INTERFY

USER GUIDE: CREATING & PAYING A COMMITMENT PROGRESS CLAIM IN XERO

Instructions for how to create and pay a Procore commitment progress claim in Xero

Our integration partners

Document Control

Document Stage	APPROVED
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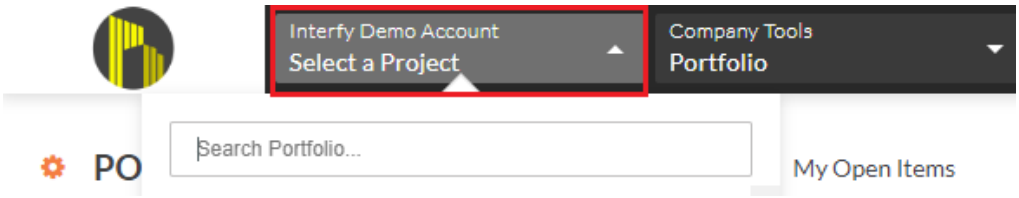
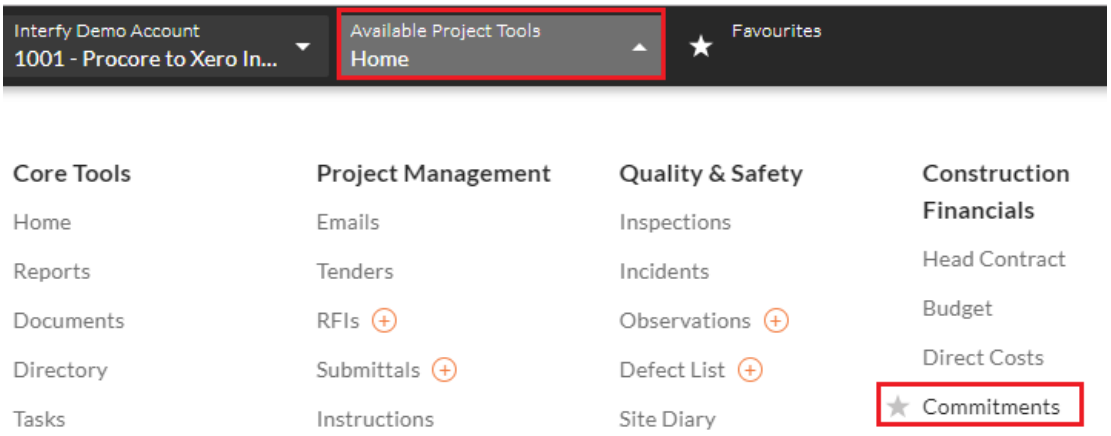
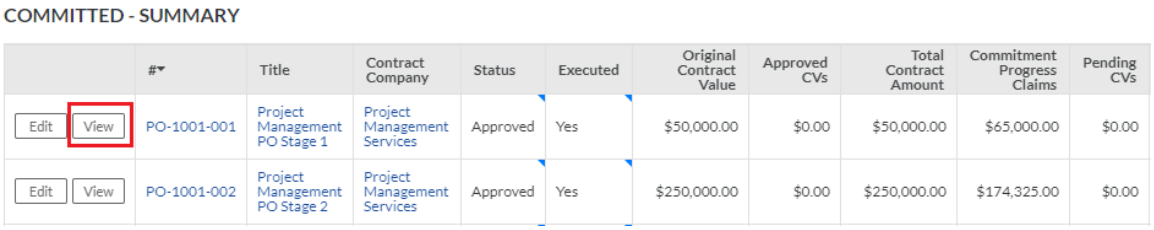
1. From Procore, select the project from the drop-down menu.



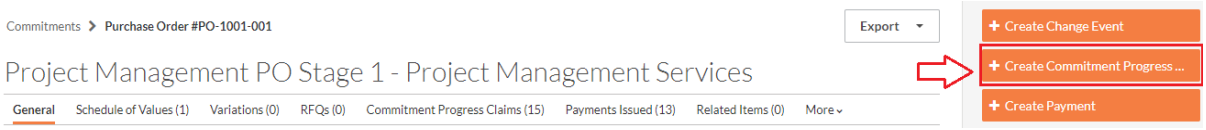
2. From Available Project Tools select **Commitments**.



