



Connecting Shogo to Sage Intacct (PDF)

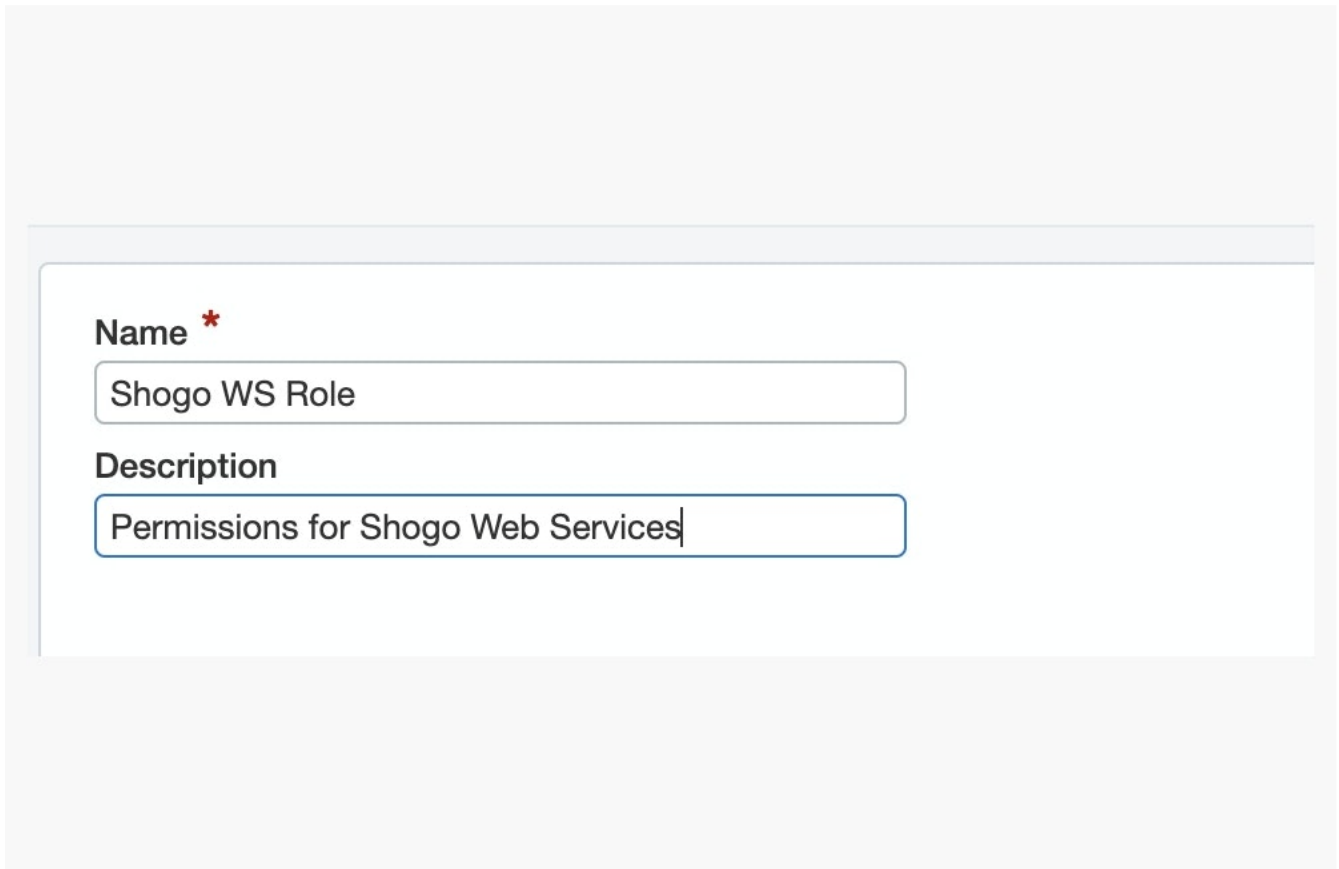
Connecting Shogo to Sage Intacct

In order for Shogo to access your Sage Intacct company's data, we need to set up a Web Services User Role and Web Services User and then gather some information from Sage Intacct including your Company ID.

