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Service as it should be

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.

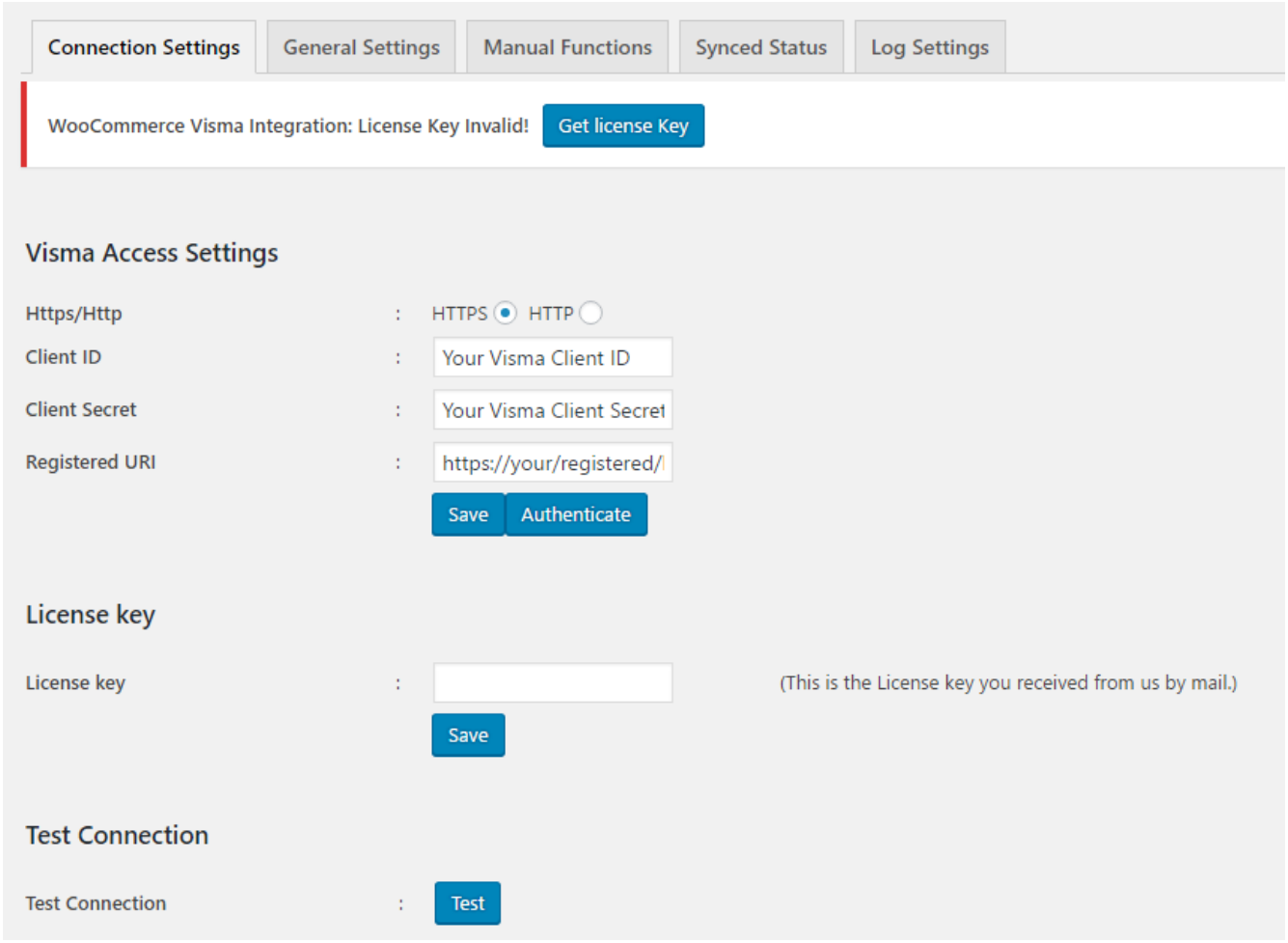
Plugin Requirement

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

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

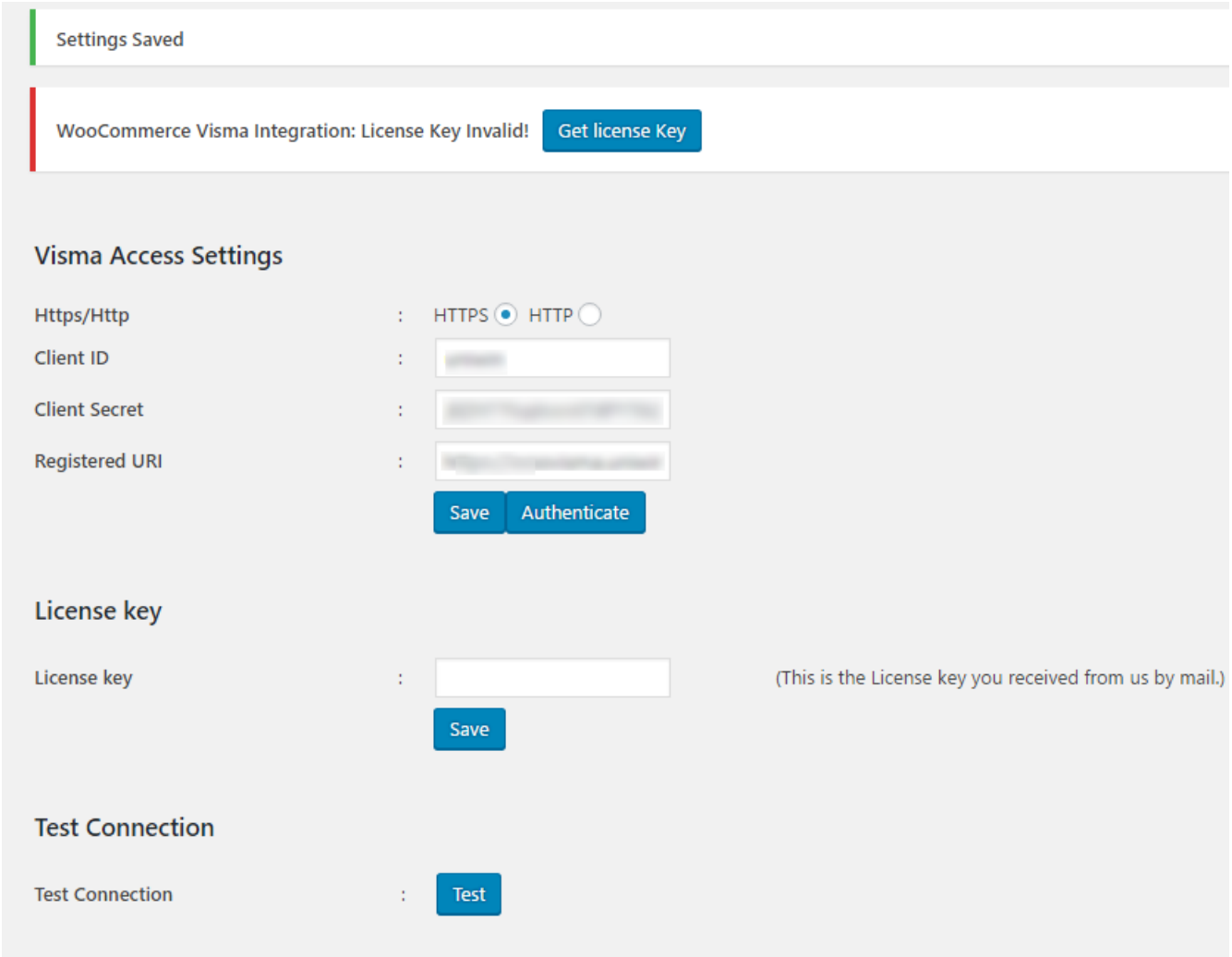
  Provided to you by Visma upon Partner solution registration.

