


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 `ontwikkelaar` > `Applicatie toevoegen`

The screenshot shows the 'Applicatie toevoegen' form with the following fields and values:

- Naam: (empty)
- Omschrijving: (empty)
- Redirect URI: https://
- Status: Toegankelijk voor alle Visma-klante
- Website URI: https://
- Logo: Bestand kiezen (Geen bestand gekozen)

A green 'Toevoegen' button is located at the bottom right of the form.

- 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`

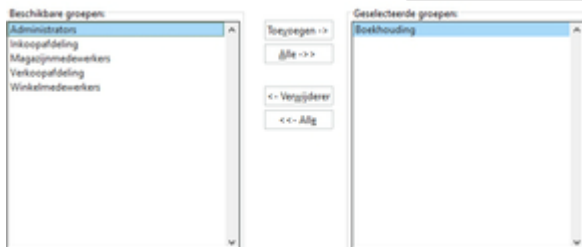
The screenshot shows the 'Onderneming' details page in Accountview. The browser URL is `accountview.net/ams/Pages/Companies/ShowCompany.aspx?id=43441cb0-926d-4c01-8c34-d1a2dd01ddb6`. The page displays the following information:

Onderneming	
Code	DSTNY
Omschrijving	Destiny
Aanmaakdatum	23-05-2023

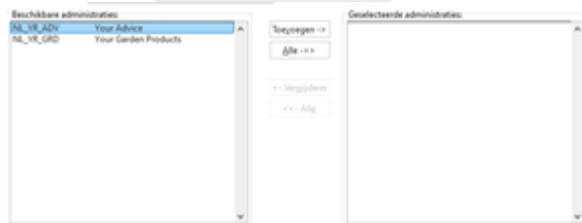
Below the table, there is a section for 'Gebruikers' with the user 'Jelle Demo (jelle.botman@dstny.nl)' listed.

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

- Go to `Document` > `Stamgegevens 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