Procore API Integration with Asuretify

Set-Up & Managing Settings

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Overview
Asuretify is a software solution, offering seamless integration with Procore to equip users with the tools to share insurance requirement data in an organized and efficient process. This connection for sharing tracked data between systems like Procore and Asuretify is known as an API Integration. It allows users to easily share various modules such as projects, commitments, and vendors with lightning speed.

Manage your risks and regulations by exporting your insurance and compliance status directly to Procore, saving you time, reducing error, and providing enhanced security and privacy. Not only is Asuretify easy to use, it's compatibility with various devices and browsers let you to access your information and organize it for maximum work efficiency!

Benefits of Integration
- Sync data in real time between Procore and Asuretify
- Automate processes to save time and increase efficiency
- Export insurance compliance status to Procore
- Review and Manage COI requirements easily
- Decrease errors related to redundant manual data entry
- Ensure compliance with contracts and regulations
- Review the authenticity of uploaded insurance documents and details
- A trustworthy and reliable source for insurance verification

API Integration Prerequisites
Procore
- A Procore admin account with security settings granted to allow data access through Procore API's
- Install the Asuretify appl from Procore App Marketplace (See page # for instructions)

Asuretify
- User must have an Enterprise account with access to API Integration feature enabled

Procore-Asuretify Module Details
Users can select modules that share specific data between the systems. Procore and Asuretify use the same or similar terminology when referencing certain details.

The chart below outlines the module name, vocabulary, and terminology related to the data transferred between systems. Bolded titles indicate module types which can be selected for sharing data with arrows indicating the direction of data shared from one system to the other.

PROCORE		asuretify
Project		**Project**
Name	→	Project Name
Project Number	→	Project Number
Project Location	→	Project Address
Start Date	→	Estimated Start Date
Completion Date	→	Estimated Completion Date
Total Value	→	Estimated Contract Value
Project Companies		**Contractors**
Company Name	→	Contractor Name
Address	→	Address
Email	→	Email
Business Phone	→	Phone Number
Website	→	Website
DBA	→	DBA
User's First Name	→	Contacts First Name
User's Last name	→	Contact's Last Name
User's Email	→	Contact's Email
User's Business Phone	→	Contact's Phone Number
Commitments		**Contracts**
Company Name	→	Contractor Name
Address	→	Address
Email	→	Email
Business Phone	→	Phone Number
Website	→	Website
DBA	→	DBA
Compliance Status		**Status**
Type	←	Coverage Name
Status	←	Compliance Status
Policy Number	←	Policy Number
Insurance Provider	←	Insurance Company
Limit Amount	←	Coverage Limit
Effective Date	←	Policy Start Date
Expiration Date	←	Policy End Date
Insurance Sets	←	Insurance Requirement

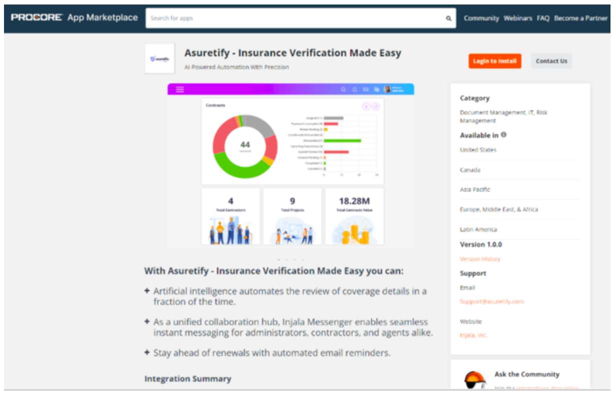
How to Configure API Integration

Successfully integrating your Procore and Asuretify account can be done in a few easy steps. The details below can help you prepare your accounts to ensure a seamless connection.

