

# Expensify to Sage Accounting Connector

Version 1.0

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# 1. Login & Setup

Follow these steps to setup the connector and synchronization with both Expensify and Sage Accounting.

## 1.1. Expensify to Sage Accounting Connector Login

Use the information in the email received from “Expensify to Sage Accounting Connector” after your purchase.

1. Go to URL: [accexpensify.soljit.com](http://accexpensify.soljit.com)
2. Enter your User Email and Password
3. Click the “Sign In” button.

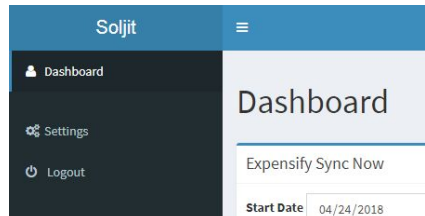
## 1.2. Expensify Integration Details

To Sync, the connector requires the following information from Expensify:

- Expensify User Id (partnerUserId)
- Expensify User Secret (partnerUserSecret)

1. Get this information from Expensify here:  
<https://integrations.expensify.com/Integration-Server/doc/#authentication>

2. Once you have this information, go back into the connector's Home Page, go into "Settings", enter the information, and click the "Save" button.



**Admin Settings** Change your integration and login settings

Expensify Integration Details

**Expensify PartnerId**

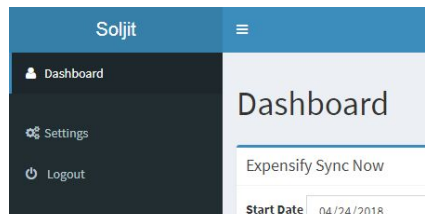
**Expensify PartnerSecret**

[Save](#)

### 1.3. Sage Accounting Authorization

To Sync, the connector requires authorization from Sage.

1. From the connector's Home Page, go into "Settings".

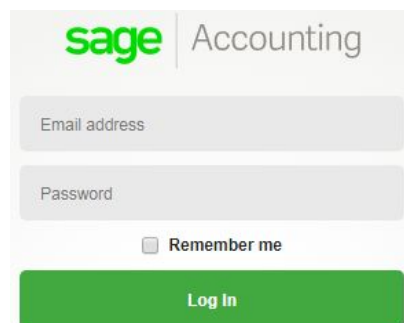


2. Under "Sage Accounting Authorization", click the "Authorize" button.

Sage Accounting Authorization

[Authorize](#)

3. This will take you to the Sage Login page.
4. Login using your Sage credentials to authorize the Sync.

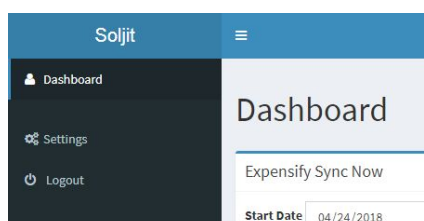


The image shows the Sage Accounting login interface. At the top left is the Sage logo in green, followed by the word "Accounting" in a grey sans-serif font. Below this are two input fields: "Email address" and "Password", both with light grey borders. Under the password field is a checkbox labeled "Remember me". At the bottom of the form is a prominent green button with the text "Log In" in white.

## 1.4. Add Users

The connector needs to know which users should be included in the Sync. To do so, follow these steps:

1. In the connector, go to the "Dashboard".



2. In "Manage Users", click the "+ Add" button.
3. Enter the user's First Name, Last Name, and Expensify User Id (email address).
4. Ensure that the "Active" box is ticked. In the future, you can untick this box if you want the Sync to stop for this user.
5. Click on "Add".
6. You can add users until your user license limit is reached.

Manage Users [Add](#)

Search:  Show 25 entries

Name	Email	Status	Actions
Ajay Singh	test@example.com	Active	<a href="#">Q</a> <a href="#">P</a>
Louis-Nicolas Hamer	lnhamer@example.com	Active	<a href="#">Q</a> <a href="#">P</a>
Michel Kassab	michel@example.com	Active	<a href="#">Q</a> <a href="#">P</a>
Nisar Ahmed	Nisar@example.com	Active	<a href="#">Q</a> <a href="#">P</a>
Santiago Ayola	santiago@example.com	InActive	<a href="#">Q</a> <a href="#">P</a>
T T	test1@example.com	Active	<a href="#">Q</a> <a href="#">P</a>
Test Demo	demo@example.com	Active	<a href="#">Q</a> <a href="#">P</a>

Showing 1 - 7 of 7 Records First Previous **1** Next Last

Add Manage User x

**First Name:**  **Last Name:**

**Email:**   Active

Back Add

## 1.5 Every 5 minutes!

Voilà! The connector is fully synchronized with both Expensify and Sage Accounting.

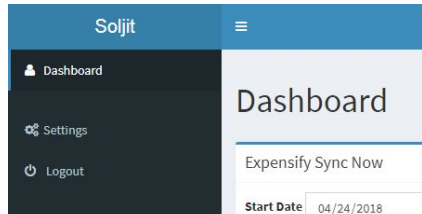
Every five minutes, the connector will import any new approved expense report from Expensify into Sage Accounting.

## 2. Other settings

### 2.1. One-time instant sync (not recurring)

To manually perform a sync (without waiting for the automated sync to occur every 5 minutes).

