

### **eCMS Connect for Procore**

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### Contents

Ov	erv	view
I.	F	Procore Setup
II.	e	eCMS Setup6
-	L.	A Host entry and certificate
	2.	Setup Instance
	3.	Setup Notification
4	1.	Portfolio Mapping10
ŗ	5.	Setup Groups13
(	5.	Scheduler Setup
III.		eCMS > Procore Processing17
-	L.	PM Integration
2	2.	Vendors – eCMS > Procore
	3.	Vendor Ins – eCMS > Procore
2	1.	Projects – eCMS > Procore25
ŗ	5.	Cost Codes – eCMS > Procore27
(	5.	Cost Types – eCMS > Procore
-	7.	Budgets – eCMS > Procore
8	3.	Actuals – eCMS > Procore
IV.		Procore > eCMS Integration
	L.	Subcontracts – Procore > eCMS
2	2.	Change Orders – Procore > eCMS41
	3.	Budget Update – Procore > eCMS49
2	1.	Purchase Orders – Procore > eCMS

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# Overview

### eCMS

A comprehensive suite of software applications that helps any size and type of commercial contractor manage all aspects of their financials and operations. Therefore, our construction management software applications address all elements of business processes. From cost accounting, payroll, reporting to project-wide communication, content management, eCMS manages your projects from start to finish.

## Procore

A leading provider of cloud based applications for construction. Procore connects people, applications and devices through a unified platform to help construction professionals manage risk and build quality projects safely, on time and within budget. Procore has a diversified business model with products for Production Management, Construction Financials, Quality & Safety and Field Productivity.

This document will outline the setup and processing steps for a successful eCMS, Procore – Construction Financials integration.

This is a list of points of integration that will be cover.

- Vendors eCMS > Procore
- Vendor Ins eCMS > Procore
- Projects eCMS > Procore
- Cost Codes eCMS > Procore
- Cost Types eCMS > Procore
- Budgets eCMS > Procore

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- Actuals eCMS > Procore
- Subcontracts Procore > eCMS
- Change Orders Procore > eCMS
- Budget Update Procore > eCMS
- Purchase Orders Procore > eCMS

Procore PM Application	Data Export From Procore to eCMS	Data Import From eCMS to Procore	Computer Guidance eCMS ERP
Projects Cost Codes Cost Types		<b>&lt;&lt;</b> <<	Jobs Cost Codes Cost Types
Subjobs		<<<<	Subjobs
Companies		<<<<	AP Vendors
Company Insurance		<<<<	Vendor Insurance
Budgets	>>>>	<<<<	Budgets
Commitments Subconstracts POs & CCOs	>>>>		Commitments Subconstracts POs & CCOs
Costs Committed /Actual JTD & MTD		<b>&lt;&lt;</b> <<	Costs Committed /Actual JTD & MTD

>>>> Update Only





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### **Procore Setup**

- 1. Sign up using your Procore link, <u>https://api.procore.com/</u>
- 2. <u>https://developers.procore.com/documentation/making-first-call</u> covers instructions on making the first call to production.

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## I. eCMS Setup

1. A Host entry and certificate

A Host entry (10.X.X.XXX) and certificate will need to be added on the WebSphere. This task will need to be performed by internal or CGC IT staff.

eCMS Connect



Admin > Application Installation > eCMS Connect Setup

2. Setup Instance

This is where you will need the information from Procore Mentioned earlier.

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SMARTER CONSTRUCTION. eCMS CLOUD-BASED CONSTRUCTION ERP SOFTWARE.

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Actio	on	In	stance N	ame 🔺		Applica	ation Name •			UR	L +									User	d e								En	nail Sender	•			Notific	cation +	
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#### Add

C Service Accounts • Rich Procore × +		- D 🗙
← → C	0/company/admin/service_accounts/6481	☆ 🚯 :
RICH PROCORE Select a Project	Admin FAVORITES	₩ ? 🌲 RB
Service Accounts > ecms-procore-rich-procore		
Service Account		
ECMS-PROCORE-RICH-PROCORE		Edit Delete
Client ID	b680979acfc62aaf0b1354a17939a2c90b4b5d55c74bbebdf70ce216a0e54577	
Client Secret	f5255fad34845b6799cd06afc33f18754c46defc7211e31n8751ndd539c834fe	
	Setup Instance	
Instance Name	Procore	
Application Name	Procore 💌	
URL	https://sandbox.procore.com	
	Example - http:///server_name}	
User Id	f0b1354a17939a2c90b4b5d55c74bbebdf70ce216a0e54577	
Deserves		
Password		
Email Sender	rbrown@computerguidance.com ×	
Enable Notification		
	Cancel Save	
Sandbox Account BETA		
CLIENT ID 😧	CLIENT SECRET	
40d09e226d0cf5e3e549ab51a	bd41468d0b4c600d079796fe3ac726277caa66e	
SANDBOX URL		
https://sandbox.procore.com/	13600/company/home	
_		

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Use the Procore URL to include up to .com. Setup Instance: Instance Name – User Defined Application Name: System Defined, must choose Procore URL: Information obtained from Procore User ID: Information obtained from Procore Password: Information obtained from Procore Email Sender: User defined. Enable Notification: User defined.

