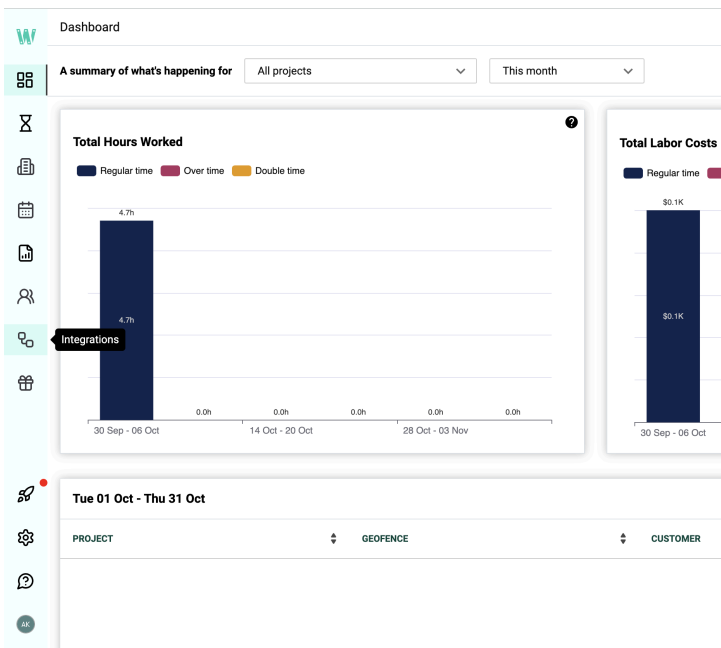


CONFIGURATION GUIDE FOR WORKYARD INTEGRATION

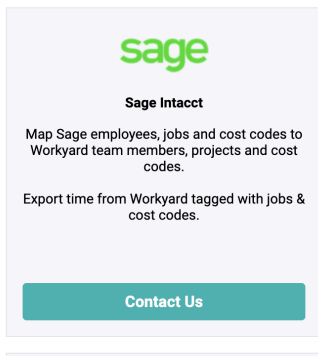
Getting Started

Workyard customers are required to send a request to Workyard’s customer success team in order to initiate the integration process. To send the request:

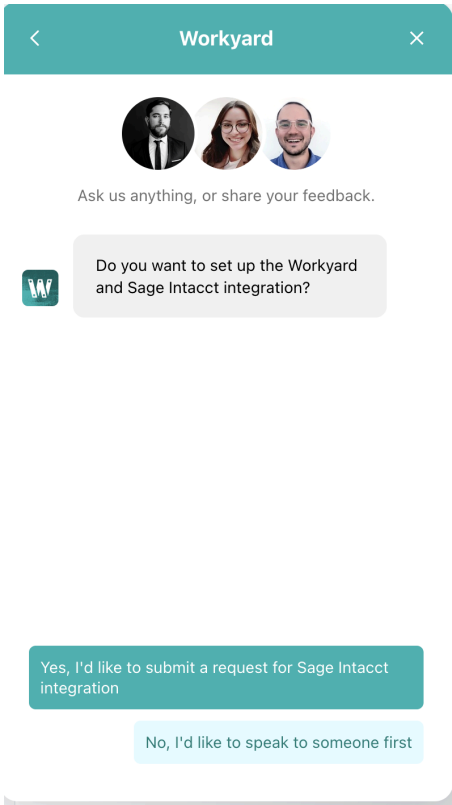
- Go to **Integrations** in your Workyard account



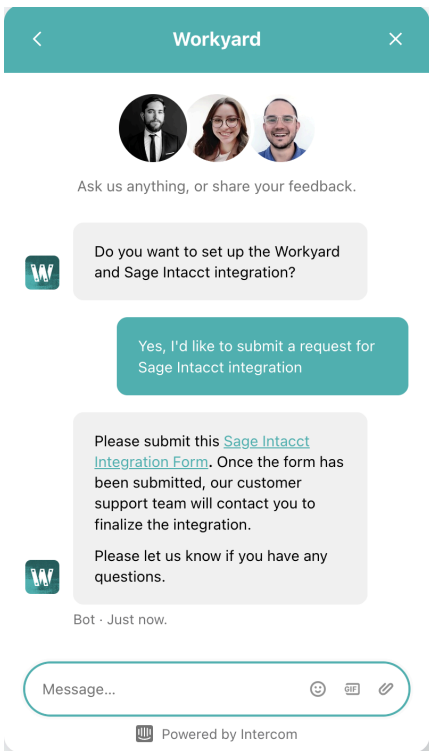
- Click **Contact Us** for Sage Intacct option as shown below



- A chat window will open. Select “Yes, I’d like to submit a request for Sage Intacct integration”



- Submit the form and Workyard's customer success team will contact you for next steps.



