



# Introduction to Procorem

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# Presentation Agenda

- 01** Introduction to Procorem
- 02** Invitation to Procorem
- 03** Accessing the WorkCenter
- 04** Help Center for Procorem



# 01 Introduction to Procorem

## Introduction to Procorem

- ▶ Procorem is the first collaborative portal built for developers, state and local housing agencies, lenders, syndicators, and investors.
- ▶ Procorem provides transparent communication for applications, pipelines, asset management, and reporting.
- ▶ Procorem allows for easy setup of secure WorkCenters for project collaboration, both within your organization and with external partners and clients.



## Procorem Hierarchy



Procorem is **HHFDC**'s external-facing, front-office portal where information such as templates are published, and where **HHFDC**'s external customers/partners, such as developers or property managers, submit completed applications or compliance data to the **HHFDC**.

Features include:

- Private, invite-only WorkCenters to centralize and store proposal information
- File sharing, versioning, and collaboration
- Encrypted file and folder infrastructure
- Enterprise task and project management
- Time-stamping and complete audit history of all user activity
- Ability to save comments on files, tasks, and WorkCenters
- Mobile enabled, responsive design
- Uses HTTPS protocol and secured with the latest TLS encryption methods

## Supported Web Browsers

Procorem requires an up-to-date web browser to make sure that you can use all of Procorem's features.

Procorem currently supports the latest two versions of all browsers, unless otherwise noted.

Supported browsers include:

- Google Chrome (preferred)
- Microsoft Edge
- Apple Safari
- Mozilla Firefox





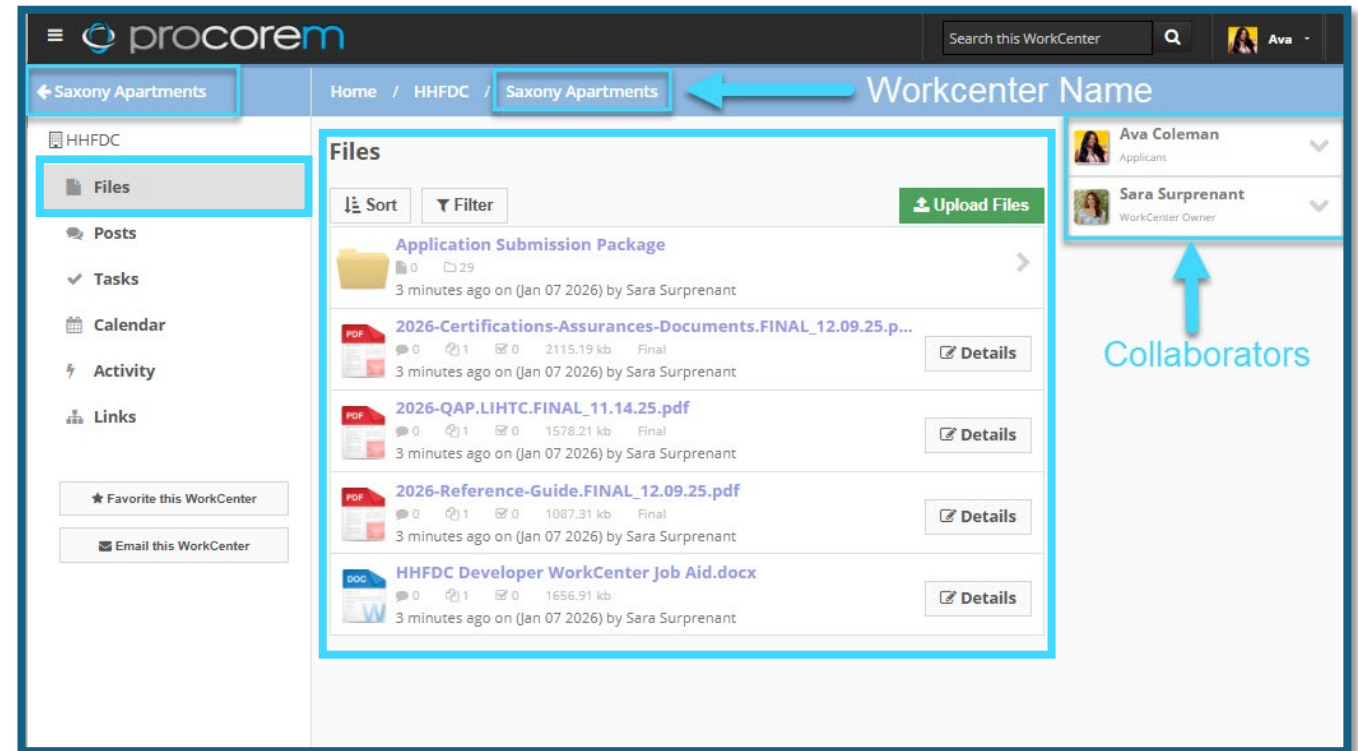


# 1. Introduction to Procorem

## Procorem WorkCenters

A **WorkCenter** is created and used for each housing development and represents a single project. Once you accept an invitation to a **WorkCenter**, you become a **Collaborator** in the **WorkCenter** and can share documents, submit data, and assign and complete tasks related to your project.

Procorem's **File** functionality enables **HHFDC** to publish templates to the **WorkCenter** collaborators. In turn, the collaborators can submit the completed applications and all supporting documents on Procorem using **File** functionality.





