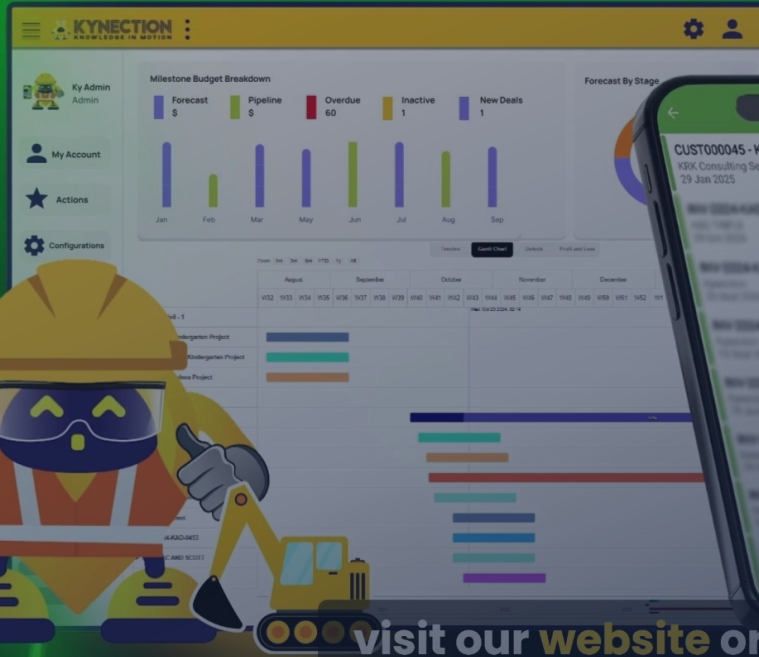


'FROM FIELD TO OFFICE'

KIM x SAGE creating One System



visit our website or



KYNECTION
KNOWLEDGE IN MOTION

INTEGRATION GUIDE

KYNECTION • ACCOUNTING INTEGRATIONS • SAGE INTACCT

Kynection and *Sage Intacct*

What the Sage Intacct integration removes from the day. Hours captured in the field flow to payroll and project costing, purchase orders raise and receive on a phone, and quotes and invoices carry through to Sage without being re-keyed.

4 CHAPTERS

4 MIN 22 SEC

ACCOUNTING INTEGRATIONS

OPERATIONS & FINANCE

INTEGRATION GUIDE • 4 MIN 22 SEC

What this integration covers

Four stages follow the data across both systems. Chapter 1 is where they meet. Chapter 2 is timesheets, projects and payroll. Chapter 3 is purchasing. Chapter 4 is sales and invoicing.

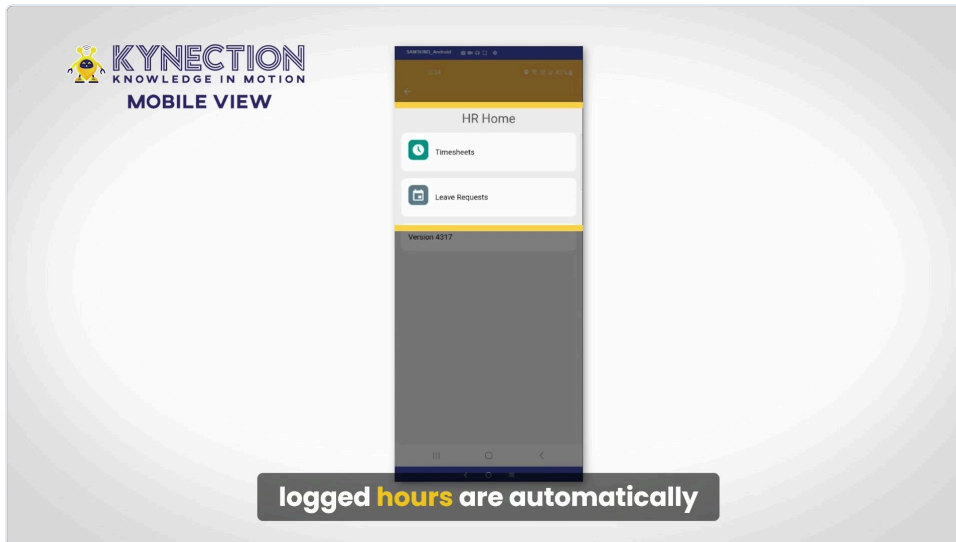
CH 01	Where the two systems meet One system from the worker's phone through to the finance ledger.	00:00–01:05
CH 02	Timesheets, projects and payroll Approved time becomes payroll and project cost in one move.	01:05–02:11
CH 03	Purchase orders and receiving Raised in the field, received on site, reconciled in Sage.	02:11–03:25
CH 04	Sales quotes and invoices The last leg: what was quoted and delivered becomes what is invoiced.	03:25–04:22