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3. Setup Notification

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AIP A	VR Admin	Archival ADP	BoM	Comdata	Copy Co	Eq Acct	Eq Maint	ECM	Forms	G/L I	H/R I	H/R-E	Imports	Inquiry	J/C	Ord Proc	P/C	P/C-2	P/O	P/S	Prop Mgm	PR	I+I PR-C	Rep Const	REQ	Servio	e T&M	User Menu
																												7
Application Insta	illation											Setup	Notificati	ion													webserv	enotifications
Setup Instance	Field Mapping	Setup Notification	Portfo	lio Maps	Setup Gro	ups S	cheduler	Lo	gs I	Manage Scl	heduler	Viewpoin	t Setup															Initial Load
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					Ema	il Port Numb	per			25																		
					Aut	norization Re	quired																					
					Dom	ain///User Id																						
					Pase	sword																						
					TTL	S Required																						

This will need to be setup by your internal or CGC IT staff.

4. Portfolio Mapping

Will map the eCMS Companies to include in the Procore Integration

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Appli	ation Ir	nstallatio	in												Setup	Portfolio I	Maps													webser	viceportfolio	s
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		×	Com	lata					Comdata					Co	mdata					<ul> <li>03/02</li> <li>03/01</li> <li>12/01</li> <li>12/01</li> <li>12/01</li> <li>12/01</li> <li>12/01</li> </ul>	23 Q/ 00 Cc 00 Mi 06 CC 08 Mi 12 Mi	A Fut410 imputer G ni & Cons 2 Compar ni Compa ni Constri	uidance S truction 4 y Division ny iction	tupport 1 16								
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Add

	Setup Portfolio Maps	
Application - Instance Name	Procore - Procore	
Portfolio Name	Procore	
Company	Available Companies       Selected Companies         00/001       CGC Construction Corp       Image: Company 1 div 001       Image: Company 1 div 002       Image: Company 1 div 002 <th></th>	

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Setup Portfolio Maps:

Application – Instance Name: System Generated, must choose Procore – Procore.

Portfolio Name: User Defined.

Company: User Defined from Available Companies list.

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5. Setup Groups

The Group Setup is required for the Scheduler Setup

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2	K e	CMS			Web2 C	ontact Im	port		Web2	Org Import					rbre	wn@compu	terguidance	com						/too	ls/import/	process.asp	px?b=ec	cms&t=org,c	ont			്	
2	K e	CMS			JC Dictio	onary			Job C	ost Dictionary					rbri	wn@compu	terguidance	com						499								്	
2	K e	CMS			PMWeb	Budget			Budge	t - PMWeb to	eCMS																					്	
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	K e	CMS			PMWeb	S/C C/O			Subco	ntract Change	Orders -	PMWeb to e	CMS																			<b>3</b>	
	K e	CMS			QA410				Job C	ost Dictionary					mg	atchell@com	puterguidan	ce.com						446								3	

A Group will be setup for each of the integration points

- Vendors eCMS > Procore
- Vendor Ins eCMS > Procore
- Projects eCMS > Procore
- Cost Codes eCMS > Procore
- Cost Types eCMS > Procore
- Budgets eCMS > Procore
- Actuals eCMS > Procore
- Subcontracts Procore > eCMS
- Change Orders Procore > eCMS
- Budget Update Procore > eCMS
- Purchase Orders Procore > eCMS

#### Add

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																												7
Application Instal	ation											Set	up Group B	dit													webservi	cegroups_edit
Setup Instance	Field Mapping	Setup Notification	n Port	folio Maps	Setup Grou	abe :	Scheduler	L	igs	Manage S	Scheduler	Viewp	oint Setup															Initial Load
					Grot Port Avai Ema	ip Name folio Name lable Servii il Recipient	ces I(s)		Create Ni Procore - Vi Procore [ /endor - eC brown@co	aw Group- andors SMS to Pro mouterauit	icore tance con	N separate	ed by comm	a(.) or semice	lon(;)													

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Setup Group Edit:

- Croup Name: Select Create New Group from drop down, Enter user defined Group Name
- Portfolio Name: Must choose Procore.
- Available Service: Select choice from the Available Services drop down.
- Email Recipients: User defined.
- Repeat the process for all the Available Services.

