Sage Intacct Setup Guide

Last Modified on 02/02/2024 11:35 am CST

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

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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

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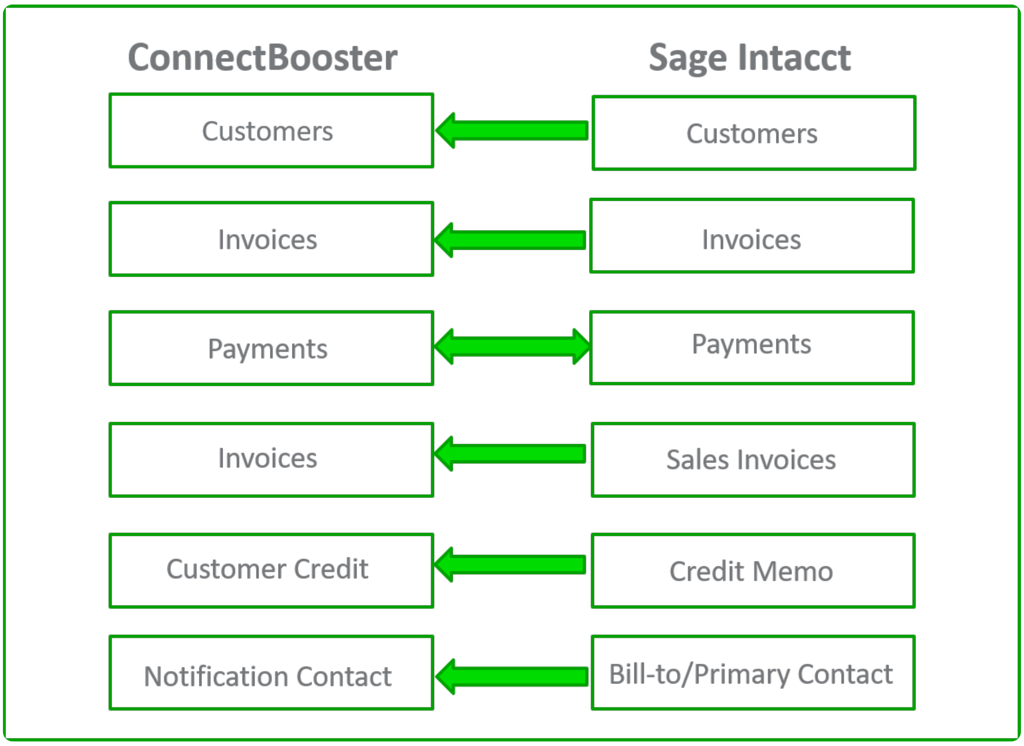
Sage Intacct Data Flow

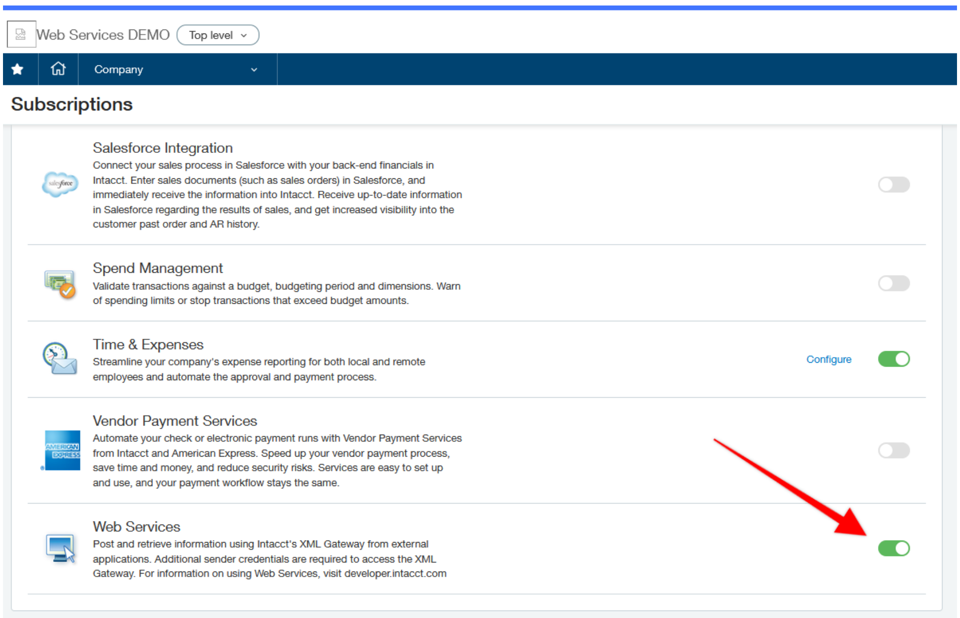
> **Note: the arrows indicate the direction in which we pull/push data**



