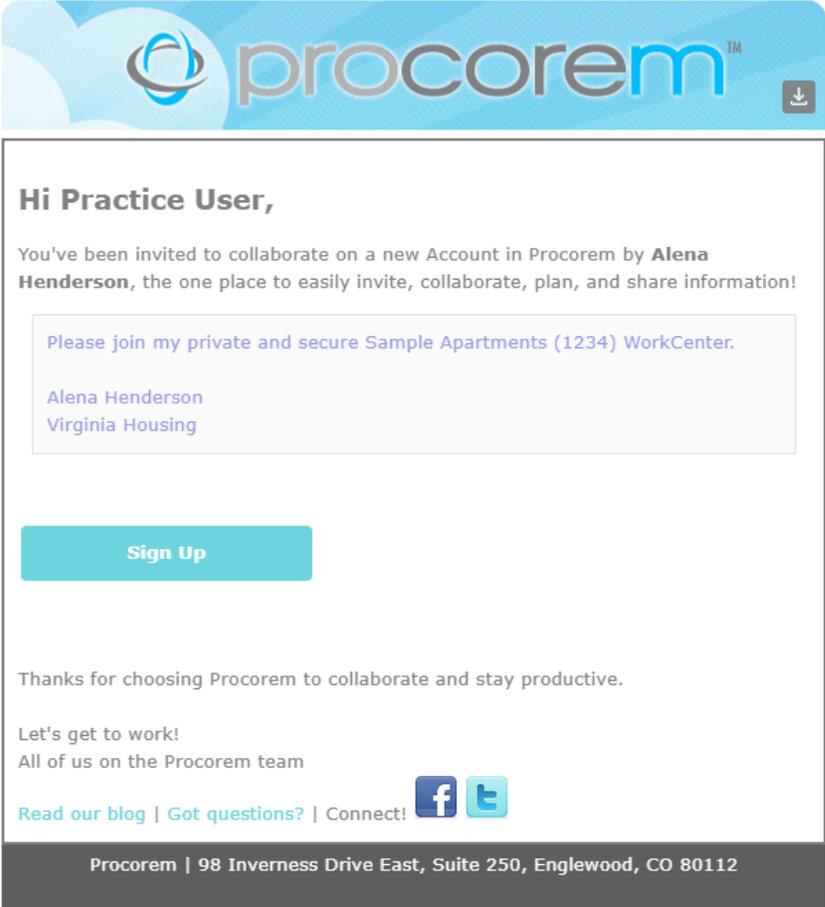
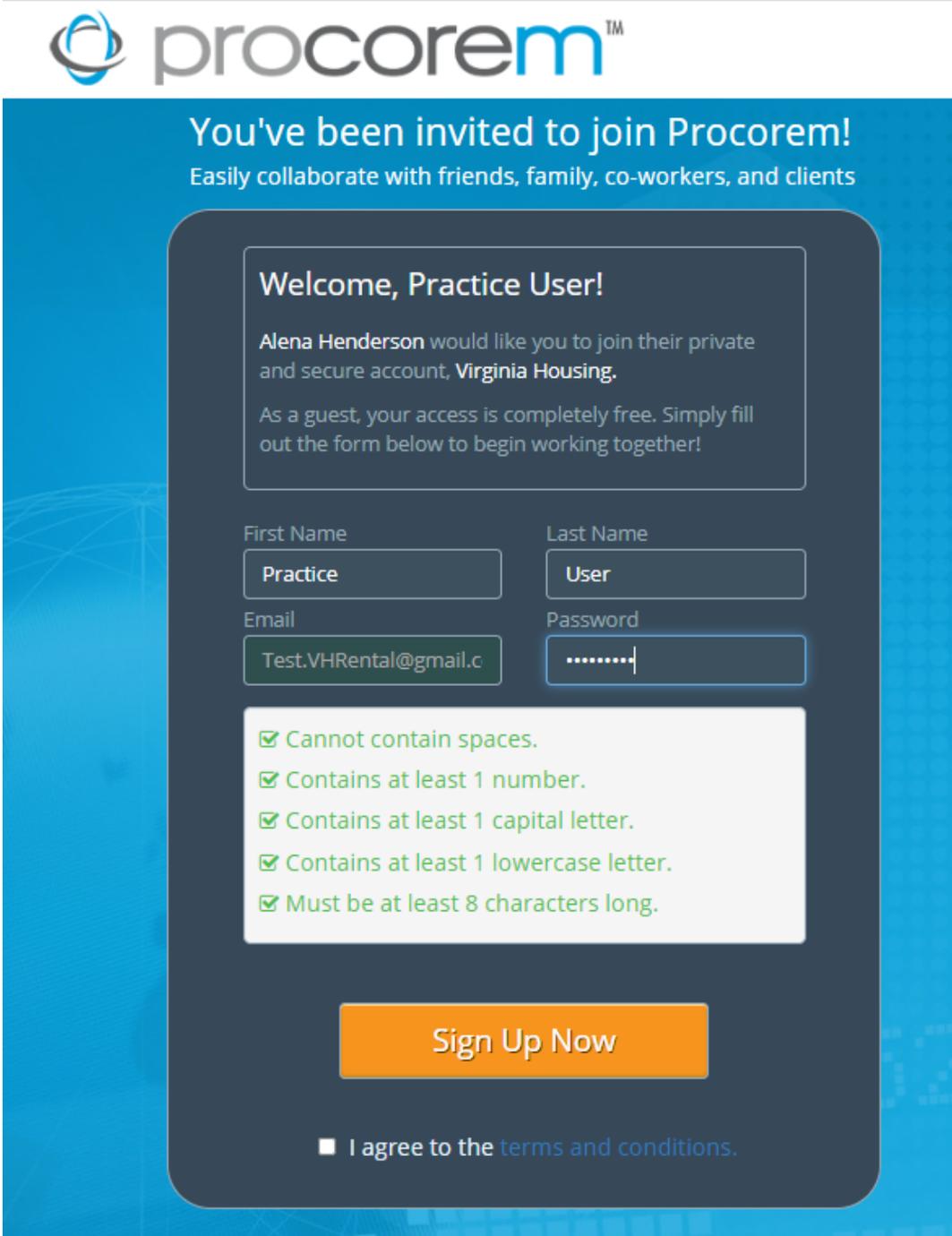


