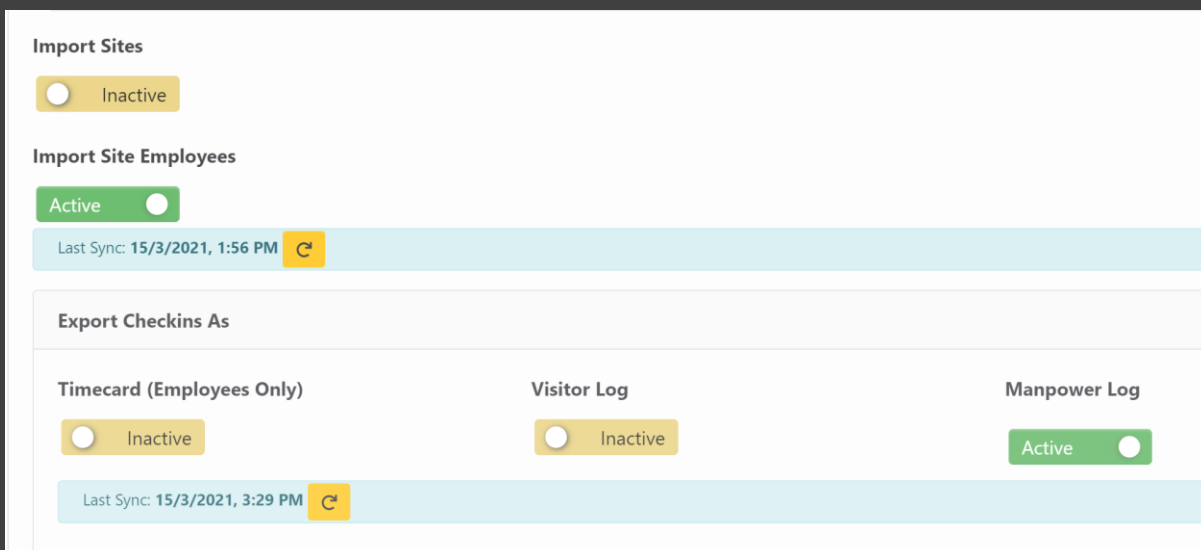


Procore - How to Set Up the 1Breadcrumb API

Simplifying Trade Communications and Automating Site Management

The current 1Breadcrumb integration allows:

- Import Sites
 - o Automatically imports sites to 1Breadcrumb from all Procore active projects.
 - o Uses the example 1Breadcrumb site template to set 1Breadcrumb site settings.
- Import Site Employees
 - o Easily import and manage Company employees in 1Breadcrumb by exporting from Procore. This can for example include any relevant documents or employee numbers.
- Timecard (Employees Only)
 - o Any employees listed in Procore, and having the same mobile number used for 1Breadcrumb, can see their check in and out data automatically populate here in each specific project.
 - o These can be used for timesheets, and/or any integrations with payroll and accounting software.
- Visitor Log
 - o Any site visitors will populate here. This can include data such as business name, industry type and the ABN of the business they are coming from. This allows for easy population of company time or trade time for each project.
- Manpower log
 - o Similar to visitor log, with more specificity for information and data collected. Where in Procore this presents in each project more accurately reflecting company time and labour hours spent on site.



The screenshot shows the 'Import Sites' section with an 'Inactive' toggle. Below it is the 'Import Site Employees' section with an 'Active' toggle and a 'Last Sync: 15/3/2021, 1:56 PM' status bar with a refresh icon. The 'Export Checkins As' section contains three sub-sections: 'Timecard (Employees Only)' with an 'Inactive' toggle, 'Visitor Log' with an 'Inactive' toggle, and 'Manpower Log' with an 'Active' toggle. A 'Last Sync: 15/3/2021, 3:29 PM' status bar with a refresh icon is at the bottom of this section.

Export Checkins As		
Timecard (Employees Only)	Visitor Log	Manpower Log
<input type="radio"/> Inactive	<input type="radio"/> Inactive	<input checked="" type="radio"/> Active
Last Sync: 15/3/2021, 3:29 PM		



1Breadcrumb

1 - From the Procore home page when you are in company mode, and not to a specific project, select "Company Tools" from the top bar.

