



I100 Integration Scenarios

Anand Panchamia

Sr. ERP Solutions Consultant

Timing and Agenda

May 12, 2020 -10 AM -12 PM PT

Day 1

Part 1 : Data Providers

Part 2 : Import Scenarios

- 2.1 – Import New Master Records

May 13, 2020 -10 AM -12 PM PT

Day 2

Part 2 : Import Scenarios

- 2.2 : Updating Records by Using IDs
- 2.3: Deleting Incorrectly Imported Records
- 2.4: Importing Auto Numbered Records
- 2.5 : Master-Detail Records

Timing and Agenda

May 14, 2020 -10 AM -12 PM PT

Day 3

Part 2 : Import Scenarios

- 2.5 : Master-Detail Records (contd..)
- 2.6 : Importing with Attributes

Part 3 : Simplified Import Scenarios

Part 4 : Export Scenarios

- 4.1.1 : Exporting Customer Records
- 4.1.2 : Exporting Master Details Records

May 15, 2020 -10 AM -12 PM PT

Day 4

Part 4 : Export Scenarios

- 4.1.3 : Exporting Records with Attributes
- 4.1.4 – Exporting through Generic Inquiry

Part 5 : Performance Optimization

Part 6 : File Synchronization

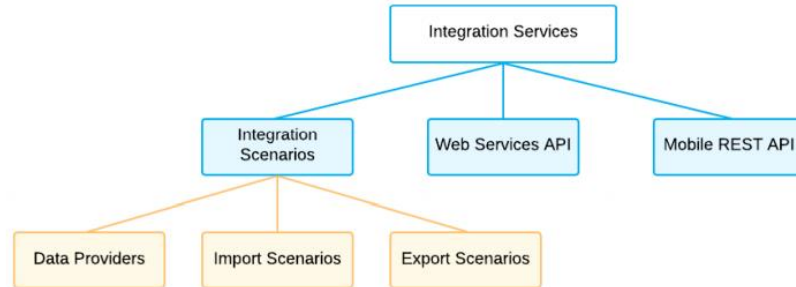


I100 Integration Scenarios

Overview

Acumatica ERP provides integration with external data sources and third-party systems through integration services. These integration services include the import and export of data by means of integration scenarios and interaction with external systems through the web services APIs and the mobile REST API.

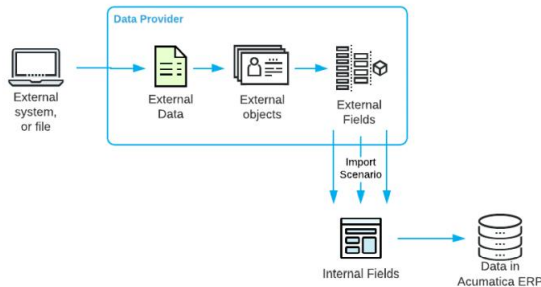
Acumatica ERP Integration Services



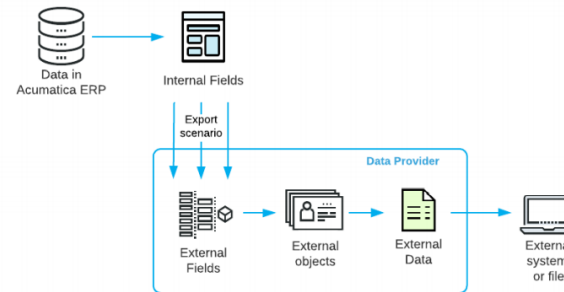
Integration scenarios have 3 components, sometimes 4.

- 1) Data Provider: The data type and available fields
- 2) Import scenario: How the fields are mapped and what logic steps are used when importing
- 3) Process Import Scenario: Pre-import step used to validate data and what data to import
- 4) Scheduling: This an optional step that can be used to schedule imports and exports for changing data sources to synchronize data, add records, etc.

Data Import Process



Data Export Process



In this lesson, you will create a file data provider that works with a CSV file, and a data provider that works with an Excel file.

