

# **I330 Data Manipulation with REST API**

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Senior Technical Account Manager

#### **Timing and Agenda**

June 9, 2022 -10 AM -11 AM

June 11, 2022 -10 AM -11 AM

Day 1

Day 2

**Lesson 1.1: Creating a Shipment for Sales Orders** 

Lesson 3.1: Releasing an Invoice

**Lesson 1.2: Creating a Stock Item with Attributes** 

Lesson 4.1: Registering a Customer Credit Card

**Lesson 2.1: Updating a Customer Account** 

Lesson 5.1: Adding a Note to a Stock Item Record

Lesson 2.2: Updating the Detail Lines of a Sales

Lesson 5.2: Attaching a File to a Stock Item Record

Order



# Day 1





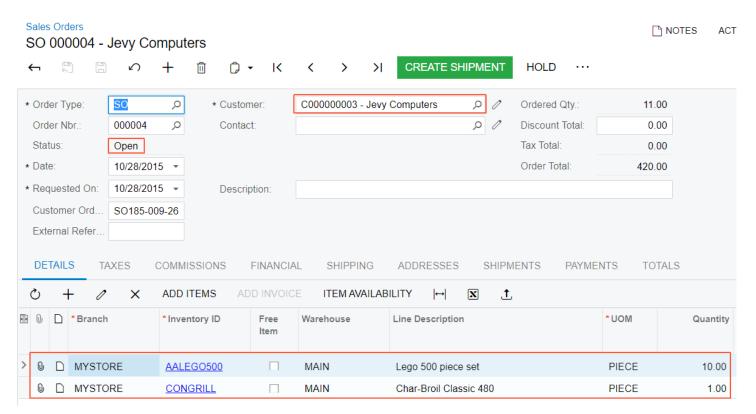
# **Lesson 1.1: Creating a Shipment for Sales Orders**

#### **Learning Objectives**

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



# Figure: One of two sales order to create a shipment for



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.



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.



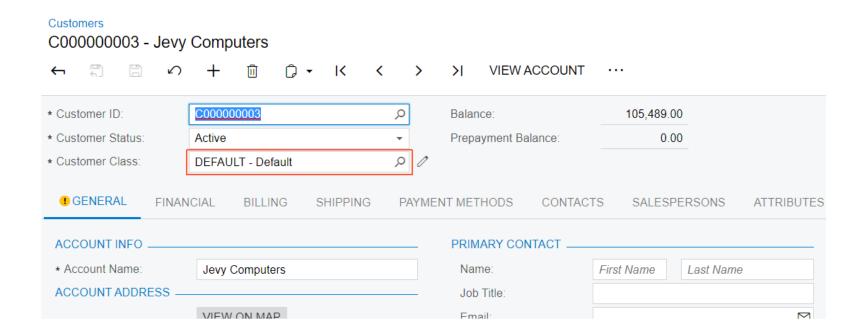


# **Lesson 2.1: Updating a Customer Account**

#### **Learning Objectives**

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

#### **Figure: Customer record**



# **Figure: Customer billing contact**

← 🖺 🖁	o + 🗓	Ď • K	< >	>1	VIEW	ACCOUNT	ACTI	ONS ▼	INQUIRIES •	REPOR
* Customer ID:	C000000003 - J	evy Computers	٥	Bala	ince:		10	5,489.00		
Customer Status:	Active			Prep	payment Ba	alance:		0.00		
* Customer Class:	DEFAULT - Defa	ault	20							
• GENERAL FIN	IANCIAL BILLIN	IG SHIPPIN	G PAYN	IENT ME	ETHODS	CONTACT	rs s	SALESPE	RSONS AT	TRIBUTES
BILL-TO ADDRESS _				PAR	RENT INFO	)				
	Override			Pa	arent Accou	unt:				0
	VIEW ON MAR			PRI	NT AND E	MAIL SETTING	GS			
Address Line 1:	1000 Pennsylv	ania Ave			Send Invo	ices by Email		Print	Invoices	
Address Line 2:					Send Dun	ning Letters by	y Email	✔ Print	Dunning Letters	;
City:	San Francisco				Send State	ements by Em	nail	Print	Statements	
State:	CA - CALIFORNIA		St	Statement Type:			Open Iter	n	-	
Postal Code:	94107-3479			DEF	AULT PAY	MENT METH	OD			
Country:	US - United St	ates of America		De	efault Payn	nent Method:	CHECK	- Check F	Payment	
BILL-TO INFO				Ca	ash Accour	nt:				
Override				Card/Account Nbr.:						
Account Name:	Jevy Compute	rs		P	ayment M	ethod Details	•			
Attention:	Mag Darrow			8	Description	on	Va	lue		
Business 1	+1 (777) 380-0	089								
Business 2										
Fax										
Email:	info@jevy-com	ıp.con								
Web:			[2]							

