

## Accept or Reject a Budget for Export to Sage 300 CRE

### Objective

To accept (or reject) a budget that has been sent to the ERP Integrations tool for acceptance for export to the [integrated ERP system](#) by an [accounting approver](#).

### Background

After a user sends a project's budget to the ERP Integrations tool, your company's designated accounting approver must 'Accept' the data before the system will export it to the integrated ERP system. If there is at least one (1) budget line item in the ERP Integrations tool awaiting acceptance, Procore will send approver(s) an automated email notification with the subject line 'ERP Integrations Daily Summary'. This email is sent one per day until an 'Accept' or 'Reject' response is submitted. The email also lists all of the budget items awaiting acceptance.

To submit a response, the accounting approver has these options in the ERP Integrations tool:

- **Accept.** Accepts the budget and exports the data to the integrated ERP system.  
OR
- **Reject.** Rejects the budget. This removes the data from the ERP Integrations tool and unlocks it in the Budget tool, so it can be corrected and then re-sent to the ERP Integrations tool for accounting acceptance.

To learn how to accept or reject a budget, see the Steps below.

### Things to Consider

- **Required User Permission:**
  - 'Standard' or 'Admin' level permission on the ERP Integrations tool.  
AND
  - The person's account must be granted the 'Can Push to Accounting' privilege in the Company Directory. To request to enable this privilege, submit a request to your Procore point of contact. This must be enabled for you by Procore.
- **Prerequisites:**
  - The company account must be integrated with Sage 300 CRE. See [Sage 300 CRE Connector: Setup Guide](#).
  - The Budget tool must be an active tab on the project.
- **Restrictions:**

After exporting a Procore budget to Sage 300 CRE, the following restrictions are in place:

  - You no longer be permitted to import Sage 300 CRE budget or job data into Procore.



- You will not be permitted to unlock the Procore project's Budget tool (see [Unlock a Budget](#)), unless the following is true:
  - The exported entries have been manually posted to your Sage 300 CRE system using the Job Cost function. See your Sage Help system for instructions.
  - The Sage data is synced with the hh2 Cloud Service and then back to Procore. See [How often can I sync data between Sage and Procore?](#)

*Note:* To confirm that the data is synced between the systems (i.e., the original budget amount should appear in Procore's Job Cost Report. See View the [Sage 300 CRE Job Cost Report](#)).

## Steps

### Review the Budget

1. Navigate to the company's **ERP Integrations** tool.  
The ERP system's Integration page appears.
2. Click the **Budget** subtab.
3. Click **Ready to Export** in the 'Filter Estimates By' menu.



This reveals the 'Budgets Ready to Be Exported' list.

4. Review the accepted budget items to ensure the data is ready for export. Then accept or reject the budget as described below.

### Accept a Budget

1. Locate the desired budget in the 'Budgets Ready to be Exported' list.
2. Click **Details**.



• SAGE 300 CRE INTEGRATION

Back Cost Center & Categories Windows Jobs Sub Jobs Budgets Commitments Change Budgets Export Data

• Check if Budget has been approved. If not, click on the 'Approve' button.  
 • Check if Budget has been approved. If not, click on the 'Approve' button.  
 • Check if Budget has been approved. If not, click on the 'Approve' button.

BUDGETS READY TO BE EXPORTED TO SAGE 300 CRE

Project	Budget Details	Commitments
100 - Food Warehouse	Original Budget: \$1,000,000.00	Approved Budget: \$1,000,000.00

Cancel Export

This opens a Budget Updates window that shows the Cost Code, Category, Original Budget, Budget Changes, and Revised Estimate.

Budget Updates

NW Food Warehouse

Cost Code	Category	Original Budget	Budget Changes	Revised Estimate
<b>1 GENERAL CONDITIONS</b>				
1-040 Coordination	I	\$1,895.41	-\$4,300.00	-\$4,404.59
1-040 Coordination	L	\$41,739.17	\$4,300.00	\$30,239.17
1-063 Permits - General	O	\$30,239.00	-\$1,000.00	\$19,239.00
1-118 Temporary Utilities	M	\$2,186.96	\$1,000.00	\$2,186.96
<b>Total</b>		<b>\$44,840.54</b>	<b>\$0.00</b>	<b>\$44,840.54</b>

- Click the 'x' to close the Budget Updates window.
- Choose **Accept**.

• SAGE 300 CRE INTEGRATION

Back Cost Center & Categories Windows Jobs Sub Jobs Budgets Commitments Change Budgets Add Costs

• Check if Budget has been approved. If not, click on the 'Approve' button.  
 • Check if Budget has been approved. If not, click on the 'Approve' button.  
 • Check if Budget has been approved. If not, click on the 'Approve' button.

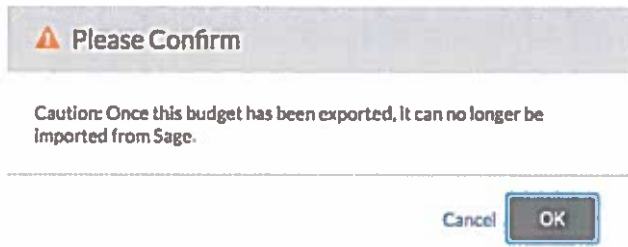
BUDGETS READY TO BE EXPORTED TO SAGE 300 CRE

Project	Budget Details	Commitments
100 - Food Warehouse	Original Budget: \$1,000,000.00	Approved Budget: \$1,000,000.00

Cancel Export

- Click **Export**.  
 This exports the budget to the integrated ERP system. A message appears to caution you that once the budget is exported, you will not be able to import the budget from your integrated ERP system.





6. Click **OK** to confirm the cautionary message.
7. After the export is complete continue with these tasks in your Sage 300 CRE system:
  - Manually post the exported entries in Sage using its Job Cost function (e.g., In Sage Job Cost, navigate to **Tasks > Post Entries**). See your Sage 300 CRE Help system for more information.
  - (Optional) In Sage, review your journal and verify that the estimate transactions have posted. Your hh2 account will sync the updated changes on its hourly schedule (see [How often can I sync data between Sage and Procore?](#)), after which, the ability to unlock the budget will become available. See [Unlock a Budget](#).

## Reject a Budget

1. Locate the desired budget in the 'Budgets Ready to be Exported' list.



2. Choose **Reject**.
3. In the text box that appears, type a brief reason for the rejection.
4. Click **Reject**.  
The following events occur:
  - The system removes the budget from the ERP Integrations tool and returns it to an editable state in the Budget tool.
  - The system sends an email notification to the person who created the budget (see [Set Up a Budget](#)) to alert the individual of the budget rejection.
  - The system also sends an email to the person who sent the budget to the ERP Integrations tool (see [Send a Budget to ERP Integrations for Accounting Acceptance](#)). Typically, this is the project manager.

## See Also

- [Export a Budget from ERP to Sage](#)