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																															?	
Applic	ation In	nstallatic	on												5	Setup Group	<b>,</b>													webs	ervicegroup	s
Setup	o Instanc	ce F	ield Mapping	Setup	Notification	Portfol	lio Maps	Setup Group	16	Scheduler	L	ogs	Manage	Schedule	r Viewp	oint Setup															Initial Load	
A	ction	Pr	ocore	Portfolio N	lame 🕶			Gro	oup Name	•	_			W	ebservice	Name •					Em	ail Recip	ient(s) •				Webservice UR	L e		Send Te	ist Mail	٦
ā	×	Pro	icore				Procore	- Projects				Project - eC	MS to Pr	ocore					rbrown	@compu	terguidand	e.com								S	9	
Z	X	Pro	icore				Procore	- Actual Costs				Actual Cost	- eCMS f	o Procore					rbrown	@compu	terguidano	e.com									9	
ä	×	Pro	icore				Procore	- Budget				Budget - eC	MS to Pr	ocore					rbrown	@compu	terguidano	e.com									5	
2	X	Pro	icore				Procore	- Cost Code				Cost Code	eCMS to	Procore					rbrown	@compu	terguidano	e.com									5	
2	X	Pro	core				Procore	- Cost Type				Cost Type	eCMS to	Procore					rbrown	@compu	terguidano	e.com									3	
2	X	Pro	core				Procore	- Vendors				/endor - e0	MS to Pr	ocore					rbrown	@compu	terguidano	e.com									<b>D</b>	
2	X	Pro	core				Procore	- Vendor Ins				/endor Insi	rances -	eCMS to	Procore				rbrown	@compu	terguidano	e.com									3	
2	X	Pro	core				Procore	- Subcontract			1	Subcontrac	t - Procor	e to eCM:	S				rbrown	@compu	terguidano	e.com									5	
6	X	Pro	core				Procore	- Purchase Or	ders		1	Purchase C	rder - Pro	ocore to e	CMS																3	
Z	X 8	Pro	icore				Procore	- Change Orde	ərs			Change Or	der - Proc	ore to eC	MS																9	
ä	X	Pro	icore				Procore	- Budget Upda	te			Budget - Pr	ocore to e	CMS																	5	

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6. Scheduler Setup

Allows the user to schedule when and how often the integration will run.

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																													(	?
Application Install	lation										Set	tup Schedu	ile															webse	ervicesched	iule
Setup Instance	Field Mapping	Setup Notification	Portfolio Ma	ps Setup	Groups	Scheduler	L	ogs	Manage	Schedule	r Viewpo	oint Setup																1	nitial Load	
	Port	folio Name 🔺		Scheduler Gro			Start Time	(hrs) a		End T	(ime (hrs)		Recu	rrina Inte	rval 🔺				-			Day	of the Mor	nth a		eneat In	terval (min	1.0		
Action								(, .				·				Mon	Tue	Wed	Thu F	Fri Sat	Sun								Active a	
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💿 🔊 🖉 🎽	ecms		A/P Cash Dis	bursements Pa	ment						:00			Daily													1		N	
💽 🔊 🔊 🌶	ecms		FTP EFS				5				5:00			Daily													480		N	1
💽 🔊 🔊 🌶	ecms		HCSS Tmp I	np			5				5:00			Daily													15		N	
💌 🖻 🖓 🌶	ecms		JC Dictionary				5				5:00			Daily													1439		N	
💌 🖻 📓 🌶	eCMS		Job Dictionar	/			5				5:00			Daily													1439		N	

#### Add

NUL USED	Ddily
	Setup Schedule
Available Group	Procore - Vendors
Recurring Interval	Daily 🔽
Start Type	Single Start
Single Start Time	Hour     Minute       0     00       Optional:     Starts/hour       Start Every     00       0     Minutes       0     Minutes
Active	
Ca	ancel Save

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Setup Schedule:

- Available Group: The Groups setup for Procore are available for selection from a drop down.
- Recurring Interval: User defined from a drop down menu.
- Start Type: User defined from a drop down menu.
- Active: User defined.
- Repeat the process for all the integration Points

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																																		7
Applic	ation In	stallatio	n												Se	tup Sche	dule															websen	vicesche	dule
Setup	Instance	e Fi	ield Mappin;	Setup N	lotification	Ports	folio Maps	Setup Grou	ps S	cheduler	Loj	gs	Manage S	Scheduler	Viewp	oint Setup																	Initial Lo	ad
	Action	n	procore	Portfolio Nar	ne 🕶	×	Schedu	ler Group \$		Start Tin	ne (hrs) 🛊		E	nd Time	(hrs) 🕈		Recu	irring Interv	il •	Mon	Tue	Wed TI	u Fri	Sat	Sun [	Da	y of the Ma	nth 🕈		Repeat I	nterval (mi	15) \$	Activ	e •
	<i>b</i> 2	<b>X</b>	Procore			Pro	core - Actual	Costs		nu	I:null			Not Us	sed			Daily													0		N	
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	ß	a 🗙	Procore			Pro	core - Cost C	ode		0	:00			Not Us	sed			Daily													0		N	
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		a 🗙	Procore			Pro	core - Subcor	tract		0	:00			Not Us	sed			Daily													0		N	
		a 🗙	Procore			Pro	core - Purcha	se Orders		0	:00			Not Us	sed			Daily													0		N	
	6	x 6	Procore			Pro	core - Change	e Orders		0	:00			Not Us	sed			Daily													0		N	
	6	i 🗙	Procore			Pro	core - Budget	Update		0	:00			Not Us	sed			Daily													0		N	

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## II. eCMS > Procore Processing

#### 1. PM Integration

Once a job has been setup in eCMS it must have a PM Integration mapping completed before it will be able to be available for the Procore Integration.



