

ALIS Intacct API How-To Guide



1. Login to your Intacct instance and navigate to Company > Admin > Web Services Users

The screenshot shows the Intacct Admin interface. The left sidebar has a 'Company' dropdown menu. The 'Company' menu is open, showing a list of options including 'Dashboards', 'Reports', 'Company', 'General Ledger', 'Order Entry', 'Accounts Payable', 'Accounts Receivable', 'Inventory Control', 'Time & Expenses', 'Cash Management', 'Purchasing', 'Platform Services', and 'User Defined Dimension'. The 'Company' option is highlighted. The main content area shows the 'Admin' tab selected, with a sub-menu for 'Users, roles & groups'. The 'Users' option is highlighted. A red arrow points to the 'Web Services users' link in the sub-menu. A red box with text is overlaid on the image, pointing to the 'Web Services users' link.

Create new Web Services user for ALIS to access your Intacct instance

2. Create a new Webservices User with the information listed below

The screenshot shows the 'Web Services User Information' form in the Intacct Admin interface. The form has several tabs: 'User information', 'Roles information', 'User entities', 'User departments', and 'User territories'. The 'User information' tab is selected. The form contains the following fields:

- User ID: xml_gateway_ALIS
- Last name: API
- First name: ALIS
- Email address: john.shafae+intacctapi@medtelligent.com
- Contact name: (dropdown menu)
- User name: xml_gateway_ALIS
- User type: Business (selected)
- Admin privileges: Off (selected)
- Status: Active (dropdown menu)

Red arrows point from a red box to the 'User ID', 'User name', 'User type', and 'Admin privileges' fields. The red box contains the following text:

Username/User ID:
xml_gateway_ALIS

Business User
Admin Off

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3. Create a new custom Role for ALIS to use when accessing your instance

Company Type: Developer

Web Services DEMO Top level

Guest Welcome Help & Support

Web Services User Information

Save Duplicate Cancel More actions

Done! You reset the password. A confirmation email was sent to the user.

User information Roles information User entities User departments User territories

Role Name

1	ALIS XML Role	+	-
2		+	-
3		+	-
4		+	-
5		+	-

Create new role:
Name: **ALIS XML Role**
Desc: **Limited access for ALIS Intacct API**

Then press "Save"

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4. Define the new role's permissions to your Intacct instance

Company Type: Developer

Web Services DEMO Top level

Guest Welcome Help & Support

Web Services Users

Add Done Export

All Manage views Include inactive Advanced filters Clear all filters

User ID	User name	User type	Admin privileges	Entity	Permissions Report
medtelligent	Metcalf William	Business User	Full		View Permissions & Roles Groups Preferences Delete
xml_gateway_ALIS	xml_gateway_ALIS	Business User	false		View Permissions & Roles Groups Preferences Delete

Select to configure the new ALIS XML Role

javascript:launch('userperm_aggregate.phtml?op=12318&report=18&mode=userperm&type=_html&userid=xml_gateway_ALIS&u_o_gkey=35&userkey=35';Assignment;790,600);

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5. Navigate to the Roles tab and select “view” to configure the role

Company Type: Developer

Web Services DEMO (Top level)

Guest Welcome Help & Support

Web Services Users

Permissions & Roles Report

User information

User ID: xml_gateway_ALIS
Username: xml_gateway_ALIS

Permissions Report

Role Name: ALIS XML Role
Description: Limited access for ALIS Intacct API

Subscriptions

View

Select "Roles" and then "view" to setup the new role.

6. Select “permissions” for General Ledger and Accounts Payable, then enable the selected permissions. ALIS uses Account Payable permission to verify API access.

Company Type: Developer

Web Services DEMO (Top level)

Guest Welcome Help & Support

Web Services Users

ALIS XML Role - Roles Subscriptions

Application/Module

Administration

Company

General Ledger

Order Entry

Accounts Payable

Accounts Receivable

Inventory Control

Permissions

Permissions

Permissions

Permissions

Permissions

Permissions

Permissions

Select "permissions" and enable the prescribed permissions

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For “General Ledger” set...

