

# Oracle® Cloud

## Using the QuickBooks Adapter with Oracle Integration 3



F58334-03  
April 2024



Oracle Cloud Using the QuickBooks Adapter with Oracle Integration 3,

F58334-03

Copyright © 2022, 2024, Oracle and/or its affiliates.

Primary Author: Oracle Corporation

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software, software documentation, data (as defined in the Federal Acquisition Regulation), or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs) and Oracle computer documentation or other Oracle data delivered to or accessed by U.S. Government end users are "commercial computer software," "commercial computer software documentation," or "limited rights data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, reproduction, duplication, release, display, disclosure, modification, preparation of derivative works, and/or adaptation of i) Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs), ii) Oracle computer documentation and/or iii) other Oracle data, is subject to the rights and limitations specified in the license contained in the applicable contract. The terms governing the U.S. Government's use of Oracle cloud services are defined by the applicable contract for such services. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle®, Java, MySQL, and NetSuite are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Inside are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Epyc, and the AMD logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

# Contents

## Preface

---

Audience	iv
Documentation Accessibility	iv
Diversity and Inclusion	iv
Related Resources	v
Conventions	v

## 1 Understand the QuickBooks Adapter

---

QuickBooks Adapter Capabilities	1-1
What Application Version Is Supported?	1-1
Workflow to Create and Add a QuickBooks Adapter Connection to an Integration	1-2

## 2 Create a QuickBooks Adapter Connection

---

Prerequisites for Creating a Connection	2-1
Create a Connection	2-2
Configure Connection Properties	2-4
Configure Connection Security	2-4
Configure the Endpoint Access Type	2-5
Test the Connection	2-5
Upload a Certificate to Connect with External Services	2-6

## 3 Add the QuickBooks Adapter Connection to an Integration

---

Basic Info Page	3-1
Invoke Action Page	3-1
Invoke Operation Page	3-2
Summary Page	3-2

# Preface

This guide describes how to configure this adapter as a connection in an integration in Oracle Integration.

**Note:**

The use of this adapter may differ depending on the features you have, or whether your instance was provisioned using Standard or Enterprise edition. These differences are noted throughout this guide.

**Topics:**

- [Audience](#)
- [Documentation Accessibility](#)
- [Diversity and Inclusion](#)
- [Related Resources](#)
- [Conventions](#)

## Audience

This guide is intended for developers who want to use this adapter in integrations in Oracle Integration.

## Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <https://www.oracle.com/corporate/accessibility/>.

**Access to Oracle Support**

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit <https://support.oracle.com/portal/> or visit [Oracle Accessibility Learning and Support](#) if you are hearing impaired.

## Diversity and Inclusion

Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our

initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we are working to remove insensitive terms from our products and documentation. We are also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

## Related Resources

See these Oracle resources:

- Oracle Cloud at <http://cloud.oracle.com>
- *Using Integrations in Oracle Integration 3*
- *Using the Oracle Mapper with Oracle Integration 3*
- Oracle Integration documentation on the Oracle Help Center.

## Conventions

The following text conventions are used in this document:

Convention	Meaning
<b>boldface</b>	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
<code>monospace</code>	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

# 1

## Understand the QuickBooks Adapter

Review the following conceptual topics to learn about the QuickBooks Adapter and how to use it as a connection in integrations in Oracle Integration. A typical workflow of adapter and integration tasks is also provided.

### Topics:

- [QuickBooks Adapter Capabilities](#)
- [What Application Version Is Supported?](#)
- [Workflow to Create and Add a QuickBooks Adapter Connection to an Integration](#)

## QuickBooks Adapter Capabilities

The QuickBooks Adapter enables you to create an integration with the QuickBooks application. You can configure the QuickBooks Adapter as an invoke connection in an integration in Oracle Integration.

The QuickBooks Adapter provides the following benefits:

- Supports connecting to private resources that are in your virtual cloud network (VCN) with a private endpoint. See [Connect to Private Resources in \*Provisioning and Administering Oracle Integration 3\*](#) and [Configure the Endpoint Access Type](#). This type of connection does not use the connectivity agent.
- Provides metadata caching support.
- Provides invoke (target) connection support for performing the following types of actions against the selected module and operation:
  - Create (create records in QuickBooks)
  - Update (update records in QuickBooks)
  - Query (get a record from QuickBooks)
  - Delete (delete records from QuickBooks)
- Supports QuickBooks APIs protected using OAuth 2.0 three-legged authentication (authorization code credentials).

