

Configure External Service Provider – Customer Instructions

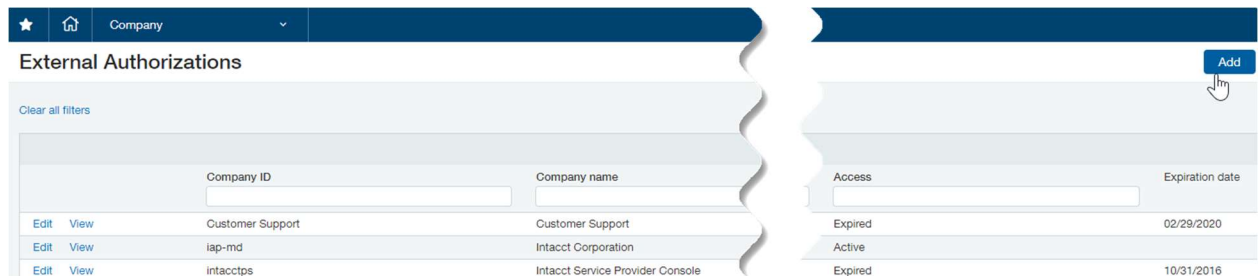
External Authorizations

An External Service Provider allows access to your company for your implementers. Through this set up, rather than logging into your company directly as a business or employee user, the implementers will slide into the company from a console.

There is no charge for this access. It is simply a convenient way for your implementers to have access as they work on your environment and/or provide you support. An *external authorization* record allows your implementer to access your company for a specified time period or until you disable the access. You are in total control of how long they have access and what level of administrative rights you wish to give them.

To Add an External Service Provider

1. Go to Company > Admin > External Authorizations and click the Add key.



2. In the **Company ID** field, type **Wipfli-VAR**.
3. Use the drop-down list in the **Access type** field to select Services.
4. If you want to add text describing the need for the authorization, enter the desired text in the **Description** field.
5. Use the calendar tool to enter a date in the **Expiration date** field. The authorization will expire on this date.

NOTE: The **Expiration date** cannot exceed 90 days from the day that you set it.

External Authorization Information

Company ID *
Wipfli-VAR

Access type ?
Services

Status
Not Linked

Access ?
Enabled

Description
Wipfli consultant access to Intacct

Expiration date *

May 2021						
Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

Go to External Users and Edit Admin Privileges

You have just completed giving your implementation team the ability to slide into your company instance. Now you will need to make sure that the administration level is correct for the External Services slide-in user.

The **External Users** list displays all external user records for your company. You can view and edit external user information from the **External Users** list.

To give administrative privileges

1. Go to Company > Admin > External Users
2. Click **Edit** next to the **Wipfli-VAR** user
3. Change the **Admin privileges** for the user to **Full**.

4. Click **Save**
5. Sage Intacct will ask you to verify your identity. Enter your user **Password** and click **Done**.
6. Email the partner contact that they now have access

External Users						
<input type="checkbox"/> Include inactive Clear all filters						
	Company ID	Default user	User ID	User name	User type	Admin privileges
Edit View	intacctps	<input checked="" type="checkbox"/>	ServicesIntacctps	Services User intacctps	Business	Off
Edit View	The Crown Console	<input checked="" type="checkbox"/>	ServicesThe Crown Console	Services User The Crown Console	Business	Full

External User Information

User Information Roles Information

User information

User ID

Services|Wipfli-VAR

Last name *

Wipfli-VAR

First name *

Services User

Email address *

smahoney@wipfli.com

Contact name

Services|Wipfli-VAR

User name

Services User Wipfli-VAR

User type

Business

Default admin privileges for new services users *

- Off
- Limited
- Full

Status

Active

Disable collaborate

Managing Expiration Dates

If the expiration date has passed for your partner's External Authorization, you will need to edit the External Authorization.

1. Go to Company > Admin > External Authorizations
2. Click **Edit** next to the desired external authorization
3. To extend the **Expiration Date**, click on the calendar.

NOTE: The **Expiration date** cannot exceed 90 days from the day that you set it

4. Click **Save**.

Disable an External Authorization

When the partner's work is complete, you should disable the external authorization. When an external authorization is disabled, no users associated with the external company can access your company. You can re-enable access at a later time as desired.

1. Click **Edit** next to the desired external authorization.

	Company ID	Default user	User ID	User name	User type	Admin privileges
Edit View	Wipfli-VAR	✓	Services\Wipfli-VAR	Services User Wipfli-VAR	Business	Full
Edit View	Customer Support	✓	intacct	Customer Support User	Business	Full
Edit View	System		system	System User	Business	Off

2. Use the **Access** drop-down list to select "Disabled".

External Authorization Information

Company ID
Wipfli-VAR

Company name
Wipfli LLP

Access type
Practice

User ID
CPAUser

Status
Linked

Access
Disabled

Enabled

Disabled

3. Click **Save**.

If in addition you want to inactivate the partner's External User in the External Users list so that it only shows current External Users, you can edit the record and mark the user as inactive:

NOTE: Never make CPAUser, Customer Support or System External User records inactive. These are used by Sage Intacct for access and support.

External User Information

User information

User ID
ExtUser|brittenford|charris

Last name *
Harris

First name *
Cathy

Email address *
cathy.harris@wipfl.com

Contact name
ExtUser|brittenford|charris

User name
Cathy Harris

User type ⓘ
Business

Admin privileges *
 Off
 Limited
 Full

Status
Inactive

Company ID

