

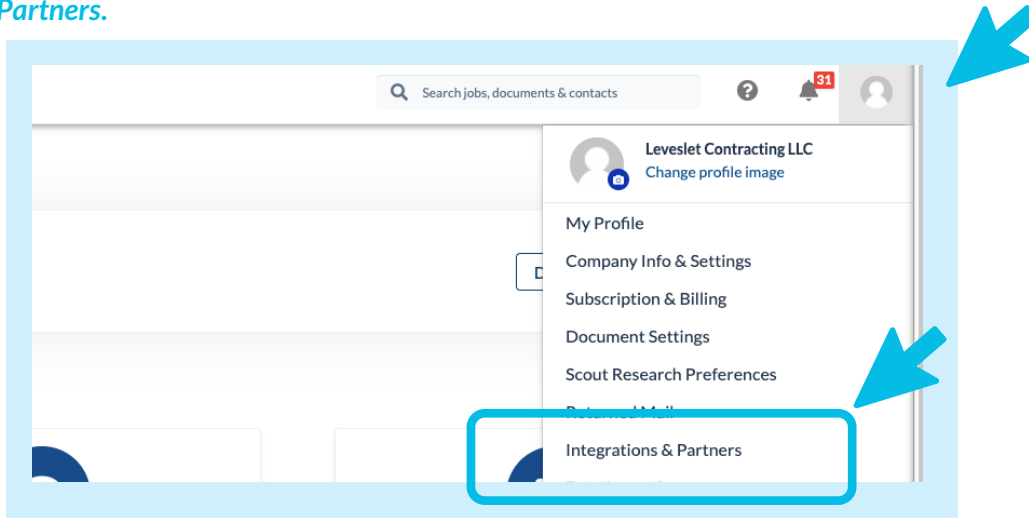
How to Sync Your Procore Account with Levelset



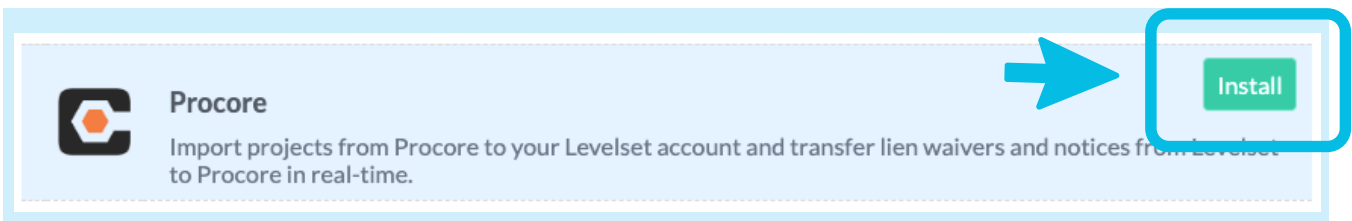
LEVELSET
Payment help is here.

Integrate Levelset with your Procore account to save time with setting up jobs in Levelset, sending documents, or automating lien waiver requests.

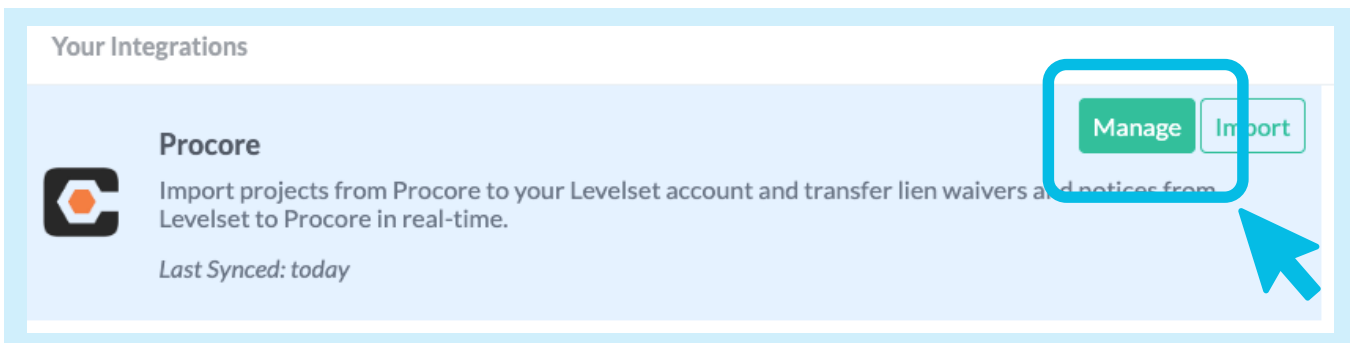
- 1** **Step One:** Click on the settings *Profile* icon at the top right corner of your dashboard, and select *Integrations & Partners*.



