

Exact Online connection with ROGER365.io



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Version 1.1



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High-level overview of the steps

The connection is made through the Exact Online API. The Exact Online API authorization is an two step process in which we have to move back and forth from the ROGER365.io admin portal and the Exact App Center

- 1) Create and authorize a ROGER365.io replicator
- 2) Create an Exact Online App for ROGER365.io
- 3) Configure ROGER365.IO

Create and authorize a ROGER365.io replicator

Go to the ROGER365.io admin portal and create a replicator. Choose the exact online option in the replicator. The Redirect URL is needed in creating the Exact App.

 Create a new Replicator

Name *

Exact Online - Contacts

Description

Connection configuration

Type *

ExactOnline

Redirect Url

https://api.roger365.io/CRM/Oauth/Callback/replicator

ClientId *

Client Secret *

This is a two step connection, further steps are available after saving...

Replication configuration

Country Code *

Netherlands (+31)

CANCEL

SAVE

Create Exact Online API for Roger365.io

Login to Exact Online with an account with administrator rights for the exact app center (<https://apps.exactonline.com/>) and click on manage my apps.

An app can only be used once for a replicator. If you use it more than 1 time, the replicator will break. So if you want a replicator for contact and account. You should create two apps in the exact online portal.

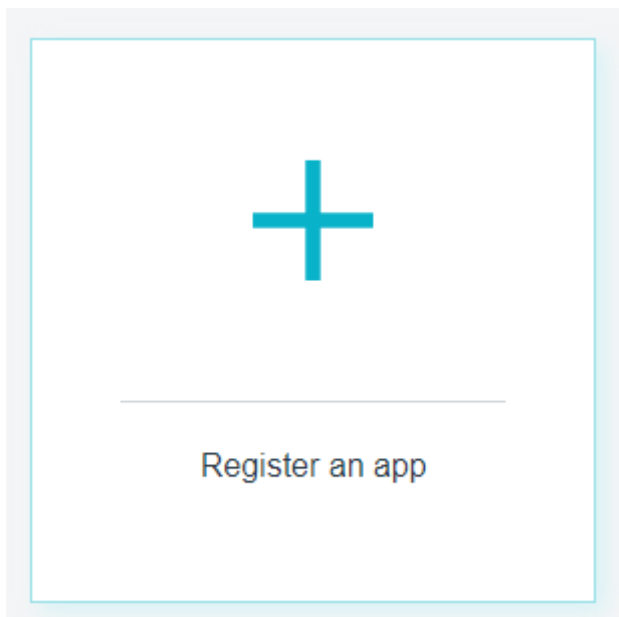
Exact App Center

Manage my apps

nl | en

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Click on register an app to create a new app for ROGER365.io



The redirect URI can be copied from the ROGER365.io admin portal from the replicator configuration we are creating.

 Create a new Replicator

Name *

Exact Online - Contacts

Description

Connection configuration

Type *

ExactOnline

Redirect Url

<https://api.roger365.io/CRM/Oauth/Callback/replicator>

Clientid *

Client Secret *

This is a two step connection, further steps are available after saving...

Replication configuration

Country Code *

Netherlands (+31)

CANCEL

SAVE

Give the App a name and copy the redirect URL from the ROGER365.io portal

Register a new app ✕

Name^{*}

ROGER365.io

Redirect URI^{*}

Terms and Conditions:

Exact accepts no responsibility for the accuracy of content on your website, or the exchange of data between the App and Exact Online.

☒ Yes, I accept the Exact Online Conditions.
[Read, print or download the Exact Online Conditions.](#)

☒ Yes, I accept the Exact Online App Center Terms And Conditions Of Use.
[Read, print or download the Exact Online App Center Terms And Conditions Of Use](#)

Register

If you want both accounts and contacts, you should create two exact apps. Just add – accounts or – contacts after the Name (example: ROGER365.io – accounts).

After registering the app some settings have to be copied to the replicator in the ROGER365.io portal. The setting, client ID and Client secret have to be copied to the ROGER365.io portal.

Naam van de app*	Redirect URI* ⓘ
ROGER365.io - Contacts	https://api.roger365.io/CRM/Oauth/Callback/replicator
Client ID ⓘ	Webhook secret ⓘ
af7d! a805	
Client secret ⓘ	
.....	

 Update Replicator Configs

Name *

Exact Online - Contacts

Description

Connection configuration

Type

ExactOnline

Redirect Url

https://api.roger365.io/CRM/Oauth/Callback/replicator

Clientid *

.....

Client Secret *

.....