How to Access Procorem.com for Virginia Housing

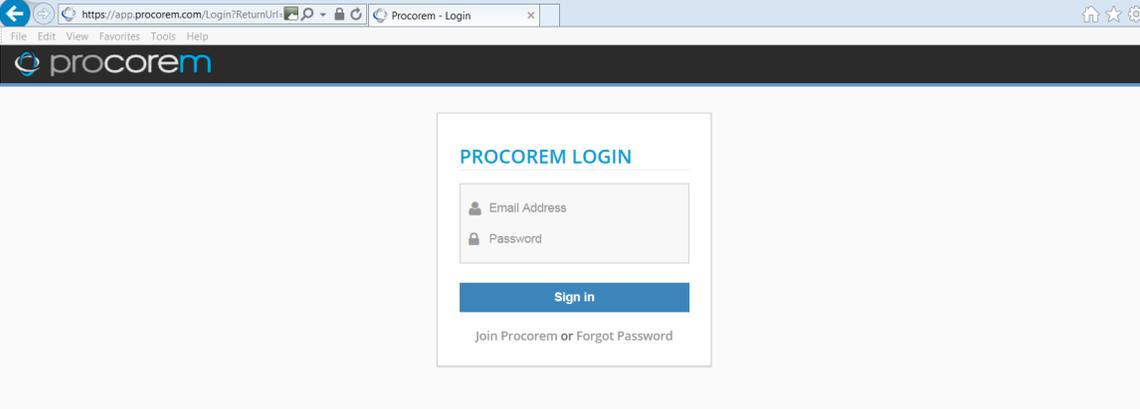
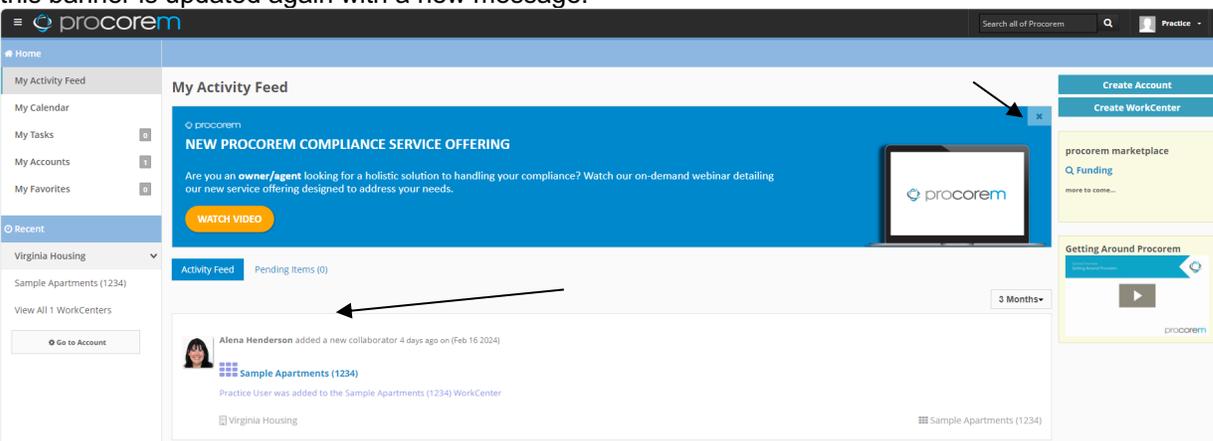
Revised Date	02/20/2024
Purpose	<p>Procorem is a web-based portal that allows safe transmission of files to Virginia Housing. It also hosts the BudgetPro and Tenant Compliance applications.</p> <p>You do not need your own Procorem account. We are inviting you to be a guest on our account.</p>

