Sage Intacct Connector

Overview

Sage Intacct connector is designed to allow a user to move data in, and out of, Sage Intacct on-demand financial application suite. As an Sage Intacct user, you can use DBSync's Sage Intacct connector to integrate any on-premise applications and legacy systems with Sage Intacct. This connector may also be used to integrate Sage Intacct with other on-demand or SaaS based applications - like CRM, E-Commerce, and others. Integrating with Sage Intacct consists of an XML request/response sent over an HTTPS connection. The technical details of this connection - such as request headers, error handling, HTTPS connection, etc. - are all elicited from the user to make implementation quick and easy.

Prerequisites

In order to establish a connection to your Sage Intacct account, from DBSync Sage Intacct connector, you'll need the following:

1. You must confirm that your Sage Intacct account is subscribed to the XML gateway. Secondly, you must make sure that you have privileges to connect to the Sage Intacct API. Your Sage Intacct representative can confirm this for you by providing you with a **send er ID** and **password,** specific to the integration API.
2. You must have Sage Intacct URL that you should connect to. The default is https://www.Sage Intacct.com/ia/xml/xmlgw.phtml. However, for your specific implementation, please confirm your URL with Sage Intacct.
3. You must understand which interface(s) and XML request you would like to integrate basing on your business and integration requirement.
4. You should also refer to Sage Intacct Developer site for detail description of the available interface. Supported API XML version is 2.1.

Connector Configurations

The Sage Intacct connector instance represents a single Sage Intacct account, including login credentials. If a user wishes to connect to multiple instances of the either sandbox/production then, s/he must create a separate connection for each and, configure the parameters accordingly. The table below represents parameters required for opening the connection to Sage Intacct user instance.

Property	Description	Required
Company Id	company Id is required field to login to Sage Intacct To locate the company ID in Sage Intacct, follow the steps below: 1. Hover over **Company** and then click **Company Info.** 2. The Company ID will be found in the ID field. 3. Make sure this ID is entered in the **Company ID** field in the **Sync** > **Login Info** section.	Yes
User Id	User ID to connect to Sage Intacct acccount.	Yes
Password	Password of the Sage Intacct account.	Yes
Sender Id	Sender ID is your api gateway credentials. Contact support, or your account manager at Sage Intacct, for more details	Yes
Control password	Application Control / Sender Password is your API gateway credentials.Contact support, or your account manager at Sage Intacct, for more details.	Yes
DTD version	Sage Intacct API DTD Version. 2.1 and 3.0 DTD.	Yes
Host Url	Sage Intacct Gateway Url. We default to 'api.Sage Intacct.com'.	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 that are supported by our standard connector list. It can then use Sage Intacct connector to retrieve data from, or send data to, Sage Intacct Platform.

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

This section gives out Trigger properties of Sage Intacct connector that needs to be set from Trigger section of DBSync.

Property	Description	Required
QueryType	Get or GetList.	Yes
Batch size	Batch size of requests to process.	Yes
Query	'Select' query to get records from Sage Intacct.	Yes

Supported Query format

The Sage Intacct Trigger allows DBSync core system to query entities from the Sage Intacct Backend services. Sage Intacct exposes a “get” and “get_list” interface which is masked using a “SELECT query syntax” exposed by the Sage Intacct connector. The “SELECT query” syntax is given below:

```
select [ fld, fld2, fld3,…fldn / *] <fields>
from <entity>
where [<fld1> opr <fld2>] <single_condition>
or/and[<fld1><opr> <fld2>,<fld3><opr><fld4>]|or/and[<fld5><opr><fld6]
<multiple conditions>
<where_clause>
order_by <fld1> asc, <fld2> asc, <fld3> desc <order_by_clause>
```

In the above-mentioned syntax:

Fields: The fields are actually the attributes, or the elements, within an entity that need to be fetched by the query. In case all the fields need to be fetched, an asterisk “*” can be used.

Entity: The entity which needs to be fetched from the Sage Intacct Backend.

Where Clause: The “where” clause takes in a series of “**or/and** “ conditions which internally contain the logical expressions (the operands) which need to be operated upon. Please note that only the first condition will have two expressions as operands and any other additional operand will be a single expression.

Please note that a “single_condition” is also supported which consists of a single expression in the where clause.

Order By Clause: The “order_by” clause allows the sort order to be specified for the fields fetched.

Note that, 'where', and, 'order_by', clauses are both optional and need not be specified. The “Query Type” property in Sage Intacct Trigger specifies whether it is a list query or a single select query.

Following are some examples

```
 Select * from Customer

 Select
Customerid,Name,Parentid,Termname,Custrepid,Shippingmethod,Custtype,Taxi
d,Creditlimit from Customer

 Select * from Invoice WHERE [whenmodified < 10/22/2010 00:00:00\]

 Select Recordno,Customerid,Name from Customer Where [Customerid =
ZAB001] AND [Recordno = 24]

 Select * from Customer [key=Key_Value]
```

This section lists Rule properties for Sage Intacct connector that needs to be set during the Rule setup in DBSync.

Property	Description	Required
External id	External reference column to be used for Upsert	Required when 'write type' is 'Upsert'
Table	Name of table to write transaction	Yes
Max Batch Size	Batch size of requests to process	Yes
Write Type	Insert, Update or Delete. Limited support for Upsert	Yes

Uses Of Sage Intacct Connector

The Sage Intacct connector makes it easy to work with Sage Intacct web service by:

1. Synchronizing Sage Intacct Customer, Items, Invoice and payment details with CRM Application back and forth.
2. Gives enterprises the ability to provide better customer services, access to additional up-sell, and cross-selling, opportunities.

Frequently Asked Questions

Q: How does DBSync connect to Sage Intacct?

A: DBSync connects to Sage Intacct platform through connector called Sage Intacct connector. This has inbuilt API methods that open a connection to Sage Intacct application for reading, and writing, data in, and out of, the platform.

Q: Does DBSync need to be installed on the same machine as that of Sage Intacct?

A: No. Since both, DBSync and Sage Intacct platforms, are available through cloud. If required DBSync is also available as on-premise version.

Q: How does Sage Intacct connector handle errors?

A: DBSync Sage Intacct connector handles processing of errors in different ways depending on the error type. Error can be tracked via log section of the DBSync platform. If there is a connection error, authentication error or schema validation error then, process level error is triggered.

> **Useful hint**
> https://developer.Sage Intacct.com/tools/
>
> https://developer.Sage Intacct.com/platform-services/
>
> https://developer.Sage Intacct.com/api/