



INTERFY

## USER GUIDE: HOW TO MAP COST CODES TO XERO ACCOUNTS IN ONECORE XERO

- » Instructions for mapping Procore cost codes to Xero accounts in OneCore

Our integration partners



PROCORE





**Document Control**

Document Stage

**APPROVED**

Document Version

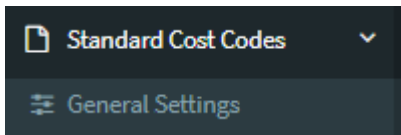
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Document Last Updated

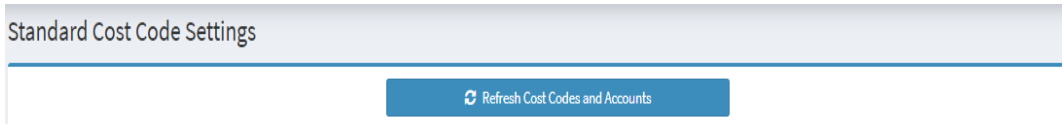
10 September 2019 by Karen Farrugia



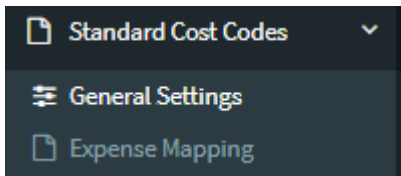
1. From OneCore, go to **Standard Cost Codes>General Settings**.



2. Select **Refresh Cost Codes and Accounts** to ensure you have an up to date list of cost codes and accounts.



3. For expense mapping, go to **Expense Mapping**.



4. You'll see two tabs - **Mapped Standard Cost Codes** and **Unmapped Standard Cost Codes**. Select **Unmapped Standard Cost Codes**. This shows the list of unmapped Procure cost codes.

Actions	Procure Cost Code	Procure Description	Standard Cost Code List
	01-002	Instructions	Standard Cost Code List
	02-000	General	Standard Cost Code List
	04-000	General	Standard Cost Code List
	05-000	General	Standard Cost Code List
	05-300-01	Tier Three	Standard Cost Code List

5. To manually map, click on the **pencil icon** next to a cost code to select the corresponding Xero account to map to. Click on **Save Changes** once done.

	01-002	Instructions	Standard Cost Code List
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Procure Standard Cost Code Mapping ×

Standard Cost Code

Name

Xero Account

- To auto-map cost codes to a corresponding Xero account, go to the **Mapped Standard Cost Codes** tab and click on **auto map by code** or **name**. This will only work if the corresponding Xero account has been created. Select **Yes** to map the codes.

Mapped Standard Cost Codes | Unmapped Standard Cost Codes

✓ Active - Procure Cost Code & Xero Account Mappings  
All mappings in this table are currently active.



### Auto Map by Code?

Are you sure you want to create mappings based on your Procure Standard Cost Code mappings?

- The auto-mapped cost codes will appear under the mapped cost codes tab. Any cost codes that can't be auto mapped will appear under the unmapped cost codes tab.
- For revenue mapping, go to **Revenue Mapping**.

Standard Cost Codes ▾

- General Settings
- Expense Mapping
- Revenue Mapping



9. Again, you'll see two tabs -Mapped Standard Cost Codes and Unmapped Standard Cost Codes. **Unmapped Standard Cost Codes** shows the list of unmapped Procore cost codes.

Mapped Standard Cost Codes    Unmapped Standard Cost Codes

**⚠ Inactive - Unmapped Procore Standard Cost Codes**  
Assign a Xero account to the Procore Cost code to activate.  
All project cost codes that are inherited from the standard cost code will automatically be mapped.

Show 50 entries

Actions	Procore Cost Code	Procore Description	Standard Cost Code List
	01	General Requirements	Standard Cost Code List
	01-000	Purpose	Standard Cost Code List
	01-002	Instructions	Standard Cost Code List

10. To manually map, click on the **pencil icon** next to a cost code to select the corresponding Xero revenue account to map to. Click on **Save Changes** once done.

Procore Standard Cost Code Mapping

Standard Cost Code: 01-002

Name: Instructions

Xero Account: - Select an Account -

Cancel    Save Changes

11. To auto-map all cost codes to one Xero revenue account, go to the **Mapped Standard Cost Codes** tab, select the Xero revenue account from Apply to All, and click on **Apply to All**. Select **Yes** to map the codes.

Apply to All: - Select a Xero Account -

Standard Cost Codes

- Select a Xero Account -
- 200 - SalesTest
- 260 - Other Revenue**
- 270 - Interest Income



Apply to All: 200 - SalesTest

Apply To All



### Apply to all?

Are you sure you want to apply the selected Xero Account to all cost codes for Head Contract Claims?

Yes, apply to all!

Cancel

12. The auto-mapped cost codes will appear under the mapped cost codes tab. Any cost codes that can't be auto mapped will appear under the unmapped cost codes tab.