Connect Sage Intacct to Instrumentl

This guide walks you through connecting Sage Intacct to Instrumentl so you can automatically track award spend-down.

What to Expect

This is a one-time setup that keeps Instrumentl synced with Sage Intacct — so you can monitor award spend-down in real time without manual expense exports.

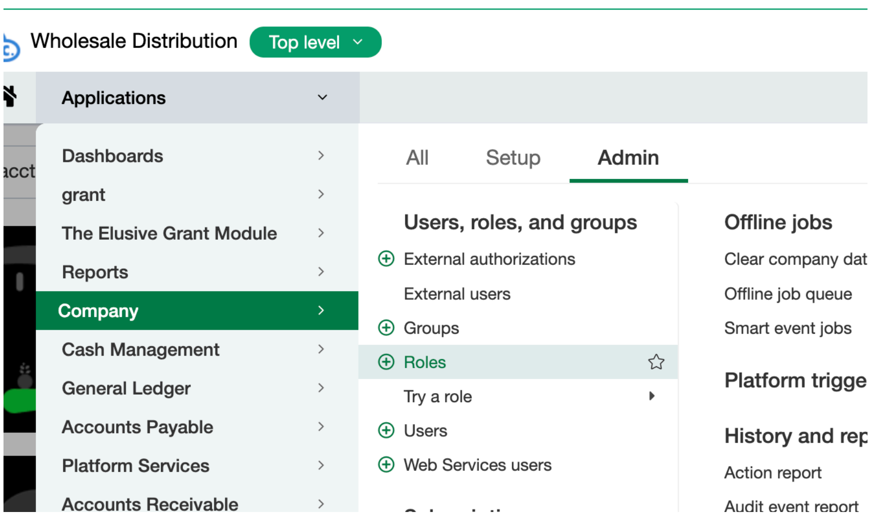
- **Step 1:** Configure Sage users and permissions for Instrumentl to safely access.
- **Step 2:** Set up Sage to automatically share updates with Instrumentl.
- **Step 3:** Finish connecting Sage within Instrumentl.

Step 1: Configure Sage Users & Authorize Instrumentl

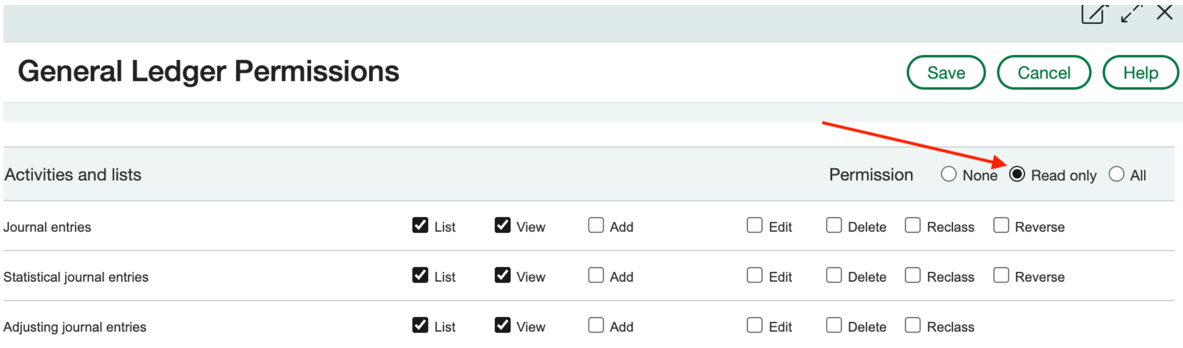
Your first step is to set up Sage so Instrumentl has secure, limited access. You'll create a special role with read-only permissions, make a dedicated integration user with limited access to make the integration work smoothly, and authorize Instrumentl as an approved app. Together, these steps give Instrumentl visibility into your financial data without changing any data in Sage.

