# Sage Intacct Configuration Checklist

To integrate Intacct with BigTime, the following checklist outlines the necessary steps within the customer's Sage Intacct account.

- [ ] Create a Web Services User (BigTime) with full Admin privileges.
- [ ] Authorize the sender ID BigTime (case-sensitive) in Company → Setup → Web Services Authorizations. This step is separate from creating the Web Services User. Integrating BigTime with Intacct requires an admin user to log in when connecting. Determine whether to connect at the 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 the Enable Duplicates setting on My Timesheet & Lines in a Timesheet (Projects > Setup > Configuration > look for Enable duplicates under the Timesheet Rules section).