- Client Secret

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

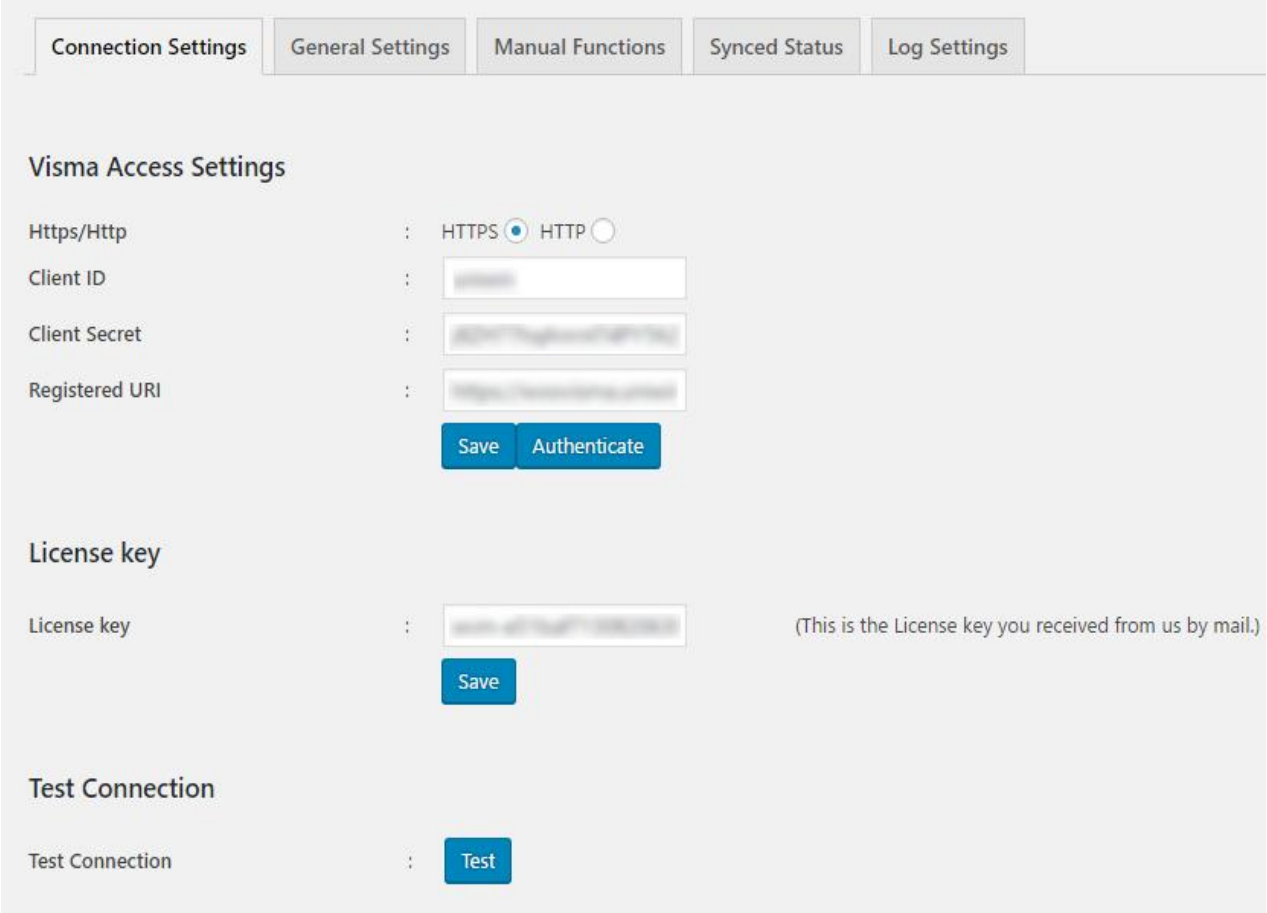
- Registered URI

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