- **This is a capability guide, not a procedure.** It shows what the integration does and where each piece of data lands, rather than a click-by-click setup. Configuration is scoped with your account manager.
- **Field to office is the point.** Hours, receipts and approvals are captured where the work happens, then land in Sage without a re-key step in between.
- **Both systems are shown.** Screens alternate between Kynection and Sage Intacct so you can see which side each record lives on.

READ AS Screens are captured from the walkthrough video at the timestamp shown on each step, and show both Kynection and the accounting system. Company names, project codes and dollar values are demonstration data.

Where the two systems meet

One system from the worker's phone through to the finance ledger.

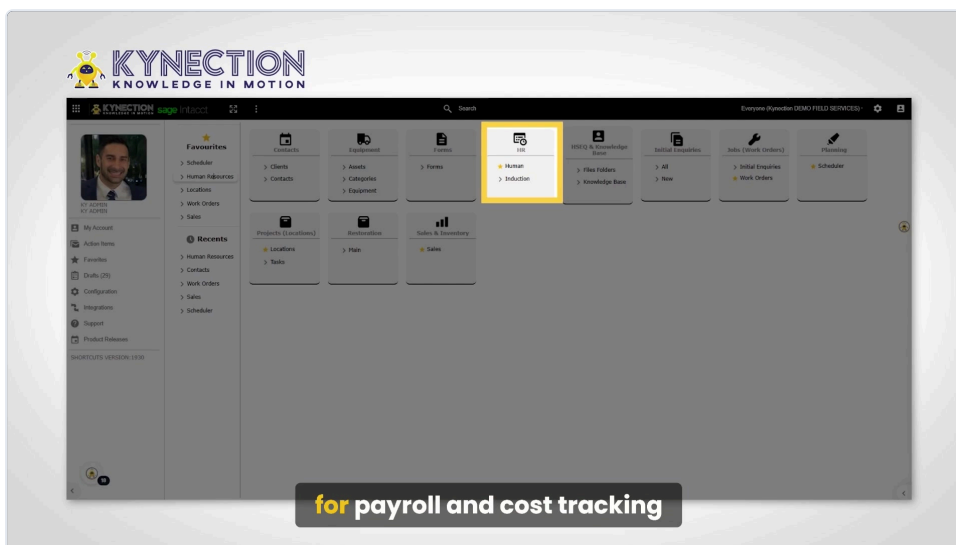


STEP 1 • 00:42 IN THE VIDEO

Capture in the field

Hours logged on the mobile app are captured where the work happens, on the same record the office sees.