Install Asuretify from Procore App Marketplace

You can access the download page through the following link:

https://marketplace.procore.com/apps/asuretify-insurance-verification-made-easy



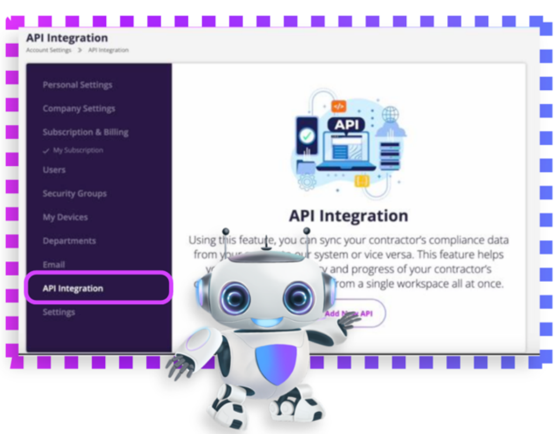
Prepare Procore Data

If you currently have projects, companies, commitments, or other data in Procore, be sure you have reviewed your tracked details. Ensure all details you would like to import into Asuretify are entered in Procore, Insurance Requirements are assigned, and any revisions to your data are made **before** you connect and start sharing details for risk management with Asuretify.

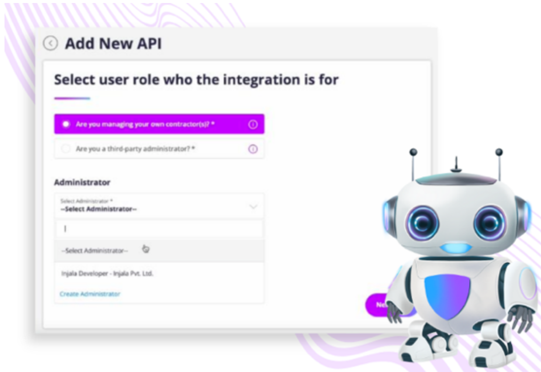
Connect to Procore in Asuretify

1. After installation, the Asuretify application will be accessible by clicking: Apps > App Management > Installed Apps.

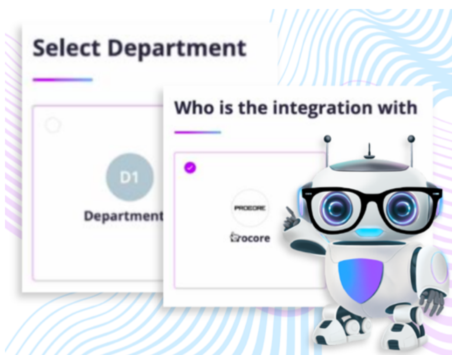
2. **Open your account settings in Asuretify** and select API Integration from settings menu. From there, new users will see a screen that provides some information about how data can be shared and click "Add New API" to begin connecting their accounts.



3. **Select the user's role** for the account initiating the API integration and to be connected. Other required details include identifying if you are managing your own contractors or if you're a third-party administrator providing management services. Details of users managing their own contractors have already been entered into Asuretify when creating their account, but third-party administrators will need to provide details of their sponsor.

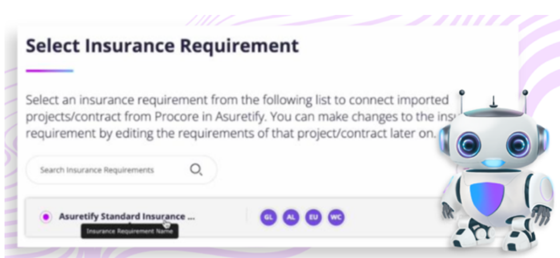


4. **Select the department** that will share data utilizing this method of data sharing. This selection is where data will be imported to and exported from. Then, select the integration partner system you'll be sharing data with. The example below show compliance verification and tracking with Procore.

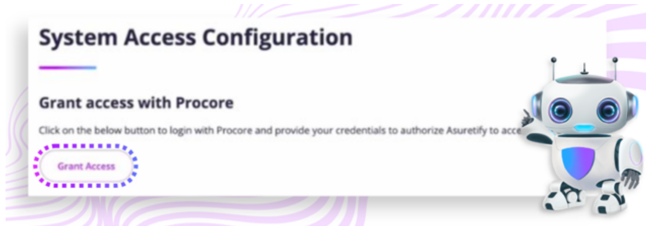


5. **Select module preferences** that will be imported to Asuretify from Procore. Then select the modules that will be exported from Asuretify and imported into Procore. Details of the module terminology as it relates to each system can be referenced in the section titled Procore-Asuretify Module Details (page 3).

6. **Select insurance requirements** with the modules of the API integration, allowing the user to organize tracking details in Asuretify. Asuretify features allow you to view statistics and generate customized reports, allowing you to stay organized and maintain efficient and accurate work necessary for successful compliance management.

