

How to Respond to an RFI in Procore

This guide walks you through the full RFI workflow in Procore, from creating and distributing a Request for Information to learning how to respond to an RFI in Procore once it has been assigned to you. Following these steps ensures that your RFI is properly created, tracked, and resolved, with all responses logged automatically.

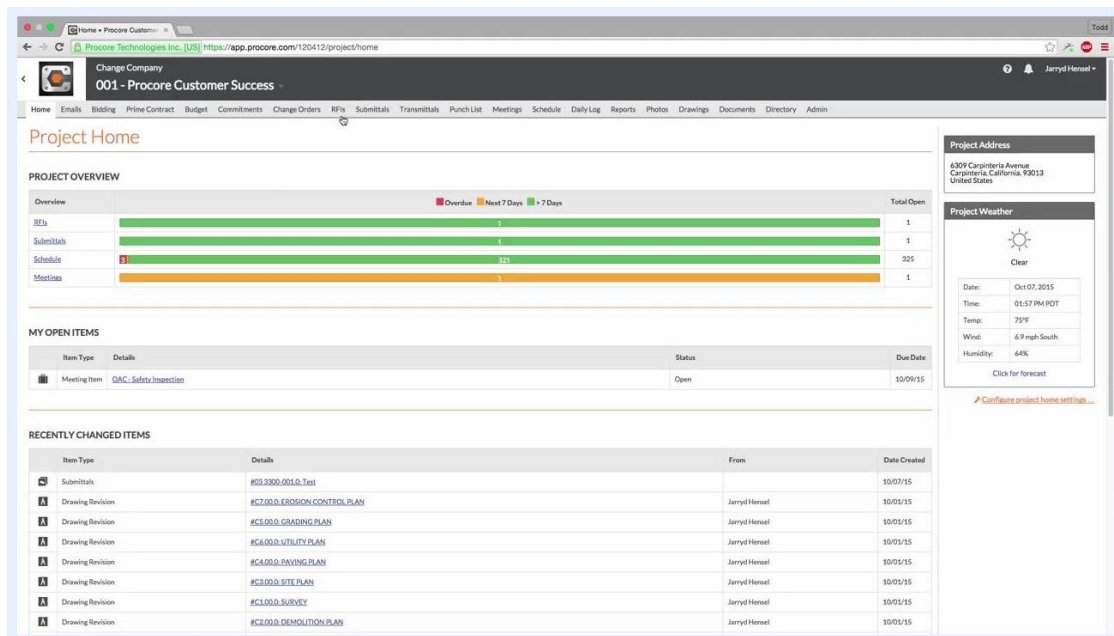
Prerequisites

- Access to the **RFIs** tool within your Procore project.
- Permission to create RFIs or admin permission to manage and close them, depending on the task.
- Knowledge of who should be assigned to answer the RFI and who should receive updates.

Navigate to the RFI tool

Step 1: Open the RFI tool

From the **Project Home** screen, locate the top navigation bar and click the **RFIs** tab to open the RFI tool.



Project Home screen with the navigation bar, cursor hovering over the "RFIs" tab. Project overview, open items, and recently changed items are visible.

Step 2: Create a new RFI

On the RFI tool page, click the orange **Create RFI** button on the right side of the screen to start a new request.

Fill out the RFI information

Step 3: Enter the RFI details

On the **New RFI** screen, complete the following fields:

- **RFI #:** Enter the RFI number (for example, 5).
- **Subject:** Enter the subject of the RFI (for example, "Pavement Deletion at Ramp").
- **Assigned To:** Start typing and select the person responsible for answering the RFI (for example, Lyons, Brett).
- **Due Date:** Set the due date (for example, 10/10/2015). Procore automatically assigns a due date if you leave this blank. If the assignee does not reply by this date, Procore can send overdue email notifications automatically.
- **Question:** Enter the RFI question in the text area at the bottom of the form. For example: "Due to logistical issues with placing asphalt beneath the ramp per A2.1, please confirm replacing with a CIP SOG is acceptable. LA please confirm detail and thickness."

