



2ndSite Integration Guide

Draft Version 1.11
January 30, 2006

Table of Contents

1	Introduction	3
1.1	Overview	3
1.2	Sections.....	3
1.3	Webservice Location.....	3
1.4	Setup.....	3
2	System Request	4
2.1	Form Post.....	4
2.2	Base Structure	4
2.3	Base Elements.....	4
3	System Response.....	5
3.1	Overview	5
3.2	Base Structure	5
3.3	Base Elements.....	5
4	Client Add	6
4.1	Overview	6
4.2	Client Add Structure	6
4.3	Client Add Elements	6
4.4	Client Add XML Example	8
4.5	Client Add Response Structure	8
4.6	Client Add Response Elements	9
5	Client Modify	10
5.1	Overview	10
5.2	Client Modify Structure	10
5.3	Client Modify Elements.....	10
5.4	Client Modify XML Example	12
5.5	Client Modify Response Structure	12
5.6	Client Modify Response Elements.....	13
6	Add Invoice	14
6.1	Overview	14
6.2	Invoice Add Structure	14
6.3	Invoice Add Elements.....	14
6.4	Invoice Add XML Example	15
6.5	Invoice Add Response Structure	15
6.6	Invoice Add Response Elements.....	15
7	Invoice Inquiry	15
7.1	Overview	15
7.2	Invoice Inquiry Structure.....	15
7.3	Invoice Inquiry Elements	15
7.4	Invoice Inquiry XML Example.....	15
7.5	Invoice Inquiry Response Structure.....	15
7.6	Invoice Inquiry Response Elements	15

1 Introduction

1.1 Overview

This guide provides all of the details necessary to integrate with the 2ndSite service. The 2ndSite integration accepts XML documents to add and modify client records and add invoice records.

1.2 Sections

There is a chapter for each record type provided in the 2ndSite integration, within each chapter is a section to help explain the XML required document. These sections are:

Base Structure:

This section gives an overview of the XML document structure and lists all of the parent nodes of the XML record

Base Elements:

This section details each element in the XML document and provides further details where required. The Type column indicates the expected type of record as well as the maximum length in brackets where applicable.

1.3 Webservice Location

The 2ndSite integration webservice is located at:

<https://www.secondsite.biz/XXXXXXXXXXXX> *

* *contact 2ndSite support (support@secondsite.biz) for this URL*

1.4 Setup

To enable your 2ndSite system to process your requests, you must contact 2ndSite support (support@secondsite.biz) to request an integration enabled account and they will provide you with a valid system name, and password to send with your requests. You must also provide them with the IP address you intend to use for your server that will be sending your XML requests.

2 System Request

2.1 Form Post

All XML documents should be set in a form post to the form variable: “**XMLPost**”.

2.2 Base Structure

Each XML document should begin with the following structure to identify the system, IP address, username and password.

```

<SSTransaction>
(System Identification)
  <SSAuth>
  (Authorization username and password)
  </SSAuth>
  [2ndSite request details]
</SSTransaction>

```

2.3 Base Elements

Name	Description	Parent Node	Type	Required
System Name	Unique name assigned to your 2ndSite system	SSTransaction	String	Yes
IPAddress	IP address for the server that will be sending your XML requests.	SSTransaction	String	Yes
Admin	2ndSite Administrator username	SSAuth	String	Yes
Pass	2ndSite Administrator password	SSAuth	String	Yes

3 System Response

3.1 Overview

All XML requests to 2ndSite will generate a system response with Result and ResponseMessage fields indicating the success of the XML request. A result of 0 indicates a successful request, a result of 1 indicates an error which will always include a message in the ResponseMessage field. The Result and ResponseMessage elements form part specific request's node when the request is successful.

3.2 Base Structure

```
<SSResponse>
  <SSResponseData>
    (System identification and response data)
  </SSResponseData>
</SSResponse>
```

3.3 Base Elements

Name	Description	Parent Node	Type	Required
System Name	Unique name assigned to your 2ndSite system	SSResponseData	String	Yes
IPAddress	IP address for the server that will be sending your XML requests.	SSResponseData	String	Yes
Result	2ndSite result code 0 – indicates success 1 – indicates error	SSResponseData, when an error occurs, otherwise a child of the specific request response, see details on each request below	String	Yes
ResponseMessage	2ndSite response message	SSResponseData, when an error occurs, otherwise a child of the specific request response, see details on each request below	String	Yes

4 Client Add

4.1 Overview

The add client routine is used to insert client records into the 2ndSite system.

