



Contact us at: support@uniwin.se

WOOCOMMERCE VISMA INTEGRATION

Last Modified: 2017-Mar-28

Reading guide

I will mark all the tabs like this: **This is a tab**

Important marks will be highlighted in yellow text. **This is important**

WooVisma Version 1.2.7

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Introduction

WooCommerce Visma Integration (WooVisma) is a link between WooCommerce and Visma accounting system. WooVisma is a complete easy-to-use integration to synchronize your WooCommerce orders, customers and products to your Visma account. Choose to create an order or convert the order to an invoice. When a new customer purchase a product and goes through the registration and checkout process, all his customer data and order will instantly be synced to Visma. If any of his details are changed later on by himself or by admin, it will also instantly be updated in Visma.

The ORDER/INVOICE and PRODUCT sync features require a license purchase from <http://onlineforce.net> WooCommerce Visma integration plugin connects to license server hosted at <http://onlineforce.net> to check the validity of the license key you type in the settings page.

Plugin Requirement

1. PHP version : 5.3 or Higher, Tested upto 5.5.X
2. WordPress : WordPress 3.8 or higher, tested upto 4.7.3
3. This plugin requires the WooCommerce plugin

Installation Steps

1. Install WooVisma plugin either via the WordPress.org plugin directory, or by uploading the files to your server.
2. Activate the plugin in your WordPress admin dashboard and goto the admin panel Dashboard -> WooVisma.

Connection Settings General Settings Manual Functions Synced Status Log Settings

WooCommerce Visma Integration: License Key Invalid! [Get license Key](#)

Visma Access Settings

Https/Http : HTTPS HTTP

Client ID :

Client Secret :

Registered URI :

[Save](#) [Authenticate](#)

License key

License key : (This is the License key you received from us by mail.)

[Save](#)

Test Connection

Test Connection : [Test](#)

Connection settings

Please fill all the below details to configure the plugin.

- HTTPS/ HTTP

If you have visma account and https domain then you can choose HTTPS radio button.

If you have visma account and http domain then you can choose HTTP radio button. (Use HTTPS only! HTTP feature is only allowed for testing and availability is not guaranteed.)

- Client ID

Provided to you by Visma upon Partner solution registration.

- Client Secret

Your client secret, provided to you by Visma upon registration of your solution.

- Registered URI

Provided to you by Visma upon Partner solution registration. Please contact Visma if you need to change it to better suit your application.

Settings Saved

WooCommerce Visma Integration: License Key Invalid! [Get license Key](#)

Visma Access Settings

Https/Http : HTTPS HTTP

Client ID :

Client Secret :

Registered URI :

[Save](#) [Authenticate](#)

License key

License key : (This is the License key you received from us by mail.)

[Save](#)

Test Connection

Test Connection : [Test](#)

- License Key

Use the License Key that you have received by mail and save. Once saved, the License key invalid message should go.

The screenshot shows a web interface with a top navigation bar containing five tabs: "Connection Settings", "General Settings", "Manual Functions", "Synced Status", and "Log Settings". The "Connection Settings" tab is active. Below the tabs, the page is titled "Visma Access Settings".

Under "Visma Access Settings", there are four rows of configuration options:

- Https/Http**: A label followed by a colon and two radio buttons. The "HTTPS" radio button is selected (indicated by a blue dot), and the "HTTP" radio button is unselected.
- Client ID**: A label followed by a colon and a text input field containing a masked value.
- Client Secret**: A label followed by a colon and a text input field containing a masked value.
- Registered URI**: A label followed by a colon and a text input field containing a masked value.

Below these four rows, there are two blue buttons: "Save" and "Authenticate".

Below the "Visma Access Settings" section, there is a section titled "License key".

Under "License key", there is one row of configuration options:

- License key**: A label followed by a colon and a text input field containing a masked value. To the right of the input field, there is a note: "(This is the License key you received from us by mail.)".

Below the "License key" section, there is a section titled "Test Connection".

Under "Test Connection", there is one row of configuration options:

- Test Connection**: A label followed by a colon and a blue button labeled "Test".

- Click Authenticate, and fill your visma account credentials, and click allow. You should see **Authentication success** message. If the Authentication fails, then please contact Support.

Connection Settings | General Settings | Manual Functions | Synced Status | Log Settings

Authentication Success

Visma Access Settings

Https/Http : HTTPS HTTP

Client ID :

Client Secret :

Registered URI :

License key

License key : (This is the License key you received from us by mail.)

