Sync Investec to Sage One

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Hello! 👋

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SISO
- Syncing transactions automatically from Investec to Sage One
- The current methods of importing transactions are manual or where you have to give your credentials to a third party.
- Python, FastAPI, Heroku
- Using Vinces Python Investec OpenAPI Wrapper

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How it works

Retrieves the transactions from both Investec and Sage to compare.

Removes transactions already synced. Sage will have the transaction hash.

Compares manually added transactions in Sage One to stop duplication.

Imports the transactions that are left over.
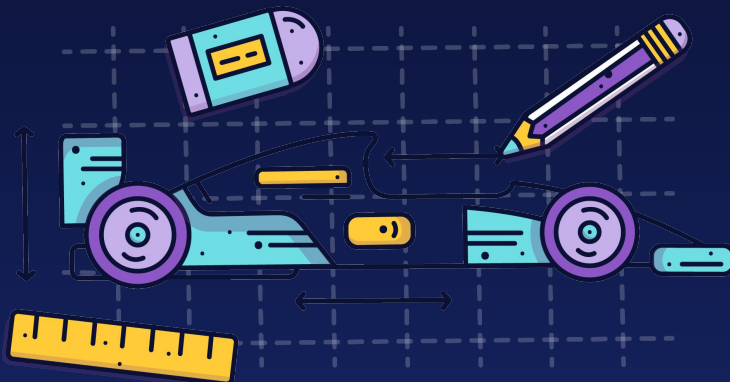
What I learned / challenges

Understanding the Sage One API took a bit of work. They have over 200 services that you can call.

Getting a sandbox account and Sage API access took time.

Building a Python Wrapper for the Sage One API is a big task.

I gained some knowledge on ODATA and how it relates to OpenAPI.

Live Demo

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Get involved

@Imraan Parker on Slack
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Repo & Installation Instructions
https://github.com/imraanparker/investec-to-sage-one

FastAPI
https://fastapi.tiangolo.com/

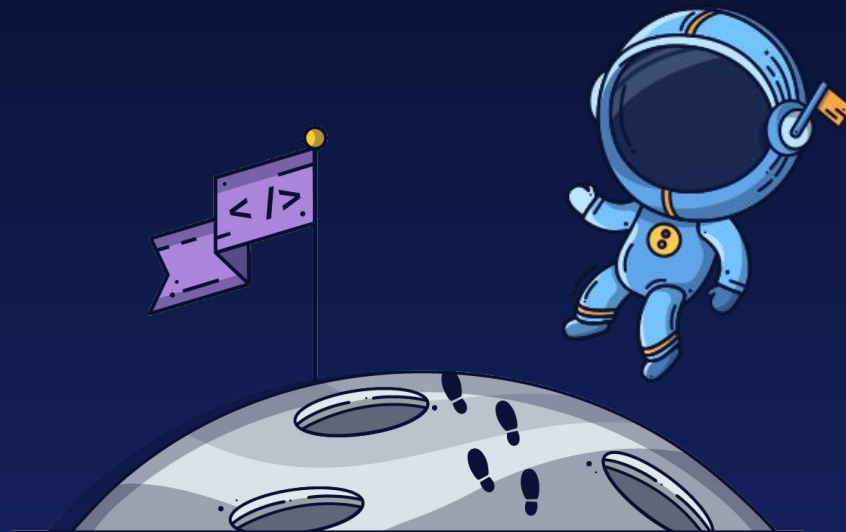Sage API
https://accounting.sageone.co.za/api/2.0.0

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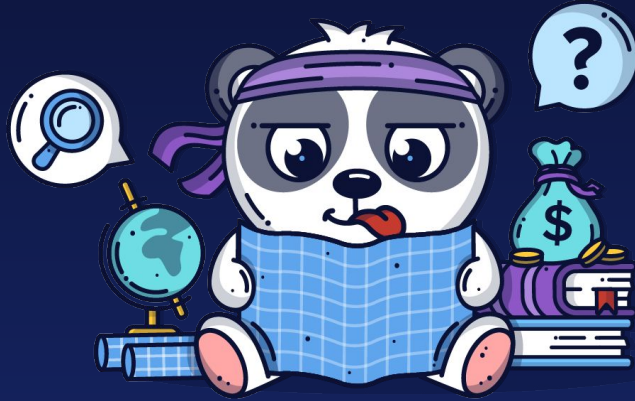
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Next Steps

Next steps

OAuth for the OpenAPI Interface.

Extend the Python Wrapper for the Sage One API.

Integrate with the OfferZen Finance App to get categories for transactions.

See how we can host this as a Service. No need to host it yourself.

Questions

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