4.2 Client Add Structure

```

<ClientTrans>
  <ClientAdd>
    <Client>
      (Client Details)
    </Client>
  </ClientAdd>
</ClientTrans>

```

4.3 Client Add Elements

Name	Description	Parent Node	Type	Required
Username	Client username	Client	String (50)	Yes
Password	Client password – if left blank, the username will be used as the password.	Client	String (50)	No
Orgname	Client organization name	Client	String (50)	No
FirstName	Client first name	Client	String (50)	No
LastName	Client last name	Client	String (50)	No
BusPhone	Client business phone number	Client	String (25)	No
HomePhone	Client home phone number	Client	String (25)	No
Fax	Client fax number	Client	String (25)	No
MobPhone	Client mobile phone number	Client	String (25)	No
Address1	Client address line 1	Client	String (50)	No
Address2	Client address line 2	Client	String (255)	No
City	Client city name	Client	String (50)	No

Name	Description	Parent Node	Type	Required
Province	Client province or state	Client	String (50)	No
Postal Code	Client Postal code or zip code	Client	String (13)	No
Country	Client country name	Client	String (50)	No
sAddress1	Client secondary / shipping address line 1	Client	String (50)	No
sAddress2	Client secondary / shipping address line 2	Client	String (255)	No
sCity	Client secondary / shipping city name	Client	String (50)	No
sProvince	Client secondary / shipping province or state	Client	String (50)	No
sPostal Code	Client secondary / shipping Postal code or zip code	Client	String (13)	No
sCountry	Client secondary / shipping country name	Client	String (50)	No

4.4 Client Add XML Example

```

<?xml version="1.0"?>
<SSTransaction>
  <SystemName>TestSystem</SystemName>
  <IPAddress>55.20.20.35</IPAddress>
  <SSAuth>
    <Admin>AdminName</Admin>
    <Pass>AdminPass</Pass>
  </SSAuth>
  <ClientTrans>
    <ClientAdd>
      <Client>
        <Username>client13</Username>
        <Password>clientpass13</Password>
        <Orgname>organization13</Orgname>
        <FirstName>John</FirstName>
        <LastName>Smith</LastName>
        <EmailAddress>client13@hotmail.com</EmailAddress>
        <BusPhone>123-bus</BusPhone>
        <HomePhone>123-home</HomePhone>
        <Fax>123-fax</Fax>
        <MobPhone>123-mobile</MobPhone>
        <Address1>st1</Address1>
        <Address2>st2</Address2>
        <City>city</City>
        <Province>AL</Province>
        <PostalCode>zip</PostalCode>
        <Country>Canada</Country>
        <sAddress1>secs1</sAddress1>
        <sAddress2>ses2</sAddress2>
        <sCity>seccity</sCity>
        <sProvince>AK</sProvince>
        <sPostalCode>seczip</sPostalCode>
        <sCountry>Canada</sCountry>
      </Client>
    </ClientAdd>
  </ClientTrans>
</SSTransaction>

```

Figure 1 Client Add XML Example

4.5 Client Add Response Structure

```

<ClientTransResponse>
  <ClientAddResponse>
    (Result and Message details)
    <Client>
      (Client Details)
    </Client>
  </ClientAddResponse>
</ClientTransResponse>

```

4.6 Client Add Response Elements

Name	Description	Parent Node	Type	Required
Result	2ndSite result code 0 – indicates success 1 – indicates error	ClientAddResponse	String	Yes
ResponseMessage	2ndSite add client response message, examples: - “New Client Added”	ClientAddResponse	String	Yes
Client Details	All client elements included in the request.	Client	String	No

5 Client Modify

5.1 Overview

The modify client routine is used to update client records in the 2ndSite system. This routine will overwrite all client information with the information submitted in the document. The client is keyed off of the Username field.

