

# Procore Integration Guide

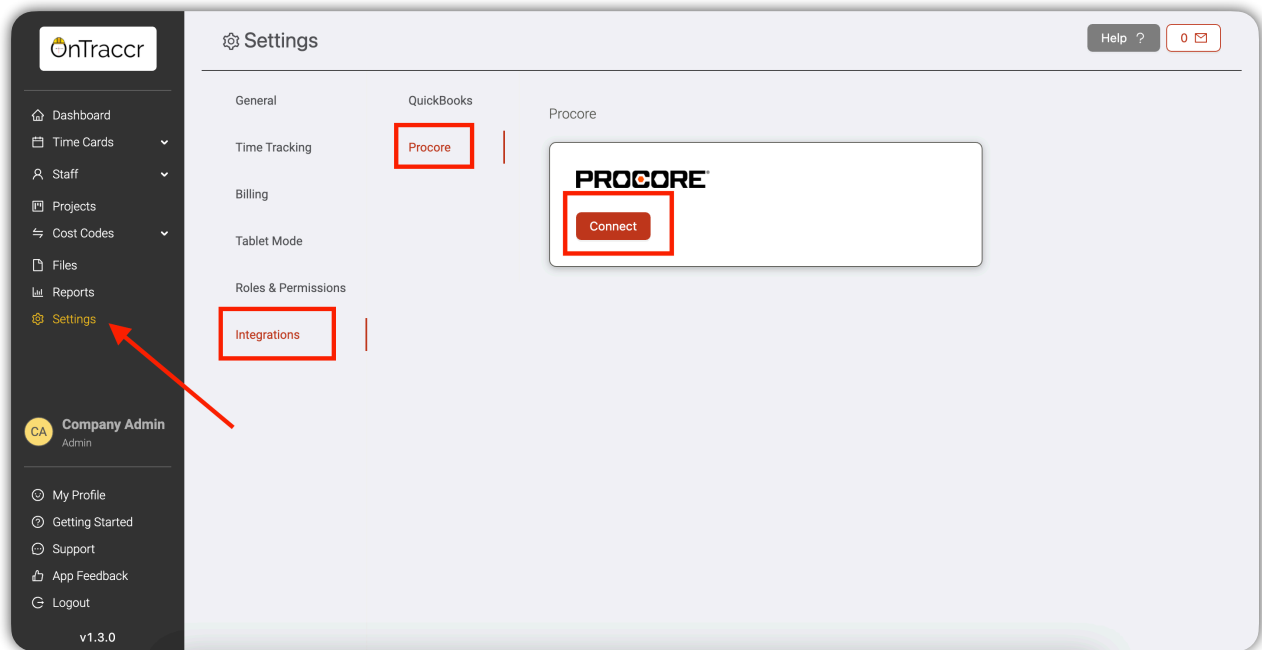
## How do I integrate OnTraccr with my Procore account?

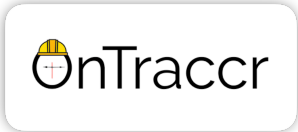
OnTraccr can directly integrate with your Procore project management software, eliminating the need to manually enter time entries when managing project financials.

Once the integration is set up, time card data will automatically be sent to Procore once time cards have been submitted/approved in OnTraccr. Users, Cost Codes, and Projects can also be synched across the two platforms to ensure that information is kept up-to-date.

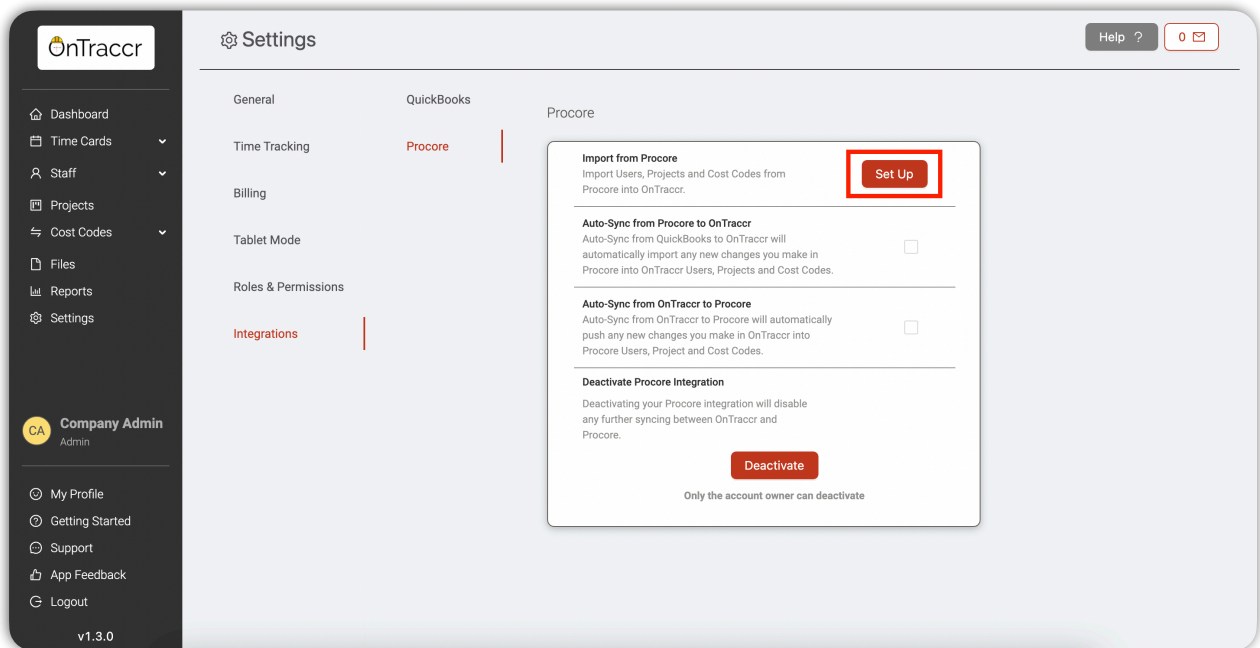
To set up integration with Procore:

