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*
- Syncify requires Powershell 3.0.
  If the customer is running Windows Server 2008 or earlier, you need to upgrade from 2.0 to 3.0. Here is a step-by-step guide

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)).**

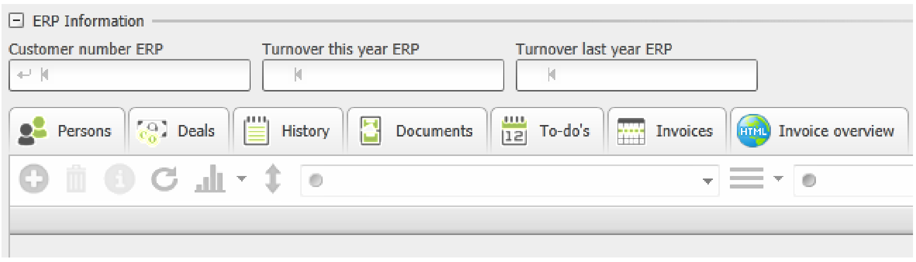


Figure 1. Separator on the company table.

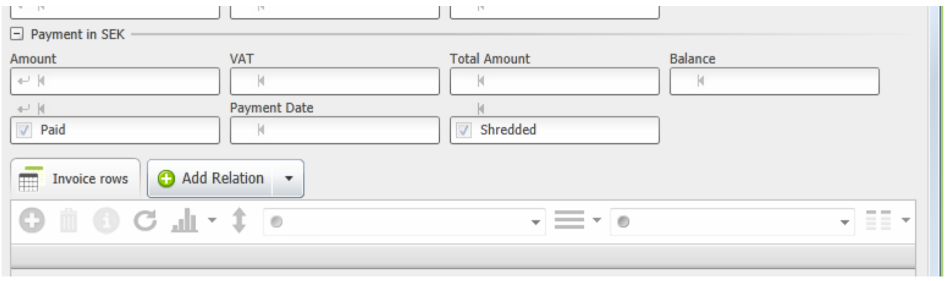


Figure 2. Separator on the invoice table.

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!

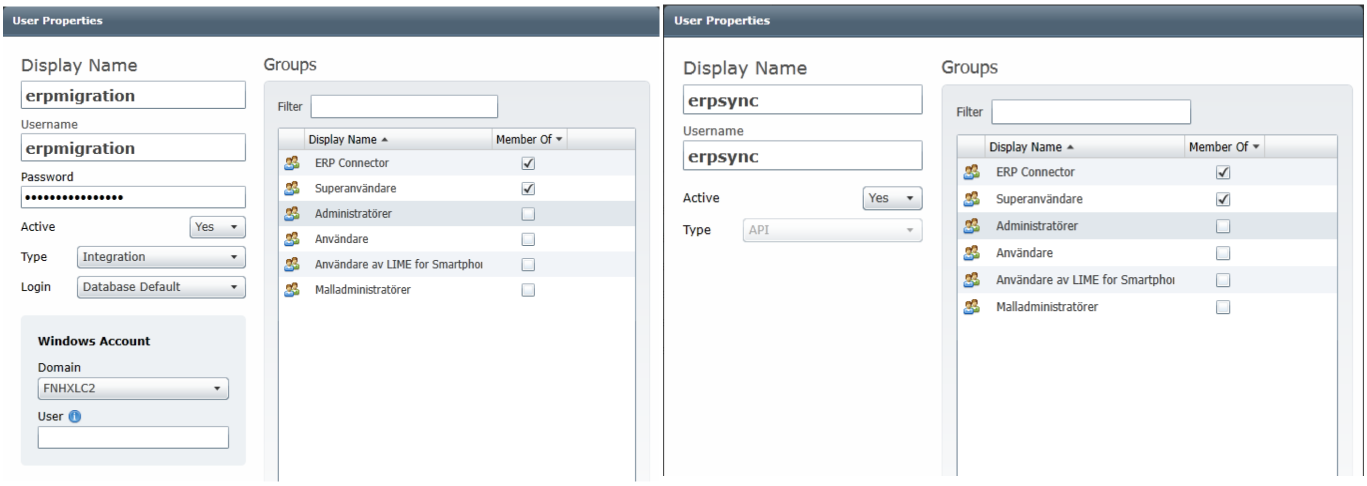


Figure 3. erpmigration and erpsync-users.

