

Constructable to Sage Intacct Data Mapping Guide

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How to Read This Guide

This guide describes how Constructable and Sage Intacct Construction exchange data: which records sync, in which direction, and how each field maps. Arrows show the direction data flows.

 Sage Intacct to Constructable
  Constructable to Sage Intacct

Records sync in dependency order so that every record's related records are linked first: companies, projects, cost codes and cost types, revenue codes, prime contracts, commitments and change orders, budgets, and finally invoices and costs.

Rows marked "Set automatically" are fixed values written by the integration rather than copied from the other system.

Companies

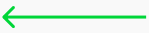
Active Sage Intacct customers and vendors are imported as Constructable companies. Existing Constructable companies are linked by matching name.

Customer to Owner Company

CONSTRUCTABLE	DATA FLOW	SAGE INTACCT
Company Name		Customer Name
Address Line 1		Mailing Address Line 1
Address Line 2		Mailing Address Line 2
City		City
State		State
Postal Code		ZIP / Postal Code
Country		Country
Phone		Primary Phone
Website		URL
Company Type: Owner		Set automatically

Vendor to Subcontractor Company

Vendors map with the same fields as customers.

CONSTRUCTABLE	DATA FLOW	SAGE INTACCT
Company Name		Vendor Name
Address, City, State, Postal Code, Country		Mailing Address
Phone		Primary Phone
Website		URL
Company Type: Subcontractor		Set automatically

Projects

Sage Intacct projects are imported into Constructable. Existing Constructable projects are linked by project number, then by name.

Preconditions for Project Sync

- Sage Intacct project has a name
- If a project department filter is configured, the project belongs to one of those departments

CONSTRUCTABLE	DATA FLOW	SAGE INTACCT
Project Number	←	Project ID
Project Name	←	Project Name
Project Stage	←	Project Status In Progress or Active: Course of Construction. Pre-Contract: Bidding. Completed, Lost, Archived.
Address	←	Project Address Custom Fields Configured in Integration Settings
Hidden	←	Status Inactive projects are hidden
Budget Type: Fully Defined	←	Set automatically on create

Cost Codes and Cost Types

Sage Intacct standard tasks and standard cost types become organization-wide Constructable cost codes and cost types. Project tasks and project cost types determine which codes are active on each project.

Standard Task to Cost Code

CONSTRUCTABLE	DATA FLOW	SAGE INTACCT
Cost Code	←	Standard Task ID
Cost Code Title	←	Standard Task Name
Parent Cost Code	←	Parent Standard Task

Standard tasks listed in Ignored Cost Codes, and their children, are not imported.

Standard Cost Type to Cost Type

CONSTRUCTABLE	DATA FLOW	SAGE INTACCT
Cost Type Code	←	Standard Cost Type ID
Cost Type Name	←	Standard Cost Type Name

Project Task to Project Cost Code

CONSTRUCTABLE	DATA FLOW	SAGE INTACCT
Project	←	Project
Cost Code	←	Standard Task

Project Cost Type to Project Cost Type

CONSTRUCTABLE	DATA FLOW	SAGE INTACCT
Project	←	Project
Project Cost Code	←	Task
Cost Type	←	Standard Cost Type

Revenue Codes and Markups

Project contract lines define Constructable revenue codes and the cost codes they bill against. Rate tables become change order markups.

Project Contract Line to Revenue Code

CONSTRUCTABLE	DATA FLOW	SAGE INTACCT
Revenue Code	←	Contract Line ID
Revenue Code Title	←	Contract Line Name
Project Revenue Code	←	Contract Line Added to each project that uses the line

Contract Line Task Map to Revenue Code Cost Code

CONSTRUCTABLE	DATA FLOW	SAGE INTACCT
Project	←	Project
Revenue Code	←	Project Contract Line
Cost Code	←	Task

Rate Table to Change Order Markup

CONSTRUCTABLE	DATA FLOW	SAGE INTACCT
Markup Name	←	Rate Table ID
Markup Rate	←	Markup Percent Custom Field
Archived	←	Status Inactive rate tables are archived

Only rate tables with a markup percent value are imported.

Missing Records

When Constructable needs a project-level record that doesn't exist in Sage Intacct yet, it creates that record in Sage Intacct so commitments, change orders, and budgets can sync. These records are created once and aren't updated afterward.