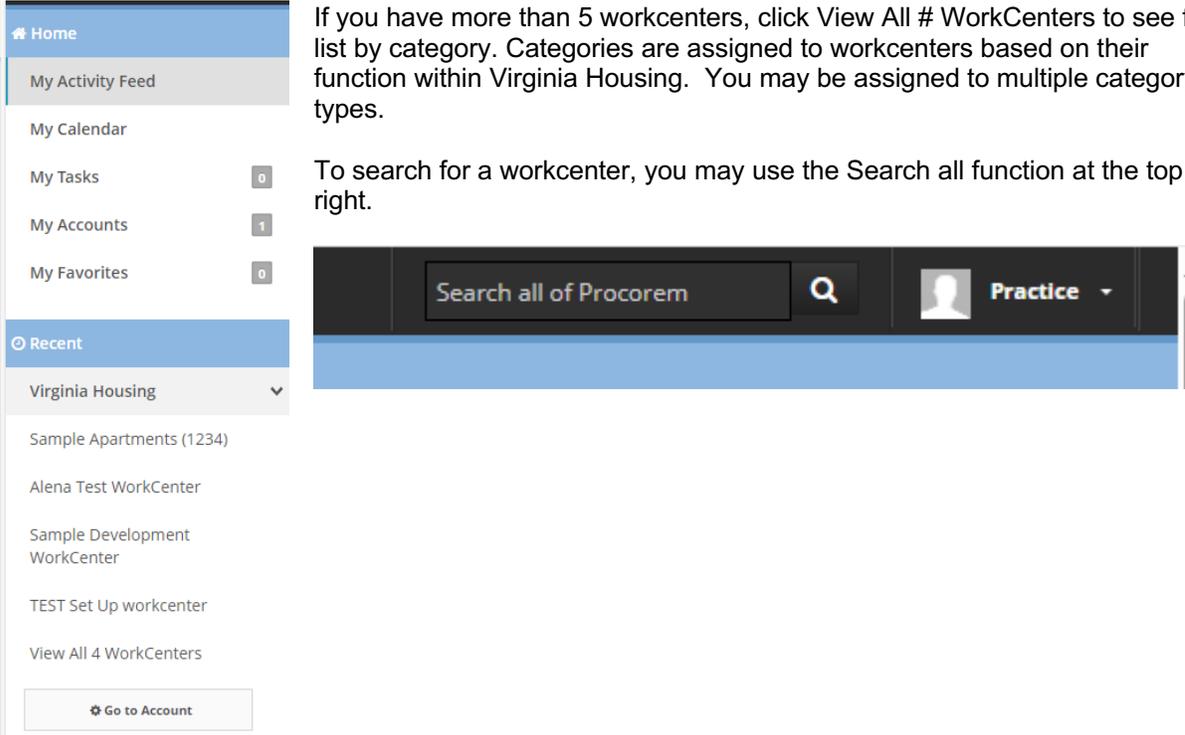
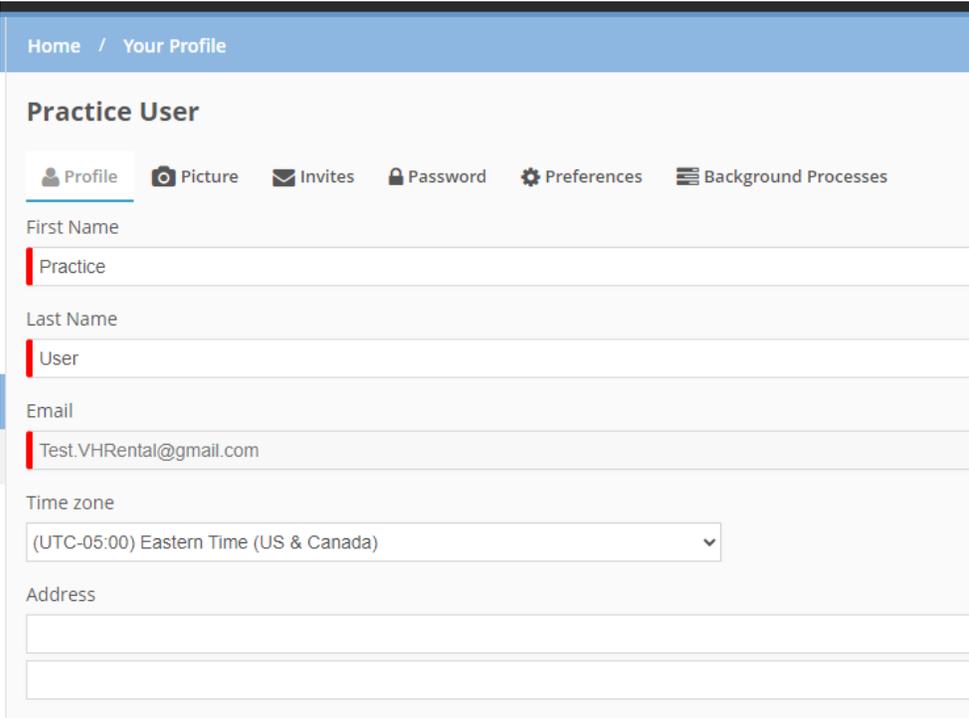
A. Getting Started with Procorem

