



# Sage Intacct Configuration Checklist

In order to integrate Intacct with BigTime, this is a checklist of what is needed within the customer's Sage Intacct account.

- Web Services User with full Admin privileges
- Authorize **BigTime** in the Web Services Authorizations (this is case sensitive) Integrating BigTime with Intacct requires an admin user to login when connecting Determine if connecting at Master level or to a specific Entity
- Projects Module or Project Dimension (Order Entry >> Configuration >> Dimensions setup >> Project Dimension) = Yes
- User must "Manage from the Top Level" (Company > Admin > Subscriptions > Projects > Configure > Manage from the "Top Level" setting)
- Order Entry Module = Yes
- Items = *Non-Inventory* type (NOT *Non-Inventory Sales Only*)
- Order Entry "Sales Invoice" Invoice Transaction (Transaction definition must be labeled as "Sales Invoice")
- Do not enable the Contracts module if you want to post time from BigTime to Intacct. The Contracts module will require Tasks on the timesheets. Intacct will require the Timesheet configuration to include Tasks with the Contracts module. BigTime cannot link to an Intacct Task therefore it will fail to post timesheets.
- Timesheet Configuration:
  - Project and Item
  - Submission period matches BigTime's submission period
  - Time Types (link to Labor Codes in Big Time if using. Not required)
  - Turn on **Enable Duplicates** setting on *My Timesheet & Lines in a Timesheet* (Projects > Setup > Configuration > look for Enable duplicates under the Timesheet Rules section)