Project Cost Code to Project Task

CONSTRUCTABLE	DATA FLOW	SAGE INTACCT
Project	→	Project
Cost Code	→	Standard Task
Cost Code	→	Task ID
Cost Code Title	→	Task Name

Project Cost Type to Project Cost Type

CONSTRUCTABLE	DATA FLOW	SAGE INTACCT
Project	→	Project
Cost Code	→	Task
Cost Type	→	Standard Cost Type
Cost Type Name	→	Name
Cost Type	→	Item ID Cost Type to Item ID setting
Cost Type	→	GL Account Cost Type to GL Account setting

Revenue Code Cost Code to Contract Line Task Map

CONSTRUCTABLE	DATA FLOW	SAGE INTACCT
Project	→	Project
Revenue Code	→	Project Contract Line Time and material lines only
Cost Code	→	Task

Schedule of Values Line to Project Contract Line

Created when an executed change order adds a revenue code that isn't on the Sage Intacct project contract yet.

CONSTRUCTABLE	DATA FLOW	SAGE INTACCT
Revenue Code	→	Contract Line ID
Revenue Code Title	→	Contract Line Name
Prime Contract	→	Project Contract
Project	→	Project
Billing Type	→	Billing Type Progress Bill or Time and Material
Retainage %	→	Retainage %
Change Order Markup	→	Default Rate Table
Revenue GL Account Integration setting	→	GL Account
Prime Change Order Item ID Integration setting	→	Item ID
From the Sage Intacct project	→	Department and Location
Date created	→	Contract Line Date

Prime Contracts

Sage Intacct project contracts are imported as executed Constructable prime contracts, and their contract lines become the schedule of values.

Preconditions for Prime Contract Sync

- Project is linked to Sage Intacct
- Customer is linked to a Constructable owner company
- Each contract line ID matches a Constructable revenue code

Project Contract to Prime Contract

CONSTRUCTABLE	DATA FLOW	SAGE INTACCT
Contract Number	←	Contract ID
Contract Name	←	Contract Name
Contract Date	←	Contract Date
Scope of Work	←	Scope Falls back to Description
Project	←	Project
Owner Company	←	Customer
Default Markup Rate	←	Markup Rate Custom Field
Status: Executed	←	Set automatically

Project Contract Line to Schedule of Values Line

CONSTRUCTABLE	DATA FLOW	SAGE INTACCT
Prime Contract	←	Project Contract
Revenue Code	←	Contract Line ID
Description	←	Description Falls back to Name
Scheduled Value	←	Original Price + Revision Price
Retainage %	←	Retainage %
Billing Type	←	Billing Type Progress Bill or Time and Material
Change Order Markup	←	Default Rate Table Time and material lines

Prime Change Orders

Executed prime change orders in Constructable are sent to Sage Intacct as a posted project change order, with a matching change request that carries the line detail.

Preconditions for Prime Change Order Sync

- Change order is Executed in Constructable
- Project and prime contract are linked to Sage Intacct
- Each line's schedule of values line is linked to a project contract line
- Each line's cost code and cost type exist on the Sage Intacct project
- Prime Change Order Item ID is configured in Integration Settings

Prime Change Order to Project Change Order

CONSTRUCTABLE	DATA FLOW	SAGE INTACCT
Project	→	Project
Title	→	Description
Executed Date	→	Change Order Date
Executed Date	→	Price Effective Date
Set automatically	→	State: Posted
Prime Change Order Item ID setting	→	Item ID
Approved Change Request Status setting	→	Change Request Status
ERP ID Saved after creation	←	Change Order ID

Prime Change Order to Change Request

CONSTRUCTABLE	DATA FLOW	SAGE INTACCT
Project	→	Project
Prime Change Order	→	Project Change Order
Prime Contract	→	Project Contract
Title	→	Description
Executed Date	→	Change Request Date
Set automatically	→	State: Posted

Change Order Line to Change Request Line

CONSTRUCTABLE	DATA FLOW	SAGE INTACCT
Schedule of Values Line	→	Project Contract Line
Amount	→	Price
Cost	→	Cost
Description	→	Memo
Cost Code	→	Task
Cost Type	→	Cost Type
Cost Type	→	Item ID Cost Type to Item ID setting
Owner Company	→	Customer
Project	→	Project
Set automatically	→	Workflow Type: Approved Change

The direction can be reversed during setup. Posted Sage Intacct project change orders are then imported as executed Constructable prime change orders, with line detail from their change requests.

Budgets

The original budget comes from the Sage Intacct project estimate. Budget modifications made in Constructable are sent back to that estimate as revisions.