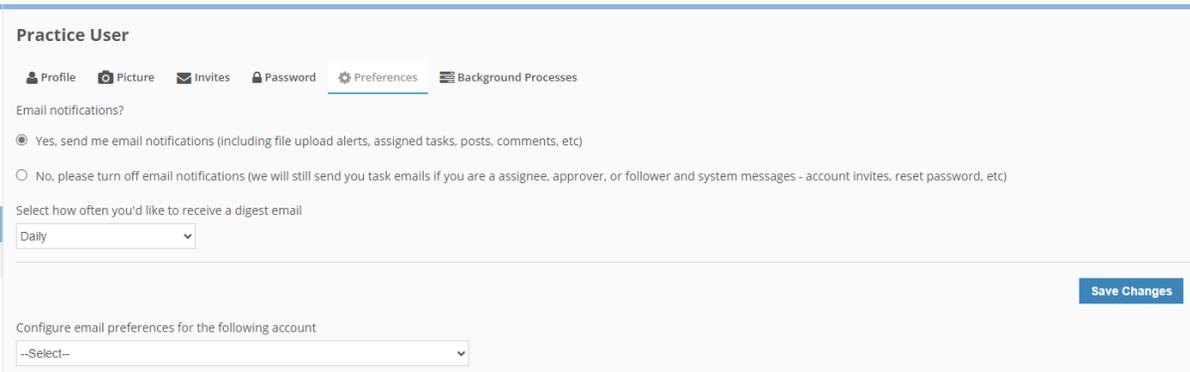
Step	Action
1	You will request access to Procorem in different ways based on the Virginia Housing Rental Housing department that you are working with. Reference the individual process/instructions for details.
2	<p>Once invited to a WorkCenter by a Virginia Housing Associate, you will receive an email inviting you to join Procorem. Please be sure to check your spam folder since this email may be sent there on the first communication.</p> <p>Alena Henderson invited you to collaborate in Procorem! Inbox x</p> <p>Alena Henderson via Procorem <notifications@mail.procorem.com> to Test.VHRental ▾</p> 

Step	Action
3	If you are unable to receive the invitation link, contact your Virginia Housing representative to get a manual link emailed directly to you.
4	<p>Within the email, click on the Sign Up link. You will be navigated to this invitation page.</p> <p>You will see your email address is not editable. You can correct your name if needed and set your own password. As you enter a password, Procorem will indicate with a check as you met the password rule. Once all the rules are checked, click on "I agree to terms" before you click SIGN UP NOW.</p> 

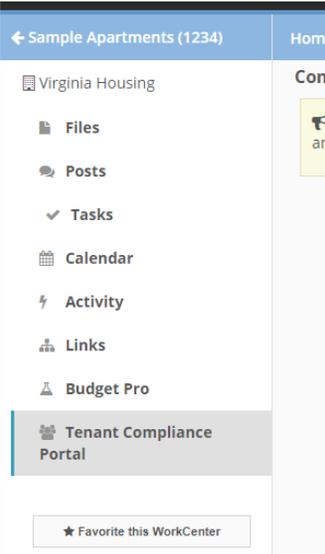
B. Procorem Main Page

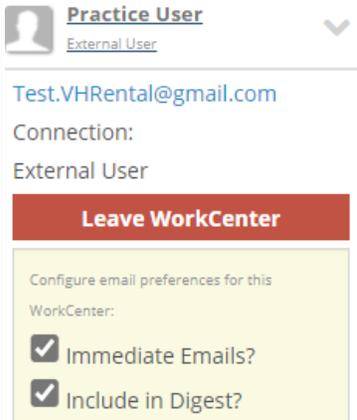
Step	Action
<p>1</p>	<p>Once invitation is complete, you will navigate to the main “My Activity Feed” page of the Virginia Housing Procorem Account.</p> <p>To access Procorem after the first time, go to app.procorem.com. Your email is your username.</p>  <p>Or you can use the Procorem link under Logins on VirginiaHousing.com.</p> 
<p>2</p>	<p>Once invitation is complete, you will navigate to the main “My Activity Feed” page of the Virginia Housing Procorem Account.</p> <p>The My Activity Feed provides a running list of all the activity within any work center you are assigned to.</p> <p>The vendor, Procorem, may display sales or marketing information in the blue banner. This is not information related to Virginia Housing. You can click the X at the top right and it will not display until this banner is updated again with a new message.</p> 

Step	Action
<p>3</p>	<p>On the left menu bar under Recent, you should see options for the last 5 workcenters you have visited. Click on the workcenter you need to access.</p> <p>If you have more than 5 workcenters, click View All # WorkCenters to see full list by category. Categories are assigned to workcenters based on their function within Virginia Housing. You may be assigned to multiple category types.</p> <p>To search for a workcenter, you may use the Search all function at the top right.</p> 
<p>4</p>	<p>To edit your Profile information such as Name, Address, Phone, etc, click on your name/picture at the top right. Your email address is your username. If that changes, contact your Virginia Housing contact. For security reasons, we ask that you do not share accounts.</p> 

