

The logo for Känverse.ai, featuring a stylized 'K' made of four colored triangles (green, yellow, blue, red) followed by the text 'känverse.ai' in a dark blue sans-serif font.

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The logo for Sage Intacct, with 'sage' in a bright green lowercase sans-serif font and 'Intacct' in a grey lowercase sans-serif font.

# Kanverse - Sage Intacct Integration Guide

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# Introduction:

## Purpose of the Document:

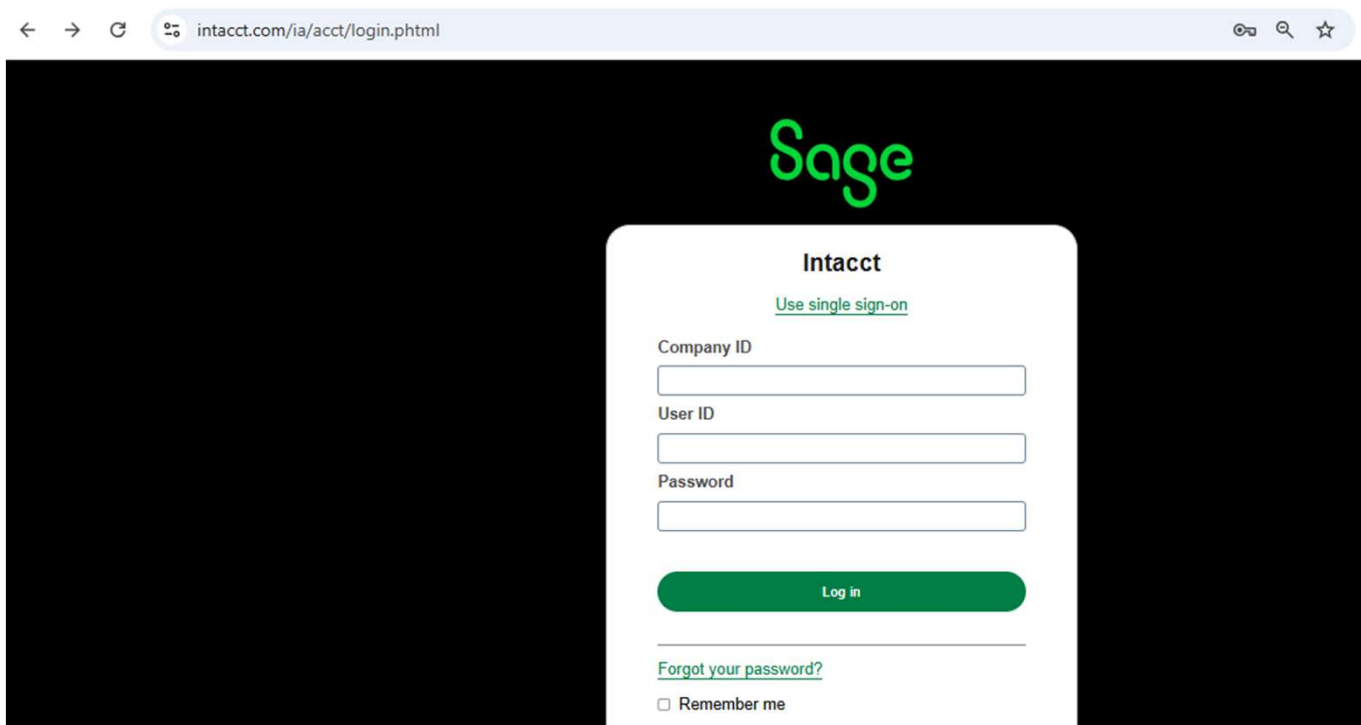
This user guide helps Kanverse implementation developers to configure SAGE INTACCT System. It will help to enable webservice and create webservice users and manage permissions.

For more information go to: <https://developer.intacct.com/web-services/>

## Setup Process

Login to Sage intacct -

1. Go to <https://www.intacct.com/ia/acct/login.phtml>



The screenshot displays a web browser window with the URL [intacct.com/ia/acct/login.phtml](https://www.intacct.com/ia/acct/login.phtml). The page features the Sage logo in green at the top center. Below the logo, the word 'Intacct' is displayed in a smaller font, followed by a link for 'Use single sign-on'. The main content area contains three input fields labeled 'Company ID', 'User ID', and 'Password'. A prominent green 'Log in' button is located below these fields. At the bottom of the form, there is a link for 'Forgot your password?' and a checkbox labeled 'Remember me'.