1. In the connector, go to the “Dashboard”.



2. Under “Expensify Sync Now”, specify the start date and end date for your first Sync.
  - **Start date** should be the approval date of the oldest Expensify expense report that you want to import into Sage Accounting.
  - **End date** should be the date up to which approved expensify reports will be fetched.
  - Afterwards the connector will Sync automatically for all active users every 5 minutes for future reports.

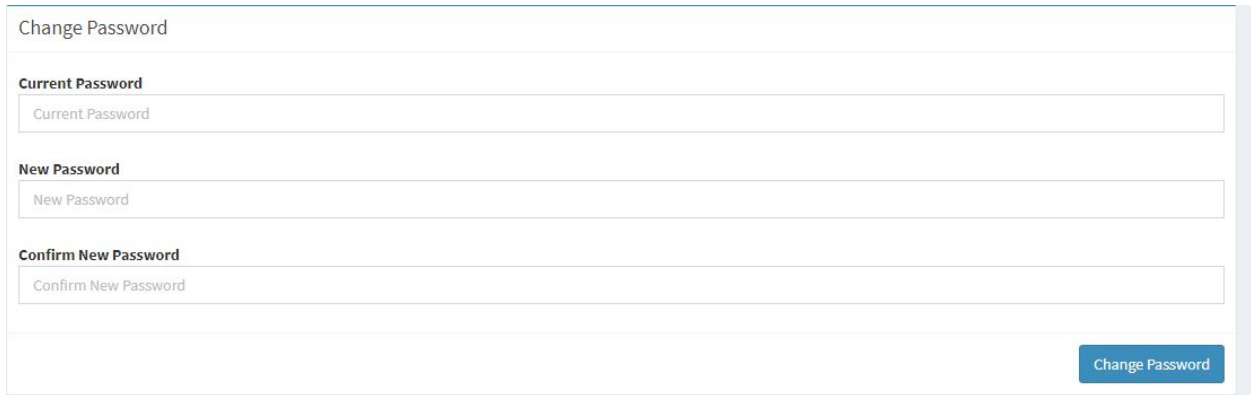
### 2.2. Email Notifications

In the connector, in “Settings”, you can receive emails showing a summary of reports that were synced.

Select the frequency of emails to ensure you do not receive too little or too many. Then click the “Update” button.

## 2.3. Change Password

In the connector, in “Settings”, you can change your password for the connector.

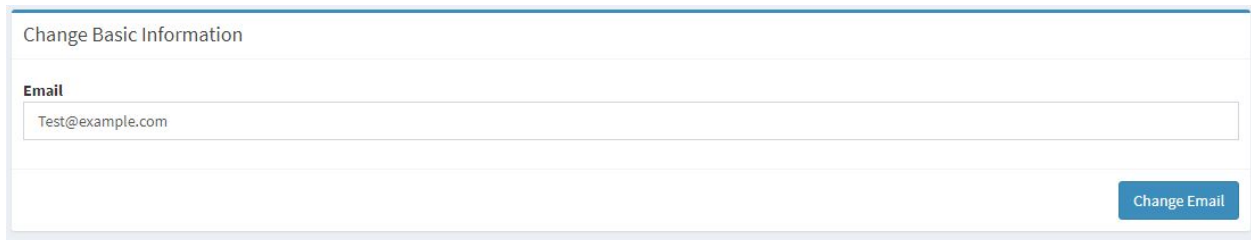


The screenshot shows a web form titled "Change Password". It contains three input fields: "Current Password", "New Password", and "Confirm New Password". A blue button labeled "Change Password" is located at the bottom right of the form.

Change Password	
<b>Current Password</b>	<input type="text" value="Current Password"/>
<b>New Password</b>	<input type="text" value="New Password"/>
<b>Confirm New Password</b>	<input type="text" value="Confirm New Password"/>
<a href="#">Change Password</a>	

## 2.4. Change Basic Information

In the connector, in “Settings”, you can change the email of the connector’s main user/admin.



The screenshot shows a web form titled "Change Basic Information". It contains one input field labeled "Email" with the value "Test@example.com". A blue button labeled "Change Email" is located at the bottom right of the form.

Change Basic Information	
<b>Email</b>	<input type="text" value="Test@example.com"/>
<a href="#">Change Email</a>	

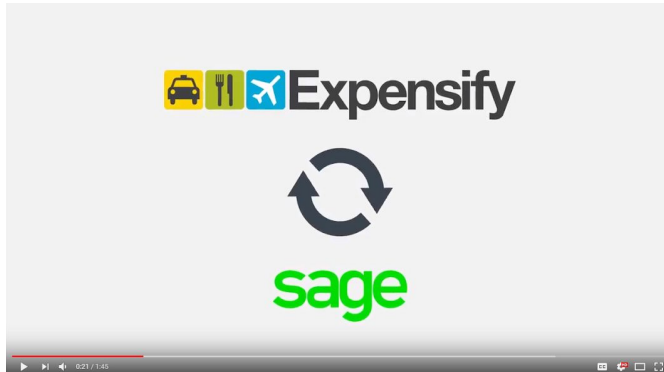


## 3. Support

### 3.1. Video

Expensify to Sage Accounting connector by SOLJIT

<https://www.youtube.com/watch?v=SEJ9FOxU7Es>



### 3.2. Online information

Expensify to Sage Accounting connector by SOLJIT

<https://www.soljit.com/shop/shop/expensify-to-sage-accounting-connector/>

### 3.2. Email

[support@SOLJIT.COM](mailto:support@SOLJIT.COM)

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[www.SOLJIT.COM](http://www.SOLJIT.COM)