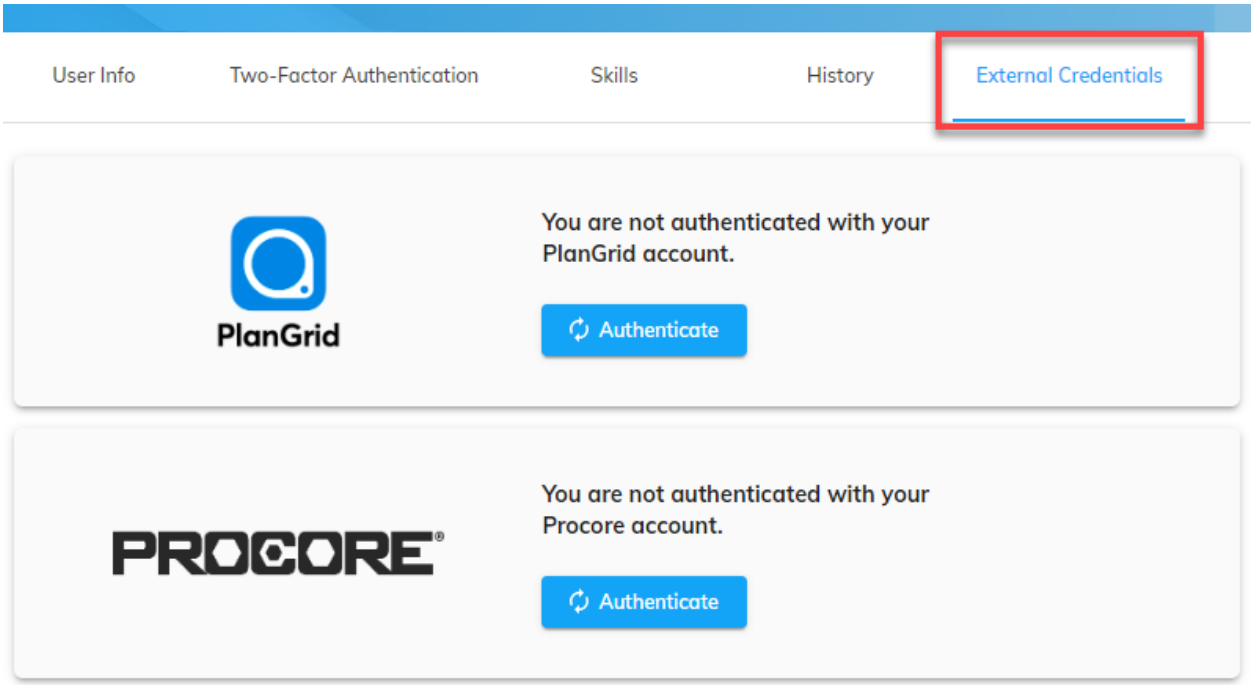
PROJECTMATES CONNECTOR FOR PROCORE

Projectmates is an owner-focused construction program management software. So how can we accommodate the Contractors who are using Procore, a contractor-focused construction software? Simple! Projectmates provides a connection to Procore to let your contractors pull RFI & Submittal information from Procore into Projectmates.

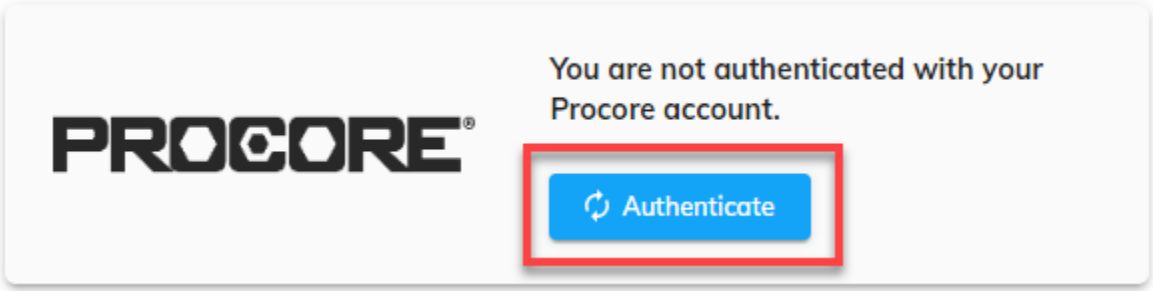
Linking Your Procore Account To Your Projectmates Account