The QuickBooks Adapter is one of many predefined adapters included with Oracle Integration.

## What Application Version Is Supported?

For information about which application version is supported by this adapter, see the [Connectivity Certification Matrix](#).

## Workflow to Create and Add a QuickBooks Adapter Connection to an Integration

You follow a very simple workflow to create a connection with an adapter and include the connection in an integration in Oracle Integration.

This table lists the workflow steps for both adapter tasks and overall integration tasks, and provides links to instructions for each step.

Step	Description	More Information
1	Access Oracle Integration.	Go to <a href="https://instance_URL/ic/home">https://instance_URL/ic/home</a>
2	Create the adapter connections for the applications you want to integrate. The connections can be reused in multiple integrations and are typically created by the administrator.	<a href="#">Create a QuickBooks Adapter Connection</a>
3	Create the integration. When you do this, you add trigger (source) and invoke (target) connections to the integration.	Create Integrations in <i>Using Integrations in Oracle Integration 3</i> and <a href="#">Add the QuickBooks Adapter Connection to an Integration</a>
4	Map data between the trigger connection data structure and the invoke connection data structure.	Map Data in <i>Using Integrations in Oracle Integration 3</i>
5	(Optional) Create lookups that map the different values used by those applications to identify the same type of object (such as gender codes or country codes).	Manage Lookups in <i>Using Integrations in Oracle Integration 3</i>
6	Activate the integration.	Activate Integrations in <i>Using Integrations in Oracle Integration 3</i>
7	Monitor the integration on the dashboard.	Monitor Integrations in <i>Using Integrations in Oracle Integration 3</i>
8	Track payload fields in messages during runtime.	Assign Business Identifiers for Tracking Fields in Messages and Manage Business Identifiers for Tracking Fields in Messages in <i>Using Integrations in Oracle Integration 3</i>
9	Manage errors at the integration level, connection level, or specific integration instance level.	Manage Errors in <i>Using Integrations in Oracle Integration 3</i>

# 2

## Create a QuickBooks Adapter Connection

A connection is based on an adapter. You define connections to the specific cloud applications that you want to integrate. The following topics describe how to define connections.

### Topics:

- [Prerequisites for Creating a Connection](#)
- [Create a Connection](#)
- [Upload a Certificate to Connect with External Services](#)

## Prerequisites for Creating a Connection

You must satisfy the following prerequisites to create a connection with the QuickBooks Adapter.

- [Create an Intuit Developer Account](#)
- [Create an Application](#)
- [Add a Redirect URL](#)
- [Add a Sandbox or Production Company](#)

### Create an Intuit Developer Account

You must create an Intuit developer account. See [Create an Intuit developer account](#).

### Create an Application

To generate the client ID and client secret, you must create an application using the QuickBooks Developer Dashboard.

1. Log in to your QuickBooks Developer account with the following URL:

```
https://developer.intuit.com/app/developer/homepage
```

2. Click **Dashboard**, then click **Create an app**.
3. Select **QuickBooks Online and Payments**.
4. Enter a name for your application and select the **com.intuit.quickbooks.accounting** checkbox under **Select a scope**.
5. Click **Create app**. The application is created.
6. On the Develop your app page, click **Keys & credentials** under **Development Settings**. The client ID and client secret for the sandbox environment appear.
7. Click **Keys & credentials** under **Production Settings** and perform the required steps. The client ID and client secret for the production environment appear.
8. Copy the client ID and client secret.

You'll need to enter these values on the Connections page when you configure security for your QuickBooks Adapter connection in Oracle Integration. See [Configure Connection Security](#).

#### Add a Redirect URL

1. Log in to your QuickBooks developer account.
2. Click **Dashboard**.
3. Select and open your application.
4. Click **Keys & credentials** under **Development Settings** to set your sandbox redirect URI or click **Keys & credentials** under **Production Settings** to set your production redirect URI.
5. Scroll down to the **Redirect URIs** section, and click **Add URI**.
6. Click **Save**.

#### Add a Sandbox or Production Company

You must have a sandbox or production company profile created in the QuickBooks application. See [Create and test with a sandbox company](#). You can go to [www.quickbooks.in](http://www.quickbooks.in) to create your production company profile.

