



INTERFY

Onboarding Requirements

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

Pre onboarding and onboarding tasks to complete.



DOCUMENT CONTROL

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PRE-ONBOARDING TASKS

PROCORE SYSTEM PERMISSIONS

Please create a new User in your Procore instance **named Interfy Support (First Name Interfy, Last name Support)** with the email address: 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.

COMPANY PERMISSIONS TEMPLATES: Do Not Apply A Permission Template

Name	None	Read Only	Standard	Admin
Project groups	<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"/>
Program	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Directory	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" 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"/>
Workflows	<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"/>
Permissions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Timesheets	<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)

QBO SYSTEM PERMISSIONS

Please create a new User in your QBO instance **named Interfy Support (First Name Interfy, Last name Support)** with the email address: support@interfy.com.au

Allow 'Standard all access' permissions:



Add a new user

Personal info

We'll send them an invite to join your company with their Intuit Account.

First name	Last name	Email
<input type="text" value="Interfy"/>	<input type="text" value="Support"/>	<input type="text" value="support@interfy.com.au"/>

Roles

Control permissions for your new user by assigning a system role. [View role descriptions](#)

Standard all access | Users added to this role get full access without admin privileges, plus access to Payroll.

PROCORE COST CODES AND QBO ACCOUNTS

Ensure that all Procore Standard Cost Codes have a QBO 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 QBO 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 QBO CONTACTS

Removing duplicate contacts from QBO 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://quickbooks.intuit.com/learn-support/en-au/help-article/manage-customers/merge-duplicate-accounts-customers-suppliers/L5AOyW9kw_AU_en_AU



PAYMENTS

Please send remittance to accounts@interfy.com.au

CONTACT INTERFY SUPPORT

OneCore Users

Once you have completed the above pre-onboarding tasks, please email support@interfy.com.au to let them know. In the same email, provide details of the One Core Account users i.e. First Name, Last Name and email address/es. There is no limit to how many users you can have, and you can add people later if required, by simply emailing support with their details. Customer's generally have a couple of users, the integration on boarder and settings custodian and a dashboard transaction monitor who is generally someone from the accounts team.

Authorised Support Contacts

Please also advise us who your authorised contacts are for our support system. These people might not have OneCore access but can email support with queries.








PROCORE/QBO INTEGRATION MAP



Consult | Implement | Success

PROCORE

INTUIT quickbooks

MAPPING		
Mapped in OneCore under consultation and tailored to your specific circumstances		
PROJECTS/SUB JOBS Existing Projects	➤➤➤ ➤➤➤	CUSTOMERS Sub-Customer (Projects)
COST TYPES	➤➤➤ ➤➤➤	CLASSES
STANDARD COST CODES	➤➤➤ ➤➤➤	CHART OF ACCOUNTS
COMPANIES	➤➤➤ ➤➤➤	CUSTOMERS
LIVE SYNC / FUNCTIONALITY		
PROJECTS New Projects	➤➤➤	CUSTOMERS Sub-Customer (Projects)
COMPANIES New Companies	➤➤➤ ➤➤➤	CUSTOMERS New and Updated Customers
PRIME/HEAD CONTRACT  Progress Claims and Change Orders with Sub Jobs and Retention	➤➤➤	SALES INVOICES Sales (Invoiced)
PRIME/HEAD CONTRACT Payments Received	➤➤➤ ➤➤➤	SALES INVOICES Invoice Payments
COMMITMENTS  Progress Claims with Sub Jobs	➤➤➤	BILLS Commitment Costs (Invoiced)
COMMITMENTS Payments Issued	➤➤➤ ➤➤➤	BILLS Commitment Invoice Payments
DIRECT COSTS  Invoice	➤➤➤ ➤➤➤	BILLS/CREDIT NOTES  Multi Project Line Items
DIRECT COSTS Expense	➤➤➤ ➤➤➤	EXPENSES/ JOURNAL ENTRIES Multi Project Line Items
TIMESHEET / TIMECARD Smart Time Tracking	➤➤➤	TIMESHEET
DIRECT COST Payroll	➤➤➤ ➤➤➤	 Hours x Charge Out Rates



