

I330 Data Manipulation with REST API

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Timing and Agenda

June 9, 2022 -10 AM -11 AM

Day 1

Lesson 1.1: Creating a Shipment for Sales Orders

Lesson 1.2: Creating a Stock Item with Attributes

Lesson 2.1: Updating a Customer Account

Lesson 2.2: Updating the Detail Lines of a Sales Order

June 11, 2022 -10 AM -11 AM

Day 2

Lesson 3.1: Releasing an Invoice

Lesson 4.1: Registering a Customer Credit Card

Lesson 5.1: Adding a Note to a Stock Item Record

Lesson 5.2: Attaching a File to a Stock Item Record

Day 1



Part 1: Creation of Records

Lesson 1.1: Creating a Shipment for Sales Orders

Learning Objectives

In this lesson, you will learn how to create a new record in Acumatica ERP by using the contract-based REST API.

SO 000004 - Jevy Computers

ACT

CREATE SHIPMENT

HOLD ...

DETAILS

TAXES

COMMISSIONS

FINANCIAL

SHIPPING

ADDRESSES

SHIPMENTS

PAYMENTS

TOTALS





 ADD ITEMS ADD INVOICE ITEM AVAILABILITY   

U	D	* Branch	* Inventory ID	Free Item	Warehouse	Line Description	* UOM	Quantity
U	D	MYSTORE	AALEGO500	<input type="checkbox"/>	MAIN	Lego 500 piece set	PIECE	10.00
U	D	MYSTORE	CONGRILL	<input type="checkbox"/>	MAIN	Char-Broil Classic 480	PIECE	1.00

Lesson Summary

In this lesson, you have learned how to create a record in Acumatica ERP by using the contract-based REST API.

During record creation, you have submitted the fully configured record (with all detail lines) in one request.

Lesson 1.2: Creating a Stock Item with Attributes

Learning Objectives

In this lesson, you will learn how to create records with attributes.

Lesson Summary

In this lesson, you have learned how to create records with attributes through the contract-based REST API. To specify the values of the attributes of a stock item, you have used the Attributes field of the StockItem entity.

To identify the attribute whose value you need to specify, in the AttributeID field of the AttributeValue entity, you have specified the attribute name or attribute identifier.



Part 2: Update of Records

Lesson 2.1: Updating a Customer Account

Learning Objectives

In this lesson, you will learn how to update an existing record by using the contract-based REST API.

Figure: Customer record

Customers

C000000003 - Jevy Computers

← ↺ 💾 ↶ + 🗑️ 📋 ▾ ⏪ < > ⏩ VIEW ACCOUNT ...

* Customer ID:	<input type="text" value="C000000003"/>	Balance:	105,489.00
* Customer Status:	<input type="text" value="Active"/>	Prepayment Balance:	0.00
* Customer Class:	<input type="text" value="DEFAULT - Default"/>		

! GENERAL FINANCIAL BILLING SHIPPING PAYMENT METHODS CONTACTS SALESPERSONS ATTRIBUTES

ACCOUNT INFO

* Account Name:

ACCOUNT ADDRESS

VIEW ON MAP

PRIMARY CONTACT

Name:

Job Title:

Email:

Figure: Customer billing contact

Customers

C000000003 - Jevy Computers

← ↻ 📄 ↶ + 🗑️ 📄 ▾ ⌂ < > >| VIEW ACCOUNT ACTIONS ▾ INQUIRIES ▾ REPOF

* Customer ID: C000000003 - Jevy Computers 🔍
Customer Status: Active
* Customer Class: DEFAULT - Default 🔍 ✎
Balance: 105,489.00
Prepayment Balance: 0.00

🔔 GENERAL FINANCIAL **BILLING** SHIPPING PAYMENT METHODS CONTACTS SALESPERSONS ATTRIBUTES

BILL-TO ADDRESS

☐ Override

[VIEW ON MAP](#)

Address Line 1: 1000 Pennsylvania Ave
Address Line 2:
City: San Francisco
State: CA - CALIFORNIA
Postal Code: 94107-3479
Country: US - United States of America

BILL-TO INFO

☐ Override

Account Name: Jevy Computers
Attention: Mag Darrow
Business 1: +1 (777) 380-0089
Business 2:
Fax:
Email: info@jevy-comp.con ✉️
Web: ✎

PARENT INFO

Parent Account: 🔍 ✎

PRINT AND EMAIL SETTINGS

☐ Send Invoices by Email ☐ Print Invoices
☐ Send Dunning Letters by Email ☒ Print Dunning Letters
☐ Send Statements by Email ☐ Print Statements
Statement Type: Open Item ▾

DEFAULT PAYMENT METHOD

Default Payment Method: CHECK - Check Payment

Cash Account:

Card/Account Nbr.:

Payment Method Details

Description	Value
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Lesson Summary

In this lesson, you have learned how to update an existing customer record and find the record for update by using a non-key field. You have used one request for the update.