CHAPTER 01 • STEP 1 OF 2



STEP 2 • 00:54 IN THE VIDEO

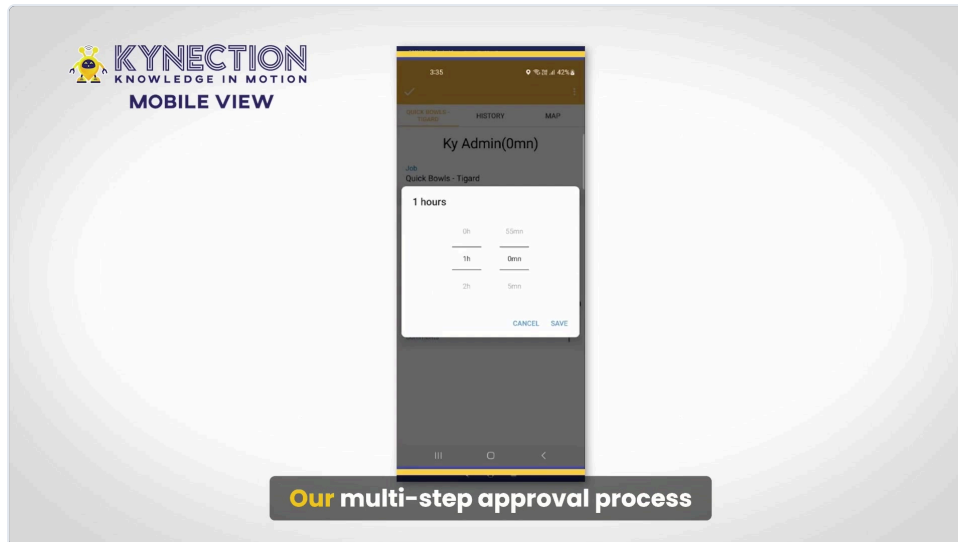
Read the operations picture

The Kynection dashboard carries the project, cost and payroll view that the integration keeps in step with Sage.

CHAPTER 01 • STEP 2 OF 2

Timesheets, projects and payroll

Approved time becomes payroll and project cost in one move.

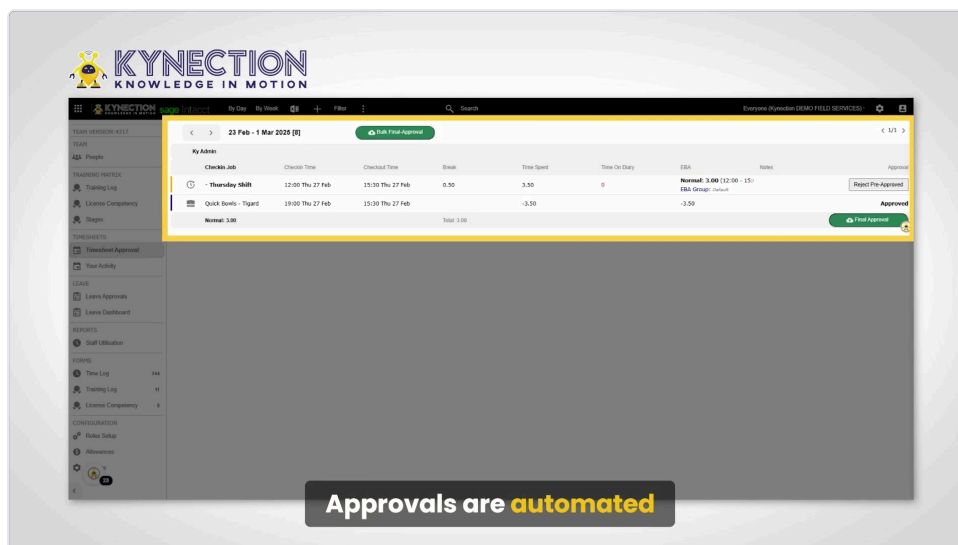


STEP 1 • 01:06 IN THE VIDEO

Approve on mobile

A multi-step approval process runs on the phone, so time is signed off by the right person before it goes anywhere.

CHAPTER 02 • STEP 1 OF 6



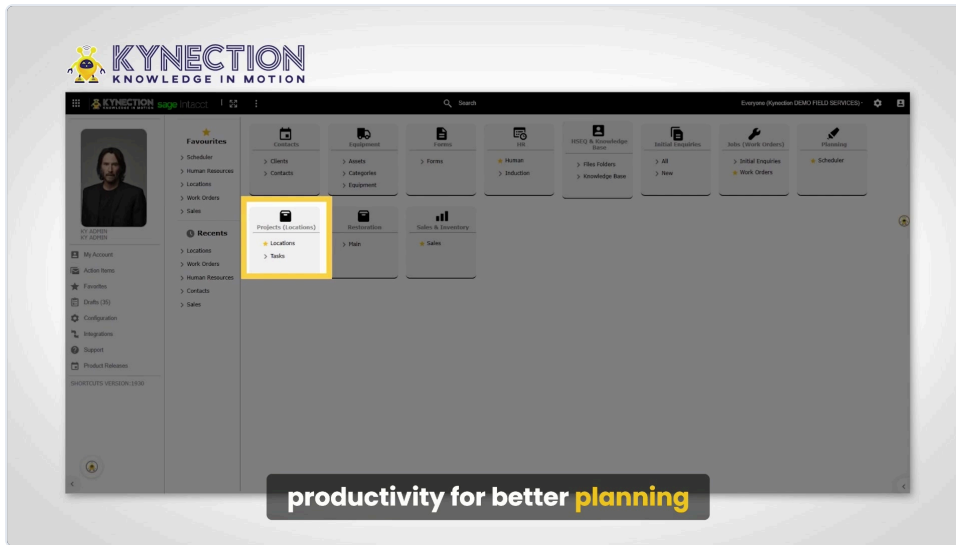
STEP 2 • 01:18 IN THE VIDEO

Automate the approvals

Approved timesheets flow through without anyone rebuilding them in a spreadsheet.