PROCORE | 1Breadcrumb Demo Company US... | Select a Project | Company Tools | Portfolio | Favorites

Apps | Select an App | PH

PORTFOLIO | Projects | Executive Dashboard | My Open Items | Financial Views | Export

Search for projects | Q | Group By: None | Add Filters | Clear All

Displaying 1 - 3 of 3

Name*	Project Number	Address	City	State	ZIP	Phone	Program	Status	Stage	Type	Department	Notes
Project 1	123456	28 tacoma rd	Park Orchards	Victoria	3114			Active				(edit)
Project 2	123457	29 Tacoma Road	Park Orchards	Victoria	3114			Active				(edit)
Project 3	123458	29 Tacoma Road	Park Orchards	Victoria	3114			Active				(edit)

Displaying 1 - 3 of 3

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2 - Under core tools, select "Admin".

PROCORE | 1Breadcrumb Demo Company US... | Select a Project | Company Tools | Portfolio | Favorites

Apps | Select an App | PH

Core Tools | Project Management | Financial Management | Resource Management | Preconstruction

- Core Tools
 - Programs
 - Portfolio
 - Directory
 - Reports
 - Documents
 - Admin
 - Permissions
- Project Management
 - Timecard
 - Schedule
 - Inspections
- Financial Management
 - ERP Integrations
- Resource Management
 - Equipment
 - Timesheets
- Preconstruction
 - Planroom
 - Prequalifications
 - Prequalification Portal

Custom Tools | Dashboard

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3 - Please select from the right-hand side, "Service Accounts".

The screenshot shows the Procore Admin interface. The top navigation bar includes the Procore logo, a dropdown for '1breadcrumb Demo Company US...', a dropdown for 'Company Tools' with 'Admin' selected, and a 'Favorites' star icon. On the right, there are links for 'Apps', 'Select an App', a notification bell, and a user profile 'PH'. The main content area is titled 'ACCOUNT INFORMATION' and includes a 'DETAILS' section with a table showing 'Creation Date' (03/08/2021), 'Project Cap' (1), and '3 of Unlimited in use'. Below this is a 'TOOLS' section with a table of tools categorized by 'Product Category' and 'Contract Type'. The right-hand sidebar contains a 'COMPANY SETTINGS' menu with options like 'Account Information', 'App Management', 'Certification Analytics', 'Classifications', 'Cost Code', 'Cost Types', 'Expense Allocations', 'General Settings', 'Root Cause Analysis', and 'Service Accounts' (highlighted with an orange box). Other sections in the sidebar include 'PROJECT SETTINGS' (Dates, Defaults, Fieldset, Roles) and 'TOOL SETTINGS' (Action Plans, Bidding, Budget, Change Management, Contracts). A 'Minimize Sidebar' button is at the bottom right.

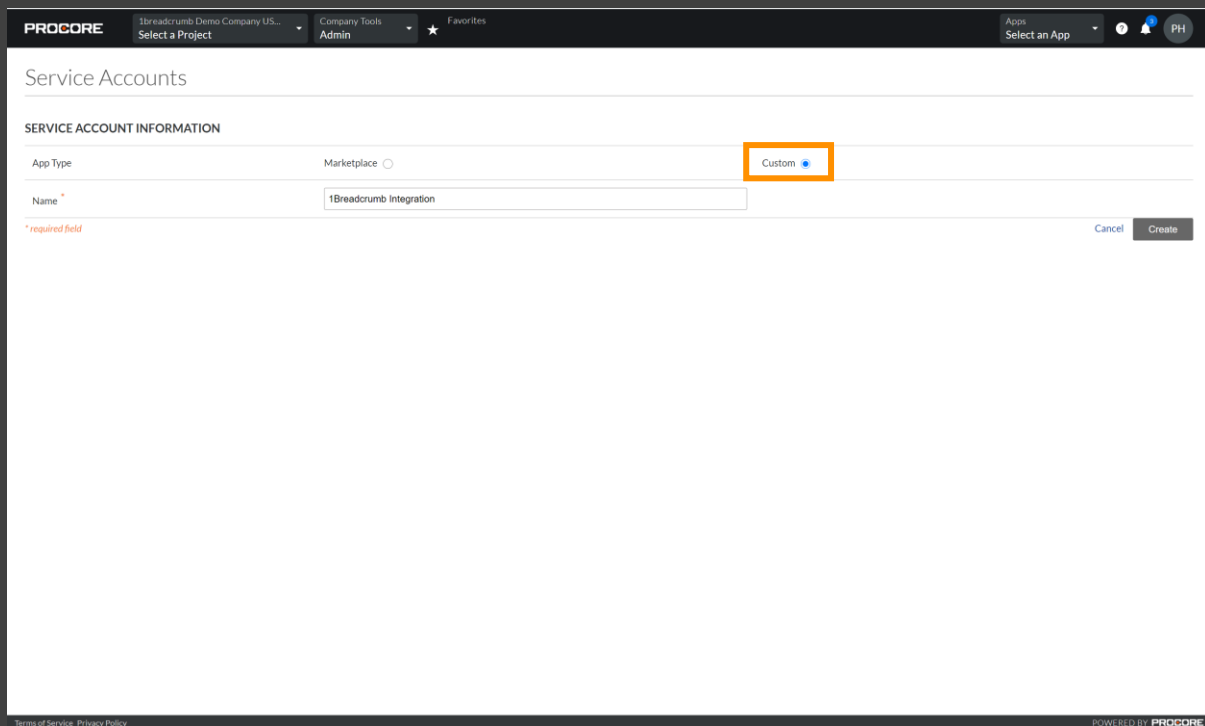
Tools by Product Category	Contract Type
Core Tools	
Directory	Licensed
Documents	Licensed
Permissions	Licensed
Reports	Licensed
Tasks	Licensed
Project Management	
Financial Management	
Resource Management	
Preconstruction	