Create a Role

- The first step is to create a new role in your Sage Intacct instance. In the main nav, navigate to: **Company → Admin → Roles**



- Click **+ Create** in the top right corner. Name this role **Instrumentl User Role**, and optionally include a helpful description that describes this role, e.g. "This role gives the Instrumentl app access to specific data in our system".
- The next screen is where you set the permissions for this role. You will need to provide **Read only permissions** on **General Ledger,** and then one or more of: **Project, Company, Contracts, Accounts Payable, Inventory Control, or Fixed Assets**. First click into **Permissions** next to General Ledger, and then click on **Read only** in the top corner of the popup. Click **Save**.

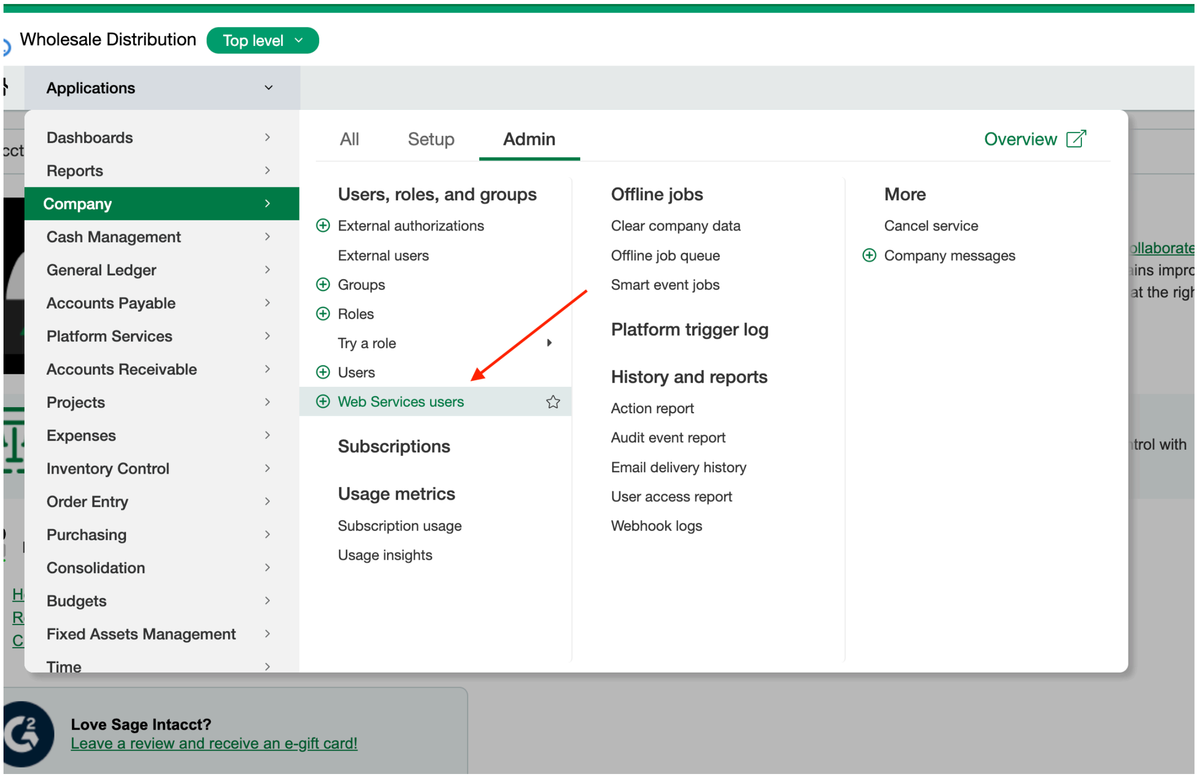


- Repeat the exact same step above for all of your account-specific resources like: Projects, Company, Accounts Payable, etc. For example, these may be where you store your Grants. Click into **Permissions** next to **Project,** and then click **Read only** in the top corner, and click **Save**.
- Once you've set the specific permissions, click on **Save** in the top right corner once again.