Test Connection

Test Connection :

- Finally, click the test button to confirm your settings. You should see **Your Integration works fine** message. If the test fails, then please check your Settings.

Connection Settings | General Settings | Manual Functions | Synced Status | Log Settings

Your Integration Works Fine

Visma Access Settings

Https/Http : HTTPS HTTP

Client ID :

Client Secret :

Registered URI :

Save Authenticate

License key

License key : (This is the License key you received from us by mail.)

Save

Test Connection

Test Connection :

General Settings

1. Here you can enable automatic sync by choosing the Enabled option from automatic sync dropdown under Sync settings.

- Automatic Sync For Product - If product is created in woocommerce, it will be automatically synced with Visma account.
- Automatic Sync For Customer - If customer is created in woocommerce, it will be automatically synced with Visma account.
- Automatic Sync For Order - If order is created in woocommerce, it will be automatically synced with Visma account.

Connection Settings **General Settings** Manual Functions Synced Status Log Settings

Sync Settings

Automatic sync : Enabled ▾

Product Prefix : The total number of characters in SKU with prefix should not exceed 15

Product Stock Update Only :

Order sync settings

Activate old orders sync : Also sync orders created before woovisma installation.

On Checkout : Create Order ▾

Terms of payment : - None - ▾

Initiate order sync : Based on an Event ▾

Checkout Order Processed

Default Tax Setting

Product Tax : - None - ▾ (Select default tax settings to be used for new products. Setting can be changed if needed on the right side top block)

2. Here you can enable product stock update only option by clicking the "Product Stock Update Only" Checkbox under Sync Settings.

3. Here you can enable "Activate old orders sync" (orders created before woovisma installation) by clicking the "Activate Old Orders Sync " Checkbox under Order Sync Settings.

4. Here you can choose create order or create invoice when checkout happens by Choosing the dropdown from On Checkout Dropdown under Order Sync Settings.

5. Here you can initiate order sync "Based on an Event" or "Based On order status" by Choosing the dropdown from Initiate Order Sync Dropdown under Order Sync Settings.

Connection Settings | **General Settings** | Manual Functions | Synced Status | Log Settings

Sync Settings

Automatic sync : Enabled ▾

Product Prefix : The total number of characters in SKU with prefix should not exceed 15

Product Stock Update Only :

Order sync settings

Activate old orders sync : Also sync orders created before woovisma installation.

On Checkout : Create Order ▾

Terms of payment : - None - ▾

Initiate order sync :
Based on an Event ▾
Based on an Event
Based on Order status ▾

Default Tax Setting

Product Tax : - None - ▾ (Select default tax settings to be used for new products. Setting can be changed if needed on the right side top block)

6. Here you can specify terms of payment for your invoices.

Connection Settings **General Settings** Manual Functions Synced Status Log Settings

Sync Settings

Automatic sync : Enabled ▾

Product Prefix : The total number of characters in SKU with prefix should not exceed 15

Product Stock Update Only :

Order sync settings

Activate old orders sync : Also sync orders created before woovisma installation.

On Checkout : Create Order ▾

Terms of payment : - None - ▾

Initiate order sync :

- None -
- Net 10 days
- Net 14 days
- Net 20 days
- Net 30 days
- Net 45 days
- Net 60 days
- Net 90 days
- Net 120 days

Default Tax Setting

Product Tax :

- Cash
- Cash on delivery
- Online payment Payson
- Online payment Netaxept
- iZettle, Swish etc
- Online payment PayPal
- Payson Invoice
- Payson checkout 2.0

(Select default tax settings to be used for new products. Setting can be changed if needed on the right side top block)

7. Here you can specify your Common tax value for your products.

Connection Settings **General Settings** Manual Functions Synced Status Log Settings

Sync Settings

Automatic sync : Enabled ▾

Product Prefix : The total number of characters in SKU with prefix should not exceed 15

Product Stock Update Only :

Order sync settings

Activate old orders sync : Also sync orders created before woovisma installation.

