Accept or Reject a Commitment for Export to Sage 300 CRE

Objective

To accept or reject a commitment that has been sent to the ERP Integrations tool for review by an accounting approver.

Background

After a user sends a commitment to the ERP Integrations tool for acceptance, an accounting approver can review the information as submit a response to the commitment as follows:

- **Accept**. Accepts the commitment data for export to Sage 300 CRE.
  OR
- **Reject**. Rejects the commitment data and returns it to the Commitments tool in an editable state. The data can then be corrected and re-sent to the ERP Integrations tool for accounting acceptance. See Send a Commitment to ERP Integrations for Accounting Acceptance.

Note: If there is at least one commitment in the ERP Integrations tool that's awaiting accounting acceptance, Procore sends an automated email notification to the people at your company who are designated as an accounting approver. Accounting Approvers will receive the email once per day with the subject line 'ERP Integrations Daily Summary' until their response is submitted. This notification lists all of the budget line items awaiting that person's acceptance.

Things to Consider

- **Required User Permissions**:
  - '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.

  Note: Users who are granted only 'Standard' level permission to the ERP Integrations tool can view information, but do not have sufficient permission to accept/reject commitments for export.
- **Prerequisites**:
  - The company account must be integrated with Sage 300 CRE. See Sage 300 CRE: Setup Guide.
  - The Commitments tool must be an active tab on the project. See Enable the Commitments Tool.
  - The commitment must be sent to the ERP Integrations tool. See Send a Commitment to ERP Integrations for Accounting Acceptance.

Steps

Review a Commitment

1. Navigate to the company's **ERP Integrations** tool.
2. In the Sage 300 CRE Integration page, click the **Commitments** subtab.
3. In the 'Views' menu, click the **Ready to Export** link.
   This page that appears lists only the commitments that have been sent to the ERP Integrations tool for accounting approval. See Send a Commitment to ERP for Accounting Acceptance.
4. Continue with one of the following:
   - Accept a Commitment
   - Reject a Commitment

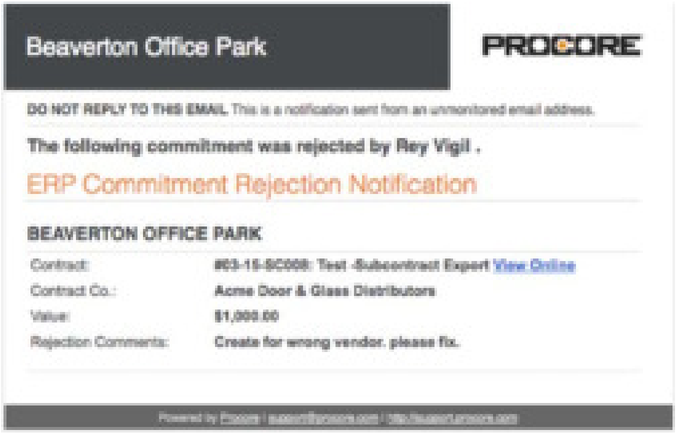
Accept a Commitment

1. Locate the commitment in the 'Commitments - Ready to be Exported to Sage' list.
2. Choose the **Accept** option.
3. Click **Export**.
   This exports the commitment to your Sage 300 CRE database. The process typically takes a few minutes. (*Note*: If for any reason a commitment (or another item) fails to export to Sage, you can view the failed item(s) by clicking the **Failed to Export** link in the Views menu in the right pane. When an commitment fails to sync, follow the steps in Reject a Commitment and then Re-send a Rejected Commitment to ERP for Sage).
4. (Optional) To verify that the sync was successful, log into Sage 300 CRE and verify that your data appears as expected.

Review the Estimating Spreadsheet and Bid to verify amounts are correct.

Reject a Commitment

1. Locate the commitment in the 'Commitments - Ready to be Exported to Sage' list.
2. Choose the **Reject** option.
3. Enter a short explanation about the reason(s) for the rejection.
4. Click the **Reject** button.
   The following events occur:
   - The system removes the commitment from the ERP Integration tool and returns it to an editable state in the project's Commitments tool. See Edit a Commitment.
   - The system sends an automated 'ERP Commitment Rejection Notification' to the user who created the commitment. This alerts the user of the 'Reject' response.



See Also

- [Export a Commitment to Sage 300 CRE]