1. Create a CSV Provider (Customers)
 - First Row should have column names
 - Field Delimiter should not be used in values
2. Create an Excel Provider (AR Invoices)
 - Must be an XLSX file. Old formats are not supported
3. SQL Data Provider
 - Server Parameters like SQLServer Instance Name, User, Password and Authentication Mode
4. Link a File Provider to an Existing File (Leads)

In this part you will learn how to create an Import Scenario for data import, update and deletion. We will see different ways in which these can be used and configured.

To demonstrate different scenarios we will be importing customer accounts, AR Invoices, Purchase Orders and Leads into the system.

Lessons :

- 2.1 – Importing New Master Records - *(End of Day 1)*
- 2.2 – Updating Records
- 2.3 – Deleting Imported Records
- 2.4 – Importing Auto-Numbered Records
- 2.5 – Master- Detail Record imports
- 2.6 – Importing with Attributes

We will import new customers records using a CSV file. Import Scenarios will be configured to identify customer by their IDs from the source file.

We will use the data provider Import/Export Customer created in the previous lessons.

Lessons :

- 2.1.1 – Review process of adding a new customer
- 2.1.2 – Create the Import Scenario
- 2.1.3 – Process the Import Scenario

End of Day 1



I100 Integration Scenarios – Day 2

Anand Panchamia

Sr. ERP Solutions Consultant

Recap – Day 1

May 12, 2020 -10 AM -12 PM PT

Day 1

Overview of Integration Services

- Web Services, Mobile REST API, Integration Scenarios
- Session focused on Integration Scenarios
- Data Provider, Import Scenario Mapping , Processing & Scheduling

Part 1 : Data Providers

- External Data Sources
- Creating Data Providers like CSV, Excel and SQL

Part 2 : Import Scenarios

- Import New Master Records
- Customer creation walk through
- Import Mapping
- Processing Imports

Agenda

May 13, 2020 -10 AM -12 PM PT

Day 2

Part 2 : Import Scenarios

- 2.2 : Create Import Scenario for Updating existing records
- 2.3: Deleting Incorrectly Imported Records
- 2.4: Importing Auto Numbered Records
- 2.5 : Master-Detail Records

In this lesson we will use Import Scenarios to update existing records. Configuration required to handle pop-up dialogs during the imports.

The scenario will be configured to look for existing customer records through their IDs in the source file.

We will also see the data synchronization options

Lessons :

- 2.2.1 – Review steps for updating customer class on the screen.
- 2.2.2 – Create the Import Scenario to mimic above steps
- 2.2.3 – Process the Import Scenario
- 2.2.4 – Data Synchronization types

In this lesson we will use Import Scenarios to delete imported records.

During this session we will see the usage of Source and Target Restrictions while using import scenario to filter out incorrect records and remove them.

During implementation - always consider creating snapshots for easy rollbacks if imports don't go as expected.

Lessons :

- 2.3.1 – Review action sequence for deleting a customer record
- 2.3.2 – Import Scenarios using Source and Target Restrictions
- 2.3.3 – Process the Import Scenario to delete customer records

In this lesson we will import new customers with auto numbering on.

Update existing auto numbered customer records by locating them using field values other than customer ID

Using Formulas in Importing Records with Automatic Numbering

Lessons :

2.4.1 – Imports with Auto-Numbered customers

2.4.2 – Using formulas in importing Auto-numbered customers

2.4.3 – Updating Auto Numbered customers using a custom key

2.4.4 – Updating customers with lookup

In this lesson we will import learn importing an AR Invoice with detail lines

We will also create a scenario update existing detail lines

Creating an import scenario to handle pop-up panel on document lines

Lessons :

- 2.5.1 – Imports AR Invoices with detail lines
- 2.5.2 – Updating Detail lines using line numbers
- 2.5.3 – Updating detail lines with a custom key *(End of day 2)*
- 2.5.4 – Applying an Action to an Imported Invoice
- 2.5.5 – Importing Purchase Orders
- 2.5.6 – Updating Purchase Orders
- 2.5.7 – Importing AR Invoices without duplicates
- 2.5.8 – Importing detail lines using a Pop-up panel