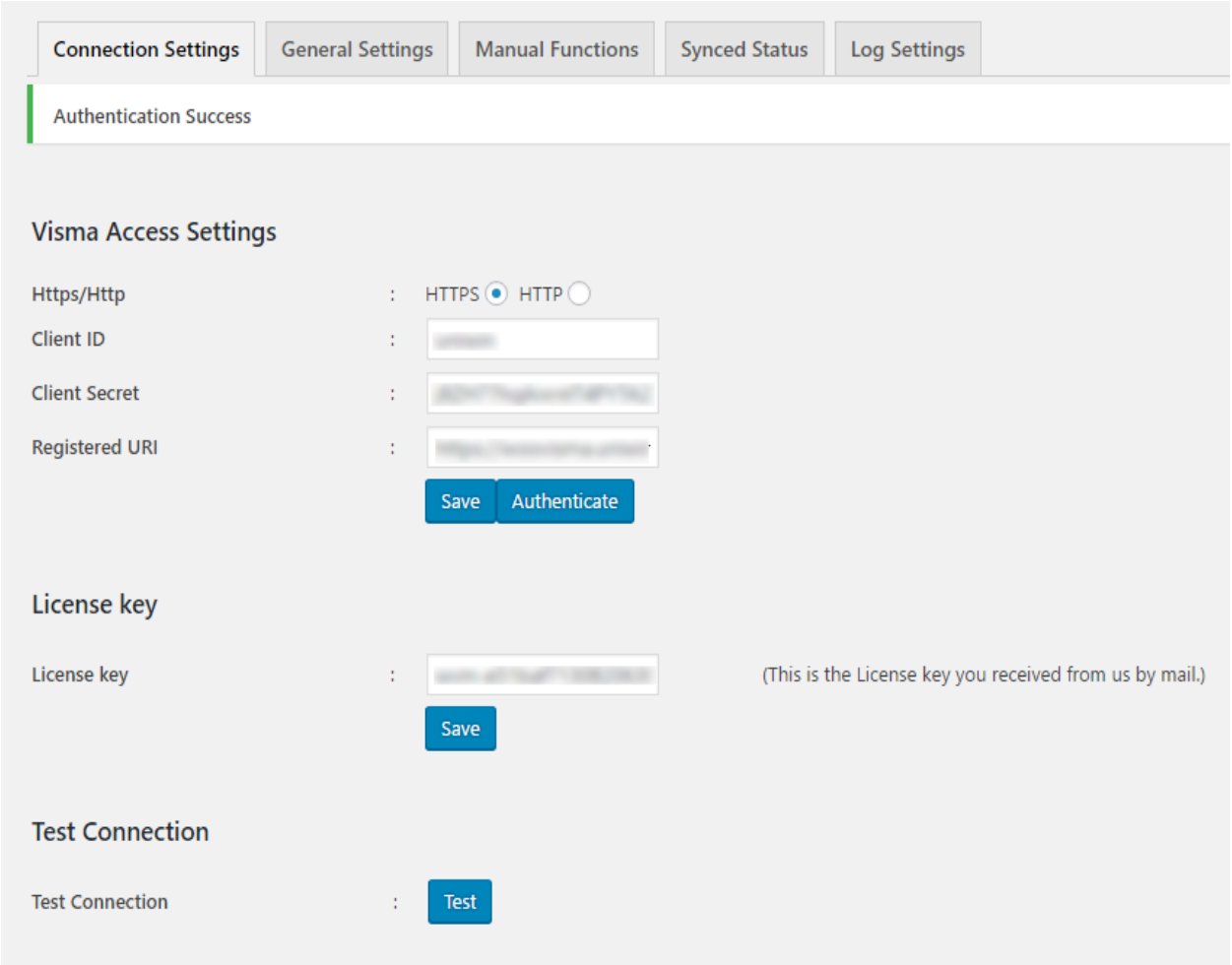


- License Key

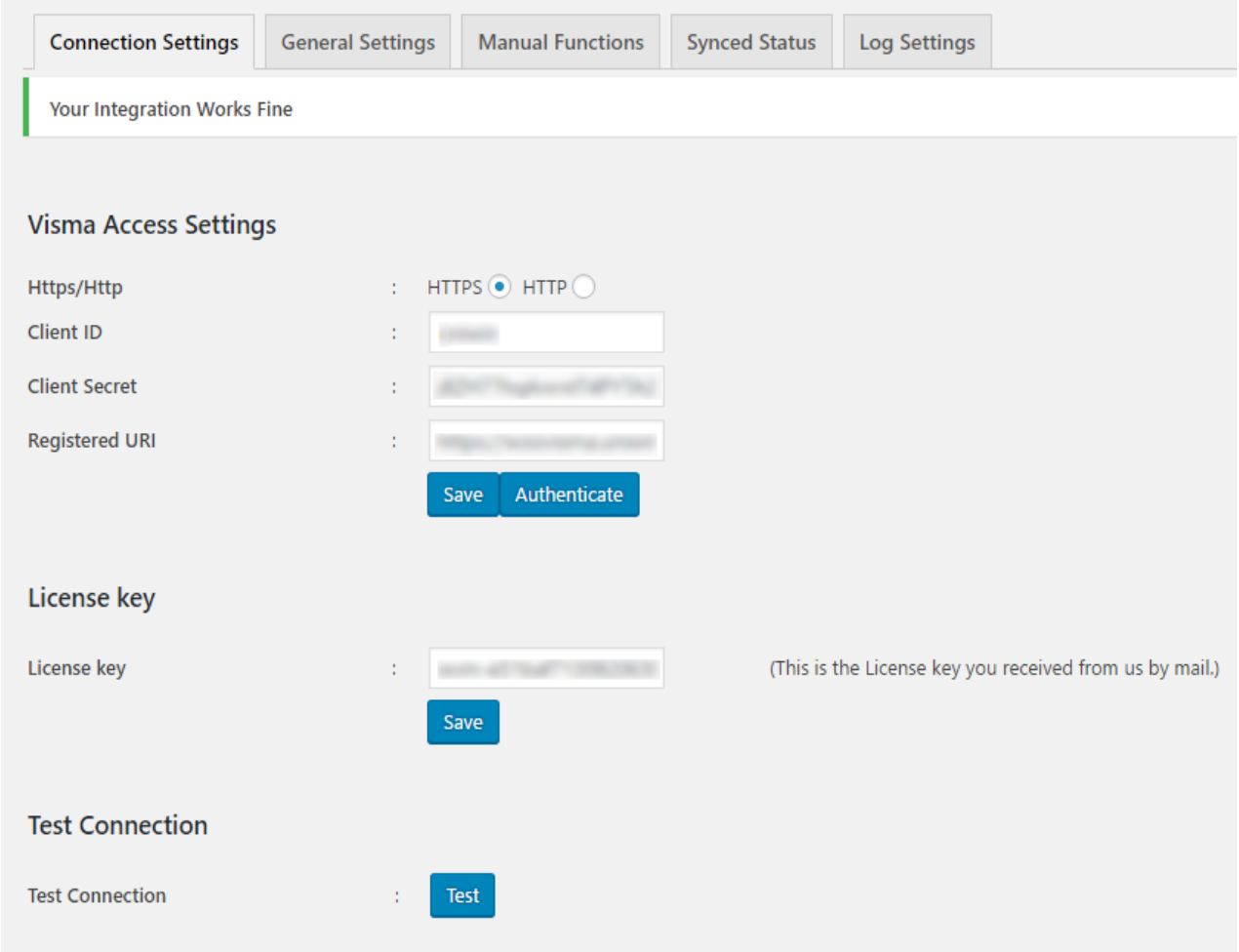
  Use the License Key that you have received by mail and save. Once saved, the License key invalid message should go.