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

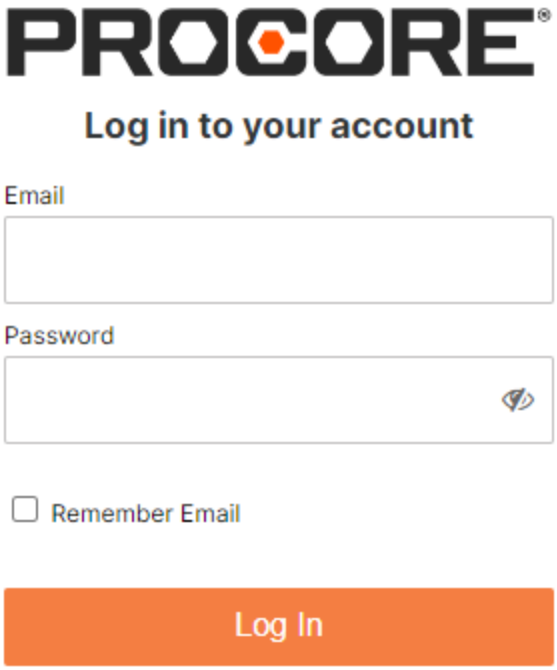
1. Access your profile. This can be done by clicking on your name in the upper right-hand corner and selecting "My Profile" (***Note:*** *Be sure and access your profile from the My Projects or My Work page. This process is not accessible from within a project).*
2. In your Edit User Profile menu, click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



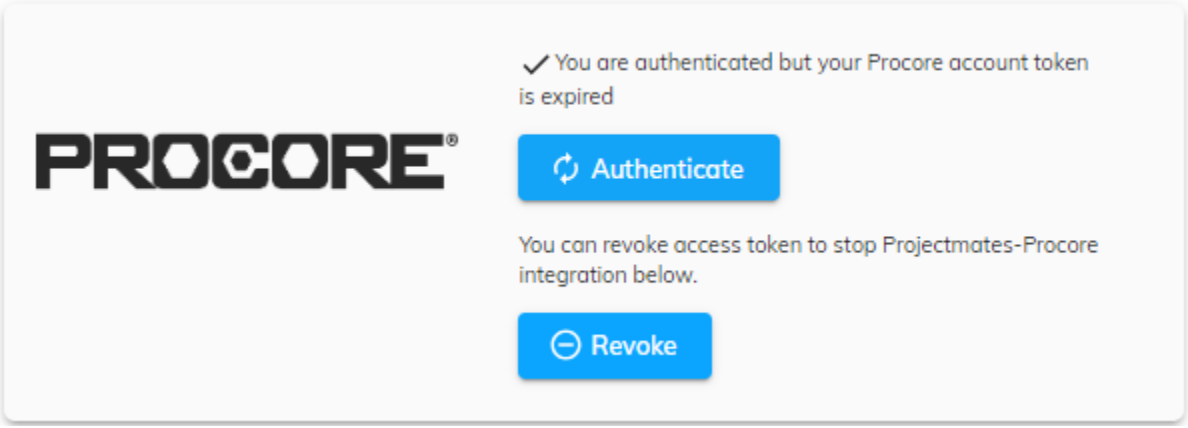
3. Click Authenticate next to the Procore option.



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



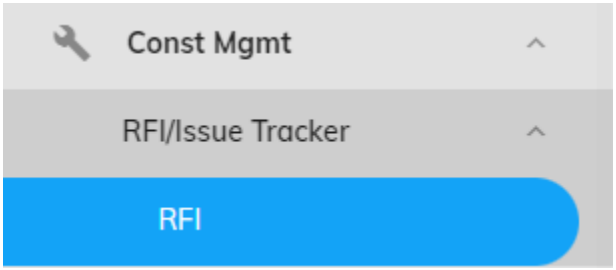
Helpful Hint: Once linked, Get Access Token will be joined by another one called Revoke, if you want to remove the link between your accounts.