4 - Select "New" in the top right-hand corner.

The screenshot shows the Procore Admin interface for the 'Service Accounts' page. The top navigation bar is the same as the previous screenshot. The main content area is titled 'Service Accounts' and contains a table with two rows of service accounts. Each row has 'Edit' and 'View' buttons. Below the table, there is a message: 'Please refer to the following support article. You will need this Procore-Company-Id 562949953436239 to complete your configuration.' The right-hand sidebar is the same as the previous screenshot, with 'Service Accounts' highlighted in the 'COMPANY SETTINGS' menu. A '+ New' button is highlighted with an orange box in the top right corner of the main content area. A 'Minimize Sidebar' button is at the bottom right.

Name	App Name
1breadcrumb-procore-integration-1breadcrumb-demo-company-us02	Custom
second-service-account-1breadcrumb-demo-company-us02	Custom

5 - Select "Custom" and type in a name, for example "1Breadcrumb Integration".



PROCORE 1breadcrumb Demo Company US... Company Tools Admin Favorites Apps Select an App PH

Service Accounts

SERVICE ACCOUNT INFORMATION

App Type Marketplace ☐ Custom ☒

Name * 1Breadcrumb Integration

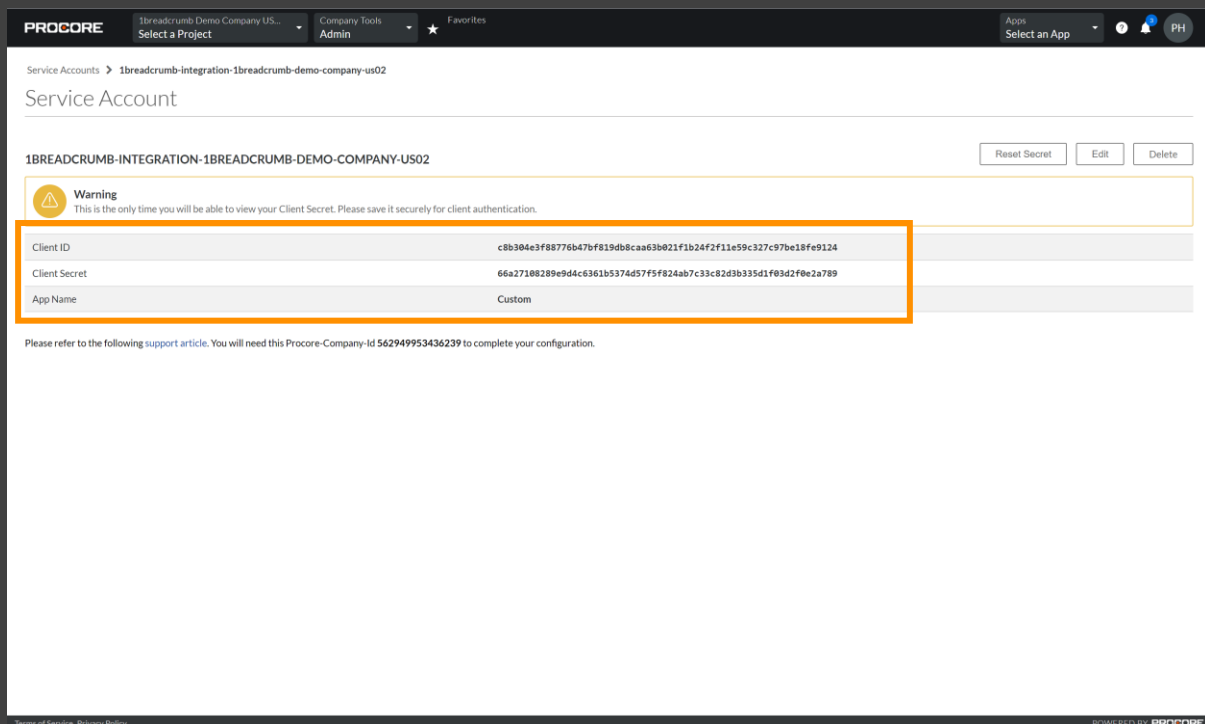
*required field

Cancel Create

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6 - The Client ID and Client Secret will now populate. Please ensure you copy and paste these into a word or notepad document, with no spaces, prior to leaving this page.