- 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.



- 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.



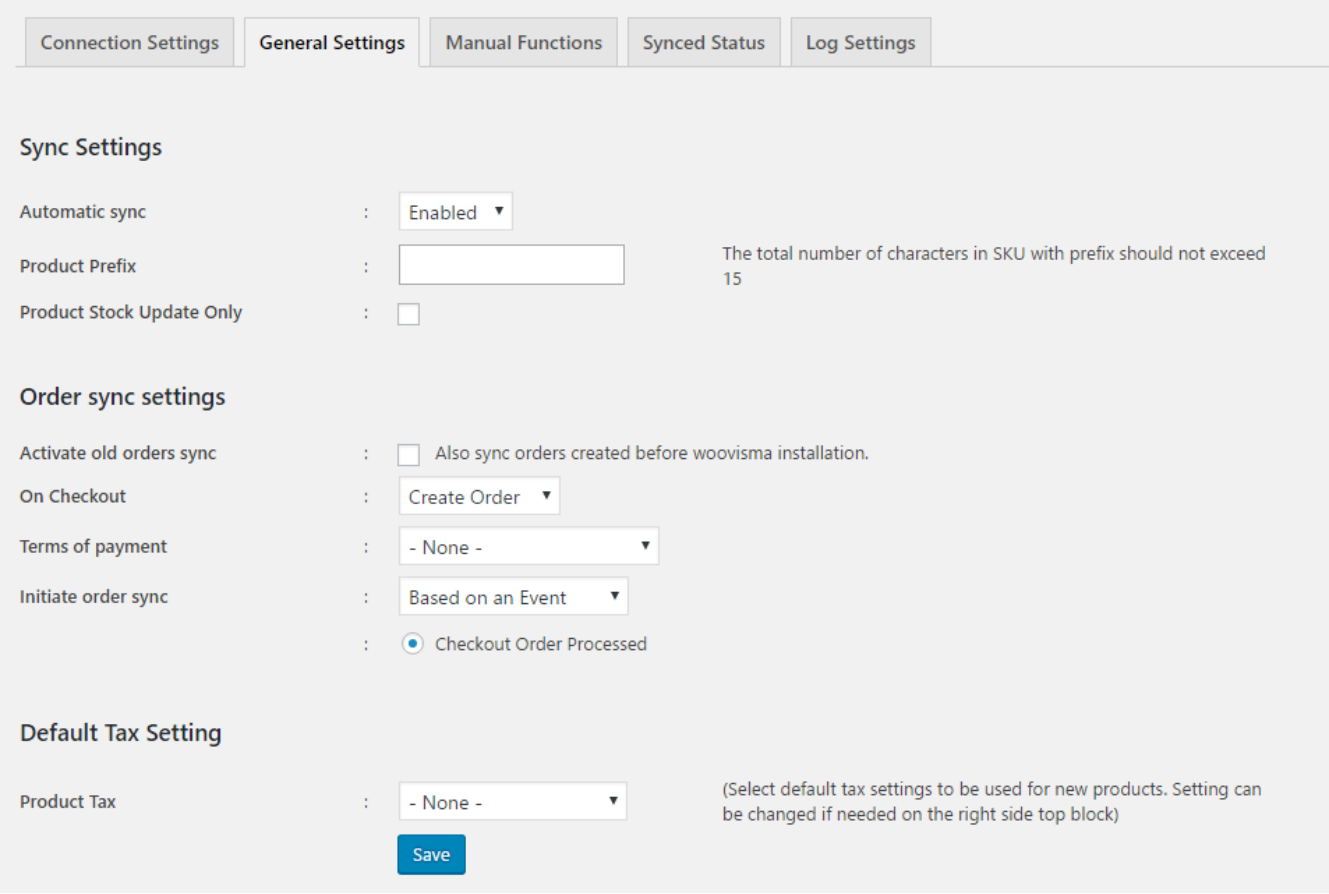
General Settings

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.

