



INTERFY



## Onboarding Requirements

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

Pre onboarding and onboarding tasks to complete.



## DOCUMENT CONTROL

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## REVISION HISTORY

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1.0	Initial Version	02/10/2018
1.1	Minor Update	13/10/2018
1.2	Document Template Update	29/10/2018
2.0	Major Update	20/02/2019

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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 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)

### XERO SYSTEM PERMISSIONS

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

Allow 'Standard' permissions:



**Business and accounting**

How much access do they need?

Invoice only  **Standard**  Adviser  Read only

**i** This role suits business owners and admin staff that manage the day-to-day business and accounting. [Understand user role details](#)

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Sales and purchases

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Bank accounts and balances:

- Reconcile and edit statement lines (non-cash coding)
- Bulk reconciliation and statement line editing (cash coding)

Bank account admin  Can add and edit bank account details held for customers and suppliers

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Reports  View and rerun reports

Publish reports

Set lock dates

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Edit settings

Manage users  Can invite new users, edit user roles, and delete users

## PROCORE COST CODES AND XERO ACCOUNTS

Ensure that all Procore Standard Cost Codes have an equivalent Xero 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 Xero 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 XERO CONTACTS

Removing duplicate contacts from Xero 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.

<https://central.xero.com/s/article/Merge-contacts>

## XERO TRACKING CATEGORIES

Our integration requires the use of both the tracking categories available. Tracking categories allow an invoice's line item to hold additional information and appears as an extra line item:

From	Date	Due Date	Reference						Total
Spotless Cleaning	1 Dec 2018	23 Dec 2018	SC-1004-001-5						1,100.00
No address									
<a href="#">Add address</a>									
Item Code	Description	Quantity	Unit Price	Account	Tax Rate	Project	Cost Types	Amount AUD	
	Man hours for cleaning - Retention Released	1.00	1,000.00	Liability - Corporate Headquarters	GST on Expenses	CHQ1004	Labor	1,000.00	
Subtotal								1,000.00	
Total GST 10%								100.00	
<b>TOTAL</b>								<b>1,100.00</b>	



This allows us to map:

- Projects
- Cost Types

If a project or job tracking category already exists, we can simply integrate to this.

If the second tracking category is in use for another purpose, it will need to be archived. The cost type tracking category is required to integrate to Procore's Direct Cost tool.

#### 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/XERO INTEGRATION MAP



PROCORE		XERO
<b>ONBOARDING – MAPPED IN ONECORE</b>		
<b>PROJECTS / SUB JOBS COST TYPES</b>		<b>TRACKING CATEGORIES</b> Projects Cost Types
<b>STANDARD COST CODES</b>		<b>ACCOUNT CODES</b>
<b>COMPANIES</b>		<b>CONTACTS</b>
<b>LIVE SYNC</b>		
<b>PROJECTS</b> New Projects		<b>TRACKING CATEGORY</b> Project Tracking Option
<b>COMPANIES</b> New Companies		<b>CONTACTS</b> New and Updated Contacts
<b>HEAD CONTRACT</b> Progress Claims with Sub Jobs		<b>SALES</b> Sales (Invoiced)
<b>HEAD CONTRACT</b> Payments Received		<b>SALES</b> Invoice Payments
<b>COMMITMENTS</b> Progress Claims with Sub Jobs		<b>BILLS</b> Commitment Costs (Invoiced)
<b>COMMITMENTS</b> Payments Issued		<b>BILLS</b> Commitment Invoice Payments
<b>DIRECT COSTS</b>		<b>BILLS</b> Multi Project Line Items
<b>SCHEDULED SYNC</b>		
<b>DIRECT COSTS</b>		<b>SPEND MONEY</b> <b>CREDIT NOTES</b> <b>MANUAL JOURNALS</b> Multi Project Line Items





## ONBOARDING - COST CODE & VENDOR MAPPING

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

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

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

## STANDARD COST CODE MAPPING

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

Expense Mapping will be used when:

- A bill is created in Xero from a Procore Commitment Progress Claim
- A Direct Cost is created in Procore from a bill in Xero

Note: Only cost codes can be mapped.

Revenue Mapping will be used when:

- A sales invoice is created in Xero from a Procore Head Contract Progress Claim

Note: Both cost codes and cost divisions can be mapped.

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 Xero account via the dropdown. 4. Click 'Save'

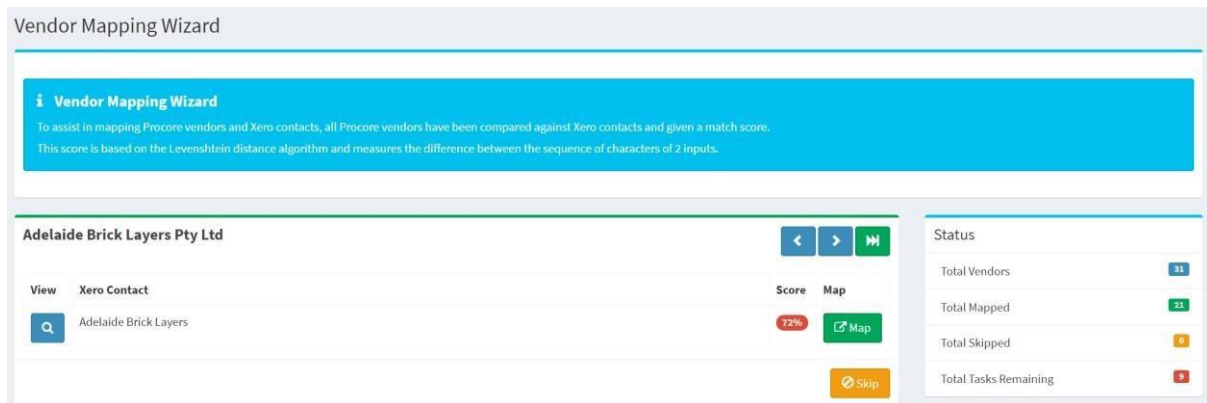
Once all Standard Cost codes have been mapped, any existing or new Procore project that uses this standard cost code set will automatically receive the mappings.



## VENDOR MAPPING

Procore vendors must have an equivalent Xero contact. 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 Xero contacts by identifying any suggested mappings. The suggestions are based on the Levenshtein distance algorithm to determine how similar a Procore vendor and Xero contact names are.



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 will export:

- Unmapped Procore Vendors into Xero
- Unmapped Xero Contacts into Procore

## FINAL STEPS

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

After activation:

- All new projects created in Procore will automatically be integrated.
- Procore vendor / Xero contact names will be in sync.

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