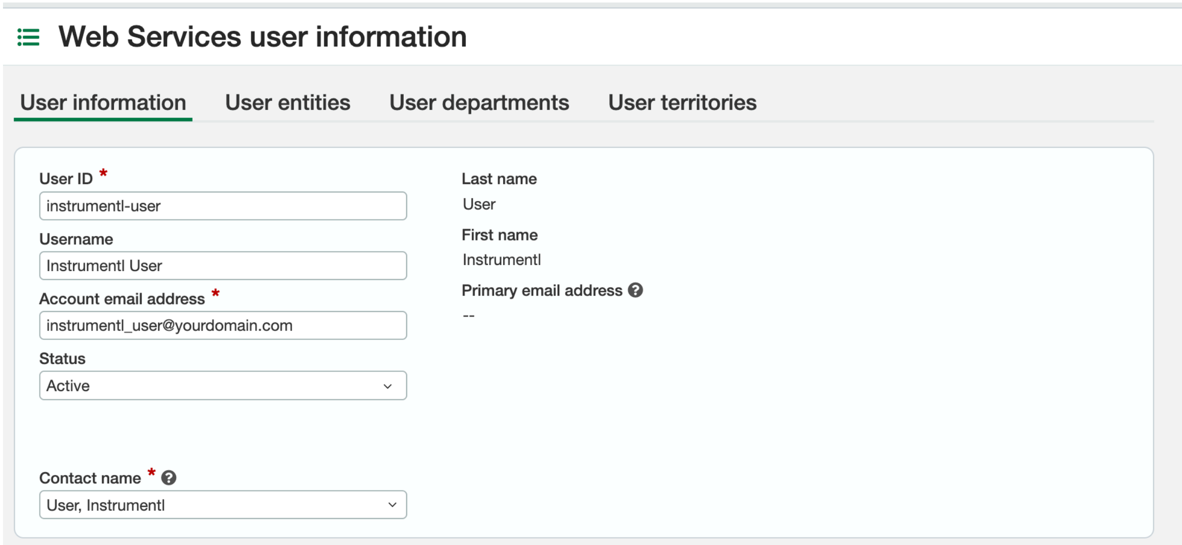
Create a Web Services User

Now that you've created the new role, the next step is to create a new "Instrumentl Integration" Web Services User as follows:

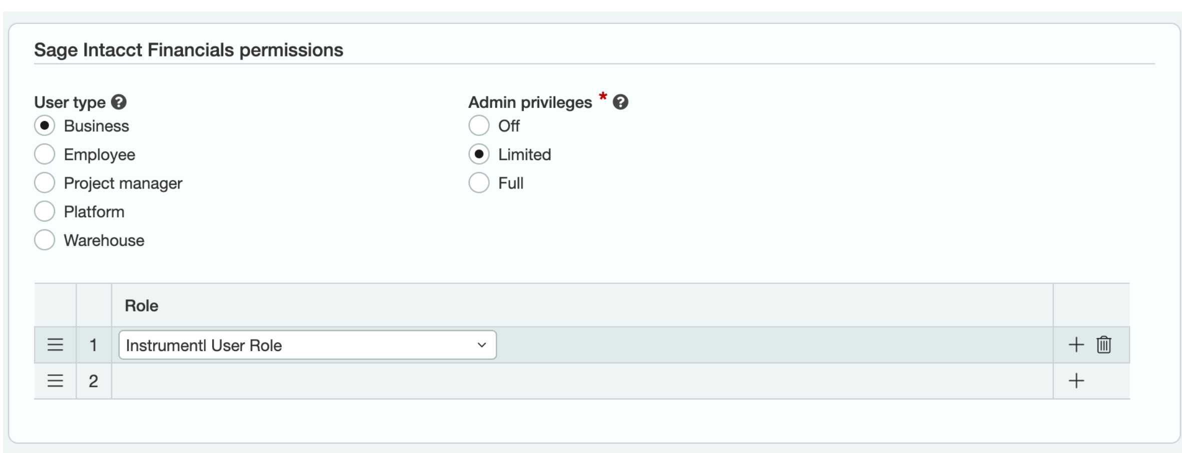
- Go to **Company → Admin → Web Services Users**.