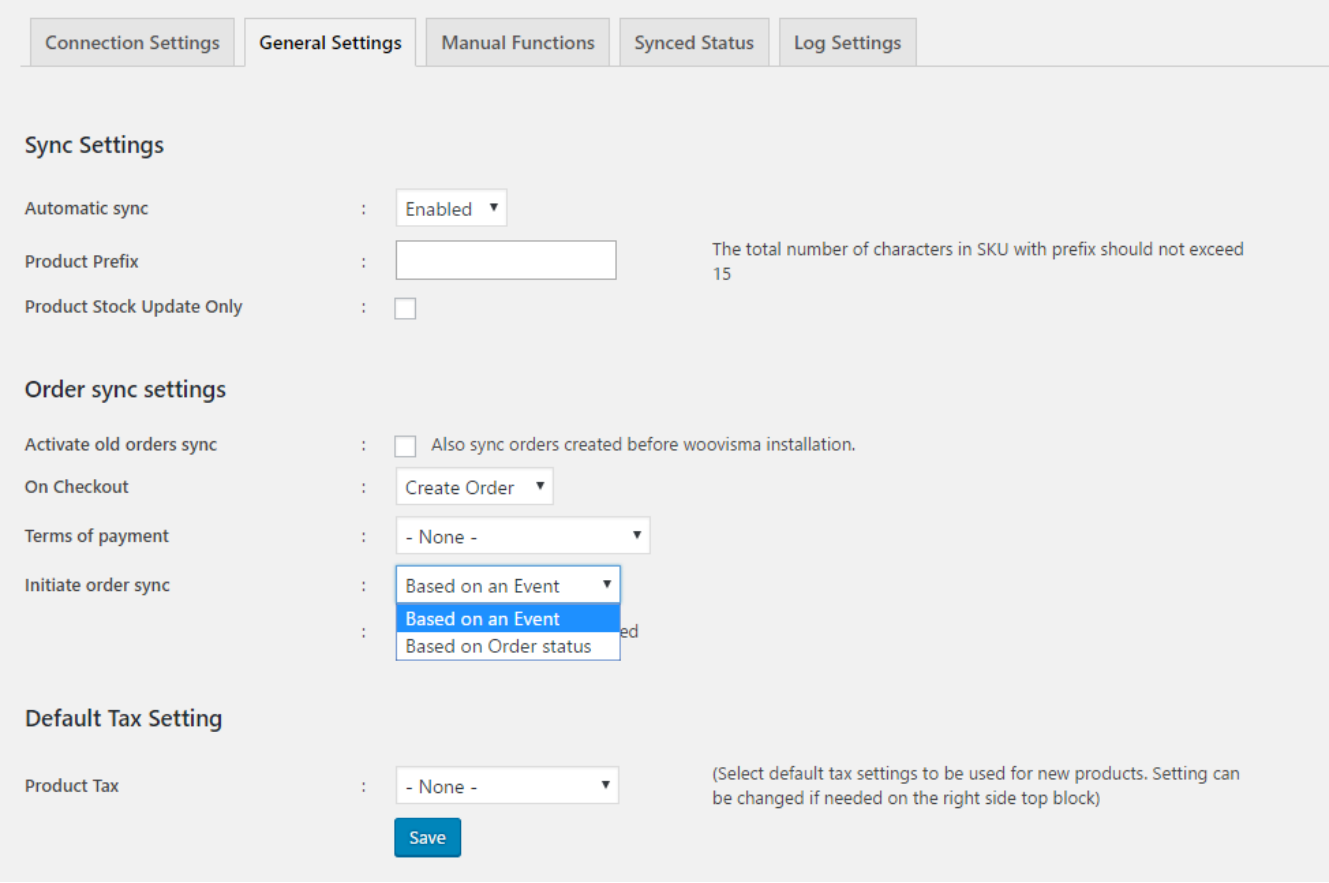


2. Here you can enable product stock update only option by clicking the "Product Stock Update Only" Checkbox under Sync Settings.

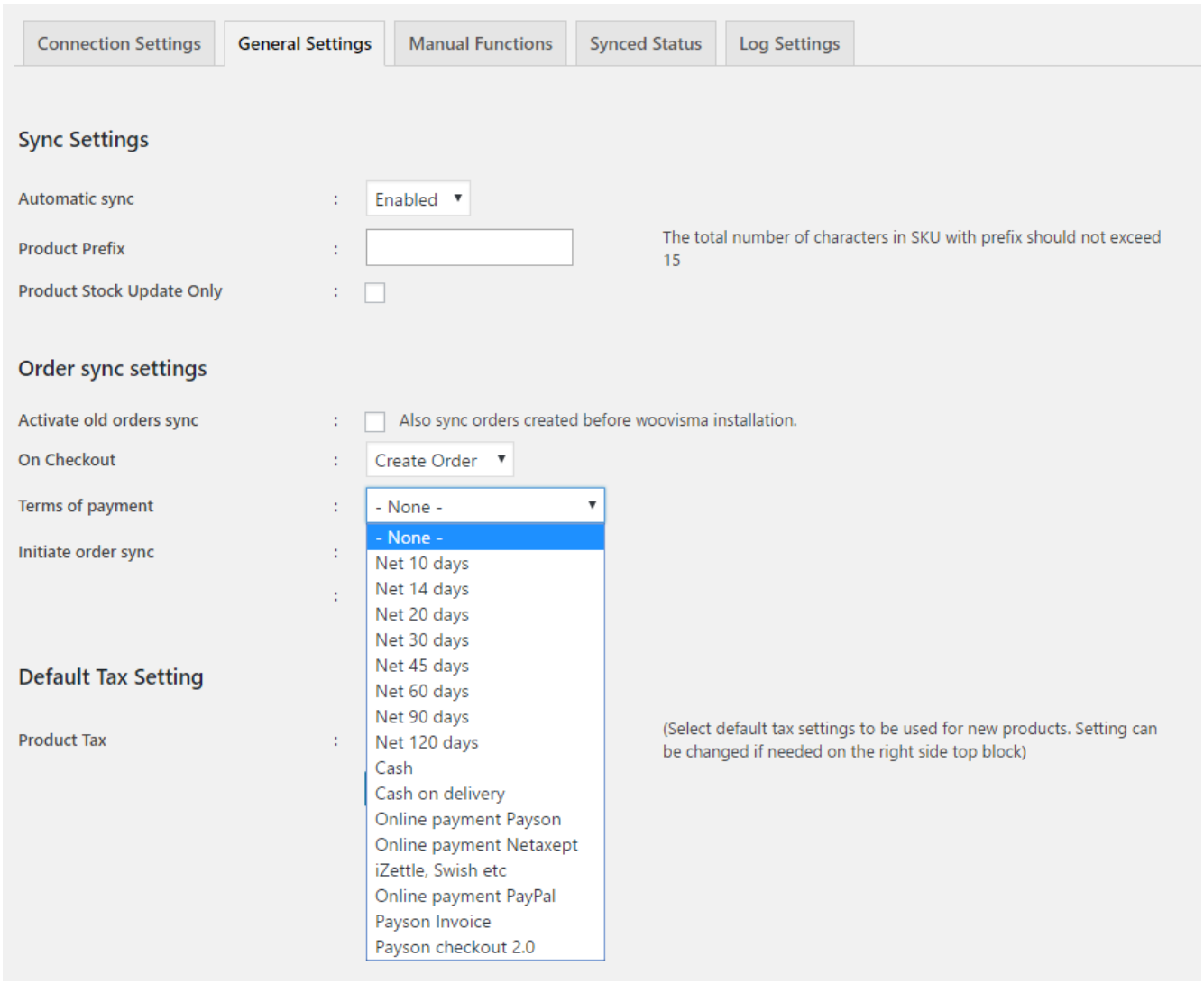
3. Here you can enable “Activate old orders sync” (orders created before woovisma installation) by clicking the "Activate Old Orders Sync " Checkbox under Order Sync Settings.