PROCORE 1breadcrumb Demo Company US... Company Tools Admin Favorites Apps Select an App PH

Service Accounts > 1breadcrumb-integration-1breadcrumb-demo-company-us02

Service Account

1BREADCRUMB-INTEGRATION-1BREADCRUMB-DEMO-COMPANY-US02

Reset Secret Edit Delete

Warning
This is the only time you will be able to view your Client Secret. Please save it securely for client authentication.

Client ID	c8b304e3f88776b47bf819db8caa63b021f1b24f2f11e59c327c97be18fe9124
Client Secret	66a27108289e9d4c6361b5374d57f5f824ab7c33c82d3b335d1f03d2f0e2a789
App Name	Custom

Please refer to the following support article. You will need this Procore-Company-Id 562949953436239 to complete your configuration.

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Example:

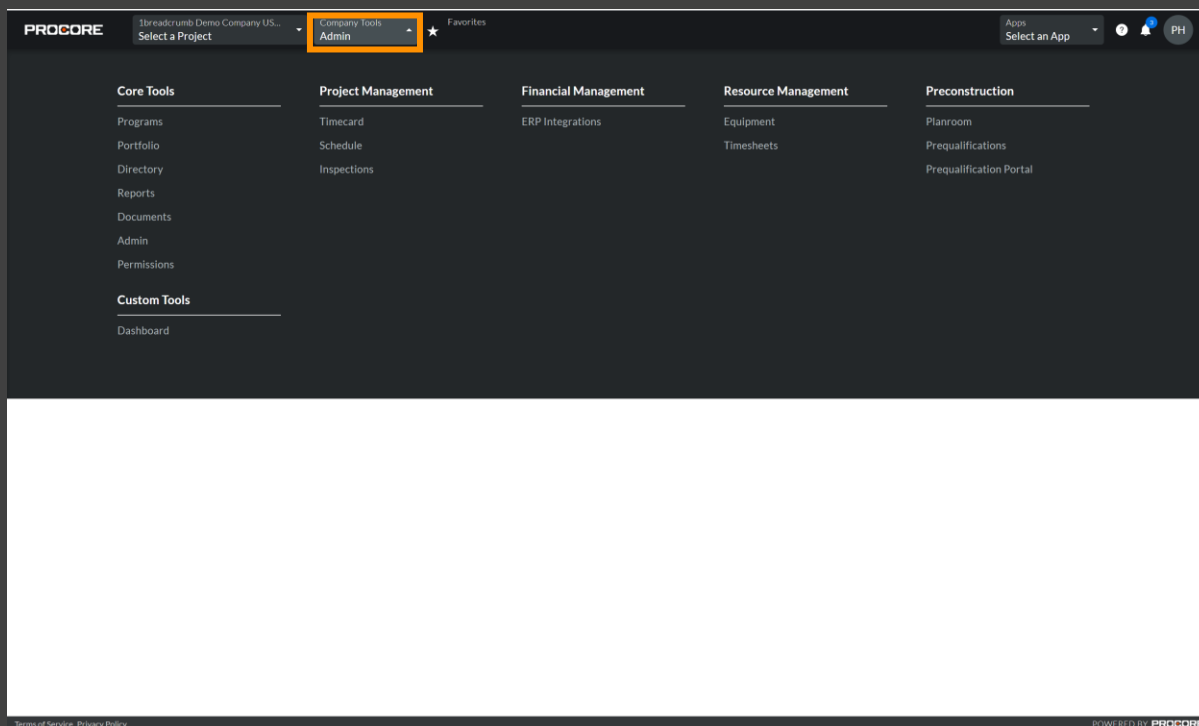
Client ID - c8b304e3f88776b47bf819db8caa63b021f1b24f2f11e59c327c97be18fe9124