Next: Set up Web Services User Role →

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Create Web Services Role



Name *

Shogo WS Role

Description

Permissions for Shogo Web Services

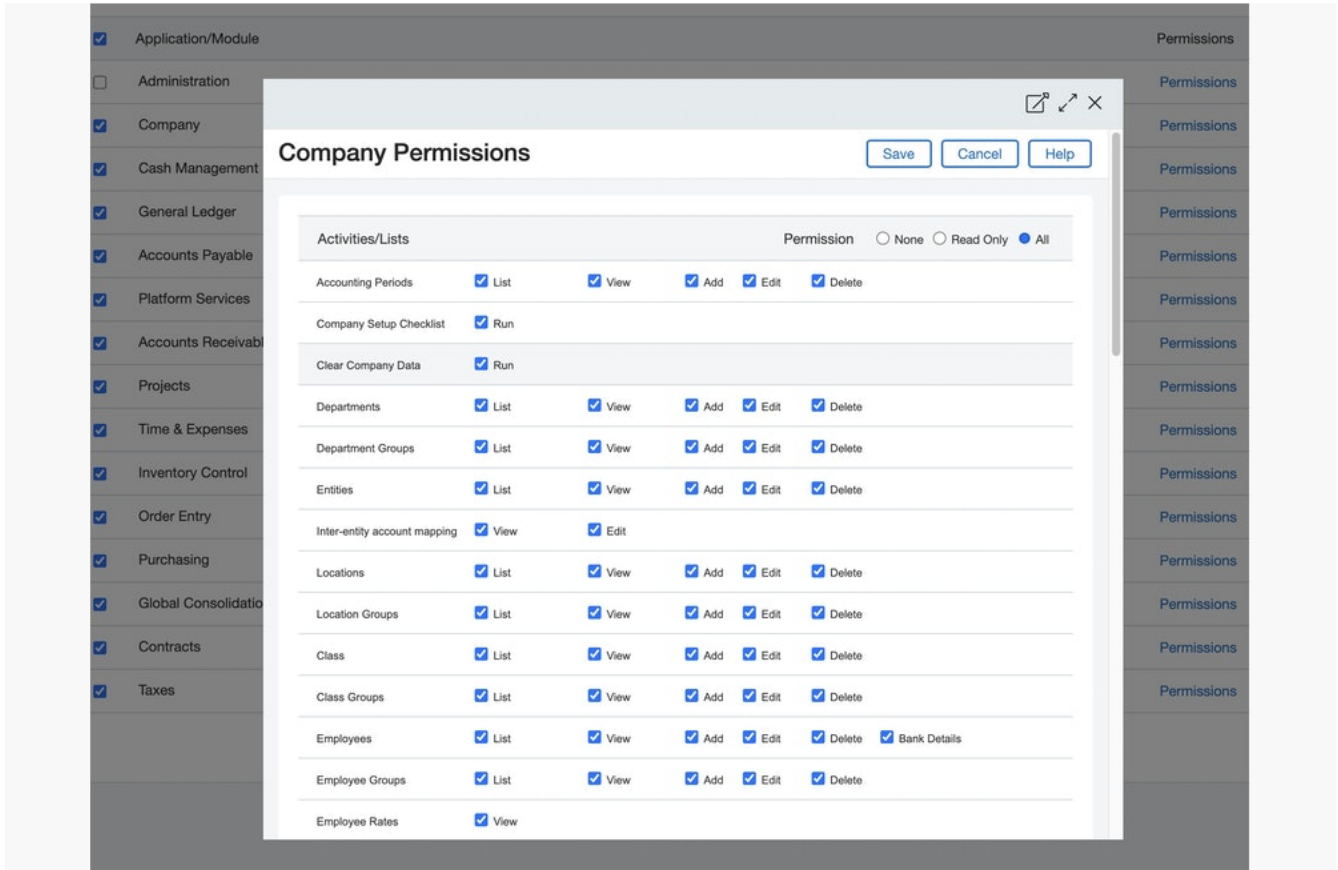
Create a special user in Sage Intacct called a Web Services user. This user cannot log in to your Sage Intacct account. Its purpose is to allow Shogo to access your data behind the scenes.

1. Go to **Applications -> Company -> Roles**
2. Click the **[Add]** button at the top right
3. Fill in the values as shown pictured and click **[Save]**

