Functional Release Notes 9.87.0

Release note status: **NOT STARTED**

9.87.0 - **SIGMA** 2024-03-26 UNRELEASED

(Internal document. BU is responsible for communication with customers and partners.)

Table of contents

Notice

26.3.2024

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Introduction

This document includes information about new and changed features, fixed issues, and known issues and limitations in the latest version of Visma.net ERP.

We recommend that you read through the document so that you are familiar with the changes that have been made in this version before you start using it.

Please note that this document refers to the UK English version of Visma.net ERP.

SIGMA services

General

Release Notes.	Documentation	T	Ret versi
New .csv file export options in User settings	In the User settings (SM203010) window, there are 2 new check boxes under "Csv file export settings" - Add separator after last column in csv file. If this is unticked, then no ; will be added after the last column - Force leading zeroes. If this is unticked, then ' will be removed from all char fields. Leading zeros will then not be shown in Excel. Additionally, the check box "Export Excel as CSV file" has been removed.	☑	9.83.0
Schedule disabled if it has crashed more than 10 times in a row due to invalid schedule definition	There is a general change for scheduled windows (SM205020): Active schedules that do not start successfully due to bad or wrong data in the schedules filter values, will now be set as Inactive after 10 tries. To correct this, the schedule must be opened, data corrected, and flag for active schedule must be set manually.	☑	9.82.0
Projects not synced to MDM after customization where moved to PX.Objects	When creating and editing a project in the Projects (PM301000) window, a notification was not sent and so sync to MDM was not triggered. This has now been fixed.	☑	9.73.0

Would it be possible to create another new (hopefully last) Customer in Staging that neXtGen Journal Transactions service can use for ~~MAVA~~/PENTEST testing? https://space.visma.com/channels/215285760 /VismaSecurityProgramResearchAndDevelopment/article /78112627
 	
We got our own customer "JTS Test" but believe that the best for this kind of security testing that will soon be done as part of VCDM, is to have it separated from our customer.
 	
• Admin role needed? Yes, johan.sundell@visma.com✉ and eilef.hellem@visma.com✉ as customer administrator
• Name of customer? "JTS PENTEST"
• Only these two users? Yes + roles as You put on System Test companies? Sounds perfect
• The default application/services for the companies
• We should be fine with only 3 companies
  ○ JTS PENTEST NL1
  ○ JTS PENTEST NO1
  ○ JTS PENTEST SE1
• Johan (prepare companies with data) and Eilef (configure apps in connect) will add the users when we got the names but estimate long term need of maximum 20 users
 	
Thanks a lot for help with this!
		☑	

New features in Automation schedules (SM205020) window	In the Automation schedules (SM205020) window there are two new features: - If the schedule is running, a new field above the Details tab will show the LockedUntil date and time. In addition, the button "Run schedule" will be deactivated. - A new tab at the end, "Last run result" will show detailed information about the last execution.	☑	9.73.0

Would it be possible to create a new Customer in Staging that neXtGen Journal Transactions service can use for testing?

We created companies from Operations Dashboard and added to keep list but now when we try to add the role "Integration Administrator" (to be able to set up test-integrasjon in App Store) it's not possible. It seems like neXtGen Sales Order service solved this by getting an own customer in Staging from Visma.net Admin (https://adm.stag.visma.net/admin/startpage/).

The plan is to create companies below this new customer and copy data from the test companies in Stage we created from Operations Dashboard when we have run first time startup for the companies.

- Admin role needed? johan.sundell@visma.com ✉
- Name? For example "JTS Test"
- Just ask if more info is needed

Default GL account for supplier "Told og skat" changed to 88200 in Danish template	The default GL account for supplier "Told og skat" is changed to account no. 88200 in the Danish company template.	☑	9.51.0
Check box "Use basic payment process" removed from Branches window	In the Branches (CS102000) window, the check box "Use basic payment process" has been removed, since all companies now use the new process.	☑	9.83.0
When provisioning a new company, always install new payment service as default	When provisioning new DEMO systems, the vlassic payment service was provisioned. From now on all new DEMO systems will get the new payment service as default.	☑	9.20.0
Nuget package Newtonsoft.Json version update	Nuget package Newtonsoft.Json version 11 has been updated to version 13 since version 11 has a vulnerability.	☑	8.96.0
New VAT related windows added to the menu	To improve the VAT reconciliation, new windows have been added to the menu for VAT handling and control: - VAT - Inquiries General ledger transactions with VAT (TX40500S) New in all countries exempt Norway In this window you can see all General ledger transactions including the VAT information. - Unreleased VAT transactions (TX40301S) New in all countries This window will show all VAT transactions that have not been processed in VAT reporting. - Layout templates - Finance VAT report, Norwegian 2022 (TX62106S) New in all countries exempt Norway This is the new VAT report for Norway for 2022, and will be used if the company is Norwegian.	☑	8.86.0
User session timeout extended from 2 hours to 8 hours	The limit for a user session to timeout has been extended from 2 hours to 8 hours.	☑	8.79.0
Currently cases in		☑	
Hide integration user for Visma Manager in VnE interface	Vni users are special system accounts which are not applicable for the regular user. These accounts are now registered as hidden in the system and will not show anywhere on the user lists are provided in Visma.net ERP.	☑	9.00.0
		☑	
Support for correcting invoices in Sales invoices window	There is a new functionality for correcting invoices in the Sales invoices (AR301000) window, which do not originate from the Sales orders (SO301000) or Shipments (SO302000) windows.	☑	8.73.0

Possible to create and delete Account groups if only Project Accounting Base Package is activated	Previously, it was not possible to create and delete account groups if only the Project Accounting Base Package is activated. This is now available for Project controller role and Administrator role as well.	☑	8.37.0
Waiting time for re-running actions in Master data management	Master data management (SM20101S) When selecting an action in this window, you will now get a question if you want to run the routine. This is done to avoid accidentally starting the wrong routine. If you have started one of the routines, you will not be able to start it once more until 3 hours later. This is to ensure that the started routine will be completed successfully.	☑	8.40.0
Improvements in UI translations	This version includes a large number of improved UI translations.	☑	8.30.0
Script history not working from Operation Dashboard	The Operation Dashboard (internal support tool) was not able to retrieve the script history from Healing Service. This has now been fixed.	☑	8.29.3
Remove the option "Recalculate discount on partial shipment" from the Order types window	The rarely used option "Recalculate discount on partial shipment" in the Order types (SO201000) window, has been removed since it caused issues with VAT and discounts. It will no longer be available in the system.	☑	8.26.0 (8.26.0 8.1036)
Descriptions of supplier and customer classes changed for Norwegian template	The descriptions of supplier classes have been changed for the Norwegian template: 1 Norske leverandører varer 2 Utenlandske leverandører varer 3 Norske leverandører tjenester 4 Utenlandske leverandører tjenester 5 Norske avgiftsfrie leverandører tjenester The description of one customer class has been changed for the Norwegian template: 2 Utenlandske kunder avgiftsfrie No other settings have been changed.	☑	8.25 (20090 8)
make logging work to UDP		☑	
New functionality Add report to screen (CS20200S)	There is new functionality Add report to screen (CS20200S). It is available for all users with the Administrator role.	☑	8.23 (20060 9)
Disabled forced pagination for 8.21	Forced pagination has been disabled for verson 8.21.	☑	F2020 05
Message displayed in UI when system maintenance is requested	If a company is set to maintenance job in the future, a message for this will be shown in the UI right next to the search element.	☑	8.68.0
System email accounts (SM204002) window improved and refactored	The System email accounts (SM204002) window has been refactored to be more intuitive, and now the settings for outgoing and incoming mails appear on different tabs. The tab "Outgoing mail settings" will only show a single check box "Use default outgoing mail server" as default. If it is not selected, the tab will show all settings. Three options will be available in the future: 1. Use default mail server without extra actions requires that the value in the "Email address" field is the default (no-reply@finance.visma.net) 2. If "Email address" is custom, and "Use default" is selected, you will get info about DNS records to be registered in your local domain to make email work. 3. If "Email address" is custom, and "Email server" is custom, you need to enter SMTP details as today. If "Use default outgoing mail server" is selected, and Email address is not custom, you will get an info message, and data will be re-set.	☑	8.64.0
New columns for showing split of Subaccount string	In the Subaccounts (GL203000) window, there are new columns available (not default) for showing the split of the Subaccount string. The columns get their name from the segment definition in the Segmented keys (CS202000) and Segment values (CS203000) windows.	☑	8.67.0

New columns in Subaccounts window showing segments from the system	In the Subaccounts (GL203000) window, there are new columns in table, showing segments from the system. When you create a new subaccount, either from UI or from Excel import, the values will be populated based on the definition in the Subaccount column.	☑	8.66.0
Database upgrade script to split SubCD in individual fields	In the Subaccounts (GL203000) window, all records in Sub table are now updated with the values in the new CD0X columns.	☑	8.67.0
Select language for processing of scheduled tasks	In the Automation schedules (SM205020) window, there is a new field on the Details tab, where you can select the language to be used in the processing of the scheduled task. This is useful for the reports generated and sent by a schedule, so you can determine which language the attached report will use. The default value is "blank", which means that the default language (English) will be used.	☑	8.45.0
Starting of a scheduled task disabled when its previous execution is not completed	In the Automation schedules (SM205030) window, in some scenarios, it was possible to start a scheduled task even though its previous execution was not completed, resulting in wrong calculation of next run date/time. Now you will get a warning if this scenario occurs (The schedule is already running).	☑	8.44.0
Send message from UpgradeEngine to Visma.net ERP to make users aware of new releases	If you work in the system while a new version is deployed, you will get an information message right to the "search" control on top of the screen. You can continue your work, and the new version will not be accessed until the next time you log on to Visma.net ERP (log off/on to ODP, swith service, or swith company/branch).	☑	8.29.1
Automation schedules not showing weekdays with Weekly schedule type	In the Automation schedules (SM205020) window, when you clicked on "Weekly", the group boxes for selecting weekdays did not apperar in the window. This has now been fixed.	☑	8.26.0 (8.26.0 8.1036)
Split database upgrade transaction between schema changes and data upgrade	The database upgrade transaction will be split between schema changes and data upgrade. This will make the process of upgrading databases safer and faster.	☑	8.29.2
after updating id4 version, this error is logged since client secrets are not validated correct: "Client secret validation failed for client: systemdataserviceconsumer" Need to implement a ISecretValidator.		☑	
Warning limit 1000 lines in export to Excel/CSV	In export to Excel/CSV from inquiry windows, the limit for warning is now changed to 10000 lines.	🔖	9.83.0
New general functionality for exporting from grids to file (Excel)	Export to file (Excel) New general functionality for exporting from grids to file (Excel). Clicking the arrow icon for Excel export, you can select which type of export format you want. - Excel, same functionality as before - CSV, general file export format with only data records.	🔖	9.77.0
Special characters in email account name in System email accounts window	Earlier, in the System email accounts (SM204002) window, it was not possible to use special characters in the email account name. This has now been fixed.	🔖	9.29.0
To be able to link ERP API to ERP Application in Developer Portal, ERP Application needs to have at least one "application role" registered in Visma Connect. As of now, this is only possible via Visma Connect Public API.		🔖	
To be able to link ERP API to ERP Application in Developer Portal, ERP Application needs to have at least one "application role" registered in Visma Connect. As of now, this is only possible via Visma Connect Public API.		🔖	

Aggregated values removed from all list windows (screen ID with postfix PL)	Earlier, there were huge performance impacts on the list windows when the corresponding generic inquiry contained aggregated values. Since the main use of the list windows (screen ID with postfix PL) is to find a specific document and not to get aggregated values for all rows in the grid, this functionality has been disabled. By disabling this functionality, the performance is ensured and any aggregated values defined in the corresponding generic inquiry are ignored. Normal generic inquiries still support aggregated values.	🔖	Not Planned
File types .msg and .eml available as email attachments to documents	Types .msg and .eml have now been added as allowed file types. Now emails saved as these file types can be attached to documents in the system.	🔖	9.82.0
• DNS Hosted Zone for Internal Test • VITC request for payment service DNS (pay-erp.visma.net)		🔖	
Customer feedback on end user documentation	It is now possible for a user to give feedback on our end user documentation. By introducing the customer feedback feature in Help Centre, we're hoping to get to know our users a little better and understand how they use our help. This is important for us in order to improve our documentation. We will start with the top 20 most visited help articles. This feature will be available in version 8.42.	🔖	8.42.0
New default email account not using default account settings	When creating a new default email account in the Email (SM20400S) window, the account was not set to use the default mail account settings. This has now been fixed.	🔖	8.70.0
Posting class window IN206000 and field available in Visma.net ERP Base Package	The Posting class window IN206000 and the Posting class field are now available in the Visma.net ERP Base Package.	🔖	8.39.0
New changes in Visma.net Project Accounting base package and in Visma.net Project Accounting Advance Allocation and Billing	The following screens have been removed from the Administrator role from Visma.net Project Accounting base package and moved to Visma.net Project Accounting advance allocation and billing for the same role: PM207000 PM204200 PM204100 PM205000 PM207500 PM40107S PM502500 PM506000 PM503000 PM502000 PM505000 PM206000 PM307000 The following screens have been removed from the Financials light user role from Visma.net Project Accounting base package and moved to Visma.net Project Accounting advance allocation and billing for the same role: PM40107S PM206000 PM307000	🔖	8.36.0
Company tree info tab now available in Employees window (EP203000)	The Company tree info tab is now available in the Employees window (EP203000), which makes it easier to add employees in the organisational approval structure.	🔖	8.35.0
Improvements in fetching of GLHistory records during the consolidation process	During the GL accounts consolidation process, retrieval of all GLHistory records via API took a very long time and the process used to time out. This process has now been improved to use the pagination with period filtering. All the API calls are made asynchronous so that timeout does not happen anymore. For a user's perspective, Start period is now required to be set to run the process, End period is optional. You will get an error if Start period is empty. To avoid getting transactions from current period we recommend to also set the To period so you do not get data that's not reconciled.	🔖	8.36.0
Support annuitity depreciation for Dutch methods	There is a new calculation of depreciation for the fixed assets called "Dutch Method 3". The depreciation amount for a period is based on annuities, and first you must enter the interest percentage for financing the residual value.	🔖	8.33.0

Upgrade applications without downtime for users	The application upgrade process has been changed so that the users are not going to be affected when the application is upgraded to a new version. Users are going to be notified with a message saying that they need to log off and log on again in order to have their company upgraded to the latest version. There are going to be no downtimes for application upgrades anymore.	🔖	8.29.1
Access for project accounting screens modified in licences Visma.net Project Accounting Base Package and Visma.net Project accounting Advance Allocation and Invoicing	The access for project accounting screens have been modified as follows: - for Visma.net Project Accounting Base Package, for the Project controller role and Project manager role - all access for screens and fields related to project invoicing have been removed and have been included only in Visma.net Project accounting Advance Allocation and Invoicing.	🔖	8.33.0
Test schedules in Automation schedules (SM205020) window	In the Automation schedules (SM205020) window, you are now able to test execute a schedule by pressing the new "Run schedule" button.	🔖	8.25 (200908)
Publish updates from template support roles and access rights	The Publish updates to companies window (CS10301S) now supports user roles (SM201005) from template company, as well as changes to roles set via Access rights by role (SM201025) or Access rights by window (SM201020). It will not be possible to transfer users connected to a role between companies. The target company must execute Import updates from templates (CS10302S) in order for the changes to be applied.	🔖	F2020 05
Sum lines with functions in generic inquiries	In the Generic inquiry (SM208000) window, in the Results grid, there is a new column called Total aggregate function in the Column configuration. You can use it to get aggregate values in the bottom leftmost corner of the inquiry. The values will also be exported to Excel, in the same position as the inquiry. The functions are: AVG - Average of the records COUNT - Number of records MAX - Maximum value MIN - Minimum value SUM - Sum of all records	🔖	F2020 05, Visma. Net ERP Kanban week 24, Visma. Net ERP Week 24
Upgrade ERP databases without disrupting the users' activities	The database upgrade process has been changed so that the users are not going to be affected when the customers' databases are upgraded to a new version. There are going to be no downtimes for customer database upgrades anymore.	🔖	8.29.1
Select an hour interval for automation schedules	In the Automation schedules (SM205020) window, the layout of the Schedule tab has been improved: - The "Excact time" field has been removed, and the value is always set to true for NEW schedules. - The "Starts on - "Stops on" fields have been replaced with "Run between". - The "Interval" field: you now have to select a time interval (in hours) from the drop-down.	🔖	8.29.0
Country code MK updated to REPUBLIC OF NORTH MACEDONIA	The name of country code MK has been updated to "REPUBLIC OF NORTH MACEDONIA".	⚠️	9.81.0
Schedules stuck in the Automation schedules window	In the Automation schedules window (SM205020), in some scenarios, the last execution result (status) was displayed as "Waiting/running" forever. This has now been fixed.	〽️	9.80.0
Error when clicking the Groups option in several reports	There was a general problem with reports. When clicking on the "Groups" icon in different reports, you got an error message. This has now been fixed.	〽️	9.77.0
Change in number series allocation routine preventing seeing of next number in generic inquiry	After refactoring of the number series allocation routine, it was not possible to view "Next number" for a NumberingID in a generic inquiry. This is now possible by using the NumberingSequenceValuesAllocations table in an inquiry.	〽️	8.95.0

Changing username causing loss of favourites and configuration	Earlier, if you changed your email (username), this was not propagated to configuration tables using username for identification. This caused loss of existing configuration, such as favourites and column configuration, but not limited to them. Also other personalised items like filters, grid preferences, and report and project settings were affected. This has now been fixed.		8.99.0
Generic inquiry generating SQL statement without a company id parameter under some specific conditions	Earlier, in the Generic inquiry (SM208000) window, when executing an inquiry using "Full join" types and no filters were used, you could in some scenarios generate an SQL statement without the companyid parameter. This has now been fixed.		8.62.0
Issues in project synchronisation to Approval	Earlier, if your ProjectIDs where based on multiple ProjectUnitTypes and ProjectUnits, when executing the Restore all operation from the MasterDataManagement Operations (SM20101S) window, the Project entities in MDM could be restored without the correct link between ProjectUnitTypes and ProjectUnits. This has now been fixed.		8.44.0
Issues in project synchronisation to Approval	Earlier, in project synchronisation to MDM on a project with IDs defined by multiple project segments (in Segment keys CS202000), the message to MDM was not generated correctly. Then it was impossible to build up correct approval rules based on the project in Approval. This has now been fixed.		8.42.0
Inquiry windows not based on generic inquiry routine not responding to export command from Excel/CSV droplist	Inquiry windows not based on the generic inquiry routine did not respond to the export command from Excel/CSV droplist. This has now been fixed.		9.78.0
Clipboard button removed from Add report to window	In the Add report to window (CS20200S), the Clipboard button (with Copy, Paste and Save as template actions) has been removed. These actions have no function in this window, and their use often resulted in corrupted data.		9.18.0
Generic inquirires based on AUSchedule table giving an error message when executed	Generic inquirires based on AUSchedule table gave an error message when executed if the new column "StartErrorCounter" was not included in the result set.		9.84.0
Sending emails failing in All emails window	In the All emails (CO409070) window, if one of the emails failed during sending (e. g. invalid email address), you would get an error message on the rest of the emails that were sent in the same sending. This has now been fixed.		9.75.0
Error when going back in browser from the Email activity (CR306015) window	Earlier, there was an error when going back the in browser from the Email activity (CR306015) window. When working in e.g. the Sales orders, when you enter an order, print it and send it by email, clicking "back" in the browser could end up in the actual used report screen and then throw an error message. This has now been fixed, and you will be redirected back to the screen where the process started from (e.g. Sales orders)		9.73.0
Formatting errors in export to Excel in CSV format	When exporting data to Excel in CSV format using a Nordic language in Visma.net ERP, you could experience that date, period, and special characters (ÆØÅ) were wrongly formatted. Leading zeros were also removed. These have now been fixed.		9.64.0
Setting default country in the Organisation details section of the Organisations window	In the past for organisations, you could set default country in the Organisation details section of the Organisations (CS101500) window, irrespective of what company you were on. This will no longer be possible for the Main company when one uses branches and for a regular company when branches are not being used. The reason for this is that these companies are created (and the data thus owned) by the Admin service. If these are changed within the ERP, the data will be out of synch with the owner of the data (Admin) and normal operation will fail.		9.64.0
Company selector not updating properly when assigning branch access role from User roles	In the User roles (SM201005) window, if selected role was applied to an organisation/branch in the system, and you selected the user to have access to these through the User roles window, selector service was not updated. This resulted in branches available (or unavailable) in top rightmost branch selector. This has now been fixed.		9.29.0

Automation schedules with filters displaying dates differently depending on language	Earlier, in the Automation schedule (SM205020) window, when creating schedules containing filters with dates, the date was displayed differently in the window depending on your language. This has now been fixed.	🔲	9.16.0
Branches from Visma.net ERP not turning up in Visma.net Approval	Previously, the branch synchronisation message sent by Visma.net ERP to Visma.net Approval was not triggered in the following scenarios: - Creating a new organisation - Changing organisation type from 'Without branches' to 'With branches not requiring balancing' or 'With branches requiring balancing' (the organisation default branch ID gets changed) - Changing organisation type from 'With branches not requiring balancing' or 'With branches requiring balancing' to 'Without branches' (if the organisation has only one branch, the branch ID is changed to be equal to the organisation ID) - Changing the ID of an organisation of the 'Without branches' type (the default branch ID is changed to be equal the organisation ID - Deleting an organisation This bug has been fixed and the all required messages are sent.	🔲	9.00.0
Change of company/branch name updated branch selector	When you change a company/branch name in a multi-branch company, the branch name will also be updated in the Company/branch selector in the upper right part of the window. The name of the main company/branch must be changed in Admin.	🔲	8.91.0
Not possible to add or edit an activity, or open the Non-stock items window.	Earlier, you were not able to add or edit an activity in the Customers (AR303000), Suppliers (AP303000) and Projects (PM301000) windows. Also, the Non-stock items (IN202000) window did not open correctly when clicking the link in the Item ID field in the Purchase orders (PO301000) and Sales orders (SO301000) windows. These have now been fixed.	🔲	8.88.0
Report status in Process VAT report not updated when changing branch	Earlier, there was an error where the reporting status was not updated when changing branch in the Process VAT report (TX502000) window. This has now been fixed and the status for the selected branch is not the first selected branch for the company.	🔲	8.92.0
Error with number series containing "-" or "+"	Earlier, when users had number series containing "-" or "+", they got error message: Error casting nvarchar to bigint. This has now been fixed.	🔲	8.87.0
Error in number series when numbers are greater than int (2,147,483,647)	Earlier, for customers with large numbers in their number series (more than 2,147,483,647), saving of documents resulted in an error message. This has now been fixed.	🔲	8.87.0
Personal settings available in the Users window	Earlier, in the Users (SM201010) window, the fields on the tab Personal settings were only enabled if you had changed the settings under the My ERP details section. This is now been changed so that the fields are enabled for all user records.	🔲	8.92.0
Duplicate tab reverts to start page	Sometimes, when you used the browser functionality to duplicate a tab, or CTRL+click on a menu item, the new tab was not opened with the same window ID as the parent tab. This has now been fixed.	🔲	8.80.0
Reports - downloading to PDF created HTML	In some scenarios, clicking the download button to create a PDF file of the report, the explorer dialog opened with HTML as file extension. This has now been fixed.	🔲	9.49.0
Restriction of access to customer and/or supplier classes	Earlier, in the Restriction groups (SM201030) window, when restricting access to customer and/or supplier classes, the restrictions were only applied to the customer/supplier entities connected to the classes. Now, when restricting access to a class, the class will not be visible in the windows for customer/supplier classes. In addition, if the user has no access to the default class set in the customer/supplier preferences, the Customer/supplier class field will be cleared when creating a new customer/supplier.	🔲	9.05.0
Error when trying to make a new import scenario	Earlier, in the Import by scenario (SM206036) window, you could get error message "Session expired" with some import scenarios when saving the imported scenario. This has now been fixed.	🔲	8.96.0

Error message going in loop when logging in after session timeout	If a user session was left unused over a time and then using it again, you could get the message "Session expired, please reload the page". When doing this, sometimes you ended up in a never ending loop during logon. This has now been fixed.	🔲	8.79.0
Five new variables in ARM reports to get organisation or branch name and corporate ID	In ARM reports, there are 5 new variables to use in the Column set headings to get the organisation or branch name and corporate ID. =Report.GetOrganizationNameFromId(organizationId): where you replace the organizationId with @Organisation, will return the selected company and it must be used together with request for company. If the request is off, it returns the main company name. =Report.GetBranchName(branchId): where you replase branchId with @StartBranch or @EndBranch, will return the requested branch corporate ID. If the request is off, it returns nothing. =Report.GetOrganizationNameFromBranch(branchId) where you replace branchId with @StartBranch ore @EndBranch, will return the company name for the branch =Report.GetCorporateIDFromBranch(branchId): where you replase branchId with @StartBranch or @EndBranch, will return the requested branch corporate ID. If the request is off, it returns the active branch corporate ID. =Report.GetCorporateIDFromOrganization(organizationId): where you replace organizationId with @Organization, will return the requested company's corporate ID. If the request is off, it returns the active branch corporate ID. Existing customers using multi-branch have to update the column set they use to get the new methods in the formulas. These are the formulas used in new created companies Update company name so it prints the selected =IIf(@Organization>'0',Report.GetOrganizationNameFromId(@Organization), IIf (@StartBranch>'0',Report.GetOrganizationNameFromBranch(@StartBranch), Report.GetDefUI('RowCompanyBAccount.AcctName'))) Update corporate ID so it print branch ID/name or company corporate ID =IIf(@EndBranch > '0' and @StartBranch <> @EndBranch, 'Branch ' + @StartBranch + ' - ' + @EndBranch ,IIf(@StartBranch > '0' and @StartBranch = @EndBranch, Report.GetBranchName(@StartBranch), 'Corporate ID: ' + Report. GetCorporateIDFromOrganization(@Organization))) Add corporate ID for branch =IIf(@Organization> '0' and @StartBranch <> @EndBranch, 'Corporate ID: ' + Report.GetCorporateIDFromOrganization(@Organization), IIf(@EndBranch > '0' and @EndBranch <> @StartBranch, 'Corporate ID: N/A' , IIf(@StartBranch > '0' and @StartBranch = @EndBranch , 'Corporate ID: ' + Report. GetCorporateIDFromBranch(@StartBranch),' '))) Replace corporate ID and branch with your local language.	🔲	9.05.0
Deleted departments not reflected in MDM	In the Departments (EP201500) window, if you deleted a department, the change was not updated in MDM. This has now been fixed.	🔲	8.71.0
Error setting windows as favourites	Earlier, when clicking the "star" in the Process payments (AP50300S) window to set this window as a favourite, the correct window was not marked as a favourite. This has now been fixed.	🔲	8.79.0
Email account access right restrictions not working correctly	In the Email account access (SM201050) window, when using row level security for the company's email accounts, you were able to select an email account you should not have access to in many of the windows. This has now been fixed.	🔲	8.77.0
Changes on shared report templates not saved correctly	Earlier, when editing existing report templates that were shared, you could experience that your changes were not saved correctly. This has now been fixed.	🔲	8.92.0

SFTP file synchronisation type error	In the File synchronisation (SM202510/SM202530) window, when using SFTP file synchronisation type, you could get error message "SqlDateTime overflow" during import. This has now been fixed.	🔴	8.65.0
Branch selector switching back to previous branch	Selecting branch in Branch selector: When selecting branch in selector for companies with multiple branches, the information in top rightmost corner could sometimes show a different branch than the one selected and logged into. This has now been fixed.	🔴	8.74.0
Sending reports based on Analytical Report Manager by email	On reports based on Analytical Report Manager, when you clicked the Send button after running the report, nothing happened in the UI. Now clicking Send opens the Email activity (CR306015) window and you can send the report by email.	🔴	8.45.0
Broken access controls in Screen ID URL query	Previously, users without any Administrator role were not able to see the 'Row-level security' and 'Layout templates' sections. Despite that, they were able to access some of the screens of these sections by typing the screen ID into URL. This was possible because the license restrictions of those screens were weaker than their parent section. The license was fixed by: - 'General ledger accounts by branch access' (GL103040), 'Subaccounts by branch access' (GL103060), 'Restriction groups by subaccount' (GL104030) screens are not accessible anymore without any Administrator role - Layout templates is visible for Financials User and its child screens are accessible according to their license - The 'Report list' (RE000000) screen is accessible for Administrator roles only	🔴	8.56.0
Adding a new category not working in Edit menu	In the Edit menu, in the Menu settings routine when creating a new category, you were not able to use the mouse to save the category. The dialogue was in the inactive state. This has now been fixed.	🔴	8.42.0
Issues in ARM reports with grouped unit set for branches	Earlier, only the values from the first node were given in ARM reports using unit sets with group nodes.

This has now been fixed and you get the sum of the nodes as well as the values on all nodes. | 🔴 | 8.39.0 |
| Errpr in ARM report with branches | Earlier, if you had made a filter in the From branch column on an ARM report and not requested the Branch column, you got an error running the report.

This has now been fixed and you do not need to fill out the To branch column, if the report is running for only one branch without showing the branch in the report window. | 🔴 | 8.39.0 |
| Combining alphanumeric and numeric branch IDs in ARM report | In the previous version, you sometimes got an error when running an ARM report if you combined alphanumeric and numeric branch IDs. This was depending on the selected order the of branches, so in some cases it failed and in others it did not.

This has now been fixed so that a mix of numeric and alphanumeric values are allowed for branches, without giving a conversion error when running the report.

Due to this change, the improvement where selecting only numeric values in From and tT branch had to be reversed. So if you select from branch 1 to branch 3, it will also include branches 10, 11, and 111 if you have those.

A workaround is to renumber all branches so that they all have the same length by adding leading or trailing zeros. | 🔴 | 8.39.0 |
| Audit cannot be activated in the Users and User roles windows | Audit (SM205510) It was not possible to set up auditing for the following screens (under Configuration-User Security-Configuration-Manage): Users (SM201010) User roles (SM201005)

This has now been fixed. | 🔴 | 8.40.0 |

Changes in the User list report (SM65050S) window	In the User list report (SM65050S) window, the columns Type, The account is activated, and Locked account have been removed. There are also some minor changes in the layout	🟥	8.47.0
New changes on Visma.net Project Advanced Allocation and Billing	The Run allocations by projects window (PM502500) and Reverse not yet invoiced transactions window (PM505000) are now only available Visma.net Project Advanced Allocation and Billing for Project Controller and Project Manager roles.	🟥	8.34.0
Revoking access rights not working	When setting access right "Revoke" on a user role in generic inquiries created by users in the system and assigning the role to a user, the user still got access to the inquiry. This has now been fixed.	🟥	8.35.0
Importing files into several screens fails	Version 8.33 includes a fix for an error which made it impossible to upload Excel files to several entry screens (e.g. PM208000, GL301000, SO301000, and AP202010).	🟥	8.33.0
Newly created filters not appearing in Publish updates to companies window	In the Publish updates to companies window (CS10301S), not all data was shown when filtering on column values (filters, generic inquiries,+). This has now been fixed.	🟥	8.30.0
ID error in automation schedules with filter or condition values set	In the Automation schedules (SM205020) window, if filter or condition values were set on BranchID, VendorID, CustomerID, or other IDs, you sometimes got error message "ID is not found" when you saved the schedule. This has now been fixed.	🟥	8.33.0
Nordic and special characters in report titles of duplicated reports	In the Report list (RE000000) window, it was not possible to use nordic and special characters in the report title of a duplicated report. This has now been fixed.	🟥	8.26.0 (8.26.0 8.1036)
Set site and report logo on main company	For companies with branches, there was a problem in saving logos on the main company after uploading. You got an error message and the change was lost. This has now been fixed.	🟥	8.48.0
Missing UI translations in the Deferral schedule summary (DR401000) window	There were missing UI translations in the Deferral schedule summary (DR401000), which have now been added. Other UI translations in Finnish have also been improved.	🟥	8.30.0
Copy DPLM column sets	The column sets DPLM2, DPLM3 and DPLM5 contain an error in the column range for the first line in the heading column F. It referred to column D. When you tried to copy the column set you got an error message. This has been fixed for new companies but for customers who have started before version 8.25, and made any changes in the column set, the value has to be changed from D to F manually if they want to copy the column set.	🟥	8.25 (20090 8)
Sum not calculated correctly in generic inquiries	Sometimes, when using the function "Total aggregate function" in generic inquiries, the sum was not calculated correctly when appling filters for the inquiry. This has now been fixed.	🟥	8.26.0 (8.26.0 8.1036)
Swedish postal codes updated for 2020	In the Postal codes (CS20401S) window, the Swedish postal codes have been updated with the latest changes.	🟥	8.25 (20090 8)
Generic inquiries with Total aggregate function on columns with hour:min format	Earlier, in generic inquiries, when using the Total aggregate function on columns with hour:min format, the total value was not displayed in this format. This has now been fixed.	🟥	8.90.0
Reports from Send reports in US English instead of the user's language	In the Send reports (SM205060) window, when sending reports, the reports were generated in the US EN language instead of the language of the user sending the report. This has now been fixed.	🟥	8.41.0
Wrong calculation with depreciation method "Dutch method 2" and salvage amount	When the fixed asset had a salvage amount, calculation was done wrong when using the depreciation method "Dutch method 2". This has now been fixed.	🟥	8.32.0
Wrong company on duplicate tab	Duplicate tab - wrong company: When using the browser functionality for duplicating a tab (right click on a tab), you could sometimes be logged into the previous company you where logged in to. This has now been fixed.	🟥	8.74.0

API

Release Notes.	Documentation	T	Ret versi
More context fields in Webhook notifications	Webhook notifications will now contain more context fields: ApiClientId (if notification was triggered by an API, identifies the API integration client) TenantId (identifies the tenant/company) ConnectId (identifies the user) IsScheduler (true if notification was triggered by a scheduled task, otherwise false)	☑	9.30.0
Remove deprecated parameters in Financial Period endpoint	The numberToRead and skipRecords parameters for the financial period endpoint are deprecated and will be removed.	☑	9.36.0
Possibility to filter on warehouse and towarehouse	You are now able to filter on Warehouse and ToWarehouse when fetching InventoryTransfer.	☑	9.41.0
Changes on filtering options for paymentType on Customer Payment endpoint	Previously, when using API GET Customer Payment endpoint the response message was containing records of types Cash Sale and Cash Return shown as type Payment as well as any other unclassified types. This has now been fixed. The response message contains the same payment types as found in the Customer Payment window (AR302000) and the paymentType filter parameter has a new option "Undefined" for unclassified types	☑	9.32.0
Performance improvement on API for Purchase order endpoint.	The performance of the PurchaseOrder endpoint has been improved up to 17%.	☑	9.56.0
Branch filtering for JournalTransaction endpoint to be applied on transaction instead of batch	At this moment, the Branch filter on the JournalTransaction endpoint is applied on batch level. It will be switched to be applied on transaction level instead of batch. This change will be enforced starting the 20th of June 2023. The ones willing to switch to this new approach earlier can contact the partners, support, or development team.	☑	9.52.0
Creation of new supplier invoices accelerated	Earlier, if you had a lot of supplier invoices in your company, the creation of new supplier invoices took a longer and longer time. This has now been fixed.	☑	8.80.0
Breaking change on JournalTransaction endpoint	The POST methods /api/v2/journaltransaction/{journalTransactionNumber}/attachment and /api/v2 /journaltransaction/{journalTransactionNumber}/{lineNumber}/attachment are deprecated and has been removed . Start using the new methods: - POST /api/v2/journaltransaction/module/{module}/{journalTransactionNumber}/attachment - POST /api/v2/journaltransaction/module/{module}/{journalTransactionNumber}/{lineNumber}/attachment	☑	8.86.0
GET StocktakeV2 endpoint is missing "baseUnit" on lines	Earlier, the GET Stocktake endpoint, in version V2, didn't return "baseUnit" for stocktake lines. This has now been fixed	☑	8.71.0
Pagination parameters wrongfully introduced for VatCatergory Endpoint in swagger documentation	Even though the 'VatCategory' endpoint does not support pagination, the 'PageSize' and 'PageNumber' parameters were exposed in Swagger documentation. Now they have been removed.	☑	8.56.0
New parameters "pageNumber" and "pageSize" in ExpenseClaim endpoint	Two new parameters "pageNumber" and "pageSize" are now available in the ExpenseClaim endpoint. Also the Swagger documentation has been updated with the pagination enforcement notice.	☑	8.70.0
JournalTransaction endpoint deprecated and replaced with new one	The JournalTransaction endpoint is deprecated and it has now been removed. A new endpoint was created to replace it. See the Swagger documentation for more information under the 'JournalTransactionV2' endpoint.	☑	8.46.0

Breaking change on Project endpoint for GET operation	Paging will be enforced on Project endpoint. The ISV must start implementing paging on this endpoint as soon as possible. The default page size is planned to be set to 500. If you do not specify a page size, you will get 500 records, and if you try to specify a higher number, you will only get 500 records. Example: If you do a GET ALL on Project, without specifying any paging, you will get the first 500 records only.	☑	8.97.0
Breaking change on Currency endpoint	The PUT, POST and GET v1/currency/ExchangeRates methods are deprecated and will be removed on January 11th, 2022. Start using the new methods under v2/currencyRate.	☑	8.79.0
Deprecated PUT, POST and GET v1/currency /ExchangeRates methods	The PUT, POST and GET v1/currency/ExchangeRates methods are deprecated and will be removed on November 16th 2021. Start using the new methods under v2/currencyRate.	☑	8.60.0
API Swagger documentation has been updated	We have received numerous feedback from ISVs that the new format of the swagger documentation is not very user-friendly. We have therefore reformatted the swagger documentation, so it has the same look and feel as the previous versions.	☑	8.65.0
As an ISV i need to get the Document text on VAT in the company language	The Vat API has been modified and a parameter for Language is added. The parameter is used to return the Document text in wanted language if empty the English (en-GB) will be used as before. Valide languages are: da-DK Dansk en-GB English (UK) en-US English (US) fi-FI Soumi nb-NO Norsk nl-NL Nederlands sv-SE Svenska	☑	
New endpoint GET api/v2 /PurchaseReceipt introduced	New endpoint GET api/v2/PurchaseReceipt with higher performance than v1-endpoint is introduced	☑	9.59.0
New section "childRecord" available on the CustomerInvoice GET operation	A new section "childRecord" is now available on the following endpoints' response message: -GET/controller/api/v1/customerinvoice -GET/controller/api/v1/customerinvoice/{invoiceNumber} This shows the details of the child customer for which the invoice has been sent to the parent customer.	☑	9.76.0
Deprecated fields on Account endpoint	The following fields are deprecated and will be removed on 20th of February 2024: - ExternalCode1 - ExternalCode2 - AnalysisCode They should be replaced by fields: ExternalCode1Info, ExternalCode2Info, AnalisysCodeInfo, which contain more details.	☑	9.70.0
Improved API error handling for Project endpoint	The API error handling for the Project endpoint has been improved to show correct messages	☑	8.23 (200609)
Remove old 'GeneralLedgerBalance' endpoint	The 'GeneralLedgerBalance' endpoint is deprecated and will be removed on 9th of February 2021. A new endpoint was created to replace it. You find the documentation for it in Swagger under the 'GeneralLedgerBalanceV2' endpoint.	☑	8.36.0
Forced pagination in Subaccount endpoint	Now, there is forced pagination in the Subaccount endpoint: - If no pagination is specified, only 100 records will be returned - If pagination is used but the max. page size is more than 100, then only 100 records will be returned - maxPagesize info has been added as metadata in response	☑	F2020 05
Forced pagination in CustomerDocument endpoint	Now, there is forced pagination in the CustomerDocument endpoint: * If no pagination is specified, only 100 records will be returned * If pagination is used but the max. page size is more than 100, then only 100 records will be returned * maxPagesize info has been added as metadata in response	☑	F2020 05

Improved API error handling for Subaccount endpoint	We have improved API error handling for the Subaccount endpoint so that it now shows the correct messages.	☑	8.24 (200623)
Improved API error handling for ProjectTransaction endpoint	We have improved API error handling for ProjectTransaction endpoint to show correct messages.	☑	8.23 (200609)
Improved API error handling for Timecard endpoint	We have improved API error handling for the Timecard endpoint so that it now shows the correct messages.	☑	8.24 (200623)
Improved API error handling for Dimension endpoint	The API error handling for the Dimension endpoint has been improved to show correct messages.	☑	8.23 (200609)
Forced pagination in CustomerInvoice endpoint	Now, there is forced pagination in the CustomerInvoice endpoint: - If no pagination is specified, only 100 records will be returned - If pagination is used but the max. page size is more than 100, then only 100 records will be returned - maxPagesize info has been added as metadata in response	☑	F202005
Forced pagination in SalesOrder endpoint	Now, there is forced pagination in the SalesOrder endpoint: - If no pagination is specified, only 100 records will be returned - If pagination is used but the max. page size is more than 100, then only 100 records will be returned - maxPagesize info has been added as metadata in response	☑	F202005
Forced pagination in SalesOrderBasic endpoint	Now, there is forced pagination in the SalesOrderBasic endpoint: - If no pagination is specified, only 100 records will be returned - If pagination is used but the maxPagesize is more than 100, then only 100 records will be returned - maxPagesize info has been added as metadata in response	☑	8.24 (200623)
Forced pagination in Shipment endpoint	Now, there is forced pagination in the Shipment endpoint: - If no pagination is specified, only 100 records will be returned - If pagination is used but the maxPagesize is more than 100, then only 100 records will be returned - maxPagesize info has been added as metadata in response	☑	8.24 (200623)
Pagination forced in SupplierDocument endpoint	Pagination is now forced in the SupplierDocument endpoint: * If no pagination is specified, only 100 records will be returned * If pagination is used but the maximum page size is more than 100, then only 100 records will be returned * The maxPagesize info has been added as metadata in response	☑	8.22 (200526 Release)
Pagination forced in PurchaseOrder endpoint	Pagination is now forced in the PurchaseOrder endpoint: * If no pagination is specified, only 100 records will be returned * If pagination is used but the maximum page size is more than 100, then only 100 records will be returned * The maxPagesize info has been added as metadata in response	☑	8.22 (200526 Release)
Pagination forced in Location endpoint	Pagination is now forced in the Location endpoint: * If no pagination is specified, only 100 records will be returned * If pagination is used but the maximum page size is more than 100, then only 100 records will be returned * The maxPagesize info has been added as metadata in response	☑	8.22 (200526 Release)
More APIs updated with help text in Swagger	The following APIs have been updated with help text in Swagger. * Account * CashTransaction * Currency * FinancialPeriod * GeneralLedgerBalance * GeneralLedgerTransaction * Ledger * Vat The column numberToRead integer and skipRecords integer now include information that they will be terminated and replaced later. The Period and Date columns now include information about the format.	☑	8.24 (200623)

Internal ID added to API response for Customer and Inventory endpoints	There is a new field "vnfinternalid" in the response message on the Post operation on Customer and Inventory endpoints. It can be used by third party integrators to make the connection to a unique identifier of the customer and stock item	☑	8.25 (200908)
Pagination forced in PurchaseOrder endpoint	Pagination is now forced in the PurchaseOrder endpoint: * If no pagination is specified, only 500 records will be returned * If pagination is used but the maximum page size is more than 500, then only 500 records will be returned * The maxPagesize info has been added as metadata in response	☑	8.25 (200908)
Set another max. page size for GeneralLedgerTransaction and Balance endpoints	Previously, the MaxPageSize setting was common for the entire API. We were not able to change it just for a certain endpoint. Because the general ledger endpoints export a big amount of data, sometimes we want to increase the MaxPageSize only for those endpoints to speed up the data transfer. Now we introduced an individual MaxpageSize setting for GeneralLedgerTransactions, GeneralLedgerBalanceV2 and JournalTransactionV2	☑	8.30.0
Increased max page size	The default /max page size has been temporarily changed from 500 to 1000 for all endpoints where we have pagination and had max page size = 500.	☑	8.26.0 (8.26.0 8.1036)
Swagger documentation on GET operation of Cash sales endpoint updated with pagination enforcement notice	Swagger documentation on GET operation of Cash sales endpoint is updated with the pagination enforcement notice.	☑	8.70.0
Swagger documentation on GET operation of Employee endpoint updated with pagination enforcement notice	Swagger documentation on GET operation of Employee endpoint is updated with the pagination enforcement notice.	☑	8.70.0
Pagination metadata in projectTransactions endpoint	To the ProjectTransaction endpoint has been added the Metadata total count field so that third party integrators and partners can now implement pagination on this endpoint.	☑	8.25 (200908)
Forced pagination added on several endpoints	The Employee, Payment, SupplierPayment and ProjectBasic endpoints now include the Metadata total count field. There is also enforced pagination with the maximum page size 500, so that third party integrators and partners can now implement pagination on these endpoints.	☑	8.25 (200908)
New endpoints for Organisation (Companies)	There are the following new endpoints for company: - GET organization/{organizationNumber}, - GET organization - PUT organization/banksettings The API returns the same information as for branches. In addition, there are settings for getting branches and bank settings.	☑	8.43.0
Improved performance on GET ALL Supplier endpoint	The performance of the GET ALL Supplier endpoint has been improved. The pilot testing phase is now completed, the improvement which has been deployed under a feature toggle is now enabled for all customers in production.	☑	8.89.0
Validate syntax of provided webhook address in API request with erp-api-background	Earlier, the webhook address provided in the erp-api-background request header has not been validated, therefore, it was causing an exception if a bad URL was provided. This has now been fixed.	☑	8.89.0
Change in MaxPageSize for the GET Inventory endpoint	MaxPageSize for GET Inventory will be set to 5000 from 1 April 2022.	☑	8.89.0
Breaking change on Inventory endpoint for GET operation - better error handling	In the current solution, if you try to filter on an attribute on inventory which does not exist, you get an empty JSON response. So, if you have misspelled or are trying to filter on an attribute that does not exist, you will not get any indication about this. From version 9.01.0, the system will return 400 Bad Request for this operation, and gives an error message that the value you are trying to filter on does not exist. - Example: {"message":"Attribute 'ACTIVE2' not found"}	☑	9.01.0

The performance of the GET Inventory endpoint improved	The performance of the GET Inventory endpoint has been improved, leading to quicker response time. This has been in pilot testing for several weeks now and will be enabled for all customers with version 8.91.0 of Visma.net ERP.	☑	8.91.0
Breaking change on Branch endpoint	The following fields will be removed from GET Branch methods response: - Currency -> isBaseCurrency - Currency -> isUsedForAccounting - VatZone -> defaultVatCategory	☑	
The performance of the GET Supplier Invoice endpoint has been improved	The performance of the GET Supplier Invoice endpoint has been improved, leading to quicker response time. This has been in pilot testing for 2 weeks now and will be enabled for all customers with version 8.84.0 of Visma.net ERP.	☑	8.84.0
Breaking change on Inventory endpoint for GET operation	Paging has been enforced on Inventory endpoint. The default page size is set to 5000. If you do not specify a page size, you will get 5000 records, and if you try to specify a higher number, you will only get 5000 records. Example: If you do a GET ALL on Inventory, without specifying any paging, you will get the first 5000 records only. With this improvement, ISV's are encouraged to increase their pagesize on this endpoint so that they can fetch more data in one go.	☑	8.91.0
New field in the API response message for the Project endpoint	In order to improve the connection with third party integrators we included a new field ("VnfInternalID") in the API response message for the Project endpoint. The field represents the unique identifier of the project.	☑	8.24 (200623)
Forced pagination and max. page size on several endpoints	Now, there is forced pagination in the Country, VatZone, DeferralCode, purchaseOrderBasic, customerSalesPrice, inventoryAdjustment, inventoryIssue, generalLedgerTransactions, inventoryTransfer, salesOrderType, CashSale, CustomerCreditNote, customerCreditWriteOff, customerOverdueCharge, and location/{baccountId} endpoints: - If no pagination is specified, only the maxPagesize will be returned - If pagination is used but the page size is greater than the maxPagesize, then only the maxPagesize records will be returned - The maxPagesize info has been added as metadata in response The maxPagesize variable should not be hardcoded as it can be changed without notifcation, based on our monitoring.	☑	8.25 (200908)
Forced pagination in Inventory endpoint	Now, there is forced pagination in the Inventory endpoint: - If no pagination is specified, only 100 records will be returned - If pagination is used but the max. page size is more than 100, then only 100 records will be returned - maxPagesize info has been added as metadata in response	☑	F202005
New field "consolidateInvoices" available on the Customer endpoints	A new field "consolidateInvoices" is now available on the following endpoints' response message: -GET/controller/api/v1/customer/{customerCd} -GET/controller/api/v1/customer -POST/controller/api/v1/customer -PUT/controller/api/v1/customer/internal/{internalID} -PUT/controller/api/v1/customer/{customerCd} This shows if the customer has the Consolidate invoices check box selected in the Customers (AR303000) window. The API documentation will be updated after the pilot phase is done.	☑	9.77.0
New section "parentRecord" available on the Salesorder GET operation	A new section "parentRecord" is now available on the following endpoints' response message: -GET/controller/api/v1/salesorder -GET/controller/api/v1/salesorder/{orderNbr} -GET/controller/api/v2/salesorder -GET/controller/api/v2/salesorder/{orderNbr} This shows the details of the parent customer to which the invoice has been sent from the child customer.	☑	9.77.0
New Background API functionality	Now you can invoke all API endpoints available at Visma.net ERP API documentation in an asynchronous mode by using the new Background API functionality. You find the documentation including sample code in the Developer Community.	☑	8.88.0
Improved performance of POST v1/purchaseorder	The POST v1/purchaseorder endpoint is now up to 1,6 times faster than before.	☑	9.78.0
New endpoint GET api/v2 /salesorder introduced	A new endpoint GET api/v2/salesorder has been introduced. This endpoint has a higher performance than the v1 endpoint.	☑	9.59.0
Branch endpoint uses UTC for lastModifiedDateTime	To get a range of branches, it's possible to use the lastModifiedDateTime parameter. This is provided in the format YYYY-MM-DD HH:MM:SS and is now based on UTC time.	☑	8.81.0

Performance improvement on API for Purchase receipt endpoint.	The performance of the PurchaseReceipt endpoint has been improved up to 15%.	☑	9.56.0
Performance improvement in Sales order window	The performance of the Sales order (SO301000) window has been improved up to 76%.	☑	9.55.0
Breaking change on Branch endpoint	The following flags on the Branch endpoint will be set to false by default starting the 11th of October 2022: - expandAddress - expandContact - expandCurrency - expandVatZone - expandLedger - expandIndustryCode - expandDeliveryAddress - expandDeliveryContact - expandDefaultCountry	☑	9.18.0
Improved performance of PUT v1 /purchaseorder/ {purchaseOrderNumber]	The performance of the PUT v1/purchaseorder/{purchaseOrderNumber] endpoint has been improved. Updating lines is now approx. 40 % faster than before.	☑	9.83.0
Deprecated fields on Account endpoint	The following fields are deprecated and will be removed on 20th of February 2024: - ExternalCode1 - ExternalCode2 - AnalysisCode They should be replaced by fields: ExternalCode1Info, ExternalCode2Info, AnalisysCodeInfo, which contain more details.	☑	9.82.0
New endpoint for adding lines to an open shipment: .../api/v1 /shipment/{shipmentNumber} /action/addLine	New endpoint for adding lines to an existing shipment: .../api/v1/shipment/{shipmentNumber}/action /addLine. With this, it is now possible to add new lines to open shipments. These lines are automatically added to the original sales order as well.	☑	9.59.0
Extended CustomerDebitNote endpoint to support SendToAutoInvoice functionality	There is a new endpoint "api/v1/customerDebitNote/{debitNoteNumber}/action/sendToAutoInvoice" to support the created SendToAutoinvoice functionality.	☑	8.78.0
Extended CustomerCreditNote endpoint to support SendToAutoInvoice functionality	There is a new endpoint "api/v1/customerCreditNote/{creditNoteNumber}/action/sendToAutoInvoice" to support the created SendToAutoinvoice functionality.	☑	8.78.0
Extended Customerinvoice endpoint to support SendToAutoinvoice functionality	There is a new endpoint "api/v1/customerinvoice/{customerInvoiceNumbe}/action/sendToAutoInvoice" to support the created SendToAutoinvoice functionality.	☑	8.78.0
Support correction of sales invoice by API endpoint	Correction of sales invoices by a new API endpoint POST customerinvoice/{SalesInvoiceNumber}/action/correct is now supported with same functionality as we have for this feature in the UI. There is now a new way of correcting invoices, which requires less steps to update/correct an invoice than the previous standard reversal process. You can find the "Correct invoice" feature under the Actions drop-down list button in the Sales invoices (AR301000) window. When using the "Correct invoice" feature, the system will automatically create a copy of the original invoice that can be further edited. In the background, when releasing this new invoice, the system will automatically create a sales credit note for the original invoice and will match it against the chosen invoice to be corrected. As a note the original invoice will remain in status Open until the new corrected document will be finally released, but will no further be included in the payment process. Correcting of invoices with lines from the Shipments (SO302000) or Sales orders (SO301000) windows is currently not supported.	☑	8.73.0
New replacement for the 'GeneralLedgerBalance' endpoint	The 'GeneralLedgerBalance' endpoint is deprecated and will be removed in August 2020. A new endpoint was created to replace it. The documentation for it can be found on Swagger under the 'GeneralLedgerBalanceV2' endpoint.	☑	F2020 05
JournalTransaction endpoint replaced with JournalTransactionV2 endpoint	The 'JournalTransaction' endpoint is deprecated and will be removed in September 2020. A new endpoint was created to replace it. You find the documentation in Swagger under the 'JournalTransactionV2' endpoint.	☑	8.24 (20062 3)

GET inventory range and GET inventory specific endpoints now have support for returning LotSerialClass	Added support for returning LotSerialClass in GET api/v1/inventory/{inventoryNumber} and GET api/v1/inventory endpoints	☑	8.98.0
New endpoint /api/v1/shipment/[shipmentNbr]/action/deleteLine/[shipmentLineNbr] introduced	You can delete a line that was added to a shipment by mistake, by using the new endpoint api/v1/shipment/[shipmentNbr]/action/deleteLine/[shipmentLineNbr].	☑	9.59.0
SupplierInvoice endpoint - Purchase receipt line can now be added or linked more than once inside the same purchase invoice document	Behaviour implemented in the Purchase invoices (AP301000) window with earlier version 9.60. With version 9.61, the implementation is included into the SupplierInvoice API endpoint. Purchase receipt line can now be added or linked into multiple invoice lines inside the same purchase invoice document with POST and PUT operations.	🔖	9.61.0
Improvements in the GET Account API endpoints	There are improvements in the GET Account API endpoints. Both, the 'Get a specific account' and the 'Get a range of accounts' endpoint will include values for: - Control account module - Allow manual entry - Public code - External code 1 - External code 2 - Analysis code in their responses. In addition, it is possible to set filters on - Public code - External code 1 - External code 2 - Analysis code in the 'Get a range of accounts' endpoint.	🔖	9.68.0
Branches added to SupplierPayment endpoint	You are now able to GET/POST/PUT the Branch field via the SupplierPayment endpoint.	🔖	9.27.0
Delete operation implemented for supplier details in PUT Inventory endpoint	The Delete operation has been implemented for the supplier details in the PUT Inventory endpoint, which can be used to delete supplier information on a specific inventory item.	🔖	9.28.0
New handling of subaccount segments in Post JournalTransactionsV2	In the Post JournalTransactionsV2 it is now possible to provide subsets of the subaccount segments. The omitted segments will be assigned the default values as specified in the General ledger preferences (GL102000) window. For transaction lines including a cash account, the default subaccount as specified in the Cash accounts (CA202000) will be applied.	🔖	8.91.0
Support for webhook notification on delete shipment	Previously webhook notification when deleting a shipment was not supported. We have now added DELETED support on shipment_changed notification. The makes it possible for integrations to be aware of when a shipment is deleted, and react upon such an event.	🔖	8.71.0
Cost property added to customerInvoice, customerDebitNote, customerCreditNote and customerOverdueCharge lines	The GET and GET range customerInvoice, customerDebitNote, customerCreditNote and customerOverdueCharge now include Cost property for the lines. This value reflects the total cost for the line in the base currency, when the document is released. This enables you to calculate profit and margin for the line, when compared with the line's Amount.	🔖	9.04.0
Create transfer receipts through POST Purchase receipt endpoint	You are now able to create transfer receipts through POST Purchase receipt endpoint.	🔖	8.41.0
"Reverse and Apply to Memo" action on CustomerInvoice endpoint to trigger creation and automatic application of a credit note	There is a new action "Reverse and Apply to Memo" in the CustomerInvoice endpoint, which triggers creation and automatic application of a credit note to a sales invoice. This is the same functionality as in the user interface.	🔖	8.52.0
The field KitItem not exposed in the Inventory DTO	Earlier, the field KitItem was not exposed in the Inventory DTO. This has now been fixed.	🔖	9.04.0
Allocation for purchase receipt with lot/serial numbers	Earlier, you got an error message when adding a purchase order or purchase order lines to a receipt with the POST/action and if Lot/serial class had the Automatically generate next option unchecked and when received. This has now been fixed.	🔖	9.04.0

DELETE operations for Expense Claim and Expense Receipt endpoints	There are now two new operations for ExpenseClaim and ExpenseReceipt endpoints, which can be used by third party integrators: - DELETE /api/v1/expenseClaim/{expenseClaimNbr} - this will allow the possibility to delete specified expense claimz - DELETE /api/v1/expenseReceipt/{receiptNumber} - this will allow the possibility to delete specified expense receipts	🔖	8.61.0
New POST operations on Expense Claim endpoint: put On hold, Submit, Send to approval	There is a new improvement on the Expense Claim endpoint. Third party integrators are now able to submit, send to approval and put On hold expense claim using the following new POST operations on the Expense Claim endpoint: - POST /api/v1/expenseClaim/{expenseClaim}/action/hold; - POST /api/v1/expenseClaim/{expenseClaim}/action/submit; - POST /api/v1/expenseClaim/{expenseClaim}/action/approval	🔖	8.49.0
New field "Tax total" now available in the response message for ExpenseReceipt endpoint	A new field "Tax total" is now available in the response message for the ExpenseReceipt endpoint for the GET operations.	🔖	8.51.0
Branch API - new columns returned on GET	The Branch APIs have been changed, and two columns have been added: BranchID that returns the PK for the branch while Number returns the viable Branch CD and isActive that returns TRUE or FALSE The message when a branch does not exist has also been changed, and it differs between a non-existing and a deleted branch. If the branch is deleted, you will get the message "Branch with number 'NN' has been deleted." Else you'll get the message "Branch is not found"	🔖	8.65.0
Additional fields included in Employee endpoint on GET operations	There are new fields: Employee class, Branch, Calendar, Employee login, and Work group ID available on the Employee endpoint for the following operations: - GET /api/v1/employee/{employeeCd} - GET /api/v1/employee	🔖	8.63.0
New operation for updating employees using Employee endpoint	There is a new operation for updating employees available on the Employee endpoint: - PUT /api/v1/employee/{employeeCd}	🔖	8.66.0
New operation for creating employees using Employee endpoint	There is a new update operation of employees available on the Employee endpoint: - POST /api/v1/employee	🔖	8.66.0
New parameters/flags to improve performance of General Ledger Transactions endpoint	There is a new parameter to avoid additional data for Account, Branch and beginning and ending balance in the query to improve the performance for this API. ExpandAccountInfo: By default, if no value is provided, True and each transaction returned will include extended information about the account. If False, the account information will include only Number, Description, Type and GlConsolAccountCD. ExpandBranchInfo: By default, if no value is provided, True and each transaction returned will include extended information about Branch (number and name). If False, the branch information will include only the branch number. IncludeTransactionBalance By default, if no value is provided, True and each transaction returned will include its balance. If False, the transactions returned will not include their balances (fields BegBalance, EndingBalance, CurrBegBalance, CurrEndingBalance)	🔖	8.60.0
Improved error response for the PUT stocktakeV2 endpoint	PUT stocktakeV2 now has an improved error response, which will help integrators solve invalid entries. The Swagger documentation for this endpoint is updated with these improvements.	🔖	8.85.0
Improved performance on GET ALL Supplier endpoint	The performance of the GET ALL Supplier endpoint has been improved, and it is currently in pilot testing. This will be tested by a small number of clients in the beginning. Once the pilot testing phase is completed, the improvement will be enabled for everyone.	🔖	8.87.0
Performance issues when using the API endpoint "PUT Stocktake V2"	The performance of the "PUT Stocktake V2" API endpoint has been improved. For example, 100 lines going from 40,2 seconds to 1,33 seconds.	🔖	9.49.0

Changes on GeneralLedgerTransactions endpoint parameters	To improve the performance of GeneralLedgerTransactions endpoint, the three new flags that were introduced in version 8.60 and that allow users to retrieve extended data if necessary (expandBranchInfo, expandAccountInfo, includeTransactionBalance) are now set to false by default. Please verify swagger documentation and if you consider the extended data is necessary, set the flags to True for your calls.	🔖	8.74.0

A new easier method to use the Currency endpoint	The currency endpoints have been changed and a new version 2 added for Exchange rate and Rate type.
	
	GET api/v1/currency and
	GET /api/v1/currency/{curyId}has been extended with new columns
	  "symbol": "string",
	  "isBaseCurrency": true, - is only returned on the currency that is the base currency.
	  "decimalPrecision": 0,
	  "isUsedForAccounting": true
	
	New version 2 of Currency rates
	GET /api/v2/currencyrate with parameter
	fromDate
	toDate
	fromCurrency
	toCurrency
	rateType
	
	Returning
	  "id": 0,
	  "fromCurrencyId": "string",
	  "toCurrencyId": "string",
	  "rateType": "string",
	  "rate": 0,
	  "effectiveDate": "2021-08-04T00:00:00",
	  "multDiv": "string",
	  "rateReciprocal": 0
	
	For POST the CurrencyRateID is removed as parameter and From and To Currency is part of the request.
	POST /api/v2/currencyrate
	  "fromCurrencyId": "string"
	  "toCurrencyId": "string"
	  "rateType": "string"
	  "effectiveDate": "2021-08-04"
	  "rate": 0
	  "multDiv": "Multiply"
	
	For PUT the request only contain Rate and MultiDiv to avoid updating an existing Rate for a other currency /ratetype by mistake.
	PUT /api/v2/currencyrate with parameter
	currencyRateId
	  "rate": 0
	  "multDiv": "Multiply"
	
	New API's for Currency rate type:
	GET /api/v2/currencyratetype
	  "id": "string",
	  "description": "string",
	  "daysEffective": 0
	
	POST /api/v2/currencyratetype
	  "id": "string"
	  "description": "string"
	  "daysEffective": 0
		🔖	8.60.0

Support for Emailed field in SalesOrder endpoint	The Emailed field is now supported in POST, PUT and GET SalesOrder, enabling integrators to update a specific sales order to reflect email communication with the customer regarding this sales order in any external system.	🔖	8.80.0
SupplierInvoice endpoint - Purchase receipt line can now be added or linked more than once inside the same purchase invoice document	Behaviour implemented in the Purchase invoices (AP301000) window with earlier version 9.60. With version 9.61, the implementation is included into the SupplierInvoice API endpoint. Purchase receipt line can now be added or linked into multiple invoice lines inside the same purchase invoice document with POST and PUT operations.	🔖	9.61.0

PUT/POST/DELETE discount via API	You are now able to PUT/POST/DELETE a discount via API. See the swagger documentation for more information.	🔖	8.25 (200908)
Created from available in KitAssembly endpoint	The field Created from is now available in the KitAssembly endpoint. It is called SalesOrderLink. See the swagger documentation for more information.	🔖	F2020 05, Visma. Net ERP Kanba n week 24, Visma. Net ERP Week 24
Stock item and kit allocation via KitAssembly endpoint	Allocations for stock items and kit allocation are now available via the KitAssembly endpoint. See the swagger documentation for more information.	🔖	F2020 05, Visma. Net ERP Kanba n week 24, Visma. Net ERP Week 24
Create allocations in KitAssembly endpoint	You have now the possibility to create and update Kit allocation via the KitAssembly endpoint. See the swagger documentation for more information.	🔖	F2020 05, Visma. Net ERP Kanba n week 24, Visma. Net ERP Week 24

New endpoint for General Ledger Balances created	A new version of 'GeneralLedgerBalance' is implemented. The data format is the same as the previous one, but there are some key changes related to how to use the new endpoint. A new parameter is introduced: LastModifiedDateTime It is mandatory to provide at least one of the parameters: LastModifiedDateTime and/or PeriodId. When the 'LastModifiedDateTime' parameter is set, only the balances changed since the provided date and time will be exported. This implementation will improve the performance on the client-side since the amount of data to be fetched is significantly reduced. The consequence of this implementation is that a balance for a combination (of account, subaccount, ledger, branch, period) will not be generated - if the balance on that financial period was not changed and no record is registered for it. If the client still needs the balances for all combinations (of account, subaccount, ledger, branch, period) even though it was not changed in a certain period, there are three options: - If the endpoint exported no balance for a certain financial period, then identify the balance of the closest financial period smaller than the financial period under discussion, and construct your current balance based on that. This is the most appropriate solution for integrations saving the data on their own database. It is a win-win solution for both Visma.net ERP and the integrator. - Use the 'LastModifiedDateTime' parameter on a daily basis. At the beginning of each month; call once the endpoint with the upcoming month as the period parameter, so all balances are generated. This is the second most recommended solution. - Use the endpoint without the 'LastModifiedDateTime' parameter and get balances period by period. This is not recommended since you will never know which data was changed, and you will get all of it each time even though most of it is already on your side. Pagination is enforced, and the maximum page size is 100. If the page size is not provided or it is greater than 100, then it will be automatically set to 100. If the page number is not provided, then it will be automatically set to 1. Note: The old endpoint will be marked as deprecated and will be removed in three months.	🔖	F2020 05
Update projects with tasks with restrictedEmployee when using PUT API endpoint	You are now able to update projects that have tasks with restrictedEmployee when using the PUT API endpoint: /controller/api/v1/project/{projectId} and /controller/api/v1/project/internal/{internalId}	🔖	F2020 05
Fetch information on customer and commission history in Salesperson endpoint	You are now able to fetch information related to customer and commission history in the Salesperson endpoint. See the swagger documentation for more information.	🔖	8.24 (20062 3)
GET and POST Project Cost and Revenue Budget via ProjectBudget endpoint	You are now able to GET and POST Project Cost Budget via the ProjectBudget endpoint. See swagger documentation for more information.	🔖	F2020 05, Visma. Net ERP Kanba n week 24, Visma. Net ERP Week 24
GET/POST/PUT notes on header and line in ProjectTransaction endpoint	You are now able to GET/POST/PUT notes on header and line in the ProjectTransaction endpoint. See swagger documentation for more information.	🔖	F2020 05, Visma. Net ERP Kanba n week 24, Visma. Net ERP Week 24

Wrongfully logged REST API errors fixed	AccountController Endpoints: The BadRequest Error thrown by API validators were wrapped by InternalServer Error before. This is now removed. PUT - "api/v1/account/{accountCd}" - Updating of Account object will give HTTP BadRequest - 400 error if the input is invalid. POST - "api/v1/account" - Creating of Account object will give HTTP BadRequest - 400 error if the input is invalid. CashSaleController Endpoints: The BadRequest Error thrown by API validators were wrapped by InternalServer Error before. This is now removed. POST - "api/v1/cashsale" Creating of CashSale object will give HTTP BadRequest - 400 error if the input is invalid. CashTransactionController Endpoints: The BadRequest Error thrown by API validators were wrapped by InternalServer Error before. This is now removed. POST - "api/v1/cashTransaction" - Creating of CashTransaction object will give HTTP BadRequest - 400 error if the input is invalid. action/reverse - "api/v1/cashTransaction/{referenceNbr}/action/release" Reversing a cash transaction will give HTTP BadRequest - 400 error if the input is invalid. FinancialPeriodController Endpoints: FinancialPeriodNotSetup error thrown by system was not caught properly earlier. This is now handled. GETALL - "api/v1/financialPeriod" - If financial periods are not set up during FirstTimeStartup - HttpStatusCode.NotFound is thrown with proper error message GET by Id - "api/v1/financialPeriod/{financialPeriodId}" - If financial periods are not set up during FirstTimeStartup - HttpStatusCode.NotFound is thrown with proper error message	🔖	8.25 (200908)
GET only projects and tasks with restrictedEmployee when using GET API endpoint	You are now able to GET only the projects and tasks that have restrictedEmployee when using the GET API endpoint: /controller/api/v1/project/tasks	🔖	F202005
POST projects with tasks with restrictedEmployee in POST API endpoint	You are now able to POST projects that have tasks with restrictedEmployee when using the POST API endpoint: /controller/api/v1/project.	🔖	F202005
GET only projects and tasks with restrictedEmployee when using GET API endpoint	You are now able to GET only the projects and tasks that have restrictedEmployee when using the GET API endpoint: /controller/api/v1/project	🔖	F202005
New endpoint ProjectAccountGroup	A new endpoint ProjectAccountGroup has been implemented and it can be used by third party integrators to identify all account groups or a specific account group.	🔖	8.25 (200908)
The field freightCost available via Shipment endpoint	You are now able to POST/PUT the field freightCost via the Shipment endpoint. See the swagger documentation for more information.	🔖	F202005, Visma.Net ERP Kanban week 24, Visma.Net ERP Week 24
Two new parameters available in CashTransaction endpoint	Two new parameters "pageNumber" and "pageSize" are now available in the CashTransaction endpoint on the GET operation. These filters should be used by our integrators to have a more efficient integration.	🔖	8.77.0
Rot/Rut deduction support via the sales order GET/POST/PUT endpoints	Rot/Rut deduction is now supported from the API via the sales order GET/POST/PUT endpoints.	🔖	8.32.0
New endpoint for GET projects by Internal ID	It is now possible to get the data for a project by its internalID using the new endpoint: GET /api/v1/project/internal/{internalID}	🔖	8.65.0
New endpoint for update (PUT) customers by internal ID	It is now possible to update the data for a customer by its internalID using the new endpoint: PUT /api/v1/customer/internal/{internalID}.	🔖	8.67.0

New endpoint for update (PUT) stock items by internal InventoryID	It is now possible to update the data for a stock item by its internalID using the new endpoint: PUT /api/v1/inventory/internal/{inventoryId}	🔖	8.67.0

Performance of Branch API improved	The API for Branch has been changed so that it is possible to select less data in the result set and by that get better performance.
	
