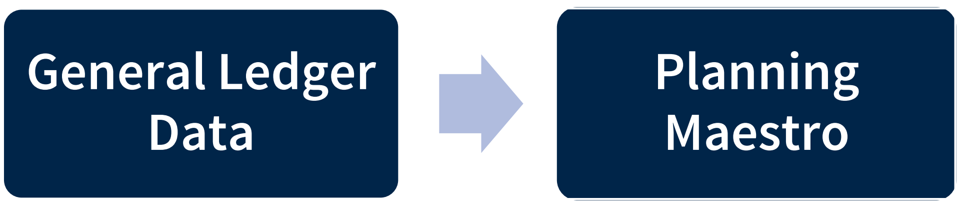
CENTAGE DATA INTEGRATION WITH SAGE INTACCT

Planning Maestro enables you to upload current data from your accounting or ERP system to analyze or use in your budget. After you set up an integration between Planning Maestro and your accounting system, Planning Maestro can extract data every night to use for the next day.



Planning Maestro can integrate with many accounting systems, including **Sage Intacct**.

This Implementation guide shows you, a Planning Maestro **Administrator**, how to authorize Centage to access your **General Ledger** data in **Intacct**.

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Integration Overview

Centage's integration can pull in core **General Ledger** structures and information from **Intacct**. It extracts data every night to ensure fresh data is populated into Planning Maestro for the following day.

You can also include also Transaction Details and Budgeting data (optional).

***Please Note**: Including optional data may impact the integration's performance, depending on data volume, and is excluded unless you request otherwise.*

We extract the following information:

- **General Ledger Dimensions (Standard)**
- **Class**
- **Customer**
- **Department**
- **Entity**
- **Item**
- **Location**
- **Project**
- **Vendor**

General Ledger Transaction Details (Optional)

Fields that would be available in Excel Drill-through in addition to the Dimensions above

- **Batch_title**
- **Document**
- **Recordtype**
- **Entrydescription**
- **Prdescription**

***Please Note**: You can relabel the fields above. These are standard **Dimensions** in Intacct. If the **Dimension** you use is not in the list above, it could be a relabeled standard dimension or it is a custom **User Defined Dimension**. Please let us know if you do not see something you expect.*

Prerequisites for Access

Subscribe to Web Services

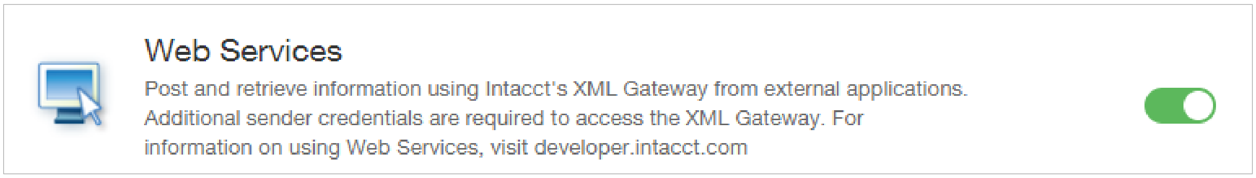
Add your company's Sender ID to Sage Intacct's allowed list.

Step 1: Company → Subscriptions.

Step 2: Find **Web Services** and click on it to **Subscribe**.

Step 3: Ignore the warning about additional charges.

Please Note: *Since Centage is an approved marketplace partner with* ***Intacct,*** *there will be no extra charge.*



Add Sender ID

Add Centage's Sender ID to the allowed list.

Step 1: Company → Company Info.

Step 2: Click **Edit**.

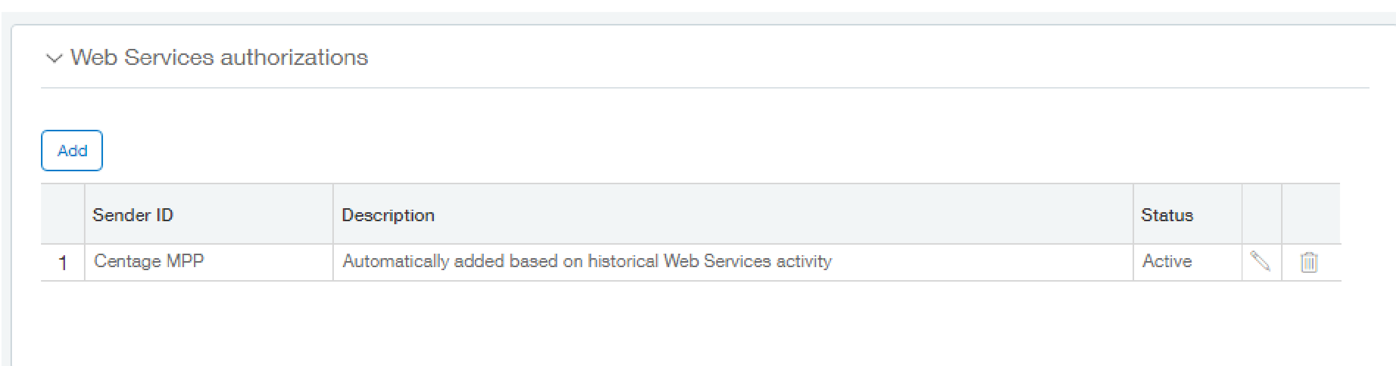
Step 3: Click on the **Security** tab.

Step 4: Go to the section labeled **Web Services authorizations**.

Step 5: Click **Add** to add the **Sender ID, Centage MPP,** and set it to active.