- Click on the **+ Create** button in the top right corner, and fill in the information as appropriate for your system:
    - The **Account email address** can be a *new* email address, or it can be an *existing* user's email address.
    - Optionally, create a **Contact** for tracking usage.
      In this screenshot, I've opted to create a new Contact under the "Contact name" dropdown. This will help keep track of logins, usage, data access, etc, but is not required.



- To set the right permissions, you will need to assign the following:
  - **User type** → Business
  - **Admin privileges** → Limited
  - **Role** → "Instrumentl User Role" (this is the user role you created in the prior step)

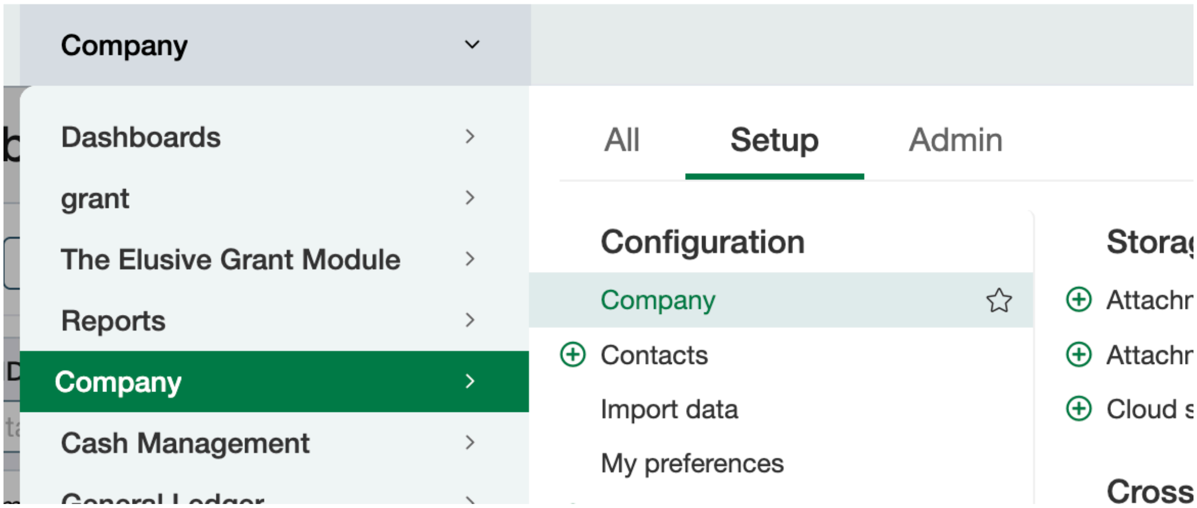


- Click **Save**.

Authorize Instrumentl

Now that you've configured your users, you're ready to allow Instrumentl access to your Sage Intacct account.