# QUESTIONS?

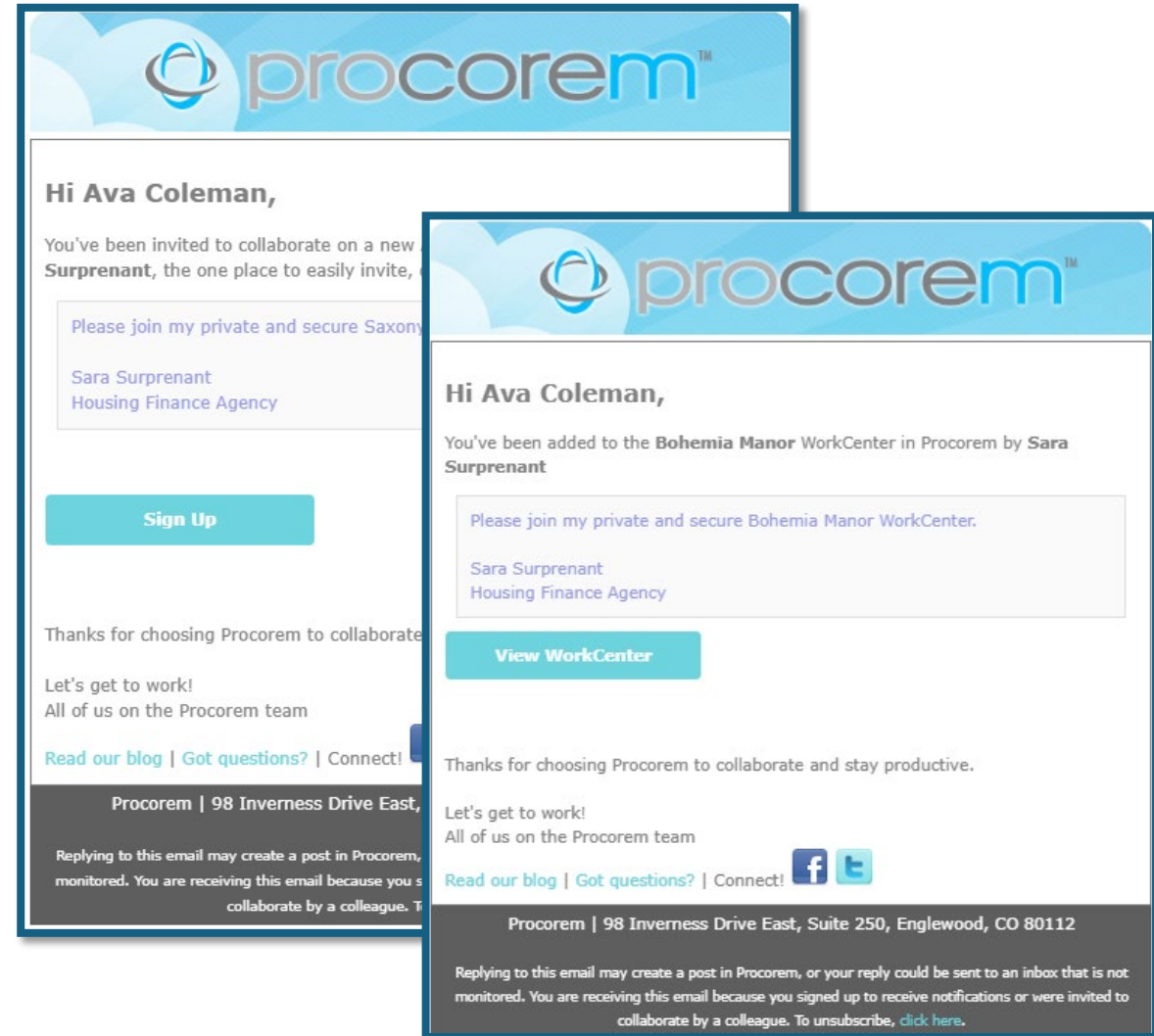


## 02 Invitation to Procorem



# Invitation to Procorem


- ▶ When you're added to the **WorkCenter** as a collaborator, you'll receive an e-mail invitation **from your state agency**. **\*Most of you should have received an invite from HHFDC within the past 24 hours\***
- ▶ If it's the first time you've accessed **Procorem**, you'll need to create an account with the email address where the invitation was received. You'll be directed to the **Procorem Sign Up** page when clicking the **Sign Up** button.
- ▶ If you don't receive an invite, **verify your IT department has not marked emails from [notifications@mail.procorem.com](mailto:notifications@mail.procorem.com) as spam.**
- ▶ Once you've created an account in **Procorem** and receive an invite to an additional **WorkCenter**, you can click on the **View WorkCenter** in the body of the email invitation to directly access **Procorem**.



# Invitation to Procorem

Once you've clicked the **Sign Up** button on your invitation email, you'll see the **Sign Up Now** page.

- 1 Verify your **First Name, Last Name, and Email** are correct.
- 2 Enter a password that meets the **Password Criteria** requirements. The red text will turn green as each requirement is met while creating your password.
- 3 Click the checkbox next to “**I agree to the terms and conditions**” text.
- 4 Click the **Sign Up Now** button.



The screenshot shows the Procorem 'Sign Up Now' page. At the top, the Procorem logo and tagline 'Accelerate Your Outcome' are visible. The main heading is 'You've been invited to join Procorem! Easily collaborate with friends, family, co-workers, and clients'. Below this, a welcome message for 'Ava Coleman' is shown, along with a note from 'Sara Surprenant' inviting her to join their private and secure account at 'Housing Finance Agency'. The form fields are: First Name (Ava), Last Name (Coleman), Email (sara.surprenant@gmail), and Password. A callout '1' points to the First Name field. A callout '2' points to the Password field. A callout '3' points to the checkbox labeled 'I agree to the terms and conditions'. A callout '4' points to the 'Sign Up Now' button. To the right of the form, there is a section titled 'Procorem is Built for You' with a description of the platform's features, and another section titled 'Beyond the Firewall' with a description of the security features. Below the screenshot, a callout box with a '2' contains the password requirements: 'Cannot contain spaces.', 'Contains at least 1 number.', 'Contains at least 1 capital letter.', 'Contains at least 1 lowercase letter.', and 'Must be at least 8 characters long.'

**Procorem**™ Accelerate Your Outcome

You've been invited to join Procorem!  
Easily collaborate with friends, family, co-workers, and clients

Welcome, Ava Coleman!

Sara Surprenant would like you to join their private and secure account, Housing Finance Agency.

As a guest, your access is completely free. Simply fill out the form below to begin working together!

First Name: Ava Last Name: Coleman

Email: sara.surprenant@gmail Password: [Redacted]

☒ I agree to the terms and conditions.

**Sign Up Now**

**Procorem is Built for You**

Procorem is built for people and interactions. With functionality like file management, task-setting, time-stamping, alerts, email integration, and in-app communication, your team will be able to decrease time spent waiting and working on each process. Projects will get completed faster, and best practices and compliance will be built-in. Procorem provides the flexible structure your team needs.

**Beyond the Firewall**

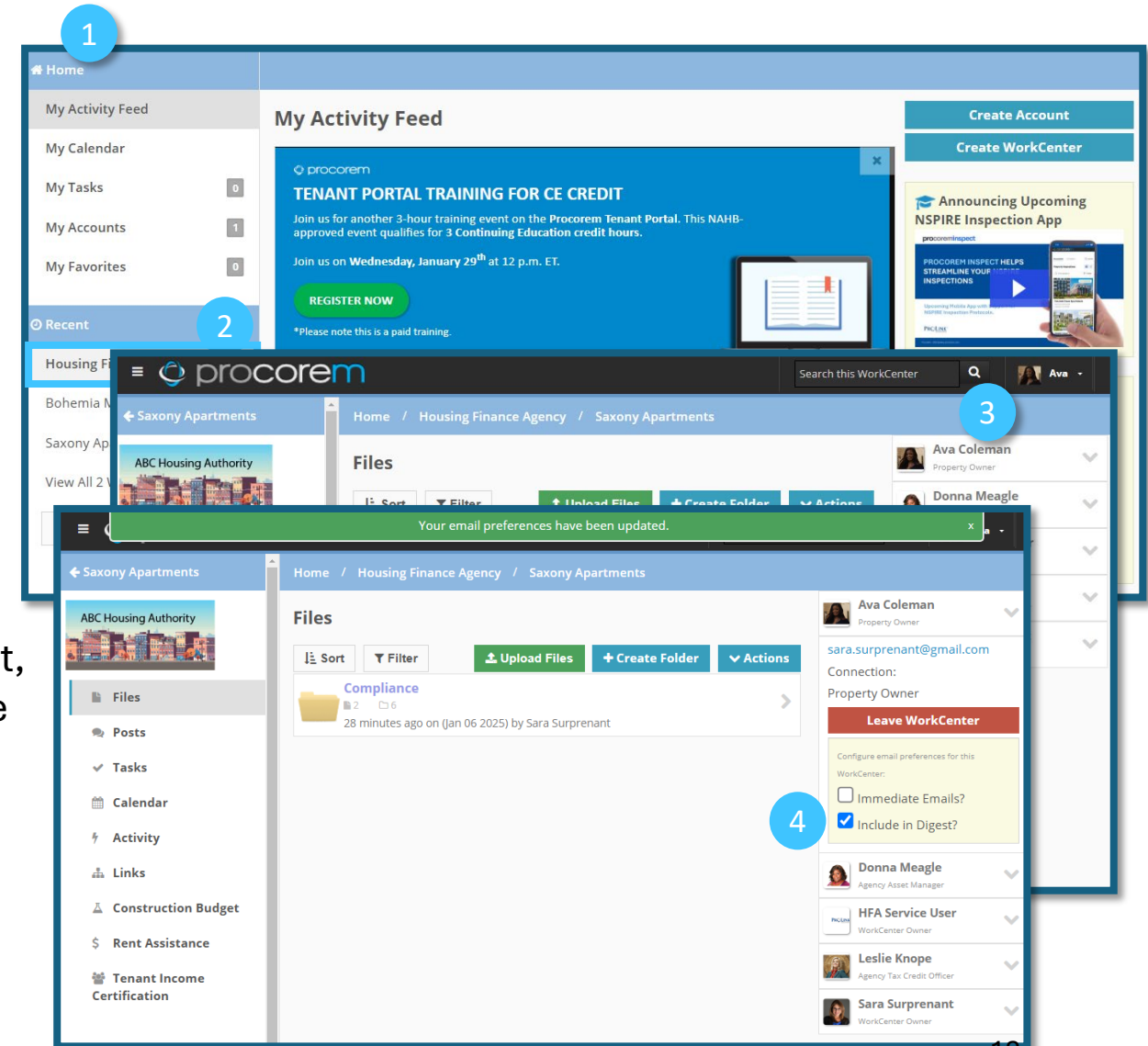
The secure sign in, encrypted files, and invite-only WorkCenters controlled by role-based permissions mean that you can safely collaborate and share files with partners, clients, or family members beyond your firewall.