JC > Maintenance > PM Integration



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Add

Map Port	tfolio Job
Company Number: Division Number:	31 0 <
Cancel	Next

Select Company where the Job resides.

Next

	Map Po	rtfolio Job	
Company Number:	31	Portfolio Name:	Procore
Division Number:	0		
Job Number:	PROCOR		
Sub Job Number:	002 <		
	Cancel	Ok	

Select Job for Portfolio mapping.

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#### Vendors – eCMS > Procore

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A	111	ACME	Acme Escavating Company	123 Ash St		Addison	IL	61555	N	31	0	^
A	222	BUILD	Building Supply	123 Broadway		Bakersfield	CA	95555	N	31	0	
A	333	CHAPMAN	Chapman Const Co	123 Canal St		Canton	NJ	155555	N	31	0	
A	444	GIGGERS	Diggers Escavating	123 Dunning Dr		Dublin	AZ	85555	N	31	0	
A	555	EVEREST	Everest Const Co	123 Evans St		Elmhurst	IL	61555	N	31	0	
A	666	Fedelity F	Fedelity Foundations	123 First Ave		Freemont	FL	155555	Ν	31	0	
A	777	Great Wall	Great Wall	123 Green St		Gainsville	GA	17777	N	31	0	
A	999	INVERN	Inverness Const Co	123 Irving Park Rd		Inverness	IL	65555	Ν	31	0	
A	1000	JONSHAUL	Jon's Hauling	123 Jackson St		Jamestown	TN	45555	N	31	0	
A	1100	KATCON	Kay Construction	123 Kostner St		Kostner	KS	65555	Ν	31	0	

#### Admin > Application Installation > eCMS Connect Setup

#### Scheduler

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Before running the Ad Hoc Jon for the Vendors, you should always run the Initial Load. This process will add any ne vendors to the integration file.

Info Messages	×
Initial load completed successfully.	

Now run the Ad Hoc Jon for the Vendors

#### Logs

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**Procore Validation** 

#### **Company Tools**

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#### Directory

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#### Companies

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	Edit	血	Building Supply External ID: 31/0/222	4805550003 (business) 4805550004 (business fax)	123 Broadway Bakersfield, CA 95555 US	IMPORT COMPANIES
	Edit		Chapman Const Co External ID: 31/0/333	4805550005 (business) 4805550006 (business fax)	123 Canal St Canton, NJ 155555 US	Download Existing Vendors for Import Send Completed Template
	Edit		Diggers Escavating External ID: 31/0/444	4805550007 (business) 4805550008 (business fax)	123 Dunning Dr Dublin, AZ 85555 US	
	Edit	血	Everest Const Co External ID: 31/0/555	4805550009 (business) 4805550010 (business fax)	123 Evans St Elmhurst, IL 61555 US	
	Edit	血	Fedelity Foundations External ID: 31/0/666		123 First Ave Freemont, FL 155555 US	
	Edit	血	Great Wall External ID: 31/0/777		123 Green St Galnsville, GA 17777 US	

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#### 2. Vendor Ins – eCMS > Procore

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Admin > Application Installation > eCMS Connect Setup

#### Scheduler

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#### Run Ad Hoc Job

#### Logs

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#### **Procore Validation**

#### **Company Tools**

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#### Directory

#### Companies

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	Edit	血	Architect TEST Company				IMPORT COMPANIES
	Edit		Building Supply External ID: 31/0/222	4805550003 (business) 4805550004 (business fax)	123 Broadway Bakersfield, CA 95555 US		Download Existing Vendors for Import Send Completed Template

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SMARTER CONSTRUCTION. COMS CLOUD-BASED CONSTRUCTION ERP SOFTWARE.