5.2 Client Modify Structure

```
<ClientTrans>
  <ClientModify>
    <Client>
      (Client Details)
    </Client>
  </ClientAdd>
</ClientTrans>
```

5.3 Client Modify Elements

Name	Description	Parent Node	Type	Required
Username	Client username	Client	String (50)	Yes
Password	Client password – if left blank, the username will be used as the password.	Client	String (50)	No
Orgname	Client organization name	Client	String (50)	No
FirstName	Client first name	Client	String (50)	No
LastName	Client last name	Client	String (50)	No
BusPhone	Client business phone number	Client	String (25)	No
HomePhone	Client home phone number	Client	String (25)	No
Fax	Client fax number	Client	String (25)	No
MobPhone	Client mobile phone number	Client	String (25)	No
Address1	Client address line 1	Client	String (50)	No
Address2	Client address line 2	Client	String (255)	No

Name	Description	Parent Node	Type	Required
City	Client city name	Client	String (50)	No
Province	Client province or state	Client	String (50)	No
Postal Code	Client Postal code or zip code	Client	String (13)	No
Country	Client country name	Client	String (50)	No
sAddress1	Client secondary / shipping address line 1	Client	String (50)	No
sAddress2	Client secondary / shipping address line 2	Client	String (255)	No
sCity	Client secondary / shipping city name	Client	String (50)	No
sProvince	Client secondary / shipping province or state	Client	String (50)	No
sPostal Code	Client secondary / shipping Postal code or zip code	Client	String (13)	No
sCountry	Client secondary / shipping country name	Client	String (50)	No

5.4 Client Modify XML Example

```

<?xml version="1.0"?>
<SSTransaction>
  <SystemName>TestSystem</SystemName>
  <IPAddress>55.20.20.35</IPAddress>
  <SSAuth>
    <Admin>AdminName</Admin>
    <Pass>AdminPass</Pass>
  </SSAuth>
  <ClientTrans>
    <ClientModify>
      <Client>
        <Username>client13</Username>
        <Password>clientpass13</Password>
        <Orgname>organization13</Orgname>
        <FirstName>John</FirstName>
        <LastName>Smith</LastName>
        <EmailAddress>client13@hotmail.com</EmailAddress>
        <BusPhone>123-bus</BusPhone>
        <HomePhone>123-home</HomePhone>
        <Fax>123-fax</Fax>
        <MobPhone>123-mobile</MobPhone>
        <Address1>st1</Address1>
        <Address2>st2</Address2>
        <City>city</City>
        <Province>AL</Province>
        <PostalCode>zip</PostalCode>
        <Country>Canada</Country>
        <sAddress1>secs1</sAddress1>
        <sAddress2>ses2</sAddress2>
        <sCity>seccity</sCity>
        <sProvince>AK</sProvince>
        <sPostalCode>seczip</sPostalCode>
        <sCountry>Canada</sCountry>
      </Client>
    </ClientAdd>
  </ClientTrans>
</SSTransaction>

```

Figure 2 Sample Client Add XML

5.5 Client Modify Response Structure

```

<ClientTransResponse>
  <ClientModifyResponse>
    (Result and Message details)
    <Client>
      (Client Details)
    </Client>
  </ClientModifyResponse>
</ClientTransResponse>

```

5.6 Client Modify Response Elements

Name	Description	Parent Node	Type	Required
Result	2ndSite result code 0 – indicates success 1 – indicates error	ClientModifyResponse	String	Yes
ResponseMessage	2ndSite modify client response message, examples: - “Client Modified”	ClientModifyResponse	String	Yes
Client Details	All client elements included in the request.	Client	n/a	n/a

6 Add Invoice

6.1 Overview

The add invoice routine is used to add a new invoice to 2ndSite. The invoice can either reference an existing client with the username, or alternatively automatically add the client if the client does not already exist in the 2ndSite system. If the client is being automatically added, all of the information in the add client routine can be included in the add invoice routine and will form the new client. The invoice add record can contain multiple item detail records. There is a maximum of ten item records allowed. The 2ndSite integration service will produce an invoice response that contains the submitted invoice details as well as a direct link string and 2ndSite invoice number.