**Password Requirements:**

- ✓ Cannot contain spaces.
- ✓ Contains at least 1 number.
- ✓ Contains at least 1 capital letter.
- ✓ Contains at least 1 lowercase letter.
- ✓ Must be at least 8 characters long.

## Invitation to Procorem

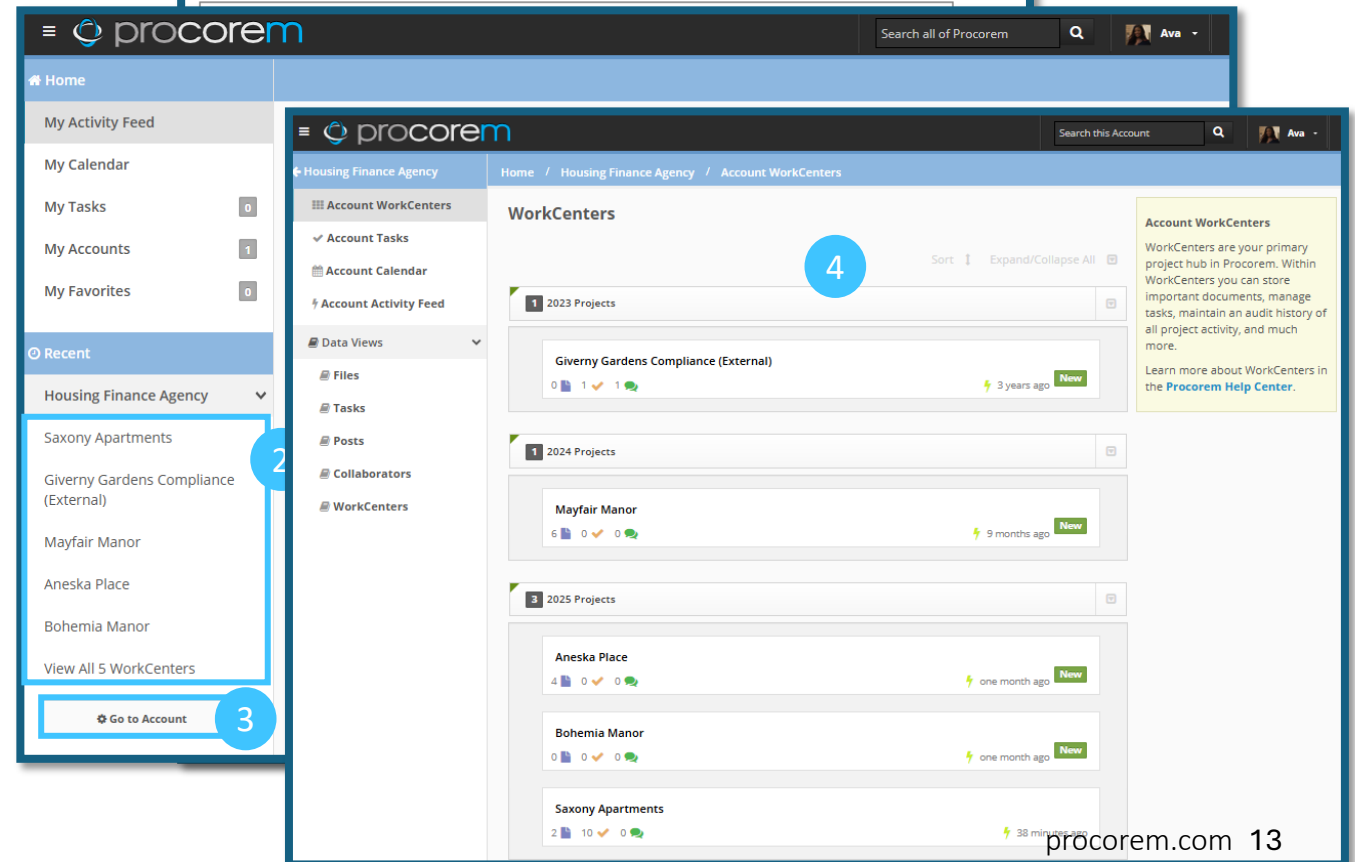
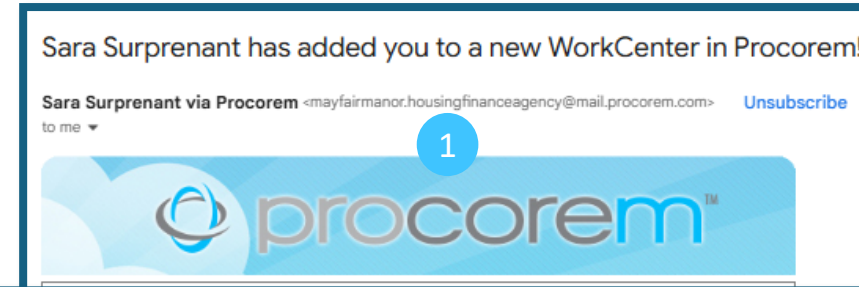
- 1 After clicking **Sign Up Now**, you'll be taken to the **Procorem Home** page.
- 2 On the left, you'll see the name of the **Agency** and the **WorkCenter** representing your property. Click on the name of the **WorkCenter** to access the **WorkCenter**.
- 3 Note other collaborators on the **WorkCenter**, including **Agency** contacts.
- 4 **Procorem** emails notifications in real time for file, post, and **WorkCenter** activities – if you'd like to receive one daily digest email instead of immediate emails, click the down arrow next to your name and deselect **Immediate Emails**.





### Invitation to Procorem

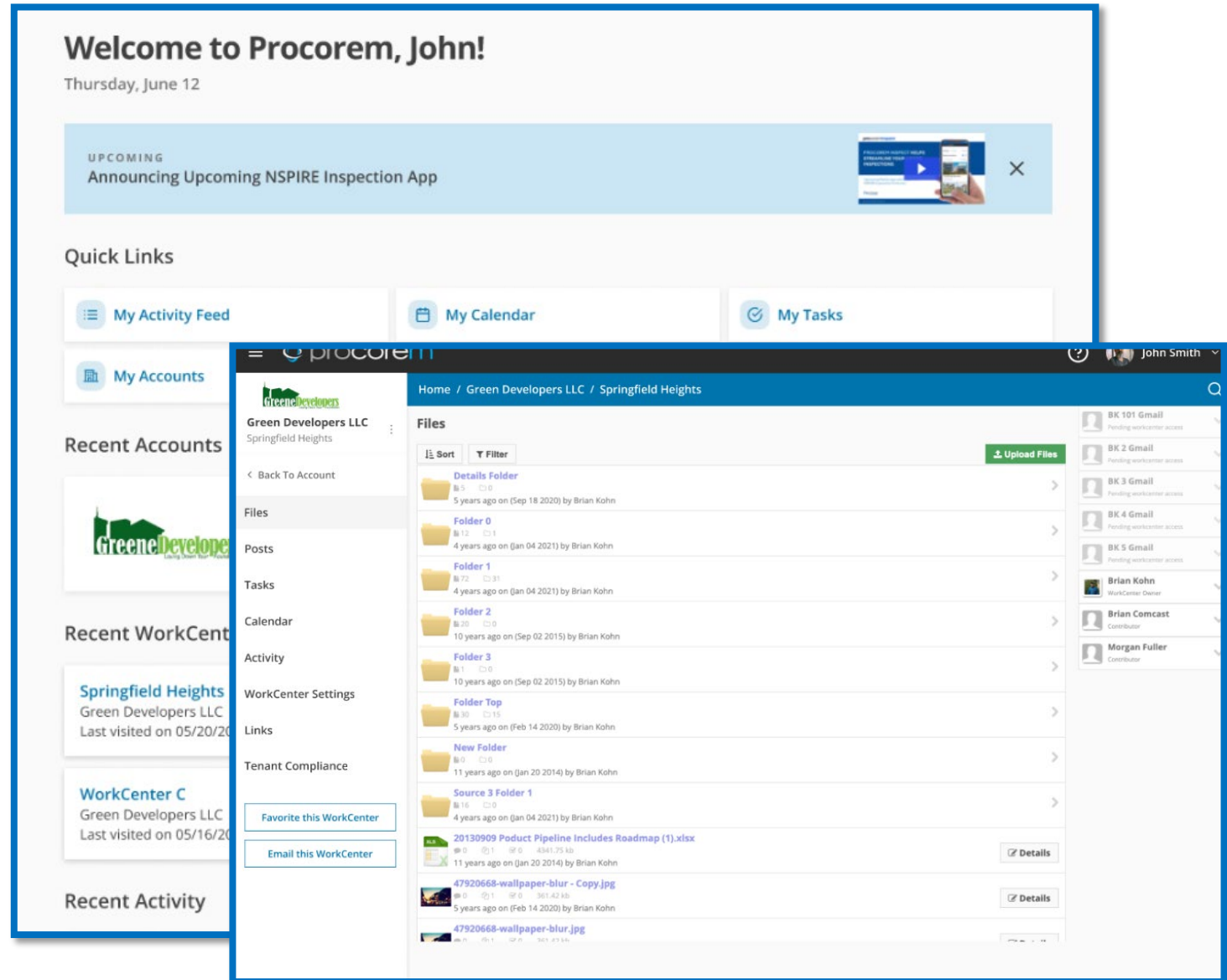
- 1 Once you've created your account, you'll receive an email invitation for each **WorkCenter** you've been invited to.
- 2 When you log in to Procorem, you'll see your **WorkCenter(s)** in the left nav panel.
- 3 To view all your **WorkCenters**, click on **Go To Account**.
- 4 If you don't have access to a needed **WorkCenter**, contact the **Agency** directly to request access.



