

CONFIGURATION GUIDE FOR STRATUSVUE-INTACCT INTEGRATION

Prerequisites

1. Site Member Subscriber with Current License
2. Log into site with User from Organization that has the permission of Org Admin to access the Setup Integrations page (Refer to Last section below for setting up users)

Navigating to Integration

Please use the image as a guide to the information needed for Intacct integration

1. Navigate to your organization in the left panel
2. Your Organization → Setup → Integrations Setup

Intacct Connector

[The Intacct API allows this Organization's records to be synchronized with your Intacct database.](#)

Synchronize this Organization with Intacct

STRATUSVUE - TEST ENVIRONMENT USER NAME AND PASSWORD	
User Name:	admin
Password:	*****

INTACCT USER NAME AND PASSWORD	
User ID:	SV-API-Int
Password:	*****

INTACCT CONFIGURATION	
Company ID	StratusVueMPP-DEV-CRE
Sender ID	StratusVueMPP
Sender Password	*****

Connecting to Intacct

SCPC Credentials Needed

1. User Name and Password

Intacct Credentials Needed

1. User ID
2. Password

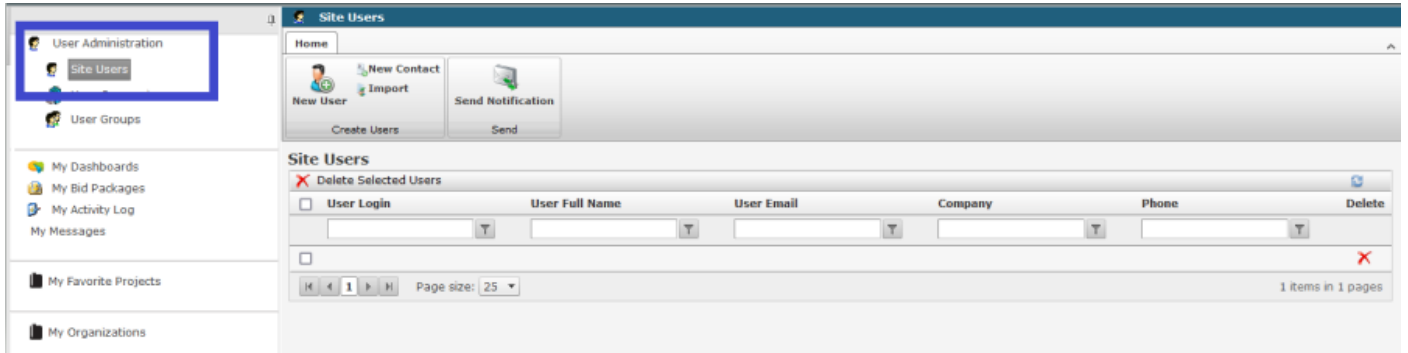
Intacct Configuration Information Needed

1. Company ID
2. Sender ID
3. Sender Password

1. After The credentials have been filled in, Click Save
2. You can now use the site

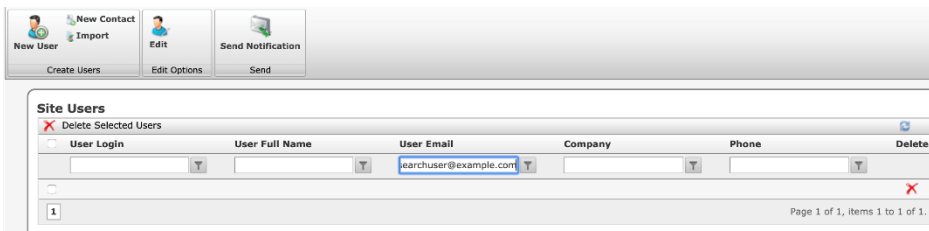
Setting Up a New User

User Administration > Site Users *Elevated Permissions needed to access this area*



Creating A New Site User

- To create a User first search the email address to make sure they are not already in the system as a contact:



If the user is not a contact or does not have a user profile, Click New User in at the top of the screen

- You will be taken to this screen where you will need to enter the following *REQUIRED* information:
 - Existing or New Company**
 - If the company is existing search for it using the Existing Organization search box. You must type at least three characters in the box in order for it to start displaying organization names. This could take a few seconds
 - Once you find the company the user belongs to, select it to populate the Address fields below
 - User Default Role**
 - User Login** - *It is best that the user login be the e-mail. Makes it easier to search for user to add to projects, etc.*
 - Password and Confirm Password**
 - First Name**
 - Last Name**
 - E-mail Address**

User Company

Existing Company New Company Include in Address Book?

Existing Organization * ▼

Location ▼ **Edit Qualification**

PLEASE NOTE THAT CHANGING THE ADDRESS FIELDS WILL ONLY CHANGE THAT INFORMATION FOR THIS USER AND NOT THE ENTIRE COMPANY.

This User Is Not From U.S.

Address Line 1

Address Line 2

City

State

Zip *

Phone * Ext.

Fax

Cell

Web Site

Add this user to selected user group

User Default Role

Select User Default Role * Planroom User Require More Information on Login

User Information

User Login *

ENTER PASSWORD *

RE-ENTER PASSWORD * Passwords must include a minimum of 8 characters, both upper- and lower-case letters, and a special symbol.

First Name *

Last Name *

Email Address *

Secondary Notification Email

Nickname

- Once that is complete, scroll down to the permissions. Select the appropriate permissions for the site user. External site users are recommended to only have the privilege to Manage their own user profile. Internal site users, depending on their role in the company, may be granted more advanced permissions.

USER SITE PERMISSIONS		
Permission Name	Permission Description	
<input type="checkbox"/> Create Projects	Enables User to Create projects	
<input type="checkbox"/> Manage Companies	Enables User to see "User Companies" and to Add/Modify organizations.	
<input checked="" type="checkbox"/> Manage User Profile	Enables User to manage or modify his/her user profile.	
<input type="checkbox"/> Manage Users	Enables User to add users to the site.	
<input type="checkbox"/> Organization Admin	Enables User to manage all organization Setting - Reserved for Your Org's Administrators	
<input type="checkbox"/> Send Faxes	Enables User to send project faxes.	
<input type="checkbox"/> View all projects	Enables User to "view only" all projects within their Organization even if they are not a project member.	

- Press Save to create your user's profile. You will get a message on your screen letting you know the user profile has been created, and the user will receive an email with their login credentials to begin using the site.

For More information

For more information on SCPS usage and integration please refer to:

<https://stratusvue.freshdesk.com/a/solutions>

Support@sagecpc.com

