

# ERP CONNECTOR – VISMA ADMINISTRATION

## Installation description



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# PREPARATIONS

- Make sure that you have access to the customers Visma-server for installing the Syncify Service.
- Make sure that you know which Visma-database (which Visma company) the customer is using and the path to this on the server. Default path is usually *C:\ProgramData\SPCS\SPCS Administration\Företag\XXX*

If you are installing the ERP Connector for a hosting customer:

- Make sure that the web client is enabled in order to use the REST API.

# INSTALLATION

Everything you need to install for the ERP-connector is found in the "Install"-folder.

CRM > Consultant Modules > ERP Connector (Visma) > erpconnector > Install			
Name		Date modified	Type
1. SQL		2017-06-14 19:49	File folder
2. LISA (icons, separators & users)		2017-06-14 19:52	File folder
3. VBA		2017-05-29 14:45	File folder
4. ACTIONPAD		2017-06-14 19:41	File folder
5. SYNCIFY SERVICE		2017-06-20 18:54	File folder

The Syncify service is zipped and found here: *F:\Products\Lime CRM\Consultant Modules\ERP Connector (Visma)*

## 1. Add tables, separators and icons

1. Add the tables and fields needed for the ERP Connector by running the scripts in the database found in the folder **1. SQL**. Add these in the order from 1 to 5 according to their title. **OBS!** If it is an existing hosting customer, you need to add the tables and fields manually.
2. Go to LISA and add the icons for the tables "invoice" and "invoicerow" that you find in the folder **2. LISA (icons, separators & users)**. If you cannot find the tables in LISA – refresh the browser.
3. Add the separators to the table "Company" and "Invoice" according to the images below (also available in the folder **2. LISA (icons, separators & users)**).

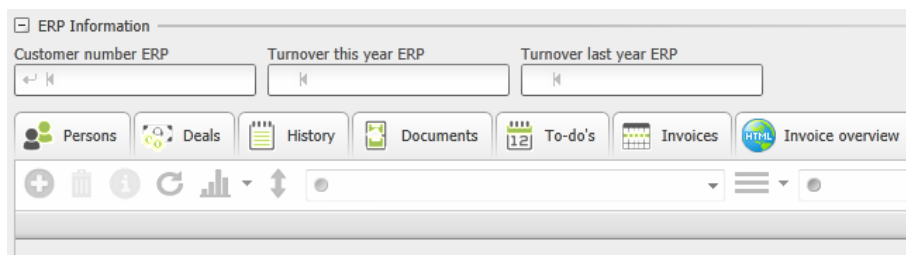


Figure 1. Separator on the company table.

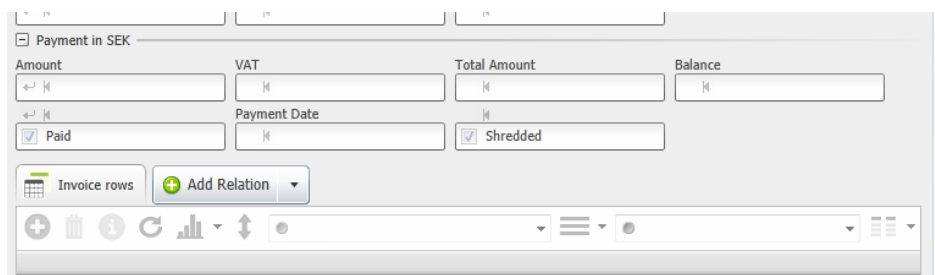


Figure 2. Separator on the invoice table.

## 2. Add users, group and security policy

1. Add two different users according to the images below:
  - a. **erpmigration** – this user will run the migrations from Visma and should be of Type = Integration. Add the user to the group “Superusers”.
  - b. **erpsync** – this user will run the continuous sync from the ERP-system to Lime CRM should be of Type = API. Add the user to the group “Superusers”.
2. Generate an API-key for the **erpsync**-user. Make sure to save this key!