- **Draft:** Check the **Draft** box if you want to save the RFI to complete or send later.

The screenshot shows the Procore Project Home interface for project 001 - Procore Customer Success. The top navigation bar includes links for Home, Emails, Bidding, Prime Contract, Budget, Commitments, Change Orders, RFIs, Submittals, Transmittals, Punch List, Meetings, Schedule, Daily Log, Reports, Photos, Drawings, Documents, Directory, and Admin. The main content area is divided into three sections: Project Overview, My Open Items, and Recently Changed Items. The Project Overview section shows a bar chart for RFIs, Submittals, Schedule, and Meetings. The My Open Items section shows a table with one item: Meeting Item, OAC - Safety Inspection, Open, 10/09/15. The Recently Changed Items section shows a table with eight items, all created on 10/07/15, including Submittals and Drawing Revisions for various plans like EROSION CONTROL PLAN, GRADING PLAN, UTILITY PLAN, PAVING PLAN, SITE PLAN, SURVEY, and DEMOLITION PLAN.

Item Type	Details	Status	Due Date
Meeting Item	OAC - Safety Inspection	Open	10/09/15

Item Type	Details	From	Date Created
Submittals	#03.000.001.0 Test		10/07/15
Drawing Revision	#C7.000.0 EROSION CONTROL PLAN	Jarryd Hensel	10/01/15
Drawing Revision	#C8.000.0 GRADING PLAN	Jarryd Hensel	10/01/15
Drawing Revision	#C9.000.0 UTILITY PLAN	Jarryd Hensel	10/01/15
Drawing Revision	#C4.000.0 PAVING PLAN	Jarryd Hensel	10/01/15
Drawing Revision	#C1.000.0 SITE PLAN	Jarryd Hensel	10/01/15
Drawing Revision	#C1.000.0 SURVEY	Jarryd Hensel	10/01/15
Drawing Revision	#C2.000.0 DEMOLITION PLAN	Jarryd Hensel	10/01/15

New RFI creation screen showing fields for RFI #, Subject, Assigned To, Due Date, and the Draft checkbox. The Subject field is filled in as "Pavement Deletion at Ramp".

Step 4: Specify the responsible contractor and question source

In the **Responsible Contractor** field, select the company or person responsible for the issue (for example, Cardinal Concrete, LLC.). In the **Question Received From** field, select the company or person who originally asked the question or who needs to be notified once it is answered.

The screenshot shows the 'New RFI' form in the Procore system. The 'Responsible Contractor' dropdown is open, displaying a list of vendors. The 'Question Received From' field is highlighted with a red box. The form includes fields for RFI #, Subject, Assigned To, Due Date, Location, and various checkboxes for Draft, Private, and Overdue Notifications. The 'Question' field at the bottom is empty.

New RFI screen with the Responsible Contractor dropdown open, showing a list of companies, and the Question Received From field highlighted.

Keep in mind that vendors or people entered in the **Responsible Contractor** or **Question Received From** fields will **not** be copied on any RFI emails.

In the **Distribution** field, add any team members who should receive all RFI correspondence. These members can comment directly via the RFI email they receive.

New RFI screen with the Distribution field open, showing user selection options and an orange arrow pointing to the field.

Complete any of the following fields as needed for your project:

- **Drawing Number:** Enter if applicable.
- **Spec Section:** Select the relevant specification section and provide a description.
- **Schedule Impact:** Indicate any potential schedule impacts.
- **Cost Impact:** Indicate any potential cost impacts.
- **Location, Cost Code, Reference, Private, Overdue Notifications:** Fill out as required for your project.

Step 7: Mark the RFI as private (optional)

Check the **Private** box if you want to restrict who can view the RFI. When marked as private, only users with admin permission on the RFI tool, the assignee, and users on the Distribution List can view it.