On Checkout : Create Order ▾

Terms of payment : - None - ▾

Initiate order sync : Based on an Event ▾

Checkout Order Processed

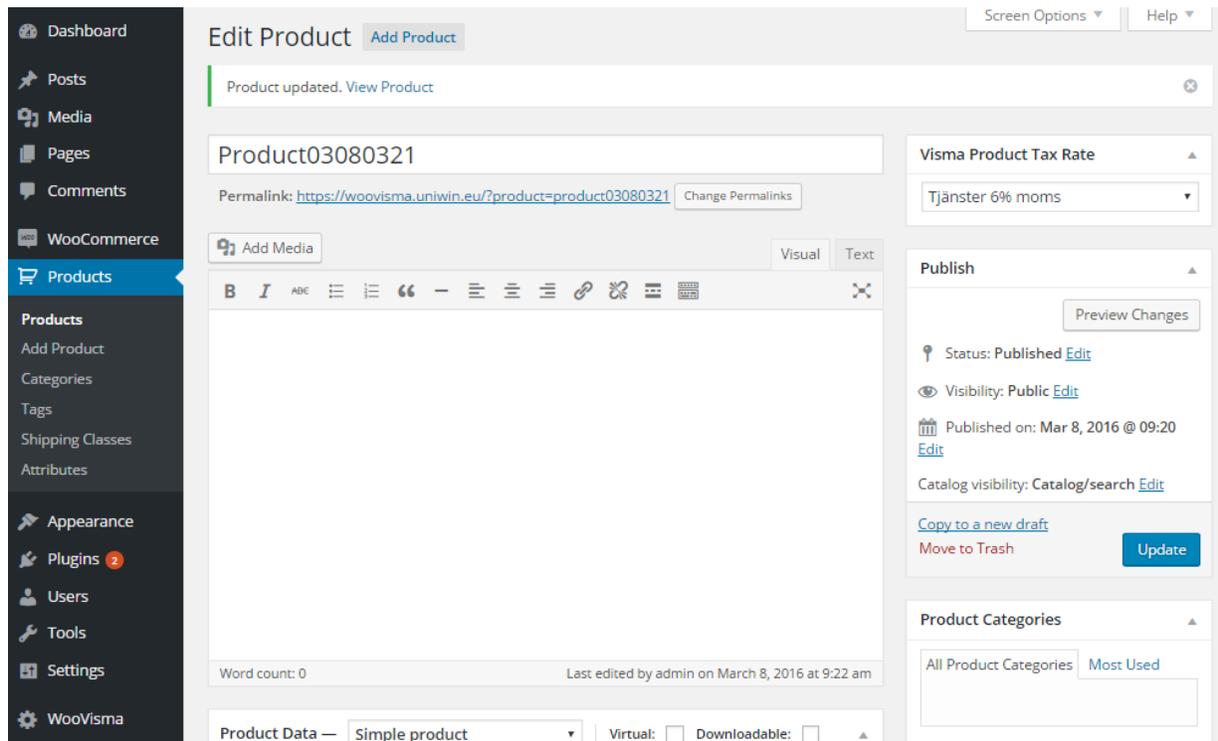
Default Tax Setting

Product Tax :

- None -
- None -
- Tjänster 12% moms
- Tjänster 6% moms
- Expeditionsavgift 12%
- Varor 12% moms
- Varor 25% moms
- Varor 0% moms
- Tjänster 25% moms
- Varor 6% moms
- Tjänster 0% moms
- Expeditionsavgift 25%
- Expeditionsavgift 6%

(Select default tax settings to be used for new products. Setting can be changed if needed on the right side top block)

8. If you want to specify different tax for a particular product, Goto product and click edit, here you can see "Visma Product Tax Rate" Dropdown on top right corner.



Prepare for sync

For the sync to take place properly, all necessary attributes needs to be set. This applies for the manual sync as well as for the automatic sync. Here are the check lists:

Product Sync: All main products and variable products must have a valid and unique SKU (varunummar). If valid SKU is missing, the product id is considered as SKU.

Customer Sync: All customers must have a unique email address. Customers a mapped with their email addresses. Beside that all customer's needs to have a Billing details filled in.

Order/Invoice Sync: Products and Customers must be synced before order/Invoice can be synced.

Manual functions

1. Run **Product Sync WooCommerce → Visma** to sync all your WooCommerce products to visma account.

2. Run **Product Sync Visma → WooCommerce** to sync all your Visma products to WooCommerce.

3. Run **Customer Sync WooCommerce → Visma** to sync all your WooCommerce Customers to visma account. All customers must have a unique email address.
4. Run **Customer Sync Visma → WooCommerce** to sync all your Visma Customer to WooCommerce. All customers must have a unique email address.
5. Run **Order Sync WooCommerce → Visma** to sync all your WooCommerce Orders to visma account.
6. Run **Order Sync Visma → WooCommerce** to sync all your Visma Orders to WooCommerce.

