

Marketplace Partners

Configuration Guide for Integration

Marketplace Partners are required to provide Sage Intacct with a Configuration Guide for any integration. Please use this template as an example of a Configuration Guide due at the time of the Technical Integration Review. Your guide will be used as a reference for implementing customers.



CONFIGURATION GUIDE FOR BSI EDI INTEGRATION

Prerequisites

Subscribe to Web Services

Add your company's Sender ID to Sage Intacct's allowed list.

1. Company → Subscriptions
2. Find 'Web Services' and click on it to Subscribe
3. Ignore the warning about additional charges



Web Services

Post and retrieve information using Intacct's XML Gateway from external applications. Additional sender credentials are required to access the XML Gateway. For information on using Web Services, visit developer.intacct.com



IP Address

Add your company's IP Address to Sage Intacct's allowed list. [This is the IP address from which you will launch API requests]

1. Company → Company Info
2. Click EDIT
3. Click on the 'Security' tab
4. Go to the field labeled "Enforce IP address filters" and click the Edit icon

IP Address Filter Information

Add Export ▾

All ▾ Manage views ▾

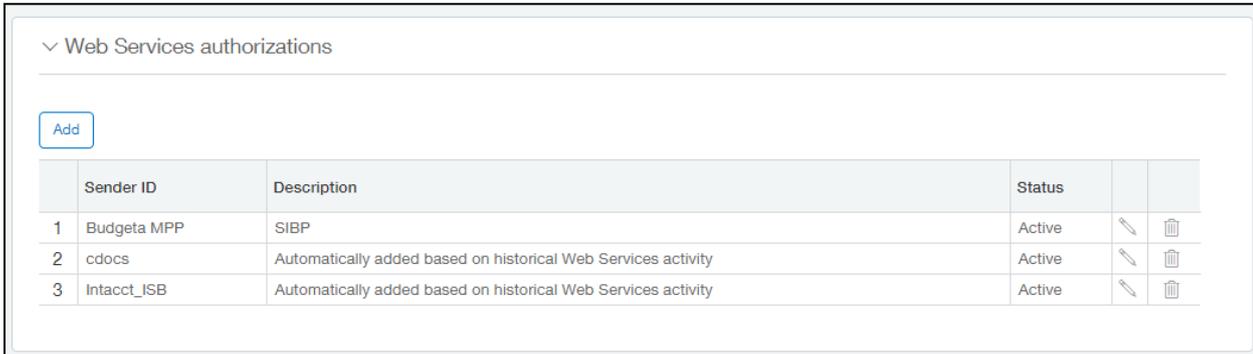
Advanced filters Clear all filters (1 - 2 of 2)

		User name ▲	Start IP address	End IP address	
Edit	View	Sandy	37.3.196.217	37.3.196.217	Delete
Edit	View	Patti	156.21.7.189	156.21.7.189	Delete

Sender ID

Add your BSI's Sender ID to the allowed list.