You'll need to select the company name on the Connections page when you configure security for your QuickBooks Adapter connection in Oracle Integration. See [Configure Connection Security](#).

## Create a Connection

Before you can build an integration, you must create the connections to the applications with which you want to share data.

To create a connection in Oracle Integration:

1. In the navigation pane, click **Design**, then **Connections**.
2. Click **Create**.

#### Note:

You can also create a connection in the integration canvas. See [Define Inbound Triggers and Outbound Invokes](#).

3. In the Create connection panel, select the adapter to use for this connection. To find the adapter, scroll through the list, or enter a partial or full name in the **Search** field.
4. Enter the information that describes this connection.

Element	Description
<b>Name</b>	Enter a meaningful name to help others find your connection when they begin to create their own integrations.

Element	Description
<b>Identifier</b>	Automatically displays the name in capital letters that you entered in the <b>Name</b> field. If you modify the identifier name, don't include blank spaces (for example, SALES OPPORTUNITY).
<b>Role</b>	Select the role (direction) in which to use this connection (trigger, invoke, or both). Only the roles supported by the adapter are displayed for selection. When you select a role, only the connection properties and security policies appropriate to that role are displayed on the Connections page. If you select an adapter that supports both invoke and trigger, but select only one of those roles, you'll get an error when you try to drag the adapter into the section you didn't select. For example, assume you configure a connection for the Oracle Service Cloud (RightNow) Adapter as only an <b>invoke</b> . Dragging the adapter to a <b>trigger</b> section in the integration produces an error.
<b>Keywords</b>	Enter optional keywords (tags). You can search on the connection keywords on the Connections page.
<b>Description</b>	Enter an optional description of the connection.
<b>Share with other projects</b>	<b>Note:</b> This field only appears if you are creating a connection in a project. Select to make this connection publicly available in other projects. Connection sharing eliminates the need to create and maintain separate connections in different projects. When you configure an adapter connection in a different project, the <b>Use a shared connection</b> field is displayed at the top of the Connections page. If the connection you are configuring matches the same type and role as the publicly available connection, you can select that connection to reference (inherit) its resources. See Add and Share a Connection Across a Project.

5. Click **Create**.

Your connection is created. You're now ready to configure the connection properties, security policies, and (for some connections) access type.

## Configure Connection Properties

Enter connection information so your application can process requests.



### Note:

After you clone an integration, customize a prebuilt integration, or import an existing integration into Oracle Integration, you update the connection information according to the requirements of your integration environment. For custom fields or updated fields to appear in the mapper, you must refresh the endpoints in Oracle Integration. See *Refresh Endpoints for Integrations in Using Integrations in Oracle Integration 3*.

1. Go to the **Properties** section.
2. In the **QuickBooks Environment** field, select the environment. Your selection enables the QuickBooks Adapter to connect to the appropriate endpoint.
  - **Sandbox:** A self-contained, testing environment that imitates a QuickBooks production environment. The sandbox environment enables you to test and debug your QuickBooks APIs before running them in QuickBooks' live production environment.
  - **Production:** QuickBooks' live production environment for running your QuickBooks APIs.

## Configure Connection Security

Configure security for your QuickBooks Adapter connection by selecting the security policy and specifying the appropriate security details.

1. Go to the **Security** section.
2. In the **Client Id** field, enter the client ID that you obtained after performing the steps in the prerequisites section. See [Create an Application](#).
3. In the **Client Secret** field, enter the client secret that you obtained after performing the steps in the prerequisites section. See [Create an Application](#).
4. (Optional) In the **Scope** field, enter `com.intuit.quickbooks.accounting`. This is the only scope supported by the QuickBooks Adapter. You select it while creating an application in the QuickBooks application. See [Create an Application](#).

If you do not provide any value for the scope, `com.intuit.quickbooks.accounting` is added by default.

5. Click **Provide Consent** to verify the connection properties and get an access token.

The QuickBooks application page is displayed.

6. Select the company name that you specified in the QuickBooks application. See [Add a Sandbox or Production Company](#).
7. Once you see an access allowed message, you can test your connection.

## Configure the Endpoint Access Type

Configure access to your endpoint. Depending on the capabilities of the adapter you are configuring, options may appear to configure access to the public internet, to a private endpoint, or to an on-premises service hosted behind a fire wall.

