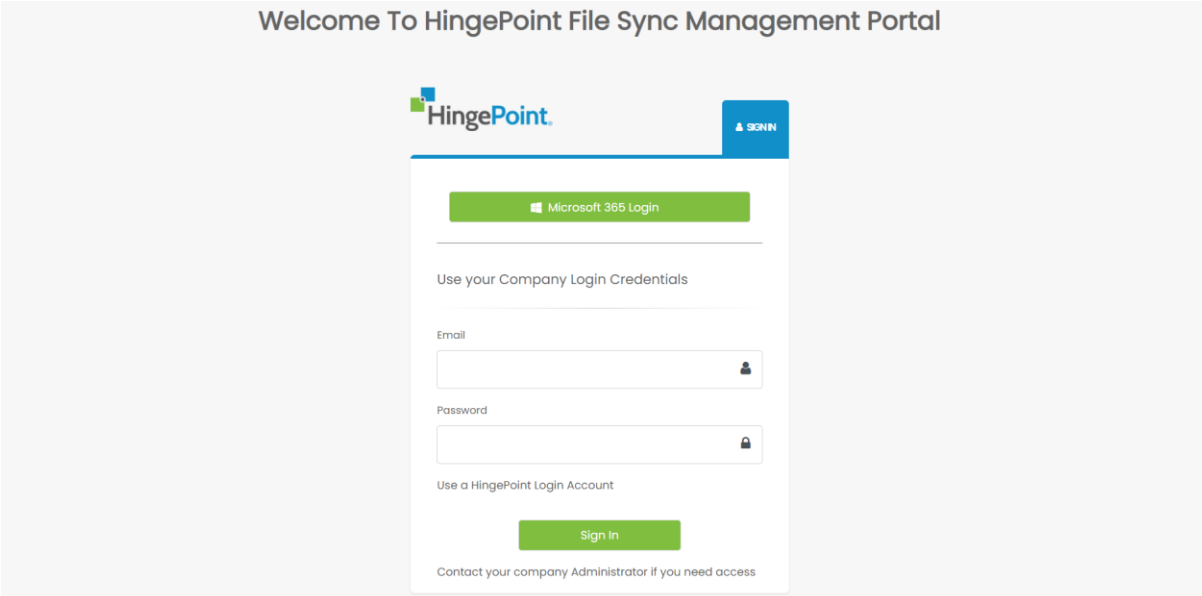
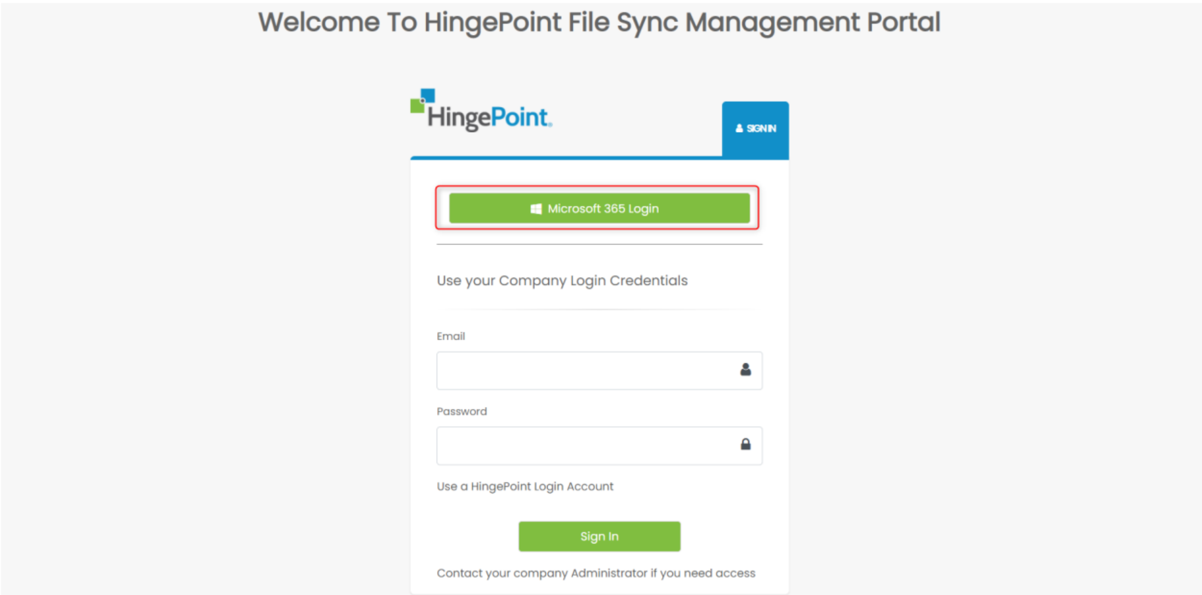
PROCORE FILE SYNC MANAGEMENT CUSTOMER ADMIN USER MANUAL

1. Login:

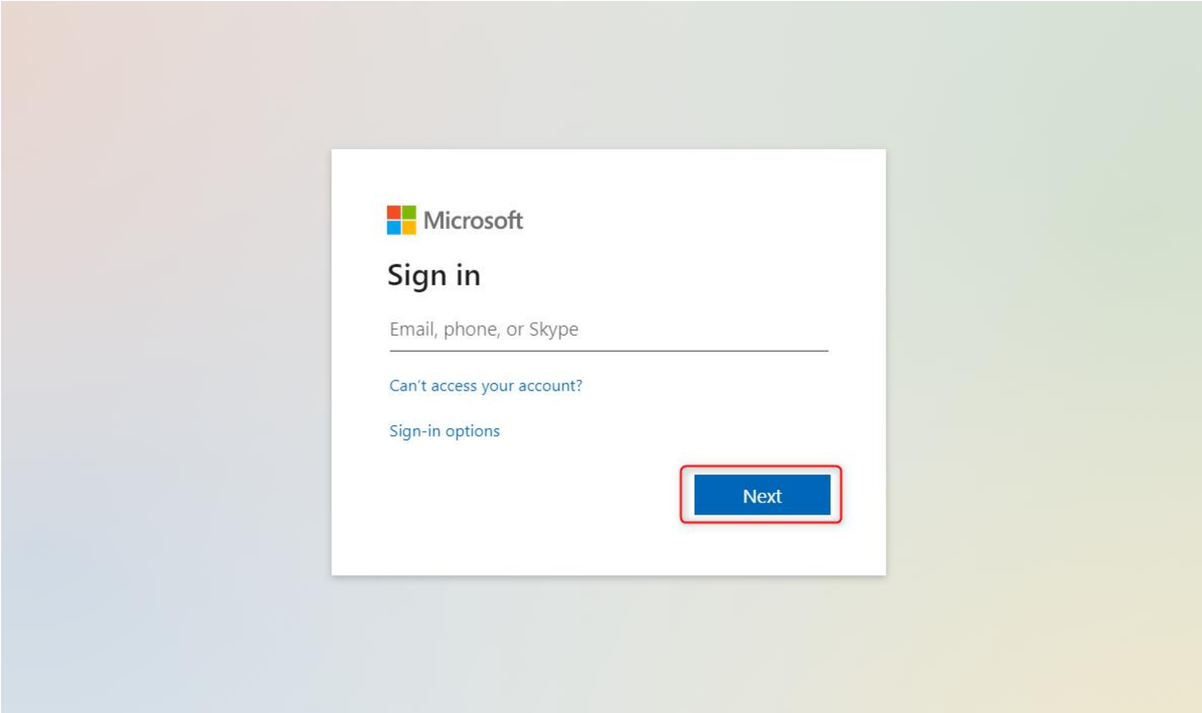
Step 1: Navigate to Management Portal site using the URL https://filesync.hingepoint.com/



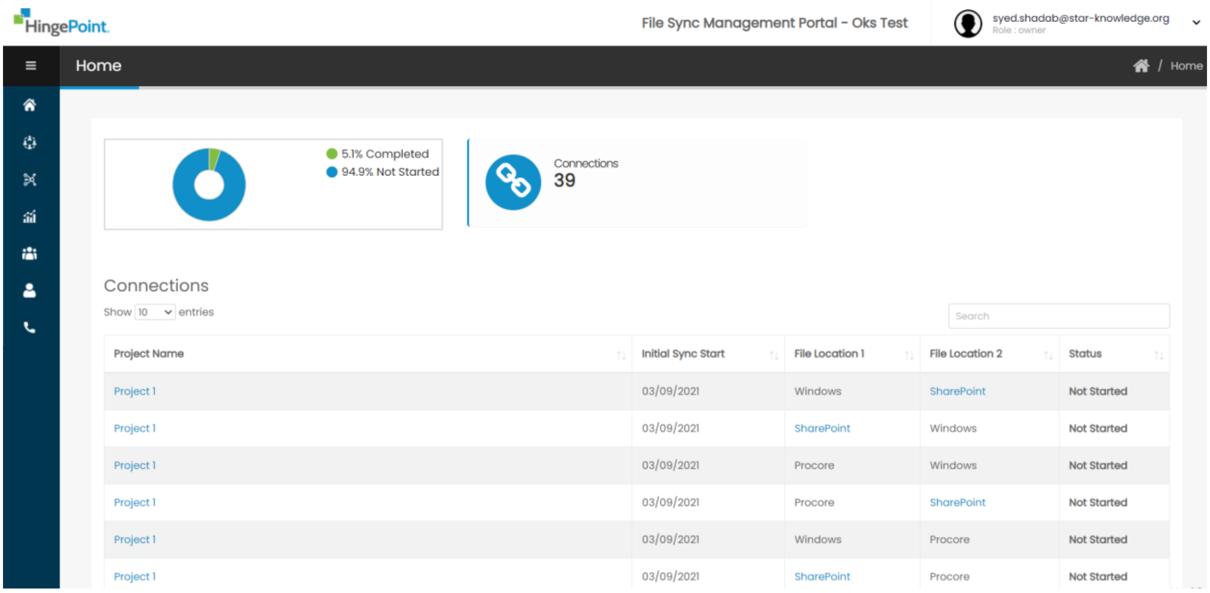
Step 2: Click on Microsoft 365 Login button to login with your Microsoft account.



Step 3: Enter your credentials and click on next.



Step 4: The Home Page is displayed.

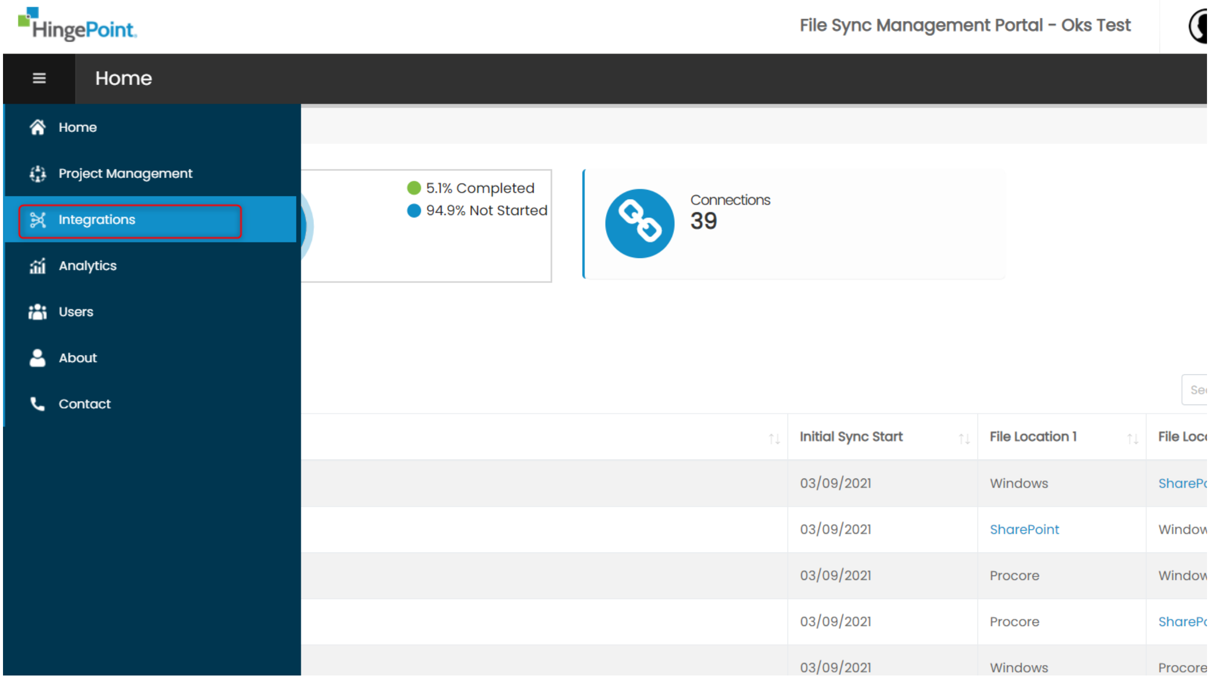


2. Integration:

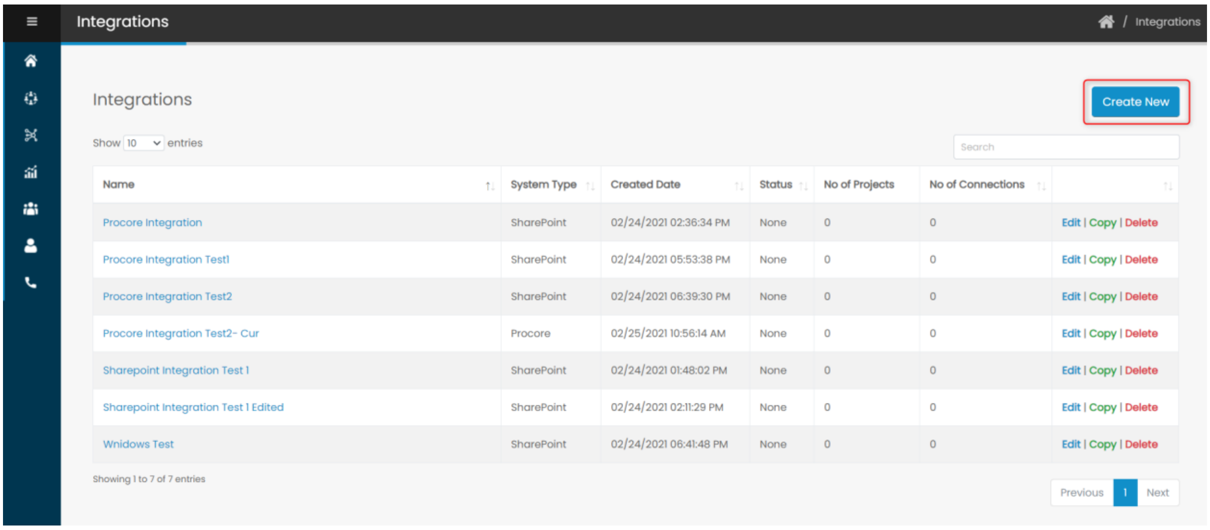
2.1 Create New Integration:

Step 1: Click on integration from the left navigation bar.

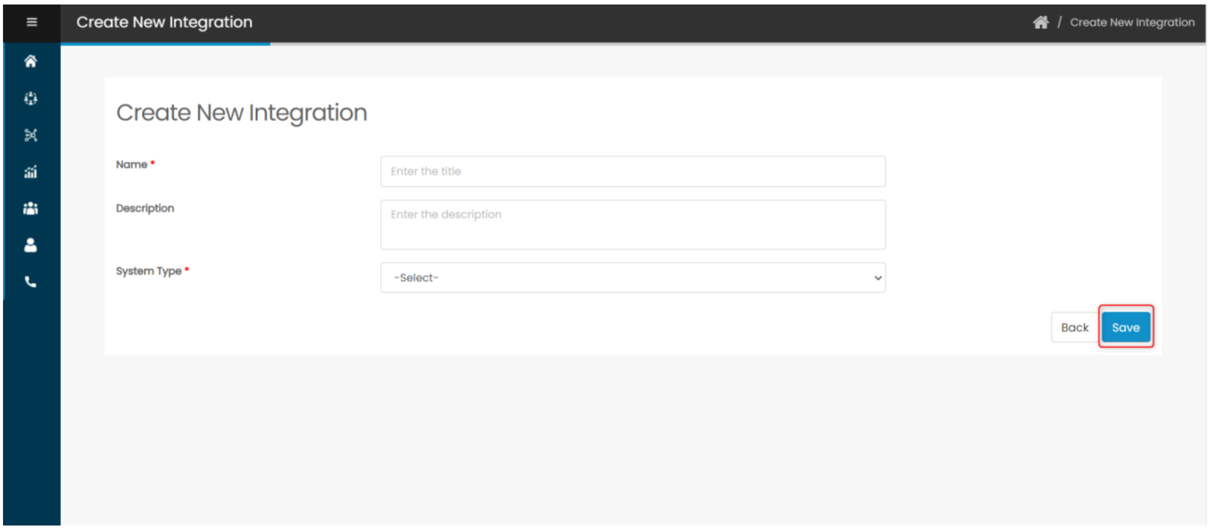
NOTE: Only Account Admins will be able to access the integration screen.



Step 2: Click on create new button.