Lesson 2.2: Updating the Detail Lines of a Sales Order

Learning Objectives

In this lesson, you will learn how to update the detail lines of a document by using the contract-based REST API.

Figure: Sales order to be updated

Sales Orders

SO 000003 - Digitech Printers

NOTES

← ↻ ⏮ ⏭ ⏮ ⏭ ⏭ ⏭ REMOVE HOLD ...

* Order Type: **SO** * Customer: C000000008 - Digitech Printers Ordered Qty.: 6.00
Order Nbr.: **000003** Contact: Discount Total: 0.00
Status: On Hold Tax Total: 0.00
* Date: 10/28/2015 Order Total: 415.00
* Requested On: 10/28/2015 Description:
Customer Ord... **SO248-563-06**
External Refer...

DETAILS TAXES COMMISSIONS FINANCIAL SHIPPING ADDRESSES SHIPMENTS PAYMENTS TOTALS

↻ + ✎ ✕ ADD ITEMS ADD INVOICE ITEM AVAILABILITY |<| ☒ ⬆

		* Branch	* Inventory ID	Free Item	Warehouse	Line Description	* UOM	
>	🔍	MYSTORE	CONGRILL	<input type="checkbox"/>	MAIN	Char-Broil Classic 480	PIECE	
	🔍	MYSTORE	AALEGO500	<input type="checkbox"/>	MAIN	Lego 500 piece set	PIECE	
	🔍	MYSTORE	CONTABLE1	<input type="checkbox"/>	MAIN	Folding Picnic Table 6 Foot	PIECE	

Lesson Summary

In this lesson, you have learned how to delete and update the detail lines of a sales order document through the contract-based REST API. You have retrieved the sales order in one request, updated the detail lines of the sales order locally, and submitted the order to Acumatica ERP in another request. You have identified the detail lines for the update by the entity IDs of the lines. You have used the delete system field of the detail entity to remove the detail line.

Day 2

A woman with blonde hair in a ponytail, wearing glasses and a grey t-shirt with an American flag patch, is working at a metalworking machine. She is using a pair of pliers to work on a piece of metal. The machine has a "DANGER" warning label that reads "KEEP FINGERS CLEAR OF MACHINE WHILE IN MOTION". To the left of the machine is a black storage rack filled with various small metal parts. The background shows a factory setting with various equipment and materials.

Part 3: Execution of Actions

Lesson 3.1: Releasing an Invoice

Learning Objectives

In this lesson, you will learn how to handle long-running operations, such as the releasing of the invoice, by using the contract-based REST API.

Lesson Summary

In this lesson, you have learned how to handle long-running operations, such as the releasing of the invoice, by using the contract-based REST API. You have monitored the status of the long-running operation, and when the operation completed, you have retrieved the released invoice from Acumatica ERP.

You have also reviewed how other types of invoices can be processed through the contract-based REST API.

A photograph of two men in a construction setting. The man on the left has a beard and is wearing a green polo shirt with a 'Curran Young' logo and a white hard hat. He is pointing at a tablet held in his left hand. The man on the right is wearing a white shirt, a yellow safety vest with orange reflective stripes, and a white hard hat. He is looking down at the tablet. The background shows a construction site with scaffolding and rebar.

Part 4: Processing of Payments by Credit Cards

Lesson 4.1: Registering a Customer Credit Card

Learning Objectives

In this lesson, you will learn how to create a customer payment method in Acumatica ERP through the contractbased REST API.

Figure: Create a Sandbox Account link

A payment API that does
what you need it to do



API Reference

Get started in minutes with our flexible, secure, and easily integrated payment solution.

[VISIT THE API REFERENCE >](#)



Developer Guides

Taking care of your business is a lot easier with the right API.

[SEE OUR GUIDES >](#)



Hello World

Ready to take our API for a spin? Simply, create your account and go.

[CREATE A SANDBOX ACCOUNT >](#)

Figure: Sandbox account settings

Authorize.Net®

Welcome: TestFirstName TestLastName

FEEDBACK

CONTACT US

HELP

LOG OUT

HOME

TOOLS

REPORTS

TRANSACTION SEARCH

ACCOUNT

Settings

Billing Information

Statements

User Administration

User Profile

Digital Payment Solutions

Settings

Help

The following sections provide access to your payment gateway integration and Merchant Interface settings. For help with configuring these settings, click the Help link in the top right corner of each settings page.