- [Select the Endpoint Access Type](#)
- [Ensure Private Endpoint Configuration is Successful](#)

### Select the Endpoint Access Type

Select the option for accessing your endpoint.

Option	This Option Appears If Your Adapter Supports ...
<b>Public gateway</b>	Connections to endpoints using the public internet.
<b>Private endpoint</b>	Connections to endpoints using a private virtual cloud network (VCN). <b>Note:</b> To connect to private endpoints, you must complete prerequisite tasks in the Oracle Cloud Infrastructure Console. Failure to do so results in errors when testing the connection. See <a href="#">Connect to Private Resources in <i>Provisioning and Administering Oracle Integration 3</i></a> and <a href="#">Troubleshoot Private Endpoints in <i>Using Integrations in Oracle Integration 3</i></a> .

### Ensure Private Endpoint Configuration is Successful

- To connect to private endpoints, you must complete prerequisite tasks in the Oracle Cloud Infrastructure Console. Failure to do so results in errors when testing the connection. See [Connect to Private Resources in \*Provisioning and Administering Oracle Integration 3\*](#).
- When configuring an adapter on the Connections page to connect to endpoints using a private network, specify the fully-qualified domain name (FQDN) and *not* the IP address. If you enter an IP address, validation fails when you click **Test**.
- IPSec tunneling and FastConnect are not supported for use with private endpoints.

## Test the Connection

Test your connection to ensure that it's configured successfully.

1. In the page title bar, click **Test**. What happens next depends on whether your adapter connection uses a Web Services Description Language (WSDL) file. Only some adapter connections use WSDLs.

If Your Connection...	Then...
Doesn't use a WSDL	The test starts automatically and validates the inputs you provided for the connection.

If Your Connection...	Then...
Uses a WSDL	<p>A dialog prompts you to select the type of connection testing to perform:</p> <ul style="list-style-type: none"> <li>• <b>Validate and Test:</b> Performs a full validation of the WSDL, including processing of the imported schemas and WSDLs. Complete validation can take several minutes depending on the number of imported schemas and WSDLs. No requests are sent to the operations exposed in the WSDL.</li> <li>• <b>Test:</b> Connects to the WSDL URL and performs a syntax check on the WSDL. No requests are sent to the operations exposed in the WSDL.</li> </ul>

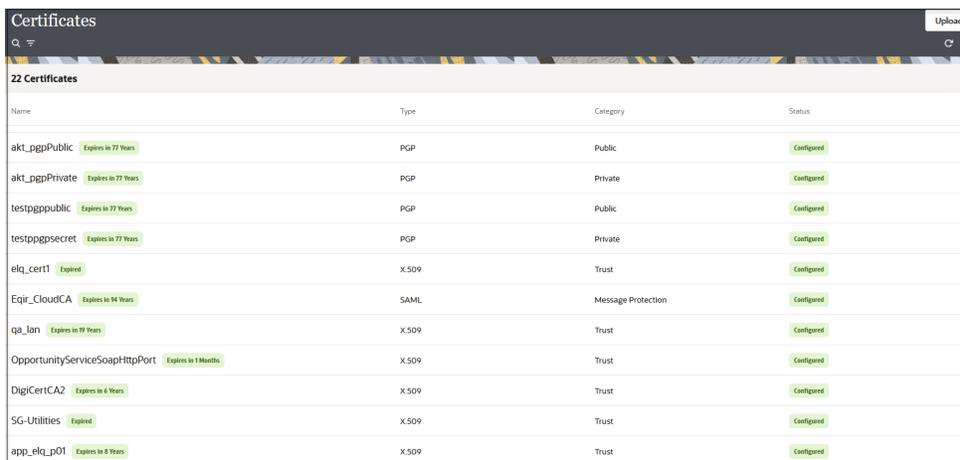
2. Wait for a message about the results of the connection test.
  - If the test was successful, then the connection is configured properly.
  - If the test failed, then edit the configuration details you entered. Check for typos and verify URLs and credentials. Continue to test until the connection is successful.
3. When complete, click **Save**.

## Upload a Certificate to Connect with External Services

Certificates allow Oracle Integration to connect with external services. If the external service/endpoint needs a specific certificate, request the certificate and then import it into Oracle Integration.

