



# ONBOARDING CHECKLIST

\*\*\* Please refer to the onboarding document for full details of listed tasks \*\*\*

## PRE-ONBOARDING TASKS

<b>Procore Access</b>	Grant directory admin access to support@interfy.com.au	<input type="checkbox"/>
<b>MYOB Access</b>	Grant Admin access to support@interfy.com.au	<input type="checkbox"/>
<b>Duplicate Procore Vendors</b>	Merge duplicate Procore vendors. See onboarding document for instructions.	<input type="checkbox"/>
<b>Duplicate MYOB Contacts</b>	Merge duplicate MYOB supplier cards and customer cards. See onboarding document for instructions.	<input type="checkbox"/>
<b>MYOB Accounts</b>	For every Procore Standard Cost Code, ensure there is a MYOB account is available to map to.	<input type="checkbox"/>
<b>Payment</b>	Make payment to interfy and send remittance to accounts@interfy.com.au	<input type="checkbox"/>
<b>Advise Interfy</b>	Email support@interfy.com.au to advise you have completed the above pre-onboarding tasks & provide details of the One Core Account users ie First Name, Last Name and email address/es.	<input type="checkbox"/>

## ONECORE ACCOUNT PROVISIONING

Our team will create your OneCore Account, pull in your data from Procore and MYOB and send you a pre-onboarding summary.

Your OneCore account login/s will be issued to you so you can complete the onboarding tasks below.

## ONBOARDING TASKS

<b>Standard Cost Code Mapping</b>	Map all standard cost codes to a MYOB account.	<input type="checkbox"/>
<b>Vendor Mapping</b>	Map all Procore vendors to MYOB cards. An export of all MYOB cards to Procore may be requested.	<input type="checkbox"/>
<b>Invoice Settings</b>	Configure invoice settings such payment terms.	<input type="checkbox"/>
<b>Retention Settings</b>	Configure liability / asset accounts for retention.	<input type="checkbox"/>
<b>Project Mapping</b>	Identify which Procore projects are enabled for mapping.	<input type="checkbox"/>
<b>Review Interfy Help</b>	Review the Interfy help site to familiarise yourself with our integration. <a href="http://help.interfy.com.au">http://help.interfy.com.au</a>	<input type="checkbox"/>
<b>Advise Interfy</b>	Email support@interfy.com.au to advise you have completed the Onboarding Tasks above and are ready to go live.	<input type="checkbox"/>

## FINAL REVIEW & LIVE ACTIVATION

Our team will perform a final review. They will be in touch with any items outstanding or to advise you have been activated.

INTERFY ONBOARDING CHECKLIST v1.3  
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