The figure shows two side-by-side screenshots of the 'User Properties' dialog box in a system administration tool.

**Left Screenshot (erpmigration user):**

- Display Name:** erpmigration
- Username:** erpmigration
- Password:** [Redacted]
- Active:** Yes
- Type:** Integration
- Login:** Database Default
- Windows Account:** Domain: FNHXL2, User: [Redacted]
- Groups:** A table showing the user is a member of the 'ERP Connector' group.

Display Name	Member Of
ERP Connector	<input checked="" type="checkbox"/>
Superanvändare	<input checked="" type="checkbox"/>
Administratörer	<input type="checkbox"/>
Användare	<input type="checkbox"/>
Användare av LIME for Smartphoi	<input type="checkbox"/>
Malladministratörer	<input type="checkbox"/>

**Right Screenshot (erpsync user):**

- Display Name:** erpsync
- Username:** erpsync
- Active:** Yes
- Type:** API
- Groups:** A table showing the user is a member of the 'ERP Connector' group.

Display Name	Member Of
ERP Connector	<input checked="" type="checkbox"/>
Superanvändare	<input checked="" type="checkbox"/>
Administratörer	<input type="checkbox"/>
Användare	<input type="checkbox"/>
Användare av LIME for Smartphoi	<input type="checkbox"/>
Malladministratörer	<input type="checkbox"/>

Figure 3. erpmigration and erpsync-users.

3. Create a group “ERP-connector” and add the users to this group.

The figure shows the 'Group Properties' dialog box for the 'ERP Connector' group.

**Name:** ERP Connector

**Description:** Group for the users running the ERP Connector.

**Display Name:** sv: ERP Connector, en\_us: ERP Connector, da: ERP Connector, no: ERP Connector, fi: ERP Connector

**Windows Account:** Domain: FNHXL2, Group: [Redacted], Auto-create users: No

**Members:** A table showing the group members.

Name	Is member
erpmigration erpmigration	<input checked="" type="checkbox"/>
erpsync erpsync	<input checked="" type="checkbox"/>
Administrator admin	<input type="checkbox"/>
Ladi User ladiuser	<input type="checkbox"/>
Lime Administrator limeadmin	<input type="checkbox"/>
Lime WS Extranet limewsextrane	<input type="checkbox"/>
Lime WS Mail Gateway limewsmz	<input type="checkbox"/>
Lundalogik Test-user llabuser	<input type="checkbox"/>
User for LIME for Smartphones Se	<input type="checkbox"/>
Synchronization User syncuser	<input type="checkbox"/>

**Buttons:** Save, Cancel

Figure 4. Group "ERP Connector".

4. Create a security policy "tbl\_erp". Give the group "ERP Connector" full rights. Give the group "Users" read-access.

**New Policy**

**Name**  
tbl\_erp

**Description**  
Security policy for tables needed for ERP Connector.

**Display Name**  
sv ERP Tables  
en\_us ERP Tables  
da ERP Tables  
no ERP Tables  
fi ERP Tables

**Type**  
Tables and fields

**Group Access**

Filter

Group	R	W	A	D
Administratörer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Användare	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Superanvändare	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Malladministratörer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Användare av LIME for Smartpho	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ERP Connector	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Save Cancel

Figure 5. Security policy for ERP Connector.

5. Add the security policy to the invoice and invoicerow table.

**Faktura Properties**

**Name**  
invoice

Table Order: 19

Display Name Singular: sv Faktura, en Invoice, da Faktura, no Faktura, fi Lasku  
Plural: sv Fakturor, en Invoices, da Fakturaer, no Fakturaer, fi Laskut

Label: None, Invisible: No, Policy: ERP Tables

Log Changes: ☐, Is Virtual: ☐

Comment:

Save Cancel

**Fakturarad Properties**

**Name**  
invoicerow

Table Order: 20

Display Name Singular: sv Fakturarad, en Invoice Row, da Fakturarække, no Fakturarad, fi Laskurivi  
Plural: sv Fakturarader, en Invoice rows, da Faktura rækker, no Fakturarader, fi Laskurivit

Label: None, Invisible: No, Policy: ERP Tables

Log Changes: ☐, Is Virtual: ☐

Comment:

Save Cancel

Figure 6. Security policy on the invoice and invoicerow tables.

