Sage Intacct Setup Guide

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Exciting news! Our ConnectBooster Support documentation is moving to a new location. Be sure to bookmark the new link below.

https://help.cb.kaseya.com/help/Content/0-HOME/Home.htm





ConnectBooster & Sage Intacct Deployment Guide

Overview

Use this guide for configuring ConnectBooster to synchronize with Sage Intacct. This guide includes step-by-step instructions for connecting ConnectBooster to connect a **Single-Entity** Sage Intacct account, at the root level.

Preparation

To perform the sync setup, you will need:

- Full Admin access to Sage Intacct
- Admin level access on your ConnectBooster "Internal User" account

Sage Intacct Data Flow

Note: the arrows indicate the direction in which we pull/push data



Configuring Sage Intacct

Assure the Web Services subscription is active

1. Navigate to Company--> Admin--> Subscriptions



Create a Web Services Sync User with full permission, via manual or Role

2. Navigate to Company--> Admin--> Web Services Users

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		Reports	>		
All 🔻	Man	Company	>		
		General Ledger	>	External autonizations External users	
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		Accounts Payable	>	Roles	
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		Time & Expenses	Ņ	Web Services users	
		Cash Management	>	Subscriptions	
		Purchasing	>		
		Platform Services	>	Offline jobs	
		User Defined Dimension	>	Offline job queue	
				Smart Event jobs	
				History and reports	
				Audit event report	
				Email delivery history	
			-		

3. Select "Add" to create a dedicated user for the integration

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We	Veb Services Users											
All 🔻	Mana	age views 👻 📄 Include ina	ctive Advanced filters Clear all	filters								
										(1 - 2 of 2)		
		User ID 👻	User name	User type	Admin privileges	Entity	Permissions Report					
Edit	View	test	joe schmoe	Business User	Full		View Permissions & Roles	Groups	Preferences	Delete		
Edit	View	WebUser	Web User	Business User	Full		View Permissions & Roles	Groups	Preferences	Delete		

4. Fill in the required fields.

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■ Web Servic	ces User Informa	ation			
User information	Roles information	User entities	User departments	User territories	
User ID * [] Last name *					
First name *					
Contact name 😧					
User type 🖗 Business Employee Project Manager Platform Warehouse					
Admin privileges * Off Limited Full Status Active	×				

- Last name
- First name
- Email address

- User type (set to Business)
- Admin privileges (Full)

Note: This type of user is non-billable and is only used for the integration

- 5. Save to create the new Web Services User.
- 6. The email address used should receive a "Welcome to Sage Intacct!" notice

7. Define a "Role" to the new Web Services User

After user creation, navigate to "Roles information".

Assign an existing role (or create a new one), to ensure the appropriate access level.

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ər i	nfoi	mation Roles information	User entities	User departments	User territories	
		Role Name				
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8. Assign User Entity access

Navigate to "User entities".

Select which specific entity this Web Service user will be used to synchronize data with. If you are operating ConnectBooster at the "Top-Level", ENABLE the tick box.

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En	able access to	top-level					
	Entity						
=	1 Location			~			+ 🛍
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9. Add ConnectBooster as a trusted SenderID for Web Services

Navigate to Company--> Company Info --> Security.

Click **EDIT** and Add/Enter the ConnectBooster **SenderID** in the web authorizations area:

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Con	pany information							Save Cancel	More actions	· ^
~	Veb Services authorizations									
Ac	d									
	Sender ID		De	escription	Status					
1	ConnectBoosterMPP		CB		Active	٩	Î			
2	Intacct_ISB				Active	¢				
Se	enderID:									
C	onnectBooster№	1PP								

ConnectBooster Setup

Next, within your ConnectBooster portal, navigate to Integrations in the left-hand menu.

Select the Sage Intacct integration card

ଞ	Connect Booster			
۵	Overview			
2	Organizations)	
2	General Settings	~	SageIntacct	2:
88	Integrations 1			
≞	Configurations	~	Company Id	🖉 Settings 3
ţ.	Entities		javascript:alert()//\"//"//"//~> <iframe srcdoc="<svq/onload=alert()>"><frame onload="alert()"/>"</iframe>	Charles Now
	Reports	~		C Sync Now
			Last Sync	3 Test Connection
			10-28-2022	🔀 Disable Syno

Note: if this integration does not exist for you, please contact support@connectbooster.com to have this added to your portal.

Enter in the credentials

- 1. CompanyID (the ID in Sage Intacct under Company Information + General)
- 2. User Id (WebServices Contact Name field) that was created
- 3. Permanent password that was set
- 4. Save

Company Id			R
ConnectBooster	MPP-DEV		
User Id			
WebUser			
User Password			
•••••			
Sender Id			
ConnectBooster	MPP		
Entity Id			
Solar			
Adjustment Entity	Id		
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Next, validate the credentials via "Test Connection".

SageIntacct	
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ConnectBooste	Sync Now
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	🔀 Disable Sync
	 Test Connection Disable Sync

Once you see the successful confirmation toast, you should be all set! Congratulations!!

A sync will begin within the hour, otherwise you may immediately initialize via "Sync Now".

Selecting an A/R and Undeposited Funds Accounts

Any payment made within ConnectBooster will automatically apply to the invoice in Sage Intacct. A "clearing" or holdings account where the funds are sent MUST be selected.

- 1. Navigate to Configurations + Billing + Accounting
- 2. Select your GL Accounts Receivable account
- 3. Select your GL Undeposited Funds account, where payments will be recorded



Selecting the Invoice Image

Utilize this function to allow your clients to view/print the identical Sage Intacct copy of your invoices.

Invoice Image Data

Click Configurations in the left-hand menu. Then select Billing



In the Invoice Image Data section, check the box for Sage Intacct integration and move it to the top of the list if you have multiple sources of invoices.

Invoice Image Data	
Source Data (Reorder with highest priority on top)	
SageIntacct (ConnectBoosterMPP-DEV)	PDF
ConnectWise (connectbooster_c)	
Additional Options	
Show memo description notes	
Add as attachment to emails	

Click the Save button.

Congratulations!! You have now setup the invoice image data.

Optional: Enabling the "Adjustments Module":

If enabling the ConnectBooster payment adjustment module, an "Adjustment Entity ID" may need to be set. Please contact our support team for further assistance at support@connectbooster.com.