	The following flags are implemented with True/False
	    expandAddress
	    expandContact
	    expandCurrency
	    expandVatZone
	    expandLedger
	    expandIndustryCode
	    expandDeliveryAddress
	    expandDeliveryContact
	    expandDefaultCountry
	    expandBankSettings (old)
	
	Their default value will be true until 13th of September 2022 and after that they will be turned to false.
	
	The "Order by" in this endpoint was by BranchCD by default, and since this is relaying on the code behind, it has been changed to a dropdown containing orderBy options (Id, Number, Name, OrganizationId, LastModifiedDateTime).
	
	Pagination has been removed from this endpoint as it has been marked as obsolete for two years.
		🔖	9.00.0

SendToAutoinvoice field available on CustomerCreditNote endpoint	You are now able to GET, POST, PUT the SendToAutoinvoice field on the customerCreditNote endpoint. See the swagger documentation for more information.	🔖	8.34.0
Beta tags removed for v2 endpoints and corresponding v1 endpoints marked as deprecated	The following methods are marked as deprecated, and will be removed from May 2021: POST customerCreditNote, customerDebitNote and customerInvoice. The v2 of the same methods, optimized for performance, should now be used instead, and the beta tag for these have now been removed.	🔖	8.26.0 (8.26.0 8.1036)
Payment settings added in the Branch API	A PUT Branch/Banksettings has also been added where you can update Bank information. The following columns on the tab Payment settings can be updated: bankName bankAddress1 bankAddress2 bankAddress3 bankCountry iban bban bbaN2 bbaN3 bic creditorId	🔖	8.43.0
Start date and End date added to SupplierInvoice endpoint	You are now able to GET/POST/PUT the fields "Term start date" and "Term end date" via the SupplierInvoice endpoint. See the swagger documentation for more info.	🔖	8.25 (20090 8)

Increase of data transferred through GeneralLedgerBalance endpoint	Previously, the table containing balances did not have the LastModifiedDateTime column. To implement filtering by LastModifiedDateTime on GeneralLedgerBalance endpoint, the column from the Transactions table was used. However, this implementation might cause some issues. Now there is the LastModifiedDateTime column in the Balances table and it is used in the API endpoint implementation. This is not a breaking change. However, the integrators should expect an increase of transferred data first time they call the endpoint after release. This behavior is determined by the new column. For the existing entries, the newly introduced column will be filled in with the current date and time. There is no way to find out exactly when a balance was changed last time, so this approach is the only solution to ensure data integrity. For example, the newly introduced column will be added during the upgrade on 8th of September 2020. For all lines the last modified date time will be set to '2020.09.08 hh:mm:ss'. Supposing an integrator had it's last synchronization on '2020.09.07 22:00:00', on next synchronization, after '2020.09.08 hh:mm:ss', the '2020.09.07 22:00:00' will be set as last modified date and time. Then there will be fetched all lines from database. This will happen only on first synchronization after upgrade. On the next ones there will be set a last modified date and time greater than '2020.09.08 hh:mm:ss' and only really changed balances will be fetched.	▣	8.25 (200908)
Get the salespersons for customer	You are now able to fetch salespersons for a given customer. See the swagger documentation for more information.	▣	8.25 (200908)
Creating new sales invoices through API optimised	There are new API v2 endpoints for POST: CustomerInvoice, CustomerCreditNote, and CustomerDebitNote have been optimised for performance. Testing with 1920 lines and setting 6 fields for each line gives 7.5 times better performance. Setting more fields for each line will give further improvement of the performance.	▣	F2020 05
New Project task endpoint with four operations	A new Project task endpoint has been created with 4 operations: Get Project Task, Get Project Task (Internal ID), Put Project task (internal ID), Post Project task (internalProjectId) that third party integrators can use to identify, create and update project tasks by the internalID (a unique identifier of the project task)	▣	8.25 (200908)
AlternateID available via the Shipment endpoint	The field AlternateID is now available via the Shipment endpoint. See the swagger documentation for more information.	▣	8.25 (200908)
Updated documentation	For the following endpoints, all parameters have updated documentation: Dimension, Department, Earning type, Employee, ExpenseClaim,ExpenseReceipt, Project, ProjectBasic, ProjectTransaction, Subaccount and TimeCard.	▣	8.23 (200609)
Wrongfully logged API errors fixed	API calls to endpoint /api/v1/webhooknotificationfeedback will now return 400 (Bad Request) when the notification passed in does not exist. The endpoint will also return 400 (Bad Request) if the passed in notification dto is not provided or invalid.	▣	8.24 (200623)
Fetch barcodes for different documents via the Inventory endpoint	You are now able to fetch barcodes for different documents via the Inventory endpoint. Following routes are now available: /controller/api/v1/inventory/barcode/stocktake/{referenceNumber} /controller/api/v1/inventory/barcode/purchasereceipt/{receiptNbr} /controller/api/v1/inventory/barcode/shipment/{shipmentNbr} /controller/api/v1/inventory/barcode/salesorder/{orderNbr} See the swagger documentation for more information.	▣	8.25 (200908)
Override number series for POST CustomerCreditNote V2	You are now able to override the number series of a customer credit note by specifying the field overrideNumberSeries=true when creating a customer credit note . This functionality has to be enabled in the Number series (CS201010) window by selecting option Allow manual numbering on imports. You also can specify a longer customer credit note when using overrideNumberSeries than what is specified in number series for customer credit note. This option is only available for V2 of the customercreditnote endpoint.	▣	8.25 (200908)
Override number series for POST CustomerInvoice V2	You are now able to override the number series of a customer invoice by specifying the field overrideNumberSeries=true when creating a customer invoice. This functionality has to be enabled in the Number series (CS201010) window by selecting option Allow manual numbering on imports. You also can specify a longer customer invoice number when using overrideNumberSeries than what is specified in number series for customer invoice. This option is only available for V2 of the customer invoice endpoint.	▣	8.25 (200908)

Override the number series of supplier invoices	You are now able to override the number series of supplier invoices by specifying the field overrideNumberSeries=true when creating a supplier invoice. This functionality has to be enabled in the Number series (CS201010) window by selecting option Allow manual numbering on imports.	🔖	8.25 (200908)
Override number series for POST PurchaseOrder	You are now able to override the number series of a purchase order by specifying the field overrideNumberSeries=true when creating a purchase order. This functionality has to be enabled in the Number series (CS201010) window by selecting option Allow manual numbering on imports. You also can specify a longer purchase order number when using overrideNumberSeries than what is specified in number series for purchase order.	🔖	8.25 (200908)
Override number series for POST Customer	You are now able to override the number series of a customer by specifying the field overrideNumberSeries=true when creating a customer. This functionality has to be enabled in the Number series (CS201010) window by selecting option Allow manual numbering on imports. You also can specify a longer customer number when using overrideNumberSeries than what is specified in segment keys for customer	🔖	8.25 (200908)
Override the number series of journal transactions	You are now able to override the number series of journal transactions by specifying the field overrideNumberSeries=true when creating a journal transaction. This functionality has to be enabled in the Number series (CS201010) window by selecting option Allow manual numbering on imports.	🔖	8.25 (200908)
Override number series for POST CustomerDebitNote V2	You are now able to override the number series of a customer debit note by specifying the field overrideNumberSeries=true when creating a customer debit note. This functionality has to be enabled in the Number series (CS201010) window by selecting option Allow manual numbering on imports. You also can specify a longer customer debit note when using overrideNumberSeries than what is specified in number series for customer debit note. This option is only available for V2 of the Customerdebitnote endpoint.	🔖	8.25 (200908)
Override number series for POST SalesOrder	You are now able to override the number series of a sales order by specifying the field overrideNumberSeries=true when creating a salesorder. This functionality has to be enabled in the Number series (CS201010) window by selecting option Allow manual numbering on imports. You also can specify a longer salesorder number when using overrideNumberSeries than what is specified in number series for salesorder	🔖	8.25 (200908)
Override number series for POST Supplier	You are now able to override the number series of supplier by specifying the field overrideNumberSeries=true when creating a supplier . This functionality has to be enabled in the Number series (CS201010) window by selecting option Allow manual numbering on imports. You also can specify a longer supplier number when using overrideNumberSeries than what is specified in segment keys for supplier	🔖	8.25 (200908)
Add filters for the endpoints CustomerInvoice, CustomerCreditNote and CustomerDebitNote	Added "paymentReference", "externalReference" and "customerRefNumber" as filters for the following endpoints: CustomerInvoice, CustomerCreditNote, CustomerDebitNote, CustomerCreditWriteOff, CustomerOverdueCharges, CashSale, Customer/{customerNumber}/invoice, Customer/{customerNumber}/cashsale.	🔖	8.33.0
LastModifiedDate is included in the GeneraLedgerBalanceV2 response	Previously the LastModifiedDate value was not included in the GeneraLedgerBalanceV2 response. This is now fixed.	🔖	8.69.0
New operations for locations on Warehouse endpoint	Two new operations have been implemented on the Warehouse endpoint: - POST operation of inventory locations which can be used by integrators for creating inventory locations on warehouses. - PUT operation of inventory locations which can be used by integrators for updating inventory locations on warehouses	🔖	8.26.0 (8.26.0 8.1036)
"Don't email" and "Don't print" added to CustomerDebitNote and CustomerCreditNote endpoints	The fields "Don't email" and "Don't print" have now been added to the CustomerDebitNote and CustomerCreditNote endpoints.	🔖	8.25 (200908)
New POST operation exposed via the Timecard endpoint for "onHold" process	There is a new POST operation for the Timecard endpoint "timeCard/{timeCardCd}/action/hold", which can be used by third party integrators to put a specific timecard On hold, which has been wrongly submitted by the user.	🔖	8.28.0
New fields added to CustomerInvoice endpoint	There are new fields in the CustomerInvoice endpoint: - Start date - End date - Accounting cost ref. - Originator document ref. - Contract document ref.	🔖	8.25 (200908)

Add allocations to kit assemblies to support industries using expiry dates or lot numbers	In API, you have the possibility to set the kit allocations for a Kit Assembly (POST / PUT), and you can now use stock items for the assembly to set the allocations for the stock items individually. This is important, for example, for food production where the different ingredients (stock components) used for producing an assembly need to have full control of the allocations, meaning the expiry date. To achieve this, the allocations for each stock component line are now exposed in the API (PUT/POST).	🔖	9.40.0
Improved error message on Project endpoint when wrong employeeID is selected	Error handling for the Project endpoint on the PUT operation has been improved. When trying to change an existing project, by adding a wrong employee, the error shows message "400 Bad request 'EmployeeID' is not found".	🔖	8.29.0
POST and PUT exchange rates via Currency endpoint	You are now able to POST and PUT exchange rates via the Currency endpoint. See the swagger documentation for more information.	🔖	8.25 (200908)
New fields available via GET /POST/PUT in InventoryIssue endpoint	The following fields are now available via GET/POST/PUT in the InventoryIssue endpoint. - Allocations - Lot/Serial number - Expiration date See the swagger documentation for more information.	🔖	8.25 (200908)
New filter "restrictedUser" for GET operations of some project API endpoints	There is a new filter "restrictedUser" for GET operation of the API endpoints Project, Project/tasks, Projectbasic and Projecttask, which can be used by third party integrators to identify the projects that are restricted to a specific ODP user ID.	🔖	8.28.0
Payment Amount in currency and Balance in currency added to the GET CustomerPayment endpoint	The paymentAmountInCurrency and availableBalanceInCurrency have been added to the GET CustomerPayment endpoint. If you are using OneStopReporting, this now allows you to create reports like Aged past due (AR63100).	🔖	9.28.0
New GET endpoints in the API for Fixed Asset	New GET endpoints in the API for Fixed Asset: fixedAsset fixedAsset/{assetID} fixedAssetTransaction fixedAssetTransaction/{RefNo} fixedAssetClass fixedAssetClass/{classID} fixedAssetPropertyTaxGroup (NL only) fixedAssetPropertyTaxGroup/{propertyTaxID} (NL only)	🔖	9.20.0
Field Bank Detail Type exposed in PaymentMethod endpoint	Previously, the Bank Detail Type field was not returned by the PaymentMethod endpoint. This has now been fixed.	🔖	9.19.0
Line note exposed on the Journal transaction endpoint	Four methods in the JournalTransactionV2 endpoint now have the line note information exposed: - GET /controller/api/v2/journaltransaction/{journalTransactionNumber} - GET /controller/api/v2/journaltransaction - POST /controller/api/v2/journaltransaction - PUT/controller/api/v2/journaltransaction/{journalTransactionNumber}	🔖	9.12.0
Filter on attributes which did not exist, gave an error message.	After the release of 8.91, if you tried to filter on attributes on inventory which did not exist, you got an error message. This was a breaking change. We have now removed the error message. The functionality will now work as before and return 200 OK, with no data. The performance improvement on inventory endpoint has been enabled again, which was initially introduced with 8.91.	🔖	8.91.1
New endpoints for LotSerialClass	There are new endpoints for GET api/v1/lotserialclass/[classId] and GET api/v1/lotserialclass.	🔖	9.03.0
New SupplierInvoice endpoint enabling sending invoices to Approval	There is a new SupplierInvoice endpoint: /controller/api/v1/supplierInvoice/{documentType}/{invoiceNumber}/action/sendtoapproval that enables sending documents to Visma.net Approval via API.	🔖	9.00.0

Missing fields now available in the CustomerInvoice, CustomerDebitNote, CustomerCreditWriteOff and CustomerCreditNote GET Endpoints	The fields ShipmentNumber, OrderType and OrderNumber are no longer missing in the following GET endpoints: Customerinvoice, CustomerDebitNote, CustomerCreditWriteOff and CustomerCreditNote.	🔖	9.18.0
The field Active available via Subaccount endpoint	The field Active is now exposed in the Subaccount endpoint. You can also filter on this field. This field will also be visible in all endpoints where SubaccountDTO is linked, for example, to customer invoice and supplier invoice. See the swagger documentation for more information.	🔖	F2020 05, Visma. Net ERP Kanba n week 24, Visma. Net ERP Week 24

Prepare invoice action now exposed via the "SalesOrder" and "SalesOrderBasic" endpoints	Two new endpoints have been introduced for the action 'Prepare invoice' for sales orders:
	
	- v2/salesorderbasic/{SOType]/{SOOrderNumber]/action/prepareInvoice
	- v2/salesorder/{SOType]/{SOOrderNumber]/action/prepareInvoice
	
	If the action is successful, the 200 OK response includes a reference number to an invoice. For example:
	
	{
	  "referenceNumber": "002625",
	  "actionId": "f9496e2a-3319-4439-bf24-7f4ced2252e5",
	  "actionResult": "Done"
	}
		🔖	9.71.0

New improved version of the JournalTransaction endpoint	A new version of the JournalTransaction endpoint has been implemented. The main changes consist of performance improvements on the method of getting journal transactions. Mandatory parameters were introduced. You have to provide at least one of the parameters: 'PeriodId' and /or 'LastModifiedDateTime'. 'LastModifiedDateTime' is not allowed to have values less than 6 months back in time. The 'Module' parameter was introduced to facilitate filtering of data for integrators interested only in certain types of transactions. 'LastModifiedDateTimeCondition' was removed since the usage of it affects the purpose of lastModifiedDateTime: it should be used to synchronize data by requesting for changed data only. The 'Released' parameter was renamed to 'ReleasedBatch' and its type was changed to boolean. The default value of 'ExpandAttachments' was changed to false. The following parameters were removed: customerSupplierStart, customerSupplierEnd, greaterThanValue. Pagination is enforced, and the maximum page size is 100. If the page size is not provided or it is greater than 100, then it will be automatically set to 100. If the page number is not provided, then it will be automatically set to 1. Note: The old endpoint will be marked as deprecated and will be removed in three months.	🔖	8.24 (20062 3)
New endpoint for Attributes	New API-methods for handling attributes are now available. See the Attributes window (CS205000) for reference.	🔖	8.25 (20090 8)
Notes field available to edit for ISVs in Stock items window	In the Stock items (IN202500) window, the Notes field on the blue ribbon in the upper right corner is now available to edit for ISVs.	🔖	9.26.0
New endpoint SupplierLocation	A new endpoint SupplierLocation has been exposed for the entry screen of Supplier locations (AP303010). GET/POST/PUT operations are supported. See the swagger documentation for further information.	🔖	9.35.0

Change shipping term on purchase orders	The field 'Shipping terms' has been added to the Shipping instructions tab of the Purchase orders window. This allows you to change the shipping term for each purchase order, if needed. The shipping term defined on the specific supplier is applied by default. Additionally, the Shipping terms field has been added to the Report designer and to the Purchase order endpoint. See the swagger documentation for additional information related to API.	🔖	8.26.0 (8.26.0 8.1036)
GET/POST/PUT salespersons via SalesPerson endpoint	You are now able to GET/POST/PUT salespersons via the SalesPerson endpoint. See the swagger documentation for more information.	🔖	F2020 05, Visma. Net ERP Kanba n week 24, Visma. Net ERP Week 24
New fields available via GET /POST/PUT in InventoryTransfer endpoint	The following fields are now available via GET/POST/PUT in InventoryTransfer endpoint. - Allocations - Lot/Serial number - Expiration date See swagger documentation for more information.	🔖	F2020 05, Visma. Net ERP Kanba n week 24, Visma. Net ERP Week 24
Three new endpoints for updating and retrieving data in Stock items window	There are three new endpoints (POST, PUT and GET) regarding inventory and crossReference. The endpoints are for updating and retrieving data in the Stock items (IN2025000) window, on the Cross-reference tab.	🔖	8.25 (20090 8)
Implementing Attachment feature for the ExpenseReceipt Endpoint (POST)	There is a new POST operation on the ExpenseReceipt endpoint "expenseReceipt/{receiptNumber} /attachment", which allows third party integrators to add attachments on expense receipts.	🔖	8.28.0
New filters for visibility settings in ProjectBasic endpoint	New filters for visibility settings have been added to the ProjectBasic endpoint and they are available for integrations	🔖	8.23 (20060 9)
Expose branch Payment settings tab in Branch endpoints	The Branch APIs have been changed and the expandBanksettings parameter can be set to get Bank information from the branches. The following columns on the tab Payment settings will be returned: bankName bankAddress1 bankAddress2 bankAddress3 bankCountry iban bban bbaN2 bbaN3 bic creditorId	🔖	8.43.0
New field Customer project no. has been added in the API GET operations for the Customer invoice endpoint	New field Customer project no. has been added in the API GET operations for the Customer invoice endpoint.	🔖	8.33.0

New field Customer project no. has been added for the Customer invoice endpoint	New field Customer project no. has been added in the API POST and PUT operations for the Customer invoice endpoint.	🔖	8.33.0
New endpoint v2/salesorder/[orderType]/[orderNumber]/action/sendbymail	The new endpoint v2/salesorder/[orderType]/[orderNumber]/action/sendbymail initiates the process of sending an order by email.	🔖	9.78.0
Improved performance for KitAssembly endpoint	The performance of the GET /api/v2/kitAssembly/ API endpoint has been improved by over 1000% by adding an index in the INTranSplit table. The following expand toggles have also been added: -expandStockComponents -expandNonStockComponents -expandKitAllocations	🔖	9.74.1
New compression option for the API	Earlier, only deflate and gzip compression was supported when fetching data from the API. Now Brotli compression has also been added. It can be used by adding the following Request Header: Accept-Encoding: br Brotli algorithm is better than gzip and deflate and will improve API performance when used.	🔖	8.82.0
Improved performance for GET inventory	The performance of the GET inventory endpoint has been improved, leading to quicker response time.	🔖	
Improved performance on GET Inventory endpoint [Pilot Testing]	The performance of the GET Inventory endpoint has been improved, and it is currently in Pilot Testing. This will be tested by the volunteered clients. Please contact the Partner Service from your country if you would like to volunteer. Once the pilot testing phase is completed, the improvement will be enabled for everyone. (Will be announced)	🔖	8.86.0
Get and edit notes in Supplier endpoint	You are now able to GET/POST/PUT notes in the Supplier endpoint. See the swagger documentation for more information.	🔖	F2020 05, Visma. Net ERP Kanba n week 24, Visma. Net ERP Week 24
New parameter for filtering and sorting of documents via SupplierInvoice endpoint	Document "Status" has been added as a filtering parameter via the SupplierInvoice endpoint to improve filtering and sorting of documents in Visma.net ERP.	🔖	8.85.0
Posting of attachments to JournalTransactionV2 for all modules	Now it's possible to use the new POST /api/v2/journaltransaction/module/{module}/{journalTransactionNumber}/attachment and /api/v2/journaltransaction/module/{module}/{journalTransactionNumber}/{lineNumber}/attachment to add attachments for transactions created for all workspaces. Earlier it was only possible to add attachments for transactions created in the general ledger (GL) workspace. The old endpoints are set to obsolete but will be available for 6 months. Note that it's still only possible to post journal transactions for the workspace GL but when journal transactions for other workspaces are created from other modules and endpoints and ends up in journal transactions, so that the journalTransactionNumber exist, then it's now possible to add the attachment.	🔖	8.74.0
Use internal employee ID to set Project manager on a project through API	Now, you can use the internal employee ID to set a project manager on a project through the Project endpoint.	🔖	F2020 05
Improved performance on GET SupplierInvoice endpoint	The performance of the GET SupplierInvoice endpoints has been improved. The new endpoint will be tested by a small number of clients in the beginning. Once the pilot testing phase is completed, the improvement will be enabled for everyone.	🔖	9.76.0
SupplierSubaccount now exposed in Supplier endpoint	You are now able to GET/POST/PUT the supplier ledger subaccount in the Supplier endpoint. The Supplier ledger sub field is available as supplierSubaccount. See the swagger documentation for more information.	🔖	9.81.0

Unspecified subaccount segments now replaced with default segment values when creating documents via CustomerInvoice endpoint	When you create documents with partially set subaccount segment values via the CustomerInvoice endpoint POST operation, the system will now replace the unspecified segments with default segment values. The default segment values are retrieved according to the setting 'Combine sales sub. from' in the Customer ledger preferences (AR101000) window.	🔖	9.80.0
Create purchase orders from a sales order via API	You can now create purchase orders from a sales order via the POST api/v2/salesorder/[SOOrderNo]/action/createPurchaseOrders endpoint. Note that if the body contains "preferSupplierFromSOLine=false", the default supplier for the item will be set as the supplier for the purchase order.	🔖	9.24.0
Improve performance on GET InventoryTransfer endpoint.	We have significantly improved the performance on the InventoryTransfer endpoint. Please give feedback on your experience.	〰️	9.50.0
PUT SupplierInvoice not updating both the account and subaccount fields in the Purchase invoices window when limitations were in place against existing subaccount	When settings from General ledger account access (GL104000) were set to limit access towards accounts and subaccount segment, the update via PUT operation could not process the request, when validation identified the input in fields momentarily being placed against user limited combination. This has now been fixed and both account and subaccount can be updated via PUT operation without the validation occurring between the fields being updated. The fix has been added under a feature toggle and will be initially activated only for specific companies. The feature toggle will later be activated to all companies.	〰️	
Release invoice endpoint not working properly	When using the "controller/api/v1/supplierInvoice/[invoicerefnbr]/action/release" API call, the system allowed you to release the same invoice several times creating multiple general ledger batches for the same document. Now the issue has been fixed and the release invoice action will be locked during the process and you will no longer be allowed to trigger the same action from different windows or tools multiple times.	〰️	8.52.0
Performance improvements on Dimension endpoints	The performance on the following Dimension endpoints has now been improved: GET/controller/api/v1/dimension/{dimensionId} GET/controller/api/v1/dimension/{dimensionId}/{segmentId} GET/controller/api/v1/dimension/{dimensionId}/{segmentId}/{valueId} GET/controller/api/v1/dimension/{dimensionId}/{segmentId}/publicid/{publicId}	〰️	8.86.0
POST SupplierInvoice "No access to branch" error when service API was used for the first time	When using Visma Service API token for the first with POST SupplierInvoice, the error "No access to branch" was returned and delay took place before a successful call could be made. This has now been fixed.	〰️	9.71.0
Maximum page size increased to 500 for all endpoints	The maximum page size has been increased to 500 for all endpoints on 10.07.2020	〰️	8.25 (200908)
Fixed error message POST /controller/api/v1 /PurchaseReceipt	Earlier, in some circumstances, the endpoint POST/controller/api/v1/Purchase returned an error message. This has now been fixed.	〰️	9.83.0
Performance improvements on GET Project endpoint	The performance on the GET Project endpoint has now been improved.	⚡	8.82.0
Read and create/update descriptions of multi-language supported fields via the API to support webshop and import of items	From this version on, there is translation support via API for the Description field in the Stock items and Non-stock items windows with POST, PUT, GET specific translation, GET all translations for a stock item, and DELETE. The system now also supports retrieving a list of all supported languages via API, with information if a language is active and the default.	⚡	8.26.0 (8.26.0 8.1036)
Project tasks statuses can be updated with the API endpoint PUT/Project/internal	When creating project tasks with the API endpoint PUT/Project/internal the project task status were always set to Active. This have now been fixed and status for the project task can be set to In planning, Active, Completed or Cancelled.	🔘	9.25.0
Performance improvement on high volume API calls.	We have done some performance improvement on API, which should lead to faster response times on high volumes API calls.	🔘	8.80.1
Extra validation and additional improvement to the PUT TimeCard endpoint	The PUT TimeCard endpoint now has an extra validation when neither Summary nor Materials have been added to the payload. The following error message "Update payload should contain at least a Summary or Materials." will be displayed.	🔘	9.76.0

SupplierPayment endpoint returns wrong data when payments and credit notes have the same reference number	Previously, both GET ALL and GET Specific - SupplierPayment endpoints returned the wrong data when payments and credit notes had the same reference number. This has now been fixed, but please note the following: 1.Get ALL SupplierPayment endpoint will return the correct header details and invoice lines applied against each payment document 2. The initial Get SPECIFIC SupplierPayment endpoint (controller/api/v1/SupplierPayment /paymentnumber), in order to be backward compatible, will return only one document, being the payment OR the credit note depending on the used filters. 3. A NEW endpoint Get SPECIFIC SupplierPayment endpoint has been deployed by type and number (controller/api/v1/SupplierPayment /paymenttype/paymentnumber). This one will return the correct information depending on the chosen document.	🔲	9.19.0
Error when changing project ID in Project management	Earlier, when changing the project ID in Visma.net Project Managment service, the integration sync with Visma.net ERP was stopping and an error was displayed. This has now been fixed.	🔲	8.91.0
ProjectTransaction Endpoint (PUT/POST) with several lines sets the last occurring financialPeriod on all lines	In previous versions, when using the Project transaction endpoint to create or update a project transaction with multiple transaction lines that have different financial periods, the project transaction was not taking into account the specified financial periods. This has now been fixed.	🔲	8.92.0
Not able to set termStartDate and termEndDate for prebooked invoice via API	Previously, you were not able to set termStartDate and termEndDate for pre-booked purchase invoices (P301000) via PUT - SupplierInvoice endpoint. This has now been fixed.	🔲	9.05.0
Inner exception and stack trace displayed when receiving error on GET Customer with attribute filter	Previously, when filtering on attributes on the GET Customer API endpoint, you could in some scenarios get an inner exception displayed in the response. This has now been fixed. In addition, the Swagger documentation for the GET Customer, GET Inventory and GET CustomerContract endpoints, related to filtering on attributes, has been improved.	🔲	9.08.0
Location endpoint now returns 400 instead of 500 error when request has incorrect data	Earlier, Location endpoints returned a 500 internal server error for requests containing an invalid postcode or an incorrect business account. This has now been corrected so that a 400 bad request error will be returned in these situations.	🔲	9.77.0
Create/update customer via Customer endpoint with account and subaccount restrictions fixed	Earlier, you could not create or update a customer via the Customer endpoint with account and subaccount restrictions. This has now been fixed for the following endpoints: - POST /api/v1/customer - PUT /api/v1/customer/{customerCd} - PUT /api/v1/customer/internal/{internalID} This will be released only for pilot customers at first.	🔲	9.84.0
Improved performance on Discount and Discount V2 endpoints for GET operation	The performance on Discount and Discount V2 endpoints for GET operation has been improved. This will be available for pilot customers first	🔲	9.86.0
GET SupplierPayment endpoint not displaying all fields in paymentLines	Missing fields "batchNumber", "description" and "currency" are now included in the paymentLines for the GET SupplierPayment endpoint.	🔲	9.30.0
Project and Project task fields not editable for prebooked purchase invoices via API	Previously, you we not able to edit project and project task fields for the prebooked purchase invoices via API - PUT method. This has now been fixed.	🔲	9.55.0
POST SupplierInvoice "No access to branch" error when service API was used	Earlier, when using Visma Service API token with POST SupplierInvoice, the error "No access to branch" was returned. This has now been fixed.	🔲	9.59.0
GET operation for "customerOverdueCharge" endpoint with parameter "expandApplications=true" returns all application details related to customer Overdue Charge	When using the GET operation for "customerOverdueCharge" endpoint with parameter "expandApplications=true", the system didn't give any details in the response message. This has now been fixed and third party integrators will get all application records related to the customer overdue charges in the response message under the application section. If the parameter is not set or is set as False, the response message will not contain any application details.	🔲	9.61.0
PUT ShipmentLine via API no longer incorrectly resets 'Note' value on line	Earlier, the PUT Shipment endpoint resetted the 'Note' value on a line, even if 'Note' was not in the shipmentline payload. This has now been fixed.	🔲	9.70.0

Inventory transfer endpoint returns 400 Bad request instead of 500 Internal server error	Previously, when the data in your request was wrong, the Inventory transfer endpoint returned 500 Internal server error, instead of 400 Bad request. This has now been fixed. You will now receive an improved error message explaining the error.	🔶	9.73.0
Purchase orders with the status Closed can no longer be added to purchase receipts	For endpoint POST /api/v1/PurchaseReceipt/[PurchaseReceiptNbr]/action/addpurchaseorder, you can no longer add purchase orders with the status Closed to purchase receipts.	🔶	9.26.0
Confirming shipment webhook sent when shipment status is updated	Earlier, when confirming shipments with a large amount of shipment lines, the webhook was sent before the shipment status was updated. This has now been fixed.	🔶	9.70.0
POST SupplierInvoice not allowing inserts when restriction groups are set active, if restrictions were limiting the default subaccount for new row entries	When the settings from General ledger account access (GL104000) were set to limit the access towards subaccount segments, the insert via POST operation could not process the request, when validation identified the default inputs into the row momentarily placed against user limited combination. This has now been fixed and the allowed subaccount combinations can be inserted with POST operation without default line entries for the subaccounts affecting the insert coming via API. The fix has been added under a feature toggle and will be initially activated only for specific companies.	🔶	9.53.0
Activate feature "Transfer Order" to the "Transfer Receipt" via Purchase Receipt endpoint	Earlier, adding "Transfer Order" to the "Transfer Receipt" via the Purchase Receipt endpoint was not possible. Now you are able to use POST operation via PurchaseReceipt endpoint to create transfer receipts via API.	🔶	8.86.0
Unable to set City and County in Main and Invoice address via POST Customer API	Earlier, you could not set the correct City and County in the Main and Invoice address via the POST Customer endpoint. This has now been fixed.	🔶	8.81.0
Improved performance on SupplierInvoice endpoint	To improve the performance on GET operations, some refactoring has been done in the SupplierInvoice endpoint.	🔶	8.80.0
CustomerPayments: Returns 500 results even when pageSize is set to 1000	Earlier, the maximum page size was hard coded to 500 and so the response for the GET customerPayment endpoint was able to return up to 500 payments. This has now been changed so that the maximum page size is configurable and the value is taken from the web.config file for every GET endpoint with the maxpageSize filter.	🔶	8.75.0
Account and subaccount combination in restriction groups not working via API SupplierInvoice endpoint (POST)	Earlier, creating a document via the API SupplierInvoice endpoint (POST) using an account and subaccount combination existing in a restriction group configured within Visma.net ERP was not possible. This has now been fixed.	🔶	8.89.0
Wrong sales account used in POST CustomerInvoice for export type customers	Earlier, the POST CustomerInvoice endpoint gave an incorrect sales account on invoice lines for customers registered for export to EU or non-EU countries. This has now been fixed.	🔶	8.74.0
CashSale endpoint getting slower for each paginated call	Earlier, the GET CashSale endpoint got slower and slower for each paginated call. This has now been fixed.	🔶	8.71.0
Saleorders endpoint getting slower for each paginated call	Earlier, the GET Salesorder endpoint got slower and slower for each paginated call. This has now been fixed.	🔶	8.71.0
Improved performance of GET journaltransaction	When using GET /api/v2/journaltransaction with a lot of data, the calls became slower for each paginated call and could in some cases end up in a timeout. This has now been improved.	🔶	8.74.0
GET CustomerInvoice endpoint using filter "dunningLevel" parameter returns an empty result	Earlier, the GET CustomerInvoice endpoint using some filters returned an empty result. This has now been fixed so that the endpoint returns an empty array instead of an empty result.	🔶	8.75.0
Branch filter is now correctly applied for Budget endpoint	When using GET for Budget, the mandatory Branch parameter was not used correctly for filtering. This has now been fixed.	🔶	8.75.0
No webhook notification when sales invoice status changed to "Closed"	Earlier, there was no webhook notification when the status of an invoice was changed to "Closed" in Visma.net ERP. This has now been fixed.	🔶	8.73.0
Not possible to specify PEPPOL information in Location endpoint in API	Earlier, there was no reference to PEPPOL scheme information in the Location endpoint for GET, PUT, POST operations. This has now been fixed.	🔶	8.78.0

GET Expense Claim "Pagesize and TotalCount" not returned	Earlier, the metadata "Pagesize and TotalCount" were not returned in GET ExpenseClaim. This has now been fixed.	🟥	9.71.0
Wrong documentation in the GET Supplier Invoice Endpoint for "Released" parameter	Earlier, the documentation for the "Released" parameter available in the GET Supplier Invoice endpoint was incorrect. The issue has now been fixed.	🟥	8.56.0
The POST SalesOrder endpoint returns an error when 'Free item' is selected on the order line	Earlier, when using the POST SalesOrder endpoint, it returned this error message when you had the check box 'Free item' selected on the order line: "An item with the same key has already been added". This has now been fixed.	🟥	8.48.0
SupplierInvoice endpoint returns 204 on failed update	There is a new improvement on the PUT SupplierInvoice endpoint. Earlier, when using this endpoint to update the invoice account, the system returned response "204 - NO Content", no error message, and failed update for users with restricted access to that particular account. This has now been fixed, but to be backward compatible and not break the existing integrations, the correct error message is displayed by the system if third party integrators will use the flag called ValidateLineDetails. The following remarks have been added to swagger for the new property: ValidateLineDetails: "It is recommended that the clients/integrators gradually adapt this setting. They should have a feature toggle of some sort on their side to enable/disable this. Once the functionality is matured, it can be set to default without any further worries"	🟥	8.54.0
Posting "CustomerInvoice/V2" and changing the date via the UI resets Unit price on lines	Earlier, when using "POST V2/CustomerInvoice" and changing the invoice date via the UI, the Unit price was reset on the invoice lines. This has now been fixed.	🟥	8.56.0
Restructure, introduce pagination and improve the performance for GET stocktake endpoints	The response DTO (Data Transfer Object) has been restructured, pagination is introduced, and the performance for GET stocktake endpoints has been improved. To avoid breaking the current integrations, all changes have been put under V2. Also, the PUT stocktake endpoint has been duplicated under V2, and all existing stocktake endpoints have been marked as obsolete. Both V1 and V2 will be supported for the next 6 months.	🟥	8.40.0
Posting the SalesOrder type RC returns an error	After the 8.32 releases, an error was returned when posting the SalesOrder type RC. This has now been fixed.	🟥	8.33.0
fix toggleBalanceSigns parameter functionality	In previous versions, an error that caused balances with wrong sign for the Beginning balances in the GeneralLedgerBalanceV2 has been fixed.	🟥	8.33.0
Slow performance on pagination when using the GET Customer endpoint	There was an issue when using pagination in the GET Customer endpoint. The higher page number used when retrieving a collection of customers, the slower the performance was. This has now been improved.	🟥	8.36.0
Not possible for any sales order to create two shipments from two different warehouses	Earlier, for any sales order, it was not possible to create two shipments to be sent from two different warehouses. This has now been fixed.	🟥	9.03.0
Fixed 'toggleBalanceSigns' parameter on GeneralLedgerBalancev2	In earlier versions of the GeneralLedgerBalance v2 endpoint, the toggleBalanceSigns parameter was toggling the balance signs for accounts of type expense and liability. The new version toggles the balance signs for accounts of type income and liability and thus the balances in the response will show the debit and credit balances as posted in accounting.	🟥	8.34.0
GET warehouse endpoint returning trailing spaces in several IDs	Earlier, the GET warehouse endpoint returned receiptLocationId, shipLocationId, returnLocationId, locations-locationId, and dropShipLocationId with trailing spaces. This has now been fixed, and IDs will not contain trailing spaces in the response any more.	🟥	8.56.0
Wrong response code when confirming shipment	Earlier, when you confirmed a shipment from the API, in some scenarios you got the response code "200 OK", even though the confirm shipment operation was not successful. This has now been fixed.	🟥	8.39.0
GET Customer no longer returns metadata (MaxPageSize, TotalCount)	After the 8.36 release, GET Customer did not return the metadata (MaxPageSize,TotalCount) array in the response. This has now been fixed.	🟥	8.37.0
KitSpecification endpoint missing LastModifiedDateTime in the DTO and cannot be filtered upon	Earlier, GET KitSpecification endpoint was missing the field LastModifiedDateTime in the DTO and could not be filtered upon. This has now been fixed.	🟥	8.56.0

Wrong account in credit note lines when created with API function Reverse and Apply to note	Earlier, a wrong account was generated in the lines of credit notes when they were created using api/v1/customerinvoice/{invoiceNumber}/action/reverseandapplytonote endpoint. This has now been fixed.	🟧	8.56.0
Breaking changes on Budget endpoint	From January 18th 2022, the following breaking changes will be committed on GET method of the Budget endpoint: - The Branch and Ledger filters will become mandatory. Now they are specified to be mandatory by documentation, but it is not enforced by implementation. - The FinancialYear filter will become mandatory - Now, the branch filter requires being specified either by branch full name (example: BranchID - BranchName), or by branch ID surrounded by quotation marks. It will be simplified to require the branch ID without any other marks.	🟧	8.80.0
Better error message creating a sales order with an existing order number via API	There is now a more explanatory error message when trying to create a sales order with an already existing order number via the API.	🟧	8.65.0
Ungraceful error message thrown when client attempts to POST Customer Invoice V2	Earlier when you did a post to api/v2/customerinvoice containing origInvoiceDate with Use Value Date not active in the Accounts Receivable Preferences (AR101000) you did not get a clear error message. This has now been fixed, and you will get a clear error message in the response explaining why it failed. The error message will not contain the invoice number, since the invoice is not yet created when the error occurs.	🟧	8.58.0
API POST calls returned incorrect location for credit note, credit adjustment or prepayment	When sending POST > credit note, credit adjustment, or prepayment via API, the system returned an incorrect location after booking the invoice in the ERP. For example: Instead of returning: controller/api/v1/supplierInvoice/Prepayment/{ref. number} the System returned: controller/api/v1/supplierInvoice/{ref. number} By not adding the document type in the URL, you would not have been able to find your document just created, because your location would have returned a "404 not found" error. This issue has now been fixed and the system returns the correct location.	🟧	8.46.0
Missing subaccount description API post subaccount	In earlier versions, when a default language was set in the System locals (SM200550) window under 'Set up languages', there was an error in using the API endpoint Post subaccounts. The subaccount description text was omitted and not visible in the Description field in the Subaccounts (GL203000) window. This has now been fixed.	🟧	8.44.0
Unhandled exception in the CustomerInvoice V2 endpoint	Earlier, an unhandled exception was thrown by the CustomerInvoice V2 endpoint, when the fields "startDate" and "endDate" were included in the POST payload. This has now been fixed.	🟧	8.41.0
Line note removed from purchase orders when purchase orders updated via API (PUT)	Earlier, when updating purchase orders via API, using PUT method and PurchaseOrder endpoint, the notes were automatically removed. This has now been fixed.	🟧	8.87.0
Wrong "Location" URL returned after successful POST CustomerInvoice V2 request	Earlier, the wrong "Location" URL was returned after a successful POST CustomerInvoice V2 request. This has now been fixed.	🟧	8.86.0
PUT inventory endpoint does not update item values for items of type "SubAssembly" or "Component Part"	Earlier, the PUT inventory endpoint did not update item values for items of type "SubAssembly" or "Component Part". This has now been fixed.	🟧	8.87.0
401 Unauthorized error message on $Batch endpoint	For a while, batch http requests to api/v1/$batch have failed with 401-Unauthorized. The workaround has been to set authentication and authorization headers on every sub request. This has now been fixed so that all headers from main request will be copied to every sub request if they are not already present.	🟧	8.85.0
GET CustomerInvoice endpoint returns the same value for fields 'originatorDocRef' and 'contractorDocRef'.	Earlier, when using the GET customerinvoice endpoint, the fields originatorDocRef and contractorDocRef got the same value. This has now been fixed.	🟧	8.84.0

Pagination and filtering issues introduced with performance improvement of GET salesorderbasic endpoint in 8.59	In 8.59 we introduced a performance optimization for GET salesorderbasic endpoint which resulted in some issues with pagination and filtering. This has now been fixed, and we have reactivated the optimization again.	🔲	8.60.0
Error on purchase receipt from API with allocation and same stock item twice	Earlier, when creating a purchase receipt from API with the same stock item twice and with allocation, you got an error message. This has now been fixed.	🔲	8.71.0
Project and project task in output with GET for PO receipt	Project and project task will now be in the output if you do GET for PO receipt.	🔲	8.72.0
"CustomerVATZone" overriden when "soShippingAddress" was included in POST for SalesOrder endpoint	Earlier, the "CustomerVATZone" was overridden for the SalesOrder endpoint for versions V1 and V2 when "soShippingAddress" was included in the JSON string for POST. This has now been fixed.	🔲	8.80.0
Possible to insert invalid value in "type" when using PUT Inventory endpoint and make the item invalid	Earlier, it was possible to insert an invalid value in "type" when using the PUT Inventory endpoint. This has now been fixed.	🔲	8.89.0
POST operation for JournalTransactionV2 for non-existing and inactive branches corrected	When using the POST operation for JournalTransactionV2 including a non-existing or inactive branch, it was posted to another branch. This has now been fixed and the request is rejected in these cases.	🔲	8.71.0
DiscountAmount omitted when posting to V2/CustomerInvoice after version 8.56	Earlier, the option Manual discount on sales invoice lines (AR301000) was not set correctly when posting to the V2/CustomerInvoice endpoint. This has now been fixed.	🔲	8.63.0
Project validation when using cashTansaction endpoint for creating cash transactions with projects and accounts not included in account groups	In previous versions, you were able to create cash transactions with projects on accounts that are not included in account groups using the CashTransaction endpoint. This issue has been fixed by adding validation on project, which checks if the account is included in an account group or not.	🔲	8.59.0
POST PurchaseOrderReceiptBasic endpoint fails in some circumstances	Earlier, the POST PurchaseOrderReceiptBasic endpoint was failing in some circumstances. This has now been fixed.	🔲	9.20.0
Attachments[] not returned in GET Inventory endpoint response when using Attributes filter	Earlier, attachments[] were not included in response when the GET Inventory endpoint was used in combination with the Attributes filter. This has now been fixed.	🔲	8.66.0
GET inventoryReceipt endpoint not returning transferNumber field	Earlier, the GET inventoryReceipt endpoint did not return the transferNumber field. This has now been fixed.	🔲	8.67.0
Unable to GET "Note" fields via GET Purchase Order endpoint	Earlier, in some circumstances, the GET Purchase Order endpoint did not return the "Note" fields. This has now been fixed.	🔲	8.87.0
Error when creating purchase receipt from API when Default Receipt To location not allowing receipts	Earlier, POST PurchaseReceipt with Default Receipt TO location gave an error message if the stock item had Default receipt to set to a location that does not allow receipts. This has now been fixed.	🔲	8.95.0
Fixed GET Customer endpoint when filtering on attributes	After the 9.57 release, the GET Customer endpoint was not working properly when filtering on attributes. This has now been fixed.	🔲	9.60.0
SupplierInvoice Endpoint error - "Do you want the system to recalculate the amount(s) in the cost column"	If the Supplier (AP303000), which was targeted, used the Gross or Net tax calculation modes, the call launched an error on recalculation on the line. This was caused by the recent implementation enabling to link purchase receipt lines multiple times into purchase invoice documents, which did not allow the line recalculation to be executed. This has now been fixed.	🔲	9.64.0

POST/salesOrder/action /createPurchaseOrder no longer returns 'tstamp cannot be empty'	Earlier, in some circumstances, POST/salesOrder/action/createPurchaseOrder returned the error message 'tstamp cannot be empty'. This has now been fixed.	🟧	9.71.0
Error on subaccount when creating customer with invoicePOST CustomerInvoice V2 with restriction group setup	When having access restriction on accounts and subaccounts, but you didn't use those accounts and subaccounts when sending an API POST operation for CustomerInvoice endpoint, the system showed an error that subaccounts do not exist. This has now been fixed and the sales invoices sent using API POST operation for CustomerInvoice endpoint are created in the system with the correct accounts and subaccounts. This will be first enabled for PILOT customers.	🟧	9.64.0
PUT SupplierInvoice not allowing multiple SplitLines to be used (Affected specific companies - Feature used for API when restriction groups restricting default subaccount)	When settings from General ledger account access (GL104000) were set to limit access towards accounts and subaccount segment, the update via PUT operation using SplitLines could not process the request. Restricted subaccount could not be processed when SplitLine was actioned more than once. This has now been fixed. The fix has been added under a feature toggle and activated only for specific companies.	🟧	9.66.0
'Branch is inactive' error for active branch when using POST SalesOrder	Earlier, for POST SalesOrder, it was not possible to create a sales order on sub branches when the main branch was inactive. This has now been fixed.	🟧	9.72.0
GET v2/salesorder endpoint with use of pagination	The GET v2/salesorder endpoint with the use of pagination no longer returns the error "Divide by zero error encountered".	🟧	9.68.0
GET ProjectTransaction returnslastModifiedDateTime	The GET API call now returns the lastModifiedDateTime for project transactions for the ProjectTransaction endpoint.	🟧	F2020 05
API: Posting a customer with the same customer ID that a previously deleted customer had, returns an error	Earlier, when a customer was created through API with a specific customer ID and then was deleted from the UI, an error occurred when you tried to recreate the same customer with the same customer ID. This has now been fixed.	🟧	8.25 (20090 8)
Order By filter in Ledger endpoint removed	The Order By filter in the Ledger endpoint was not functional and now it has been removed.	🟧	F2020 05
Order By filter in PaymentMethod endpoint removed	The Order By filter in the PaymentMethod endpoint was not functional and now it has been removed.	🟧	F2020 05
Order By filter in JournalTransaction endpoint removed	The Order By filter in the JournalTransaction endpoint was not functional and now it has been removed.	🟧	F2020 05
Order By filter in Account endpoint removed	The Order By filter in the Account endpoint was not functional and now it has been removed.	🟧	F2020 05
The customer number field returns trailing spaces when using the "CustomerInvoice" endpoint	Earlier, on the CustomerInvoice endpoint, the object for customer did not remove spaces before and after the customer number. This has now been fixed.	🟧	8.25 (20090 8)
Corrections in API documentation	In the API documentation, it was wrongfully documented that filtering on account was mandatory. This has now been corrected. Also, if you specified an invalid account, all the transactions were returned. This has also been fixed so that no records are returned.	🟧	F2020 05
The ARInvoice query suffers from async network I/O	Improved performance for GET CustomerInvoice, CustomerCreditNote and CustomerDebetNote endpoints by a using a smarter and more performance optimized SQL query.	🟧	8.29.0
GET SupplierInvoice: New fields added related to deferralSchedule	The fields deferralSchedule and deferralScheduleNbr have been included in the GET SupplierInvoice endpoint. Earlier, only the deferralCode was retrieved. The "ScheduleID" from database displayed in deferralSchedule The "Schedule Number" from UI displayed in deferralScheduleNbr	🟧	9.27.0
POST PurchaseReceipt/ {purchasereceiptNbr}/action /release endpoint always returns "Inprocess" status	Earlier, the POST PurchaseReceipt/{purchasereceiptNbr}/action/release endpoint always returned the "Inprocess" status, even if the "Release" action failed. This has now been fixed.	🟧	9.69.0

Trailing spaces on item IDs in shipment allocation	In version 8.20, trailing spaces on item IDs in allocation and trailing spaces in inventory numbers in the ShipmentDetailLines were not working correctly in the Shipment endpoint. This has now been fixed.	🟥	F2020 05, Visma. Net ERP Kanban week 24, Visma. Net ERP Week 24
Duplicates from paging over "GeneralLedgerTransactions" using "lastModifiedDate" parameter	When using the LastModifiedDateTime filter in the GeneralLedgerTransactions endpoint, entries are now sorted by: BatchNbr, Module, LineNbr and LastModifiedDateTime. For all other cases the ordering is done by: TranDate, RefNbr, BatchNbr, Module, LineNbr. This new sorting regime will avoid duplicates from paging and differently sorted results for repeated queries with the same filter settings.	🟥	F2020 05
Return response status 400 instead of 500 when invalid parameter is given in the GET KitSpecification endpoint	Earlier, we returned response code 500 when invalid parameter was given for the GET KitSpecification endpoint. This has now been corrected, and we now return response code 400 instead. We have also added support for GET all.	🟥	8.25 (200908)
Return response code 400 instead of 500 when invalid parameter is given for POST KitSpecification endpoint	Earlier, we returned response code 500 when wrong parameter was used for the POST KitSpecification API endpoint. This has now been corrected, and we now return response code 400 instead.	🟥	8.25 (200908)
Return response code 400 instead of 500 when invalid parameter is given for the PUT KitSpecification endpoint	Earlier, we returned response code 500 when invalid parameter was given for the PUT KitSpecification endpoint. This has now been corrected, and we now return response code 400 instead.	🟥	8.25 (200908)
SalesPerson endpoint not returning "lastmodifiedDateTime" and "createdDateTime"	Earlier, the GET SalesPerson endpoint did not return "lastmodifiedDateTime" and "createdDateTime" and thus it was not possible to filter on these parameters . This has now been fixed.	🟥	8.64.0
Posting CustomerInvoice with CashAccount not belonging to the main branch causes issues	Posting CustomerInvoice with CashAccount not belonging to the main branch caused issues after the 8.25 release. This has now been fixed.	🟥	8.26.0 (8.26.0 8.1036)
Null bearer-token authentication requests resulting in unauthorised API requests	In previous versions, during consolidation process the API calls made to fetch data from child companies sent bearer-token authentication requests to the consolidation endpoints. These tokens sometimes were null and resulted in unauthorised API requests. The bearer-tokens being added to the API request-headers as authentication are optional at the consolidation endpoints and they have been removed from the 8.26 version.	🟥	8.26.0 (8.26.0 8.1036)
GET "inventory" returns "warehouseID" with trailing spaces	In some scenarios GET "inventory" endpoint returned trailing spaces for warehouse id under warehouseDetails, which led to DTO property could not be used directly in other API endpoints. This has now been resolved.	🟥	8.57.0
The GET warehouse endpoint returns warehouseID with trailing spaces	Earlier, the GET warehouse endpoint returned warehouseID with trailing spaces. This has now been fixed, and the warehouseID will not contain any trailing spaces any more in the response.	🟥	8.41.0
The reopenSalesOrder action is not working as expected via API	Earlier, the reopenSalesOrder action did not work as expected via API. This has now been corrected, so that it works the same way as in the UI.	🟥	8.26.0 (8.26.0 8.1036)

Allow purchaseReceipt action addPurchaseOrder to add purchase orders of type drop-ship	Earlier, you were not able to add drop-shipments to Poreceipt through POST/controller/api/v1 /PurchaseReceipt/{receiptNumber}/action/addpurchaseorder. This has now been fixed by adding orderType to the JSON-file:
	
	{
	  "purchaseOrders": [
	    {
	      "orderNbr": "string",
	      "orderType": "RegularOrder"
	    }
	  ]
	}
	
	OrderType needed to be changed to DropShip to get drop-shipments to work.
		🟧	8.89.0

Failing Swagger 3.0 rules in O2C API endpoints	In Visma.net ERP, a swagger json document is currently exposed for our APIs that previously failed to Open API/Swagger 3.x rules. Earlier, one of the rules that failed was about Routes (path templates). Routes are supposed to be equal, but they were not due to the path variables being used. The resulting swagger json document ended up with having two distinct entries for the two path variables, instead of one. This has now been fixed and corrected all route attributes that had this problem have been corrected.	🟧	Not Planned
Failing Swagger 3.0 rules in O2C API endpoints	In Visma.net ERP, a swagger json document is currently exposed for our APIs that previously failed to Open API/Swagger 3.x rules. Earlier, one of the rules that failed was about Routes (path templates). Routes are supposed to be equal, but they were not due to the path variables being used. The resulting swagger json document ended up with having two distinct entries for the two path variables, instead of one. This has now been fixed and corrected all route attributes that had this problem have been corrected.	🟧	Future Versions
The Inventory endpoint POST allows creating stock items with underscore	Earlier, it was allowed to create stock items with the underscore character (_) when using the Inventory endpoint POST. This is not allowed anymore and the validation is now the same as in the UI of Visma.net ERP.	🟧	8.27.0
Create Projects with shorter length than the defined segment length of the Project key with Project endpoint POST operation.	In the earlier version of the Project endpoint, it wasn't possible to create a project with a number of segment digits fewer than the defined length of the Project Segment Key. This has now been fixed.	🟧	8.36.0
Unable to update some of the fields in the Sales invoices (AR301000) window via API	Earlier, some of the fields in the Sales invoices (AR301000) window could not be updated through the API, after the invoice was released. This has now been fixed, so that the fields "documentDueDate", "cashDiscountDate", "paymentMethod" and "cashAccount" are updated when using the PUT method for the customerInvoice API.	🟧	8.30.0
API calls towards newly provisioned companies not updating user context	Earlier, if you provisioned a new company and did API calls towards the newly provisioned company, you could end up on a node where the user context was not updated. This would typically give you a 500 internal server error and if you retried, it worked. The cache handling of user context has been improved so you should not end up in this scenario anymore.	🟧	8.26.0 (8.26.0 8.1036)
Filtering on sales subaccount improved	In the previous version, filtering on sales subaccount was not working . This has now been fixed.	🟧	8.24 (20062 3)
Display metadata in Salesperson endpoint	Metadata was not displayed in the Salesperson endpoint. This has now been fixed. In addition, base pagination is obsolete and will be removed in August 2020.	🟧	8.24 (20062 3)
O2C endpoints return wrong error as response status code	In version 8.20, the O2C endpoints returned error 500 while it should have returned error 400 as the response status code. This has now been fixed.	🟧	F2020 05
Wrong window ID in Swagger documentation for SalesCategory	Earlier, the Swagger documentation for the endpoint GET SalesCategory was referring to window ID SO301000 (Sales order). This was wrong. This has now been corrected and the documentation is now referring to the correct window ID, which is IN204060 (Item sales categories).	🟧	F2020 05
Pagination forced in SupplierInvoice endpoint	Pagination is now forced in the SupplierInvoice endpoint: * If no pagination is specified, only 100 records will be returned * If pagination is used but the maximum page size is more than 100, then only 100 records will be returned * The maxPagesize info has been added as metadata in response	🟧	8.22 (20052 6 Releas e)

Response status returning 400 with a longer location ID than allowed	The response status is now returning 400 when trying to POST or PUT a location with a location ID longer than the allowed setting in segmented keys.	🟧	8.24 (20062 3)
Invoices from Visma.net Project management get the wrong cash account	Earlier, when branch information was used in an invoice, the payment method and the cash account used for the invoice were not set correctly according to how the payment method and the cash account were linked to the branch. This has now been fixed.	🟧	8.26.0 (8.26.0 8.1036)
General ledger balance v2 was giving HTTP 400 on valid requests	There was an issue on version 2 of the GeneralLedgerBalance endpoint: reading of account external codes was done wrongfully. Because of it, the response of the API was error code 400 - BadRequest. The issue related to reading the external codes is fixed now.	🟧	8.24 (20062 3)
Fixed LastmodifiedDate filter in BasicProject endpoint	The LastmodifiedDate filter in the BasicProject endpoint was not working in previous versions. This has now been fixed.	🟧	8.23 (20060 9)
Error handling for purchase invoices improved	Error handling when using OverrideNumberSerie=true together with the manual numbering option has been improved.	🟧	8.25 (20090 8)
Pagination on GET Customer endpoint when filtering on attributes	Earlier, pagination did not work on the GET Customer endpoint when filtering on attributes. This has now been fixed.	🟧	8.61.0
Configuring of manual purchase invoice numbering series with API	The configuration of manual numbering for the Purchase invoice numbering series did not sync with API due to a cache issue. In fact, this issue affected all numbering sequences. This has been fixed in the 8.26 release.	🟧	8.26.0 (8.26.0 8.1036)
PUT "kitassembly" generates: Object reference not set to an instance of an object	Earlier, when you performed a PUT operation to the "kitassembly" endpoint, an error message was thrown: "Object reference not set to an instance of an object. " This has now been fixed.	🟧	8.28.0
Unable to update fields in a released debit note via API	Earlier, there were some fields in the debit note that could not be updated via API (PUT api/v1 /customerDebitNote/{debitNoteNumber}), after the debit note was released. This has now been fixed.	🟧	8.30.0
Unable to update a purchase receipt's supplier ID via API	Earlier, it was not possible to update "supplierId" in the PUT PurchaseReceipt endpoint. This has now been fixed.	🟧	9.19.0
Get all projects in the Project endpoint	In the previous version, when using the Project endpoint, it was not possible to get all projects and the response message showed error. This has now been fixed.	🟧	8.29.3
Inventory endpoint allows space in the "inventoryNumber" field	Earlier, it was allowed to use spaces inside the "inventoryNumber" field of the Inventory endpoint. This caused invalid data in the system. This has now been fixed, so that you will get an error message if spaces are being used: "400 - Bad request, Error creating inventory. New inventory must have a number that can not contain spaces."	🟧	8.28.0
Customer endpoint allows space in the "number" field	Earlier, it was allowed to use leading and trailing spaces in the "number" field of the Customer endpoint. This caused invalid data in the system. This has now been fixed, so that you will get an error message if spaces are being used: "400 Bad request - Error inserting the customer. Input data not valid. New customer must have a number that can not contain spaces."	🟧	8.28.0
The Inventory endpoint allows leading and trailing spaces in the InventoryNumber field via API POST	Earlier, the Inventory endpoint allowed both leading and trailing spaces in the InventoryNumber field via API POST. This has now been fixed so that leading and trailing spaces are removed from the InventoryNumber field and they will not lead to invalid data anymore.	🟧	8.27.0
The Customer endpoint POST allows creating records with the underscore character (_)	Earlier, the Customer endpoint POST allowed creating records with the underscore character (_) in the "number" field. This is now fixed, so that you will get a response back that you have used an invalid character.	🟧	8.27.0
Underscore "_" character not allowed in Supplier endpoint records	The Supplier endpoint has been updated so that it is no longer possible to create a supplier with a supplier number that contains the underscore "_" character.	🟧	8.27.0
The Customer endpoint allows leading and trailing spaces in the Number field via API POST	Earlier, the Customer endpoint allowed both leading and trailing spaces in the "number" field via API POST. This is now fixed, so that leading and trailing spaces are removed from the "number" field and will not cause invalid data anymore.	🟧	8.27.0

Supplier numbers with leading or trailing spaces not allowed in Supplier endpoint	The Supplier endpoint has been updated so that it is no longer possible to create a supplier with a supplier number that has leading or trailing spaces.	◻	8.27.0
$Batch Endpoint returns 401 - Unauthorized for all requests except first operation in the batch payload	Earlier, the $Batch Endpoint was returning 401-Unauthorized for all requests except first operation in the batch payload. This has now been fixed.	◻	8.29.0
POST / PUT Customer operation allows assigning multiple default direct debit lines	Earlier, POST and PUT on the Customer endpoint allowed assigning multiple default direct debit lines via API. This has now been fixed.	◻	8.69.0
The GET CustomerPayment endpoint returns incorrect document type	Earlier, the GET CustomerPayment endpoint returned incorrect document type in some situations. This has now been fixed.	◻	8.40.0
Get discountCode endpoint representing wrong DTO format	Earlier, the GET DiscountCode endpoint represented a wrong DTO format. This has now been fixed in version V2 of the endpoint.	◻	8.72.0
GET discount endpoint representing wrong DTO format	Earlier, the GET discount endpoint represented a wrong DTO format. This has now been fixed in version V2 of the endpoint.	◻	8.72.0
Wrong report format returned by the PrintShipmentConfirmation endpoint	Earlier, a wrong report format was returned by the PrintShipmentConfirmation endpoint via API. This has now been fixed.	◻	8.27.0
Errors in the response returned from the ProjectTransaction endpoint	In previous versions, the ProjectTransaction endpoint was not showing in the response message the CreditAccountGroup for the GET operation. Now this issue has been fixed.	◻	8.31.0
VAT for FreightCost (Shipvia) is not calculated when posting a sales order via API	Earlier, the VAT for FreightCost (Shipvia) was not calculated when posting a sales order via API. This has now been fixed, so that freightCost (Shipvia) VAT is calculated when sending POST request via V1 /V2 sales order endpoints.	◻	8.28.0
Sales order total gets the wrong total amount when using percentage discount	Earlier, the Sales order total got the wrong total amount when using percentage discount via API. This has now been fixed.	◻	8.26.0 (8.26.0 8.1036)
The API value dontPrint does not work on CustomerInvoice endpoint	Earlier, the API value dontPrint was not supported on the CustomerInvoice endpoint. This has now been fixed.	◻	8.33.0
The CustomerInvoice endpoint allows leading spaces in the "referenceNumber" field via API POST	Earlier, leading spaces were allowed in the CustomerInvoice endpoint for the field "referenceNumber" when performing a POST operation. This has now been fixed, so that CustomerInvoice, CustomerDebitNote and CustomerCreditNote endpoints will skip leading and trailing spaces in the "referenceNumber" field for the POST method. When "referenceNumber" contains spaces the response will be: "400 - Bad request, Error creating document. New document must have a number that can not contain spaces".	◻	8.29.0
GET operation for Currency Endpoint (texchangerates /toCurrencyId/effectiveDate) does not return all the data shown in the swagger documentation	In previous versions, the GET /api/v1/currency/exchangerates/{toCurrencyId}/{effectiveDate} endpoint did not return all data listed in the Swagger documentation. This has now been fixed.	◻	8.29.0
Use CashTransaction endpoint with a transaction date in a closed period	In the previous version, it was not possible to use the CashTransaction endpoint with a transaction date in a closed period, even when the finanacial period was in an open period. This issue has now been fixed.	◻	8.25 (20090 8)
Inventory endpoint POST allows creating items with length higher than segment key	The Inventory endpoint's POST operation allowed creating items with length higher than the UI segment key. Now, this has been fixed. If you send through API a length higher than set on the segment key, an error will be returned.	◻	8.25 (20090 8)