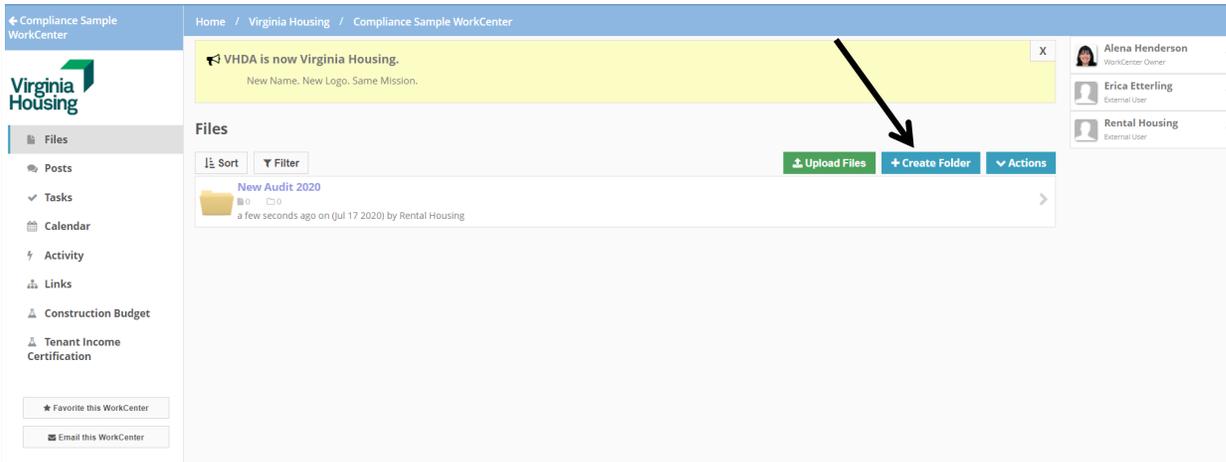
Step	Action
5	<p>Access Preferences within your profile to indicate if you want to continue to receive the Digest emails that list selected activities that occur within a workcenter. This is separate from the notification emails you would receive as files are loaded or comments posted.</p> 

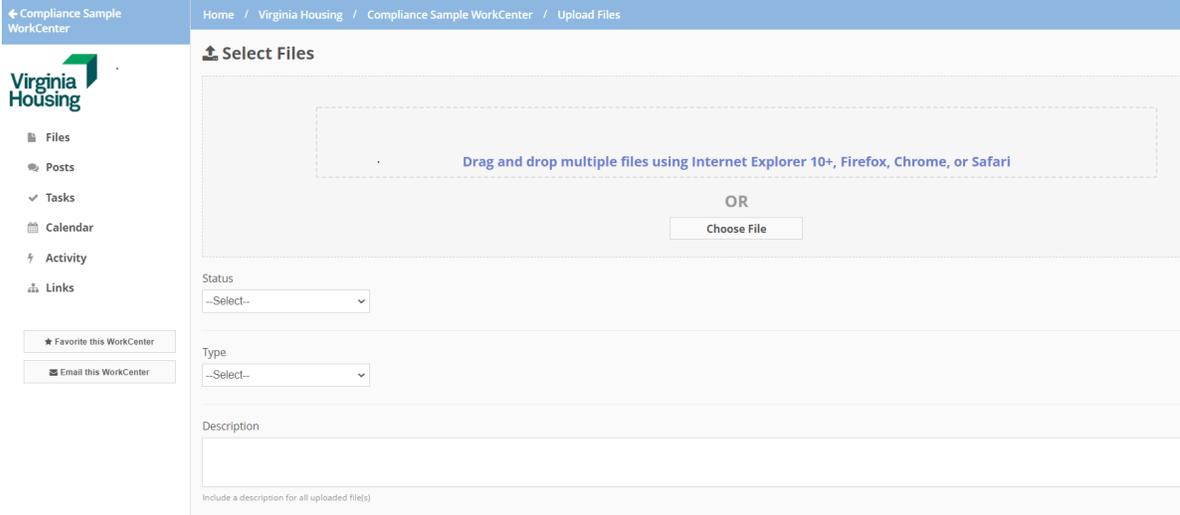
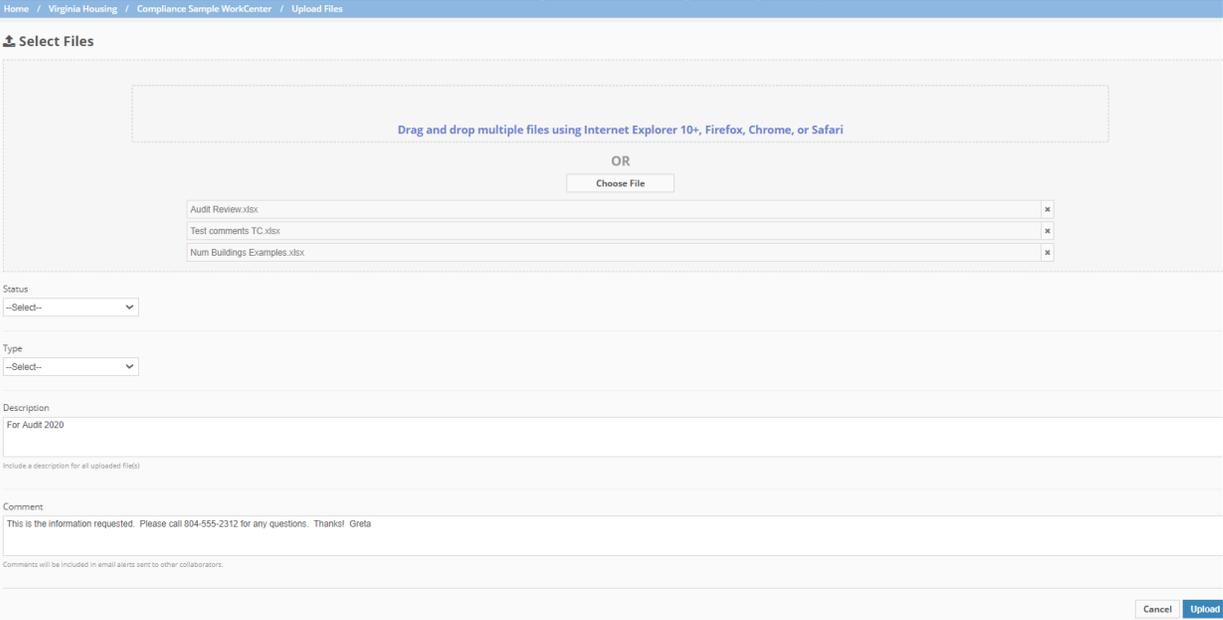
C. Functions Within an Assigned WorkCenter

