

PROCORE INTEGRATION - DEPARTMENTS

Using Procore Integration you can sync Department Records from FOUNDATION to Procore as well as from Procore to FOUNDATION.

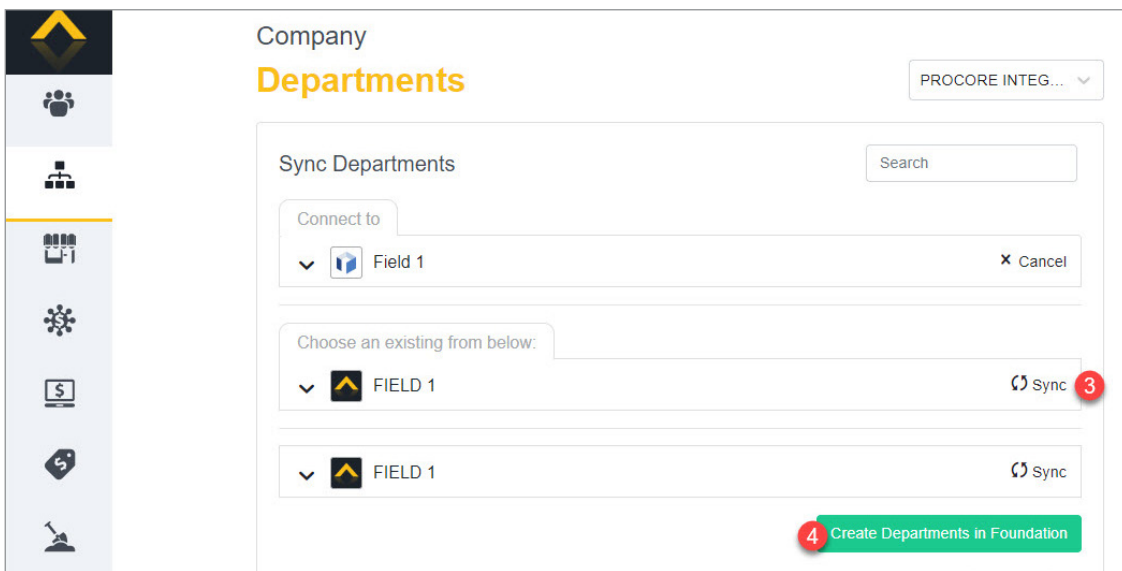
SYNCING RECORDS THAT EXIST IN BOTH FOUNDATION AND PROCORE

1. In the Procore Integration program, click on the Departments icon on the left side of the screen.
2. In the *Sync Departments* section, click **Sync** next to the Foundation or Procore department you want to sync.



3. In the *Choose an existing from below* section, click **Sync** next to the matching department.
4. [Create Departments in Procore]/[Create Departments in Foundation] 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 Departments in FOUNDATION].



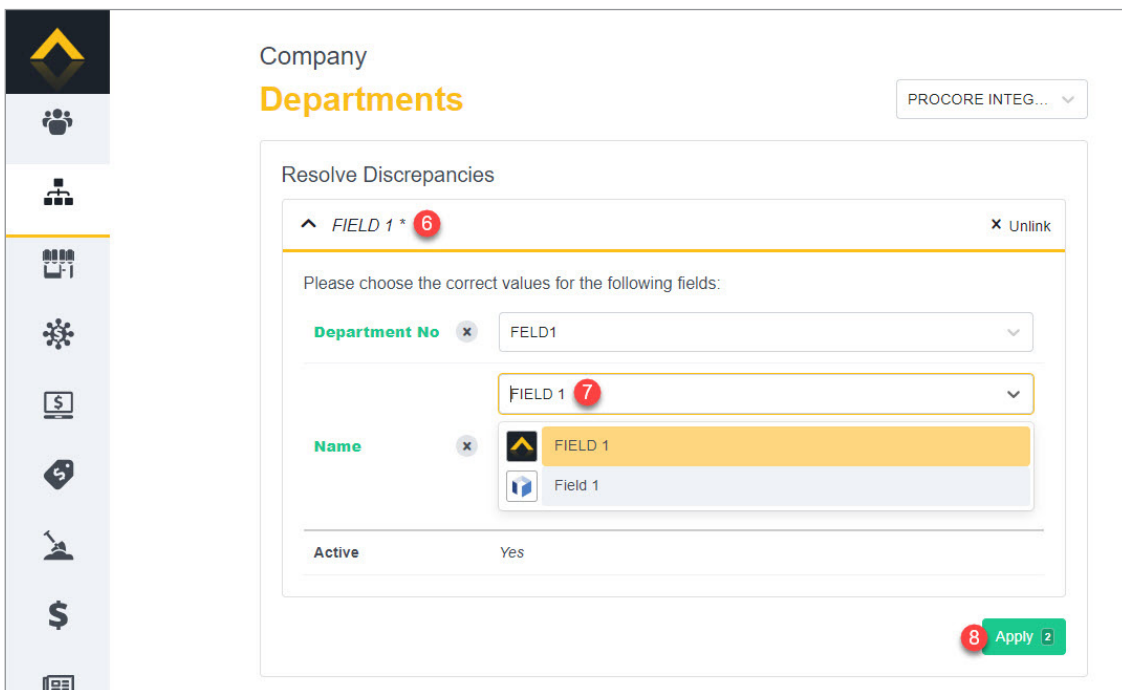
5. Click [Link].



