Integrating with Sage Intacct Web Services

This course teaches developers how to use Sage Intacct Web Services to build integrations with external applications. You will make API calls to the Web Services gateway; use the Sage Intacct API Collection to create, update, and delete records; and initiate external processes based on data change and user action. You will also learn best practices for writing development patterns to make efficient requests, protect sensitive data, and optimize for volume.

Class Details

**Audience:** This course is designed for developers who use Sage Intacct Web Services to create integrations to external applications.

**Prerequisite(s):** Expertise in these areas:
- XML
- Internet programming languages (PHP, C#, and so on)
- Database design principles

**Class Length:**
- Classroom: 1 day, or
- Virtual Classroom: Two 3-hour sessions

**What You Need:** This is a hands-on course. Sage Intacct provides a sample environment for the activities. For the course, you need:
- A laptop (not a tablet) with a supported browser
- Internet; phone or headset for VOIP (Virtual Classroom only)
- Text editor, such as UltraEdit, Notepad++, emacs, vi/vim, and so on

**CPE Credits:**
- This course is eligible for 6 CPE credits
- The field of study is Computer Software & App
- The delivery method is Group Live or Group Internet Based

**Cost:** $800

Course Objectives

At the end of this course you should be able to:
- Describe the structure of XML requests and responses
- Use Postman to make API calls to the Web Services gateway
- Use the Sage Intacct API Collection to create, update, and delete records
- Initiate external processes using Smart Links, Smart Events, Integration Link Fields, Triggers, and Workflow Action
- Create Web Services integration users
- Write development patterns that reduce process time and promote successful integrations
- Structure internal requests and external code to protect sensitive data
### Course Topics

#### What is Web Services?
- Web Services requirements and authentication
- Schemas
- Libraries
- Transactions
- Concurrent connections and timeouts
- Web Services versus Platform Services

#### XML
- XML requests and responses
- Queries
- XML API functions overview
- Error handling

#### Making XML API Calls
- Installing and configuring Postman
- Making API calls to the Web Services gateway

#### More XML
- Inspecting objects
- Creating, updating, and deleting records
- Reading objects, list views, and custom reports
- Adding transaction control

#### Initiating API Processes
- Data versus user initiated API processes
- Data versus user initiated API processes
- When to use GET versus POST
- Initiating processes using Smart Links, Smart Events, Integration Link Fields, Triggers, and Workflow Action

#### Tools and Code Examples
- Advantages of using API classes
- API classes in other languages
- Creating Web Services integration users
- Working with the user interface

#### Patterns for API Success
- Making efficient requests
- Using Web Services API user accounts
- Referencing data with a loop
- Leveraging integration best practices
- Improving performance with transaction summary levels
- Optimizing for volume
- Protecting sensitive data
- Stepping up to advanced topics
- Development versus production

### More Information

For more information regarding registration, refund, concerns, and program cancellation policies, please see our FAQ at [www.sageintacct.com/training](http://www.sageintacct.com/training) or contact us at training@intacct.com.