Company Type: Developer

Web Services DEMO (Top level)

Guest Welcome Help & Support

Company

Web Services Users

All Manage views Include inactive Advanced filters Clear all filters

User ID

medelligent

xmi_gateway_ALIS

General Ledger Permissions

Save Cancel Help

Activities/Lists	Permission	None	Read Only	All
Journal Entries	List View Add Edit Delete Reverse	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Statistical Journal Entries	List View Add Edit Delete Reverse	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Adjusting Journal Entries	List View Add Edit Delete	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Statistical Adjusting Journal Entries	List View Add Edit Delete	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
User-Defined Journal Entries	List View Add Edit Delete	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GAAP Adjusting Entries	List View Add Edit Delete	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tax Adjusting Entries	List View Add Edit Delete	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Approve Journal Entries	List	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Groups Preferences Delete

Groups Preferences Delete

(1 - 2 of 2)

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For “Accounts Payable” set...

Company Type: Developer

Web Services DEMO (Top level)

Guest Welcome Help & Support

Company

Web Services Users

All Manage views Include inactive Advanced filters Clear all filters

User ID

medelligent

xmi_gateway_ALIS

Accounts Payable Permissions

Save Cancel Help

Add To Check Run	Run	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Adjust Account	Run	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Check Reconciliation	Run	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pay in Advance	Run	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vendors	List View Add Edit Delete Bank Details	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vendor Types	List View Add Edit Delete	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vendor Groups	List View Add Edit Delete	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bills	List View Add Edit Post Delete Override AP account Reverse Reclassify	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Adjustments	List View Add Edit Post Delete Override AP account Reverse Reclassify	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recurring Bills	List View Add Edit Delete	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Groups Preferences Delete

Groups Preferences Delete

(1 - 2 of 2)