Workyard<>Sage Intacct Integration Form

Submit request to integrate your Workyard account with Sage Intacct. Our customer success team will contact you shortly for next steps after submission.

d.com [Switch account](#)

Not shared

* Indicates required question

Email *
Your answer

Company *
Your answer

Additional details
Please share any additional details about your request to integrate with Sage Intacct
Your answer

[Submit](#) [Clear form](#)

NEXT STEPS

Step 1: Workyard team will share their Sender ID with you to be added to the allowed list in Sage Intacct.

1. Company Company Info
2. Click EDIT
3. Click on the 'Security' tab
4. Go to the section labeled "Web Services authorizations" and add the Sender ID

Web Services authorizations

[Add](#)

	Sender ID	Description	Status		
1	Budgeta MPP	SIBP	Active		
2	cdocs	Automatically added based on historical Web Services activity	Active		
3	Intacct_JSB	Automatically added based on historical Web Services activity	Active		

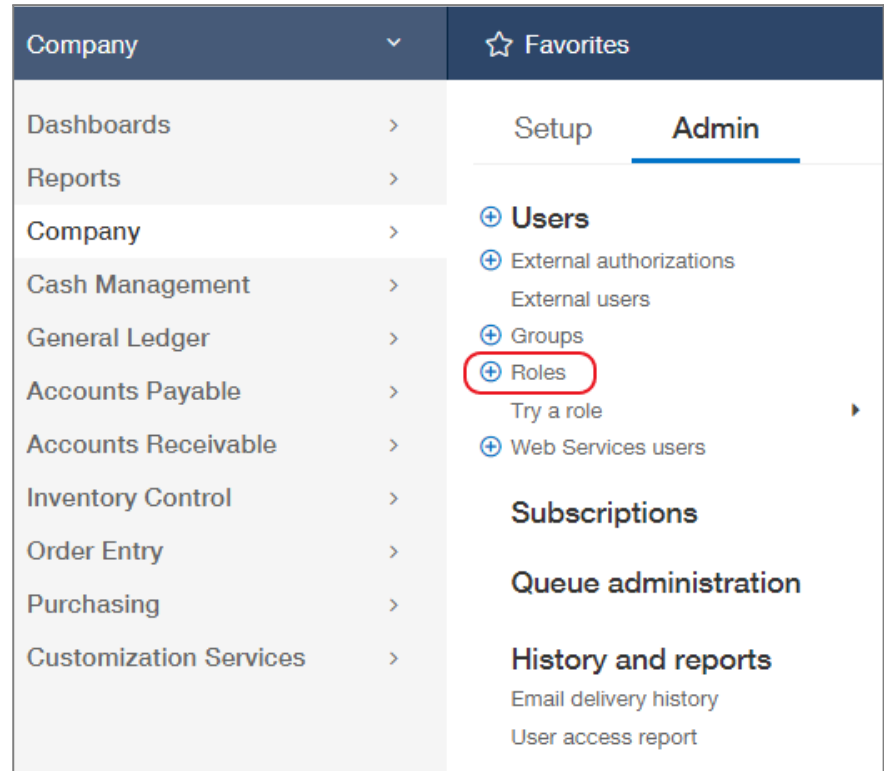
Step 2: Create a new user in Sage Intacct to be used by Workyard for configuring your integration. You can choose between a Role-based or User-based option as per security configuration.

Instructions vary slightly depending on the client defining their security as “Role-Based” or “User-Based”.