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.

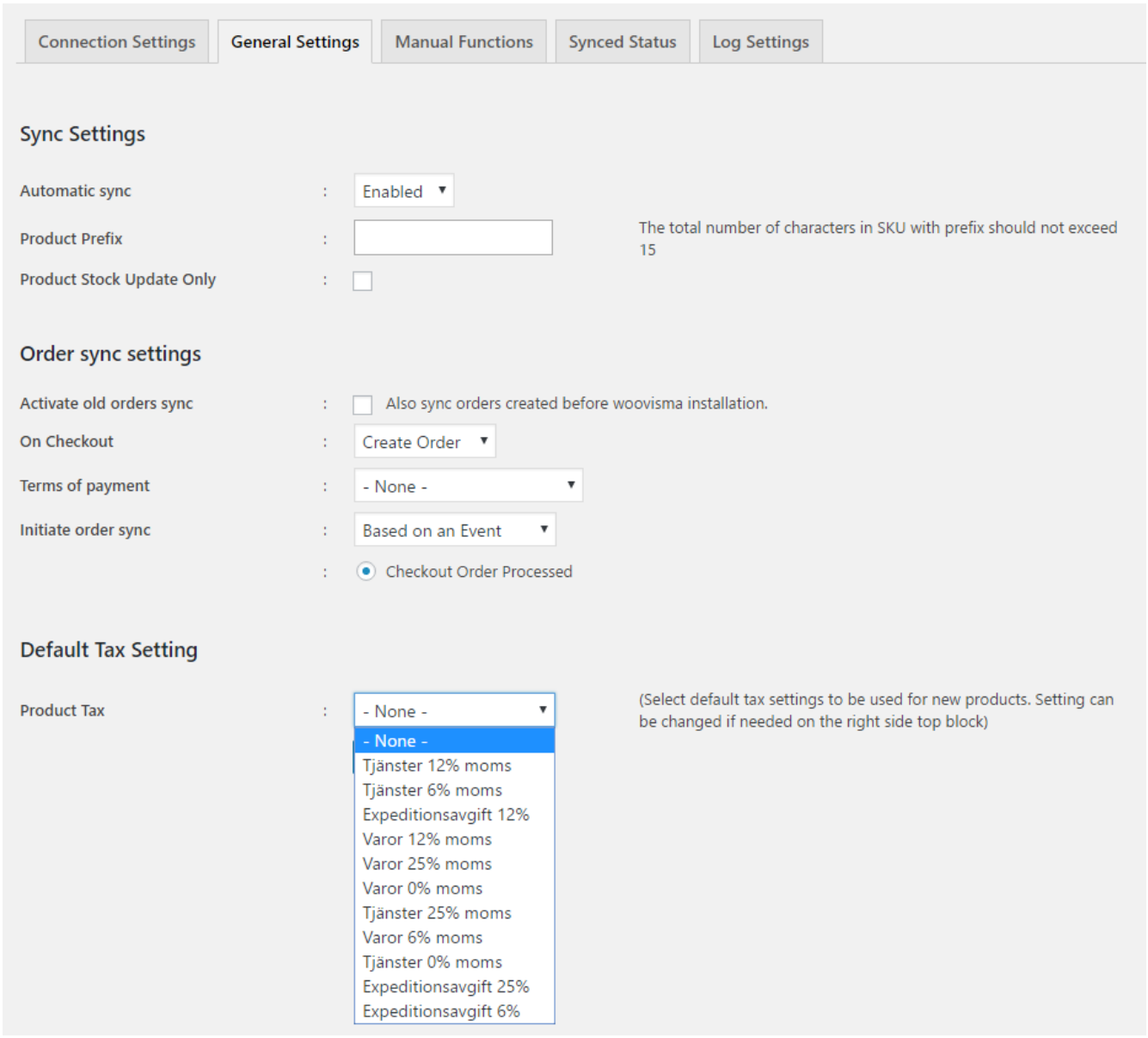
5. Here you can initiate order sync "Based on an Event" or "Based On order status" by Choosing the dropdown from Initiate Order Sync Dropdown under Order Sync Settings.



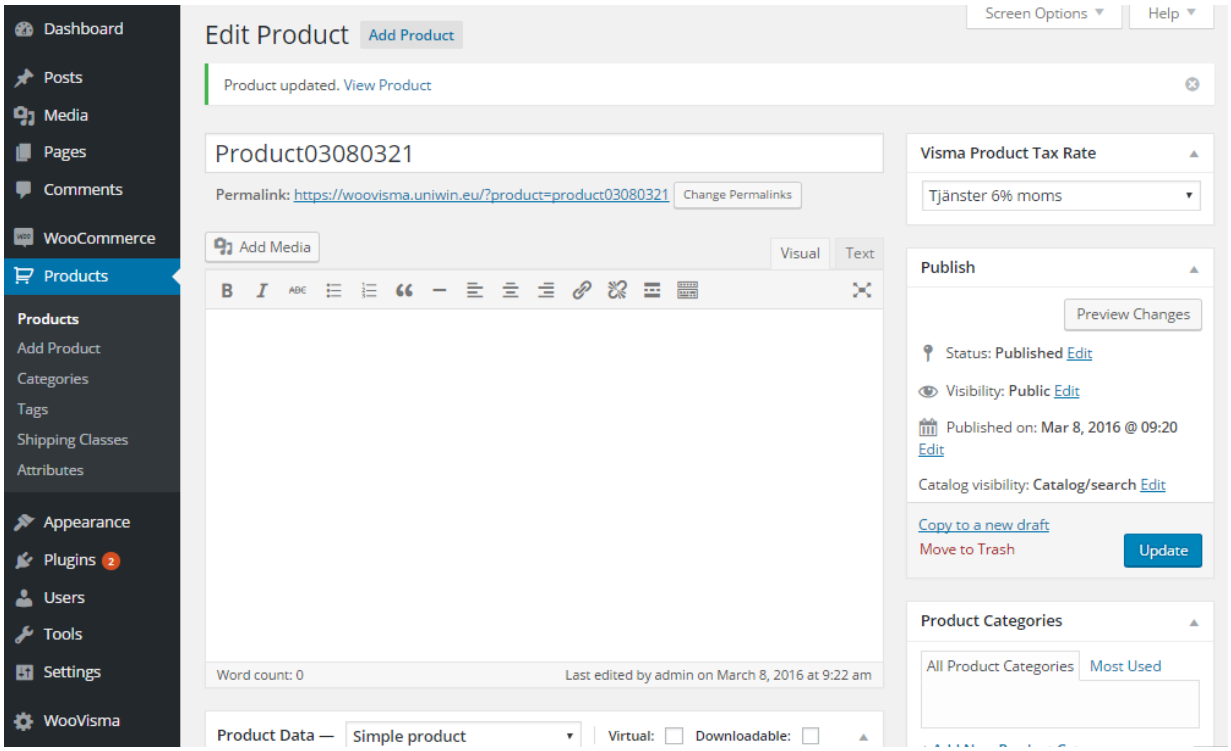
6. Here you can specify terms of payment for your invoices.