Update FreightAmount automatically based on FreightCost in Shipment endpoint	Earlier, FreightAmount was not updated automatically based on FreightCost using PUT in the Shipment endpoint. This has now been fixed.	🔴	8.22 (200526 Release), Visma. Net ERP Kanban week 24, Visma. Net ERP Week 24
GET SalesPerson endpoint giving wrong DTO format for pagenumber and pagesize	Earlier, the GET SalesPerson endpoint gave a wrong DTO format for pagenumber and pagesize in response. This has now been fixed.	🔴	8.71.0
Feature toggle for allocations showing an extra row (/erp/api/v1/purchasereceipt endpoint)	The issue with allocations that show an extra row has been fixed under a feature toggle. This occurs when a purchase receipt is created with POST Purchase receipt. The fix is only for the /erp/api/v1/purchasereceipt endpoint	🔴	8.98.0
Cost price and description of purchase receipts linked to purchase order	Earlier, when you created a purchase receipt and linked it to a purchase order with API, the cost price and description were retrieved from the item and not from the purchase order rows as they should. This has now been fixed and the cost price and description are retrieved from the purchase order rows for each item. Fix is deployed under a feature toggle.	🔴	8.86.0
Failing Swagger 3.0 rules in O2C API endpoints	In Visma.net ERP, a swagger json document is currenctly exposed for our APIs that previously failed to Open API/Swagger 3.x rules. Earlier, one of the rules that failed was about Routes (path templates). Routes are supposed to be equal, but they were not due to the path variables being used. The resulting swagger json document ended up with having two distinct entries for the two path variables, instead of one. This has now been fixed and corrected all route attributes that had this problem have been corrected.	🔴	8.29.0
Wrong status when updating the sales order where the customer has exceeded its credit limit	Earlier, when a customer had exceeded its credit limit and when you updated a sales order using PUT /api/v1/salesorder/{salesorderNumber} from status "Hold", the status didn't change to "Credit hold". Instead it changed to "Open". This has now been fixed so it works exactly as in the user interface.	🔴	8.43.0
Purchase invoices with a leading space in the reference number	Previously, it was possible to create purchase invoices with a leading space in the reference number using manual numbering, and that caused data corruption. This has now been fixed.	🔴	8.30.0
Pagination not working with Account endpoint	The error in the Account endpoint documentation has been fixed. Now, pagination is not implemented on this endpoint and the numberToRead and skipRecords are deprecated fields.	🔴	8.25 (200908)
Purchase Receipt not inheriting currency from the supplier via POST API	The Purchase Receipt POST operation did not inherit the currency from the supplier if the currency override setting was disabled. This has now been fixed.	🔴	8.26.0 (8.26.0 8.1036)
SalesOrder endpoint returned 500 Internal Server Error instead of 400 Bad Request	The POST SalesOrder endpoint now returns the correct 400 Bad Request error instead of the incorrect 500 Internal Server Error when you try to create a sales order with a previously used sales order number.	🔴	9.20.0
Wrong response status 500 when creating shipment via POST endpoint /controller/api/v2/salesorder/{saleOrderNumber}/action/createShipment	When you try to create a shipment for a specific sales order with not all lines available in stock and option "Ship only when complete", you will no longer get the incorrect error response status 500, but a 409 (Conflict) with descriptive message instead.	🔴	9.20.0
API Inventory - CostPriceStatistics note returned for some stock items when getting list	CostPriceStatistic is now correctly populated for all items when using the GET list Inventory API endpoint.	🔴	9.18.0

Not possible to add a new line via PUT Stocktake V2	Earlier and in some circumstances, it was not possible to add a new line via the PUT Stocktake V2 endpoint. This has now been fixed.	🔲	9.13.0
Invoice balance reset after Approved for payment field is updated via PUT SupplierInvoice endpoint	Earlier, when the paySelected field was updated via PUT SupplierInvoice endpoint for an invoice partially paid, the open balance was reset to the initial balance available to pay. The issue has been fixed and the solution has been deployed under a feature toggle.	🔲	9.09.0
Account and subaccount combination in restriction groups not working via API Customer creditNote V2 endpoint (POST)	Earlier, it was not possible to create a document via the API Customer Credit note V2 endpoint (POST), when using an account and subaccount combination existing in a restriction group configured within Visma. net ERP. This has now been fixed.	🔲	8.92.0
Unable to update "componentID" via PUT KitSpecifications endpoint	Earlier, it was not possible to update "componentID" in an existing line of a kit specification via the PUT KitSpecifications endpoint. This has now been fixed.	🔲	9.12.0
Filtering on attributes not working via GET Supplier endpoint	Filtering on attributes via the GET Supplier endpoint had stopped working after the latest improvement implemented to improve the performance. This has now been fixed.	🔲	8.95.0
Branch filtering for JournalTransaction endpoint to be applied on transaction instead of batch	At this moment, the Branch filter on the JournalTransaction endpoint is applied on batch level. It will be switched to be applied on transaction level instead of batch. This change will be enforced starting the 30th of August 2022. The ones willing to switch to this new approach earlier can contact the partners, support, or development team. The same applies for the ones wanting to keep the old approach after the 30th of August 2022.	🔲	8.98.0
Release of purchase invoice via API missing link to batch, invoice stuck in Balanced status	This specific problem occurred in some occasions during heavy API load together with parallel actions, where the released purchase invoice may have incorrectly remained in the Balanced status after it was released via SupplierInvoice endpoint. In this scenario the full release operation was not able to finish. Meaning even though the release process was successful and a batch was created, if the batch failed to link the documents (the Financial details tab not showing a link to the batch no.), due to this the purchase invoice document remained in the Balanced status. This has now been fixed.	🔲	9.40.0
GET customerPayment endpoint (All & Specific) does not retrieve the Balance write-off value	Earlier, the GET customerPayment endpoint (All & Specific) did not retrieve the Balance write-off value. This has now been fixed.	🔲	9.02.0
Account and subaccount combination in restriction groups not working via API Customer Invoice V2 endpoint (POST)	Earlier, it was not possible to create a document via the API Customer Invoice V2 endpoint (POST), when using an account and subaccount combination existing in a restriction group configured within Visma.net ERP. This has now been fixed.	🔲	8.92.0
POST V2/salesorder/ {salesOrderNbr}/action /createShipment always results in a customer ledger document of the Credit note type	Earlier, for shipments created via the POST V2/salesorder/{salesOrderNbr}/action/createShipment endpoint, the Prepare invoice action always created invoices of the type Credit note. This has now been fixed.	🔲	9.08.0
Data not sorted correctly in GET Inventory request with Pagination and availabilityLastModifiedDateTime	Earlier, response data were not sorted correctly in a GET Inventory request with Pagination and a availabilityLastModifiedDateTime filtering. This has now been fixed.	🔲	9.12.0
Data not sorted correctly in GET Inventory request with Pagination and LastModifiedDateTime	Earlier, response data were not sorted correctly in a GET Inventory request with Pagination and a LastModifiedDateTime filtering. This has now been fixed.	🔲	9.12.0
Sales order replaces customer values for Invoice contact and Delivery address contact with "string"	Earlier, sales orders replaced the customer's values for Invoice contact and Delivery address contact with "string", when using endpoint POST api/v2/salesorder, when payload included "string" in values. This has now been fixed.	🔲	9.01.0
GET item range does not return lot/serial class IDs	Earlier, GET item range did not return lot/serial class IDs. This has now been fixed.	🔲	9.02.0

Fix on expandSegmentsValues parameter for GET /dimension endpoint	The parameter expandSegmentsValues for endpoint /controller/api/v1/dimension/{dimensionId} now returns values correctly when set to True/False.	🔴	9.22.0
API JournalTransactionV2 now accepting subaccount segments containing spaces	Earlier, the JournalTransactionV2 did not accept Subaccount segments containing a space. This has now been fixed so that you can use "1" or "1 " if you have a segment with length 2 but it contains only one character It also works with a default sub containing a space. If you have a segment value starting with a space, that will not be accepted in the API or in the UI.	🔴	9.03.0
Now possible to insert a TransferOrder line in PUT PurchaseReceipt	Earlier, it was not possible to insert a TransferOrder line in a PUT PurchaseReceipt endpoint request. This has now been fixed.	🔴	9.21.0
SupplierInvoice endpoint not allowing negative retainage	Previously, when creating an invoice via API, you were not allowed to enter a negative retainage amount. This has now been fixed.	🔴	9.19.0
The "Packages" field exposed via ShipmentDTO (GET Shipment) is not populated	Earlier, the GET Shipment endpoint did not populate the "Packages" field. This has now been fixed.	🔴	8.86.0
Unable to update a customer's "Invoice Address" fields via PUT Customer endpoint	Earlier, in some circumstances, the PUT Customer endpoint did not update the customer's "Invoice Address" fields. This has now been fixed.	🔴	8.86.0
RoundingDifference omitted when using SupplierInvoice endpoint (POST)	Earlier, in some circumstances, the RoundingDifference amount was omitted when creating an invoice via the SupplierInvoice endpoint (POST). This has now been fixed and the solution is under a feature toggle.	🔴	8.89.0
Return order type on webhook response for sales order	Earlier, the webhook for Sales orders did not return the sales order type in the response. This has now been fixed.	🔴	8.25 (200908)
The field Account group retrieved in Account endpoint	In the Account endpoint, the field Account group in the Chart of accounts (GL202500) window was not retrieved at all. This has now been fixed.	🔴	F202005, Visma.Net ERP Kanban week 24, Visma.Net ERP Week 24
Insert and delete lines when using the PUT method on the stocktake endpoint	Earlier, it was not possible to insert and delete lines when using the PUT method on the stocktake endpoint. This has now been fixed.	🔴	8.39.0
Wrong error message on PurchaseReceipt endpoint when supplier is missing	When supplier was missing from the PurchaseReceipt endpoint, you got an error message saying that a customer number must be specified. Now the error message has been changed to "Error creating purchase receipt. New order must have a supplier number specified."	🔴	8.26.0 (8.26.0 8.1036)
Convert lower case letters to capital letters when creating an invoice in API with lower case letters	In earlier versions, when manual numbering was activated for the sales invoices Ref.nbr/Invoice no. and you imported an invoice with an invoice number containing lower case letters, the data was not saved correctly. This led to not being able to match an incoming payment in the Process incoming payments (AR305000) window to the invoice. This has now been fixed.	🔴	8.25 (200908)
API GET Project Endpoint give response status 500	Fix for response Status 500 for GET Project endpoint.	🔴	9.18.1
Trailing space for ProjectCD on GET Salesorder endpoint	In version 8.60 was introduced ProjectCD for GET Salesorder endpoint, which was not trimmed (trailing spaces). This has now been fixed by enabling integrators to use the ProjectCD value directly as a parameter for other endpoints without trimming.	🔴	8.61.0

GET SalesOrder endpoint returns an internal project ID in project	Earlier the GET SalesOrder endpoint returned and internal ID in project. This has now been fixed by adding property ProjectCD containing the visible ID for the project. Enabling integrations to utilize this value. During testing we however found an issue with trailing spaces, so please ensure to trim ProjectCD pre using it. This will be resolved for next version.	🔲	8.60.0
"createdDateTime" and "createdDateTimeCondition" not working via GET CustomerInvoice and CustomerCreditNote endpoints	Earlier, the parameters "createdDateTime" and "createdDateTimeCondition" were not working via the GET CustomerInvoice and CustomerCreditNote endpoints. This has now been fixed.	🔲	8.63.0
"GreaterThanValue" query parameter not working with GET Shipment endpoint	Earlier, the "GreaterThanValue" query parameter was not documented as being deprecated for the GET Shipment endpoint. This has now been fixed.	🔲	8.86.0
The parameters "createdDateTime" and "createdDateTimeCondition" are not working in the GET Inventory endpoint	Earlier, the parameters "createdDateTime" and "createdDateTimeCondition" were not working correctly in the GET Inventory endpoint. This has now been fixed.	🔲	8.25 (200908)
Last modified date as UTC in the Branch endpoint	When using GET for a branch or range of branches, the "lastModifiedDateTime" is now shown as UTC.	🔲	8.74.0
POST PurchaseReceipt and PUT PurchaseReceipt endpoints return error	The endpoints POST PurchaseReceipt and PUT PurchaseReceipt no longer incorrectly return an error when the content contains "landedCost".	🔲	9.20.0
Credit note now subtracted from invoice when creating customer payment via API	Earlier, when creating a customer payment with an invoice and a credit note using the CustomerPayment API endpoint, the credit note was not subtracted from the invoice. This has now been fixed.	🔲	9.76.0
POST api/v1/shipment /<shipmentnumber>/action /printshipmentconfirmation returns error message when using Visma Service API token	Earlier, when using Visma Service API token, POST api/v1/shipment/<shipmentnumber>/action /printshipmentconfirmation returned "Error you do not have enough rights to access SO64200S". This has now been fixed.	🔲	9.67.0
Purchase order link and purchase receipt fixed with feature toggle	Purchase order link and purchase receipt have been fixed and set behind a feature toggle. During the 11. of January this will be available for all customers.	🔲	8.78.0
Improved performance on GET ALL CustomerPayment endpoint	The performance of the CustomerPayment endpoint has been improved.	🔲	8.88.0
Improved performance on GET SupplierInvoice endpoint	The performance of the GET SupplierInvoice endpoints has been improved. Issues that were found with some of the available parameters during earlier activation have been fixed. The improved endpoint will be activated for all companies.	🔲	9.80.0
Linear degraded performance from GET salesorderbasic endpoint when increasing page number using pagination	Previously, when you called the GET Salesorderbasic endpoint, its performance linearly degraded when increasing the pageNumber parameter. This has now been fixed, in addition to a generic performance improvement of ~25% showed on our test company (the effect of this depends on the number of sales order documents and lines in the system).	🔲	8.59.0
Webhook for salesorder wrongfully triggered for response status 4xx or 5xx when creating shipment via POST endpoint /controller/api/v2 /salesorder/{saleOrderNumber} /action/createShipment	When you try to create a shipment for a specific sales order with not all lines available in stock, you will no longer get a wrongful webhook notification indicating the sales order status has changed to status 'Shipping'.	🔲	9.20.0
When using no filter for some endpoints, the response includes the entire collection of data instead of the first page with page size=max page size	Errors have been found at some endpoints. When no filter is used, the entire collection of data is in the response instead of returning first page with page size=max page size. This has caused performance issues and the problem has been fixed.	🔲	9.57.0

POST SalesOrder via API v1 and v2 no longer creates sales order with incorrect currency	Earlier, when 'Enable currency override' was not selected for a customer, the POST SalesOrder endpoint still allowed a sales order to be created with a currency other than the default currency for the customer, which resulted in incorrect prices on the sales order. This has now been fixed for v1 and v2, and you will need to select 'Enable currency override' in the Customers (AR303000) window to be able to create a sales order with a currency other than the customer's default currency.	🔲	9.71.0
PUT Stocktake endpoint (v2-version) not generating value on variance cost	Earlier, the v2-version of the PUT Stocktake endpoint did not update variance cost neither on header or lines. Also delete stocktake line from UI did not recalculate header totals. This has now been fixed.	🔲	8.75.0
Improved logging, error handling and performance in the GeneralLedgerTransactions endpoint	The performance of the GeneralLedgerTransactions endpoint is improved. Also, the logging mechanism and error handling are fixed: before 9.46, when an error was thrown during the API call, it was not reaching the caller, but it was hidden in the backend implementation. Now that is fixed, and the caller will receive the error when that is the case.	🔲	9.47.0
Split location with PUT purchase receipt endpoint	Earlier, it was not possible to split location when you run the PUT purchase receipt endpoint. This has now been fixed.	🔲	8.48.0
Issues with allocations after introducing default qty=1 on sales order (SO301000) and sales invoice (AR301000) in 9.05	In version 9.05 was introduced default qty=1 for sales orders (SO301000) and sales invoices (AR301000). Just after activating this in production, it came up that it gave issues for sales orders created via the POST salesorderv2 endpoint regarding allocations, leading to shipments not being possible to create. The issue has now been resolved and will reactivate the default qty=1 as standard again. There is one change compared to implementation done for version 9.05. Now the default quantity 1 is only set when you either POST a line with inventory ID, or if you in the UI select item ID on the line. For this reason adding lines without a reference to item will not automatically set the quantity to 1.	🔲	9.09.0
Update notes via API (PUT) on SupplierInvoice when status is "Open"	Earlier, updating notes via API (PUT) on SupplierInvoice endpoint, when the status of the document was "Open", was not possible. This has now been fixed.	🔲	8.86.0
PayDate is not updated in accordance to the supplier's payment settings	In the SupplierInvoice endpoint, sending a dueDate without payDate set dueDate as per request, but incorrectly set payDate according to creditTerms and not leadDays settings on the supplier as intended. This issue has now been fixed.	🔲	F2020 05
Wrong "Location" URL returned after successful POST CustomerCreditNoteV2 request	Earlier, the wrong "Location" URL was returned after a successful POST CustomerCreditNoteV2 request. This has now been fixed.	🔲	9.08.0
Update Freight cost and Freight amount fields with shipment allocation lines	Earlier, the Freight cost and Freight amount fields were not updated while updating shipment allocation lines. This has now been fixed.	🔲	8.22 (20052 6 Releas e), Visma. Net ERP Kanba n week 24, Visma. Net ERP Week 24
The GET customer endpoint does not return all customers	Earlier, in some cases, when using the GET method on the customer endpoint, not all customers were collected. There were some issues in how the data being retrieved. This has now been fixed.	🔲	8.41.0
Improved performance on GET SupplierInvoice endpoint	The performance of the GET SupplierInvoice endpoints has been improved. The issue that was found during activation earlier (Version 9.80) where some of the response fields were being excluded has now been fixed. The improved endpoint will be activated for all companies.	🔲	9.83.0

Error creating journal transaction through API when segments of selected subaccount were part of a restriction group	When posting a transaction through JournaltransactionV2 endpoint, the subaccount was set before account. This caused an error if segments of the subaccount were a part of a restriction group. This has now been fixed.	🔲	9.48.0
POST SupplierPayment inserting debitadj into the payment and hold is set to false in payload	There was an issue, if a payment method was used, which does not have the additional processing "Create batch payment" and instead set to not required (CA204000). In this case, the Hold option can be set to false. The issue was located in a specific scenario; - Hold was set to false in the payload - Payment method used is not requiring batch payment - Including debit adjustment into the payment The validation of payment amount would deny the insert. This has now been fixed. When posting a Supplier payment, by default the behaviour of Hold is set to true in the payload. With the "batch payment required", the Hold option can't be removed.	🔲	9.82.0
POST SalesOrder with TenantID authentication works normally again	POST SalesOrder with TenantID authentication no longer gives error message 'Object reference not set to an instance of an object.'.	🔲	9.83.0
Related inventory issues are not automatically released when releasing customer invoices via API	Earlier, when calling a release operation for a customer invoice (SO303000) via API, the related inventory issue was not automatically released. This has now been fixed.	🔲	8.38.0
GET operation on inventory with alternateID using $batch endpoint not returning correct data	Earlier, the GET operation on inventory with alternateID using the $batch endpoint was not returning correct data. This has now been fixed.	🔲	8.25 (200908)
POST/PUT via Supplier endpoint not allowing certain combinations of account and subaccount to be used when restricted combination would be met during the call	Earlier, you could not create or update a supplier via the Supplier endpoint with account and subaccount restrictions in place. The issue took place in a scenario where the account and subaccount starting values from the default supplier class would come across a restricted combination during the insert of new values. Error denied the call if a restricted combination was recognised, while updating the fields from the defaults to new values. This has now been fixed for the following endpoints: - POST /api/v1/Supplier - PUT /api/v1/Supplier/{supplierCd} This will be released only for pilot customers at first.	🔲	9.84.0
The "Owner" field is left out in POST/PUT via Sales order endpoint	Earlier, when owner was added in the API for PUT and POST for Sales order, the Owner field was left blank when the order was created or updated. This has now been fixed so that you can get the user ID of the employee from the Employee endpoint, and use this for setting the owner in the sales order.	🔲	8.24 (200623)
POST sendbymail endpoint now uses email notification template according to order type	The POST sendbymail endpoint no longer fails to consider the order type for the email notification template.	🔲	9.85.0
Not possible to change modificable details on a released purchase invoice or retainage invoice which shared same supplier reference no	When a supplier invoice containing retainage is released (AP301000) using the same supplier reference as the retainage invoice, it was not possible to change details of either of these documents. This has now been fixed.	🔲	9.85.0
Duplicate payment lines in SupplierPayment endpoint when payment has been voided	In some situations, duplicate payment lines were created in the SupplierPayment endpoint when you voided the created payments. This has now been fixed.	🔲	8.33.0
"Same as main" incorrectly set in Suppliers window for suppliers created via API	Earlier, the Same as main option was incorrectly set in the Suppliers (AP303000) window for suppliers created via API. This has now been fixed. The solution will be deployed in production under a feature toggle.	🔲	9.06.0
Creating a foreign supplier for a Norwegian company working via API	Earlier, you were not allowed to create a foreign supplier using POST Supplier endpoint for a Norwegian company. This has now been fixed.	🔲	9.25.0

Changing the address to a foreign one on a domestic supplier not working via API	Earlier, when you changed the address of a domestic supplier to a foreign one via API, the change was not working. This has now been fixed.	🔴	9.23.0
PUT Location Endpoint returns HTTP "400" Bad request instead of "404" Not found when the asset is not found	PUT Location endpoint will from version 8.91.0 return "404-Not found" instead of "400-Bad request" when the asset is not found.	🔴	8.91.0
Purchase orders with the status Cancelled can no longer be added to purchase receipts	Purchase orders with the status Cancelled can no longer be added to purchase receipts.	🔴	9.27.0
POST / PUT "LandedCost > Currency" via Purchase Receipt Endpoint API	Earlier, it was not possible to create or update "LandedCost > Currency" using POST /v1/PurchaseReceipt or PUT v1/PurchaseReceipt/{receiptNumber}. This has now been fixed.	🔴	9.86.0
PUT Inventory returns "tstamp cannot be empty"	Earlier, the PUT/api/v1/inventory method sometimes returned an error message regarding tstamp, when item classes had 'Replenishment settings' added. This has now been fixed.	🔴	8.30.0
JournalTransactionV2 API returned duplicated transactions when using paging	For a large number of transactions and lines, the JournalTransactionV2 API returned duplicated transactions when paging was used. This has now been fixed.	🔴	8.67.0
Release of purchase invoice via API missing link to batch, invoice stuck in Balanced status	This specific problem occurred in some occasions during heavy API load together with overlapping actions, where the released purchase invoice may have incorrectly remained in the Balanced status after it was released via SupplierInvoice endpoint. In this scenario the full release operation was not able to finish. Meaning, even though the release process was successful and a batch was created, if the batch failed to link the documents (the Financial details tab not showing a link to the batch no.), due to this the purchase invoice document remained in the Balanced status. The fix has been added under a feature toggle and will be initially activated for specific companies only. Within the fix behaviour added a retry for the release from API, if the release fails due to concurrency. Fix will later be included into all companies.	🔴	9.83.0

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Purchase to Pay

Release Notes.

Matching outgoing AutoPay payments automatically with 30 character-end-to-end ID

VAT details editing is disabled in Purchase invoices window for non-taxable branches

Payment lead time disabled in Supplier ledger preferences

Added support for Release action on purchase invoice import

Window title change in Swedish

Not allowed to delete a payment with a general ledger reference number

Rounding of supplier write-off requires a control account

Error when pasting a copied purchase invoice

Change supplier reference on Tax agency invoices/purchase credit notes

Closing a VAT report when using an account in posting with an account group with a value

Allow posting on closed periods in General ledger preferences in posting tax agency invoices to corresponding open period

No more error message when using the same supplier reference for a Tax agency

New reason code for the Supplier write-off functionality

New functionality for changing supplier on purchase orders

New functionality for changing supplier on documents

Splitting lines in Approval Editor with row-level security activated

Attachments available in the Approve supplier bank details window

"Last modified by" column now available in Approve supplier payment details window (AP50950S)

Batch payments for outgoing payments (created via AP50301S) no longer showing in Batch payments (AP3050PL)

Exposed fields Banking Detail Type and Detail ID in GET Supplier Endpoint

Lookup verification for the INVOICE_RESPONSE activation statuses

Improvement in performance for Supplier payments (AP302000)

Endpoint update to get the workflow graph image from Approval Center

Override the number series of supplier payments created via API

Improvement in performance for import of suppliers

New setting suggesting automatic application of credit notes and prepayments for purchase invoices

Performance improved in Purchase invoices for loading and saving actions

Purchase receipt line can now be added more than once inside the same purchase invoice document

Performance for release of invoices in foreign currency improved

Improvement in performance of Release supplier documents window

Invoice responses for purchase invoices (PeppolBIS30)

"Reverse" action for SupplierInvoice exposed for API

Performance of Balance by supplier report improved

Process invoices and credit notes automatically when amount to pay is 0

Create a payment with invoices having the same payment date (when not using the Pay separately option)

Purchase credit notes drill-down from the reference number and new View payment button

Create, save and release supplier payments/refunds without any document applied

Cash discount settings move from the new Process payments window to Supplier ledger preferences window

New report added - Purchase receipt simulated accrual summary (PO63050S)

Improved performance in Purchase invoices (AP301000) when using different ADD PO functions

Show pop-up with link to New payment service when a batch is part of a request and when clicking Send payments

Retainage functionality enabled for purchase credit notes

Preparing for the discontinuation of the Classic payment service on October 3rd

"Match item during import" feature enabled for Contracting works customers

Performance of Supplier prices (AP202000) window improved

New column for external item ID in Purchase invoices window (AP301000)

New option Override payment date with current date for New payment process

Purchase invoices window will remember user's selections from View files / Hide files function

Branch information is now available in Approval Editor

Columns for Branch ID and Branch name included in Release supplier ledger documents window

Subaccount split columns added to column configurator in Approval document line history window.

Re-download missing invoice attachments in Invoice Inbox

Changes in Approval Editor to improve performance

Import buyer's reference and map to buyer's order number

New field in Purchase invoice window to show the VAT description

New translation in Swedish needed for the report Cash requirements (AP61200S)

Edit purchase invoice description after release

Show files when splitting a purchase invoice line

"Files" option enabled for Light User role

Supplier's article number in visible in the Purchase invoices window

New field Business account name in the Run recognition (DR501000) window

Reverse action enabled for purchase credit notes in Purchase invoices window

Supplier reference in copying/pasting purchase invoices

Change document type of scanned documents in Invoice inbox

Changes in the layout of the Process payments (AP50300S) window

Message processor for Approval messages to scale

Improved performance of Supplier details (AP402000)

Attachments added in Approval Center available in Purchase invoices window

New columns in the Process payments (AP50300S) window

Deferral from a selected date on incoming invoices

Change account used for payment after a purchase invoice is released

New functionality for changing customer on documents

Rounding issues when amounts paid in bank not 100% matching to the sent paid amounts in ERP due to rounding rules

Odp Company Id	1204207
Name	Asianajotoimisto DLA Piper Finland Oy
Copy database:	OK

Customer noticed that one supplier has small balance from voided payment. Balance by account AP63200S.

Purchase invoice 212354 looks ok, it has no balance and in Applications tab everything seem to match.

The difference is caused by payment 311449. I has payment amount 408,93€ but amount paid is 407,20€.

We could not figure out how to solve this problem. Is there a way to correct the payment amount on payment 311449?

Priority is high because customer is already closing financial year 2023.

Invoices approved in Approval not automatically released

Fixed issues in the columns of the Supplier details (AP402000) window

Batches going out of balance after splitting an invoice line

Corrected window ID opened from Supplier ledger menu

Approvers not able to split invoice line in Approval Editor

Improvements to performance when importing purchase invoice documents

Error on change of Inbox rule

Default account set in document template not always used with zero VAT

Incorrect changes related to G-account and retainage functionality rolled back

GET Supplier endpoint not displaying details on supplierPaymentMethodDetails correctly

"Show files" button not working in Purchase invoices (AP301000) window

Impossible to release a credit note when the Release document from Approval setting is not active

Four eyes principle for One-time, On hold, Hold Payments, or Inactive suppliers and Employees

Error with bank account validation in processing of payments

Error on customised inquiry Suppliers (AP3030PL)

Manually imported document from the IA20200S window triggered invoice response

Change of invoice balance when adding rounding difference

Error in Supplier history summary with branch name in string format

Issues with the Add purchase order option from Purchase invoices (AP301000) window

Inserting purchase order with non-stock item which has 0 quantity into purchase invoice document

Document status for invoices processed by prebooking resulting in an error at the Invoice Inbox and the Hold status was not applied

Purchase invoices not released in some circumstances

Issues in releasing retainage invoices from Release supplier documents

Retainage invoice for invoices released via API not created and released automatically

Translation for "Suggest applications for purchase invoices before release" in Supplier ledger preferences window changed in Norwegian

Release supplier documents giving an error for companies with a lot of data

Validate supplier balances reopened prebooked documents already matched and closed

Performance in report Supplier history summary (AP652100) improved by replacing it with Supplier history summary (AP406000)

Error when updating payment status

Balance discrepancy when refund is voided

Performance improvement for Supplier prices (AP202000) and Supplier price worksheets (AP202010)

Error when releasing invoice having a payment method without payment instructions

Processing invoice when using restrictions on account level

Override payment date with invoice date for imported credit notes

Error when using Supplier details inquiry from the Suppliers (AP303000) window

Aging reports not showing prepayment documents registered from AP301000 when payment document is applied

Aging reports not showing prepayment documents

Autosave not in place for manually added values in transaction descriptions or subaccounts fields

When pressing Enter button in Order no. field with Show files selected, system opened attachment

Batches going out of balance after splitting an invoice line

Link from Purchase invoices pending payment window fixed

Subaccount and transaction values reset to default in Document Editor

Change of purchase invoice date updating original invoice date

Balance by GL account window showing voided prepayment with an open balance

Split, change accounts on several lines, correct cost and SAVE not properly working in Approval Editor

Attachments not showing properly

Inconsistent behavior of "Send to Approval" options in Suppliers window

Account used for payment displayed incorrectly if second location was using the same as default location setting in the payment settings

Discrepancy between date and period for payments

Aging reports show suppliers with zero balance

Error message when opening Approve purchase invoices for payment (AP502000) window

Column order customisation not working properly in Approval Editor

Incorrect unreleased retainage amount when validating supplier balances

Not able to fill Balance field from import by scenario with migration mode

Reverse application option locked for correction documents

New validation for payment reference setup to 0

Not possible to add or edit an activity, or open the Non-stock items window.

VAT amount and Taxable amount not correctly copied onto correction documents

Document went out of balance after several split/undo split invoice lines in Approval Editor

Purchase invoices' due date recalculated from terms after adding purchase order receipt

Column order customisation not working properly in Approval Editor

Split line applying recalculation in VAT details for documents that were already pre-booked

Wrong account number added on child items after saving in Approval Editor

Project number disappeared when changing cost account in Document Editor

Invoice inbox setting: "Use due date from payment term settings" not updating payment date

Empty post period when sending to Approval from Invoice inbox

Creation of manual payments on corrected invoices in Supplier payments prevented

Inactive subaccounts available in Approval Editor

Invoice image not correctly displayed when using Show files option in Purchase invoices window

Warning message when changing supplier on purchase invoice

"Correct invoice" feature disabled for tax suppliers

VAT category not copied from original invoice with discounts when VAT category is empty

Error with invoices from Invoice inbox when "Move invoice to next open/active" was enabled and next open is same as current period

Correct IBAN failing validation

Validation of Payment ref. no. field on purchase invoice incorrectly required by VnE

VAT category not copied from original invoice when VAT category is empty

Manual payments option enabled for original purchase invoices connected to unreleased correction documents

Correcting invoice feature not working properly with closed and inactive financial periods

Invoice fee an own row when receiving invoices through AutoInvoice

Not possible to show/preview files in Purchase invoices and Invoice Inbox windows

Impossible to move a supplier with voided documents to Inactive status

Updating supplier through Invoice Inbox logged false positive entries for IBAN change in the audit history

Show invoice as default instead of attachment on purchase invoice

Pre booking invoices with discounts gives booking on rounding acc

Bug found on: 2023401006
SRT: Take a company with Expense reclassification option activated (screen: CS100000)
1. Create a vendor
2. Set up a vendor discount code (AP204000) on vendor created to step 1
3. Set up a vendor discount (AP205000) for discount code created to step 2:
4.Create a supplier invoice on the vendor created to step 1 (AP301000)
5.Pre Book the invoice:

- Check the GL transactions:
- Gives a booking on rounding account. This is wrong.
  Expected result: No booking on rounding account.
  6. Release the invoice
- Check the GL transactions:
- Gives again a booking on rounding account. This is not expected.

More details on the document attached.

Correct BIC information when using multiple locations on supplier

Document went out of balance after several split/undo split invoice lines in Approval Editor

A new warning message added when paying an invoice with missing SPOT rate

Splitting/Undo splitting invoice lines changes amounts on invoice

Disabled changing payment location on Financial details tab of Purchase invoices window

Validate only selected payment instruction in Suppliers window

Write-off functionality not working

Two users not able to process the same invoice at the same time in Invoice Inbox

Several errors in Approval Document Editor when splitting lines

No update in APTran and TaxTran after changing the SupplierID in Purchase invoices window

Generate VAT debit adjustment not working properly

'Override number series upon import' not working in Schedule import scenarios window

FIK payments for invoices with credit notes applied (DK)

Unable to delete a voided supplier payment in status Balanced/On hold

Prepayments matched to invoices not considered when sending to Autopay

Incorrect date and period for retainage invoices created in Create purchase retainage window

Deferral schedule amount calculation when partial deductible VAT is used

The column Active available in Deferral codes window (DR2020PL)

Filtering in Release supplier documents based on Approval status and comments

Deferral code not applied on Invoice inbox rule

Already invoiced PO receipts showed up on purchase invoice

Active option to change VAT amount on prebooked invoices

Incorrect business date for write off documents

Write-off account set to supplier account if reason code is connected to a cash account

Adding attachments to purchase invoices fails

Due date not set correctly on invoice when using a credit term with instalments

Split line/undo split on pre-booked invoices cause the invoice to go out of balance

The lastModifiedDateTime and lastModifiedDateTimeCondition parameter updated for several endpoints

UnitCostInCurrency with zero value overwritten

https://drive.google.com/file/d/1DUDcz4MLTjqyFmJSnLQGzxABc607ADIm/view

https://drive.google.com/file/d/1DUDcz4MLTjqyFmJSnLQGzxABc607ADIm/view

Supplier error in the Generate VAT purchase debit notes window

Create payments button disabled in payment windows

Wrong Inbox error message when supplier has no terms

Wrong project tasks in Approval

Pay separately functionality on retainage invoices

Wrong net amount in journal transactions when using gross VAT calculation

Filter by max. amount in Process payments window

Purchase invoices - overview (AP40103S) performance improvements

Balance by GL account not showing pre-booked invoices

Releasing credit notes matched with credit adjustment not working in Release supplier documents window

Error messages in AutoPay inbox

Voiding a supplier refund for early supplier refunds

Payment date mandatory filter in Process payments window

Automatically create a retainage invoice when using Approval

Release voided documents with "Hold batches on entry" selected

Error in pre-booking partially deductible VAT and deferral code

Calculate retainage amount from gross values independent of VAT calculation settings

Import total amount of invoices instead of total amounts including VAT

Voided purchase invoices in the Balance by GL account report

Invoice inbox rules not working with some supplier settings

Wrong date in retainage invoice release

Supplier price worksheet imports wrong source price from Excel

Validation of supplier balances not possible for suppliers with retainage

Purchase invoices not showing in the Release supplier documents (AP501000) window

Split line/undo split line actions causing document amount to change

Moving invoices On hold to a different period not working

Validation in place for all the Danish payment methods

Changes in columns not saved

Incorrect rights assigned to "Light user" role

Voided documents included in VOP file to AutoPay leading to negative amounts

Match supplier refunds with credit notes with a future date

Supplier validation in Invoice inbox

231 opgaver

Order Core

Release Notes.	Documentation	T	Ret versi
Improved performance in the Purchase receipts list window	The performance in the Purchase receipts (PO3020PL) list window has been improved: - Loading the window takes approx. 48 % less time, - Opening the Purchase receipts (PO302000) window by clicking the Add new record button, takes approx. 36 % less time.	☑	9.72.0

Improved performance in the Purchase orders window	Earlier, in the Purchase orders (PO301000) window, it took a long time to open an order, add lines and release an order. The performance has now been improved, and these actions take 45 % less time than before.	☑	9.53.0
Improved performance in the Purchase orders list window	The performance in the Purchase orders (PO3010PL) list window has been improved. There are no measurements available.	☑	9.55.0
Improved performance in the Sales shipment history by item window	Earlier, the Sales shipment history by item (SO40103S) window took a long time to open. This has now been improved, and the window opens 56 % faster.	☑	9.51.0
Improved performance in the Purchase order list window	Earlier, the Purchase order list (PO40100S) window took a long time to open. This has now been improved, and the window opens 78 % faster.	☑	9.51.0
Improved performance in the Sales order history by item window	Earlier, the Sales order history by item (SO40102S) window took a long time to open. This has now been improved, and the window opens 29 % faster.	☑	9.51.0
Improved performance in the Process shipments window	The performance in the Process shipments (SO503000) window has been improved and the different processes are up to 20 % faster.	☑	9.61.0
Improved performance in the Process orders window	The performance of the actions 'Create shipment' and 'Prepare invoice' in the Process orders (SO501000) window has been improved. No measurements available.	☑	9.63.0
Improved performance in the Create purchase orders (PO505000) window	Earlier, processing lines in the Create purchase orders (PO505000) window took a long time. This has now been improved, and the processing of lines takes 50 % less time than before.	☑	9.54.0
Change quantity on sales or purchase order linked with drop-shipment	For a sales order linked to a purchase order with drop-shipment, when you change the quantity on the sales or purchase order, you will now receive a warning or error message telling you to also change the quantity on the linked order. This solves the problem of not being able to create a sales invoice when you have changed the quantity on only one of the linked orders.	☑	9.66.0
Improved performance in the Sales order list window	The Sales order list (SO40101S) window loads faster than in earlier versions.	☑	9.49.0
Rounding behaviour in sales order line Disc. unit price field unified with Ext. price field	Previously the discounted unit price value rounded up, which in some calculations caused the discounted price to exceed the extended price, and in a certain scenario this led to problems with creating the invoice. This has now been fixed.	☑	9.20.0
Window IN617500 title change	The title of the Preview default cost change (IN617500) window has been changed to "Preview standard cost change" in user language English (United Kingdom).	☑	9.12.0
System using wrong sales account on sales order depending on order type	There were different scenarios when creating a sales order with item or without item. - In scenario 1 when using a customer location, sales account was set from posting class or customer location. - In scenario 2 when using a posting class, sales account was set from posting class or customer location. - In scenario 3 when using a warehouse, sales account was set from posting class or customer location. - In scenario 4 when using a reason code, sales account was set from posting class or customer location. Now the sales order lines have been fixed to match the right sales accounts.	☑	8.96.0
Window title changes in Swedish	The following changes have been made in Swedish: - The Sales order preferences (SO101000) window title has been changed from "Försäljningsordrar" to "Inställningar försäljningsorder". - The Sales order list (SO40101S) window title has been changed from "Försäljningsorder" to "Lista försäljningsorder".	☑	8.88.0
Field for shipping terms in two purchase order reports	There is a new field for shipping terms in two of the purchase order reports: - Purchase order (PO64101S) - Purchase order, right address (PO64108S)	☑	8.41.0
Remove the option "Recalculate discount on partial shipment" from the Order types window	The rarely used option "Recalculate discount on partial shipment" in the Order types (SO201000) window, has been removed since it caused issues with VAT and discounts. It will no longer be available in the system.	☑	8.26.0 (8.26.0 8.1036)
Implement a new inquiry, Sales invoices history by Items, based on the Sales order history by items inquiry	There is a new inquiry implemented, called "Sales invoices history by Items", to help users to see the sales by item based on all sales order invoices (AR invoices are not included). The new screen ID is SO40104S.	☑	Future Versions

Improved performance in the Shipments window	The Shipments (SO302000) window loads faster than before.	☑	9.47.0
Performance improvement when opening sales order with kit item	The performance in the Sales orders (SO301000) window has been improved. Earlier, when you opened a sales order containing a kit item, it could take approx. 1 minute for some customers. Now, it takes approx. 2 seconds.	☑	9.49.0
Add lines not in a sales order to a shipment	In the Shipments (SO302000) window, for open shipments, you can now add lines that are not in a sales order. The new lines will automatically be added to the sales order from the first shipment line.	☑	9.59.0
New functionality for changing supplier on purchase orders	You are now able to change supplier on a purchase order with order lines in the Purchases (PO301000) window if the status of the order is On hold. Note that changing the supplier will only change the data in the order head section, not in the order lines!	☑	F2020 05, Visma. Net ERP Kanba n week 24, Visma. Net ERP Week 24
Add 'Contract document ref.' in sales order	You can now add the contract document reference directly in the Sales orders (SO301000) window, on the Financial settings tab. This reference is also copied to the invoice.	🔖	9.87.0
Packaging type length, width and height information in Shipment confirmation report	The length, width, and height information from the Packaging types (CS207600) window is now available in the Shipment confirmation (SO64200S) report.	🔖	9.86.0
Improved performance in the Process shipments window	Updating shipments with several thousands of lines in the Process shipments (SO503000) window is now approx. 25% faster.	🔖	9.86.0
Non-stock kit quantity on open and on hold sales orders now displayed in the Sales orders window	When you select a line with a non-stock kit in the Sales orders (SO301000) window, the quantity of this non-stock kit on open and on hold sales orders is now displayed in round brackets in the table footer.	🔖	9.24.0
Price code description now displayed in the Sales prices window	Price code description is now displayed in the Sales prices (AR202000) window for the price types Customer and Customer price class.	🔖	9.26.0
Item quantity on purchase orders and purchase receipts visible in the Purchase orders window	When using the Purchase orders (PO301000) window, it is now possible to see the quantity of an item on purchase orders and purchase receipts in the item line's table footer. It is no longer needed to look up these quantities in the Add item dialog box.	🔖	9.19.0
Receipt date column added to Purchase orders window	The Receipt date is now visible in the Purchase orders (PO301000) window on the Purchase receipt tab.	🔖	9.03.0
Alternative ID available in Purchase receipts window	The Alternative ID column is now displayed also in the Purchase receipts (PO302000) window.	🔖	9.04.0
Period filter added to purchase receipt accrual reports	A new filter for period has been added to the Purchase receipt accrual summary (PO630500) and Purchase receipt accrual details (PO631000) windows. You can now simulate accrual details on purchase order receipts by the "To period" option. When earlier periods are chosen as this period, these two reports will display the currently excluded receipts by the condition, if the receipt still included uninvoiced quantity and/or amounts on the last day of the selected period.	🔖	9.19.0
Added support for creating multiple shipments for the same sales order	You can now create multiple shipments for one sales order so you can optimise the picking process for multiple employees and offer separate deliveries over time. In the Shipments (SO302000) window, via the 'Add order' button, you can add the sales order lines you want to include in one shipment. After saving, you can add a new shipment and add other lines from the same sales order.	🔖	9.44.0

Performance improvement in the "Select - Customer" pop-up window	Earlier, when searching for customers, the performance of the "Select - Customer" pop-up window was slow. This has now been improved.	🔖	8.99.0
Item availability visible in the Purchase orders window	When using the Purchase orders (PO301000) window, it is now possible to see the availability for an item in the table footer. It is no longer needed to look up the availability in another window.	🔖	9.17.0
Improved performance in multiple areas inside the O2C domain	There are generic performance improvements in the data access layer, which will affect all functionality (applies to API, screens, generic inquiries, and reports) in the following areas inside the O2C domain: Discounts, Payment methods, Customer prices, Attributes, Customer, Customer classes, Customer invoice, Sales invoice, Incoming payments, Freight handling, and sending of electronic invoices (Visma XML and Peppol BIS 3.0). The effect of this will vary based on document size or the entity you are working on, and the number of documents and entities existing in your company. It applies to retrieving, creating, and updating data, and affects logical scans and scan counts in the SQL server in a very good way. Some of these changes will also have a positive effect on areas outside the O2C domain, that are referring to these documents or entities.	🔖	8.50.0
Change the name of the 'Print description on sales orders' check box	The 'Print description on sales orders' check box in the Sales orders (SO301000) window needed a new name to better reflect what the setting actually does. The new name is 'Show description on order confirmation and invoice' and will be available from version 8.38. The translations are updated accordingly.	🔖	8.38.0
New column Alternate description in Purchase orders window	A new column named Alternate description has been added to the Purchase orders (PO301000) window. This will be updated from the stock item's details, from the Cross-reference tab (IN202500) when using a supplier part number and adding an alternate ID and description. The Alternate ID was available from before.	🔖	8.47.0
Possibility to add item cross-references in reports	It is now possible to add item cross-references (Barcode, Global, Customer part number) by adding new data sources to the following reports: - Quote (SO64101S and SO64108S) - Sales order (SO64118S and SO64111S) - Shipment confirmation (SO64200S and SO64201S) - Pick list (SO644000) - Proforma (SO64300S) - Invoice (AR64108S, AR64118S, AR64105S, AR64110S, AR64106S, AR64104S, AR64102S, AR64101S and AR64103S) - Assembly (IN30702S and IN30701S) In addition, the new data sources are also available for copied reports (with prefix RE).	🔖	8.40.0
Improved overview of notes added to a document	It has been difficult to notice if someone has added internal or external information to a document, like a purchase order, sales order, or an invoice. There has been only a very small red balloon indicating that there is some text. Now, you see the number of the notes after the Notes link in the top part of the following windows: - Purchase orders - Sales orders - Shipments - Invoices - Sales invoices - Purchase receipts - Purchase invoices	🔖	8.25 (200908)
Update the error message when there are more lines on the purchase order type Drop-shipment, than the lines linked in the sales order	An update has been made to an error message in Sales orders (SO301000), which will happen when there are more lines on the Purchase order type Drop-shipment (created from a sales order), than the lines linked in the Sales order. The error will occur when the user tries to prepare the invoice. The new error message is: "Additional drop-ship lines that have been added to the connected purchase orders (xxx, xxx ...), have not been updated to the sales order. In order to prepare the invoice, you must reopen the sales order or create another one and add the missing lines from the purchase orders".	🔖	8.26.0 (8.26.0 8.1036)
The inquiry "Sales order history by items" should have clickable links to related item IDs	Clickable links are now available for item IDs in order to support better usability of the inquiry. The links will open the corresponding items.	🔖	8.25 (200908)
Rename the Sales history by items inquiry to Sales order history by Items	The Sales history by items inquiry (SO40102S) has been renamed to Sales order history by Items.	🔖	8.25 (200908)

Implement Sales shipments history by items inquiry based on the Sales history by item inquiry	There is a new inquiry implemented, called "Sales shipment history by items". This inquiry will help you see the sales by item, based on all shipped items. The new screen ID is SO40103S.	🔖	8.25 (200908)
New inquiry Sales invoices history by item, based on the Sales order history by item inquiry	There is a new inquiry implemented, called "Sales invoices history by Items", to help users to see the sales by item based on all sales order invoices (AR invoices are not included). The new screen ID is SO40104S.	🔖	8.25 (200908)
Missing translations for some labels on the report Pro forma invoice (SO64300S)	Some labels in the Pro forma invoice (SO64300S) report were not translated according to the customer's printing language on the shipment. This has now been fixed.	🔖	F202005, Visma.Net ERP Kanban week 24, Visma.Net ERP Week 24
Column Email available in the Process sales invoices window	The column Email is now available when you select the Email invoice action in the Process sales invoices (SO505000) window.	🔖	9.26.0
Customised reports available in data entry windows	The window is available under More items - Configuration - Customisation. In this window, you select a window and step (related to the status of a document) and then add a report ID in the grid by pressing the + sign. This is used to make customised reports available, in addition to the default reports in the data entry windows. The new line will inherit parameters from the existing line you have the focus on. So please make sure you have the focus on the correct default report when adding the new entry. You need to have the Administrator role to have access to this routine.	🔖	8.23 (200609)
Customers purchase order and purchase order line in EDI process	We have added a new field called External link in the Sales orders, Shipment and Customer invoice windows and endpoints. The value in External link is moved between these windows via the actions: From Sales orders to Shipment when the action Create shipment is done, and from Shipment to Customer invoice when Prepare invoice is done. This applies both to UI and API. The field is only editable in the Sales orders window and the SalesOrder endpoint. In other places it is read only.	🔖	F202005, Visma.Net ERP Kanban week 24, Visma.Net ERP Week 24
Alternative description field in layout templates for purchase orders	Earlier, the Alternative description field was not available in the layout templates for Purchase order. This has now been fixed.	🔖	9.17.0
Warning about missing account /subaccount on purchase order receipt	If purchase accrual subaccount is missing on a purchase order receipt (PO302000), you will now get an error messages saying that you need to fill it in.	🔖	8.50.0
Remember the last used recalculate options when copying a quote to a sales order or copy sales order	When you create a sales order based on a quote or copy sales order, you get three options: Recalculate unit prices, Recalculate discounts, and Override manual discounts. These are now saved for each user, so the next time you do the same operation, the system will remember the last selection you made. This will reduce the risk of setting the wrong options when you create a sales order based on a quote.	🔖	8.30.0
The standard quantity for items on invoices and sales orders should be 1, not 0	Earlier, the standard quantity for items on invoices and sales orders was set to 0. This has been changed and the standard quantity is now set to 1.	🔖	9.05.0

Copy header note and attachment order to shipment and invoice	You are now able to copy the header note and header attachment of a sales order from an order to a shipment and from a shipment to an invoice. Under order types, there are four new check boxes for this.	🔖	8.25 (200908)
Fixed time-out when adding drop-ship purchase order to purchase return	Earlier, in the Purchase receipts (PO302000) window for purchase returns, adding a drop-ship purchase order could take over 10 minutes and eventually time out for customers with a large amount of drop-ship purchase orders. This has now been fixed and it will take approx. 30 seconds to open the list of drop-ship purchase orders.	⩗	9.85.0
Performance improvements for the Sales orders window	In the Sales orders (SO301000) window, the performance has been improved for: - Loading Invoice and Delivery address, - Calculating Total line discount, - Setting the default Account and Subaccount on the line, - Setting the default Supplier and Supplier price on the line, - Loading the Payments tab data.	⩗	9.49.0
Create invoice for sales order with cancelled linked purchase order	Earlier, when you had cancelled a purchase order that was linked to a sales order, you could not create a sales invoice for that sales order. This has now been fixed.	⩗	9.39.0
Item description not displayed in Create purchase orders window	Earlier, item description in the Create purchase orders (PO505000) window sometimes disappeared by itself. This has now been fixed.	⩗	8.95.0
Issue created for released shipment and invoice	Earlier, in some circumstances, no issue was created after releasing a shipment and the invoice. This has now been fixed.	⩗	9.51.0
The customer appears multiple times in the customer list	Earlier, if a customer had more than one location registered, the customer appeared multiple times in the customer list (AR3030PL). This has now been fixed.	⩗	
Improved control of items in the sales and purchase process	You can now use the item statuses No sales and No purchases in a better way to better control items in the sales and purchase process. - In the Sales orders (SO301000) window, items with the 'No sales' status can not be sold. You can, however, use items with the 'No sales' status in sales order lines with the 'Receipt' operation. - In the Purchase orders (PO301000) window, items with the 'No purchases' status can not be purchased. You can, however, create purchase receipts and purchase returns for items with the 'No purchases' status.	⚡	9.44.0
Changes regarding sales orders connected to a purchase order or drop-shipment	For sales orders connected to a purchase order or drop-shipment, the following changes have been done: -If you want to delete an item in the sales order, you will receive a warning that the line is connected to a purchase order. In the connected purchase order, you will receive an error message that tells you to delete the corresponding item. -If you want to delete an item in a sales order that is connected to a purchase order that has a purchase receipt, you will not be able to delete the item in the sales order. -If you want to delete an item in the purchase order, you will receive a warning that the line is connected to a sales order. -If you decrease the quantity of an item in the purchase order, the link to the corresponding sales order line remains. On the linked sales order, a new line is added with the remaining quantity. This new line can be linked to a new purchase order.	⚡	9.35.0
Multilingual support	Multi-language is now supported across the whole system. This functionality is set up via the System locales (SM200550) window using the Set up languages button. Define a default language and you can apply a localised description in multiple places in the system, like in Stock items and Non-stock items for example. These will again be used based on document language defined on customer/supplier.	⚡	8.26.0 (8.26.0 8.1036)
Fixed error about missing roles for the new Sales orders window	When you have several tabs open for different companies, for which you have the correct roles for the new Sales orders (SO30100S) window, you no longer get an error about missing roles when you refresh or reopen the new Sales orders window.	⬤	
Purchase receipt with discount and partially invoiced amount resulting to wrong calculation in Purchase receipt accrual summary	Purchase receipt with discount and partially invoiced amount resulted to wrong calculation in the Purchase receipt accrual summary (PO630500) report. This has now been fixed.	⬤	9.81.0

Error when changing customer on sales order	Earlier, when trying to change the customer on a sales order (SO303000), you got an error message saying "Unable to cast object of type 'BAccountR' to type 'PX.Objects.CR.BAccountR'." This has now been fixed.	🔲	9.81.0
Group discounts subtracted from Order total on quotes	For orders of the QT type, the Order total no longer fails to subtract group discounts.	🔲	9.83.0
Adding purchase order to purchase receipt showing purchase order with 0 amount	Earlier, adding a purchase order to a purchase receipt (PO302000) showed the purchase order with 0 amount. This has now been fixed.	🔲	9.81.0
Selected lines remain selected when clearing filter in Create purchase orders window	In the Create purchase orders (PO505000) window, selected lines no longer become deselected when you do the following procedure: 1 filter on a supplier, 2 select the lines you want to process, 3 clear the filter. Selected lines will now remain selected after doing this procedure.	🔲	9.79.0
Previously incorrect sales price for orders created by API	Earlier, for orders using sales price worksheets with effective periods, the POST SalesOrderV1 and POST SalesOrderV2 endpoints used incorrect sales prices. This has now been fixed.	🔲	9.76.0
Add purchase order with 0 quantity in purchase receipt	When you create a purchase receipt and add a purchase order or purchase order line, those with 0 quantity are no longer displayed for lines from released purchase orders.	🔲	9.73.0
Error when preparing invoice from SO301000 after 9.72 version	You no longer get an error containing "cast object type" when you prepare an invoice in the Sales orders (SO301000) window.	🔲	9.73.0
Historical purchase receipt accrual summary values now all in base currency	Earlier, the Historical purchase receipt accrual summary (PO63050S) report would not show all purchase receipt values in the base currency, leading to an incorrect Total. This has now been fixed and all values are in the base currency, regardless of the currency used in individual purchase receipts.	🔲	9.78.0
Discount amount on sales order lines showing incorrect decimal values	Earlier, the discount amount in the Sales orders window showed the wrong decimal value for certain items since it was rounding certain decimal amounts before the total rounding. This has now been fixed.	🔲	9.74.0
VAT taxable total now calculated correctly	Earlier, for some combinations of quantity, amount and discounts, the VAT taxable total was not calculated correctly. This has now been fixed.	🔲	9.74.1
Unsaved changes pop-up when trying out the new version of Sales orders	You no longer get the pop-up warning about unsaved changes when you click 'Try out the new version' in the Sales orders (SO301000) window and do not have any unsaved changes.	🔲	9.70.0
Fixed error when confirming shipment	Earlier, in some circumstances, you could receive an error message about 'OrigSplitLineNbr' when you tried to confirm a shipment in the Shipments (SO302000) window. This has now been fixed.	🔲	9.86.0
Create sales invoice from shipment with negative amount	Earlier, you could not create an invoice from a shipment with a negative amount. This has now been fixed.	🔲	9.69.0
Cancelled purchase order lines showing up again	Earlier, when you cancelled a purchase order line, it popped up in the Create purchase order (PO505000) window again. This has now been fixed.	🔲	9.74.0
Release purchase invoice for purchase receipt without an item	When you release a purchase invoice for a purchase receipt without an item but with a freight cost line, you no longer get an error.	🔲	9.71.0
Accrual subaccount from warehouse segment now filled in on purchase receipt	Earlier, for accrual subaccounts combined from a warehouse segment, the accrual subaccount was not filled in in the Purchase receipts (PO302000) window. This has now been fixed.	🔲	9.73.0
Created by ID for sales order created from quote	The Created by ID for a sales order copied from a quote no longer displays the wrong user.	🔲	9.71.0
Supplier reference on purchase receipt	The Supplier reference field is no longer empty when you open a purchase receipt from the Purchase receipts tab in the Purchase orders (PO301000) window.	🔲	9.71.0
Deleting a sales order connected to a purchase order	Earlier, you were able to delete a sales order even if it had a purchase receipt conneted with it. This has now been fixed and the system will not allow you to delete such a sales order.	🔲	9.74.0

Confirm TR shipment in Shipments window	You no longer receive an error message when you confirm a TR shipment in the Shipments (SO302000) window.	🔲	Main
Incorrectly doubled open order qty in the Purchase orders list window	Earlier, when you copied and pasted a purchase order, the Open order qty in the Purchase orders (PO3010PL) list window was doubled. This has now been fixed.	🔲	9.63.0
Customer contact no longer missing in order confirmation	The customer contact is no longer missing in the ready-to-print document created from the Order confirmation (SO64111S) window.	🔲	9.61.0
Default customer contact added automatically in Sales orders window	Earlier, when you created a new order in the Sales orders (SO301000) window for a customer with a default contact, the Contact field would not be filled in automatically. This has now been fixed.	🔲	9.61.0
Salesperson ID filled in automatically again in Sales orders window	After the version 9.59 release, for salesperson IDs connected to a username, the Salesperson ID field was not filled in automatically in the Sales orders (SO301000) window. This has now been fixed.	🔲	9.60.0
Add item ID to landed cost in Purchase receipts window	Earlier, in the Purchase receipts (PO302000) window, you could not add an item ID to the landed cost code before saving. This has now been fixed.	🔲	9.63.0
Show completed documents in the Sales orders list window displayed correctly in Danish, Finnish, Norwegian, and Swedish	Special characters are no longer replaced by a question mark in the Danish, Finnish, Norwegian, and Swedish translations of the check box Show completed documents in the Sales orders (SO3010PL) list window.	🔲	
Clear 'Invoice separately' check box via import scenario	Earlier, in the Sales orders (SO301000) window, it was not possible to clear the 'Invoice separately' check box via an import scenario. This has now been fixed.	🔲	9.63.0
Discount in Purchase receipt accrual summary report	The Purchase receipt accrual summary (PO630500) report now calculates discount correctly.	🔲	9.71.0
'Copy line descriptions from sales orders' works properly again	Earlier, when the 'Copy line descriptions from sales orders' check box in the Purchase order preferences (PO101000) window was not selected, and you created a purchase order from a sales order with several lines with the same item ID but different line descriptions, the purchase order would have several lines with the same description, instead of one line. This has now been fixed, so that in this scenario, the purchase order will have one line when the check box is not selected, and all lines with the different descriptions when the check box is selected.	🔲	9.63.0
Restored quantity after deleting purchase order (lines) created from Prepare replenishment	Earlier, when you created a purchase order from the Prepare replenishment (IN508000) window, and then deleted lines in the purchase order or deleted the order, the quantity was not restored in the Prepare replenishment window. This was fixed by turning off a feature toggle for customers on 17.08.2023. The original problem is now solved in this version.	🔲	9.61.0
Alternative description in Purchase orders window	Earlier, the 'Alternative description' for an item was not displayed in the Purchase orders (PO301000) window. This has now been fixed.	🔲	9.71.0
Supplier displayed in purchase receipt when opened from Purchase orders window	Earlier, when you opened a purchase receipt link from the Purchase orders (PO301000) window, the Supplier field was empty. This has now been fixed.	🔲	9.54.0
No missing sales order lines for action "Add order" in Shipments window for orders with multiple shipments. It is now allowed to have multiple shipments open for same sales order	Sales order lines are no longer missing in the 'Add sales order' dialog box in the Shipments (SO302000) window (applies to orders with multiple open shipments(.	🔲	9.63.0
'Customer name' and 'Customer no.' filter in Sales order list window	Earlier, in the Sales order list (SO40101S) window, the filter in the columns 'Customer name' and 'Customer no.' did not work properly. This has now been fixed.	🔲	9.70.0
Data gathering enabled again for the Purchase receipt simulated accrual summary window	Earlier, data gathering from purchase receipt events in the new report window Purchase receipt simulated accrual summary (PO63050S) was disabled during the release of version 9.51, because of an issue where it was not possible to release transfer receipts in the Purchase receipts (PO302000) window. This has now been fixed, and data gathering is enabled again for the Purchase receipt simulated accrual summary window.	🔲	9.54.0

Subaccount from Employee in Sales orders window	Earlier, for order types were the sales subaccount is composed from the employee's subaccount, the subaccount would not be combined correctly in the Sales orders (SO301000) window. This has now been fixed.	🔲	9.52.0
Default supplier in sales order	Earlier, when you changed a line item with a default supplier in a sales order, the supplier would not change automatically to the default supplier of the new item. This has now been fixed.	🔲	9.71.0
Create shipment for orders with Shipping status	Earlier, in the Process orders (SO501000) window, you could not create a shipment for orders with the Shipping status. This has now been fixed.	🔲	9.63.0
Open correct sales order in the Sales order list window	Earlier, in the Sales order list (SO40101S) window, you could not open the correct sales order. This has now been fixed.	🔲	9.51.0
Replacement cost collected from supplier price worksheet in the first place	Earlier, when you used replacement costs in the Sales orders (SO301000) window, the replacement cost would be collected from the item's last cost, when it should have been collected from the supplier price worksheet. This has now been fixed, so that the replacement cost will be collected from the supplier price worksheet. When there is no supplier price found in the supplier price worksheet, the item's last cost is used.	🔲	9.49.0
Several shipments for one sales order	Earlier, it was not possible to create several shipments for one sales order. This has now been fixed.	🔲	9.48.0
Added support for creating multiple shipments for the same sales order	You can now create multiple shipments for one sales order so you can optimise the picking process for multiple employees and offer separate deliveries over time. In the Shipments (SO302000) window, via the 'Add order' button, you can add the sales order lines you want to include in one shipment. After saving, you can add a new shipment and add other lines from the same sales order.	🔲	9.46.0
Purchase receipt accrual details included receipts that had already been invoiced during the same period	When a purchase receipt was invoiced against the same period of the receipt, the report displayed it until the end of that period. Purchase receipt accrual details (PO631000) will no longer include documents back into the report, if there was no remaining balance by the end of the period. Receipts that will be displayed with "To period" filter from earlier periods will only include the receipts from that period, if there was still remaining balance in the document by the end of the chosen period.	🔲	9.39.0
Correct values for Workspace and Document type in Inventory allocation details	Earlier, in the Inventory allocation details (IN402000) window, the columns Workspace and Document type contained incorrect values in some cases. This has now been fixed.	🔲	9.44.0
Purchase receipt accrual summary included receipts that had already been invoiced during the same period	When a purchase receipt was invoiced against the same period of the receipt, the report displayed it until the end of that period. Purchase receipt accrual summary (PO630500) will no longer include documents back into the report, if there was no remaining balance by the end of the period. Receipts that will be displayed with "To period" filter from earlier periods will only include the receipts from that period, if there was still remaining balance in the document by the end of the chosen period. The same behaviour will be included into Purchase receipt accrual details (PO631000) in version 9.39.	🔲	9.38.0
Correct VAT handling when changing customer location on sales order or customer invoice	Earlier, when you changed the customer location on a customer invoice or sales order to a location with a different VAT handling, the VAT category on existing invoice or order lines was not changed. This has now been fixed.	🔲	9.53.0
Improved performance in the Sales orders window and list window	Earlier, opening the Sales orders window and list window (SO301000 and SO3010PL) took a long time when there were many lines. The performance has now been improved, and opening the windows takes 20-50 % less time than before.	🔲	9.53.0
Discounts now work correctly when using import scenarios	Earlier, when importing sales orders via import scenarios, applicable discounts were not filled in automatically. This has now been fixed.	🔲	9.61.0
Correct VAT handling when changing customer on sales order or customer invoice	Earlier, when you changed the customer on a customer invoice or sales order to a customer with a different VAT handling, the VAT category on existing invoice or order lines was not changed. This has now been fixed.	🔲	9.53.0
Improved performance and availability calculation for non-stock kits and stock components in the Sales orders window	Performance and availability calculation for non-stock kits and stock components in the Sales orders (SO301000) window is improved. Additionally, availability calculation for non-stock kits now only takes into account orders that do not have the Hold check box selected.	🔲	9.37.0

Freight amount now calculated correctly when shipment contains items with lot/serial class with issue method User defined.	Freight calculations no longer fail to consider items with a lot/serial class with issue method 'User defined', when shipment freight is based on invoice amount.	🔲	9.39.0
Shipments of the Transfer type are now included in the search results	Shipments created for TR orders will now show up under 'Transactions and registers' when you search in the menu.	🔲	9.32.0
Salesorder status changes to correct Back order status after deleting a shipment	The status of a sales order no longer changes to Open when it should change to Back order when you delete one of several shipments.	🔲	
SalesPrice for customerclass now considered when creating SalesOrder via API endpoint POST SalesOrder V2	Earlier, when you created a SalesOrder via the POST SalesOrder V2 endpoint, the SalesPrice for customerclass was not considered. This has now been fixed.	🔲	9.30.0
Automatic notification sending emails to BCC only	Earlier, automatic notifications only sent emails to BCC. This has now been fixed.	🔲	9.81.0
Webhook 'shipment_changed' notification when shipment is confirmed	Earlier, when a shipment was confirmed, a duplicate webhook 'shipment_changed' notification was created. This has now been fixed.	🔲	9.70.0
External link information on sales order line copied to customer invoice	Earlier, when you prepared an invoice directly from a sales order, the External link column information was missing on the customer invoice. This has now been fixed.	🔲	9.84.0
Restriction groups functionality now works correctly in the Customer locations window	The restriction groups functionality no longer fails to hide restricted customer accounts in the Customer locations (CR303010) window.	🔲	9.27.0
Purchase receipt accrual summary now displays correct 'Amount not yet invoiced' for purchase orders with discount	Earlier, for purchase orders with a discount, the column 'Amount not yet invoiced' in the Purchase receipt accrual summary (PO630500) report would display the full amount without discount. This has now been fixed.	🔲	9.49.0
You can now change the alternative ID in a cross-reference to another supplier with the same alternative ID	Earlier, when you changed the alternative ID in a cross-reference to another supplier with the same alternative ID, an error message would be displayed when you would try to save the purchase receipt. This has now been fixed, but requires you to select 'Do not check alt. item ID on creation of purchase receipt' in the Purchase order preferences (PO101000) window.	🔲	9.26.0
Purchase receipts with several invoices now displayed correctly in Purchase receipt accrual summary	Earlier, for a purchase receipt for which several invoices were created, the Purchase receipt accrual summary (PO630500) report would display the receipt several times, resulting in incorrect amounts. This has now been fixed.	🔲	9.49.0
Fix of invoice rows not included in Sales profitability reports	Previously, the Sales profitability reports (AR671000, AR672000, AR673000, AR674000, AR675000, AR676000) did not include rows for invoices that had no Item ID. This has now been fixed.	🔲	9.23.0
Incorrectly split orders in Create purchase orders window	Earlier, in the Create purchase orders (PO505000) window, a purchase order was sometimes split into two orders even for the same supplier. This has now been fixed.	🔲	9.63.0
Added possibility to skip the alt. item ID check, and improved error message when the alt. item ID check does not let you create a purchase receipt	When you want to create a purchase receipt based on a purchase order, of which an item's alternative item ID has been changed in the meantime, an error message will appear with now more specific information on why creation of the purchase receipt failed.