ONBOARDING TASKS

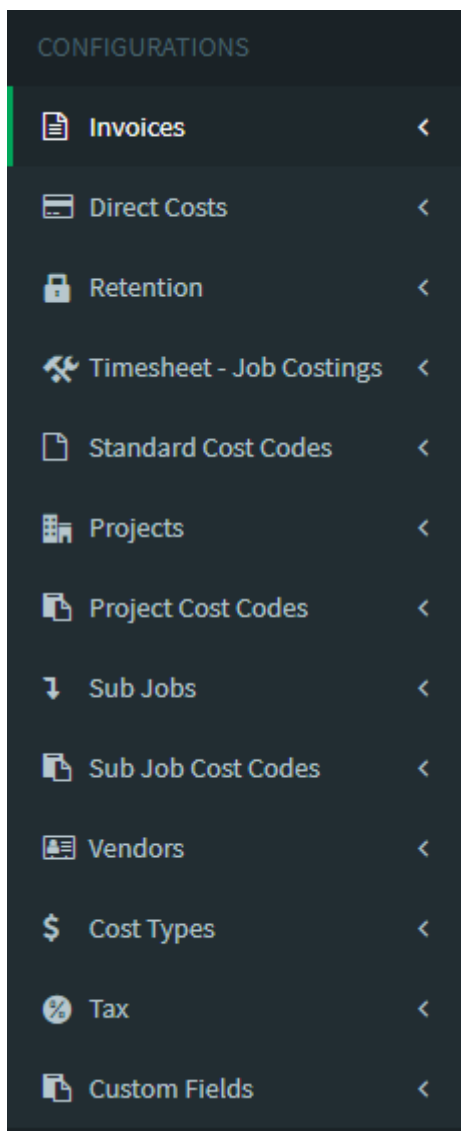
ONBOARDING - MAPPING IN ONECORE

Once we have received your email stating you have completed pre-onboarding tasks and payment has been received, our support team will configure a OneCore account and import data from both Procore and QBO where data needs to be mapped across both systems.

The onboarding activities are performed on <https://onecore-qbo.interfy.com.au>

We will attempt an auto mapping of your cost codes and Procore Vendors.

An Initial Summary Email will then be sent to you which will contain your OneCore login details, and will detail the remaining mapping tasks and settings that need to be configured on the below menu.





STANDARD COST CODE MAPPING

Cost Codes in Procore are used for Revenue (Head Contract Claims) and Expenses (Commitment Claims/Direct Costs).

Procore Standard cost codes must be mapped to a QBO account. This will allow invoice line items to be created and updated between both systems without issue.

Revenue Mapping will be used when an:

- Approved Procore Head Contract Progress Claims is integrated to QBO as a Sales Invoice
- Note: Both cost codes and cost divisions can be mapped

Customers have the option of mapping all cost codes to 1 or more revenue accounts in Xero.

Expense Mapping will be used when an:

- Approved Procore Commitment Progress Claim is integrated to QBO as a Bill
- Approved Procore Direct Cost (we call these Reverse Direct Costs) is integrated to QBO as a Bill
- Bill entered in QBO (with mapped project assigned) is integrated to Procore as a Direct Cost
- Note: Only cost codes can be mapped - not divisions.

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1 TO 1 MAPPING

You may like each Procore Cost Code to map to its own general ledger account in QBO.

We call this 1 to 1 mapping.

MULTI MAPPING

You may have more cost codes in Procore than project related general ledger accounts in QBO. In this situation you may wish to multi map, this is when you map multiple cost codes to the same QBO general ledger account. If you would like to use this approach please let us know and we will enable the multi mapping for you.

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 QBO 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 QBO contact. This will allow invoices to be created and updated between both systems without issue.

FINAL REVIEW

Once all onboarding activities are completed email support@interfy.com.au to advise you have completed the Onboarding Tasks above.

ACTIVATION

When you are ready to go live we will confirm with you which Procore Projects are to be integrated with QBO and activate.

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

TRANSACTION DASHBOARD TRAINING

Once live please book your OneCore Familiarisation session <https://interfy.com.au/support>