Configuring Sage Intacct

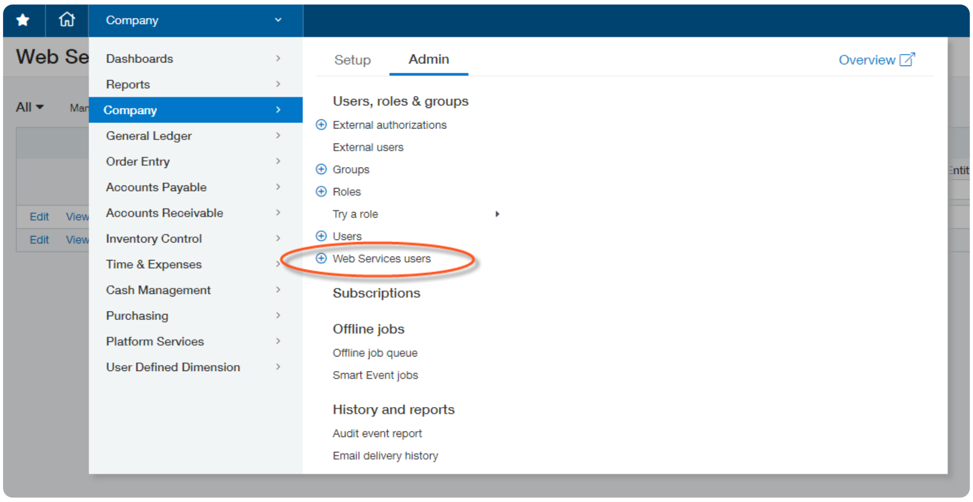
Assure the Web Services subscription is active

