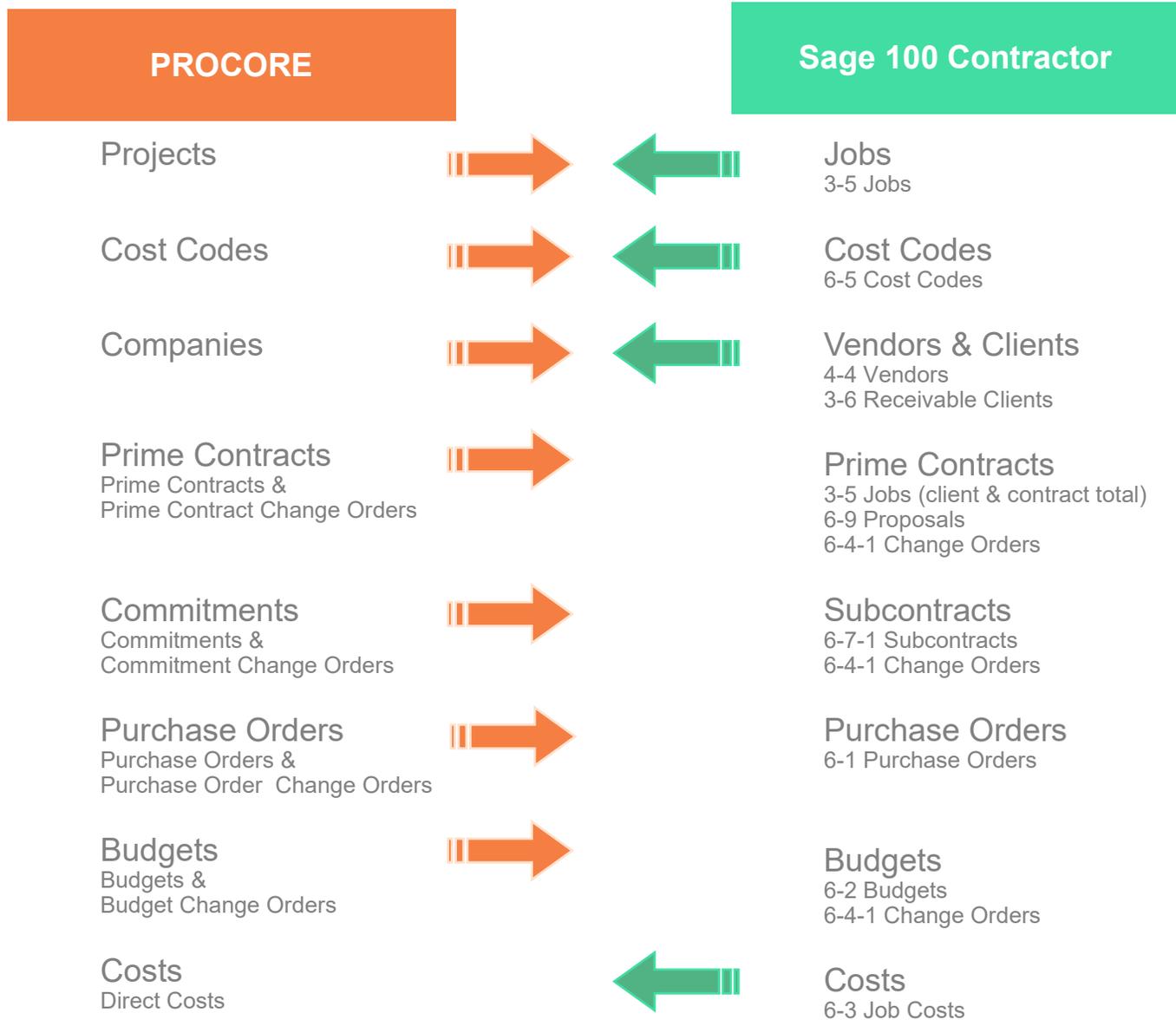


Overview

Keep your Procore and Sage 100 Contractor data in sync.

- Reduce human error by eliminating manual and redundant data entry between Procore and Sage 100 Contractor
- Eliminate human intervention and schedule synchronizations to be run automatically at timed intervals
- Process synchronization on demand for immediate efficient communication between Accounting and Project Management personnel
- Save time and money by reducing overhead, reducing clerical errors and providing more timely access to information across the company



For more information:

Email: sales@eidynamics.com

Phone: (208) 629-0770





Supported Sage 100 Contractor Versions

- Sage version 20.5 and newer (SQL Version)

System Requirements

The Sage Connector is an on premise solution that is typically installed on the same server where Sage 100 is installed. The Sage Connector is developed on top of the Ei Dynamics BPM platform. Ei Dynamics is a business process management and workflow solution. A limited licensed copy of Ei Dynamics is included with the Sage Connector. (<http://www.eiDynamics.com>)

- Windows Server 2012 R2 or higher
- Minimum of 16GB of RAM on the server
- Minimum of 2 processors
- SQL Server 2008 or higher (the Sage Connector requires it's own SQL Database)
- IIS7 or greater
- .NET 4.5.2

Procore Permissions: a Procore user login with administrative rights is required

Procore Product Lines Supported: Construction Financials

Rules & Constraints

- **Cost Codes:** In order to “auto” synchronize Cost Codes, Procore must use a 2 tier cost code and both tiers combined must be an integer. The combination of the first and second tier should match the Sage Cost Code integer before the decimal exactly. (Manual cost code mapping is available for customers that prefer to use a different cost code numbering structure in both Procore and Sage or where the existing structures are too different to conform to our coding rules)
- **Project Numbers:** the project number field in Procore must match the Sage project number which is a long integer. The project number can be assigned in Procore or generated automatically when initially synchronized.
- **Costs:** in order to send costs from Sage to Procore, the Direct Cost tool option must be activated for each job in Procore. Activating this feature prevents costs from being entered at the budget level in Procore.
- **Sub-Jobs/Phases:** sub-jobs or phases as they are referred to in Sage are not currently supported.
- **Multiple Sage Companies:** The connector is designed to synchronize one Sage Company database with one Procore Company.

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PROCORE®



Data Sync

sage 100 Contractor

Implementation Process

As part of the cost of purchasing the Sage Connector, a certified Ei Dynamics implementation specialist will be assigned to your account. Your assigned implementation specialist will guide you through the entire implementation and will be your direct contact through the duration of the implementation. The implementation specialist will install and configure the software in your environment and guide you through all of the steps required to get up and running with the software.

The process generally takes 2-3 weeks and consists of the following steps...

- Install and configure software
- Download and stage Procore data locally into the Sage Connector database
- Customer to make decisions on system settings and what integration points they will enable and which direction certain integration points will be directed towards
- Implementation specialist will prepare data mapping tables (these are lists of vendors, customers, projects and cost codes for both Sage 100 and Procore)
- Customer will map existing data between Procore and Sage using the mapping tables provided by the implementation specialist
- Implementation specialist will synchronize the mapped data (this is a one time exercise)
- Implementation specialist will train customer how to access the software and run manual synchronizations
- Once the customer is comfortable that data is synchronizing properly when run manually they will have the option to turn on the Live Automatic Synchronization process.
- Go Live!
- Customer Sign Off

Once a customer has signed-off on their implementation, any future support needs or questions will be handled and directed to Ei Dynamics general support services during normal business hours of 8:00 am—5:00 pm PST (Monday through Friday)

Email: support@eidynamics.com
Phone: 208-629-0770 ext. 803

For more information:

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Phone: (208) 629-0770