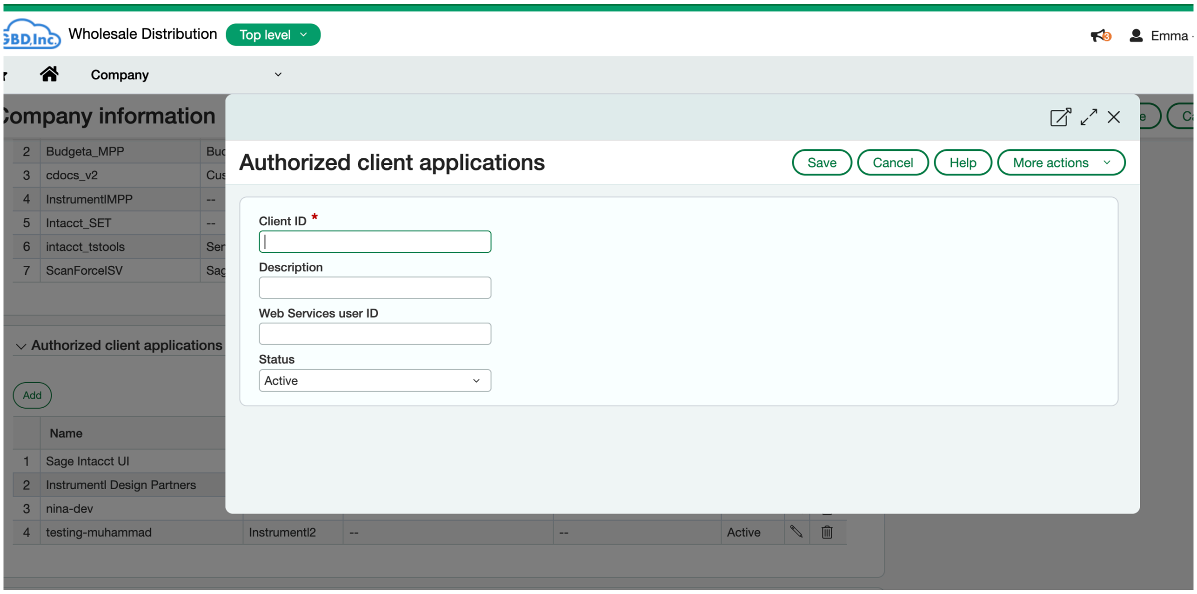
- Go to: **Company → Setup → Company**



- Click on **Security**, and then click on **Edit** (top right).
- Scroll down to the section called **Web Services Authorizations**, click **Add,** and enter:
  - **Sender ID:** `InstrumentlMPP`
  - **Description:** `Instrumentl Web Services Authorization`
  - **Status:** Active
- On the same page as before (**Company → Setup → Company → Security**), click **Edit** once again and in the section called **Authorized Client Applications** click **Add** and enter:
  - Client ID: `b7dc3d8b683e88f4f3df.app.sage.com`
  - Description: `Instrumentl web services client application`
  - Web Services user ID: `instrumentl-user`
    (or, enter the value from the User ID at step **"Web Services User Configuration"** earlier in this guide if different.)

