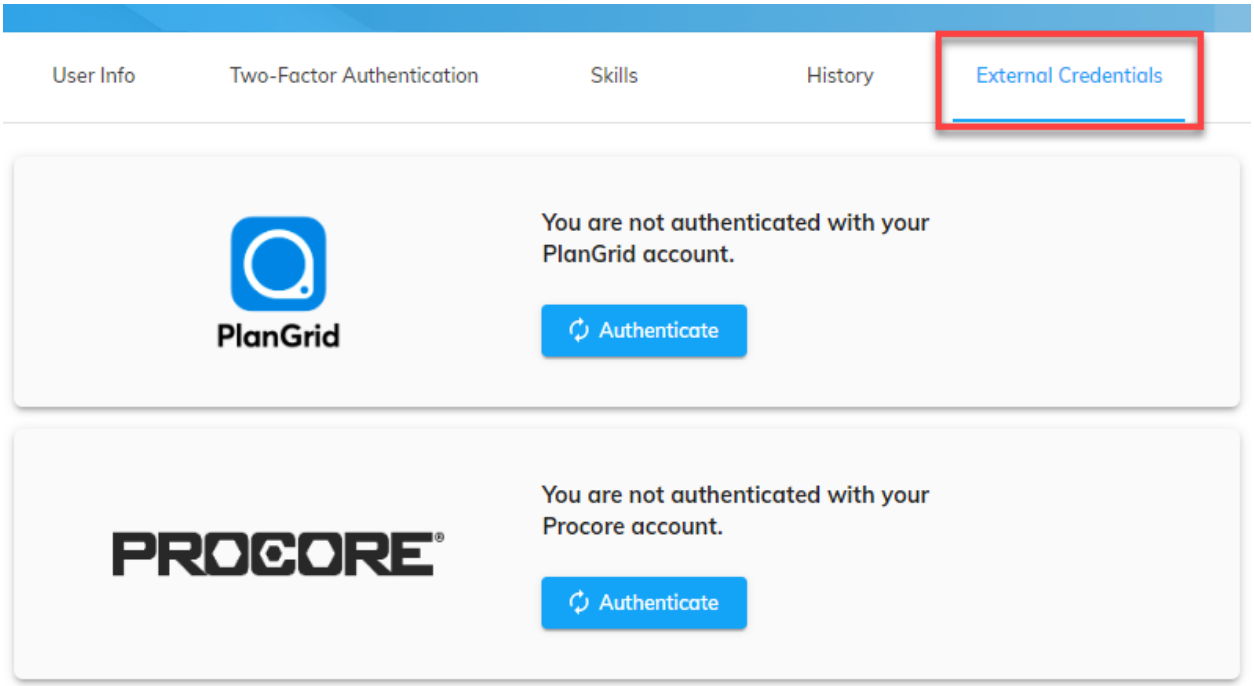
# PROJECTMATES CONNECTOR FOR PLANGRID

Projectmates is an owner-focused construction program management software with a comprehensive set of tools to manage all aspects of a project. However, we understand that many owners, architects and contractors are also utilizing PlanGrid along with Projectmates. To minimize double data entry, the PlanGrid integration will allow you to import RFIs and sheets into Projectmates.

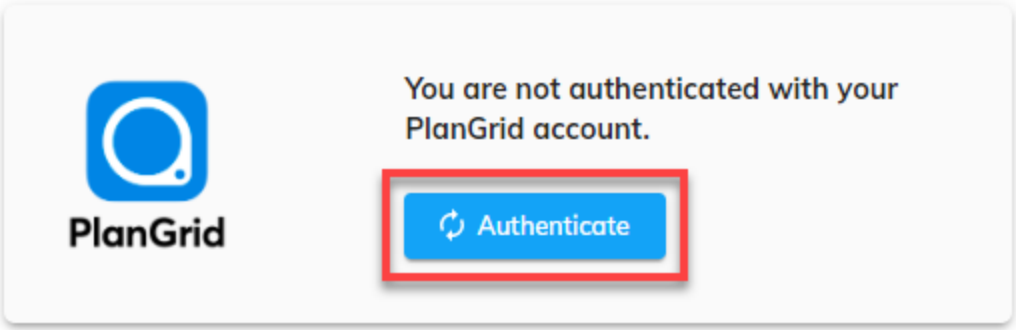
### Linking Your PlanGrid Account To Your Projectmates Account

Before you can begin importing items from PlanGrid into Projectmates, you must first link both of the accounts:

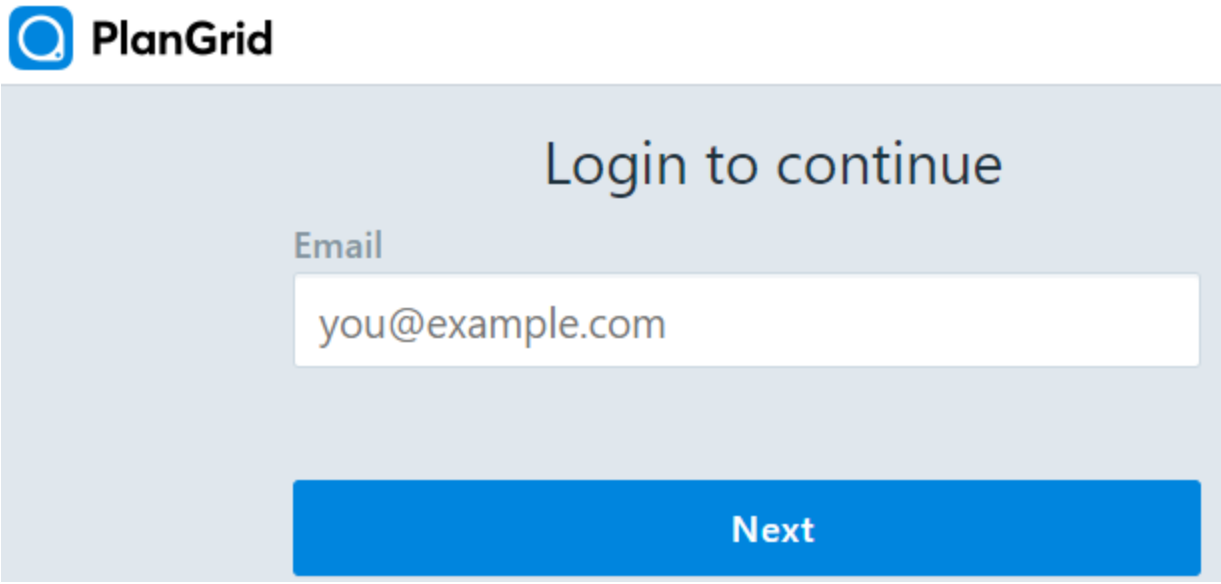
1. Access your profile. This can be done by clicking on your name in the upper right-hand corner and selecting “My Profile” (***Note:*** *Be sure and access your profile from the My Projects or My Work page. This process is not accessible from within a project)*
2. In your Edit User Profile menu, click the External Credentials Tab



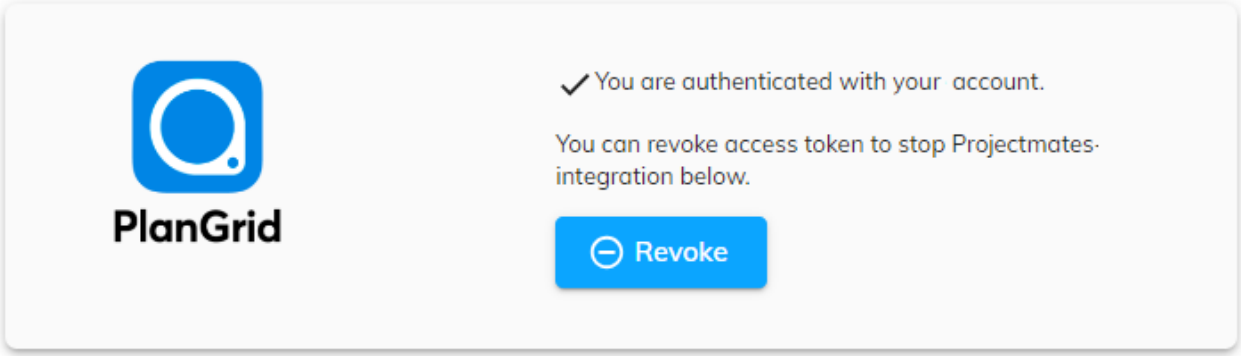

3. Click Authenticate next to the PlanGrid option




4. You will be prompted to login with your PlanGrid account. Successfully logging in will establish a link between both accounts for importing



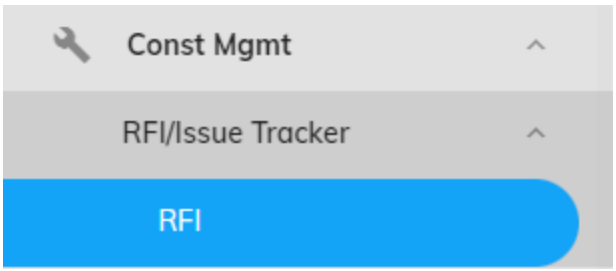

**Helpful Hint:** Once linked, Get Access Token will be joined by another one called Revoke, if you want to remove the link between your accounts.