- 2** **Step Two:** Hover over Procore and click Install. Then log in to your Procore account and authorize sharing between accounts. Please note: The person logging in and connecting accounts should be a **Procore administrator**.



- 3** **Step Three:** Once your accounts are connected, you will be prompted to set basic preferences in Levelset (click the "Manage" button in Levelset to do this - see below).



4 Step Four: Manage Procore Settings within Levelset & Connect Procore Account

- 1 **Choose which company in Procore** you would like to sync to Levelset. You can choose only one Procore company to sync to one Levelset account.
- 2 **OPTIONAL: Select your Lien Waiver Automation Settings.** Levelset can automatically request lien waivers from your vendors when vendor requisitions in Procore are approved or payments are recorded in Procore.

We recommend not selecting any lien waiver automation until you have an understanding of the waiver triggers in Procore

- 3 Click **Connect Procore account**

1 Which company do you want to sync to Levelset?

Delaney Developers (GC) ▼

2 Lien Waiver Automation

Automatically request **conditional** lien waivers from your subcontractors/vendors based on Invoices (Requisitions) in Procore

Send lien waiver requests via Levelset

Use custom template

Nothing selected ▼

Nothing selected

Nothing selected ▼

Automatically request **unconditional** lien waivers from your subcontractors/vendors based on Payments in Procore