## 2026 Updates

### Procorem 2.0

In March 2026, updates to Procorem navigation will be available. The home page/dashboard will look and feel different, however, your **WorkCenter** options will look the same.





# QUESTIONS?

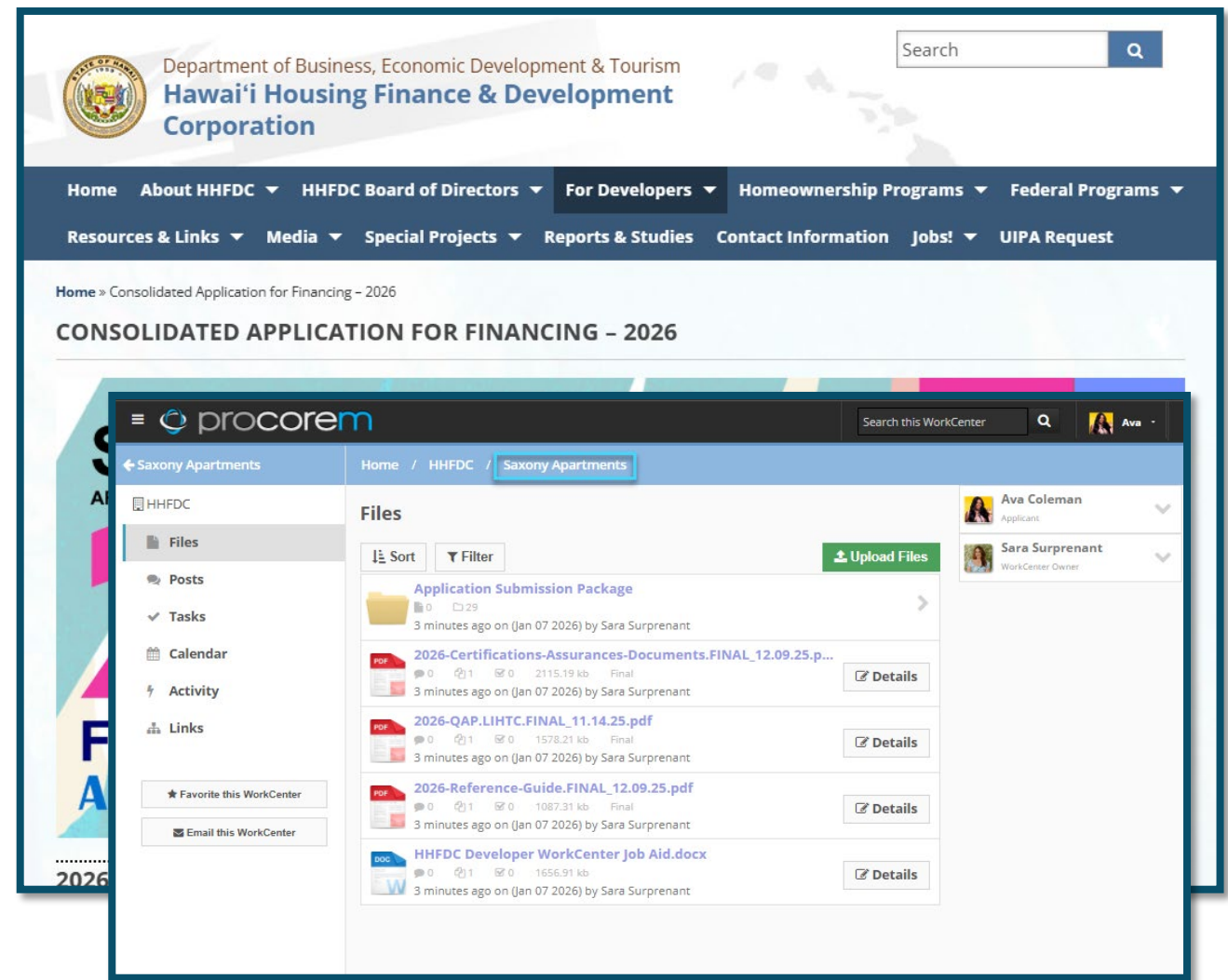
## 03 Accessing the WorkCenter



# Accessing the WorkCenter

Once you've downloaded and completed the **Letter of Intent To Apply** from the **HHFDC** website and notified **HHFDC**, you'll be invited to a Procore **WorkCenter** as a **Collaborator** with a role of **Applicant**.

When you access the **WorkCenter** you've been invited to, you'll land on the **Files** page





