

SageOne Connector

Overview

DBSync's SageOne connector is a highly customizable connector. It helps a user to connect SageOne application with many other applications - such as MSCRM, Salesforce, SkuVault, and databases. Integration can be done with applications available on the cloud only.

Prerequisites

In order to be able to use the DBSync SageOne connector, the user needs:

- A license for the DBSync SageOne connector. That is, a username and password to connect to DBSync iPaaS platform. And s/he also needs SageOne connector added to his/her account.
- A valid username and password to connect to SageOne.

Connector Configurations

SageOne connector instance represents a single SageOne account, including login credentials. If a user wishes to connect to multiple instances of the either sandbox/production then s/he needs to create a separate connection for each of the instances.

The parameters required to open the connection to a SageOne user instance are:

Property	Description	Required
Username	The username of staging Sage database.	Yes
Password	The password of staging Sage database.	Yes

After a connector is created within a project, set up the connector within the process. DBSync can then map to, and from, many systems using the SageOne connector to retrieve data from, or send data to, SageOne Accounting application. Click on the following link [Connectors List](#) to learn about all connectors DBSync supports.

SageOne Supported Operations

Note: {Key} specifies ID of the respective record in SageOne.

Operation	Use
Ledger_accounts	Get ledger account IDs
Tax_rates	Get tax rate Ids
Contact_persons	Add new Contact Persons
Contact_persons/{key}	Update Contact Persons
Contacts	Add new Contacts
Contacts/{key}	Update Contacts
Products	Add new products
Products/{key}	Update Products
Sales_invoices	Add new Invoices

Sales_invoices/{key}	Update invoices
Purchase_invoices	Add new purchase invoice
Sales_quotes	Add new Quotes
Sales_estimate	Add new estimates
Stock_movements	Inventory adjustment
Services	Insert Services

SageOne Supported Versions

We only support US version.

Uses of SageOne Connector

1. Eliminate manual data entry by connecting SageOne to other CRM, Accounting or Order management system, which is supported by DBSync.
2. Automate business process to increase efficiency across departments by reducing data reconciliation.
3. Make your Customer, Item, Vendor, Sales rep, Invoice, Invoice history, Sales order records as zero error prone as possible while moving in, and out of, SageOne.

Frequently Asked Questions

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

A: DBSync SageOne connector is available on Cloud only.

Q: What are the limitations of DBSync integration with SageOne?

A: The main limitation is that it applies to US version only.

Q: How does DBSync connect to SageOne?

A: DBSync connects to SageOne through Visual Integrator provided by SageOne to read data from, and write data out of, the SageOne application.

Useful hint

- <https://www.softwareadvice.com/accounting/sage-one-profile/>
- <https://reviews.financesonline.com/p/sage-one/>
- <https://developer.SageOne.com/docs/en/v1#contacts>