- Status: **Active**

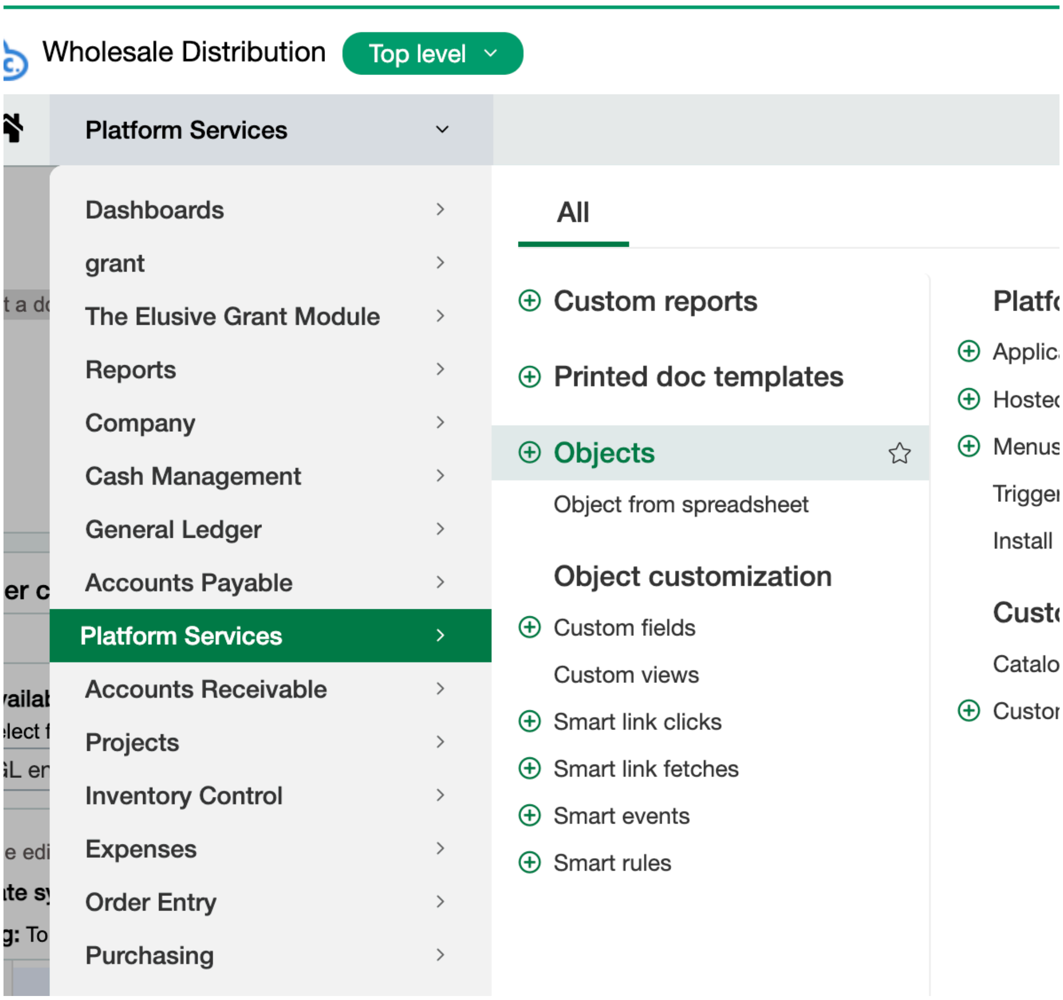
- Click **Save**. That's it — Sage is now safely configured for Instrumentl to connect.



Step 2: Set Up Automatic Updates

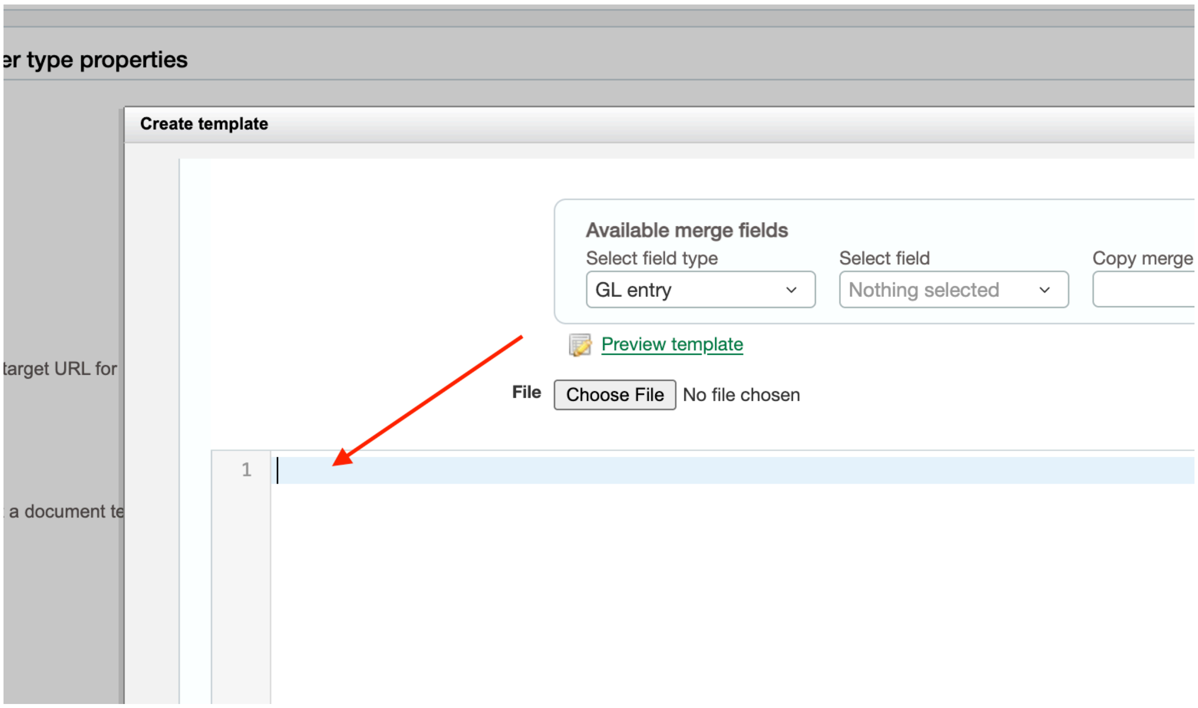
This step keeps Instrumentl up to date automatically. You'll create a webhook trigger — a simple rule that tells Sage to send Instrumentl a quick notification anytime expenses are added or updated.

