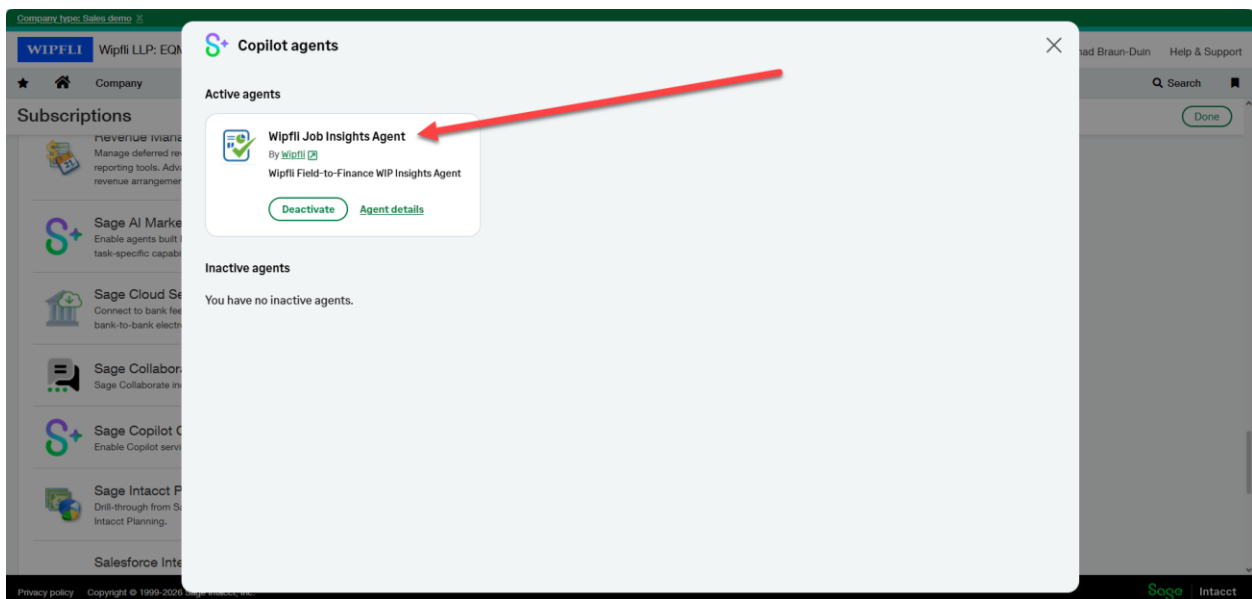


Job Insights – Install and Configure for Procore

This instruction manual only pertains to Procore users of the Sage Copilot Wipfli Job Insights Agent. Use this to install and configure the Procore component of the agent.

Sage app installation

Within Sage, go to Company → Subscriptions and find Sage AI Marketplace and click on the “Manage agents” link. Confirm that you have Wipfli Job Insights Agent installed. If not, click Activate it to install it.

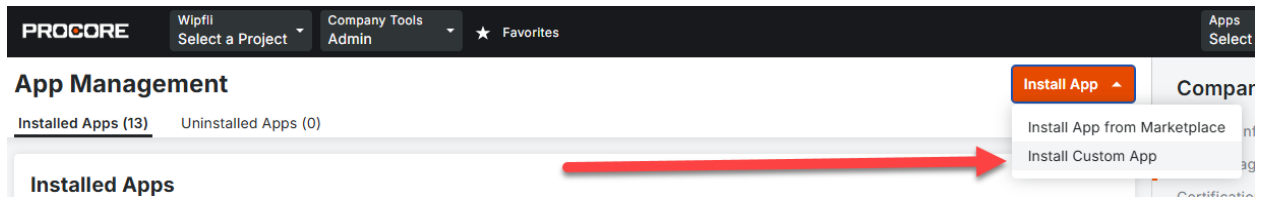


Procore app installation

A Procore API app called “Wipfli WIP Field to Finance” will need to be installed first.

If you have already installed the app within Procore and just need to configure it, [skip down to Step 1.](#)

If you need to install the app, click on Install App and choose Install Custom App.



Enter the following app UUID into the textbox and click Install

acf820a0-5c0c-4e79-9869-3eaa28133705

Install App



Please enter an App Version ID (36 Characters).

Cancel

Install

Step 1: Configure Procore Projects

After installation, go to the Permissions tab and Permit the projects you would like to use with this agent.