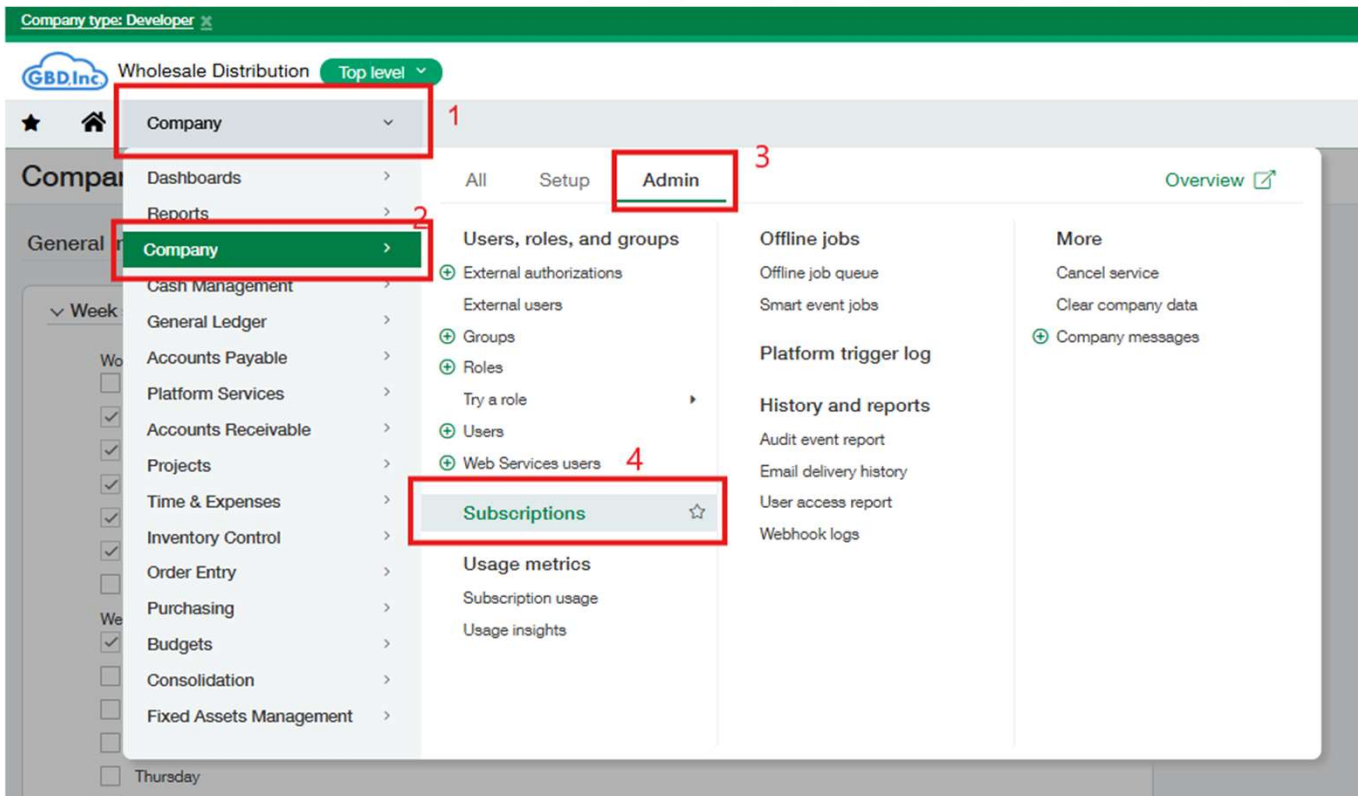
2. Enter company ID -
3. User ID, Password - (These credentials are shared once became Sage partner)
4. Click Log In

# 1

# Enable Web Services Subscription

The company administrator must enable Web Services integration to allow integration. With Web Services, you can leverage the cloud storage and advanced business logic of the Sage Intacct SaaS framework while providing your own customer-facing web application:

a) Navigate to **Company > Admin > Subscriptions**



b) Locate and enable the Web Services subscription



c) Save the changes

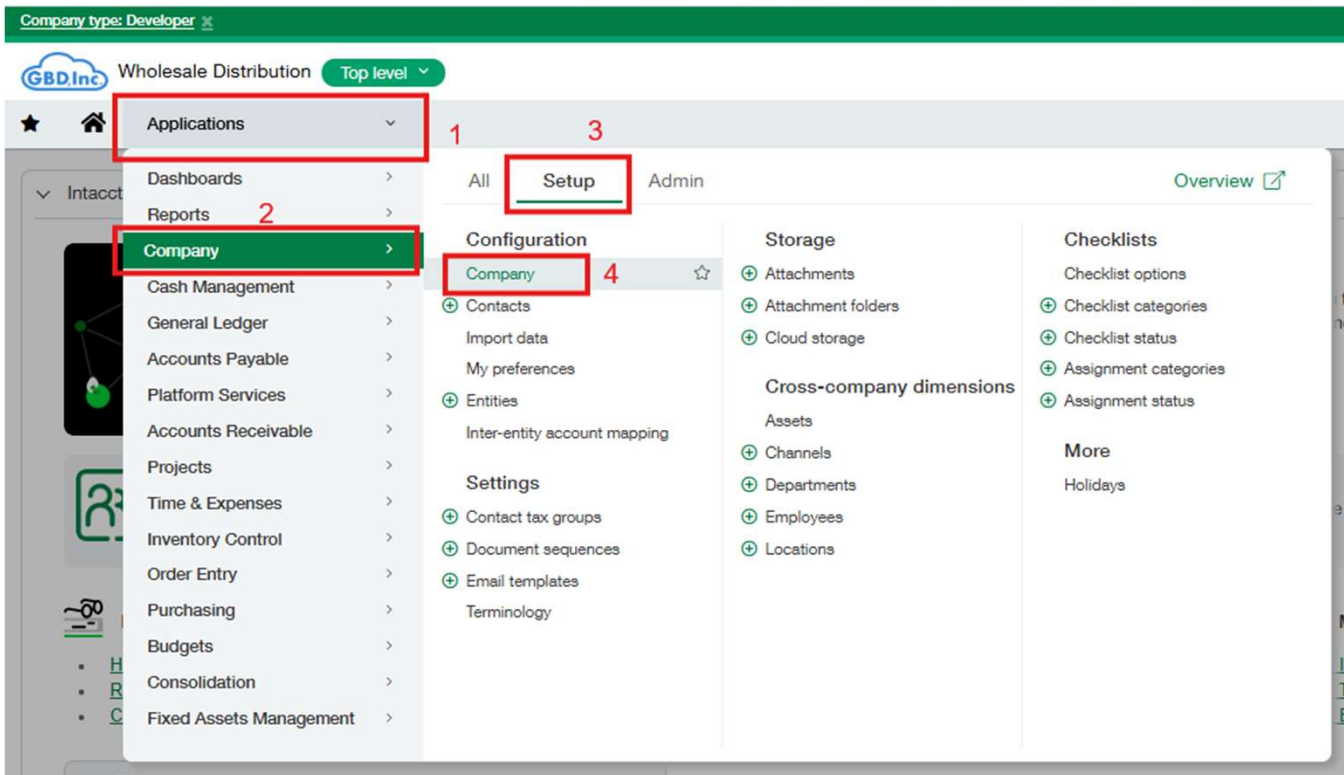
# 2

# Authorize Web Services Sender ID

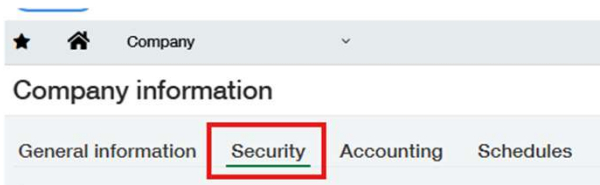
The administrator must explicitly authorize Kanverse Web Services sender ID for the company. This ensures secure access to company data through the API.

Follow these steps to authorize a Web Services sender ID:

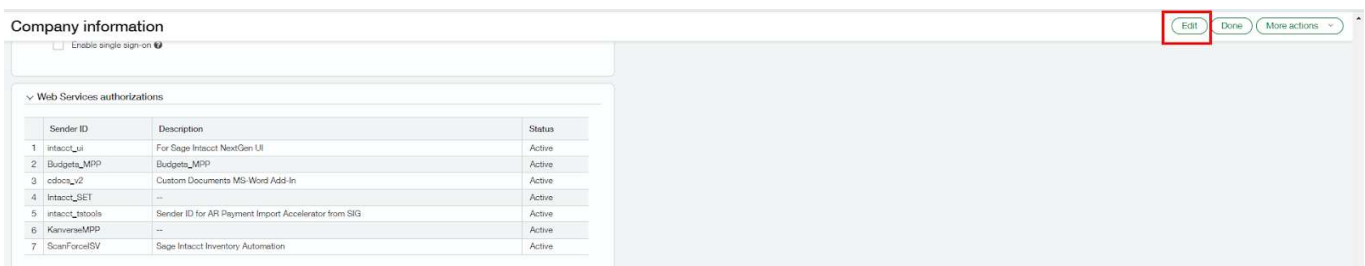
a) Navigate to **Company > Setup > Company**



