

Sage Intacct <> Assignar Workflows & Configurations

Introduction

This document will describe the supported workflows for Assignar's Sage Intacct Integration. In this document you will learn about how data is synced, how fields are mapped for each workflow and the available configuration options for each workflow.

Data Syncing

Once set up the Assignar - Sage Intacct Integration will sync as described below. In addition to the automatic time based data syncs, users can manually initiate a sync between these intervals which will result in data being moved across the systems sooner.

- **Automatic Syncs** - Will Take Place 3 Times Per Day, Monday - Friday at approximately 6:00 AM, 12:00 PM and 6:00 PM Local Time. Local time is determined during the setup process.
- **Manual Syncs** - By pushing the Sync Now option, the Sync job will enter the queue, this job will start in 1 hour or less.
- **Timesheet Syncs** - Timesheet workflow runs on a less frequent schedule to support payroll, syncing once per day after 1:00 AM Local Time. This can be synced manually as needed and will follow the rules described above.

Intacct Employees → Assignar Fieldworkers

This workflow will take Employee records from Intacct and create a copy in the Assignar platform as a Fieldworker.

Configuration

By default only "Active Employees" from Sage will sync to Assignar. Assignar only sync's Field employees from Sage, not office users. You can choose to filter based on the following conditions.

- **Department** - Select which employees to sync to Assignar based on assigned Department.
- **Earning Type** - Select which employees to sync to Assignar based on Earning Type

Field Mapping

Intacct (Employees)	Assignar (Fieldworkers)
Employee ID	External ID
Status	IsActive/Active
Position	Role
DOB	Birthdate
Contact Mailing Information	Address
Employee Contact - Primary Phone	Contact Phone
GUID	Integration_ID
--	User Type (Fieldworker)
--	Employment Type (Full Time)

Employee Contact - First Name	First Name
Employee Contact - Last Name	Last Name
Employee Contact - Primary Email Address	Email, Username

Intacct Customers → Assignar Clients

This workflow will take Customer records from Intacct and create a copy in the Assignar platform as a Customer.

Configuration

By default only "Active Clients" from Sage will sync to Assignar. You can choose to filter based on the following conditions.

- **All Active Client** - Will sync any sage client marked as Active to Assignar.
- **Active Clients with Active Projects** - Will sync Active Clients when Syncing Projects Only. *Must have project sync workflow enabled.
- **Customer Type** - Will sync customers based on Customer Type field from Sage Intacct.

Field Mapping

Intacct (Customer)	Assignar (Client)
Customer ID	External ID
Status	Client Active
Customer Name	Client Name
Address 1	Address
City	City
State	State
Postal Code	Zipcode
Primary Contact Email	Email
Primary Phone	Mobile

GUID	Integration_ID
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Intacct Job Project → Assignar Project

This workflow will take Job/Project records from Intacct and create a copy in the Assignar platform as a Project.

Configuration

By default only "Active Jobs/Projects" from Sage will sync to Assignar. You can choose to filter based on the following conditions.

- **Type** - Choose to Sync Projects based on Job Type from Sage Intacct
- **Status** - Choose to Sync Projects based on Job/Project Status from Sage Intacct

Field Mapping

Intacct (Job/Project)	Assignar (Project)
Customer	Client Name
Job Name	Project Name
Begin Date	Start Date
Job Manager	Supervisors
Job ID	External ID
Cost Codes	Activities
ID/GUID	Integration ID

Intacct Job/Project → Assignar Work Order

This workflow will take Job/Project records from Intacct and create a copy in the Assignar platform as a Work Order, when the Job/Project has a Parent Job (is a 2nd level down, this will become an order).

Configuration

By default only "Active Jobs/Projects" from Sage will sync to Assignar. You can choose to filter based on the following conditions.

- **Type** - Choose to Sync Work Orders based on Job Type from Sage Intacct.
- **Status** - Choose to Sync Work Orders based on Job/Project Status from Sage Intacct.

Field Mapping

Intacct (Job/Project)	Assignar (Work Orders)
--	Work Order Type - Full
Parent Job	Project
Customer	Client
Begin Date	Start
End Date	End
Job Manager And/Or Assignar Super	Owner
ID/GUID	Integration ID
--	Status (New)
Description	Description

Intacct Labor Items → Assignar Roles

This workflow will take Labor Item records from Intacct and create a copy in the Assignar platform as an Roles.

Configuration

By default only "Active Labor Items" from Sage will sync to Assignar. There are no available filter options for the Labor Items workflow at this time.

Field Mapping

Intacct (Item, Type Labor)	Assignar (Roles)
Name	Name
ID	Code, Ext ID
GUID	Integration ID

Intacct Equipment Items → Assignar Equipment

Intacct (Items)	Assignar (Equipment)
Type (Equipment)	--
Name	Name
Extended Description	Description
Specification 1	License Plate

Specification 2	Year, Make Model
Specification 3	Serial #
Item ID	Ext ID

Intacct Cost Codes → Assignar Activities

This workflow will take Cost Code records from Intacct and create a copy in the Assignar platform as an Activity.

Configuration

By default only "Active Cost Codes" from Sage Intacct Standard Cost Code Catalog will sync to Assignar. You can choose to filter based on the following conditions.

- **Billable Cost Codes** - Choose to Sync Cost Codes marked as Billable in Sage Intacct.
- **Utilized Cost Codes** - Choose to Sync Cost Codes marked as Utilized in Sage Intacct.

Field Mapping

Intacct (Cost Codes)	Assignar (Activities)
ID + Name + Parent Name (up to 100 char)	Activity Name
Cost Code ID	External ID
GUID	Integration ID

Assignar Timesheets → Intacct Timesheet Entries

This workflow will take Timesheet records from Assignar and push to Sage Intacct as Timesheet Entries

Configuration

By default only "Approved Timesheets" from Assignar will sync to Sage Intacct. The following configurations are required to set up this workflow. Timesheets sync ONCE per day after 1:00 AM Local Time.

- **Timesheet Week Begins** - Choose to the day of the week that represents the start for your weekly payroll process.
- **Employee Default Role** - Choose an Employee Default Role to support a fallback option for incorrectly coded timesheet entries. *Prevents sync failures because this field is required.
- **Entry Grouping** - Choose how you would like your timesheet entries to be grouped based on the setup of your Sage Intacct environment. Visit, Jobs -> Configuration >

Timesheet Settings and choose the matching "Track Time By" setting. *This must match your setting or time will not post.

Field Mapping

Assignar (Timesheet)	Intacct (Timesheet Entries)
Client	Customer ID
Work Order	Job/Project ID
Activity	Cost Code
(Obey Preference)	Billable
Role	Employee Position ID
Location ID	Location ID*
Date	Entry Date
Total Time	Quantity