If you make an SSL connection in which the root certificate does not exist in Oracle Integration, an exception error is thrown. In that case, you must upload the appropriate certificate. A certificate enables Oracle Integration to connect with external services. If the external endpoint requires a specific certificate, request the certificate and then upload it into Oracle Integration.

1. Sign in to Oracle Integration.
2. In the navigation pane, click **Settings**, then **Certificates**. All certificates currently uploaded to the trust store are displayed on the Certificates page.
3. Click **Filter**  to filter by name, certificate expiration date, status, type, category, and installation method (user-installed or system-installed). Certificates installed by the system cannot be deleted.



Name	Type	Category	Status
akt_ppgPublic <small>Expires in 77 Years</small>	PGP	Public	Configured
akt_ppgPrivate <small>Expires in 77 Years</small>	PGP	Private	Configured
testppgpublic <small>Expires in 77 Years</small>	PGP	Public	Configured
testppgsecret <small>Expires in 77 Years</small>	PGP	Private	Configured
elq_cert1 <small>Expired</small>	X.509	Trust	Configured
Eqir_CloudCA <small>Expires in 94 Years</small>	SAML	Message Protection	Configured
qa_lan <small>Expires in 99 Years</small>	X.509	Trust	Configured
OpportunityServiceSoapHttpPort <small>Expires in 1 Months</small>	X.509	Trust	Configured
DigiCertCA2 <small>Expires in 8 Years</small>	X.509	Trust	Configured
SG-Utilities <small>Expired</small>	X.509	Trust	Configured
app_elq_p01 <small>Expires in 8 Years</small>	X.509	Trust	Configured

4. Click **Upload** at the top of the page.  
The Upload certificate panel is displayed.
5. Enter an alias name and optional description.
6. In the **Type** field, select the certificate type. Each certificate type enables Oracle Integration to connect with external services.
  - [Digital Signature](#)
  - [X.509 \(SSL transport\)](#)
  - [SAML \(Authentication & Authorization\)](#)
  - [PGP \(Encryption & Decryption\)](#)
  - [Signing key](#)

### Digital Signature

The digital signature security type is typically used with adapters created with the Rapid Adapter Builder. See [Learn About the Rapid Adapter Builder in Oracle Integration in \*Using the Rapid Adapter Builder with Oracle Integration 3\*](#).

1. Click **Browse** to select the digital certificate. The certificate must be an X509Certificate. This certificate provides inbound RSA signature validation. See [Implement Digital Signature Validation \(RSA\) in \*Using the Rapid Adapter Builder with Oracle Integration 3\*](#).
2. Click **Upload**.

### X.509 (SSL transport)

1. Select a certificate category.
  - a. **Trust**: Use this option to upload a trust certificate.
    - i. Click **Browse**, then select the trust file (for example, `.cer` or `.crt`) to upload.
  - b. **Identity**: Use this option to upload a certificate for two-way SSL communication.
    - i. Click **Browse**, then select the keystore file (`.jks`) to upload.
    - ii. Enter the comma-separated list of passwords corresponding to key aliases.

 **Note:**

When an identity certificate file (`.jks`) contains more than one private key, all the private keys must have the same password. If the private keys are protected with different passwords, the private keys cannot be extracted from the keystore.

- iii. Enter the password of the keystore being imported.
  - c. Click **Upload**.

### SAML (Authentication & Authorization)

1. Note that **Message Protection** is automatically selected as the only available certificate category and cannot be deselected. Use this option to upload a keystore certificate with

SAML token support. Create, read, update, and delete (CRUD) operations are supported with this type of certificate.

2. Click **Browse**, then select the certificate file (.cer or .crt) to upload.
3. Click **Upload**.

### PGP (Encryption & Decryption)

1. Select a certificate category. Pretty Good Privacy (PGP) provides cryptographic privacy and authentication for communication. PGP is used for signing, encrypting, and decrypting files. You can select the private key to use for encryption or decryption when configuring the stage file action.
  - a. **Private:** Uses a private key of the target location to decrypt the file.
    - i. Click **Browse**, then select the PGP file to upload.
    - ii. Enter the PGP private key password.
  - b. **Public:** Uses a public key of the target location to encrypt the file.
    - i. Click **Browse**, then select the PGP file to upload.
    - ii. In the **ASCII-Armor Encryption Format** field, select **Yes** or **No**.
      - **Yes** shows the format of the encrypted message in ASCII armor. ASCII armor is a binary-to-textual encoding converter. ASCII armor formats encrypted messaging in ASCII. This enables messages to be sent in a standard messaging format. This selection impacts the visibility of message content.
      - **No** causes the message to be sent in binary format.
    - iii. From the **Cipher Algorithm** list, select the algorithm to use. Symmetric-key algorithms for cryptography use the same cryptographic keys for both encryption of plain text and decryption of cipher text. The following supported cipher algorithms are FIPS-compliant:
      - AES128
      - AES192
      - AES256
      - TDES
  - c. Click **Upload**.

