



INTERFY



ONECORE MYOB FEATURE GUIDE

» General feature guide for OneCore MYOB

Our integration partners



PROCORE





Document Control

Document Stage

APPROVED

Document Version

1.1

Document Last Updated

10 September 2019 by Karen Farrugia



Contents

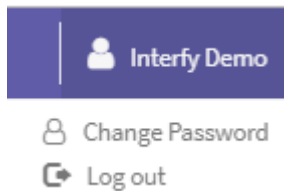
<i>Dashboard:</i>	5
Invoices:	6
Retention:	7
Standard Cost Codes:	8
Project Cost Codes:	10
Sub Jobs:	12
Vendor Mapping:.....	12
Projects / Jobs:.....	14



Top Header Bar:



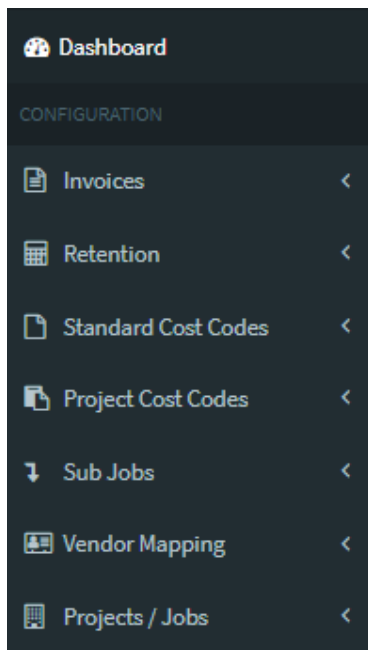
The top header bar shows the logged in user from the top-right corner. When clicking on the logged in user you have the option to Change Password or Logout:



The menu button allows you to minimize and maximize the left-pane menu:



Left Pane Menu:



The left pane menu allows you to view and set up your company's integration settings between Procore and MYOB. The menu options include:



- Dashboard
- Invoices
- Retention
- Standard Cost Codes
- Project Cost Codes
- Sub Jobs
- Vendor Mapping
- Projects / Jobs

Dashboard:

The dashboard interface is divided into several sections:

- MYOB Sync:** A green box indicating the last sync time as 23/10/2018 - 14:18 PM.
- Mapping Errors:** A purple box with a '0' indicating no errors, with a 'More info' link.
- Vendor:** A pink box with a '0' indicating no vendors, with a 'More info' link.
- Successful Transactions:** A large white area with a date filter for 'October 25, 2019 - October 25, 2019'.
- Timeline:** A vertical timeline on the right showing updates: '15 Apr. 2019 MYOB Beta' and '06 Mar. 2019 Dashboard Enhancement'.
- Failed Transactions:** A row of six colored boxes representing different transaction types: Head Contract Claim (green), Commitment Claim (orange), Direct Cost (red), Project (blue), Vendor (light blue), and Contact (dark orange). Each box shows a '0' and a 'More info' link.

The dashboard allows you to view any mapping errors as well as failed transactions, if the transaction isn't going through.

You can filter by the date range:



October 9, 2019 - October 9, 2019 ▼

Today

Yesterday

Last 7 Days

Last 30 Days

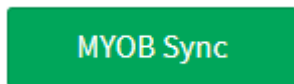
This Month

Last Month

Custom Range

Apply Cancel

MYOB Sync -



The MYOB Sync is scheduled to run every hour to check if there are any updates from MYOB and push them across to Procore. The MYOB Sync button can also be pushed to force the sync immediately.

Invoices:

Invoice Settings

Select the Myob invoice date for Head Contract and Commitment progress claims.

Invoice Date Type

Commitments Payment Terms
Select the default Myob payment terms to be used for commitment progress claims.

Balance Due Date

- For Cash on Delivery, Pre paid, In a given number of days or Number of days after EOM, enter the number of days withing which payments must be made.
- For On a day of the month or Day of month after EOM, enter the day of the month within which the payment must be made.

Expense Payment Terms

Balance Due Date

Invoices has two options: General Settings and Category Mapping.



General Settings allows you to set the MYOB invoice date for commitment and head contract claims. It also allows you to set the expense payment terms and balance due date for commitment claims, as well as the revenue payment terms and balance due date for head contract claims.

Category Mapping allows you to enable Procore claim status/MYOB category mapping to represent a claim's approval status in MYOB.

Retention:

Retention has three options: General Settings, Project Expense Retention, Project Revenue Retention.

General Settings allows you to select your default retention expense and revenue accounts, if you use it, as well as setting the default retention type.



Project Expense Retention allows you to map a default MYOB retention account for each project for expenses i.e. commitment claims or direct costs.

Project Retention - Expense			
Show	25	▼	entries
Actions	Name	Myob Account Code	Myob Account Name
	Block15		
	Great Notion		
	H2 Head Office	2-1110	Visa #1
	Procure to MYOB Integration	2-9900	PTMI Liability
	Upright		

Project Revenue Retention allows you to map a default MYOB retention account for each project for revenue i.e. head contract claims.