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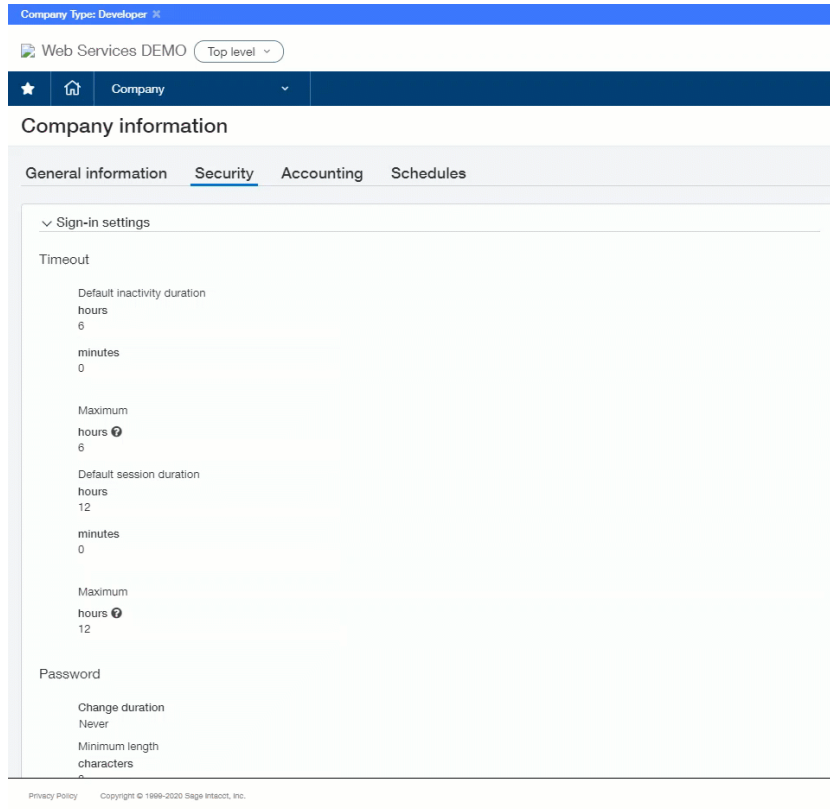
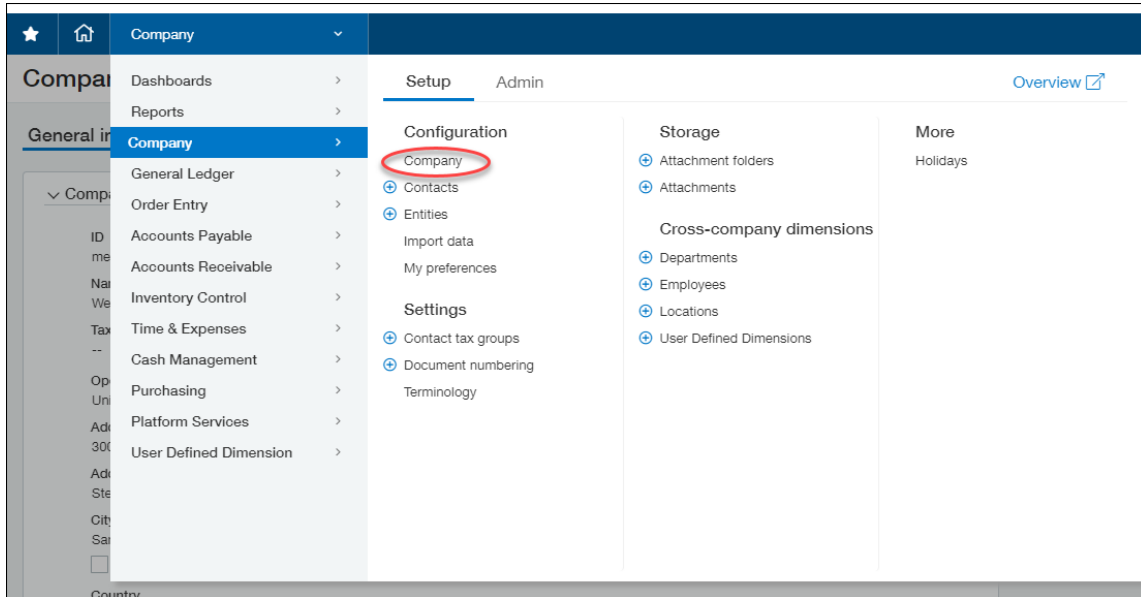
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7. Set the Sender ID so that Intacct recognizes ALIS.

Visit Company > select the Setup tab > Company > select the Security tab and scroll down to Web Services authorizations. Set the following details, and save:

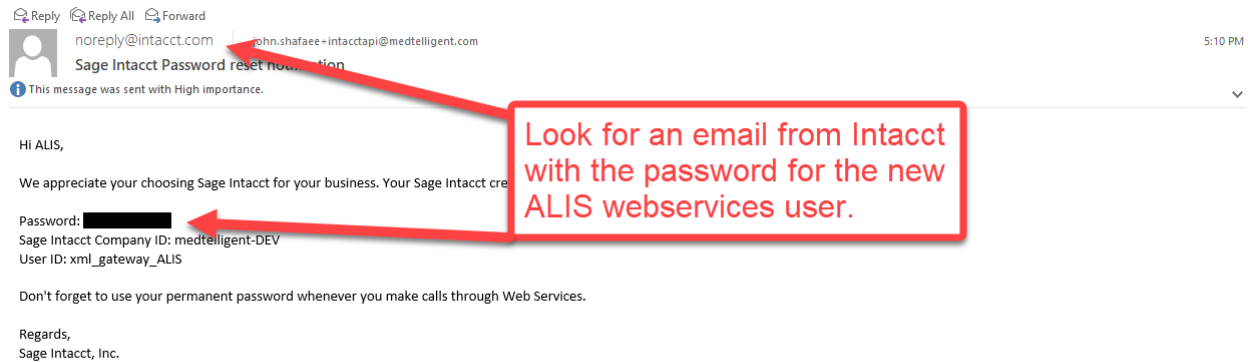
- Sender ID: medtelligent
- Description: ALIS to Intacct API
- Status: Active