In addition, the check box "Do not check alt. item ID on creation of purchase receipt" has been added in the Purchase order preferences (PO101000) window, which allows you to create a purchase receipt in the Purchase order (PO301000) window when an item's alternative item ID has been changed. | 🔲 | 9.22.0 |
| Fixed wrong allocation when purchase receipt allocation is added via API | Earlier, when purchase receipt allocation was added via API, the system created an extra allocation line causing wrong allocated quantity. This has now been fixed. | 🔲 | 9.36.0 |
| Discount transferred to purchase receipts created via POST | For purchase receipts created via POST with "linetype" added, discounts are now transferred from the purchase order to the purchase receipt. | 🔲 | 9.77.0 |

Preparing invoice from RM order will no longer mistakenly create invoice with negative amount	Earlier, when you prepared an invoice from an RM order where lines with the Issue operation have a lower price amount than lines with the Receipt operation, a customer invoice with a negative amount would be created. This has now been fixed and a credit note will be created instead.	🔲	9.29.0
VAT category for export type on a customer's location now works correctly	Earlier, when creating a sales invoice or sales order including an item, for a customer location with a different Export type than used for the main location, the system did not provide the correct VAT category. This has now been fixed.	🔲	9.30.0, 9.34.0
Salesorder status changes to correct Back order status after deleting a shipment	The status of a sales order no longer changes to Open when it should change to Back order when you delete one of several shipments.	🔲	9.26.0
Order total for CM orders with group discount now calculated correctly	Earlier, for sales orders of the Credit note (CM) type with applied group-level discount, the Discount total was added to the Order total. This has now been fixed, and the Discount total is deducted from the Order total.	🔲	9.39.0
Restriction groups functionality now works correctly in the Sales order window	The restriction groups functionality no longer fails to hide restricted customer accounts in the Sales orders (SO301000) window, when you create a new sales order.	🔲	9.20.0
Quantity on orders of the CS type now works correctly for items with lot/serial class and FIFO	Earlier, for items with an assigned lot/serial class and the FIFO valuation method, you could not adjust the quantity on a sales order of the CS type according to the item's available quantity. This has now been fixed.	🔲	9.25.0
City set incorrectly in shipping address in sales order	The City added for the shipping address in the sales order was set incorrectly when in the shipping address on the customer, the City was manually set/added. This has now been fixed.	🔲	Not Planned
The order does not contain any items planned for shipment	After release 9.9.0.1004 there was an error regarding orders did not contain any items planned for shipment. This has now been fixed	🔲	9.12.0
Error in currency conversion when converting a quotation to a sales order	Earlier, there was a bug when you converted a quotation to a sales order and you had a currency configured in Visma.net ERP. This was calculated wrong when the conversion was done. This has now been fixed.	🔲	9.21.0
Error in releasing landed costs with stock and not-stock items	There was an error when adding landed cost in the Purchase invoice (AP301000) window and when having a non-stock item and a stock item in the connected sales order. When releasing, there was an error message on missing purchase receipt. This has now been fixed.	🔲	9.37.0
Freight amount now calculated correctly when shipment contains items with lot/serial class with issue method User defined.	Freight calculations no longer fail to consider items with a lot/serial class with issue method 'User defined', when shipment freight is based on invoice amount.	🔲	9.30.0

Issues with sales order created via v2 API endpoint	In version 9.05, a new dynamic feature toggle functionality was introduced to set the standard quantity on Sales orders (SO301000) and Sales invoices (AR301000) lines to 1 instead of 0. This led to an issue for sales orders created via the API v2 endpoint, as it became not possible to create shipments for these orders. The dynamic feature was deactivated to ensure all new sales orders created via API v2 did not have this issue, but the sales orders created during the first 22 hours of the 9.05 version still had this issue. This patch will fix this issue for these sales orders. Supported for affected sales orders: - Create shipment from the Sales orders (SO301000) window. - Create shipment for sales orders via the API endpoint: /v1/salesorder/{saleOrderNumber}/action/createShipment. Not supported for affected sales orders: - Connect sales orders to new shipments from the Shipments (SO302000) window - Attach sales orders to shipments via API Shipment POST or PUT endpoints. - Create shipments via the Process orders (SO501000) window. Please note that the Sort order for sales order lines corrected via this code may in some scenarios be affected. Supported: - Create shipment for Sales Order window (SO301000) for the sales order affected. - Create shipment for Sales Order via API endpoint: /v1/salesorder/{saleOrderNumber}/action/createShipment Not supported: - Connect Sales Orders to a new shipment from Shipment window (SO302000) - Attach Sales Orders with issues to shipment via API Shipment POST or PUT endpoints. - Create shipments for the orders affected via the Process order window (SO501000).	🟧	9.05.1
Not possible to create a shipment for a partly shipped sales order in the Process orders window	Earlier, in the Process orders (SO501000) window, it was not possible to create a shipment for a partly shipped sales order. This has now been fixed.	🟧	9.06.0
'Copy line notes from sales orders' now works independently from 'Copy line descriptions from sales orders'	Earlier, in the Purchase order preferences (PO101000) window, the setting 'Copy line notes from sales orders' was only available when you selected the setting 'Copy line descriptions from sales orders'. This has now been changed so that you can select the setting 'Copy line notes from sales orders' also when 'Copy line descriptions from sales orders' is not selected.	🟧	9.55.0
Inline search for entities containing special characters could show ASCII codes in the result set	Earlier, inline search for a customer, supplier, item, account and other entities containing special characters, could in some scenarios display ASCII codes in the result set. For example, if an item description contains the character ", this could result in the display of ASCII codes in the lookup table. This has now been fixed.	🟧	9.06.0
Cannot open the Customers window from the Sales orders window	Earlier, when you clicked the Edit button to the right of the Customer field in the Sales orders (SO301000) window, the Customers (AR303000) window did not open. This has now been fixed.	🟧	9.00.0
Total cost for a sales order based on replacement costs is now calculated correctly after changing a line item	Earlier, when 'Use replacement cost for margin/profit' was selected in the Sales orders (SO301000) window, the Total cost was not calculated correctly after changing a stock item on a sales order line. This has now been fixed, and the total cost for an order is calculated correctly based on the sales order lines' replacement costs, also after changing the stock item on a sales order line.	🟧	9.47.0
Shipment set to correct status after connected invoice is deleted	Previously, in certain scenarios, the status of a shipment remained in the Invoiced status eventhough the connected invoice was deleted, this has now been fixed so that it is possible to generate a new invoice for the shipment.	🟧	9.08.0
Search and filter with supplier and supplier location in Create purchase orders window	Earlier, there was an error when searching and filtering with supplier and supplier location in the Create purchase orders (PO505000) window. This has now been fixed.	🟧	8.98.0
Allocations not returned from GET PurchaseReceipt	Earlier, allocations were not displayed correctly when you made a call for GET Purchase receipt. This has now been fixed.	🟧	8.95.0
Unable to create shipments for RR orders	Earlier, in some circumstances, it was not possible to create shipments for RR orders. This has now been fixed.	🟧	8.92.0

Manual amount now copied to credit note when using Correct invoice in the Sales invoices window	The credit note created after using the Correct invoice functionality in the Sales invoices (AR301000) window, no longer fails to copy any manual amounts on the original invoice.	🔲	9.23.0
Shipment confirmation process sets shipments in status Confirmed even if the process failed	Earlier, the shipment confirmation process sometimes set shipments in the Confirmed status, even though the process failed. This has now been fixed.	🔲	8.90.0
Wrong currency type when copying from Quote to Sales order	Earlier, the system set the wrong currency type when copying from Quote to Sales order in the Sales orders (SO301000) window. This has now been fixed.	🔲	8.87.0
Wrong cost used on receipts when creating partial receipt	For partial receipts for a purchase order (PO301000), the extented cost amount was retrieved from the purchase order with the total amount, and the new amount was not calculated. This has now been fixed.	🔲	
Skipped and deleted discounts applied on sales invoices	Earlier, in the Customer invoice (SO303000) window, when you opened an invoice you had prepared in the Sales orders window, the invoice balance was not what the order total was. This happened when you had applied a discount on the customer and then clicked Skip discount or deleted the discount. The deleted discount remained on the invoice. This has now been fixed and deleted/skipped discounts aren't applied on the invoice.	🔲	8.81.0
Delivery address not inherited from customer location	Earlier, in some rare scenarios when creating a sales order, the system inherited a no longer valid delivery address from the customer location. This has now been resolved.	🔲	8.85.0
Print shipment confirmation for transfer order	Earlier, in the Shipments (SO302000) window, you could not print the shipment confirmation for transfer orders. This has now been fixed.	🔲	9.63.0
Supplier information missing in Sales orders (SO301000) window	Earlier, when you created a sales order with a stock item that had a default supplier defined, the supplier information was not retrieved to the order. This has now been fixed and supplier information (name and ID) is displayed for items with a default supplier.	🔲	8.85.0
Slow performance when opening a document from list windows (screen ID postfix PL)	Earlier, you could experience slow performance when opening a document from any list window (screen ID with postfix PL). This result depended on the total number of documents of the specific type in the company, and if the generic inquiry used for the specific list window had defined any aggregates. This has now been resolved in a generic way, so that the opening of documents is much faster throughout the entire system.	🔲	8.82.0
Registering a sales order without an item ID	Earlier, when trying to register a sales order (SO301000) without an item ID, you got an error message: Cannot insert the value NULL into column 'LineType', table 'ERP_FI_REAL_0016.dbo.SOLine'; column does not allow nulls. INSERT fails. The statement has been terminated. This has now been fixed.	🔲	8.79.0
Sales order lines wrongfully marked as Completed	Earlier, in certain scenarios, sales order lines were wrongfully marked as Completed in the Sales orders (SO301000) window. This has now been fixed.	🔲	8.97.0
Error message on inactive supplier on sales to purchase	Earlier, the Create purchase orders (PO505000) window crashed, if there was an inactive supplier on the connected sales order. This has now been fixed and the system displays an error message on an inactive supplier, if there is one.	🔲	8.80.0
VAT category for export type on a customer's location not working correctly	Earlier, when creating a sales invoice or sales order including an item, for a customer location with a different Export type than used for the main location, the system did not provide the correct VAT category. This has now been fixed.	🔲	9.06.0
Check box 'Print note on purchase orders' in the Organisations window now works correctly	Earlier, when you selected the check box 'Print note on purchase orders' in the Organisations (CS101500) window, the check box 'Print notes' in the Purchase orders (PO301000) window was not automatically selected. This has now been fixed.	🔲	9.32.0
Shipment confirmation process sometimes leaves shipments in status Confirmed even if the process failed	Earlier, the shipment confirmation process has sometimes left shipments in "Confirmed" status even though the process failed. This has now been fixed.	🔲	8.75.0
Drop-shipment sales order and change of delivery date on purchase order	Change of delivery date in purchase orders (drop-shipment) will now update the ship on date in Sales orders for all rows.	🔲	8.80.0

Error when trying to copy a quote to an order	Earlier, you sometimes got the following error when trying to copy a quote to an order in the Sales orders (SO301000) window: Error: Cannot insert the value NULL into column 'CreatedByID'. This has now been fixed.	🔲	8.81.0
Email shipment action in Shipments window now works properly	Earlier, it was not possible to email a shipment confirmation from the Shipments (SO302000) window. This has now been fixed.	🔲	9.37.0
Possible to ship from warehouse location not allowing sales	Earlier, when an item had quantity in two warehouse locations, one location allowing sales and the other not allowing sales, you were able to set a shipment to the non-sales location and confirm it, thus issuing out quantity from the non-sales location. This has now been fixed so that if a non-sales warehouse location is selected on a shipment, you will get an error.	🔲	8.66.0
RC orders with items with serial numbers giving an allocation error message	Earlier, RC orders that contained items with serial number tracking gave an error message stating "Nothing to allocate". This has now been fixed and the correct allocation is being made.	🔲	8.73.0
Trace transactions in Create purchase orders (PO505000) window	In audit trail, it is now possible to trace transactions in the Create purchase orders (PO505000) window. The table name is InItemPlan. The plan ID can now be seen on sales order and purchase order. It is also tracked in the Create purchase orders (PO505000) window for the audit trail.	🔲	8.78.0
"Use last cost if there is no available stock" not working for kit items	Earlier, the "Use last cost if there is no available stock" option in the Sales order preferences (SO101000) window did not work for kit items. This has now been fixed.	🔲	8.81.0
Unable to "Prepare invoice" after adding a non-stock item to a reopened sales order	Earlier, when adding a non-stock item to a sales order that had been reopened in the Sales order (SO301000) window, you were not able to take action "Prepare invoice" on that sales order. This has now been fixed.	🔲	8.71.0
Performance improvement in Create purchase order window	There are several fixes in the performance of the Create purchase order (PO505000) window. There is a new check box "Show details". If you select it, supplier prices, currency ID, weight, and volume will be shown. Check box for "Exclude lines without supplier" will be selected by default when opening the window. If you uncheck it, all rows with no supplier will be shown together with the rows with a supplier.	🔲	8.86.0
Emailing same shipment several times from Process shipment window	Earlier, the shipment was still visible after emailing process in the Process shipments (SO503000) window, so it could get emailed several times from this window. This has now been fixed.	🔲	8.65.0
Shipment for kit items with no items in stock but "Allow negative quantity" checked	Earlier, when creating shipments for kits where one or more of the subitems did not have stock, the system produced an error message, even if "Allow negative quantity" was checked on the item class. This required manual input and would in some cases cause negative stock in wrong locations. This has now been fixed.	🔲	8.72.0
Splitting of landed costs	Earlier, there was an issue with splitting of landed costs on landed cost invoices (AP301000). It has now been fixed.	🔲	8.54.0
No access to File maintenance for Sales User, Sales Administrator, Purchase User, Purchase Administrator, Warehouse User, or Warehouse Administrator	Earlier, you were not able to delete or maintain any attachments in the File maintenance (SM202510) window if you only had the Sales User, Sales Administrator, Purchase User, Warehouse User, or Warehouse Administrator roles. This has now been fixed.	🔲	8.51.0
Rounding error for VAT taxable and VAT exempt totals in Sales orders window	Previously, in certain scenarios where an order contained discount, the roundings done for the VAT taxable and VAT exempt totals in the Sales orders (SO301000) window were incorrect. When an invoice was created for the order, the same rounding issue occured on the invoice, which led to the invoice ending in an error state when sent as e-invoice in Peppol format. This has now been fixed.	🔲	8.96.0
Correct account when changing reason code on purchase return	Earlier, when you changed the reason code on a purchase return, and the new reason code had a different account set, the wrong account would be displayed in the journal transactions. This has now been fixed.	🔲	9.75.0
Fix of net sales amount and additional table selection in Sales profitability reports	Previously, the Sales profitability reports (AR671000, AR672000, AR673000, AR674000, AR675000, AR676000) showed the Net sales amount incorrectly when the invoice contained a header discount. This has now been fixed. In addition, there is now the possibility to select fields from the SOLine table in the reports. With this, you are able to set that the cost is taken from the connected sales order line, instead of the invoice line.	🔲	9.21.0

Not possible to prepare an invoice and credit note for an RM order from the Process shipments window	Earlier, it was not possible to create the correct invoice and credit note for an RM/RL order from the Process shipments (SO503000) window. This has now been fixed.	🔴	8.94.0
Error when printing a report twice after using the back button in the browser	Earlier, when you printed documents using the print function under the Reports menu from any window in the system, you could get an error-message if you clicked the back button in your browser and tried to re-print the same document. This has now been fixed.	🔴	8.45.0
Only first kit component printed on picking list for non-stock kit and kit component with two stock items	Earlier, in case of a non-stock kit and kit component with two stock items, only the first kit component was printed on the picking list (SO644000). This has now been fixed.	🔴	8.54.0
Wrong cost price when updating a purchase return	Earlier, when you updated a receipt of a purchase order return in the Purchase receipts (PO302000) window, the cost price of the return was not used on the receipt. This has now been fixed and the cost price is the same in the issues as in the purchase return.	🔴	
Error when assemble KIT from sales order screen	Assembling KIT items containing components with lot/serial tracking directly from the sales order screen (SO30100) led to an error. This has now been fixed.	🔴	8.58.0
Wrong taxable amount on orders with order type Credit not when using amount based discounts	Earlier, there were wrong taxable amounts on orders with the order type Credit note when using a discount based on amount. This has now been fixed.	🔴	8.55.0
Changes in order type and reason code for Finnish template	In the default settings for new Finnish companies, the description for reason code 03 has been changed to better reflect its purpose. Also, the order type 'ME' has been added, which can be used in transactions related to Project accounting.	🔴	8.40.0
Releasing landed cost after moving invoice to next period	Earlier, if the financial period was closed and a purchase invoice with landed cost was moved to the next period (AP50700S), you received an error message and could not go further. This has now been fixed.	🔴	8.96.0
Report Sales order details by stock item not showing correct order lines when "Incomplete lines only" active.	Earlier, the report Sales order details by stock item (SO611500) did not show correct order lines when "Incomplete lines only" was activated. This has now been fixed.	🔴	8.65.0
Improved transaction handling when confirming a shipment	Earlier, you could experience that the sales order status was not correctly updated when confirming a related shipment from the Shipments window (SO302000). This has now been fixed.	🔴	8.40.0
Partially delivered sales orders based on drop shipments remain in status open	Earlier, when you partially delivered a sales order via drop shipment receipt, the sales order remained in status open. This has now been corrected so that you will get the status backordered instead, regardless of the selected shipment rules. Once the sales order is completely delivered, either via normal shipments or drop shipments, it will get the status complete.	🔴	8.32.0
Subaccount disappears when adding a stock item	In the 8.31 release was introduced a new bug when the case ~~SIGMA-59051~~ was fixed: The subaccounts used on a sales order line were not loaded automatically anymore. The fastest solution to fix this was to roll back the fix for ~~SIGMA-59051~~. Now subaccounts are automatically loaded on sales order lines again.	🔴	8.31.1
Cannot create a shipment when items are not in stock	Earlier, when you created a shipment from a sales order with items that were not in stock, and you had enabled the settings "Add zero lines for items which are not in stock" and "Create zero shipments" in the Sales order preferences (SO101000) window, the shipment could not be created. The system gave the error: "Shipment can not be shipped in full". This has now been fixed, and the shipment can be created as intended.	🔴	8.43.0
Error when adding lines to a TR order	Earlier, when the "Default customer class ID" field in the Customer ledger preferences window was empty, the user got an error when adding lines to a TR order. This has now been fixed.	🔴	8.30.0
Already invoiced PO receipts showed up on purchase invoice	In some scenarios, when adding purchase receipts (PO302000) to purchase invoice (AP301000), also the already invoiced receipts were showing up in the list to be selected. This has now been fixed.	🔴	8.35.0

System using wrong sales account on sales order depending on order type	There were different scenarios when creating a sales order with item or without item. - In scenario 1 when using customer location, sales account was set from posting class or customer location. - In scenario 2 when using posting class, sales account was set from posting class or customer location. - In scenario 3 when using warehouse, sales account was set from posting class or customer location. - In scenario 4 when using reason code, sales account was set from posting class or customer location. Now the sales order lines have been fixed to match the right sales accounts.	🔲	8.90.0
Wrong discount amount when creating an invoice for 2 orders	Earlier, when an invoice for 2 orders was created, where one of the orders contained a document discount and the other one had skipped document discount, the discount amount in the invoice was wrong. This has now been fixed.	🔲	8.32.0
Cannot load the default email template when sending the sales order from a popup window	Earlier, when you wanted to send a printed sales order by email from the Sales orders window (SO301000) opened from a popup window, the default email template was not loaded. This has now been fixed.	🔲	8.40.0
Wrong amount on invoice when using manual discount and premium freight	In previous versions of Visma.net ERP, when a sales order contained a manual document discount and premium freight was used, the amount on connected invoices became wrong. This has now been fixed.	🔲	8.28.0
Not possible to rearrange the sales order lines	Earlier, it was not possible to rearrange the sales order lines. This resulted in missing lines on the order confirmation report. This has now been fixed, and historical data affected by this issue have also been resolved.	🔲	8.26.1 (8.26.0 8.1039)
Series ID of the Discount is not automatically updated	In version 8.26 of Visma.net ERP, a bug was introduced where the Series ID of the Discount was not updated automatically when the Discount ID was added manually into a Sales order. This is has now been fixed.	🔲	8.26.1 (8.26.0 8.1039)
Incorrect account is used when crediting from an RC order	Earlier, there was an issue were the account in the credit note for the supplier, was taken from the accrual account of the purchase order. This has now been fixed, so that the system takes the account from the sales account on the sales invoice when crediting from an RC order.	🔲	8.44.0
Shipments confirmation is not done properly	After version 8.26 of Visma.net ERP, there has been several situations where the shipment confirmation was not done properly. In the end, this will affect the status of the order by keeping it in status "Shipping". This has now been fixed, so that the system runs the entire shipment confirmation in one transaction.	🔲	8.28.0
The cost on invoice lines is not always based on the cost of the connected inventory transaction	Earlier, the cost on invoice lines was not always based on the cost of the connected inventory transaction. This has now been fixed.	🔲	8.26.0 (8.26.0 8.1036)
The profitability analysis inquiry fails when using alphanumeric item IDs	Earlier, if you selected an item with an alphanumeric ID in the Sales profitability analysis (AR409000) inquiry window, the inquiry failed with a conversion error. This has now been fixed, so that you are able to use alphanumeric item IDs in this inquiry window.	🔲	8.38.0
Change supplier in the Create purchase orders window	Earlier, when you created a purchase order based on a sales order using the "Create purchase orders" window, you were not able to change the supplier on the order lines. This has now been fixed.	🔲	8.26.0 (8.26.0 8.1036), 8.25.3 (8.25.4 9.1020)
Error when releasing a customer invoice if the entire stock was shipped	In the 8.25 version of Visma.net ERP, we had a bug which gave an error when releasing a customer invoice if the entire stock was shipped. Due to this error, the inventory transaction was created but could not be released automatically. This has now been fixed.	🔲	8.25.1 (8.25.4 9.1015)
Releasing shipment with 0 quantity non-stock kit	Earlier, you could not release a shipment containing a non-stock kit with a zero quantity. This has now been fixed.	🔲	9.75.0
You can now search for TR orders in the Sales orders list window	Earlier, it was not possible to search for TR orders in the search field in the Sales orders (SO3010PL) list window. This has now been fixed.	🔲	9.23.0
Wrong description on pick list from shipment SO302000	Earlier, there was a wrong description on pick lists from the Shipments (SO302000) window. This has now been fixed.	🔲	8.75.0

Add purchase receipt line with Unit cost 0 to purchase invoice	Earlier, there was an issue in the Purchase invoices (AP301000) window that prevented you from selecting lines with 0 Unit cost through the Add purchase order receipt line button. This has now been fixed.	🔲	8.26.0 (8.26.0 8.1036)
Discount lost on sales order invoices	Earlier, when the sales order invoice amount was changed and exceeded the limit set on the customer, the discount code on the line was deleted automatically when saving the changes. This has now been fixed.	🔲	8.26.0 (8.26.0 8.1036)
Copying a customer includes values from the "Other invoice settings" tab	Earlier, when you used the copy function in the Customers window (AR303000) and pasted the information to a new customer, the values in the "Other invoice settings" tab was also copied. This caused that electronic invoices were sent to the wrong customer. This has now been fixed, and the copy function will now exclude the values in the "Other invoice settings" tab.	🔲	8.26.0 (8.26.0 8.1036)
Pick list email subject line corrected	When you send a pick list by email from the Pick list (SO644000) report, the subject line will no longer contain 'Invoice'. The subject line now starts with 'Pick list from'.	🔲	9.78.0
Items on emailed purchase orders now included in 'Qty. on purchase orders'	Earlier, items on emailed purchase orders were not included in the 'Qty. on purchase orders' column in the 'Add item' dialog box for other purchase orders. This has now been fixed.	🔲	9.38.0
The "Line discount basis" setting is ignored in sales orders	Earlier, the "Line discount basis" setting from the Customer ledger preferences window, was ignored when creating a sales order. This has now been fixed.	🔲	8.25 (20090 8)
Wrong discountable amount on the invoice	Earlier, the system gave wrong discountable amount on the invoice when multiple sales orders were shipped into one shipment. This has now been fixed.	🔲	Future Versio ns
Wrong document discount on credit note/return for credit	Earlier, when creating a credit note/return for credit from a specific invoice, the document discount was wrongly calculated. This has now been fixed.	🔲	8.26.0 (8.26.0 8.1036)
Discount not set for sales order copied from another order	In the previous version, when you copied a sales order with a discount to a new order by using Actions - Copy order, the discount was not set in the new sales order. This has now been fixed.	🔲	8.25 (20090 8)
Inventory transaction cannot not be released if there is not enough stock for the item	In earlier versions, you were able release the invoices for IN type sales orders and the stock was updated, even if the stock balance of the item was 0 in the location and the "Allow negative qty" option was not selected. This has now been fixed.	🔲	8.25 (20090 8)
External link cannot be imported to a sales order	Earlier, when importing lines to a sales order, the External link column could not be mapped and imported. This has now been fixed.	🔲	8.29.0
Default location is not set on shipment	Earlier, when an item was in stock in multiple locations, the system looked at the first location where there was an available stock and used that location on the shipment line. From now on, the default location will be set on the shipment line if there is an available stock for the item. If there is no availability, the system will use the location with the highest priority that has an available stock.	🔲	8.25 (20090 8)
The system is picking the wrong supplier when creating a purchase order from a sales order	Earlier, when you created a purchase order based on the sales order, using the "Create purchase orders" window, the system always used the default supplier set on the item, not the one set on the sales order line. This happened even if you changed the supplier on the sales order line. This has now been fixed, so that the selected supplier on the sales order line will be picked automatically when the purchase order is created.	🔲	8.25 (20090 8)
Save allocation lines for PurchaseReceipt using LOT /SERIAL class "When received"	When creating a purchase receipt from a purchase order with a serial class that has allocation assignment "when received", you are now able to save its allocation lines.	🔲	8.25 (20090 8)
Cannot link order line to drop-shipment	Earlier, when a drop-ship line on a sales order was connected to a purchase order, and the checkbox "Mark for purchase order" was deselected and then selected again, you were not able to select "Drop-ship" in the "Purchase order source" field. This has now been fixed.	🔲	8.25 (20090 8)

Discount code disappears when changing the date on a sales order	Earlier, the discount code from the sales order lines was removed when the date was changed. This has now been fixed.	🟧	8.23 (200609)
Change of supplier on a purchase order after release of its receipt	In the Purchase orders (PO301000) window, if there is a purchase receipt for the purchase order, you are not able to change its supplier.	🟧	8.25 (200908)
Both the account and the subaccount fields become empty when changing the warehouse on an RC (return for credit) order line	In the previous version of Visma.net ERP, both the account and the subaccount fields became empty, when changing the warehouse on an RC (return for credit) order line. This has now been fixed.	🟧	8.25 (200908)
Wrong order status when cancelling a reminder	In earlier versions, when the "Shipping rule" field on a sales order was set to "Cancel reminder", the sales order got the status "Back ordered", if you deleted a line from the connected shipment. We have now improved the logic for this scenario, so that the sales order will get the status "Completed" instead.	🟧	F202005
Wrong net amount on credit note with order discount	In the Sales orders (SO301000) window, in some scenarios a credit note created from an invoice with an order discount could end up with a wrong net amount. This has now been fixed.	🟧	8.25 (200908)
Location is set as <Split> on shipment that allows negative quantity	The system will now pick the the location automatically when the stock availability is 0 and negative stock is allowed. 1. If the warehouse on the shipment is the same as the default warehouse set on the item, use default location set on the item 2. If the warehouse on the shipment is not the same as the default warehouse on item, use default shipping location set on the warehouse. 3. If the warehouse on the shipment is not the same as the default warehouse on item and the Warehouse has no Shipping location, set <Split> in the Location field.	🟧	8.22 (200526 Release)
Wrong split of locations in Inventory summary	Previously, when you manually selected a location on a shipment without setting manual allocation, the system pre-allocated the entire quantity automatically based on location priority. Now the entire line quantity is pre-allocated based on the location set on the shipment line.	🟧	F202005
Shipped weight and Shipped volume are empty on the shipment	Earlier, the values for Shipped weight and Shipped volume became empty on the shipment, when a stock item were using a lot/serial class with the Assigning method "When used". This has now been fixed, so that both values are displayed correctly on the shipment.	🟧	8.25 (200908)
Print shipment confirmation in Process shipments window for shipments with status Confirmed	Earlier, in the Process shipments (SO503000) window, you could not print shipment confirmations for shipments with the Confirmed status. This has now been fixed.	🟧	9.66.0
Item from deleted PO not set back to Create purchase orders	The issue where items from deleted purchase orders were not transferred back to the Create purchase orders (PO505000) window as available items to process has now been fixed.	🟧	8.25 (200908)
Assign allocations to purchase order receipts created from a replenishment	In earlier versions, there was an issue with assigning allocations to purchase order receipts created from a replenishment. It has now been fixed.	🟧	8.24 (200623)
The reports Sales order details by stock item (SO611500) and Sales history by items (SO40102S) do not show the same quantity	Earlier, the report Sales history by items (SO40102S) did not include the returned qty/amounts from CM orders. This has now been fixed.	🟧	8.22 (200526 Release)
A report for total sales per item that includes non-stock items	The Sales history by items (SO40102S) report, will interpret a sales order line as completed - if the document is completed. The inquiry will now also show sales numbers for non-stock items in addition to stock items.	🟧	8.22 (200526 Release)

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Accounting Core

Release Notes.	Documentation	T	Ret versi
VAT report type "Weekly" removed from the list for VAT periods and tax agencies	The option Weekly is removed from the report types for VAT periods in the VAT periods (TX207000) and Suppliers (AP303000) windows in the Tax agency settings tab. It's not been used by any companies and after the changes to allow changing VAT periods in the active year, Weekly was not included in the calculation of the change.	☑	9.79.0
New message in SAF-T report window for saving changes in Subaccounts tab	When you make changes in the Subaccounts tab in the SAF-T report (TX50600S) window, a message will now be displayed prompting you to save the changes before you send or download the report.	☑	9.84.0
The TaxAuthority tag in the SAF-T Report file now country-specific	The SAF-T file (TX50600S) is changed when it is reported for another country than Norway. This is for the tag <TaxAuthority> that will have the following values depending on the company country: Norway - Skatteetaten Denmark - Skat Sweden - Skatteverket Finland - Verohallinto Netherland - Belastingdienst	☑	9.68.0
Selected column and Totals for the selected values removed from VAT account control summary and details	The Selected column and the Totals for the selected values are removed from the VAT account control summary and details (TX40300S and TX40400S) windows. The Totals in the heading are now calculated based on the filtering in the heading and in the filtered lines.	☑	9.71.0
New error message when trying to release a recurring transaction in Recurring transactions or Generate recurring transactions on a Module control account	The error message when trying to release a recurring transaction in the windows Recurring transactions (GL203500) or Generate recurring transactions (GL504000) on a Module control account. The new message is as follow: Error: An error occurred during processing of the field Account value (AccountID) GL Error: The usage of account (Account) in GL transactions is restricted. To allow GL postings on this account please go to GL202500-Chart of accounts and tick the checkbox in the 'Allow manual entry' column for this account. The previous message said that it was not a Module control account and you had to set it or change to use a Module control account, which was a wrong message.	☑	9.58.0
Collection of amount for Released and Unreleased amount for each VAT period improved	The collection of amount for the Released and Unreleased amount for each VAT period has (TX207000) been improved.	☑	9.70.0
Performance of Account summary improved	The performance of the Account summary (GL401000) window has been improved.	☑	9.64.0
Trial balance and Control module account handling	The Trial balance (GL303010) window will give an error if it contains or will process any accounts where a control module account is set and the Allow manual entry option is not set. You have to set Allow manual entry option on all control module accounts to be able to release a trial balance.	☑	9.50.0
Control module accounts and SIE imports	Using the SIE Import (GL40101S) window will give an error if the SIE file contains or will process any accounts where Control module account is set and the Allow manual entry option is not set. You have to set Allow manual entry option on all Control module accounts to be able to import a SIE file with transactions on accounts where the Allow manual entry option is not set.	☑	9.50.0

Performance and other improvements in the Tax account control details window	Several fixes have been done in the VAT account control detail (TX40400S) window When opening the window for the second time, the selections done when it was opened the last time were kept. This caused the opening of the window to take a long time and it also to get the selected data again. This is changed so that only the company and branch are filled in when opening the window. Performance improvements: - Pagination and Field scope are implemented - All calculation on the lines are moved to the SQL server The calculation of the summary in the heading has been changed so that it also includes the filtering on the lines. So you will get the summary of the rows in the window for all pages. The selection column and calculation of selected has been removed. This function cannot be used together with pagination improvement and it only worked on one page at the time.	☑	9.65.0
Performance improvement on Voucher details inquiry (GL40601S)	The performance on Voucher details inquiry (GL40601S) was improved by adding pagination to the window.	☑	9.48.0
Enter both From and To account in General ledger transactions with VAT	There are changes in General ledger transactions with VAT (TX40500S) for From and To account. If you enter a value in one of these columns, you have to enter value in the other one as well. You will get an warning in the column that is empty. This is done to improve performance since it worked as either From account and all others with a higher number or To account and all others with a lower number.	☑	9.79.0
ARM reports updated to use new GetOrganization() functions	All column sets for General ledger reports are updated with new formulas for Company name/Branch name and Corporate ID, depending on activation of filters for Company and from and to Branch. This change will only apply to new companies. Also, if you have multi-branch activated, you have to make these changes manually on the column set you are using. The formulas are described in the release notes for version 9.05. If there are no company/branch filters, then from active company: Company name Corporate ID If there is a company filter, then from selected company: Company name Corporate ID If there is a company and From branch filter: Company name Branch name Corporate ID from branch If there is a company and from and to branch filter: Company name Branch ID From - To Corporate ID from company If there is a From branch filter: Company name Branch name Corporate ID from branch If there is a From and To branch filter: Company name Branch ID From - To Corporate ID N/A	☑	9.07.0
Suggest tax agency in Prepare VAT report and Process VAT report windows	In the Prepare VAT report (TX501000) and Process VAT report (TX502000) windows, the tax agency is now suggested when the window is opening. The tax agency that is selected is the first in the lookup so if you have more than one tax supplier in a multi-branch company, it will select the same for all companies/branches.	☑	8.97.0

Improvements in VAT account control details and General ledger transactions with VAT windows	There are changes in the VAT account control details (TX40400S) and General ledger transactions with VAT (TX40500S) windows. They are now using the same procedure to get the data and that should improve the performance of the VAT account control details window since it used a other method to get the data. Note! In the General ledger transactions with VAT the check box to show unposted transactions has been changed to behave the same as other windows and is now named "Include unposted transactions". The result when checking this is that released not posted and balanced batches will be included in the data. Note! In VAT account control details the behaviour has been changed and From and To period are mandatory. So, now it will not start getting transactions before these columns are filled out. In addition, if you do not select a reporting period, the Include transactions without VAT period option is disabled and you will always get all transactions unless you select a report period. Then only transactions having the selected report period will show and you have to check the Include transactions without VAT period option to get the transactions without VAT period.	☑	9.39.0
New VAT related windows added to the menu	To improve the VAT reconciliation, new windows have been added to the menu for VAT handling and control: - VAT - Inquiries General ledger transactions with VAT (TX40500S) New in all countries exempt Norway In this window you can see all General ledger transactions including the VAT information. - Unreleased VAT transactions (TX40301S) New in all countries This window will show all VAT transactions that have not been processed in VAT reporting. - Layout templates - Finance VAT report, Norwegian 2022 (TX62106S) New in all countries exempt Norway This is the new VAT report for Norway for 2022, and will be used if the company is Norwegian.	☑	8.86.0
A new message on VAT report Sweden when selecting a company or a branch	As an accountant reporting for a Swedish customer, I want to print the VAT report for each Company or Branch depending on how the company is set up and get the belonging VAT figures based on the selection of Company/Branch don in the report screen. The VAT report, Sweden (TX621008S) does not have the same logic regarding File tax by branch and Multi-branch support. Therefore a message is added on the printed report if you select a wrong combination of company/branch. Only customers having multi-branch support activated will get this message If the company is Without branches, the message will not be printed. If the company type is With branches not requiring balancing or With branches requiring balancing and you select a branch in addition to the company, you will get the following text below the Momsregistreringsnummer (VAT-nummer): "Rapporten avser endast vald företagsgren." This is printed because the created report should contain all branches. If the company type is With branches requiring balancing and File VAT by branch is set and you only select a company, you will get the following text below the Momsregistreringsnummer (VAT-nummer): "Detta företag rapporterar moms per företagsgren." This is printed because the report created should contain only one branch.	☑	8.41.0
BREXIT per 01.01.2021 - Change country settings for GB and ND in templates	In new provisioned companies: The Intrastat settings on country level have changed - for GB (Great Britain), the Intrastat country and country code have been removed - for ND (Northern Ireland), the Intrastat country code has been changed from GB to XI. A new country code has been added: XI - Northern Ireland. In upgraded companies: A new country code has been added: XI - Northern Ireland.	☑	8.31.0

Remove documentation tag "in progress" for all documentation updates linked to the EC sales list feature. • https://jira.visma.com/browse/SIGMA-58096 - AP303000.		☑	Not Planned
COA templates updated with accounts for Visma.net Payroll	All COA templates used in First time startup are updated with accounts required for Visma.net Payroll.	☑	8.26.0 (8.26.0 8.1036)
New general ledger accounts added for Visma.net Payroll	New general ledger accounts have been added to meet the requirements from Visma.net Payroll. These accounts will not be updated to existing customers. 1572 Lønnsforskudd (som trekkes i lønn senere) 1579 Andre kortsiktige fordringer 2772 Skyldig finansskatt av lønn 2784 Påløpt finansskatt ferielønn 5250 Gruppeliveforsikring 5252 Ulykkesforsikring 5430 Finansskatt av lønn 5431 Finansskatt av påløpte feriepenger 5919 Trekk kantinekostnader ansatte	☑	8.25 (200908)
Tax year and Tax period tables extended with columns for created and last changed	The Tax year and Tax period tables have been extended with Created by, Created date/time, Created by screen ID, Last changed by, Last changed date/time and Last changed by screen ID columns. These are not visible for the user but they can be used in inquiries and by support to find out when a tax year or period was created and last changed. Tax year is updated when you make changes to a tax year in the VAT periods (TX207000) and Prepare VAT report (TX501000) windows when the first VAT period for a year is prepared.	☑	9.00.0
Error on changed account type in the Edit account information (GL50506S) window	In version 8.23, it is now possible to change the account type in the 'Edit account information' (GL50506S) window, with the 'Custom chart of accounts order' setting activated in the 'General ledger preferences' (GL102000) window. Earlier versions did not provide this option and returned an error message.	☑	8.23 (200609)
Excluded transactions from previous periods were incorrect when the VAT period was not the same as the general ledger period	When the VAT period was set to quarterly the Prepare where the Exclude VAT transactions for previous periods was used the report calculate the periods wrong. This is now fixed and the periods included are only the ones that belong to the selected quarter.	☑	8.23 (200609)
Changed the VAT rate for Norway to low rate as of 01 April 2020	The VAT has a low rate which is changed from 12% to 6% from 01 April 2020 and is set back to 12% from 01 November 2020. Note: This change will only be for newly created companies. The existing companies upgraded from 8.20 must do this manually.	☑	F2020 05
Fixed triple VAT values for landed cost variance in VAT account control window	In some situations, landed cost created 3 lines in General ledger transactions with a reference to the same order line. This caused the VAT to be shown 3 times when it should be shown only on one line. This has now been fixed for theVAT account control summary/details (TX40300S / TX40400S) windows.	☑	9.70.0

Send Danish VAT report electronically to Skat.dk from the Process VAT report window (TX502000).	It is now possible to send the Danish VAT report electronically to Skat.dk from the Process VAT report window (TX502000).	☑	9.73.0

After closing the report, the Send button will be enabled and you can send the report.
When sending the report, you are redirected to the AutoReport page where you will see the status of the process.
If all data is correct, you will get a message in AutoReport:
* Report has been sent to Skat. Please use the link to approve the report in Skat portal.
This status will also be updated in the Process VAT report and the AutoReport status windows.

Now you have to login to Skat.dk and approve the report.
You will have the button Approve at Skat.dk and this will open a browser window where you can log in and approve the VAT report.
This link is only valid for 14 days, so if the report is not appoved at Skat.dk before that date you have to resend the report.

If you have errors in the report, you will get an error code and message in return and you have to fix the date and resend the report.

NOTE!
The report must have the correct tax box number (Momsrubrik) that corresponds with what skat.dk requires.
By default, these are set up in the system when you have a Danish company.
Lines without Tax box number will not be reported to Skat.dk.

The Tax box number in Visma.net ERP contains a number and a <text>; the number represents the order in the XML file and the text is the Tag representing
Line Description Tax Box Number
100 Salgsmoms (udgående moms) 14 <MomsAngivelseSalgsMomsBeloeb>
200 Moms af varekøb i udlandet (både EU og tredjelande) 11 <MomsAngivelseMomsEUKoebBeloeb>
300 Moms af ydelser fra udlandet mv. 12 <MomsAngivelseMomsEUYdelserBeloeb>
500 Købsmoms (indgående moms) 09 <MomsAngivelseKoebsMomsBeloeb>
600 Olie- og flaskegasafgift 13 <MomsAngivelseOlieAfgiftBeloeb>
700 Elafgift 06 <MomsAngivelseElAfgiftBeloeb>
800 Naturgas- og bygasafgift 08 <MomsAngivelseGasAfgiftBeloeb>
900 Kulafgift 10 <MomsAngivelseKulAfgiftBeloeb>
1000 CO2-afgift 02 <MomsAngivelseCO2AfgiftBeloeb>
1100 Vandafgift 15 <MomsAngivelseVandAfgiftBeloeb>
2000 Moms i alt (positive=betale, negative beløp=penge tilgode) 01 <MomsAngivelseAfgiftTilsvarBeloeb>
2100 Rubrik A - varer. Værdien uden moms varekøb i andre EU-lande 03 <MomsAngivelseEUKoebBeloeb>
2200 Rubrik A - ydelser. Værdien uden moms af ydelseskøb EU-lande 16 <MomsAngivelseEUKoebYdelseBeloeb>
2300 Rubrik B - varer. Værdien af varesalg uden moms til EU-lande 04 <MomsAngivelseEUSalgBeloebVarerBeloeb>
2400 Rubrik B - varer - indberettes ikke til "EU-salg uden moms". 05 <MomsAngivelseIkkeEUSalgBeloebVarerBeloeb>
2500 Rubrik B - ydelser. Værdien af ydelsessalg uden moms til EU 17 <MomsAngivelseEUSalgYdelseBeloeb>
2600 Rubrik C. Værdien af varer og ydelser, der leveres uden moms 07 <MomsAngivelseEksportOmsaetningBeloeb>
2700 Køb indland uden moms
2800 Salg udenfor momslovens anvendelsområde

Performance improvement on VAT report details window (TX502010)	The performance of the VAT report details (TX502010) window has been improved. Measurements on the test environment shows that in cases where loading the data on the screen gave a time out error, it now takes 10 seconds to open and 2 seconds to move between pages. The test data used had 100.000 documents. The column for batch number has been removed since this was the cause of the poor performance, but you can use the button View batch for the marked row to see the number. The performance of this window will be improved even more. Lookup on Ref. number has also been fixed, and it now works correctly also for VAT adjustments.	☑	9.53.0
TaxExemptionReason missing in SAF-T file	The TaxExemptionReason was missing in the SAF-T file when the tax was partly deductible and the TaxBase included the non-taxable amount. This has now been fixed and corrected in the SAF-T file.	☑	9.52.0

Performance on Tax account control details (TX40400S) improved	The VAT account control details (TX40400S) window has been changed and it now has pagination to improve the performance and timeout. There is still an issue with a large number of transactions that it takes time and this will be addressed in a later release.	☑	9.51.0
Reporting ledgers now excluded from SAF-T report	Earlier, reporting ledgers were included in the SAF-T report. This has now been fixed and only the Actual ledger is reported.	☑	9.51.0
Improvement of control account handling in Recurring entries	In version 9.54, handling of entries containing module control accounts has been improved. When you change the status of a control account from allow manual entries to not allow manual entries after the schedule transaction is created, you will receive an error message when you run the recurring transactions in GL504000: 'one or more items have not been processed'. This indicates that no journal entry was created due to the changed account usage restriction for the control account.	☑	9.54.0
Customer write-off works without setting the write-off account as control account.	Customer write-off works as before and you do not need to set the write-off account as control account for Customer ledger. If you want to use supplier write-off, you need to set the write-off account to 'Supplier ledger and Customer ledger' if the same account is used. If this account is also the default rounding account, you must select 'Allow manual entry' in addition.	☑	
Rounding of supplier write-off requires a control account	When you make a supplier write-off from Purchase invoice (AP301000), you get an error that the defined account for the rounding is not defined as an control account. To be able to release the created debit adjustment, you have to set this account to a control account for Supplier ledger and Customer ledger and check the Allow manually entry option.	☑	9.55.0
Timeout during opening and processing of data in Prepare VAT report window	In the Prepare VAT report (TX501000) window, the way of collecting data has been modified to avoid timeout during opening and processing. This will improve the performance when showing and processing the data.	☑	9.41.0
Performance improvement creating the SAF-T file	The performance of the creation of SAF-T files hs been improved. Some tests have reduced the time by 2/3.	☑	9.51.0
Warning when selecting Intrastat country without defining Intrastat reporting country	In the Countries/States/Postal codes (CS20400S) window, you will now get a warning if you select Intrastat country without filling out the Intrastat reporting country. It is mandatory to select an Intrastat reporting country when you select an Intrastat country and it is used in the reporting process.	☑	9.26.0
Unreleased tax amount is not displayed for multi-branch company	Earlier, there was an error in VAT periods when you had a multi branch company and the Unreleased tax amount only showed the active branch. This has now been fixed so that if no VAT report has been processed for the selected year, there will be no values.	☑	9.07.0
Update of financial date when financial period is changed	When the financial period is changed on a purchase invoice manually or in the Prepare for closing (AP50700S) window, the tax transaction is now correctly updated with financial period and financial date.	☑	9.07.0
Change supplier reference on Tax agency invoices/purchase credit notes	The Supplier reference column in the Purchase invoices (AP301000) window is now editable until the invoice is closed for Tax agency invoices. This enables the entry of the payment reference given by the tax authority if it's missing or is wrong. If it's used on another invoice, you will get an error message that will disrepair when you save the invoice.	☑	9.01.0
Closing a VAT report when using an account in posting with an account group with a value	Earlier, there was an error when closing a VAT report when an account used in the posting had an account group with a value. This has now been fixed. Purchase invoices and credit notes created from the Process VAT report (TX502000) window will ignore this setting and create the document. The accounts in the documents having an account group will not have any value in the project but it will be empty. If you reverse the invoice or create a purchase invoice/credit note manually, the project column will be mandatory and you will get a message when you try to release the document.	☑	9.00.0

Allow posting on closed periods in General ledger preferences in posting tax agency invoices to corresponding open period	You do not need to check the Allow posting on closed periods option in the General ledger preferences (GL102000) window to post tax agency invoices to the corresponding open period if the period is closed in supplier ledger. As long as the period is open in general ledger, the invoice and batch for the VAT will be posted in the open period. If the period is closed in General ledger, you have to check the Allow posting on closed periods option in General ledger preferences. Inactive periods will be ignored and posted according to the rules mentioned above. So you will not get the error that the period is inactive. The following messages will be given depending on the setting in General ledger preferences Allow posting on closed periods not set: The financial period P1-YYYY corresponding to the end date (DD.MM.YYYY) of the tax period 'P1-YYYY' is closed. The generated documents will be posted to the first available open period P2-YYYY. Check Allow Posting to closed periods in General ledger preferences (GL102000) to post the documents on the closed period P1-YYYY. Allow posting on closed periods is set: The financial period P1-YYYY corresponding to the end date (DD.MM.YYYY) of the tax period 'P1-YYYY' is closed. The generated documents will be posted to the closed period P1-YYYY. Uncheck Allow posting to closed periods in General ledger preferences (GL102000) to post the documents on the first available period P2-YYYY.	☑	9.15.0
Action for reopening a VAT period added to the VAT periods (TX207000) window	A new function to reopen a VAT period has been added under the Actions menu in the VAT periods (TX207000) window. You are now allowed to reopen a closed period and it will be set back to status Prepared so it's possible to void it or make adjustments. The tax invoice that was created when the period was closed will not be reversed and you have to reverse it manually. When you close the period again, a new invoice will be created unless you temporally change the settings to create VAT invoices, a setting on the Tax agency supplier. It's not possible to reopen periods if you have a prepared the period and if the VAT period is in a closed financial year.	☑	9.06.0
No more error message when using the same supplier reference for a Tax agency	When you enter the same supplier reference on a tax agency supplier in the Purchase invoices (AP301000) window, you will no longer get an warning or error message since you must be able to enter the same reference on all invoices that are in the same VAT period. For a normal supplier, you will get the normal messages depending on the settings for checking of supplier reference.	☑	9.12.0
Payment reference on branches with File tax by branch is not updated in purchase invoice	For the Dutch VAT report (TX62105S), the payment reference in the Process VAT report (TX502000) window is updated in the Supplier reference field on the purchase invoice. When you close the VAT period for a multi-branch company, only the invoice for selected branch was updated with the payment reference. This has been fixed and all invoices are updated with the payment reference for each branch.	☑	9.12.0
Status icon added on lines in AutoReport status window	In the AutoReport status (TX50500S) window, you will now have a green tick icon on lines that have the status Accepted by government and a red one for all error statuses. Lines with other statuses don't have any tick icon.	☑	8.82.0
New column for attachment in AutoReport status (TX50500S)	In the AutoReport status (TX50500S) window, there is a new column for attachments.	☑	8.80.0
A new column Tax rate is added to the report lines in Prepare VAT report and Process VAT report.	A new column Tax Rate is added to the detail lines in Process VAT report (TX502000) due to the new requirement for the Norwegian VAT report from 2022. The column is hidden by default but can be unhidden. Lines summaries multiple rates contain one of the rates, this column will not be reported for other reports than the Norwegian report from 2022 and summary lines does not report rates.	☑	
Report ID in Auto Report status (TX50500S) window	When validating and sending VAT reports, the details about each action are found in the AutoReport status (TX50500S) window with a unique report ID. Use the filter Report ID to find the report ID that is used in the XML file as reference towards the Norwegian Tax Authorities.	☑	8.80.0

New VAT settings for new Norwegian companies to follow the tax reports for 2022	The VAT settings have been modified due to the changes in the VAT report for Norway from 2022. - Reporting settings (TX205100): Reporting lines All lines used for reports before 2017 are deleted and lines for 2017-2021 are updated with To VAT period 06-2021 New lines for 2022 are created following the SAF-T coding. - Reporting groups: All old reporting groups are deleted and replaced with new groups following SAF-T codes - Reporting groups (TX205200): All reporting groups are linked to the 2017-2021 lines and the new 2022 lines - VAT zones (TX206000): One new zone customer zone is created for Internal withdrawal of goods and service - VAT categories (TX205500): All existing codes are kept but the descriptions are aligned to the usage and equal to VAT group and VAT ID New codes for withdrawal (3U, 31U, 32U, 33U, 5U), losses on outstanding claims (0T, 1T, 11T, 12T, 13T), adjustment of input VAT (1J), and reversal of input VAT (1TB) are created. - VAT ID (TX205000): All old VAT numbers that referred to the line number they were reporting to have been deleted and replaced with new lines using the SAF-T code as ID. They are linked to the corresponding VAT zones and VAT categories with same ID as the VAT ID. The schedules are created pointing to one Reporting group. Only the low rate has more than one row due to the change in 2020 and 2021.	☑	8.72.0
All country specific VAT reports available in all countries	All country specific VAT reports are available in all countries since you are now able to create tax reports for other counties. It's important that the reports contain the same VAT box number and texts as in the country of origin for the created report.	☑	8.84.0
Error running the Norwegian VAT report (TX62104S)	Earlier, there was an error when running Norwegian VAT report (TX62104S) in version 8.59. The error was caused by a change of columns internally in the database and the report contained the old value. It has now been fixed. Also, an error when entering a To VAT period in the report settings has been fixed.	☑	8.60.0

Move of extended columns for Tax, Tax Category and Tax Report Lines, affect reports and inquiries.	The tables VAT, VAT category and Reporting setting have been changed where the extended columns has been moved into the main table If these columns are used in any Report or Inquiries they have been replaced to the new column during upgrade. VAT (TX205000) EU report code Default non-stock item Visma XML VAT type VAT category (TX205500) Standard VAT code Reporting settings (TX205100) - Report lines: Sort order line - Removed From VAT period To VAT period Report designer There is changes Tax element for the Report designer and there are now more columns available from taxes. For customers that have made changes to the reports have to select the report and run the [Refresh dataset] for the customized report to get access to the new columns in the report. The affected reports: Purchase order VAT - subreport - PO6401SR Unreleased transactions (detailed) - AP610500 Unreleased transactions - AP610700 Unreleased transactions (detailed) - AR610500 Unreleased transactions - AR611000 Customer documents (detailed) - AR622000 Unreleased transactions (detailed) - CA612500 VAT details by general ledger account by date - TX622500	☑	8.58.0
Confirm the latest processed EC sales list (IA40501S) window	As an accountant or report responsible I want to get information if this process has been run previously for the company so that I can verify what transactions has been processed. If the routine has been run before for the company, you will get a message in the window with information about the last processed period end date: "Data has been run until: [date] You can then select a later period and run the routine again. Then the transactions older or equal to the period will be marked as processed and the date will change.	☑	8.42.0
Change in report codes in EC sales list generic inquiry	In some cases an error occurred when you wanted to process previous reported EC sales list periods because the created Report cd was to long. This has now been fixed and the Report cd is changed to fit the size of the column. The EC sales list window (AR4050PL) has been changed to handle the new code in addition to the old code. A change in the List window for EC sales list (AR4050PL) has been done due to a change in the report code when verifying earlier closed reports. The condition is changed from Does not contain ='MAPOLDTAXTRAN' to ='MAPOLD' If you in the EC sales list report see codes having the code MAPOLD[number], the Generic inquiry has been changed by a user. The new version has not updated this, and therefore you have to change manually.	☑	8.42.0
New column in Customers window to exclude customer from EC sales list	There is a new column in the Customers window (AR303000) named Exclude EC sales list. Checking this column will exclude this customer from the EC sales list report (AR40501S). You will see the invoices/credit notes that have a tax code that is set to report on the EC sales list transaction tab, but the column selected will be disabled and you will get a warning. On the Report tab the customer is excluded. The warning: EU sales list is disabled for this customer. Enable this setting in the Customers window if you need to include this customer in the report.	☑	
VAT report details shows wrong batch number when invoice and credit note have the same reference number.	As an accountant I expect that Invoice and a Credit note that have the same Ref. nbr. will show the right Batch number in VAT report detail screen and not that the Credit note show the Invoice batch number. This is now fixed an the correct batch number shows for both documents.	☑	

Change of tax report period implemented in VAT periods (TX207000) window	There is a new check box in the VAT periods (TX207000) window: Change tax report period. Checking this will lead to a dialog with the message "Are you sure you want to change the report periods? This will change the report interval for the coming VAT reports." Answering Yes, the Tax report type will be editable and you can change to another type. When you do a change, the VAT periods that are open will be changed to the new type. The system will calculate the new periods based on processed periods and the new type you have selected. If you change from Quarterly to Monthly where quarter 1 is closed/prepared, you will get monthly from period 04. If you change from Monthly to Quarterly where period 01 to 04 is closed/prepared you will get quarterly from period 07. If you change to a type that does not fit into the remaining periods, you will get an error message in Tax report type field. If you have saved the next VAT year, you will get the message "Because the end date of the tax year has been changed, the subsequent tax years will be deleted. Please review and modify the next tax year settings if required." and this will be deleted.	☑	9.06.0
Receipt pdf file missing when the report has been approved at Skat.dk	When the VAT report is approved by Skat.dk, the receipt message is sent from AutoReport to Visma.net ERP. In AutoReport status, you will see the updated status and it is updated with Due date, Payment ref. and Bank account for payment and you have an attached receipt file on the report line. If the supplier ref. and Payment ref. no are empty, these columns will be updated with Payment reference and the due date is updated.	🔖	9.86.0
Improvements and changes in Standard VAT codes (CS20500S)	Changes made to Standard VAT rates (CS20500S) New columns available: - VAT rate description (32 characters) - can be used for additional code. - Note - can be used to describe the usage of the code - Files - can be used to add public documents regarding the code. Import from file: Import has been implemented and all columns except notes and file attachment can be imported. Note! The screen only shows codes with the same country as the active company. So, if you import codes for other countries, you have to switch to a branch that has the other imported country. If the import file is missing country, it will be created with the country code from the active branch.	🔖	9.68.0
Standard VAT codes for Denmark implemented	Standard VAT codes for Denmark are implemented and can be selected on the VAT categories. This value is used only when you create a SAF-T report and have no other affect on the VAT calculation and function. All codes are there, but Visma.net ERP does not support all of the codes. If no change has been made on VAT category, they will be updated with the Standard VAT code VAT category Description Standard VAT code I0 - Køb indland uden moms - K0 I25 - Køb indland med moms - K1 IREP - Repræsentationsmoms - K25A IVEU - Køb af varer fra EU-lande - KEUV1 IVU - Køb af varer fra lande uden for EU - KUEUV1 YEU - Køb af ydelser fra EU-lande - KEUY1 IYU - Køb af ydelser fra uden for EU - KUEUY1 U0 - Salg indland uden moms - S0 U25 - Salg indland med moms - S1 UVEU - Salg af varer til EU-lande - S2 UVU - Salg af varer til lande uden for EU - S4 UYEU - Salg af ydelser til EU-lande - S3 UYU - Salg af ydelser til lande uden for EU - S5	🔖	9.56.0

SAF-T report added for Denmark, Finland, and the Netherlands	In the Menu for VAT under Processes, the SAF-T report that has existed for Norway and Sweden, has now been added for Denmark, Finland, and the Netherlands. You have to select the full menu to see this in the menu. This is a Norwegian report XML format required for report accounting details to the government and can be used to export general ledger accounts, customer, suppliers, subaccounts and projects with address and other financial data. For general ledger accounts, customer and suppliers, you also get the opening and closing balance and all general ledger transactions with VAT information are exported for the given period. You will download a zip file containing the data. This will meet the new Danish requirements for reporting accounting data. The Send button is only available for Norwegian companies.	🔖	9.65.0
Mapping of Standard account codes for Denmark in Chart of accounts	The Chart of accounts has been updated with the Standard account codes in the the column Public code 1. Existing companies will be updated with this code if they have not been changed by the user. There is no lookup of valid codes so the user must update this according to www.Erhvervsstyrelsen.dk /standardkontoplan Note! The Public code 1 is only used when creating the SAF-T report that will be available for Denmark in a later release.	🔖	9.57.0
Performance of SAF-T report improved	The performance of the Customer and Supplier tabs on the SAF-T report as well downloading and sending of the report have been improved. The timeout when selecting the Customer or Supplier tab has been fixed.	🔖	9.61.0
SAF-T report (TX50600S) available for Swedish companies	The SAF-T report window (TX50600S) is now available for Swedish companies and located in the menu under VAT -> Processes. For Swedish companies, the Send button is hidden and contact information is selected from the Main company's Main contact and not the Altinn settings that do not exist in Swedish companies. It requires that at least contact person is filled out before you can download the SAF-T file.	🔖	9.35.0
The calculated VAT rate is changed to only show 2 decimals	In the VAT account control summary (TX40300S), VAT account control details (TX40400S) and General ledger transactions with VAT (TX40500S) windows, the calculated VAT rate is changed to only show 2 decimals. This way the calculation with a variance in the 3-6 decimals will not show as derivations when you use the checkbox Show only tax derivations. Only derivations with 0,01 or more will be shown.	🔖	9.24.0
Restrict usage of general ledger accounts marked as control account	There is a new column, Allow manual entry, in the Chart of accounts (GL202500) window. With this column you can restrict the usage of general ledger accounts marked as control account. It is not possible to select control accounts with the deselected Allow manual setting for direct posting in the Journal transactions (GL301000) window or select them in any account field anywhere in the system. These restrictions will be suspended when the Allow manual entries check box is selected for control accounts. New provisioned companies will by default have the the setting deselected for all control accounts (except Finland and the VAT settlement account). In upgraded companies the control accounts will have the Allow manual entry setting selected.	🔖	9.50.0
Filter on From and To period in Account summary window	The Account summary (GL401000) window now includes From and To period fields that enable you to see the beginning balance for one period and the ending balance for another. The Debit total and Credit total fields will show the sum for the range of the periods selected. So now you can see the beginning and ending balances for a year. Note! If you select a range that crosses an accounting year, the beginning and ending balances for income and expenses will not be correct compared to the debit and credit totals.	🔖	9.24.0
Local tax authority pre-selected in tax windows	The new column for Default Tax agency has been added to the VAT information tab in the Organisations (CS101500) and Branches (CS102000) windows are now working for TX501000 Prepare VAT report TX502000 Process VAT report Getting the tax agency works as follows: - If the selected company/branch has a default tax agency set, it will be suggested. - If default tax agency is empty in the company/branch, the windows will use the existing, else select the first tax agency from the lookup.	🔖	

Local tax authority pre-selected in VAT windows	There is a new column for Default Tax agency on the VAT information tab in the Organisations (CS101500) and Branches (CS102000) windows and it is used in TX501000 Prepare VAT report TX502000 Process VAT report Getting the tax agency works as follows: - If the selected company/branch has a default tax agency set, it will be suggested. - If default tax agency is empty in the company/branch, the windows will use the existing, else select the first tax agency from the lookup.	🔖	9.18.0
Performance of the VAT account control summary (TX40300S) improved	The performance of the VAT account control summary (TX40300S) has been improved. You now have to enter both From and To period before getting data, so when you want a period interval, you do not have to wait to enter the to period. The default for Show only tax derivation has been changed so it is not set. The grouping of data is not changed so the values in Workspace, Transaction type, and VAT category are correct. Earlier the value was the lowest value of the result set.	🔖	9.65.0
Performance on Prepare VAT report (TX501000) improved	Due to a timeout when opening the Prepare VAT report (TX501000) window, some changes have been done in the query that collects the data. This has improved the speed a little so it should not time out for the customer.	🔖	9.06.0
Change suspended VAT changed to handle transactions created in 2021 but reported in 2022	The Change suspended VAT (TX40501S) window has been changed to handle transactions that have been created in 2021 but will be reported in 2022. It will show transactions where the VAT is suspended 31.12.2021 and also codes where the report group has been changed in 2022. This is applicable only for Norwegian companies that were created before version 8.72.	🔖	8.89.0
Download VAT report as XML file to AutoReport	Download XML file is added to the Reports menu in the Process VAT report (TX502000) window and it will download the XML file Visma.net ERP is sending to AutoReport. This report cannot be uploaded to the authority's portals because it's not in the correct format. This will mostly be used for support purposes so that it is possible to verify what is sent to AutoReport. The report for Norway from 2022 is created in the correct format but not prepared for manual upload to Altinn.	🔖	8.89.0
Hidden window TX40501S for correcting suspended VAT IDs for 2022	A hidden window has been created where you can correct suspended VAT IDs to VAT IDs valid for 2022. The ID of this window is TX40501S and you have to enter it into the URL to access it. In this window, you will only be able to see and correct suspended VAT IDs. You'll find more information in the community.	🔖	8.83.0
Performance improved on SAF-T report	There have been changes in how data are retrieved from the database, which will improve the performance of the SAF-T report (TX50600S).	🔖	8.85.0
View transactions when filtering on date in Account details	Previously, when filtering on date in Account details window (GL404000), a transaction was registered and no result was presented. This has been fixed and now you are able to see the transactions when filtering on the date it is registered on.	🔖	9.43.0
New specification for adjustment of VAT code 81 added to Norwegian companies	The Tax authorities have added a specification for adjustment for VAT code 81 and this code has been added with the VAT category 81J and belonging VAT ID's 81J and 81JR. The license for reporting this new code has been added to the tax report and tax groups.	🔖	8.84.0
Warning on documents from 2021 not processed in a tax report in 2021	A warning message will be shown in the Prepare VAT report (TX501000) and Process VAT report (TX502000) windows when you process VAT reports in 2022 and there are documents from 2021, which have not been processed in a tax report in 2021. In this case these documents can have a wrong VAT code and will not be included in the VAT report for 2022. So when getting this message, you should follow the link and find out how to handle these documents. There is a hidden window Change suspended VAT code (TX40501S) where you can correct the old transactions.	🔖	8.89.0