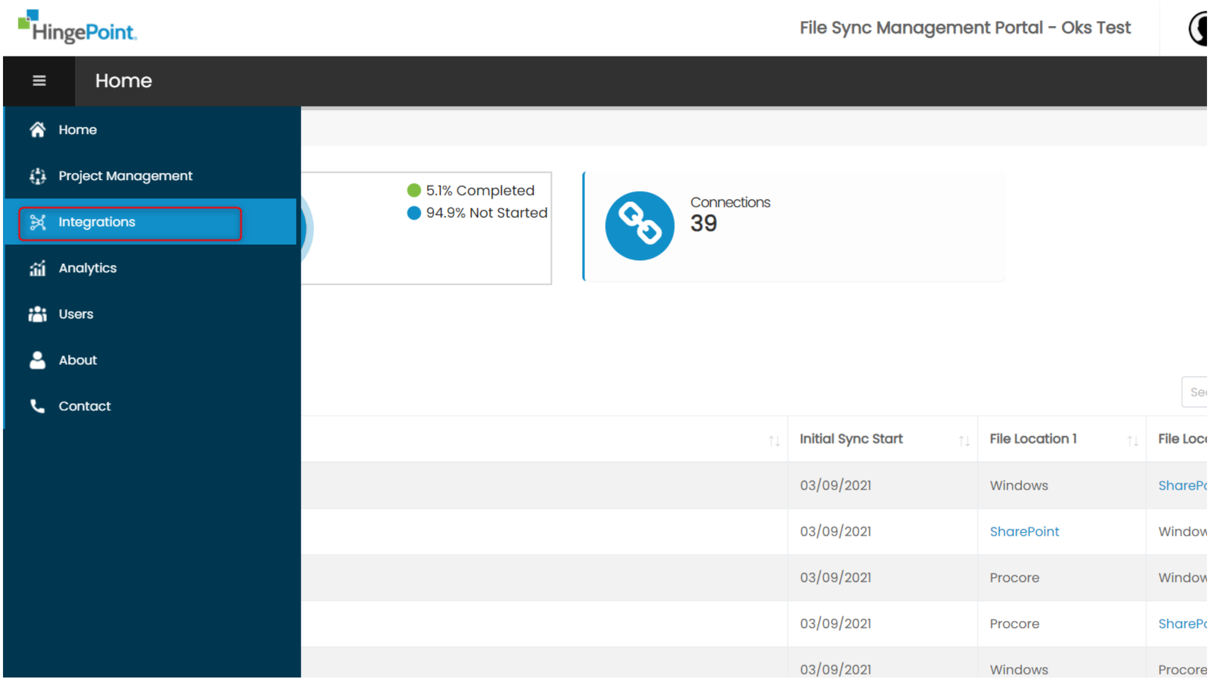
Step 3: Enter the data and click on save.



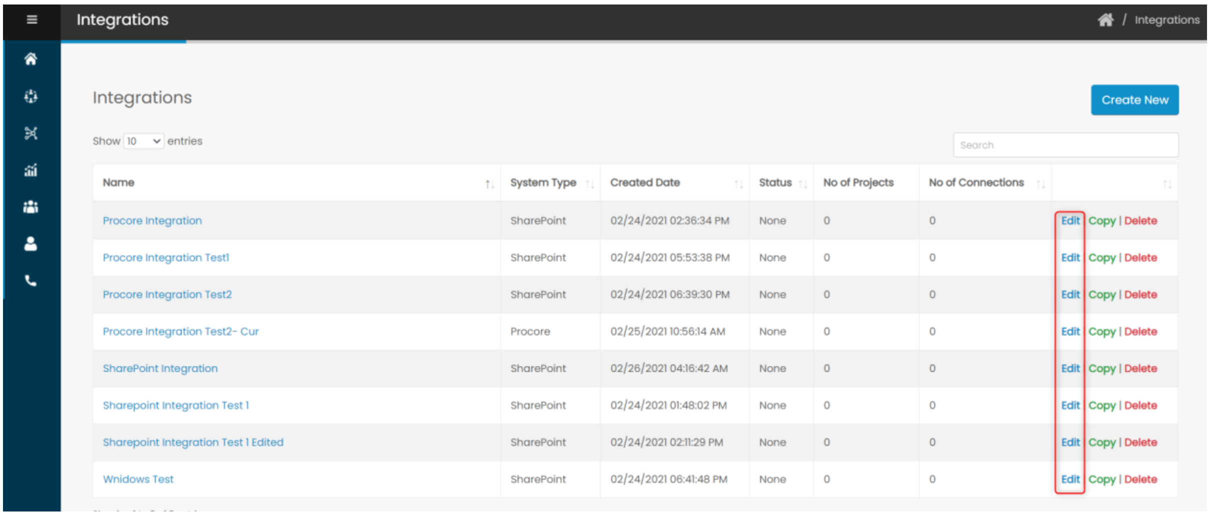
2.2 Edit an Integration:

Step 1: Click on integration from the left navigation bar.

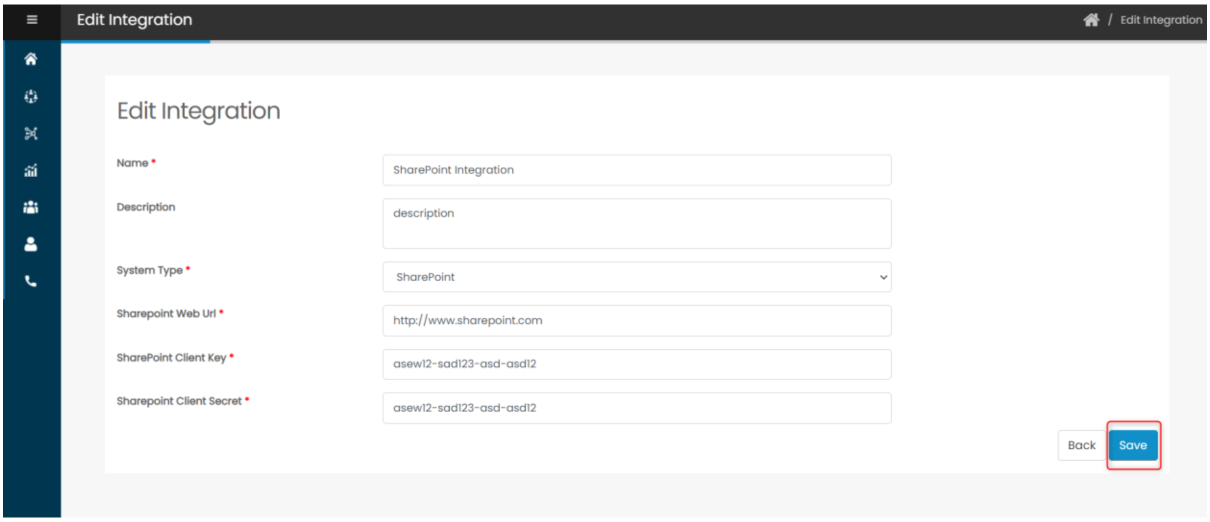
NOTE: Only Account Admins will be able to access the integration screen.



Step 2: Click on the edit button in the integration table for the integration that needs to be edited.



Step 3: Update the fields and click on save.



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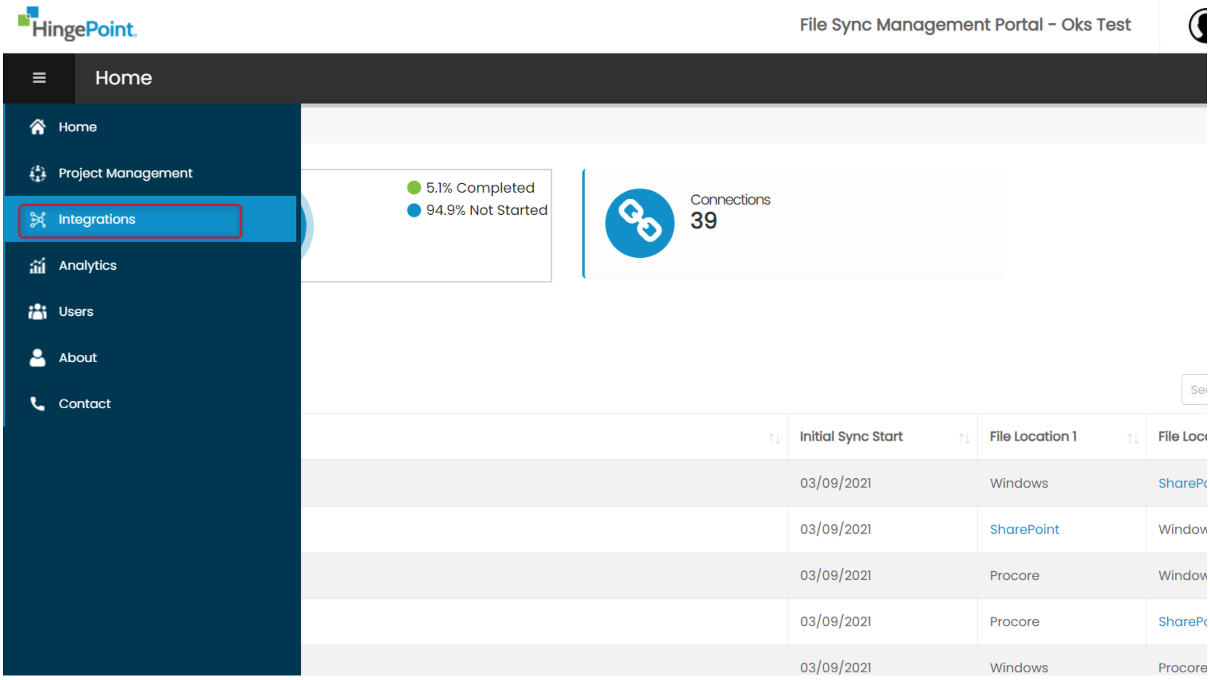
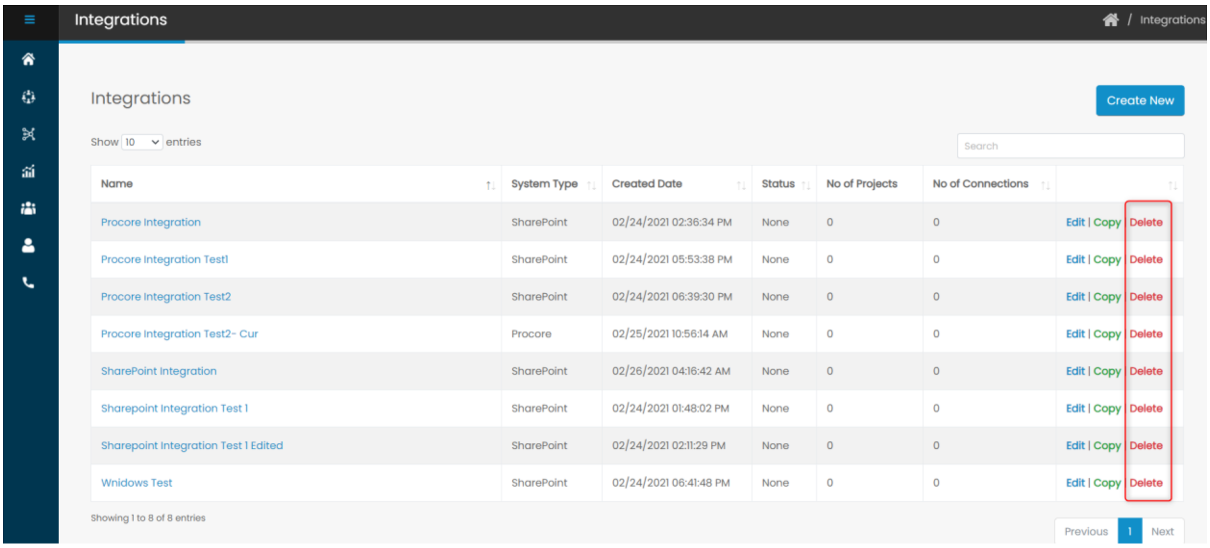
2.3 Delete an Integration:

Step 1: Click on integration from the left navigation bar.

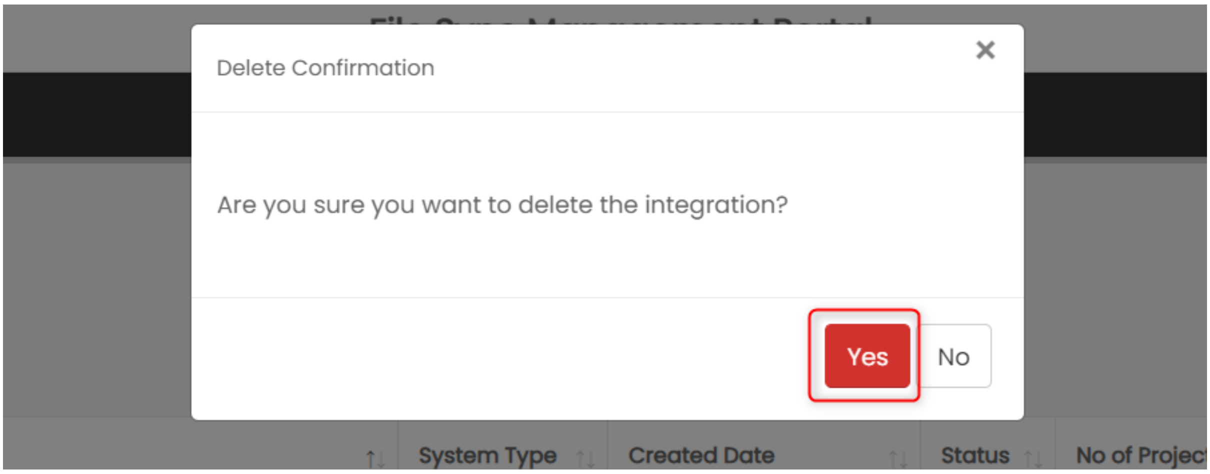
NOTE: Only Account Admins will be able to access the integration screen.



Step 2: Click on the delete button in the integration table for the integration that needs to be deleted.



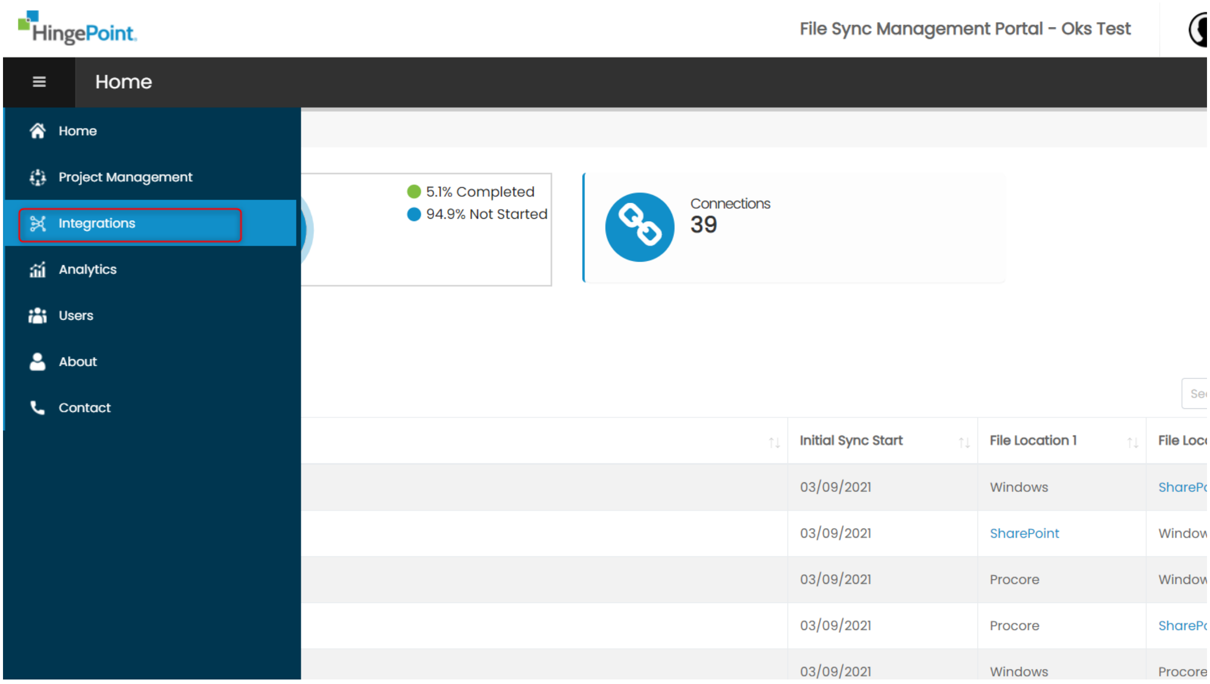
Step 3: Click on yes to delete the integration.



