

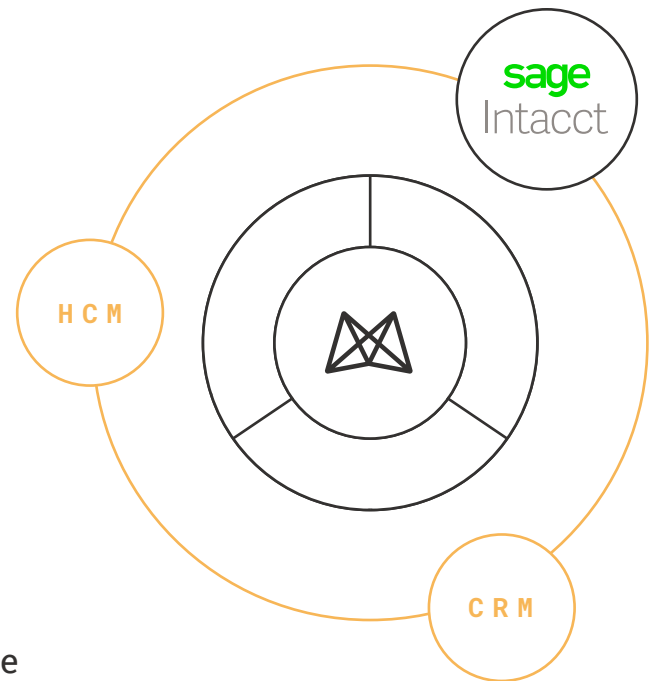
# Intacct Integration

Mavenlink's Intacct integration makes it possible for organizations to automatically sync project information between the two applications.

Manage projects in Mavenlink and perform accounting functions in Intacct without having to import/export or manually enter data twice.

## BENEFITS

- Improve accuracy of revenue forecasts
- Learn which projects can accelerate revenue
- Save time on manual data entry
- Improve communication between project delivery teams, accounting, and clients
- Supply accounting with visibility into when projects are created
- Allow delivery teams to see when invoices are paid



## sage Intacct

### AVAILABILITY & ACCESS

The Intacct integration is available to Mavenlink Premier and Enterprise accounts and requires the Intacct Web Services and Project module.

Once the integration has been activated by a Solutions Engineer, the integration will be administrator-configurable using the Mavenlink Integrations web-based user interface.

# GET A COMPLETE VIEW OF YOUR PIPELINE AND PROJECTS

## Functional Capabilities

- Projects are pushed from Mavenlink to Intacct
- New projects and updates to projects are pushed to Intacct
- Intacct project updates are not pushed back to Mavenlink
- Tasks in Mavenlink are pushed to Intacct when a project is created as well as updates to the project
- Mavenlink project participants are pushed to Intacct as Project Resources
- Approved timesheets in Mavenlink are pushed to Intacct
- Rejection of previously approved time in Mavenlink removes the timesheet in Intacct
- Approved expenses in Intacct are pushed to Mavenlink
- Updates to expenses are not pushed to Mavenlink
- Sales documents created in Intacct containing time or expense entries are pushed to Mavenlink

### CONFIGURATION OPTIONS

- Filter by Mavenlink project status
- Filter by Mavenlink custom fields
- Override Intacct location for projects
- Override Intacct location for timesheets
- Billing indicator type: Mavenlink project or task indicate whether it is fixed fee or time and materials
- Map Intacct Item ID to specific Mavenlink custom field
- Associate time tracked in Mavenlink with a task to the role/item in Intacct
- Schedule data sync between Mavenlink and Intacct

# Field Mappings

## Projects

Mavenlink Field	Direction	Intacct Field
Title	▶	Name
Description	▶	Description
Start Date	▶	Begin Date
Due Date	▶	End Date
Budget	▶	Budget Amount
Organizations (Department)	▶	Department
Organizations (Geography)	▶	Location
Team Lead	▶	Project Manager
Status	▶	Project Status
Currency	▶	Currency
Perfect Complete	▶	Percent Complete
Fixed Fee / T&M	▶	Billing Type
<b>Intacct Custom Fields (Required)</b>		
ID	▶	Mavenlink ID
<b>Mavenlink Custom Fields (Required)</b>		
GL Project ID	◀	ID
GL Project Creation Date	◀	Date Created
<b>Intacct Custom Fields (Optional)</b>		
GL Customer ID	▶	Customer ID
Project Type	▶	Project Type
Purchase Order Number	▶	PO Number
SFDC Opportunity ID	▶	Document Number

# Field Mappings

## Project Resources

Mavenlink Field	Direction	Intacct Field
User ID	▶	Employee ID
Role (must contain item ID)	▶	Item ID
Rate (from Rate Card)	▶	Billing Rate
Workspace ID	▶	Project ID

## Tasks

Mavenlink Field	Direction	Intacct Field
Title	▶	Name
Start Date	▶	Planned Begin Date
Due Date	▶	Planned End Date
Task Type	▶	Is Milestone?
Status	▶	Task Status
Percentage Complete	▶	Perfect Complete
Time Estimate	▶	Estimated Quantity
Billable	▶	Billable
Item Scenario Field	▶	Item ID
Workspace ID	▶	Project ID
<b>Intacct Custom Fields (Required)</b>		
ID	▶	Mavenlink ID
<b>Mavenlink Custom Fields (Required)</b>		
GL Task ID	◀	ID

# Field Mappings

## Timesheets

Mavenlink Field	Direction	Intacct Field
User ID	▶	Employee ID
Start Date	▶	Begin Date
Comment	▶	Description
Scenario Option	▶	Project ID
Dropdown Status	▶	State
<b>Intacct Custom Fields (Required)</b>		
ID	▶	Mavenlink ID

## Time Entries

Mavenlink Field	Direction	Intacct Field
GL Customer ID (on Project)	▶	Customer ID
Role (on User)	▶	Item ID
Date Performed	▶	Entry Date
Time in Minutes	▶	Quantity
Notes	▶	Notes
Billable?	▶	Billable?
Organizations – Geography (on Project)	▶	Location ID
Organizations Department (on Project)	▶	Department ID
Rate in Cents	▶	External Bill Rate
Workspace ID	▶	Project ID
Task ID	▶	Taskkey
<b>Intacct Custom Fields (Required)</b>		
ID	▶	Mavenlink ID

# Field Mappings

## Expenses

Mavenlink Field	Direction	Intacct Field
Category	←	Account Label
Amount	←	Transaction Amount
Date	←	Entry Date
Notes	←	Comments
Billable?	←	Billable?
Workspace ID	←	Project ID
User ID	←	User ID

## Invoices

Mavenlink Field	Direction	Intacct Field
Invoice Date	←	Date Created
Payment Schedule	←	Payment Schedule
User Invoice Title	←	Record Number
User Invoice Number	←	Document Number
Workspace ID	←	Project ID
Time Entry IDs	←	Time Entries
Fixed Fee Items	←	Fixed Fee Attributes

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