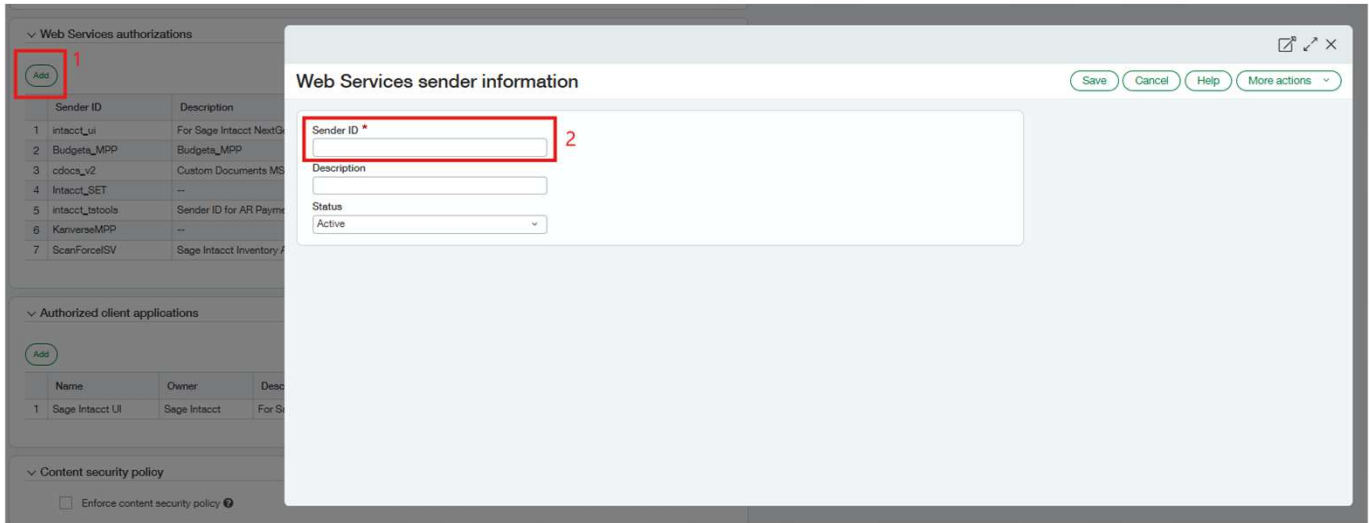
b) Click on the **Security** tab



c) Locate the **Web Services authorizations** section, and click **Edit**



d) Click the **Add** button in **Web Services authorizations**



e) Enter the Sender ID - KanverseMPP

f) Provide a description for the Sender ID (optional but recommended)

g) Click Save to activate the authorization

## 3

## Create Web Service user

It is strongly recommended that you set up a Web Services user account in the Sage Intacct. Web Services users exchange information programmatically with Sage Intacct via Web Services API calls—they are not allowed to log in to the UI.