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

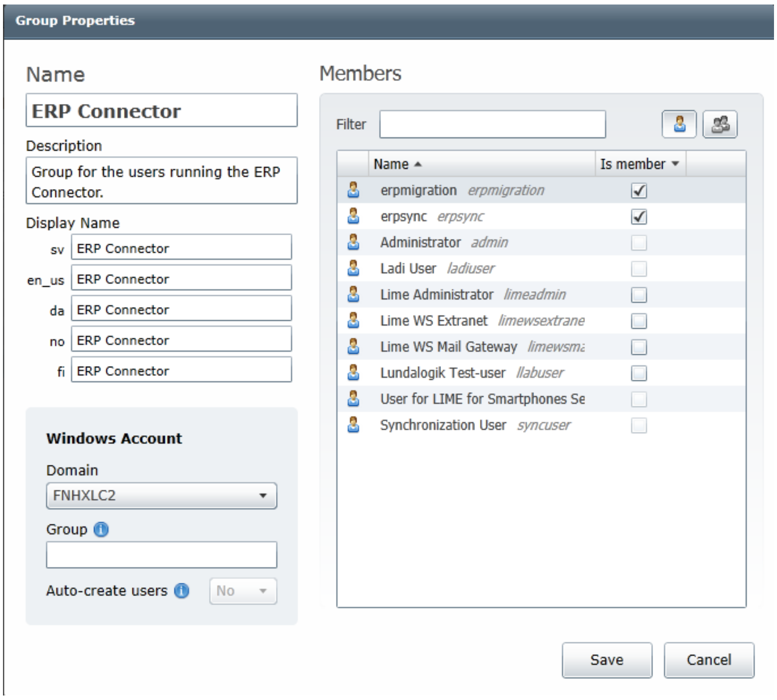


Figure 4. Group "ERP Connector".

4. Create a security policy “tbl_erp”. Give the group “ERP Connector” full rights. Give the group “Users” read-access.

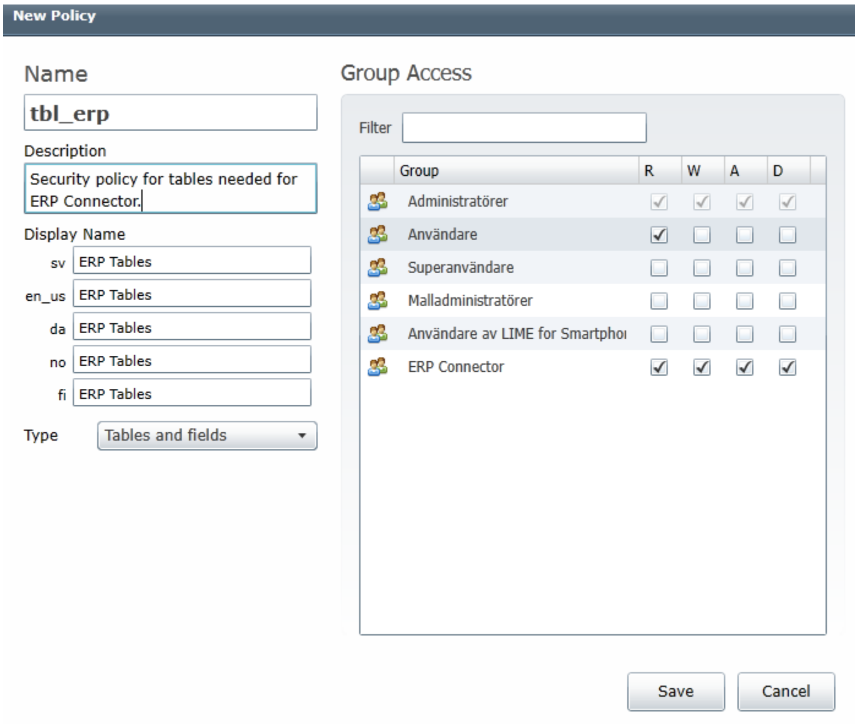


Figure 5. Security policy for ERP Connector.