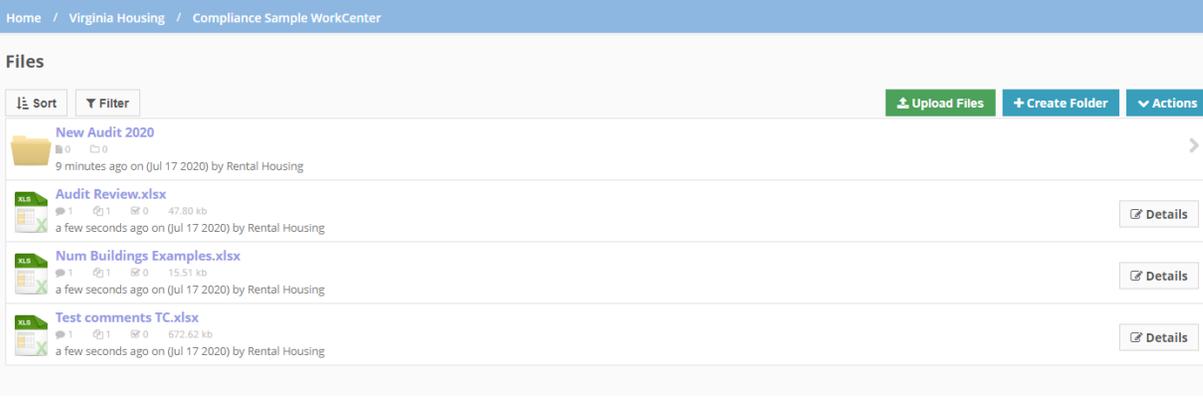
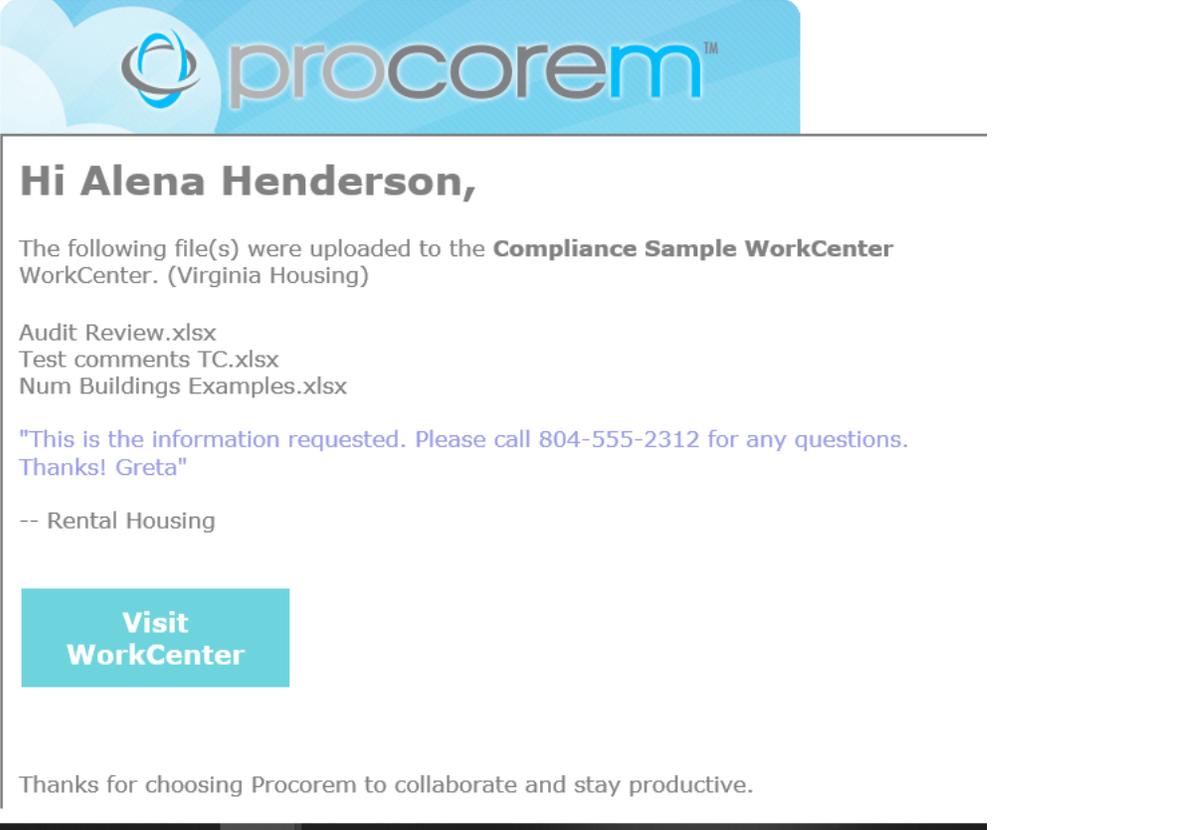
Step	Action
1	<p>Based on the Category, the workcenter landing page may be Files, BudgetPro or Tenant Compliance.</p>  <p>You can always navigate to the other areas from the left menu.</p> <p>Files - Where files are uploaded and where you can see the other collaborators with access to this workcenter.</p> <p>Posts – Messages back and forth to other collaborators. All collaborators can see messages.</p> <p>Tasks – Functionality to track assigned tasks. Virginia Housing does not utilize this function at this time.</p> <p>Calendar - Functionality to track task due dates. Virginia Housing does not utilize this function at this time.</p> <p>Activity - provides Activity Feed for only this work center.</p> <p>Links – displays links to other workcenters where necessary.</p> <p>BudgetPro - Only available for Construction Budget Workcenters</p> <p>Tenant Compliance Portal – Only available for Tenant Compliance Workcenters.</p>
2	<p>If you are assigned to many workcenters, you can click on Favorite this WorkCenter to add to the My Favorites list on the Home Menu.</p>