Step 6: Save the **Web Services Sender Information**.

Step 7: Save **Company Info**.

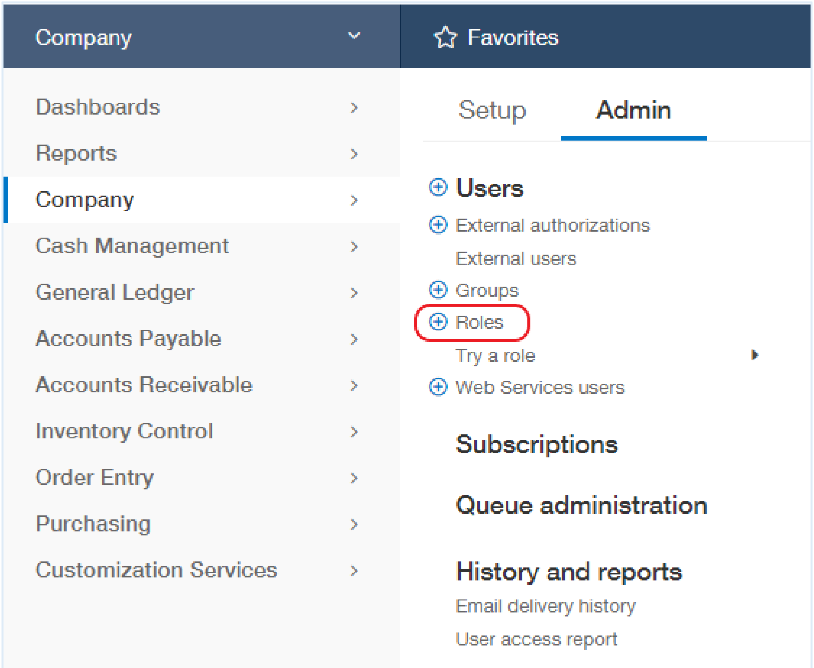


Create User with Role-Based Security

Create a Role

*Create a new user role for the **Centage Integration** team to use.*

Step 1: Navigate to **Company → Admin → Roles.**



Step 2: Click **Add**. Enter the following values for these fields:

Name	Centage
Description	Centage Integration

Step 3: Click **Save.**

Step 4: Provide **Read Only Permissions** for each of the following applications / modules:

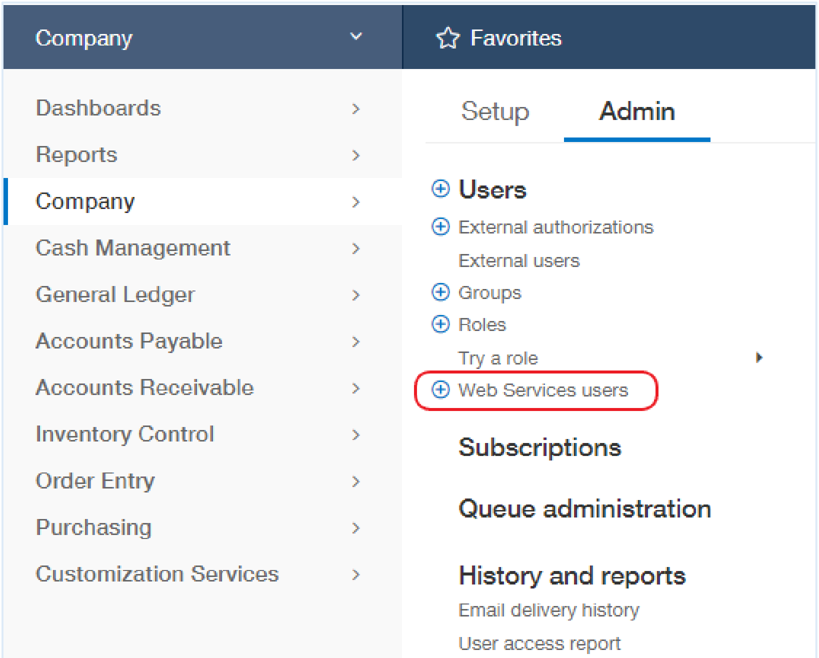
- **Company**
- **General Ledger**
- **Order Entry**
- **Accounts Payable**
- **Accounts Receivable**
- **Cash Management**

Step 5: Click **Save**.

Create Web Service User

Create a new user account that will enable the **Centage Integration** team to set up the integration between your **Sage Intacct** account and your Planning Maestro account.

Step 1: Company → Admin → Web Service users.



Step 2: Click **Add**.

Step 3: Enter the following values for these fields to create a special **Centage Integration** user:

User ID	Centage
Last name	Integration
First name	Centage
Email address	Integration@Centage.com
Contact name	Centage Integration
User name	Centage
User type	Business
Admin privileges	Off

Status	Active

Step 4: Click on the **Roles information** tab and select the **User Role you** created in the previous step.

Step 5: Click **Save**. Ignore any warning that there will be a charge for creating the **User**.

Please Note*: Since Centage is an approved marketplace partner with* ***Intacct****, there will be no extra charge for this user.*

What's Next?

Centage's **Integration Team** will receive an email automatically from **Intacct** once the user is created. We will confirm permissions have been configured properly and will notify you if any modifications are necessary. No further action will be required at this time unless otherwise requested. Once the integration has been completed, **Centage Consulting** will validate the data and will reach out if necessary.

If you have any questions or need assistance, please contact **Centage Integration** by email at Integration@Centage.com or by phone at 508.948.0048.