CHAPTER 02 • STEP 2 OF 6

Timesheets, projects and payroll

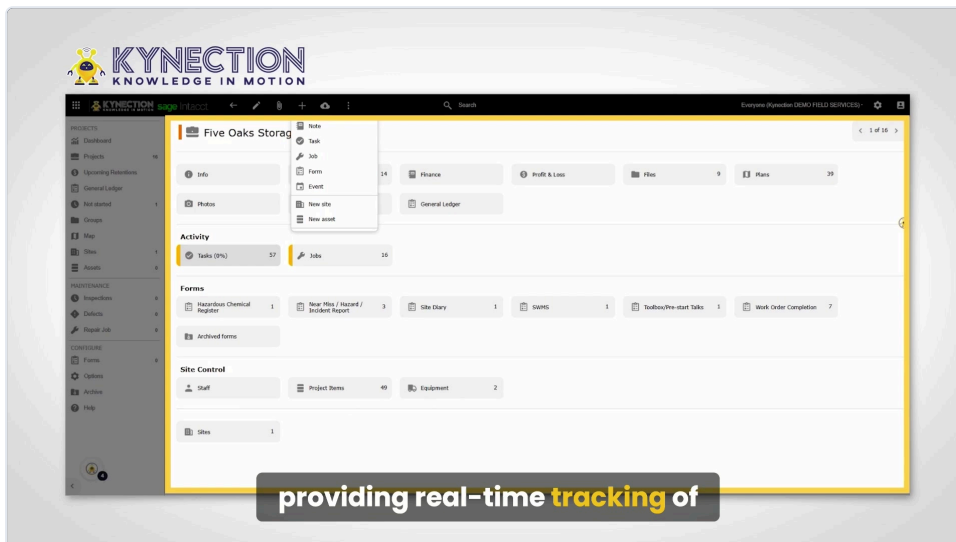


STEP 3 • 01:30 IN THE VIDEO

Keep the employee record current

The employee record carries the detail payroll needs, so planning and cost tracking work from the same source.

CHAPTER 02 • STEP 3 OF 6



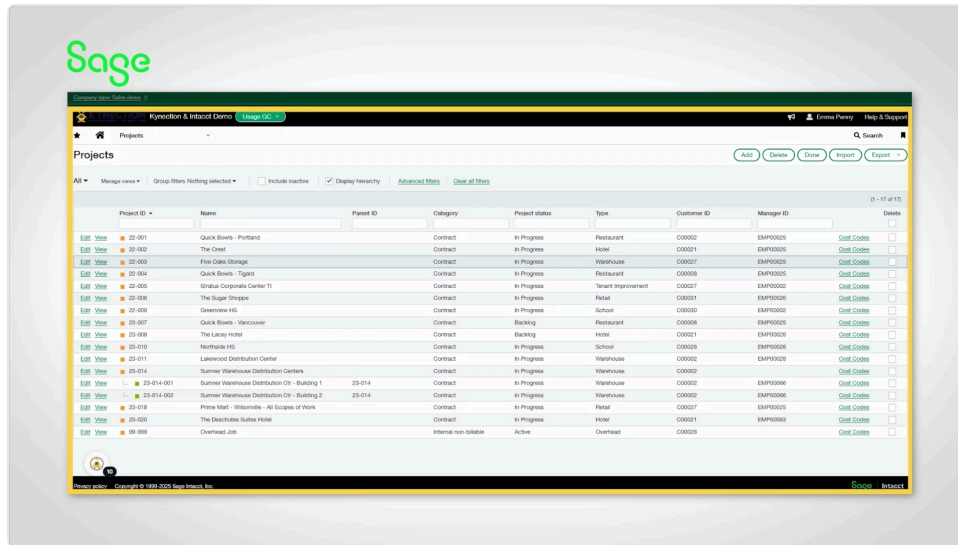
STEP 4 • 01:42 IN THE VIDEO

Track the project in real time

Project records update as work is logged, which is what makes cost-to-date meaningful rather than retrospective.