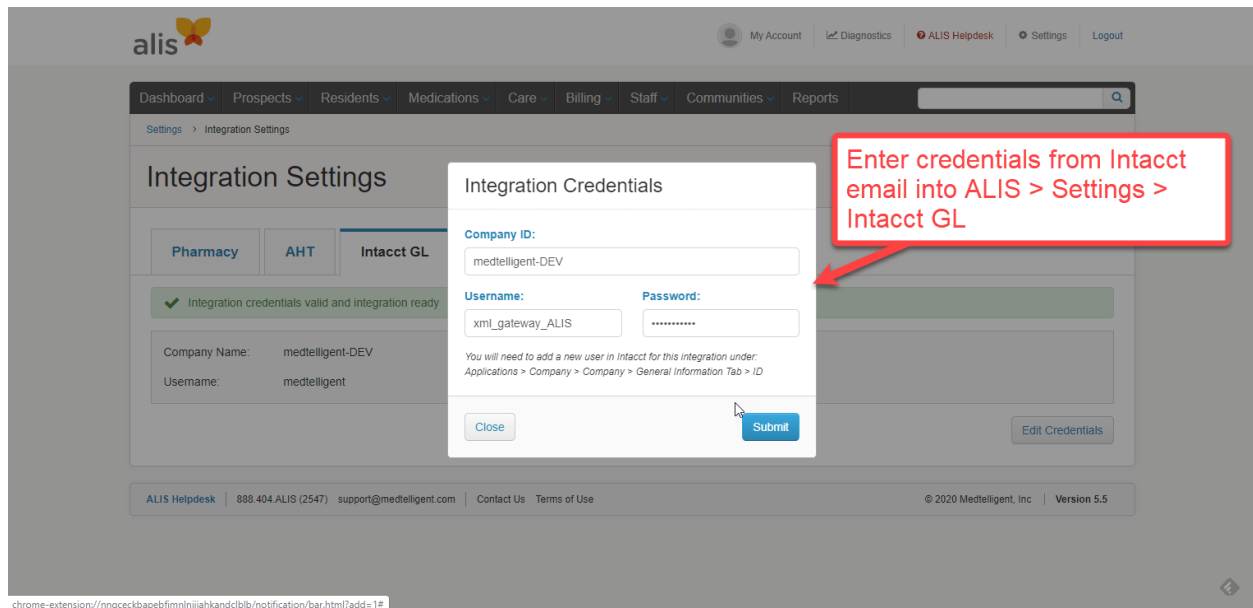
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8. Look for an email from Intacct with the password and other details for the new **xml_gateway_ALIS** user.



9. Enter credentials from the email into the ALIS Intacct settings. You will see a green banner when credentials are verified.



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10. Lookup Location and Department IDs in Intacct to enter them into ALIS

The screenshot shows the Sage Intacct Setup menu. The 'Company' dropdown is open, showing 'Company' selected. The 'Setup' tab is active, and the 'Configuration' section is expanded. Under 'Configuration', 'Departments' and 'Locations' are highlighted with red boxes. A red callout box with an arrow points to these items, containing the text: "Lookup Location ID and Dept ID, enter in ALIS settings".

11. Enable Intacct integration and set the Location and Department IDs in ALIS

The screenshot shows the ALIS Billing Settings page. The 'GL Integration Settings' section is highlighted with a red box. It shows 'You are currently integrated with IntAcct.' and 'GL Transactions Integration: Started on 03/01/2019. Integration Enabled'. Below this, 'Star Accounts Transactions Integration: Started on 03/01/2019. Integration Disabled' and 'API Integration: Integration Enabled' are also highlighted with red boxes. A red callout box with an arrow points to the 'GL Integration Settings' section, containing the text: "Enable Intacct API. Only available after entering valid API credentials." The 'IntAcct Export File Settings' section is also highlighted with a red box, showing 'Journal: ALIS', 'Location ID: TCL', and 'Default Department ID: MED'. A 'Save Changes' button is visible at the bottom right.

You are all set! Try a test transaction in ALIS from Billing > GL Transactions Page!