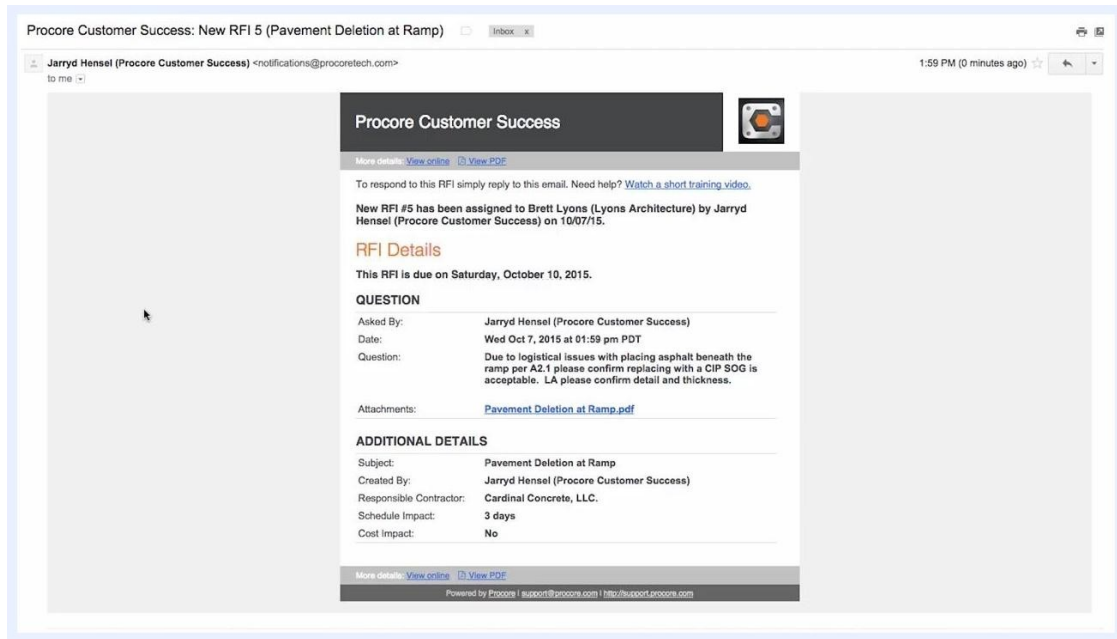
The screenshot shows the Procore RFI #5 Details screen. The 'Private' checkbox is highlighted with an orange arrow. The screen displays the following information:

- RFI #5 Details**
- General Information:**
 - Subject: Pavement Deletion at Ramp
 - Status: Open
 - Created By: Jarryd Hensel
 - Date Initiated: 10/07/15
 - Assignee: Lyons, Brett (Lyons Architecture)
 - Due Date: 10/10/15
 - Responsible Contractor: Cardinal Concrete, LLC
 - Question Received From: None
 - Distribution: (None)
 - Location: (None)
 - Drawing Number: 321214 - Asphalt Paving
 - Cost Code: (None)
 - Schedule Impact: 3 days
 - Reference: (None)
 - Cost Impact: No
 - Private: No
 - Ball In Court: Lyons, Brett (Lyons Architecture)
- QUESTION:**
 - Jarryd Hensel Sent Wed Oct 7, 2015 at 01:59 pm PDT
 - Due to logistical issues with placing asphalt beneath the ramp per A2.1 please confirm replacing with a CIP SOG is acceptable. LA please confirm detail and thickness.
 - %Pavement Deletion at Ramp.pdf
- RIGHT SIDEBAR:**
 - Email
 - Close RFI
 - Delete

New RFI creation screen with the "Private" checkbox highlighted by an orange arrow, showing all completed fields and the option to mark the RFI as private.

Step 8: Attach supporting files (optional)

Click **Attach File(s)** below the Question field. You can select files from your computer or choose from Procore's Photos, Documents, or Drawings tools. For example, you might attach "Pavement_Deletion_at_Ramp.pdf" from your Documents folder.



File selection dialog open for attaching a PDF to the RFI, showing the "Documents" folder with several PDF files available for selection.