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 businesssysintegMPP-DEV



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

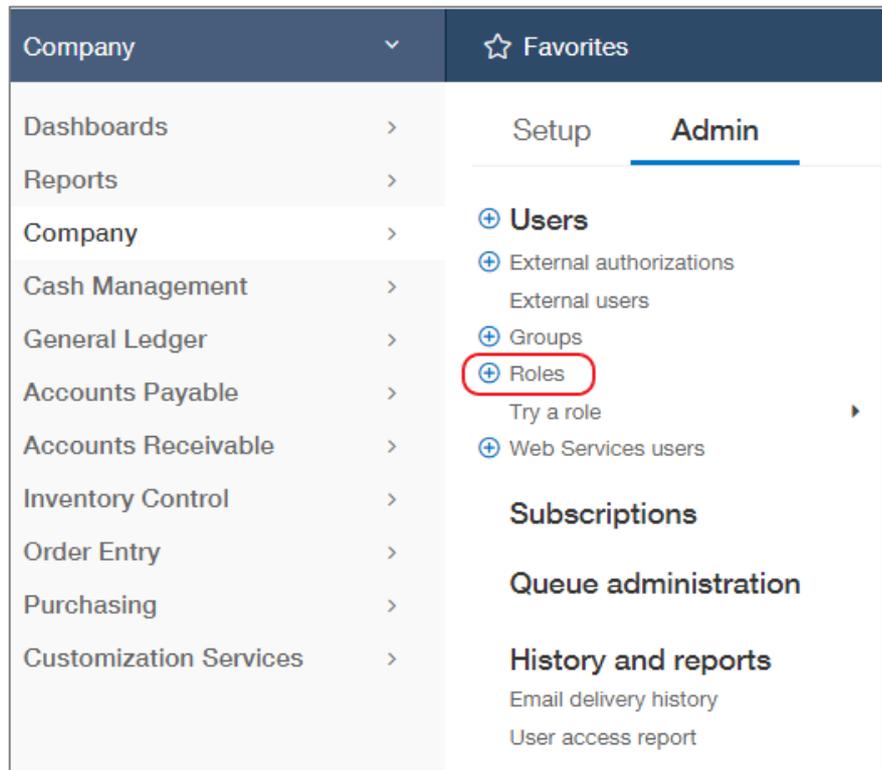
Users

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 'EDIIntegration' for the name
4. Click SAVE
5. Click on the necessary Permissions for each applicable module as shown in the screenshots below.
6. Click SAVE



Company	☆ Favorites
Dashboards >	Setup Admin
Reports >	
Company >	+ Users
Cash Management >	+ External authorizations
General Ledger >	External users
Accounts Payable >	+ Groups
Accounts Receivable >	+ Roles (highlighted)
Inventory Control >	Try a role ▶
Order Entry >	+ Web Services users
Purchasing >	
Customization Services >	
	Subscriptions
	Queue administration
	History and reports
	Email delivery history
	User access report

EDIIntegration Role - Company Permissions

Intacct - Permission Assignment - Google Chrome
 www-p02.intacct.com/ia/acct/rolesubscriptions.phtml?rolekey=13&op=3295&action=perm&popup=1&modkey=co&modop=1&customtitle=&sess=3OT95...

Company Permissions

Save Cancel Help

Activities/Lists	Permission					<input checked="" type="radio"/> None <input type="radio"/> Read Only <input type="radio"/> All
Accounting Periods	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete	
Company Setup Checklist	<input type="checkbox"/> Run					
Clear Company Data	<input type="checkbox"/> Run					
Departments	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete	
Department Groups	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete	
Entities	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete	
Inter-entity account mapping	<input type="checkbox"/> View	<input type="checkbox"/> Edit				
Locations	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete	
Location Groups	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete	
Class	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete	
Class Groups	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete	
Employees	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete	<input type="checkbox"/> Bank Details
Employee Groups	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete	
Employee Rates	<input type="checkbox"/> View					
Employee Types	<input type="checkbox"/> List	<input type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete	
Earning Types	<input type="checkbox"/> List	<input type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete	
Reporting Periods	<input type="checkbox"/> List	<input type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete	
Territory	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete	
Territory Groups	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete	
Document Numbering	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete	
Contact Tax Group	<input type="checkbox"/> List	<input type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete	

EDIIntegration Role – Order Entry Permissions

Intacct - Permission Assignment - Google Chrome

www-p02.intacct.com/ia/acct/rolesubscriptions.phtml?rolekey=13&op=3295&action=perm&.popup=1&.modkey=so&.modop=900&.customtitle=&.sess=30T9...

Order Entry Permissions

Save Cancel Help

Activities/Lists Permission None Read Only All

Activities/Lists	Permission	<input checked="" type="radio"/> None	<input type="radio"/> Read Only	<input type="radio"/> All	
Order Entry Transaction Definitions	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Order Entry Setup					
Customers	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Delete
Customer Groups	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Customer GL Groups	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Items	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Item Groups	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Units Of Measure	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Serial Mask	<input type="checkbox"/> List	<input type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Lot Category	<input type="checkbox"/> List	<input type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Product Line	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Item GL Groups	<input type="checkbox"/> List	<input type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Item Tax Groups	<input type="checkbox"/> List	<input type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Warehouses	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Price Lists	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Fair Value Price Lists	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Price List Entry	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Fair Value Price List Entry	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Price Schedules	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Tax Authority	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Tax Detail	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Tax Schedule	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Tax Schedule Map	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Contacts	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View			
Recurring Transactions	<input type="checkbox"/> List	<input type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Recurring Schedules	<input type="checkbox"/> List	<input type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Order Entry Transactions	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Delete
MEA Allocation	<input type="checkbox"/> View				
Fulfillment	<input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> Edit			
Project Transactions					