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



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.

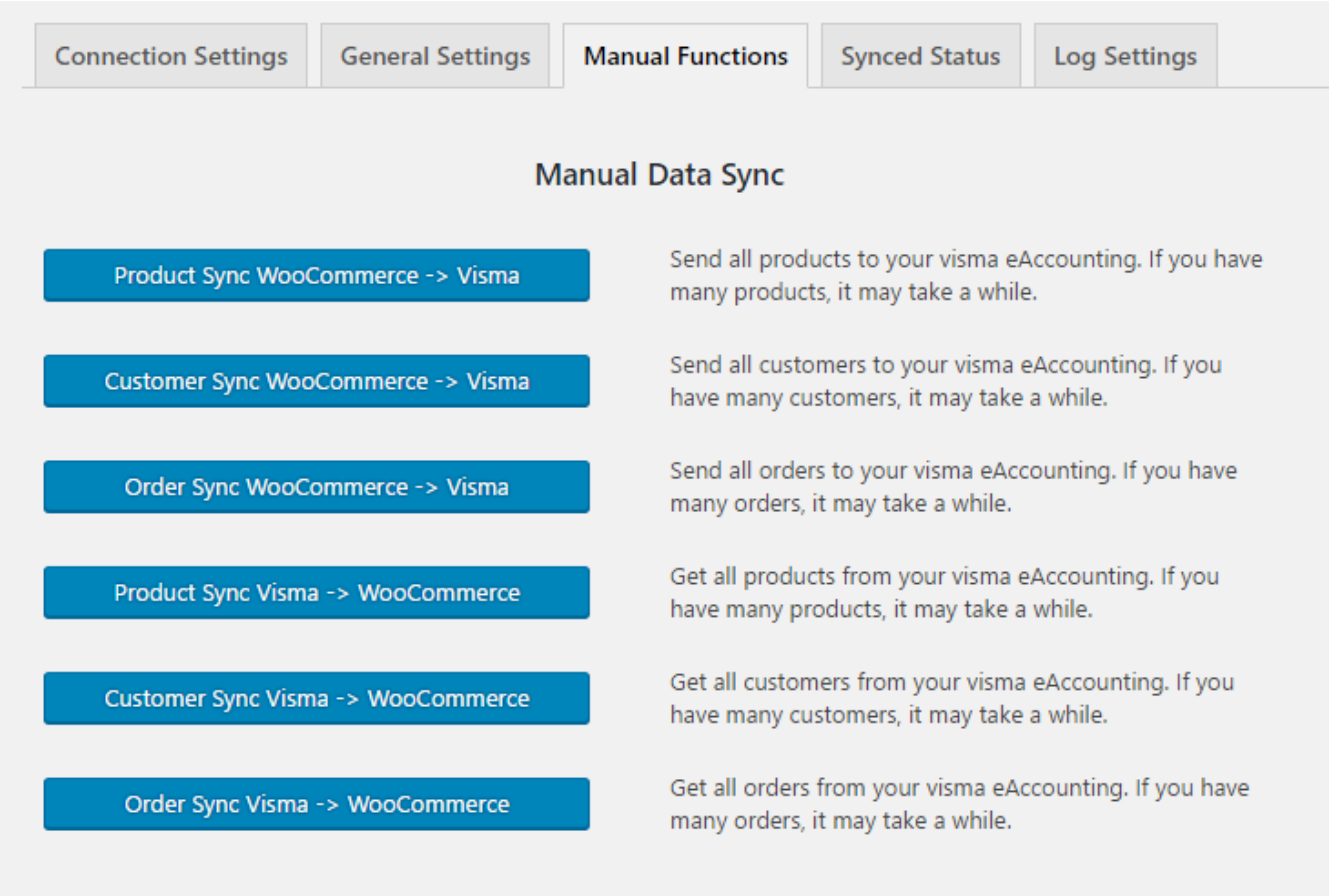
2.Run Product Sync Visma → WooCommerce to sync all your Visma products to WooCommerce.

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.

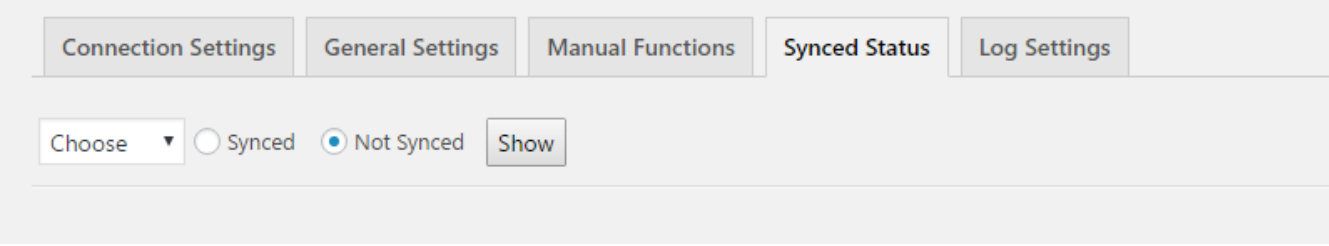
5. Run Order Sync WooCommerce → Visma to sync all your WooCommerce Orders to visma account.

