

Visma.net

INTEGRATION

WEBCRM

Visma.net integration

Overview

The document presents a standardized integration between webCRM and Visma.net.

Description

In order to improve efficiency and implement structure for processes involving existing and new customers, future and historic invoices, contacts, up-to-date items for salespersons to base sales and orders by and general financial and master data for all debtors/customers we have made a user friendly, easily configurable and fast integration to Visma.net's Financial system.

It will ensure not creating the same customers and contact persons in 2 systems as well as ensuring Items are always identical in both systems and gathering all invoice data in webCRM providing the salespeople and manager complete overview of both historic sales, on going sales and future sales, thus having the best of both worlds inside webCRM.

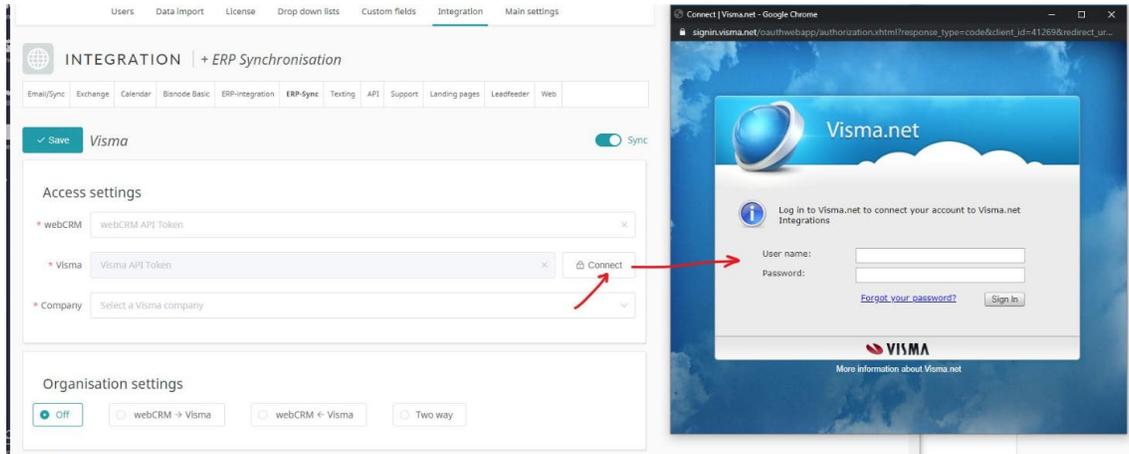
Generally, we see the integration as a fluid improvement of the daily process between sales and financial, so that salespersons can focus on working with sales flows, activities and pipelines and bookkeeping is handled in Visma.net as it should be.

webCRM's Visma.net integration streamlines your sales process by allowing your sales people to create a quote in webCRM, with the latest updated articles and prices from Visma.net, and then automatically send it to Visma.net for invoicing when it is converted to an order. You will also get a better overview of your sales since your customers' invoicing history will automatically be synched from Visma.net to webCRM. You avoid unnecessary entry in the finance department, since the integration means that customer and order information is automatically synchronized from webCRM to Visma.net.

- You avoid unnecessary entry, since the integration means that customer and order information is automatically synchronized
- You will see the complete invoicing history in webCRM and you can easily create reports on it.
- Reassures you that your customer register is always up to date, both in webCRM and Visma.net, and no data is lost

Login

Based on Token access between Visma.net and webCRM.



Configuration

webCRM administrators will be able to setup and configure sync rules and field mapping for available entities between webCRM and Visma.net.

For now, that includes master data from Customers/Debtors, Persons, Orders/Invoices and Items (Quotation lines).

Each entity can be configured individually and even deactivated if irrelevant in the current system.

Organisations

Relevant customer specific data will be configurable for mapping between webCRM and ERP so that relevant field data transferred is user defined for most parts.

The configuration handles the way of data transfer as well meaning that it is possible to choose to synchronize data *one way* or *two way*.

Organisation settings

Off webCRM → ERP webCRM ← ERP Two way

Sync only organisations of type:

Set type for ERP customers:

Number	<input type="text" value="Select"/>	
Name	Name	
Address Line 1	Address	x
Postal Code	Post code/ZIP	x
City	City	x
Phone 1	Telephone	x
Tax Zone	VAT group	x
Select	Select	+

Synchronization is as standard initiated from webCRM by setting Organisation type to = Customer.

This is custom as well.