EDIIntegration Role – Inventory Control Permissions

Intacct - Permission Assignment - Google Chrome

www-p02.intacct.com/ia/acct/rolesubscriptions.phtml?rolekey=13&op=3295&action=perm&popup=1&modkey=inv&modop=600&customtitle=&sess=3OT...

Inventory Control Permissions

Save Cancel Help

Activities/Lists Permission None Read Only All

Activities/Lists	List	View	Add	Edit	Delete
Inventory Transaction Definitions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inventory Control Setup					
Vendors	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vendor Groups	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Warehouses	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Warehouse Groups	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Product Lines	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Items	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Item Groups	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Item GL Groups	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Item Tax Groups	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Units Of Measure	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Serial Mask	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Zone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Aisle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Row	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bin Size	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bin Face	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lot Category	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Price Lists	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

EDI Integration Role – Purchasing Permissions

Intacct - Permission Assignment - Google Chrome

www-p02.intacct.com/ia/acct/rolesubscriptions.phtml?rolekey=13&op=3295&action=perm&popup=1&modkey=po&modop=850&customtitle=&sess=3OT...

Purchasing Permissions

Save Cancel Help

Activities/Lists Permission None Read Only All

PO Transaction Definitions	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Purchasing Setup					
Purchasing Approval Levels	<input type="checkbox"/> Level 1	<input type="checkbox"/> Level 2	<input type="checkbox"/> Level 3	<input type="checkbox"/> Level 4	<input type="checkbox"/> Level 5 <input type="checkbox"/> Level 6
Approve Purchase Transaction	<input type="checkbox"/> List				
Vendors	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Vendor Groups	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Vendor GL Groups	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Items	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Item Groups	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Units Of Measure	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Serial Mask	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Lot Category	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Product Line	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Item GL Groups	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Item Tax Groups	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Warehouses	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Price Lists	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Price Schedules	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Price List Entry	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Tax Detail	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Tax Schedule	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Tax Schedule Map	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Contacts	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View			
Recurring Transactions	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete
Purchasing Transactions	<input checked="" type="checkbox"/> List	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Add	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Delete
Print Email Documents	<input type="checkbox"/> Print				

Create Web Service User

1. Company → Web Service User
2. Click NEW
3. Input values for these fields
 - a. User ID – set this to “BSIEDI”
 - b. Last name – set this to “EDI”
 - c. First name – set this to “BSI”
 - d. Email address – set this to “onboarding@BusinessSysInteg.com”
 - e. Make sure the User Type = Business User
4. Click on the ‘Roles information’ tab and select the “EDIIntegration” Role created in the prior step.
5. Click SAVE
6. Ignore any warning that there will be a charge for creating the User

The screenshot displays the Sage system navigation interface. On the left, a vertical menu lists various system components: Company, Dashboards, Reports, Cash Management, General Ledger, Accounts Payable, Accounts Receivable, Inventory Control, Order Entry, Purchasing, and Customization Services. The 'Company' item is selected, and its sub-menu is expanded on the right. This sub-menu includes 'Users', 'External authorizations', 'Groups', 'Roles', 'Try a role', and 'Web Services users'. The 'Web Services users' option is highlighted with a red rectangular box. Below the 'Web Services users' section, there are sections for 'Subscriptions', 'Queue administration', and 'History and reports'.