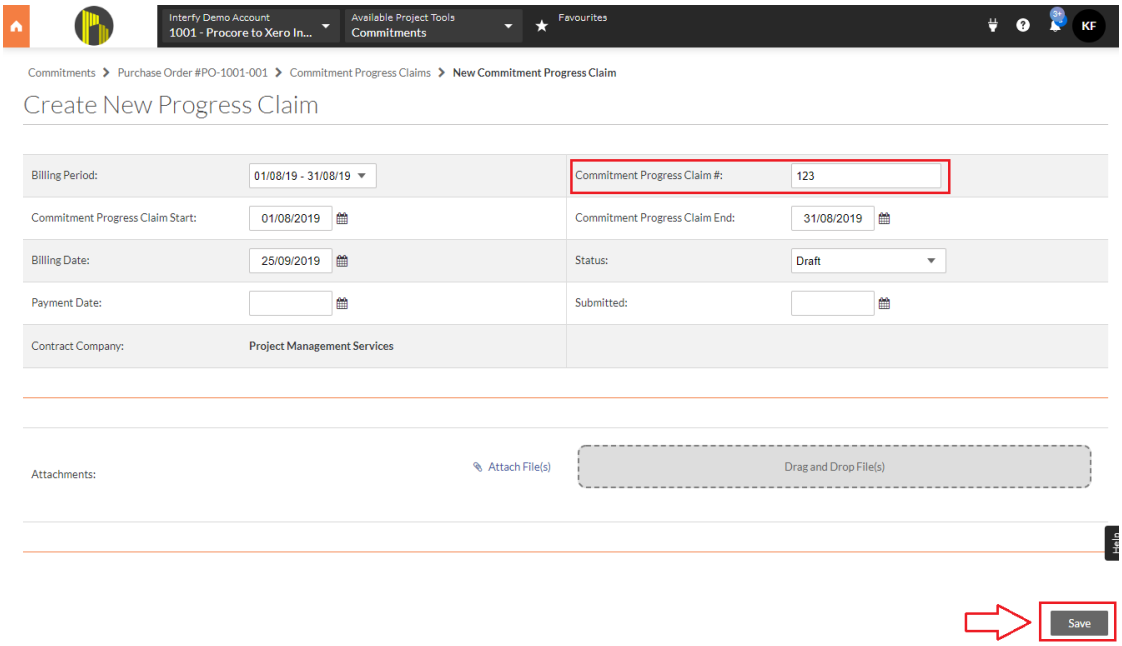
3. Click on **View** to open a purchase order or subcontract.



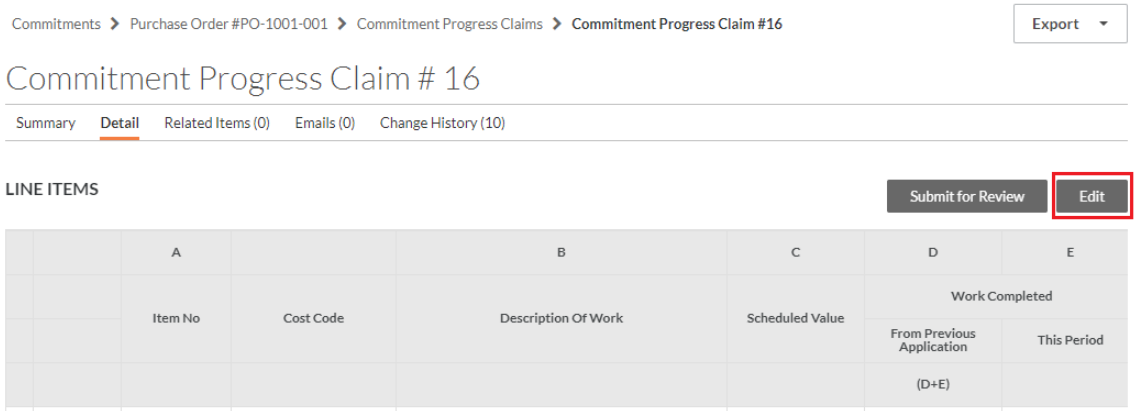
4. Click on **Create Commitment Progress Claim**.



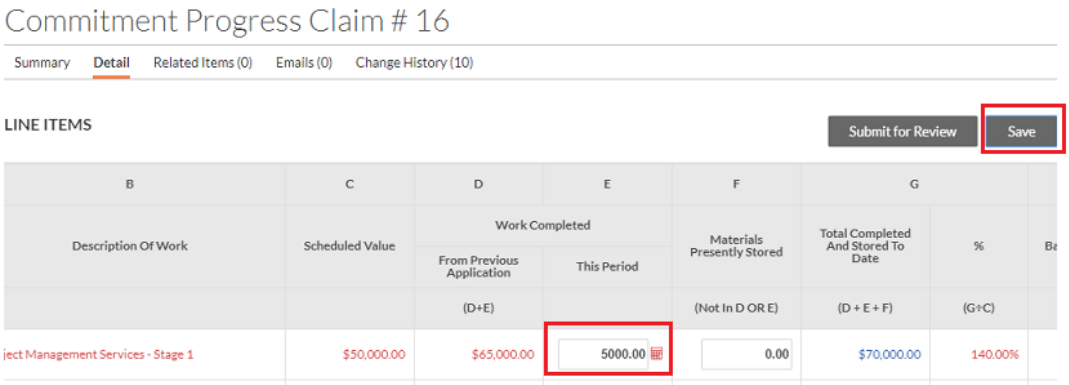
5. Enter the commitment progress claim # (invoice number) and click on **Save**.



