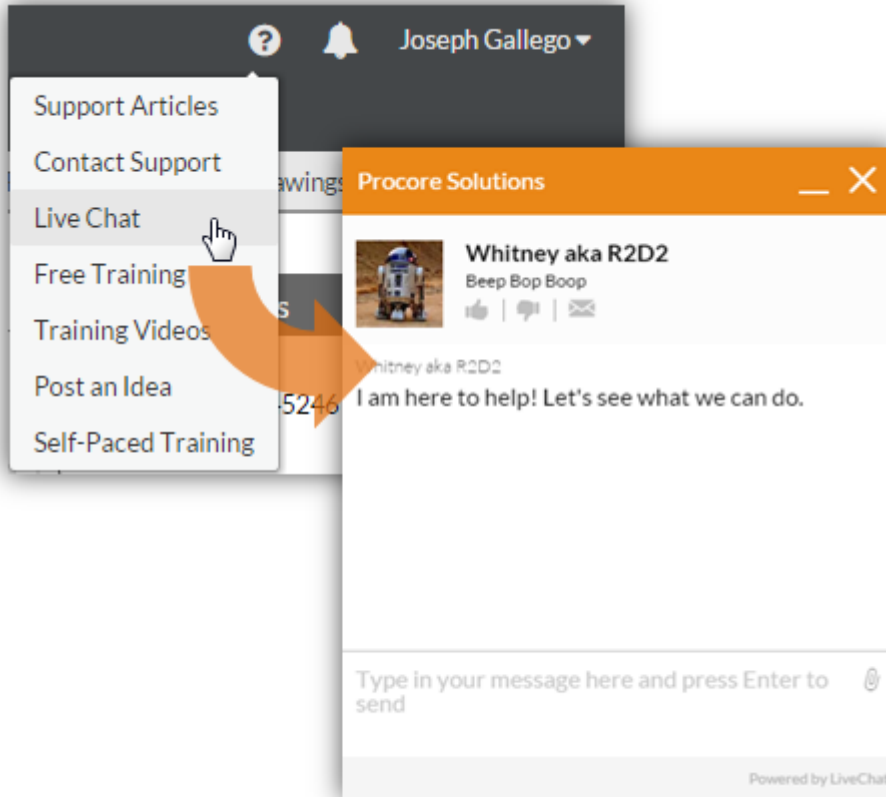


3. On the **Training Videos** panel, click the **Using the Emails Tool** link.
 - a. A **Video Tutorial** appears.
4. Click the **Play** button to play the video.



How to Use the Procore Live Chat Support

1. On the upper right corner of the page, click the **Support & Feedback** icon.
 - a. The **Support & Feedback** sub-menu opens.



2. Click **Live Chat**.
 - a. The **Live Chat** window opens.
3. Start the chat by typing your inquiry.