New column for marking an account as control account for customer ledger and supplier ledger	There is a new column, Control account module, in the Chart of accounts (GL202500) window. With this column you can mark an account as Control account for the customer ledger and supplier ledger. The marked accounts can be entered in the Customer account field, the Supplier account field and prepayment field for customers and suppliers all over the system. In combination with the second new column, Allow manual entry, restrictions on usage of these accounts will occur. New provisioned companies will have the correct values applied to the default customer, supplier and prepayment accounts. Upgraded companies will have the correct values added to the accounts used in the Customer classes (AR201000) and Supplier classes (AP201000) window and to all accounts eventually used in customer or supplier documents.	🔖	9.50.0
New window Customer and supplier reconciliation (GL408000)	In version 9.51, there is a new window, Customer and supplier reconciliation (GL408000), in the inquiry section of the general ledger workspace. The purpose of this new inquiry is to help the user with reconciling General ledger balances of the customer and supplier accounts with the balances from the customer and supplier ledger. According to your chosen settings for period, Control account module, account and company/branch in the header section, the table shows per account all the relevant balances and eventual differences between the ledgers. By clicking the balances and deviation amounts you are redirected to the respective detail screens for further drill down.	🔖	9.51.0
New parameter in Profit & Loss and Balance reports (ARM) for improved performance	In the Report definitions (CS206000) window, there is new parameter "Account type". It includes the options All, Asset/Liability, Income/Expense, Asset, Liability, Income, and Expense. Depending on the report and data, the improvement is about 20% when this parameter is used. In new companies the values are preconfigured. It is recommended to set the value for the ARM reports you are currently using in existing companies. - For the Balance reports, use Asset/Liability. - For Profit & Loss reports, use Income/Expense. - For combined reports, use All for Account type. In case unit sets are used, filtering is based on both this parameter Account type and the unit set settings, so it's recommended to check that these parameters do not have any counter-conflict, so that an empty report is shown.	🔖	8.85.0
Performance improvements in Account summary (GL401000) window	Improvements in getting the account summary have been implemented and the performance has been improved.	🔖	8.70.0
Print VAT report button added in Process VAT report window (TX502000)	A new dropdown button Reports with option Print VAT report is implemented in Process VAT report (TX502000) window. Printing the report from this window will use all the settings in the window and make it easier to print a correct report. The report used is depending on the selected company's country, so if you have activated mulit-branch support and created companies with different countries, it will print the report for the company's country. NO - Norwegian VAT report also depending on before and after 2022 SE - Swedish VAT report FI - Finnish VAT report NL - Dutch VAT report All other countries - Standard VAT report	🔖	8.84.0
New layout for Norwegian VAT report	There is a new form for the Norwegian VAT report 2022 (TX62106S), following the new regulations.	🔖	8.80.0
Subaccount segments added as hidden columns in some inquiries	Subaccount segments are added as hidden columns to the inquiries Deferral schedule summary (DR401000), Voucher details inquiry (GL40601S), Account by subaccount (GL403000) and Account details (GL404000).	🔖	8.72.0
Warning on VAT impact in Norwegian companies in Prepare for closing when moving older invoices to 2022	In the Prepare for closing (AP50700S), window, when you move invoices to 2022, there will be a warning regarding that the VAT codes will not be correctly updated to the new VAT codes valid from 2022. It is recommended to manually change the date for the invoice to be in 2022 to receive the correct VAT code.	🔖	8.77.0

Hide rows with no amount in prepare and process VAT report	In the Prepare VAT report (TX501000) and Process VAT report (TX502000) windows there is a new check box in the heading of the detail lines called "Hide rows with no amount". When this is selected, lines without any transactions will be hidden so you will only see the lines having any VAT transactions. If it is selected when you prepare the report, it will also be set in the Process VAT report window. This has been implemented for the new Norwegian VAT report that contains almost 100 lines to make it easier to find the various VAT codes that will be reported.	🔖	8.64.0
Upgrade of new VAT codes and VAT report for Norwegian VAT reporting 2022	All Norwegian companies have been upgraded with the new VAT report and VAT codes for the new report coming in 2022. The following places are affected by this upgrade: VAT: A new code has been added and all of the old codes are set to be terminated by 31.12.2021 with 2 exemptions: Codes 0F and 6F are terminated at upgrading date and they are included in 0 and 6. The previous VAT IDs referred to the report line they were included into but from 2022 the VAT IDs refer to the SAF-T code they report to. All new schedules are using the new tax groups created for 2022. VAT categories: All old codes remain as before and only some new codes are added to be able to report the special codes for loss, withdraws, and adjustment. VAT zones: No change in zones. VAT report lines: All old lines are updated with To VAT period = 06-2021 or, in case of monthly reporting 12-2021. New lines are added for each SAF-T code. VAT reporting groups: New reporting groups are added and they are all starting with the SAF-T code they should report to. The upgrade is testing if the company should be VAT-exempt and if the following taxes have 0,00 rate, it will be considered as VAT-exempt. (01,02,03 old from 2016) and (3,4,5,9,14 new in 2017). If the company was a part of the upgrade in 2017, the customer zones and supplier zones are not using the old from before 2017. The customer zones are: 01-> 04 02-> 05 03-> 03 The supplier zones are: 01-> 10 02-> 11 or 12 01R-> 13 If you are still using the old zones with the same ones for customers and suppliers, the mapping between VAT and zones will not be created. If you do not have the new VAT categories representing the SAF-T, the mapping between VAT and VAT categories will not be created. If you have created a code that is going to be used as a new one, the new code will get the suffix 'I'. For example, if you have added code 20, the new code '20' will be '20I' The AutoInvoice settings (CS10250S) need to be adjusted when you start processing invoices for 2022 in Invoice Inbox (AP50604S).	🔖	8.76.0
Send all attachments and notes to tax authorities with tax report	Notes and file attachments are now added to the VAT report lines and you are able to attach up to 15MB of files and write notes on all lines and the header. If you write a note to a line that is not reported, you will get a warning that you have a note that is added to a line that will not be sent.	🔖	8.73.0

It is now possible to add notes and attachments in Process VAT report window	In the Process VAT report window (TX502000), file and note have been added on the report lines and the name of the Remarks column in the heading has been changed from Comment to Note to tax agency. Regarding the Norwegian VAT report for 2022 you will get additional information. If you add a note or files to a line that does not have a Tax box number you will get the message: Notes and files on lines without tax box no. will not be sent to the tax agency. You can add attachments up to 15 MB to the report and a note on each report line and will get a message: Your attachments have reached XX MB. The limit is 15 MB. Remove or change some attachments to send the report. The notes and attachments will be sent to Altinn for reports for 2022.	🔖	8.73.0
Validate action added to Process VAT report window (TX502000)	A new VAT report for Norway 2022 is implemented In the Process VAT report (TX502000) window, there is a new button for validating the report at Skatteetaten before sending it in. This button will only be visible when you select a report period for 2022 and it's active when the report has the status Prepared or Closed. In the window you will get the returned error(s) in the heading for general errors and on the line for a line containing errors. When sending the VAT report for 2022, the report will be validated again and sent if there are no errors. There is a new column Validation message on the heading. There are two new columns on the report lines, Validation message and VAT rate. They are hidden by default. The difference between reporting in 2021 and 2022 is that the XML format is changed and now the report will be validated for errors and rejected if any error is found. You are also able to validate the report any time before you send it.	🔖	8.76.0
New accounts added in chart of accounts for new VAT handling in the Norwegian template	The following accounts have been added in the Norwegian template that will be used for VAT handling for import VAT. 2705 Utgående merverdiavgift innførsel av varer, høy sats 2706 Utgående merverdiavgift innførsel av varer, middels sats 2707 Utgående merverdiavgift innførsel av varer, lav sats NOTE! These accounts will not be added in existing companies.	🔖	8.54.0
Performance improvement on Account specification report	The Account specification (GL63301S) report has been modified so it that its performance is faster, some subqueries not used in the report are removed, and getting some account dates has been changed so that they are not a part of the main query. These changes will improve the performance of the report.	🔖	8.65.0
Performance of General ledger transactions with VAT (TX40500S) improved	The performance of the General ledger transactions with VAT (TX40500S) window has been improvement and the query has been changed. It has been measured to be 3-4 times faster but that will vary depending on the data. The subaccount column in the heading of General ledger transactions with VAT window is now working the same way as in Account details where you can select one or more segments and only transactions matching the selected part of the subaccounts will be shown. Several links in the line details are removed since they just did a lookup in the basic registers (Period, Trans. period, Account, VAT category, Tax agency, Customer/Supplier, Subaccount). There is a new Link to the documents' reference number. The column Ledger has been removed since there is only one ledger. Cash sales and return are now showing correct signs when you have a negative line in the details	🔖	8.94.0
Message on changes in critical branch information	Visma.net ERP will start to broadcast a message whenever there is a change in critical branch information, such as organisation number, name, ID, etc. This message would be picked up by other integrated assets to show the branch level details. This does not affect any existing end user functionality and runs in the background.	🔖	8.68.0

Local tax authority pre-selected in tax windows	A new column for Default Tax agency has been added to the VAT information tab in the Organisations (CS101500) and Branches (CS102000) windows. Here you can select suppliers that have the option Supplier is tax agency activated. When it is activated, the Tax agency will be suggested in the following windows: TX502010 - VAT report details TX40300S - VAT account control summary TX40400S - VAT account control details TX207000 - VAT periods TX301000 - VAT adjustments AR40501S - EC sales list TX503500 - Recognise input VAT TX503000 - Recognise output VAT TX205200 - Reporting groups TX205100 - Reporting settings AR40500S - EC sales list (old) Getting the tax agency works as follows: - If the selected company/branch has a default tax agency set, it will be suggested. - If default tax agency is empty in the company/branch, the windows will use the existing, else select the first tax agency from the lookup. - In windows where company/branch does not exist, the default from the active company/branch will be used, or the first in the lookup. NOTE! Exeptions are for the the sceens TX501000 Prepare VAT report TX502000 Process VAT report They will for now only select the first tax agency in the list if empty and else the selected in the screen when changing Company/Branch.	🔖	9.10.0
Search in the description column of external code 1 and 2 in Chart of accounts	As a user I want to be able to write a part of the code or description in the column and it will be used when searching for matching values: This has now been implemented in the columns External code 1 and 2 in the Chart of accounts, and both the code and description are a part of the search when you start writing a text.	🔖	8.47.0
Manually handle EC sales list report without sending it to AutoReport	To be able create a new EC sale list without sending it, there is now new status "Closed" and button "Close period" for that. This will change the process and you have to close the report before you can send it to AutoReport. If you close a report without transactions you will get a dialog with a message: There are no transactions with these selection criteria. You can close the period but only reports with transactions can be sent to Autoreport. Answer OK the report will be closed answer Cancel you will get back to the report and can make changes in selections. The Send button will not be active if the closed report does not contain transactions because it's required that a report contain at least one transaction.	🔖	8.45.0
Improved performance for Auditfile export (GL40200S)	The performance of the Audit file export (GL40200S) has now been improved.	🔖	8.54.0
New option File EC sales list by branch in Organisations window	As an accountant or report responsible, I want to be able to report VAT on company level and EC sales different on branch level, or VAT on branch level and EC sales on Company level. Linked to the new EC sales list, a new check box "File EC sales list by branch" has been added to the Organisation details tab/Organisations window (CS101500). This check box will be selected for all organisations with branches to work the same way as the old EC sales list (AR40500S). For organisations reporting on organisation level and not on branches level, you can now deselect the check box to report on organisation level again.	🔖	8.42.0
Legal changes to Intrastat report	In the Netherlands, VAT number and country of origin have been included in the Intrastat report from the beginning of 2021. The legal changes in the Intrastat transaction codes for Sweden, Finland, and Denmark have also been updated.	🔖	8.33.0
SIE export performance improvements	Version 8.30 includes data retrieval improvements for the SIE export which will increase the performance of this process.	🔖	8.30.0

Rounding and precision to be applied on EC sales reporting	As an accountant or report responsible I want to be able to set the rounding rules on the EC sales list based on country and currency rules so the reported amount is rounded according to how VAT is rounded. Rounding roles for the EC sales list are added to the Tax agency supplier so it possible to set rounding different depending on country and currency. There are new columns for the EC sales list settings on the Tax agency settings tab: EC sales list rounding: Here you can select between Mathematical, Ceiling, and Floor EC sales list precision: Here you set the decimal to round on Use currency precision: Uses the rules of currency decimals.	🔖	8.40.0
Add the columns Project and Project task in the Journal reconciliation window	In version 8.28, columns for Project and Project task have been added to the Journal reconciliations window (GL30201S).	🔖	8.28.0
Give a Brexit warning in EC sales list in December 2020 and January /February 2021	Brexit will soon be due, and companies trading with Great Britain and Northern Ireland should be made aware that they need to update the VAT rules for customers located in these two countries. In this release, there is a reminder message about this in the EC sales list (AR40500S) window. The reminder is first displayed when the company is creating a report for December.	🔖	8.30.0
BREXIT per 01.01.2021 - Mass update your British and Northern Ireland customers to reflect VAT changes	In the 'Change customer details' (AR50107S) window, you are now able to mass update the following settings for your customers: - the customer class - 'Exclude from EC-Sales list" checkbox When the checkbox 'Update the customer's setting with the customer class default' is selected, it updates the customer's default settings according to the new class, except the country and the currency.	🔖	8.31.0
New EC sales list report improving preparing and report corrections	As an accountant or report responsible i want to be able to send corrections from pervious periods in the current report or just send corrections for a period instead of a complete report inclusive corrections. I also want to have a log of what was sent at different times. In this version we are releasing a new and improved EC Sales list report (AR40501S). This report allows you to better prepare and modify your report before sending it to the government. If you later need to send corrections to the report, you can easily send a revision of the complete report or only the corrections. The new EC sales list: - uses the same date selection as the VAT report. - uses the VAT registration number and the country of the customer location. - allows you to have the same VAT registration number on several customer. - allows you to exclude transactions and customers from the report. - reports corrections from earlier periods on separate lines (NL). NOTE! Before you start using the new EC sales list, it is important that you check that you have completed and sent the previous report. This is to avoid already reported transactions from being reported again. In the Help center, you find information about the steps you should do to check. It is also described how to start using the EC sales list if you are a new customer and never used the EC sales list before, and finally what to do if you are migrating from another ERP system.	🔖	8.40.0
Company and Branch in Deferral schedule summary (DR650040) report	The Deferral schedule summary (DR650040) report has been extended with the following parameters - Company/Organisation - Branch	🔖	8.25 (200908)
Filter on company and branch in the Deferral schedule summary window	In the Deferral schedule summary (DR401000) window, you are now able to filter based on company and branch.	🔖	8.25 (200908)

Finnish tax administration changing from Katso to ApitamoPKI	As per 2021, the Finnish tax administration is changing to the new interface, ApitamoPKI, because the Katso secure sign-in service will be phased out. This change imposed some changes in our system, too: a contact email address and language have to be sent through the VAT and EC sales list reports. You have the option to set the default email address and language in the Organisations (CS101500) window on the AutoReport settings tab. You also can fill in the email while sending the reports in Process VAT report (TX502000) and EC sales list (AR40500S) window. The two fields are mandatory, and the language will be automatically set to Finnish if not filled in.	🔖	8.31.0
Filter deferral transactions on company and branch	In the Deferral transaction summary (DR402000), you can now filter transactions based on company and branch.	🔖	8.25 (200908)
Deactivate deferral codes	Deferral codes have been modified with the Active column so that it is possible to set a deferral code to inactive and it will not visible in lookups in Purchase invoices, Sales invoices, Cash sales. If it is entered, you will get an error message saying that the deferral code is inactive. The Deferral codes list window (DR2020PL) is changed and it now includes the column Active. You can make a filter using this column. When changing a deferral code to inactive, you will get a message if the code is used on non-stock items, stock items, components on an item, Invoice inbox rules, and unreleased sales and purchase invoices. You have to delete or change the deferral code on all items, components, and Invoice inbox rules and release all sales and purchase documents before you can set a deferral code to inactive. In the Purchase invoice (AP301000), Sales invoice (AR301000), Cash sales (AR304000), Sales invoice (SO303000), Non-stock items (IN202000), Stock items (IN202500), and Invoice inbox rules (AP2060PL) windows, you will not be able to enter an inactive deferral code on document lines. You also get an error message when releasing an invoice if the deferral code is inactive. The list windows for Non-stock items (IN2020PL), Stock items (IN2025PL), and Invoice inbox rules (AP2060PL) also contain the Deferral code field and you can add it to the list. This makes it easy to filter and maintain the code. In the Deferral schedules (DR201500) window, you will not be able to use an inactive code on a new schedule. On existing schedules you will see the inactive code, you can process it, and you are able to change the transactions. In the Release schedules (DR503000), Run recognition (DR501000), Deferral schedule summary (DR401000), and Deferral transaction summary (DR402000) windows, you will get a warning on schedules with an inactive deferral code. It will not stop any pocessing of the transactions. When deleting a deferral code, the same test and dialog will be shown as when setting the code inactive. If there is no item, components, rules, and invoices for this item, the default check if it has been used in a schedule is done and you cannot delete a used code.	🔖	8.29.0
Extended filtering in the Trial balance summary (GL63200S) report	You can now select a from period and to period for the Trial balance summary (GL63200S) report. The purpose is to first choose one financial year to receive the correct ending balance for income and expense accounts. Then you can select a from period and to period for the report.	🔖	8.55.0
Danish template - Correction to the ARM report 'Balance sheet - detailed'	The 'Balance sheet - detailed' report is changed and is using the DBSP3 column set instead of the DBSP4. The row set for this report BALSP is changed and the line 8700 with account class 870 AFGIFTER is set to report by Account.	🔖	8.24 (200623)
Filter options in the Journal reconciliation (GL30201S) window	In the Journal reconciliation (GL30201S) window, there are now filter options in top rightmost corner of the grid.	🔖	8.25 (200908)
Performance improvement in Close financial periods (GL50300S)	The performance in the Close financial periods (GL50300S) window has been improved and closing earlier years will be much faster.	🔖	9.65.0

Reclassify only Transaction description and/or Transaction date	Previously, in the Reclassify transactions (GL506000) window, if you tried to change the Transaction description and/or the Transaction date it was not possible to process the transaction. You had to change either the subaccount or the account in order to make it work. Now, it is possible to change only the Transaction date or the Transaction description to trigger that the transaction gets reclassified.	🔖	8.24 (20062 3)
New P&L report for comparison of actual figures against budget	In version 9.04 was introduced a report for comparison of actual profit and loss figures against budget. The report Profit & Loss with budget deviations (Danish: Opnåelse af budget) with window ID GL63801S will by default be visible in the General ledger Quick menu under Financial statements. It shows, by listing all used accounts in the P&L report structure, columns for actual profit and loss figures, budget figures, and actual budget deviation in base currency and percent.	🔖	9.04.0
SAF-T linked to general transactions with VAT	A functionality is changed in the 'SAF-T report' (TX50600S) window. The old button 'Tax account control details' has been removed and replaced with new button 'General ledger transactions with VAT'. This new button opens the new 'General ledger transactions with VAT' (TX40500S) window. You can also find the window under Menu - More items - VAT - 'Show the full screen' - and in the Inquiries section. This window has the same functionality as the generic inquiry 'GL-Transactions with Tax' in the previous versions.	🔖	F2020 05, Visma. Net ERP Kanba n week 24, Visma. Net ERP Week 24
New columns on VAT report and in processing of VAT report	The Dutch VAT report (TX62105S) is modified and will now contain the supplier reference (Betalignsref.) from the invoice created when closing the VAT report. Two new columns, VAT period and VAT revision, have been added to the supplier document (APInvoice) to be able to print the supplier reference when printing the VAT report. Note! This will only be done for reports closed after the upgrade to the new version, since the supplier document is updated with the report period and revision so that the right value can be found. A new column named VAT revision has been added to the Supplier document tab in the Process VAT report (TX502000) window so you can see by which revision the document was created.	🔖	8.25 (20090 8)
New column Tran. description in VAT account control details (TX40400S)	Due to changes to improve performance, some calculations were removed from the screen to the SQL server. That changed the Description column that had some special calculations to show Transaction description if it has a text and account name if the transaction description was empty. To avoid calculations in the screen, the Transaction description has been added as a separate column and the description only contains the account name. This is also how it works in Journal transactions window.	〰️	9.68.0
Changes in Account details (GL404000) to improve performance	The changes made are how data is retrieved from the database and also on the processing of the results in the screen. Calculation of begin and ending balance for each row was one reason, and now you have to select to calculate these with select the checkbox 'Show beginning and ending balance as well'.	〰️	9.55.0
Changes in Finnish template regarding VAT ID 04 Alv 0% and 05 Vienti/Tuonti alv 0%	There are changes in the Finnish template regarding VAT ID 04 Alv 0% and 05 Vienti/Tuonti alv 0% * VAT zone 03 Ulkomaat (Ei EU) has been removed from VAT ID 04 * VAT category 02 Alv keski% and 03 Alv matala% has been added to VAT id 05 This has been done since this caused a double value of taxable amount when using Category 04 on a customer with zone 03 Note! For existing customers, no changes are made and the the change has to be made by the customer.	〰️	9.36.0

New checks for errors added to EC sales list	New warnings and error handling have been added to the EC sales list (AR40501S), which will prevent you from closing and sending an EC sales list with wrong values. The warnings are checking for the following errors. VAT Registration ID: * Missing VAT registration ID on the customer. * Add VAT registration ID on the customer or deselect the transactions from being reported. Country: If the customer document by mistake has a VAT ID that is defined as an EU report code: * The country on the customer/location is not an Intrastat country. * The country is the same as the reporting company or branch and the customer is then a domestic customer Update the country on the customer or deselect the transaction from being reported.	⩗	9.26.0
Locations on purchase orders not shown correctly on Intrastat report	Earlier, in some scenarios when using locations on purchase orders, the location was not shown correctly on Intrastat report (TX50800S). This has now been fixed.	⩗	8.94.0
The split subaccount segments in inquiries is now implemented for several modules. During testing we see that in coded by programing inquiries, the headers are not translated. In generic inquiries it's possible to translate but not for these ones. A reason can be that language handling is missing for segment keys (subaccount), so there is nowhere right now to add these translations.	The split subaccount segments in inquiries are now implemented for several modules. During testing we see that in coded by programing inquiries, the headers are not translated. In generic inquiries it's possible to translate but not for these ones. A reason can be that language handling is missing for segment keys (subaccount), so there is nowhere right now to add these translations.	⩗	
Account descriptions for 8080 and 8100 with no space and row sets for the accounts with wrong height updated	Accounts 8080 and 8100 in a Norwegian company used . (dots) instead of spaces between the words and that lead to a word-warp in the Profit and loss report where accounts were specified and you got an empty description. The corresponding rows in row sets where these accounts were used had a height of 16 instead of 13 that showed the top of the wrapped account descriptions between the account lines. During upgrade these account descriptions and row set lines are updated so they contain spaces and height 13.	⩗	8.65.0
Improved filtering on Customer /Supplier name in Account details inquiry	In some cases there was a timeout when doing filtering on Customer/Supplier name in the inquiry Account details (GL404000). This has now been fixed.	⩗	8.73.0
New report All unreleased documents with VAT (GL65603S)	To improve the performance of the report All unreleased documenta (GL65601S), the report is now used only to show all unreleased documents. It's available from the menu and linked from the close financial periods windows. The new report All unreleased documents with VAT (GL65603S) is available from the menu and linked from the Prepare VAT report (TX501000) window. This report is only showing unreleased documents with VAT.	⩗	
Performance improvement on Journal reconciliation window (GL30201S)	The performance on the Journal reconciliation window (GL30201S) has been improved.	⩗	9.78.0
Drilldown to the Account details (GL404000) window from reports no longer working	In this version we have fixed the problems with the drill-down to the Accounts Details (GL404000) window that were not working from the ARM reports and Trial Balance (Detailed och Summary). We have also made some visual improvements in Accounts Details (GL404000) window, and aligned the "Manually started search" checkbox to the second column.	⩗	8.46.0
Improved performance in the Balance sheet specification/Open entries report (GL63309S)	In this version, performance improvements were implemented for the Balance sheet specification - open entries (GL63309S) report, which should prevent timeouts when processing the report.	⩗	8.51.0
Improved performance for budget import (GL302010)	An improvement implemented in version 9.02 will reduce the time used for importing budgets in screen GL302010 significantly	⩗	9.02.0

Improvements in SIE file export	Version 8.41 includes improvements in the SIE file export (GL40100S) process, which will result in better performance and reduce the chance of the export process to time out.	〰️	8.41.0
Using purchase price variance account gives wrong VAT in TX40500S	Earlier, when you changed the price of an item on a purchase invoice after it had been received in the Purchase receipt (PO302000) window, the difference was posted to debit/credit on the journal transaction batch for this purchase invoice. These two lines were showing the VAT information from the purchase expense line, total debit/credit 0,00, but the amount did not match the amounts. This has now been fixed so that when the batch is created, the transaction class on the accounting line is marked with an X and not an N so it's possible to detect what line is the change of cost and what is the actual line for the tax base. In the screens and reports using the VAT specification view, the transactions having an X in the Transaction class field will not show any VAT information. Transactions created before this version will not have this value and show VAT information.	〰️	8.39.0
Finnish rowset TASESP used in ARM reports updated	The Finnish rowset TASESP used in some of the balance reports is now updated. Account group 2617 has been added and the accounts 1860-1890 are now grouped into an own summary group in the report.	〰️	8.55.0
Improved performance in Account details window	In this version, the performance in the Account details (GL404000) window has been improved. The queries are now running much faster. In the window, you find a new check box, "Manually started search". We strongly recommend that you select this check box when there is a lot of data that you want to view. You select the filter criteria as usual and then click the "Search" button to see your results. If you do not select the "Manually started search" check box, the inquiry works as before and with improved performance. The search results are shown directly in the window when you have selected your search criteria. This means that a new search starts every time you change a search filter, and it takes more time for the system to show the search results. When working with branches, the system did in some cases not show the correct beginning and ending balance in this window. This has now been fixed.	⚡	8.45.0
Performance improvement for SAF-T report and General ledger transactions with VAT	Some customers have reported timeout when running the SAF-T report (TX50600S) and General ledger transactions with VAT (TX40500S). To fix this, changes have been made for the extraction of the data to perform faster.	🔴	9.82.0
Country filter added in Standard VAT codes	A country filter is added in the Standard VAT codes (CS20500S) window that makes it possible to work with several countries without changing the branch in the selector. When you import from Excel without country it will create the new rows to the selected country.	🔴	9.71.0
Trial balance summary is not showing period when exported to Excel	After version 8.88, the period and some other heading information were missing when exporting the Trial balance summary to Excel. This has now been fixed.	🔴	9.12.0
Cash return with credit amount appears with positive taxable and VAT amount in VAT control screens	Earlier, credit amounts showed the tax amounts with a positive amount in the following windows and SAF-T report: General ledger transactions with VAT (TX40500S) VAT account control summary (TX40300S) VAT account control details (TX40400S) This has now been fixed and the amounts are negative.	🔴	8.90.0
Notes in Process VAT report (TX502000)	When adding a note in the header or on a line in the Process VAT report (TX502000) window, it was not saved after the period was closed. This has now been fixed.	🔴	8.85.0
GET Journal transaction gave an empty response in some cases	For JournalTransactionV2, when using the GET function for Journal transaction, the system in some cases did not read the subaccount and segments correctly and it ended in an empty response. This has now been fixed.	🔴	8.77.0
Incorrect Intrastat details if an order is shipped/invoiced twice	In Intrastat, a kit article showed a wrong net value when it was shipped in two different shipments. This has now been fixed.	🔴	8.47.0

Self-employee report (RF-1301) missing settings	There was an error occurring sometimes when you generated a Self-employee report (RF-1301) (TX50200S): Error: Another process has deleted the 'SigmaSelfEmployeeReportSettings' record. Your changes will be lost. This has now been fixed and was caused by missing settings for Self-employee on the Company or Branch.	🔲	9.86.0
Generating a new RE-1301 report failing	There was an error that prevented you from generating a new RE-1301 report (TX50200S). This was caused by a missing update of the status and that disabled the Generate button. This has now been fixed.	🔲	9.84.0
Prepare VAT report with unreleased document from the reporting period failing	The missing warning of unreleased documents from the reporting period (TX501000) has been fixed and you will get the warning for these documents.	🔲	9.85.0
Warning about unreleased documents in Prepare VAT report	The warning of unreleased documents during Preparing VAT report (TX501000) and you did not find any documents that are balanced or on hold in this period or previous periods has been fixed. That was caused buy supplier prepayments that were included in the selection for the VAT report.	🔲	9.85.0
Changes in General ledger transactions with VAT and VAT account control details now showing inventory return transactions	Changes in General ledger transactions with VAT (TX40500S) and VAT account control details (TX40400S) are now showing Inventory return transactions. Cash management transactions with VAT having gross handling are now showing the correct sign.	🔲	9.80.0
Purchase credit notes with gross vat calculation showed wrong sign in VAT account control screens.	Purchase credit notes with gross vat calculation showed wrong sign in VAT account control summary /details and General ledger transactions with VAT. This is now fixed and are showing a credit note with negative sign in the tax columns. NOTE! Using gross VAT calculation the value in Orig. Taxable amount total will show 0,00 because the value is missing. This column can not be used to summarize the taxable amount so it will show 0,00 in this case.	🔲	
Performance of Account summary improved	The performance of the Account summary (GL401000) window has been improved.	🔲	9.72.0
Calculated VAT rate % was missing in VAT account control summary (TX40300S)	Earlier, the calculated VAT rate % was missing in VAT account control summary (TX40300S) window. This has now been fixed.	🔲	9.70.0
Partially deductible VAT not using expense account from Cash transactions is fixed in VAT account control windows	The duplication of VAT columns when using a VAT code with partially deductible amount where you did not use a fixed expense account from Cash transactions is fixed (in AP301000 and CA304000). The VAT amounts and codes are only showing on the actual expense line.	🔲	9.70.0
Errors in VAT specification report	Earlier, VAT Specification report (TX60050S) did not show account name and showed unwanted NaN value in VAT amount and calculated VAT. These have now been fixed.	🔲	9.68.0
Landed cost creating 3 lines in General ledger transactions with a reference to the same order line	In some situations, Landed cost created 3 lines in General ledger transactions with a reference to the same order line. This caused the VAT to be shown 3 times when it should be shown only on one line. This has now been fixed for the General ledger transactions with VAT (TX40500S) and VAT account control summary/details (TX40300S / TX40400S) windows.	🔲	9.71.0
System internal change breaking import ARM report from template functionality	A system internal change broke the import ARM report from template functionality. An error was thrown while importing and the action was getting aborted. This has now been fixed.	🔲	9.78.0
Wrong report period changing company/branch in VAT control account summary	In a multi-branch company, the VAT control account summary (TX40300S) and detail (TX40400S) windows' changes have been improved: when you change the company, the from and to period are not changed. The financial periods are common for all companies/branches. The error showing the report period from the previews lookup is fixed. Now it shows the report period for the selected company, which means it will be emptied when changing the company.	🔲	9.65.0

Generic inquiry GL-Transactions with tax not showing any transactions	The error in the Generic inquiry GL-Transactions with tax that did not show any transactions has now been fixed.	🔲	9.68.0
Warning on unreleased documents when preparing a VAT report	The warning of unreleased documents when you prepare a VAT report (TX501000) was not working if the document was from previous periods. This has now been fixed and it will give this warning as long as you have unreleased documents up to the selected period. Note! For Dutch VAT report, the warning will appear even if you have checked the Exclude transactions from previous periods.	🔲	9.68.0
No data shown in Account details paging error fixed	The error in the paging handling in the Account details (GL404000) window, which could result in empty screens (no data shown) when the account was changed under paging forward on the screen has been fixed.	🔲	9.63.0
Wrong balances in Account details	The error that caused wrong beginning end ending balances in the Account details (GL404000) window has now been fixed.	🔲	9.58.0
Error in Account details (GL404000) when having empty company	When you deleted a company to view transactions from all companies/branches, you got the error: 'Values can not be null. Parameter name source.' This has been fixed and you are able to view transactions for all branches.	🔲	9.56.0
Error message changed in Purchase invoices with a Module control account not allowing manually entry on invoice line	The error message in the Purchase invoices (AP301000) window, when using a Module control account not allowing manually entry on an invoice line is changed to: "The usage of account NNNN in General ledger transactions is restricted. To allow General ledger postings on this account, please go to window Chart of accounts (GL202500) and select the checkbox in the 'Allow manual entry' column for this account.	🔲	9.61.0
Control account module filtering the account correctly	Selecting the Control account module in Customer and Supplier reconciliation (GL408000) is now filtering Income and Expense accounts according to the module set on the account.	🔲	9.55.0
Inactive accounts are not shown in the lookup	The error introduced when the Module control account was released where all accounts was visible in lookup also the inactive ones. This has now been fixed and you will not see inactive accounts in the lookup.	🔲	9.55.0
Reversed VAT codes are showing correct sign when created in Bank transactions (CA304000)	The Reversed VAT line is now showing the correct sign when it is used in Bank transactions (CA304000) in VAT account control detail (TX40400S) , VAT account control summary (TX40300) and General ledger transactions with VAT (TX40500S) windows.	🔲	9.55.0
Prepayments now included in Customer and supplier reconciliation	Prepayments for customer and suppliers are now included in the Customer and supplier reconciliation (GL408000). The prepayment is not a part of the ending balance column but is stored in the Prepayment column and that is now included in the calculation.	🔲	9.54.0
EC sales list changed to avoid search errors	The EC sales list (AR4050PL) contained aliases that were in conflict with query commands. These are now changed and contain the default table names. This code caused the search function to give an error. If the list has been changed by the customer, this change will not be done, and the aliases will still be BA, BR, OR and EC. It is the OR that is causing the problem and it interpenetrated as the OR in the statement. In addition, the list now contains Tax agency and Tax agency name.	🔲	9.61.0
Access rights to subreports of GL65603S added to more roles	Access rights to the subreports of GL65603S have bee added for the following roles: Financials user, Financials administrator and Administrator roles.	🔲	9.59.0
Unit sets working when Optimize unit set report is not set	The error in ARM reports when using Unit sets without Optimize unitsets report set is now fixed and the selection of different unit set in the report result works again.	🔲	9.45.0
Duplicated lines in VAT account control detail (TX40400S) when having more than one Tax agency	When you had more than one tax agency in the same company and the VAT report lines had the same ID you got the account lines duplicated by the number of Tax agencies in the VAT account control detail (TX40400S) window. This has now been fixed.	🔲	9.46.0
Data collection on Prepare VAT report modified and performance improved	On the Prepare VAT report (TX501000), the way of data collection has been modified to avoid timeout during opening and processing. This will improve the performance when showing and processing the data.	🔲	9.44.0

Account specification (GL63301S) report showing beginning balances for income and expense	Previously, the Account specification (GL63301S) report showed Beg. balance for Income and Expense accounts in beginning of a year. This has now been fixed.	🟧	9.48.0
Swagger documentation updated for LastModifiedDateTime and LastModifiedDateTimeCondition parameters for several endpoints	Swagger documentation is updated for LastModifiedDateTime and LastModifiedDateTimeCondition parameters on the GET methods of the endpoints: Account, Branch, Budget, GeneralLedgerBalanceV2, GeneralLedgerTransactions, JournalTransactionsV2, Ledger, Organization, Vat and VatCategory yyyy-MM-dd yyyy-MM-dd HH:mm:ss yyyy-MM-dd HH:mm:ss.FFF yyyy-MM-ddTHH:mm:ss yyyy-MM-ddTHH:mm:ss.FFF	🟧	9.40.0
Tax invoice date incorrect when financial periods differ from VAT periods	The Date and Due date on the created VAT invoice follows the To date and Due date from the Process VAT report window (TX502000) even if the period is closed or the periods are user defined and not following the end date of the VAT periods Example: Financial period 03-2023 are ending 27.03.2023 and VAT period 01-2023 ending 30.03.2023 This invoice will be posted in Period 04-2023 with the date 30.03.2023 and due date as defined in the Process VAT report window. New warning and error message is added if there is no open periods to post the VAT invoice to.	🟧	9.34.0
Incorrect values in Process VAT report with Show differences selected	In the Process VAT report (TX502000) window, when you selected Show differences, the values on the lines were not correct. You would see the same error when selecting Revision 1 when you had 2 revisions. This has now been fixed and you will get the right value when you check and uncheck the Show differences option or select another revision.	🟧	9.36.0
From and To period fields mandatory in Account specification report	Now, the Account specification report (GL63301S) works and prints all accounts if you leave the From and To account fields empty. From and To period fields are now mandatory since the report was empty if both or one of them was missing.	🟧	9.27.0
Update journal transaction line without account number in Put JournalTransactionsV2	In the Put JournalTransactionsV2 it is now possible to update a journal transaction line without specifying an account number. Also, it is now possible to provide subsets of the subaccount segments; the omitted segments will be left as is.	🟧	9.30.0
Empty revision for multi-branch companies in Process VAT report	The error message "Revision can not be empty" in Process VAT report (TX502000) for multi-branch companies has now been fixed and the last revision is suggested in the window. This only occurred in Dutch companies when you reopened the window.	🟧	9.13.0
Supplier reference missing on Dutch VAT invoices	Earlier, there was an error on Dutch VAT invoices with missing payment reference when the financial period was closed and the invoice was created in the next open period. This has now been fixed and the invoice gets the supplier reference equal to the payment reference in the Process VAT report (TX502000) window.	🟧	9.16.0
Duplicated amounts in Dutch VAT report when having two VAT invoices /credit notes with the same VAT period and revision	Earlier, the amounts were duplicated in the Dutch VAT report (TX62105S) when having two VAT invoices /credit notes with the same VAT period and revision. This has now been fixed and the method of getting the payment reference has been changed.	🟧	9.11.0
Journal reconciliation header not correct when using Deselect all with filter	Earlier, there was an error when you deselected all in the Journal reconciliations (GL30201S) window and the sums went wrong. This has now been fixed and reconciled debit and credit are correctly calculated.	🟧	9.09.0
Intrastat incorrect when using lot /serial number allocated in sales order	The error that doubled the value in Intrastat report when using lot or serial no. items has now been fixed and the correct net amount is calculated on the report.	🟧	9.37.0
Transportation mode not correctly updated in Shipment window when customer is extended to supplier	Earlier, if a customer also existed as a supplier (using the Extend to supplier option in the Customers (AR30300) window), when entering a shipment for a sales order, the transportation mode was not correctly picked from the customer. This has now been fixed.	🟧	9.09.0

Periods showing 0 when distributing budget lines	Earlier, when you refreshed the Budget (GL302010) window after you had entered a budget line and distributed it, all periods showed 0. This has now been fixed.	🔶	9.06.0
Error in processing companies from the source without ledgers	Earlier, in the Consolidation (GL103000) window, you got the error message: Another process has added 'GLConsolBranch'. Your changes will be lost. This happened if the the source had a company without ledgers. This has now been fixed and companies from the source without ledgers will not be processed.	🔶	9.12.0
Search of accounts in From account / To account on Account specification report	In the Account specification (GL63301S) window, you can now search for account number and description. If you have selected an account number in the From column, the search in the To column is limited to search To account not equal or larger than the selected onr in the From account.	🔶	9.16.0
Error saving note on VAT report when rejected by Altinn	Earlier, in the Process VAT report (TX502000) window, if the validation of the tax report got the Report transfer status "Error validating report", it was not possible to add a note to the tax agency. This has now been fixed and you can add a note.	🔶	9.11.0
Row set renumbering option not updating formulas containing line numbers	For companies that have activated the multi-language feature and edited Financial statements reports (ARM), the formulas were language related. If you used the Renumbering function (CS206010), this did not update the formulas and so you ended up having to manually change the formulas. The formulas are not language related, so now this column does not have the language option. It is the System local default language formula that will be used after the language option has been removed from this column.	🔶	9.80.0
Check of on-hold and balanced batches on SAF-T report not considering deleted batches	Earlier, the check of on-hold and balanced batches for the reported period (TX50600S) did not consider deleted batches. So a deleted batch in the period was detected as not released/posted. This has now been fixed and deleted batches are excluded from the test.	🔶	9.01.0
Wrong balances on Trial balance summary report	Earlier, there was an error that caused wrong balances in the Trial balance summary report (GL63200S). This has now been fixed.	🔶	9.37.0
Opening VAT adjustment (TX301000) window when both VAT period and financial period are closed	The problem not being able to open the VAT adjustment (TX301000) window when both VAT period and financial period are closed has now been fixed. You will not get an error and, depending on the setting Allow posting on closed periods in General ledger preferences you will be allowed post it on a closed period or the next open period.	🔶	9.22.0
Count of 14 digits for phone number in EC sales list and VAT Report now includes "+"	The "+" sign is now included and counted as a part of the 14 characters in phone numbers when sending VAT report and EC sales list (AR40501S). If a phone number with the "+" and digits is longer than 14 it will be truncated, and spaces and other characters are removed when sending.	🔶	9.01.0
Journal reconciliations showing reclassified rows even if check box Include reclassified is not selected	Earlier, there was an error in the Journal reconciliations (GL30201S) window that showed reclassified rows even if the check box "Include reclassified" was not selected. This has now been fixed and reclassified rows are only shown if the check box "Include reclassified" is selected.	🔶	9.10.0
Phone number sent to AutoReport for the EC sales list report now fits within the maximum of 14 characters	The phone number sent to AutoReport for the EC sales list report (AR40501S) is now trimmed for spaces and charters to fit within the maximum number of 14 characters. There is no warning if the phone number is more than 14 numbers. 020 - 123 45 678 will be 02012345678 +31 20 123 45 678 will be +312012345678	🔶	8.98.0
Setting VAT reporting type to new multi-branch companies	Earlier, in a Multi-branch company with more than one company, a new created company used the VAT reporting type from the first company and not the Tax agency supplier. This has now been fixed so that for a new company the system uses the settings on the tax agency for the first tax year and for the next year it uses the setting from the previous year.	🔶	9.06.0
Correct company name on Norwegian VAT report when changing company	The Norwegian VAT report for 2022 (TX62106S) has been changed so that the company name is now correct when printing it from different companies.	🔶	8.96.0

VAT Adjustment on prepared VAT report were not included in the XML	Adjustments done on the VAT report was not included in the XML file sent to AutoReport. This is now fixed and the changes are included in the XML file. Customers who created the VAT report before 8.91.00.1008 and have done a VAT adjustment, should control the amounts in the XML file against the screen. Open Process VAT report (TX502000), select tax agency and reporting period. Click Reports -> Download XML file. Check that <fastsattMerverdiavgift> and the adjusted <mvaKode> have the same amounts as the VAT report in Visma.net ERP. You can also check the VAT report in Altinn against the screen in Visma.net ERP. If values are wrong and the report status is "Prepared", void the VAT report and prepare it again. If values are wrong and the report status is "Closed", please contact support.	🔶	8.91.1
Fix in the VAT XML file sent to AutoReport for companies with branches and the "File tax by branches" option checked	In some cases the XML file sent to AutoReport or Downloaded did not contain any values only the heading when the company had branches and the "File tax by branches" checked this is now fixed and can easy be tested by run Report / Download XML file. It should contain the values from the screen.	🔶	8.91.1
VAT report not handled correctly with the Use the financial period end date as VAT period setting on	Earlier, the setting for using financial period's end date instaed of transaction date from the documents as tax date did not work for all processes. The following fixes have been done: - Prepare for closing (AP50700S) updates the financial date and period on VAT transaction when it is processed. - VAT periods (TX207000) calculates the unreleased net VAT amount correctly in multi-branch companies. - For some reason, some VAT transactions got the wrong financial period compared to the financial date and were not processed correctly when the VAT period was before the financial period. The Prepare VAT period window showed the transaction but it was not processed. Then, if you processed this period again, you got processed twice and got a new tax invoice and duplicated general ledger transactions. This has now been fixed.	🔶	9.07.0
Show reporting periods only for the selected company in AutoReport status and General ledger transactions with VAT windows	Earlier, there was an error in the lookup of reporting periods that showed the reporting periods for all companies. Now the lookup in From and To reporting period fields in the AutoReport status (TX50500S) and General ledger transactions with VAT (TX40500S) windows shows the reporting periods only for the selected company.	🔶	8.95.0
Amount to pay/claim in the Norwegian VAT report 2022 showing 0,00	Earlier, there was an error where the amount to pay/claim in the Norwegian VAT report (TX62106S) 2022 showed 0,00. This has now been fixed and the correct amount is shown.	🔶	8.91.0
"Skip headers" in Import by scenario window renamed to "Include headers"	The check box "Skip headers" in the Import by scenario (SM206036) window has been renamed to "Include headers" to accurately describe the functionality of the check box.	🔶	8.92.0
Supplementary VAT report not including revisions higher than revision in the processed period.	Earlier, the supplementary VAT report did not include revisions higher than the revision in the processed period. So if the revision is 2 in the current reporting period and you had higher revisions in any of the periods between the first reporting period and reporting period, values for these revision higher than 2 were not included. This has now been fixed and all revisions for the selected periods are included in the supplementary report.	🔶	9.18.0
Company name on Norwegian VAT report	Changes have been made to the Norwegian VAT report (TX62106S) to make sure it uses the correct company name in the report.	🔶	8.91.0
Norwegian VAT report validation errors updated when corrected and validated again	Validation messages on the report lines for a Norwegian VAT report done in 2022 are now deleted and new messages are added when you run a later validation or have sent the report successfully to Altinn.	🔶	8.90.0

Validation of MVA kodes having specification lines updates the wrong line	Earlier, there was an error updating the wrong report line when the message was for one of the specification lines like "TAPPÅKRAV", "JUSTERING", "TILBAKEFØRING", or "UTTAK". These lines had the same MVA kode as the normal VAT code and various other messages that made it impossible to find the correct line. A line reference from the sent report was found in the tagg <stiTilAvvik> so the right line is now updated with the error message.	🔲	8.91.0
Norwegian VAT codes for withdrawal (3U, 31U, 32U, 33U, 5U) corrected	The specification for the withdrawal VAT codes is corrected from utakk to uttak and will be validated correctly when sent to Altinn.	🔲	8.89.0
Lookup from Process VAT report opening VAT report details open with correct company/branch	Earlier, in a multi-branch company when you clicked on an amount in the Prepare VAT report (TX501000) window, the VAT details window opened with the company selected in the Company selector. This has now been fixed and it opens the window with the company/branch from the Process VAT report (TX502000) window.	🔲	8.89.0
Report status in Process VAT report not updated when changing branch	Earlier, there was an error where the reporting status was not updated when changing branch in the Process VAT report (TX502000) window. This has now been fixed and the status for the selected branch is not the first selected branch for the company.	🔲	8.92.0
VAT reporting group for VAT ID 12T corrected for upgraded Norwegian customers	Earlier, the new VAT ID 12T was using a wrong reporting group for 11T. This has now been fixed and updated for all customers having that error.	🔲	8.89.0
Improved performance of ARM reports for companies with large number of branches	Earlier, when generating ARM reports in a company with a large number of branches, a timeout error message could occur. This has now been fixed.	🔲	8.87.0
Wrong button activated in Release VAT report when closing VAT period	Earlier, there was an error in Release VAT report (TX502000) window when closing the VAT period. The Resend button got activated instead of the Send button. This has now been fixed.	🔲	8.86.0
New Report button clickable in Process VAT report window	You can now click the new Report button in Process VAT report (TX502000) window anywhere on the button and the drop-down list will appear correctly.	🔲	8.91.0
Company/branch name added to the Norwegian VAT report	When printing the new 2022 VAT report for Norway (TX62106S), the name of the company or the branch is now included in the report.	🔲	8.86.0
Error message in validating/sending a report again due to previous validating/sending returned with error	Earlier, there was an error sending a Norwegian VAT report for 2022 where corrections had been made due to missing information and no values had been changed. This has now been fixed and the report can be validated or sent/resent again without the error. The message was: Posten oppdaterer "SigmaGovPortalReort" resulterte i minst en feil. Kontroller feilene. Avvist av Altinn.	🔲	8.90.0
General ledger transactions with VAT showing unposted transactions correctly	Earlier, General ledger transaction with VAT (TX40500S) contained an error when transactions were released but not posted and these transactions were included when the Posted transactions check box was selected. This has now been changed so that transactions with the Not posted status will only be displayed if you uncheck this column.	🔲	8.85.0
Validation of the new VAT report for Norway	Validation and sending the new VAT report 2022 for Norway had been implemented and you can now validate a prepared report before closing the report and it will only be validated, not sent. When sending, it will also be validated and only reports that are validated successfully will be sent to Altinn. The authentication in AutoReport has been changed and the SMS verification has been replaced with MinID and BankID.	🔲	8.84.0
Changed notes in Process VAT report (TX502000) not correctly saved	Earlier, when adding a note to the Tax Authority in the Process VAT report (TX502000) window and afterwards removing the note, it was not correctly saved and handled during sending of the report. This has now been fixed.	🔲	8.86.0

VAT IDs for Loss on claims updated with correct account for sales	VAT IDs for Loss on claims are updated with the correct account for sales and are handled with the same accounts as for purchase. 0T has changed from 2700 to 2710 1T has changed from 2701 to 2711 11T has changed from 2703 to 2713 12T has changed from 2703 to 2713 13T has changed from 2704 to 2714	🔲	8.84.0
Norwegian VAT report 2022 (TX62106S) is printable when it's prepared	Earlier, it was possible to print the VAT report (TX62106S) first when it had been validated or sent to AutoReport. Now you can print the VAT report when it has prepared.	🔲	8.86.0
Error message from Altinn when sending VAT report and error file as attachment on AutoReport status	The error message from Altinn when sending a VAT report having errors is now working and you will get the error file as an attachment to the AutoReport status. In addition, you see the error messages in a text box and the errors referring to a VAT code are also shown on each line in the Message column. The receipt attachment will also be attached to the AutoReport status line.	🔲	8.88.0
Company name in the Norwegian VAT report for 2022 and printing in a multi-branch company	In the Norwegian VAT report (TX62106S) for 2022, company name is added after the Corporate ID. The bug in printing of this VAT report for a company with branches balancing and with File VAT by branch selected has also been fixed.	🔲	8.87.0
VAT ID 32U removed by the authorities	VAT code 32U "Mva pliktig uttak fisk og maritime viltlevende ressurser" was implemented together with the new VAT report for Norway 2022 and is now not valid as code. The code has not removed, the VAT category has just been set inactive and the VAT ID has been suspended from 02.11.2021. The report lines are disabled by update of the From and To VAT period to 202200.	🔲	8.83.0
Rounding on Dutch VAT report causing rejection in AutoReport	When a VAT adjustment was done on a VAT report (TX501000), the existing rounding amount created for the report was deleted by the VAT adjustment process. The sum values were not calculated correctly due to the missing rounding. That caused in many cases errors in the report and AutoReport rejected the report. This has now been fixed and the rounding is not deleted.	🔲	8.93.0
Error in opening and closing balances for some accounts in SAF-T report	Earlier, when reporting SAF-T with only one or two periods in the middle of the year, the opening and closing balances were wrong on accounts that only had a movement with one of the subaccounts. Then it showed only the opening and closing balance for that account/subaccount combination. This error has now been fixed and the opening and closing balance are correct for the selected period (s).	🔲	8.90.0
Note to tax agency in Sweden when processing VAT report (TX502000)	When processing a VAT report in Sweden there was a note to the tax agency with the text "Korrigering av moms" (Correction) for the first report with Revision 1. It should only be included in Revision 2 and higher. This has now been fixed.	🔲	8.86.0
Changes in Norwegian VAT exempt VAT codes	Earlier, the VAT codes 20, 21, 22, 51 and 52 were configured as Include in VAT taxable total. Now they are changed to Include in VAT exempt total. The VAT was reported correctly but on sales invoice documents it was not displayed correctly regarding the taxable and exempt total amounts. This has now been fixed.	🔲	8.80.0
Changed VAT accounts for some Norwegian VAT codes	For Norwegian VAT configuration 2022, some of the VAT codes (TX205000) on the General ledger accounts tab did not include the correct and logical accounts. For users that have not done changes to their own VAT accounts, this has now been updated for the following VAT codes: 0T, 13, 13T, 22, 31, 31U, 32, 32U, 33, 33U, 51, 52 and 5U. If it's related to, for example, high VAT, the accounts are now also the ones for high VAT. Users can still change these accounts as preferred.	🔲	8.79.0
Error in Account details window	In the Account details (GL404000) inquiry, some users got the error messages "Input string was not in a correct format" and "Value was either too large or too small for an Int32.". This was related to the format of the customer/supplier ID. This has now been fixed with a new column Customer/Supplier name.	🔲	8.77.0
Transaction type in Voucher details inquiry (GL40601S)	When creating a sales invoice, making a reclassification of the batch and running the Voucher details inquiry (GL40601S), the column Transaction type showed Purchase invoice instead of Sales invoice for the reclassification batch. This has now been fixed.	🔲	8.82.0
Validation for NL VAT report when using revisions and multiple tax agencies	When using more than one tax agency and creating VAT report revisions in the Process VAT report (TX502000) window, there were in some cases a calculation error, not related to rounding. It was not possible to send the VAT report because of a failing validation from AutoReport. This has now been fixed.	🔲	8.83.0

Descriptions for VAT codes (TX2050PL) missing when multilanguage is activated	When multilanguage was activated through license and languages were set up in System locales (SM200550), the description of the VAT codes (TX2050PL) were empty. This has now been fixed.	🔲	8.80.0
VAT category 5 not working with VAT zone 02	The link to TaxZone 05 and 02 from TaxID 6 was removed in version 8.76 of Visma.net ERP. It has now beens added back with scripts.	🔲	8.77.0
Validate Norwegian VAT report in Process VAT report (TX502000) before sending	From version 8.84 on, there is a new status for Norwegian VAT report. When a VAT report is sent for validation, the report status is "Validation requested". This is applicable only for Norway.	🔲	8.84.0
Import of journal transactions with reference number in import scenario	When importing journal transactions (GL301000) with an import scenario, when the reference number was set to a different number than the batch number, the reference number was still set to the batch number. This has now been fixed and the reference number is set from the import scenario.	🔲	8.84.0
Balance and drilldown related to Account details (GL404000)	When you opened the Account details (GL404000) inquiry and added an account in filtering, the balances were not shown correctly before refreshing or updating the window. This has now been fixed. When doing a full drilldown from Balance and Profit & loss reports (ARM reports), via General ledger details (CS600000) to Account details (GL404000), the rows did not contain any data in the inquiry. This has also been fixed.	🔲	8.78.0
General ledger transactions missing in the Voucher details inquiry (GL40601S)	Transactions for the workspace General ledger were first shown in the Voucher details inquiry (GL40601S), but after any change in the screen, for example in filtering or doing an export to Excel, these transactions were missing. This has now been fixed.	🔲	8.77.0
Format of phone number sent to AutoReport for VAT report	The phone number sent to AutoReport for the VAT report is now trimmed for spaces and charters to fit within the maximum number of 14 characters. There is no warning if the phone number is more than 14 numbers. 020 - 123 45 678 will be 02012345678 +31 20 123 45 678 will be +312012345678	🔲	8.92.0
Improvements and bug fixes in the Account details (GL404000) inquiry	Earlier, drilldown from the Trial balance detailed (GL632500) report gave an error. This has now been fixed. The column Customer/Supplier ID showed an unexpected ID. Now the ID that is visible in the registers is shown. When using manual search, changing the period filter and doing a new manual search, the balances were incorrect. This has now been fixed. In some situations, there was an error saying that the maximum parameters of 2100 was reached. This has also been fixed.	🔲	8.77.0
Balances in Trial balance summary report (GL63200S)	Earlier, the line with the total summary of all the beginning and ending balances in the Trial balance summary (GL63200S) report was not correctly calculated. This has now been fixed.	🔲	8.85.0
As an accountant for a Swedish company I must be able to send the first tax report without comment and be able to remove the text "Korrigering av moms" if the report has to be resent or corrected before uploaded to Skatteverket.	The Comment in Process VAT report (TX5020) for Swedish VAT report has changed name to Note to Tax agency and are now editable for the second sending of a report. As soon as the first report is sent to AutoReport the comment will be suggested to "Korrigering av moms" same function as before if you resend a report this comment was added to the report. If the revision 2 or higher it will always suggest the text. New now is that the column is editable so if the previous sending never was uploaded to Skatteverket you can now remove the comment and the report will be sent as a new report.	🔲	8.73

Five new variables in ARM reports to get organisation or branch name and corporate ID	In ARM reports, there are 5 new variables to use in the Column set headings to get the organisation or branch name and corporate ID. =Report.GetOrganizationNameFromId(organizationId): where you replace the organizationId with @Organisation, will return the selected company and it must be used together with request for company. If the request is off, it returns the main company name. =Report.GetBranchName(branchId): where you replase branchId with @StartBranch or @EndBranch, will return the requested branch corporate ID. If the request is off, it returns nothing. =Report.GetOrganizationNameFromBranch(branchId) where you replace branchId with @StartBranch ore @EndBranch, will return the company name for the branch =Report.GetCorporateIDFromBranch(branchId): where you replase branchId with @StartBranch or @EndBranch, will return the requested branch corporate ID. If the request is off, it returns the active branch corporate ID. =Report.GetCorporateIDFromOrganization(organizationId): where you replace organizationId with @Organization, will return the requested company's corporate ID. If the request is off, it returns the active branch corporate ID. Existing customers using multi-branch have to update the column set they use to get the new methods in the formulas. These are the formulas used in new created companies Update company name so it prints the selected =IIf(@Organization>'0',Report.GetOrganizationNameFromId(@Organization), IIf(@StartBranch>'0', Report.GetOrganizationNameFromBranch(@StartBranch), Report.GetDefUI('RowCompanyBAccount. AcctName'))) Update corporate ID so it print branch ID/name or company corporate ID =IIf(@EndBranch > '0' and @StartBranch <> @EndBranch, 'Branch ' + @StartBranch + ' - ' + @EndBranch ,IIf(@StartBranch > '0' and @StartBranch = @EndBranch, Report.GetBranchName (@StartBranch), 'Corporate ID: ' + Report.GetCorporateIDFromOrganization(@Organization))) Add corporate ID for branch =IIf(@Organization> '0' and @StartBranch <> @EndBranch, 'Corporate ID: ' + Report. GetCorporateIDFromOrganization(@Organization), IIf(@EndBranch > '0' and @EndBranch <> @StartBranch, 'Corporate ID: N/A' , IIf(@StartBranch > '0' and @StartBranch = @EndBranch , 'Corporate ID: ' + Report.GetCorporateIDFromBranch(@StartBranch),' '))) Replace corporate ID and branch with your local language.	🔲	9.05.0
Incorrect filtering when using links from the inquiry Account summary	The inquiry Account summary (GL401000) includes the buttons Account details (GL404000), Account by subaccount (GL403000) and Account by period (GL402000) at the top. When working with branches and clicking these buttons, the filtering was incorrect. This has now been fixed. Other additional performance improvements and corrections have also been done to the same window compared to the release in version 8.70.0. They are related to how data is retrieved and corrections of filtering segments as a part of the subaccount string.	🔲	8.71.0
Fix on customized ARM reports	In version 8.69, customers that were having customizations on their ARM reports were getting wrong results when it comes to supporting the symbol display option, while standard reports worked as expected. The issue is now fixed also for customized reports.	🔲	8.69.1
Wrong amount in information text in Prepare VAT report window	In the Prepare VAT report (TX501000) window, calculation of the value for amounts from the previous period in the heading message is now correct; also when using the financial period end date as VAT period, not document date on tax agency checked.	🔲	9.07.0
Fix on Account specification report for multi-branch companies	For a multi-branched company, using the Account specification (GL63301S) report without any branch specified in the filter resulted in an syntax error. This has now been fixed.	🔲	8.69.0
Subaccount filter only show transactions matching the selected subaccount in Account specification report	The error where the subaccount filter did not work in the Account specification (GL63301S) report has now been corrected, and the report contains only the transactions with the selected subaccount. NOTE! You cannot select only on a segment, you must fill out the whole subaccount string.	🔲	8.69.0

Fix on posting partly deductible tax	The error getting the expense account correct when partially deductible VAT rate was set to 0,00% is now fixed and the posting does not end up on the defined rounding account but on the lines expense account or the defined account on the VAT Id.	🔶	8.69.0
Deferral description on journal transaction	In earlier versions, when you created a deferral schedule (DR201500) for a posted purchase invoice (AP301000), the transaction description from the invoice was not pushed to the description field on the Jjournal Transaction screen (GL301000) when processing the transaction for respective Schedule on the Run recogition screen (DR501000) This has been fixed in version 9.29 In addition we added a new field, Transaction Description , in the top section of the Deferral schedule screen DR201500, which enables the user to enter an alternative description text for all open transactions of a deferral schedule	🔶	9.29.0
Description of codes in VAT (TX205000) supporting 100 characters	Earlier, there was a limitation of 60 characters in the VAT description. This has now been fixed so that it is 100 characters.	🔶	8.77.0
Performance improvement in ARM reports	Improvements have been made related to how data is retrieved for Profit & Loss and Balance reports.	🔶	8.88.0
Wrong from and to account in General ledger transactions with VAT	Earlier, when selecting a from and to account in the General ledger transactions with VAT (TX40500S) window, the system used the account ID and not the account CD. This has now been fixed, and the account CD is now used in the selection.	🔶	8.63.0
Change on what invoices are shown in Process VAT report (TX502000) window	In the Process VAT report (TX502000) window on the Supplier document tab, there is a change regarding what invoices are shown. VAT invoices posted in the next open period because they were created after the financial period was closed and "Allow posting on closed period" was not set in the general ledger preferences are now shown in the VAT period where they were created. Manually created invoices for the tax agency are shown according to the document date corresponding to the VAT period from and to date. In addition, the supplier reference is added to the invoice line so it's easy to see that the payment reference number from the reporting period is correct on the invoice.	🔶	9.14.0
The error when splitting transactions using Reclassify transaction is fixed	The error when splitting lines in the Reclassify transactions (GL506000) window introduced June 22, 2021, where the base amount became 0,00 has now been fixed. You can now split lines in base currency and with other currency. It's only lines created from payments with currency gain/loss where the amount in currency is 0,00 debit and credit that can not be splitted. NOTE! If you need assistance to make corrections on transactions with this error, contact Support.	🔶	8.58.0
SAF-T included unposted transactions at transaction level but not in account balance	Earlier, there was an error in sending unposted or balanced transactions in the SAF-T file for Norway. This has now been fixed and these transactions are excluded from the report. You will now get an error message that you have unposted and/or balanced transactions and you have to process them. You can download the file with these transactions but sending to Altinn will not be possible before the unposted transactions are processed and the balanced batches are released, deleted, or moved to another year/period.	🔶	8.88.0
Link on account to follow the From period/To period filter fields in Trial balance summary	There was an error when selecting the From period earlier than the current period and To period equal to the current period. Then the link in the Trial balance summary (GL63200S) report to Account details suggested only one period. This has now been fixed and it will use the same from and to period as selected in the report.	🔶	8.56.0
Error message in Account details when Include reclassified check box selected	Earlier, you got an error message when you selected the "Include reclassified" check box in the Account details (GL404000 window). It has now been fixed.	🔶	8.72.0
Reclassify all from Account details window	The error where Reclassify all did not open with any transactions from the Account details (GL404000) window has now been fixed and all transactions from the window will appear in the Reclassification window.	🔶	8.59.0
Copy original file attachments and notes to correction transactions when reclassifying transactions	Earlier, file attachments and notes were not copied to correction transactions. This has now been fixed. When you reclassify transactions that have file attached or a note, the new created transaction and correction transaction will get the same note and file attached. So, you are able to see the documents and notes that were added to the original transactions on the corrected transactions.	🔶	8.59.0

Missing translation in SIE import (GL40101S)	The error message in SIE import (GL40101S) is now correctly translated when using Swedish as user language.	🔲	9.24.0
Customer number on expense and income accounts for customer write-off transactions in SAF-T file	If you had Customer write-off transactions, the SAF-T file contained the customer number on the expense/income account in addition to the customer ledger account. This created an error between the customer balance and transactions. This has now been fixed and only the supplier ledger account contains the customer number.	🔲	8.51.0
Quantity handled with correct sign on automatically reversed batch	In the Journal transactions (GL301000) window, the Quantity column on a batch that has automatic reversing set, is now posting the quantity correctly with the opposite sign in the reversed batch.	🔲	9.22.0
Non-stock kit and Intrastat reporting	Earlier, there were issues with reporting non-stock item kit components on Intrastat report (TX50800S). This has now been hidden behind a feature toggle and is not visible to the users yet.	🔲	8.84.0
Wrong behaviour in Account details when changing column setup and using notes and attachments	Earlier, in the Account details inquiry (GL404000), the lines disappeared when changes were done in the column configuration. When clicking on a note, the yellow icon got white and the note disappeared. When clicking on an attachment at line level, they all showed the same link. These issues have now been fixed.	🔲	8.49.0
Wrong mapping of standard account ID on transactions in SAF-T file	Earlier, mapping of the standard account ID in the SAF-T file was also applied to the transactions and on the transactions, the original accounts are the accounts that should be used. The public code 1 from the chart of accounts shall only appear in the GeneralLedgerAccounts/Account StandardAccountID. This error has now been fixed and the transactions are using the original Account ID.	🔲	8.49.0
Some errors in Dutch Audit file fixed for trLine segment	The order of fields and wrong values in Dutch Auditfile have been corrected for the \<trLine\> segment and are following the tax authorities * The fields changed are \<custSupID\> and \<invRef\> * The fields \<amnt\> and \<curAmnt\> contained an invalid value: xsi:nil="true" which is now removed.	🔲	8.61.0
Wrong balance in the inquiry Account details when using Show summary and navigation to previous and next record	The beginning and ending balance in the header of the Account details (GL404000) inquiry was wrong for negative amounts when using the Show summary option. The same balances were wrong when using the navigation to view the previous or next record. This has now been fixed.	🔲	8.47.0
Change EC sales list report type without changing VAT period statuses	When you changed the EC sales list report type in the VAT periods window (TX207000), an error changed the status on closed and prepared VAT periods, which resulted in errors when you prepared and closed VAT reports. This has now been fixed, and changing the EC sales list report type does not change the VAT periods.	🔲	8.47.0
SAF-T report when main company is set to File tax by branch	Earlier, there was error when opening SAF-T report (TX50600S) if the main company was of company type "With branches requiring balancing" and had the "File VAT by branch" option set. This has now been fixed and it is possible to open the window when a branch from this company is the active branch.	🔲	8.99.0
Encoding UTF-8 in the heading of S AF-T file	Earlier, encoding was missing in the header of the SAF-T file. It has now been fixed so that it contains encoding ="UTF-8".	🔲	8.46.0
Error message when printing unreleased documents (GL50300S)	You can now check for unreleased documents for the entire year or the last period of the year even if the next years periods are not created. No error message will be given.	🔲	9.26.0
Deferral codes and schedules generates the transaction to the first open period if the period backwards in time is closed	When using deferral codes (DR202000) with the start offset backwards in time and when the financial period backwards in time was closed during the run recognition (DR501000), the system used the transaction/recognition date for the document created in the deferral schedule (DR201500). Example: An invoice was created in February with start offset -1 (January). When running the recognition in March, the financial period for January was closed. The system created the transaction in March. This has now been fixed so that the system generates the transaction in the first possible open period, February in this example.	🔲	8.51.0
The Branch column showing incorrect value in AutoReport status window	Earlier, the display of branch in the AutoReport status (TX50500S) window showed the key and not the Branch CD. This has now been fixed and you see the same values as in other windows.	🔲	8.98.0