## How To Import RFI Items From PlanGrid Into Projectmates

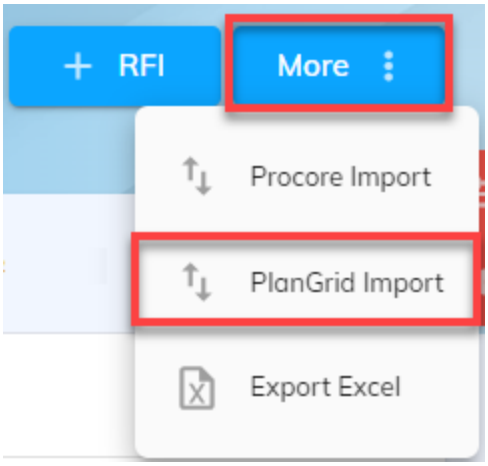
### Step 1: Log Into Projectmates

1. Drill into the project where you are working in Projectmates
2. Click on Const Mgmt. tab to access the RFI tool
3. Access the RFI instance where you want to import PlanGrid RFI items




**Step 2: Import RFI Items From PlanGrid**

1. Click on the More button located in the upper right-hand corner
2. Select the option for PlanGrid Import




3. Then select the PlanGrid project from the drop down that corresponds with the project that you are working in

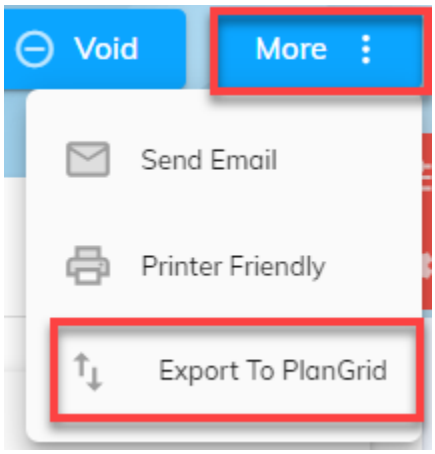
4. A list of eligible, open, RFIs will display on the log page
5. Click Import next to the RFIs that you want to import in (***Note:*** *You can import multiple RFIs at once. Imported RFIs are saved in Draft mode*)

| Number | Subject | Status | Action |
|---|---|---|---|
| 65 | RFI #55 | Open | Import |
| 64 | RFI #54 | Open | Import |
| 63 | RFI #53 | Open | Import |

6. Enter required fields and click Finalize to initiate Projectmates workflow

#### Step 3: Exporting RFIs Back To PlanGrid

1. Open the closed RFI that you want to export back to PlanGrid
2. Click on the More button in the upper right-hand corner
3. Select the Export to PlanGrid option. This will push final response data back into PlanGrid




## How To Import Sheets From PlanGrid Into Projectmates

#### Step 1: Log Into Projectmates

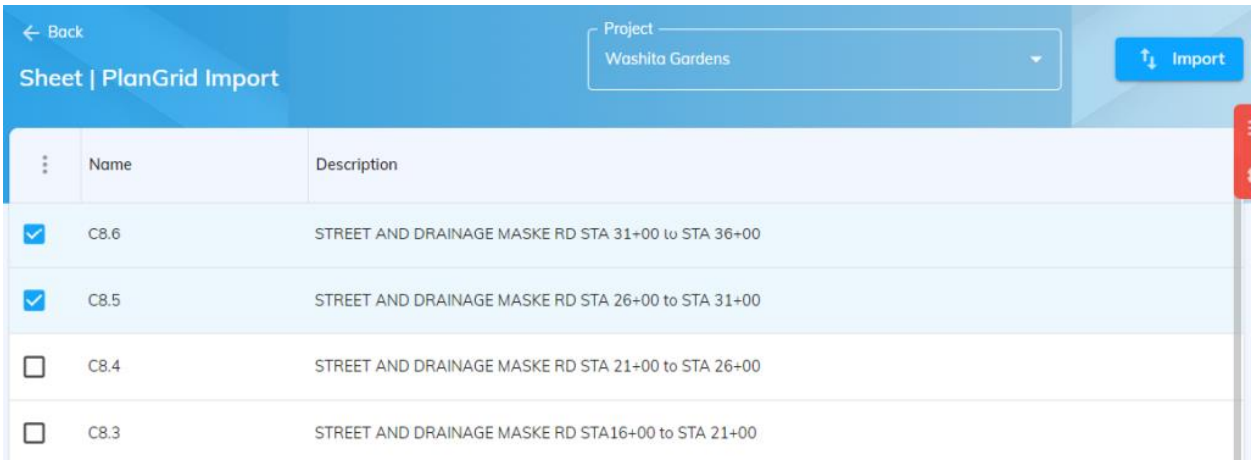
1. Drill into the project where you are working in Projectmates
2. Click on Documents tab to access the Document Manager
3. Access the document folder where you want to import PlanGrid items

**Step 2: Import Sheets From PlanGrid**

1. Click on the PlanGrid button located in the upper right-hand corner

2. Then select the PlanGrid project from the drop down that corresponds with the project that you are working in

3. A list of eligible sheets will display on the log page
4. Check the box next to the sheets that you want to import




5. When ready, click on the import button located in the upper right hand corner
6. Once imported, click on the back button to go to the folder where the sheets were imported (***Note:*** *When multiple sheets are imported at once, they will be consolidates as a singular PDF with the name PlanGridImport followed by the date)*