Send lien waiver requests via Levelset

Use custom template

Nothing selected ▼

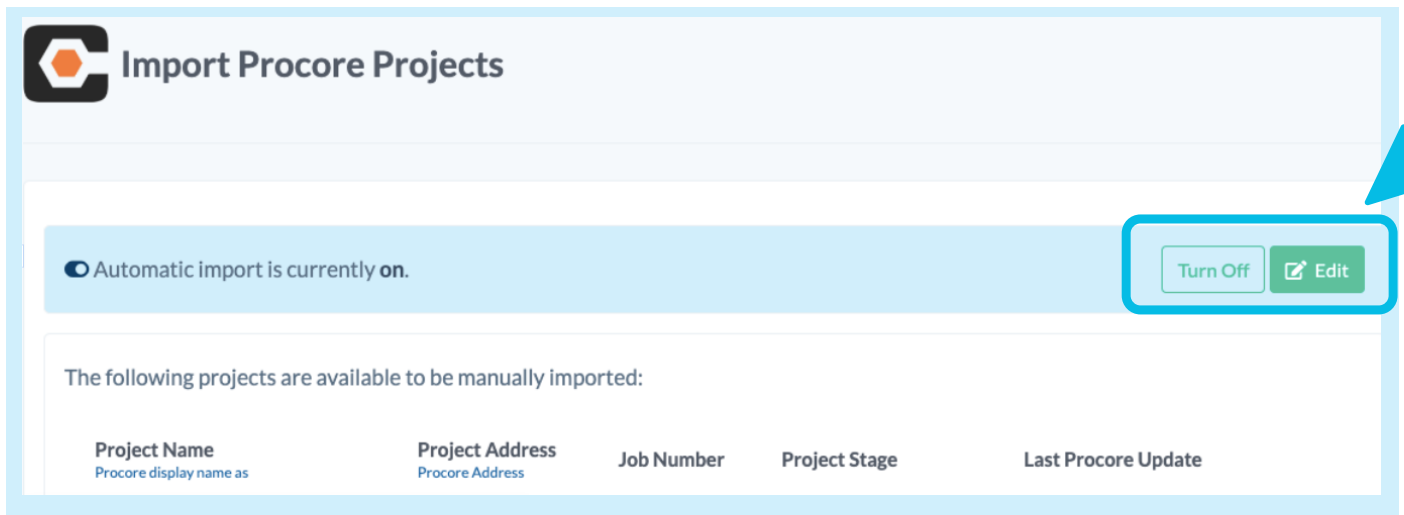
Nothing selected ▼

3 **Connect Procore Account**

Last updated on October 23rd, 2020

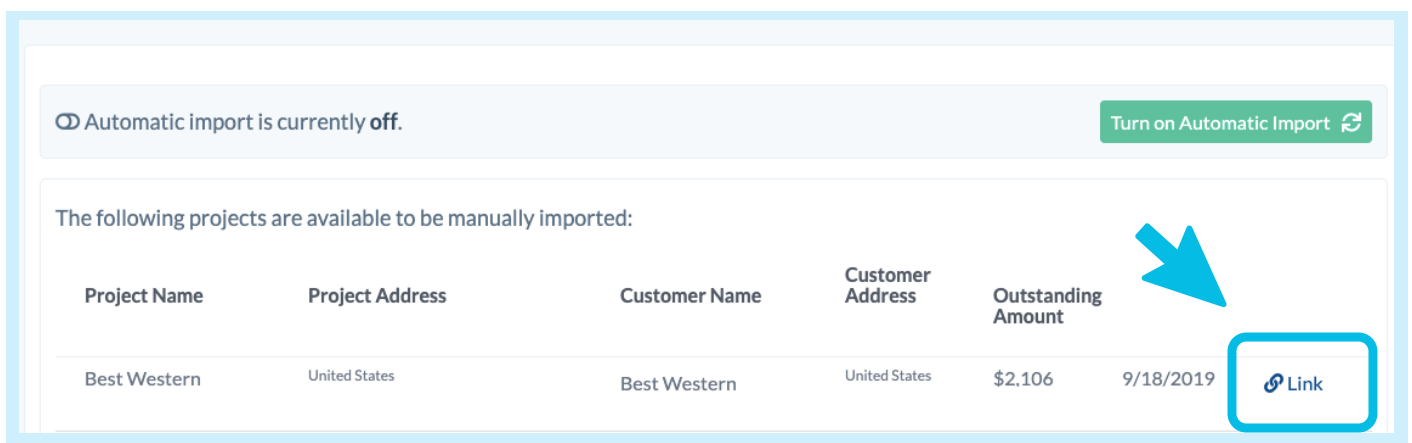
How to Sync Your Procore Account With Levelset

- 5** Step Five: Import projects from Procore. Back on the Integration and Partners settings page in Levelset, click the Procore Import button.



The screenshot shows the 'Import Procore Projects' interface. At the top left is the Procore logo and the title 'Import Procore Projects'. Below this is a light blue banner with a toggle switch set to 'on' and the text 'Automatic import is currently on.' To the right of the banner are two buttons: 'Turn Off' and 'Edit'. A blue arrow points to the 'Edit' button. Below the banner, the text reads 'The following projects are available to be manually imported:'. Underneath is a table with the following columns: 'Project Name' (with a sub-label 'Procore display name as'), 'Project Address' (with a sub-label 'Procore Address'), 'Job Number', 'Project Stage', and 'Last Procore Update'.

You can choose to Turn On Automatic Importing OR pick and choose which jobs you would like to link initially from Procore to Levelset. Click the **Link** button to sync one job at a time to Levelset.



The screenshot shows the 'Import Procore Projects' interface with automatic import turned off. At the top left is the Procore logo and the title 'Import Procore Projects'. Below this is a light blue banner with a toggle switch set to 'off' and the text 'Automatic import is currently off.' To the right of the banner is a green button labeled 'Turn on Automatic Import' with a refresh icon. Below the banner, the text reads 'The following projects are available to be manually imported:'. Underneath is a table with the following columns: 'Project Name', 'Project Address', 'Customer Name', 'Customer Address', 'Outstanding Amount', and 'Last Procore Update'. A blue arrow points to the 'Link' button in the last row of the table.

Project Name	Project Address	Customer Name	Customer Address	Outstanding Amount	Last Procore Update	
Best Western	United States	Best Western	United States	\$2,106	9/18/2019	Link

Data Sync Documentation

-
- **Procore and Levelset sync every 4 hours.** You can also force a sync on the job level at anytime (under the AR or AP tab of a specific project page).

Levelset syncs the following information from Procore:

Basic Job Info

Levelset	Procore
• Job Nick Name	Project Name
• JobAddress (Job Site Address)	Project Street Address
• Job ID	Job Number
• Customer Information	Contact Information
• Customer's Mailing Address	Contact Mailing Address

Prime Contract (All values will update in Levelset as they change in Procore)

Levelset	Procore
• Amount Due	Total Contract Amount (including change orders)
• First Furnishing Date	Start Date
• Last Furnishing Date	Date of Substantial Completion

- **Note:** In the cases where there is more than one Prime Contract on a project, Levelset will import the earliest.

Owner Invoices (will be imported to the AR tab of Levelset project)

- These are invoices between you and your client within the Prime Contract.
- Except for the invoice_status, these values will update in Levelset if they update in Procore.
- Regardless of Invoice status (Draft, Approved, etc), Levelset will import Receivable Invoices in Levelset.

Accounts Payable Invoices and Vendors (from Procore Commitments)

- Approved invoices (requisitions) that are linked to the current billing period should be imported automatically.
- Approved invoices (requisitions) that are linked to the current billing period should be updated with each payment automatically.
- These invoices will sync to the AP tab of the project in Levelset.

Payments Issued on AP Invoices

- Levelset will mark an invoice as paid when a payment is issued in Procore on an invoice that is already synced with Levelset.

Last updated August 2021