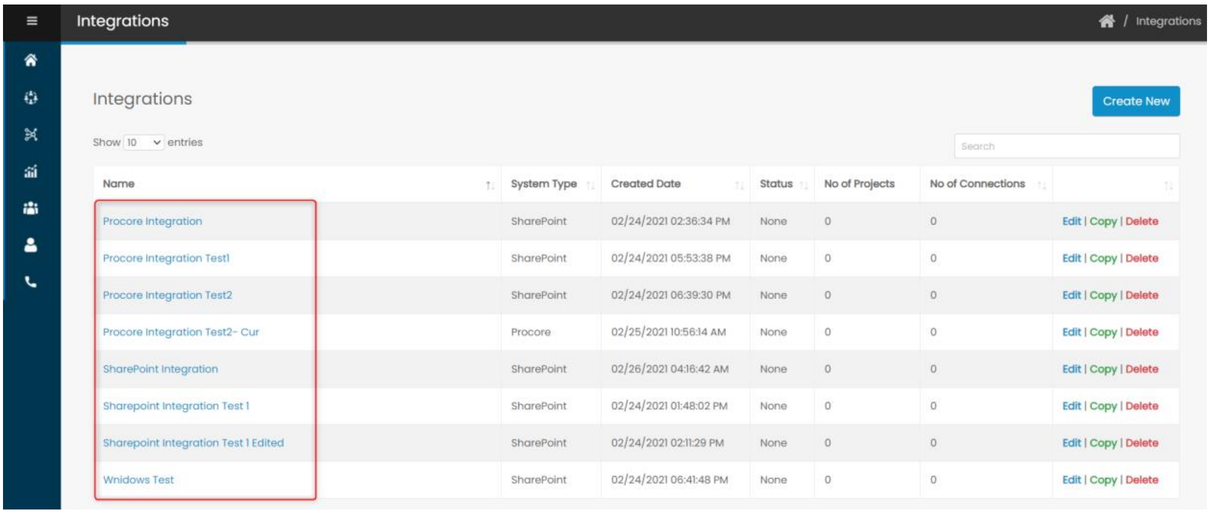
2.4 View an Integration:

Step 1: Click on integration from the left navigation bar.

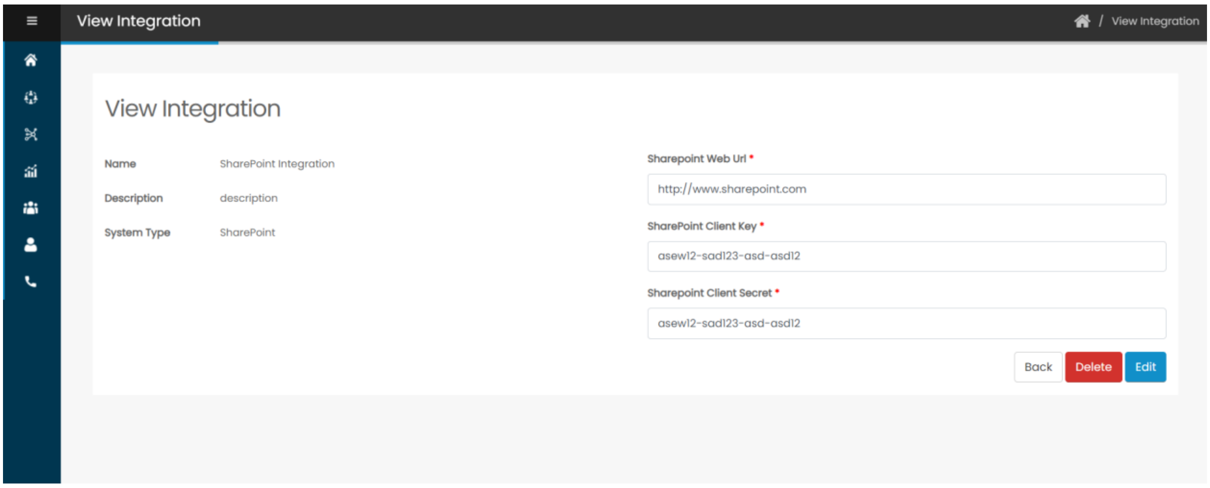
NOTE: Only Account Admins will be able to access the integration screen.



Step 2: Click on the name of the integration which you want to view



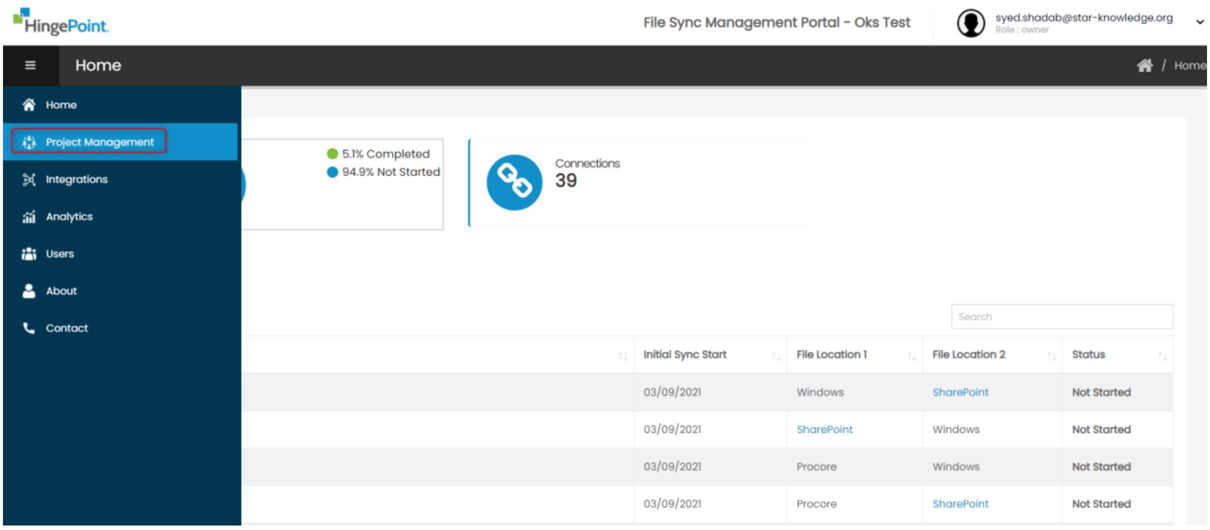
Step 3: The View Screen is displayed



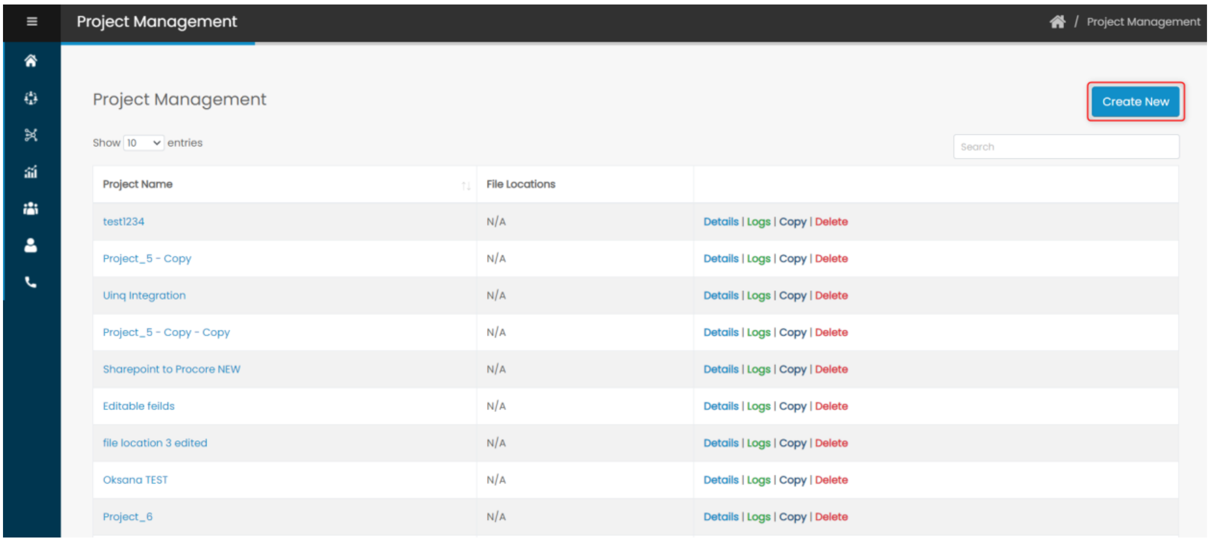
3. Project Management:

3.1 Create a Project:

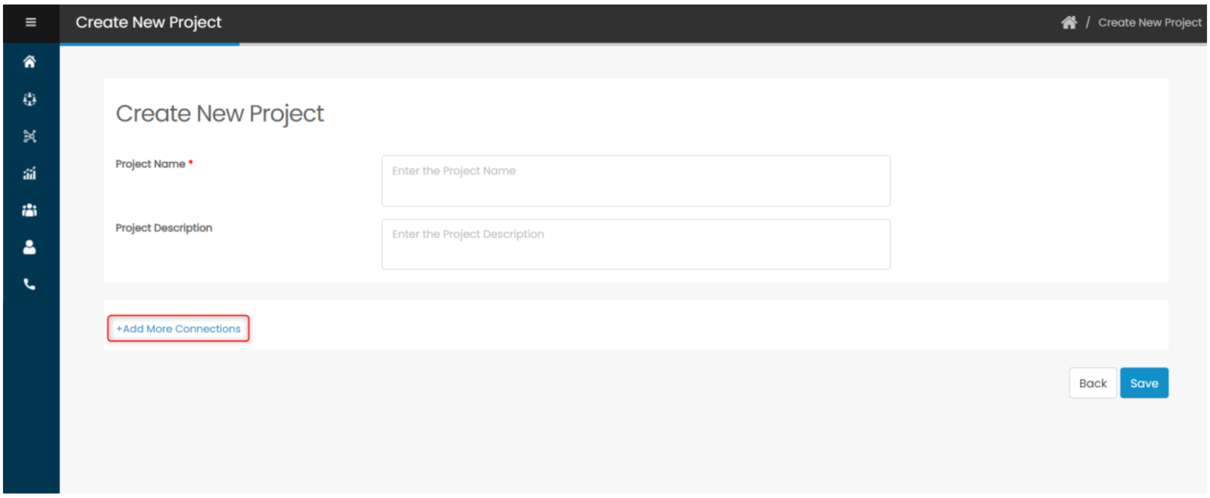
Step 1: Click on Project Management from the left navigation bar.



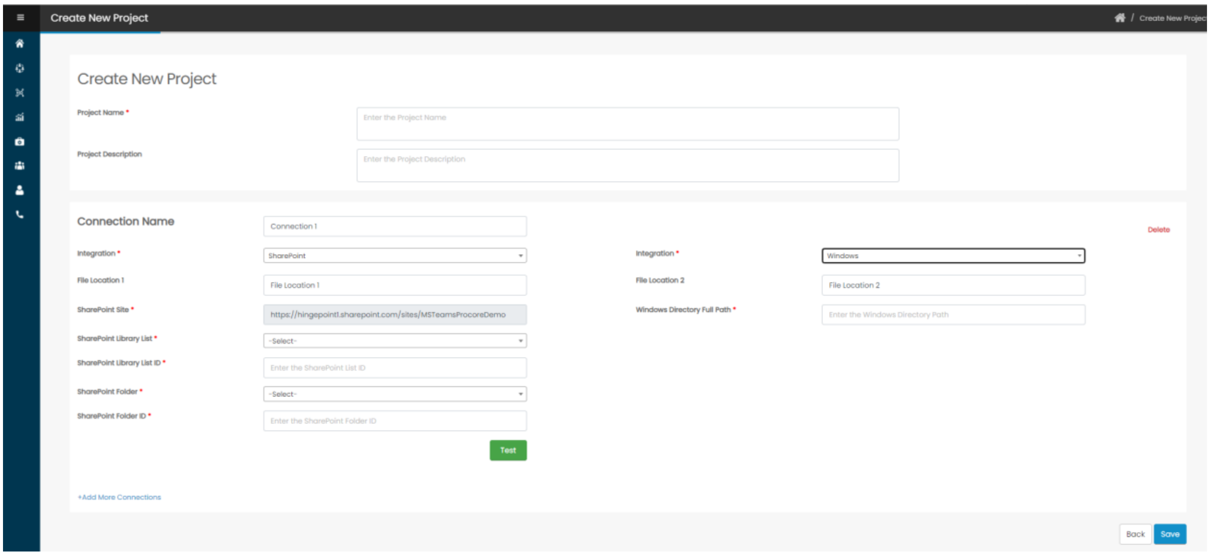
Step 2: Click on create new button.



Step 3: Project Create Screen is displayed. Click on add connection to add a connection to the data.

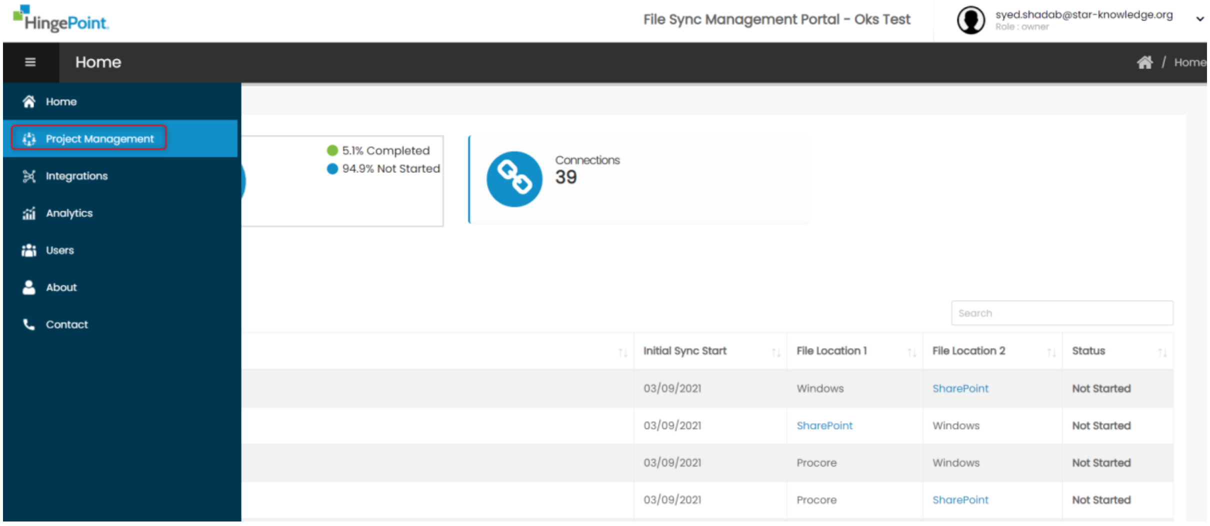


Step 4: Enter the data and click on save.

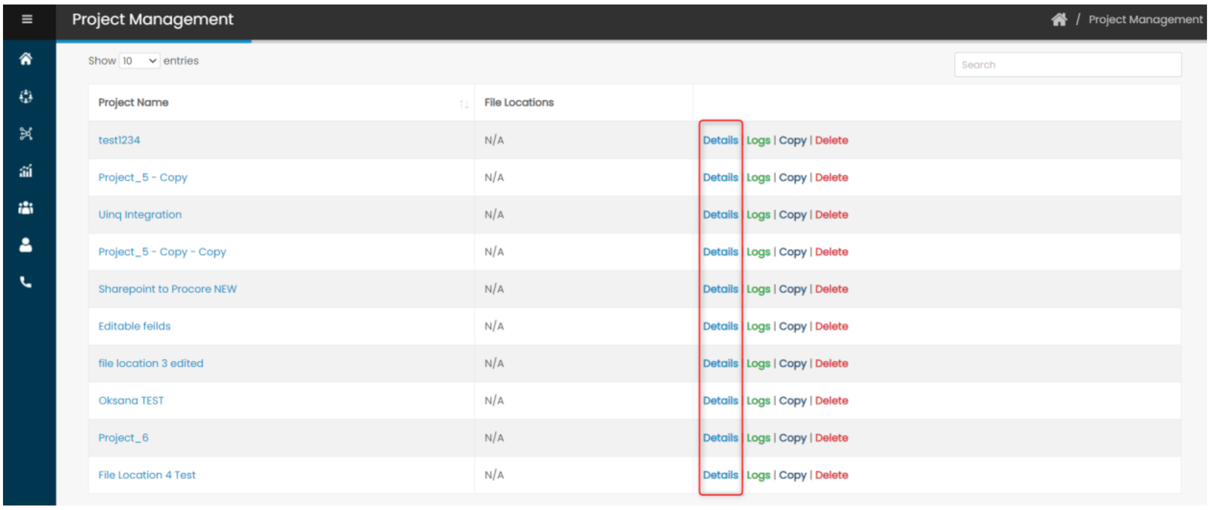


3.2 Edit a Project:

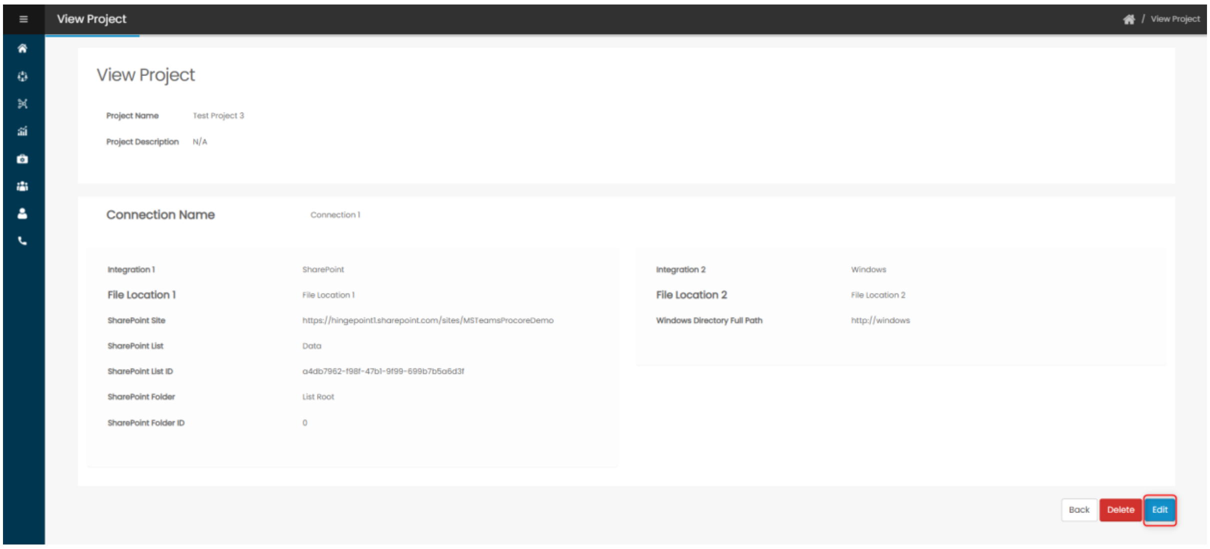
Step 1: Click on Project Management from the left navigation bar.