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

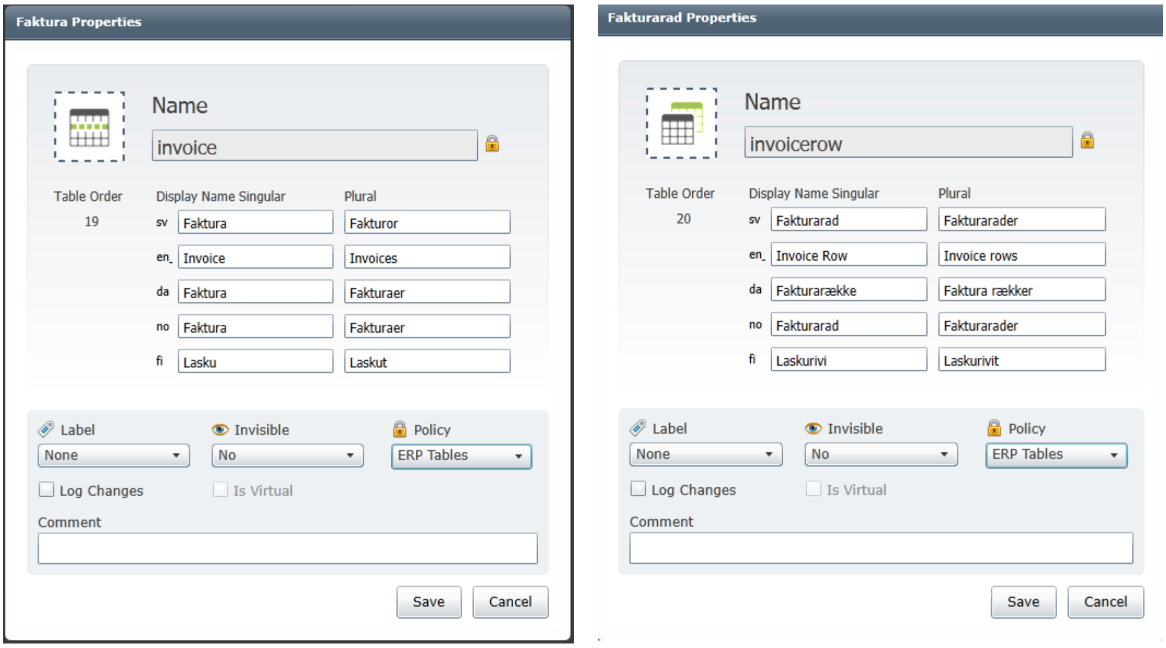


Figure 6. Security policy on the invoice and invoicerow tables.