Client Secret - 66a27108289e9d4c6361b5374d57f5f824ab7c33c82d3b335d1f03d2f0e2a789

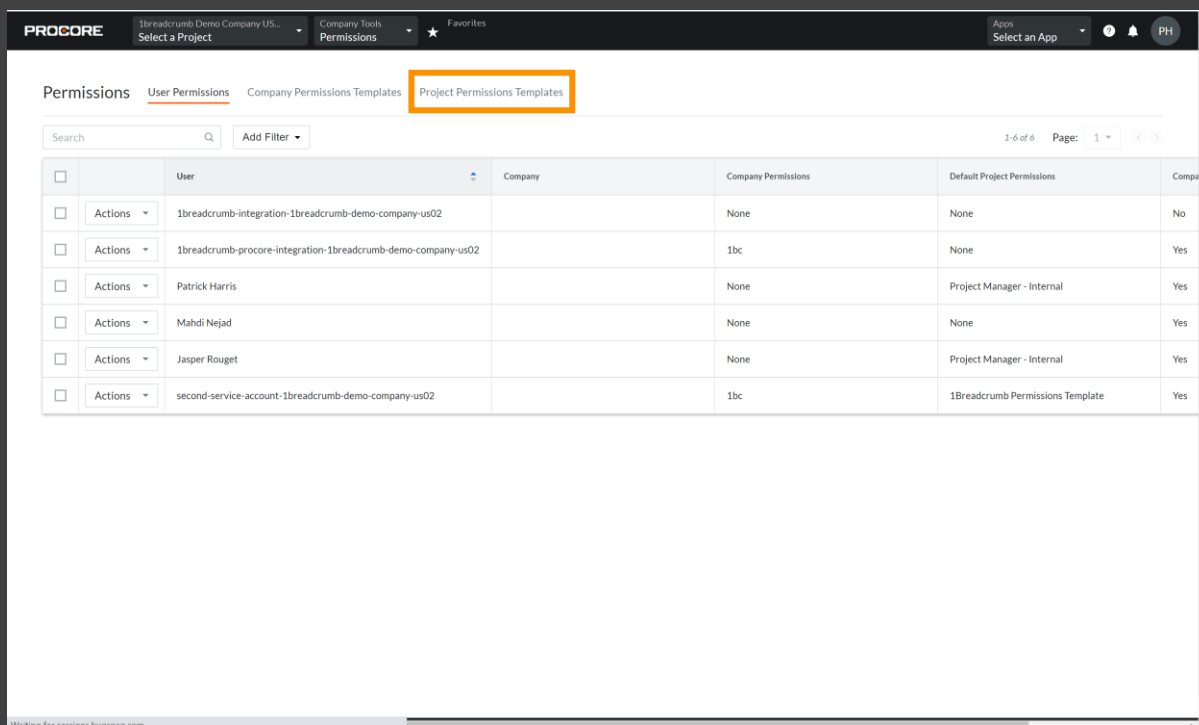


1Breadcrumb

6 - Once you have copy and pasted the client ID & Secret, please navigate to the top toolbar "Company Tools" and select "Permissions" on the left-hand side.



7 - Select "Project Permissions Template" and then the orange button "Create Project Permissions Template", for a GLOBAL template.





1Breadcrumb

8 - As can be seen, the pop-up box should say "Create Global Permissions Template".

The screenshot shows the PROCORE interface with the 'Permissions' tab selected. A pop-up box titled 'Create Global Permissions Template' is displayed in the center. The pop-up box has a close button (X) in the top right corner. Below the title is a text input field containing '1Breadcrumb Permissions Template'. At the bottom of the pop-up box are two buttons: 'Cancel' and 'Confirm'.

9 - The populate permissions per below screenshot:

The screenshot shows the PROCORE interface with the 'Edit Template' page for '1Breadcrumb Permissions Template'. The page has a header with 'Project Permissions Templates > Edit Template' and a sub-header '1Breadcrumb Permissions Template.'. Below the header are three tabs: 'Edit Template', 'Manage Assignable Templates', and 'Manage Users'. The 'Edit Template' tab is active. The main content area is a table with the following columns: 'Permissions Tools', 'None', 'Read Only', 'Standard', and 'Admin'. The table lists various permissions tools and their corresponding status (checked or unchecked).

Permissions Tools	None	Read Only	Standard	Admin
Core Tools				
Admin	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Directory	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Documents	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Home	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reports	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tasks	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Project Management				
Action Plans	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Coordination Issues	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Daily Log	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Drawings	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Emails	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Forms	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Incidents	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Inspections	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Instructions	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



10 - Select "Company Permissions Templates" and "Create New Template".

