

FinishLine Software and Procore Integration

Objectives: Allow for reports generated in FinishLine to be pushed to a selected folder in Procore Documents repository. User can either manually push a generated report through the interface or set it to be uploaded automatically on a schedule.

Push a generated report to the Procore Documents Repository via the FinishLine Software interface.

When “Upload to Procore” is selected, the file is uploaded to the Procore Documents Repository.

The screenshot displays the 'Report Options' window in the FinishLine software. At the top, the 'FINISHLINE LIST MANAGEMENT SOLUTIONS' logo is visible. Below it, the text 'FinishLine Punch List Reports' is shown. The window contains a table with columns for 'File', 'Attachment File', and 'Size'. A single row shows a file named 'report.pdf' with a size of '0.27 MB'. Below the table, there are two checkboxes: 'Send Email' (unchecked) and 'Upload to Procore' (checked). A red arrow points from a callout box to the 'Upload to Procore' checkbox. Below these options, a 'Current Folder' section shows a tree view of folders: '01 Design Files', '02 Bid Packages', '03 Safety', '04 Subcontractor Files', and '05 INTERNAL DOCUMENTS'. The '02 Outbound' folder under '04 Subcontractor Files' is selected, highlighted in blue, and a red arrow points from a callout box to it. At the bottom of the window, there is a 'Clear' button and a yellow 'Upload to Procore' button.

After generating a report in FinishLine, user can decide if they want to email the report and/or upload it to Procore

User can select a folder from the Procore Documents repository

The FinishLine Software PDF report is now in the selected folder in the Procore Documents Repository.

Documents • Sandbox Test Proj X +

sandbox.procore.com/639/project/documents?folder_id=651504

PROCORE PunchList Tracking: Company ... 1234 - Sandbox Test Proj... Project Tools Documents Favorites Documents Punch List Apps Select an App ? MS

You are currently viewing a test project. This is intended for learning purposes so you can get to know Procore. [Learn More](#)

Documents Search Add Filter + New


- Sandbox Test Project
 - 01 Design Files
 - 02 Bid Packages
 - 03 Safety
 - 04 Subcontractor Files
 - 01 Inbound
 - 02 Outbound**
 - 05 INTERNAL DOCUMENTS

042B61B3-1st_floor_con... .pdf X

042B61B3-1st_floor_condo_report.pdf is s... Download Upload Email Info More

Name	Created On / Latest Version
<input type="checkbox"/> 2A673524-report_... .pdf	08/23/19 at 01:24 pm by Mr ...
<input checked="" type="checkbox"/> 042B61B3-1st_floo... .pdf	03/24/20 at 09:19 am by tes...
<input type="checkbox"/> 79F9B55A-report_... .pdf	08/23/19 at 01:24 pm by Mr ...
<input type="checkbox"/> 17057808-report_... .pdf	08/23/19 at 01:24 pm by Mr ...
<input type="checkbox"/> B5691F9C-1st_floo... .pdf	03/24/20 at 09:12 am by tes...
<input type="checkbox"/> CEB3BFEC-report_... .pdf	08/23/19 at 01:24 pm by Mr ...
<input type="checkbox"/> DE817C98-report.pdf	03/12/20 at 03:33 pm by tes...
<input type="checkbox"/> E815E95F-report_... .pdf	08/23/19 at 01:24 pm by Mr ...

General Information



Title
042B61B3-1st_floor_condo_report.pdf

Created On
03/24/20 at 09:19 am by test-userless-access-punchlist-tracking

Latest Version
03/24/20 at 09:19 am by test-userless-access-punchlist-tracking

Description
Add a Description...

Location
02 Outbound

Version	Type	Size
1	Adobe Acrobat PDF	1.66 MB

> Permissions

12 New Documents This Week
Items You Are Tracking

Users can Setup FinishLine Software reports to be sent automatically to the Procore Documents Repository

FinishLine Dashboard List View Portal Reports admin admin FINISHLINE LIST MANAGEMENT SOLUTIONS

SAVE REPORT: 1104 TEST

Report Name:

Description:

Active:

Projects: Beta3
 Chinese Tower
 Omega Ranch

Quick Report?

Save as Template?

Access Settings: Private Group

Default Email Options

Options: Single Report to:
 Divided Report to Involved Subs

CC:

Subject:

Body:

Default Procore Options

Folder

- 01 Design Files
- 02 Bid Packages
- 03 Safety
- 04 Subcontractor Files
 - 01 Inbound
 - 02 Outbound**
 - 05 INTERNAL DOCUMENTS

Automatic Notifications

Turn On Automatic Notifications

Upload to Procore? Yes No

Send via Email? Yes No

Send from:

Start On:

Interval:

Request Acknowledgement? Yes No
Note: Acknowledgement is recommended only for reports that are sent on a short interval. Once a report is acknowledged, any item contained in the report will not be emailed again through the automatic notifications system.

Need assistance? Please email support@punchlist.net for more info.