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

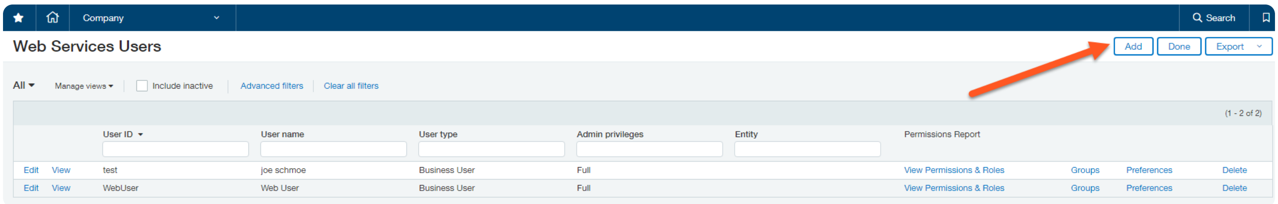


Create a Web Services Sync User with full permission, via manual or Role

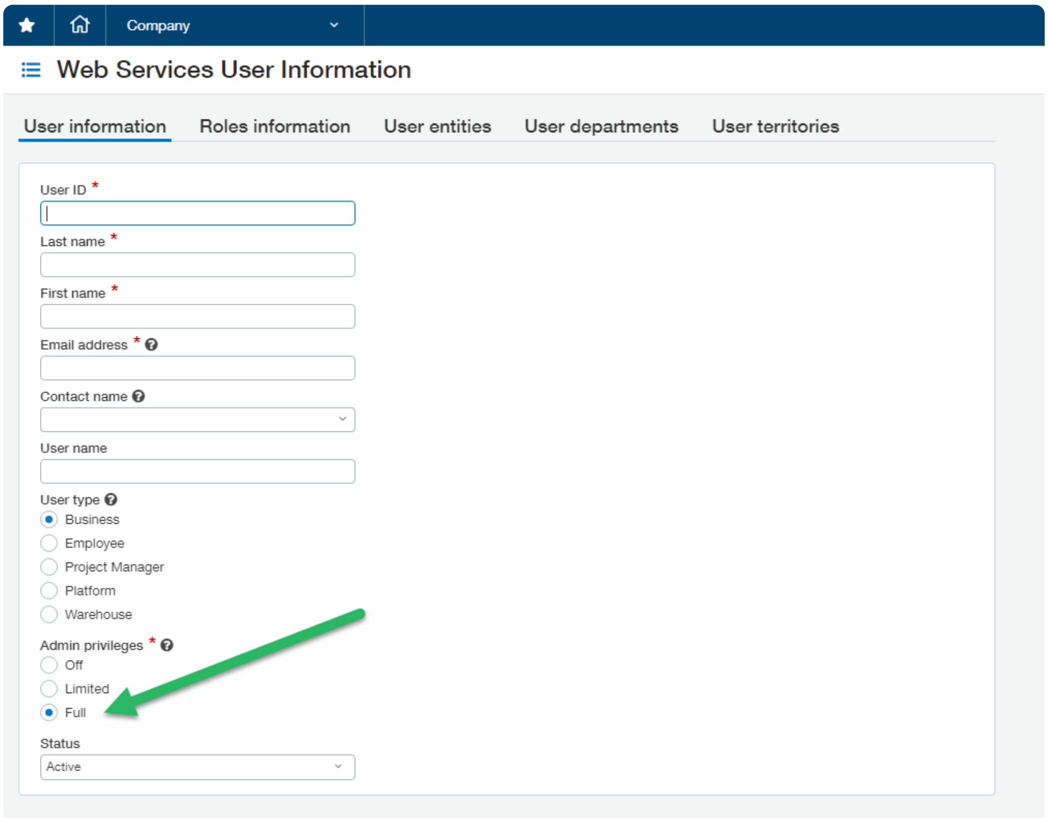
2. Navigate to Company--> Admin--> Web Services Users



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



4. Fill in the required fields.



- 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

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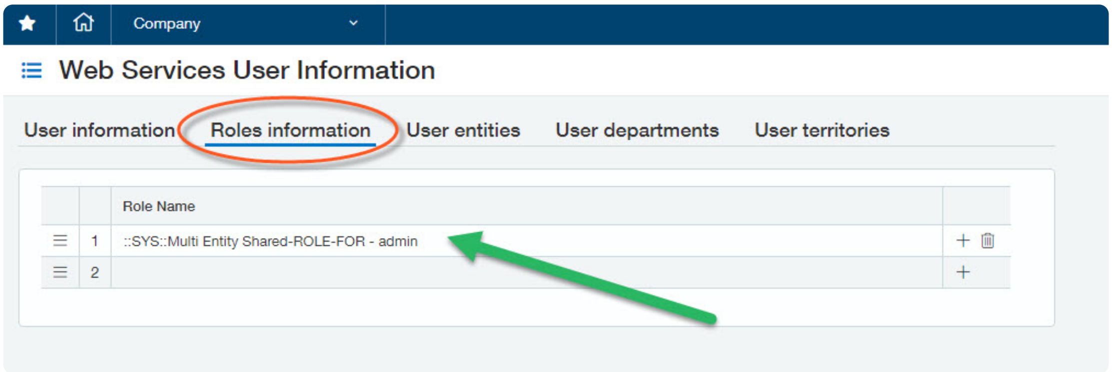
7. Define a "Role" to the new Web Services User

