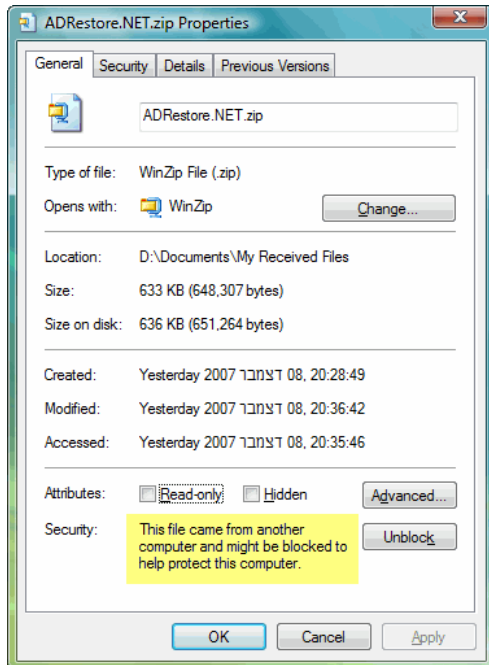


## 1. Install and configure SyncifyService

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\VismaIntegration 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 1. 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):

Figure 2. Syncify Service setup.

- a. 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*
- b. 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*
- c. Enter the address to the Lime Server. If you are using the default port 443, you do not need to add the port number.
- d. Add the name of the Lime CRM Application. **OBS!** Not the database name, but the Display name.
- e. Add the name of the user you created in step 2 – **erpmigration**.
- f. Add the password for the user you created in step 2.

- g. 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).
  - h. 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.

## 2. ALL DONE!