

JOSEPH EVE INTACCT GUIDE

BASICS AND GETTING AROUND

LOGGING IN & MY PREFERENCES

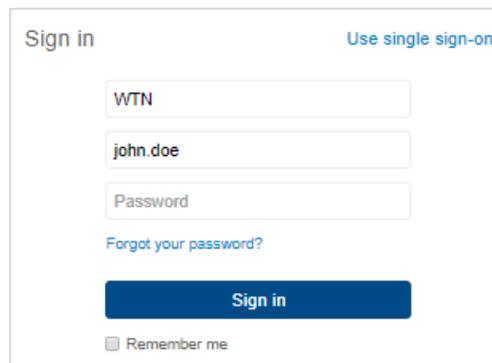
Company ID: WTN

User ID: Your user ID will be your firstname.lastname. For Example **john.doe**.

Password: you will receive an initial “Welcome to Intacct!” email with a temporary password. Any email concerning your user will come from noreply@intacct.com. It is recommended to add this address to your safe senders so your spam does not catch password resets.

How to Log In: Click the “Sign In” link in the welcome email. Your Company ID and User ID from above should auto-fill. Copy and paste the temporary password into the password field and click Sign In. On the next screen, paste the temporary password again and then create a new one, which you have to type twice. You will also be asked to create a security question for future password resets.

Log In Web Address: <https://www.intacct.com/ia/acct/login.phtml>



The screenshot shows a web form titled "Sign in" with a link for "Use single sign-on" in the top right. The form contains three input fields: the first is pre-filled with "WTN", the second with "john.doe", and the third is labeled "Password". Below the password field is a blue link that says "Forgot your password?". At the bottom of the form is a dark blue "Sign in" button and a checkbox labeled "Remember me".

After your initial login with your temporary password, you will be asked to change your password to something of your choice.

Change your password

Security question

Password Requirements

Make sure your new password is unique and significantly different from your old one. Your password must contain:

- 8 to 72 characters
- at least 1 number, 1 lowercase letter, and 1 uppercase letter
- 1 special character (`~!@#S%^&*()_+=|{}[] <>?/\,;'"`)

Two-step Verification: Intacct requires that every company use two-step verification to improve security. This forces the user to use an additional layer of verification to prove that they are themselves. The user is then allowed to save the method via which they logged in so that they do not have to verify their identity each time if using the same computer and browser.

Sign in with added security - How it works

Your administrator has set up an additional layer of protection. This 2-step security helps prevent anyone from signing in to your account by requiring a verification code.



Sign in as usual.



Receive a verification code via:

- App
- Text
- Call



Enter the verification code on your computer (to prove it's you signing in).

Want to skip verification?
If you sign in from a computer that only you use, mark it as a trusted device.

Cancel

Next >

Set up to receive verification codes.

Primary verification Backup verification Done

Via authenticator

Get codes on a device that has an authenticator app.

Via app >

Via text

We'll text verification codes to your mobile phone.

Via text >

Via phone call

We'll send verification codes in an automated phone call to your phone.

Via phone call >

Cancel

Primary verification Backup verification Done
Congratulations. Two-step verification is now configured.

Primary
Authenticator app

Backup
No secondary authentication methods defined

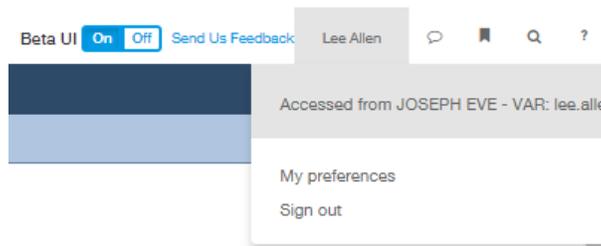
Is this a computer that you use regularly?

<p>If this is a computer that only you use, save time when signing in by identifying it as a trusted device.</p> <p>When you sign in from a trusted device, we won't prompt you for a verification code.</p> <p style="text-align: center;">Yes, trust this device</p>	<p>If this is a computer that you share, stay secure by identifying it as a device that isn't trusted.</p> <p>When you sign in from a device that isn't trusted, we'll prompt you for a verification code.</p> <p style="text-align: center;">No, don't trust this device</p>
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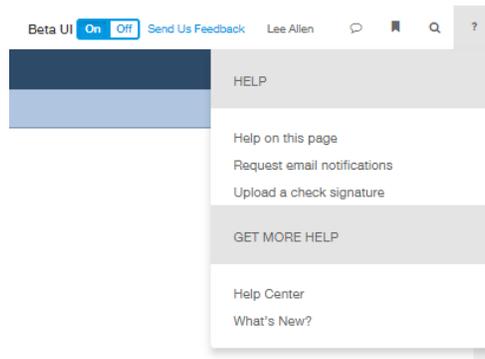
To change your two-step verification, point to Company and click My Preferences.