#### Edit

Vendors + Rich Procore FUT × +     ← → C	3670/company/directory/vend	ors/104585/edit			- 0 ×
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DBA:		Ø			
Address:	123 Broadway		Business Fax:	4805550004	
City:	Bakersfield		Email Address:		
Country/State:	United States	▼ California ▼	Website:		
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#### Insurance

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#### 3. Projects – eCMS > Procore

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#### Admin > Application Installation > eCMS Connect Setup

#### Scheduler

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#### Logs

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Setu	p Instan	ce	Field Mapping	g Setup M	Votification	n Port	folio Maps	Setup Grou	ups :	Scheduler	L	igs	Manage	Scheduk	er Viewp	oint Setup															Initial Load	
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#### **Procore Validation**

#### Select a Project

Home • PROCOR/002	× +					-	a ×
← → C 🗎 https:/	/sandbox.procore.com/7747/project/home					☆ 0	<b>R</b> :
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MY OPEN ITEMS							
	Item Type Details		Status		Due Date		- 1
		No Open It	ems				

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#### 4. Cost Codes – eCMS > Procore

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Cost Distribution		СТ	UM	PCT CMP	Current Budge	t	Proposed	l Budget	В	udget Ho	ours	Actual	Costs	Actua	l Hours	Cor	nmit Cos	ts	1	Estimate	ed At Complet	on	C	ver/Under B	3udget
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#### Admin > Application Installation > eCMS Connect Setup

#### Scheduler

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#### Run Ad Hoc Job

Logs

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	×	Proco	re - Cost Cod	•		Cost	Code - eCMS	to Procore				01/27/20	019 11:11	:09 AM	Al	нос		EF	RORS		32			24			В	1	2		

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#### Procore validation

C Admin • PROCOR/002 × +		- 0 ×
← → C ▲ https://sandbox.procore.com/7747/project/admin/cost_codes		☆ ♀   🖪 🗄
PROCORE     Rich Procore FUT     PROCOR/002 - PROCOR     Project Tools     Admin     Admin	ltes	🕂 🕄 🌲 RB
ADMIN		Export   PROJECT SETTINGS
The cost code list on the left shows the master set of cost codes for 'Rich Procore FUT. The list on the right show To add cost codes to 'PROCOR/002', either select them from your company list, and click 'Copy Codes', or create	vs cost codes assigned to 'PROCOR/002'. e a project-specific code in your list on the right.	General Active Tools Cost Codes
You can edit the descriptions of cost codes that are copied from the master set, but you cannot edit the code itse	II: Project specific codes are designated in blue and fully editable. Project Cost Codes	Locations Equipment Webhooks
전 Copy All Codes 관 Copy Selected Codes	+ Add Code + Add Division 🕼 Edit 🗟 Delete	Unit Quantity Based Budget
E 📾 Standard Cost Code List	Imp         PROCENIZ2           Imp	TOOL CONFIGURATION Home Emails Bidding Punch List Documents

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#### 5. Cost Types – eCMS > Procore

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Subcontract	Contracts	Approved C	O Pe	nding C/O	Purchase C	Irders Hou	s Summary																		
Job Number:	PROCO	R	Procore 0	002		Cus	tomer #:			22	222						Star	t Date:		00	0/00/0000				
Sub Job:	002					Cus	tomer Name	:		Be	erkshire						End	date:		99	9/99/9999				
Status:	OPEN																								
	Curre	nt Budget		Proposed B	Budget	Budge	t Hours	Actu	al Cost		Actual Ho	ours		Open Comn	nitted		Total Co	mmitted		Remain	ing	Est @	Compl	Over	/Under
INCOME																									
Burden		25,000			25,000															25,	000		25,000		
Equipmen		600,000		6	00,000															600,	000	6	500,000		
LABOR		300,000		3	00,000															300,	000	3	300,000		
Material		900,000		9	00,000				15,000					45	0,000			465,000		435,	000	ç	900,000		
Overhead		1,500,000		1,5	00,000															1,500,	000	1,5	500,000		
Rentals		600,000		6	00,000															600,	000	6	500,000		
Subcontr	1,200,000				00,000									5	0,000			50,000		1,150,	000	1,2	200,000		
Totals	5,125,000				25,000		0		15,000			0		50	0,000			515,000		4,610,	000	5,1	125,000		0
Grs Pft	-5,125,000				25,000				15,000											-5,110,	000	-5,1	125,000		
Profit %		0			0				0												0		0		

Admin > Application Installation > eCMS Connect Setup

#### Scheduler

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Applicat	ion Insta	allation													Set	tup Sche	dule															webser	vicesche	3dule
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Run Ad Hoc Job

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Logs

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Set	p Instand	Installation nce Field Mapping Setup Notification Portfolio Maps Setup Groups S									Lo	gş	Manage :	Schedule	r Viewp	pint Setup															Initial Load	
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	Procore - Cost Type Cost Type - eCMS to Procore								01/27/2	019 11:26	28 AM	A	нос		SU	CCESS		1			1		(	)								

#### **Procore Validation**

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$\leftrightarrow \   \ni \   G$	🗎 http	s://sandbox.pro	ore.com/13670/	company/admin/line_ite	em_types	
PROCO	Æ	Rich Procore FUT Select a Project	Ŧ	Company Tools Admin		★ Favorites