Step	Action
3	<p>From Files, you can see the list of Collaborators on the right panel. If you want to remove yourself from a workcenter, click on your name and click Leave Workcenter. You can also control your email/digest functions for this individual workcenter.</p> 

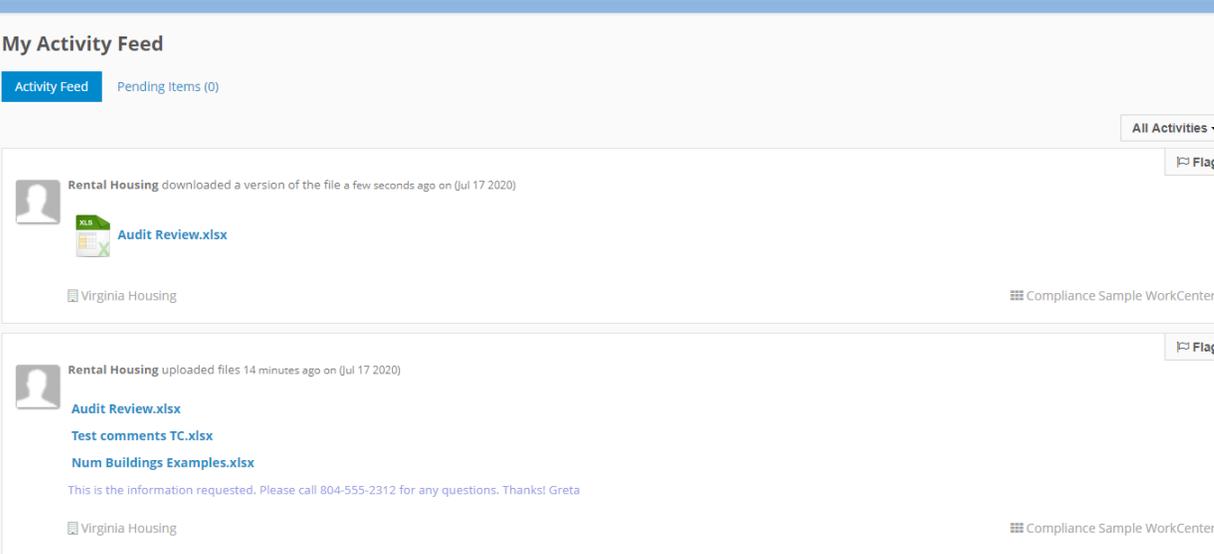
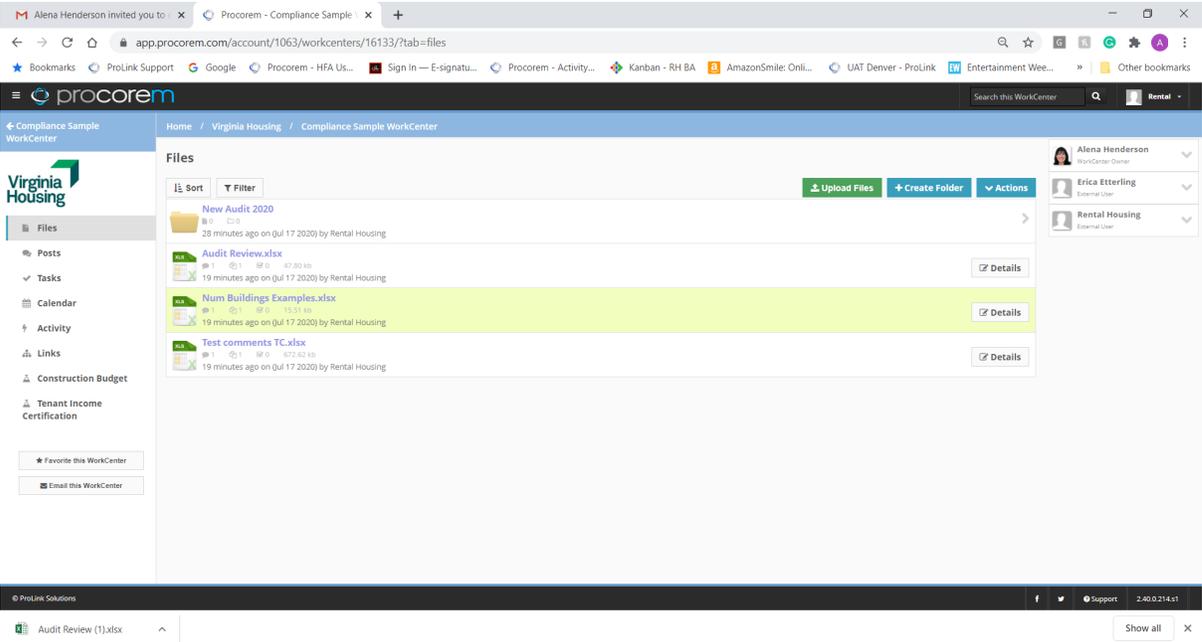
D. Files Transfer

