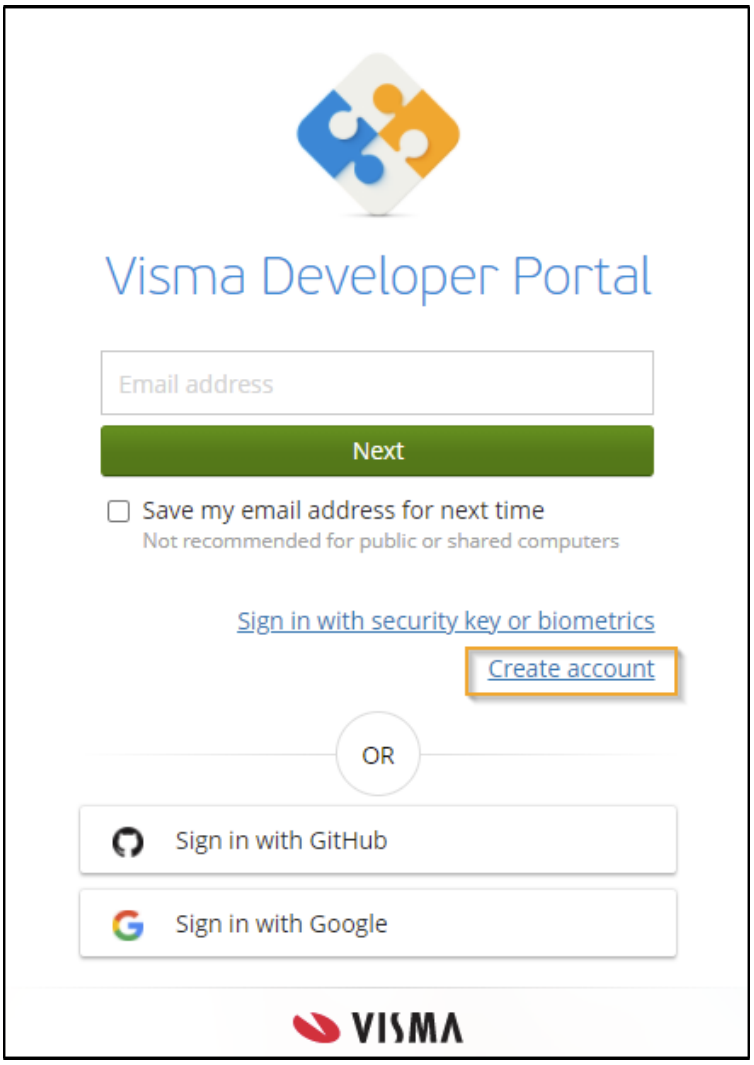
# Getting started with Visma Developer Portal

This article is intended to provide you with guidance of managing your Visma Developer Portal & Visma App Store accounts.

# Step 1: Create your Developer Portal Account

## **1.1** Go to the Visma Developer Portal Account creation page



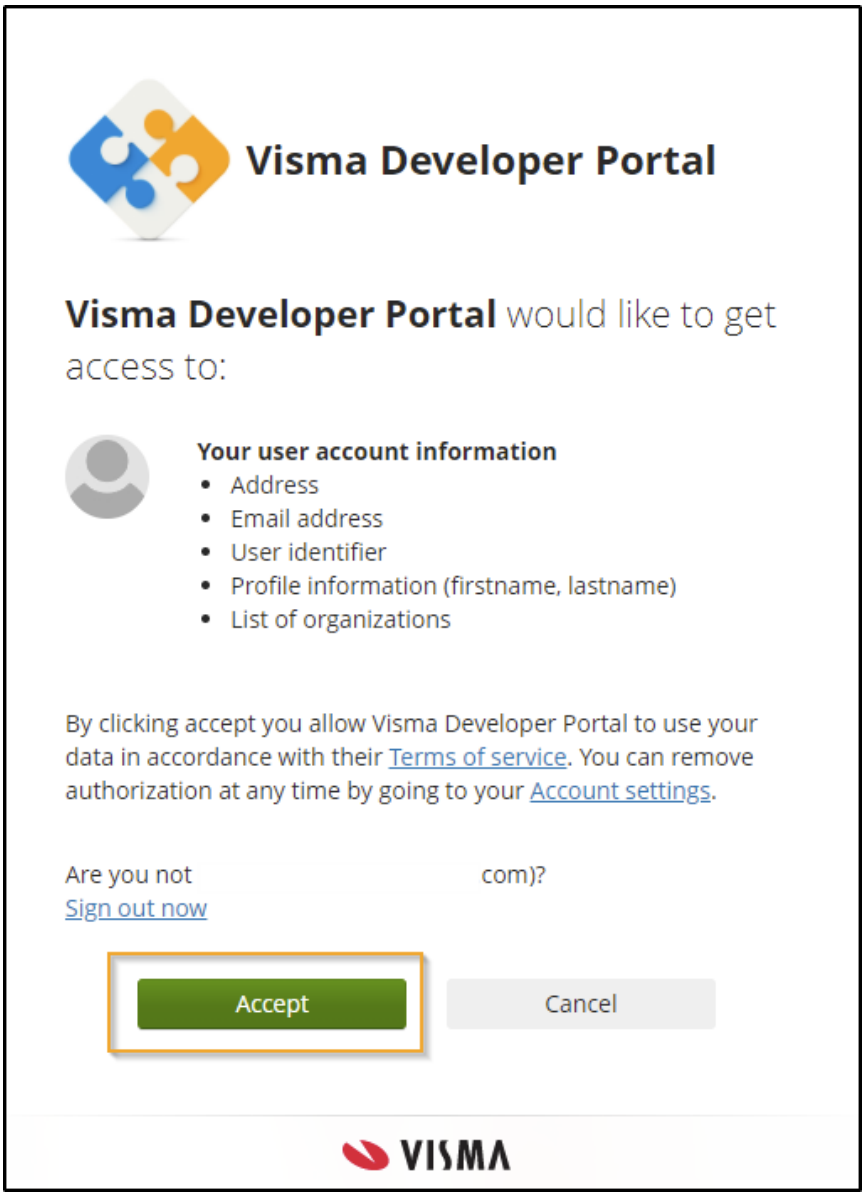

Click on the "Create Account"

Follow the steps on the screen to set up your account.

You can also sign in with either your GitHub or Google Account.

If you already have an account, please log in by clicking on the "Next" after entering your email address, then enter your password to "Sign in"

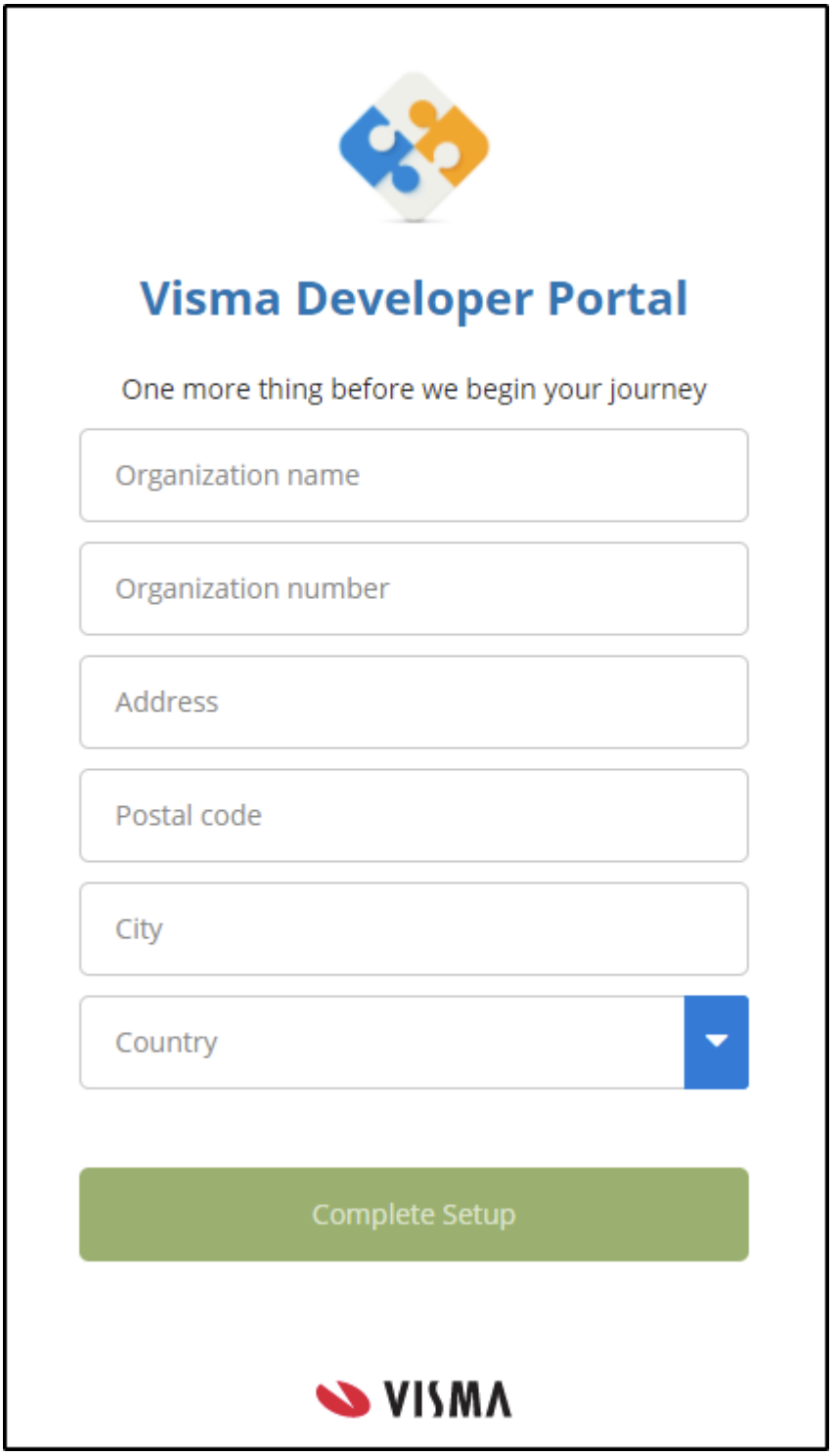
## 1.2 Grant access to your account




Click on the "Accept" to continue.

Then you'll be asked to enter your organization details in the next page.

## 1.3 Enter your organization details

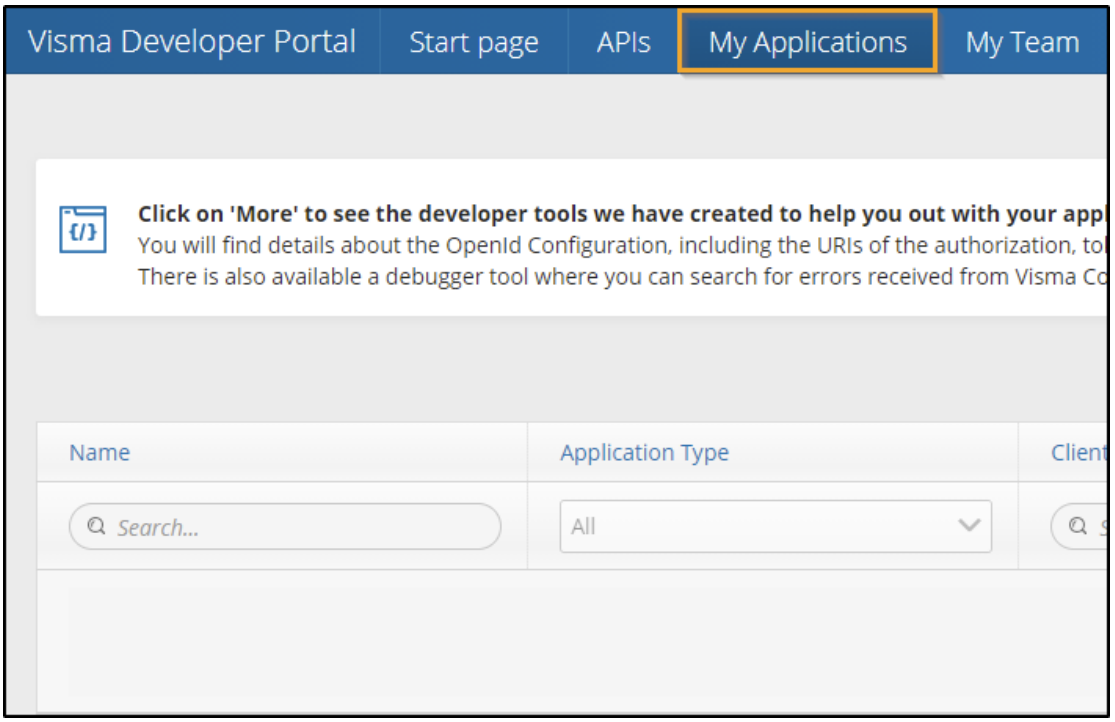



Enter the relevant information and click on the "Complete Setup" to continue.

