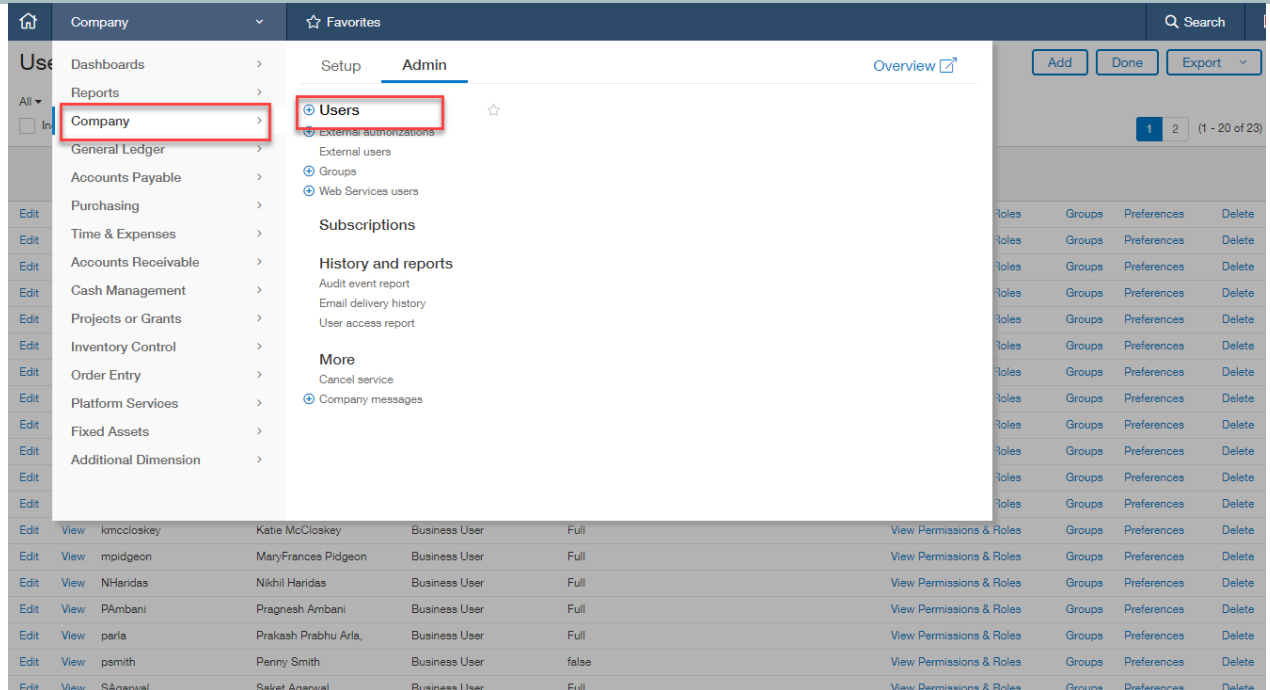


Validate that Platform Services is enabled

To Install AssetEdge, you will need to ensure that you have “Platform Services” enabled. Platform Services is free of charge when using AssetEdge. If you determine that platform services is not yet enabled in your company (instructions on how to do that are below), you will need to submit a case with Intacct support asking them to turn on Platform Services.

To determine if you have platform services enabled

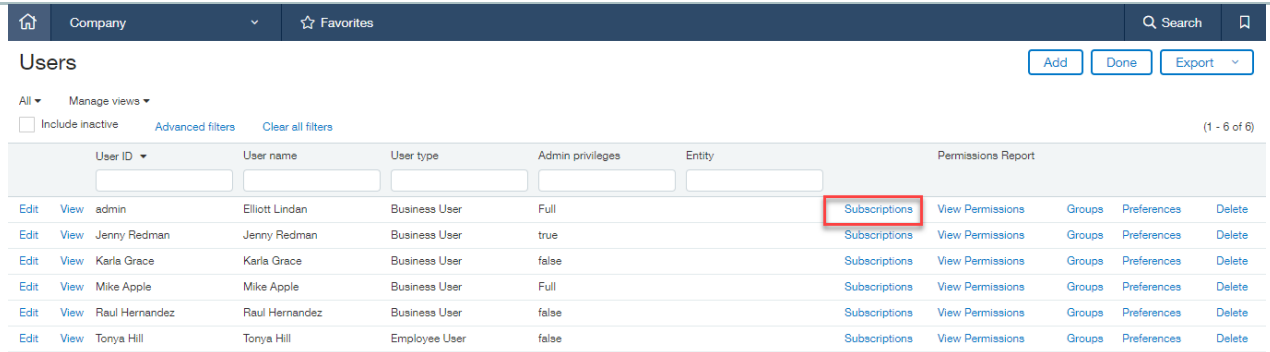
*log into Intacct and
navigate to “Company”
→ “Users”*



The screenshot shows the Intacct user management interface. The 'Company' menu is expanded, and the 'Users' option is highlighted with a red box. The 'Admin' tab is selected in the top navigation bar. The main content area shows a list of users with columns for 'Edit', 'View', 'Permissions & Roles', 'Groups', 'Preferences', and 'Delete'.

