



INTERFY

## Onboarding Requirements

- » Required Procore and MYOB user permissions for OneCore integration.

Pre onboarding and onboarding tasks to complete.



## DOCUMENT CONTROL

Document Stage  
RELEASE

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1.1

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01 June 2019

## REVISION HISTORY

Version	Description	Date
1.0	Initial Version	15/05/2019



1.1	Minor Update	01/06/2019
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## PRE-ONBOARDING TASKS

### PROCORE SYSTEM PERMISSIONS

Please create a new user in your Procore instance with the email address: [support@interfy.com.au](mailto:support@interfy.com.au)

Allow this user 'administrator' access at the company level, using the below screenshot as a guide. This will allow us to create the necessary service account with permissions and also assist us when we troubleshoot and provide support.

Name	None	Read Only	Standard	Admin
Programs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Portfolio	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Planroom	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Timecard	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Schedule	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Directory	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Reports	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Documents	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Inspections	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Admin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Although not required, to assist us in with troubleshooting please allow this user access to all existing projects and any newly created ones with admin permissions:

#### PROJECT SETTINGS

##### New Project Settings

(Interfy Dev is a Company Directory Admin and will have full administrative access to any projects to which they are added.) (Configure Templates)

- Add Interfy Dev to all new projects in Interfy Demo Account
- Allow Interfy Dev to create new projects (Interfy Dev will have full administrative access to any projects that they create)



## MYOB SYSTEM PERMISSIONS

### Before Proceeding

The OneCore MYOB integration for Procore requires the MYOB company file be stored online. You can determine if the file is online by checking for the “**Online**” indicator in bottom right hand corner once you load into MYOB.



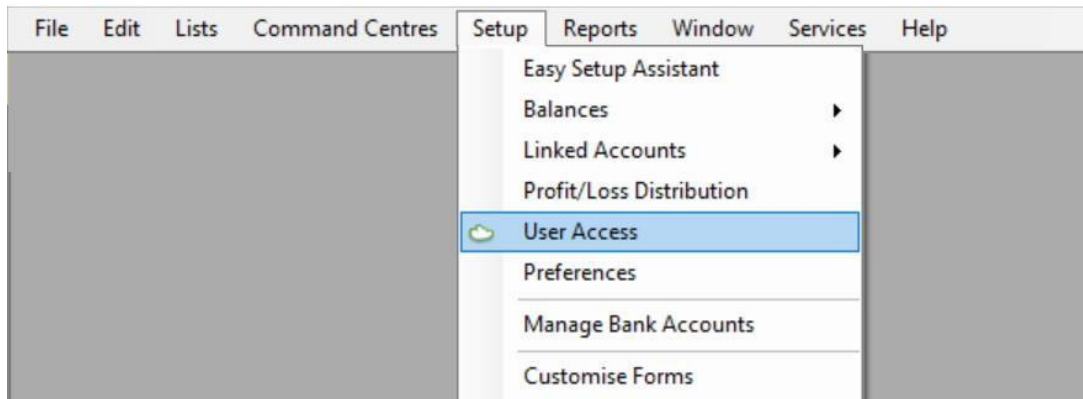
If your company file is not online, you can follow the instructions here:

<http://help.myob.com/wiki/display/ar/Put+your+company+file+online>

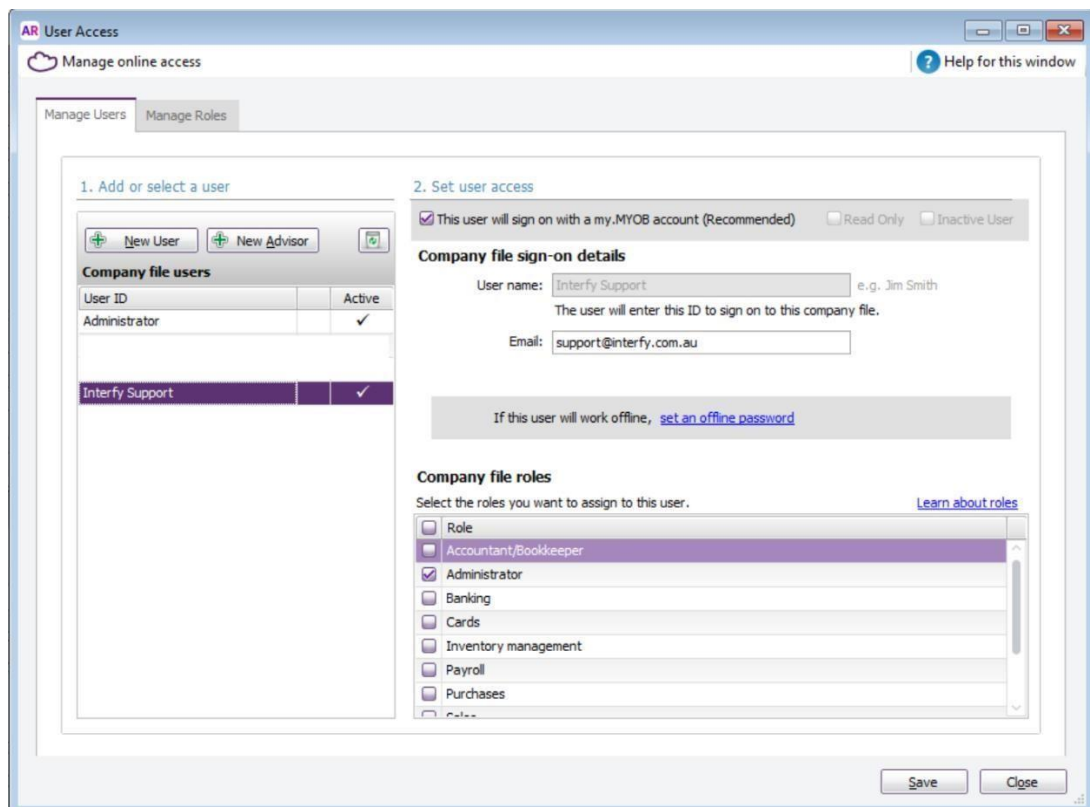
Please create a new user in your MYOB instance with the email address:

[support@interfy.com.au](mailto:support@interfy.com.au)

1. Open the company file.
2. Go to the Setup menu and choose User Access. The User Access window appears.



3. Click New User.



4. Select the **This user will sign on with a my.MYOB account** option.
5. Type **Interfy Support** in the User name field
6. Enter **support@interfy.com.au** in the Email field.
7. In the **Company file roles** list, select **Administrator**.
8. Click **Save and Invite User**

Full instructions are available here - <http://help.myob.com/wiki/display/ar/Add+a+user>

#### PROCORE COST CODES AND MYOB ACCOUNTS

Ensure that all Procure Standard Cost Codes have an equivalent MYOB Account that it can be mapped to. This is a key requirement in ensuring transactions can be processed between both systems without issue.



#### MERGE DUPLICATE PROCORE COMPANY VENDORS

Removing duplicate company vendors from Procore is a recommended task as this will eliminate confusion when mapping to MYOB contacts.

A step by step guide is provided in the following link.

<https://support.procore.com/products/online/user-guide/companylevel/directory/tutorials/merge-companies>

#### MERGE DUPLICATE MYOB CARDS

Removing duplicate Cards from MYOB is a recommended task as this will eliminate confusion when mapping to Procore company vendors.

A step by step guide is provided in the following link.

<http://help.myob.com/wiki/display/ar/Combining+cards>

#### CONTACT INTERFY SUPPORT

Once these tasks have been completed, contact us ([support@interfy.com.au](mailto:support@interfy.com.au)) to continue with getting the integration up and running.