After completing the on-boarding process, you will be redirected to the Visma Developer Portal start page. This page contains shortcuts for different functionalities of the Portal.

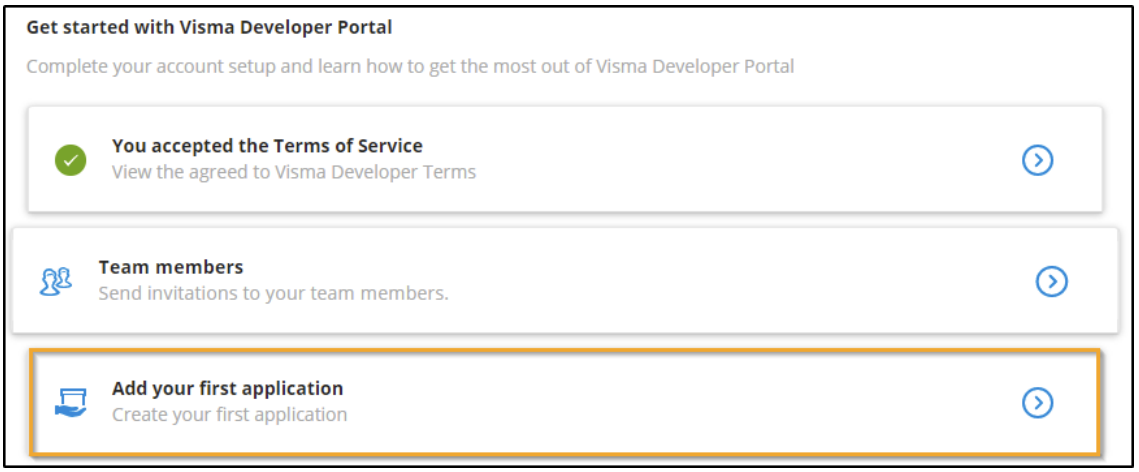
# **Step 2:** Create Your Application

All your applications are displayed under "My Applications" page. You can create, update and delete your applications from this page.

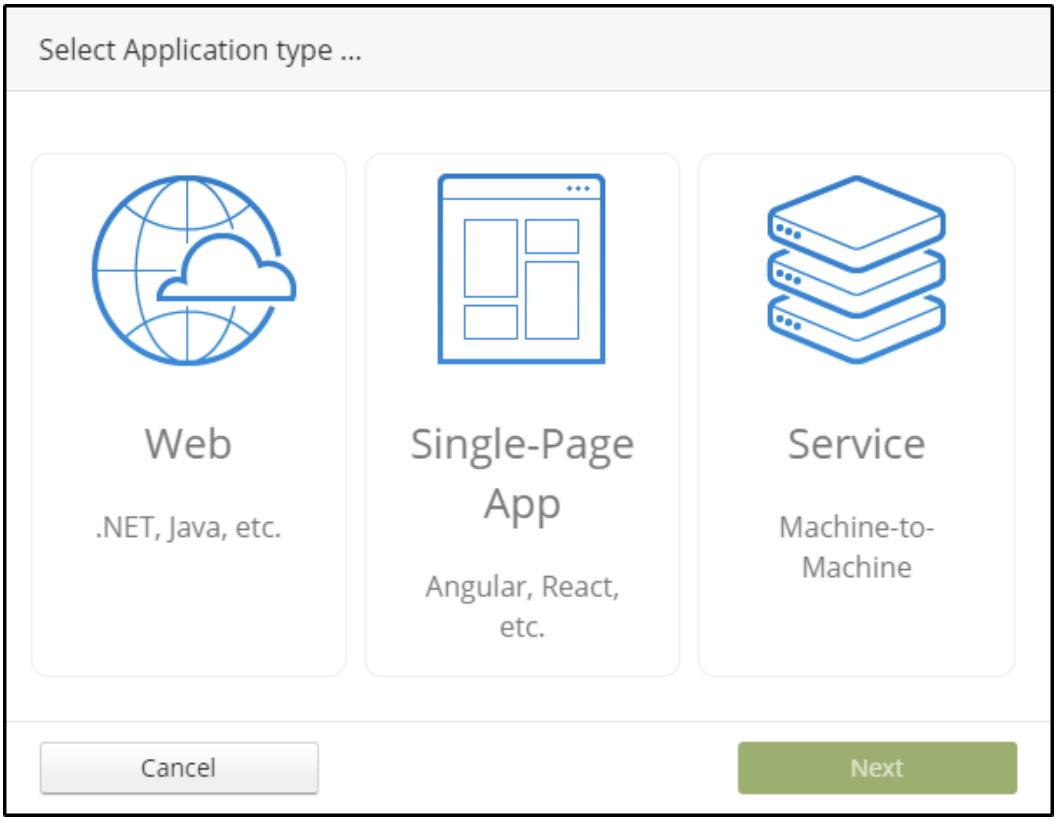



Click on the "Add Application" button located on the right side of the "My Applications "page. 


There's also a shortcut in the "Start Page" that can be used to trigger registration of a new application.



## 2.1 Choose your application type



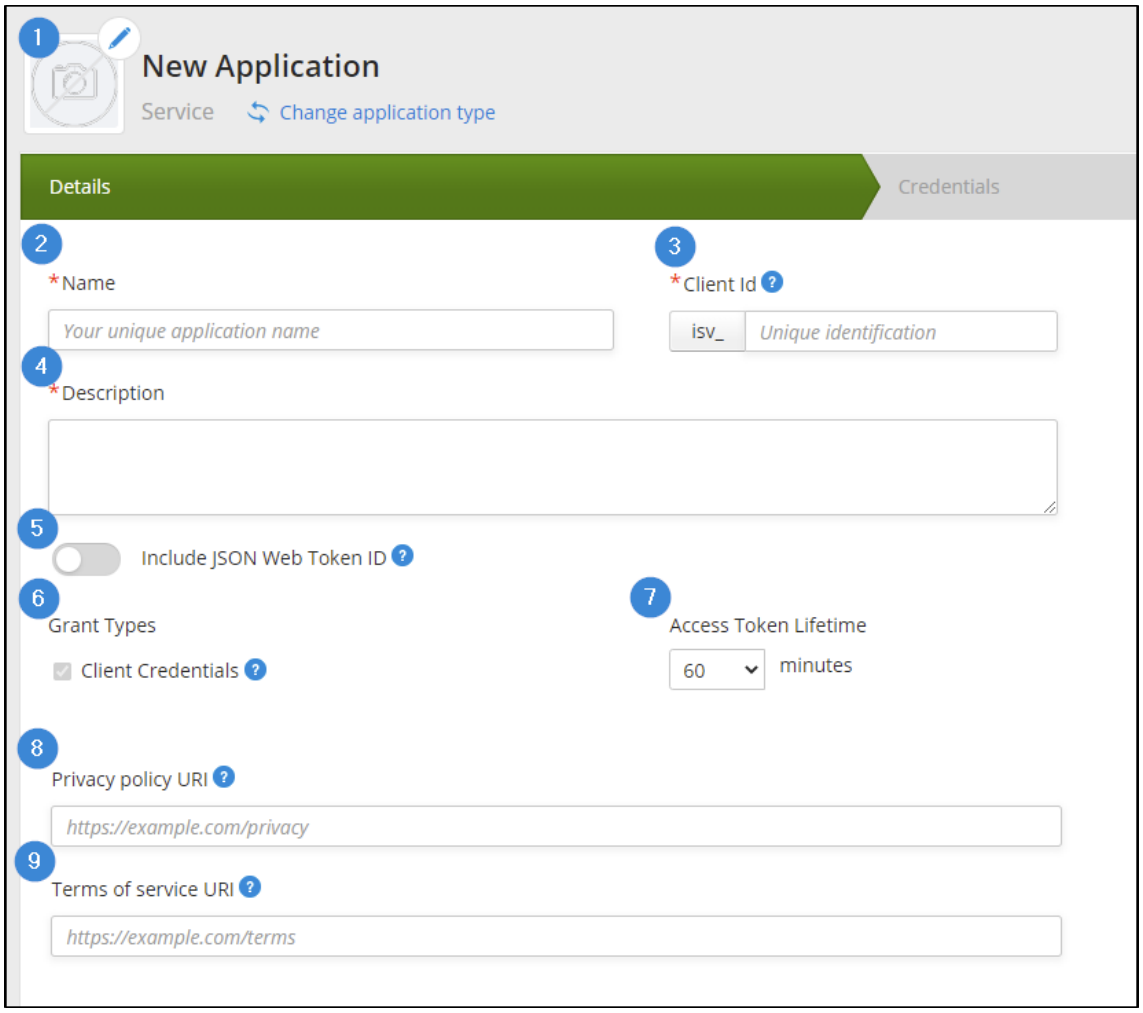

| Client Type | Description |
|---|---|
| Web | Application which runs on a web server.<br>These applications are considered **confidential** since they can maintain the confidentiality of its secret(s) and tokens.<br><br>A web application can be configured with different OAuth 2.0 grant types:<br><br>● Authorization_code<br><br>● client_credentials, typical machine-to-machine use case<br><br>● refresh_token, for applications configured with offline access |

| | |
|---|---|
| Single-Page App | Single-page apps (or browser-based apps) run entirely in the browser after loading the JavaScript and HTML source code from a web page. These applications are considered **public**, and no secrets are issued to them.<br><br>SPA applications use authorization_code grant type with Proof of Key for Code Exchange (PKCE) extension. |
| Service | Application which runs on a server or on customer's premise. These applications are considered **confidential**.<br><br>These applications are usually used in a "backend" machine-to-machine integration. |

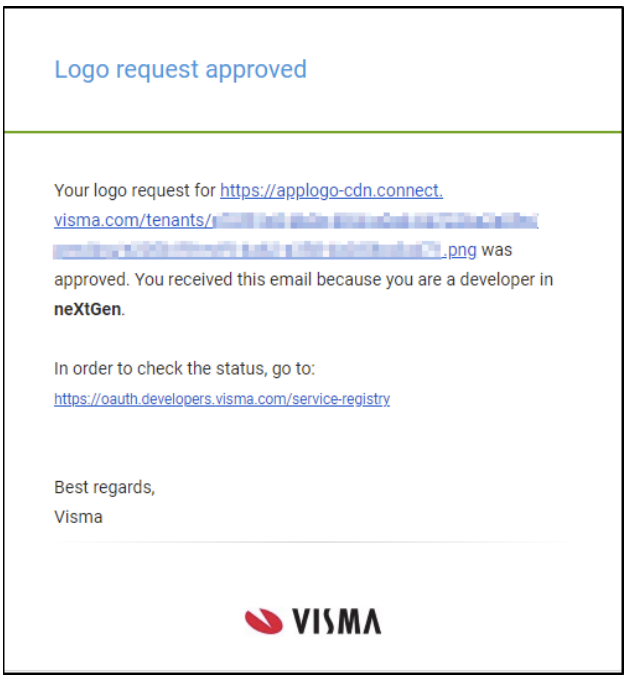
## 2.2 Enter the relevant information of your application

In this example, we'll be creating a "Service" type of application.

The "**Name**" of the application and "**Client ID**" are unique in the Visma Developer Portal



1) Upload a logo for your application
    a) The uploaded logo needs to be **approved** by the "Visma" before being available to applications. This is mandatory for the applications that are to be published in the Visma App Store.
    b) Once the logo has been approved, you'll receive an email from do.not.reply@oauth.developers.visma.com, informing you that.


Logo request approved

Your logo request for https://applogo-cdn.connect.visma.com/tenants/[redacted].png was approved. You received this email because you are a developer in **neXtGen**.

In order to check the status, go to:
https://oauth.developers.visma.com/service-registry

Best regards,
Visma

VISMA

2) Enter a unique application name
3) Enter a Client_ID
4) Enter an Application description
5) "Include JSON Web Token ID
    a) Unique identifier - Can be used to prevent the JWT from being replaced (e.g. allow a token to be used only once)
6) Grant Type: Client Credentials
7) Access Token Lifetime: Tokens are issued with an expiration time
8) Privacy policy URI of your application
    a) URL string that points to a human-readable "privacy policy" document that describes how the deployment organization collects, uses, retains, and discloses personal data. This is mandatory for applications that are to be published in the Visma App Store.