### 3. Add VBA to the desktop client

1. Add ERPConnector.bas to the VBA (found in the folder **3. VBA**).

2. If there does not exist a controlshandler for the company-table – add this to GeneralControlsHandler” (copy from GeneralControlsHandler.txt)
3. If there does not exist a ControlsHandlerCompany, add this according to ControlsHandlerCompany.txt.
4. If it exist a ControlsHandlerCompany - add the code marked with ‘ERP CONNECTOR GRAPH START in ControlsHandlerCompany.txt to ControlsHandlerCompany.
5. Compile the VBA and make sure you do not get any errors.
6. Save the VBA.

#### 4. Add link to the company Actionpad

1. Add the code to the company Actionpad highlighted with <!-- ERP CONNECTOR APP START--> from the file company.html in the folder **4. ACTIONPAD**.
2. In config-section: change “vismaserver” in erpUrl to match the name of the server where Visma is installed (and where the integration service is installed, see step 7 below).

```
<!-- ERP CONNECTOR APP START-->
<div data-app="{app: 'erpconnector', config: {
  erpUrl: 'http://vismaserver:8080/api/customer'
} }">
</div>
<!-- ERP CONNECTOR APP END-->|
```

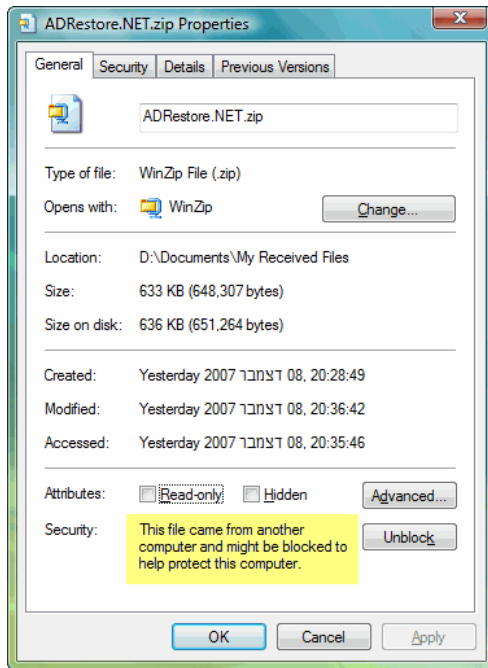
Figure 7. Company actionpad.

#### 5. Add the erpconnector-folder to the app-folder

1. Add the entire erpconnector-folder (you can delete the “Install”-folder if you like) to the app-folder.
2. Publish the Actionpads.

#### 6. Install and configure SyncifyService

1. Copy the SyncifyService zip-file to the Visma Server.
2. Make sure to check if you need to unblock the zip-file by right-clicking the file. If the text is shown – click the “Unblock”-button.



3. Unzip the service in a suitable folder (C:\Programs\VisualIntegration for example).
4. Install Python 3.6.1 as an administrator (right-click and select "Run as administrator"). You find the installer in the folder **Migration**.