PROCORE/MYOB INTEGRATION MAP

PROCORE			MYOB
<b>PROJECTS COST TYPES</b>			<b>JOBS LIST</b> Jobs List (Header) Jobs List (Sub-Job)
<b>COST CODES</b>			<b>ACCOUNT LIST</b>
<b>COMPANIES</b>			<b>CUSTOMERS SUPPLIERS</b>
<b>HEAD CONTRACT</b> Progress Claims			<b>SALES</b> Service Invoice
<b>HEAD CONTRACT</b> Payments Received			<b>SALES</b> Customer Payment
<b>COMMITMENTS</b> Progress Claims			<b>PURCHASES</b> Service Bill
<b>COMMITMENTS</b> Payments Issued			<b>PURCHASES</b> Supplier Payment
<b>DIRECT COSTS</b>			<b>PURCHASES</b> Service Bill





## ONBOARDING - COST CODE & VENDOR MAPPING

Once the pre-onboarding tasks have been completed, our support team will import data from both Procore and MYOB into our integration platform (OneCore) where data can be mapped across both systems.

A login to OneCore MYOB application will be created and supplied to begin the onboarding activities.

<https://onecore-myob.interfy.com.au>

## STANDARD COST CODE MAPPING

Standard cost codes must have an equivalent MYOB account. This will allow service invoice and services bill line items to be created and updated between both systems without issue.

Expense Mapping will be used when:

- A bill is created in MYOB from a Procore Commitment Progress Claim ○ Cost division mapping is only required if a Commitment SOV is created with unbudgeted line items
- A Direct Cost is created in Procore from a MYOB Service Bill ○ Only mapped cost codes can be used when creating a Direct Cost from MYOB

Note: A default MYOB account can be selected for unbudgeted line items in a Commitment SOV that do not contain a cost code.

Revenue Mapping will be used when:

- A service invoice is created in MYOB from a Procore Head Contract Progress Claim

Note: Procore Head Contract SOV line items can be created with a cost code, cost division or without a cost code.

Create a Mapping:

1. Navigate to the Standard Cost Code -> Expense Mapping / Revenue Mapping
2. Click on the 'Unmapped Procore Standard Cost Code' tab
3. Edit an unmapped cost code and select the equivalent MYOB account via the dropdown. 4. Click 'Save'

Once all Standard Cost codes have been mapped, any existing or new Procore project that uses this standard cost code set will automatically receive the mappings.



## VENDOR MAPPING

Procore vendors must have an equivalent MYOB card. This will allow invoices to be created and updated between both systems without issue.

A mapping wizard is provided to assist with the process of mapping Procore vendors and MYOB cards by identifying any suggested mappings. The suggestions are based on the Levenshtein distance algorithm to determine how similar a Procore vendor and MYOB card names are.

Vendor Mapping Wizard

**Vendor Mapping Wizard**  
To assist in mapping Procore vendors and Xero contacts, all Procore vendors have been compared against Xero contacts and given a match score. This score is based on the Levenshtein distance algorithm and measures the difference between the sequence of characters of 2 inputs.

Adelaide Brick Layers Pty Ltd

View Xero Contact

Adelaide Brick Layers

Score 72% Map

Skip

Status

Total Vendors	31
Total Mapped	21
Total Skipped	8
Total Tasks Remaining	5

Map - If the vendor / contact presented by the wizard look like a match, press the 'Map' button

Skip - If the vendor / contact presented by the wizard do not match, press the 'Skip' button

Once these tasks have been completed, contact us ([support@interfy.com.au](mailto:support@interfy.com.au)), and we can export:

- All unmapped MYOB cards into Procore; or
- A selected list of MYOB cards into Procore (please let us know)

## FINAL STEPS

Once all onboarding activities are completed, we will confirm with you which Procore Projects are to be integrated with MYOB and activate.

After activation:

- All new projects created in Procore will automatically be integrated. This includes:
  - Project level cost codes that have been created from the standard cost code list will automatically be mapped to a MYOB account.
  - A MYOB header job will be created.



- A MYOB sub job for each Procore cost type under the header job. ○ A MYOB sub job to record revenue.
- New MYOB cards will be created in Procore. New Procore vendors will not create a new MYOB card.

Contact us ([support@interfy.com.au](mailto:support@interfy.com.au)) for any questions, feedback and support.