Project Estimate (Original) to Original Budget

CONSTRUCTABLE	DATA FLOW	SAGE INTACCT
Project	←	Project
Cost Code	←	Task
Cost Type	←	Cost Type
Amount	←	Amount
Currency	←	Currency
Description	←	Memo Falls back to Description

Only estimate lines with the Original workflow type are imported. The original budget is locked after import.

Budget Modification to Project Estimate (Revision)

CONSTRUCTABLE	DATA FLOW	SAGE INTACCT
Project	→	Project
Cost Code	→	Task
Cost Type	→	Cost Type
Amount	→	Amount
Description	→	Memo
Change Order Executed Date Falls back to date created	→	Effective Date
Set automatically	→	Workflow Type: Revision
Set automatically	→	Project Estimate The project's primary estimate

The direction can be reversed during setup. Sage Intacct revision lines are then imported as a Constructable budget modification.

Commitments

Executed subcontracts and purchase orders in Constructable are created in Sage Intacct as purchasing documents, using the document types configured in Integration Settings.

Preconditions for Commitment Sync

- Subcontract or purchase order is Executed in Constructable
- Commitment has at least one schedule of values line
- Project is linked to Sage Intacct
- Subcontractor company is linked to a Sage Intacct vendor
- Each line's cost code and cost type exist on the Sage Intacct project
- Each cost type is mapped to an Item ID

Subcontract or Purchase Order to Purchasing Document

CONSTRUCTABLE	DATA FLOW	SAGE INTACCT
Contract Number	→	Document Number
Contract Date Falls back to date created	→	Transaction Date
Commitment Name	→	Memo
Project Number	→	Reference Number
Project	→	Project
Subcontractor Company	→	Vendor
From the Sage Intacct project	→	Currency
Set automatically	→	State: Pending
Purchasing Document Types setting	→	Document Type
ERP ID Saved after creation	←	Document Number

Schedule of Values Line to Purchasing Document Line

CONSTRUCTABLE	DATA FLOW	SAGE INTACCT
Description	→	Memo
Amount	→	Unit Price
Unit from Purchasing Line Unit setting	→	Quantity: 1 and Unit
Cost Code	→	Task
Cost Type	→	Cost Type
Cost Type	→	Item ID Cost Type to Item ID setting
Amount × Retainage %	→	Retainage Amount
Project	→	Project
From the Sage Intacct project	→	Location, Department, and Customer

Documents are created once and aren't updated after conversion in Sage Intacct. The direction can be reversed during setup to import Sage Intacct purchasing documents as commitments.

Commitment Change Orders

Executed subcontract and purchase order change orders are created in Sage Intacct as purchasing change orders against the linked commitment.

Preconditions for Change Order Sync

- Change order is Executed in Constructable
- Parent commitment is linked to a Sage Intacct purchasing document
- Project and vendor are linked to Sage Intacct
- Change order has at least one line
- Each line's cost code and cost type exist on the Sage Intacct project

Change Order to Purchasing Change Order

CONSTRUCTABLE	DATA FLOW	SAGE INTACCT
Executed Date Falls back to date created	→	Transaction Date
Project Number	→	Reference Number
Project	→	Project
Subcontractor Company	→	Vendor
Commitment	→	Related Document
From the parent purchasing document	→	Retainage %
From the parent payment terms	→	Due Date
Set automatically	→	State: Closed
Purchasing Document Types setting	→	Document Type
ERP ID Saved after creation	←	Document Number

Change Order Line to Purchasing Change Order Line

CONSTRUCTABLE	DATA FLOW	SAGE INTACCT
Description	→	Memo
Amount	→	Unit Price
Schedule of Values Line	→	Related Document Line
Cost Code	→	Task
Cost Type	→	Cost Type
Cost Type	→	Item ID Cost Type to Item ID setting
Retainage %	→	Retainage
Set automatically	→	Quantity: 1 and Unit

The direction can be reversed during setup. Sage Intacct purchasing change orders are then imported as executed Constructable change orders.

Owner Invoices

Sage Intacct project contract billing invoices are imported as Constructable owner invoices against the prime contract.