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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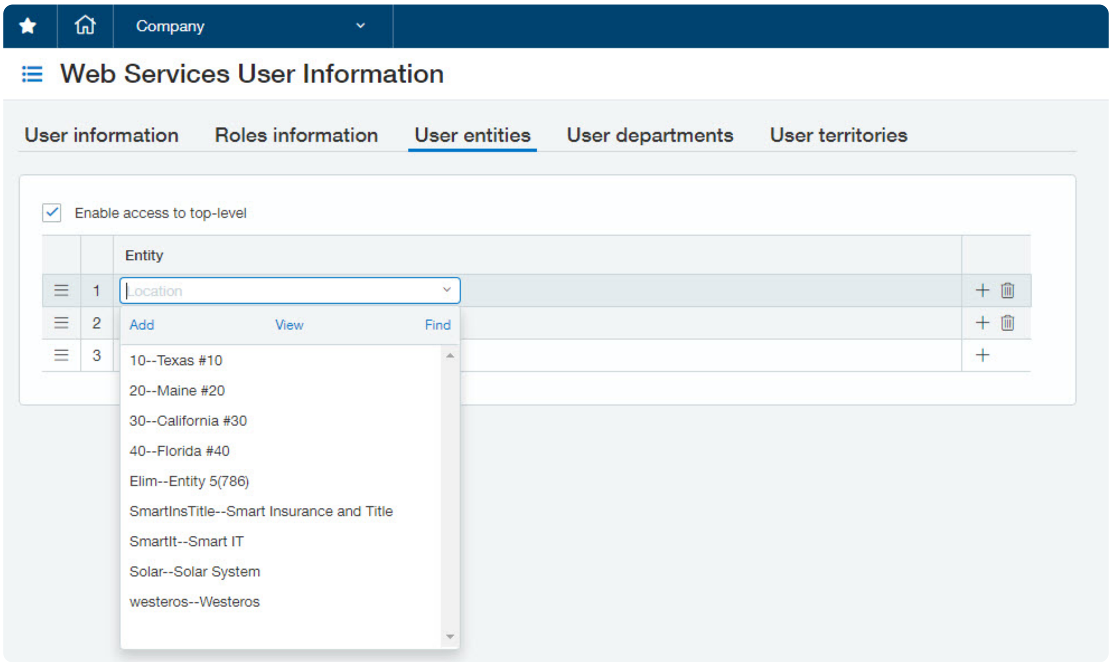
8. Assign User Entity access

Navigate to "User entities".

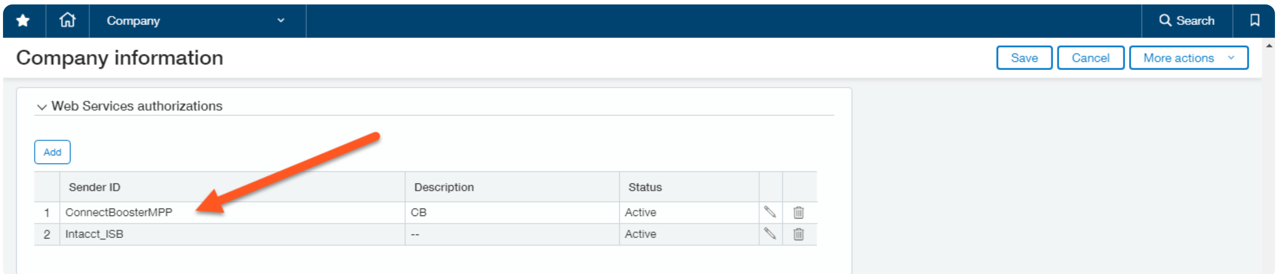
Select which specific entity this Web Service user will be used to synchronize data with. If you are operating ConnectBooster at the "Top-Level", ENABLE the tick box.



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:



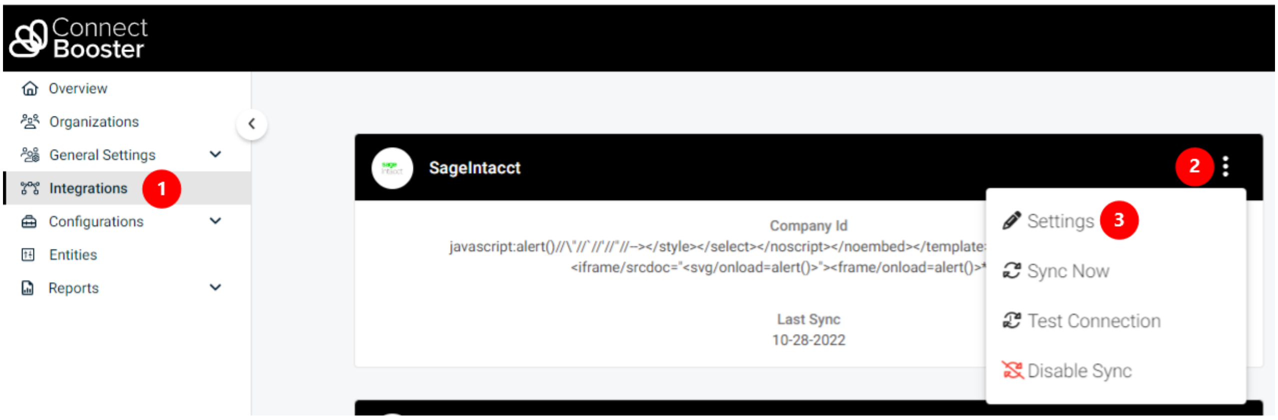
SenderID:

ConnectBoosterMPP

ConnectBooster Setup

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

Select the Sage Intacct integration card



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

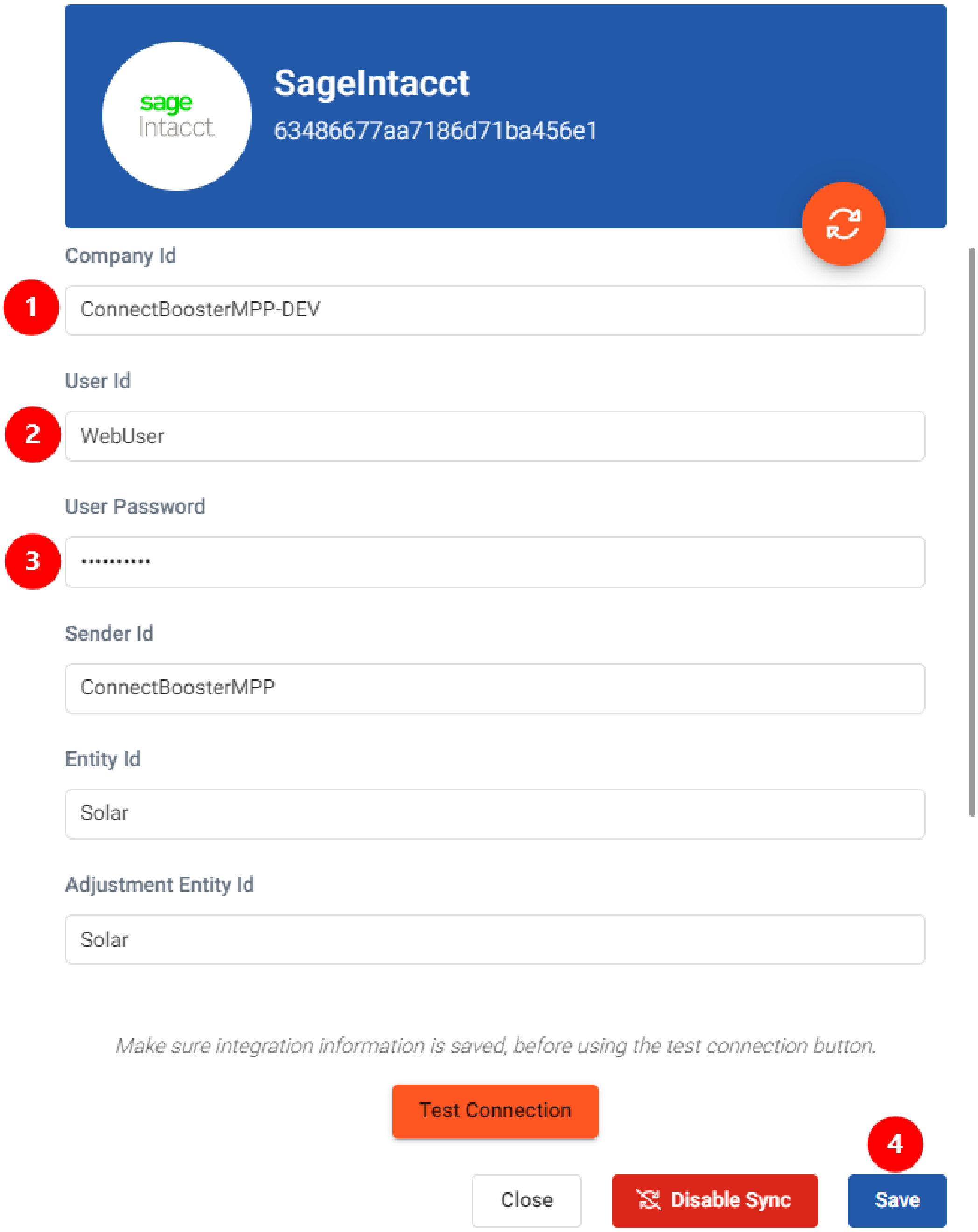
Enter in the credentials

1. CompanyID (the ID in Sage Intacct under Company Information + General)

