

Project Accounting vs. Project Dimensions Inside of Sage Intacct



ARTICLE 07.02.18 DEAN DORTON

Inside of Sage Intacct, the user is presented with a project accounting module and project dimensions. In our June CloudBytes- Massey's monthly webinar series for Sage Intacct customers- Jim Stubanas offers best practices for knowing when to set things up in the project accounting module vs. when to only use the project dimensions feature. Watch the full webinar above! For an introductory beginner guide for Sage Intacct Project Accounting, here are step-by-step directions for creating a project and creating a task.

Creating a Project

1. From the application menu bar, point to **Projects > Records > Projects** and then click **Add**.

The **Project Information** screen displays.

2. Type in **project ID 3COM01**.

Each project ID must be unique.

3. Type in the **project name 3Com Setup**
4. Select the **project category**
 - o **Contract**
5. Select the **customer 3COM** for the project.

This is required if you intend to bill/invoice the customer

6. Select **project manager Greg Ekker**.

This is required if you intend to use project manager-level approvals.

7. Select a **Billing Type**. Choose:
 - o **Time & Material**
8. Click on the Resources tab, select **jsmith—Smith, Josh**
9. Click Save.

Creating a Task

1. From the application menu bar, point to **Projects > Records > Projects** and then click **List**.

The **Project List** screen displays.

2. At the end of the row of the project you just created, click **Tasks**.

The list of tasks for your project displays.

3. Click **Add**.

The **Task Information** screen displays.

4. Type in **Uploads** for the name of the task.
5. Enter the planned beginning and end dates.
6. Check the **Billable** checkbox so this task will be billed back to the client.
7. Select **item D001-Data Loads**, the task is checked as Billable, therefore, the item is required for billing purposes.
8. Click the **Additional Info**
9. Check the **Utilized** checkbox this task is utilized.
10. Click the **Task Status** down arrow and then select **In Progress** as the status of this task.
11. Enter the planned duration of this task as 20.
12. Click Save.