Create User with Role-Based Security

Create a Role

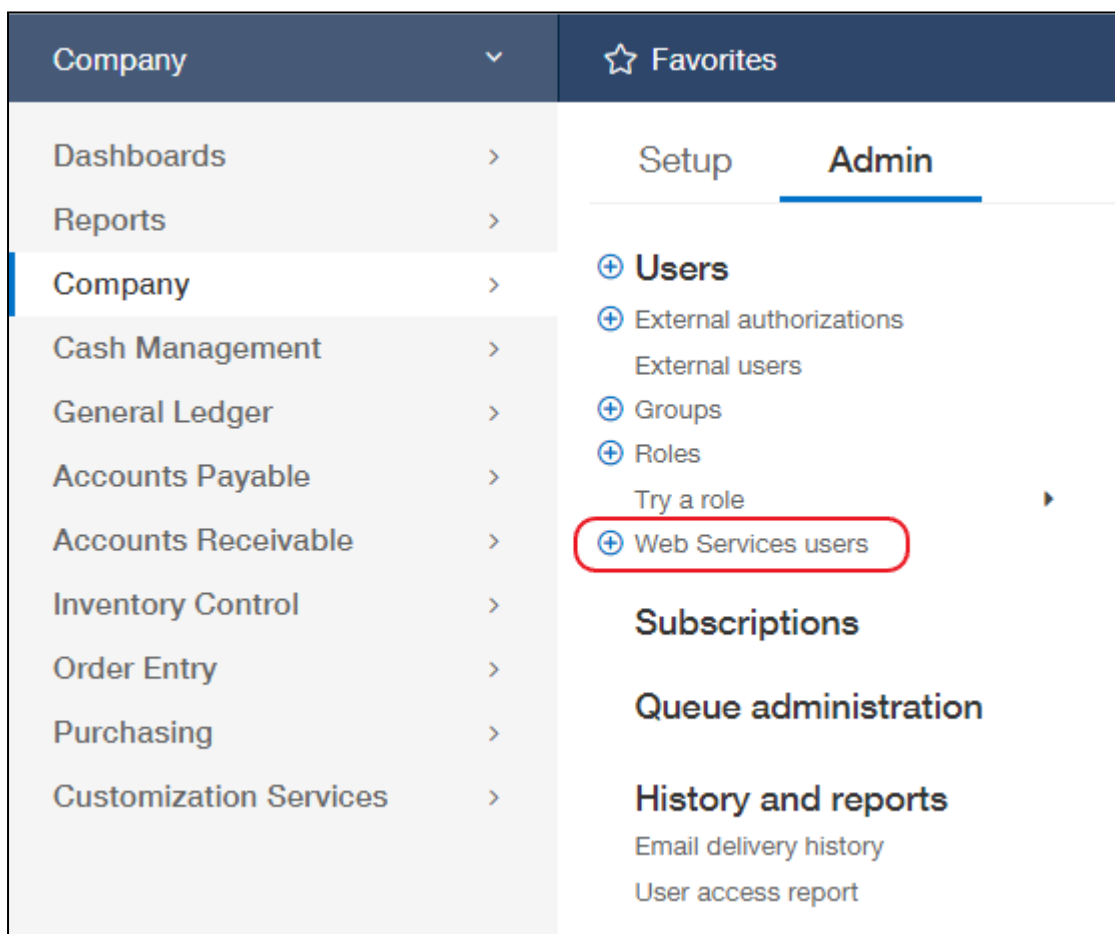
1. Company Roles
2. Click ADD
3. Input a 'Name'
4. Click SAVE
5. Click on the necessary Permissions for each applicable module
6. Click SAVE



Create Web Service User

1. Company Web Service User
2. Click NEW
3. Input values for these fields
 - a. User ID
 - b. Last name
 - c. First name
 - d. Email address
 - e. Make sure the User Type = Business User
4. Click on the 'Roles information' tab and select the Role created in the prior step.
5. Click SAVE

6. Ignore any warning that there will be a charge for creating the User



Create User with User-Based security

Create Web Service User

1. Company Web Service User
2. Click NEW
3. Input values for these fields
 - a. User ID
 - b. Last name
 - c. First name
 - d. Email address
 - e. Make sure the User Type = Business User
4. Click SAVE

Step 3: Assign the required permissions as detailed below to the user created for Workyard to configure the integration.

Add permissions to that new user

1. Sage Intacct will return to the list of Web Service Users
2. Find your Web Service User and click on SUBSCRIPTIONS
3. Click on the necessary Permissions for each applicable module. Workyard needs following permissions for standard configuration - which are part of Project & Resource Management in Sage Intacct:
 - a. Location - Read only
 - b. Project - Read only
 - c. Task - Read only
 - d. Employee - Read only
 - e. Customer - Read only
 - f. Department - Read only
 - g. Vendor - Read only
 - h. Cost Type - Read only
 - i. Timesheet Object - Read/Write
4. Click SAVE

Web Services Users						
All ▾	Manage views ▾					
<input type="checkbox"/> Include inactive	Advanced filters	Clear all filters				
User ID ▾	User name	User type	Admin privileges	Permissions Report		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Subscriptions	View Permissions	
Edit	View	Marketplace Partner	A B	Business User	Full	

Step 4: Finally, share the username and password of the newly created user with Workyard for Workyard to start configuring your integration. The credentials are shared via secure channels as instructed by Workyard’s customer success team.







Additional Advanced Instructions

Specific configuration of certain modules

Please note that the pay period in Workyard should match with payroll period in Sage Intacct module for the integration to work. For example...

- Workyard supports durations of “Weekly”, “Bi-Weekly” and “1st - 15th / 16th - end of the month” etc.. Therefore, the client will need to change the timesheet duration.

Subscriptions

	Inventory Control Emulate your inventory infrastructure for single or multiple warehousing, track your merchandise, and maintain and analyze your inventory information, including vendors per inventory item, reorder levels, quantities, and costs.	Configure	<input checked="" type="checkbox"/>
	Order Entry Create and manage the customer order life cycle from inception through fulfillment, including sales quotes, sales orders, fulfillment orders, sales invoices, credit memos, and any variations on these required by your business.	Configure	<input checked="" type="checkbox"/>
	Projects Manage and track your projects, including associated resources, tasks, and customers; and set up automatic processes, such as timesheet entry and approvals.	Configure	<input checked="" type="checkbox"/>
	Purchasing Create, automate, and manage the purchase order life cycle from inception through receipt, from requests for quote, through receipt of vendor bills. Automatically update costs and set ordering based on factors, such as quantity price breaks and economic order amounts.	Configure	<input checked="" type="checkbox"/>