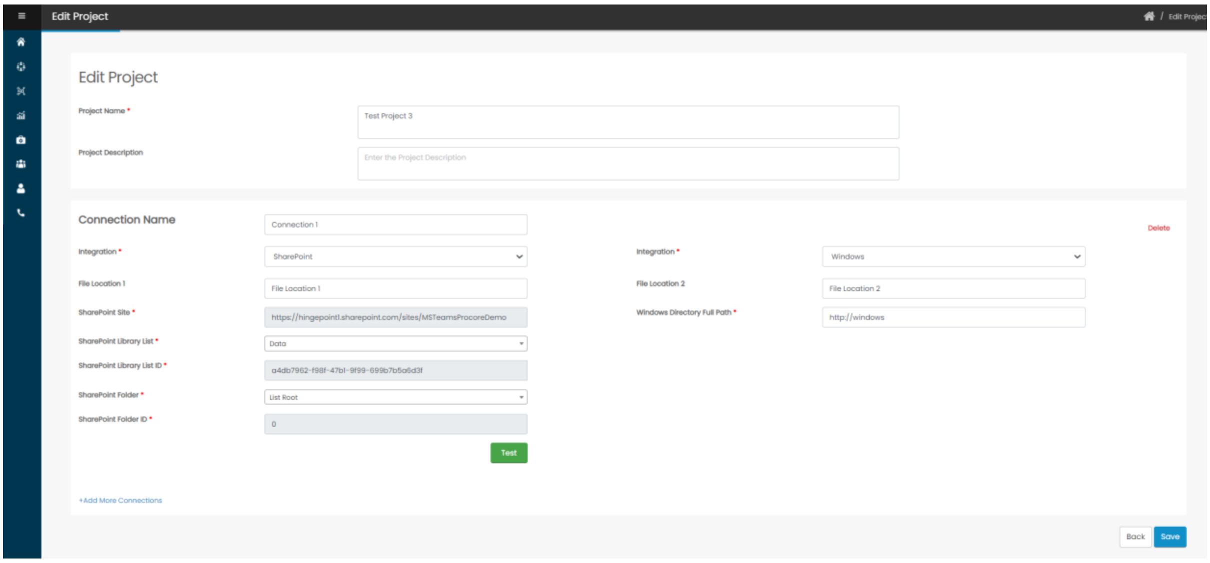
Step 2: Click on the Details button in the projects table for the project that needs to be edited.



Step 4: Details screen is displayed and click on edit.

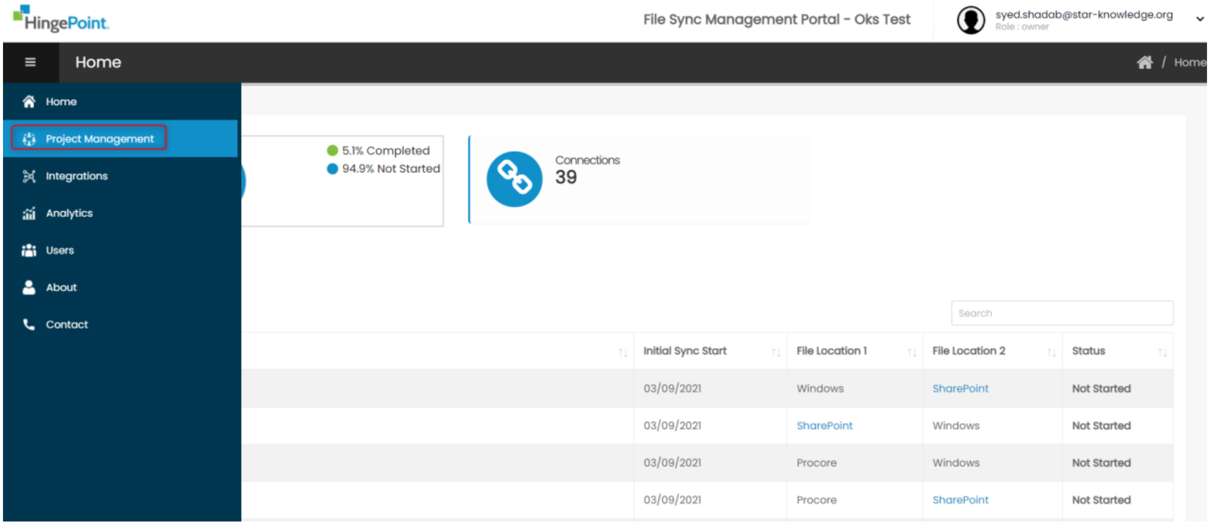


Step 3: Update the fields which needs to be updated and click on save.

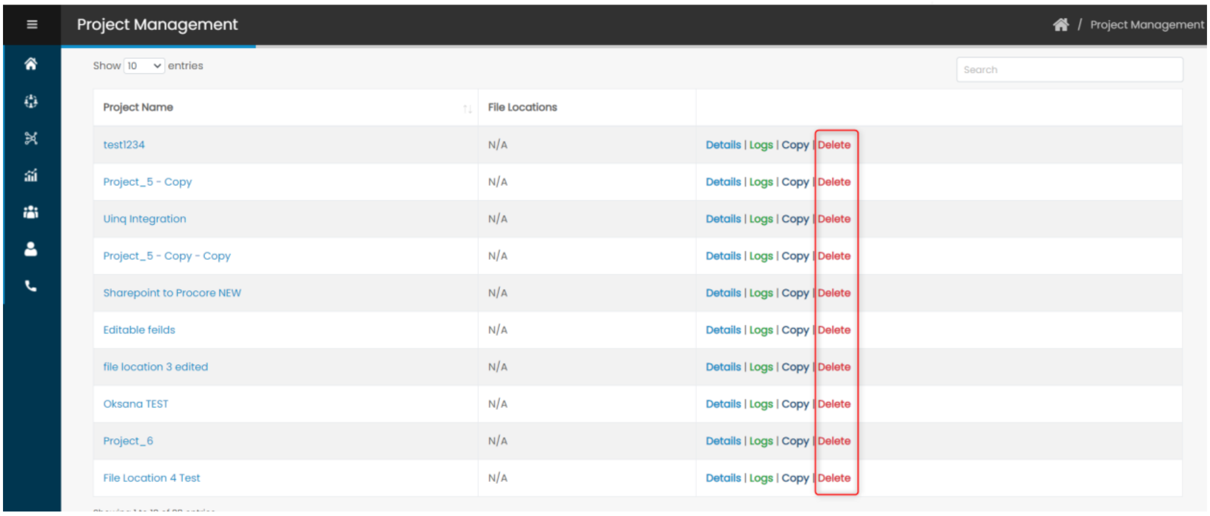


3.3 Delete a Project:

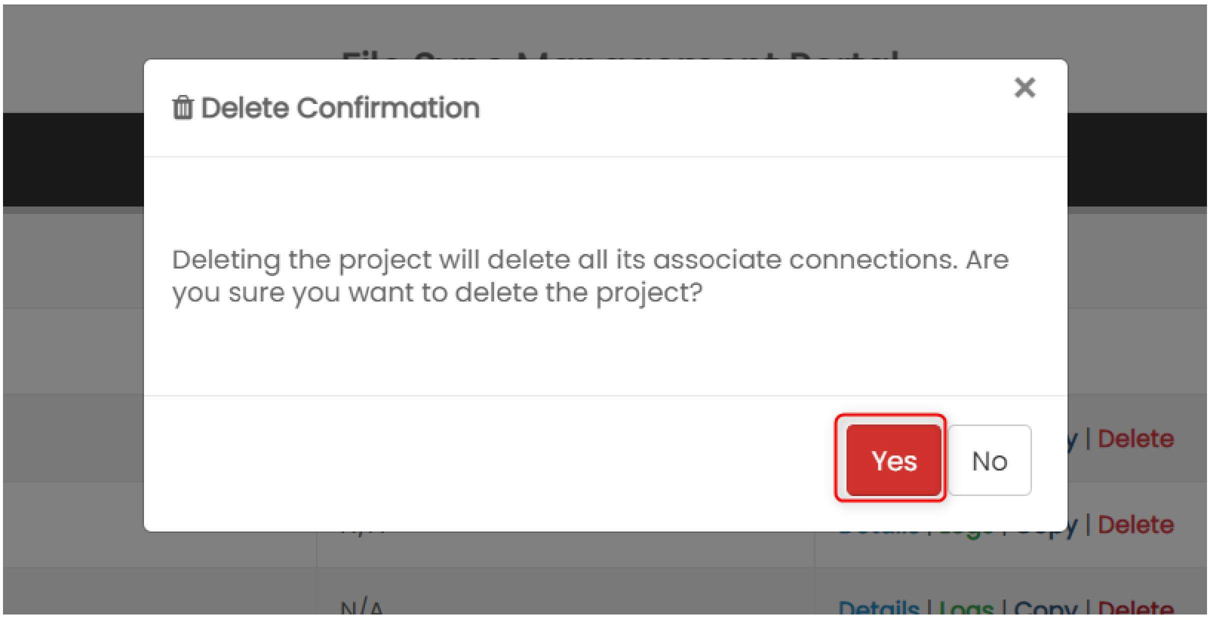
Step 1: Click on Project Management from the left navigation bar.



Step 2: Click on the delete button in the projects table for the project that needs to be deleted.

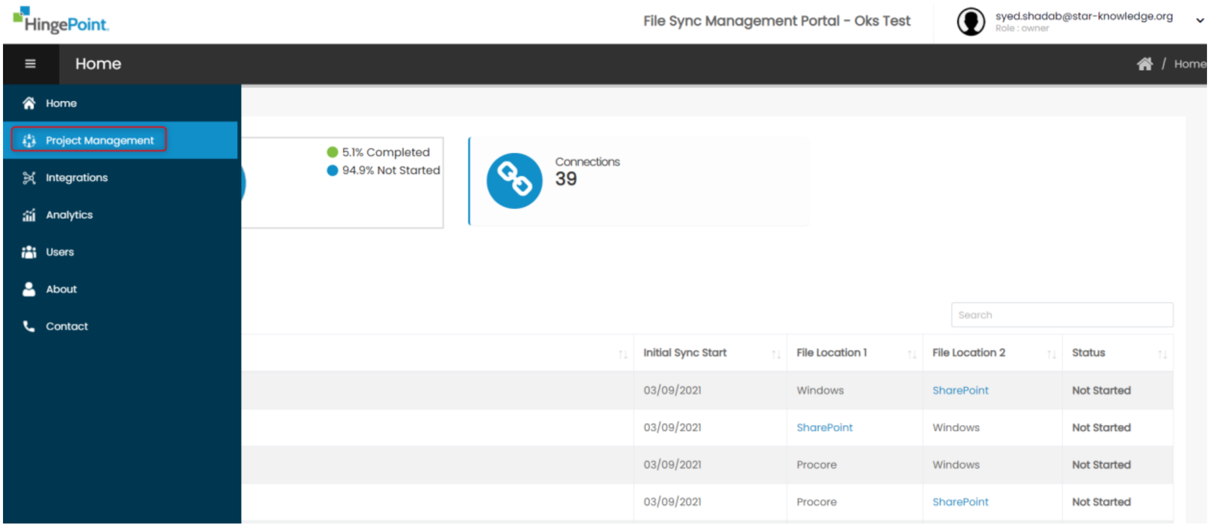


Step 3: Click on yes to delete the integration.

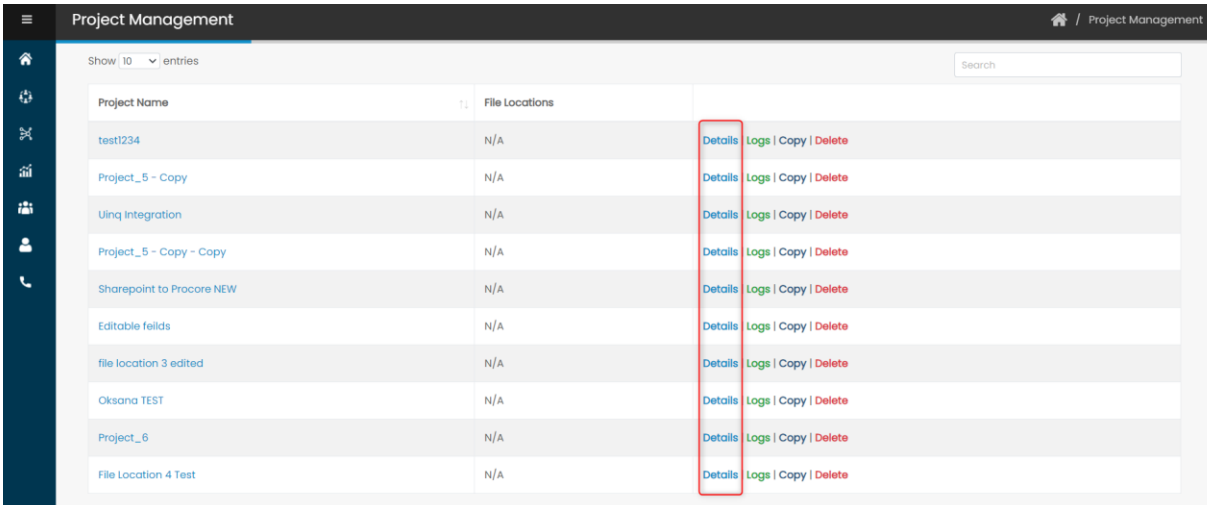


3.4 View a Project:

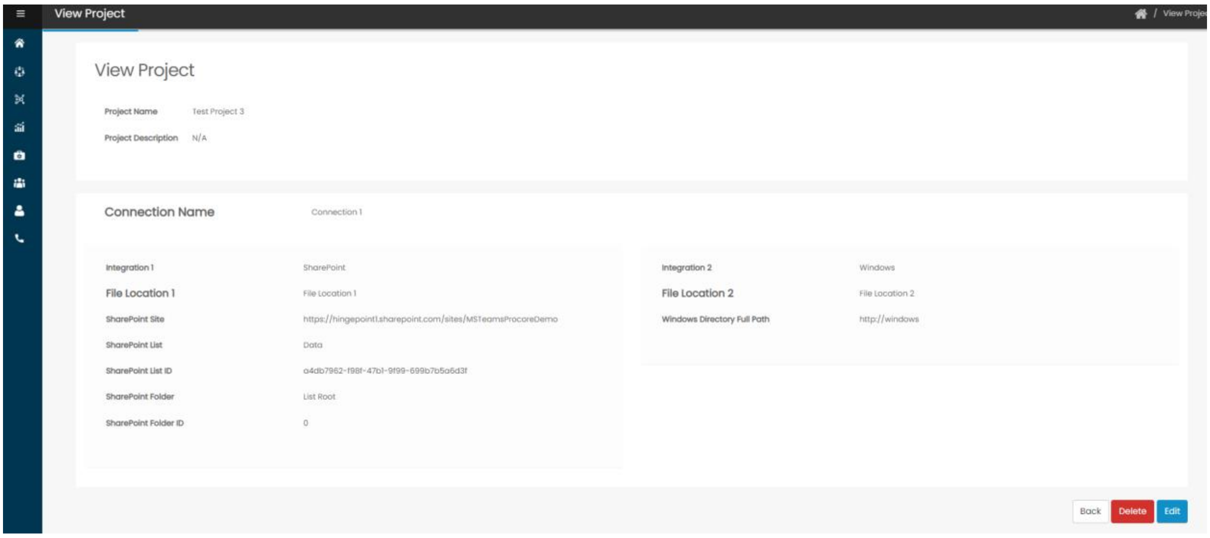
Step 1: Click on Project Management from the left navigation bar.



Step 2: Click on the details button in the projects table for the project that needs to be viewed.