Next →

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Create Web Services Role



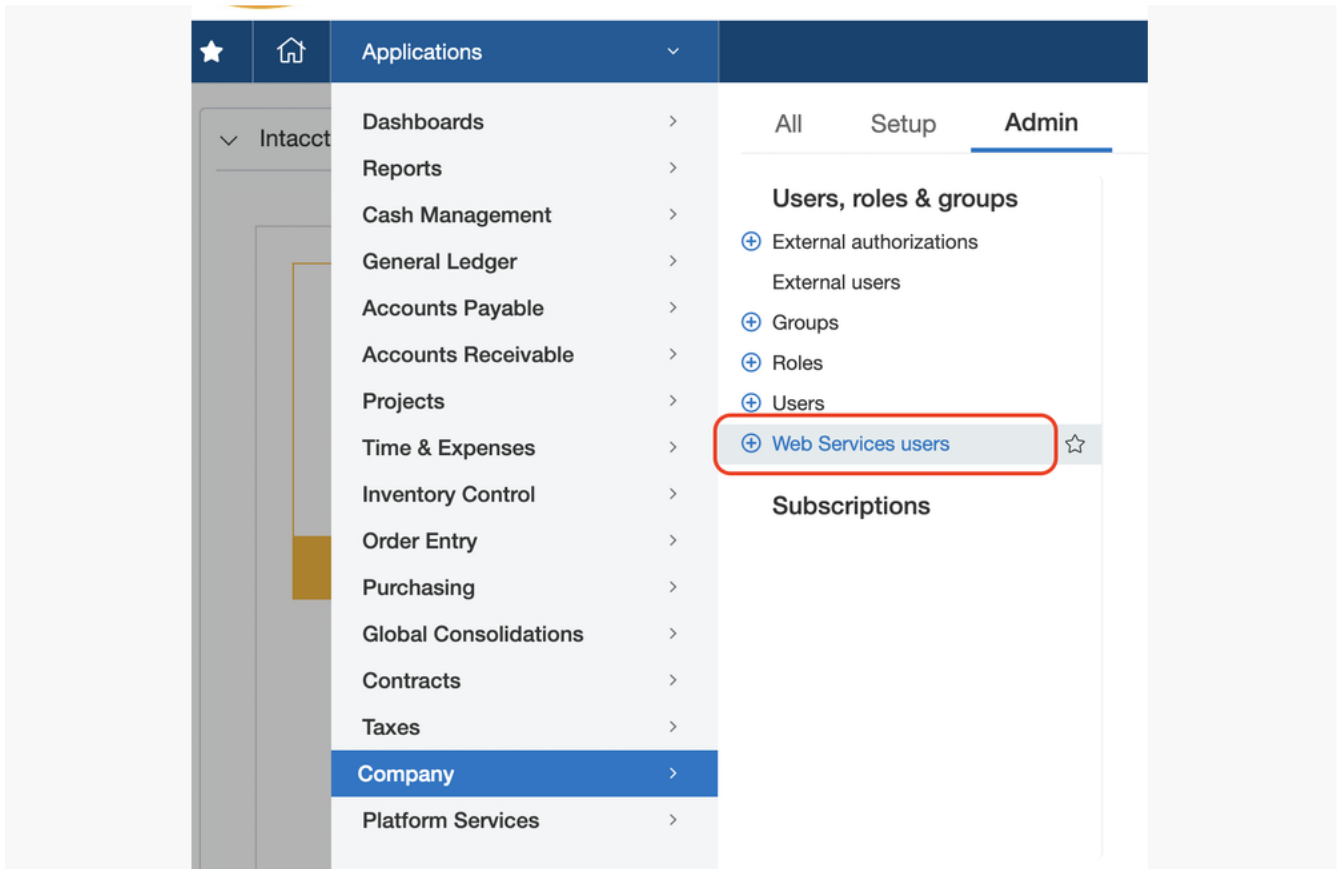
4. From the Roles list, click **[Edit]** next to the Shogo WS Role, and click **[View Subscriptions]**

5. Click on each of the Permission sets except for Administration and choose **[All]** and click **[Save]**

Next →

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Create the Web Services User



