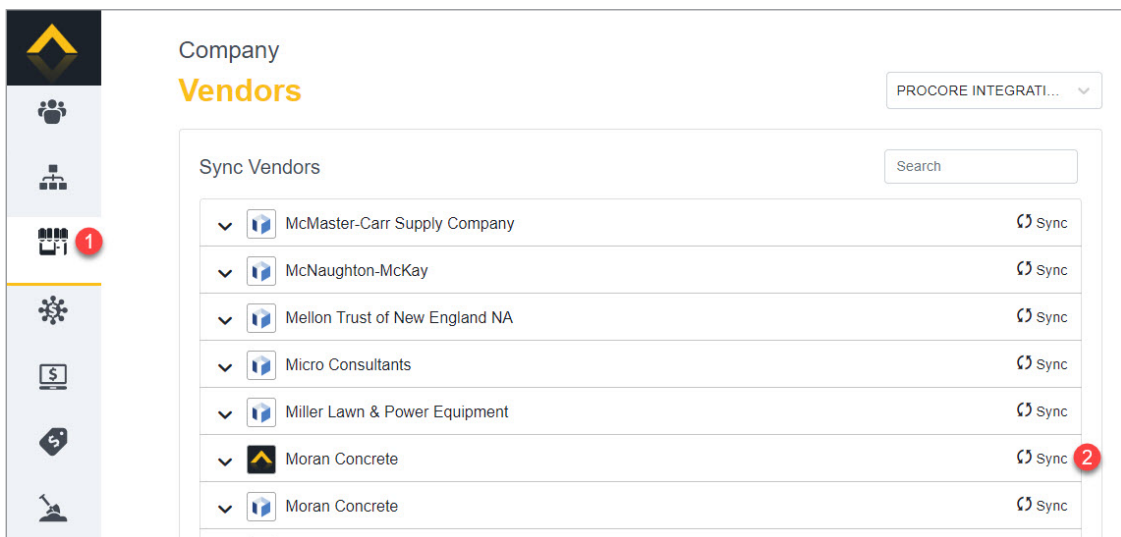


PROCORE INTEGRATION - VENDORS/COMPANIES

What Foundation labels “Vendors” Procore labels “Companies.” You can sync Vendor Records from FOUNDATION to Procore, where they will be listed as companies. You can also sync companies From Procore to FOUNDATION, where they will be listed as vendors.

SYNCING RECORDS THAT EXIST IN BOTH FOUNDATION AND IN PROCORE

1. In the Procore Integration program, click on the Vendors icon on the left side of the screen.
2. In the *Sync Vendors* section, click **Sync** next to the either the FOUNDATION vendor or the Procore company you want to sync.



3. In the *Choose an existing from below* section, click **Sync** next to the matching FOUNDATION vendor or the Procore company.



4. Click [Link].

The screenshot shows the 'Link Vendors' dialog box. At the top, there's a header with the company logo and the title 'Company Vendors'. Below this, the 'Link Vendors' section contains two vendor entries: 'Moran Concrete' (with a yellow triangle icon) and 'Moran Concrete' (with a blue square icon). A red circle with the number '4' is placed over the 'Link' button at the bottom right. A 'Cancel' button is also visible.

5. If the vendor appears in the *Resolve Discrepancies* section of the screen, resolve all discrepancies. To do so, click on the vendor.
6. Click on each field to select the appropriate value.
7. Click [Apply].

The screenshot shows the 'Resolve Discrepancies' section. At the top, there's a header with the company logo and the title 'Company Vendors'. Below this, the 'Resolve Discrepancies' section contains a list of vendors. The first vendor, 'Moran Concrete', is highlighted with a red circle with the number '5'. Below the vendor list, there's a table with the following fields: Name, Active, Address, City, State, Zip, Business Phone #, Fax Phone #, and Email Address. The 'Country' field is highlighted with a red circle with the number '6'. The 'Country' dropdown menu is open, showing 'No value' and 'US'. A red circle with the number '7' is placed over the 'Apply' button at the bottom right.