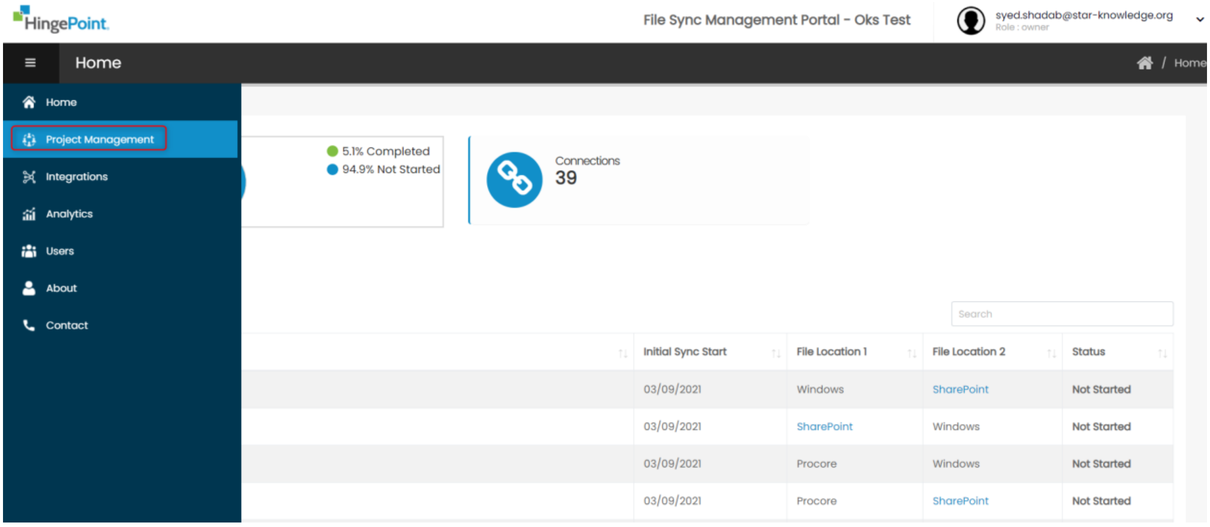


Step 3: Details Screen is displayed.

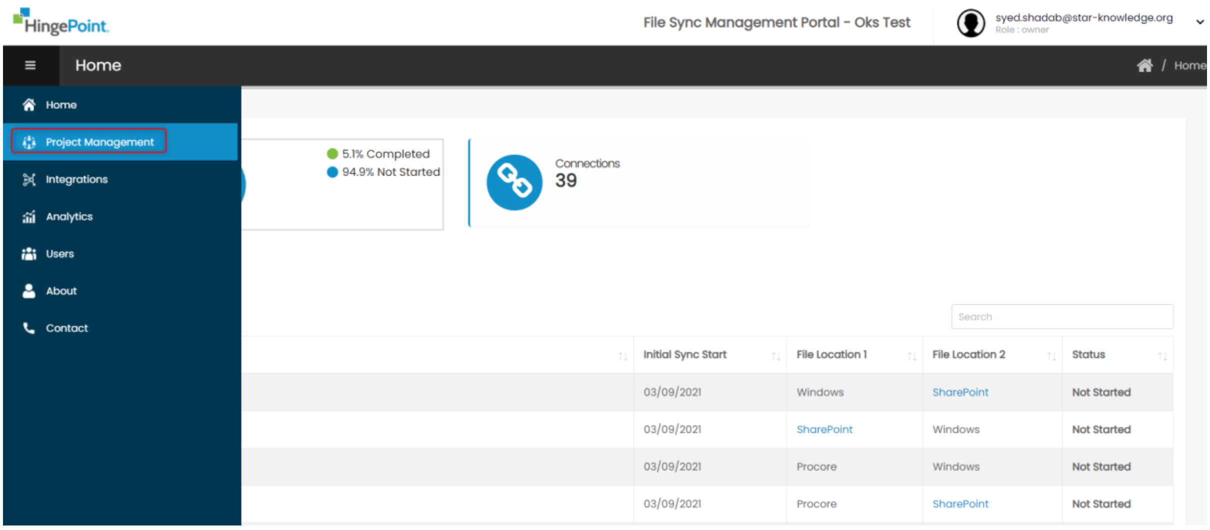


3.5 Activate a Sync:

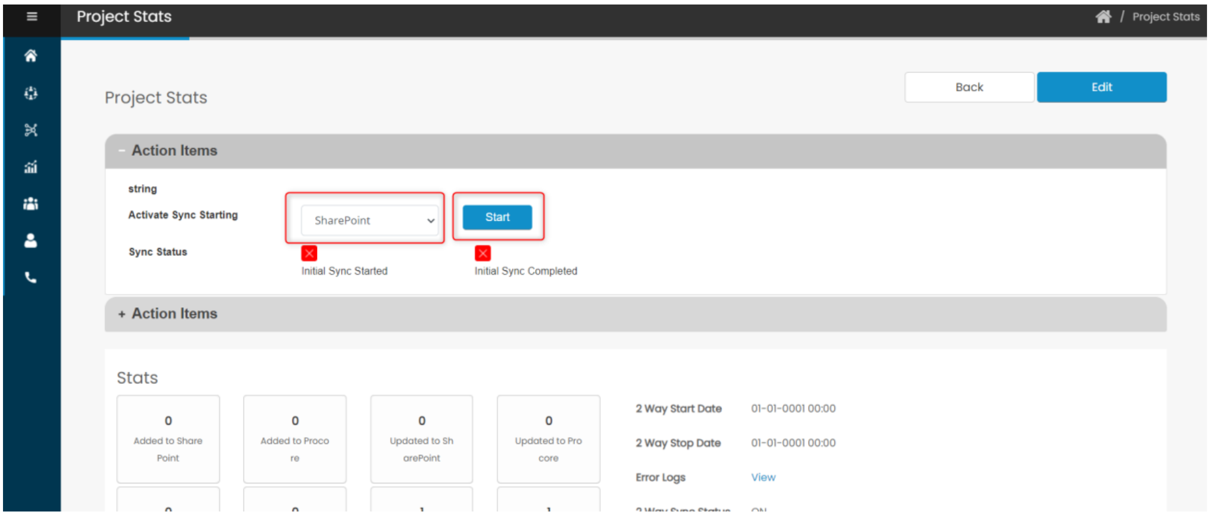
Step 1: Click on Project Management from the left navigation bar.



Step 2: Click on the name of the project in the project tables whose sync you want to activate.

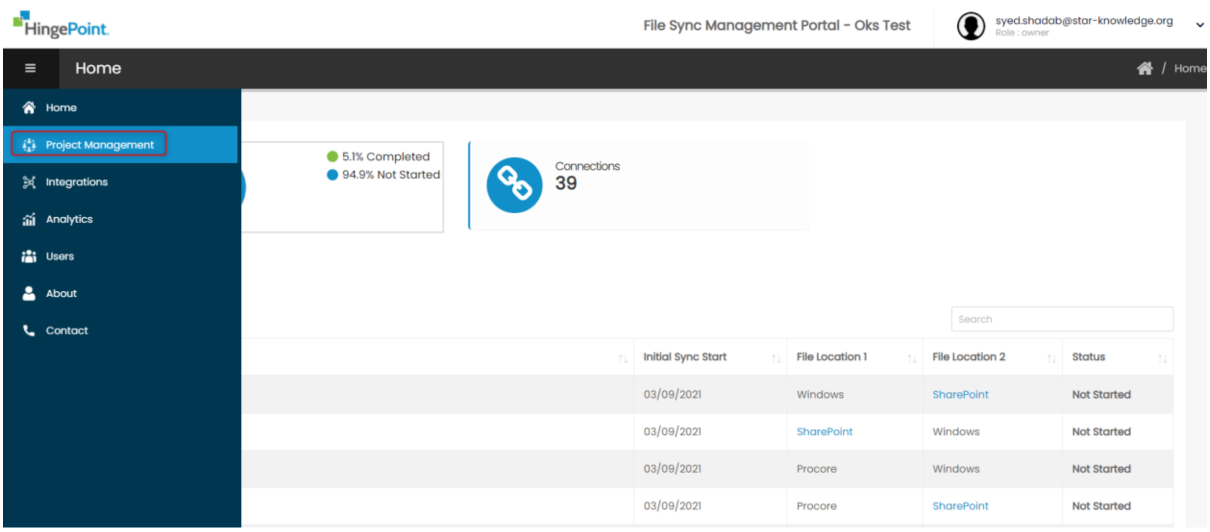


Step 3: the project stats screen is displayed. Select the endpoint for which you want to activate the sync and click on start.

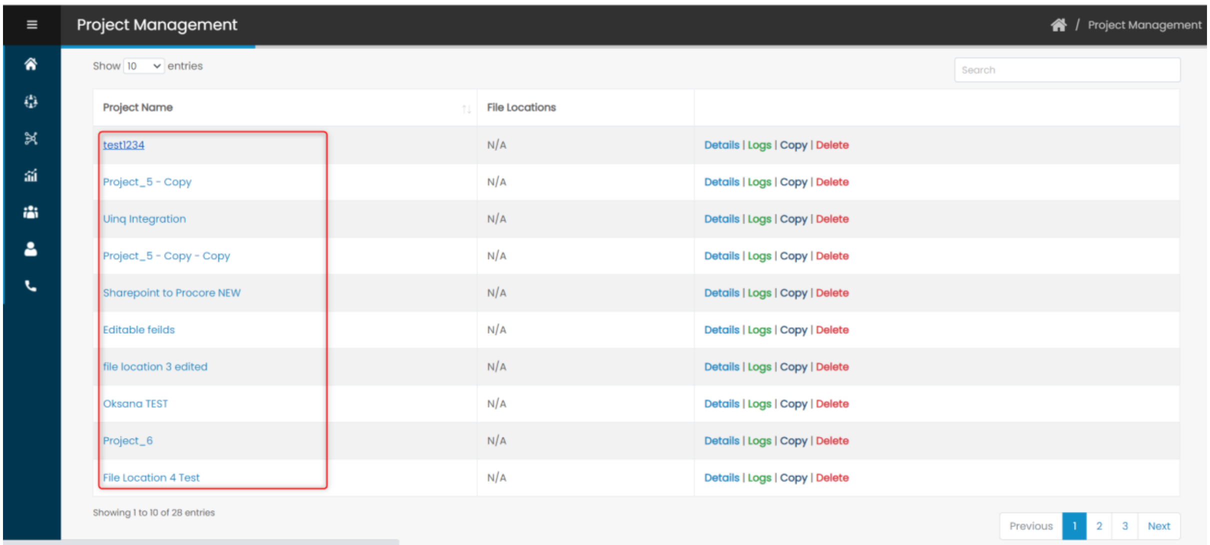


3.6 Deactivate a Sync:

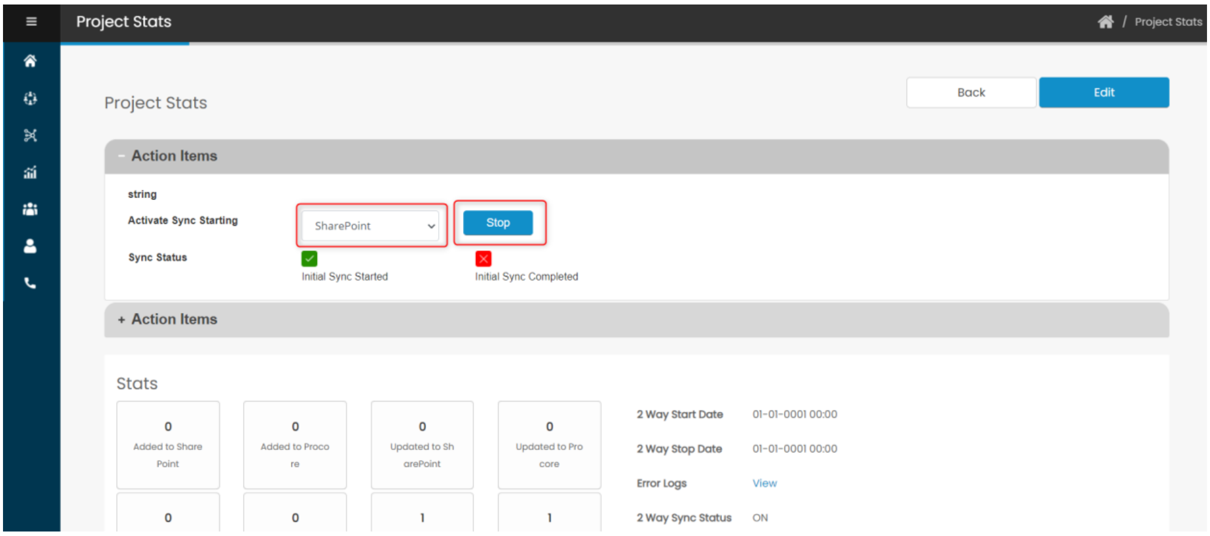
Step 1: Click on Project Management from the left navigation bar.



Step 2: Click on the name of the project in the project tables whose sync you want to deactivate.



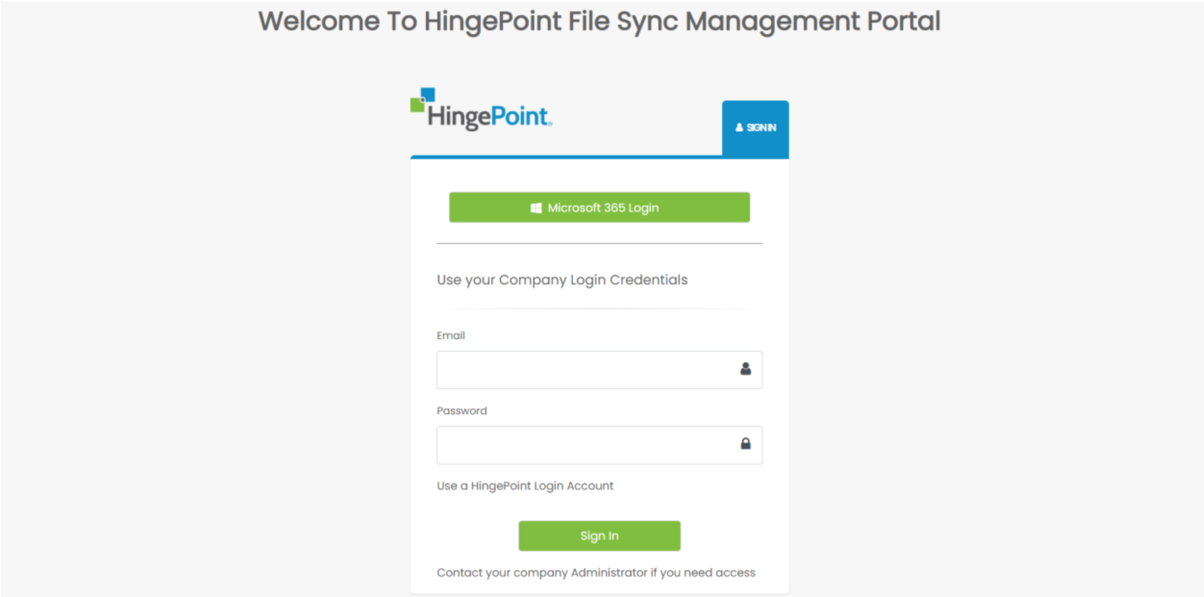
Step 3: the project stats screen is displayed. Select the endpoint for which you want to deactivate the sync and click on stop.



