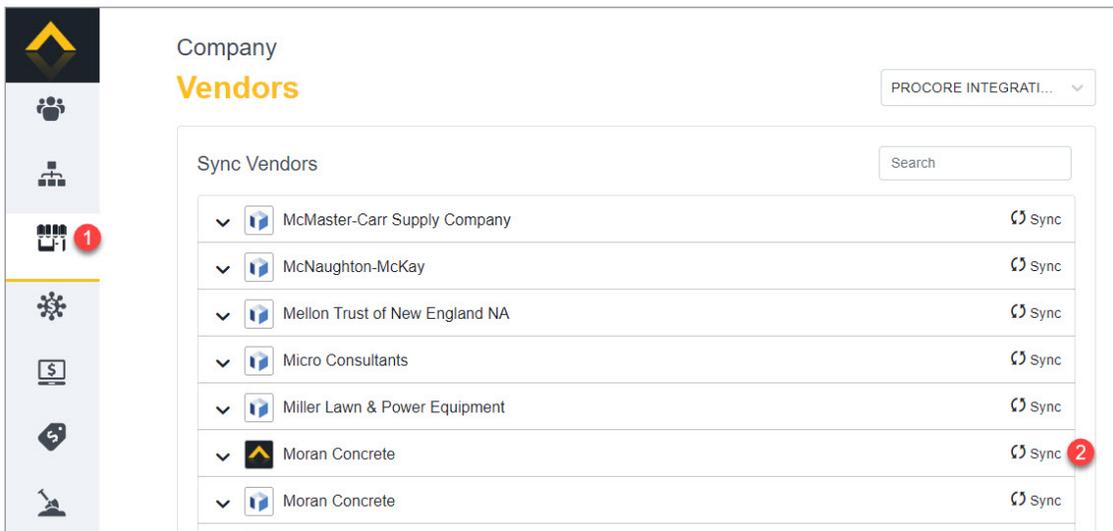


# PROCORE INTEGRATION - VENDORS/COMPANIES

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.



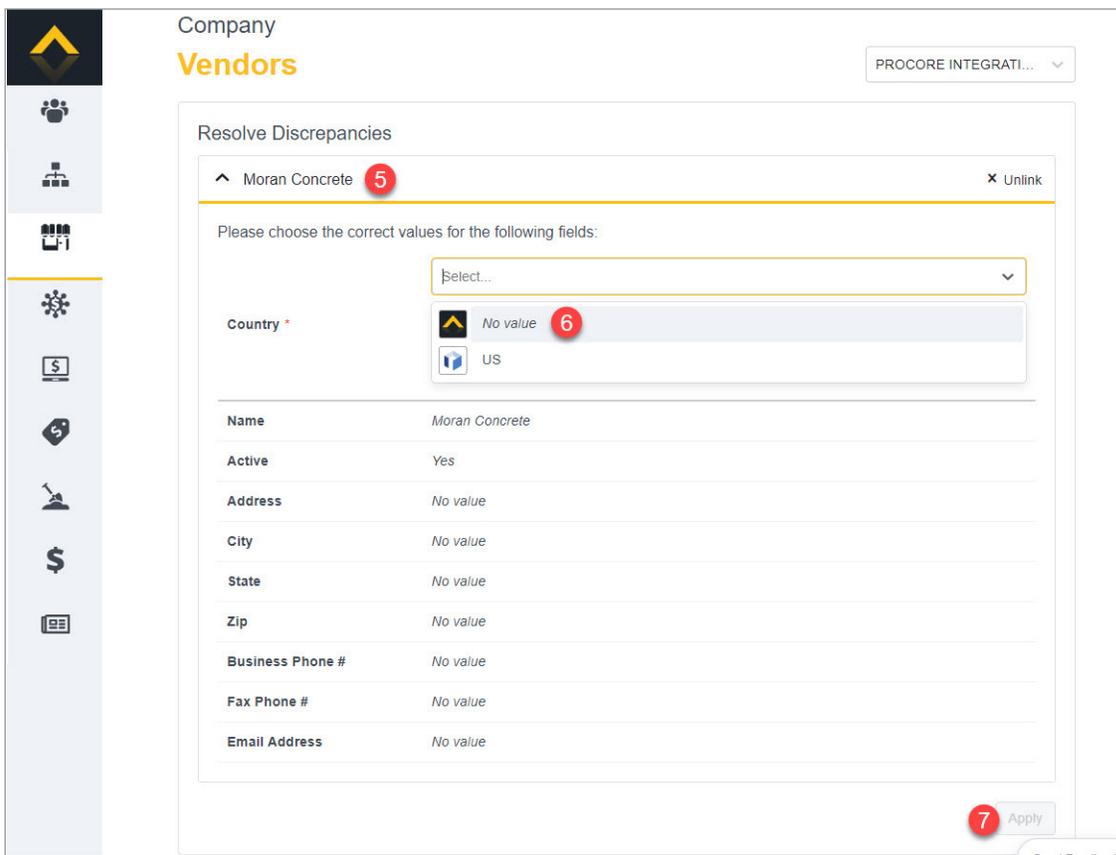
3. In the *Choose an existing from below* section, click **Sync** next to the matching FOUNDATION vendor or the Procore company.