PROCORE | 1Breadcrumb Demo Company US... | Select a Project | Company Tools | Permissions | Favorites | Apps | Select an App | PH

Permissions | User Permissions | **Company Permissions Templates** | Project Permissions Templates | Reporting | **+ Create Company Permissions Template**

1-2 of 2 | Page: 1

Company Permissions Templates		Active Users	Inactive Users
Actions	1bc	2 Users	0 Users

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11 - Populate permissions, per below template:

PROCORE | 1Breadcrumb Demo Company US... | Select a Project | Company Tools | Permissions | Favorites | Apps | Select an App | PH

Company Permissions Templates > Edit Template

1Breadcrumb - Company Permissions Template

Edit Template | Manage Users

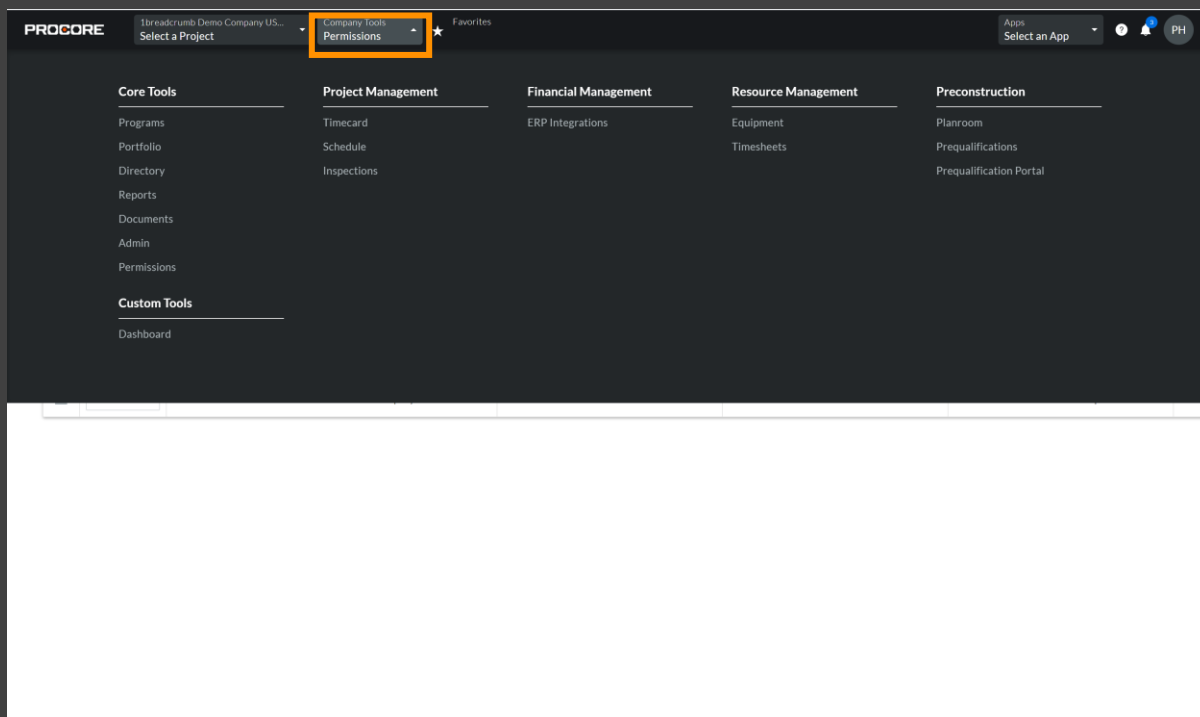
Cancel | Save

Permissions Tools	None	Read Only	Standard	Admin
Core Tools				
Admin	<input type="radio"/>			<input checked="" type="radio"/>
Directory	<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"/>
Permissions	<input type="radio"/>			<input checked="" type="radio"/>
Portfolio		<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Programs	<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"/>
Project Management				
Inspections	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Schedule	<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"/>
Financial Management				
ERP Integrations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Resource Management				
Equipment	<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"/>
Preconstruction				