9) Terms of service URI of your application

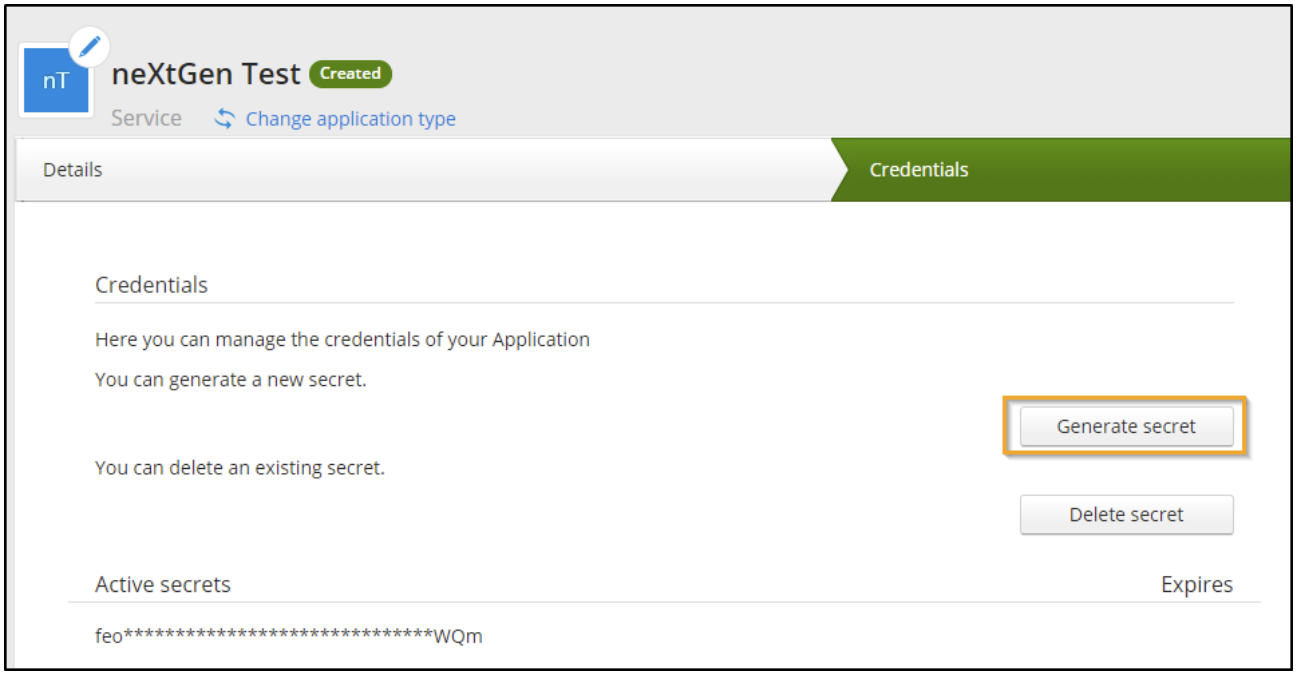
a) URL string that points to a human-readable "terms of service" document for the client that describes a contractual relationship between the end-user and the client that the end-user accepts when authorizing the client. This is mandatory for applications that are to be published in the Visma App Store.

Once the application is "**Saved**" > "**Created**" then you can "**Publish**" it to the Visma App Store. (After Approvals Logo & Integration)

## 2.3 Get your Client Secret

Client secrets are only needed for **Web** and **Service** type applications.

You can manage the application secrets from the "**Credentials tab**". By default, we don't generate a secret for applications after publish.




To create a secret for your application, click on the "**Generate Secret**" button. Once generated, the secret will be displayed. You have to copy the secret, since it will not be available afterwards. Currently, an application can have multiple "Secrets".


To be able to delete a secret, you need to write the secret that you've generated before.

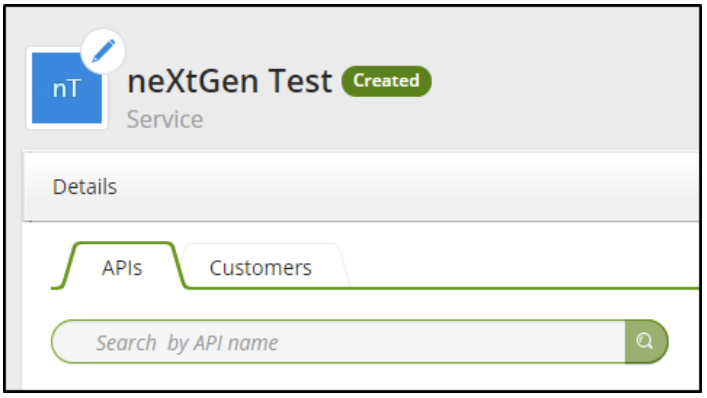

Click "Next".

## 2.4 Add an API Integration

API integration setup is optional. You do not require to add an API integration if your application is only using Sign in with Visma functionality.

Once you have "**created**" your application and obtained a "secret" for it, the next step is to configure the integration with an API.

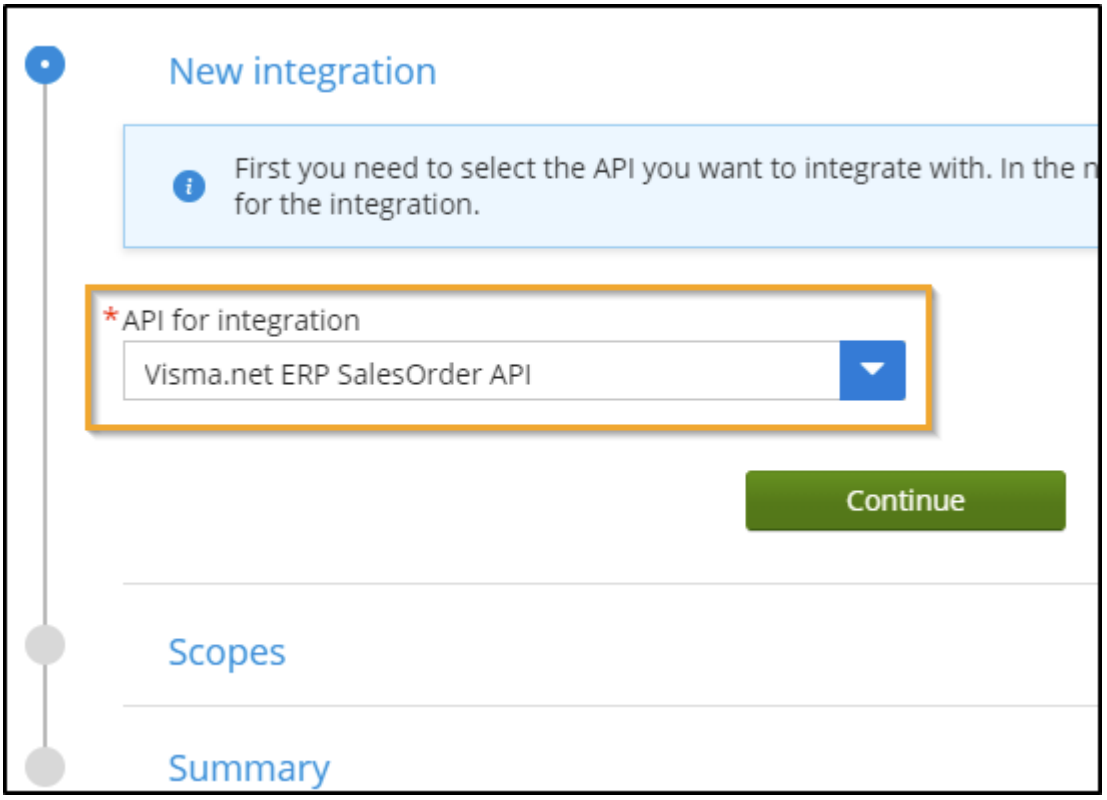
The list of available APIs can be found under the **"APIs"** page. Each API has its own details page that provides additional information: Name, Base URL, Documentation, Permission type and Permissions (OAuth Scopes). Integration with the API can be triggered directly from this page.



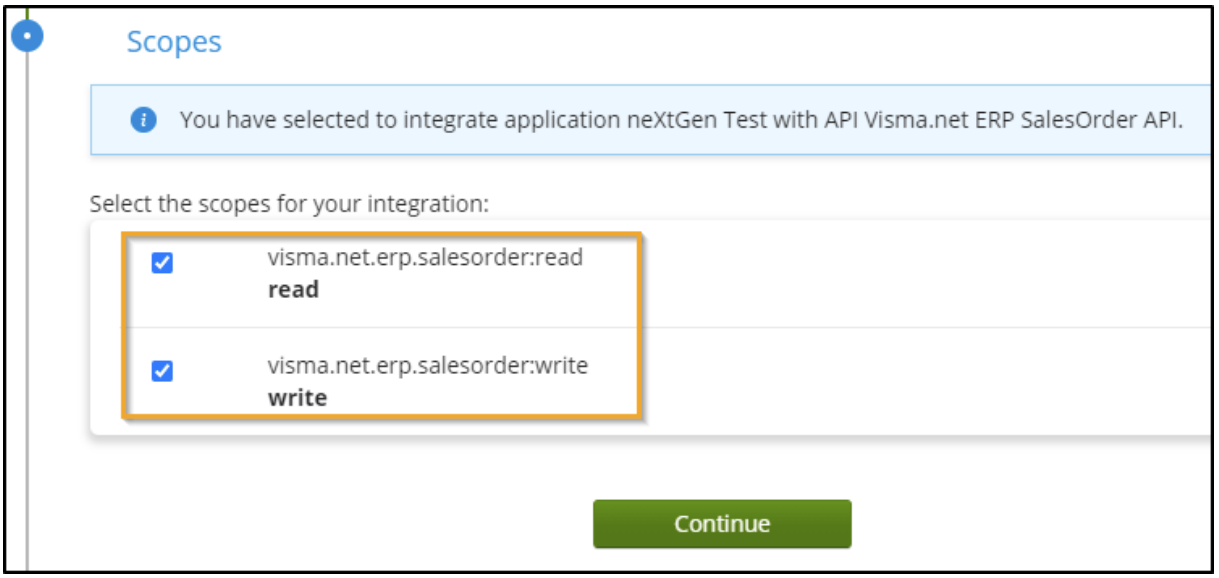
Click on the “New Integration” button


**1)** Choose one of your application(s) for which the integration is configured.
(In this example, we’ll be using “**Visma.net ERP SalesOrder API**“)

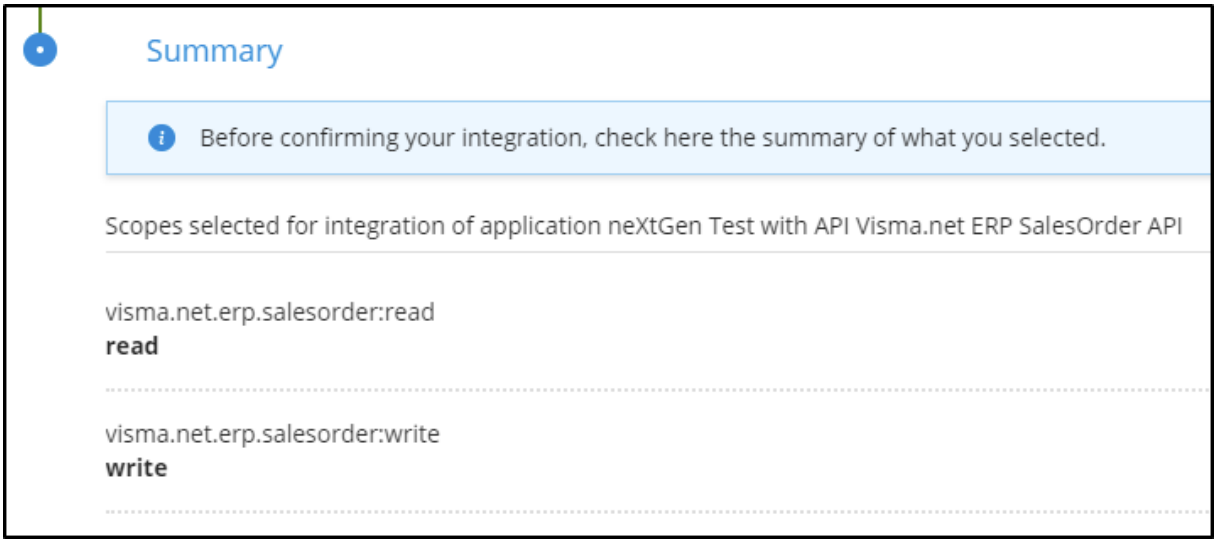
First, you need to select the API you want to integrate with. In the next step, you can also select the scopes for the integration.