Other Tips

- Be sure bookmarks or favorites are 'clean' web addresses (use the address provided above)
- My Preferences: Hover over name in upper right corner → My Preferences



- Changing contact information here updates your contact record
- Will be logged out after 1 hour of inactivity (if you walk away from your computer or do not work in the Intacct tab) Inactivity means the screen does not refresh or you don't click any actual buttons. For instance, if you are entering a long journal entry that does not count as activity, you need to hit the 'draft' button which saves your work and does count as activity. Must sign in every 12 hours no matter what you are doing (this can be reduced in My Preferences)
- Email Notifications: you can set your preferences for receiving emails for when your approval is needed or if you were the submitter and want to receive confirmation that something was approved. Individual means one for every document approved, and consolidated means one email for every batch that is submitted to you or approved for you.
- Can change default landing page to a dashboard or commonly used module
- Can change and customize menu order
- Will want to change page defaults to maximum for better efficiency
- 'Save' changes to preferences
- Intacct Help: Hover over question mark "?" in upper right corner and click 'Help on this page' to see relevant content to the area in Intacct you are currently using. Once here, the help is completely searchable.



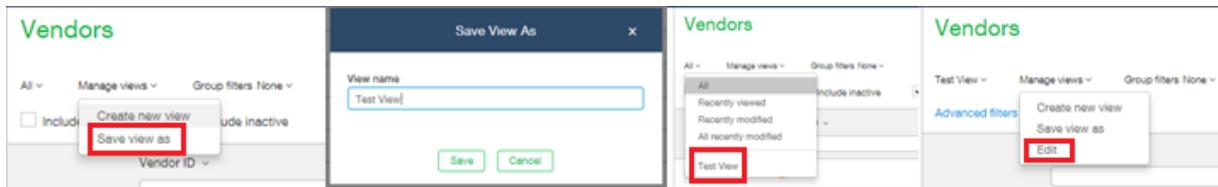
Efficiency tips

- Tabs can be duplicated to view bills on one screen and see journal entries or payment details on another (for example) using ALT+D then ALT+ENTER. You can also drag a new tab in by clicking and dragging the Lock symbol to the left of the web address.
- Be sure bookmarks or favorites are 'clean' web addresses (use the address provided above)
- The grey plus sign next to menu items $+$ is the 'quick add' button that takes you directly to the add screen for that record or transaction type
- There is an Overview menu for each module that gives you a pictorial view of the module's capabilities. You are taken directly to this view when you click on a module tab.
- User IDs and the company ID can be inserted into your bookmarked web address, so that those fields are already filled in when the log in page appears. You can insert your user ID into the following example:

<https://www.intacct.com/ia/acct/login.phtml?.company=WTN&.login=john.doe>

List Views: This section will show you how to view and edit list views in the different Intacct modules.

- Any time records or transactions are listed by clicking on their name from a drop-down, this is a list view
- List views can be customized by using certain columns, sorting, and filtering
- List views are useful when you need to see a specific set of records or columns on a regular basis
- To create a new view, click Manage Views and Save View As, this will duplicate the default view, so you can edit it. Give the new view a descriptive name.
- Now, switch to the new view by selecting it from the 'All' drop-down in the upper left corner. Once selected, under manage views click 'Edit'.



- The first step is the column selector; add and remove any columns you would like
- The second step is the column sequence. Note here that you can also change the column header names if you wish to see something else.
- The third step is filters, if you want the view to only display certain records
- The fourth step is sorting. Drag and drop the columns and then selecting what sort order for the columns you wish to sort by.
- The final step is to choose whether to deploy your view. This simply asks if you want the view to be available to all users with permission to that list.
- Switch your view back to All at any time by selecting All from the View drop-down
- **Caution: having a custom list view displayed can cause confusion the next time you come back to this screen so always check your View.**

DIMENSIONS

Intacct Dimensions refer to various lists of data attributes (e.g. Tribal Housing Unit, Customer, Program, Fund, etc...) that can be added to transactions in Intacct. The Dimensions can then be used to filter reports. The Fund, Funding Source, and Program Dimensions are required for every debit and credit made throughout the system, ensuring the ability to run a P&L by Fund or Program. Other dimensions will be utilized to help you capture useful information. Here is a list of Dimensions that have been setup for your use in all transactions:

- Tribal Housing Unit
- Customer
- Program
- Fund
- Funding Source
- Vendor

INTACCT ACTION

Intacct Action is Intacct's new user interface that will be rolling out early next year. This is simply a new way of navigating while logged into Intacct. Intacct has enabled the Intacct Action UI Beta so that users can start to become familiar with the new look and navigation as they are making their final changes.

This not only gives you a chance to become familiar with Intacct Action but allows you to offer feedback to Intacct regarding the new enhancement.

Intacct Action can be turned on and off at the user's discretion. At the top right of the screen underneath the user's name, click on [Enable Beta UI](#) . Each user can toggle back and forth in the new view by clicking the Beta UI On Off [Send Us Feedback](#) .