### Signing key

A signing key is a secret key used to establish trust between applications. Signing keys are used to sign ID tokens, access tokens, SAML assertions, and more. Using a private signing key, the token is digitally signed and the server verifies the authenticity of the token by using a public signing key. You must upload a signing key to use the OAuth Client Credentials using JWT Client Assertion and OAuth using JWT User Assertion security policies in REST Adapter invoke connections. Only PKCS1- and PKCS8-formatted files are supported.

1. Select **Public** or **Private**.
2. Click **Browse** to upload a key file.

If you selected **Private**, and the private key is encrypted, a field for entering the private signing key password is displayed after key upload is complete.

3. Enter the private signing key password. If the private signing key is not encrypted, you are not required to enter a password.
4. Click **Upload**.

# 3

## Add the QuickBooks Adapter Connection to an Integration

When you drag the QuickBooks Adapter into the invoke area of an integration, the Adapter Endpoint Configuration Wizard is invoked. This wizard guides you through configuration of the QuickBooks Adapter endpoint properties.

The following sections describe the wizard pages that guide you through configuration of the QuickBooks Adapter as an invoke in an integration. You cannot configure the QuickBooks Adapter as a trigger in an integration.

### Topics:

- [Basic Info Page](#)
- [Invoke Action Page](#)
- [Invoke Operation Page](#)
- [Summary Page](#)

## Basic Info Page

You can enter a name and description on the Basic Info page of each adapter in your integration.

Element	Description
<b>What do you want to call your endpoint?</b>	Provide a meaningful name so that others can understand the responsibilities of this connection. You can include English alphabetic characters, numbers, underscores, and hyphens in the name. You can't include the following characters: <ul style="list-style-type: none"><li>• No blank spaces (for example, My Inbound Connection)</li><li>• No special characters (for example, #;83&amp; or righ(t)now4) except underscores and hyphens</li><li>• No multibyte characters</li></ul>
<b>What does this endpoint do?</b>	Enter an optional description of the connection's responsibilities. For example:  <code>This connection receives an inbound request to synchronize account information with the cloud application.</code>

## Invoke Action Page

Select the type of action to perform.

Element	Description
<b>Select an action type</b>	<ul style="list-style-type: none"> <li>• <b>Query information:</b> Retrieves information from the QuickBooks application corresponding to the selected module and operation.</li> <li>• <b>Create, update, or delete information:</b> Creates a new record, updates an existing record, or deletes a record in/from a QuickBooks application. For example, <b>Create Accounts, Create Purchase Order, Update Invoice, and Delete Bill.</b></li> </ul>

## Invoke Operation Page

Select the module and operation to perform in the QuickBooks application.

Element	Description
<b>Select operation type</b> (Displayed if the <b>Create, update, or delete information</b> option is selected on the Action page.)	Displays the following options: <b>Create, Delete, and Update.</b>
<b>Select module</b>	Select a module, such as <b>Invoice, Account, Customer, Sales Receipt,</b> and so on.
<b>Filter by module name</b>	Type a keyword or the initial letters of the module name to filter the display of names in the list.
<b>Select operation</b>	Select an operation name, such as <b>Get Payment.</b>
<b>Filter by operation name</b>	Type a keyword or the initial letters of the operation name to filter the display of names in the list.

## Summary Page

You can review the specified adapter configuration values on the Summary page.

Element	Description
<b>Summary</b>	<p>Displays a summary of the configuration values you defined on previous pages of the wizard.</p> <p>The information that is displayed can vary by adapter. For some adapters, the selected business objects and operation name are displayed. For adapters for which a generated XSD file is provided, click the XSD link to view a read-only version of the file.</p> <p>To return to a previous page to update any values, click the appropriate tab in the left panel or click <b>Go back.</b></p> <p>To cancel your configuration details, click <b>Cancel.</b></p>