**2)** Select the API permission(s) that your application needs.



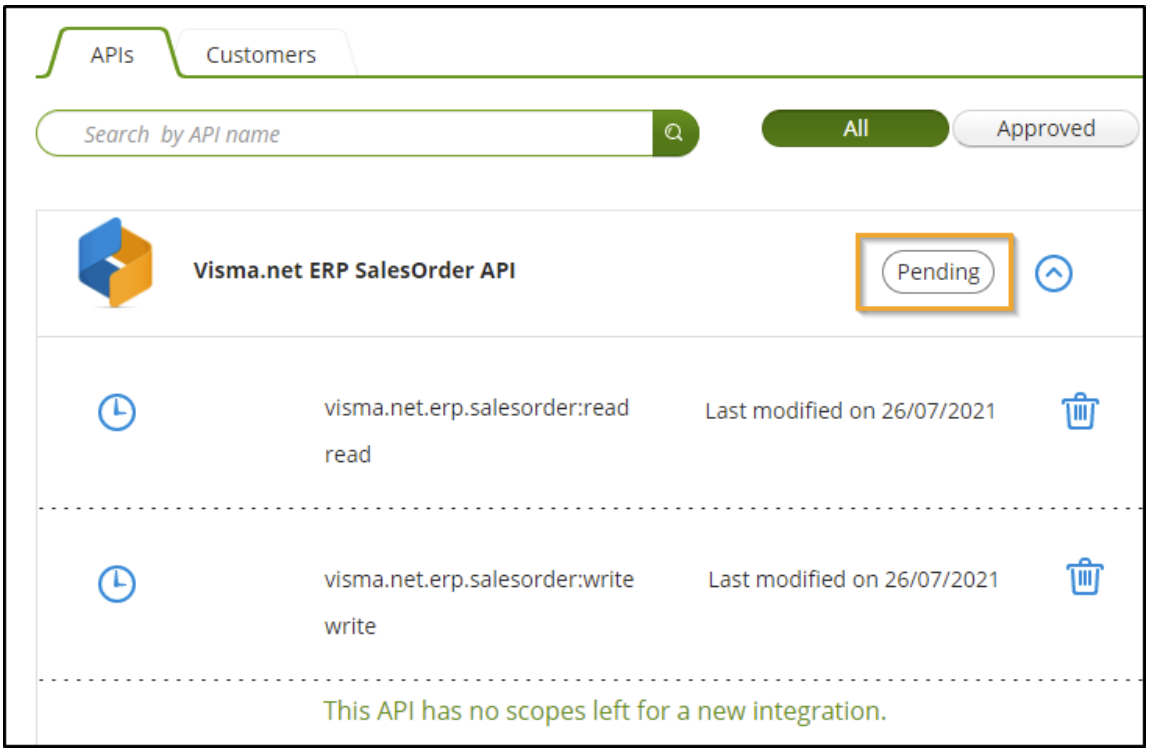

**3)** Confirm the integration request



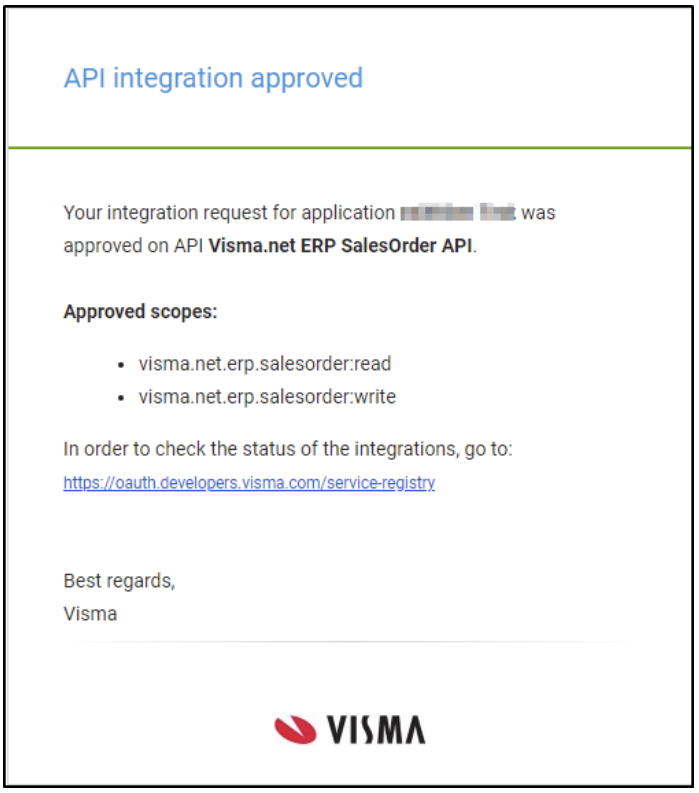

Click on the Confirm Integration button.

Depending on the API configuration, scopes will be added automatically to your application, or will **go through an approval process**.

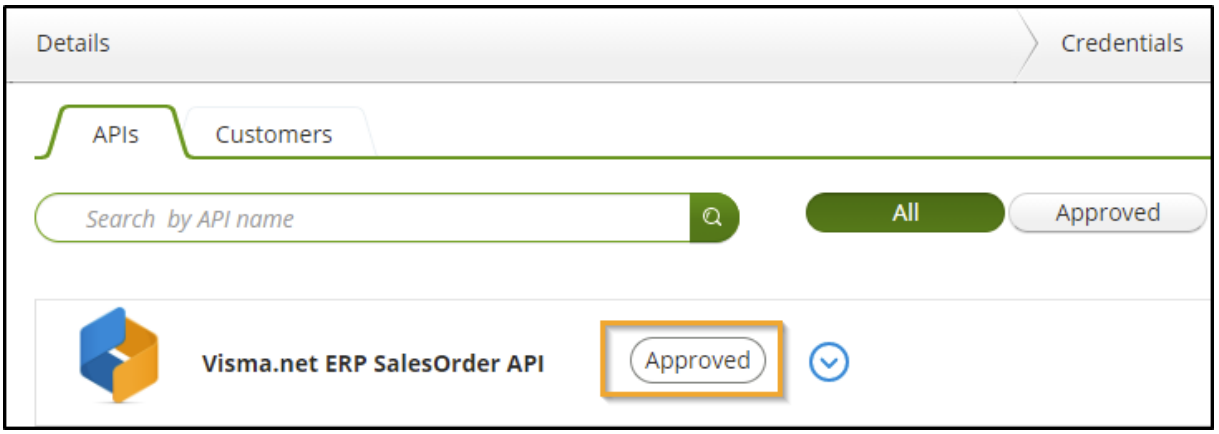
The Status of each integration can be checked under application's Integrations tab.




**4)** A notification will be sent to the "Visma.net ERP SalesOrder API Service" team and once the integration has been **approved**, you'll receive an email from do.not.reply@oauth.developers.visma.com, indicating that your application has been approved.



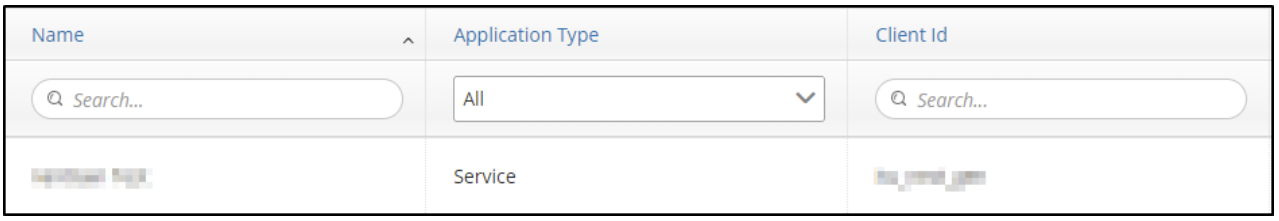
After that, the application can be published to the Visma App Store.

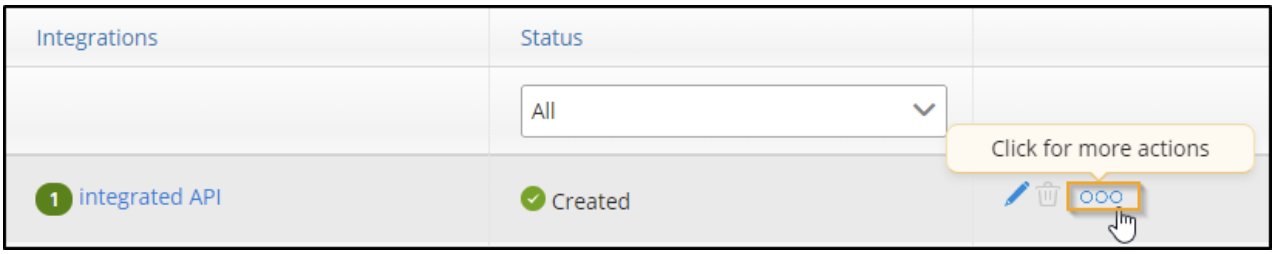



## 2.5 Publish your Application to the Visma App Store

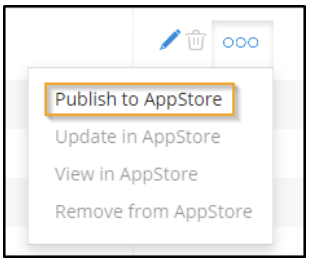
**1)** Go to the "**My Applications**" page


Find your application and click on the button.

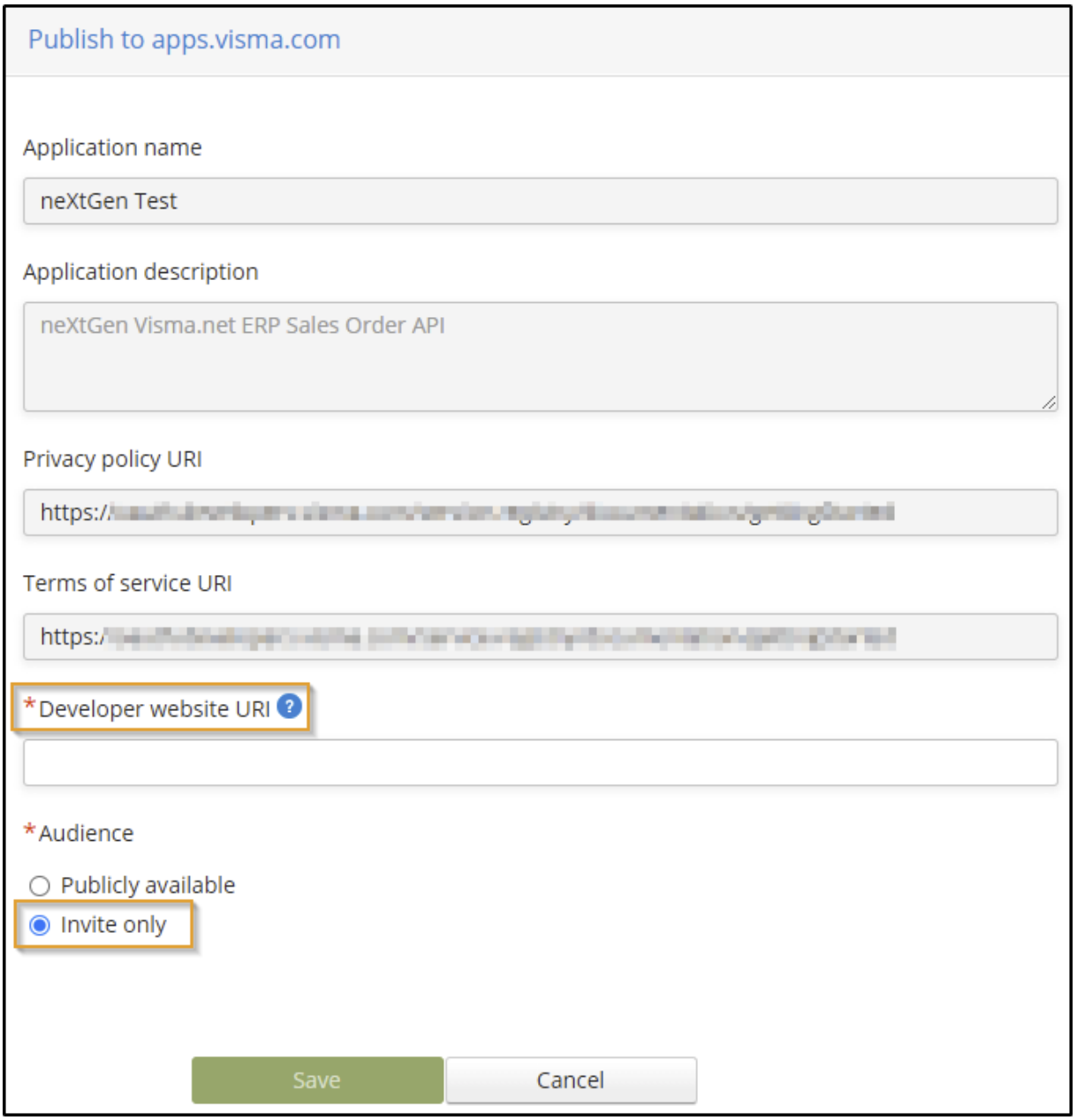



**1.1)** Click on the "Publish to AppStore"



**2)** Enter the relevant information in the "Publish to Apps.Visma.com" screen.

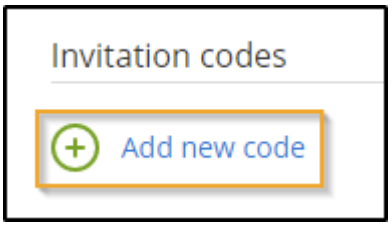



- Developer website URI: URL string that points to a human-readable document describing the application or your organization.
- Audience: Determines the way of how the application will be accessible in the Visma App Store. In this example, we'll be using the "Invite Only" option.