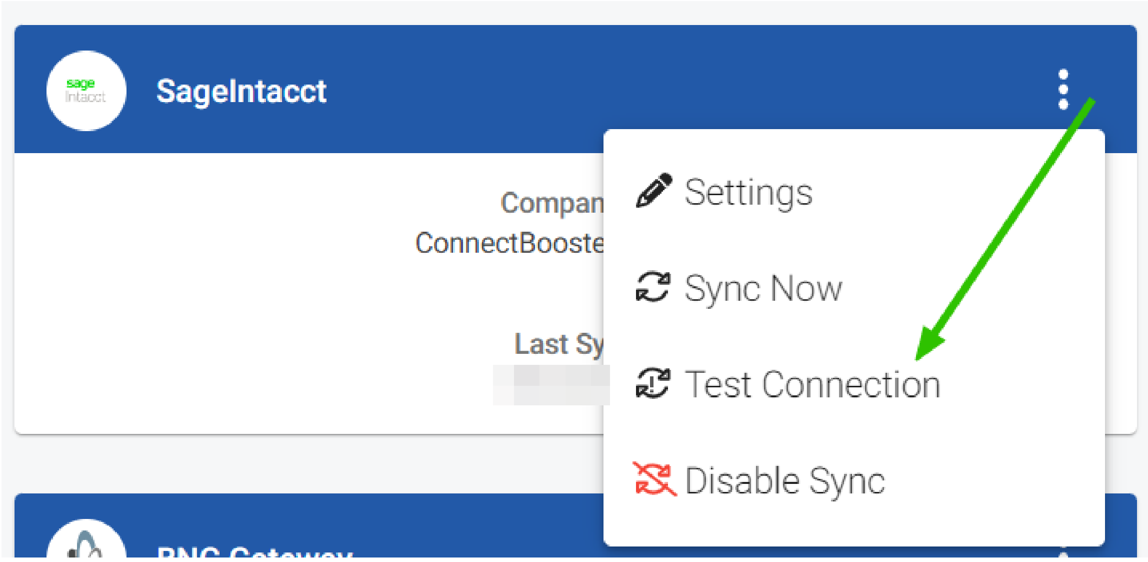
2. User Id (WebServices **Contact Name** field) that was created

3. Permanent password that was set

4. Save



Next, validate the credentials via "Test Connection".



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".

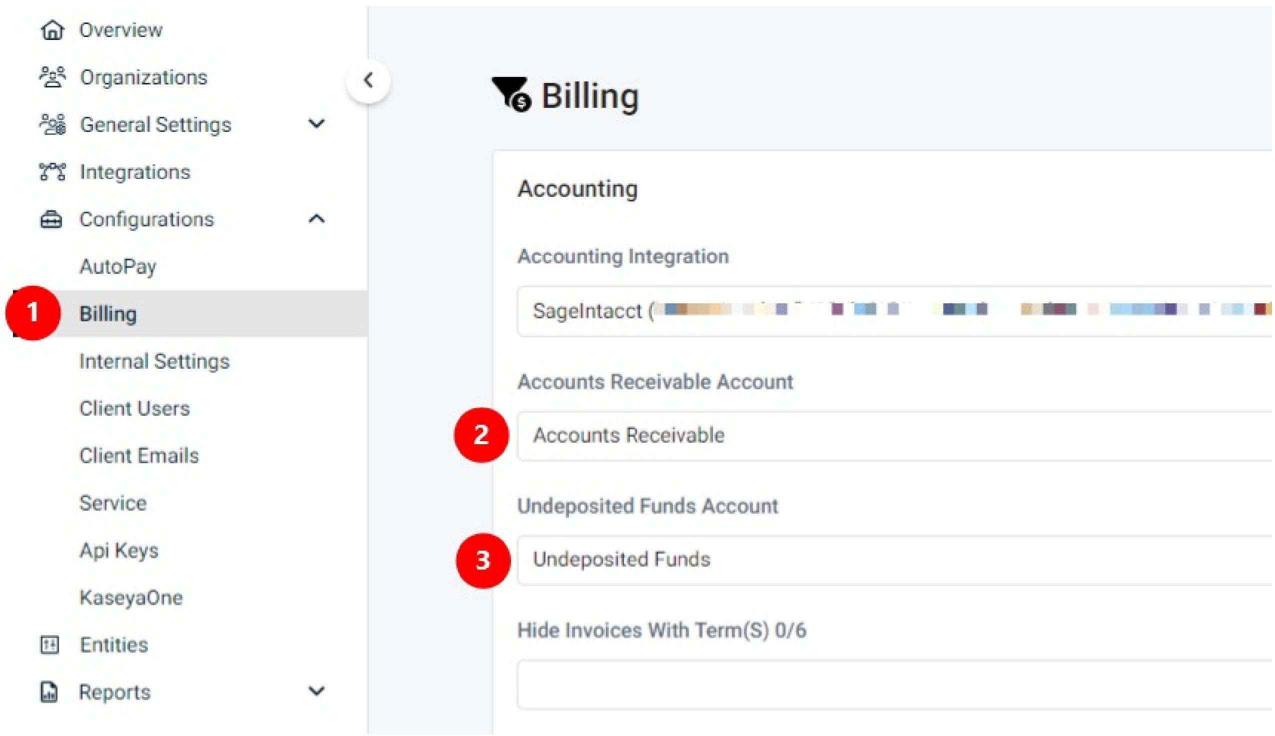
Selecting an A/R and Undeposited Funds Accounts

