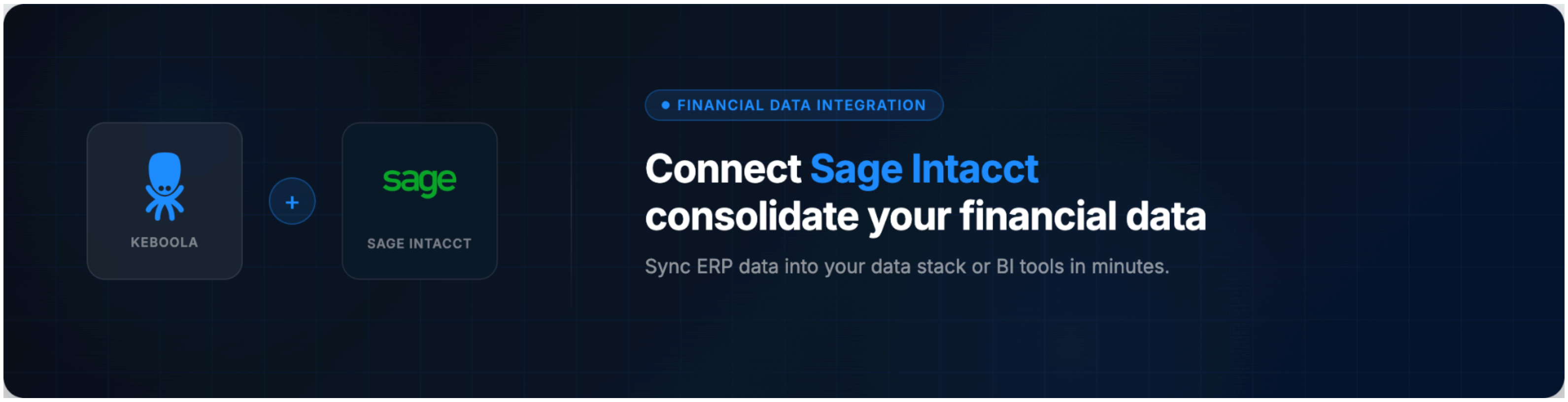

Keboola Sage Intacct Connector – Configuration Guide

Extractor & Writer | Built by Keboola

Prerequisites

Before connecting Keboola to Sage Intacct, complete the following steps in your Sage Intacct account.

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1. Enable Web Services Subscription

1. Go to **Company** > **Admin** > **Subscriptions**
2. Find **Web Services** and click to subscribe
3. Ignore the warning about additional charges

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2. Create an OAuth Application

Follow the Sage Intacct quick start guide:
https://developer.sage.com/intacct/docs/1/sage-intacct-rest-api/get-started/quick-start

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3. Add Sender ID to Allowed List

1. Go to **Company** > **Company Info**
2. Click **Edit**
3. Open the **Security** tab
4. Find the **Web Services Authorizations** section
5. Add the Keboola Sender ID

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4. Authorize the Client Application (REST API)

Add your application's Client ID to the allowed list. Use the Client ID from your Production API keys.

1. Go to **Company** > **Company Info**
2. Click **Edit**
3. Open the **Security** tab
4. In the **Authorized Client Applications** section, click **Add**
5. Enter your application's Client ID (e.g. a7fc06f71349f36bb725.app.sage.com)
6. Enter the Web Services User ID (case-sensitive)

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5. Add IP Address to Allowed List

Add the Keboola IP address to Sage Intacct's allowed list. The IP address depends on your Keboola stack.

Find your stack's IP addresses here: https://help.keboola.com/components/ip-addresses/

1. Go to **Company** > **Company Info**
2. Click **Edit**
3. Open the **Security** tab
4. Find the **Enforce IP address filters** field and click the Edit icon

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6. Create a Web Services User

Instructions vary depending on whether your Sage Intacct uses Role-Based or User-Based security.

Option A: Role-Based Security

Create a Role:

1. Go to **Company** > **Roles**
2. Click **Add**
3. Enter a name and click **Save**
4. Select the necessary permissions for each applicable module
5. Click **Save**

Create a Web Services User:

1. Go to **Company** > **Web Service User**
2. Click **New**
3. Fill in: User ID, Last name, First name, Email address
4. Set User Type to **Business User**
5. Open the **Roles Information** tab and assign the role created above

6. Click **Save**
7. Ignore any warning about charges for creating a user

Option B: User-Based Security

Create a Web Services User:

1. Go to **Company** > **Web Service User**
2. Click **New**
3. Fill in: User ID, Last name, First name, Email address
4. Set User Type to **Business User**
5. Click **Save**

Add Permissions:

1. Find your new Web Services User in the list
2. Click **Subscriptions**
3. Select the necessary permissions for each applicable module
4. Click **Save**

Setting Up the Connector in Keboola

1. In your Keboola project, go to **Components** > **Add New Component**
2. Search for **Sage Intacct** and select **Data Source** (extractor) or **Data Destination** (writer)
3. Create a new configuration
4. Fill in the authorization section. The entity parameter is optional.
5. Configure individual rows according to the documentation:
    - **Extractor:** https://github.com/keboola/component-sage-intacct-extractor/blob/main/README.md
    - **Writer:** https://github.com/keboola/component-sage-intacct-writer/blob/initial-implementation/README.md

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Important Notes

- The customer is responsible for API usage. Tier 1 billing includes 100,000 API calls per month.
- Use large batch sizes, optimal sync frequency, and incremental load to minimize API consumption.
- Monitor your API usage in the Sage Developer Portal under your app details. The portal refreshes twice a day.
- A paid sandbox instance is available on request. This is recommended for configuring the writer.