6.2 Invoice Add Structure

```

<InvoiceTrans>
  <InvoiceAdd>
    <Invoice>
      (Invoice Details)
        <Address>
          (Client address details)
        </Address>
        <Item>
          (Item 1 details)
        </Item>
        <Item>
          (Item 2 details)
        </Item>
        <Item>
          (Item ... details)
        </Item>
      </Invoice>
    </InvoiceAdd>
  </InvoiceTrans>

```

6.3 Invoice Add Elements

Name	Description	Parent Node	Type	Required
Username	Client username	Client	String (50)	Yes
EmailAddress	Client email address	Client	String (100)	No
Orgname	Client organization name	Client	String (50)	No
FirstName	Client first name	Client	String (50)	No

Name	Description	Parent Node	Type	Required
LastName	Client last name	Client	String (50)	No
Address1	Client address line 1	Address	String (50)	No
Address2	Client address line 2	Address	String (255)	No
City	Client city name	Address	String (50)	No
Province	Client province or state	Address	String (50)	No
PostalCode	Client Postal code or zip code	Address	String (13)	No
Country	Client country name	Address	String (50)	No
Date	Invoice date, defaults to current date if left blank	Invoice	Date format (YYY-MM-DD)	Yes
PONumber	Purchase Order Number	Invoice	String (25)	No
Status	Status, possible values are: - pending (default) - sent - paid	Invoice	String (10)	No
InvoiceTotal	Total amount of invoice, in system default currency (must equal the sum of the item amounts)	Invoice	Float	No
Paid	Total amount paid on the invoice	Invoice	Float	No
PaymentDate	Date the payment was made	Invoice	Date format (YYY-MM-DD)	No
SendInvoice	Flag to indicate if client should be notified upon insert of invoice, possible values: - 0 (default) - 1	Invoice	Boolean	No
ItemName	Item name on the invoice	Item	String (20)	No
ItemDesc	Item description on the invoice	Item	String	No
ItemCost	Unit cost of item	Item	Float	No
ItemQty	Quantity of item	Item	Float	No

Name	Description	Parent Node	Type	Required
Tax1Name	Tax 1 name	Item	String (6)	No
Tax1	Tax 1 value (in percentages)	Item	Float	No
Tax2Name	Tax 2 name	Item	String (6)	No
Tax2	Tax 2 value (in percentages)	Item	Float	No
ItemAmount	Item amount (must equal the item cost * quantity)	Item	Float	No

6.4 Invoice Add XML Example

```
<?xml version="1.0"?>
<SSTransaction>
  <SystemName>TestSystem</SystemName>
  <IPAddress>55.20.20.35</IPAddress>
  <SSAuth>
    <Admin>AdminName</Admin>
    <Pass>AdminPass</Pass>
  </SSAuth>
  <InvoiceTrans>
    <InvoiceAdd>
      <Invoice>
        <Username>client13</Username>
        <EmailAddress>levinewclient4@secondsite.biz</EmailAddress>
        <Orgname>Client 13 Inc.</Orgname>
        <FirstName>Clientfirst</FirstName>
        <LastName>Clientlast</LastName>
        <Address>
          <Address1>123 Avenue Rd.</Address1>
          <Address2>Suite 30</Address2>
          <City>Toronto</City>
          <Province>AL</Province>
          <PostalCode>M4N 2X6</PostalCode>
          <Country>Canada</Country>
        </Address>
        <Date>2005-05-05</Date>
        <PONumber>ponum</PONumber>
        <Status>pending</Status>
        <InvoiceTotal>126.5</InvoiceTotal>
        <Paid>0</Paid>
        <SendInvoice>0</SendInvoice>
        <Item>
          <ItemName>itemname1</ItemName>
          <ItemDesc>description1</ItemDesc>
          <ItemCost>30</ItemCost>
          <ItemQty>1</ItemQty>
          <Tax1Name>TAX</Tax1Name>
          <Tax1>10</Tax1>
          <Tax2Name>TAX2</Tax2Name>
          <Tax2>5</Tax2>
          <ItemAmount>30</ItemAmount>
        </Item>
        <Item>
          <ItemName>itemname2</ItemName>
          <ItemDesc>description2</ItemDesc>
          <ItemCost>40</ItemCost>
          <ItemQty>2</ItemQty>
          <Tax1Name>TAX</Tax1Name>
          <Tax1>10</Tax1>
          <Tax2Name>TAX2</Tax2Name>
          <Tax2>5</Tax2>
          <ItemAmount>80</ItemAmount>
        </Item>
      </Invoice>
    </InvoiceAdd>
  </InvoiceTrans>
</SSTransaction>
```