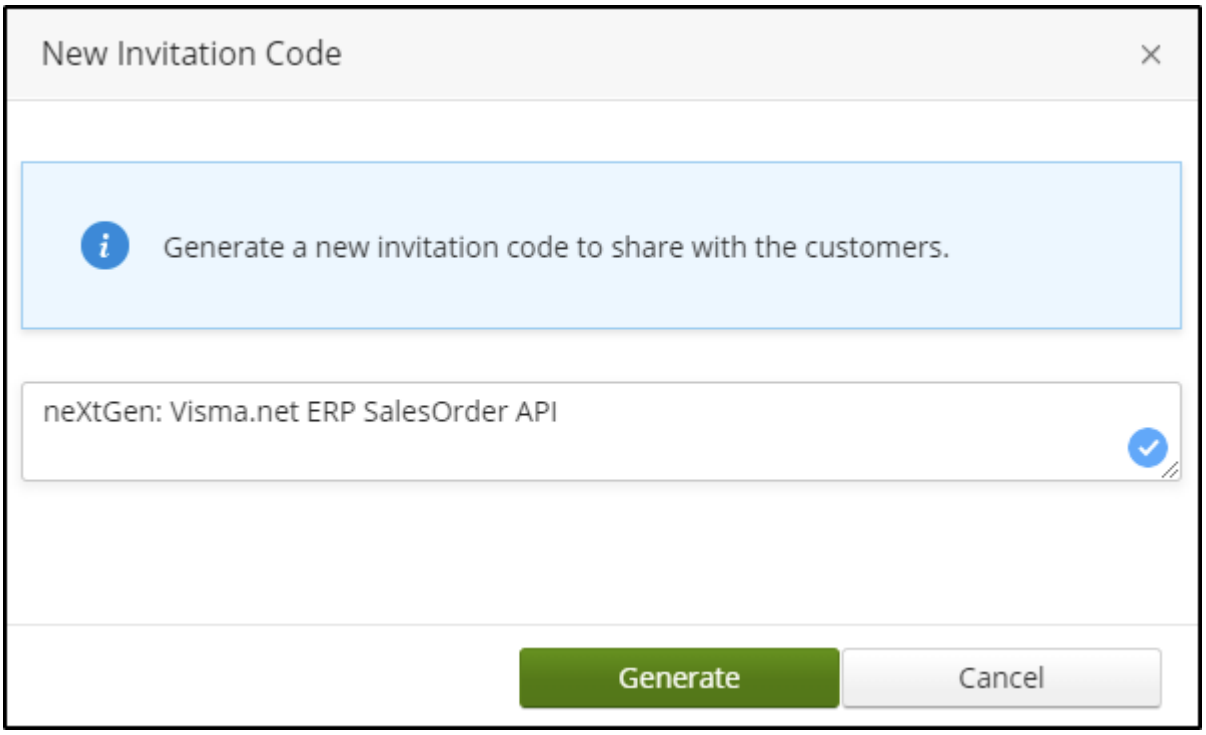
Click > **Save**

**2.1)** Generate an Invitation Code

**1)** Click on the "**Add new code**" button in the same "Publish to Apps.Visma.com" screen

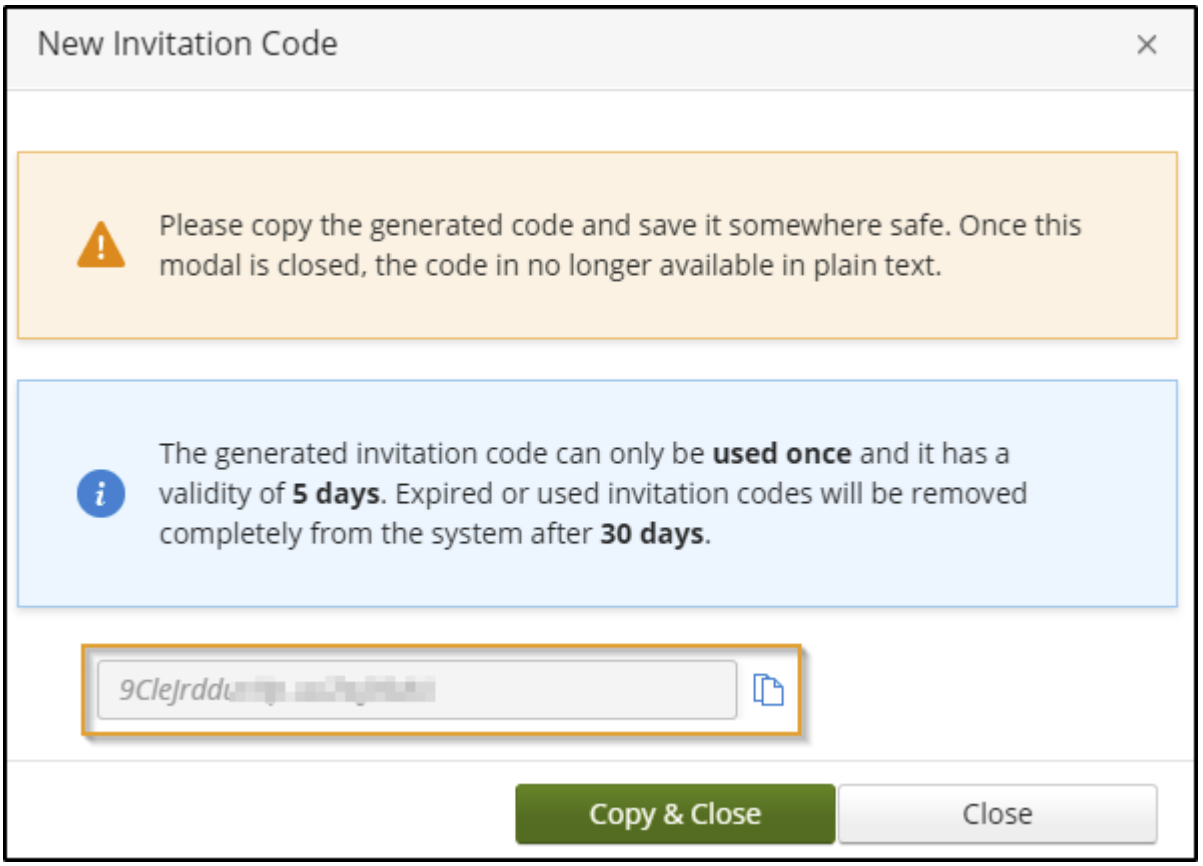



**2)** Enter a short description for the invitation code

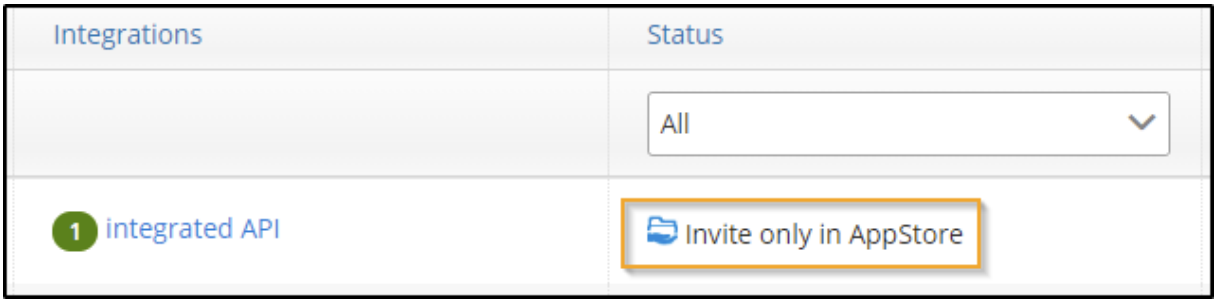



Click on the "**Generate**" button

**2.2)** Copy & Store & Share the generated "Invitation Code"



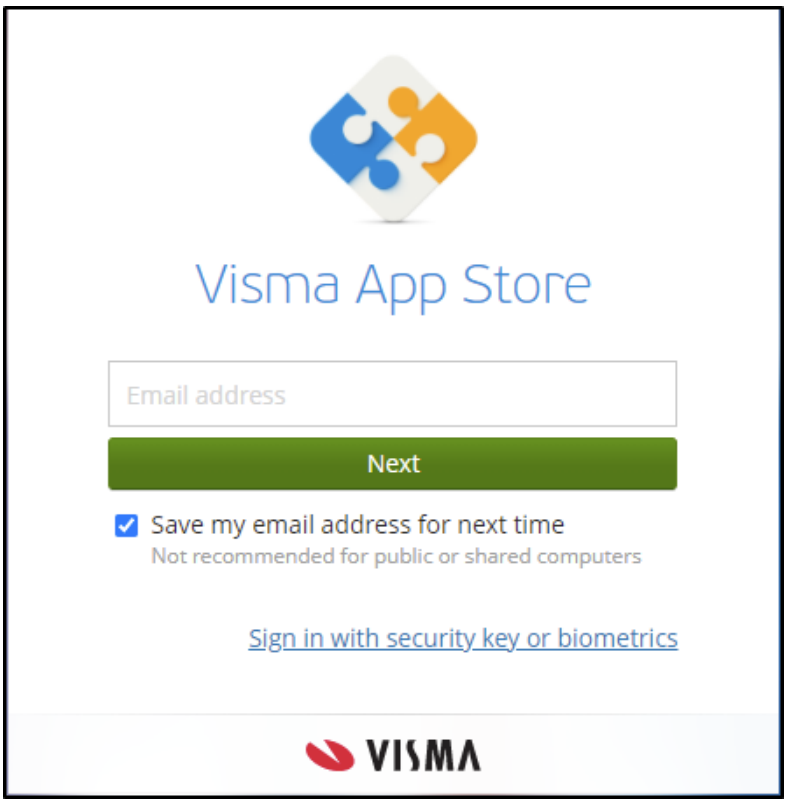

**2.3)** Go to "My Applications" page and check your application's status.


Invitation Code: Will be used by the Customer / User in the Visma App Store, that has the "Integration Administrator" role on the Financials ERP Company which they'd like to approve the integration for.

# **Step 3:** Create Your App Store Account

## **3.1** Go to the Visma App Store Login page

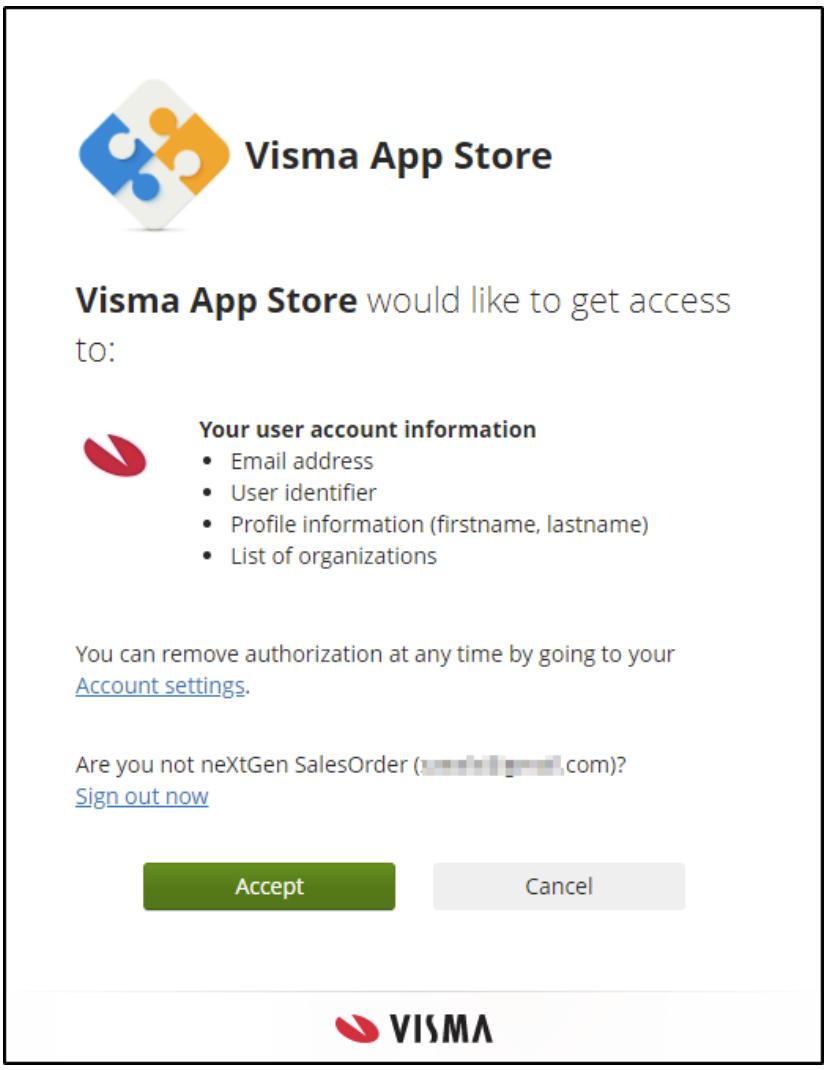



Enter your email address, which you've registered before, associated with Visma.