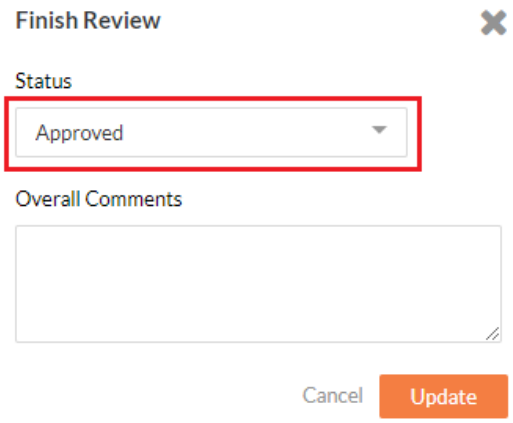
6. Click on **Edit.**



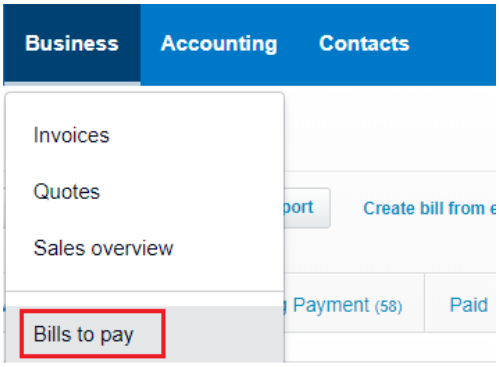
7. Enter a claim amount under ‘this period’ and click on **Save**.

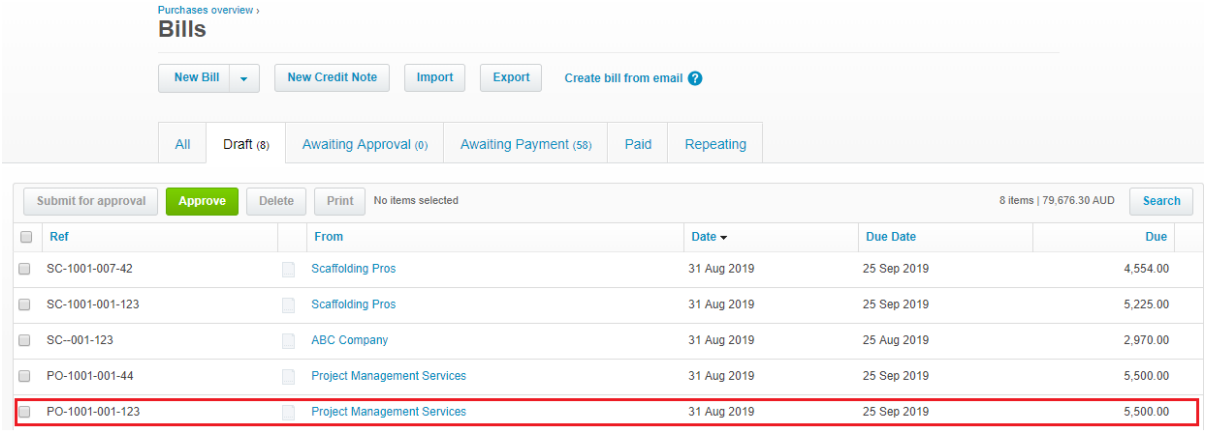


8. Change the status to **Approved** and click on update.



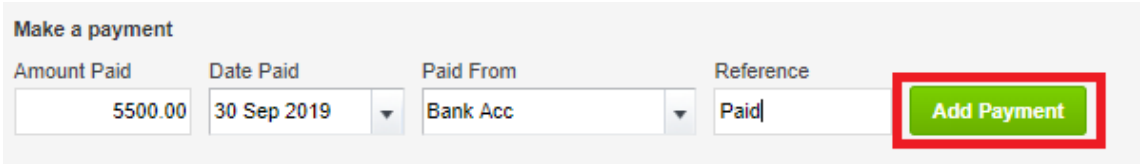
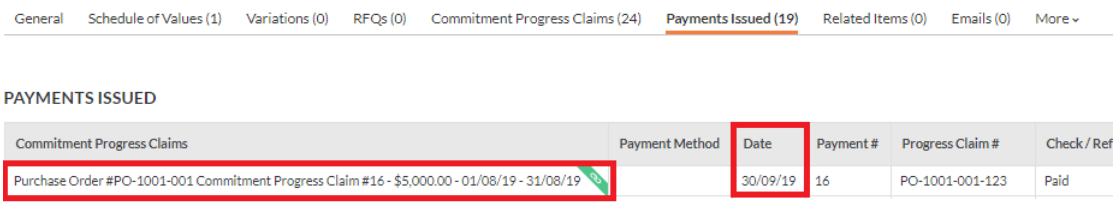
9. From Xero, go to **Business>Bills to Pay** to view bill under the drafts tab. The reference number should be the Procore commitment and claim number added to the end.





10. Click to open the invoice. Click on **Approve** to approve the invoice.

11. To pay the invoice, enter the date paid, account to pay from, and enter a reference. Click on **Add Payment**.



12. From Procore, go to **Payments Issued** to view the payment. The payment will show the date paid as well as a green sync banner to also show it is synced with Xero.