AUTHORIZE APPLICATION

Replication configuration

Country Code *

Netherlands (+31)

CANCEL

SAVE

After saving the clientId and Client secret, an authorize application button appears. For exact online it is needed that you one time login with you Exact online credentials to get a token to the API. This token will be used by the replicator for authentication.

Exact Online - Google Chrome

start.exactonline.nl/api/oauth2/auth?client_id=1abbd72-5f08-447e...

Inloggen

=exact

Gebruikersnaam

Volgende

Exact Online - Google Chrome

start.exactonline.nl/api/oauth2/auth?client_id=1abbd72-5f08-447e...

Erwin Wiegman [Uitloggen](#)

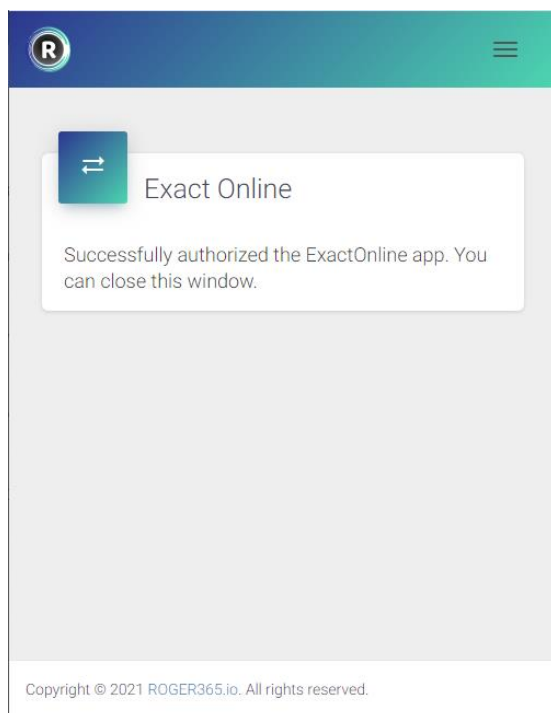
=exact

☒ Ik accepteer de [Exact Online App Center-gebruiksvoorwaarden](#)

☒ Ik begrijp dat het gebruik van de app volledig onder de gebruiksvoorwaarden van de app-ontwikkelaar valt en dat de app mijn gegevens gebruikt zoals hierboven wordt beschreven.

Toestaan

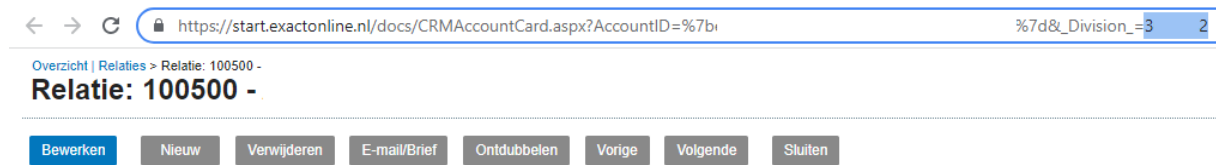
Weigeren



The pop-up can be closed. After this the last steps of configuring the replicator can be done

Get your Exact Online division ID

The division ID can be copied from the links in exact online. Go to your relations overviews and control + click on a relation to open the relation in an other tab. You can now see the division ID in the browser URL.



Your division number is after the &_Division_ =

Configure replicator in ROGER365.io


Update Replicator Configs

Name *
Exact Online - Contacts

Description

Connection configuration

Type
ExactOnline

Entity
Contacts

Redirect Url
https://api.roger365.io/CRM/Oauth/Callback/replicator

Clientid *

Client Secret *

Replication configuration

Start Time *
23/12/2021, 00:00

Frequency *
Day

Interval *
1

Contact Url
https://start.exactonline.nl/docs/CRMContactCard.aspx?_ID=%7

Country Code *
Netherlands (+31)

In this screen all the configuration from the previous steps will be used. The red part of the URL must be changed to reflect your environment. **Keep in mind that you can only use the clientId one time per replicator. If you want a replicator for accounts and for contacts, two exact apps should be created.**

Setting	Value
ClientId	ClientId from Exact App center
ClientSecret	Client Secret from Exact App Center
Contact URL	The URL to your Exact Online entity card. Account URL: https://start.exactonline.nl/docs/CRMAccountCard.aspx?AccountID=%7b{CompanyId}%7d&_Division_=<<your division ID>> Contact URL: https://start.exactonline.nl/docs/CRMContactCard.aspx?_ID=%7b{SourceId}%7d&_Division_=<<your division ID>> The division ID can be found in the link of the exact portal
Country Code	All phone numbers must be in E164 format. This setting gives the default country if local phone numbers are used. For more information see ask.roger365.io