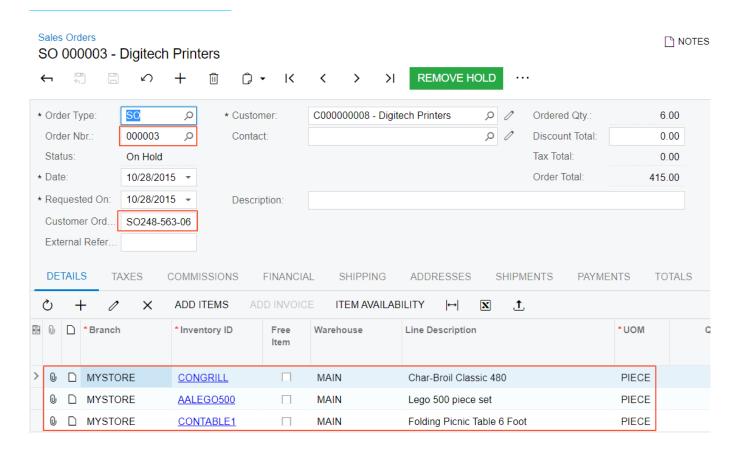
In this lesson, you have learned how to update an existing customer record and find the record for update by using a non-key field. You have used one request for the update.

# **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



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





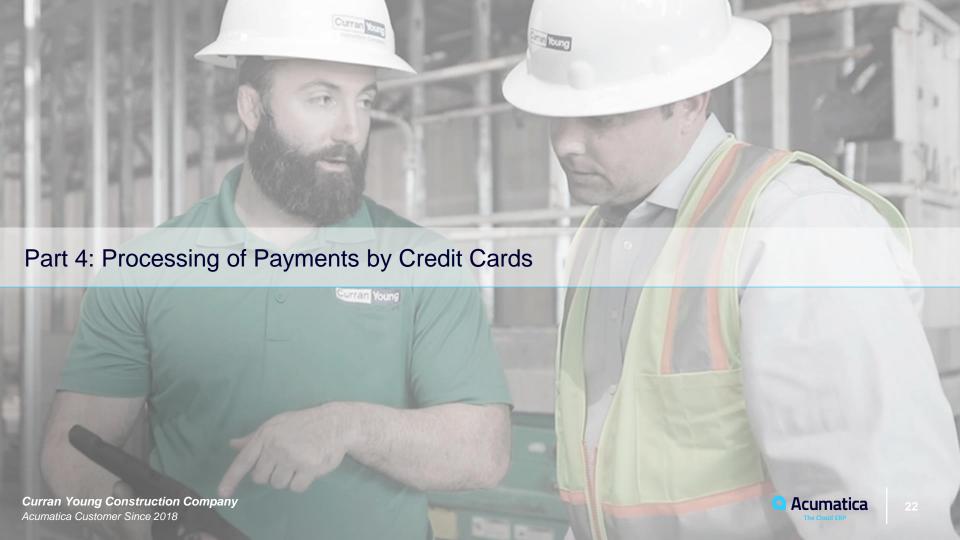
# **Lesson 3.1: Releasing an Invoice**

#### **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.

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.



# **Lesson 4.1: Registering a Customer Credit Card**

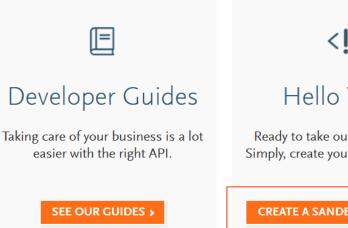
#### **Learning Objectives**

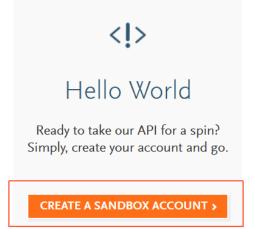
In this lesson, you will learn how to create a customer payment method in Acumatica ERP through the contractbased REST API.