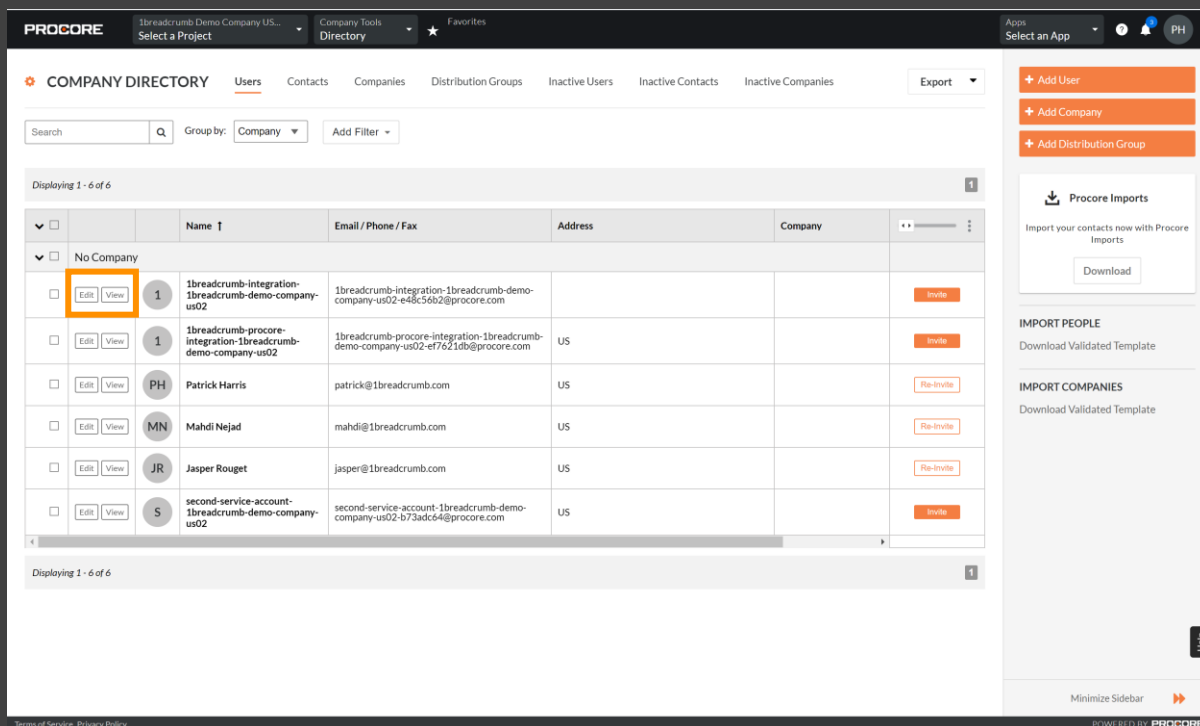


1Breadcrumb

12 - Having selected "Save", then select "Company Tools" and "Directory" at the top toolbar.



13 - Select Edit - to the service account which was initially created. For this demonstration it was "Breadcrumb Integration".



14 – Scroll down to “Company Permission Templates, and select the template previously created.

COMPANY PERMISSIONS TEMPLATES:
Do Not Apply A Permission Template

Name	None	Read Only	Standard	Admin
Programs	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Portfolio	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Planroom	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Prequalifications	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Prequalification Portal	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Timecard	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Schedule	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Directory	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reports	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Documents	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ERP Integrations	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Inspections	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Admin	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Equipment	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Timesheets	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Permissions	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

PROJECT SETTINGS

New Project Settings

Default permission template when added to projects: None Select Default Template Configure Templates

☐ Add 1breadcrumb-integration-1breadcrumb-demo-company-us02 to all new projects in 1breadcrumb Demo Company US02

☐ Allow 1breadcrumb-integration-1breadcrumb-demo-company-us02 to create new projects (1breadcrumb-integration-1breadcrumb-demo-company-us02 will have full administrative access to any projects that they create)

Minimize Sidebar

15 – Following the above step, scroll down further and set project specific settings. The recommended settings are:

- Tick the box “Add 1Breadcrumb Integration to all new projects
- Disable tick box “Allow 1Breadcrumb to create new projects

PROJECT SETTINGS

New Project Settings

Default permission template when added to projects: None Select Default Template Configure Templates

☐ Add 1breadcrumb-integration-1breadcrumb-demo-company-us02 to all new projects in 1breadcrumb Demo Company US02

☐ Allow 1breadcrumb-integration-1breadcrumb-demo-company-us02 to create new projects (1breadcrumb-integration-1breadcrumb-demo-company-us02 will have full administrative access to any projects that they create)

Current Project Settings
1breadcrumb-integration-1breadcrumb-demo-company-us02 currently has access to the following projects:
Remove All

Project Number	Project Name ▲	Current Permission Template
123456	Project 1	(None) Add
123457	Project 2	(None) Add
123458	Project 3	(None) Add

Projects 1breadcrumb-integration-1breadcrumb-demo-company-us02 Does Not Belong To
Add All

Project Number	Project Name ▲	Current Permission Template
123456	Project 1	(None) Add
123457	Project 2	(None) Add
123458	Project 3	(None) Add

* required field

Cancel Save And Send Invitation To Procure Save

(+) SHOW CHANGE HISTORY

Minimize Sidebar

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16 - Under Project Settings, Default Permission template when added to projects - click "Select default template", and choose the project template you already created.