CHAPTER 02 • STEP 4 OF 6

Timesheets, projects and payroll

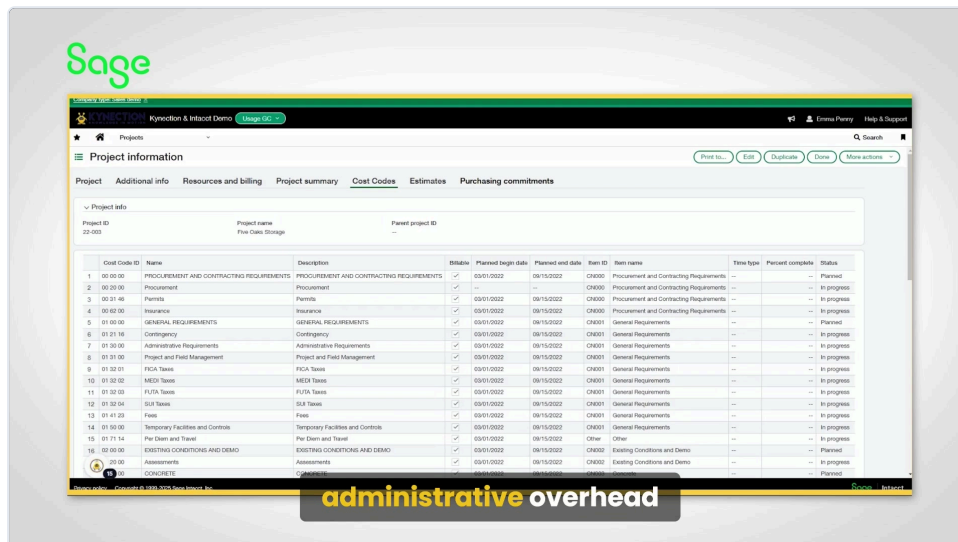


STEP 5 • 01:54 IN THE VIDEO

See it in Sage

The same projects appear in Sage Intacct with their status and financial detail.

CHAPTER 02 • STEP 5 OF 6



STEP 6 • 02:06 IN THE VIDEO

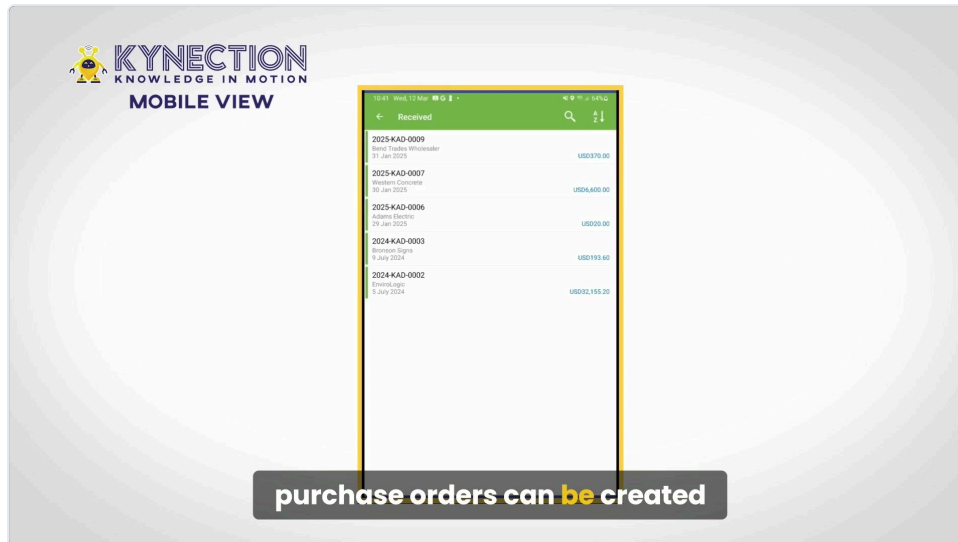
Cut the administrative overhead

Project information carries across rather than being entered twice, which is where most of the saved time comes from.