6. If the departments appears in the *Resolve Discrepancies* section of the screen, resolve all discrepancies. To do so, click on the department.

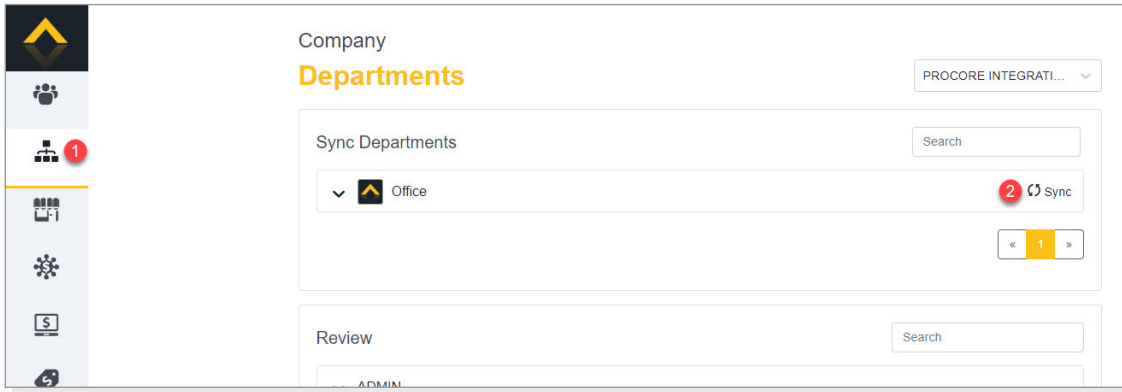
7. Click on each field to select the appropriate value.

8. Click [Apply].



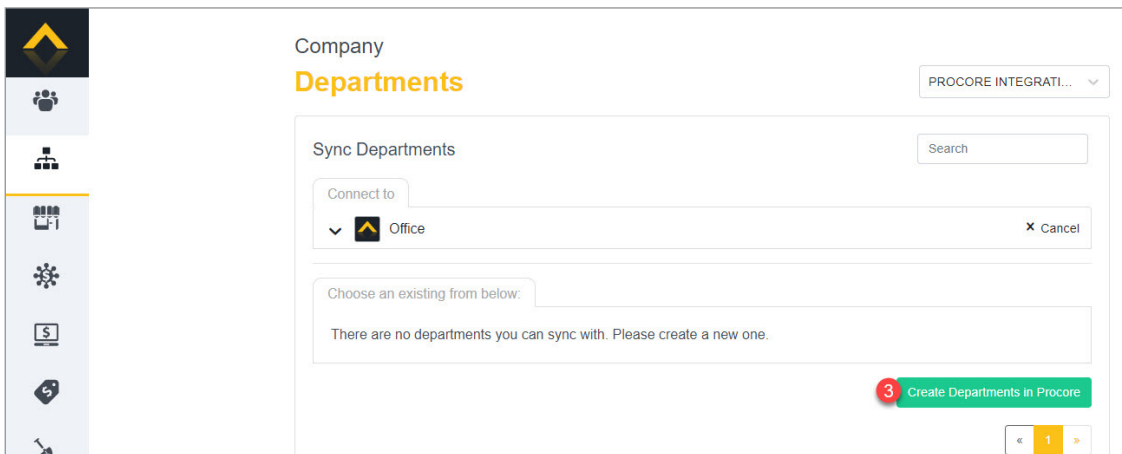
SYNCING RECORDS THAT EXIST IN ONLY FOUNDATION OR PROCORE

1. In the Procore Integration program, click on the Departments icon on the left side of the screen.
2. Under *Sync Departments*, click **Sync** next to the departments you want to sync between FOUNDATION and Procore.

