Integrating with Intacct Web Services

This 1-day (6 hour) course is designed for developers who use Intacct’s Web Services to build integrations using the Intacct API.

Class Details

**Audience:** Developers who use Intacct Web Services to create integrations to external applications.

**Prerequisite(s):** You will need to have the following experience:
- XML
- Internet programming language (PHP, C#, etc.)
- Database design principles

**Class Length:**
- Classroom: 1 day (6 hours)
- Virtual Classroom: Two days, 3-hours each day

**What you Need:** This is a hands-on course. Intacct will provide a sample environment for the activities. You will need a laptop (not a tablet) with the following configuration:
- OS: MAC, Windows, or Linux
- Browser for working in Intacct: Firefox
- Browser for Web Services tools: Chrome (recommended) or Internet Explorer
- Editor: Students should use the text editor with which they are most comfortable, such as UltraEdit, Notepad++, emacs, vi/vim, etc.

For our virtual classroom you will need a high-speed internet connection and a phone line.

**Cost:** $800

Course Objectives

At the end of this course, you should be able to:
- Define access points to the Intacct API and when to use object-specific or generic methods
- Make API requests using the Intacct API Test Tool
- Initiate external processes with triggers, smart events, and dashboards
- Structure internal requests and external code to protect Intacct credentials
- Write development patterns that reduce process time and promote successful integrations
- Use the Intacct API class library to reduce your production time
## Course Topics

### What is Intacct’s Web Services?
- Describe when to use Web Services
- Recognize XML required for API requests
- Define the parts of an XML request
- Set an endpoint and request a session

### The Intacct API Test Tool
- Download the API Test Tool
- Set header parameters in the test tool
- Structure request content
- Clean up request code
- Choose between object-specific and open methods
- Read response XML with full requests and line numbers

### Object Specific Methods
- Make get_list requests on standard objects
- Add filters and sorting to get_list requests
- Read a DTD for elements and attributes
- Create, update, and delete a record using an object-specific method

### Open/Generic Methods
- Determine when to use open methods
- Inspect companies to see object information and objects to see field information
- Read objects, read related objects, and read objects by query
- Read list views and custom reports to get pre-organized data
- Create, update, and delete records with open request methods
- Add transactional control

### Initiating API Processes
- Determine whether to use data initiated or user initiated API processes
- Determine when to use GET vs. POST
- Initiate processes based on a data change and on a user action

### Patterns for API Success
- Make efficient requests
- Handle looping without excessive round trips to Intacct
- Protect sensitive data, such as credentials, stored on your server
- Establish environment structures

### API Class Libraries (SDKs)
- Identify advantages of using API classes to handle Web Services requests
- Recognize models to create API classes in other languages

## Questions?

Contact Intacct Learning at [training@intacct.com](mailto:training@intacct.com), for questions.