1. Navigate to the **'Settings'** page and select **'Integrations'**.
2. Click the Procore **'Connect'** button to begin linking your Procore account to OnTraccr.



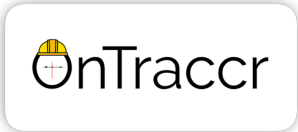


3. You will be redirected to the Procore portal to log in to your Procore account. Log in when prompted to authorize the integration with OnTraccr.
4. Once you have authorized and connected the integration with your Procore account, you will be redirected back to the OnTraccr Integrations page where you will now see a new view for integration settings with Procore.
5. Click **'Set Up'** to begin importing data from your Procore account into OnTraccr.



6. There are 5 main steps to import data from Procore into OnTraccr. The first step is to select the Procore Company and Global Cost Code List from the available options for each.
7. The second step is to import users.

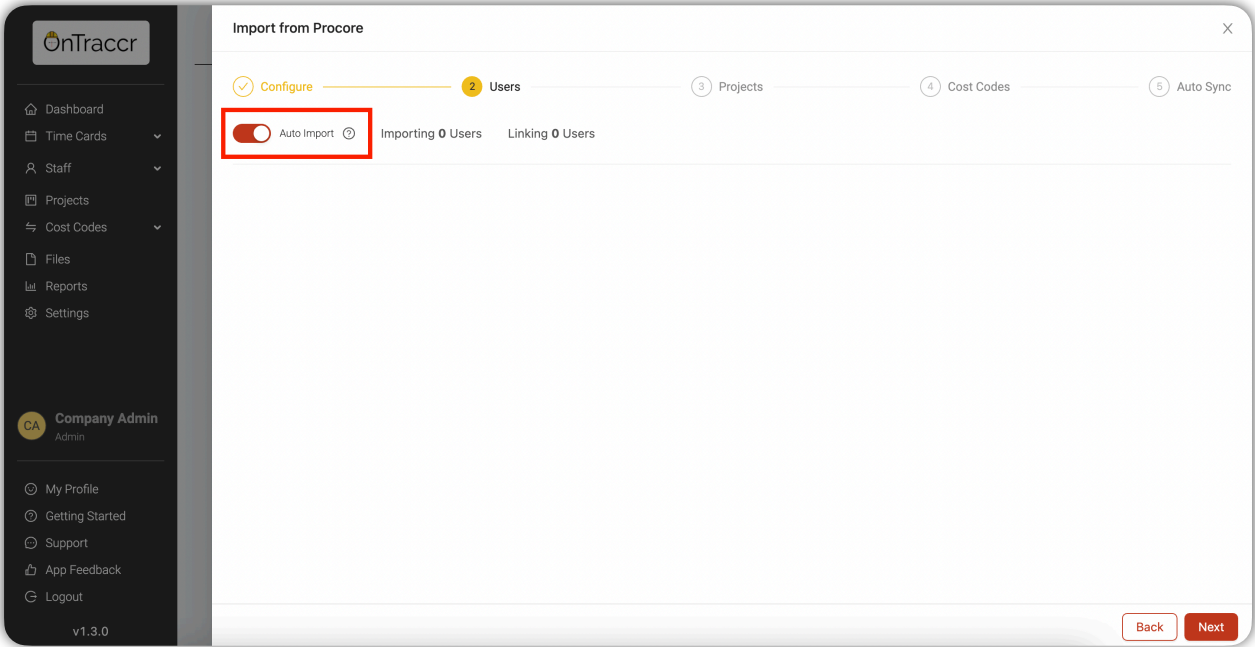
The **'Auto Import'** feature will accelerate the importing process to add your users from Procore into OnTraccr quickly. However, for Auto Import to work properly, you should make sure you follow the guidelines for how user profiles should be formatted in Procore (the guidelines can be seen by hovering over the Help icon next to the Auto Import slider). With Auto Import, all users will be



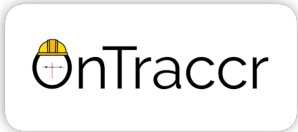
imported as ‘Worker’ roles but this can easily be edited in the user’s profile in OnTraccr afterwards.