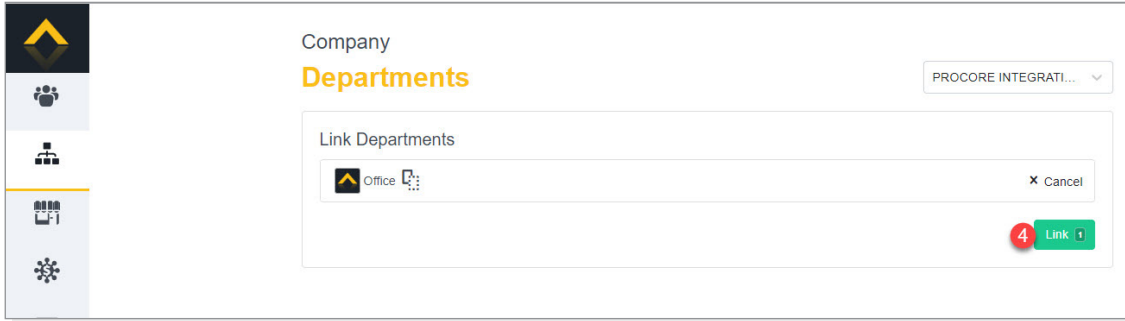


3. Once you have selected each of the departments you want to sync, click [Create Departments in Procore]/[Create Departments in Foundation] button.

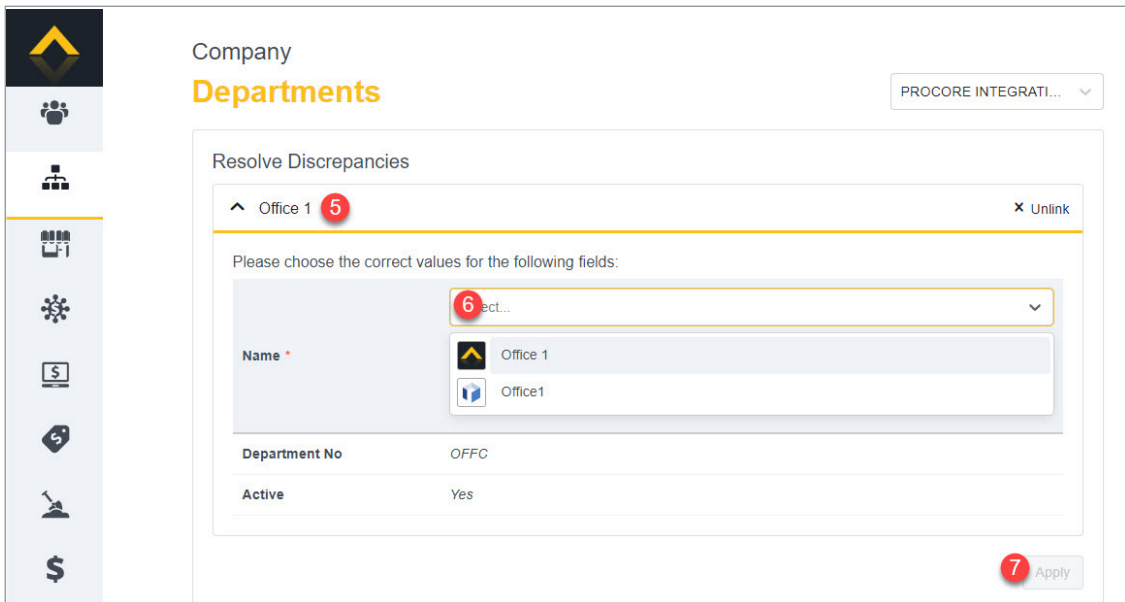
Please note that the name of the button will be determined by the program from which you are syncing. For example, if you are syncing from Procore to FOUNDATION, the button will be labeled [Create Departments] in FOUNDATION.



4. Click [Link].



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



The department is now available in both FOUNDATION and Procure.

UPDATING DEPARTMENT INFORMATION

If you make changes to the department in FOUNDATION or Procure, the department will appear in the *Resolve Discrepancies* section of the Procure Integration Departments screen. Resolve the discrepancies to make sure the information is updated in both FOUNDATION and Procure.