Edit	View	Permissions & Roles	Groups	Preferences	Delete
kmccloskey	Katie McCloskey	Business User	Full	View Permissions & Roles	Groups Preferences Delete
mpidgeon	MaryFrances Pidgeon	Business User	Full	View Permissions & Roles	Groups Preferences Delete
NHaridas	Nikhil Haridas	Business User	Full	View Permissions & Roles	Groups Preferences Delete
PAmbani	Pragnesh Ambani	Business User	Full	View Permissions & Roles	Groups Preferences Delete
parla	Prakash Prabhu Arla	Business User	Full	View Permissions & Roles	Groups Preferences Delete
pamith	Penny Smith	Business User	false	View Permissions & Roles	Groups Preferences Delete
SAnarwal	Saket Anarwal	Business User	Full	View Permissions & Roles	Groups Preferences Delete

If you are using user based permissions, Click the “Subscriptions” link next to any business users



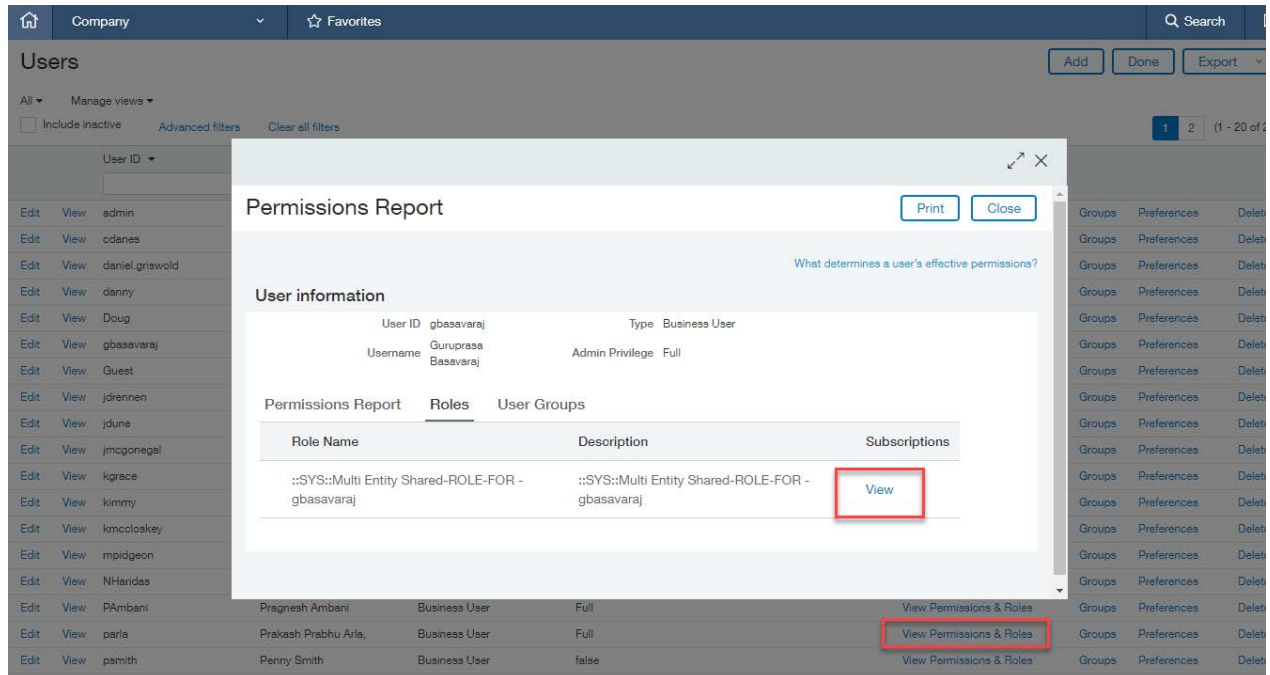
Users

Company Favorites Search Add Done Export

All Manage views Include inactive Advanced filters Clear all filters (1 - 6 of 6)

