

Table of Contents

User Guides > Marketplace

[Sage Intacct](#) 2

Sage Intacct

Introduction

The Sage Intacct integration app allows you to sync key financial data between Joblogic and Sage Intacct, including customers, suppliers, invoices, and payments.

It simplifies your financial workflow by syncing essential data between systems. It helps reduce manual entry, maintain data accuracy, and keep your accounts in sync—all with full visibility through audit logs.

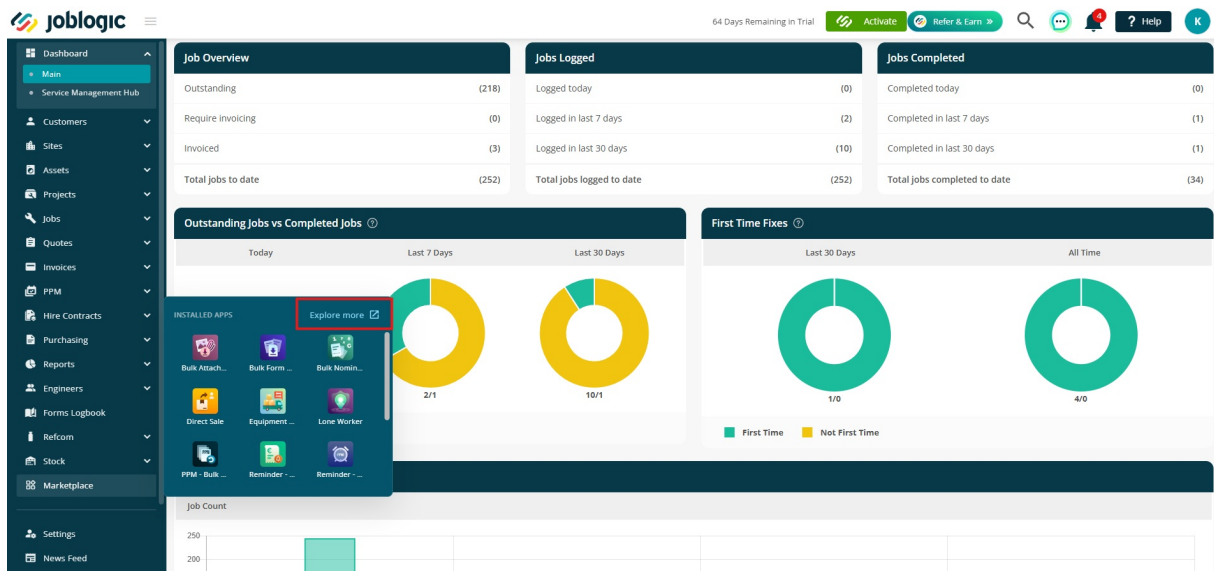
This guide walks you through the setup, syncing process, and features available in the integration.

Accessing the app

Click the Marketplace option on the main menu and then click Sage Intacct, if it appears here.

The screenshot shows the Joblogic dashboard interface. On the left, a dark sidebar menu contains various navigation options. The 'Marketplace' option is highlighted with a red rectangular box. The main content area displays several data panels: 'Job Overview' with a table of job statuses (Outstanding, Require invoicing, Invoiced, Total Jobs to date), 'Jobs Logged' with a table of logging activity (Logged today, Logged in last 7 days, Logged in last 30 days, Total Jobs logged to date), and 'Jobs Completed' with a table of completion activity (Completed today, Completed in last 7 days, Completed in last 30 days, Total Jobs completed to date). Below these are two charts: 'Outstanding Jobs vs Completed Jobs' and 'First Time Fixes', both using donut charts to show progress over different time periods. At the bottom, there is a 'Job Count' bar chart. The top right of the dashboard shows a trial status ('64 Days Remaining in Trial') and navigation links for 'Activate', 'Refer & Earn', 'Help', and user profile.

Alternatively, click Explore More to find it under your My Apps page.