End of Day 2



I100 Integration Scenarios – Day 3

Anand Panchamia

Sr. ERP Solutions Consultant

Timing and Agenda

May 14, 2020 -10 AM -12 PM PT

Day 3

Part 2 : Import Scenarios

- 2.5 : Master-Detail Records (contd..)
 - 2.5.2 – Updating Detail lines using line numbers
 - 2.5.3 – Updating Detail Lines with a custom key (*End of Day 2*)
 - 2.5.5 – Importing Purchase Orders (*skip this Lesson*)
 - 2.5.6 – Updating Purchase Orders (*skip this Lesson*)
- 2.6 : Importing with Attributes - (will be skipped)

Part 3 : Simplified Import Scenarios

Part 4 : Export Scenarios

- 4.1.1 : Exporting Customer Records
- 4.1.2 : Exporting Master Details Records

In this lesson we will import learn importing an AR Invoice with detail lines

We will also create a scenario update existing detail lines

Creating an import scenario to handle pop-up panel on document lines

Lessons :

- 2.5.1 – Imports AR Invoices with detail lines
- 2.5.2 – Updating Detail lines using line numbers
- 2.5.3 – Updating detail lines with a custom key *(End of day 2)*
- 2.5.4 – Applying an Action to an Imported Invoice
- 2.5.5 – Importing Purchase Orders *(skip this Lesson)*
- 2.5.6 – Updating Purchase Orders *(skip this Lesson)*
- 2.5.7 – Importing AR Invoices without duplicates
- 2.5.8 – Importing detail lines using a Pop-up panel

Simplified Import Scenario reduces the # of steps and screens required to create an import.

The entire import can be mapped and processed from the same screen.

This is limited to a few screens only and limits to simple imports

Lessons :

3.1.1 – Import Stock Items

In this lesson we will learn how to export master records, header-detail (invoices) records and exporting from a generic inquiry.

Exports will be done to a CSV and invoices will be exported to an excel file

Lessons :

- 4.1.1 – Export Customers
- 4.1.2 – Export AR Invoices (*End of Day*)
- 4.1.3 – Export with Attributes (skipped)
- 4.1.4 – Export with Generic Inquiry

End of Day 3



I100 Integration Scenarios – Day 4

Anand Panchamia

Sr. ERP Solutions Consultant

Timing and Agenda

May 15, 2020 -10 AM -12 PM PT

Day 4

Part 4 : Export Scenarios

- 4.1.4 – Exporting through Generic Inquiry

Lesson 4.2 : Updating Records Using Export Scenario

- 4.2.1 : Updating Customer Records
- 4.2.2 : Recalculating Price on Invoice while running Exports

Part 5 : Performance Optimization

Part 6 : File Synchronization

Lesson 2.6.1 – Importing Records with Attributes

Lesson 4.1.3 – Exporting Records with Attributes

In this lesson we will learn how to export master records, header-detail (invoices) records and exporting from a generic inquiry.

Exports will be done to a CSV and invoices will be exported to an excel file

Lessons :

- 4.1.1 – Export Customers
- 4.1.2 – Export AR Invoices
- 4.1.3 – Export with Attributes (skipped)
- 4.1.4 – Export with Generic Inquiry
- 4.2.1 – Update Customers using Export Scenario
- 4.2.2 – Recalculate Price on AR Invoices using Export Scenario

We will review some simple tips to optimize performance on Import Scenarios

Tips :

1. Concept of Commit
2. For Export Scenarios, avoid using =Every, if export isn't writing back data
3. Generic Inquiry handles large requests more efficiently

We will configure regular update of customer records by synchronizing an external file and also review an automated export of AR Invoices

Lessons :

- 6.1.1 – Scheduling Customer Import
 - Configuring Automated File Synch
 - Automating Customer Imports

Thank You!

Stay Safe