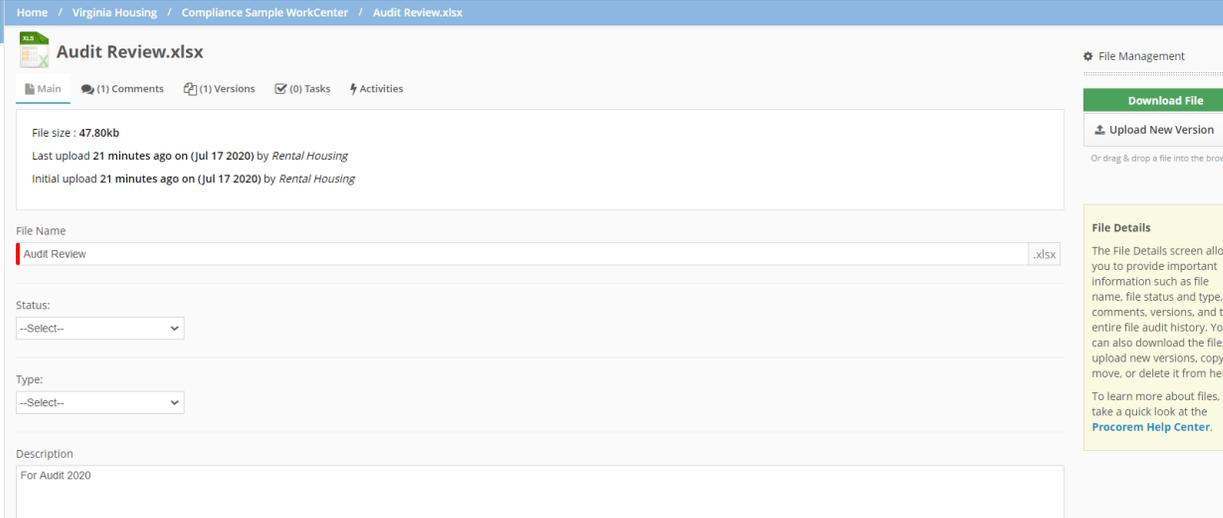
Step	Action
4	<p>For the purposes of file transfer, you should select the Files option on the left menu. Some folders may already be available for you or you can create a new folder. Folders are not required to send information – only for organizing. Click to open the appropriate folder. Screen will display all files included at this level of the system.</p> 

Step	Action
<p>5</p>	<p>Click Upload Files at the top of the screen to add one or more files. A new window will appear. You can drag files into the section provided or click on Choose File to gain access to your Windows Explorer to select the file from your computer.</p> <p>Note: Clicking on the breadcrumbs (or titles in blue) can help navigate to other areas of the system.</p> 
<p>6</p>	<p>You may load one or more files at a time.</p> <p>You may add a description that will remain with the file in the work center. You may also add a comment that will accompany the notice to Virginia Housing that you uploaded a file.</p> 

Step	Action
7	<p>Click Upload at the bottom of the page. You will see a message at the top of the page indicating that the file has been uploaded.</p> <p>You will be returned to the folder. You should see your file(s) there.</p> 
8	<p>If you need to replace a file, you may upload the file again with the same name and it will create a new version. Or you may contact Virginia Housing delete it.</p>
9	<p>Once your files are uploaded, an email will automatically go to our staff notifying them that the file(s) are available. You will also receive a copy of this email.</p> 
10	<p>You will see that we downloaded files from the Activity Feed when you first log into Procorem.</p>

E. Working with Files from Procorem

Step	Action
<p>1</p>	<p>Once Files are loaded, any collaborator on the account with File rights can download files.</p> <p>You can see that we downloaded files from the Activity Feed when you first log into Procorem or from within the Activity option on the left panel of the workcenter.</p> 
<p>2</p>	<p>To download a file, access the workcenter. Highlight the row of the file you want and then click. The file will download based on your browser or laptop settings.</p> 

Step	Action
<p>3</p>	<p>To update the details of the file or see previous versions, click on Details.</p> 
<p>4</p>	<p>Click Upload New Version to replace the existing version with an updated one. The previous will be available under the Versions tab, but the main Files screen will only download the most current. (Updating a version will trigger an email to all collaborators.)</p>
<p>5</p>	<p>Click on the Comments tab if you want to make comments or respond to comments about this file. (Adding a comment will trigger an email to all collaborators with a link to enter a response.)</p> 