PROCORE INTEGRATION

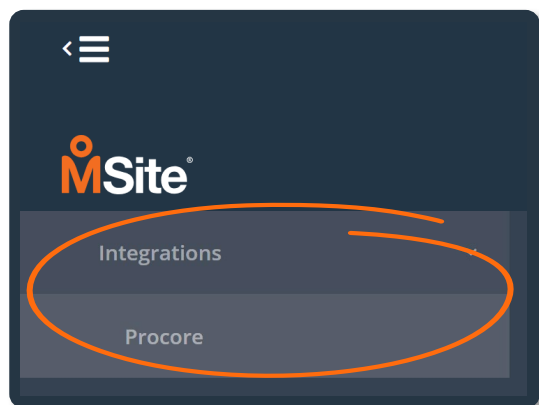## Enabling the Procore Integration

MSite's **integration** with **Procore** streamlines workforce management and simplifies reporting for site teams.
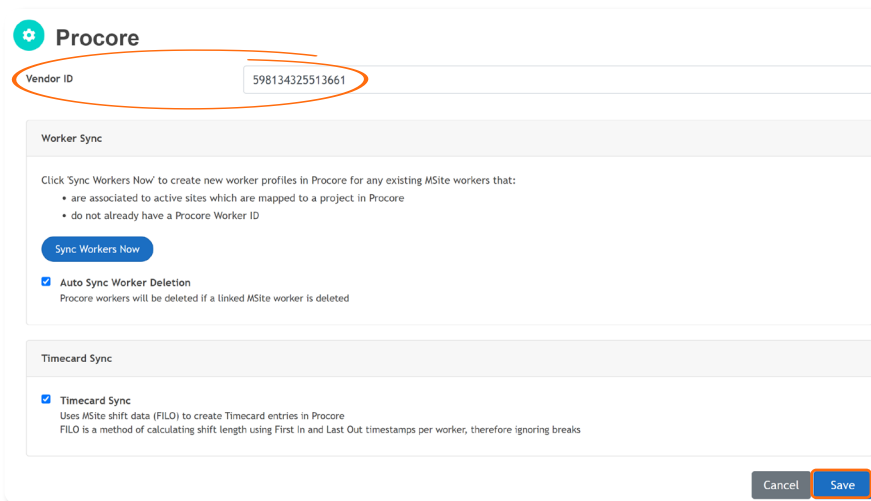
How to enable integration

1. To enable the **Procore Integration**, go to the toolbar on the left. Then select **System** followed by **Integrations**.

Clicking on **Integrations** should display a dropdown, from here, select the **Procore** option.

2. On the **Procore Integration** page, you will be required to enter the **Vendor ID**, this may also be referred to as the **Procore Company ID**. *You will be able to find this in your **Procore system**.*

Once you have entered your **Vendor ID** and select the **Save** button, the integration should now be **active**.

PROCORE *INTEGRATION*

Enabling the Procore Integration

How to enable integration

3. **Syncing Workers from MSite to Procore**

As part of the integration, you can **sync** workers from **MSite** to the **Procore** system. Syncing workers creates **new worker profiles** in the **Procore** system for any **existing** MSite workers that are associated to **active sites**, which are **mapped to a project in Procore**, and/or, any workers who **do not** already have a **Procore Worker ID**.

Additionally, **MSite** can sync **worker deletion**, this will be done **automatically** and simply means that when a worker is **deleted in MSite**, that same worker will then be **deleted in Procore**, To enable this tick the **Auto Sync Worker Deletion** checkbox.

Worker Sync

Click 'Sync Workers Now' to create new worker profiles in Procore for any existing MSite workers that:

- are associated to active sites which are mapped to a project in Procore
- do not already have a Procore Worker ID

[Sync Workers Now]

☑ **Auto Sync Worker Deletion**
Procore workers will be deleted if a linked MSite worker is deleted

---

4. **Syncing Transactional (Timecard) Data from MSite to Procore**

When **any in or out transaction** is completed by a worker who has a **Procore Worker ID**, **MSite** will **automatically** send this data to Procore, allowing for **timecard entries** to be created in the **Procore** system.

To **enable Timecard** data to be synced between the two systems, tick the **Timecard Sync** checkbox.