- Go to: **Platform Services → Objects → Gl Entry**



- On the top of this page, click on **Triggers → New Trigger** and set it as the following:
    - **Trigger Type:** select **HTTP Post**, click Next.
    - **Trigger Activation:** select **After Update** and **After Create**.
    - **Trigger Name:** `Instrumentl GL Webhook`
    - Check the box next to **Run offline.**
    - Select **Use webhook delivery,** and enter: `b7dc3d8b683e88f4f3df.app.sage.com`
    - For **Encoding** select **JSON**
    - For **Target URL** enter `https://www.instrumentl.com/api/v1/webhooks/sage_intacct`
    - Under **Document Template**, click the green circle with a plus ➕, name it **GL Entry Template**, leave the other options the same.

🚨 Leave the free text box empty for now — you'll fill this in later in the setup.



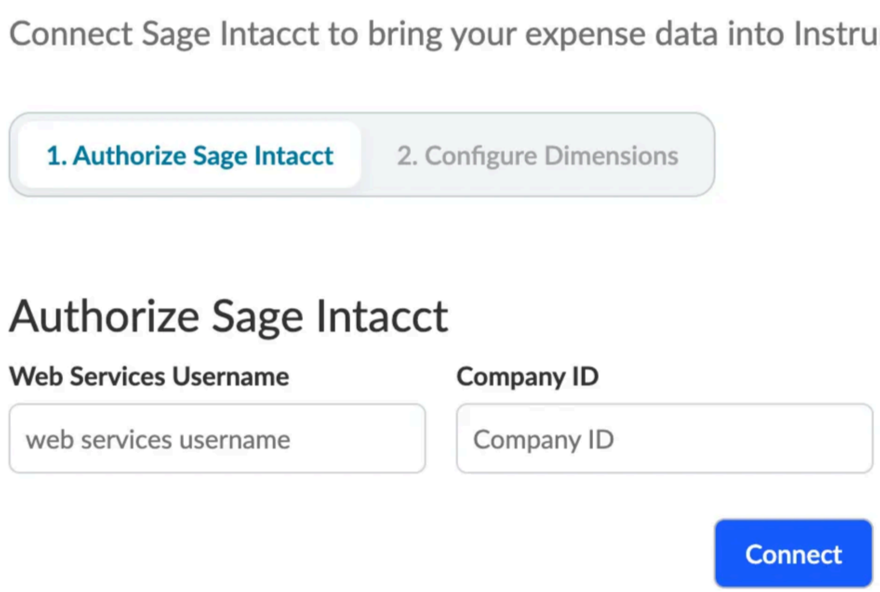
    - Scroll down in the popup and click on **Save**. Once the popup closes, scroll down to the bottom of the page, and click on **Save** there as well.
- You're now ready to finish the configuration within Instrumentl!

