Visma Accountview

✅ Available

ⓘ Client Integration - VoIPcube client mandatory

Introduction

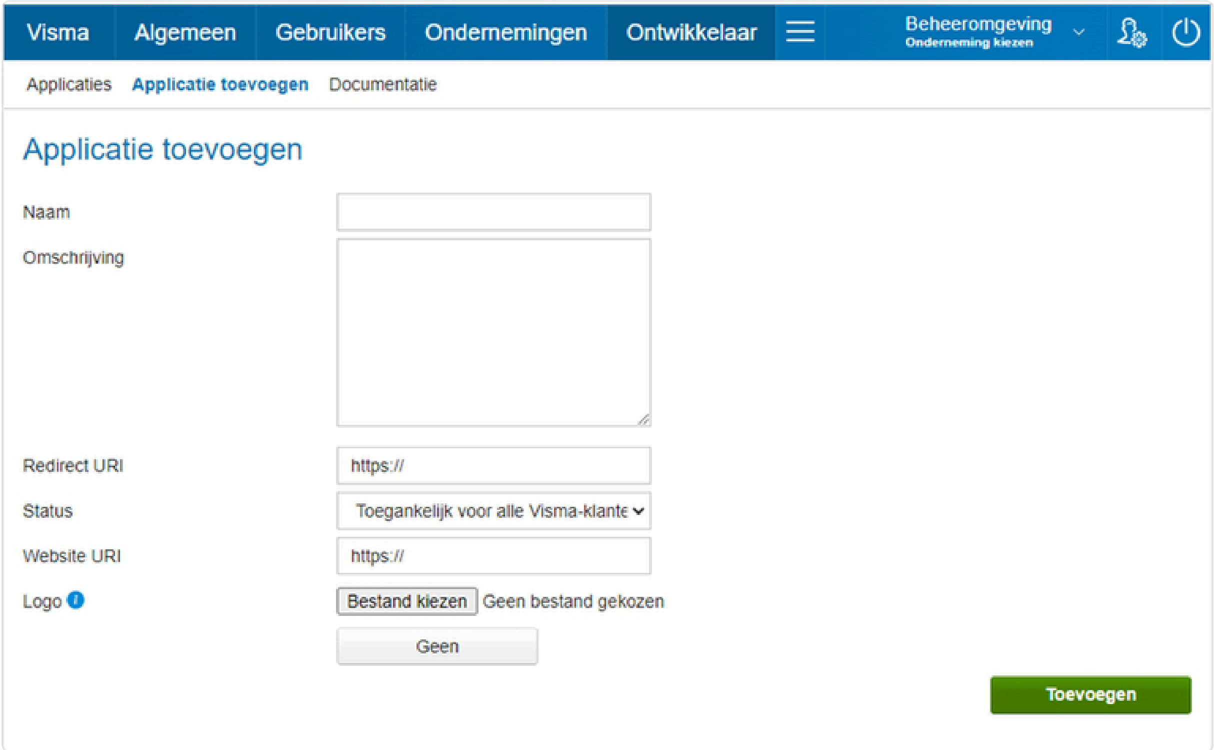
User will get a pop-up on inbound calls with matched records