User ID	User name	User type	Admin privileges	Entity	Permissions Report
admin	Elliott Lindan	Business User	Full		Subscriptions View Permissions Groups Preferences Delete
Jenny Redman	Jenny Redman	Business User	true		Subscriptions View Permissions Groups Preferences Delete
Karla Grace	Karla Grace	Business User	false		Subscriptions View Permissions Groups Preferences Delete
Mike Apple	Mike Apple	Business User	Full		Subscriptions View Permissions Groups Preferences Delete
Raul Hernandez	Raul Hernandez	Business User	false		Subscriptions View Permissions Groups Preferences Delete
Tonya Hill	Tonya Hill	Employee User	false		Subscriptions View Permissions Groups Preferences Delete

If you are using Role-Based permissions, click on “View Permissions & Roles” then click the “View” link on the ensuing popup window



Users

Company Favorites Search Add Done Export

All Manage views Include inactive Advanced filters Clear all filters (1 - 20 of 20)

Permissions Report

Print Close

What determines a user's effective permissions?

User information

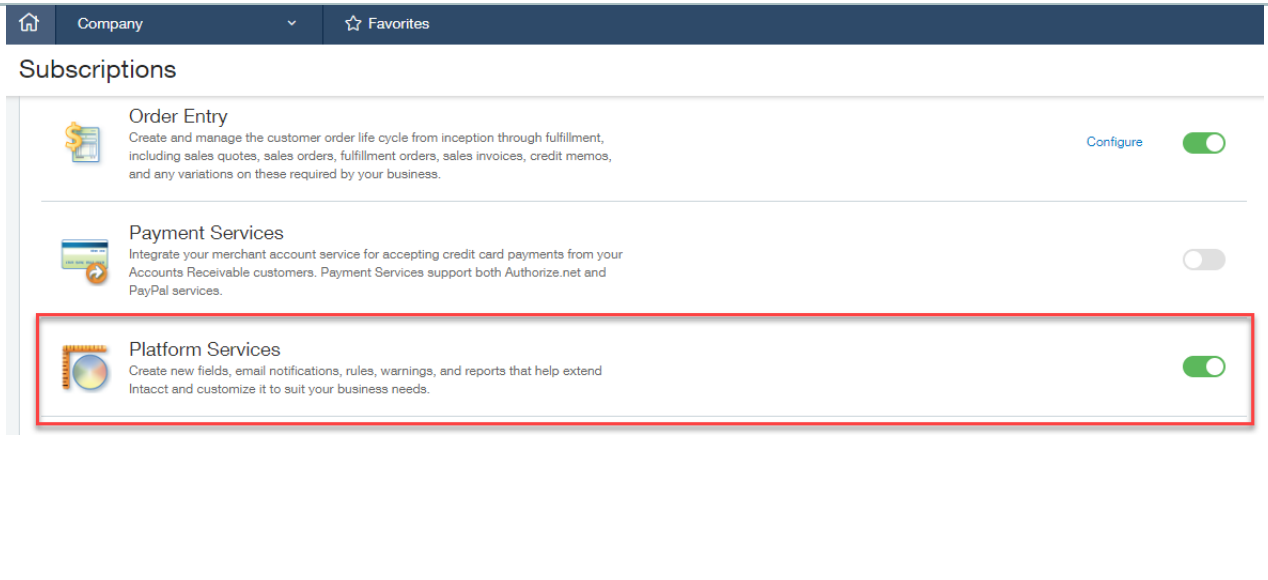
User ID gbasavaraj Type Business User
 Username Guruprasa Basavaraj Admin Privilege Full

Permissions Report Roles User Groups

Role Name	Description	Subscriptions
::SYS::Multi Entity Shared-ROLE-FOR - gbasavaraj	::SYS::Multi Entity Shared-ROLE-FOR - gbasavaraj	View




View Permissions & Roles View Permissions & Roles View Permissions & Roles

On the permissions screen, you should see a permissions link for "Platform Services". If you do not have this option, then Platform Services is not enabled and you will need to submit a case with Intacct support asking them to turn on Platform Services.



Company Favorites

Subscriptions

	Order Entry Create and manage the customer order life cycle from inception through fulfillment, including sales quotes, sales orders, fulfillment orders, sales invoices, credit memos, and any variations on these required by your business.	Configure <input checked="" type="checkbox"/>
	Payment Services Integrate your merchant account service for accepting credit card payments from your Accounts Receivable customers. Payment Services support both Authorize.net and PayPal services.	<input type="checkbox"/>
	Platform Services Create new fields, email notifications, rules, warnings, and reports that help extend Intacct and customize it to suit your business needs.	<input checked="" type="checkbox"/>