The screenshot shows the Joblogic Marketplace with the following installed apps:

- Industry Pack - Electrical (Subscribed 08/10/2024)
- Industry Pack - Forklift and Heavy lift... (Subscribed 15/10/2024)
- Log Job via Email (Subscribed 10/01/2025)
- Project Management (Subscribed 08/11/2024)
- Reminder - Quotes (Subscribed 21/08/2024)
- Sales Orders (Subscribed 04/10/2024)
- Industry Pack - Facilities Management (Subscribed 14/10/2024)
- Industry Pack - HVACR - Heating, Ve... (Subscribed 18/10/2024)
- Log Quote via Email (Subscribed 21/08/2024)
- Quote Request via your website (Subscribed 26/11/2024)
- Sage 200 Standard Integration (Subscribed 18/10/2024)
- Subcontractor Star Rating (Subscribed 18/10/2024)
- Industry Pack - Fire and Safety (Subscribed 16/10/2024)
- Industry Pack - Water Hygiene (Subscribed 15/10/2024)
- Moduler App Testing (Subscribed 29/05/2025)
- Reminder - PPM (Subscribed 19/09/2024)
- Sage Intacct (Subscribed 14/10/2024)
- TOIL Calculator (Subscribed 14/10/2024)

Initial Setup

First time login

The first time you open the app, you'll be prompted to log in using your Sage Intacct credentials.

You can retrieve these details from your Sage Intacct account.

The image shows a login form for Joblogic Sage Intacct. At the top is the Joblogic logo, followed by the title 'Sage Intacct Credentials' and the instruction 'Please enter your Sage Intacct details below'. The form contains six input fields: 'Company Id', 'User Id', 'User Password', 'Sender Id', and 'Sender Password'. Each field has a placeholder text 'Enter [field name]'. At the bottom of the form is a green 'Submit' button.

Syncing options

Once connected, you'll land on your Synchronisation Portal page. This is where you can manage and track all your sync activity.

From Sage Intacct to Joblogic:

- Customers
- Suppliers
- Tax Codes
- Nominal Codes
- Payments

The screenshot shows six synchronization options, each with a 'Sync Now' button highlighted by a red border:

- Import Customers:** Sync customer data from Sage to JI and JI to Sage, keeping client records always up to date. Ensure accuracy and consistency across platforms.
- Import Nominal & Tax Codes:** Keep your nominal and tax codes in sync between Sage and JI, ensuring all financial categories and taxes remain up to date.
- Export Sales Invoices:** Export your sales invoices from JI to Sage, ensuring your records stay aligned while streamlining your invoicing process.
- Import Suppliers:** Sync your supplier data from Sage to JI and JI to Sage, ensuring supplier records are up to date for better inventory management and purchasing.
- Export Purchase Invoices:** Export your purchase invoices from JI to Sage, keeping your records aligned. Streamline your purchasing process and ensure accuracy.
- Sync Payments:** Sync your payments from Sage to JI, ensuring your financial records are synced and accurate. Streamline financial reporting.

From Joblogic to Sage Intacct:

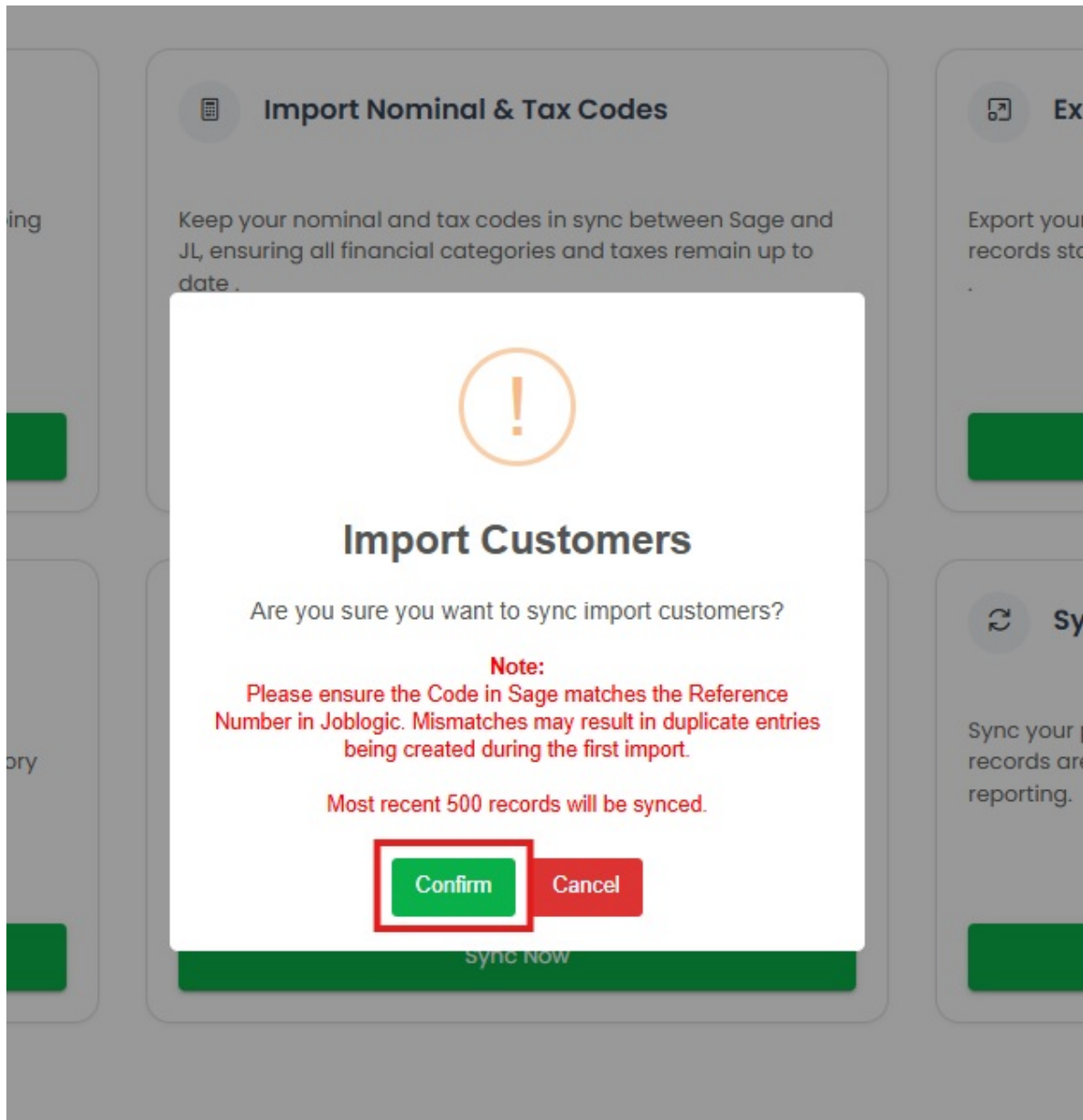
- Customers
- Suppliers
- Sales Invoices
- Purchase Invoices

This screenshot is identical to the previous one, but the 'Sync Now' button for the 'Import Customers' option is highlighted with a red border to indicate the next step in the process.

To begin, click "Sync Now" next to the items you'd like to update.