Preconditions for Owner Invoice Sync

- AR invoice is Posted, Partially Paid, or Paid
- Project, project contract, and contract lines are linked to Constructable

AR Invoice to Owner Invoice

CONSTRUCTABLE	DATA FLOW	SAGE INTACCT
Invoice Number	←	AR Invoice Number Falls back to billing application number
Invoice Date	←	Billing Through Date
Billing Period	←	Billing Through Date Month containing the date
Status	←	AR State Paid: Paid. Posted or Partially Paid: Approved.
Prime Contract	←	Project Contract
Project	←	Project

Billing Detail to Owner Invoice Line

CONSTRUCTABLE	DATA FLOW	SAGE INTACCT
Schedule of Values Line	←	Project Contract Line
Work Completed This Period	←	Completed This Period
Materials Presently Stored	←	Stored Materials
Retainage	←	Amount Retained
Retainage Released	←	Retainage Billed

Costs

Actual costs come from Sage Intacct AP bills and general ledger journal entries.

Preconditions for Bill Sync

- Bill is Posted, Partially Paid, or Paid
- Bill uses an invoice document type configured in Integration Settings
- Vendor is linked to a subcontractor company on the project
- APRET retainage bills are excluded when that setting is on

AP Bill to Subcontractor Invoice

Bill lines that reference a linked subcontract, purchase order, or change order.

CONSTRUCTABLE	DATA FLOW	SAGE INTACCT
Invoice Number	←	Bill ID
Invoice Date	←	Posting Date
Status	←	State Paid: Paid. Posted or Partially Paid: Approved.
Commitment	←	Purchasing Document
Project	←	Project
Schedule of Values Line	←	Purchasing Document Line
Work Completed This Period	←	Line Amount
Retainage	←	Amount Retained
Retainage Released	←	Line Amount Lines on the Retainage Payable GL account

AP Bill Line to Other Cost

Bill lines that have a task but don't reference a commitment.

CONSTRUCTABLE	DATA FLOW	SAGE INTACCT
Reference Number	←	Bill ID
Description	←	Bill ID and Vendor Name
Date	←	Posting Date
Company	←	Vendor
Cost Code	←	Task
Cost Type	←	Cost Type
Amount	←	Line Amount
Memo	←	Line Memo

GL Journal Entry Line to Other Cost

Journal entry lines posted to GL accounts in the Cost Type to GL Account setting. Amounts already covered by synced commitments or bills are excluded.

CONSTRUCTABLE	DATA FLOW	SAGE INTACCT
Reference Number	←	Journal Entry
Description	←	Journal Entry Description
Date	←	Entry Date Falls back to posting date
Company	←	Vendor Falls back to "Sage Intacct Journal Entry"
Expense Type	←	Employee Payroll when an employee is set, otherwise Invoice
Project	←	Project
Cost Code	←	Task Falls back to the Default Cost Codes setting
Cost Type	←	Cost Type Falls back to the GL account's cost type
Amount	←	Transaction Amount Credits are negative
Memo	←	Line Description

Integration Settings Reference

These settings are configured for each Sage Intacct connection during setup. They control document types, default values, and how Constructable codes translate into Sage Intacct items and accounts.

SETTING	WHAT IT CONTROLS
Purchasing Document Types	Sage Intacct purchasing transaction definitions used for subcontracts, purchase orders, change orders, purchase order change orders, and invoices. Defaults: Constructable Subcontracts, Constructable Purchase Orders, Constructable Change Orders.
Cost Type to Item ID	Maps each Constructable cost type to a Sage Intacct Item ID. Applied to commitment, change order, and change request lines.
Cost Type to GL Account	Maps each cost type to a GL account. Used for new project cost types and to choose which GL accounts are imported as other costs.
Purchasing Line Unit	Unit of measure on purchasing document lines. Default: EA.
Prime Change Order Item ID	Item ID on project change orders and on project contract lines created by Constructable.
Revenue GL Account	GL account on project contract lines created by Constructable.
Approved Change Request Status	Status assigned to change requests created by Constructable.
Retainage Payable GL Account	Bill lines posted to this account are imported as retainage releases. Default: 21120.
Exclude APRET Retainage Bills	Optionally excludes APRET retainage bills from actual costs.
Project Address Fields	Sage Intacct project custom fields read as the project address. Defaults: PROJECT_ADDRESS, PROJECT_CITY.
Markup Custom Fields	Custom fields read as the rate table markup percent and the project contract default markup rate. Defaults: MARKUP_PERCENT, MARKUP_RATE.
Project Department Filter	Optionally imports only projects in selected Sage Intacct departments.
Ignored Cost Codes	Standard tasks, and their children, that are not imported.
Default Cost Codes	Cost code used when the Sage Intacct task is blank on journal entries or prime change orders.
Entity and Private Records	Sage Intacct entity used for creates and updates, and whether records from private entities are included.