Otherwise, if you would rather import users manually, you can also disable Auto Import. With manual import, you will see the full list of Procore user profiles that OnTraccr can see and you will have the option to configure the data fields for each profile before importing them into OnTraccr.

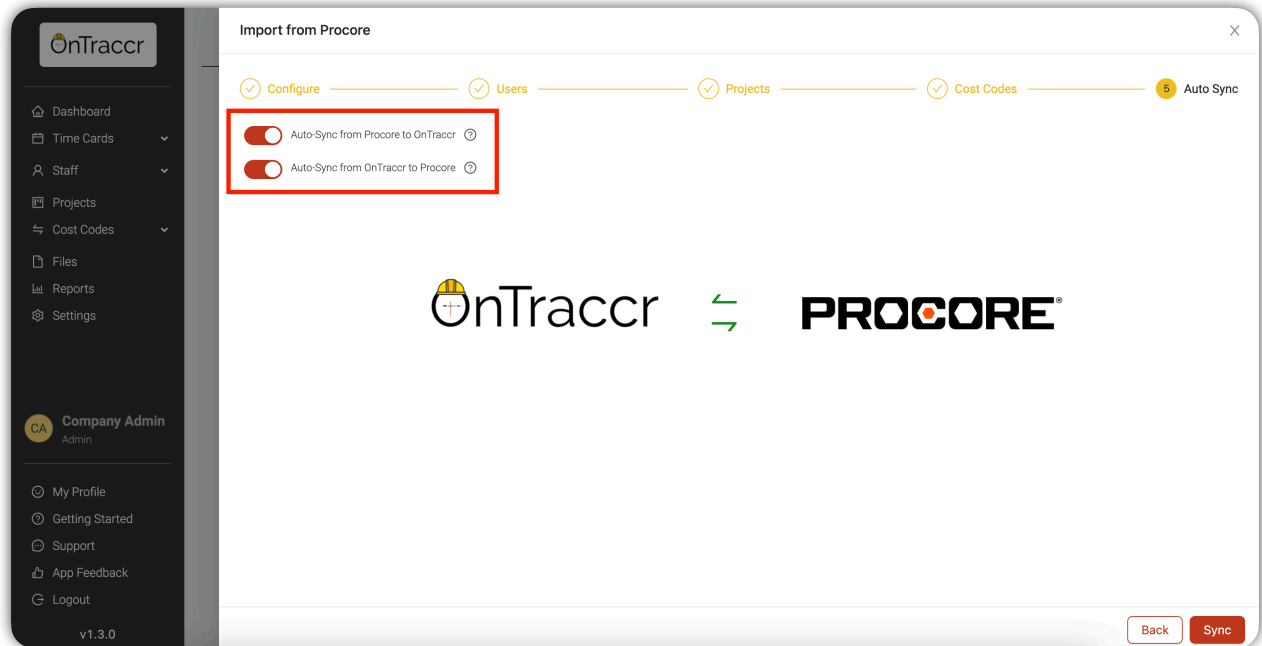
*Note: if users already exist in OnTraccr when you are trying to import them, you can choose to link the profiles so that duplicate entries are not imported from Procore.*



- 7. The third step is to import projects. Here, again, you can either import projects or choose to link to projects that may already exist in OnTraccr. Be sure to add an address for all projects you are importing into OnTraccr. Click ‘**Next**’ when you’re finished with this step.
  
- 8. The fourth step is to import cost codes. With cost codes, you also have the option to Auto Import to accelerate the import process. Otherwise, you can disable Auto Import to manually import cost codes or link them to existing cost codes in OnTraccr. Click ‘**Next**’ when you’re finished with this step.



- The final step is to choose your sync settings for the integration. Here you can choose whether you want to sync from Procore to OnTraccr or vice versa or both. Note that syncing will only work for **linked** users, cost codes, and projects only. If you un-link any of the profiles, syncing will be disabled. Click **'Sync'** when finished to complete the integration.



***For additional support from OnTraccr, please contact your OnTraccr account team or send an email to [info@ontraccr.com](mailto:info@ontraccr.com).***