



INTERFY



## USER GUIDE: MAPPING TO AN EXISTING PROJECT IN ONECORE

» Instructions for mapping to an existing project in OneCore

Our integration partners



PROCORE





**Document Control**

Document Stage

**APPROVED**

Document Version

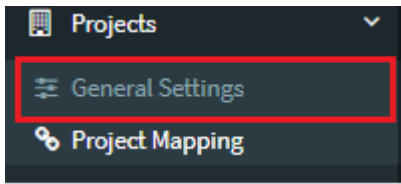
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Document Last Updated

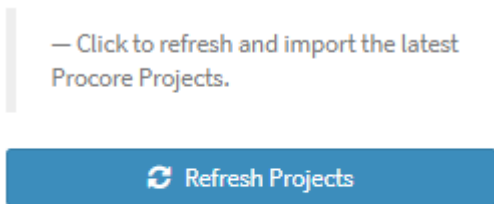
10 September 2019 by Karen Farrugia



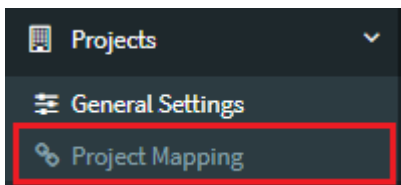
1. To map to an existing project from OneCore, go to **Projects>General Settings**:



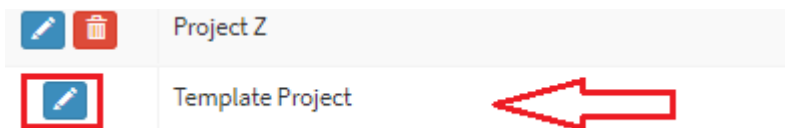
2. Click on **Refresh Projects** to refresh the projects list.



3. Go to **Projects>Project Mapping**.



4. Click on the pencil icon next to the project you want to map.



5. Select the tracking option from the list (if it's not available it needs to be created in Xero or it's been mapped to another project). Click on **Save Changes**.



### Edit Project Tracking Option ×

Name

Project Number

Tracking Option

Activated  No

6. Once the mapping has been saved, a green activate button will appear. Click on **Activate** to create a link between the project and tracking option.

### Edit Project Tracking Option ×



Name

Project Number

**NOTE - Changing the Tracking Option will update the linked tracking option name within Xero.**

Tracking Option \*

Activated  No

Actions	Name	Project Number	Tracking Option	Activated
 	Template Project	1002	TP	Yes