PocketAdvantage Connector

Overview

DBSync PocketAdvantage Connector allows you to integrate data between Pocket Advantage application. The application is designed for sales rep and serves two purpose: (1) it assists in the field processing daily orders for wine, beer and spirits; and (2), also in back-office accounting applications like QuickBooks. As a result, it helps to streamline and automate the business process so that the data can be accurate, timely and functional. DBSync PocketAdvantage Connector allows you to move date in, and out, of Pocket Advantage application. The application connects directly to the PocketAdvantage application instance and enables the user to query, add, modify and delete various types of records including customers, Items, Orders, Sales order, Invoice, Credit Memo and much more.

The support for Pocket Advantage application can either be delivered via DBSync's iPaaS or can be installed on-premise.

Prerequisites

To establish a connection to PocketAdvantage via DBSync PocketAdvantage connector, user must:

- Have a valid license to DBSync PocketAdvantage connector, username and password to connect to DBSync iPaaS platform.
- Have a valid URL, username, password of PocketAdvantage.
- Be sure that PocketAdvantage has privileges to either read from their backend or write to their FTP server.

Connector Configurations

The DBSync's Pocket Advantage connector is available as a separate entity for reading data into PA and writing data out of PA. The classification for the Pocket Advantage connector is as follows.

1. PocketAdvantage Reader
2. PocketAdvantage Writer

The below table represent parameters required for opening the connection to PocketAdvantage user instance.

Property	Description	Required
Username	The username to login to either PA FTP or to their backend system.	Yes
Password	The password used to login to either PA FTP or their backend system.	Yes
Base URL	Base URL is the URL of the PA FTP/Backend on which they are hosted. The URL syntax while connecting to their backend/SqlServer is as follows: {**sqlserverHost**}::{**DBName**}::{**CompanyID**} The URL syntax while connecting to their backend/SqlServer is as follows: {**FTPHost**}::{**CompanyID**}::{**CompanyName**} **CompanyID**: is the unique identifier given by PA support staff to retrieve details of a specific company.	Yes

After a connector is created within a project, set up the connector within the project. DBSync can then map to, and from, the systems which are supported by our standard connector list. Next, it can use PocketAdvantage connector to retrieve data from PocketAdvantage backend or send data to PocketAdvantage FTP.

Click on the following link Connectors List to learn more about all connectors we support.

Uses Of Pocket Advantage Connector

Below are some of the business benefits of using DBSync's Pocket Advantage connector.

1. Synchronize Pocket Advantage Customers with Accounting Application.
2. Real-time Order sync between PA To Target Application Viz-A-Viz Ecommerce Application, Accounting Application any other ERP/CRM solution.
3. Integrate warehouse inventory of pocket Advantage with the Back-End systems.
4. Integrate payments received from customers to Accounting Systems.
5. Keep in Sync the Coupons, Deal prices on Items of Pocket Advantage with Inventory Product Items of any Back-End System.

Supported Methods

DBSync's Pocket Advantage connector is built on DBSync's API code framework. As a result, Business user can fully harness the capability of the connector to connect to various systems and improve productivity.

Below is a list of Easily Customizable API methods of pocket advantage connector.

1. **Read Order**: The read order method fetches orders data from the back end of the pocket advantage application.
2. **Update Customers**: The update customers method fetches data from the customer object of the QuickBooks through a Web-API call. Then, it stores the data in the buffer for further processing to any target application.
3. **Update Items**: The update items method fetches data from the Items object of the QuickBooks through a web-API call. Then, it stores the data in the buffer for further processing to the set target application, or database, or file server.
4. **Update Transact**: The update transact method fetches data from the Invoice object of the QuickBooks through a web-API call. Then, it stores it in the buffer for further processing to the set target application or database of file server
5. **Get Queue**: The get queue method fetches data from the Queue table and stores it in the buffer i.e. temporary storage of data read from the source application to, process it to the target applications/database.
6. **Update Order Status**: The update order status method returns the status from the Target application to write back to the source application.

Frequently Asked Questions

Q: **How does DBSync connect to Pocket Advantage?**
A: DBSync connects to PocketAdvantage through connector called Pocket Advantage Connector. The connector has an in-built API methods that open a connection to the pocket advantage application for data retrieval and data insertion.

Q: **When do we need this additional Integration coding?**

A: DBSync has a standard template built in for the clients of pocket advantage. If the scope of work involves other than the standard data flow supported by our standard template then, a user must write code to customize integration.

Q: **How does DBSync connect to Pocket Advantage?**

A: DBSync connects to Pocket Advantage through API calls. Either a web method or API methods should be exposed for other applications to consume it.

Q: What are the pre-requisites for software required for DBSync integration with PocketAdvantage?
 A: The valid account with Pocket advantage and valid license of PocketAdvantage connector.

 Q: Does DBSync need to be installed on the same machine as that of PocketAdvantage?
 A: DBSync works through cloud. This makes accessibility and maintenance easier without any additional installation(s).

Useful hint
To learn about PocketAdvantage application, follow the related links. However, to access their video tutorials, you must have a valid password. New customer can obtain a password by clicking on "**Email us**" from the tutorial page of the Inventiv website.

PocketAdvantage website

Inventiv video tutorials