1. Go to
Applications

->

Company

->

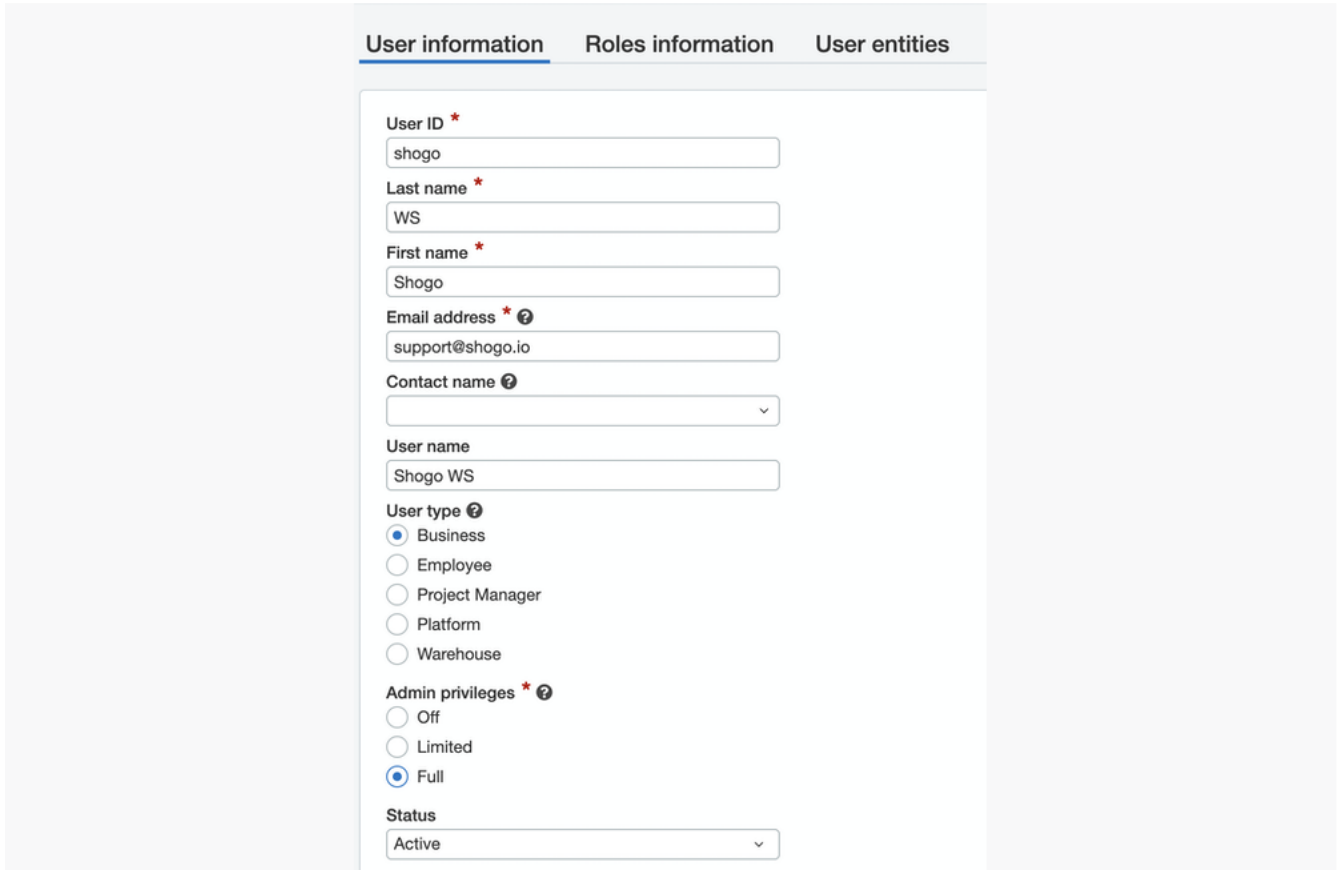
Web Services users

2. Click the **[Add]** button at the top right

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Create the Web Services User



The screenshot shows a user management interface with three tabs: "User information", "Roles information", and "User entities". The "User information" tab is active. The form contains the following fields and options:

- User ID ***: Text input field containing "shogo".
- Last name ***: Text input field containing "WS".
- First name ***: Text input field containing "Shogo".
- Email address * ?**: Text input field containing "support@shogo.io".
- Contact name ?**: Dropdown menu.
- User name**: Text input field containing "Shogo WS".
- User type ?**: Radio button group with options: Business (selected), Employee, Project Manager, Platform, Warehouse.
- Admin privileges * ?**: Radio button group with options: Off, Limited, Full (selected).
- Status**: Dropdown menu containing "Active".