The screenshot shows the 'PROJECT SETTINGS' page. A modal titled 'Select default permission template' is open, displaying a table of permissions for the '1Breadcrumb Permissions Template'. The modal has a 'Cancel' button and an 'Apply' button.

Tab	None	Read Only	Standard	Admin
Home	✗	✓	✗	✗
Models	✓	✗	✗	✗
Bidding	✓	✗	✗	✗
Budget	✓	✗	✗	✗
Schedule	✓	✗	✗	✗
Change Events	✓	✗	✗	✗
Change Orders	✓	✗	✗	✗
Inspections	✗	✗	✗	✗
Commitments	✓	✗	✗	✗
Emails	✓	✗	✗	✗
Coordination Issues	✓	✗	✗	✗
Crews	✓	✗	✗	✗
Daily Log	✗	✗	✗	✓
Direct Costs	✓	✗	✗	✗
Instructions	✗	✗	✓	✗

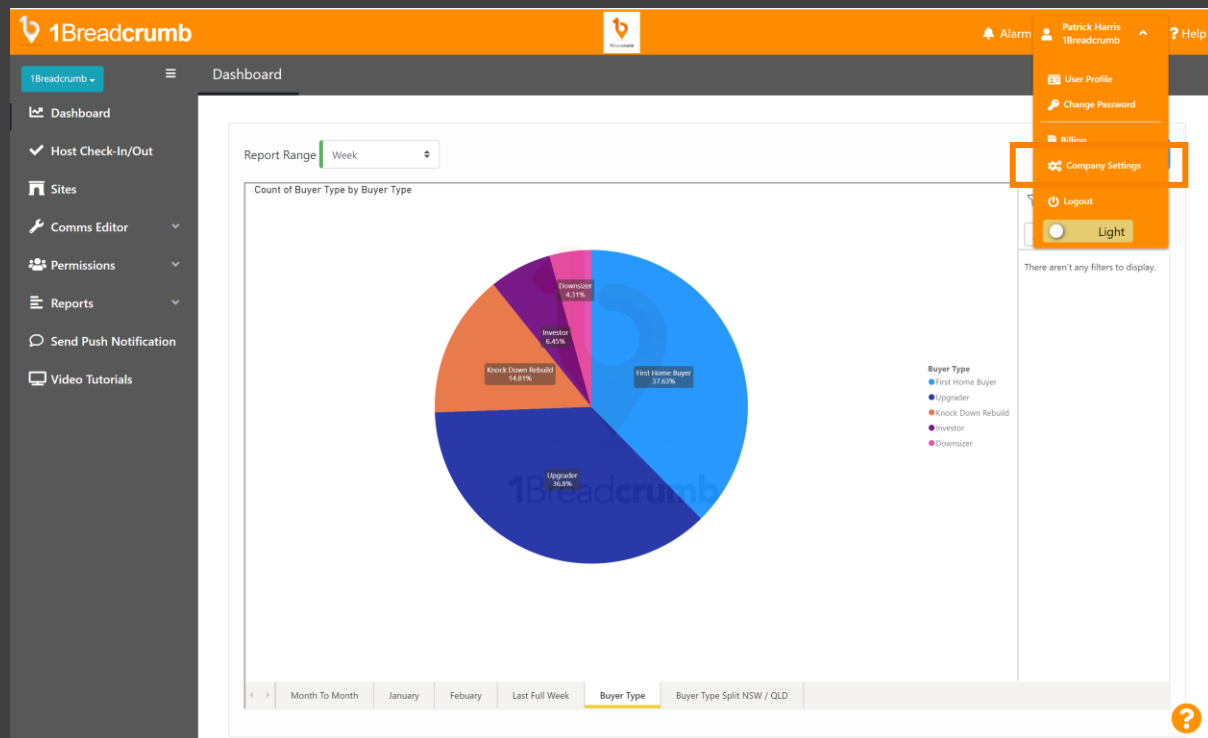
17 - Click "Add to All" and Save.

The screenshot shows the 'PROJECT SETTINGS' page. The 'Add to All' button is highlighted with a red box. The 'Save' button is also highlighted with a red box.

Project Number	Project Name	Current Permission Template
123456	Project 1	(None) <button>Add</button>
123457	Project 2	(None) <button>Add</button>
123458	Project 3	(None) <button>Add</button>

Once the above is completed, move to the 1Breadcrumb web portal at dashboard.1breadcrumb.com

1 - Select "Company Settings".



2 - After selecting "Procore Integration" select the inactive toggle, to Active and enter the Client ID and Secret. Then click "Check and Save Token". This may take upwards of 30 minutes to push through and will automatically populate to provide the extra toggles, when a connection is made.