Figure 3 Invoice Add Example

6.5 Invoice Add Response Structure

```

<InvoiceTransResponse>
  <InvoiceAddResponse>
    (Result and Message details)
    <Invoice>
      (Invoice Details)
    </Client>
  </InvoiceAddResponse>
</InvoiceTransResponse>
  
```

6.6 Invoice Add Response Elements

Name	Description	Parent Node	Type	Required
Result	2ndSite result code 0 – indicates success 1 – indicates error	InvoiceAddResponse	String	Yes
ResponseMessage	2ndSite add invoice response message, examples: - “Invoice added” - “Invoice emailed to test@test.com ” - “Client added”	InvoiceAddResponse	String	Yes
Invoice Details	All invoice elements included in the request.	Invoice	n/a	n/a
DirectLink	A direct link string that can be used to view the invoice by the client	Invoice	String	Yes
InvoiceNumber	The 2ndSite assigned invoice number used to identify the invoice	Invoice	Integer	Yes

7 Invoice Inquiry

7.1 Overview

The invoice inquiry routine is used to check the status and payment information of an invoice in 2ndSite. The invoice inquiry record must contain a valid and active invoice number. The 2ndSite integration service will produce an invoice inquiry response that contains the invoice number, status, paid amount, paid date and any payment details available.

7.2 Invoice Inquiry Structure

```

<InvoiceTrans>
  <InvoiceInquiry>
    <Invoice>
      </Invoice>
    </InvoiceInquiry>
  </InvoiceTrans>

```

7.3 Invoice Inquiry Elements

Name	Description	Parent Node	Type	Required
InvoiceNumber	Invoice number to obtain information on.	Invoice	Integer	Yes

7.4 Invoice Inquiry XML Example

```
<?xml version="1.0"?>
<SSTransaction>
  <SystemName>TestSystem</SystemName>
  <IPAddress>55.20.20.35</IPAddress>
  <SSAuth>
    <Admin>AdminName</Admin>
    <Pass>AdminPass</Pass>
  </SSAuth>
  <InvoiceTrans>
    <InvoiceInquiry>
      <Invoice>
        <InvoiceNumber>1</InvoiceNumber>
      </Invoice>
    </InvoiceInquiry>
  </InvoiceTrans>
</SSTransaction>
```

Figure 4 Invoice Inquiry Example

7.5 Invoice Inquiry Response Structure

```
<InvoiceTransResponse>
  <InvoiceAddResponse>
    (Result and Message details)
    <Invoice>
      (Invoice Details)
      <Payment>
        (Payment 1 Details)
      </Payment>
      <Payment>
        (Payment 2 Details)
      </Payment>
      <Payment>
        (Payment ... Details)
      </Payment>
    </Invoice>
  </InvoiceAddResponse>
</InvoiceTransResponse>
```

7.6 Invoice Inquiry Response Elements

Name	Description	Parent Node	Type	Required
Result	2ndSite result code 0 – indicates success 1 – indicates error	InvoiceAddResponse	String	Yes
ResponseMessage	2ndSite add invoice response message, examples: - “Invoice Inquiry Successful”	InvoiceAddResponse	String	Yes
Invoice Details	All invoice elements included in the request.	Invoice	n/a	n/a
InvoiceNumber	The 2ndSite assigned invoice number used to identify the invoice	Invoice	Integer	Yes
Status	Status, possible values are: - pending - sent - viewed - disputed - paid - auto-paid - retry - failed	Invoice	String	Yes
InvoiceTotal	The total amount of the invoice	Invoice	Float	Yes
DatePaid	The date the invoice was paid if applicable, it will return 0000-00-00 if the invoice has not been paid.	Invoice	Date format (YYYY-MM-DD)	Yes
PaymentDate	The date of the payment.	Payment	Date format (YYYY-MM-DD)	No
PaymentAmount	The amount of the payment.	Payment	Float	No

Name	Description	Parent Node	Type	Required
PaymentType	The type of payment, possible values are: <ul style="list-style-type: none"> - Cash - Check - VISA - MASTERCARD - DISCOVER - NOVA - AMEX - DINERS - EUROCARD - JCB - ACH 	Payment	String	No
PaymentReference	The notes associated with the payment. This will contain the reference number if the invoice was paid with a payment gateway.	Payment	String	No