



Conceive. Construct. Connect.

Procore Training –

How to use the Punchlist Tool in Procore:

Configure a punch list template

1. Open Project & select the Punch list tool
2. Click on: Settings (the Gear Icon to the left of the word “Punch list”)
3. Click on: Punch list templates (right side of screen)
4. Assign the punch item Manager (Superintendent)
5. Assign the punch item final approver (PM)
6. Assign a default final approver (if necessary)
7. Designate an Assignee per trade or add an Assignee per trade if the appropriate person is not part of the drop down list.
8. Uncheck an entire category if it does not apply to your project.
9. Create a custom category(s) if needed.

How to create a punch list item from the mobile app

1. Open Project & select the Punch list tool
2. Click on the orange “+” icon
3. Choose a punch list template category or Create without a Punch item without a template
4. Add a photo or other attachment as reference
5. Fill in a title
6. Make sure the Punch Manager and final approver are designated
7. Select an assignee(s)
8. Select the PM on the distribution
9. Due date
10. Location
11. Trade
12. Click “Save & Finish” or “Save & New”Both will send an email notification of the punch item to the assignee.



Conceive. Construct. Connect.

How to create a punch list item from the mobile app and using the drawings tool

1. Open Project & select the Drawings tool
2. Select drawing and drop a “punch pin” into the drawing.
3. Use punch template that have been previously configured.
4. Enter location
5. Enter type of punch item
6. Add description
7. Add photo
 - a. Use photo mark-up tool to clarify the area involved.
8. Click “Save” to send the punch list item to the designated assignee.

Remember to use “Procore Support” to view multiple topics relating how to use the Procore.

<https://support.procore.com/>