## 3. Accessing the WorkCenter

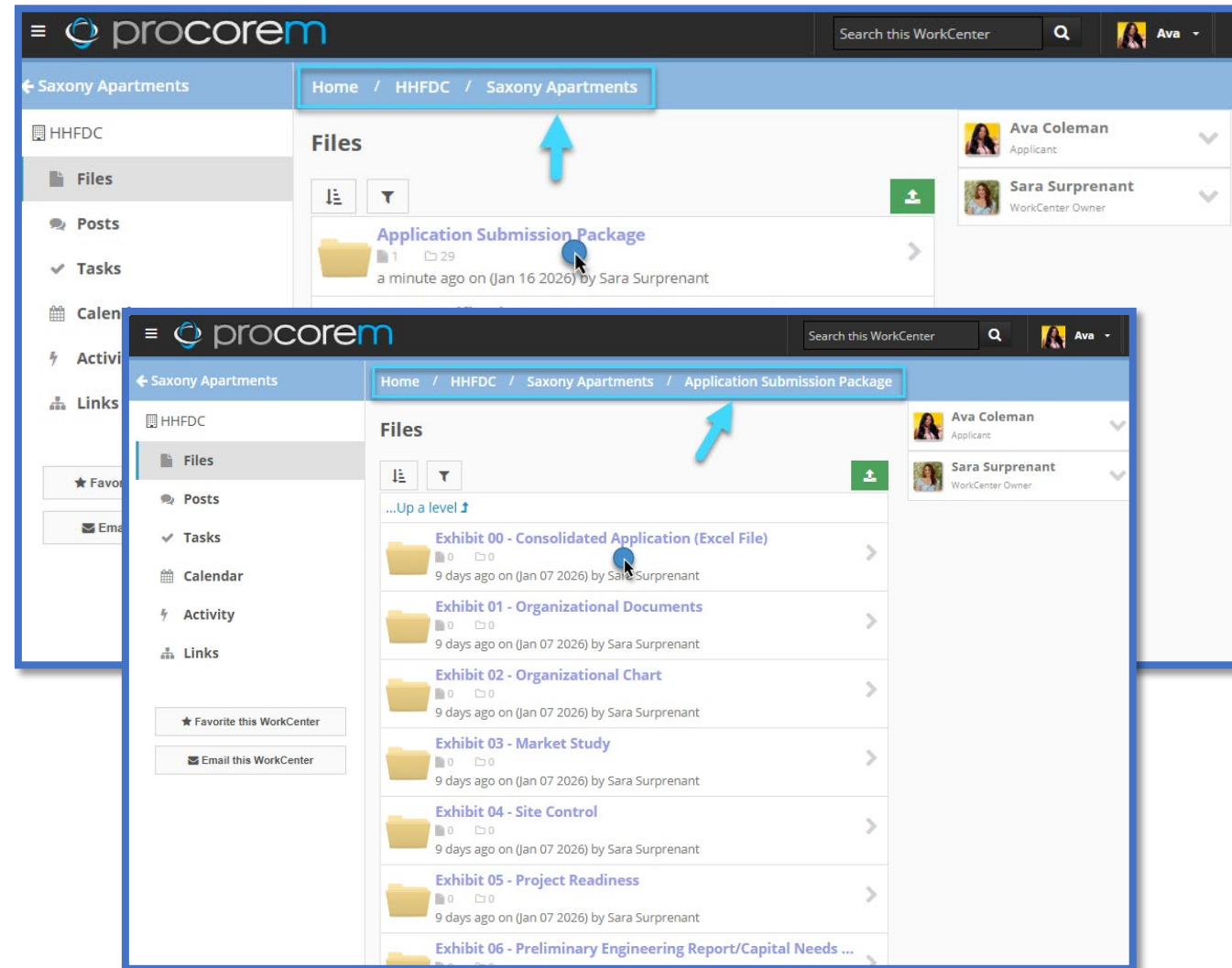
### Files and Folders

You will upload your completed application to the **WorkCenter**.

To find the folder where additional documents should be uploaded, click on the **Application Submission Package** folder.

You'll see the subfolders for **Application Submission Package**. Click on each folder to upload the applicable documents.

Note the **breadcrumb** indicates where you are in the file/folder structure.



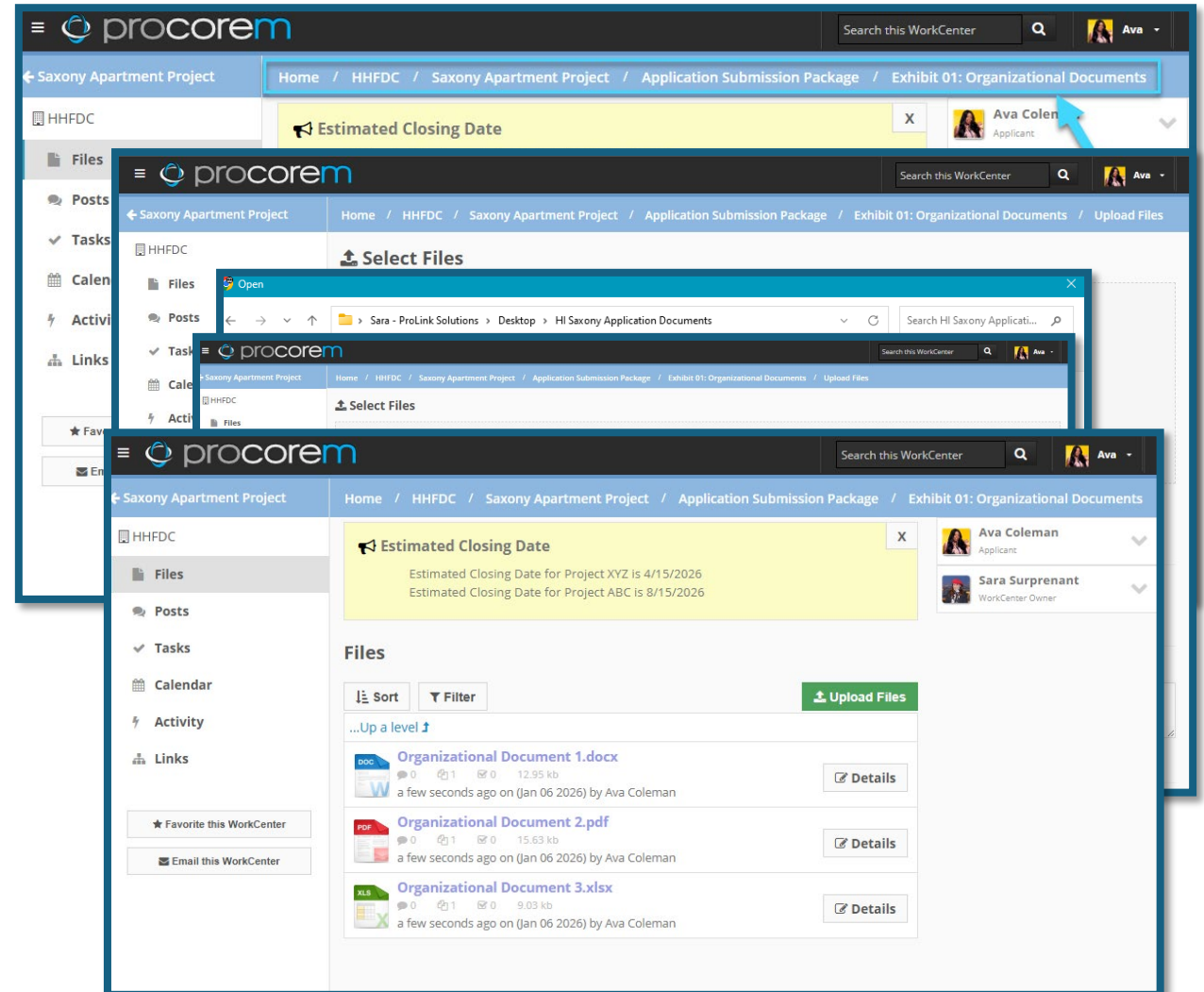
# Uploading Files

Once in the correct folder for the file, click **Upload Files**.

Select **Choose File** or drag/drop from your computer.

The selected files will display on the **Select Files** screen. Click the **Upload** button.

The uploaded files will display.