Procore Cost Types

COST TYPES 🖗			
Label	Abbreviation 🛛	Default Cost Types	
Burden	в		
Equipment	E		
INCOME	1		
LABOR	L		
Materials	м		
Overhead Allocation	0		
Subcontracts	s		
Rentals	R		
Other	0	Other	
Professional Services	svc	Professional Services	
Owner Cost	oc	Owner Cost	
Commitment	s	Commitment	
Materials	м	Materials	
Equipment	E	Equipment	
Labor	L	Labor	
Add a Cost Type	Add abbreviation		+ Add

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#### 6. Budgets – eCMS > Procore

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Subcontract	Contracts	Approved C	O Pe	nding C/O	Purchase C	Irders Hou	s Summary																		
Job Number:	PROCO	R	Procore 0	002		Cus	tomer #:			22	222						Star	t Date:		00	0/00/0000				
Sub Job:	002					Cus	tomer Name	:		Be	erkshire						End	date:		99	9/99/9999				
Status:	OPEN																								
	Curre	nt Budget		Proposed B	Budget	Budge	t Hours	Actu	al Cost		Actual Ho	ours		Open Comn	nitted		Total Co	mmitted		Remain	ing	Est @	Compl	Over	/Under
INCOME																									
Burden		25,000			25,000															25,	000		25,000		
Equipmen		600,000		6	00,000															600,	000	6	500,000		
LABOR		300,000		3	00,000															300,	000	3	300,000		
Material		900,000		9	00,000				15,000					45	0,000			465,000		435,	000	ç	900,000		
Overhead		1,500,000		1,5	00,000															1,500,	000	1,5	500,000		
Rentals		600,000		6	00,000															600,	000	6	500,000		
Subcontr	1,200,000				00,000									5	0,000			50,000		1,150,	000	1,2	200,000		
Totals	5,125,000				25,000		0		15,000			0		50	0,000			515,000		4,610,	000	5,1	125,000		0
Grs Pft	-5,125,000				25,000				15,000											-5,110,	000	-5,1	125,000		
Profit %		0			0				0												0		0		

Admin > Application Installation > eCMS Connect Setup

#### Scheduler

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#### Run Ad Hoc Job

Logs

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REQ Service T&M	User Menu												
													7
Application Installation						Logs							webservicelogs
Setup Instance Field Ma	apping Setup Notificati	on Portfolio Maps	Setup Groups	Scheduler	Logs	Manage Scheduler	Viewpoint Setup						Initial Load
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			Schedule										
			Photos										
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			Specifications										
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#### Project Tools > Budget

Budget • PROCOR/002 × +									- 0 ×
← → C	com/projects/7747/budge	ting							☆ ♀ 0 :
PROCORE     Rich Procore FUT     PROCOR/002 -	Project PROCOR Budge	: Tools et	★ Favorites						₩ ? 🌲 RB
BUDGET Budget Change H	listory							(What's New?	+ Create Budget Line Item
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✓ Description	Cost Code	Cost Type	Original Budget Amount	Budget Modifications	Approved COs	Revised Budget	Pending Budget Changes	Projected Budget Com	IMPORT BUDGET
✓ PROCOR/002									Download CSV Template
✓ 1000100000 - Phase 1									Download Excel Template
1000100000 - Phase 1: LABOR	1000100000 - Pha	LABOR	\$100,000.00	\$0.00	\$0.00	\$100,000.00	\$0.00	\$100,000.00	Choose File No file chosen
Subtotal 1000100000 - Phase 1			\$100,000.00	\$0.00	\$0.00	\$100,000.00	\$0.00	\$100,000.00	Need Help? Import
✓ 1000200000 - Phase 1									
1000200000 - Phase 1: Equipment	1000200000 - Pha	Equipment	\$200,000.00	\$0.00	\$0.00	\$200,000.00	\$0.00	\$200,000.00	BUDGET REPORTS
Subtotal 1000200000 - Phase 1			\$200,000.00	\$0.00	\$0.00	\$200,000.00	\$0.00	\$200,000.00	Budget Modifications
✓ 1000300000 - Phase 1									Budget Detail Report
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✓ 1000400000 - Phase 1									CUSTOM REPORTS + New

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#### 7. Actuals – eCMS > Procore

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#### Admin > Application Installation > eCMS Connect Setup

#### Scheduler

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#### Run Ad Hoc Job

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SMARTER CONSTRUCTION. COMS CLOUD-BASED CONSTRUCTION ERP SOFTWARE.