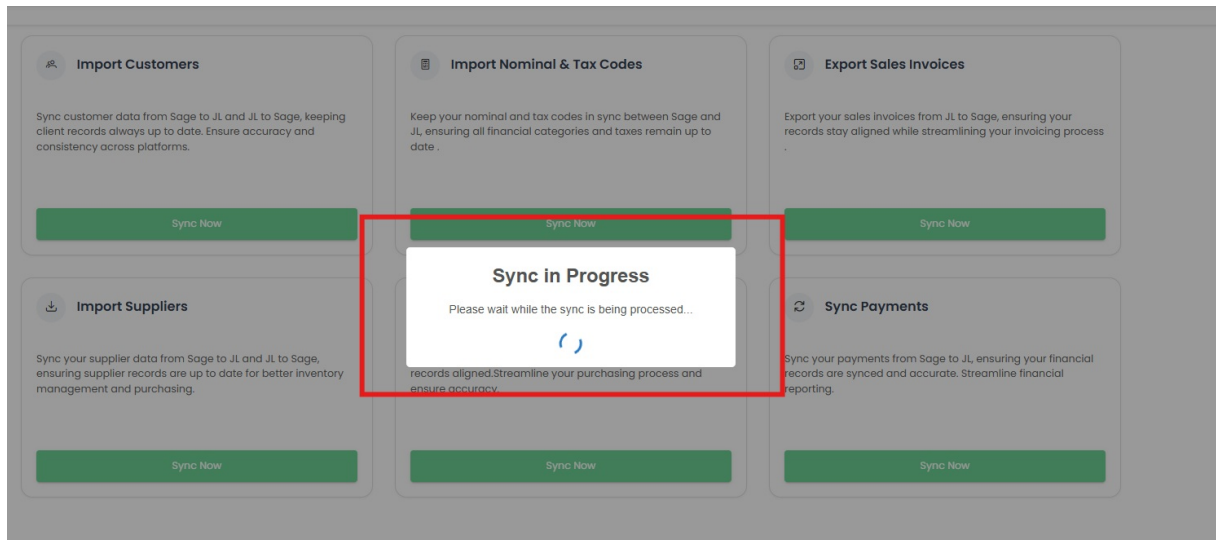
This screenshot is identical to the previous one, but the 'Sync Now' button for the 'Import Customers' option is highlighted with a red border to indicate the next step in the process.

Click Confirm to proceed with the synchronisation.



Once an invoice has been synced to Sage, it will be marked as "Pass to Account" in Joblogic to prevent the same invoice from syncing again.

While a sync is in progress, all sync options will be greyed out until this sync is completed.

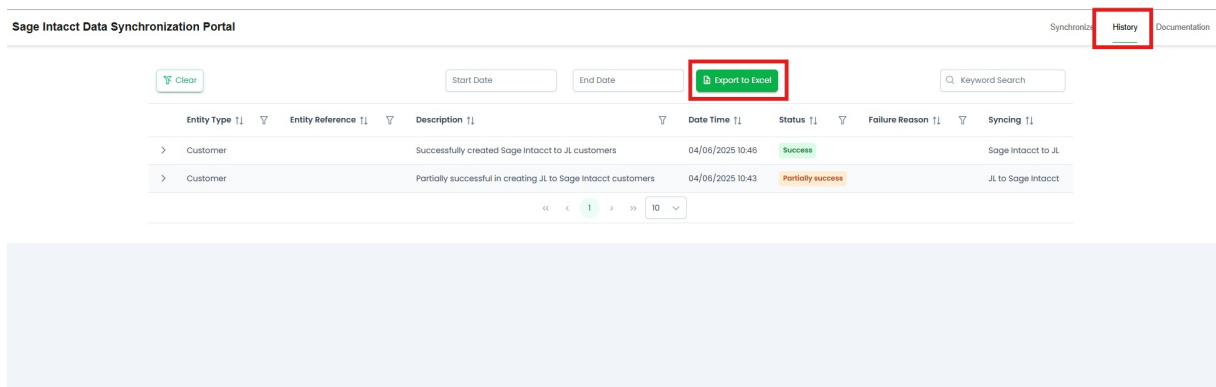


Auditing

You can see an audit of what you have synced via the History tab.

This list will provide you with a list of what has been synced, when and whether it was successful or not. Any failures will include a reason.

Click Export to Excel to download this list for your records, if required.



Further Support

For further information or assistance with the above, contact our Support Team on 0800 326 5561 or email support@joblogic.com. Alternatively, our Customer Success Management team can be reached by emailing customersuccess@joblogic.com

Publishing Details

This document was written and produced by Joblogic's Technical Writing team and was last updated on the date specified above. Be aware that the information provided may be subject to change following further updates on the matter becoming available. Additionally, details within the guide may vary depending on your Joblogic account's user permissions.