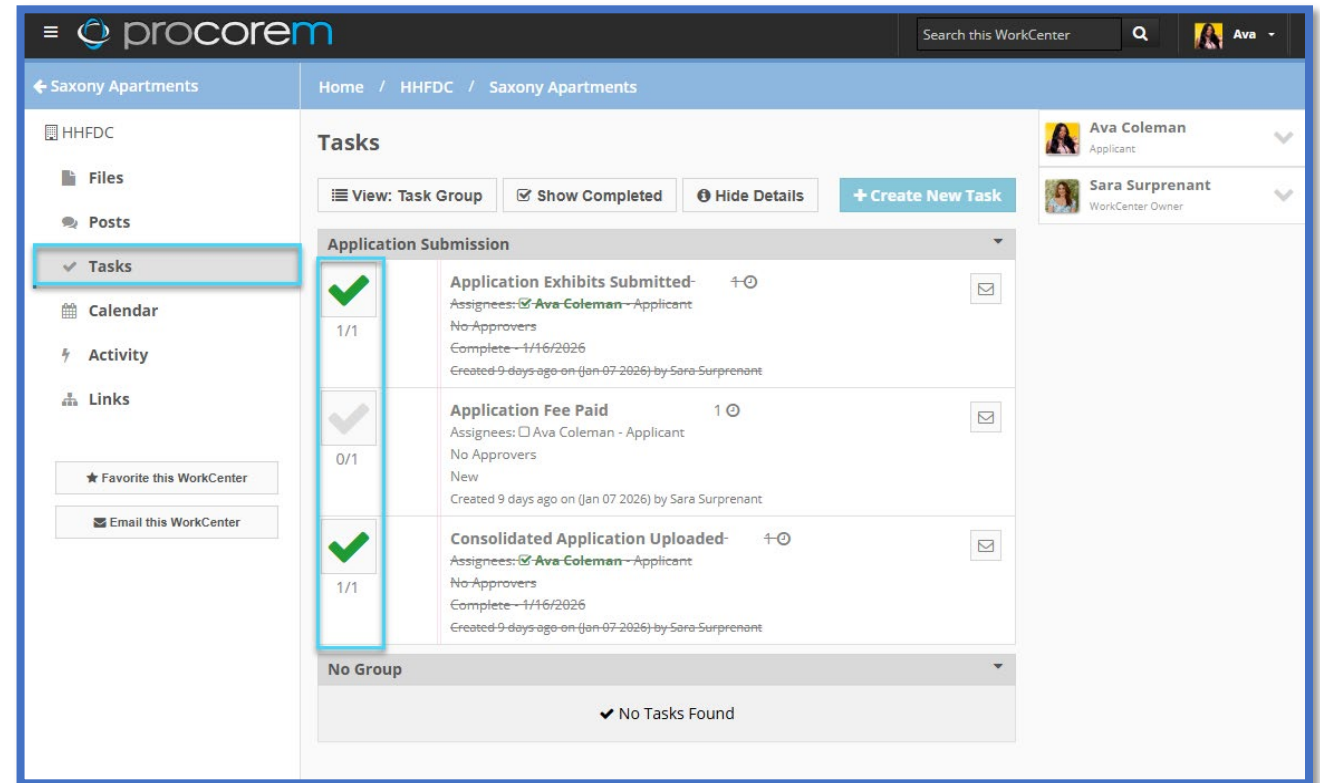


### Tasks

The **Tasks** option will display all tasks related to application submission. You can view tasks assigned to you. **Tasks** should be updated as completed.

Select the checkbox next to each task as you complete the **Application Submission** process. Once completed, the **Task Details** will display in strikethrough font.

**February 20, 2026 at 2pm HST** is the hard deadline for submitting applications/documentations and completing tasks. **You will not be able to upload any documentation after this time as access will be deactivated for applicants!**





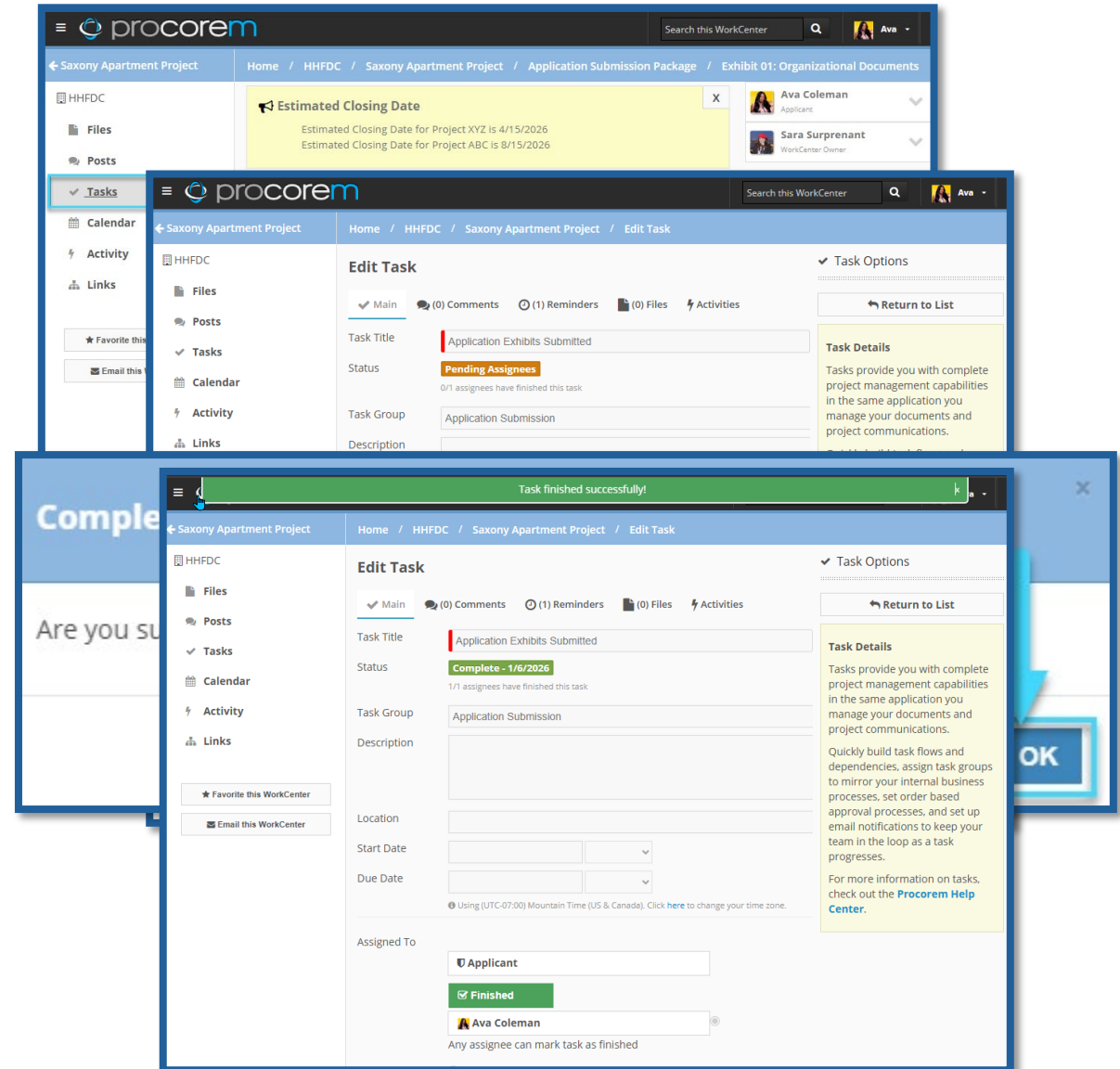
### Completing a Task

Click on the **Task** to view the **Edit Task** screen.

To complete task, click **Mark Finished**.

Click **OK** to complete task or **Cancel** if not ready to complete task.

**Task finished successfully message** will appear when marked finished.



The image displays three overlapping screenshots of the Procore WorkCenter interface, illustrating the process of completing a task.