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

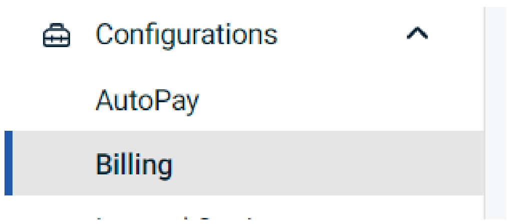


Selecting the Invoice Image

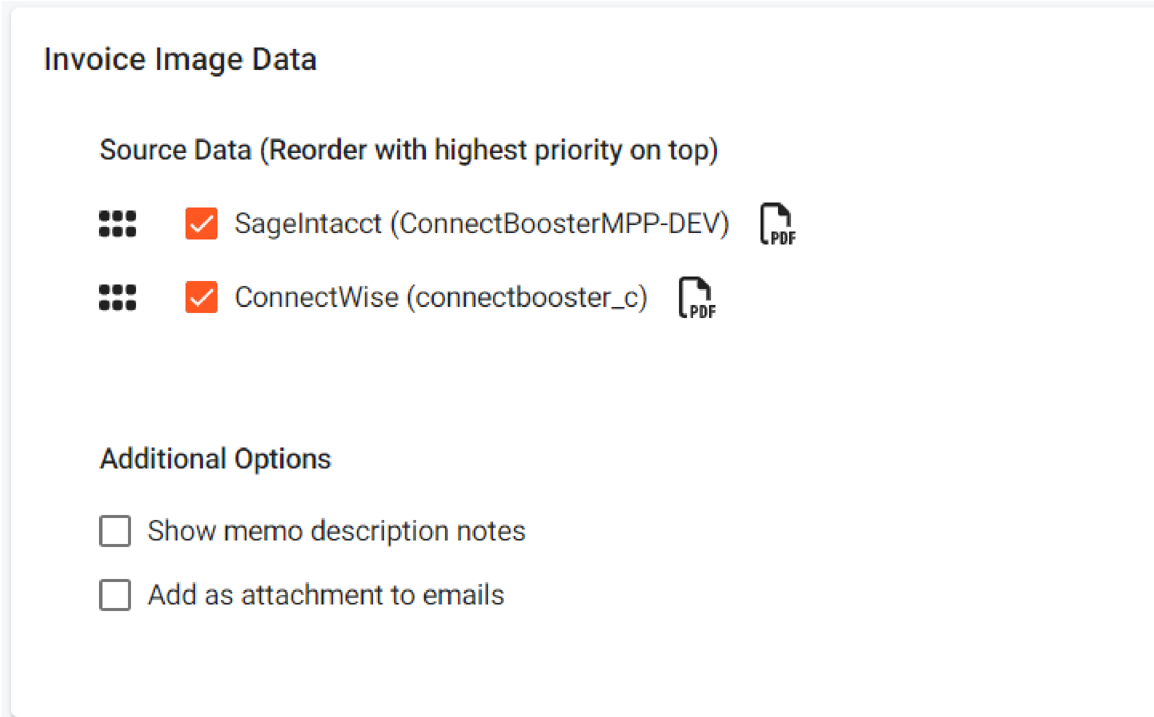
Utilize this function to allow your clients to view/print the identical Sage Intacct copy of your invoices.

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.



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.