Project Retention - Revenue			
Show	25	▼	entries
Actions	Name	Myob Account Code	Myob Account Name
	Block15		
	Great Notion		
	H2 Head Office	3-8000	Retained Earnings
	Procure to MYOB Integration	1-1360	Voluntary Withholding Credits
	Upright		

Standard Cost Codes:

Standard Cost Code Settings	
Refresh Cost Codes and Accounts	
Default Accounts	
Default Standard Cost Code Accounts - Within Procure, a Commitment/Head Contract can be created with a SOV containing line items without cost codes (unbudgeted line items). Select a default MYOB Account to be used in these scenarios.	
Expense Account	<input type="text" value="- Select an Account -"/>
Revenue Account	<input type="text" value="- Select an Account -"/>
Save Changes	



Standard Cost Codes has four options: General Settings, Expense Mapping, Revenue Mapping, Expense Cost Division.

General Settings allows you to update the Procore cost code and MYOB account lists in OneCore, as well as set a default expense and revenue account for unbudgeted line items for commitments and head contracts within Procore.

Expense Mapping allows you to auto-map Procore cost codes to MYOB expense accounts by code or name, or manually map them from unmapped cost codes.

Standard Cost Code Mapping - Expense

Mapped Standard Cost Codes Unmapped Standard Cost Codes

✓ **Active - Procore Cost Code & Myob Account Mappings**
All mappings in this table are currently active.

Auto Map by Code Auto Map by Name

Show 50 entries Search:

Actions	Cost Code	Description	Type	Standard Cost Code List	Myob Account	Myob Name
	01-010	Project Management	Cost Code	Standard Cost Code List	6-9110	Project Management
	01-542	Scaffolding and Platforms	Cost Code	Standard Cost Code List	6-3502	Scaffolding and Platforms

Revenue Mapping allows you to auto-map Procore cost codes to a MYOB revenue account. Or manually map them from unmapped cost codes.

Standard Cost Code Mapping - Revenue

Apply All - Apply a Myob revenue account for all cost codes when performing a head contract claim.

Apply to All:

Mapped Standard Cost Codes Unmapped Standard Cost Codes

✓ **Active - Procore Cost Code & Myob Account Mappings for Head Contract Progress Claims**
All mappings in this table are currently active.

Show 50 entries Search:

Actions	Cost Code	Description	Standard Cost Code List	Myob Account	Myob Name
	01	General	Cost Division	Standard Cost Code List	4-2000

Expense Cost Division allows you to manually map Procore cost divisions to MYOB accounts. It also includes a warning that mapping to cost divisions will not work for direct costs.



Standard Cost Division Mapping - Expense

i THIS IS AN OPTIONAL MAPPING

This is an optional mapping and will only be required if there are unbudgeted commitments created with an SOV containing cost divisions.
Assign a Myob account to the Procure Cost division to activate.
Cost division mappings **WILL NOT** work with Procure's Direct Cost tool.

NOTE

Accounts that only map to a Cost Division **WILL NOT** work with Procure's Direct Cost tool

Mapped Standard Cost Divisions

Unmapped Standard Cost Divisions

✓ Active - Cost Divisions & Myob Account Mappings

All mappings in this table are currently active.

Show entries

Search:

Project Cost Codes:

Project Cost Code Mapping - Expense

Select the project to view it's cost code mappings.

Project:

Mapped Cost Codes

Unmapped Cost Codes

Unmapped Cost Divisions

✓ Active - Procure Cost Code & Myob Account Mappings

All mappings in this table are currently active.

[Auto Map From Standard Cost Codes Mappings](#)

Project Cost Codes has four options: Expense Mapping, Revenue Mapping, Default Expense Accounts, Default Revenue Accounts.

Expense Mapping allows you to auto-map Procure project cost codes to MYOB expense accounts from the standard cost codes list, or manually map them from unmapped cost codes. If the project does not have standard cost codes, they will have to be manually mapped here.

Revenue Mapping you to auto-map Procure project cost codes to a MYOB revenue account. Or manually map them from unmapped cost codes.



Project Cost Code Mapping - Revenue

Select the project to view it's cost code mappings.

Project:

Apply All - Apply a Myob revenue account for all project cost codes when performing a head contract claim.

Apply to All:

[Apply To Selected Project](#)

Default Expense Accounts allows you to set a default MYOB expense account for each project, which takes precedence over the default account defined for standard cost codes.

Default Project Expense Account

NOTE
Default project expense accounts will take precedence over the default account defined for standard cost codes.

Show entries Search:

Actions	Name	Project Number	Expense Account Code	Expense Account Name
✎	Block15	7102019H		
✎	Great Notion	72419H	6-9156	Temp Barriers
✎	H2 Head Office	H2888H	6-1400	Borrowing Expenses
✎	Procure to MYOB Integration	PTMI001		
✎	Upright	711191H		

Showing 1 to 5 of 5 entries [Previous](#) [1](#) [Next](#)

Default Revenue Accounts allows you to set a default MYOB revenue account for each project, which takes precedence over the default account defined for standard cost codes.