Follow the steps on the screen to set up your account.

Click > **Next**, then enter your password to login.

## 3.2 Grant access to your account

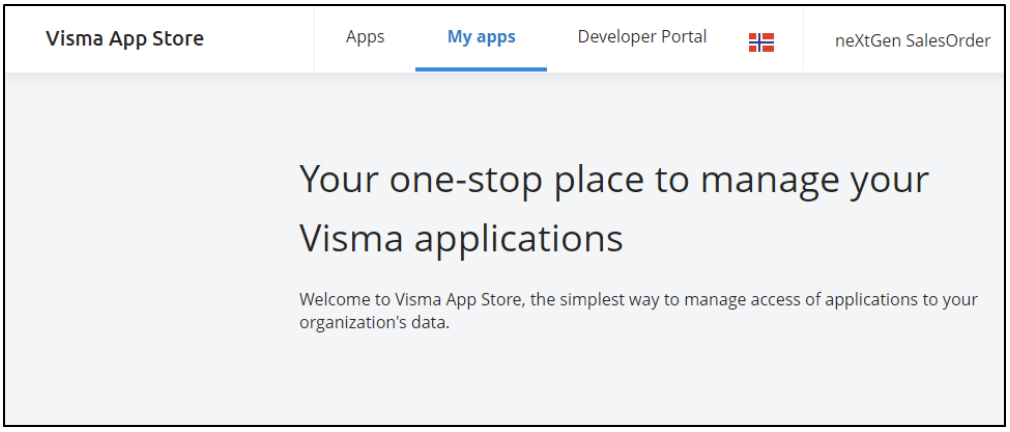



If this is the first time you're logging in, you need to grant access to your account.

Please click "**Accept**" and continue.

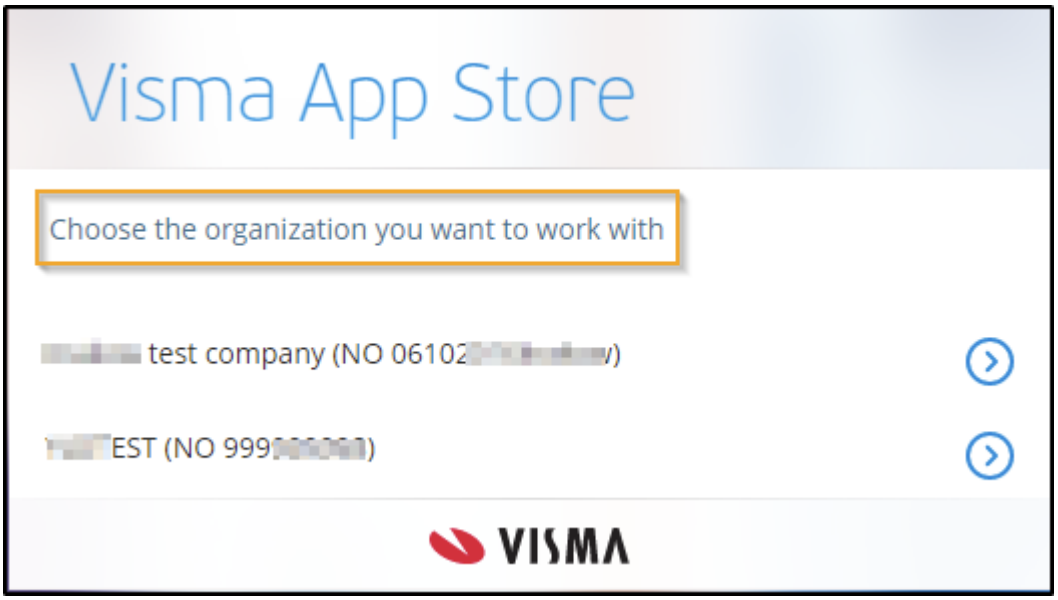
Then you'll be redirected to the main Visma App Store Page.

The customer has to log in to App Store with a user that has the "Integration Administrator" role for the company you want to approve the integration.

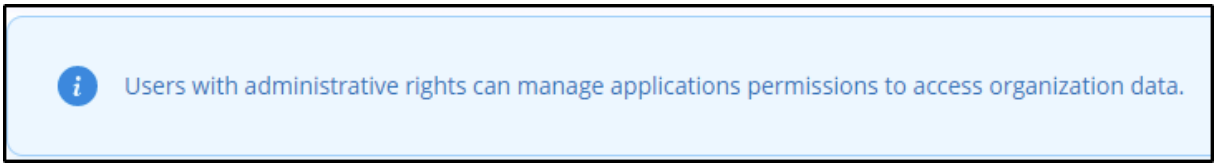


## 3.3 Choose the Organization/Company you want to work with

After login page, you should choose the Organization/Company you want to establish an integration with. A Customer / User that is logged-in to the Visma App Store, should at least have one company where it has been assigned with "Integration Administrator" role on one of the Financials ERP Companies that the user wants to approve the integration for.




Otherwise, you won't be able to choose any organization / Company to approve the integration for.

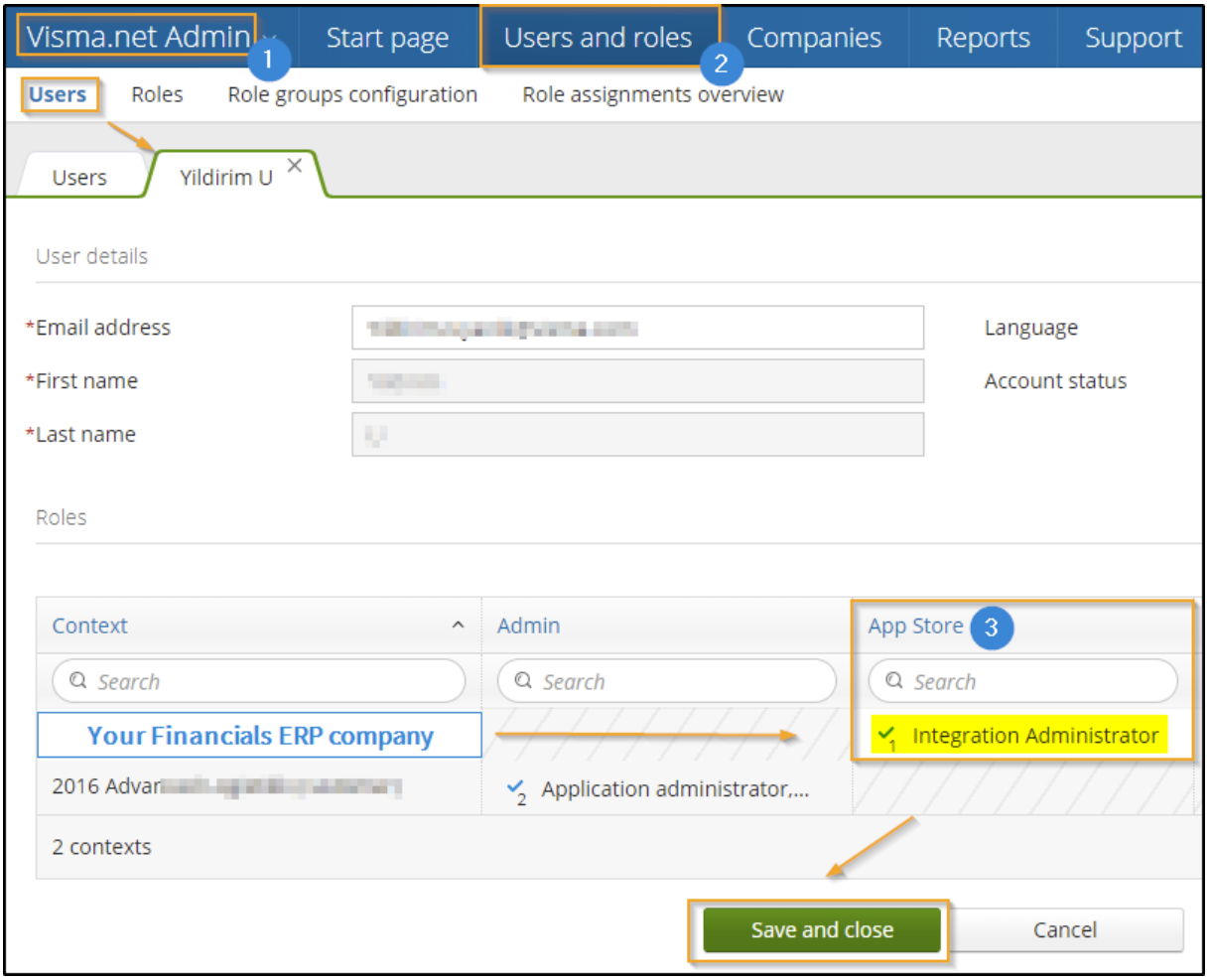


## 3.4 How to assign “App Store: Integration Administrator Role”

To be able to associate an integration for the desired company at the Visma App Store, you need to make sure your “Visma user” have the “**Integration Administrator**“ Role on the Financials company you want to use it for.

- Login with your Visma.net Financials Account: https://signin.visma.net and go to the “Admin” Panel.
- To be able to edit the access rights, you need to be logged in with a user which is a “Customer administrator” that can manage the roles in the company for the other users.

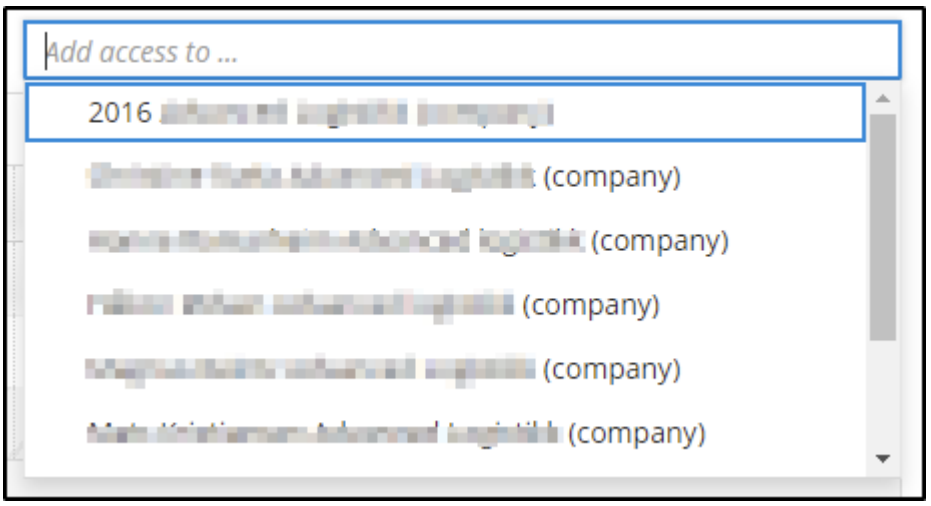
1) To set the roles, click on Visma.Net Financials in the top left corner and choose“Admin”
2) When you have opened the Visma.net Admin panel, click on “User and roles” head to the “Users” tab. Search for your “User: email address” and click.



### Company access and rights

If the company you want to edit the roles for does not exist in the list under your username, click the "**Add access to**" menu located on the right side of the panel  and look for the company you wish to add.

(*Only the companies will be available where your user has "Customer Admin" rights*)




3) Find the company and add "**Integration Administrator**" role.
4) Save & Close.

