

Sage Intacct to Database Integration

Sage Intacct to Database Integration

- Setup your Database for Integration. In this Tutorial I am using Oracle Database named "**Sage IntacctDB**".
- Create table "**Account**" in Database with following script.

Database Script : MYSQL	Database Script : SQLSERVER	Database Script : Oracle
<pre>create table `Sage IntacctDB`.`dbAccount` (`AccountID` varchar(100) NOT NULL , `AccountName` text NOT NULL , `BillingStreet` text , `BillingPostalCode` numeric(20) , `AnnualRevenue` decimal(30,2) , `CreatedDate` date , `LastModifiedDate` datetime , `NumberOfOfficeLocations` int , PRIMARY KEY (`AccountID`));</pre>	<pre>create table dbAccount (AccountID varchar(100) NOT NULL , AccountName text NOT NULL , BillingStreet text , BillingPostalCode numeric(20) , AnnualRevenue decimal(30,2) , CreatedDate date , LastModifiedDate datetime , NumberOfOfficeLocations int , PRIMARY KEY (AccountID));</pre>	<pre>CREATE TABLE "SYS"."DBACCOUNT" ("ACCOUNTID" VARCHAR2(20 BYTE) NOT NULL ENABLE, "ACCOUNTNAME" VARCHAR2(100 BYTE), "BILLINGSTREET" VARCHAR2(50 BYTE), "BILLINGPOSTALCODE" VARCHAR2(50 BYTE), "ANNUALREVENUE" NUMBER(30,2), "CREATEDDATE" DATE, "LASTMODIFIEDDATE" VARCHAR2(40 BYTE), "NUMBEROFFICELOCATIONS" NUMBER(*,0), CONSTRAINT "DBACCOUNT_PK" PRIMARY KEY ("ACCOUNT ID"));</pre>

- Open www.mydbsync.com in your browser. Click on **Customer Login**.
- Enter your DBSync Username and Password to login. Click on **Launch** to navigate to the Project console.
- Click on Project on the left section of the console. Click on **Create New Project**. Enter project name as **Sage Intacct-Database** and click Save.
- A new Project will be created by the given Name. In this tutorial I have used name **Intacct-Database**.
- Click on Create New Process. Enter process name as **Sage IntacctToDatabase**. Click Save to save the process.
- Click on **Connectors** on the left section of the Project console. You need to create new Connectors for Database & Sage Intacct.
- Click on Create New Connector. Enter the Connector name as Sage Intacct. Select the Connector type as Sage Intacct Adapter and click Save.
- Enter all the required details, click **Save**. Then, **Validate connection**.
- Sage Intacct Connector is created and the connection is validated. Next, Database adapter needs to be created.
- Click on Connectors on the left section of Project console. Click on Create New Connector.
- Enter connection name as Database and select the Connector type as Database Adapter. Click Save.
- Enter all the required details. Click Save. Then, Validate connection.
- Click on Projects. Then, click on the project **Sage Intacct-Database**. Here, you will see the new process Sage IntacctToDatabase. Click on the newly created process Sage IntacctToDatabase.
- Using the button Create New Workflow, create the workflow "Execute".
- Click on workflow Execute. You will see two sections: Trigger on the top; and, Rules on the bottom.
- In the Trigger section, go to Advanced Query Builder and select Datasource as Sage Intacct.
- Click on Switch to Advanced view and enter the following query in the Query Builder. Click **Save and Close**.

```
select CustomerID, ignoreduplicates, name, parentid, shippingmethod,
custtype from customer
```

- In the Rules section of a workflow, click on Add New Rule. Select Target Connector, Operation, Target Object as Database, Insert and Account, respectively.
- Click on the Map in this newly created Rule. You will see a mapping screen.
- In the mapping screen, you will see a list of target fields on the left section. On the right, you will see the source fields under Schema.

- Drag and drop the required fields from Schema into the required source fields.
- Once you are done, close the mapping screen from Save and Close button on the top right. Save the workflow and make sure that the status of workflow is On.
- You can run the integration using the Run button; or, the Scheduler on the left section of the Project console. Run button is available once you open the Project.
- Using the button Logs on the left section, you can view the Logs.
- This concludes brief introduction on how to build DBSync integration data flow from Sage Intacct to Database.