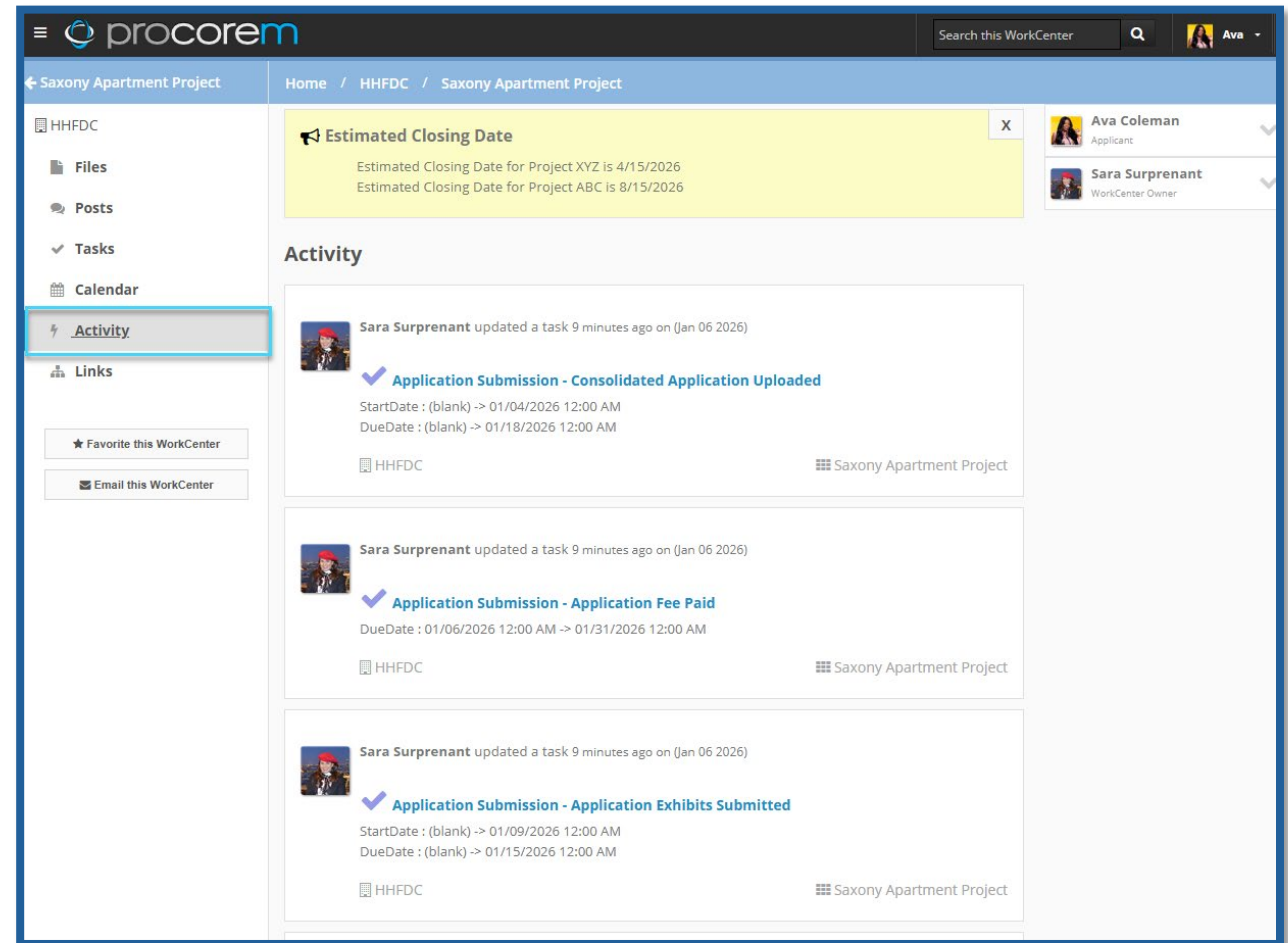
**Top Screenshot:** Shows the 'Saxony Apartment Project' page. The 'Tasks' tab is selected in the left sidebar. A yellow banner at the top indicates the 'Estimated Closing Date' for Project XYZ is 4/15/2026 and for Project ABC is 8/15/2026. The user 'Ava Coleman' is logged in.

**Middle Screenshot:** Shows the 'Edit Task' screen for the task 'Application Exhibits Submitted'. The status is 'Pending Assignees'. The 'Task Options' panel on the right includes a 'Return to List' button and 'Task Details'.

**Bottom Screenshot:** Shows the 'Edit Task' screen after the task has been marked as finished. The status is now 'Complete - 1/6/2026'. The 'Assigned To' field shows 'Ava Coleman' with a green 'Finished' button next to it. A green banner at the top of the page reads 'Task finished successfully!'. A blue 'OK' button is visible in the bottom right corner.

### View WorkCenter Activity

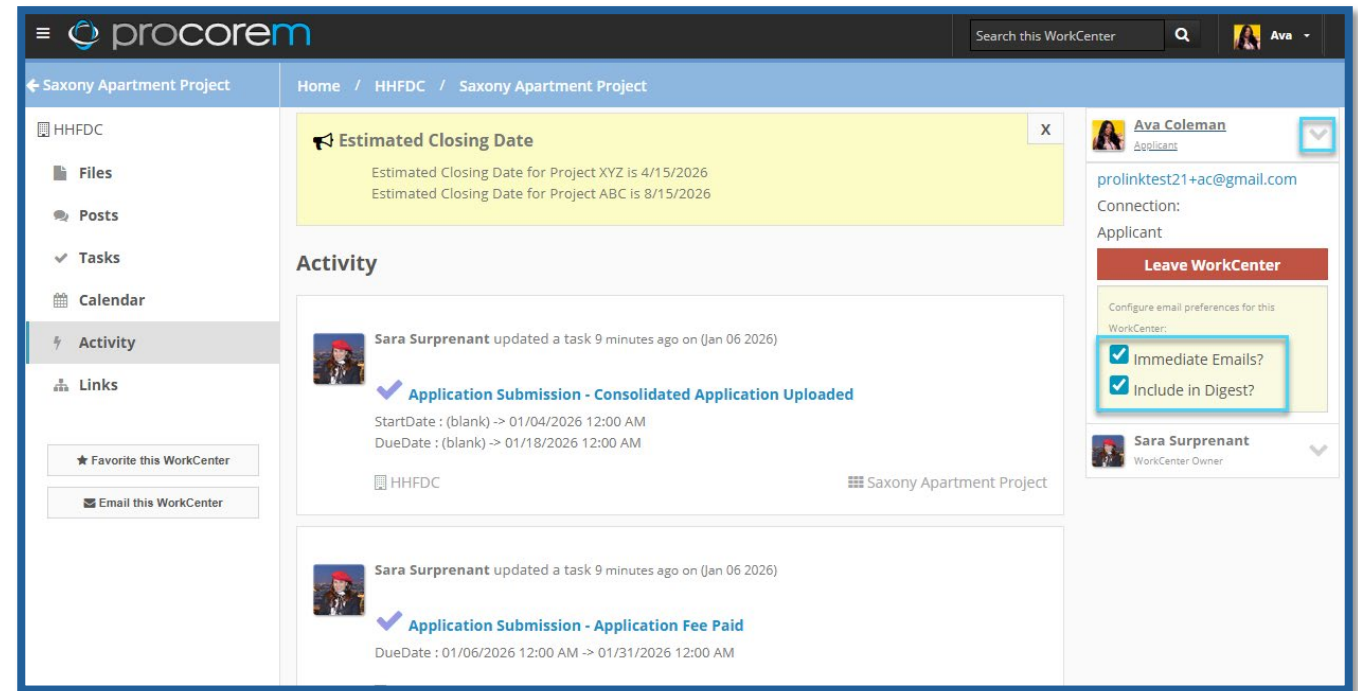
You can view all activity on the WorkCenter by selecting **Activity** in the left navigation panel.