Connection Settings	General Settings	Manual Functions	Synced Status	Log Settings
<h3>Manual Data Sync</h3>				
Product Sync WooCommerce -> Visma				
Send all products to your visma eAccounting. If you have many products, it may take a while.				
Customer Sync WooCommerce -> Visma				
Send all customers to your visma eAccounting. If you have many customers, it may take a while.				
Order Sync WooCommerce -> Visma				
Send all orders to your visma eAccounting. If you have many orders, it may take a while.				
Product Sync Visma -> WooCommerce				
Get all products from your visma eAccounting. If you have many products, it may take a while.				
Customer Sync Visma -> WooCommerce				
Get all customers from your visma eAccounting. If you have many customers, it may take a while.				
Order Sync Visma -> WooCommerce				
Get all orders from your visma eAccounting. If you have many orders, it may take a while.				

Synced status

Here you can see synced record details and not synced record details for Product, Customer, Order. You can sync the Unsynced records by clicking **Sync**.

Connection Settings | General Settings | Manual Functions | **Synced Status** | Log Settings

Choose ▾ Synced Not Synced

Connection Settings | General Settings | Manual Functions | **Synced Status** | Log Settings

Product ▾ Synced Not Synced

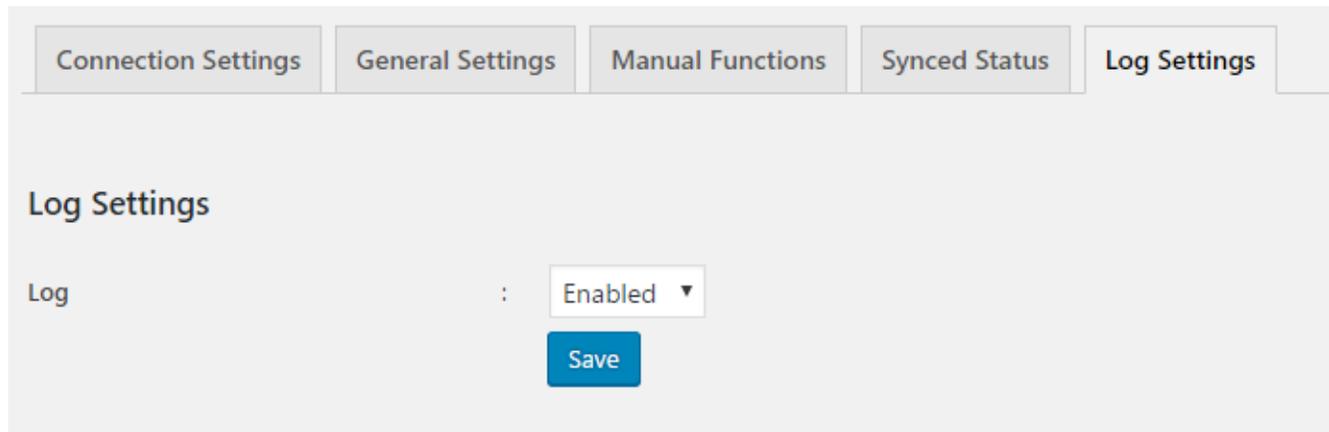
Not Synced Products

<input type="checkbox"/>	Name	SKU	Sync
<input type="checkbox"/>	Prod1703221543	Prod1703221543	Sync
<input type="checkbox"/>	Prod1703221532	SKU1703221532	Sync
<input type="checkbox"/>	prod210320171256		Sync
<input type="checkbox"/>	prod210320171230		Sync
<input type="checkbox"/>	prod200320171124		Sync
<input type="checkbox"/>	prod180320171228		Sync
<input type="checkbox"/>	prod180320171143		Sync
<input type="checkbox"/>	Prod180320171135	3258	Sync
<input type="checkbox"/>	prod030620170119	2863	Sync
<input type="checkbox"/>	prod5	prod5	Sync

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Log settings

Choose **Enabled** option from the log dropdown and click **Save**.



The screenshot shows a settings interface with a horizontal menu at the top containing five tabs: "Connection Settings", "General Settings", "Manual Functions", "Synced Status", and "Log Settings". The "Log Settings" tab is selected. Below the menu, the heading "Log Settings" is displayed. Underneath, there is a label "Log" followed by a colon and a dropdown menu currently showing "Enabled". Below the dropdown is a blue "Save" button.

The log will be generated in `/wp-content/plugins/woovisma/woovisma.html`. You can view your log through browser.

`https://[REDACTED]/wp-content/plugins/woovisma/woovisma.html`

`http://[REDACTED]/wp-content/plugins/woovisma/woovisma.html`

-- Thank You --