Step 3: Finish Connecting in Instrumentl

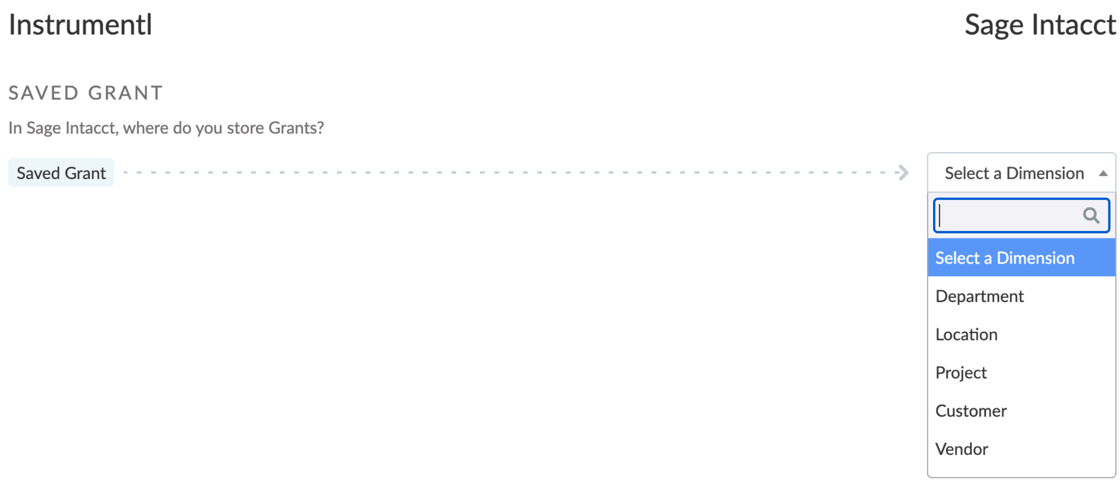
This final step links Sage Intacct with Instrumentl and tells Instrumentl exactly where to pull your expense data from.

- Go to https://www.instrumentl.com/integrations/
- Scroll to **Sage Intacct**, and click **Log into Sage Intacct**.
- Enter:

    - **Web Services Username:** `instrumentl-user`
      (or your chosen User ID entered at step “Web Services User Configuration” earlier in this guide)
    - **Company ID:** Found in Sage by going to **Company → Setup → Company → Company Information** and at the top of the page under Company Information you will see Company Id.



- Click **Connect**.
    - ✅ You’ll see a green success banner if it worked.
    - ❌ If not, review your steps or email hello@instrumentl.com.
- Click **Next**.
- The next page asks you to choose the **Dimension** in Sage Intacct where you track grants (Standard or User-Defined).
  If you store grant information elsewhere in Sage Intacct, please contact hello@instrumentl.com.



- The second step on this page helps you finish setting up your **Webhook Triggers**.
    - Copy the **JSON snippet** shown on the Instrumentl page.
    - In Sage Intacct, go to **Platform Services → Objects → GL Entry**.
    - Find the webhook trigger that you created earlier, and click on **Edit**.
    - Edit your **Document template** by clicking on the pencil icon.

    - Paste the **JSON snippet** you copied from the Instrumentl page. It will look something like the code below.
      Note: The account_id and access_key values will be unique to your account.

```
{
  "record_type": "GLJOURNAL",
  "key": "{!BATCHNO!}",
  "account_id": "01..50",
```

```
  "access_key": "b5..2h6",
}
```

- Scroll down in the popup and click **Save**, and then click on **Save** in the parent window.

All set! 🎉

Your grant financials now sync automatically from Sage Intacct to Instrumentl — ensuring your award data is accurate and up-to-date without extra effort.