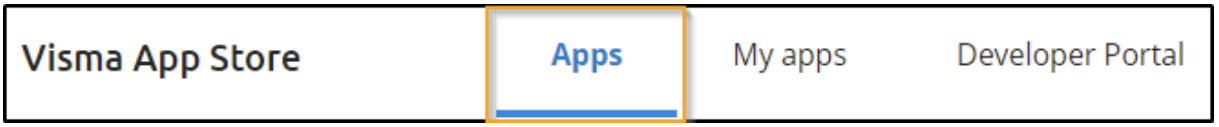
Now you can re-login to the Visma App Store and continue with the Step **3.3** Choose the organization/Company you want to work with. **Click here to go to the section**.

## 3.5 Find & Approve the integration for the Organization/Company

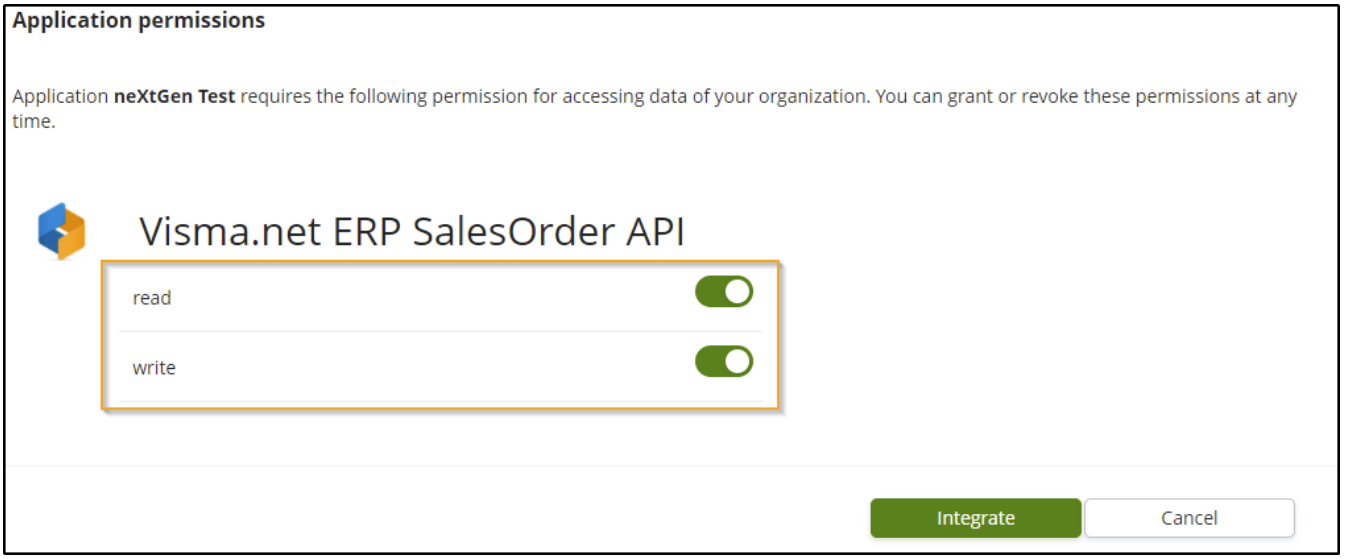
Since we're using "Invitation Only" option in this example, Customer/User need to enter the invitation code to find out and approve the integration.
(Described at **2.5** Publish your Application to the Visma App Store > **2.2** Copy & Store the generated "Invitation Code") **Click here to go to the section**.

**1)** Enter the " Invitation Code" and click on "**Find**"


Otherwise, publicly published Integrations will be available on the "Apps" page.



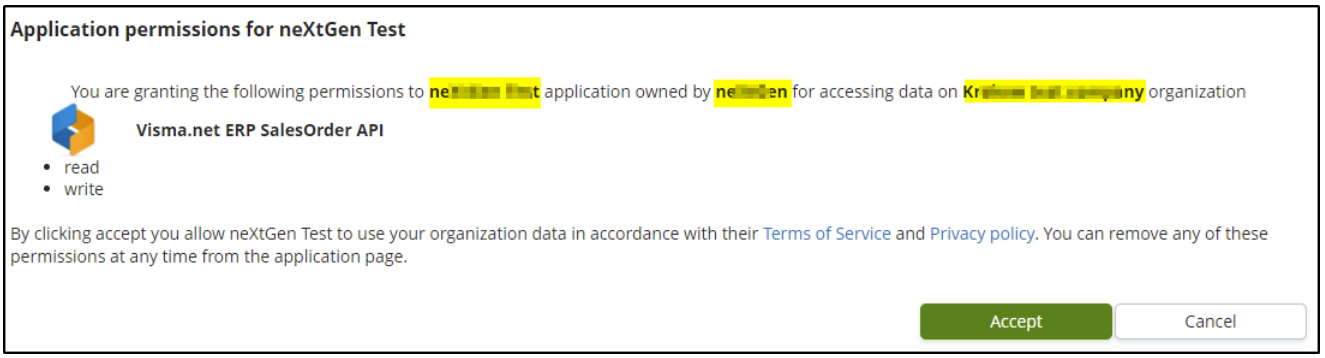

**2)** After clicking on "Find", Visma App Store will bring the application.



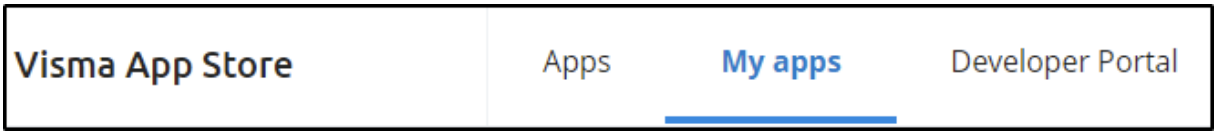

Select the "**scopes: read & write**" depending on the desired access level of the integration.

**3)** Click on "**Integrate**" button.

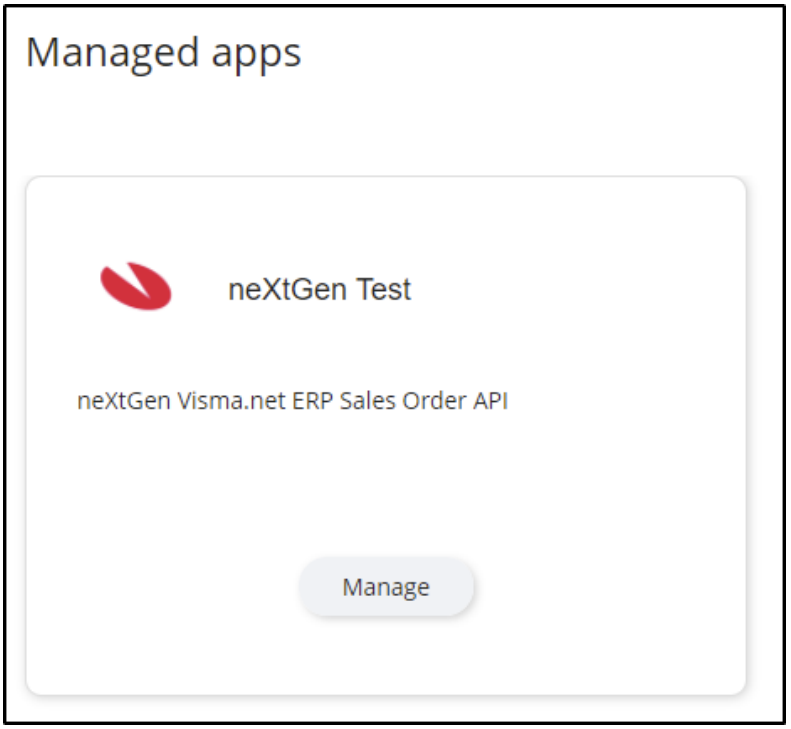
Upon clicking, you'll see the Applications' permission approval window. Click on "**Accept**" button after reviewing the information.




**4)** Congratulations ! Now, the application has been approved and integrated with the company/organization that you've selected for. You can see active & approved integrations under "**My Apps**" page.




You can also manage your application/s listed on the main page under the "**managed apps**" section by clicking on the "**Manage**" button



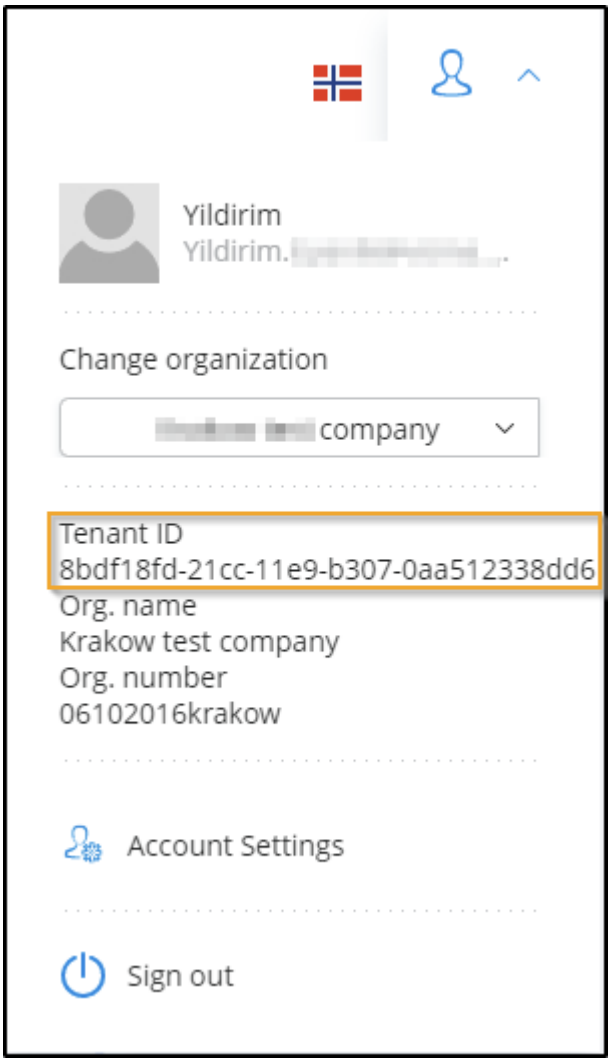
## **3.6** Get the Company / Organization's "Tenant ID"

Before we finish this section, there is an important field in the "Visma App Store" that both parties "**Integrators**" and "**customers & organizations**" should be informed about.

There is a field which is called "**Tenant ID**". This is a Company/Organization specific, unique identifier.

- This information can either be provided by the "**Visma Partner Services"** from the "**customers & organizations**" countries when they have been provisioned Visma.net Financials ERP Company or

- It can be found under the company/organization selector on the top right of the Visma App Store page.



Depending on the scenario, the user who has logged in to the App Store that would like to Approve an integration for a ”**customer & organizations**” should copy the “**TenantID**” of their company/organization and share with their “**Integrators**”

“**Integrators**” will be using the “**TenantID**“ while generating the Token for the API.

# **Step 4:** neXtGen service: Visma.net ERP Sales Order API

## **4.1** Permission Type and Tenant based APIs

### 1) Permission Type

An API can define what type of applications it accepts integrations from, regarding which of the OAuth 2.0 flows the application must use when obtaining an Access Token for the API. The following table shows an overview of permission types, the type of applications and grant types the application can use:

| Application Permission | Client Types | Grant Type | Description |
|---|---|---|---|
| **All** | All types | Any grant type | The API accepts Access Token obtained with or without user interaction. |
| **Interactive** | Web, spa | authorization_code | The API accepts only Access Token obtained with user's interaction in the authorization process. |
| **Non-Interactive** | Web, service | client_credentials | The API accepts only Access Token obtained by using **client_credentials** grant type (no user interaction). |

### 2) Tenant based APIs

Tenants are organizations (customers) which have data exposed by APIs. Tenant based Visma APIs are marked in Visma Developer Portal with symbol

If the API's Permission Type is **Non-Interactive**, your application needs to be granted permission by the tenant administrator before accessing API data. (Described at **3.5** Find & Approve the integration for the Organization/Company) **Click here to go to the section**.

Once the permission is granted, your application will use the tenant identifier (tenant_id) as parameter on the token request and use the obtained access token to call the API. Read more on Service Applications.

## 4.2 Authentication and Authorization for Service Applications

A service application doesn't involve the end-user in the authorization process. These applications are strictly used to call APIs and use the "client_credentials" OAuth2 grant type to obtain Access Tokens from the Authorization Server by providing its credentials and the set of scopes (permissions) it requests.