Timecard Sync

☑ **Timecard Sync**
Uses MSite shift data (FILO) to create Timecard entries in Procore
FILO is a method of calculating shift length using First In and Last Out timestamps per worker, therefore ignoring breaks

---

How to enable integration

5. **Linking a Site within MSite to a Procore Project**

To **sync workers** to **Procore**, you will be required to have sites on your **MSite instance** that are **linked** to a Procore project.

To **link a site** to a Procore project, open **Site Configuration**. You can do this by selecting **System** in the MSite toolbar on the left of the screen.

6.1 To create a **NEW** site select **Sites**, **Site Configuration** and then **Add Site**.
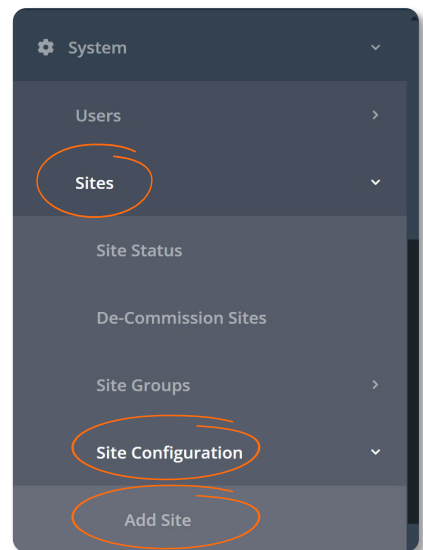
6.2 To link an **EXISTING SITE,** select **Sites**, **Site Configuration**, and then select the site from the drop-down box
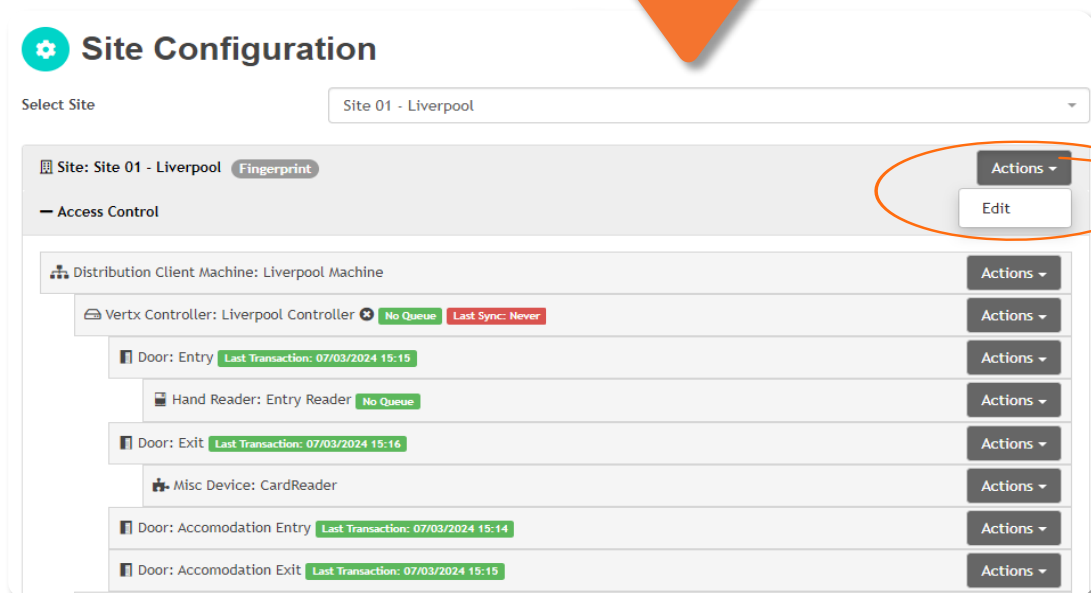
PROCORE INTEGRATION

Enabling the Procore Integration

How to enable integration

7. When you have added the new site **or** selected a site from the drop-down box.

Next select **Actions** and then **Edit.**

PROCORE *INTEGRATION*

Enabling the Procore Integration

How to enable integration

8. The **Edit Site Page** will open. From here you will be able to select the site in **Procore** you want to link to.

Once the site is selected select **Save**.