Clipboard button removed from EC sales list	The Clipboard button is removed from the EC sales list (AP303000) because you could not use the function in the window.	🔲	9.27.0
See all unreleased documents that stop the close financial periods process	If there was an open credit note you had matched against an invoice in the Supplier payments (AP302000) or Customer payments (AR302000) window, but not released the matching, you could not close the period. The report Unreleased documents (GL65601S) did not show this open matching since the status of the credit note and invoice was Open and it was released. This has now been fixed and you will see the matched credit notes that are not released in the Unreleased document report.	🔲	8.44.0
Correct fiscal entity on EC sales list when multi-branch is used (NL)	For Dutch users, the new EC sales list did not get the correct VAT reg. no from company and branch when you wanted to report on branch level for Omzetsbelastungnumber and VATIdentificationNumberNLFiscalEntityDivisjon in the file sent to AutoReport. This has now been fixed and the VAT reg. numbers are selected correctly as in the old EC sales list. With the check boxes in the Organisations (CS101500) window selected: File EC sales list by branch -> used VAT reg. no from company and branch File EC sales list by branch + File tax by branch -> Only VAT reg. no from the branch is used	🔲	8.43.0
Transfer adjustment period 13 in consolidation	As an accountant I want to get all periods consolidated also the adjustment period. Earlier, the adjustment period 13 was not imported to the consolidation company. This has now been fixed and the period is now included. If To period is not set, only the current period is included and periods in the future are not included. Then you have to set the To period to a wanted period in the future.	🔲	8.44.0
Workspace and Transaction type now showing translated values in VAT report details	The columns Workspace and Transaction type are now showing translated values in the VAT report details (TX502010) window. Earlier, they showed the codes from the database.	🔲	9.25.0
Error in workbooks when using unexpected setting in number series	In earlier versions, when you tried to use a number series with 'New number symbol' (in Number series CS201010) set to something different than '<New>' in workbooks for sales invoices, it was not possible to add new invoices. This has now been fixed.	🔲	8.42.0
Remove hypens, spaces, and special characters from VAT numbers for EC sales list	Now when a VAT registration number contains spaces or -/. these characters will be removed when it is sent to AutoReport. DK 12 34 56 78 will be DK12345678 or 12345678 SE 12345-67890-12 will be SE123456789012 or 123456789012, depending on the country it is meant for.	🔲	8.42.0
Transactions missing in EC sales list when File VAT by branch was set on the company	Earlier, there was an error in the EC sales list (AR40501S) and it showed nothing when the company had activated the File VAT by branch option. This has now been fixed and you can use the new EC sales list when the option File VAT by branch is activated in the company. NOTE! This might be changed when File EC sales list by branch is impemented	🔲	8.41.0
The Correction period column in EC sales list is now read only	Earlier, in the EC sales list (AR40501S) window, on the Report tab, the Correction period column was editable. This has now been fixed and the column is read only.	🔲	8.41.0
Report EC sales list for more than one tax agency	The new EC sales list did not support more than one tax agency as the old EC sales list did. This has now been fixed and you can report to more than one tax agency for a company. You have to run a tax report or save the tax period for the company and tax agency before you can use it in the new EC sales list.	🔲	8.47.0
Enable correction for previous months for EC sales list (NL)	Option Enable correction for previous months has been set on all Dutch companies during upgrade to 8.41 on the Tax agency settings tab in the Suppliers (AP303000) window. So the new function for EC sales list reporting (AR40501S) separately with the previous periods is activated.	🔲	8.41.0
Changed VAT code on Non-stock item 5 - Betalingsvarsel to code 7 for Norwegian companies	For Norwegian companies, the Non-stock item 5 - Betalingsvarsel has been changed to automatically use the VAT code 7 instead of 6, so the values will not show up on line 1 in the VAT report. This will only affect new companies created in version 8.40 or later. Existing customers have to make this change manually.	🔲	8.40.0
Intrastat location for dispatch	Earlier, there was an issue with location and dispatch for Intrastat. Now, if the location is in the EU for a dispatch, it will be collected in the Prepare intrastat (TX50800S) window.	🔲	8.77.0

Error in detailed ARM reports when using swap liability/expense	Earlier, there was a bug in detailed ARM reports when using Swap liability/expense. It has now been fixed so that expenses that are posted as debit will show as negative values and liabilities that are posted as credit will show as positive values. Reports that did not have an account or a subaccount specification were correct.	🔲	8.39.0
Error in EC sales list in total sums	If the report transactions had one or more transactions with customers marked as excluded from the EC sales list (AR40501S), the value from this was included in the total sums for the different report codes. This was recalculated when you saved the changes. This has now been fixed so that when you select all on the Transactions tab, the excluded customers' transactions will not be included in the total sums.	🔲	8.41.0
RC type orders in Prepare Intrastat window	The RC type orders are now working correctly again and the returned stock items and they appear in the Prepare Intrastat (TX50800S) window as well.	🔲	8.52.0
Fix for number series used in customer ledger workbooks	In version 8.34, an error was introduced which made it impossible to use the voucher number series created for workbooks (GL107500) in the Customer ledger workspace, which are using the sales invoice form when the default number series for this form (ARINVOICE) had the Manual numbering option (CS201010) selected. This error has now been fixed and the number series used in workbooks for sales invoice entries will no longer be affected by the setting in the default number series.	🔲	8.41.0
ARM reports now filter on branch	ARM reports has been modified and are now selecting only the selected branches if the Report have activated the From and/or To branch in the report. This will speed up the report when you select a branch or range of branches. If you have only activated From branch it will only select the selected branch. When you have activated both From and to branch it will select the range. The branch column is alphanumeric so we have made a change so it check the length and not include longer values. Alphanumeric selection from 1 to 9 will normally include 11, 111, 2, 22, 3, 9. This is changed to only select the length of the to branch, so in this case only 1,2,3... and 9	🔲	8.38.0
Improved visualisation of large amounts in several windows	Companies using very large amounts have in some cases not, because of lacking space, been able to see the full amount in coded summary columns in the headers of windows. Now 14 digits + 2 decimals are supported in the areas General ledger, Currency management, VAT and Deferred revenue.	🔲	8.73.0
SIE export file balancing all #VER if Split voucher on different date is in use	Earlier, it was possible to create a journal transaction with different reference numbers on different lines. So they were not balancing and this caused an error in the SIE file (GL40100S) when you used the Split voucher on different dates function. This function splits on reference number and date, and if a reference number does not balance, the next #TRAN will be included in the #VER until it balances. So it is not possible to create a #VER that is not balancing.	🔲	8.44.0
Adjustments appearing on Intrastat report	If updating the price on a stock item on a purchase invoice and an automatic adjustment was created, the adjustment transaction showed up on the Intrastat report (TX50800S). This has now been fixed.	🔲	8.35.0
VAT report payment reference incorrect when VAT period 01-YYYY starts in another month than January	The calculation of payment reference for VAT report (TX501000) is now calculating month and calendar quarter correctly when the first VAT report period is different from 01.01.YYYY. Note! Quarter period starting from the 2nd or 3rd month of the calendar year is not supported. You will get a warning if the company has these VAT report periods.	🔲	8.63.0
Error in sending of VAT report: Value of 'Telefoonnummer contactpersoon [DeclarantTelephone NumberContactSupplier]' is not valid.	After the release of version 8.31, sending of VAT report failed for Dutch companies with the error: Error on send VAT report: Value of 'Telefoonnummer contactpersoon [DeclarantTelephoneNumberContactSupplier]' is not valid. The issue has now been fixed.	🔲	8.31.1
Period format in SAF-T changed from Year-Period to Period	The format of the period tag in the SAF-T file is changed from year-period (6 digits) to period (1-2 digits) If adjustment period is in use, this period will be reported as period 13. Long accounting year will also use the actual period so that the report can contain more than 12 periods.	🔲	8.44.0

SAF-T file error fixes	The errors in the SAF-T file have been fixed as follows: Customer transactions and customer balance did not match. The reason was that the Customer account 1500 in some cases contained a different TranClass and was not having the customerID. Supplier transactions and supplier balance did not match. The reason was that postings on the rounding account contained the supplier ID and was then included in the calculation of the supplier balance. VAT postings in General ledgers contained VAT information on the VAT account. This has now been fixed and the VAT accounts 27XX will not contain VAT Information. If VAT registration ID is missing on the company, the corporate ID will be used. The Contact person segment will be skipped if there are no values to report on suppliers and customers. The batchID will be removed from the file because it should only contain the batch ID from a external system.	🔴	8.33.0
VAT ID 16 LOW Norway changed from 12% to 6%	The VAT IDs 12L, 16, 17L, and 5 are still 6% and for new companies created in 8.35 the values are 6% for the lines dated 01/11/2020. For companies created before this version, you have to make this change from 12% to 6% manually.	🔴	8.35.0
Duplicate column name and sorting in Journal reconciliation preferences	The duplication of the column Reconciliation ID in the Journal reconciliation preferences window in Norwegian companies has been fixed and the columns have been given new names. The primary key is named "Reconciliation primary key" and the Setting CD is named "Setting ID" The changes have been done for all countries .	🔴	8.29.3
Change of update rule for row E37 in the Reporting settings (Sweden)	For new companies, the Update rule on line 18 - E37 Inköp trepartshandel EU is changed from + Output - input to + input - output. This change will change the amount from being negative to positive when the amount for invoices is higher than for credit notes. Note! Existing companies must change this manually.	🔴	8.26.0 (8.26.0 8.1036)
Intrastat and drop-shipment with arrival picking wrong values	Intrastat and drop-shipment with arrival picked values from the sales invoice instead of the purchase receipt. This has now been fixed.	🔴	8.27.0
Error when downloading the SAF-T report	Previously, the error message "Value was either too large or too small for an Int16" appeared when including subaccount. This is now fixed, so large values of subaccount ID are not causing an error.	🔴	8.26.0 (8.26.0 8.1036)
Incoming balance from SIE imported as quantity	Earlier, when importing vouchers with SIE import (GL40101S) and import type Incoming balance, there was an error where the balance also was imported to the Quantity column. This has now been fixed.	🔴	9.24.0
Reclassifcation of transactions between branches	The error when you tried to reclassify transactions between branches, which said that inter-company mapping was missing has now been fixed. You got the message if the active company was different from the one reclassified, or when you reclassified between many branches at the same time where some of them missed mapping. The reason was that it created a batch with the active branch in the heading and then all lines in this batch, and then there could be branches that were not mapped against the branch in the heading. We now create a batch for each original branch and use this in the heading for each batch.	🔴	8.25 (20090 8)
Error closing VAT report in multi-branch company when Exclude transactions from previous period is used	When closing a VAT period, when Exclude transactions from previous periods option was selected, you got an error message if there were unreleased transactions from other branches. This has now been fixed.	🔴	8.25 (20090 8)
Copy DPLM column sets	The column sets DPLM2, DPLM3 and DPLM5 contain an error in the column range for the first line in the heading column F. It referred to column D. When you tried to copy the column set you got an error message. This has been fixed for new companies but for customers who have started before version 8.25, and made any changes in the column set, the value has to be changed from D to F manually if they want to copy the column set.	🔴	8.25 (20090 8)

Preparing VAT report for the second branch when filing tax by branch	When preparing revision 2 or higher in a company with branches, filing tax by branch was not possible for the all branches after the first one was prepared. This has now been fixed.	🟧	8.25 (200908)
Calculation of new total amount on Supplementary tax report for Dutch customers with branches	When you have more revisions, the suggestion is Supplementary tax report for the Dutch customers. The calculation of the New total amount was selecting the value from all branches. This has now been fixed and it selects the values from the branches belonging to the company/branch and includes all periods from the selected first reported period to the reporting period. Note! The old reported value can be changed and it is not recalculated if you have changed it or the first reporting period.	🟧	8.25 (200908)
Printed Dutch VAT report showing correct status for sent/not sent in multi-branch companies	If a Dutch VAT report had not been sent to AutoReport before you printed it, you got the message "Rapport is niet verzonden". For a multi-branch company this message was sometimes shown both when the report had been sent and not. This has now been corrected and for multi-branch companies, the system will check the following before the "Rapport is niet verzonden" message is shown: - For a company without branches, it will not matter if you enter only company or branch in the report. - For a company with branches without File tax by branch, it will test if the company is sent. - For a company with branches with File tax by branch, it will test if the company and branch are sent.	🟧	8.46.0
Intrastat report problem with dropships	There was an issue with the Intrastat report showing as many lines for each item as there was on the purchase receipt, even if the file sent to government was correct. This has now been fixed. Also, the issue where purchases with the drop-shipment type did not show transportation mode correctly has been fixed.	🟧	8.25 (200908)
Manual batches in the 'Journal transactions' (GL301000) window generated duplicate lines in the 'General ledger transactions with VAT' (TX40500S) window.	The error of having many rows with the same VAT ID in journal transactions with the 'Create VAT transactions' check box selected, is now fixed. All reports and inquires using the SigmaTaxSpecificationDetailsViewExtended are not showing duplicated lines for the tax account.	🟧	8.24 (200623)
Location considered from purchase order in Intrastat reporting	In Intrastat reporting, the report now considers the location from the purchase order.	🟧	8.39.0
New export to Excel function "Export with headers"	There is a new export to Excel function "Export with headers". It is available for ARM reports under the Financial statements section. This routine will generate headers in Excel files the same way as printing on paper, instead of only at the top of the Excel spreadsheet.	🟧	8.25 (200908)
General ledger transactions with VAT (TX40500S) did not run with closed/deactivated periods selected	Previously, in the General ledger transactions with VAT (TX40500S) window, the filter From and To period did not allow inactive periods. This is now changed and all periods are available for selection.	🟧	8.24 (200623)
Wrong character set used in SIE file export	Earlier, the use of a wrong character set for the SIE file export (GL40100S) caused the appearance of Swedish special characters. This has now been fixed and the used character set is IBM Extended PC 8-bit ASCII (codepage 437)	🟧	8.41.0
Duplicate lines for 6 % VAT after upgrade to version 8.21	A script is executed on all Norwegian companies having a duplicated VAT rate for the 6% rate change for 01.04.2020 to 31.10.2020 The duplicated line is now removed. For companies, without VAT, the rates are set to 0,00%	🟧	8.22 (200526 Release), 8.23 (200609)
Information related to the clicked setting ID not shown in the Journal reconciliation preferences	Previously, when you double-clicked a setting ID in the Journal reconciliation preferences window's list view (GL302SPL), a different record was opened in the Journal reconciliation preferences (GL30200S) window. This has now been fixed. The sort order has also been set to "Ascending".	🟧	8.27.0
VAT transaction with different Document type and same Ref. no. was duplicated in the general ledger with VAT inquiry	Previously, the database for the VAT specification was missing a check of the document type, so if an invoice and a credit note had the same number it doubled the rows shown for both documents. This is now fixed, and the database now also checks the document type for customers, suppliers and cash transactions.	🟧	8.22 (200526 Release)

Correct sign for values in General ledger transactions with VAT	In some combinations, there were errors in the sign of some of the VAT columns and that made it difficult to reconcile the general ledger transactions against the VAT report (TX502000). Errors that have been corrected: 1. Batch number when an invoice and a credit note had the same reference number. 2. VAT report period when an invoice and a credit note had the same reference number and was closed in different report periods. 3. The sign on the reversed tax for a credit note in Taxable amount and VAT amount. 4. The sign on Total taxable amount, Total VAT amount and Original VAT amount are now positive for purchase invoice and sales credit note and negative for purchase credit note and sales invoice. 5. Correct sign on expense amount for credit note and negative lines.	▣	8.46.0
Fixed the wrong column set for the Profit and loss (detailed) report (GL63501S)	Previously, the 'Profit and Loss (detailed)' report (GL63501S) used the DPLP2 column set, which was wrong. Now, the report is changed to use the DPLM3 column set instead. This will not be updated for companies where this report has been changed by users.	▣	F2020 05
Error in SAF-T report if the selected organisation is missing actual ledger	In the SAF-T report window, the error with "Object of a reference not found" is replaced with a warning in the "From period" column if the selected company is missing a ledger of the "Actual" type. Now the message is: Ledger is not defined for this organisation.	▣	8.25 (20090 8)
Wrong beginning balances on 'Transactions for account' report (GL633500)	Earlier, including reclassified transactions in the Transactions for account report (GL633500) returned wrong opening balances. This has now been fixed.	▣	8.41.0
Supplementary unit and supplementary code included in Intrastat report file	From now on, supplementary unit and supplementary code will be included in the XML file when sending the Intrastat report to AutoReport. Please note that this only applies for Finnish companies for now.	▣	8.22 (20052 6 Releas e)
Manual override of autonumbering in import scenarios	In earlier versions, when using the functionality for manual override of number series during import from the 'Import by scenario' (SM206036) window, the manual numbering did not apply correctly for all scenarios. This is now fixed. To manual override of number series during import, you have to select the check boxes 'Allow manual numbering on import' in the Number series (CS201010) window and 'Override number series upon import' in the Manage import scenarios (SM206025) window.	▣	F2020 05
Refreshing of contact information in the SAF-T report in a multi-branch company	The contact information in the SAF-T report is now refreshed correctly. In a multi-branch company, it will not show the previous values if you select a company where the SAF-T information is missing but it will be empty.	▣	8.25 (20090 8)
Export of supplier posted on debit balance instead of credit balance in SAF-T report	In the 'SAF-T report' (TX50600S) window, the values of supplier balance are now swapped: If outstanding amount is positive for invoices, it will be exported to the OpeningCreditBalance and ClosingCreditBalance. If the outstanding amount is negative for credit notes or payments, it will be exported to the OpendingDebitBalance and ClosingDebitBalance for the suppliers. This will be the same way the balance is posted in the supplier ledger account (2400).	▣	F2020 05
Gross and net amounts on Self employee report - RF-1301	The Self employee report - RF-1301 for Norway reported gross amount as net amount. This has now been fixed and the gross amount from the document line is reported with the net amount.	▣	8.25 (20090 8)
Error on duplicate Supplier reference on closing of VAT period for a tax group	The error when closing a tax report for a multi-branch company on duplicated supplier reference has been fixed, when the setting Raise an error on duplicate supplier references is set in the Supplier preferences window. It is also possible to create invoices for the Tax agency supplier with the same supplier reference when this setting is set.	▣	8.25 (20090 8)
Reclassify transactions for currency gain and loss accounts	When having a currency loss or gain, it was not possible to do a reclassification for this account in the Reclassify transactions (GL506000) window. This has now been fixed. There are two new columns in the window to show the debit and credit amounts in both the base and the document currency. Note that it's not possible to use the split line functionality in this special situation.	▣	8.54.0

Release Notes	Documentation	T	Ret versi
Wrong description for the TASESP row set codes 2260, 2270 and 2310	The default settings for the row set 'TASEP' has been improved for Finnish companies. The description has been changed for the codes 2260, 2270 and 2310, to better reflect the account classes and the three sections have been set to expand by account. Note! The descriptions will not be changed if the row set has been manually changed or if multi-language is in use.	🔲	8.40.0
Dutch VAT report (TX62105S) showed incorrect figures after resend and when supplementary reports were sent	Earlier, when the VAT report was for any reason resent or when a supplementary report was sent, the VAT report, Dutch (TX62105S) doubled up the amounts for each sending. The VAT amounts in the system and in the file were correct but not in this printed report. This has now been fixed.	🔲	8.49.0
Drop-shipment orders with Intrastat	Drop-shipment orders are now working with Intrastat settings. You can now also use a different location as the country with Intrastat.	🔲	8.24 (200623)
Warning in VAT report (NL) when using supplementary report with negative amounts	Earlier, when using a supplementary VAT report in the Netherlands, with negative amounts below the limit amount 1,000.00, the warning was not correct in the next VAT period. This has now been fixed.	🔲	8.77.0
Incorrect data in the Swedish VAT report when having Multi-Branch	The Swedish VAT report (TX62108S) did not present the correct amounts if Multi-branch was in use and you could not use the report as documentation. The Process VAT report (TX502000) window showed the correct values so you had to print an Excel sheet containing the values. This has now been fixed so the values from the selected company/branch is showing the same values as in the Process VAT report window.	🔲	Main
Use trial balance in a multi branch company	The error when using trial balance (GL303010) in a multi-branch company where the values from other branches were included has now been fixed and each branch is handled separately.	🔲	8.63.0

338 opgaver

Accounting Modules

Release Notes.	Documentation	T	Ret versi
Expense attachment file name in Inbox aligned with file name used by Expense service	In version 9.81, the claim report from Expense was made available in some windows. In this release, the filename of the claim report has been aligned to include the internal reference number of the claim in VnE and the claim ID from Expense. In addition, this file is a read-only and cannot be deleted from the File maintenance window (SM202510).	☑	9.83.0
Error when deleting a reconciliation statement.	When deleting a reconciliation statement the transactions included were not correctly updated in the database and were not showing up again when creating a new reconciliation statement. This has now been fixed.	☑	9.67.0
Please create me 4 BLT companies on stage for testing: • Ieva Stage NO • Ieva Stage Api NO • Ieva Stage NL • Ieva Stage SE Users: ieva. blinstrubiene@visma.com, sigm abuilder@visma.com✉ and ApprovalCenter@visma.com.		☑	
Prevent the same incoming payment message to be processed multiple times in Autopay Inbox window	Previously, an incoming payment message could have been processed multiple times by different users causing duplicate transactions in the system. To prevent this, there is now an additional status "Ready for processing" in the Autopay Inbox (CA50400S) window, which will be applied when processing incoming payment messages. Account statements and outgoing payments will not change to this status during processing.	☑	9.26.0

Payment date available in response message for CustomerPayment GET and GET all	There is a new field "Payment date" available in the response message for the CustomerPayment GET and GET all operations	☑	9.18.0
Increase tests running time. Exclude "trash" in tests.		☑	
New number of messages filter in the Autopay inbox	There is a new filter option "Number of messages" in the Autopay inbox (CA50400S) window, which will specify how many records are retrieved. The default value is 0 meaning all messages are visible in the table. When using this option it will filter ascending from the lowest to highest FileID and can be added in the scheduler so that you can process a specific number of messages.	☑	9.18.0
Based on requests from a potential large customer (Alfa Accountants) in the Netherlands we have gotten a list of requests to new/changed functionality in the fixed assets module. It has been suggested that this can be solved as a combination of changes in Visma.net and additional framework extensions. The question is - will we prioritize these changes in Visma.net and how large do we expected these changes to be? Input received: Presentation: https://docs.google.com /presentation/d /1FYhLLSU1cVw7sxITrTyB2OX dC6dBWtUwM-Dpum6tJhE /edit#slide=id. g100c0d3fb84_0_9 Documentation: https://drive.google.com/drive /folders /1_TnTvTBJj_Xh9EmQTKhO61 gNkoASNKjl		☑	
Workflow Request message for approval on timecards and expense claims updated with new field branchID.	The Workflow Request message for approval on timecards and expense claims has been updated with a new field branchID.	☑	8.71.0
Improved navigation between transactions in Process incoming payments window	Navigation between transactions in the Process incoming payments (AR305000) window has been improved.	☑	8.45.0

When developed - please add a list of the terms to be translated + relevant screen ids

Also please add illustrations of the windows containing the fields to be translated - both in regards to creating a UK translation - and in regards to the other languages. If they are in dropdowns etc. Very important!

If strings are not to be translated - then these should be labelled by developers so that they are not collected in Crowdin.

Below is a list of the necessary information:
Context information for UI strings

The context information should contain a short description of the UI string including the following:

- Screen Id(s)
- Type: check box, field name, button, tab, drop-down, error message etc.
- Screenshot (optional/when necessary)
- Description: Short text about the usage of the string
- Abbreviations: Explain what they mean. In the description field also mention the original string that the abbreviation is created for (if applicable)

Example:

Screen ids: AR301000, SO303000

Check box setting on the Invoice address tab.

The value in the Description field in the Sales orders window will be copied to order confirmation and invoices, if you enable this check box.

Possible to create and delete Account groups if only Project Accounting Base Package is activated	Previously, it was not possible to create and delete account groups if only the Project Accounting Base Package is activated. This is now available for Project controller role and Administrator role as well.	☑	8.37.0
New accounts for currencies for unreleased gain and loss provisioning accounts	The template databases for Denmark, Finland, Norway, and Sweden have been updated with two new accounts in the Chart of account, which are used on Currencies for unreleased gain and loss provisioning accounts. These accounts are used when you revalue supplier and customer accounts instead of the supplier or customer account. This will make it easier to reconcile between the supplier/customer balance and General ledger accounts. These accounts will not be added to existing customers.	☑	8.28.0

COA templates updated with accounts for Visma.net Payroll	All COA templates used in First time startup are updated with accounts required for Visma.net Payroll.	☑	8.26.0 (8.26.0 8.1036)
Default task automatically shown when selecting a project with multiple tasks	Now, if the project has multiple tasks and one of them is set as the default task, this task will be shown automatically when selecting the project in the following windows: - Expense receipts (EP301020) - Expense claims (EP301000) - Time cards (EP305000) - Sales invoices (AR301000) - Purchase invoices (AP301000) - Issues (IN302000).	☑	8.25 (20090 8)
General ledger accounts for revaluation wrongly setup for Finnish companies	In previous versions, the general ledger accounts for revaluation (Unrealised G/L and Revaluation G/L) were wrongly setup for Finnish companies. This has now been fixed for new companies. For existing companies, this has to be changed manually.	☑	8.25 (20090 8)
Webhook notifications are activated when Severa is activated in the Enable/disable features window	The Webhook notification for Employee and Employee class is activated by default and not possible to change when the Severa integration is enabled in the Enable/disable features window.	☑	8.23 (20060 9)
Recognise sales invoice no. based on prefix and invoice no. which has alphanumeric characters w/ or w/o separators	The system will now recognise the sales invoice number, even when - the invoice number has alphanumeric characters - the invoice number has seperators as . or - - the invoice number has alphanumeric characters and seperators in combination.	☑	8.39.0
Recognise sales invoice no. based on prefix and invoice no. having multiple numbers separated by dot or dash	The system will now recognise even sales invoice numbers having multiple numbers separated by dot or dash.	☑	8.39.0
Recognise purchase invoice no. based on prefix and invoice no. having alphanumeric characters w/ w/o sparators (dot or dash)	The system will now recognise purchase invoice numbers that have alphanumeric characters or separators . or -	☑	8.39.0
Recognise purchase invoice no. based on prefix and invoice no. having multiple numbers separated by dot or dash	The system will now recognise and match purchase invoices that have a purchase invoice number with multiple numbers that are separated by dot(".") or dash("-").	☑	8.39.0
Recognise supplier invoice no. based on supplier reference having alphanumeric characters w/ or w/o separators (".", "-")	The system will now recognise and match supplier invoices that have a supplier reference with letters and numbers with and without dot(".") or dash("2").	☑	8.39.0
Recognise supplier invoice no. based on supplier reference having multiple numbers separated by dot(".") or dash("-")	The system will now recognise and match supplier invoices that have a supplier reference with multiple numbers that are separated by dot(".") or dash("-").	☑	8.39.0
New reason code for the Supplier write-off functionality	There is a new reason code for the Supplier write-off functionality and it will get the next free number during upgrade.	☑	8.25 (20090 8)
Performance improvements in Reconciliation statements	In the Reconciliation statements (CA302000) window, with the current changes the code will no longer query the database to refetch the same data, unless the filter is changed. Changing the filter means changing one or more of the following details: account id, reference number, reconciliation date, load documents up to (date) Now the code will return the data from the cache for any action that does not involve a filter change.	🔖	9.65.0
Hide/unhide expense claims in the Expense inbox	In this version, we are releasing a new feature in the Expense inbox window, hide/unhide claims. An expense claim in status 'Error' can be hidden from the inbox by selecting the claim and then clicking the Hide/Unhide button. The claim is then moved to a new status, 'Hidden'. At the moment the claims can be hidden one by one. The claim can always be put back in status 'Error' by selecting the claim and clicking the Hide/Unhide button.	🔖	9.85.0

Improvements to the claims validation process in the Expense inbox	The claims validation process in Expense inbox (EP50604S) has been refactored and improved for better performance. This is only available for certain companies.	🔖	9.76.0
Claim summary report from Expense available in ERP	The claim summary report (PDF file) created in Expense is now available on the claim in the Expense Inbox (EP50604S) window, the claim in Expense claims (EP301030) window and on the purchase invoice in Purchase invoices (AP301000/PL) window. To open the report, click the file icon.	🔖	9.81.0
Create customer and supplier refunds without applications	It is now possible to create supplier and customer refunds without application from the Process bank transactions (CA306000) and Process incoming payments (AR305000) windows.	🔖	9.79.0
Activated upload of CAMT053 files for SE, NO, DK and FI	It's now possible to upload CAMT053 in the Import bank transactions window in all countries. You have to activate Upload file manually for the cash account.	🔖	9.84.0
Improved performance in the Projects (PM301000) window	The overall performance of the Projects screen (PM301000) has been improved. Different actions and processes have been enhanced to run faster.	🔖	9.63.0
Reconciliation Statement	When creating a Reconciliation Statement the fields 'Reconciliation date' and 'Load Documents up to' where filled automatic with today's date. To avoid loading a lot of unnecessary data we have changed this so the field has to be selected before we load data in the window.	🔖	9.63.0
Prevent the same Account statement message to be processed multiple times in Autopay Inbox window	Previously, an Account statement message could have been processed multiple times by different users causing duplicate transactions in the system. To prevent this, there is now an additional status "Ready for processing" in the Autopay Inbox (CA50400S) window, which will be applied when processing account statement messages. Outgoing payments will not change to this status during processing. This feature will be activated for PILOT customers first.	🔖	9.36.0
The setting Display only relevant matches in Process incoming payments has been moved	Earlier, the setting Display only relevant matches was earlier shown in the Process incoming payments (AR305000) window only. The settings has now been moved to the Cash management preferences. There is a setting for Display only relevant matches both for the Process incoming payments and for the Process bank transactions (CA306000) windows. The setting can also be found and changed in the match setting in each window.	🔖	9.75.0
Supplier reference added to Projects window	A column showing Supplier reference has been added to the Supplier invoices tab in Projects (PM301000) window.	🔖	9.26.0
Attach files to payments from the Process incoming payments window	Earlier, it was not possible to attach files to a payment from the Process incoming payments (AR305000) window. This has now been fixed.	🔖	9.86.0
Changes in the Danish template	There are two new accounts in the chart of accounts (GL202500). In addition, the wrong accounts in the allocation rules (PM207500) have been replaced with the new accounts. These changes will only apply for new databases created based on the template after these changes have been released.	🔖	9.27.0
Danish template updates for allocation and invoicing rules	The descriptions in the Allocation rules (PM2075PL/PM207500) and Invoicing rules (PM2070PL/PM207000) have been updated in the Danish template.	🔖	9.26.0
Purpose included in the Process bank transactions window	The Purpose field, included in the XML file 'Account Statement' from AutoPay, is now exposed in the Transaction description in the Process bank transactions (CA306000) window.	🔖	9.63.0
Order description and line total added to Projects window	Two new columns have been added to the Commitments tab in the Projects (PM301000) window. The columns are: Order description and Line total.	🔖	9.27.0
Two new columns in the Bank transactions history window	For more details on bank transactions, two new columns have been added in the Bank transactions history (CA402000) window: - Name from bank - Account from bank.	🔖	9.18.0
New alignment of the settings in the header of Cash account window for a better user experience	The settings in the header of Cash accounts (CA202000) window have been grouped for a better user experience in 4 sections: General info, Settings, Settings for reconciliation, and Settings for AutoPay integration.	🔖	9.08.0
Performance improvements in Release expense claims (EP501000) window	The performance of the Release expense claim (EP501000) window has been improved regarding: - the loading time of the expense claims in the window - the selection time of multiple expense claims - the releasing process time of multiple expense claims	🔖	9.14.0
New possibility to combine sales subaccount from project and project task	You now have the possibility to combine sales subaccount from project and project task in the Customer ledger preferences (AR101000) window. These new options are applied when creating a sales invoice with project and task in the Sales invoice (AR301000) and Customer invoice (SO303000) windows.	🔖	9.06.0

New columns on Task tab in Projects window showing visibility setting of task	There are new columns on the Task tab in the Projects (PM301000) window showing the visibility setting of tasks.		9.03.0
Project accounting fields not visible on DK country template	The Project accounting fields are not visible on the DK country template if the Project accounting license is not activated.		9.05.0
Performance improvements in Autopay inbox window	There are new performance improvements in the Autopay inbox (CA50400S) window when using the action Import from Autopay.		9.17.0
New recognition option Use Name from bank in Bank transaction rules window	You can use a new option for recognition by activating the checkbox "Use Name from bank" in the Bank transaction rules window, which will improve the automated transaction processing.		9.18.0
New option for setting Branch in Bank transaction rules	There is a new field Branch in the Bank transaction rules (CA204500) window, which can be set for a much better and automated transaction processing.		9.18.0
New possibility to choose booking date or value date to be used as transaction date	You now have the possibility to choose booking date or value date to be used as transaction date per cash account for processing incoming payments (VIP files). There is a new field in the Cash accounts (CA202000) window named "Process incoming payment transaction date" where you can select either Booking date or Value date.		9.02.0
Loading of documents improved in Process bank transactions and Process incoming transactions windows	In the Process bank transactions (CA306000) and Process incoming transactions (AR305000) windows, the performance of loading the documents that are in the table in these windows has been improved.		9.06.0
Matching outgoing AutoPay payments automatically with end-to-end ID	When sending outgoing payments through AutoPay, all supplier payments will get a unique ID that will automatically match transactions within bank statements, if the bank supports sending it in the bank statement. This applies to the new payment process.		9.09.0
The report "Acquisitions" showed the wrong acquisition cost	The report "Acquisitions" showed the wrong acquisition cost when an addition was made to a fixed asset. This has now been fixed.		9.04.0
New option "Automatic split of batch payment from customers into payment per customer" for bank transactions	You have now the possibility to split batch payments per customer for bank transactions by using the new setting "Automatic split of batch payment from customers into payment per customer" on the Settings for matching tab in the Cash management (CA101000) window.		9.13.0
Transaction description from bank transaction shown under Select documents in Process incoming payments and Process bank transactions windows	Transaction description from bank transaction is now displayed under Select documents in both Process incoming payments (AR305000) and Process bank transactions (CA306000) windows.		9.03.0
Functionality for matching invoices when no CID/KID is available	You have now the possibility to: - Match invoices by invoice number series or prefix - Extract invoice number when an invoice is created after incoming payment - Match against customer bank account number The priority of matching criteria per entry is now the following: UNSTRUCTERED 1. Use prefix to get invoice number 2. Use ARInvoice numbering series to determine the value for invoice ref. number paid 3. Use prefix to get KID STRUCTURED 1. Get CreditorReferenceId 2. Get ReferredDocumentNumber		8.99.0
Recognise incoming payments by CID in Process bank transactions window	In the Process bank transactions (CA306000) window, it is now possible to recognise incoming payments by their CID (KID) if you get an extended bank statement from your bank through AutoPay.		8.99.0

New checkbox Allow unapplied balance in Process incoming payment and Process bank transaction windows	There is a new checkbox Allow unapplied balance in the Process incoming payments (AR305000) and Process bank transactions (CA306000) windows that you use to process payments in situations where you need to overrule the setting "Do not create payment when bank payment amount is not fully applied". This checkbox is available only if the setting "Do not create payment when bank payment amount is not fully applied" is marked in the Cash management preferences (CA101000) window and the Unapplied balance is different from 0.	🔖	9.32.0
View side panel details in a separate window when pressing the Up arrow icon	Now it is possible to view the side panel details in a separate window when pressing the UP arrow icon. If the side panel contains a primary list screen or an entry screen, when opening in a separate window, you need to select the specific record or entity in the selection box in order to get the corresponding data.	🔖	9.08.0
Resize the side panel by drag and drop	It is now possible to resize the side panel by clicking the resize icon at the bottom of the side panel bar and then dragging and dropping to adjust the size you want for showing the details in a better view.	🔖	8.98.0
Currency information added to the Account details inquiry	In the inquiry Account details (GL404000) you were able to select the check box Show currency details, when using an account with a currency set in the chart of accounts. Now you can select this check box for all accounts, to visualise the debit and credit amounts also in currency.	🔖	8.73.0
As an accountant I need to have proper warnings and error messages for the Revalue currency functions, so I know why I am not allowed to run revaluation on certain conditions	In the Revalue general ledger accounts (CM506000), Revalue supplier accounts (CM504000), and Revalue customer accounts (CM505000) windows, there are changes regarding the control of open, closed, and inactive periods. If you get an error in the Period column, the Revalue button will be disabled and you are not allowed to process any transactions. The settings Generate reversing entries and Allow posting on closed periods in the General ledger preferences window and the status of the financial periods are checked. The check on next period is not done for General ledger accounts. - Generate reversing entries is On post, period is closed, and Allow posting on closed periods is on: WARNING: The period is closed but the batches will be processed. - Generate reversing entries is On post, period is closed, and Allow posting on closed periods is off: ERROR: The financial period PP-YYYY is closed and a reverse batch cannot be created due to the current settings in the General ledger preferences window (GL102000). To allow changing it, select 'Allow posting to closed periods'. - Generate reversing entries is On period closing and Allow posting on closed periods is off: ERROR: The period PP-YYYY is closed and a reverse batch cannot be created due to the current settings in the General ledger preferences window (GL102000). To allow changing it, set the setting 'Generate reversing entries' to 'On post' and select 'Allow posting to closed periods'. - Generate reversing entries is On period closing and Allow posting on closed periods is on: ERROR: The period PP-YYYY is closed and reverse batch cannot be created due to the current settings in the General ledger preferences window (GL102000). To allow changing it, set the setting 'Generate reversing entries' to 'On post'. - The current period is inactive: ERROR: The financial period PP-YYYY is inactive. Activate the period in the Financial periods window. - The current and next period are inactive: ERROR: The financial periods PP-YYYY and PP-YYYY are inactive. Activate the periods in the Financial periods window.	🔖	8.63.0
New columns for individual segments of subaccount string in Asset splits history inquiry	There are new columns for individual segments of the subaccount string available in the Asset splits history inquiry (FA405000) window.	🔖	8.70.0
New columns for individual segments of subaccount string in Asset balance by account inquiry	There are new columns for individual segments of the subaccount string available in the Asset balance by account inquiry (FA403000) window.	🔖	8.70.0
VAT total now visible in Release cash transactions window	The VAT total amount is now visible in the Release cash transactions (CA502000) window.	🔖	9.03.0
New columns for individual segments of subaccount string in Asset transaction history inquiry	There are new columns for individual segments of the subaccount string available in the Asset transaction history inquiry (FA404000) window.	🔖	8.70.0

Match an incoming payment with an invoice not having the same amount but the same KID /invoice	Earlier, if you had an incoming payment with a different amount than the invoice, it was not matched automatically. Now the system matches the payment with the invoice even if the amount is not the same. This only applies for the Process incoming payments window, not for the Process bank transactions window.	🔖	8.47.0, 8.48.0
Change of base currency in First Time Startup wizard, removed the restriction of functionalities for AutoPay and AutoInvoice services	In previous versions, when the base currency had been changed to a different currency in the Financial settings window in the First Time Startup wizard, the AutoPay and AutoInvoice services had limited functionality. From this version, you can use the services without any limitations after you have changed the base currency.	🔖	8.66.0
New default email account not using default account settings	When creating a new default email account in the Email (SM20400S) window, the account was not set to use the default mail account settings. This has now been fixed.	🔖	8.70.0
Performance improvements in Release time cards (EP505010) window	The performance of the Release time cards (EP505010) window has been improved regarding: - the loading time of the timecards in the window - the selection time of multiple timecards - the releasing process time of multiple timecards	🔖	9.05.0
Webhook notifications turned ON when Severa integration is activated	Webhook notifications are now turned ON for customers, customer classes, non-stock items, and item classes when the Severa integration is activated.	🔖	8.69.0
New changes in Visma.net Project Accounting base package and in Visma.net Project Accounting Advance Allocation and Billing	The following screens have been removed from the Administrator role from Visma.net Project Accounting base package and moved to Visma.net Project Accounting advance allocation and billing for the same role: PM207000 PM204200 PM204100 PM205000 PM207500 PM40107S PM502500 PM506000 PM503000 PM502000 PM505000 PM206000 PM307000 The following screens have been removed from the Financials light user role from Visma.net Project Accounting base package and moved to Visma.net Project Accounting advance allocation and billing for the same role: PM40107S PM206000 PM307000	🔖	8.36.0
Company tree info tab now available in Employees window (EP203000)	The Company tree info tab is now available in the Employees window (EP203000), which makes it easier to add employees in the organisational approval structure.	🔖	8.35.0
Enable Expense integration in Enable/disable functionalities window	You can now enable the Visma.net Expense integration directly from the Enable/ disable functionalities (CS100000) window by selecting the Expense integration check box (available in countries where the Expense integration has been released)	🔖	8.42.0
New endpoints for GET customers and inventory items by internal ID	It is now possible to get the data for a customer and an inventory item by its internalID using the new endpoints: GET /api/v1/inventory/internal/{inventoryId} GET /api/v1/customer/internal/{internalId}	🔖	8.67.0
New fields in Process bank transactions window in Select documents pop-up window	There are following new columns in the popup window of the Process bank transactions (AR305000) window in Select documents: - Customer order/supplier ref. - External reference/buyer's order no. - Customer name/supplier name	🔖	8.41.0
Task description available on Revenue and Cost budget tabs in Projects	Starting from this version, you can see task descriptions in a separate column on the Revenue and Cost budget tabs in the Projects (PM301000) window. These have to manually added to the two grids. On the Revenue budget tab, you also have a description field that can be edited.	🔖	9.86.0

New "Status" column in the Process bank transactions screen	Added a new *Status* column in the Process bank transactions screen where you can see 5 types of error codes. These are : NDS - No documents selected, RB- Remaining balance available, NB: No business account selected, NE: No entry type selected, NL: No location selected. You can find the error explanations if you click the Status description link.	🔖	8.36.0
Employees are able to register a claim with multiple projects	Employees are now able to register a claim with multiple projects. We movedthe project field in the Expense receipt inbox from the header to the line level for the following fields: project ID; customer ID; location ID. We added in Expense receipt inbox additional fields for a better overview of the details: project description; customer name; location name	🔖	8.33.0
Support annuitity depreciation for Dutch methods	There is a new calculation of depreciation for the fixed assets called "Dutch Method 3". The depreciation amount for a period is based on annuities, and first you must enter the interest percentage for financing the residual value.	🔖	8.33.0
New field Customer project no. in the Sales invoice (SO303000) window	There is a new field called Customer project no. in the Sales invoices (SO303000) window on the Financials details tab.	🔖	8.33.0
New field "Customer project" in the Sales invoice window	There is a new field "Customer project" in the Sales invoices window (AR301000) on the Financials details tab in the References section. You can use this field to enter the project number requested by the customer. When a project number is entered in this field, it will replace the internal project number when sending to Autoinvoice for VismaXML and PEPPOL BIS. When nothing is filled in, the internal project number will be sent to AutoInvoice.	🔖	8.29.0
Button "Extract invoice numbers" added to Process bank transactions window for extracting invoice numbers from bank files (NL)	A new button "Extract invoice numbers" is added to the Process bank transactions (CA306000) window for Dutch companies, which gives you the possibility to extract invoice numbers from bank files. This is needed when you enter invoices after the bank import or change the prefix settings. After the extract invoice number you are able to automatch. Remember to unmatch before running the automatch again.	🔖	8.55.0
Save purchase invoices with On Hold status and without project task	It is now possible to save a purchase invoice with a project and without a project task if the status of the purchase invoice is On hold.	🔖	8.26.0 (8.26.0 8.1036)
Authentication mechanism in the Common Data Service endpoints for currency exchange rates	When Visma.net ERP tries to download currency exchange rates from Common Data Service, it has to identify itself by providing a Client Token. This token is taken from IdServer by ERP and is given to Common Data Service for validation. After successful validation, the Common Data service provides the exchange rates to ERP. None of these changes are seen or experienced by the user, but done in the background.	🔖	8.30.0
View sales orders connected with projects in the Projects window	In the Projects window, on the Commitments tab you will now see the sales orders connected to the project, and have sales order types with the Commitment check box selected. You can also select check boxes "Show purchases" and "Show sales".	🔖	8.25 (200908)
Calculated column for variance quantity in the Projects (PM301000) window	As an improvement for project budgeting there is now a new column "Variance quantity" on the tab Cost budget tab in the Projects window that is calculated as the difference between the "Revised budgeted quantity" and "Actual quantity".	🔖	8.25 (200908)
Enabled the autopay conversion service and the exchange rate download for customers that have an unsupported base currency	In previous versions, you could not use the AutoPay service if you had changed the default base currency when you set up the system. In this version, we have made a change so that you will be able to use AutoPay with limited functionality if you change the base currency. You will be able to manually upload account statements and import currency rates.	🔖	8.23 (200609)
Default task option for project tasks	You can now set a project task as the default for a project using the new "Set default" button and the new "Default" column on the Task tab in the Project (PM301000) and the Project template (PM208000) windows. In the Project task (PM302000) and the Project template task (PM208010) windows there is the new "Default" checkbox that shows if the project task has been set as the default.	🔖	8.25 (200908)
Customer name available in the project selector	There is a new column in the Project selector in the Employee time card (EP305000) window: When you select a project in the grid, you will now see the customer name in the selector.	🔖	8.25 (200908)
Lookup field "Supplier ref." for manual adding of supplier invoices	Now, there is a new lookup field "Supplier ref." for manual adding of supplier invoices in the Process bank transactions window.	🔖	8.34.0

Improved Expense Inbox process for Autopay flow when working with multiple branches	When working with multiple branches, during the Expense Inbox processing of expense claims for the flow: "Payment in AutoPay, ERP integration for bookkeeping, tax report through payroll", the created purchase invoice now automatically uses the cash account and subaccount linked to the employee branch on the suspense line.	🔖	F2020 05
Possibility to import attachments from purchase invoices to sales invoices	On the "Attachments" tab of the Sales invoices window (AR301000), you are now able to import attachments from purchase orders if they are associated with the same project as the invoice. To make it easier to select the correct attachment(s) for the invoice, the dialog box showing the available attachments has two new fields: "Supplier number" and "Supplier name".	🔖	F2020 05, Visma. Net ERP Kanba n week 24, Visma. Net ERP Week 24
Create report with all reversed cash transactions linked to original cash transaction	It is now possible to track the reversed cash transactions, using the newly added 'Reversing cash entries' (CA690010) report. The report shows all the reversed cash transactions linked to the original cash transaction.	🔖	F2020 05
Import expense types through an import scenario in Visma.net Expense integration	Visma.net Expense integration (in pilot phase for NO, SE, FI): It is now possible to import expense types through an import scenario called 'Import Expense Types'. You find it in the Import by scenario (SM206036) window. The Excel provider has the standard expense types available in Visma.net Expense preconfigured and the VAT settings and general ledger accounts for costs and revenue can be adjusted. It also contains an explanantion on how to use the import scenario.	🔖	8.26.0 (8.26.0 8.1036)
New possibility to add account and subaccount directly in bank rules	There are two new fields in the Bank transaction rules (CA204500) window, Default offset account and Default offset subaccount. The account and subaccount are copied from the entry type, but they can be overridden on the bank rule. If no account or subaccount is entered on the bank rule, the system will retrieve them from the entry type.	🔖	8.83.0
The filter "RestrictedEmployee" results in the API returning only projects that the employee have access to, meaning: - unrestricted projects - restricted projects where the employee is listed (Employee tab in project screen) - user restrictions on projects enforced by settings in screen Project access (PM102000)	The filter "RestrictedEmployee" results in the API returning only projects that the employee have access to, meaning: * unrestricted projects * restricted projects where the employee is listed (Employee tab in project screen) * user restrictions on projects enforced by settings in screen Project access (PM102000)	🔖	8.0
Select multiple documents (invoices, credits) on one payment from the list with open documents while processing incoming payments/bank transactions	There is an improvement in the processing of bank transactions and incoming payments. Now you have the possibility to apply multiple customer or supplier documents at once. There is a new button "Select documents" which will trigger a window containing all the open documents belonging to the selected customer or supplier. For the ease of use, you can apply filtering on due date and branch, where applicable. You can even select documents using the same logic existing in the "Load documents" button.	🔖	8.29.3
Hide several bank transactions	In Visma.net ERP, there is a new improvement for hiding multiple bank transactions and incoming payments. First add the "Hide" column to the view. Then select the respective transactions using the "Hide" column and finally, press the "Hide selected" button.	🔖	8.28.0
Write off small balances on supplier invoices in supplier ledger	It is now possible to write off small balances on supplier invoices in the supplier ledger using the Write-off action from the supplier invoice. This will create a debit adjustment for the remaining amount. The general ledger account used for the write-off will be picked from the reason code that can be set in the supplier ledger preferences. It is also possible to set a write-off limit in the supplier ledger preferences.	🔖	8.25 (20090 8)

Calculate depreciation limit for buildings (fixed assets) by taxed value	In the Netherlands, the depreciation of buildings is limited by a percentage of the fiscal value (NL: WOZ-waarde). The building may not be depreciated (fiscal) more than 50% of the "WOZ-waarde" when the building is used by the company and 100% of the "WOZ-waarde" when the building is rent out. The "WOZ-waarde" is set yearly. When it changes, the depreciation has to be adapted. You are now able to connect this property tax group to fixed assets in Visma.net Financials. There is also a new inquiry that gives the accountant the needed amount and calculation for the fixed asset that are connected to the property tax group.	🏷️	8.52.0
Error entering Completion% field in the Projects window	When you tried to enter the Completion% field in the Projects (PM301000) window, an access right error message appeared. This has now been fixed.	⚠️	9.68.0
Job complete but no archive created in Download attachment process	There was an issue in the Download attachments window (SM508090) where no archive was visible on the Available zip archive tab even if the archive status was "The process has been completed. You can download your zip file(s)". This has now been fixed.	〽️	9.69.0
Matching of batch payments received in incoming payment files from Autopay.	We have improved matching of batch payments received in incoming payment files from Autopay inbox where the batch includes payments not matching the exact amount of the invoice/credit note.	〽️	9.67.0
Fixed assets issue on depreciation calculation for Next period averaging convention	Earlier, depreciation was calculated incorrectly in the Calculate depreciation (FA502000) window for fixed assets with the Next period averaging convention selected. This has now been fixed.	〽️	9.75.0
Matching invoices and payments when invoice numbers includes letters.	A small correction have been done in the matching functionality so alphanumeric invoice numbers are handled the same way as numeric invoice numbers.	〽️	9.56.0
Improved performance of the Balance projection by account report	The performance of the Balance projection by account report (FA670010) has been improved.	〽️	9.46.0
Performance improvements in Reconciliation statements when pressing the Toggled Reconciled button	The performance of the Reconciliation statements (CA302000) window, when pressing the Toggled Reconciled button, has been improved.	〽️	9.49.0
Currency error when processing bank transaction for a cash account with different currency than base currency	Previously, in Process bank transactions (CA306000) window when trying to save or process a payment for a sales invoice with a currency different from the base currency and a bank statement for a bank account in the same currency as the invoice, there was an error stopping the process: "Error: Inserting 'Currency info' record raised at least one error. Please review the errors. The currency rate is not defined. Error: 'Curr.rate' cannot be empty". This has now been fixed.	〽️	9.31.0
Payments not matched based on end to end ID in Process bank transactions	There was an error with payments which were not matched based on the end to end ID in the Processing bank transactions (CA306000) window if the Payment ref field in the Supplier payments (AP302000) window was not filled in. This has now been fixed.	〽️	9.18.0
Automatic matching of invoices not working in processing of bank transactions	In the previous versions, there was an issue on matching invoices in the Process bank transaction (CA306000) window because the Payment ref. no. fields were showing reference numbers with leading zeros. This has now been fixed.	〽️	9.04.0
Performance improvement in processing bank transactions and incoming payments	When you click Process in the Process bank transactions (CA306000) or Process incoming payments (AR305000) window, the processing time has been significantly decreased. We have implemented the following new features: - The possibility to split incoming payments in Autopay Inbox into smaller files if they contain more than 2000 transactions per file by marking the new checkbox "Split incoming payment file from Autopay (inbox) into smaller files for faster processing" in Incoming payment settings tab in Cash management preferences. - The check box "Display only relevant matches" in Process incoming payments that if marked will only show invoices that have matching relevance higher then 0.2 and will hide the low relevance invoices. - When processing large files the created GL batches will have maximum 200 payments in one batch.	〽️	9.25.0
Performance of selecting documents improved in Select documents pop-up in Process bank transactions window	The performance of selecting documents (the Select documents button) has been improved in the Process bank transaction (CA306000) window.	〽️	9.06.0
Invalid error token in download request	For some customers there were issues when receiving the account statements in Autopay inbox due to the generated token which could be not unique for parallel requests. This has now been fixed.	〽️	9.21.0

Improved the performance in the "Convert Purchases to Assets" screen (FA504500)	Improved the performance in the "Convert Purchases to Assets" screen (FA504500)	〰	9.07.0
Performance of loading documents improved in Customer payments window	The performance of loading documents (the Load documents button) has been improved in the Customer payments (AR302000) window.	〰	9.06.0
Error in calculation of depreciation for fixed assets with opening balance	Earlier, there was an error occurring in special cases in the calculation of depreciation for fixed assets (FA303000) created in the system with an opening balance (accum. depr.). This has now been fixed.	〰	8.96.0
Performance improvement in processing bank transactions and incoming payments	When you click Process in the Process bank transactions (CA306000) or Process incoming payments (AR305000) window, the processing time has been significantly decreased.	〰	8.92.0
Additional info field available in Process bank transactions window	The field Additional info is now available in the Process bank transaction (CA306000) window, and you can see the information in the screen.	〰	8.75.0
Sales invoice release process sometimes not creating project transactions	Earlier, the sales invoice release process sometimes didn't create the project transactions when releasing an invoice which has project and tasks. This has now been fixed.	〰	8.97.0
Disable account validation in Cash transaction window for Payroll Finland - Visma.net ERP Integration	The account validation that is in an account group or not from the cash transaction windows can be disabled for customers who have problems with transferring data in the Payroll Finland - Visma.net ERP integration.	〰	8.69.0
Automatically match payment from bank with higher amount than the invoice amount	You are now able to choose if you want to match automatically payments from the bank that have higher amounts than the invoice amount by using the setting "Do not create payment when bank payment is not fully applied" in the Cash management preferences (CA101000) window.	〰	8.65.0
Run allocation process stopped for projects with reversal transactions	The Run allocation process was stopped for projects with reversal transactions when using the Validate project balance window. This has now been fixed.	〰	8.45.0
Large account statement not downloaded to Autopay Inbox	Earlier, there was a problem handling large account statements in Autopay Inbox that caused timeout issues. This has now been fixed.	〰	8.46.0
Change in AutoPay actions for import from AutoPay	There is a change when choosing an Autopay action in combination with setting "Automatic split of batch payment from customers into payments per customer" in AutoPay inbox (CA50400S). Now the action "Import from AutoPay" will NOT create a payment for matching several invoices that are paid. Manual action is required. The actions "Import from AutoPay and match" and "Import from Autopay and process" will create a payment and match the invoices.	〰	8.75.0
Change amount in the Change order window	In previous versions, it was not possible to change the amount in the Change order window on the Revenue and Cost budget tabs. This has now been fixed	〰	8.25 (200908)
Download attachments (SM508090) window improved	In this version, the Download attachments (SM508090) window has been improved. The archive file name now includes the company name and work module. Example: File name: Archive-Visma-Supplier ledger-From-202301-To-From-202312-xxxxxxxx.zip The included files in the archive now have a prefix which is the reference to the original document. Example: File name: Purchase invoice-200001-Invoice12821.pdf	$	9.61.0
New window Download attachments (SM508090)	In this version is released a new window called Download attachments (SM508090). This window should only be used when offboarding customers. Users with the financial administrator role can select the window from Integration workspace and download attachments on customer, supplier, journal, and cash transactions to one or more archives.	$	9.53.0
Side panel functionality available for seeing relevant information without navigating between screens	The Side panel functionality is now available and all customers can use it to see relevant information on customers, items, suppliers, etc. without having to navigate to different windows.	⚡	8.53.0, 8.66.0

Changed routines test	Changed routines of documentation, release notes and translations to support continuous delivery (the link in the release notes is not relevant for this case and is just a test).	⚡	
Improvements in Invoice Inbox for automatic processing of purchase invoices with projects **	The Invoice Inbox window has been improved so that purchase invoices with projects can be processed automatically. In the View details window, there is now: - a new column "Project", visible on the line level - a new field "Project" on the document level (visible only if the project is on the document level in the xml file) Moreover, during processing in Invoice Inbox, the project in the purchase invoice: - will be automatically mapped with the project in VNErp if it is available or active; - the project task will be automatically assigned according to specific steps: * if there is an invoice inbox rule with project and project task, then the project task will be assigned according to this rule. * if there is no invoice inbox rule, the project task will be the default project task set on the project. * if no default project task is set on the project and the project has only one active project task, then this project task will be assigned. * if the project has multiple active project tasks, then the project task will not be assigned, the purchase invoice will have the Error status and you need to manually select the correct project task in the Purchase invoices window to fix this error.	⚡	8.30.0
Booking of payroll taxes on a separate GL account for excess mileage/daily allowances	There is an improvement in the Visma.net Expense - Visma.net ERP integration in the Expense Inbox (EP50604S) window, which enables handling of booking of payroll taxable amounts on separate general ledger accounts for expenses, such as mileages and daily allowances. Therefore, there is now: - a new field called "Expense payroll taxable account" in the Non-stock items (IN202000) window for the non-stock items that have the type Expense - a new field called "Expense payroll taxable account" in the Posting classes (IN206000) window for the non-stock items that have the type Expense	⚡	8.38.0
Fixed asset depreciation report (FA615010) including fixed assets with Reversed status	The Fixed asset depreciation report (FA615010) was including the fixed assets with the Reversed status, which should not have been included. The report has been adjusted to exclude the reversed fixed assets.	🔲	9.87.0
Reversing disposals several times not working correctly	Reversing a disposal in the Fixed assets (FA303000) window did not work as expected when done multiple times. This issue has now been fixed and the disposal can now be reversed and done multiple times without problems	🔲	9.83.0
Incoming payments presented wrongly in Process incoming payments window.	When receiving an incoming payment file including an invoice and a credit note that is linked, so the credit note is closed, both the invoice and the credit note was shown as Receipts in the Process incoming payments window. This has now been fixed, but the fix will be behind a feature toggle until it has been tested by pilot customers.	🔲	9.81.0
Incoming payment shown as disbursement in Process incoming payments window	When an incoming payment file included a batch payment with one or more invoices and a credit note, and the system only found match on the credit note, the paid amount was shown in the Disbursement column instead of the Receipt column (AR305500). This has now been fixed.	🔲	9.81.0
Wrong totals for reconciled receipts and disbursements in Reconciliation statement	In some cases, the totals for reconciled receipts and reconciled disbursement in the Reconciliation statement (CA302000) were wrongly calculated. This has now been fixed, but already created reconciliation statements with wrong totals need to be deleted and created again to get the correct values.	🔲	9.68.0
Depreciation for fixed assets calculated incorrectly	Under the feature toggle 'AccModules_FADepreciationCalcReset', there was an issue when one of the depreciations was failing and then the depreciation for the following fixed assets in line was calculated wrongly in some special cases. This has now been fixed.	🔲	9.68.0
Auto-match error in Process bank transactions window	In Process bank transactions (CA306000), a bug in the auto-match function caused an error message when you had one purchase invoice paid over multiple transaction lines. This has now been fixed.	🔲	9.60.0
Scheduler for running depreciation	The scheduler for running depreciation monthly automatically did not work as expected. This have now been fixed.	🔲	9.56.0
Fix for performance issues and discrepancy between GL transactions and customer ledger payments in Process of incoming payments window and Process of bank transactions	Previously, there were performance issues and discrepancy between GL transactions and customer ledger payments in Process incoming payments (AR305000) and Process bank transactions (CA306000) due to not fully processing the payments during the automatic process of incoming payments. This has now been fixed. For the moment we have enabled these features only for Pilot customers.	🔲	9.47.0

Improved matching of incoming payments when receiving and processing account statements from the AutoPay inbox	The matching of incoming payments when importing account statements from AutoPay has been improved. In some cases, the file from AutoPay includes both structured and unstructured remittance info. Earlier the system matched based on the unstructured info. This has now been changed so that the system matches based on the structured info and, if no match is found, the unstructured info is used.	🔲	9.76.0
Wrong expense account used when processing foreign expenses from Expense inbox	In some cases, the expense account changed to a wrong account when processing foreign expenses from the Expense Inbox. This error has now been fixed.	🔲	9.33.0
Expense claims and wrongly calculated VAT in special cases	Earlier, there was an error that caused wrongly calculated VAT when using Reverse charge items in domestic expense claims. This has now been fixed.	🔲	9.31.0
Updates on import file/import scenario for Import Expense Types NO	The import file/import scenario for Import Expense Types NO has been updated. - Expense payroll account added for some expense types. - Items with a wrong item class have been corrected.	🔲	9.24.0
Fixed asset net value report and assets with multiple books	The fixed asset net value report (FA613000) showed some wrong values when multiple books were in use for an asset. This has now been fixed.	🔲	9.79.0
Fixed assets net value (FA61300) - Fixed assets with date placed in service in the future should be included based on period for receipt date	The Fixed assets net value report (FA61300) was including the fixed assets based on the placed in service date and should have based on the receipt date. The report has been adjusted and now it is including the fixed assets based on their receipt date.	🔲	9.86.0
Error when sending transactions with project X- non project code	In earlier versions, there was an error when sending transactions with project X- non project code, breaking the Payroll FI integration. This has now been fixed	🔲	9.21.0
ProjectBasic endpoint returning deleted projects	When third party integrators were using the ProjectBasic endpoint to get all active projects, the endpoint was returning all projects including the projects that were deleted. This has now been fixed.	🔲	9.19.0
Split of fixed assets with salvage amount	There was an issue where the split of fixed assets (FA506000) with salvage amount gave the original salvage amount on the initial fixed asset. The issue has now been fixed and now, after the split the initial fixed asset shows the correct split salvage amount and the calculations are made based on this value	🔲	9.85.0
Credit notes not taken into consideration when creating payments from Autopay Inbox processing and grouped per customer	Earlier, credit notes were not taken into consideration when payments were created from Autopay Inbox (CA50400S) processing and grouped per customer. This has now been fixed.	🔲	9.08.0
Excluded expense types EX_FB - fuel benefit and EX_MB - meal benefit from Expense Inbox	In Expense Inbox (EP50604S) the following expense type have been excluded from expense claims: - EX_FB - fuel benefit - EX_MB - meal benefit. Therefore, any claims having transactions with this expense types will not show these lines in Expense inbox.	🔲	9.17.0
Release general ledger transactions with projects and automatic reversing with Run allocation on release of project transactions selected	Earlier, it was not possible to release general ledger transactions with projects and automatic reversing, if the check box Run allocation on release of project transactions was marked in the Projects (PM301000) window. This has now been fixed.	🔲	9.10.0
Error in calculation of depreciation	Error in calculation of depreciation for fixed assets with opening balance	🔲	9.12.0
Transactions excluded from the Convert purchases to assets window	In the Convert purchases to assets (FA504500) window, the following transactions will not be displayed any more: - Reversed transactions: the information that it is reversed is in the debit adjustment document of the original document - Reclassified transactions: if the reclassified transaction is on another account, the transaction won't be displayed when choosing the reclassified account and when choosing the original account. If the reclassified transaction is not on another account, the information from the reclassification transaction will be displayed. - Corrected transactions via the Correct action: only the corrected transaction will be displayed.	🔲	8.91.1

Claim date validation from Expense Inbox not working	In Expense Inbox, the validation for expense claims that have their claim date in a closed or inactive period was not working. This has now been fixed and it is now possible to solve the error by using one of the options: - either activate the period - or mark the setting "Allow posting to closed periods" in General ledger preferences (GL102000) - or mark the setting "Move invoice in the next open/active period in Supplier ledger preferences (AP101000)."	🔴	8.84.0
Performance improvements on POST Project endpoint	The performance on the POST Project endpoint has now been improved.	🔴	8.96.0
Expense - ERP integration supporting reversed charge on expense receipts	Starting from this version, reverse charge on expenses (services bought abroad) is supported. To implement this functionality, the following settings have to be applied (based on Norwegian template): In the Non-stock items (IN202000) window, set item class to 8 (services). Check whether the right GL accounts are set on the General ledger accounts tab. Set the item type to Expense and mark the item as Reverse charge item. When a reverse charge item is received in the Expense inbox (EP50604S) for a service bought abroad, the processor has to select the right VAT zone: 13 (Services brought abroad). When processed, the purchase invoice will contain the Tax IDs 86 and 86R and the tax is not calculated from the gross amount. When the service is bought domestic, it is handled as a normal expense item in the Expense inbox.	🔴	8.90.0
Transactions excluded from the Convert purchases to assets window	In the Convert purchases to assets (FA504500) window, the following transactions will not be displayed any more: - Reversed transactions: the information that it is reversed is in the debit adjustment document of the original document - Reclassified transactions: if the reclassified transaction is on another account, the transaction won't be displayed when choosing the reclassified account and when choosing the original account. If the reclassified transaction is not on another account, the information from the reclassification transaction will be displayed. - Corrected transactions via the Correct action: only the corrected transaction will be displayed.	🔴	8.94.0
Wrong currency and incorrect cross rate shown for foreign prepayments	In the previous versions, a wrong currency and incorrect cross rate were shown for foreign prepayments. This has now been fixed.	🔴	8.25 (200908)
Error when using the function Load documents in Process bank transactions window	When creating a payment and clicking the function Load documents in the Process bank transactions (CA306000) window, you got an error message if the customer/supplier did not have any open documents. This has now been fixed.	🔴	9.84.0
Currency rates not used in Expense receipts (EP301010)	Earlier, when an expense receipt (EP301010) was created in a foreign currency, the currency rate was not fetched. This has now been fixed.	🔴	9.87.0
Delete reconciliation statement when having own number sequence per cash account	When having own number sequence for reconciliation statement per cash account and you deleted a reconciliation statement (CA302000) with a reconciliation number that also existed for other accounts, the transactions for all accounts were released, so they showed up in a new reconciliation statement. This has now been fixed.	🔴	9.78.0
Schedule not working in Validate project balances	Validate project balances (PM504000) window: When you had added a new schedule and tried to run it, you got an error message saying ""Error: The Run schedule button is disabled.". This has now been fixed.	🔴	9.85.0
Improvement of the status reason shown in Autopay inbox	The status reason field in the Autopay inbox (CA50400S) showed too much information. This has now been fixed and only relevant information will be shown.	🔴	9.70.0
View transactions button on tabs in the Projects window not populating filters automatically	After version 9.63, in the Projects (PM301000) window the View transactions button in the Cost budget, Revenue budget and Balances tabs did not automatically populate the Project, Account group, Project task and Item ID filters. This has now been fixed.	🔴	9.65.0
Creating an archive including more than 1000 files in Download attachments window (SM508090)	In previous versions, you received an error message when you generated an archive in the Download attachments window (SM508090) that included more than 1000 files. This has now been fixed.	🔴	9.65.0
Creating an archive including a corrected document in Download attachments window (SM508090)	In previous versions, you received an error message when you generated an archive in the Download attachments window (SM508090) that included a corrected document. This has now been fixed.	🔴	9.65.0

