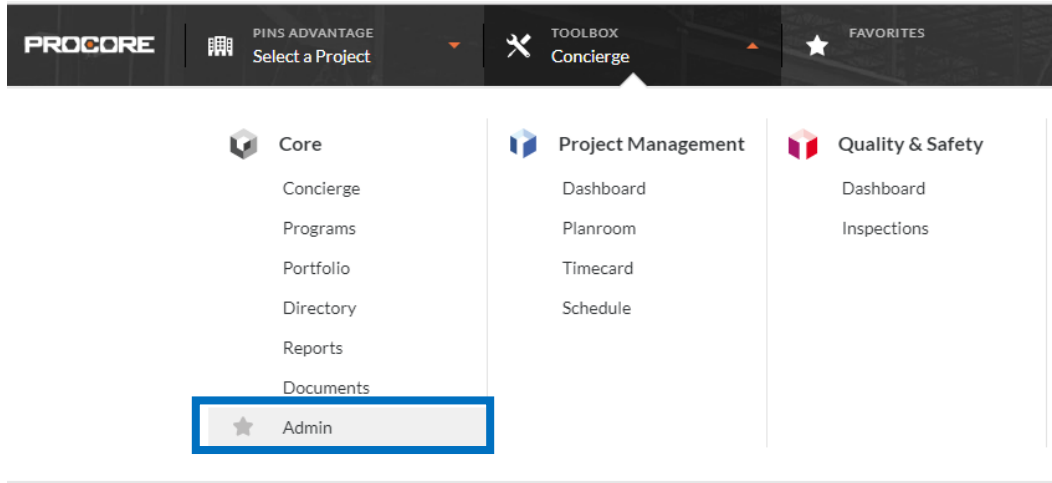
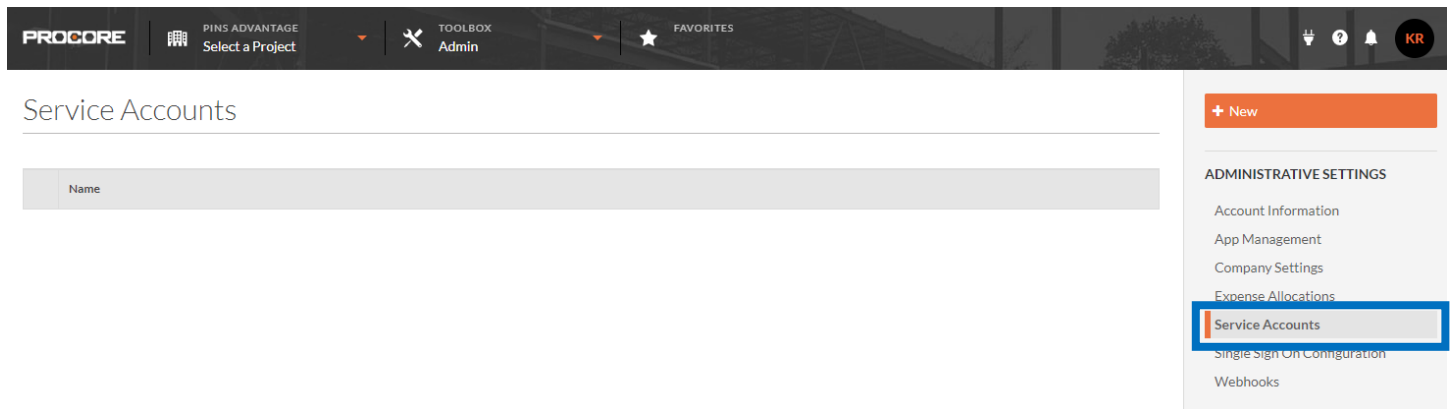


PROCORE ACCOUNT SET UP:

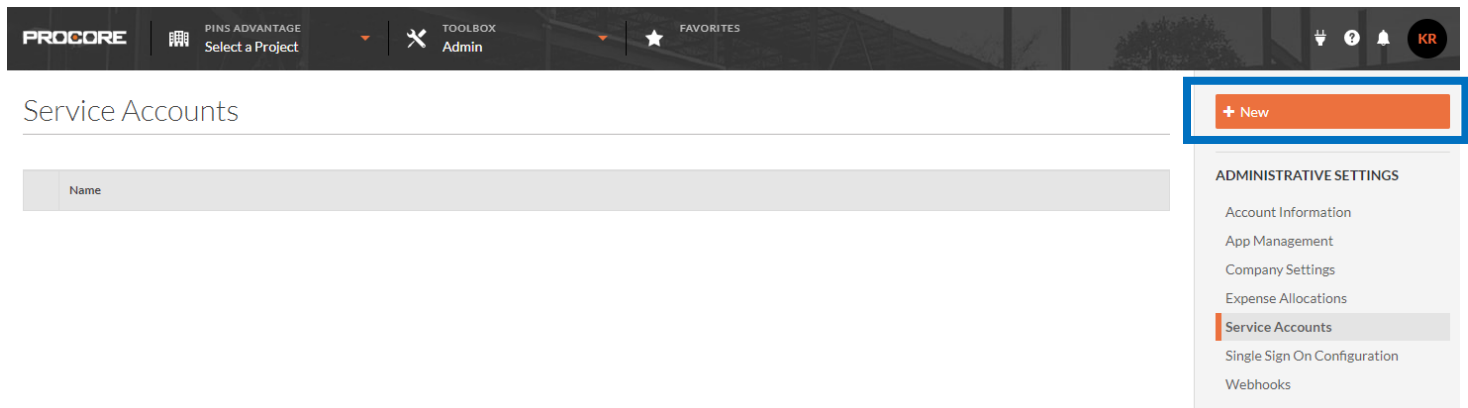
1. Login to Procore as an Admin User
2. Navigate to Toolbox -> under the Core tab -> select Admin



3. Select "Service Accounts" from the right sidebar -> this is located under Administrative Settings



4. Click "+ New"



5. Add "pins-advantage" in Name field, then click "Create"

PROCORE PINS ADVANTAGE Select a Project TOOLBOX Admin FAVORITES

Service Accounts

SERVICE ACCOUNT INFORMATION

Name * pins-advantage

*required field

Cancel Create

6. In a separate browser window go to PINSAdvantage.com, Login to PINS as an Admin User

7. Navigate to the Department List -> click "Admin"

Available Department(s)

Select a department to continue

Procore Demo Test 2
Admin

8. Click "Procore Setup"

Admin You are currently logged in as Procore 2 Test 2. (Not you? Logout)

Home

- View/Edit Departments
- Reports
- Procore Setup

Policy Statistics & Status

0	0	0	0	0
Certificates	Policies	Attachments	Pages	Size (KB)

Policy Expiration status:

In 30 days	In 60 days	In 90 days	Expired
0	0	0	0

9. Copy the Client ID and Client Secret from Procore into PINS-> select a default insurance requirements template that will be applied to each commitment that comes from Procore into PINS
->Click "Enable Procore"

Copy/Paste (for Mac):

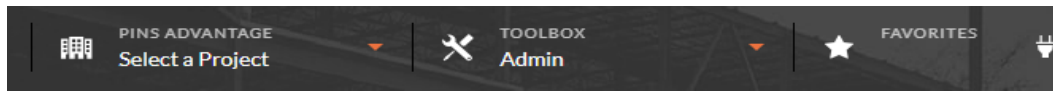
Command + c

Command + p

Copy/Paste (for PC):

CTRL + c

CTRL + p



Service Accounts > pins-advantage-pins-advantage

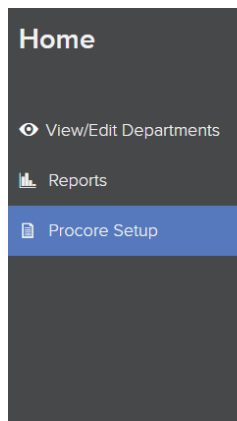
Service Account

PINS-ADVANTAGE-PINS-ADVANTAGE

Edit

Delete

Client ID	603f9844bde96e50f849fa83496a9e90ca2dc50d1fe0068c75a3f34223a532d9
Client Secret	236dc2e4ff9b86c5ef18186e916f8b02f69803b1a2aaedcb2fc3b02b83a42334



Enable Procore for Procure Demo Test 2

Procure Client ID:

Procure Client Secret:

Default Requirements Template:

After creating a template in any department, you can set your default requirements template here

10. An auto email has been sent to PINS Customer Support. The PINS support team will import all your Procure vendors and jobs. You will receive an email within 24 to 48 hours once this is completed.