Create User with User-Based security

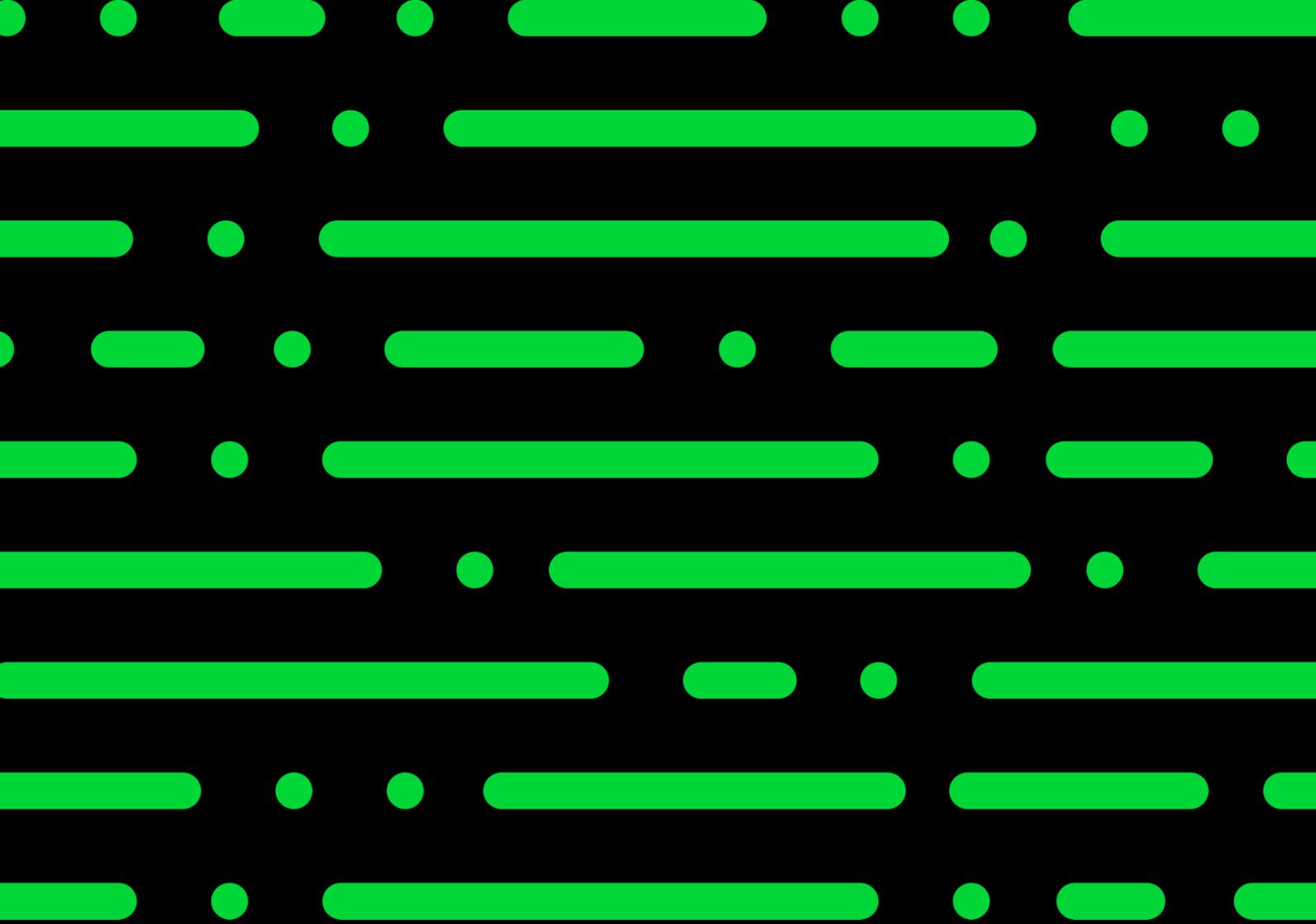
Create Web Service User

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

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
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		



[sage.com](https://www.sage.com)

Sage

©2022 THE SAGE GROUP PLC OR ITS LICENSORS. SAGE, SAGE LOGOS, SAGE PRODUCT AND SERVICE NAMES MENTIONED HEREIN ARE THE TRADEMARKS OF THE SAGE GROUP PLC OR ITS LICENSORS. ALL OTHER TRADEMARKS ARE THE PROPERTY OF THEIR RESPECTIVE OWNERS.