# Update Preferences - WorkCenter

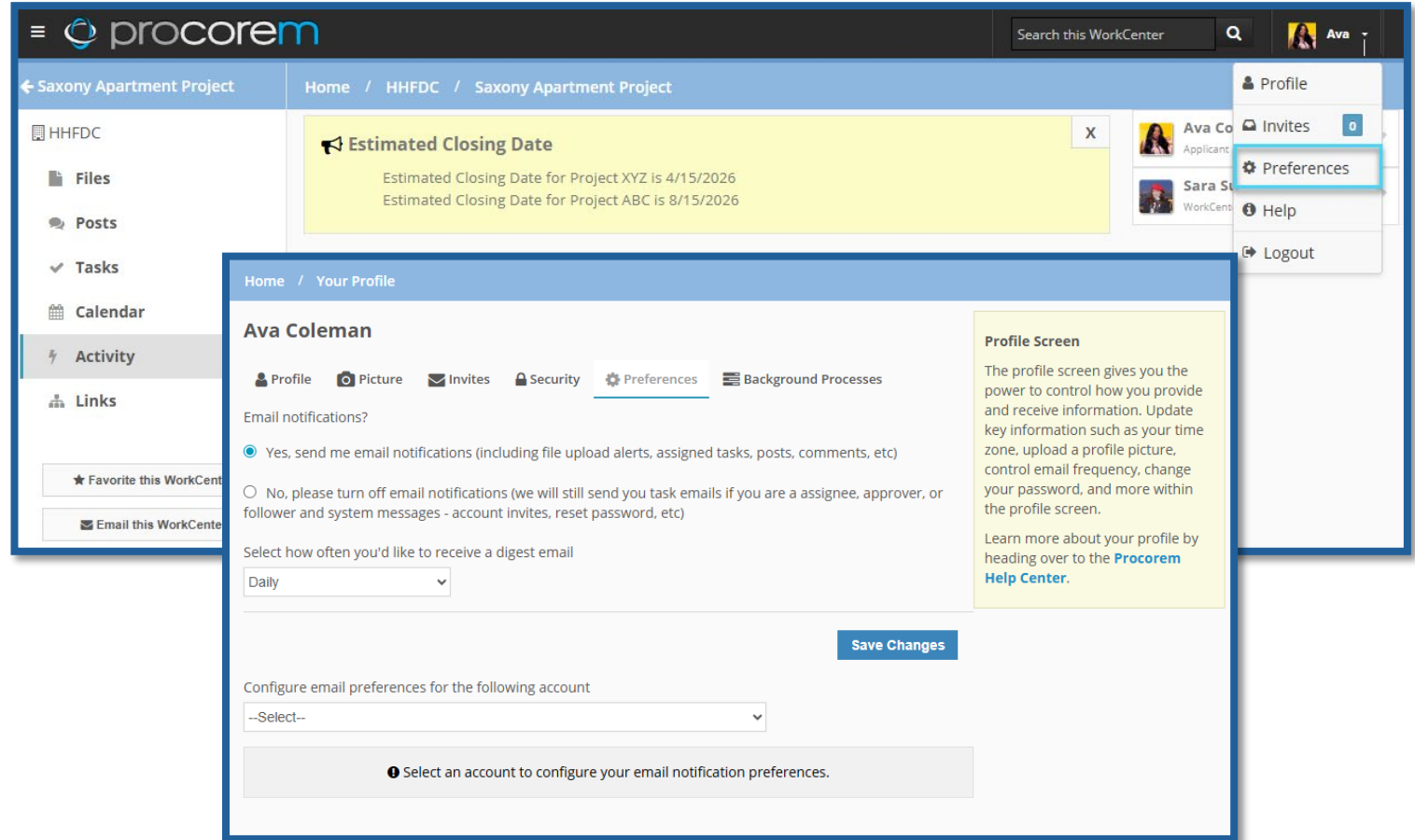
**Immediate Emails**—Selecting the Immediate Emails preference will ensure that you receive email notifications on all WorkCenter related activities. Any time comments are made, tasks statuses change, documents are engaged with, you will receive a notification to ensure you stay informed.

**Daily Digest**—The daily digest provides a summary of all the activity, across all subscribed WorkCenters, in a consolidated email, excluding activity from archived WorkCenters. Once a day, users receive the email which outlines task updates, trending topics and documents, and important project milestones.



# Update Preferences - Profile

You can also update email preferences by selecting **Preferences** under your avatar.



The screenshot displays the Procore WorkCenter interface. In the top right corner, a user's avatar is shown with a dropdown menu containing options: Profile, Invites, Preferences (highlighted with a red box), Help, and Logout. Below the avatar, a yellow banner displays 'Estimated Closing Date' information for two projects. The main content area shows a modal titled 'Home / Your Profile' for 'Ava Coleman'. The modal has tabs for Profile, Picture, Invites, Security, Preferences (active), and Background Processes. Under the 'Preferences' tab, there are sections for 'Email notifications?' with radio buttons for 'Yes' (selected) and 'No', and a 'Select how often you'd like to receive a digest email' dropdown set to 'Daily'. A 'Save Changes' button is located at the bottom right of the modal. A 'Profile Screen' sidebar on the right explains the purpose of the profile screen and provides a link to the Procore Help Center. At the bottom of the modal, there is a dropdown for 'Configure email preferences for the following account' and a message: 'Select an account to configure your email notification preferences.'



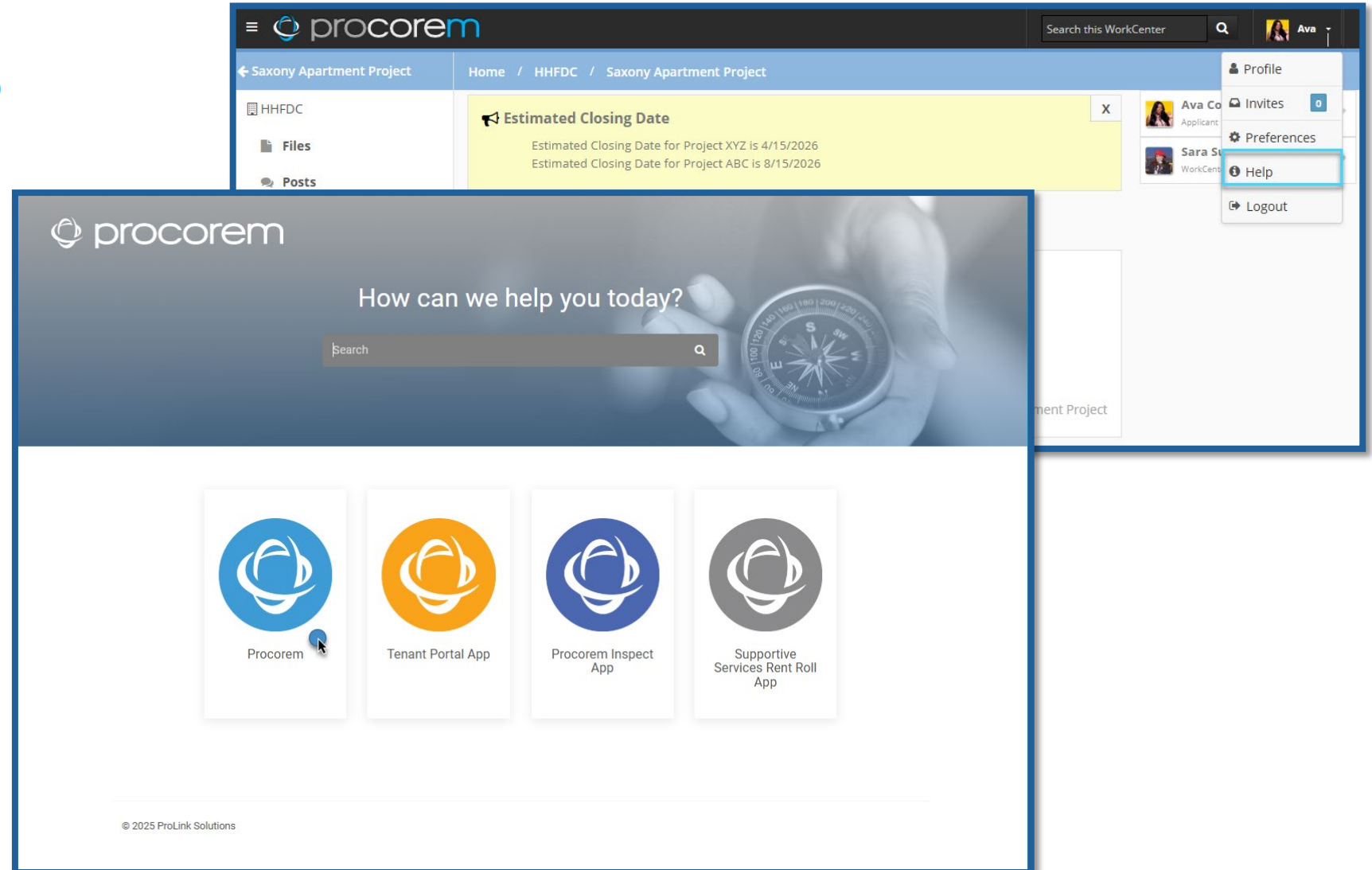


# QUESTIONS?

## 04 Help Center for Procorem

# Procorem Help

You can access the **Procorem Help Center** by selecting **Help** from the menu under your avatar.





# QUESTIONS?





THANK YOU!