

Sage Intacct Platform Services

Extend functionality to exactly match business requirements

Sage Intacct Platform Services is a springboard to solutions precisely tuned to individual business needs.

Accelerate customization

Today's businesses require infrastructure solutions to give them an extra edge over the competition, be that in efficiency and cost savings or by allowing them to make better decisions. Sage Intacct Platform Services is your ticket to making user expectations a reality.

Map and manage solutions with ease

Rather than building procedural programs and writing miles of code, Platform Services offers you an elegant object-centered solution. If you have any background in database development, you will quickly recognize the structures that drive Platform Services solutions. By centering all your actions and workflows around objects and related objects, you can build cohesive solutions that are easy to map and easy to manage.

Trustworthy infrastructure

Vital questions about any cloud-based system revolve around stability and security. The problems you might struggle to overcome in a stand-alone system—such as caching, error handling, permissions, and encryption protocol—are seamlessly built into custom platform solutions without any coding on your part.

Tools to match your solutions

Platform Services provides you with a wide range of tools to match the functions of online development:



Applications

When you require a solution with functionality and data structures outside the standard Sage Intacct applications, Platform Services applications pull together and display all the objects and menus that make up your unique solution.

Objects

Think of data tables that include all the field display instructions, actions, relationships, workflows, templates, data maps, and menus that relate to that data. These are objects—the building blocks of solutions that add custom functionality to Sage Intacct.

Relationships

Unlike many data applications that require code to link data tables, relationships allow you to define object interaction within the objects themselves. With a few clicks, you can create relationships between custom objects or from custom objects to standard objects.

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Platform Services

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Platform Services > Applications > View

Use this page to manage selected application components. Shortcuts to component lists: [Objects](#), [Menus](#), [Portals](#), [Hosted Files](#), [Reports](#), [Seed Records](#) and [Installed components](#).

Application Definition: Royalties

Edit PropertiesDeletePublishView Data Structure

Application Properties

Application Name

Royalties

Application Version

1

Deployed

☒

Description

Royalties application holds Royalty agreement data and creates periodic summations based on the terms of the Royalty agreement.

Selected Objects

[Royalty](#), [Royalty Summation](#), [Book](#)

Standard Objects

Selected Menus

[Royalties](#), [Royalty Summations](#), [Royalty Report](#)

Selected Portals

[Royalty Main Portal](#), [Royalty Portal 2](#)

System Information

Last Updated At

12/02/2020

ID

10003

Created At

03/29/2020

Original ID

113720@10003

Edit PropertiesDeletePublishView Data Structure

Selected Objects

[New Object](#) | [Create Object from Spreadsheet](#) | [Add Existing Object](#)

Platform Services Applications generate special solutions outside of the Sage Intacct standard applications

Page customization

Add HTML and JavaScript elements to pages, including AJAX elements using internal API requests and jQuery elements. White list external resources for use in page customizations.

Triggers

Automated behavior turns a data set into an application. Platform Services triggers offer a wide variety of actions that you can perform on objects and related objects. You can even use JavaScript to define complex conditions, data calls, and calculations.

Workflows

Platform Services solutions allow you to create your own workflows to process records. You can set actions, statuses, and multiple workflow paths that apply to records according to your specifications.

Templates

Templates share output from the functions in your solutions. Platform Services provides you with HTML and XML document template and email template capabilities.

Data Maps

Stored data maps allow users to quickly and accurately import data into custom objects. Multiple data maps to an object allow for flexibility based on source data.

Portals

Using portals, you can share and update objects through external sites. You can also manage user access to portal pages.

Custom Fields

Add custom fields to standard objects capturing additional information specific to your business.

Custom Tabs

Through relationships with standard objects, you can add custom tabs to standard application objects, organizing related object information for easy consumption.

Smart Rules

Create data validation rules on fields in standard objects to ensure compliance with company policy and data integrity.



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Platform Services > Objects > New

Objects are like database tables that you can manage visually. They are the basic building blocks of all Intacct applications. This form walks you through the first steps of creating a new Object Definition. You can define Objects to represent any kind of business data such as a Customer, Employee, Product, Quote, Invoice, Purchase Order, Partner, Project, Meeting, Conference, Bug Report, Support Request, Help Ticket, Asset, etc.

Object Properties & Attributes: New Object Save Cancel

Status Options Red = Required Information

☐ Enable this object as a user defined GL dimension
Additional fees may apply

Object Properties

Define a singular and plural name for this object definition. These names will be used throughout your Intacct account to refer to one or more records of this type.

Singular Name Example: Project

Plural Name Example: Projects


What are Records of this object called? The Record Name field is used in pages, views, selectors, and search results that reference records of this type.

Record Name Example: Project

The Integration Name is used to reference this object via merge fields and the Intacct web services APIs. This name must be unique. Be careful when changing the Integration Name as it may affect existing templates, formulas and integrations.

Integration Name Example: Project

Description

Object Icon Home 

Optional Object Properties

Utilize objects to customize your solutions

Smart Events

Embed actions into standard objects to automate field updates, communicate changes by email, or initiate external API calls.

Smart Links

Allow users to easily click to outside sites or display information from outside sites on Sage Intacct dashboards and pages.

Custom Reports

Create reports on standard and custom object data to provide greater visibility into your customers' unique business interests.

www.sageintacct.com/products/accountingsoftware/platform/solutions-services
888-591-5151



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EXACTLY MATCH BUSINESS REQUIREMENTS