CHAPTER 02 • STEP 6 OF 6

Purchase orders and receiving

Raised in the field, received on site, reconciled in Sage.

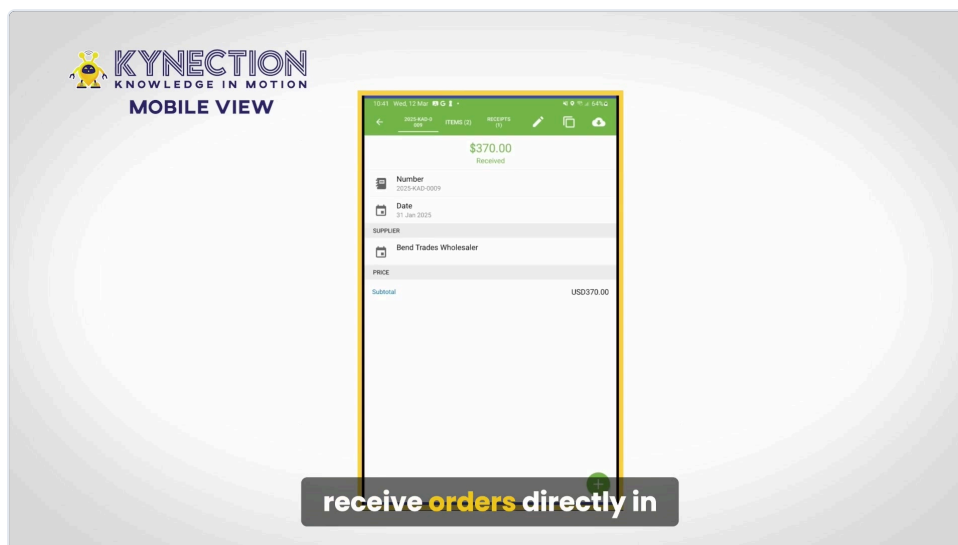


STEP 1 • 02:18 IN THE VIDEO

Raise a purchase order

Purchase orders can be created from the phone, at the point the need is identified.

CHAPTER 03 • STEP 1 OF 6



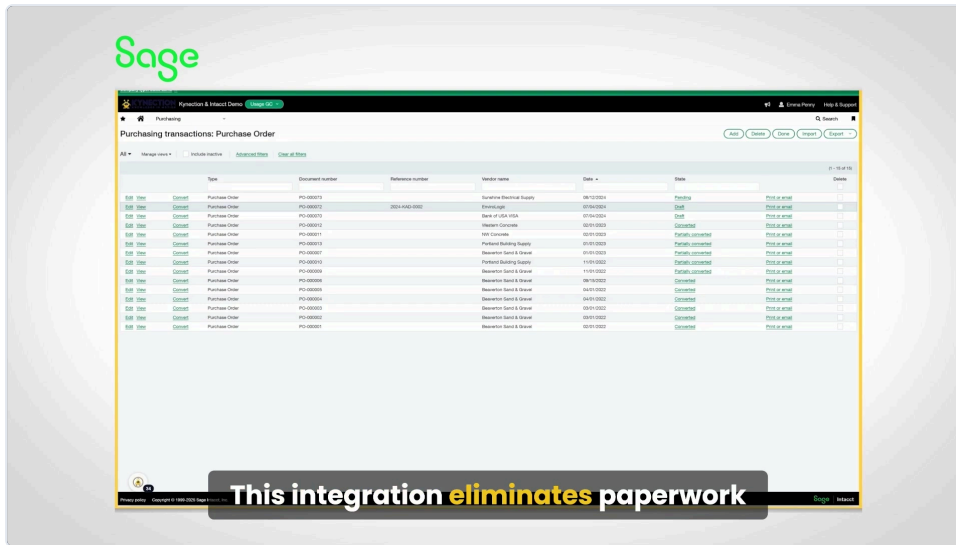
STEP 2 • 02:30 IN THE VIDEO

Receive against it on site

Goods are received directly in the app as they arrive, so stock and commitment stay current.