Configuration

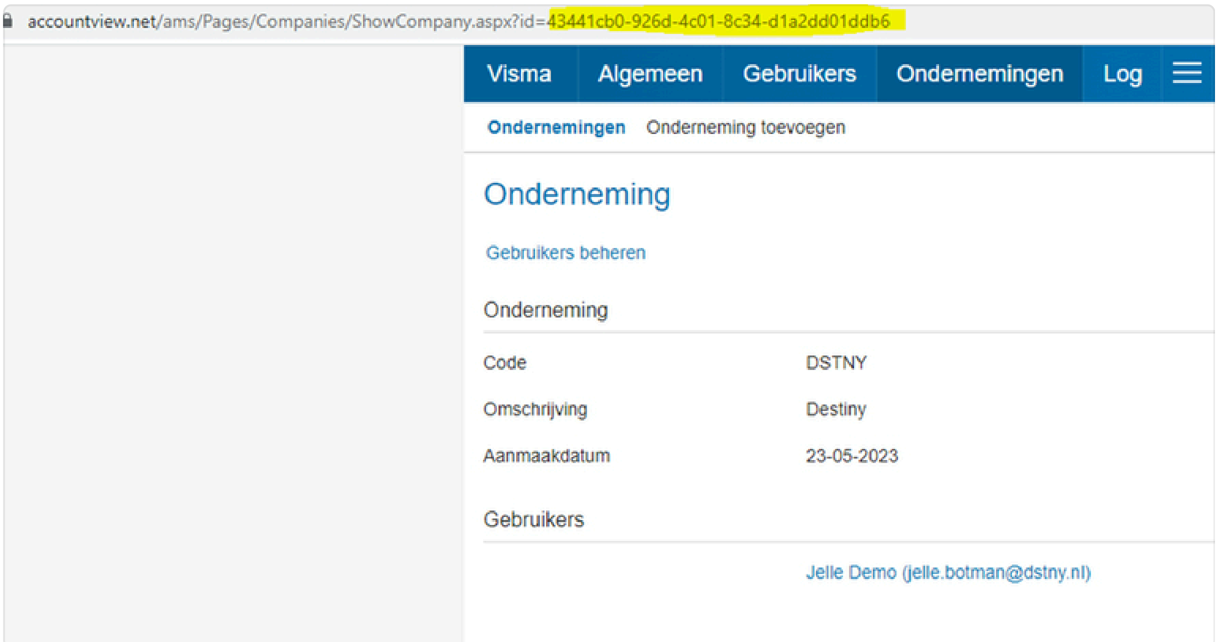
requirements:

- API-sleutel
- API-secret
- Onderneming ID

- Go to Accountview.net and log in as admin
- Go to `ontwikkelinaar` > `Applicatie toevoegen`

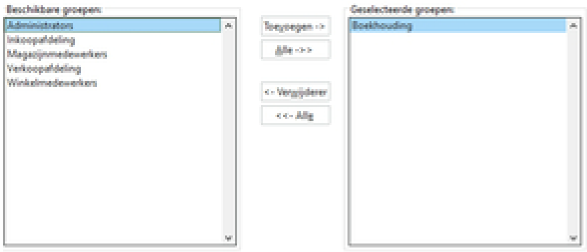


- Enter the form and make sure to set `https://voipcube.nl/authorize` as the `Redirect URL`
- For `status` select `Toegankelijk voor alle Vima-klanten`
- Note down the `API-Key` and `API-Secret`
- Go to the tab `Ondernemingen` and click on the subsidiary for which to setup the integration.
- In the URL you will find the `Onderneming ID`

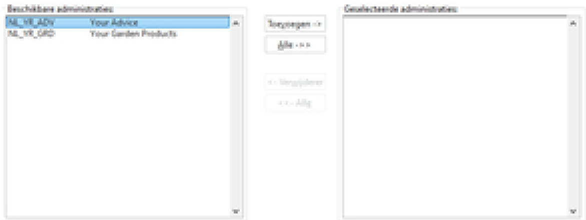


- Log in to the **Desktop client** of **Accountview** (As administrator)

- Go to `Document` > `Stamgeggevens systeem` > `Gebruikers`.
- For each user using the integration do:
  - Select the user which is going to app you are going to use
  - Press F6 to open de stamgegevens
  - Check if an email address is entered. if not enter the same address as their log-in
  - Click OK
  - Go to `Zoeken` > `Accountview.Net-apps`
  - Click `Bewerken` > `Beperkt toegankelijke app toevoegen`
  - Enter the `API-Key` created earlier in the API-key field
  - Click OK
  - Press F6 for the same user
  - Go to `Bewerken` > `Backoffice server-limitatie voor deze gebruiker toestaan`
  - Enter the user password
  - Go to `Gebruikersgroepen`
  - Add the user to the group `Boekhouding`



  - Enter the `Administratie` for the user



  - Click OK
  - To check if the `onderneming` also has access go to `Document` > `Stamgegevens systeem` > `Ondernemingen`
  - Click the onderneming you pick at the earlier step

- Make sure to add the `boekjaar` and uncheck the option `BLK`

Assignment

- Assign the integration and select OAuth2.0 Code Flow. Enter the the `API-key` for ClientID and `API-Secret` as Client Secret.
- Enter the `OndernemingsId` for onderneming
- Assign the integration to users