Wrong period posted when Release time card from Approval is used	In previous versions, when the setting "Release time cards from Approval" in Time and expenses preferences (EP101000) was in use and the time card had been approved, the journal transaction batch got the financial period from the date the transaction was entered and not from the transaction date on the time card transaction lines. This has now been fixed.	🔲	9.68.0
Additional information in Process bank transactions window	In some cases, additional information were not shown at the transactions in the Process bank transactions window. This has now been fixed.	🔲	9.61.0
Override the number series of customer payments created via API	You are now able to override the number series of customer payments by specifying the field overrideNumberSeries=true when creating a customer payment via API. This functionality must be enabled in the Number series (CS201010) window by selecting the "Allow manual numbering on imports" option.	🔲	9.61.0
Import of incoming payment files from Autopay.	Add extra checks to make sure the same file can not be imported more then once from Autopay when using the split function for large incoming payment files.	🔲	9.56.0
Incorrect total count in Employee endpoint/GET /api/v1 /employee request	In the Employee endpoint/GET /api/v1/employee request, the total count was incorrect. This caused the Visma 360 app to stop retrieving pages. The problem has now been fixed.	🔲	9.60.0
Override the number series of cash transactions created via API	You are now able to override the number series of cash transactions by specifying the field overrideNumberSeries=true when creating a cash transaction via API. This functionality must be enabled in the Number series (CS201010) window by selecting the "Allow manual numbering on imports" option.	🔲	9.61.0
Performance improvement on project invoice reports PM64101S, PM64102S, PM64104S, PM64105S, and PM64118S	There are performance improvement on the following project invoice reports: PM64101S, PM64102S, PM64104S, PM64105S, and PM64118S. The changes will only affect the standard report. If the report has been customised earlier, this has to be redone based on the new standard that includes the improvements.	🔲	9.50.0
Wrong field name corrected in Reverse not yet invoiced transactions	In the Reverse not yet invoiced transactions (PM505000) window, the field Invoicing rule was erroneously named as Allocation rule. This has now been fixed.	🔲	9.41.0
Unable to load documents or select all documents in Process bank transactions	Previously, in the Process bank transactions (CA306000) window when using the 'Load documents' button or the 'Select all documents' button in the Select documents pop-up window the system was not loading or selecting any documents even if there were open documents available. This has now been fixed.	🔲	9.37.0
Batch payments not matched if one of the payments had a higher amount than the open balance of the invoice	The processing of incoming batch payment files was stopped if one of the payments had a higher amount than the open balance of the invoice/credit note. This has now been fixed. When the incoming batch payment files contain payments with a higher amount than the invoice/credit note open balance, the system will exclude the specific invoice from the processing and continue processing the rest of the payments. The excluded amount will be available for manual handling in the Process incoming payments (AR305000) window.	🔲	9.40.0
Override payment method for bank processing selected when trying to process bank transactions	Earlier, when using the setting Override payment method for bank processing and trying to process bank transactions (CA306000) or incoming payments (AR305000), the system was showing the error Payment method cannot be found in the system or No business account selected. This has now been fixed.	🔲	9.20.0
Application amount does not match applied lines in Process bank transactions window	Previously, when matching a bank transaction with an invoice, the system was recognising the application amount but it was not showing the applied lines in the Process bank transactions (CA306000) window. This has now been fixed.	🔲	9.32.0
Not possible to mark transactions as Reconciled on the Reconciliation tab in the Fixed asset window (FA303000)	Earlier, it was not possible to mark one or more transaction lines as reconciled in the reconciliation tab in the Fixed asset (FA303000) window when selecting addition and deduction. This has now been fixed.	🔲	9.48.0
After Match to invoice is done in Process bank transactions window, it switches to tab Match to payment	After matching to invoice was done in the Process bank transactions (CA306000) window, the window was switching to the tab Match to payment - also when selecting a matched line on the left side of the window, the right side of the window was switching to the Match to payment tab. This has now been fixed.	🔲	9.08.0
Error in showing all documents in the Reference nbr. lookup column in Process bank transactions and Process incoming payment windows	When creating a payment for a customer/supplier in the Process bank transactions and Process incoming payment windows and you would want to select the documents in the grid by opening the Reference nbr. column, all documents for all customers were showing up in the selection pop-up. This has now been fixed and now only the relevant documents corresponding to the selected customer/supplier are visible in the selection pop-up.	🔲	9.08.0

Error message when selecting period 13 (Adjustment period) in revaluation windows	Earlier, you received an error message when you selected period 13 (Adjustment period) in the Revalue general ledger accounts (CM506000), Revalue supplier accounts (CM504000) and Revalue customer accounts (CM505000) windows and the revaluation could not be processed. This has now been fixed and the date is automatically set when you select period 13.	▣	9.09.0
Fix for the release of expense claims from Expense Inbox	There was an issue on the release of expense claims from Expense Inbox which didn't transfer the project field on the purchase invoice. This has now been fixed.	▣	9.07.0
Description reset on time cards for projects after correction	Earlier, when the description on a line with project and project task had been modified and the time card then was corrected (EP305000) , the description defaulted back to the project task description. This has now been fixed.	▣	9.80.0
Assets not displayed in Fixed asset net value report	Earlier, there was an error in the Fixed asset net value (FA613000) report. Some assets were not shown in the report. This has now been fixed.	▣	8.99.0
Incorrect syntax in converting purchases to assets	After reclassifying a transaction from one account to another and then opening the Convert purchase to asset (FA504500) window, there was the error "Incorrect syntax near ')'". This has now been fixed.	▣	8.91.0
Incorrect data on Fixed asset net value report	Earlier, the Fixed asset net value (FA613000) report contained some incorrect data. This has now been fixed.	▣	8.92.0
Currency effective date in Currency revaluation windows	The suggested Currency effective date for the windows Revalue general ledger accounts (CM506000), Revalue supplier accounts (CM504000), and Revalue customer accounts (CM505000) were set to, for example, 30/01/2022 instead of expected 31/01/2022. This has now been fixed.	▣	8.84.0
Error "TaxBucketID cannot be empty" needs healing script	Due to the new VAT changes for Norway in 2022, there is an issue with releasing or processing expense claims registered in 2022, which have expense receipts in 2021. The release process is stopped and has error message: "TaxBucketID cannot be empty". The customers that have this problem will need to contact support which can fix this issue by running a script in the Healing Service: UpdateWrongEmptyTaxBucketID.	▣	8.82.0
Performance improved on the Fixed asset - net value (FA613000) report	The performance of the Fixed asset - net value (FA613000) report has been improved so that it works faster even with big data.	▣	8.85.0
Removed American column Sect. 179 in Fixed assets classes	The column "Sect. 179" used in American systems is no longer visible in the Fixed assets classes (FA201000) window.	▣	9.69.0
Process incoming payments now using booking date as transaction date	Due to a change in xml in February, the transaction date in the Process bank transactions (CA306000) window was taken from Value date field in the XML file. This has now been changed and the value date is now updated to the Transaction entry date field for information.	▣	8.92.0
Fixed error of currency change on invoice line in Process bank transactions window screen	Earlier, in the Process bank transactions (CA306000) window, there was an error when you selected a sales invoice in currency, split the line and automatically matched the split line to a rule: The currency on the invoice line was changed to cash account currency. This has now been fixed and it will always show the currency of the sales invoice.	▣	9.12.0
Duplicated error message in Revalue supplier/customer accounts removed	Earlier, you got a duplicated message in Revalue supplier accounts (CM504000) or Revalue customer accounts (CM505000) windows, if the selected period and/or the next period was inactive. This has now been fixed and you only get the message one time.	▣	8.65.0
Name from bank and Account from bank filled out in handling of incoming payments	Earlier, the Name from bank and Account from bank columns were not filled out in the Import incoming payments (AR305500) and Process incoming payments (AR305000) windows. This has now been fixed.	▣	8.62.0
Unhide/Hide in CA306000 and AR305000 not working as expected	Earlier, the Hide checkbox was not selected properly when a line was not selected first. This problem has now been fixed in the Process incoming payments (AR305000) and Process bank transactions (CA306000) windows.	▣	8.83.0
Note text on project tasks get overwritten when using common tasks	Earlier, the note text on project tasks got overwritten when using common tasks. This has now been fixed and the following scenarios are taken into account: - if a common task is created with notes on the Budget tab (for Revenue or Cost) in the Projects (PM301000) window, then only when creating new projects with this common task, the notes should be transferred and visible on the Revenue or Cost budget tab. - if the notes from the common task are updated in a project, it should not update all projects that are using this common task and it should not update the original common task, either. Moreover this also applies to Project template tasks with notes on the Revenue or Cost budget.	▣	8.73.0

Commitment amount incorrect in Projects window when reverse VAT was used	Earlier, when using reversed VAT on purchase orders, the Commitments tab in the Projects (PM301000) window was showing incorrect values. This has now been fixed.	🔲	9.10.0
Selecting an inactive customer location for new projects	Earlier, it was possible to select an inactive customer location for new projects (PM301000). This has now been fixed.	🔲	9.81.0
Warning message wrongly shown in Process bank transactions	In the Process bank transactions ((CA306000) window, a warning message is shown if the application amount is different from the received amount. In some cases, this warning message remained after the user had corrected it, and the application amount and the received amount were equal. This has now been fixed.	🔲	9.79.0
Release of Sales Invoice does not update actual amount on project balance and revenue budget	In previous versions, the Actual amount field from Project window on the Balance tab and Revenue budget tab was not updated properly after releasing sales invoices (AR301000). This issue has been fixed and the Actual amount is automatically updated after refresh of project window	🔲	8.58.0
Releasing project proforma invoice with project specific sales account now transferring correctly the sales account on the sales invoice	In previous versions, when releasing a project proforma invoice that used a sales account specified on the project, it would create a sales invoice with a wrong sales account taken from the customer instead of the project. This issue has been fixed and now the correct sales account specified in the proforma invoice is transferred to the sales invoice.	🔲	8.63.0
Project validation on cash transaction checking if account is in account group or not	In previous versions, you were able to create cash transactions with projects on accounts that are not included in account groups. This issue has been fixed by adding validation on project, which checks if the account is included in an account group or not.	🔲	8.57.0
Correct status for a fully depreciated fixed asset	Earlier, a fixed asset got the status Active when it was entered as fully depreciated. This has now been fixed and the status is set to Fully depreciated.	🔲	8.47.0
Calculation of revised budgeted amount in Validate project balance window for recalculation of change orders	Earlier, if a budget line in the Project ((PM301000)) window on the Revenue budget or Cost budget tab had the budgeted quantity 0, the revised budgeted amount was wrongly recalculated by adding the change order's amount multiple times every time when using the Validate project balance (PM504000) window for recalculating of change orders. This has now been fixed.	🔲	8.45.0
Select documents pop-up in Process bank transactions and Process incoming payment windows not showing/loading documents	The Select documents pop-up in the Process bank transactions (CA306000) and Process incoming payment (AR305000) windows did not show/load the documents when a pipe was a part of a reference number or description on the invoice (customer and supplier). This has now been fixed.	🔲	9.81.0
Error in Autopay inbox when having a prefix	Earlier, you sometimes got the error "Index and length must refer to a location within the string" in the Autopay inbox (CA50400S) window when you had a prefix. This has now been fixed.	🔲	8.43.0
Expense claims with empty Purpose field not received in Expense Inbox	Earlier, when the Purpose field in expense claims from Visma.net Expense was left empty, the messages were not received in Expense Inbox in Visma.net ERP for Swedish customers. This has now been fixed by automatically inserting the description of the claim only on transactions which have this Purpose field empty.	🔲	8.73.0
Purchase orders with discounts showing correctly on project's commitments tab	Purchase orders with discounts were not showing the correct value for the order total field in the Project (PM301000) window on the Commitments tab. This has now been fixed.	🔲	8.77.0
Revised budgeted amount and quantity in Projects window after posting of actual transactions	Earlier, there was an issue after releasing transactions with actual amounts and/or quantities. The Revised budgeted amount and quantity on the budget line in the Projects window (PM301000) were set to 0. This has now been fixed.	🔲	8.42.0
Total time spent and Time spent calculated incorrectly in Release time cards window	Earlier, the Total time spent and Time spent were not calculated correctly in the Release time cards (EP505010) window for time cards with over 100 hours. This has now been fixed.	🔲	8.72.0
Purchase invoices without VAT now visible on Supplier invoice tab in Project window	Earlier, purchase invoices without VAT were missing from the Supplier invoice tab in the Project window (PM301000). This has now been fixed.	🔲	8.51.0

Allocation posting date is considered when allocation rule has Date source: Allocation date specified	There was an issue when posting allocation transactions on projects using the Posting date from Run allocation by project and Run allocation by task windows. Now this has been fixed and the Run allocation by project and Run allocation by task windows are now considering the Posting date for allocation transactions if the Allocation rule has the Data source: Allocation date specified.	▣	8.66.0
Filter on empty status in Process bank transactions window	You can now use filter "Is null" or "Is not null" for the Status column in the Process bank transactions (CA306000) window.	▣	8.40.0
Easy import and linking of all expense types to non-stock items	The import scenario "Import Expense types NO, FI, SE" has been updated with the ExternalID field so that you can import and link all expense types to non-stock items easier and efficiently.	▣	8.43.0
FIK payments not extracting invoice no. for automatic matching in processing of payments	Earlier, when receiving an incoming payment with a FIK code (CID code), the invoice number was not extracted from the FIK code and placed in the Invoice no. field in the Process payment (CA306000) window in Danish companies. So the incoming payment did not match the invoice. This has now been fixed and incoming payments are matched to invoices.	▣	8.39.0
New changes on Visma.net Project Advanced Allocation and Billing	The Run allocations by projects window (PM502500) and Reverse not yet invoiced transactions window (PM505000) are now only available Visma.net Project Advanced Allocation and Billing for Project Controller and Project Manager roles.	▣	8.34.0
Create payment from cash account in foreign currency	There was a bug in the Process bank transactions (CA306000) and Process incoming payments (AR305000) windows related to creating a payment from a cash account in a foreign currency. This has now been fixed.	▣	8.37.0
Sales invoice number recognition based on prefixes	The sales invoice number recognition based on prefixes for the Dutch companies has been fixed.	▣	8.32.0
Error when selecting documents with open invoices in closed periods	In the Process bank transactions window, when you clicked the Select documents button, an error occurred if there were open invoices in closed periods. This has now been fixed.	▣	8.32.0
Calculation of revised budgeted amount and revised budgeted quantity in Validate project balance window for recalculation of change orders	Earlier, the revised budgeted amount and revised budgeted quantity were wrongly recalculated by adding the change order's quantity and amount every time when using the Validate project balance (PM504000) window for recalculating of change orders. This has now been fixed.	▣	8.39.0
Preload worked hours from previous timecard	The 'Preload from previous timecard' is now taking, in addition to the type of hours (regular hours and overtime), the projects and tasks, also the hours from the previous time card.	▣	8.34.0
"Hide" check boxes get deselected in the Incoming payments window	There was an issue with multiple "Hide" check boxes getting deselected in the Incoming payments window. This has now been fixed.	▣	8.32.0
Error when closing the multiselect pop-up from [x]	In the Process bank transactions and Process incoming payments windows, two issues have been fixed: 1. Documents were not removed when you closed the Select documents window using the "x" button. 2. An error message that was displayed after you had saved the action above.	▣	8.33.0
Customised ARM report showing correct figures in every run	In previous versions, the customised ARM report was showing incorrect figures in every run. This has now been fixed.	▣	8.34.0
Write-off account set to supplier account if reason code is connected to a cash account	When you were writing off a purchase invoice, and the default supplier write-off reason code used a cash account, the system posted an incorrect accounting entry. This has now been fixed by displaying an error message and not allowing for the transaction to be posted until the account is changed.	▣	8.33.0

The lastModifiedDateTime and lastModifiedDateTimeCondition parameter updated for several endpoints	The lastModifiedDateTime parameter and lastModifiedDateTimeCondition parameter have been updated for the following endpoints: - CashAccount, - CashTransaction - CustomerPayment - Department - Dimension - EarningType - Employee - ExpenseClaim - FixedAsset - FixedAssetTransaction - Project - ProjectBasic - ProjectBudget - ProjectTask - ProjectTransaction - Subaccount - TimeCard	🔴	9.31.0
Double amounts for purchase invoices with reverse VAT in Projects	In previous versions, there was a problem in the Projects window on the Supplier invoice tab which was showing double amounts for the gross amount and net amount for purchase invoices that had reverse VAT. This has now been fixed.	🔴	8.30.0
Schedules created in Release time cards window did not process documents	Earlier, the schedules created in the Release time cards window (EP505010) did not process the documents. This has now been fixed.	🔴	8.74.0
The quantity and amount on Commitments tab now from the specified project	On the Commitments tab in the Project window (PM301000), the values for quantity and amount were showing the total amount from the purchase order. This has now been fixed and the values for quantity and amount are taken from the specified project.	🔴	8.35.0
Company with different base currency reverts back to default after change in Visma.net Admin	When you updated company information or company roles in Visma.net Admin, the base currency was reverted back to the currency from the template. This was an issue for companies where the base currency was changed when running the First Time Startup wizard.	🔴	8.26.0 (8.26.0 8.1036)
Dispatcher says "successfully forwarded to CommonDataService", but this is a lie, at least for AWS. A double / in the url prevents the CDS endpoint from being triggered. Possibly kestrel or AWS is a bit more picky in this area than when hosting on IIS in VITC.		🔴	
Inquiry not showing value if it is under 60 minutes and schemafield Timespent is used	In previous versions, there was an issue when using the schema field PMTimeActivity.TimeSpent in the Generic inquiry window. The field was not showing the correct hours and minutes if the data was not a multiplication of 30. This has now been fixed.	🔴	8.31.0
Invoice numbers based on prefixes not found when importing a CAMT file through Import bank transactions when the cash account has remittance settings from multiple payment methods.	The bug related to invoice recognition based on prefixes when manually importing CAMT files for the Dutch companies has now been fixed.	🔴	8.31.0
Bank transaction rules applied even if an invoice exists with the same amount	Now it is possible to apply the bank rules in the Process bank transactions window if an invoice with the same amount exists by marking the new check box "Display only relevant matches" in the Process incoming payments window.	🔴	9.25.0
Release credit note for a sales invoice created with stock items	In previous versions, it was not possible to release a credit note for a sales invoice created from Project module which had stock items. This has now been fixed.	🔴	8.25 (200908)

Issue with refund applied to a currency document and received payment in base currency	In the earlier version, when you received a supplier refund as an incoming payment and the refund was applied to a currency document in the Process incoming payments (AR305000) window, the received payment was in the base currency, but the applied document was added with the document currency and the match was not correct. This has now been fixed.	🔲	8.25 (20090 8)
Importing CAMT files with currency transactions	Importing a CAMT file with currency transactions resulted in an incorrect amount to be registered to the account statement. This has now been fixed.	🔲	8.25 (20090 8)
The account statements were not imported with all data	In the previous version, we had an issue with importing all details related to bank transactions from an account statements. This is now fixed.	🔲	8.24 (20062 3)
Admincontrol AS - AutoPay file in error	In the previous version, there was an error with processing account statements: "Value cannot be null. Parameter name: source". This is now fixed, and the statements in error state can be reprocessed.	🔲	8.24 (20062 3)
The maximum message size quota for incoming messages has been exceeded when downloading a large incoming payment file from AutoPay	To support incoming payments files with a lot of content and many lines, we have increased the the accepted size for downloading incoming payment files from AutoPay. We have also made it easier to change the accepted size, so that it can be increased further if needed.	🔲	8.24 (20062 3)
Match supplier refunds with credit notes with a future date	The setting "Enable early payments, no check on invoice date" in the Supplier ledger preferences (AP101000) window now also works for matching supplier refunds with a purchase credit note on a future date.	🔲	8.24 (20062 3)
Incorrect status for a reversed fixed asset after setting it On hold	Earlier, when you changed the status on a fixed asset Reversed, then set it on hold and then removed the Hold check box, the fixed asset was set to Active. This has now been fixed and the status is set to Reversed.	🔲	8.46.0
New columns for proforma in the Projects window	To have a better understanding of the figures in the base currency and customer currency, there are now three new columns on the Customer invoice tab in the Project window: "Proforma customer currency", "Proforma gross amount in customer currency", and "Proforma net amount in customer currency". The existing column "Proforma gross amount" has been renamed to "Proforma gross amount base currency" and "Proforma net amount" to "Proforma net amount base currency"	🔲	8.25 (20090 8)
Correct values on proforma invoice reports	On the proforma invoice reports (PM64202S, PM64204S, PM64205S and PM64218S), the field 'Previously invoiced' now shows the correct values and the header has been changed to 'Previously invoiced (currency)'.	🔲	8.24 (20062 3)
Invoice generated in Project accounting can be sent to AutoInvoice	It was not possible to send an invoice generated in Project accounting to AutoInvoice in previous versions. This has now been fixed.	🔲	8.23 (20060 9)
Used branch from the cash account when creating transactions - instead of the active branch	For multi-branch companies, the payments created in the windows 'Process bank transactions' (CA306000) and the 'Process incoming payments' (AR305000) are now posted on the branch of the cash account.	🔲	8.24 (20062 3)
Foreign currency payments incorrectly show open amount on the balance per supplier (currency)	When processing bank transactions in a foreign currency in the Process bank transactions window (CA306000), a balance discrepancy was created on the invoice, which displayed incorrect information in the Balance by supplier (AP63250S) and Balance by supplier (currency) (AP63300S) reports. This has now been fixed.	🔲	8.29.0
"Exclude from AutoPay" action in Autopay Inbox	In Autopay Inbox, you can use the "Exclude from AutoPay" action, for account statements and incoming payments which should not be imported into the system. The action will exclude these files from processing and the import will not be done. Upon processing, the excluded files are visible using the Inbox status "Validated".	🔲	8.25 (20090 8)
Override payment method for bank when auto-matched on the Create payment tab	By using the option 'Override payment method for bank processing' in the 'Cash management preferences' (CA101000) window, you override the payment method when creating payments from the 'Create payment' tab in the 'Process bank transaction' (CA306000) window.	🔲	F2020 05
Automatic population of ItemID field in the Project transactions window	In previous versions it was possible to save Project transactions with an empty ItemID field, which caused problems during the project billing process. This is now fixed. If the ItemID is manually deleted it is automatically set to <N/A> when you move to another cell. The field is not left empty.	🔲	8.24 (20062 3)

"Project Description" and "Description" of the line fields now updated correctly on the Timecard	The "Project Description" and "Description" of the line fields are now updated correctly on the Timecard (EP305000), when a default project and task is set in the Type of hours screen (EP102000).	🟧	8.22 (200526 Release)
Expense receipt link on the Expense claim (EP301000) and Expense inbox window (EP50604S) now opens corresponding receipt.	The link of the Expense receipt in the Expense claim (EP301000) and Expense inbox window (EP50604S) is now opening the corresponding receipt.	🟧	8.22 (200526 Release)
Navigate from Generic inquiry (CABankTran) to Process bank transactions window	Navigation from a generic inquiry from CABankTran to the Process bank transactions (CA306000) window has now been fixed and you can crate a navigation without a parameter. The window will open without error.	🟧	8.25 (200908)
Template company copies cash accounts but not branches	When creating new companies from a template, the cash accounts belonging to other than the main branch will not be copied. This fixes the issue of having some cash accounts with no link to their branch.	🟧	8.32.0
Fixed asset balance by general ledger account report corrected	The 'Fixed asset balance by general ledger account' (FA643000) presented wrong information. This is now fixed.	🟧	F202005
Release of rejected direct debit payments	In the previous version, when the 'Skip voided transactions during matching' check box was selected in the 'Process bank transactions'(CA306000) window, the rejected direct debit payments were created but not released. This is now fixed.	🟧	F202005
The account statement lines are imported several times when the XML file contains 'Additional Information'	In the previous versions, when the account statement lines contained 'Additional information', a duplicate line was created. This is now fixed, the 'Additional information' is available in the Import Bank Transactions (CA306500) window.	🟧	8.23 (200609)
Wrong calculation with depreciation method "Dutch method 2" and salvage amount	When the fixed asset had a salvage amount, calculation was done wrong when using the depreciation method "Dutch method 2". This has now been fixed.	🟧	8.32.0
Fixed upload account statement for foreign IBAN	In the previous version, the system allowed upload of CAMT files only for Dutch bank accounts. Now, the system supports upload of CAMT files for all bank accounts.	🟧	F202005
Improved 'Restrict project selection' field	For a better understanding of the 'Restrict project selection' field in the Project accounting preferences (PM101000) window, the field has been renamed to 'Restrict available projects in customer ledger' and the drop-down option has been changed to "Projects with a customer". This field only restricts the project selection list in the Customer Ledger workspace.	🟧	8.23 (200609)
The 'Previously invoiced' field on the proforma invoice report shows the correct values.	On the proforma invoice report (PM64204S), the field 'Previously invoiced' now shows the correct values and the header has been changed to 'Previously invoiced (currency)'.	🟧	8.22 (200526 Release)

264 opgaver

Customer Ledger

Release Notes.	Documentation	T	Ret versi
Parent invoicing functionality enabled for Pilot customers	It is now possible for you to decide whether to automatically address invoices created from child customers' orders to the parent account in accordance with some of the parent account's settings. When Parent-child customer relationship is enabled in the Enable/disable functionalities (CS100000) window, you can set up sending invoices for a customer's orders to the parent account, by selecting the Consolidate invoices check box for the child customer in the Customers (AR303000) window (in the Parent info section of the Invoicing settings tab). Invoices that are created from orders for the child customer in the Sales orders (SO301000) window will then be addressed to its parent account and sent to them when you send the invoice. This functionality will be available in the beginning only for Pilot customers.	☑	9.74.0

Business-level status changes in the sender's ERP system for Customer invoices (SO303000)	When sending to AutoInvoice from the Customer invoices (SO303000) window, you receive a response message in the "Business level status" field in the "Invoice address" tab, the "AutoInvoice" section. The possible responses from Peppol from other ERP systems can be the following: * Status Business level response code * Status Reason codes * Status Action codes * Free text field	☑	9.68.0
"Search" placeholder in search line columns where you can type search terms	In the list window search line, the white columns now have the placeholder "Search". This makes it easier for you to see that you can type a search term there.	☑	9.67.0
Support for correcting invoices in Sales invoices window	There is a new functionality for correcting invoices in the Sales invoices (AR301000) window, which do not originate from the Sales orders (SO301000) or Shipments (SO302000) windows.	☑	8.73.0
As a supporter I want to use the Healing tool to set Claimed status on invoices that having wrong claim status.	New script in Healing tool 'UpdateInvoiceAsClaimed' where you can select one or more RUTROT invoices that have claimed status set to FALSE (0) and it should have been TRUE (1). Select the Run Diagnostic script and you will get a list of all Invoices having status FALSE and you can use the check-boxes to select the invoices you want to change status for.	☑	
Columns in Customer details window not translated	In the Customer details (AR402000) window, some column names were shown in English instead of the language selected by user. This has now been fixed.	☑	9.27.0
Show number of records in more windows	The Show number of records functionality has been implemented for the following windows: AP402000 - Supplier details AP501000 - Release supplier documents AR402000 - Customer details AR501000 - Release customer documents AP50300S - Process payments CA306000 - Process bank transactions	☑	8.24 (200623)
Invoice-English report now uses payment settings details from payment method if bank account type is set	In the Invoice-English (AR64101S) report, the following change has been implemented: The report will use the payment settings details from the: - Payment methods (CA204000) window, when the bank account type is set for the payment method, - Organisations (CS101500) or Branches (CS1020PL) window, when the bank account type is not set for the payment method. This is in order to avoid discrepancies between invoice reports and the PEPPOL BIS XML file.	☑	9.59.0
Invoice-Danish report now uses payment settings details from payment method if bank account type is set	In the Invoice-Danish (AR64106S) report, the following change has been implemented: The report will use the payment settings details from the: - Payment methods (CA204000) window, when the bank account type is set for the payment method, - Organisations (CS101500) or Branches (CS1020PL) window, when the bank account type is not set for the payment method. This is in order to avoid discrepancies between invoice reports and the PEPPOL BIS XML file.	☑	9.59.0
'Invoice, Swedish left address' report now uses payment settings details from payment method if bank account type is set	In the Invoice, Swedish left address (AR64108S) report, the following change has been implemented: The report will use the payment settings details from the: - Payment methods (CA204000) window, when the bank account type is set for the payment method, - Organisations (CS101500) or Branches (CS1020PL) window, when the bank account type is not set for the payment method. This is in order to avoid discrepancies between invoice reports and the PEPPOL BIS XML file.	☑	9.60.0
Invoice-Swedish report now uses payment settings details from payment method if bank account type is set	In the Invoice-Swedish (AR64118S) report, the following change has been implemented: The report will use the payment settings details from the: - Payment methods (CA204000) window, when the bank account type is set for the payment method, - Organisations (CS101500) or Branches (CS1020PL) window, when the bank account type is not set for the payment method. This is in order to avoid discrepancies between invoice reports and the PEPPOL BIS XML file.	☑	9.60.0

Invoice-Norwegian report now uses payment settings details from payment method if bank account type is set	In the Invoice-Norwegian (AR64104S) report, the following change has been implemented: The report will use the payment settings details from the: - Payment methods (CA204000) window, when the bank account type is set for the payment method, - Organisations (CS101500) or Branches (CS1020PL) window, when the bank account type is not set for the payment method. This is in order to avoid discrepancies between invoice reports and the PEPPOL BIS XML file.	☑	9.59.0
New search line in all list windows	In all list windows, a search line has been implemented in the table to replace the search field in the upper right corner. There is a distinction between white and grey columns: - In the white column, you can type your exact search term to display results containing this exact value. - When you click on the grey column, you can filter as before in the column filter pop-up. You can search and filter in as many columns as you need to, to only display the results you want to view.	☑	9.64.0
Global search no longer searches in columns not visible in the grid in inquiry windows	When using global search from top right corner on any generic inquiry screen (list screens), the system will no longer search in columns that are not visible in the grid. This is done to improve the loading performance of the screens and to show only relevant documents as result in the grid.	☑	9.57.0
Improved performance in the Sales invoices window	For invoices with multiple pages of lines, loading the Sales invoices (AR301000) window and going to the next page is 20 % faster than before.	☑	9.56.0
Customer write-off works without setting the write-off account as control account.	Customer write-off works as before and you do not need to set the write-off account as control account for Customer ledger. If you want to use supplier write-off, you need to set the write-off account to 'Supplier ledger and Customer ledger' if the same account is used. If this account is also the default rounding account, you must select 'Allow manual entry' in addition.	☑	
New check box 'Show closed documents' in Sales invoices list window	A check box 'Show closed documents' has been added to the Sales invoices (AR3010PL) list window. You can select this check box to include documents with the Closed status in the table, and you can clear the check box to hide these documents from the table. By default, the check box is cleared. The time it takes to load the window has shortened significantly by not showing the closed documents, depending on the amount of records in the system. This check box is only available if the window has not been customised. If you have customised this window, you can add the check box manually in the generic inquiry as a new parameter and condition.	🔖	9.57.0
Improved performance in the Sales price worksheets window	Releasing a sales price worksheet in the Sales price worksheets (AR202010) window is now approx. 29% faster.	🔖	9.69.0
Improved performance in the Sales prices window	The performance in the Sales prices (AR202000) window has been improved for several actions and processes: - Loading the window is approx. 22% faster - Loading the next page is approx. 5% faster for price types 'All prices' and 'Customer price class' - Create price worksheet is approx. 2% faster.	🔖	9.69.0
Releasing time in Release customer documents window improved by 10%	The releasing time for an invoice with 100 lines in the Release customer documents (AR501000) window has been improved by approximately 10%. Earlier, when you released 100 sales invoices with 100 lines, it took approximately 11 min for each invoice. Now, it takes 9 min and 43 sec per invoice.	🔖	9.65.0
Improved performance in the Customer invoices window	The performance in the Customer invoices (SO303000) window has been improved for several actions and processes: - Loading the window and page lines navigation is approx. 15% faster - Sending to AutoInvoice is approx. 40% faster - Release process, print invoice process and more (no measurements available).	🔖	9.67.0
Releasing time in Sales invoices window improved by 10%	The releasing time for an invoice with 100 lines in the Sales invoices (AR301000) window has been improved by approximately 10%. Earlier, when you released 100 sales invoices with 100 lines, it took approximately 11 min for each invoice. Now, it takes 9 min and 43 sec per invoice.	🔖	9.65.0

VAT category update for existing sales invoice lines when changing customer or customer location	Earlier, when you changed the customer or customer location on a sales invoice with existing lines, the VAT category would not be updated if the customer or location had a different VAT zone or Export type. For this scenario, the following new functionality has been implemented: - For Norway, Sweden and Denmark, the VAT category will be updated automatically. - For the Netherlands and Finland, you can choose to update the VAT category automatically by selecting the check box "Recalculate VAT when customer or supplier is changed on document" in the VAT information tab in the Organisations (CS101500) window.	🔖	9.53.0
Process customer refund without having the refund applied to any document.	You have now the possibility to save and release a customer refund without having the refund applied to any document.	🔖	9.74.0
Drill-down from reference number and View payment button	When you press the reference number on the Applications tab in the Sales invoices (AR301000) window, the window where the document is created will open, either Customer payments (AR302000) or Customer invoice (SO303000). The View payment button will open the Customer payments (AR302000) window showing the application or payment.	🔖	9.24.0
Tabs 'Attributes' and 'Marketing lists' removed from Contacts window	The tabs 'Attributes' and 'Marketing lists' have now been removed from the Contacts (CR302000) window, since the functionality is not in use.	🔖	9.87.0
Performance improvement for the Process customer refunds window	Earlier, it took a long time before the Process customer refunds (AR50300S) window opened. When there were many transactions (over 9500), it could take more than 10 minutes. This has been resolved and now the opening of the window takes less than 10 seconds for this amount of transactions (more than 60 times faster!).	🔖	8.95.0
Performance issue in the Sales price worksheets window	Earlier, there was a performance issue when releasing a large amount of transactions in the Sales price worksheets (AR202010) window. This has now been improved and the release time is reduced by approximately half.	🔖	9.10.0
Outdated B2C functionality for customer phone number removed in Customer ledger preferences	Earlier, in the Customer ledger preferences (AR101000) window, on the AutoInvoice settings tab, the outdated Customer phone number field was available for the B2C functionality. This field has now been removed.	🔖	8.80.0
Cancel AutoInvoice B2C service in Visma.net ERP	You are now able to cancel the AutoInvoice B2C service in the UI in Visma.net ERP.	🔖	8.86.0
Business-level status changes in the sender's ERP system for invoices	To enable the company to support invoice response messages, activate it in the AutoInvoice settings (CS10250S) window in the "Invoice response messages" section. The invoices are sent to AutoInvoice from the Sales invoices (AR301000) window. After that you receive a response message in the "Business level status" field in the "Invoice address" tab, the "AutoInvoice" section. The possible responses from Peppol from other ERP systems can be the following: * Status Business level response code * Status Reason codes * Status Action codes * Free text field See the Peppol documentation for details on all codes: https://docs.peppol.eu/poacc/upgrade-3/profiles/63-invoiceresponse/	🔖	9.67.0
Option added to exclude the invoice PDF from the PEPPOL BIS invoice for each specific recipient	Earlier, the PEPPOL BIS invoice always imbed the invoice PDF. Based on the European Standard EN16931, the recipient of the electronic invoice can specifically ask not to have the PDF of the invoice included. This is now possible via a new setting in the Customer classes (AR201000) and Customers (AR303000) windows with a setting to exclude the invoice PDF. This setting is only visible when you have enabled PEPPOL invoice in the Customer ledger preferences window (AR101000). This enables the possibility to not generate and imbed invoice PDF while sending electronic invoices via the PEPPOL BIS invoice format, which will greatly improve performance when batch sending a large quantity of invoices. Performance improvement when excluding the invoice PDF on invoices with 1-5 lines shows processing time for each invoice will be reduced to half on our test environment. Difference will be larger for invoices with more lines.	🔖	8.61.0
Send 300 000 invoices to AutoInvoice during a month	Earlier, it was not possible to process a large amount of invoices in the Send invoices (AR508000) and Reprint invoices (AR50801S) windows. This has now been fixed.	🔖	9.01.0

New columns for individual segments of subaccount string in Inventory transactions by account inquiry	There are new columns for individual segments of the subaccount string available in the Inventory transactions by account (IN403000) window.	🔖	8.71.0
New columns for individual segments of subaccount string in Customer vat zone deviation (customer sub) inquiry	There are new columns for individual segments of the subaccount string available in the Customer vat zone deviation (customer sub) inquiry (AR40102S) window.	🔖	8.71.0
New columns for individual segments of subaccount string in Sales by item and customer inquiry	There are new columns for individual segments of the subaccount string available in the Sales by item and customer inquiry (AR40103S) window.	🔖	8.71.0
Description of VAT code visible on invoice lines	You can now see the description of the VAT code in the Sales invoices (AR301000) and Customer invoice (SO303000) windows, on the VAT details tab so that it's easier to understand which VAT code is selected on the invoice lines.	🔖	8.53.0
Peppol BIS 3.0: New additional scheme IDs for Finnish organisation number and VAT number.	There are new additional scheme IDs supporting the newest version of Peppol BIS 3.0, which also align with the code list EN 16931. Earlier, only scheme ID 0037 was available for Finnish identifications, but 0037 is only used for Finnish e-invoice address and not for organisation number and VAT number. With the new scheme IDs you are now able to set the correct identification for Finnish organisation number and VAT number. The new scheme IDs are: 0212 - Finnish Organisation Identifier 0213 - Finnish Organisation Value Add Tax Identifier	🔖	8.49.0
PEPPOL used as default invoice type for Swedish customers	From this version on, PEPPOL will be used as the default invoice type for all Swedish customers. This only applies to new companies.	🔖	8.44.0
Customer feedback on end user documentation	It is now possible for a user to give feedback on our end user documentation. By introducing the customer feedback feature in Help Centre, we're hoping to get to know our users a little better and understand how they use our help. This is important for us in order to improve our documentation. We will start with the top 20 most visited help articles. This feature will be available in version 8.42.	🔖	8.42.0
Improved performance in multiple areas inside the O2C domain	There are generic performance improvements in the data access layer, which will affect all functionality (applies to API, screens, generic inquiries, and reports) in the following areas inside the O2C domain: Discounts, Payment methods, Customer prices, Attributes, Customer, Customer classes, Customer invoice, Sales invoice, Incoming payments, Freight handling, and sending of electronic invoices (Visma XML and Peppol BIS 3.0). The effect of this will vary based on document size or the entity you are working on, and the number of documents and entities existing in your company. It applies to retrieving, creating, and updating data, and affects logical scans and scan counts in the SQL server in a very good way. Some of these changes will also have a positive effect on areas outside the O2C domain, that are referring to these documents or entities.	🔖	8.50.0
New work types and a new standard allowance for RUT deduction	There are new work types added for RUT deduction: - Furniture - Supervision of housing - Transport to sales - Laundry Also, the standard allowance for RUT has been changed to 75 000 SEK. In order to use the new value, go to the Organisations (CS101500) window and disable/enable the "Uses ROT & RUT deduction" check box on the Domestic services settings (Sweden) tab.	🔖	8.45.0

New field "Branch" available when using the Customer endpoint	A new field "Branch" is available when using the Customer endpoints on the following operations: - GET api/v1/customer/{customerCd} - GET api/v1/customer/internal/{internalID} - GET /api/v1/customer - PUT api/v1/customer/{customerCd} - PUT api/v1//customer/internal/{internalID} - POST /api/v1/customer	🔖	9.80.0
The Release customer documents window is missing branch information	Earlier, the Release customer documents (AR501000) window was missing branch information. This has now been fixed.	🔖	9.04.0
Map cash discount fields to Peppol BIS 3.0	When using e-invoices in Peppol BIS 3.0 format, we have added mapping for cash discount information. This information will be used when the Peppol file is converted to local formats (such as Finvoice), and the local format contains fields with such information.	🔖	8.26.0 (8.26.0 8.1036)
As a customer I want to be able to send the Peppol BIS 3.0 XML to Visma support for them to investigate issues with my electronic invoice and find a solution when I start using Peppol BIS 3.0	In the Sales invoices (AR301000) and Customer invoice (SO303000) windows, there is a new action called "Generate e-Invoice XML draft". This action will generate a draft version of the Peppol BIS 3.0 XML, so that you have the possibility to check the content and validate that all settings are correct, before you start using the Peppol BIS 3.0 format for electronic invoicing. The action can be used on all statuses except "On hold", and becomes available if Peppol BIS 3.0 is activated and you have enabled the setting "Send to Autoinvoice". Note! This action is only applicable when Peppol BIS 3.0 is enabled, and the generated electronic invoice should be reviewed as a draft or a copy, not as a legal document.	🔖	8.25 (20090 8)
Move customisation for tables and DACs to pure for Customer invoice (AR301000)	We have optimised the invoices windows (AR301000 and SO303000) and the related tables, to get a better performance when working in these windows. The performance of the windows/API is now 10% faster (tested with document containing 100 lines).	🔖	8.25 (20090 8)
Implement a new inquiry, Invoices history by items, based on the Sales order history by items inquiry	There is a new inquiry implemented, called "Invoices history by items", to help users to see the AR sales by item based on all AR invoices. The new screen ID is AR40105S.	🔖	8.25 (20090 8)
Improvements in the contract routine	CT201000 - Contract items New field "Active". You can now mark a contract item as "Inactive" by removing this flag. CT202000 - Contract templates Inactive contract items will not be available for use on the Details tab. A selected item will be shown with a warning icon if it has been marked as inactive after the template has been created. CT301000 - Customer contracts If a contract template with an inactive item is selected, a warning will inform that the inactive item has to be removed from the template. Existing contracts which are not completed and contain inactive items, will be processed as usual.	🔖	8.25 (20090 8)
Peppol BIS 3.0 gives an error when amounts are negative and quantity is not	In Peppol BIS 3.0 e-invoice sending, we have now included support for different scenarios when setting quantity, unit price and total amount on rows, so that the e-invoice format is valid. We now use the Manual amount and Quantity on the row to calculate the Unit price for the Peppol BIS 3.0 format.	🔖	F2020 05
As a customer I cannot start using the PEPPOL BIS 3.0 format for my electronic invoices until the Address Line 3 is supported	All address fields in the Peppol BIS 3.0 invoice document have now support for Address Line 3.	🔖	8.25 (20090 8)
Fixed the sorting for Customer specification (AR6 5200S)	The sorting on the report Customer specification sort by period and then ref. number has now been fixed.	🔖	9.30.0
Set InvoiceTypeCode for Overdue charge to 84	When sending overdue charge documents/invoices as e-invoice in Peppol BIS 3.0 format, we now set the InvoiceTypeCode to 84 (Debit note related to financial adjustments).	🔖	F2020 05

Information on sales order ID on Peppol BIS 3.0 invoices	When sending outgoing e-invoices in Peppol BIS 3.0 format, we have added support for adding the sales order number in the element OrderReference-SalesOrderID. The sales order number is set according to the following rules: 1. If rows in the invoice have no reference to the sales order number, the element OrderReference-SalesOrderID is not added. 2. If rows in the invoice contain one(1) sales order number, the element OrderReference-SalesOrderID is added and contains the sales order number. 3. If rows in the invoice have reference to several different sales order numbers, the element OrderReference-SalesOrderID is not added.	🔖	F2020 05
Use original invoice date on payment term	In the Customer ledger preferences (AR101000) window, there is a new field called "Use orig. invoice date on payment term". When it is selected, you will see a new field in the header of the Customer Invoice (SO303000) and Sales invoice (AR301000) windows called "Orig. invoice date". This field can be overridden and due date and cash discount date will be calculated from this date, and not the "Date" field.	🔖	8.24 (20062 3)
Send EAN code in PEPPOL BIS 3.0	In the Non-stock items and Stock item window on the Cross-reference tab, the Barcode Alternate ID on the item is now mapped to the invoice lines for outbound Peppol BIS 3.0 billing XML, with schemeID EAN(0160).	🔖	F2020 05
Send documents to Autoinvoice which are fully paid and in status "Closed"	It is now possible to send documents to AutoInvoice that are fully paid, with status "Closed". This is done from the "Print invoice" window (AR508000). When selecting actions "Send to AutoInvoice" or "Poll invoice status", you will see a new checkbox called "Show closed invoices/credit notes". When selected, only closed invoices/credit notes marked for sending to AutoInvoice that have not been sent, will be shown in the window.	🔖	F2020 05, Visma. Net ERP Kanba n week 24, Visma. Net ERP Week 24
Performance improvement for the Sales by item and customer window	Earlier, it took a long time before the Sales by item and customer (AR40103S) window displayed the results in the table. When there were many transactions (over 100,000), it could take more than 20 minutes. This has been resolved and now it takes less than 2 minutes for this amount of transactions (more than 10 times faster!).	🔖	8.96.0
New field "directDebitMandate" available when using the CustomerInvoice endpoint	A new field "directDebitMandate" is available when using the CustomerInvoice endpoints on the following operations: - GET /api/v1/customerinvoice/{invoiceNumber} - GET /api/v1/customerinvoice - PUT /api/v1/customerinvoice/{invoiceNumber} - POST /api/v2/customerinvoice	🔖	9.80.0
Add notes and files to sales invoices	In the previous version, you were not able to add notes and attachments for the documents in the Customer details (AR402000) window. This has now been fixed.	🔖	8.25 (20090 8)
The standard quantity for items on invoices and sales orders should be 1, not 0	Earlier, the standard quantity for items on invoices and sales orders was set to 0. This has been changed and the standard quantity is now set to 1.	🔖	9.05.0
ROT/RUT values is now put in XML file	Now the ROT/RUT information required for an invoice is put in the XML.	🔖	9.30.0
Fix for Open status of credit note created in migration mode	A credit note created in migration mode, with a zero balance, will no longer be in the Open status after validating customer balances.	〰️	9.68.0
Fix for opening a filter in a pivot table	Earlier, when you tried to open a filter in a pivot table, you received the error message 'Object reference not set to an instance of an object'. This has now been fixed and pivot table filtering works again as it should.	〰️	9.66.0
Validating customer balance from a scheduled task	Earlier, in the Validate customer balances (AR509900) window, when starting the validation from a scheduled task, you could experience that the routine never finished. This has now been fixed.	〰️	9.62.0
Performance of invoice/note printing process improved	The performance of the invoice/note printing process with a lot of invoice lines has now been improved.	〰️	9.67.0

Calculate commissions window opens correctly	For a reversed and closed sales invoice, with a commission and an applied payment, the Calculate commissions (AR505500) window no longer fails to open.	〰	9.55.0
Improved performance in the Release customer documents window	The performance in the Release customer documents (AR501000) window has been improved. The time to release all documents is ca. 6 % shorter.	〰	9.47.0
Prevent deleting customer refund from batch payments	It is no longer possible to delete customer refunds in the Customer payments (AR302000) window. You can still delete the customer refunds in the Batch payments (AP305000) window. This is to prevent the batch payment from connecting to a refund that is not there. The the total sum of the batch payment is also updated when the refund is deleted.	〰	9.27.0
Actions 'Upgrade contract' and 'Terminate contract' in the Customer contracts window now work as expected	Earlier, for some companies, customer contracts could not be upgraded or terminated in the Customer contracts (CT301000) window. This has now been fixed.	〰	9.38.0
Action "Send to AutoInvoice" and check box "Show closed invoices /credit notes" in the Send invoices window now work correctly retroactively	Earlier, when you created an invoice with Send to AutoInvoice selected, and used the "Reverse and apply to note" action, the invoice and credit note would not appear in the Send invoices (AR508000) window, after you selected Send to AutoInvoice and Show closed invoices/credit notes. This has now been fixed, so that you can send these documents to AutoInvoice.	〰	9.22.0
Improved performance in the Update contract prices and Customer contracts windows	Earlier, the Update contract prices (CT503000) and Customer contracts (CT3010PL) windows had slow performance. This has now been fixed and the performance has improved significantly.	〰	9.43.0
Disabled actions for Overdue charges in Customer ledger preferences	The actions "Reverse and apply to note", "Reverse" and "Correct invoice" have now been disabled in the Customer ledger preferences (AR301000) window when the document type is Overdue charges.	〰	9.20.0
Automation schedules with filter values on closed accounting periods not showing any records	In the Automation schedules (SM205020) window, if the schedule contained filter values on accounting periods that were closed in the system, the Filter values tab did not show any records. This has now been fixed.	〰	8.98.0
Support for correcting invoices in Sales invoices window	There is now a new way of correcting invoices, which requires less steps to update/correct an invoice than the previous standard reversal process. You can find the "Correct invoice" feature under the Actions drop-down list button in the Sales invoices (AR301000) window. When using the "Correct invoice" feature, the system will automatically create a copy of the original invoice that can be further edited. In the background, when releasing this new invoice, the system will automatically create a sales credit note for the original invoice and will match it against the chosen invoice to be corrected. As a note the original invoice will remain in status Open until the new corrected document will be finally released, but will no further be included in the payment process. Correcting of invoices with lines from the Shipments (SO302000) or Sales orders (SO301000) windows is currently not supported.	💲	8.73.0
"Know your customer" process for sending and receiving invoices against AutoInvoice after 01.07.2022 implemented	VnE now meets the needs of the "Know your customer" process so that you can continue sending and receiving invoices against AutoInvoice even after 01.07.2022	⚡	9.03.0
Generic performance improvement for Customer Invoice (SO30000) and Sales Invoices (AR301000)	Generic optimization of Customer invoice (SO303000) and Sales Invoices (AR301000). This will apply when creating new, updating existing, and processing involving any of these areas and open an existing document from both UI and API. Testing the creation of a new invoice with 100 lines, updating 10 lines and opening the invoice, showed an improvement of 42.3% for all collected operations.	⚡	8.25 (200908)
Multilingual support	Multi-language is now supported across the whole system. This functionality is set up via the System locales (SM200550) window using the Set up languages button. Define a default language and you can apply a localised description in multiple places in the system, like in Stock items and Non-stock items for example. These will again be used based on document language defined on customer/supplier.	⚡	8.26.0 (8.26.0 8.1036)

Customer/directdebit endpoint now shows all mandates with/without branch selected, branch field available in response	The following issues have been fixed for the GET operation for endpoint customer/directdebit: - the results are no longer missing the information regarding mandates without branch selected, - the branch field is now available in the response message.	🟧	9.83.0
Error message when releasing invoice with installment	Earlier, you were not able to release an invoice with an installment for a receivables account set up as Control Module is AR and without the Allow manual entry option set. This has now been fixed.	🟧	9.74.0
Create sales invoice from shipment with negative amount	Earlier, you could not create an invoice from a shipment with a negative amount. This has now been fixed.	🟧	9.69.0
Search for multiple words in random order in list window search line	When you use the column search line in a list window, you can now search for multiple partial or complete words in random order, by separating the words with a space. You will then get all results containing these words in any order. If you want to search for partial or complete words in a specific order, use "%" as a separator between the words. "%" also functions as a wildcard when you search on a specific order of words. Example: There are two customer names, "Big data customer" and "Customer Big Data". When you search on: - "big data cust" or "Big data customer", you will get both customer names in your result, - "big%cust", data%cust or "Big%customer", you will only get customer name "Big data customer" in your result, - "cust%big", "cust%data" or "customer%data", you will only get customer name "Customer Big Data" in your result.	🟧	9.67.0
Currency rate now works as expected when correcting invoice	Earlier, when you used the Correct invoice feature in the Sales invoices (AR301000) window, the system incorrectly changed the currency rate. This has now been fixed.	🟧	9.68.0
Factoring company and Assignment note are now included in invoice reports	Earlier, when you selected 'Factoring payment method' in the 'Bank account type' field in the Payment methods (CA204000) window, invoice reports would not display the Factoring settings. This has now been fixed for the following reports: -Invoice - Norwegian (AR64104S) -Invoice - Swedish (AR64118S) -Invoice - Swedish for Finland (AR64103S) -Invoice - Swedish left address (AR64108S) -Invoice - Dutch (AR64105S) -Invoice - Danish (AR64106S) -Invoice - Finnish (AR64102S) -Invoice - English (AR64101S)	🟧	9.68.0
Fixed error when releasing a customer payment in the Release customer documents window	Earlier, when you tried to release a customer payment in the Release customer documents (AR501000) window, you would receive an error message about a missing date and post period. This has now been fixed.	🟧	9.61.0
Discount calculation in the Sales invoices window	Earlier, in some scenarios, when freight cost was added to a shipment and discount was used, the discount was calculated twice in the Sales invoices (AR301000) window. This has now been fixed.	🟧	9.52.0
Delivery part works as expected in the Visma XML	Earlier, the delivery part did not work as expected in the Visma XML. This has now been fixed.	🟧	9.74.0
Improved performance in the Release customer documents window	Earlier, loading and releasing documents in the Release customer documents (AR501000) window took a long time. The performance has now been improved, and loading documents takes 99 % less time, and releasing documents takes 27 % less time than before.	🟧	9.52.0
Performance improved in Send direct debit invoices window	The performance of the Send direct debit invoices (AR50850S) window has been improved.	🟧	9.51.0
Improved performance in the Customer invoice window	Earlier, in the Customer invoice (SO303000) window, there was slow performance and it took 26 seconds to release an invoice. The performance has been improved by 58 %, and releasing an invoice now takes 11 seconds.	🟧	9.52.0
Overdue charge email attachment correctly generated	Earlier, when you emailed an Overdue charge from the Send invoices (AR508000) window, the attachment would not have the overdue charge lines. This has now been fixed.	🟧	9.54.0

Invoices sent to AutoInvoice correctly marked as 'Sent to AutoInvoice'	Earlier, in some circumstances, invoices that were sent to AutoInvoice did not have the 'Sent to AutoInvoice' check box selected in the Sales invoices (AR301000) window. This has now been fixed.	🟧	9.80.0
Automation schedule 'Poll invoicestatus from Autoinvoice' and date filter in the Send invoices window now work correctly	Earlier, the Automation schedule 'Poll invoicestatus from Autoinvoice' and the Start date and End date filter did not work in the Send invoices (AR508000) window. This has now been fixed.	🟧	9.43.0
Discount line for a customer showing in the Unreleased transactions (detailed) report	Earlier, when using a discount for a customer, the discount line was missing in the Unreleased transactions (detailed) (CA612500) report. This has now been fixed.	🟧	9.74.0
Error fixed in import scenario for sales invoices	Earlier, when you used import scenarios to create/update sales invoices, the system displayed the error "1 items have not been processed successfully. View name: Document". This has now been fixed.	🟧	9.82.0
Changing customer on invoice with manual amount now works correctly	Earlier, when you changed the customer of an invoice with a manual amount in the Sales invoices (AR301000) window, the Detail total was set to 0. This has now been fixed.	🟧	9.36.0
SchemeID under Accounting CustomerParty for country Estonia available in XML	The scheme ID of the Endpoint ID under AccountingCustomerParty in XML is no longer missing for the country of Estonia.	🟧	9.69.0
Poll invoice status in the Send invoices window now works correctly	The action Poll invoice status in the Send invoices (AR508000) window no longer fails to display invoices and update the AutoInvoice status.	🟧	9.34.0
Run contract invoicing window now works correctly	When you select a contract in the Run contract invoicing (CT501000) window, the columns Description, CustomerID, Expiration date and Contract template will no longer be incorrectly cleared.	🟧	9.44.0
Customer class information displayed correctly in the Send invoices window	The Customer class column in the Send invoices (AR508000) window is no longer missing customer class information.	🟧	9.37.0
A copy of a sales invoice with Send/Sent to AutoInvoice selected will now have Send/Sent to AutoInvoice cleared by default	Earlier, in the Sales invoices (AR301000) window, when you copied an invoice that had been sent to AutoInvoice, the check boxes 'Send to AutoInvoice' and 'Sent to AutoInvoice' were selected automatically in the new document. This has now been fixed.	🟧	9.26.0
Action "Send to AutoInvoice" and check box "Show closed invoices /credit notes" in the Send invoices window now work correctly retroactively	Earlier, when you created an invoice with Send to AutoInvoice selected, and used the "Reverse and apply to note" action, the invoice and credit note would not appear in the Send invoices (AR508000) window, after you selected Send to AutoInvoice and Show closed invoices/credit notes. This has now been fixed, so that you can send these documents to AutoInvoice.	🟧	9.23.0
Fixed validate customer balance process for confirmed shipment and credit limit	When you now run the validate customer balance processs, it will take into consideration the confirmed shipment order values in the Credit verification rules sections on the customer.	🟧	9.30.0
Using Tab in the Customers window now works correctly	Earlier, in the Customers (AR303000) window, moving from one field to another with the tab key did not work as it should. This has now been fixed.	🟧	9.87.0
Exporttype from customer location is taken into consideration for VAT category on the line	On the customer invoice (AR301000), the export type on the customer location is taken into consideration when you choose an item and a VAT category is set on the line.	🟧	9.30.0
PEPPOL schema IDs missing in Endpoint drop-down in some windows	Earlier, the PEPPOL schema ID was missing in the Endpoint drop-down list in the Customer locations (CR303010), Branches (CS102000), Organisations (CS101500), and Countries/counties/postcodes (CS20400S) windows. This has now been fixed.	🟧	9.26.0
Subaccounts not properly imported from Excel files in Sales invoices	Earlier, subaccounts were not properly imported from Excel files in the Sales invoices (AR301000) window. This has now been fixed.	🟧	9.37.0

Performance improvement for processing large datasets in the Run contract invoicing window	Running invoicing contracts for large datasets in the Run contract invoicing (CT501000) window no longer has a slow performance.	🔴	9.22.0
Action "Send to AutoInvoice" and check box "Show closed invoices /credit notes" in the Send invoices window now work correctly	Earlier, when you created an invoice with Send to AutoInvoice selected, and used the "Reverse and apply to note" action, the invoice and credit note would not appear in the Send invoices (AR508000) window, after you selected Send to AutoInvoice and Show closed invoices/credit notes. This has now been fixed, so that you can send these documents to AutoInvoice.	🔴	9.22.0
Sent to Autoinvoice functionality in the Reprint invoices window now working correctly	In the Reprint invoices (AR50801S) window, the Process and Process all buttons no longer fail to open the PDF files for documents that were sent to AutoInvoice.	🔴	9.29.0
VAT taxable total set incorrectly for invoice	Previously, the VAT taxable total was set incorrectly because of rounding in specific scenarios where the invoice contained a group discount and the invoice was created from a sales order/shipment. This has now been fixed.	🔴	9.11.0
Verify KYC button disabled	Earlier, in some situations, the Verify KYC button was disabled when the AutoInvoice activation status was Activated and the KYC verification status was Unverified. This has now been fixed.	🔴	9.05.0
One VAT category code generated in the Sales invoices window XML draft	Earlier, when you generated an XML draft in the Sales invoices (AR301000) window, the system would generate multiple VAT category codes in the XML file: AllowanceCharge and TaxTotal-TaxSubTotal. This has now been fixed and only one VAT category code is generated.	🔴	9.49.0
Fill in LineCntr error in Send invoices window	After the release of the 9.01 version, you got the Fill in LineCntr error message in the Send invoices (AR508000) window when sending invoices to AutoInvoice. This has now been fixed.	🔴	9.04.0
VAT for freight amount incorrect and freight details editable after release of invoice	Previously, the VAT for freight amount was not set correctly in an invoice when the Ship via code and freight amount were added in the shipment. In addition, it was possible to change the Freight details on the invoice in the Customer invoice (SO303000) window after the invoice had been released. This has now been fixed.	🔴	9.01.0
Wrong document opens when you click on a ref. no. in the Process customer refunds window	Earlier, when you clicked on a reference number in the Process customer refunds (AR50300S) window, the wrong document opened. This has now been fixed.	🔴	9.01.0
The Process customer refunds window does not adjust the IBAN based on the payment method	Earlier, the Process customer refunds (AR50300S) window did not adjust the IBAN based on the selected payment method. This has now been fixed.	🔴	9.01.0
Correct account when adding item in customer invoice	Earlier, in some scenarios, when you added an item in the Customer invoice (SO303000) window, the account on the line was incorrect. This has now been fixed, and the account is correctly collected according to the customer location's export type.	🔴	9.53.0
Metadata not included in AutoInvoice sending - B2C invoices sent by email or print	Earlier, B2C invoices were sent by email or print when AutoInvoice was used as a distributor. This has now been fixed.	🔴	8.96.0
Invoices to AutoInvoice get wrong route due to missing operator information for non-Finnish companies	Earlier, in some circumstances invoices to AutoInvoice got incorrectly routed because operator information was missing in metadata (applied to invoices sent in PEPPOL format). This has now been fixed.	🔴	8.98.0
Not possible to see the AutoInvoice sending method in the Sales invoices window	Earlier, it was not possible to see if an invoice will be sent as a banking e-invoice (Consumer) or as as a regular e-invoice (Standard) in the Sales invoices (AR301000) window. This has now been fixed.	🔴	8.96.0
Not possible to add or edit an activity, or open the Non-stock items window.	Earlier, you were not able to add or edit an activity in the Customers (AR303000), Suppliers (AP303000) and Projects (PM301000) windows. Also, the Non-stock items (IN202000) window did not open correctly when clicking the link in the Item ID field in the Purchase orders (PO301000) and Sales orders (SO301000) windows. These have now been fixed.	🔴	8.88.0

Barcode now includes payment reference number when saving a sales invoice	Earlier, when you created a sales invoice in the Sales invoices (AR301000) window, the payment reference number was not created until you saved the invoice. This has now been fixed.	🔲	9.29.0
Error message when printing statement in the Customer statement history (AR404600) window	Earlier, when clicking the "Print statement" button in the Customer statement history (AR404600) window, an error message occurred. This has now been fixed.	🔲	8.87.0
Metadata file not created for Peppol sending when there's no e-invoice address specified for the customer	Earlier, the metadata file was not created for Peppol sending when there was no e-invoice address specified for the customer. This has now been fixed.	🔲	8.89.0
Mandatory fields in e-invoice XML now work as expected when working with salespersons	Earlier, when working with salespersons, some mandatory fields in the e-invoice XML could not be populated. This has now been fixed.	🔲	9.68.0
Invoices from sales orders get lower discountable amount and discount	Earlier, invoices from sales orders (SO301000) got a lower "discountable amount" (and discount) in some situations. This has now been fixed.	🔲	8.79.0
Payment means code for e-invoices for Dutch suppliers not set correctly	Earlier, for suppliers in the Netherlands, the payment means code in the PEPPOL document (invoices) sent to AutoInvoice was set incorrectly. This has now been fixed.	🔲	8.77.0
Send B2C invoices to AutoInvoice without email address and phone number	Earlier, it was not possible to send B2C invoices to AutoInvoice without an email address and a phone number. This has now been fixed.	🔲	8.80.0
Printing invoices that are sent to AutoInvoice	Earlier, it was not possible to print an invoice if it was sent to AutoInvoice. It is now possible in the Reprint invoices (AR50801S) window with the new Sent to AutoInvoice option. It also makes the sent invoices visible.	🔲	8.95.0
Autoinvoice settings updated for B2C activation service	The outdated AutoInvoice settings for the B2C service activation have now been removed from the AutoInvoice settings (CS10250S) window.	🔲	8.80.0
The setting "Use the first AutoInvoice attachment to view invoice" for PEPPOL invoices is not inherited from customer class 1 to new customers	Earlier, the PEPPOL invoices setting "Use the first AutoInvoice attachment to view invoice" was not inherited from customer class 1 to new customers. This has now been fixed.	🔲	8.91.0
Delivery location not picked from customer location for invoices sent in PEPPOL format	Earlier, when an invoice was created without a connected order and shipment and sent in PEPPOL BIS 3.0 format, in the e-invoice file the delivery address was set to the same as the invoice address. This has now been fixed so that the delivey address is picked from the customer location selected on the invoice.	🔲	8.77.0
Error in validation of email address, banking e-invoice (Norway)	Earlier, in the Customers window (AR303000) on the Invoicing settings tab there was an error in validation of email addresses that contained underscores and "Send invoices as banking e-invoice (Norway)" was selected. This has now been fixed.	🔲	8.75.0
Error sending credit notes to AutoInvoice in PEPPOL format	Earlier, in version 8.72, there was an error when sending credit notes to AutoInvoice in PEPPOL format. This has now been fixed.	🔲	8.73.0
Unable to select inactive financial periods in "From /To financial periods" in Sales invoices - overview	Earlier, it was not possible to select inactive financial periods in "From/To financial periods" fields in the Sales invoices - overview window (AR40104S). This has now been fixed.	🔲	8.73.0
Prevent currency rates in minus	It is now prevented to have a minus currency rate in windows that have the possibility to override currency rate, such as Sales invoices (AR301000), AP10172, Bank transactions (CA304000) and Journal transactions (GL301000). This is to avoid errors caused by minus rates.	🔲	9.27.0
Invoice lines from Customer contracts window got wrong sales account in sales to EU customers	Earlier, invoices generated from the Customer contracts (CT301000) window got a wrong sales account on invoice lines on sales to customers within EU. This has now been fixed.	🔲	8.75.0