CHAPTER 03 • STEP 2 OF 6

Purchase orders and receiving

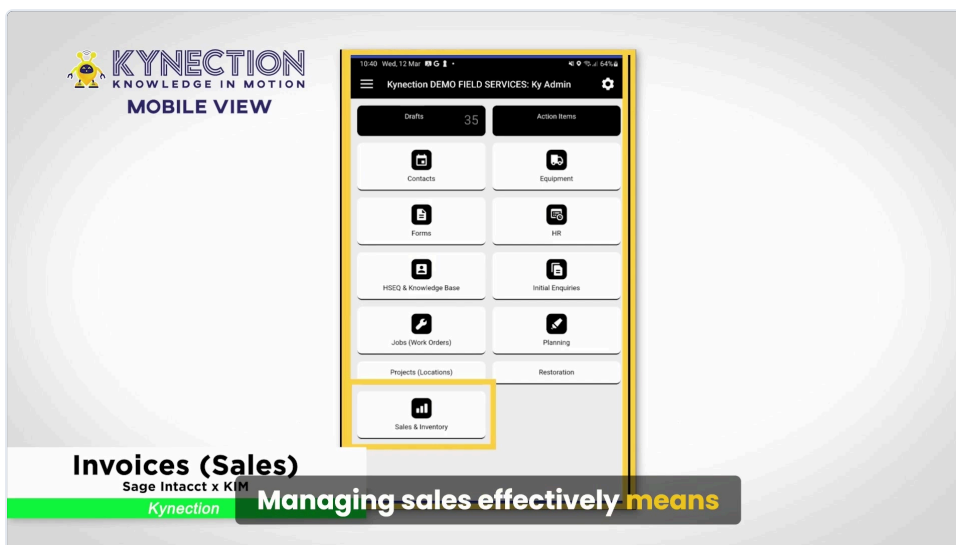


STEP 3 • 02:42 IN THE VIDEO

Reconcile in Sage

The orders appear in Sage Intacct, and the integration removes the paperwork that would otherwise sit between the two.

CHAPTER 03 • STEP 3 OF 6



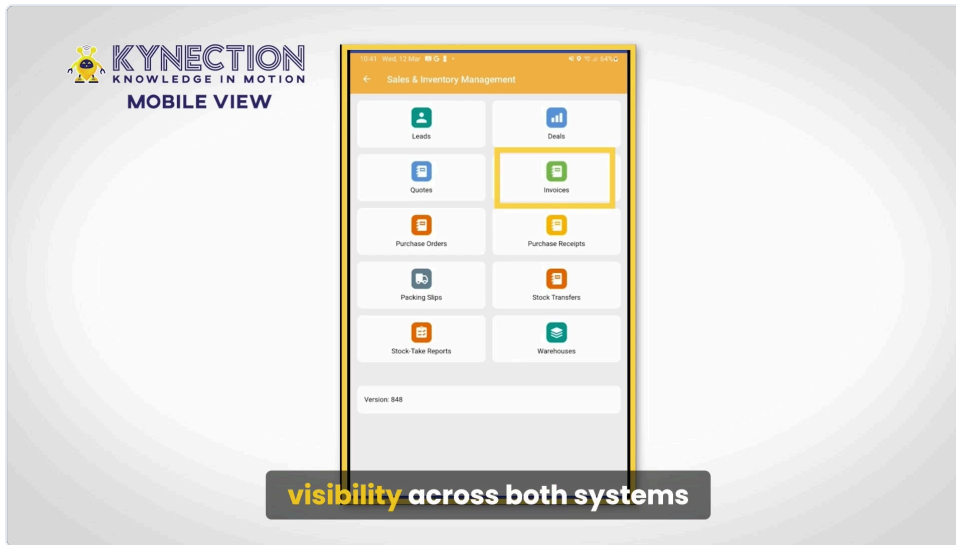
STEP 4 • 02:54 IN THE VIDEO

Work from one menu

The mobile app carries the whole set: contacts, equipment, forms, HSEQ, jobs, planning, projects and sales.