## 4.3 Generating a new API Token

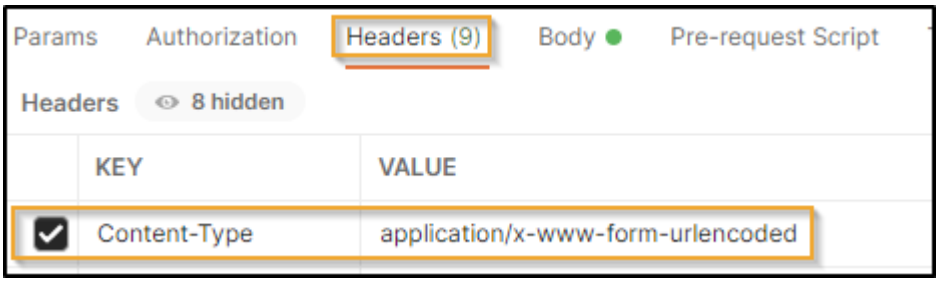
Service applications are using the client_credentials OAuth2 grant type to obtain Access Tokens.

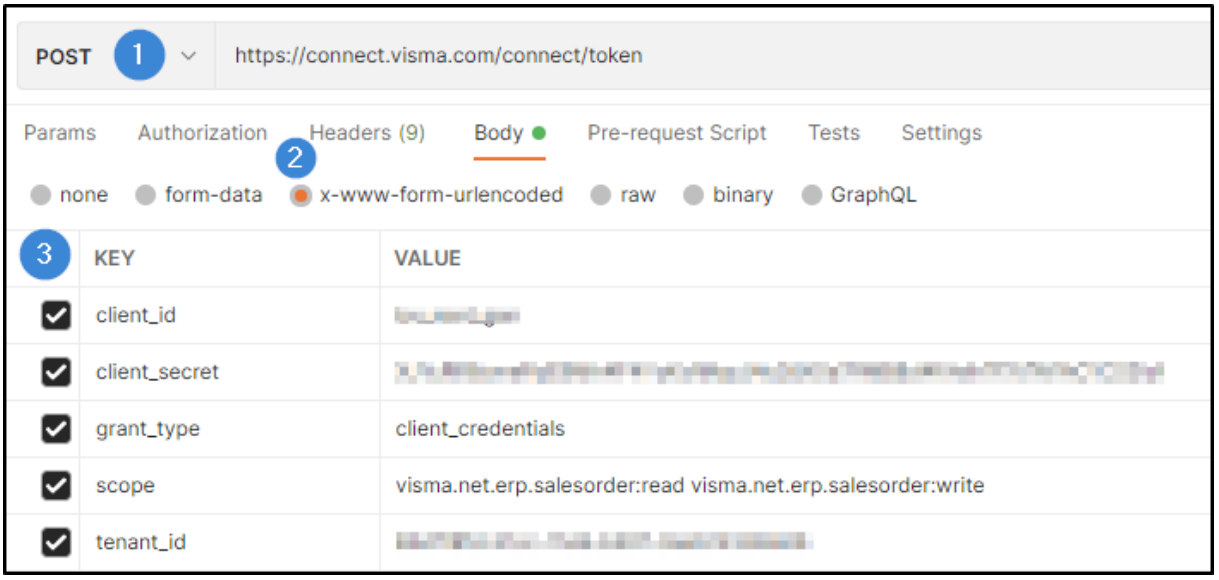
### -Request

```
Curl
 --request POST --url https://connect.visma.com/connect/token
--header 'content-type: application/x-www-form-urlencoded'

--data 'grant_type=client_credentials&
scope=visma.net.erp.salesorder:read visma.net.erp.salesorder:write&
client_id=CLIENTID&
client_secret=SECRET&
tenant_id=TENANTID'
```

**Example in POSTMAN:**




1) POST > https://connect.visma.com/connect/token
2) Request Headers
   a) Content-Type **:** application/x-www-form-urlencoded
3) Request Body
   a) **client_id :** ClientID (Generated in Developer Portal)
   b) **client_secret :** ClientSecret (Generated in Developer Portal)
   c) **grant_type :** client_credentials
   d) **scope** : visma.net.erp.salesorder:read visma.net.erp.salesorder:write

   ℹ Depending on what scopes have been allowed by the tenant administrator in the Visma App Store for your application.

   **If only "Read" allowed:** visma.net.erp.salesorder:read

   **If only "Write" allowed:** visma.net.erp.salesorder:write

   **If "Both" allowed:**

   visma.net.erp.salesorder:read visma.net.erp.salesorder:write

   (They should be separated by adding a **space** between the Read & Write values of the "scope")

## -Response


”**Expires_in**” can be set in the Developer Portal - My Application -Access Token Lifetime (Go to the section where it's described)

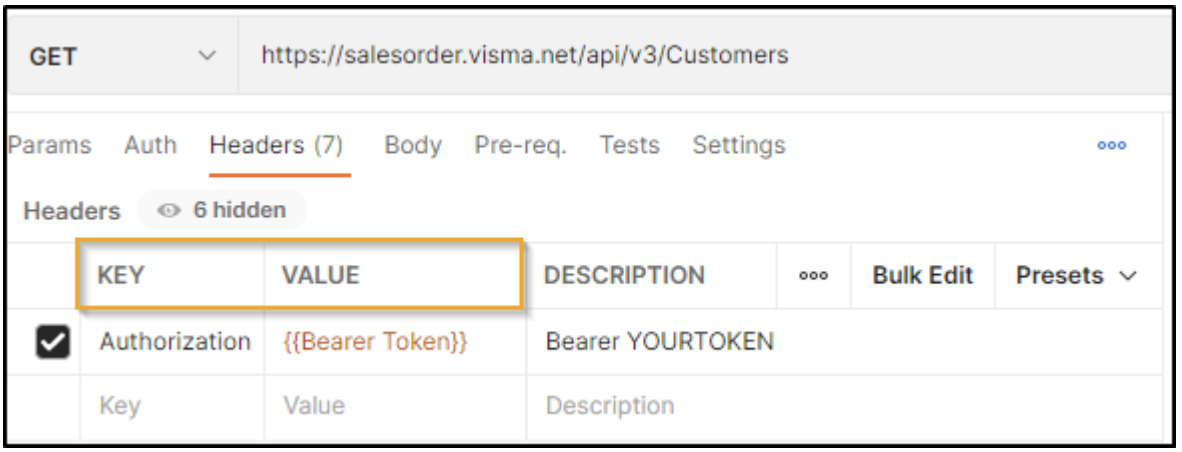
## 4.4 Example API requests for the Visma.net ERP Sales Order API

Visma.net.ERP.SalesOrder.Api Documentation

Currently available endpoints and their operations can be found at the **{ Swagger }**

- The value of the “Authorization” key should be set as “Bearer {accessToken}“ There should be a space between the Bearer & accessToken.

### 1. GET - a list of customers (/api/v3/Customers)



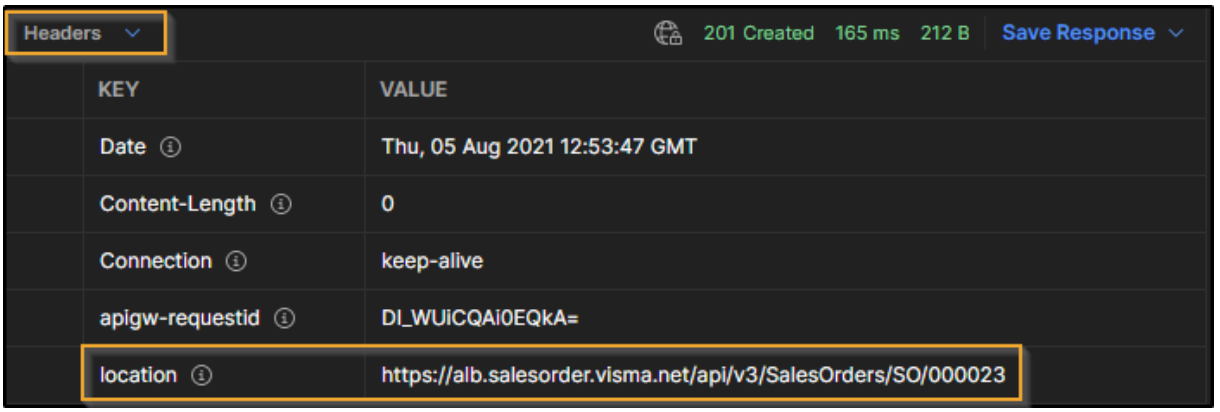
## 2. POST - Adds a new sales order to the system (/api/v3/SalesOrders)

-**Request:** https://salesorder.visma.net/api/v3/SalesOrders

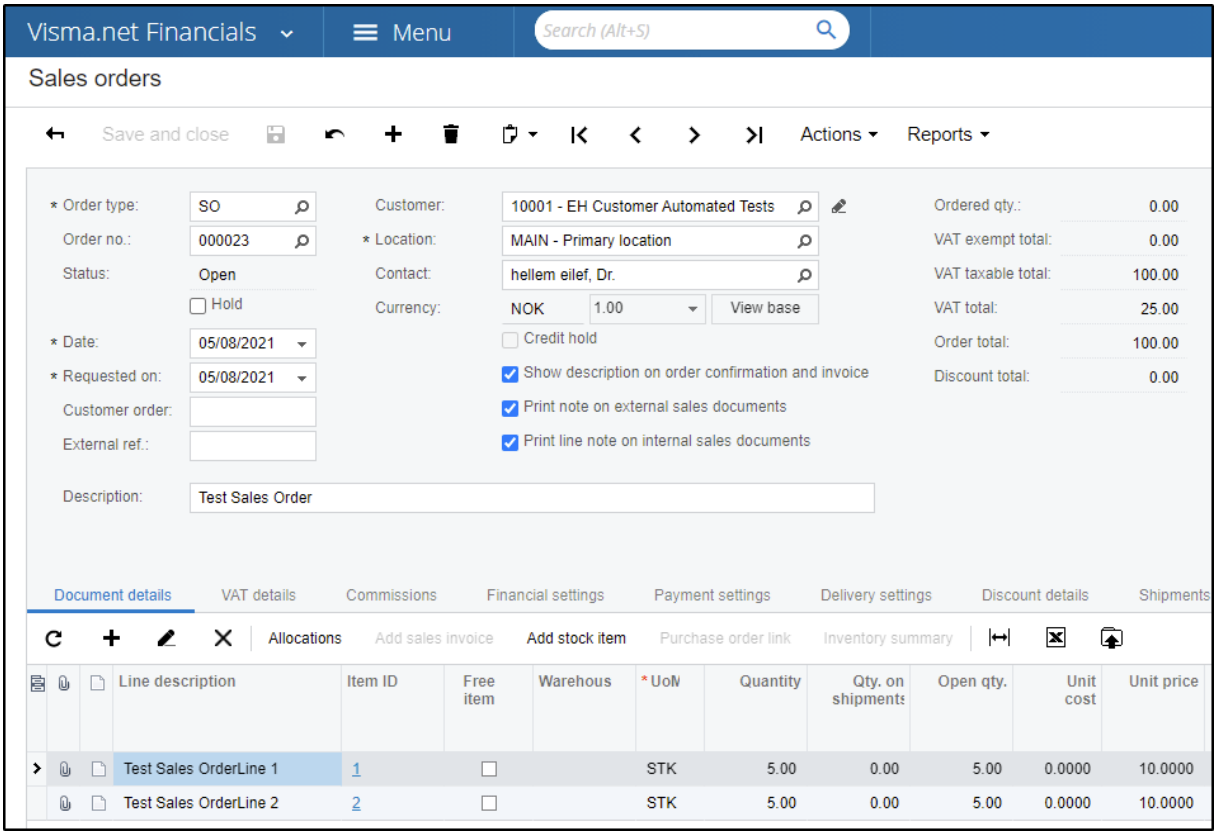
```
{
  "type": "SO",
  "date": "2021-08-05T12:38:58.570Z",
  "description": "Test Sales Order",
  "status": "N",  //  "N" (Open),  "H" (Hold). If not provided, the value will be determined by the sales order type.
  "customer": {
    "id": "10001"
  },
  "print": {
    "descriptionOnInvoice": true,
    "noteOnInternalDocuments": true,
    "noteOnExternalDocuments": true
  },
  "orderLines": [
    {
      "inventoryId": "1",
      "description": "Test Sales OrderLine 1",
      "quantity": 5,
      "unitPrice": 10,
      "taxCategoryId": "3"
    },
     {
      "inventoryId": "2",
      "description": "Test Sales OrderLine 2",
      "quantity": 5,
      "unitPrice": 10,
      "taxCategoryId": "3"
    }
  ],
"taxZoneId": "01"
}
```

## -Response Headers :

- Location: You can get a recently created object ID by looking into the Response Headers{Location} of the HTTP Response Headers.




## Visma.net Financials ERP Output



## Swagger Schema - Endpoint DTO Documentation

- There is a section which is called “Schema” In swagger located under every endpoint. Here we can find information about each exposed fields of the related endpoint.