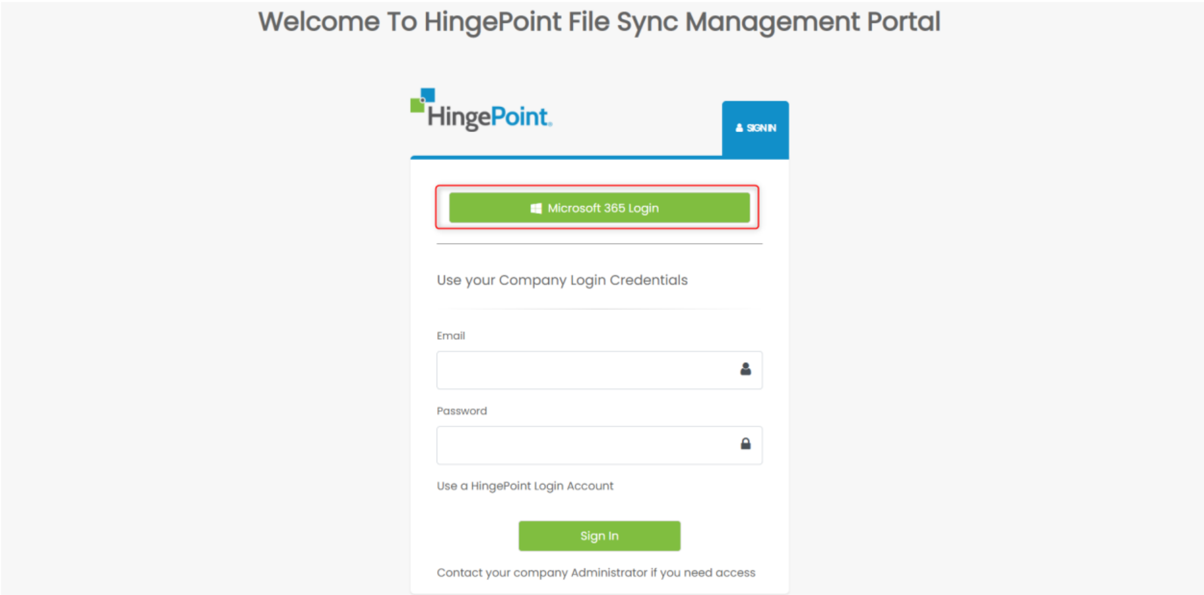
4. Users:

4.1 Create a User:

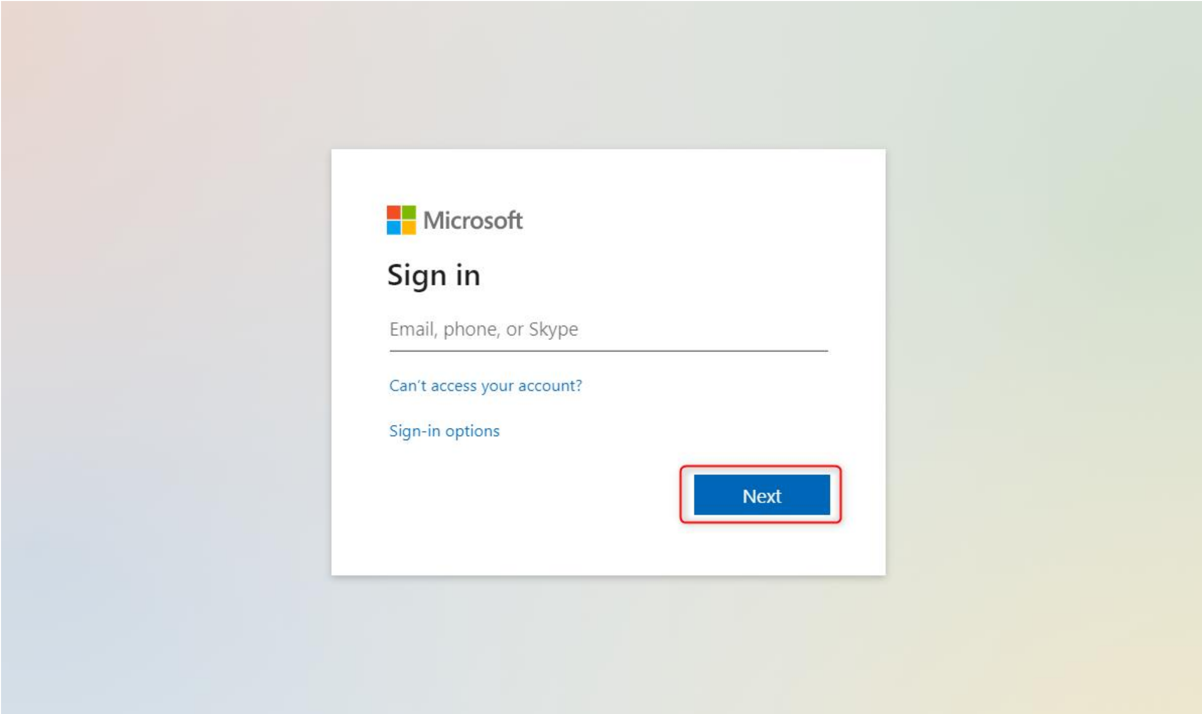
Step 1: Navigate to Management Portal site using the https://filesync.hingepoint.com/



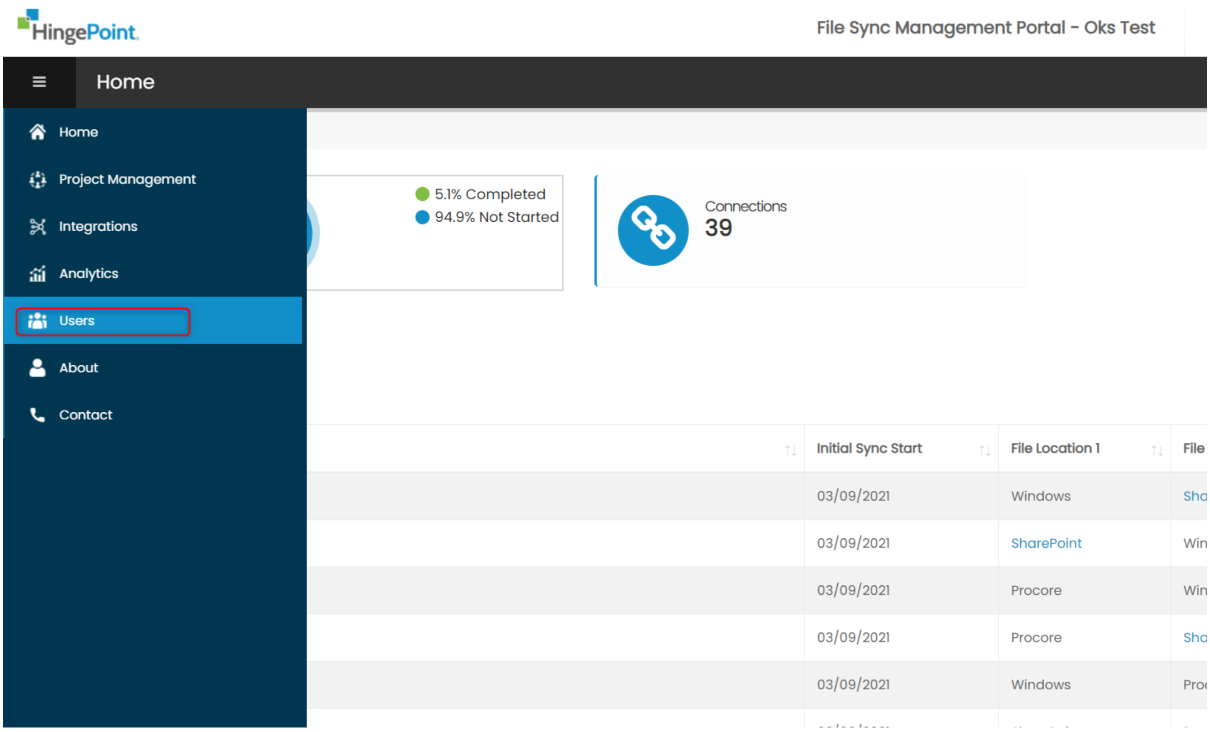
Step 2: Click on Use Microsoft button to login with your Microsoft account.



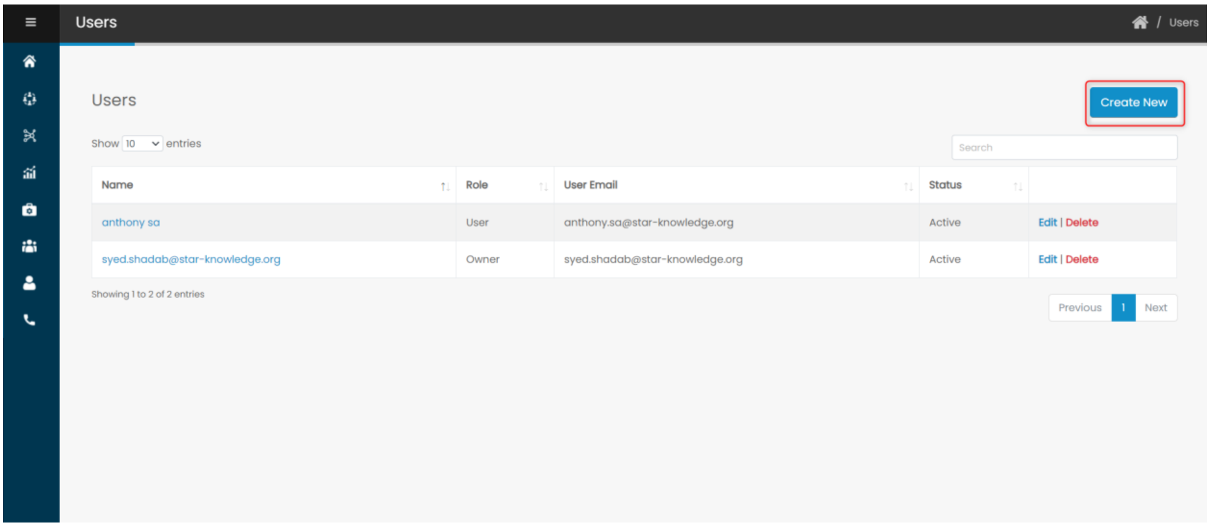
Step 3: Only Super Admin and Account Admin who has the access to the application can create Users. Enter your super admin or account admin credentials and click on next.



Step 4: Navigates to the homepage. Select "Users" from the left navigation menu.



Step 5: Navigates to the User page. Click on create to create a user.

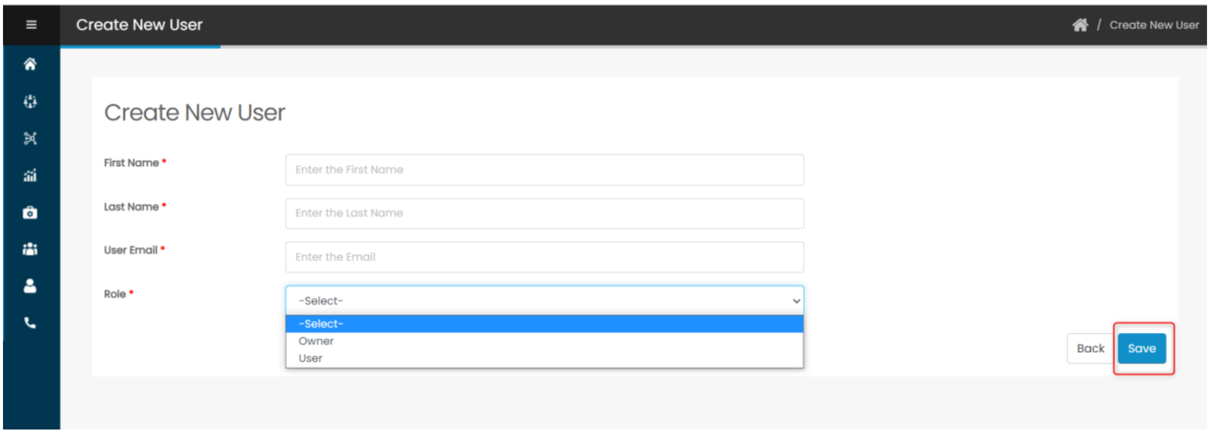


Step 6: Enter the required details and click on save

NOTE:

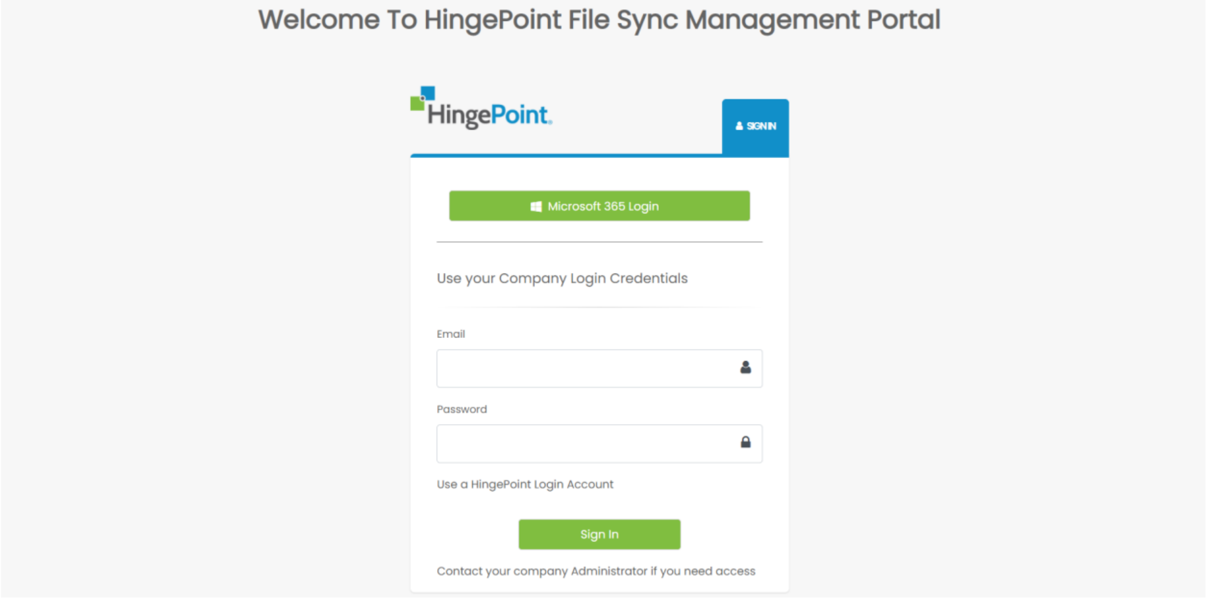
1 Selecting Role as admin will create user with Account Admin role.

2. Selecting Role as User will create user with Account user role.

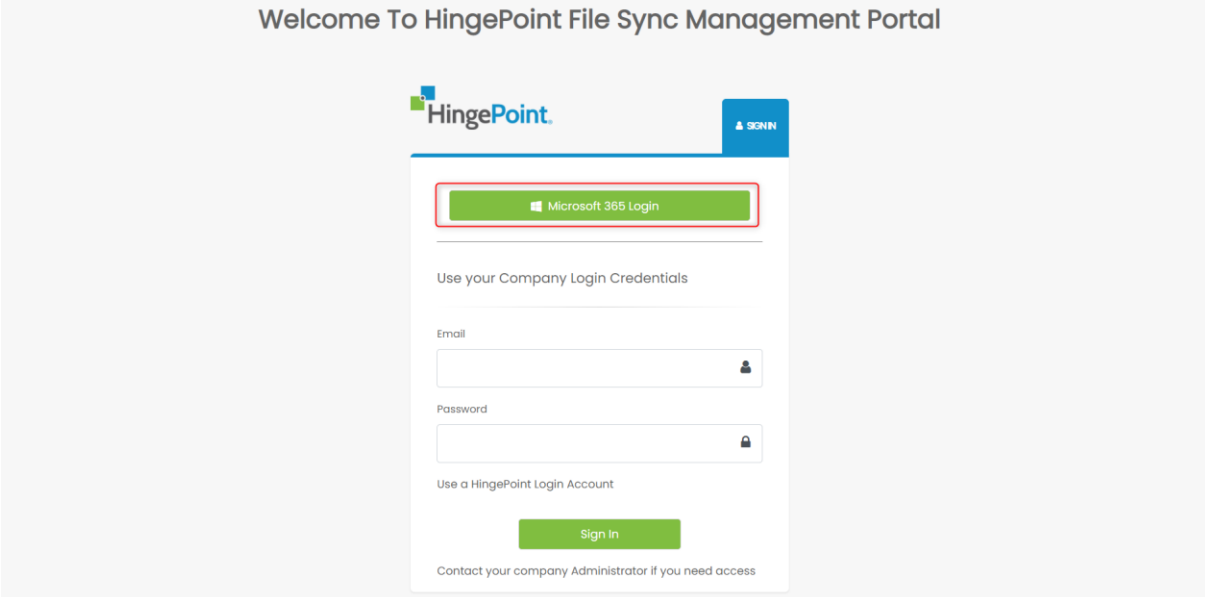


4.2 Edit a User:

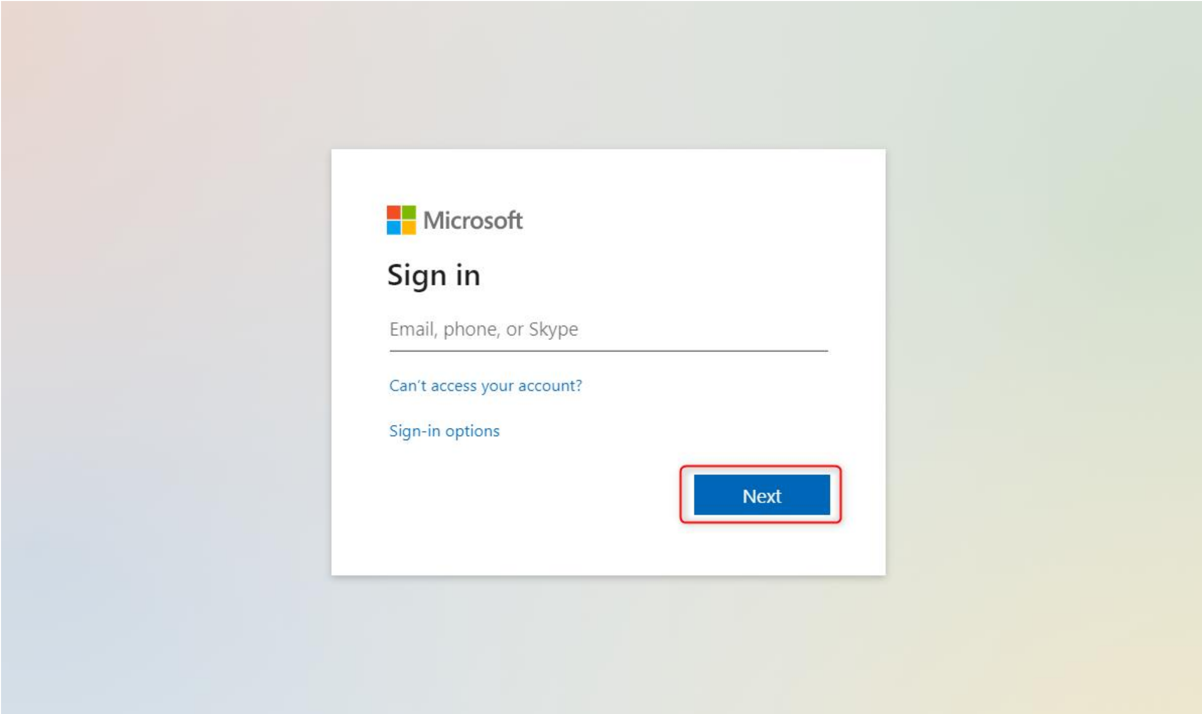
Step 1: Navigate to Management Portal site using the https://filesync.hingepoint.com/



