Overview

Procore is the only comprehensive cloud-based construction project management platform with an out-of-the-box integration with Sage 300 CRE®.

Connect your accounting and project management within Procore and provide field teams untethered access to financial data. Eliminate double-entry and give project managers one-click access to accurate job costing information on the construction site. With a Sage 300 CRE® integration you can have confidence in your financial data to make the best in-the-field decisions while giving accounting peace of mind as they retain full control over data pushed into accounting.

With the Procore + Sage 300 CRE® integration, you can:

- Save time and labor by streamlining the approval process of time sensitive tasks such as commitments and change orders.
- Reduce human error by eliminating the need for manual, double-entry when transferring data from Procore to Sage.
- More efficient communication between Accounting and Project Management teams.

Architectural Diagram

The following reference architecture diagram highlights the key components of Procore’s Sage 300 CRE integration.
If you want to sync your vendor insurance from Sage 300 CRE® to Procore, your Procore point of contact can enable this configuration setting during the Implementation Process.

https://support.procore.com/integrations/sage-300-cre/about-procore-sage-300

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Powered by
Supported Versions

- Sage v16.1
- Sage v17.1
- Sage v18.1
- Sage v18.2
- Sage v18.3

Supported Features

Procore's current integration with Sage 300 CRE includes the following features.

- 2-tier and 3-tier cost codes
- Synchronization of Sage 300 CRE cost codes, categories, and job costs between Sage and Procore.
- Create a company-specific list of Sage cost codes that can be applied to each new project.
- Create commitments and commitment change orders in Procore where each line item uses Sage 300 cost codes and categories.
- Push approved commitments (e.g. Subcontracts and Purchase Orders) and change orders from Procore to Sage.
- Built-in approval workflows for commitments and commitment change orders where designated Accountants can approve/reject them in Procore; approved commitments are pushed directly from Procore to your Sage database.
- Link a Sage vendor and ID with a matching company in your Procore account's directory.
- Create a new vendor entry in Sage by importing a company entry from Procore.
- Create a new company entry in Procore by import a vendor from Sage 300 CRE and also import insurance information with the entry.
- Create a new project in Procore by importing a job from Sage.
- Import a Sage estimate into a Procore budget.
- Export a Procore Budget to Sage as an Estimate.
- Import a Sage Extra into Procore as a Sub Job.
- Export a Procore Sub Job to Sage as an Extra.

Unsupported Features

The following features are not supported at the current time.

- Non-sectioned cost codes (e.g., '1234567' where the first part of the cost code does not denote a division). Similarly, you must also have a standard cost code list.
- Cost code structures using both a dot (,) and dash (-) delimiter scheme. (e.g., 01-20.05).
• Non-use of categories. Categories must be enabled and a standard category list must be used.
• Integrate an active Procore project (i.e., that was created prior to the Procore account being integrated with Sage).
• Integrated Payment Applications and Requisitions.
• Push commitments from Sage 300 CRE to a Procore project.

Common Questions

• How does Procore connect to Sage 300 CRE?

When Procore’s ERP Integrations tool is configured to work with Sage 300 CRE®, your company's Procore Administrator will work with your Procore point of contact to install the hh² synchronization client on your Sage 300 CRE® server. The synchronization client is a lightweight, Windows desktop application that establishes a secure network connection between the hh² Cloud Service (www.hh2.com), which keeps the data in Sage 300 CRE® and Procore in sync.

Typically, the hh² synchronization client requires no special network firewall permissions, since the client only uses standard outbound TCP Port 80, and sometimes Port 443 connections, which are commonly used for standard web access. In addition, no inbound connections are required. Standard web technologies like Web Sockets is used to maintain a persistent connection.

• What is required of the IT Team?

The only requirement is to download and install the hh² Sync Client on the system running your Sage 300 CRE application (e.g., Sage 300 CRE Server). Once the initial configuration has been completed, the hh² Sync Client runs in the background as a web service.

• How is data safely transferred between Procore, hh², and Sage 300 CRE?

The hh² Cloud Service is a third-party, professional-grade Data Center that is maintained and monitored 24/7. An hh² Sync Client is installed on your Sage 300 CRE system and it uses the HTTPS protocol to keep in constant contact with your Sage data stored in the hh² data center. The hh² Sync Client also keeps your Procore data 'synced' with the hh² Data Center and Sage 300 CRE system. To be synced with Sage, the compatible data in Procore must first be sent to the ERP Integrations tool for acceptance by an accounting approver. After acceptance, your Procore data is exported to hh² and then synced with Sage 300 CRE.

• Who can authorize what?

Within Procore, any exports to Sage 300 CRE must be approved by your company's designated accounting approver(s). Any changes to the hh² Sync Client typically involves the customer's IT department or company.

See Also

• Sage 300 CRE® Permissions Matrix