Procore Integration ❓

Procore Project

Please Select ⌄

Procore Integration ❓

Procore Project

| Please Select |
| Chicago |
| London |
| Reference A |
| Reference B |
| Reference C |
| Reference D |
| Test Project A |
| The Bunker - Demo Project |

Please Select ⌄

Edit Site ✕

Site Contact Information (Public) ❓

Site Name *	Site 01 - Liverpool
Enrolment Type *	Fingerprint
Site Group *	Default
Location	Liverpool
Manager	Neil Norman
Address	
Postcode *	L13 1FB
Phone Number	0151123456
External ID ❓	
Notes	

Site Project Information (Public) ❓

| Project Start Date | | Clear 📅 |
| Project End Date | | Clear 📅 |

Procore Integration ❓

| Procore Project | Please Select ⌄ |

Site Opening Times (Public) ❓

Site Open From * ❓	09:00 🕐
Site Open Until * ❓	17:00 🕐
Working Days * ❓	All Selected

Site Delivery/Collection Information (Public) ❓

Notice Period * ❓	1	Days
Instructions	All deliveries to access site from J5 of M62. Avoid local traffic routes.
Auto Accept * ❓	Off
Max Bookings per Slot * ❓	2
Overboarding Options * ❓	Warn

Site Advanced Information (HRS) ❓

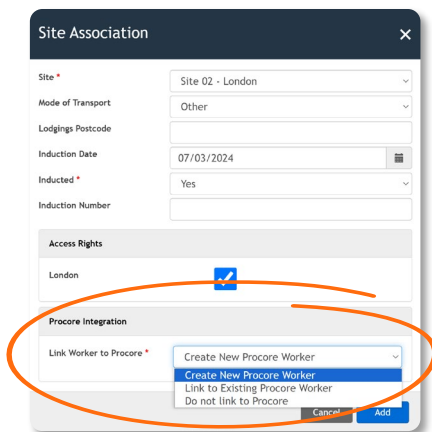| Distance Calculation Enabled | ☐ |
| HRS Project ID * ❓ | |
| Use HTTP Distribution API | ☐ |

Cancel | Save

PROCORE *INTEGRATION*
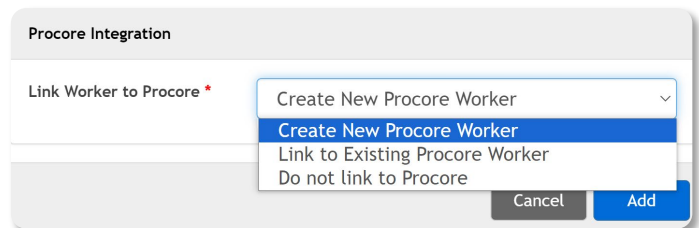## Enabling the Procore Integration

How to enable integration

9. **How to create a new worker or link to an existing worker in Procure via MSite**
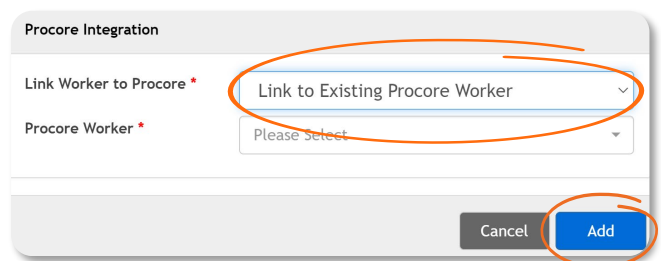

If you are creating **new worker** or **editing an existing worker**. In the **Site Association** section of the **Worker's Profile**, you can add a new site or edit and existing site. When linking a worker to Procore, ensure the site you are linking to is one that is set up and **linked** to a **project** in Procore.

If the chosen site is linked to a **Procore project**, you should see the site in the **Procore Integration** Section:

10. Selecting **Create New Procore Worker** will pass the first and last name of the worker through to **Procore**. A worker will **automatically be created** in Procore, once you have saved the worker profile in MSite.

If a worker is **already created in Procore** select the **Link to Existing Procore Worker** option. A **list** of the Procore workers already created and associated with the selected project/site will now display. Find the worker and then click **Add**.

The final option, **Do not link to Procore**, *simply means that by selecting this option,* **no worker will be created in Procore**.

11. Your worker profile will now be **integrated with Procore**.