3. Enter the values pictured under User Information and click **[Save]**

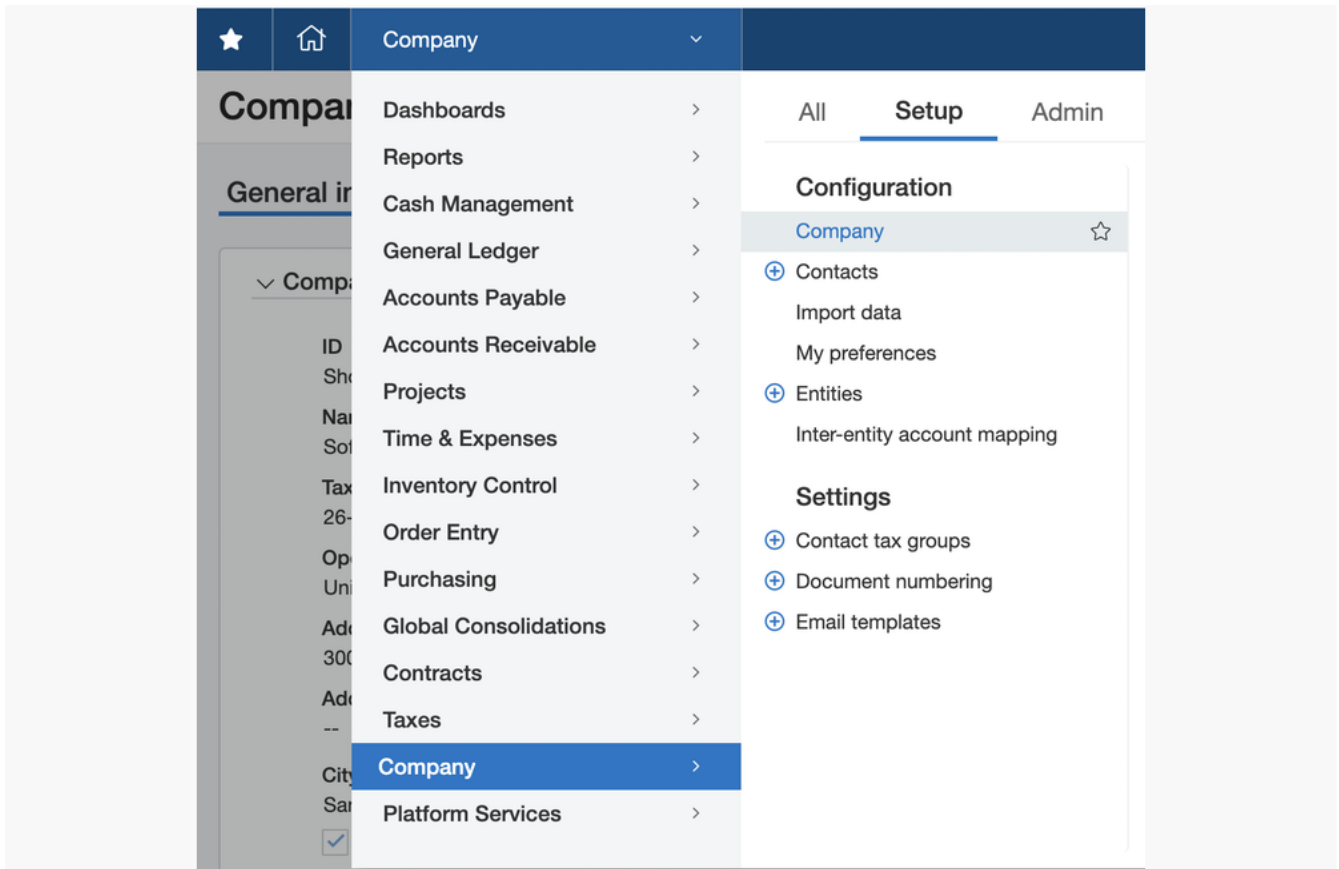
4. From the Web Services Users List, click **[Edit]** next to the shogo user.

5. Under the **[Roles information]** tab, select the **Shogo WS Role** you created earlier, and click **[Save]**

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Register the Shogo Sender ID with Sage Intacct



1. Navigate to **Applications -> Company -> Setup -> Company**
2. Click **[Edit]** and click on the **[Security]** tab.
3. Scroll down to **[Web Services authorizations]** and click **[Add]**

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Register the Shogo Sender ID with Sage Intacct

Web Services Sender Information

Sender ID *

ShogoMPP

Description

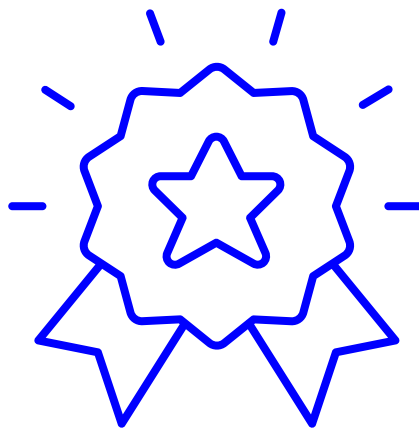
Shogo |

Status

Active



Enter the information provided and click **[Save]**



You have reached the end of this guide