CHAPTER 03 • STEP 4 OF 6

Purchase orders and receiving

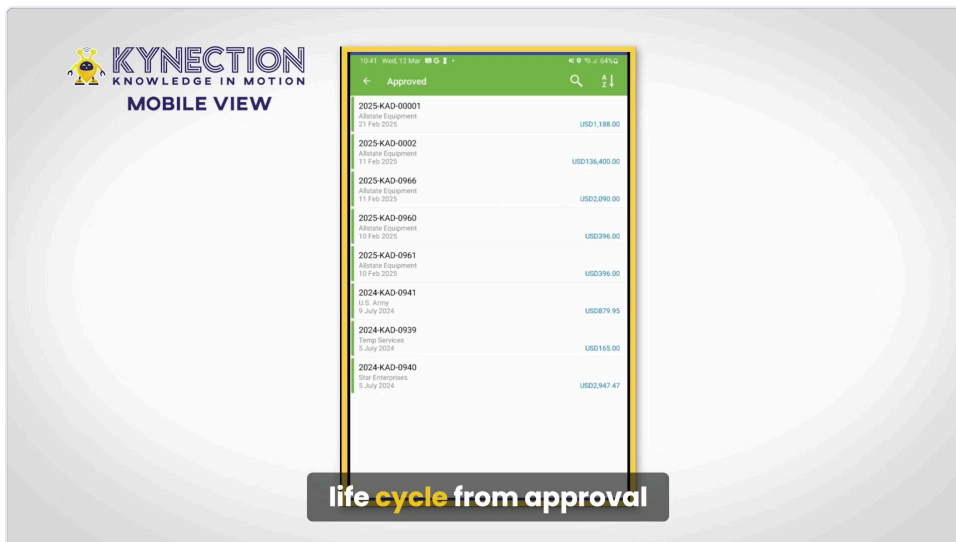


STEP 5 • 03:06 IN THE VIDEO

Keep visibility across both

The same records are visible on either side, so nobody is guessing which system is right.

CHAPTER 03 • STEP 5 OF 6



STEP 6 • 03:18 IN THE VIDEO

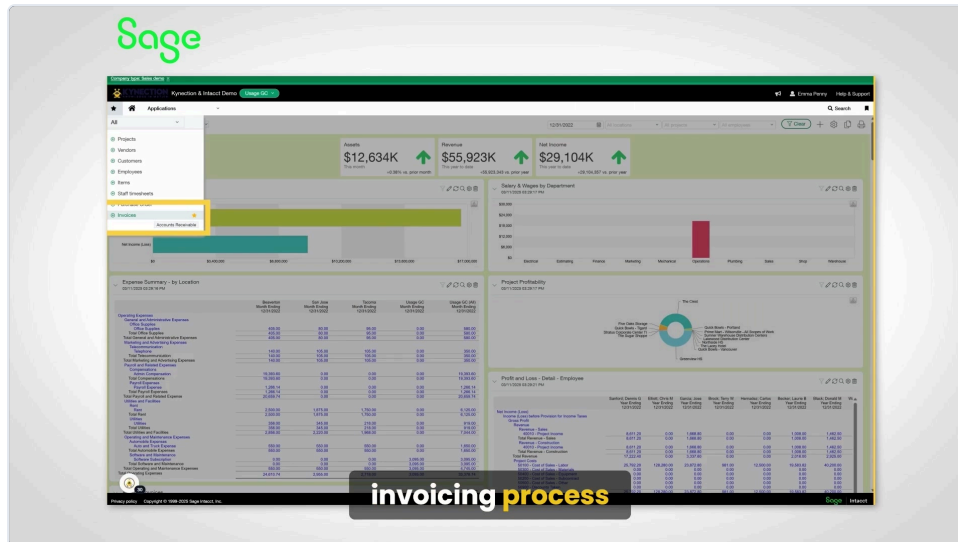
Follow the life cycle

An item can be followed from approval through to its completion in the ledger.

CHAPTER 03 • STEP 6 OF 6

Sales quotes and invoices

The last leg: what was quoted and delivered becomes what is invoiced.



STEP 1 • 03:30 IN THE VIDEO

Invoice from the same data

The invoicing dashboard in Sage draws on the delivered work, so what is billed matches what was done.

CHAPTER 04 • STEP 1 OF 1

Where to go next

Kynection integrates with both finance systems. The other guide in this series covers the alternative.

THE OTHER INTEGRATION - Accounting 02

Kynection and MYOB Acumatica

SEE IT ON YOUR OWN DATA

Contact your Kynection account manager to scope the integration for your finance system

MORE IN THIS MODULE

Accounting 02 **Kynection and MYOB Acumatica**