4. Click [Link].



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].



# SYNCING VENDORS/COMPANIES THAT EXIST ONLY IN FOUNDATION OR PROCORE

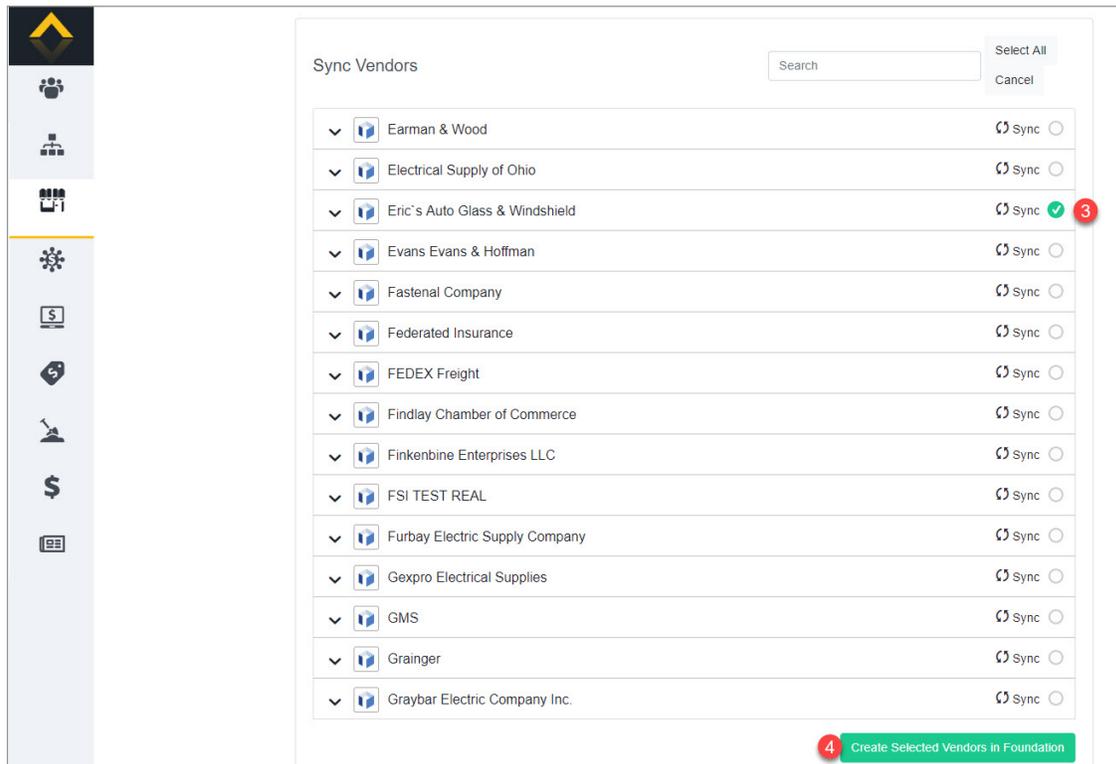
1. In the Procore Integration program, click on the Vendors icon on the left side of the screen.
2. Next to *Sync Vendors*, click [Sync Multiple].



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 ✕ Unlink

Please choose the correct values for the following fields:

**Address** \* 1289 West Main St ▾

**City** \* 6 ▾  
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.