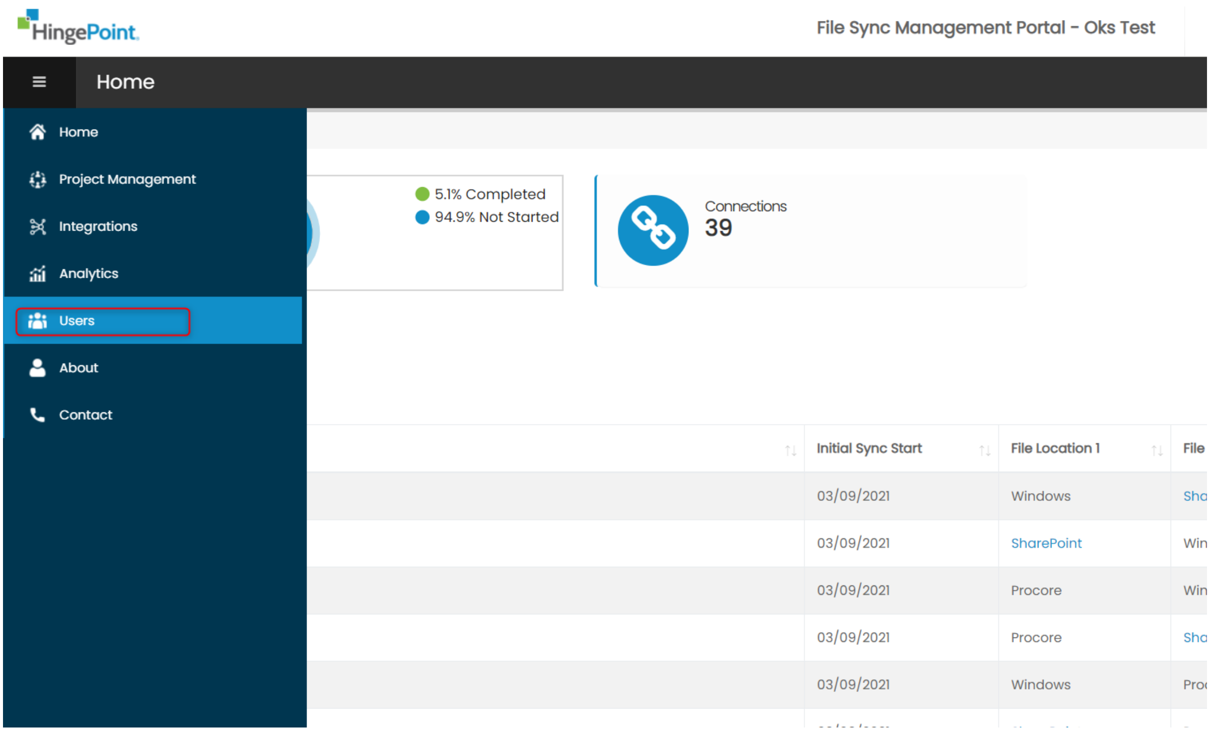
Step 2: Click on Use Microsoft button to login with your Microsoft account.



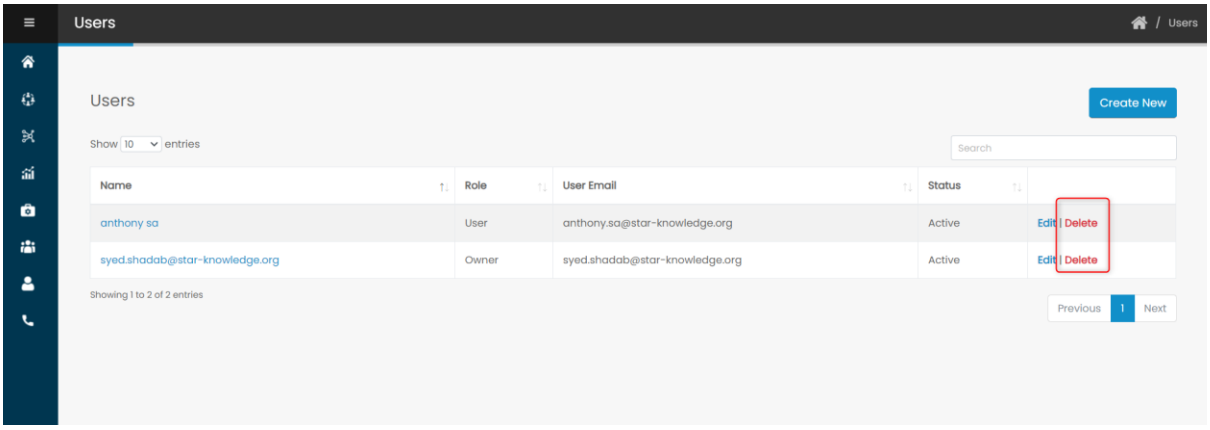
Step 3: Only Super Admin and Account Admin who has the access to the application can edit Accounts. Enter your super admin or account admin credentials and click on next.



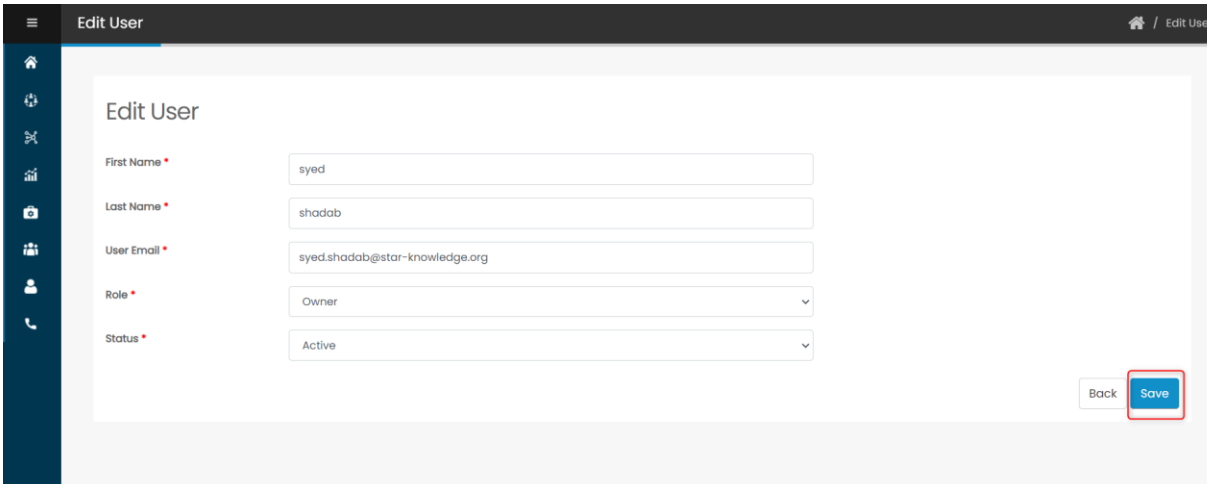
Step 4: Navigates to the homepage. Select "Users" from the left navigation menu.



Step 5: Navigates to the User page. Click on edit button of the user you want to edit.

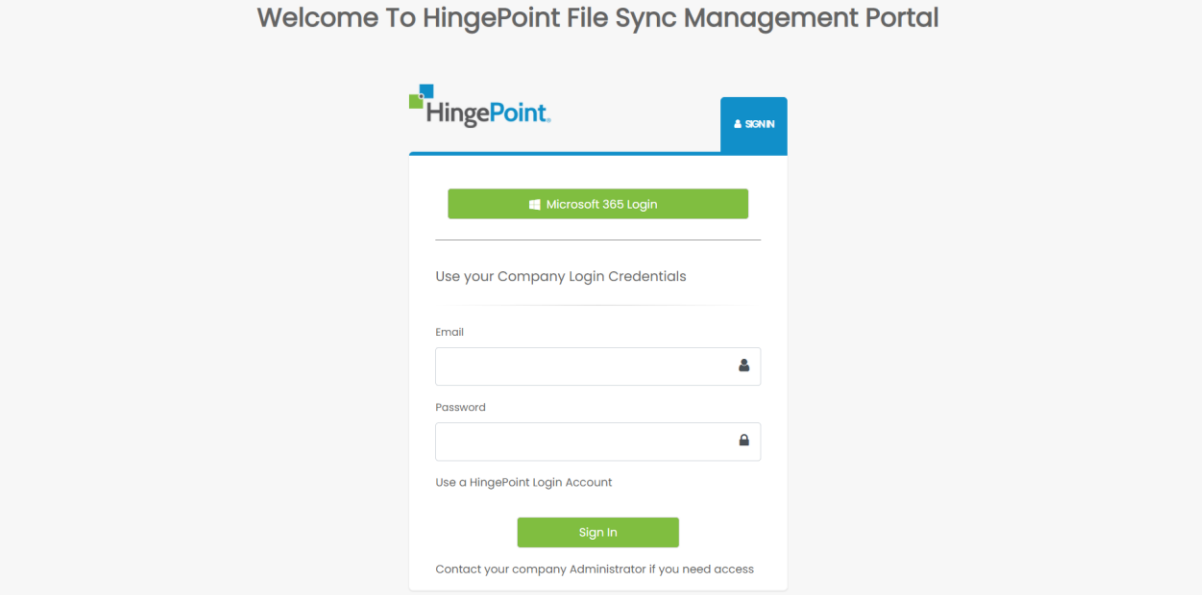


Step 6: Update the fields and click on save.

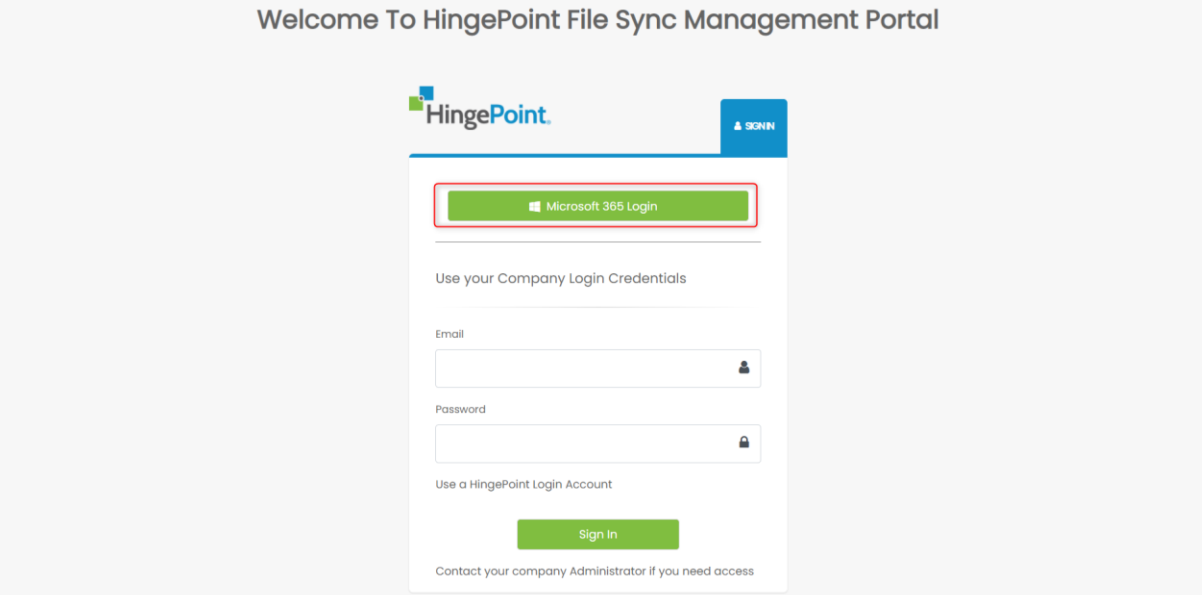


4.3 View a User:

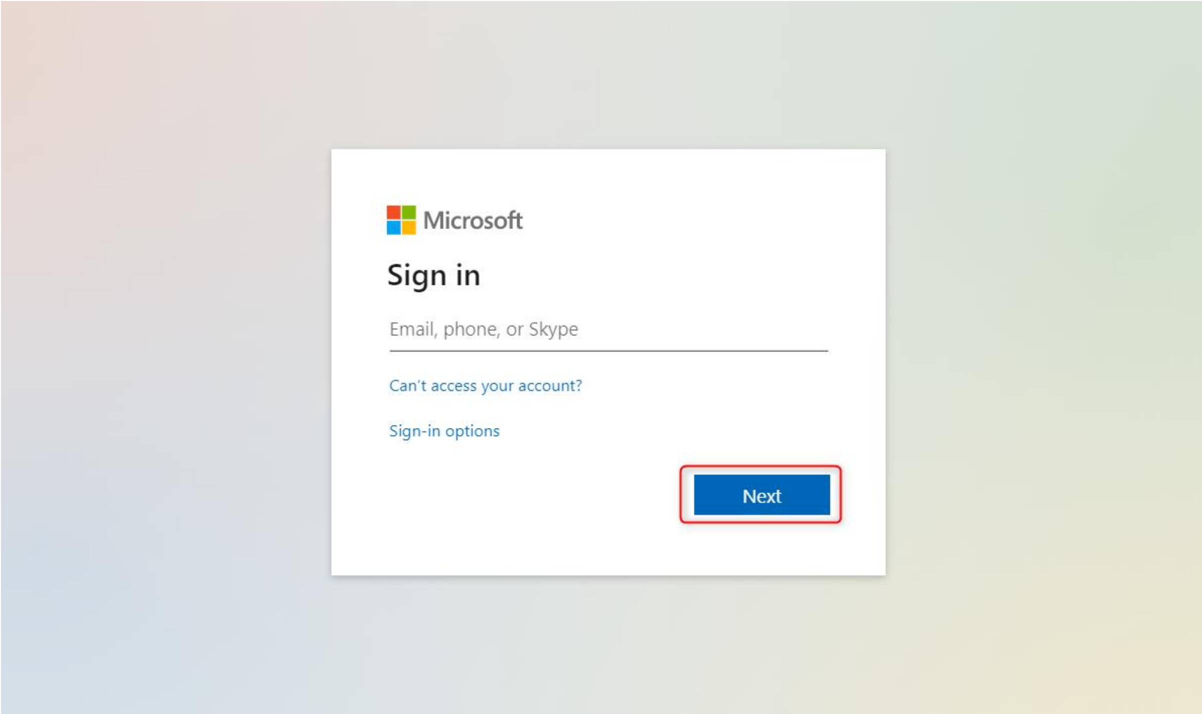
Step 1: Navigate to Management Portal site using the URL https://filesync.hingepoint.com/



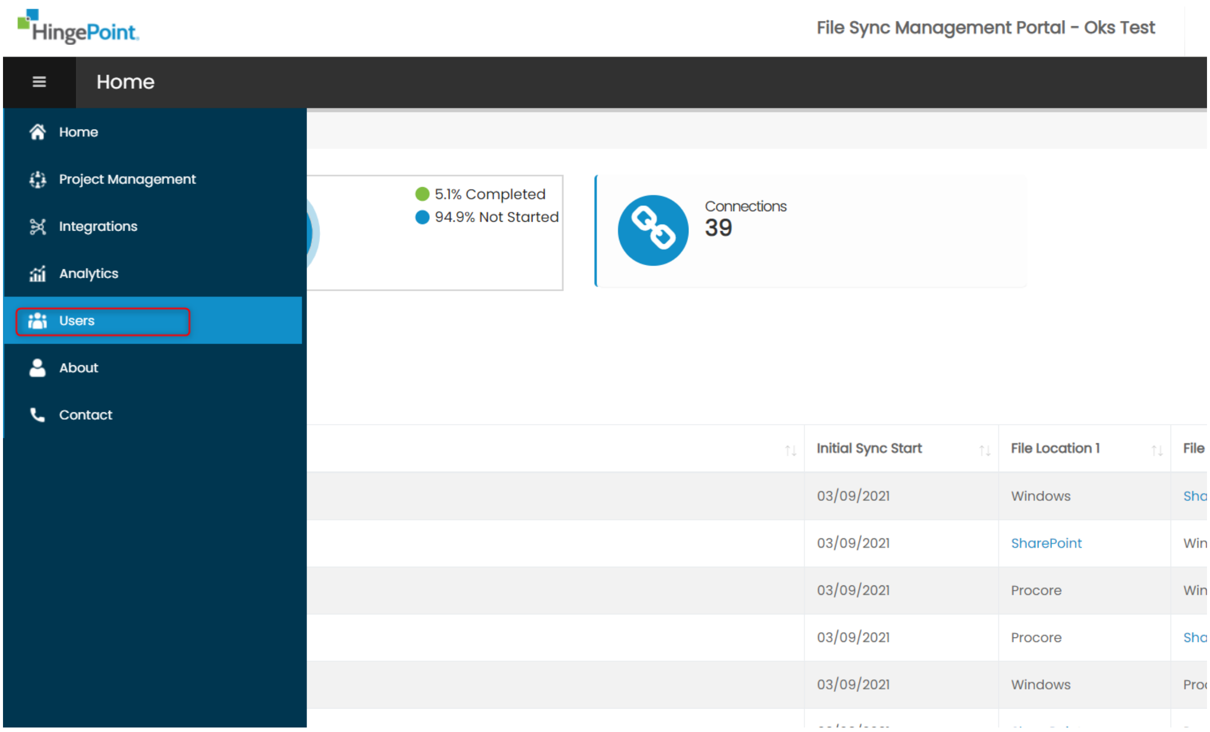
Step 2: Click on Use Microsoft button to login with your Microsoft account.