# Figure: Create a Sandbox Account link

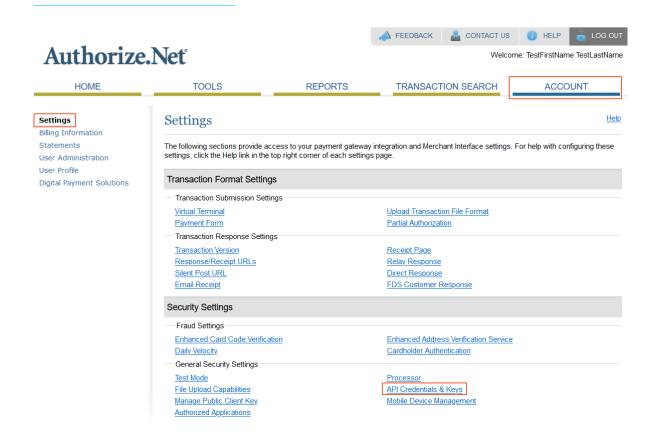
# A payment API that does what you need it to do





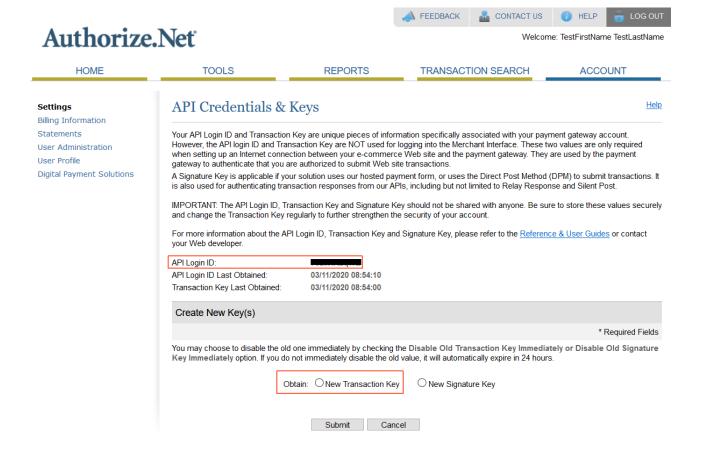


#### Figure: Sandbox account settings





#### Figure: API Credentials & Keys page



# **Figure: Customer Information Manager**

Authorize	e.Net	<i>♠</i>	FEEDBACK CONTACT US Welcon	HELP LOG OUT me: TestFirstName TestLastName					
HOME	TOOLS	REPORTS	SEARCH	ACCOUNT					
Virtual Terminal Upload Transactions Recurring Billing Fraud Detection Suite	Customer Profile  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								
Customer Information Manager Simple Checkout	At least one of the following fie  Customer ID: C000000003  Email: Description:	What is this?							
	Payment Profile Information	on	* R	Required if adding Payment Profile					
	Customer Type:  First Name:  Company:	Last	Name:						
	Address: City: State/Province::	Zip/Posta	I Code:						
	Country: Phone: Crea	te a Shipping Profile from the informat	Fax:						
	Payment Information  Payment Type   Crec	dit Card O Bank Account							
	Validate Profile	orm credit card authorization before sa	uving data.						



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.



# 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.

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.

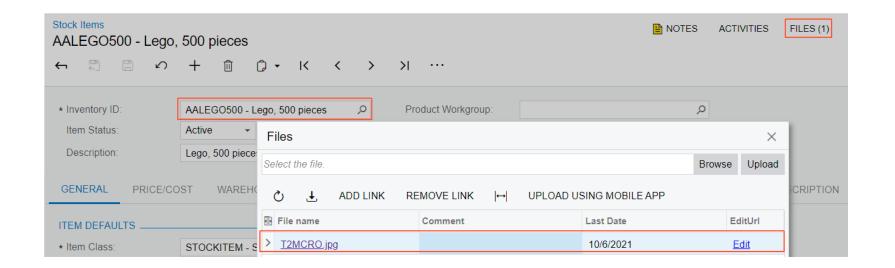
You have also reviewed how to add notes to detail lines of documents.

# 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



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

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