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-->
```

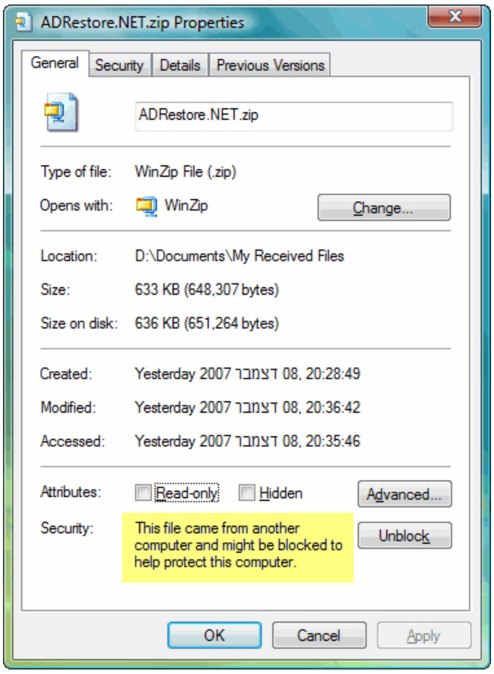
Figure 7. Company actionpad.

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\VismaIntegration for example).

4. Install Python 3.6.1 as an administrator (right-click and select “Runa 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!

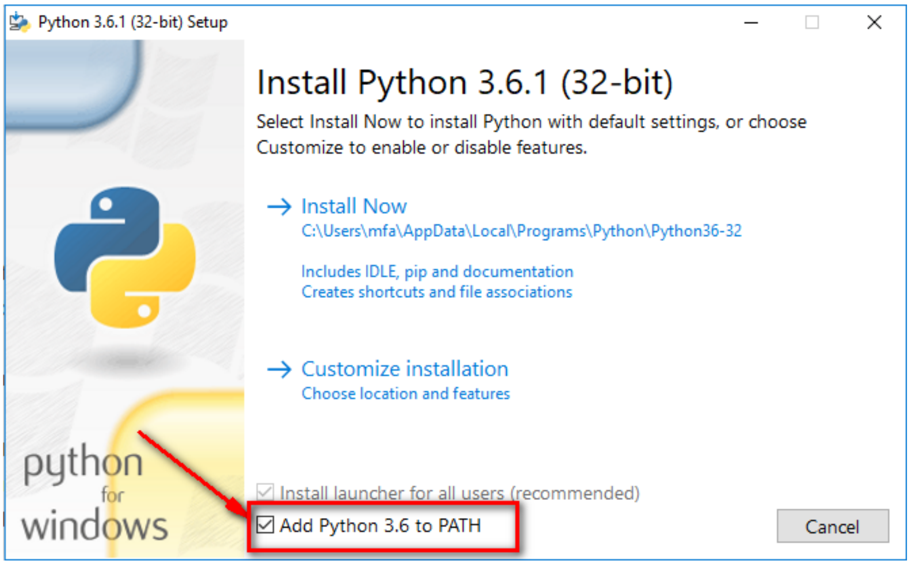


Figure 8. Add Python to path.

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):

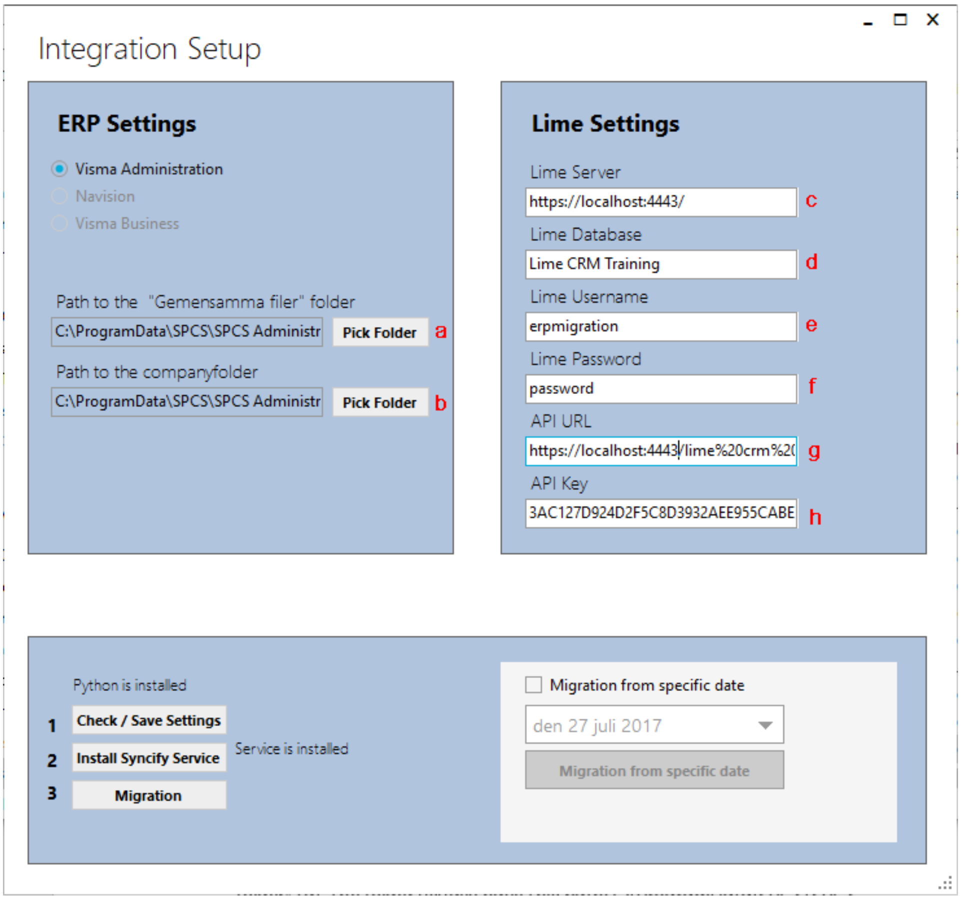


Figure 9. Syncify Service setup.

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. **OBS!** If the customer is in our cloud environment, the Lime Server address is https://login.limehosting.se

d. Add the name of the Lime CRM Application. **OBS!** Not the database name, but the Display name. **OBS 2!** If the customer is in our cloud environment – leave this field empty as the application name will be found through the username.

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`.

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.

7. ALL DONE!