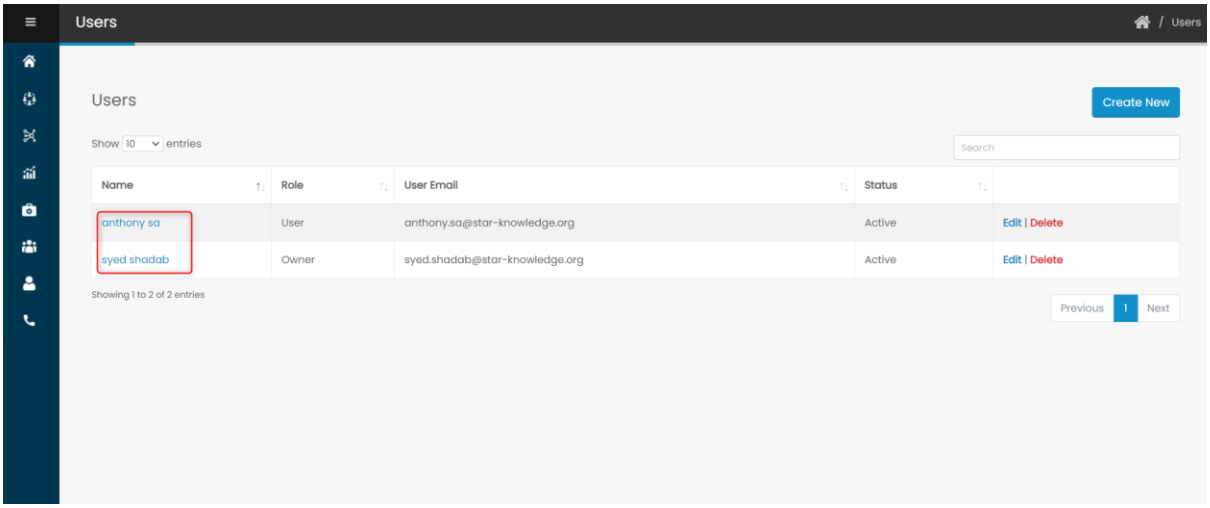
Step 3: Only Super Admin and Account Admin who has the access to the application can view Users. Enter your super admin or account admin credentials and click on next.



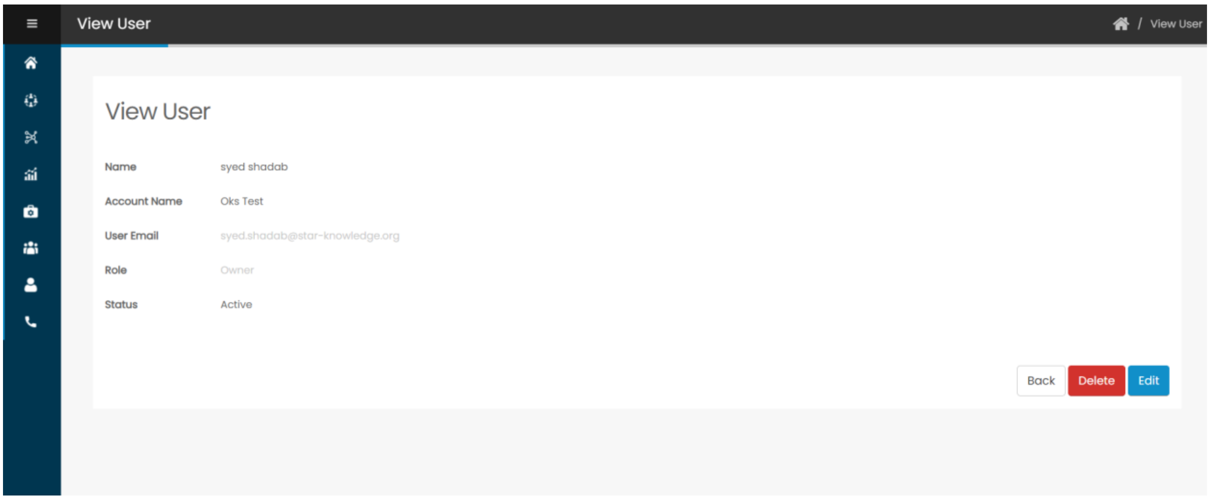
Step 4: Navigates to the Home Page. Select "Users" from the left navigation menu.



Step 5: Navigates to the User page. Click on name of the user you want to view.

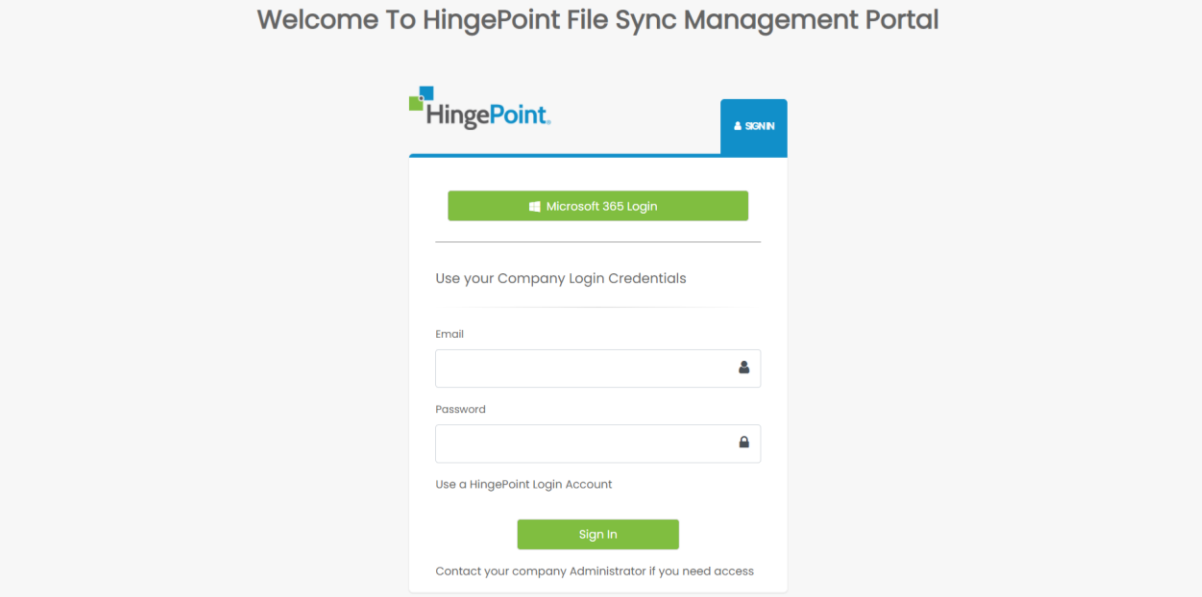


Step 6: The user is displayed.

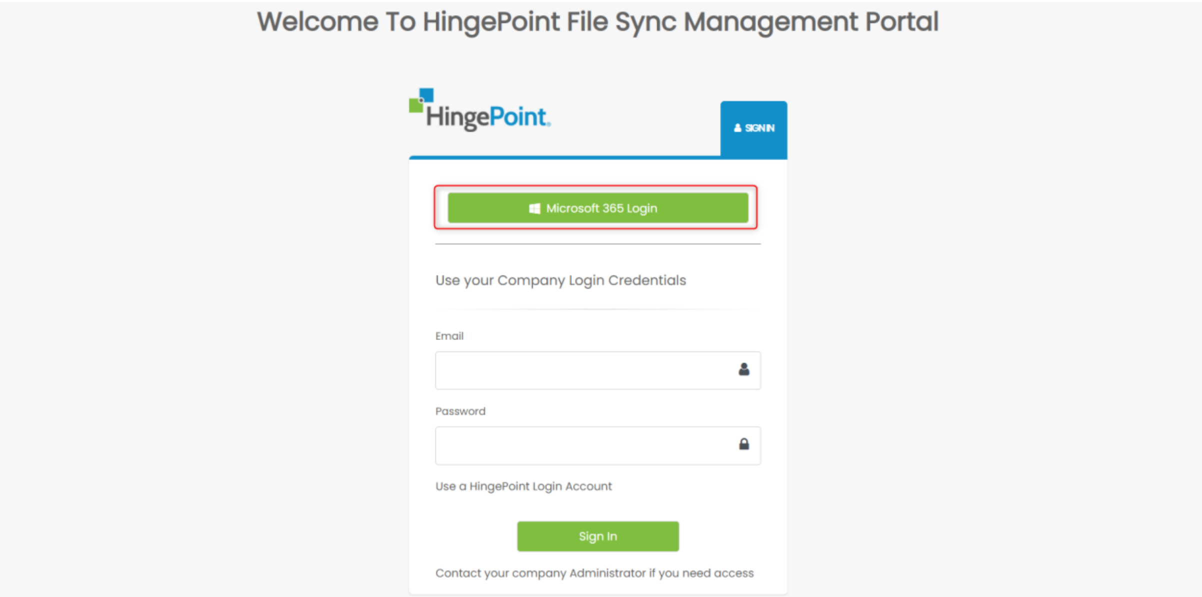


4.4 Delete a User:

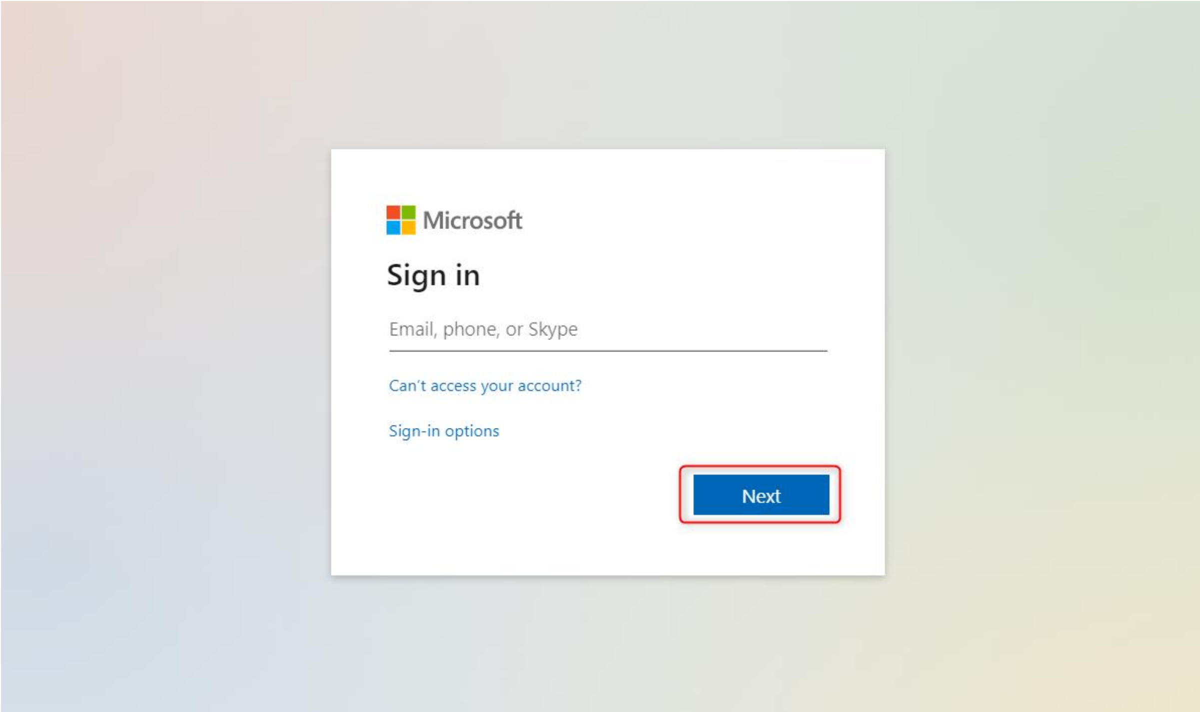
Step 1: Navigate to Management Portal site using the URL https://filesync.hingepoint.com/



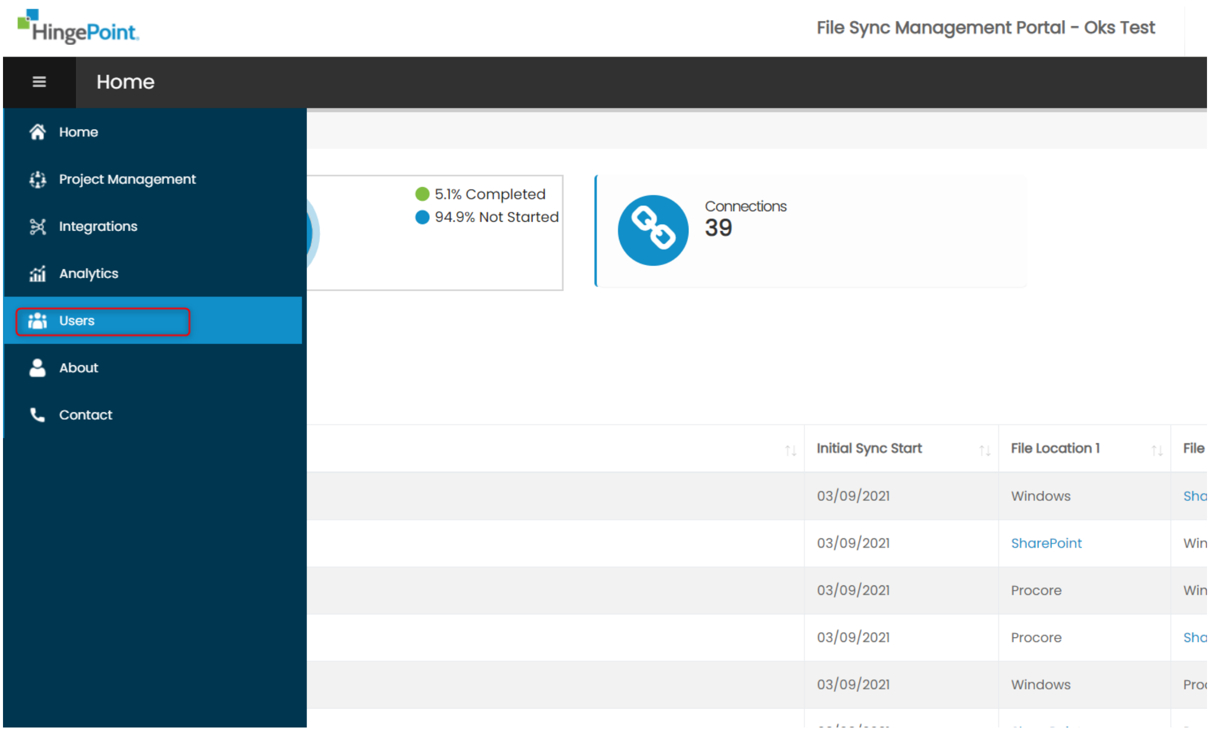
Step 2: Click on Use Microsoft button to login with your Microsoft account.



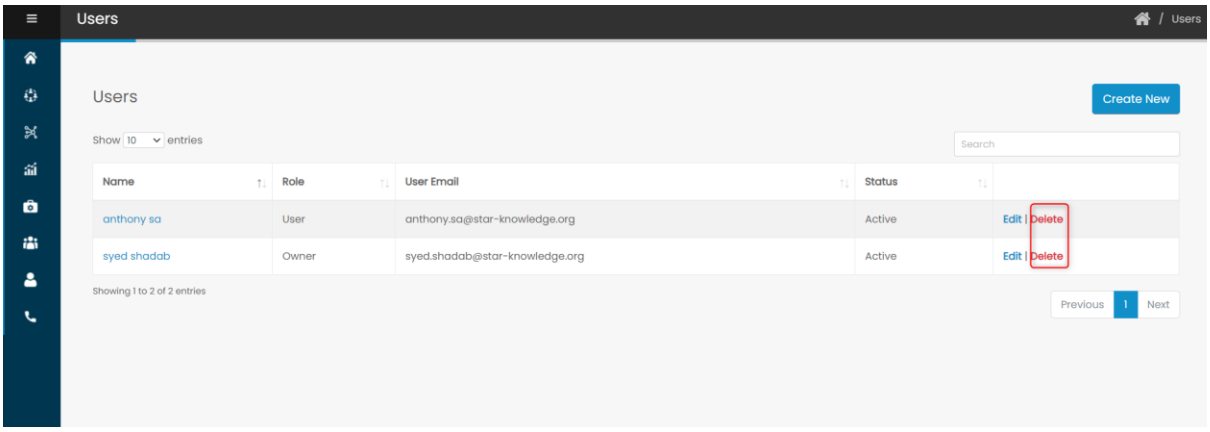
Step 3: Only Super Admin and Account Admin who has the access to the application can delete users. Enter your super admin or account admin credentials and click on next.



Step 4: Navigates to the home page. Select "User" from the left navigation menu.



Step 5: Navigates to the User page. Click on delete button of the account you want to delete.



Step 6: Click yes to delete the user.