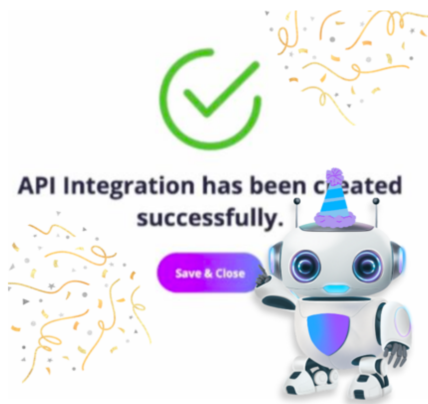


7. **Grant access** to make the connection and begin sharing data between your risk management systems. In Asuretify, enter your login credentials of the integrated system to grant permissions for sharing the selected data between the systems.

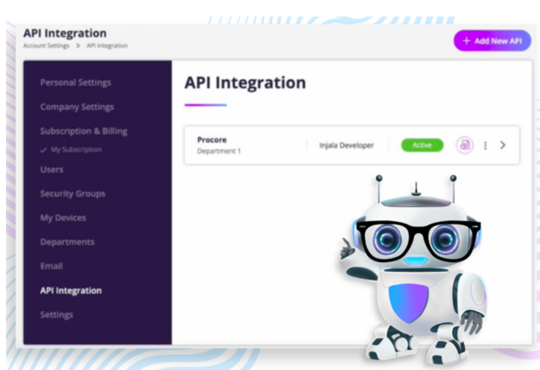


8. **Connection success** screen is displayed, notifying you that access was granted to the account. If the login details match, click next, otherwise if any errors occurred, click "Regrant Access" to try again.

9. **Integration established** appears to confirm that the connection for sharing data has been both systems was successful. All that's left to do is click "Save & Close" to get back to your Integrations list and start viewing the details of your projects and manage contractor compliances with Asuretify's handy tools and features!



10. **The API Integrations** screen lists the active integrations currently connected to your Asuretify account. Not only can you add more connections to other systems, you can click to view the details of current connections that are sharing your risk management details.



Procore Custom Fields

Not all risk management systems track the same industries, fields, and details. Asuretify provide users the flexibility to track the data most important to their work. Sharing the selected data through the API integration with Procore allows users to select the specific insurance requirements from the Subcontract module.

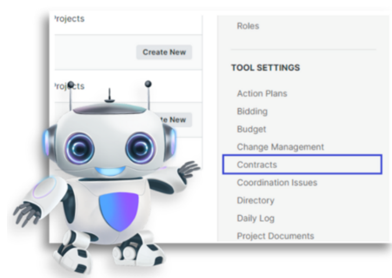
A custom field called "Insurance Requirement" will be added to Procore's Subcontract module. Features include a drop-down menu populated with insurance requirement names from Asuretify.

After synchronizing, or sharing, a new subcontract in Asuretify, the insurance requirements for the contract are automatically mapped. This automated process replaces manual adjustments to insurance requirements for each contract.

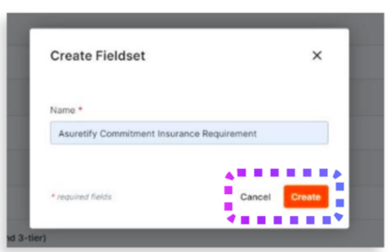
Please note: account prerequisites for this process include having admin rights enabled to set up custom fields for subcontracts (commitments).

Set-Up Instructions

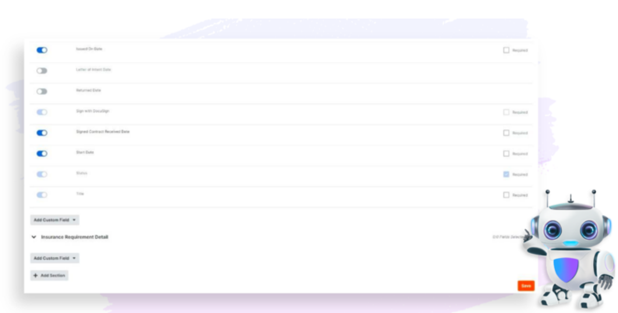
1. Login to your Procore account and click the User Profile Icon > Tool Settings > Contracts.