**OBS! You need to add Python to path by checking the box in the image below!**

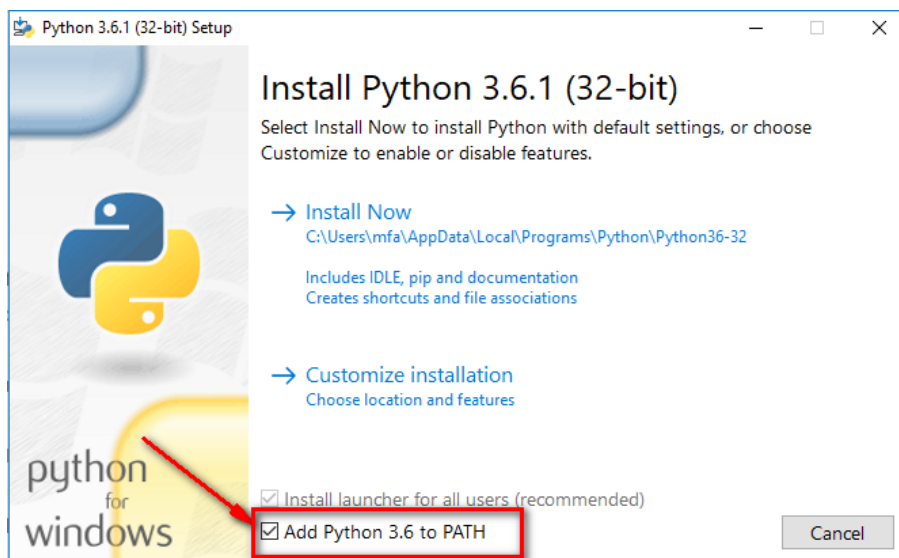


Figure 8. Add Python to path.

5. Go back to main root and start Syncify.Client.CrmDesktopSetup.exe as administrator.
6. The form below will show. Go through the form in the following order (see letters in image):

**Integration Setup**

**ERP Settings**

☒ Visma Administration  
☐ Navision  
☐ Visma Business

Path to the "Gemensamma filer" folder  
 C:\ProgramData\SPCS\SPCS Administr... **Pick Folder a**

Path to the company folder  
 C:\ProgramData\SPCS\SPCS Administr... **Pick Folder b**

**Lime Settings**

Lime Server: https://localhost:443/ **c**  
 Lime Database: Lime CRM Training **d**  
 Lime Username: erpmigration **e**  
 Lime Password: password **f**  
 API URL: https://localhost:443/lime%20crm%20api/v1 **g**  
 API Key: 3AC127D924D2F5C8D3932AEE955CABE **h**

Python is installed

1 Check / Save Settings  
 2 Install Syncify Service Service is installed  
 3 Migration

☒ Migration from specific date  
 den 27 juli 2017  
 Migration from specific date

Figure 9. Syncify Service setup.

- Select the folder for "Gemensamma filer" for Visma Administration by pressing "Pick folder" (a). The folder usually have this path: `C:\ProgramData\SPCS\SPCS Administration\Gemensamma filer`
- Select the path to the company folder for the company that is being used by pressing "Pick folder" (b). The folder usually have the path `C:\ProgramData\SPCS\SPCS Administration\XXX`
- Enter the address to the Lime Server. If you are using the default port 443, you do not need to add the port number.
- Add the name of the Lime CRM Application. **OBS!** Not the database name, but the Display name.
- Add the name of the user you created in step 2 – **erpmigration**.
- Add the password for the user you created in step 2.
- Add the API URL. You can find this by logging in top the webclient as an administrator and pressing "API Documentation" in the menu. The URL in the browser minus /docs/ is the API URL. The URL has the form:  
[https://example.com/my\\_app/api/v1](https://example.com/my_app/api/v1).
- Add the API Key that you created previously in step 2.



6. Press the button "1 Check/Save Settings". This will verify the information in the form and save the settings in the settings file.
7. Press "2 Install Syncify Service". This will install the Syncify Service as a Windows Service on the Visma Server.

8. Press "3 Migration" when you are ready to migrate all customers, invoices and invoicerows from Visma to Lime CRM. When pressing this button, the data is extracted from Visma Administration to textfiles, which are imported using the Python import. The files are placed in the "Migration"-folder before migrated.

OBS! The migration uses the field "**erpId**" as key when creating companies. If you already have customer in the database from Visma, you need to add the corresponding Visma ID to this field before migrating. Otherwise, the migration script will create duplicates.

9. Make sure that the Syncify Service is running as Windows Service.

## **7. ALL DONE!**