Default Project Revenue Accounts

NOTE
Default project revenue accounts will take precedence over the default account defined for standard cost codes.

Show entries Search:

Actions	Name	Project Number	Revenue Account Code	Revenue Account Name
✎	Block15	7102019H		
✎	Great Notion	72419H		
✎	H2 Head Office	H2888H	8-2000	Other Income
✎	Procure to MYOB Integration	PTMI001		
✎	Upright	711191H		

Showing 1 to 5 of 5 entries [Previous](#) [1](#) [Next](#)



Sub Jobs:

Sub Job Cost Code Mapping - Expense

Select the sub job to view it's cost code mappings.

Sub Job:

Mapped Cost Codes Unmapped Cost Codes Unmapped Cost Divisions

✓ **Active - Procore Cost Code & MYOB Account Mappings**
All mappings in this table are currently active.

Sub Jobs has two options: Expense Mapping and Revenue Mapping.

Expense Mapping allows you to auto-map Procore sub job cost codes to MYOB expense accounts from the standard cost codes list, or manually map unmapped cost codes and divisions.

Revenue Mapping allows you to auto-map Procore sub cost codes to a MYOB revenue account, or manually map them from unmapped cost codes.

Sub Job Cost Code Mapping - Revenue

Select the sub job to view it's cost code mappings.

Sub Job:

Apply All - Apply a Myob revenue account for all sub job cost codes when performing a head contract claim.

Apply to All:

Vendor Mapping:

Vendor Settings

Vendor Mapping has three options: General Settings, Mapping Wizard and Vendor Mapping.



General Settings allows you to update the Procore vendor and MYOB contact lists in OneCore.

Mapping Wizard assists you in mapping Procore vendors to MYOB contacts using a matching algorithm and provides a score.

Vendor Mapping Wizard

i 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.

🟢 All vendor matching activities completed.
Please complete the vendor mapping by manually mapping the remaining or contact support to export Procore vendors to Xero and Xero contacts to Procore.

Adelaide Brick Layers Pty Ltd < >

⚠️ The mapping suggestion has been skipped.

View	Xero Contact	Score
<input type="checkbox"/>	Adelaide Brick Layers	72%

Status

Total Vendors	59
Total Mapped	59
Total Skipped	1
Total Tasks Remaining	0

Vendor Mapping allows you to auto-map Procore vendors to MYOB contacts by name or ABN, or manually map them from unmapped vendors and contacts. It also allows you to export unmapped vendors and contacts to MYOB or Procore.

Vendor Mapping Lists

Mapped Vendors | Unmapped Procore Vendors | Unmapped Myob Contacts

✔ Active Procore Vendor - Myob Contact Mappings
All mappings in this table are currently active.

[Auto Map Vendors by Name](#) [Auto Map Vendors by ABN](#)

Show entries Search:

Actions	Procore Vendor	Procore Vendor Id	MYOB Contact	MYOB Contact Id	Contact Type
	A1 Electric	14096512	A1 Electric	aa0d98d0-c50a-4e87-a7f6-2ef03073bb21	Supplier



Projects / Jobs:

Project Settings

Refresh Projects

Project Settings

Select the Procore Project Stage for automating the project mapping. By default, projects are mapped on creation.

Project Stage: - Select a Project Stage -

Save Settings

Projects/Jobs has two options: General Settings and Project Mapping.

General Settings allows you to refresh the projects lists for Procore and MYOB.

Project Mapping allows you to map a Procore project to a MYOB job through header job or detailed job integration.

For header job integration, a Procore project is represented in MYOB as a header job and a series of detailed jobs to represent income and cost types. Advantage of this is that you're able to track cost types. Disadvantages are, for every project, several detailed jobs will need to be created and sit underneath the header job. When creating direct costs from MYOB, selecting the right job to represent a cost type may become confusing.

For detailed job integration, a Procore project is represented in MYOB as a detailed job. This does not have the ability to track cost types. Advantage of this is that the jobs list remains clean and direct costs from MYOB are easier to manage. Disadvantage is that because a cost type can't be selected when creating a direct cost from MYOB, we need you to specify a default cost type for all direct costs that come through from MYOB.

Speak with interfy support to change your default job integration type.

Procore Projects / MYOB Header Jobs

Header Job Integration

Header job integration mode allows a Procore project to integrate to MYOB through header jobs. Within the header job, a detailed job will be created for all Procore cost types. This allows cost types to be selected for direct costs created in MYOB and sent to Procore. If cost type tracking within MYOB is not required, please contact interfy support to switch to Detailed Job Integration.

Actions	Name	Project Number	Header Job Name	Header Job Number
	Block15	7102019H	Block15	7102019H
	Great Notion	72419H	Great Notion	72419H
	H2 Head Office	H2888H	H2 Head Office	H2888H
	Procore to MYOB Integration	PTMI001	Procore to MYOB	PTMI001H