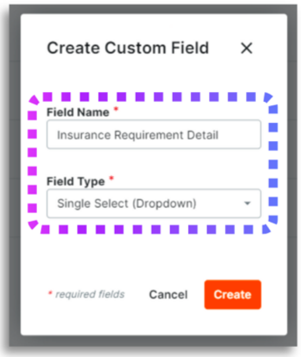
2. Locate the **Fieldsets** section at the top of the screen and navigate to that page. Then click "Create New" to add a new fieldset specifically for **Subcontracts**.



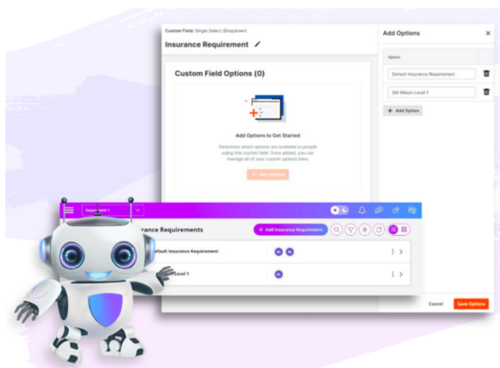
3. An optional step is adding a new section called "Insurance Requirement Detail" to help with identification or you can add the field directly.



4. Add a custom field named "Insurance Requirement" and set the field type as "Single Select (Dropdown)" then click "Create". **Be sure to match the field name and type match exactly.**



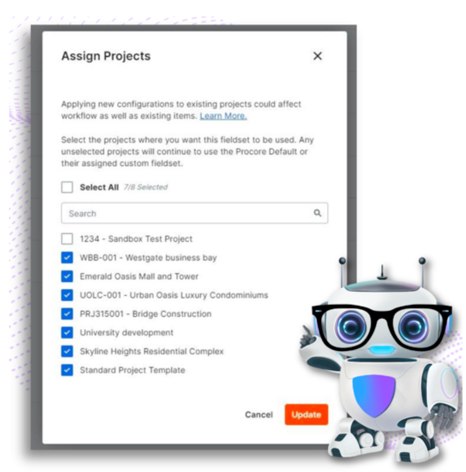
5. Enter the custom field options with the insurance requirement names and titles exactly as they are entered into Asuretify. **It is crucial** that these names and titles match to ensure all data is properly shared between both systems.



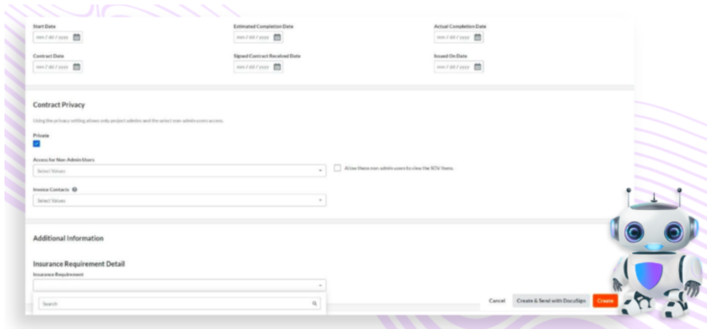
6. Another optional step is assigning the custom field to existing projects. Doing this can ensure that the custom field applies to subcontracts within those projects.

   To simplify these steps for future projects, consider adding custom fields to the project template (e.g. **Standard Project Template**).

   Custom field settings and optional values will be copied to new projects that are created with this template.



7. After completing set-up, the custom field for insurance requirements should appear and can be selected in Commitments. This feature works directly with new contracts to share with Asuretify. For existing contracts, you may need to adjust some details in Asuretify.



8. Following these steps helps both systems when sharing your insurance requirement details with one another. Doing so streamlines efficiency and provides smooth workflows so you can find what you need, when you need it!

Track Live Activity

The activity log allows users to track data movement. You can see what was imported and where it was organized within the system.

The Activity Log shows a documented history that can be viewed to monitor the activity and progress made by different users, through each step of the compliance verification process.

Asuretify Feedback & Support

Here at Injala, it is our goal to create helpful systems that simplify tedious and complex tasks. We value feedback as it helps us make our system as handy and helpful for your risk management needs. If you have any suggestions or need assistance, our team is readily available and happy to help!

For assistance or questions, please reach out to our Asuretify support team:
support@asuretify.com

Thank you for choosing Asuretify for your compliance verification and risk management needs. We look forward to supporting your most efficient workflows!