Transaction Format Settings

Transaction Submission Settings

[Virtual Terminal](#)

[Payment Form](#)

[Upload Transaction File Format](#)

[Partial Authorization](#)

Transaction Response Settings

[Transaction Version](#)

[Response/Receipt URLs](#)

[Silent Post URL](#)

[Email Receipt](#)

[Receipt Page](#)

[Relay Response](#)

[Direct Response](#)

[FDS Customer Response](#)

Security Settings

Fraud Settings

[Enhanced Card Code Verification](#)

[Daily Velocity](#)

[Enhanced Address Verification Service](#)

[Cardholder Authentication](#)

General Security Settings

[Test Mode](#)

[File Upload Capabilities](#)

[Manage Public Client Key](#)

[Authorized Applications](#)

[Processor](#)

[API Credentials & Keys](#)

[Mobile Device Management](#)

Figure: API Credentials & Keys page

FEEDBACK

CONTACT US

HELP

LOG OUT

Welcome: TestFirstName TestLastName

Authorize.Net

HOME

TOOLS

REPORTS

TRANSACTION SEARCH

ACCOUNT

Settings

Billing Information

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User Administration

User Profile

Digital Payment Solutions

API Credentials & Keys

Help

Your API Login ID and Transaction Key are unique pieces of information specifically associated with your payment gateway account. However, the API login ID and Transaction Key are NOT used for logging into the Merchant Interface. These two values are only required when setting up an Internet connection between your e-commerce Web site and the payment gateway. They are used by the payment gateway to authenticate that you are authorized to submit Web site transactions.

A Signature Key is applicable if your solution uses our hosted payment form, or uses the Direct Post Method (DPM) to submit transactions. It is also used for authenticating transaction responses from our APIs, including but not limited to Relay Response and Silent Post.

IMPORTANT: The API Login ID, Transaction Key and Signature Key should not be shared with anyone. Be sure to store these values securely and change the Transaction Key regularly to further strengthen the security of your account.

For more information about the API Login ID, Transaction Key and Signature Key, please refer to the [Reference & User Guides](#) or contact your Web developer.

API Login ID:

API Login ID Last Obtained: 03/11/2020 08:54:10

Transaction Key Last Obtained: 03/11/2020 08:54:00

Create New Key(s)

* Required Fields

You may choose to disable the old one immediately by checking the [Disable Old Transaction Key Immediately](#) or [Disable Old Signature Key Immediately](#) option. If you do not immediately disable the old value, it will automatically expire in 24 hours.

Obtain: ☒ New Transaction Key ☐ New Signature Key

SubmitCancel

Figure: Customer Information Manager

Authorize.Net

FEEDBACKCONTACT USHELPLOG OUT

Welcome: TestFirstName TestLastName

HOMETOOLSREPORTSSEARCHACCOUNT

Virtual Terminal
Upload Transactions
Recurring Billing
Fraud Detection Suite
Customer Information Manager
Simple Checkout

Customer Profile

[Help](#)

Use this screen to create a new customer profile and, optionally, a payment and shipping profile. You can add one or more payment profiles and one or more shipping profiles for any customer profile.

Customer Profile Information

At least one of the following fields is required to create or edit a Customer Profile.

Customer ID: [What is this?](#)

Email:

Description:

Payment Profile Information

* Required if adding Payment Profile

Billing Information

Customer Type:

First Name: Last Name:

Company:

Address:

City:

State/Province: Zip/Postal Code:

Country:

Phone: Fax:

☐ Create a Shipping Profile from the information above

Payment Information

Payment Type ☒ Credit Card ☐ Bank Account

Accepted Methods: American Express, Discover, JCB, MasterCard, Visa

Card Number: *

Expiration Date: * (mmyy)

Validate Profile

☐ Perform credit card authorization before saving data.

Lesson Summary

In this lesson, you have learned how to create a customer payment method for a customer credit card. You have used the customer profile ID and the payment profile ID of the customer in Authorize.Net to create a customer payment method in Acumatica ERP. You have also reviewed how you can capture credit card payments.



Part 5: Attachment of Files and Notes

Lesson 5.1: Adding a Note to a Stock Item Record

Learning Objectives

In this lesson, you will learn how to add a note to a record through the contract-based REST API.

Lesson Summary

In this lesson, you have learned how to add notes to records in Acumatica ERP by using the contract-based REST API. To add a note, you have used the note system field of the entity.

You have also reviewed how to add notes to detail lines of documents.

Lesson 5.2: Attaching a File to a Stock Item Record

Learning Objectives

In this lesson, you will learn how to attach a file to a record through the contract-based REST API.

Figure: Attached file

Stock Items

AALEGO500 - Lego, 500 pieces

NOTES ACTIVITIES **FILES (1)**

* Inventory ID: AALEGO500 - Lego, 500 pieces Product Workgroup:

Item Status: Active

Description: Lego, 500 pieces

GENERAL PRICE/COST WAREHOUSE

ITEM DEFAULTS

* Item Class: STOCKITEM - S

Files

Select the file. Browse Upload

ADD LINK REMOVE LINK UPLOAD USING MOBILE APP

File name	Comment	Last Date	EditUrl
> T2MCRO.jpg		10/6/2021	Edit

Lesson Summary

In this lesson, you have learned how to attach files to records in Acumatica ERP by using the contract-based REST API.

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Thank you

Samuel-Olivier Lavigueur