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#### Project Tools > Direct Costs

C Direct Costs • PROCOR/002 × +						- 0 ×
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DIRECT COSTS Summary Summary By Cost Code	2			Expo	t 🕶	+ Add New Direct Cost
SUMMARY						SEARCH DIRECT COSTS
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View 01/28/19	Expense	Approved	\$15,000.00			
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## III. Procore > eCMS Integration

1. Subcontracts – Procore > eCMS

Tool Box > Commitments

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C Commitments - PROCOR/002 × +	Manage all vendor subcontracts and purchase orders.	- 5 × x 0 6 :
PROCOR/002 - PROCOR Commitments     Commitments	* *	Create Purchase Order Create Subcontract
,	anage all vendor subcontracts and purchase orders.	
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#### Create Subcontract

Commitments • PROCOR/002 × +				- 0 ×
← → C	/7747/project/commitments/work_order_contracts/new			☆ ♀ 8 :
PROCORE     Rich Procore FUT     PROCOR/002 - PRO	OCOR	Favorites		₩ 3 🌲 RB
Commitments > New Contract				
No Contract Title - No (	Contract Company			
General				
GENERAL INFORMATION 🗸				
#	SC-PROCOR/002-001	Title:	BS SC 1	
Contract Company:	Building Supply	Invoice Contacts:	Start typing to search people	
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SMARTER CONSTRUCTION. eCMS CLOUD-BASED CONSTRUCTION ERP SOFTWARE.

47/project/commitments/work_order_	ntracts/new		☆ ◎
	Drag and Drop File(s)		
01/28/2019	Estimated Completion Date:	01/31/2019	
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Cancel Create & Email Create & Enter SOV

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#### Create and Enter SOV

Com	mitments •	PROCOR/002 × +								- 6 ×
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BS	SC 1	- Building Supply								+ Create Invoice 🛛 🕥
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										🗊 Delete 🛛 😧
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#### Create line items

Save

#### eCMS Connect Processing

Admin > Application Installation > eCMS Connect Setup

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#### Run Ad Hoc Job Procore – Subcontract

Logs

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eCMS Connect will process the Subcontract transaction through update, there is no need for user intervention unless there are errors. If there are errors a user will need to correct the issue and resubmit the eCMS Connect.

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2. Change Orders – Procore > eCMS

Note to Users, the Accounts Payable Defaults, and "Allow the addition of a new line item to an approved subcontract" and "Create Subcontract Items thru ISP" must be checked.

Toolbox > Commitments

Commitments • PROCOR/001 ×	+														- 8
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g	Title	Contract Company	Status	Executed	Original Contract Value	Approved CCOs	Total Contract Amount	Invoices	Pending CCOs	Draft CCOs	Total Payments	Total Remaining	% Paid		
t View SC-PROCOR/00	2-001 BS SC 1	Building Supply	Approved	No	\$100,000.00	\$0.00	\$100,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$100,000.00	0.00%	6	Cancel Searce
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#### Select Edit for a Subcontract

Commitments + PROCOR/002 × +	- 0 ×
🗧 🖻 😋 🔹 https://sandbox.procore.com/1747/project/commitments/work_order_contracts/5719/edit	☆ ♀   ⑧ :
ROCORE Ruch Procore FUT     PROCOR/002 - PROCOR      Project Tools     Commitments	₩ 😧 🌲 RB
Commitments > Contract #SC-PROCOR/002-001 BS SC 1 - Building Supply	+ Create Change Event + Create Invoice
General Schedule of Values (2) Subcontractor SOV (0) Change Orders (0) RFQs (0) Invoices (0) Payments Issued (0) Related Items (0) Emails (0) Change History (28) More -	+ Create Payment
# SC-PROCOR/002-001 Title: BS SC 1	🔄 Email Contract
Contract Company: Building Supply V Involce Contacts: Start typing to search people V	COMMITMENT REPORTS
Status: Approved   Executed:	Buyout Summary Report Committed Cost Report
Private:     Allow These Users To See SCV I terms     No users available	Subcontractor Invoices By Date
Default Retainage: %	

#### Create a Change Event

Change Events • PROCOR/002 × +			- 0 ×
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New Change Event			
GENERAL INFORMATION			
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Change Event #:	001	Title:	BS SC CO 1
Status:	Closed 💌	Scope:	Out of Scope *
Type:	Contingency -	Change Reason:	Client Request 🔹
Description:	B I U EF S TE HE EF EF EF K K K K K FontSkas ·	• <u>A</u> • <u>A</u> • <b>6</b> ∂	
Attachments:	% Attach File(s)	Drag and Drop File(s)	)
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Cancel Create

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#### Create

#### Project Tools > Change Events

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#### Bulk Actions > Create Commitment CO