Create the RFI

Step 9: Submit the RFI

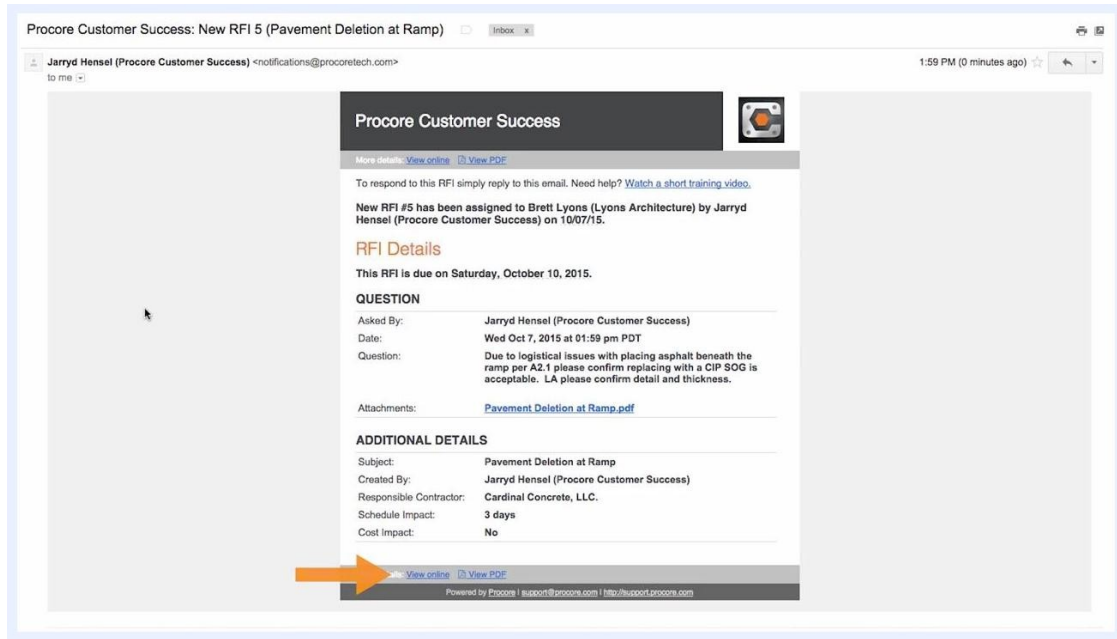
Click the **Create** button at the bottom right of the screen. Procore automatically sends an email notification to the assignee and all users on the Distribution List, informing them that an RFI has been created.

Step 10: Check the RFI notification email

The assignee and distribution list members receive an email with the RFI details, the question, and any attachments. The email includes:

- RFI number and subject
- Due date
- Question and attachments
- Additional details, such as who created it, the responsible contractor, and schedule or cost impact

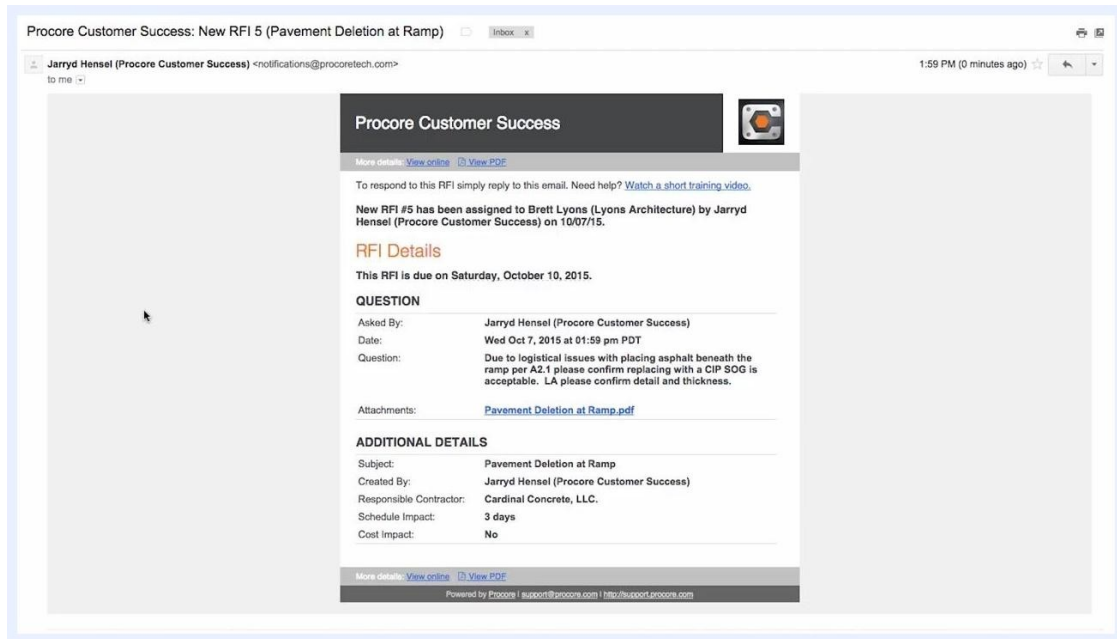
- Links to **View online** or **View PDF**