SYNCING VENDORS/COMPANIES THAT EXIST ONLY IN FOUNDATION OR PROCORE

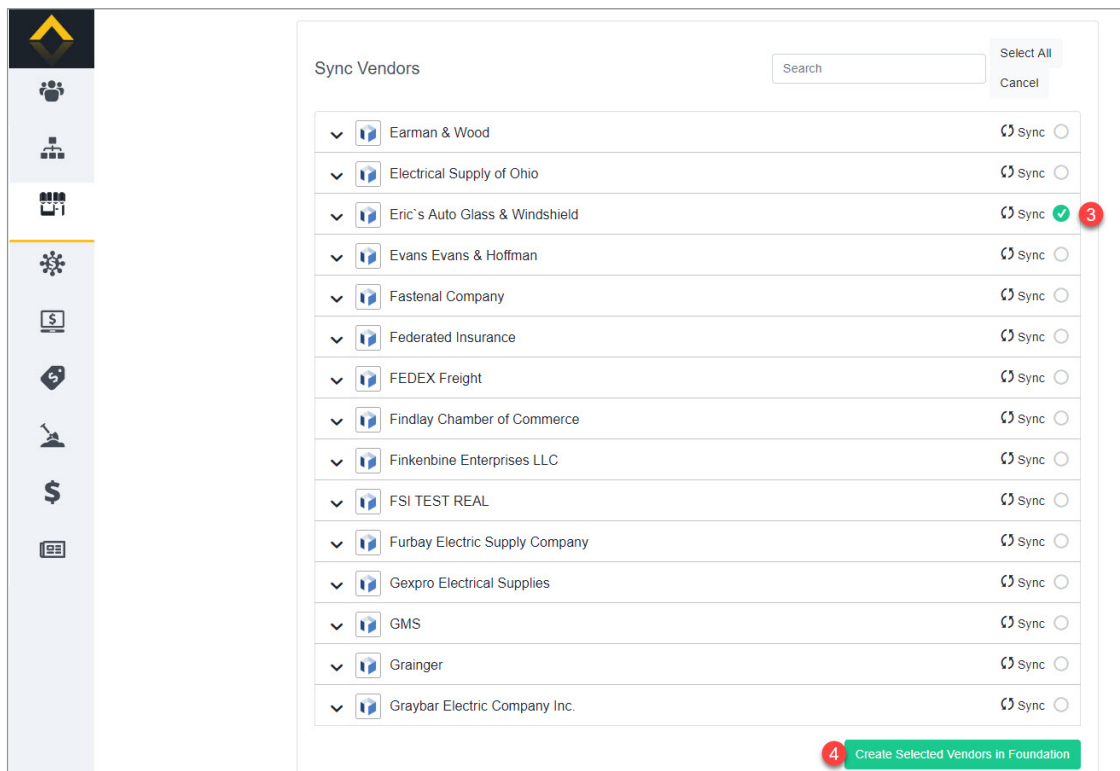
1. In the Procore Integration program, click on the Vendors icon on the left side of the screen.
2. Next to *Sync Vendors*, click [Sync Multiple].



3. Click **Sync** radio button next to the vendors you want to sync between FOUNDATION and Procore.

Once you have selected each of the vendors you want to sync, click [Create Selected Vendors in Foundation]/[Created Selected Vendors in Procore] button.

Please note that the name of the button will be determined by the program from which you are syncing. For example, if you are syncing from Procore to FOUNDATION, the button will be labeled [Create Vendors in FOUNDATION].



4. If the vendor appears in the *Resolve Discrepancies* section of the screen, resolve all discrepancies. To do so, click on the vendor.
5. Click on each field to select the appropriate value.
6. Click [Apply].

Company
Vendors

PROCORE INTEGRATI... ▾

Resolve Discrepancies

^ Eric's Auto Glass & Windshield * 5 X Unlink

Please choose the correct values for the following fields:

Address x 1289 West Main St ▾

City * 6 1... ▾
No value
Strongsville

State * Select... ▾

Zip * Select... ▾

Country * Select... ▾

Business Phone # * Select... ▾

Fax Phone # * Select... ▾

Name Eric's Auto Glass & Windshield

Active Yes

Email Address No value

7 Apply 2

The vendor is now available in both FOUNDATION and Procore.

UPDATING VENDOR INFORMATION

If you make changes to the vendor/company in FOUNDATION or Procore, the vendor/company will appear in the Resolve Discrepancies section of the Procore Integration Vendors screen. Resolve the discrepancies to make sure the information is updated in both FOUNDATION and Procore.