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Commitments • PROCOR/002 × +			- @ <mark>-</mark> ×
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Commitments > Contract #SC-PROCOR/002-001 >	Change Orders      New Commitment Change Order		
New Commitment Chang	ge Order		
General			
GENERAL INFORMATION			
#:	001	Date Created:	01/28/19 at 09:33 am
Revision:	0	Created By:	Richard Brown
Contract Company:	Building Supply 123 Broadway Bakersfield, California 95555 United States	Contract:	SC-PROCOR/002-001 - BS SC 1
Title:	CE #001 - BS SC CO 1		
Status:	Draft 👻	Private:	×
Change Reason:	Client Request 🔹	Accounting Method:	Amount Based Inherited From BS SC 1: Amount Based
Due Date:	01/31/2019	Invoiced Date:	
		Paid Date:	<b>m</b>
Designated Reviewer: 🛛	•	Request Received From:	•
Reviewer:		Review Date:	
Executed:		Signed Change Order Received Date:	01/28/2019
Schedule Impact:	10 days	Location:	Select a Location 🔹
Reference:	1		
Field Change:		Paid In Full:	
Attachments:	Attach File(s)	Drag and Drop File(s)	)
Total Amount:	\$25,000.00		
			Cancel Create & Email Create

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#### Create

Commitments • PROCOR/002 × +				- 🗆 🗙
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STATUS: DRAFT			Edit	COMMITMENT REPORTS Buyout Summary Report Committed Cost Report
#:	001	Date Created:	01/28/19 at 09:35 am	Subcontractor Invoices By Date
Revision:	0	Created By:	Richard Brown	
Contract Company:	Building Supply 123 Broadway Bakersfeld, California 95555 United States	Contract:	SC-PROCOR/002-001 - BS SC 1	
Title:	CE #001 - BS SC CO 1			
Status:	Draft	Private:	Yes, visible to Admins	
Change Reason:	Client Request	Accounting Method:	Inherited From SC-PROCOR/002-001 - BS SC 1: Amount Based	
Due Date:	01/31/19	Invoiced Date:		
		Paid Date:		
Designated Reviewer: 0	Unassigned	Request Received From:		

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#### Admin > Application Installation > eCMS Connect Setup

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#### Run Ad Hoc Job Procore – Change Orders

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eCMS Connect will process the Subcontract Change Order transaction through update, there is no need for user intervention unless there are errors. If there are errors a user will need to correct the issue and resubmit the eCMS Connect.

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3. Budget Update – Procore > eCMS

#### Tool Box > Budget

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#### Create Budget Line Item

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$\leftrightarrow$ $\rightarrow$ C $\bullet$ https://sandbox.procore.com/projects/7747/bud	lgeting					☆ ♀ 8 :
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BUDGET     Budget     Change History					(What's New?)	+ Create Snapshot
CREATE NEW BUDGET LINE ITEM						IMPORT BUDGET
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View Snapshots	Group	Filter				Need Help? Import
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#### eCMS

#### Admin > Application Installation > eCMS Connect Setup

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Run Ad Hoc Job Procore \_ Budget Update

Logs

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eCMS Connect will process the Budget Update transaction through update, there is no need for user intervention unless there are errors. If there are errors a user will need to correct the issue and resubmit the eCMS Connect.

Job Cost Master

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#### 4. Purchase Orders – Procore > eCMS

#### Tool Box > Commitments

Budget • PROCOR/001 × +													
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PROCORE IN PROCOR/001-PRO	D • 🗙 TOOLBOX Budget	•	FAVORITES			A	La la	le la				Ţ,	€ ▲ RB
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#### Create Purchase Order

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SMARTER CONSTRUCTION. eCMS CLOUD-BASED CONSTRUCTION ERP SOFTWARE.

	re.com/7747/project/commitments/purchase_order_contracts/new		☆ ○
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#### Create and Enter SOV

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												Subcontractor Invoices By Date	

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#### eCMS

Admin > Application Installation > eCMS Connect Setup

#### Scheduler

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#### Run Ad Hoc Job Procore – Purchase Order

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Action		Group Name	•			Service	Name 🔹		Exec	ution Tim	e 🗸	Ð	ecution T	ype e	Status	•	Total Count	t e	Success	Count 🛊		Error Cou	int ¢	Error Log	) ÷	Error Report	t •
🔳 🗙	EXAMPLE AND ADDRESS OF A DECOMPANY AND ADDRESS AND ADDRES																										

eCMS Connect will process the Purchase Order transaction through update, there is no need for user intervention unless there are errors. If there are errors a user will need to correct the issue and resubmit the eCMS Connect.

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SMARTER CONSTRUCTION. eCMS CLOUD-BASED CONSTRUCTION ERP SOFTWARE.

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	GROUP	REMOTE PO#/	PURCHASE	VENDOR				SUB		EXTENDED	
	NO.	REFERENCE #	ORDER #	NO.	VENDOR NAME		JOB	JOB	QUANTITY	AMOUNT	
	124		5712	111	Acme Escavating (	Comp	PROCOR	001	3.00	4500.00	
	125		5712	111	Acme Escavating (	Comp	PROCOR	001	4.00	6000.00	
	126		5721	222	Building Supply		PROCOR	002	100.00	150000.00	
	127		5721	222	Building Supply		PROCOR	002	200.00	300000.00	
						•• co	/DIV TOT	AL	307.00	460500.00	
						** RE	PORT TOT	AL	307.00	460500.00	

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