Organisation navn	Kunde A/S	Obs-tekst	
Divisionsnavn		Hjemmeside	
Telefon	20304010	E-mail domæne	
Kommentar		GPS koordinater	
<div style="border: 1px solid #ccc; height: 60px;"></div>		P-nr.	
Fortnox-information			
Ansvarlig	Thomas Pierog	Debitor nr.	987654321
2. ansvarlig	--- Ingen---	CVR nr.	123456789
Område	1: -- vælg --	EAN	3128479158
Type	Kunde	Betalingsbetingelser	Standard
Status	-- vælg --	Foretrukken Valuta	DKK
Branche	-- vælg --	Debitorgruppe	1
Adresse	Kundeadresse 199	Dokumenter + Klik for at vælge en fil eller træk den ind i feltet	
Postnummer	1999		
<small>Klik gem for at opdatere By fra nyt postnummer</small>			
By	Store Debitor		

Persons

Relevant person data will be synchronized between the systems – again – based on defined *way of synchronization*.

Generally, data mapped will be Name, and e-mail, but other data will be available as well. Transfer from webCRM will be based on a checkbox defining *if relevant for ERP* and transfer from ERP will be all contacts identified by email address.

Fornavn	Carsten		
Efternavn	Fortnox		
Status	Aktiv		
E-mail	reference@fortnox.se		
	<input type="checkbox"/> Bloker masse-e-mails		
Skype			
Jobtitel	CFO		
Fødselsdag	31-03-1970		
Interesser	<input type="checkbox"/> Fodbold		
	<input type="checkbox"/> Musik		
	<input type="checkbox"/> Sejlsport		
	<input checked="" type="checkbox"/> Golf		
	<input type="checkbox"/> Andet		
Jobfunktioner	Direktion		
Fortnox-information			
Kontakt-ID	1425		
	<input checked="" type="checkbox"/> Er nøgleperson		
Dokumenter			
Klik for at vælge en fil eller træk den ind i feltet			

Items

Will always be synchronized FROM ERP to webCRM as ERP is seen as master for this type of data and all new Items or Item changes are handled and maintained in the ERP.

Item line information can be customized based on needs.

The Item register is maintained in Visma.net and automatically synched to webCRM. Data that is sent to webCRM normally are are:

- Item id
- Item name
- Unit
- Cost price
- List price

Tryk på pennen for at oprette ordre linjer

Varer overføres automatisk. Vælg det eller de produkter som ordren omhandler i drop-down boksene - enten ud fra varenummer eller efter varetekst.

Orders

Relevant data will be synchronized between the systems as well as Item lines (quotation lines) from the Order. Data synchronization is customizable, and data can be synchronized *one way* or *two way*.

Opportunities in webCRM converted into Orders (Deliveries) are automatically synchronized with ERP either as a Sales Order or Invoice (this can be named differently dependent on the ERP-system) just as Orders created directly are.

What area the Order is synchronized to in the ERP system can be manually setup to typically either Sales Order or Invoice.

Below is the standard data fields being synced in addition to Item lines:

Order

- Order number (only from Visma.net)
- Order date
- Delivery Date
- Invoice number (only from Visma.net)
- Invoice date (only from Visma.net)
- Invoice booked

Invoice

- Invoice number (only from Visma.net)
- Invoice date (only from Visma.net)
- Invoice booked

NOTE! The company must be labeled with the correct Type (see above under “Customers”) in webCRM, otherwise, Deliveries and Orders/Invoices will not be synched between webCRM and Visma.net.

Delivery settings

Off
 webCRM → ERP
 webCRM ← ERP
 Two way

webCRM Delivery → Sales Order

webCRM Delivery → Order Type: SO

webCRM Delivery ← Order & Invoice

webCRM Delivery ← Order Types: SO IN

Reference Nbr.	Select	
Order Type	Select	
Order Nbr.	Number	
Description	Description	x
Date	DeliveryOrderDate	x
Select	Select	+

All invoices in the ERP will be transferred to webCRM containing relevant data.

webCRM will further update status of Invoices when changes happen such as *awaiting, cancelled, approved* and show the status directly on the order in webCRM

Kommentar
Tilbud 2.linje

Accounts 1030 (Patent) ▼

Varegruppe --- Alle --- ▼

Varenummer 10 ▼

Varenavn Produkt 1 ▼

Beskrivelse

Listepris / Kostpris 0,00 / 0,00

Pris 500,00 🔍

Mængde 1,00

Rabat 0,00

Moms 0,00 %

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✓ Gem

Varenummer	Varenavn	Accounts	Beskrivelse	Kostpris	Listepris	Pris	Mængde	Total
✖ ✎ 10	Produkt 1	1030 (Patent)		0,00	0,00	500,00	1,00	500,00
								Total: 500,00
								Moms: 0,00
								Total inkl. moms: 500,00
								Total kostpris: 0,00
								DB: 500,00
								DB %: 100

If you have any questions, please contact your local webCRM support.

Sincerely,
webCRM