



Overview & Objective – The purpose of this O M & U is to provide guidance on Intacct User Setup. These procedures must be completed prior to User's being available in OpenAir for bookings or time entry.

Note: As presented, these procedures do not necessarily fit the business rules/requirements of every company using OpenAir. In addition, certain terminology presented provides only a sampling of possible names that could be applied.

Initial Navigation – To navigate to the Intacct User Setup Screen (from the Accounting Console):

1. Go to the Applications dropdown (upper right hand corner)
2. Select the Company Module
3. Go to the Records dropdown (middle of the menu bar)

CREATING AN INTACCT USER – Creating an Intacct User begins with entering **Contact** and **Employee** information. After these profiles are complete an Intacct **User** must be created; the user is associated with the profiles and then module access and permissions are assigned.

ADDING CONTACTS – This procedure outlines how to complete the setup of an Intacct Contact:

- I. Select the Record "Contacts"
- II. Click the "Add" link in the upper right hand corner of the screen
- III. The form "Contact Information" should appear (the first tab is **<Contact Info>**) ...from here the following information is required:
 - **Last Name** – This will correspond to the OpenAir user's last name
 - **First Name** – This will correspond to the OpenAir user's first name
 - **Salutation** – This will correspond to the OpenAir user's salutation
 - **Company Name** – The Company Name should be kept consistent with the name of the firm
 - **Suggested Contact Name** – Generally, this should be Last Name, First Name (use comma). **Note: Input of the contact name is important! Once input it cannot be changed.**
 - **Print As** – Generally, this should be Last Name, First Name (use comma)
 - **Taxable** – This check-box should be unmarked
 - **Tax Group** – This should be left blank
 - **Status** – Should be set to "Active" unless the contact is no longer active

...When the **<Contact Info>** form is complete click the **<Additional Data>** tab...and enter:

- **Primary Phone Number** – This will correspond to the OpenAir user's phone number
- **Primary E-Mail Address** – Enter the user's e-mail. **Note: Entering an E-Mail address is Important!**

...When the **<Additional Data>** form is complete click the **<Mailing Info>** tab...and enter:

- **Address Line 1, Etc.** – This will correspond to the OpenAir user's home address

...When the **<Mailing Info>** tab is complete click "Save"

⇒ This completes the setup of the Intacct Contact.

ADDING EMPLOYEES – This procedure outlines how to complete the setup of an Intacct Employee:

- I. Select the Record, "Employees"
- II. Click the "Add" link in the upper right hand corner of the screen
- III. The form "Employee Information" should appear (the first tab is **<Employee Information>**) ...from here the following information is required (some fields have been left out of consideration):
 - **Employee ID** – Generally, this should be the User's LAST NAME (all caps). **Note: Input of the Employee ID is important! Once input it cannot be changed.**

ADDING EMPLOYEES (Setup Continued)

- **Primary Contact Name** – The **Contact** that was established (see above) should be linked to the **Employee** that's being created here. **Selecting the same Contact is important!**
- **Start Date** – Generally, the first date the employee begins employment with the firm
- **Vertical (or Department) ID** – Select the employee's Department or Vertical association
- **Location** – Select the employee's Location association

...When the **<Employee Information>** form is complete click the **<Contacts>** tab...and verify:

- **Category** – Should remain as "Primary Contact"
- **Contact** – This should be consistent with user from the **Primary Contact Name** drop-down

...When the **<Contacts>** tab has been verified click "Save"

⇒ This completes the setup of the Intacct Employee.

ADDING USERS – This procedure outlines how to complete the setup of an Intacct User:

- I. Select the Record, "Users"
- II. Click the "Add" link in the upper right hand corner of the screen
- III. The form "User Information" should appear ...from here the following information is required:
 - **User ID** – Generally, this should be User's First Initial followed by Last Name (proper case no spaces). **Note: Input of the User ID is important! Once input it cannot be changed.**
 - **Password & Confirm** – An initial password must be set. This can be changed at a later date.
 - **Contact** – The **Contact** that was established (see above on creating Contact) should be linked to the **User** that's being created here. **Selecting the same Contact is important!**
 - **User Name** – Enter Last Name, First Name (use comma and enter in proper case)
 - **User Type** – Select one of the radio buttons:
 - **Business User** – Select if the user will have extended (**administrative**) access. Note: By selecting Business User Intacct seat charges **will be charged.**
 - **Limited User** – Select if the user will have limited OpenAir access only
 - **Admin Privileges** – Select "Limited." Note this is only available if the User is a Business User.
 - **Administrative Password** – A bonafided Admin. password must be entered to create the User
 - **Status** – If you no longer want the User active (accessing Intacct/OpenAir) select "Inactive."
 - **Password Never Expires** – This check box should be marked IF password expiration is handled at a User level. Otherwise, expiration policies will be overridden by global settings.
 - **Password Quality Not Enforced** – This check box should be marked IF password quality is handled at a User level. Otherwise, quality policies will be overridden by global settings.
 - **Application Login Disabled** – This check-box should be marked if the User is denied access

...When the **User Information form** has been verified click "Save." This will evoke a User Subscription screen; details on completing this form are contained in "Intacct Subscription Setup."

⇒ This completes the setup of the Intacct User.

Further Instruction & Use – For further information regarding Intacct User Setup contact your Account Executive or call The NDH Group, Ltd. at 312.461.0505.