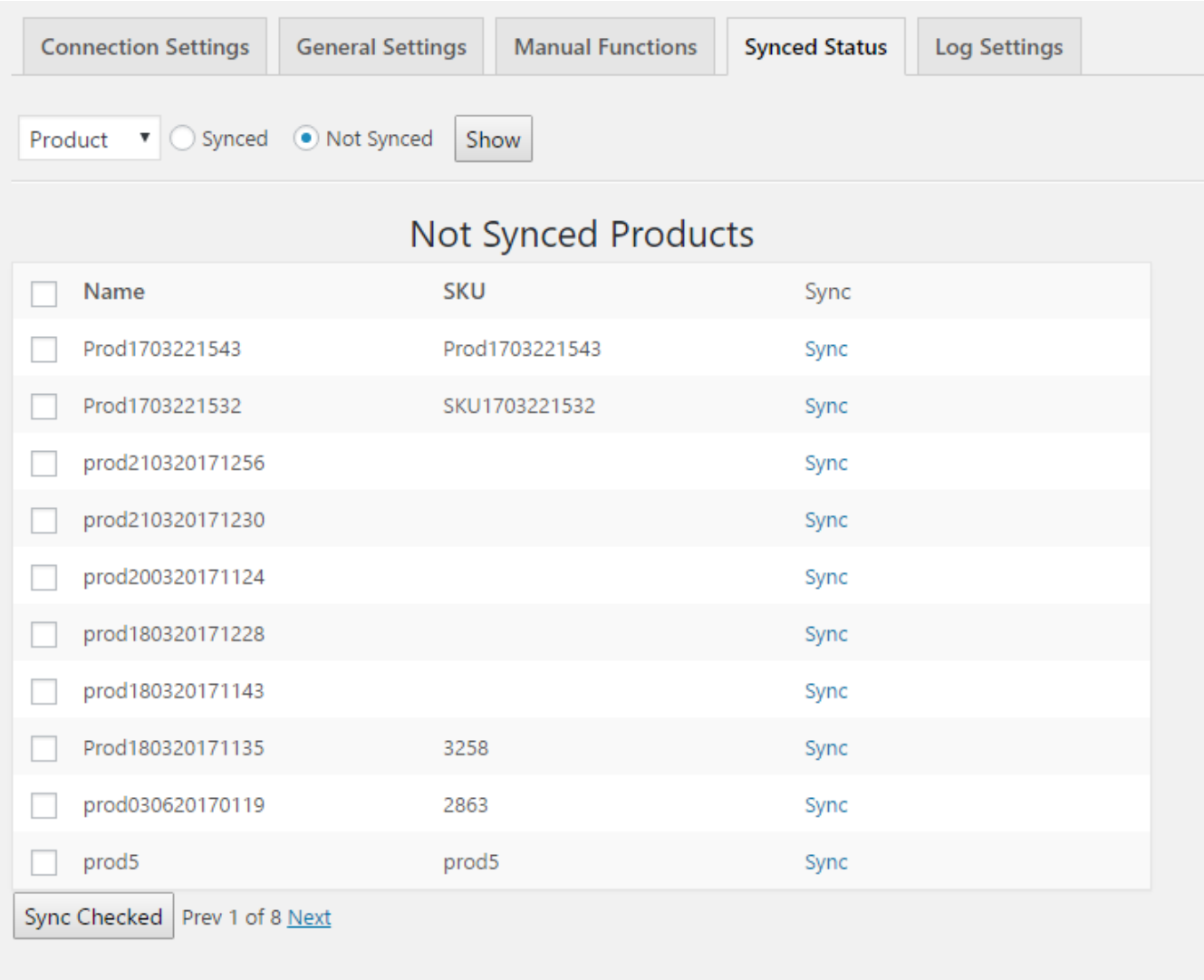
6.Run Order Sync Visma → WooCommerce to sync all your Visma Orders to WooCommerce.



Synced status

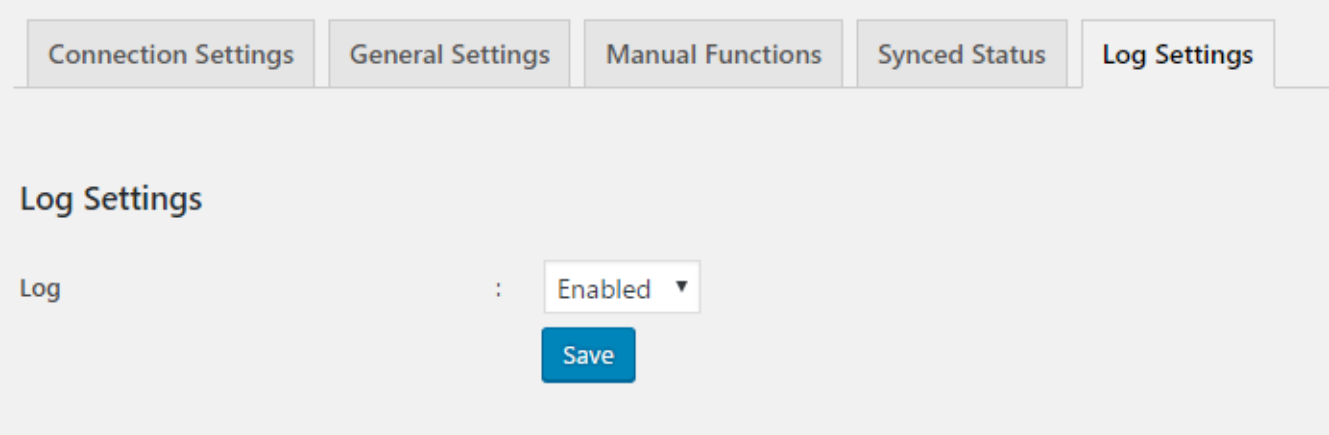
Here you can see synced record details and not synced record details for Product, Customer, Order.
You can sync the Unsynced records by clicking Sync.





Log settings

Choose Enabled option from the log dropdown and click Save.



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 --