1. Select as many existing projects as you would like to use
2. Select your "Project Template" to make sure all new projects are included with the agent

PROCORE Wipfli Select a Project Company Tools Admin Favorites Apps Select an App

Wipfli > App Management > Wipfli WIP Field to Finance

Wipfli WIP Field to Finance Uninstall

App Info Setup Instructions Permissions

Project Company

Project Level Permissions

Tool	None	Read-Only	Standard	Admin
Bidding			✓	
Budgeting		✓		
Budoets		✓		

Permitted Projects

- Amazon Warehou... X
- Lincoln Yards X

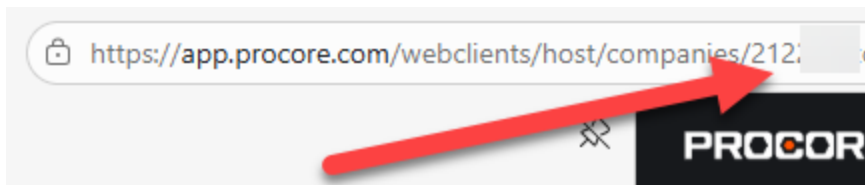
Add

Project

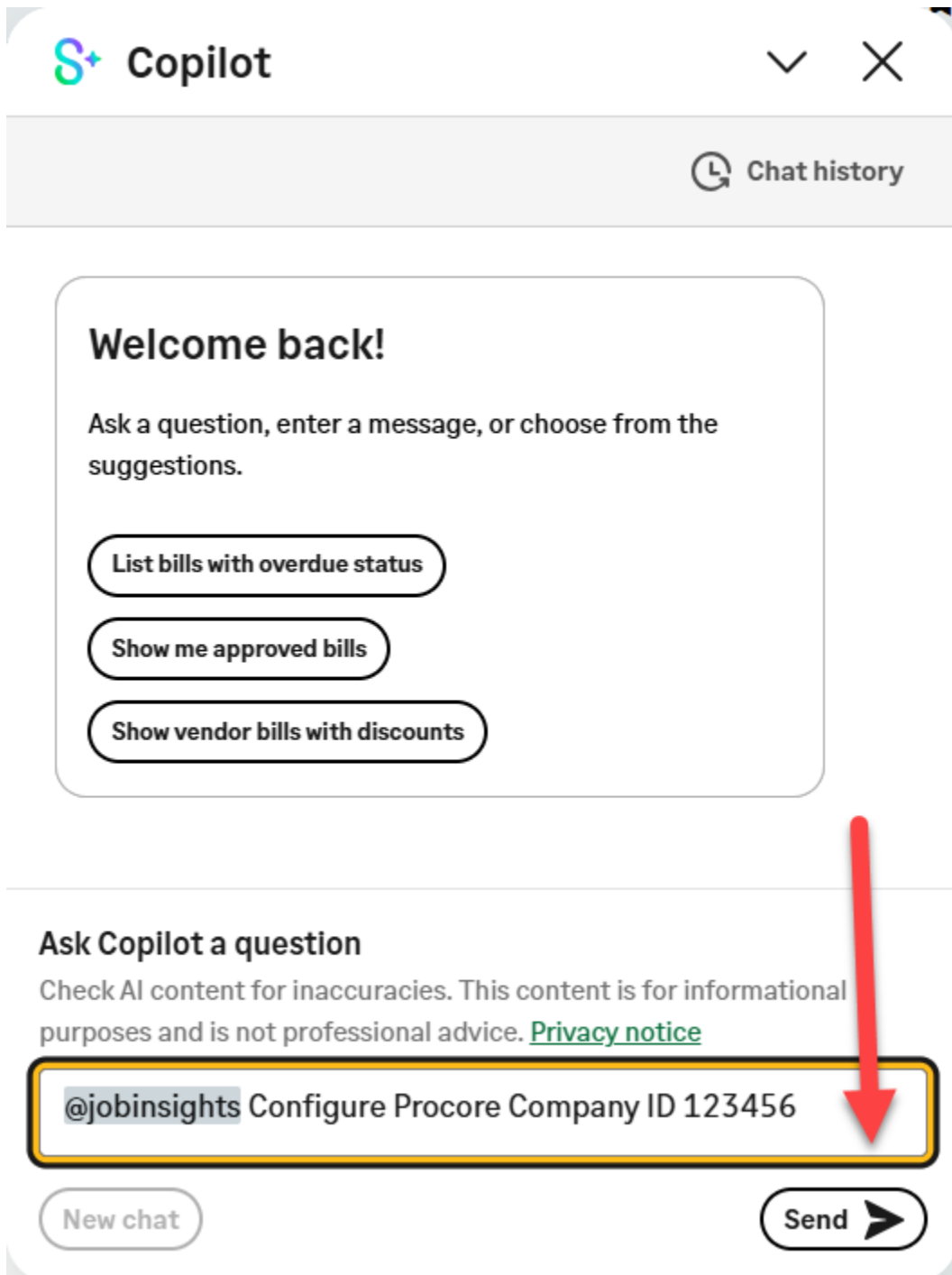
- Standard Project Template X

Step 2: Configure the agent

1. Find your Procore Company ID from your Procore web URL (see example below). Copy that number. You will need it for the next step.



2. Open Sage Copilot and enter the following prompt for the agent replacing 123456 with the company ID value you just grabbed from the Procore web URL bar and hit send.
 - @jobinsights Configure Procore Company ID 123456



You can now use prompts that will pull costs, budgets, and other information from Procore as well as Sage.