How To Import RFI Items From Procore Into Projectmates

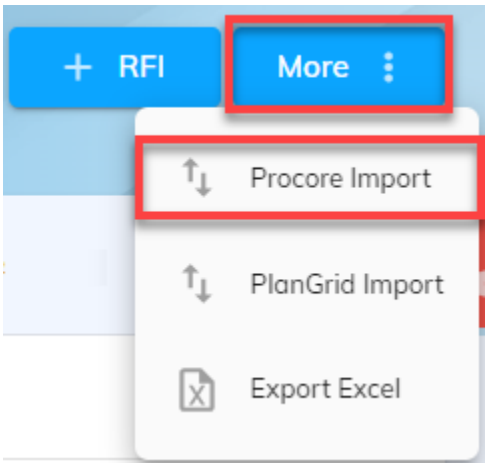
Step 1: Log Into Projectmates

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 Procore RFI items



Step 2: Import RFI Items From Procore

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



3. Select your Company from the drop down
4. Then select the Procore project from the drop down that corresponds with the project that you are working in

5. A list of eligible, open, RFIs will display on the log page
6. 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*).

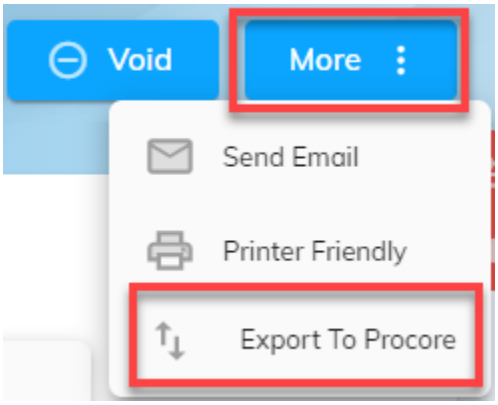
Number	Subject	Action
9	Please select the bolsters from the attached images	Import
8	Need access to demo day 1 schedule	Import
7	Bookcase Finish Clarification	Import
6	Outlets in Audio Visual Room	Import

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

Step 3: Exporting RFIs Back To Projectmates

1. Open the closed RFI that you want to export back to Procore

2. Click on the More button in the upper right-hand corner
3. Select the Export to Procore option. This will push final response data back into Procore



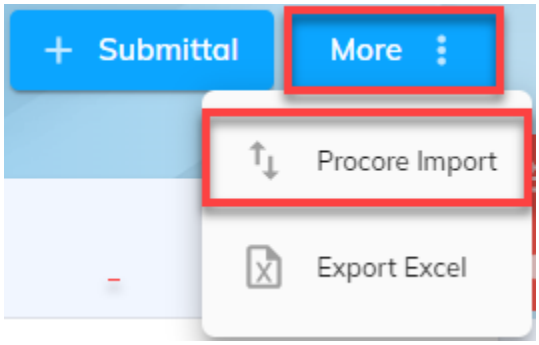
How To Import Submittal Items From Procore Into Projectmates

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 Submittal tool
3. Access the submittal instance where you want to import Procore submittal items

Step 2: Import Submittal Items From Procore

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



3. Select your Company from the drop down
4. Then select the Procore project from the drop down that corresponds with the project that you are working in

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

Number.Revision	Specification Section	Title	Type	Status	Action
1.0	01013 SUMMARY OF WORK (FF&E)	Submittal 001	Design Data	Open	Import
1.0	024119-01 Qualification Data	Submittal 002	Document	Open	Import
1.0	024119-02 Proposed Protective Measures	Submittal 003	Document	Open	Import
1.0	024119-03 Schedule of Activities	Submittal 004	Closeout Submittals	Open	Import

7. Fill out any additional fields in Projectmates and finalize to initiate Projectmates workflow

Note: *Finalized submittal data cannot be exported back to Procore the same way that finalized RFI data can.*