



ONBOARDING CHECKLIST

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

PRE-ONBOARDING TASKS

Procore Access	Grant directory admin access to support@interfy.com.au	<input type="checkbox"/>
Xero Access	Grant Standard User access to support@interfy.com.au	<input type="checkbox"/>
Duplicate Procore Vendors	Merge duplicate Procore vendors. See onboarding document for instructions.	<input type="checkbox"/>
Duplicate Xero Contacts	Merge duplicate Xero Contacts. See onboarding document for instructions.	<input type="checkbox"/>
Xero Accounts	For every Procore Standard Cost Code, ensure there is a Xero account is available to map to.	<input type="checkbox"/>
Xero Tracking Categories	Ensure both Xero tracking categories are available.	<input type="checkbox"/>
Payment	Make payment to interfy and send remittance to accounts@interfy.com.au	<input type="checkbox"/>
Advise Interfy	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 Xero 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

Standard Cost Code Mapping	Map all standard cost codes to a Xero account.	<input type="checkbox"/>
Vendor Mapping	Map all Procore vendors to Xero contacts. An export of all Xero contacts to Procore may be requested.	<input type="checkbox"/>
Invoice Settings	Configure invoice settings such payment terms, initial Xero invoice / bill status.	<input type="checkbox"/>
Retention Settings	Configure liability / asset accounts for retention.	<input type="checkbox"/>
Project Mapping	Identify which Procore projects are enabled for mapping.	<input type="checkbox"/>
Review Interfy Help	Review the Interfy help site to familiarise yourself with our integration. https://help.interfy.com.au	<input type="checkbox"/>
Advise Interfy	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.