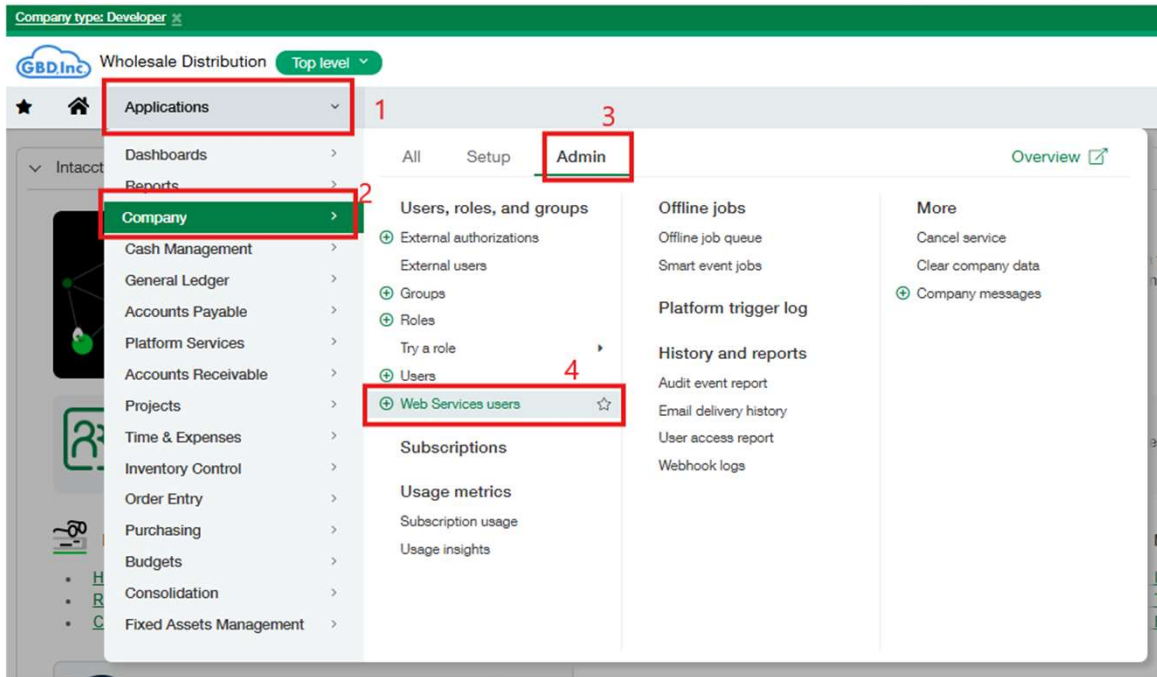
A Web Services user does not provide access to Web Services itself. Rather, a Web Services user is paired with a Web Services sender ID, which is an additional credential that lets you send requests to a Web Services endpoint. You can obtain a sender ID by contacting your Sage Intacct account representative.

For more information check :

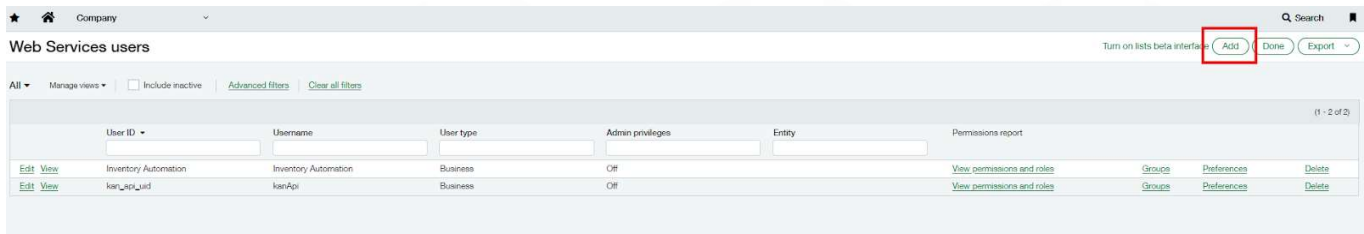
[https://www.intacct.com/ia/docs/en\\_US/help\\_action/Administration/Users/web-services-only-users.htm?cshid=Web\\_services\\_users](https://www.intacct.com/ia/docs/en_US/help_action/Administration/Users/web-services-only-users.htm?cshid=Web_services_users)

To create Webservice user follow this:

a) Navigate to **Company > Admin > Web Service User**



b) Click the **Add** button



c) Fill in the required user information:

The screenshot shows the 'Web Services user information' form. The form is divided into sections: 'User information', 'User entities', 'User departments', and 'User territories'. The 'User information' section contains fields for User ID, Username, Account email address, Status, and Contact name. The 'Sage Intacct Financials permissions' section contains fields for User type and Admin privileges.



- I. User ID
  - II. Username
  - III. Account Email ID
  - IV. Contact Name
- d) Configure user permissions.
- I. User type - Business
  - II. Admin privileges - Off
  - III. Role - AP Manager

e) Click on Save

After saving the Web Services user account an automated email will be sent to the specified account email address, the email contains Web Services User ID, Initial password.

Share the following details with Kanverse via secure channel:

- I. Web Services User ID
- II. Web Services Password

# Thank You

## About Us

Make your Enterprise Future Ready with Kanverse Hyperautomation. Kanverse.ai offers a suite of products that combines AI, and OCR technologies with Automation. Kanverse Intelligent Document Processing (IDP) enables multi-channel ingestion, automated classification, extraction with high accuracy, AI-based analytics, validation against business rules, and automated filing of documents.



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