RFI notification email showing the RFI details, question, attachments, and the "View online" link highlighted by an orange arrow.

Step 11: Review the created RFI

After creating the RFI, open its details page to confirm all the information is correct. The page displays the status, subject, assignee, responsible contractor, schedule and cost impact, and the attached question and files.



RFI details page showing all entered information, including subject, assignee, responsible contractor, schedule impact, cost impact, and an attached PDF. The status shows "Open".

Respond to the RFI

Step 12: Choose how to respond to the RFI in Procore

There are three ways to respond to an RFI in Procore:

- **Online:** Click the **View online** link in the email to respond directly in Procore.
- **Mobile App:** Respond using Procore's iOS or Android mobile applications.
- **Email Reply:** Reply directly to the notification email with your answer. Procore automatically logs the response and any attachments.

Regardless of which method you use, Procore automatically logs all responses and attachments. Responding shifts the "Ball in Court" back to the RFI creator and notifies everyone on the distribution list by email.

Step 13: Review and close the RFI (admin only)

Users with admin permission can:

- Review all responses submitted to the RFI.
- Mark the official response by checking the **Official Response** box.
- Click **Close RFI** once the answer is satisfactory.

The screenshot displays the 'RFI #5 Details' page in the Procore system. The page is titled 'RFI #5 Details' and shows the following information:

- General Information:**
 - Subject: Pavement Deletion at Ramp
 - Status: Closed on 10/07/15
 - Created By: Jarryd Hensel
 - Date Initiated: 10/07/15
 - Assigned: Lyons, Brett (Lyons Architecture)
 - Due Date: 10/10/15
 - Responsible Contractor: Cardinal Concrete, LLC.
 - Question Received From: None
 - Distribution: (None)
 - Drawing Number: 321216 - Asphalt Paving
 - Cost Code: (None)
 - Schedule Impact: 3 days
 - Reference: (None)
 - Cost Impact: No
 - Private: No
 - Ball In Court: Hensel, Jarryd (Procore Customer Success)
- QUESTION:**
 - Jarryd Hensel Sent Wed Oct 7, 2015 at 01:59 pm PDT
 - Due to logistical issues with placing asphalt beneath the ramp per A2.1 please confirm replacing with a CIP SOG is acceptable. LA please confirm detail and thickness.
 - %Pavement Deletion at Ramp.pdf
- Official Response:**
 - Brett Lyons (Lyons Architecture) Responded Wed Oct 7, 2015 at 02:04 pm PDT LA takes no exception to replacing the asphalt with cast-in-place slab on grade. The details shall match the adjacent concrete slab on grade vehicle drive surface.

On the right side of the page, there are action buttons: 'Email', 'Reopen RFI', and 'Delete'. The 'Status' field indicates the RFI is 'Closed on 10/07/15'.

RFI details page showing the official response marked, with options to email, reopen, or delete the RFI. The status shows "Closed".

Step 14: Reassign the RFI (optional)

If needed, admins can reassign the RFI to a new person by clicking the **Edit** button on the RFI details page and changing the assignee.

What's next

By following these steps, your RFI is properly created, distributed, and managed within Procore, with all responses and actions accurately tracked and documented. Once an RFI is closed, you can continue monitoring the RFI tool for new items or reopen a closed RFI if further clarification is needed.