Error "Please release the inventory issue "xx" before releasing Invoice"	Earlier, releasing an invoice caused an error if there was a stock item with zero quantity in a kit. This has now been fixed.	🔲	8.89.0
Send attachment as commercial invoice to Visma.net Autoinvoice	Earlier, there was no option in the PEPPOL format to send an attachment as a commercial invoice as a basis to Autoinvoice with option "Exclude Invoice PDF" enabled. This has now been fixed, and an additional option "Use the first AutoInvoice-attachment to view invoice" has been added, enabling the first attachment marked to be sent to AutoInvoice will be the visible invoice for the receiver. This only applies if an attachment exist on the invoice, else the pure XML will be used to generate a readable version of the invoice for the receiver.	🔲	8.70.0
Wrong price selected on a customer's sales invoices in UI, API, and error in integration to Severa	Earlier, in some circumstances the wrong price was selected on the customer's sales invoice in the UI and API, and in addition, this caused an error in the integration to Severa. This has now been fixed.	🔲	8.82.0
Improved performance in the Send direct debit invoices window	The performance in the Send direct debit invoices (AR50850S) window has been improved. The time to complete the Process all action is ca. 24 % shorter, and the time it takes to navigate to the next page in the table is ca. 6 % shorter.	🔲	9.47.0
Currency conversion when changing currency	Earlier, when you changed the currency on a line in a sales price worksheet and used Calculate pending prices, the currency conversion did not work properly. This has now been fixed.	🔲	9.75.0
Missing financial information in invoices sent to AutoInvoice for Danish companies (PEPPOL)	Earlier, there was financial information missing from the Organisations (CS101500) window, tab Payment settings in the invoices sent to AutoInvoice in PEPPOL format for companies in Denmark. This has now been fixed.	🔲	8.73.0
Not possible to exclude invoice PDF when using PEPPOL BIS Invoice for B2C	Previously, it was not possible to exclude the invoice PDF for consumer route when using PEPPOL BIS invoice (Norway). This has now been fixed, leaving the option to exclude invoice PDF on B2C, in addition to for B2B, for both the Customers (AR30300) and Customer classes (AR20100) windows.	🔲	8.67.0
Attachment tagged as "CommercialInvoice" when sending to AutoInvoice	Earlier, when sending sales invoices (AR301000) to AutoInvoice in PEPPOL format, the attachments got tagged as "CommercialInvoice" instead of "Attachment" when invoice PDF is excluded. This has now been fixed.	🔲	8.63.0
Usability improvements in Exclude invoice pdf property for Customer and Customer class	There is a minor adjustment in the Customers (AR303000) and Customer classes (AR201000) windows regarding the setting "Exclude invoice PDF" for improved usability. The setting is now attached to "Send invoices to AutoInvoice", and the setting will be read only if "Send invoices to AutoInvoice" is unchecked, to clearly show that these two settings are connected.	🔲	8.62.0
New limit 1500 for copy /paste lines for all document types	Earlier, the limit of lines was set to 1000 lines for copy/paste documents. The new limit is set to 1500 lines.	🔲	8.64.0
PEPPOL schema IDs missing in Endpoint drop-down in some windows	Earlier, the PEPPOL schema ID was missing in the Endpoint drop-down list in the Customer locations (CR303010), Branches (CS102000), Organisations (CS101500), and Countries/counties/postcodes (CS20400S) windows. This has now been fixed.	🔲	8.72.0
Element for discount set incorrectly in PEPPOL BIS 3.0	Earlier, the AllowanceCharge element in PEPPOL BIS 3.0, which shows the discount amount of the invoice, was set incorrectly in certain scenarios resulting in invoice ending up in error state when validated. This has now been fixed.	🔲	8.67.0
Print option does not have any effect when PEPPOL invoice is enabled	The option "Print" under "Send Invoices to AutoInvoice" in the Customers (AR303000) and Customer classes (AR201000) windows is now hidden when PEPPOL invoice is enabled in the Customer ledger preferences (AR101000) window. The background for this change is that the option was never meant to have any effect when PEPPOL invoice is enabled, and this change makes this clearer for the users of the system.	🔲	8.61.0
Inactive periods not selectable in Sales by item and customer report	Earlier, inactive periods were not selectable in the Sales by item and customer (AR40103S) report. This has now been fixed.	🔲	8.69.0
Document text for VAT code not set correctly in PEPPOL format	Earlier, in some circumstances, document text for VAT code was not set correctly in the PEPPOL format for invoices sent to AutoInvoice. This has now been fixed.	🔲	8.75.0
Payment terms sent to AutoInvoice in PEPPOL format not changing with payment terms on invoice	Earlier, the payment terms sent to AutoInvoice (in the PEPPOL format) didn´t change if you changed the payment terms on the invoice. This has now been fixed.	🔲	8.72.0

Missing link to batch for released documents	Earlier, in some situations, invoices already released and having a general ledger batch created in the Voucher list (GL40600S) window remained stuck in the Balanced status with no link to the general ledger batch in the Sales invoices (AR301000) window. This has now been fixed and the solution is currently deployed under a feature toggle.	🔲	8.89.0
PDF attachments in wrong language on invoices sent to AutoInvoice	Earlier, in some scenarios, the wrong language was used on the generated PDF attachment on outbound electronic invoices in the PEPPOL BIS 3.0 format. This has now been fixed.	🔲	8.56.0
Error in sending invoices marked for sending to AutoInvoice in Print invoice window	Earlier, when more than one invoice was marked for sending to AutoInvoice in the Print invoice window (AR508000), you got an error message and no invoices were sent to AutoInvoice. This has now been fixed.	🔲	8.51.0
Wrong dunning letter fee for Norway in template	Earlier, the maximum dunning letter fee set as default in the Customer ledger preferences (AR101000) was too high. It has now been corrected to meet the rates set by the government.	🔲	8.53.0
Overdue documents missing in Prepare dunning letters when dunning process is set to "By customer"	Earlier, overdue documents were missing in some cases in the Prepare dunning letters (AR521000) window when "Dunning process" was set to "By customer" in the Customer ledger preferences (AR101000) window on Dunning settings tab.	🔲	8.67.0
The "Sales by item and customer" inquiry shows the wrong customer	Earlier, the "Sales by item and customer" inquiry showed the wrong customer in some circumstances. This has now been fixed.	🔲	Main
Wrong currency rate used in Customer invoice window with Add order functionality	Earlier, a wrong currency rate was used in the Customer invoice (SO303000) window, when using the Add order functionality and option "Use shipment date for invoice date". This has now been fixed.	🔲	8.69.0
Wrong invoice/credit note is sent to AutoInvoice	Earlier, in some circumstances, a wrong invoice/credit note was sent to AutoInvoice. This has now been fixed.	🔲	8.51.0
New RUT types for Sweden only applicable from 15. April 2021	Previously, the new tax relief service work types (RUT) for Furniture, Supervision Of Housing, Transport To Sales, and Laundry could only be applied on sales documents with a date of 15. April 2021 or later. This has now been adjusted so that new RUT types are applicable from 1. January 2021.	🔲	8.46.0
Adding note for customer location lead to all locations being affected	Earlier when adding note on one customer location (AR303000) could lead to note being added to all locations for this customer. This has now been fixed.	🔲	8.58.0
Error when printing a report twice after using the back button in the browser	Earlier, when you printed documents using the print function under the Reports menu from any window in the system, you could get an error-message if you clicked the back button in your browser and tried to re-print the same document. This has now been fixed.	🔲	8.45.0
Peppol BIS 3.0: Validation error when unit code is missing on the invoice line	Earlier, when item ID was missing on the invoice line (AR301000) and a unit of measure was added, you got a validation error when sending e-invoices in Peppol BIS 3.0 format. This has now been fixed, so that the unit code for the line is set according to the unit of measure, and you will not get the validation error anymore.	🔲	8.50.0
Error when trying to send a Peppol invoice with empty fields for corporate ID and VAT registration ID	Earlier, when the corporate ID and the VAT registration ID were missing in a Finnish company, you got an error message when trying to send the invoice to AutoInvoice in Peppol format. This has now been fixed.	🔲	8.45.0
Incorrect rounding for VAT taxable amount	Earlier, in specific scenarios where you had invoices with discount, the rounding for the VAT taxable amount was incorrect. This could be seen when you summed up the invoice amounts, which also resulted in a validation error when sending the invoice as an e-invoice in the Peppol format. This has now been fixed, so that the total amount is calculated after the discount, for rows with more decimal precision. This means that the VAT taxable will get the correct rounding and decimal amount.	🔲	8.48.0
Hyphen [-] removed from postal code fields in Sales orders, Sales invoices, Customer invoices, and Shipments	Earlier, hyphen [-] was removed from postal code fields in the Sales orders (SO301000), Customer invoices (SO303000), Sales invoices (AR301000,) and Shipments (SO302000) windows. This has now been fixed.	🔲	8.55.0

Peppol BIS 3.0: The value for scheme ID 0190 is taken from the wrong field	Earlier, when using scheme ID 0190 (Dutch OIN number), the value was taken from the Corporate ID field, which was wrong. This has now been fixed, so when you send an e-invoice (AR301000) in Peppol BIS 3.0 format using scheme ID 0190, the value is taken from the GLN field, and the invoice will now contain correct information.	🔲	8.50.0
Change of customer ID in sales invoice can lead to errors in VAT handling	Earlier, when you changed the customer ID in a sales invoice (SO303000), it could lead to errors in VAT handling. This has now been fixed.	🔲	8.55.0
Wrong format of the VAT number for Finnish companies when sending e-invoices in Peppol format	When sending e-invoices in Peppol format, there was an issue with wrong format of the VAT number for Finnish companies. This has now been fixed, so that VAT numbers in domestic format are set in the international format, in order to fulfill the requirements of Peppol.	🔲	8.43.0
Improved transaction handling for sales and customer invoice	Improved the transaction handling for release of customer and sales invoices. This will remove the possibility for partial commitment of data in the system, which leads to better data integrity.	🔲	8.52.0
Internal ID for branch showed up in payment reference instead of the CD	When included reference to branch in the CID for a company with multi-branch support in the payment settings of Customer Ledger Preferences (AR101000). The generated Payment Reference Nbr in Sales Invoice screen (AR301000) contained the internal id for branch instead of the CD (visible ID). This has now been fixed.	🔲	8.58.0
'Undo last action' fails after having set up and activated contract where customer invoice is generated	Earlier, 'Undo last action' (CT301000) failed after having set up and activated the contract where the customer invoice was generated. This has now been fixed.	🔲	8.56.0
Incorrect calculation of the total amount when having negative discount applied on the invoice	Earlier, the total amount was not calculated correctly when invoices contained a negative discount. This has now been fixed.	🔲	8.41.0
Unable to create or edit contacts and locations in the Customers window if you have the Financials Invoice User role	Earlier, if you had the Financials Invoice User role, it was not possible to create or edit contacts and locations in the Customers window (AR303000). This has now been fixed.	🔲	8.40.0
Drill down for customer invoices not working from Sales invoices - overview and Sales by item and customer	Earlier, when you drilled down for customer invoices in status Balanced or On hold from the inquiry windows Sales invoices - overview and Sales by item and customer, you did not get any result. This has now been fixed.	🔲	8.37.0
Error in Sales by item and customer window with periods with different years	Earlier, there was a bug in the Sales by item and customer window (AR40103S), in case "From period" and "To period" selections had a different year. This has now been fixed.	🔲	8.75.0
Support for "Godkänd för F-skatt" when sending e-invoices in the Peppol BIS 3.0 format	For Swedish companies, it is mandatory to include the text "Godkänd för F-skatt" in an invoice, when the company is registered for corporate tax. This is now supported when sending e-invoices in the Peppol BIS 3.0 format.	🔲	8.39.0
Only cross-references with barcode type in StandardItemIdentification field on Peppol BIS 3.0 invoices.	Earlier, when sending an invoice in the Peppol BIS 3.0 format, the field StandardItemIdentification in the invoice line was set incorrectly. All cross-reference types were included in the field, not only barcode. This has now been fixed so that only cross-references with the type barcode are added to the StandardItemIdentification field. Priority for selecting a barcode is the following: 1. The system checks if there is a barcode with a specified unit of measure and if it is the same as the unit of measure on the invoice line 2. The system checks if there is a barcode without a specified unit of measure 3. If several barcodes are found, the system picks the first one	🔲	8.51.0
An error has occurred while processing your request on Customer profiles report	Earlier you would get "An error has occurred while processing your request." when opening Customer profiles report (AR651000). This has now been fixed.	🔲	8.58.0

PDF invoice contains data from another company	Earlier, if you had multiple companies, there was an issue when you exported an invoice to PDF. The print preview was fine, but after exporting it to PDF, it contained data from another company. This has now been fixed, so that the PDF invoices contain the correct data.	🔲	8.44.0
The hyphen character is removed from the postcode field in the Customers window	Earlier, the hyphen character (-) was removed from the postcode field in the Customers window (AR303000). This has now been fixed so that hyphen is not removed from the postcode field anymore.	🔲	8.40.0
The overdue charge process stops when the fee amount is set but the Description field is empty	Earlier, when the fee amount was set but the Description field was empty in the Overdue charges (AR204500) window, the overdue charge process stopped. This has now been fixed.	🔲	8.38.0
Lines are missing after export to Excel	Earlier, when you exported to Excel from an invoice layout, there were lines missing in the output. This has now been fixed.	🔲	8.47.0
Attachments not included when sending PEPPOL invoices to AutoInvoice	Earlier, in some cases, the invoice attachments were not included in the document when sending to AutoInvoice in PEPPOL format. This has now been fixed.	🔲	8.34.0
Missing "unitCode" in invoices sent to AutoInvoice in PEPPOL-format	Earlier, in some cases, the "unitCode" was missing in invoices sent to AutoInvoice in PEPPOL format. This has now been fixed.	🔲	8.33.0
Wrong calculation of the discount when basing the sales invoice on several sales orders	There was an issue with wrong calculation of the discount when you based the sales invoice on several sales orders. This has now been fixed, so that the recalculation of the total discount amount will be correct when updating the amount on the invoice.	🔲	8.40.0
The column Active available in Deferral codes window (DR2020PL)	The generic inquiry for deferral codes (DR2020PL) has been modified and the column Active is now available in the window.	🔲	8.29.3
PEPPOL BIS 3.0 - validation error: Document MUST not contain empty elements	Earlier, when sending invoices with PEPPOL BIS 3.0 format, an error occured if the <cbc:ID> under the <cac: OrderReference> was empty: "Error SEND ERROR (REASON: Sending to PEPPOL failed: XML Invalid | [PEPPOL-EN16931-R008]-Document MUST not contain empty elements.)" This has now been fixed.	🔲	8.30.0
Attachments not sent to AutoInvoice	Earlier, when the setting "Automatically mark file attachments to be sent to Autoinvoice" in the AutoInvoice settings window was enabled, there was an issue with missing invoice attachments when sending to AutoInvoice. This has now been fixed.	🔲	8.29.3
Peppol BIS 3.0 - Remove schemeID in PartyIdentification and PartyLegalEntity when scheme 0037 is used	In PEPPOL BIS 3.0, there was an error in schemeIDs for the Finnish scheme ID 0037 in the PartyIdentification and PartyLegalEntity elements, under the AccountingCustomerParty and AccountingSupplierParty. SchemeID 0037 should only be used with the EndpointID (where you have the OVT electronic address), not with the business ID. This has now been fixed.	🔲	8.29.0
Send to AutoInvoice is not enabled for the Debit note type in the Sales invoices window	Earlier, if the "Send to AutoInvoice" check box was enabled on the customer, the "Send to AutoInvoice" check box on the Invoice address tab in the Sales invoices window was not enabled, when using the "Debit note" type. This has now been fixed.	🔲	8.29.0
Do not fill out cash discount metadata when the invoice has no cash discount terms	Earlier, when an invoice had a credit term that did not contain a cash discount, the corresponding cash discount fields were filled out when sending to AutoInvoice. This is now fixed, so that the fields are empty when cash discount is not present on invoice.	🔲	8.27.0
Amount error when processing the claim for a ROT/RUT document	Earlier, when you created a payment for a ROT/RUT invoice, voided the payment and created a new payment, you got an error when processing the claim in the "Claim Domestic services deduction" window: "The amounts are incorrect for some documents". This has now been fixed.	🔲	8.27.0
The Attachments tab is not updated correctly when Send to AutoInvoice is enabled	Earlier, the "Attachments" tab was not updated correctly when "Send to AutoInvoice" was enabled. This has now been fixed.	🔲	Future Versions

Mapping factoring assignment note from payment method to PEPPOL BIS 3.0 XML document	Earlier, when using factoring, the "Assignment note" text from the payment method was not included in the PEPPOL BIS 3.0 XML document as a note. This has now been fixed.	■	8.72.0
Inventory transaction created but not released	Earlier, when you released an invoice for a shipment, where more items were delivered than you had in stock, and negative stock was allowed for the items, the system gave an error. The invoice was released but the inventory transaction was not released. This has now been fixed.	■	8.25.3 (8.25.4 9.1020)
Missing attachments in AutoInvoice	Earlier, there was an issue where the attachment added to an invoice for AutoInvoice did not get the 'Send file to AutoInvoice' checkmark, and was not sent to AutoInvoice. This has now been fixed.	■	8.25.3 (8.25.4 9.1020)
Document discount not set on the sales invoice	Earlier, when a document discount was added manually to the sales order, and the invoice was created based on that sales order, the discount line from the Discount tab was not included. This has now been fixed.	■	8.26.0 (8.26.0 8.1036)
Wrong invoice image was attached to the invoice when sending to AutoInvoice	Earlier, there was an issue where the wrong invoice image was attached to the invoice when sending to AutoInvoice. This has now been fixed.	■	8.26.0 (8.26.0 8.1036)
The 'Send to AutoInvoice' option is deactivated from the sales invoice	Earlier, when a customer had the 'Send to AutoInvoice' option activated as default and you created a customer invoice from a sales order or a shipment, or a sales invoice was created and the location was changed, the 'Send to AutoInvoice' option was deactivated. This has now been fixed.	■	8.25.1 (8.25.4 9.1015)
Clicking the invoice reference number results in a popup window with an empty invoice	When clicking the invoice reference number from several screens, the popup window that should display the invoice was showing a new, blank invoice instead. This has now been fixed, so that the popup window displays the invoice that you have clicked on.	■	8.36.0
Dunning letters contains dunning letters already sent to customer and with incorrect email subject	Earlier, when using the action "Email dunning letter" in the Print/release dunning letters window (AR522000), the generated email could in some cases contain old dunning letters and also using the wrong subject for the email. This has now been fixed.	■	8.27.0
The invoice does not validate when the sender is a non-taxable organisation	Earlier, when sending e-invoice in Peppol BIS 3.0 format, the invoice did not validate when the sender was a non-taxable organisation. This has now been fixed. When an invoice is sent from a non-taxable organisation, the VAT registration information is now set correctly.	■	8.26.0 (8.26.0 8.1036)
Wrong delivery address in PEPPOL BIS 3.0 document	Earlier, you could in some scenarios end up with the wrong delivery address in the Peppol BIS 3.0 document. This has now been fixed, and the Peppol BIS 3.0 documents will always have the correct delivery address.	■	8.25 (20090 8)
Invoices that were sent to AutoInvoice are now displayed in the Send invoices window	Earlier, after you sent an invoice to AutoInvoice in the Sales invoices (AR301000) window, the invoice would not be displayed in the Send invoices (AR508000) window, after you selected Print invoice/note and Show all. This has now been fixed.	■	9.24.0
Wrong report connected to customer class for dunning letter in Dutch template	Before now, a wrong report (AR64201S) was connected to the customer classes for dunning letters in the Dutch template. Now, this has been fixed and the wrong report was replaced with the report AR66101S.	■	8.25 (20090 8)
Not possible to import from Excel with different values for Break quantity	Earlier, in the Sales price worksheets (AR202010) window, it was not possible to import from Excel when different Break quantity values were set for the same item. This has now been fixed.	■	8.90.0
Missing attachments when sending invoices to AutoInvoice	Earlier, in certain scenarios, attachments in invoices were not included when sending the invoice as an e-invoice to AutoInvoice. This has now been fixed.	■	8.26.0 (8.26.0 8.1036)

Due date is not set correctly on the invoice when using a credit term with installments	Earlier, when you used a credit term with multiple installments, the due date for the created invoices were not set correctly. This has now been fixed.	🔲	8.26.0 (8.26.0 8.1036)
Salesperson not set by new customer class	Earlier, when changing customer class in the Customers (AR303000) window, the salesperson was not set according to the settings of the new customer class. This has now been fixed.	🔲	8.67.0
Regretting changing the customer class on a customer results in changed settings	Earlier, when changing the customer class on a customer and you answered "No" in the confirmation dialog box to regret the change, the change was done anyway. This has now been fixed.	🔲	8.41.0
Discount disappears when changing the invoice date	In the previous version, when you created a sales invoice with a discount and you changed the date of the invoice, the discount was set to zero even though the discount should still have been applicable to the invoice. This has now been fixed.	🔲	8.25 (20090 8)
The bank account is not set in the Process customer refunds (AR50300S) window if another location than the default is used	Earlier, when a customer had several locations and added a bank account, while having a payment document to be processed, the bank account was not set when processing the payment document in the Process customer refunds (AR50300S) window. This happened if another location than the default one was selected on the customer for the payment document. This has now been fixed.	🔲	8.26.0 (8.26.0 8.1036)
Skipped discounts on Sales orders (SO301000) should not to be a part of Customer invoice (SO303000) or Sales invoices (AR301000)	Earlier, when a document discount was added to a sales order and the discount was marked as skipped, the invoice created for the sales order did not have the "Skip discount" checkbox selected. As a result the discount was included in the invoice reports. This has now been fixed. When a sales order contains a skipped discount, it will not be transferred to the invoice.	🔲	8.24 (20062 3)
Customer access is not filtering correctly in report windows	Earlier, Customer access settings were not filtered correctly in reports. This has now been fixed and we have implemented Customer Access filtering support for the following reports: - Sales profitability by salesperson and customer (AR673000) - Sales profitability by customer and order (AR672000) - Sales profitability by item and order (AR671000) - Sales profitability by item class and item (AR674000) - Sales profitability by customer class and customer (AR675000)	🔲	8.25 (20090 8)
Link error when clicking customer number in Customer history summary report	Earlier, there was a link error when you clicked the customer number in the Customer history summary report (AR652100) window. This has now been fixed.	🔲	8.67.0
Validation of PEPPOL BIS fails if freight is automatically included on a Customer invoice	Earlier, the freight lines in PEPPOL BIS 3.0 electronic invoices did not validate. This has now been fixed.	🔲	8.23 (20060 9)
Cost is set incorrectly after releasing a credit note	The cost set for an invoice row, including a non-stock item with standard cost, was doubled when the credit note was released. This has now been fixed and the cost is set correctly according to the standard cost of the item.	🔲	8.23 (20060 9)
Incorrect delivery address in PEPPOL file	When an invoice was created and sent as e-invoice in PEPPOL BIS 3.0 format, the delivery address was set incorrectly. This happened when the shipment for the invoice was created from a drop-ship order, and a shipment with same shipment number existed from before. This has now been fixed.	🔲	F2020 05
The role "Light user" cannot access the windows Supplier locations and Customer locations	The role "Light user" have now gotten read-only access for Supplier locations (AP3030P1) and Customer locations (CR303010).	🔲	F2020 05
Incorrect document discount set for e-invoices in Peppol BIS 3.0 format	Earlier, when a purchase invoice containing a document discount and a sales invoice not containing any discount had the same invoice number and the sales invoice was sent as an e-invoice in the Peppol BIS 3. format, there was incorrectly set a document discount in the created xml-file. This has now been fixed.	🔲	8.25 (20090 8)
Leading spaces not allowed in invoice numbers	Earlier, when setting the invoice number manually, is was possible to enter the number with a leading space. This later on gave an error when trying to match the invoice to a credit note or payment. This has now been fixed.	🔲	8.34.0

Customer number for PartyIdentification in PEPPOL BIS 3.0 sending	Earlier, Customer ID was not included in field AccountingCustomerParty-Party-PartyIdentification-ID when sending e-invoices in the PEPPOL BIS 3.0 format. This caused problems when you wanted to send the invoice to a B2C receiver. This has now been fixed so that Customer ID is used as a fallback value, if no value (for example, Corporate ID) can be found based on the selected scheme ID.	🔲	8.64.0
Discount is printed on invoice reports even if the "Skip discount" checkbox is selected on the Sales invoice	Earlier, when an invoice contained a document or a group discount, where the "Skip discount" checkbox was selected, the amounts were set correctly but the discount was still printed on the invoice reports. This has now been fixed.	🔲	8.25 (20090 8)
Sales reports not including invoice lines without item number	Earlier, sales reports did not include invoice lines without item number. This has now been fixed.	🔲	8.69.0
Some invoices not processed when sending a batch to AutoInvoice	Earlier, when a big amount of invoices where processed in the Print invoice (AR508000) window - Send to AutoInvoice, some of the invoices got errors in some cases and were not processed and sent to AutoInvoice. This has now been improved, so that the failing invoices are reprocessed in the same batch sending.	🔲	F2020 05
As a user of Visma.net ERP I am expecting my invoice reports to follow the number and date format of my customer, to better support international trading and avoid issues with scanning services in the recipient country.	The invoice reports will now follow the setup of the customers document language, which means that the number and date format will support international trading in a better way, and we will also avoid issues with scanning services in the recipient country.	🔲	8.25 (20090 8)
The hyphen character is not allowed in the postcode field	Earlier it was not allowed to have a hyphen character (-) in postcodes, for example in the address of a customer. This has now been fixed.	🔲	8.27.0
Cost and margins show incorrect values in sales order when using certain settings in Sales orders preferences	Earlier, if you in Sales orders preferences (SO101000) had selected 'Non-stock kit standard cost' for the 'Cost calculation basis for non-stock kits', this also affected the cost for items that were not marked as Kit. This made the cost and margins show incorrect values. This is now fixed, and both costs and margins are now shown correctly. We have also resolved a problem with calculating the cost when using the valuation methods FIFO or Specific.	🔲	8.26.0 (8.26.0 8.1036)
Not possible to make a ROT /RUT claim if the invoice period is closed	Earlier, it was not possible to make a ROT/RUT claim if the invoice period was closed. This has now been fixed.	🔲	8.48.0
Set export type on customer location to select sales account	In the Customer classes (AR201000) window, you can select an export type, which determines which sales account (Domestic, Domestic exempt VAT, EU, Export) is selected in sales documents. Now the Export type field has been added to the Customer locations (CR303010) window so that you can choose to have the sales account selected based on the customer location specific export type. This way you can have a different sales account set, for example, in situations where the customer locations are in different countries. When the system selects the sales account, the system first checks the export type on the customer location. If export type is not set in the customer location, it will work as previously, meaning that the export type is checked from the customer class.	🔲	8.66.0
Sales invoices - overview not showing the correct status for Emailed property	Earlier, the Sales invoices - overview (AR40104S) did not show the correct status for the "Emailed" property. This has now been fixed.	🔲	8.66.0
Discount line is missing on Sales invoice	Earlier, if you released a Customer invoice (SO303000) that had multiple discount lines with the same discount code, only the first discount code line was included in the Sales invoices (AR301000) screen. This has now been fixed. We have also added new columns on the Discount details tab in the Sales invoices screen, where you can see the connected Sales order and Sales Order Type for each discount line.	🔲	8.23 (20060 9)
The 'Send invoices to AutoInvoice' option in the Customers window cannot not be changed, when the default base currency is overridden.	Earlier, when the default base currency was overridden in a company, the 'Send invoices to AutoInvoice' option in the Customers window (AR303000) could not be changed. This has now been fixed.	🔲	8.26.0 (8.26.0 8.1036)

The search list for customer locations in the Customer locations window also gives a list of suppliers	Earlier, when using the Business connection field in the Customer locations window (CR303010) to search for customer locations, it also listed suppliers. This is now fixed so that only customers appear in the search list.	🔴	8.40.0
Payment date is missing in the inquiry Sales invoices - overview	Earlier, the inquiry Sales invoice - overview (AR40104S) did not show the Payment date. This has now been fixed.	🔴	8.28.0
Printing Invoice report from AR304000 works incorrectly	Earlier, when creating a Cash sales (AR304000) and in the window selecting Reports - Invoice/note, the report also contains other invoice document reports. This has now been fixed and when printing the cash sales, the report only contains that specific cash sales.	🔴	F2020 05

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Data as a Service

Release Notes.	Documentation	T	Ret versi
Purchase order receipt number not exposed on inventory issues, adjustment endpoint (API)	Integrators will now have the purchase receipt number exposed in both inventory receipt API endpoints: - GET api/v1/inventoryReceipt and - GET api/v1/inventoryReceipt/{inventoryReceiptNumber} API endpoints	☑	9.77.0
Expose the purchase receipt number in the inventory receipt endpoint	Integrators will now have the purchase receipt number exposed in both inventory receipt API endpoints: - GET api/v1/inventoryReceipt and - GET api/v1/inventoryReceipt/{inventoryReceiptNumber} API endpoints	☑	9.69.0
I will translate the ref file AR303000 (Customers) into Swedish so that it can be published to Staging, and then after that to Production.		☑	
The ref files in the Supplier ledger module were released to Production Friday 9 September. I need to check them to see if there are any mistakes to correct or any formatting issues that I need help with.		☑	
There are some wrong elements above the tables and the tables do not have the correct styling.		☑	
Correct branch opened on Invoice inbox notification link	If you have a company with multiple branches and get an Invoice inbox notification, the link will open the Invoice inbox window with the branch displayed that is set on the invoice instead of opening the main branch.	☑	8.34.0

Wrong result when exporting Balance with external codes (GL63201S) to Excel	When exporting the report Balance with external codes (GL63201S) to Excel, the report needed extensive formatting in Excel so that it could be used for analysis. This has now been corrected by letting the report come through the export without merging or hiding any columns. To achieve this, you must change a property in the Report designer and indicating column sequence before exporting to Excel. In GL63201S, click Edit report. On the right side of the Report designer window, you have Properties. If you can't see the Properties area, activate the report by clicking just outside the different fields of the report. In the Layout section of Properties, set Excel mode to Manual. This is a new setting and was previously not available. This setting makes it possible for you to split the columns instead of merging and hiding them. When this is done, you need to ensure that columns are separated by giving each a sequence number. First of all you need to change the selection of properties from the whole report to each field. Do that by clicking on the field you want to set as column number 1. In the Layout section, ensure the part about Excel is expanded. When that is done, you will see the Column field. This field indicates the column number. Enter 1 for the first column you want on the report. Click the next field in the report you want to include in the Excel and enter 2. Continue like this until you have the sequence and the number of columns you want in your report. Preview your work to ensure the desired result.	☑	8.47.0
testing		☑	
Improved company filter in the Notifications Centre	The company filter in the Notifications Centre will now by default display the company you are logged into. You can also set the filter to display all companies available for you. Previously, the filter displayed by default all companies.	☑	8.23 (200609)
For Internal and Stage environments update SnowplowCollectorUrl to "snowplow-test.visma.com"		☑	
Remove non-stock items from the Validate inventory (IN505000) window	Earlier, non-stock items were also displayed in the Validate inventory (IN505000) window. They have now been removed, since they do not need to be validated.	☑	8.87.0
Improve the performance of the validation process	The performance of the Validate inventory (IN505000) window has been improved by around 20%.	☑	8.87.0
Expand the filter section in the Validate inventory (IN505000) window	The following changes have been made in the Validate inventory (IN505000) window: -A page counter has been added to the page navigation buttons. -A record counter has been added to the bottom of the page, which displays the total amount of records.	☑	8.87.0
Add new column ValidationDate in the database + UI	A new column 'Validation date' has been added to the Validate inventory (IN505000) window. This column shows the date when the inventory was last validated for each line.	☑	8.87.0
Notifications for new invoices in the Invoice Inbox in status: Error	In the Notification Centre, you will receive a message if an invoice is in error state after being processed. This notification is activated in the Custom notification window (SM205041), and you are set as recipient.	☑	8.34.0
Notifications for new invoices in the Invoice Inbox	You will be notified when Invoice Inbox receives new invoices. You can activate this notification in the Custom notifications window (SM205041) and you are set as recipient.	☑	8.33.0
Notify users having a relation to a document or entity so that they can take action accordingly	Now, there is one more source to be selected when creating custom notifications. In addition to User and Role, you can also select Document. When selecting Document, the contacts associated with the specific document will be the recipient source.	☑	8.24 (200623)
LiveLeader ChatGPT enabled for Swedish customers	LiveLeader ChatGPT now includes support for the Swedish language, making communication more accessible and user-friendly for Swedish companies.	🔖	9.75.0

Navigation in Notifications window improved significantly	Navigation in the Notifications (SM205050) window with different statuses has been improved significantly. The results are displayed immediately.	🔖	9.55.0
New report IN61551S - Inventory valuation by location	There is a new report Inventory valuation by location (IN61551S) that displays information on the location of each warehouse.	🔖	9.42.0
Deletion process for pending automatic notifications improved	The deletion process for automatic notifications with the status Pending, in the Send notifications (SM205050) window, has been improved. This means that when you delete these notifications, the "System out of memory exception" error message is no longer displayed.	🔖	9.49.0
New general functionality for exporting from grids to file (Excel)	Export to file (Excel) New general functionality for exporting from grids to file (Excel). Clicking the arrow icon for Excel export, you can select which type of export format you want. - Excel, same functionality as before - CSV, general file export format with only data records.	🔖	9.77.0
Refresh dashboard widgets of Scorecard KPI and Trendcard KPI types	On Dashboard pages, it is now possible to refresh widgets of the Scorecard KPI and Trendcard KPI types.	🔖	9.27.0
Stock items with the status "No purchases" no longer appear in Prepare replenishment window	To make a stock item not appear on the Prepare replenishment window (IN508000), you used to set the item status to "Inactive", but that made the item impossible to sell. By setting the status to "No purchases" instead, you remove the stock item from the Prepare replenishment window, but keep it possible to sell.	🔖	9.27.0
An improved and easier way of getting historical inventory valuation	The Historical inventory valuation summary (IN61800S) report has been changed to display all products that have stock value at the specified period, instead of only showing products with a change in value during the selected period. In the Historical inventory valuation summary (IN61800S) window the following columns have been renamed from - Begin cost - Cost - End cost to - Begin value - Value change - End value In the Inventory valuation (IN61550S) window, column Total cost has been renamed to Total value.	🔖	9.18.0
The Inventory/receipt API expanded to get Lot/Serial no.	The Inventory/receipt API now also contains an option to get Lot/Serial no. from the Receipts (IN301000) window in the Inventory workspace.	🔖	9.18.0
As part of translating all the ref files in the General ledger windows, I will translate the ref file in window GL40100S (SIE export), into Swedish.		🔖	
View drill-down details from a dashboard widget and keep your original dashboard	When you are working in the Dashboard windows and need to drill down in information, you now have the possibility to open the details in a new window. By doing that, you also keep your original dashboard. In addition, you have several options on how you prefer the details to open. You can, for example, open your details * in a new tab * as a pop-up window or * in the same tab	🔖	9.03.0

Expand the filter section in the Validate inventory (IN505000) window Remove non-stock items from the Validate inventory (IN505000) window Add new column ValidationDate in the Database + UI Improve the performance of the validation process	SIGMA-67365 A new column Last validation date has been added to the Validate inventory (IN505000) window. This column shows the date when the inventory was last validated for each line. SIGMA-67366 The following changes have been made in the Validate inventory (IN505000) window: -The buttons 'Process' and 'Process all' have been renamed to 'Process selected' and 'Process range'. -The fields 'From' and 'To' have been added for selecting the processing range. -A page counter has been added to the page navigation buttons. -A record counter has been added to the bottom of the page, which displays the total amount of records. SIGMA-67836 Earlier, non-stock items were also displayed in the Validate inventory (IN505000) window. They have now been removed, since they do not need to be validated. SIGMA-67829 The performance of the Validate inventory (IN505000) window has been improved by around 20%.	🔖	8.87.0
Customer feedback on end user documentation	It is now possible for a user to give feedback on our end user documentation. By introducing the customer feedback feature in Help Centre, we're hoping to get to know our users a little better and understand how they use our help. This is important for us in order to improve our documentation. We will start with the top 20 most visited help articles. This feature will be available in version 8.42.	🔖	8.42.0
Performance of Prepare replenishment window improved	The performance of the Prepare replenishment (IN508000) window has been improved. There is a new Prepare button in the window. When you enter the window and select a warehouse and/or uncheck the Show suggested quantity option, you should press the button. Also, if you have new items or changed settings on existing items, you should press the Prepare button. After this the values are saved and you can do additional filtering if preferred.	🔖	8.97.0
New ways of selecting stock items in the Prepare stocktaking window	There is now new ways of selecting stock items in the Prepare stocktaking window. You can now, directly in the Prepare stocktaking window, manually select the items you wish to be included in the Stocktaking count window.	🔖	8.34.0
Available quantity visible in the Prepare replenishment window	Available quantity is now visible in the Prepare replenishment (IN508000) window.	🔖	8.25 (200908)
Change access rights for the check box "Update general ledger" in the Inventory preferences (IN101000) window	In the Inventory preferences (IN101000) window, you have the check box "Update general ledger" to enable/disable the creation of general ledger transactions for inventory transactions. This should only be used the first time you start using the system when importing stock transactions. For this reason we have removed this option (made it read only) for all roles except Administrator.	🔖	8.25 (200908)
Custom notifications enabled for AP301000	When creating a new custom notification, you will be able to select window ID: AP301000 - Purchase invoices. Under Custom Notifications, screen SM2050PL, you can find a new static notification that contains information about invoices that are released with missing IBAN.	🔖	9.21.0

Remove recurring header in Excel export	In Excel export from Financial reports (ARM reports), the page header is now exported only once to the Balance sheet and Profit and loss reports.	▣	F2020 05, Visma. Net ERP Kanban week 24, Visma. Net ERP Week 24
New field in Summary of historical inventory valuation report (IN61800S)	A new column called "End qty" has been added to the report, which displays the quantity of the item per "End period".	▣	F2020 05, Visma. Net ERP Kanban week 24, Visma. Net ERP Week 24
Use last cost if there is no available stock (FIFO)	If the item has the valuation method FIFO, the value in the Unit cost column on the sales order will use "Last cost" if there is no available quantity for the item.	▣	F2020 05, Visma. Net ERP Kanban week 24, Visma. Net ERP Week 24
Filter overdue and soon to be overdue notifications	You are now able to filter notifications that are - Overdue: shows only notifications with the deadline overdue, showing the number of "days ago" in red - Soon to be overdue: shows only notifications close to their deadline, up to 3 days, showing in yellow, number of "days left"	▣	F2020 05
Kit specifications as a hyperlink in Stock items and Non-stock items windows	In the Stock items and Non-stock items windows, you can now navigate to the Kit specification window by clicking the"Kit specification" hyperlink next to the "Is a kit" check box. This is only available for items with the "Is a kit" check box selected.	▣	8.25 (20090 8)

Set properties for a subreport in a report	In the Report Designer, you are now able to set properties for a subreport in a report.	🔖	Custo mer Succe ss Misc, 8.25 (20090 8), Visma. Net ERP Kanba n week 24, Visma. Net ERP Week 24
CompanyID: 4975077 OK to copy DB At Barkonsult in the company Barkonsult AS, they have managed to send batch numbers via BX that contain invalid characters. This concerns products: 403066 - Batch 00506067102400590289919200023\u001d 403039 - Batch 00506067102400470253919200026\u001d 403105 - Batch 00506067102400310290919200025\u001d Purchase Order: 2300004 The invalid character is not visible in Visma.net or in inquiries, but it appears in reports that are run. It is not possible to select the batch via the GUI on deliveries, but it is automatically selected via their FIFO. As soon as the batch is selected on a line on a delivery, it is no longer possible to retrieve the "pick lists" via the API because the character crashes the XML received. Can we remove the invalid characters in the DB?		🔅	
Timeout in the Prepare stocktaking (IN504000) window	Earlier, the Prepare stocktaking (IN504000) window timed out in some cases when using the Generation method "By movement class" and selecting the "By frequency" check box. This has now been fixed.	🔅	8.88.0
Calculate replenishment quantities improved	The Calculate replenishment quantities (IN508500) window has been fixed so that it is faster and all items should now be shown.	🔅	8.56.0
The Report designer component is upgraded to improve security	The Report designer component that can be used on most reports in Visma.net ERP has now been upgraded to improve security. There have not been any issues with security for this component, and the upgrade is done as a result of an internal assessment. While improving the security, also the visual presentation of the feature has been reworked to be more in-line with the rest of the service. The functionality remains the same.	⚡	8.39.0
Multilingual support	Multi-language is now supported across the whole system. This functionality is set up via the System locales (SM200550) window using the Set up languages button. Define a default language and you can apply a localised description in multiple places in the system, like in Stock items and Non-stock items for example. These will again be used based on document language defined on customer/supplier.	⚡	8.26.0 (8.26.0 8.1036)
Notifications for all released supplier ledger documents that are missing IBAN	When you release several supplier ledger documents with missing IBAN, you would receive a notification. This applies for transactions made in AP, EP, Invoice Inbox and Expense Inbox windows. This feature is toggled.	⭕	9.30.0

Max./Min. and Close buttons visible in Help Centre	Earlier, the Max./Min. and Close buttons were not visible in the Help Centre window. This has now been fixed.	🔲	9.12.0
Messages cut off in top panel	The messages about new releases are no longer cut in the top panel.	🔲	8.87.0
Hyperlinks not supported in dashboard header widgets	Hyperlinks are no longer supported in dashboard header widgets.	🔲	8.26.0 (8.26.0 8.1036)
API endpoint /api/V2/stocktake/{referenceNumber} producing error messages in incorrect format	Previously, the API endpoint /api/V2/stocktake/{referenceNumber} produced error messages in incorrect format when trying to add a duplicate line. This has now been corrected.	🔲	9.73.0
Serial number not validated when creating an inventory issue via API	Previously, the serial number was not validated when posting an issue using the POST /api/v1/InventoryIssue API endpoint. This made it possible to create an issue with a serial number that had already been used. This has now been corrected.	🔲	9.70.0
When a serial profile is changed from "When used" to "When received" it is possible to receive serial numbers that have been used previously **	Previously, it was possible to receive a previously used serial number if the serial tracking profile had been changed from "When used" to "When received". This has now been corrected.	🔲	9.73.0
Earlier, it was impossible to add more than one supplier to stock items included in kits	Previously, adding more than one supplier to a stock item that was also a kit item was impossible. This has now been corrected.	🔲	9.69.0
Window Import updates from templates (CS10302S) failed to open	In version 9.60, window Import updates from templates (CS10302S) failed to open. This issue is now resolved.	🔲	9.61.0
When you were using stock item paste, the Automatic incremental value was not copied correctly	For a short period of time, when using the paste function in the Stock items (IN202500) window, the Automatic incremental value was not copied correctly. This has now been corrected.	🔲	9.61.0
Restored quantity after deleting purchase order (lines) created from Prepare replenishment	Earlier, when you created a purchase order from the Prepare replenishment (IN508000) window, and then deleted lines in the purchase order or deleted the order, the quantity was not restored in the Prepare replenishment window. This was fixed by turning off a feature toggle for customers on 17.08.2023. The original problem is now solved in this version.	🔲	9.61.0
Unable to update cross reference via API for some types of the stock item	Updating the cross reference via API was not possible for item types: -Component -Sub assembly This is now corrected.	🔲	9.54.0
Adding special characters in duplicate item classes will break the Item classes (IN201000) window.	Earlier, adding the special character '*' in the field Class ID in the window Item classes (IN201000) would cause an error message and then break the screen's functionality. This has now been corrected by no longer allowing the character '*' to be used in the Class ID field.	🔲	9.71.0
Subassembly with multiple levels and different units give incorrect assemblies	Earlier, when creating a kit assembly which contained multiple levels of sub-assemblies, the quantity values were not calculated correctly. This has now been corrected.	🔲	9.69.0
Improved response time in Sales and Inventory windows	A new command in code for sales order and inventory windows that were to do a lookup in a database lacked information and caused delay in performance. This is now corrected	🔲	9.44.0
Error when updating the setting Default in window Stock items, tab Cross-reference	Previously, an error occurred when you updated the cross-reference default column in the window Stock items via an import scenario. This no longer fails.	🔲	Main, 9.67.0
Generic inquiry for a dashboard with parameters defined missing from the selection list	Parameters that are set for a dashboard are now displayed in the Generic inquiry window, under the Navigation parameters.	🔲	9.54.0
Receipt of non-stock item kits resulted in zero values on purchase accrual account	Previously, when creating a purchase order for non-stock kit item with stock item components, the costs were not correctly applied to the purchase accrual account. The difference is now as expected and the value in the purchase accrual account is in accordance with the purchase invoice amount.	🔲	9.37.0
Unexpected error message in Stocktaking review (IN305000)	Previously, when changing the serial tracking method from not tracked to tracking serial numbers on a stock item, there was an error in stocktaking in the Stocktaking review (IN305000) window. An error message was wrongfully displayed. This has now been fixed.	🔲	9.32.0

Serial numbers are now validated when creating allocation through POST Kit Assembly API	Serial numbers are now validated when creating allocations for kit assemblies through POST Kit Assembly API. The endpoint displays an error message if you are trying to use a serial number that has already been allocated.	■	9.30.0
Allocating serial numbers for kit assemblies with automated number generation is now validated to avoid double allocations	If you add serial numbers manually to items that are set up to automatically allocate serial numbers, the systems does no longer create double allocations. If you try to allocate manually, a validation will take place and an error message is displayed.	■	9.30.0
Widgets on your dashboard are no longer compressed - and you can add a caption to each of them.	Previously, the widgets you had on your dashboard suddenly were compressed and changed visually. That is now corrected and in addition you have the option to display the captions of your widgets to emphasize the subject of each widget.	■	9.31.0
Static notification message about missing IBAN in Purchase invoices window displaying the correct invoice number	The static notification about missing IBAN now displays the correct invoice number in the Purchase invoices (AP301000) window. To make the static notification work, remember to set it as active when setting it up.	■	9.22.0
Copy/paste of stock items no longer fails	Stock items with a cross-reference can now correctly be copied and pasted.	■	9.19.0
The newly added default field for the cross reference in the table now updates correctly	The DefaultAlternateID field is now correctly updated in the database when an existing alternate ID is changed on a stock item.	■	9.20.0
Unit of measure for kit assemblies is recalculated and coordinated according to base unit for item	When creating a sub-assembly containing items with different units of measure (UoM), the system recalculates the UoM for the whole assembly according to the UoM of the base unit.	■	9.18.0
Not able to update Default issue from or Default receipt to on stock item of Subassembly type	You can now correctly update Default issue from and Default receipt to properties for all types of stock items using the Inventory API endpoint.	■	9.20.0
Preventing simultaneous processes in the Replenishment window (IN5080000)	Previously, the replenishment process in window Replenishment (IN508000) could be initiated simultaneously by different users. This caused incorrect data in the system. This has now been corrected. It is no longer possible for more than one user at the time to initiate the Process or Process all features.	■	9.47.0
VAT codes on item classes not applied to children	VAT codes are now correctly applied to children item classes when the action "Apply to children" is used in the Item classes (IN201000) window.	■	9.20.0
Prepare replenishment calculating Outgoing field incorrectly	Earlier, in the Prepare replenishment (IN508000) window, the Outgoing field was wrongly calculated. This has now been fixed.	■	
Description filter working again when preparing replenishment lists	Filtering with the Description field in window IN508000 Prepare replenishment does no longer fail.	■	9.17.0
Error in processing in Prepare replenishment window	Earlier, Visma.net ERP threw an error when processing replenishments in the Prepare replenishment (IN508000) window. This has now been fixed.	■	8.99.0
Prepare replenishment loses selected items	Earlier, in the Prepare replenishment (IN508000) window, when you moved from one page to another, the system didn't keep the selection of items. This has now been fixed	■	9.00.0
Supplier's lot sizes not working in preparing replenishment	Earlier, lot sizes that were set on the supplier didn't work in the Prepare replenishment (IN508000) window. This has now been fixed.	■	9.00.0
Filtering with product manager or work group in Prepare replenishment window	Earlier, in the Prepare replenishment (IN508000) window, filtering with product manager or work group did not work. This has now been fixed.	■	8.98.0
Wrongfully update of item weight when executing validate inventory (IN505000)	Earlier, in some scenarios, weight of item could be wrongfully multiplied by a factor when executing Validate inventory (IN505000). This resulted in wrong weight being set for these items on shipment. This has now been fixed.	■	9.08.0
Variance quantity not affected after import with Physical quantity set to 0	Earlier, when importing records from a file in the Stocktaking review (IN305000) window, the Variance quantity was not correctly updated. This has now been fixed.	■	8.90.0
When disassembling a kit with a lot/serial number that has been used before, the system uses the wrong components	Earlier, when disassembling a kit with a previously used serial number, the system used kit components from the first time the serial number was used, instead of components from the current kit with that same serial number. This has now been fixed.	■	9.12.0
Information entered in the blank lines during stocktaking will now be correctly included in the stocktaking	Information (Item ID, Item, Warehouse etc.) entered in the blank lines/fields during stocktaking will now be correctly included in the stocktaking. Previously the lines with blank fields were ignored during stocktaking.	■	9.22.0

Unable to release adjustment for receipt where original receipt amount is no longer available	Previously, you could not create an adjustment to add landed costs on a receipt if there was no more available quantity on the products. This has now been fixed.	▣	9.18.0
Error in Update standard costs	Earlier, an error occured in the Update standard costs (IN502000) window when a product was assigned to more than one warehouse. This has now been fixed.	▣	8.80.0
Critical timeout when preparing stocktaking (IN504000)	Earlier, there was a critical timeout when preparing stocktaking (IN504000) by using the By cycle type. This has now been fixed.	▣	8.78.0
Edit subreports by accessing the window in the URL	It is now possible to edit subreports again, by directly accessing the window in the URL.	▣	8.77.0
Editing reports failed after re-logging with duplicate tabs	Earlier, editing reports after re-logging with duplicate tabs failed. This has now been fixed.	▣	8.75.0
No more need to save widget twice for it to display data	Previously, when adding an inquiry based widget to your dashboard, you had to save it twice for it to display the data. This has now been corrected.	▣	9.32.0
Wrong available quantity displayed in the Shipments window (SO302000)	Previously, the available quantity was not displayed correctly in the Shipments (SO302000) window. This has now been corrected.	▣	9.35.0
Item description missing in Inventory summary (IN401000)	Earlier, the Inventory summary inquiry (IN401000) was missing columns for item description. This has now been fixed.	▣	8.77.0
Error with conversion factors for units of measures when creating a new item class	Previously, the conversion factors for units of measures did not work correctly in the Item classes (IN201000) window. This has now been fixed.	▣	9.31.0
One-step transfers resulting in incorrect values for availability in warehouse	Earlier, one-step transfers would sometimes result in incorrect stock values. This has now been fixed with the new O2C_TransfersDataInconsistencyImprovement feature.	▣	8.91.0
Issue in improved transaction safety handling for inventory transfers when transferring items from one location to another using serial number tracking	In version 8.47, there was a new bug that affected improvement of transaction handling for release of inventory transactions (IN304000). This improvement was therefore deactivated on all production companies. This was applicable when transferring items from one location to another using serial number tracking. When the inventory transfer was released, the quantities were removed from the source location but were not added to the target location.

This has now been resolved and the improved transaction handling will be reactivated, ensuring that committing partial updates of data will not happen. | ▣ | 8.50.0 |
| Improved transaction safety for inventory transactions | Improved the transaction safety for inventory receipt, issue, adjustment and transfer. This will remove the possibility for partial commitment of data in the system, which leads to better data integrity. | ▣ | 8.47.0 |
| Duplicate records when preparing stocktaking for stock items in multiple locations | Earlier, if you had the "Advanced stocktaking" feature activated and had set a stocktaking cycle and a movement class on a stock item that was available in multiple locations, the item lines were duplicated for each location when preparing the stocktaking count.
This has now been fixed. | ▣ | 8.41.0 |
| Error message not referring to the reference number of the location when adding a duplicate stocktaking line | Earlier, when you added a duplicate stocktaking line in the Stocktaking review (IN305000) window, the error message in the Location column referred to an internal ID instead of the reference number of the location.
This has now been fixed. | ▣ | 8.39.0 |
| The number of rows in the Prepare stocktaking window does not follow the user setting for number of records to be displayed | Earlier, the number of visible rows in the Prepare stocktaking (IN504000) window showed the number of rows based on screen size (height), instead of using the setting "Number of records to be displayed on grid page(s)" in the User settings (SM203010) window.
This has now been fixed. | ▣ | 8.39.0 |
| Transactions from locations are not visible on the "Historical inventory valuation" report | Earlier, the "Historical inventory valuation" report (IN61700S) did not show transactions from locations that had the check box "Cost separately" selected in the Warehouses (IN204000) window.
This has now been fixed, and the amounts are now included in the report. | ▣ | 8.42.0 |
| Unit conversion error when trying to assemble a kit with packaging details | Earlier, when you added packaging details (kg and liter) on a Kit with an expiration date set on the lot/serial class, an error occurred when trying to assemble the kit.
This has now been fixed. | ▣ | 8.41.0 |

General ledger sales accounts not visible in Warehouses (IN204000) window	Earlier, the sales accounts Sales - non-taxable account, Sales - EU account and Sales - export account were not visible in the Warehouses (IN204000) window. This has now been fixed.	🟥	8.86.0
The wrong cost when the base UOM is higher then Purchases UOM. Steps to reproduce the cost: 1. Create a stock item and add a different UOM for Purchase than the Base UOM add conversion factor for UOM like in the picture		🟥	
Improved navigation in the Stock items list window for items with alternative item IDs	The system opens the first item on the list when you: - add an Alt. item ID in the Stock items (IN202500) window - add the table INitemXRef to the Generic inquiry (SM208000) window for inquiry title IN-StockItem and - click on items with alternative item IDs of the Global or Barcode type in the Stock items (IN2025PL) list window. To improve the search results, a new column Default was added to the Stock items window, the Cross-reference tab, and the possibility to add DefaultAlternateID to the InventoryItem table in the Generic inquiry window, instead of needing to add the INItemXRef table. When selecting an alternative item ID as the default, you will now be navigated to the correct item when clicking the item in the Stock items list window.	🟥	9.15.0
Wrong report editor opened when working with several companies and duplicated tabs	When you worked with duplicated tabs and several companies, the updates to the report you were editing were incorrectly published to the company in which you started editing it instead of the company you actually published it to. This has now been fixed.	🟥	8.75.0
In the API for Inventory, the field "salesCategories" now returns the sales category ID and description.	Previously, the "salesCategories" field in the Inventory API endpoint returned the sales category description. Now it returns both the category ID and the category description.	🟥	9.34.0
The Auto incremental value field is disabled when selecting Track lot number	The maximum number of serial numbers that can be generated at once for items of this lot/serial class. If a larger quantity of the item is specified on a document, you will get an error message telling you that you have more than enough quantity, and because of that there will be unassigned numbers. You need to enter a new line for the exceeding quantity. You can initiate assignment of serial numbers for unassigned quantity of the item manually.	🟥	8.26.0 (8.26.0 8.1036)
Filtering on Company name in the Notification Centre	Notification Centre now filters notifications by default. The Notification Centre will display the company you log in with and it is possible to filter on other companies accessible to you.	🟥	8.28.0
When using import scenarios to import items with item IDs containing special characters, they will be replaced with space in the database	Earlier, when using import scenarios to update or create new stock/non-stock items where the item ID contained special characters, the database automatically replaced them with space. This has now been fixed.	🟥	8.25 (20090 8)
A period has unreleased inventory documents, but the report can not find any	The subreport "Unreleased inventory documents" from the report "All unreleased documents" (GL65601S) did not capture all open inventory documents. This has now been fixed.	🟥	8.25 (20090 8)
Replenishment class is missing on Item warehouse details (IN204500)	Item warehouse details (IN204500) will now use the replenishment class from the item class if no replenishment class was set on the warehouse. We have also added two new actions in the Warehouses window (IN204000), to update all replenishment classes not set on the Item warehouse details, or all on Item warehouse details according to current replenishment class on the selected warehouse. This will minimize the risk for empty values, and also makes the update process much easier. The result is a much better user experience of the replenishment functionality.	🟥	8.26.0 (8.26.0 8.1036)
Dashboard widgets added as embedded page will have their URL validated	In the dashboard, when you add widgets as embedded page type, the source entered must be a valid URL. The system will perform a validation.	🟥	8.25 (20090 8)

Line not saved when adding report to window	Your line will no longer be lost when adding a report to a window before adding a description.	🔲	8.28.0
In Inventory transaction details (IN404000), the beginning balance of a period is not equal to the ending balance of the previous period	Earlier, when a user had multiple adjustments, transfers, issues and receipts for the same item on a financial period, the beginning balance was different than the ending balance of the previous month in the "Inventory transaction details" inquiry. This has now been fixed.	🔲	8.25 (200908)
The Summary of historical inventory valuation inquiry (IN61800S) gives incorrect data	Earlier, the Summary of historical inventory valuation inquiry (IN61800S) did not include all existing lines in the calculations, when there were multiple warehouses. This has now been fixed and the inquiry is now showing the correct data.	🔲	8.23 (200609)
The "Summary" and "Allocation details" buttons not working properly in "Inventory transaction history" inquiry	In the last release, we saw that the "Summary" and "Allocation details" buttons from the "Inventory transaction history" window, were not working anymore. This has now been fixed.	🔲	F2020 05
Schedules for automatic processing not executed (IN505000)	In the Validate inventory history (IN505000) window, schedules for automatic processing were not executed. This has now been fixed.	🔲	8.25 (200908)
The inquiry Allocation details shows incorrect value when having the same stock item on several purchase orders	Earlier, the inquiry Allocation details (IN402000) did not display the correct value when the same stock item was included in several open purchase orders, and partial quantities were included in a purchase order receipt. This has now been fixed.	🔲	F2020 05
Lost attribute on item	Earlier, when you had an attribute value on an item, the value was deleted. This happened when the item class of the item was copied and pasted to a new item class and the attribute was deleted from the new item class. This has now been fixed.	🔲	8.25 (200908)

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NeXtGen services

NeXtGen Sales Order Service (OC)

Release note title	Release Notes.	Komponent(er)	Ret version(er)	Last	T
Support for invoice number	It is now possible to add an invoice number in an order, when the order type allows it.	API	1.0.11. 73	dec. 22, 2021	🔖
Support for InvoiceDate	It is now possible to set the invoice date for an order, when the order type requires it.	API	1.0.11. 73	dec. 22, 2021	🔖
Support for setting financial period	It is now possible to set the financial period for an order, when the order type requires it.	API	1.0.11. 78	dec. 29, 2021	🔖

Implemented error message when TermsID is empty when creating a sales order	Earlier, when TermsID on a Customer had the NULL value and POST did not specifically state TermsID, the TermsID on a sales order was set to NULL. This is not valid and will now return a response status 400 with the message "TermsID can not be empty in the order. Set a default term on customer or specify the term for the order."	API	1.0.11. 86	jan. 04, 2022
Support for setting cash discount date	It is now possible to set the cash discount date for an order, when the order type requires it.	API	1.0.11. 93	jan. 05, 2022
Support for setting invoice due date	It is now possible to set the invoice due date for an order, when the order type requires it.	API	1.0.11. 93	jan. 04, 2022
Support for warehouse location in order line	It is now possible to set the warehouse location for order lines, if required by the order type.	API	1.0.11. 93	jan. 05, 2022
Support for setting operation on lines	Setting operations Receipt and Issue on the line level is now supported when creating a new sales order. This is part of supporting all automation behaviors to prepare support for all order types.	API	1.0.11. 105	jan. 10, 2022
Validate required reasonCode for line, when order type's line operation requires it	A POST request to create a new sales order with a new line is now required to have a reasonCode when the operation on the line requires it. You can manage this requirement in the Order types (SO201000) window, by selecting or deselecting the "Require reason code" check box for the operation of the specified order type. This is part of supporting all automation behaviors to prepare support for all order types.	API	1.0.11. 108	jan. 10, 2022
WarehouseID set for free item line generated by group discount	Earlier, when using POST for an order where a free item group discount was set, the warehouseId would not be set for the generated free item line. This has now been fixed and the warehouseId is set according to the default settings.	API	1.0.11. 108	jan. 10, 2022
'Auto create issue' set for line if required by order type's line operation	For a POST request to create a new sales order with a new line, the 'Auto create issue' will now be set, if the operation on the line requires it. This is managed by selecting the 'Create issue line automatically' setting for the operation of the specified order type in the Order types (SO201000) window. This is part of supporting all automation behaviours to prepare support for all order types.	API	1.0.11. 108	jan. 10, 2022
Shipping rule for IN order types	The business logic for setting the default Shipping rule for an order of type IN has now been implemented. In this scenario, the Shipping rule is set to Cancel Remainder as default. For this type of order, the Shipping rule "Back order allowed" is not accepted and you will receive an error if this value is included in POST.	API	1.0.11. 132	jan. 14, 2022
Support for order payment method	Setting the default payment method for a sales order based on the customer settings is now supported. The payment method can also be set in POST, which overrides the default value.	API	1.0.11. 132	jan. 14, 2022
Added support for Total cost	Calculating the Total cost field for a sales order is now supported.	API	1.0.11. 132	jan. 19, 2022
Support for all order types other than TR	The automation behaviour for all order types other than TR is now supported. This includes custom defined order types using the default order types as templates. TR order types will be supported at a later stage. There are added fields in the sections financialInformation (invoice related fields), paymentSettings (payment related fields) and lines (operation of the line) in GET and POST.	API	1.0.12. 3	jan. 24, 2022
Added support for cash account	Providing the cash account for an order is now supported in POST. When the cash account is not provided, the default cash account of the customer will be set.	API	1.0.12. 3	jan. 21, 2022
Additional validation for cash account	Further improvement on cash account validation done by checking if "Use In AR" is not set on cash account in corresponding payment method. A response status 400 will be returned with information "Error: Cash account cannot be used with the set Payment Method.". Validation will be done both when CashAccountID is set automatically or manually.	API	1.0.12. 24	feb. 02, 2022

Update of swagger documentation for addresses and contacts	The swagger documentation has been updated with better explanations of the behaviour of fields related to shipping and billing address and contact.	API	1.0.12.36	feb. 07, 2022	✅
Correct unit cost when order currency differs from company base currency	Earlier, when the order currency was different from the company base currency, the unit cost of a line could be set incorrectly. This has now been fixed.	API	1.0.12.39	feb. 10, 2022	🔴
Discount on document and lines fully supported	Discount on both document and line level are now fully supported. This entails full support for document, group and line discounts according to configuration in the discount hierarchy when creating a new sales order. Document and group level discounts will be set automatically according to configuration. The same applies to line level discount supported according to branch, customer, customer price class, inventory price class, item, site (warehouse). In addition, overriding with manual discount on line level is supported, and setting manual discount flag on line level is automated when you override.	API	1.0.13.1	dec. 02, 2021	💲
'Created by' information in GET order response	The response from GET /api/v3/salesorders/{type}/{orderId} now includes the username of the user who created the order, provided that the order was created using the UI (the field Created by).	API, Interactive-API	1.0.13.12	feb. 17, 2022	🔖
Improved error message for postPeriod	Earlier, when postPeriod was set for an order type not allowing the period, the error message returned was 'The specified condition was not met for 'Post Period''. The error message has now been improved explaining the reason of the error: 'Post period cannot be set for this order type'.	API	1.0.13.15	feb. 18, 2022	🔴
Shipping rule 'Back order allowed' for order types not requiring shipment	Earlier, it was possible to set the shipping rule 'Back order allowed' for order types not requiring shipment. This has now been fixed, and the 'Back order allowed' shipping rule is not allowed anymore for these order types.	API	1.0.13.15	feb. 18, 2022	🔴
Libraries upgraded to .NET 6.0.3	Libraries have been upgraded to the latest .NET 6.0.3 March 2022 update.	API	1.0.13.46	mar. 09, 2022	🔖
Unbilled and Unshipped total amounts now set correctly	The Unbilled and Unshipped total amounts are no longer calculated incorrectly when an order contains lines with different operations.	API	1.0.13.46	mar. 09, 2022	🔴
Unit price now calculated correctly	The unit price is no longer calculated incorrectly when: - an order has a currency different from the base currency, - the unit price is collected from the default price of the item.	API	1.0.13.46	mar. 09, 2022	🔴
Unit cost set when quantity on hand is 0	The unit cost for a line is no longer set incorrectly when the quantity on hand for the set warehouse is 0. In addition, when the warehouse is not set on the line, the unit cost will be set based on the default warehouse for the item.	API	1.0.13.46	mar. 08, 2022	🔖
Improve performance when posting sales order with a large number of lines	The response time has been improved when posting new sales orders, especially when the request includes many lines. The specific problem was related to looking up and assigning subaccounts to sales order lines.	API	1.0.13.55	mar. 09, 2022	🔖
Support for use of Replacement cost	The system can now set the replacement cost of a line, which is based on the supplier price, supplier's last price or item's last cost. You use the useReplacementCostForProfitAndMargin option to determine which cost should be used in the margin, profit and total cost calculations for the order. When the option is activated, the replacement costs of the order lines are used. When the option is deactivated, the unit costs of the lines are used.	API	1.0.14.1	feb. 11, 2022	⚡
Added support for profit and margin	Setting the unit cost on a sales order line is now supported. Unit cost can be set in POST, otherwise, it is set automatically by the system. Unit cost is also included in GET. With the unit cost set on the order line(s), the total cost, margin and profit of the order will be set for orders created from the API. To use the unit cost on the lines for the total cost of the order, the option 'useReplacementCostForMarginAndProfit' should be set to 'false'.	API	1.0.14.1	jan. 28, 2022	⚡

Use Export type on customer location to set tax category	Earlier, the Tax category for an order line was selected based on the Export type of the customer class. This is now changed, and the system will first check the Export type on the customer location to set the Tax category. If the Export type on the customer location is not set, the selection of the Tax category is based on the Export type on the customer class.	API	1.0.14.7	mar. 22, 2022
Try out the API using swagger documentation	The swagger documentation has been improved and now provides the possibility to authorise with the authentication token endpoint from within the API documentation.	API	1.0.14.18	mar. 25, 2022
Swagger description update for External link	The External link field description in Swagger is now updated to better describe the purpose of the field.	API	1.0.14.18	mar. 25, 2022
Sales account now set correctly	The sales account is no longer always set based on the Export type set on the default customer location. It is now set based on the Export type set on the customer location selected for the order.	API	1.0.14.18	mar. 25, 2022
Customer location now correctly set when using GLN in POST	The customer location of an order is no longer set incorrectly when using GLN in POST to set the customer and customer location for the order.	API	1.0.14.18	mar. 24, 2022
Quantity in Allocations now set correctly	Earlier, the base order quantity was not set correctly in the SOLineSplit table, containing the Allocation data of the order, when creating an order with an order type that does not require shipping. This has now been fixed.	API	1.0.14.55	apr. 14, 2022
No more errors when passing in empty arguments to inventory endpoints	Empty arguments for the inventory availability endpoint (for example "?inventoryId=&locationId=&warehouseId=") no longer return a 500-InternalServerError response. They will now be ignored.	API	1.0.14.57	apr. 20, 2022
Support for adding item with alternative ID	Adding an item to an order line based on alternative ("alternate") ID's is now supported. If in a company, no item is found based on the internal item ID, the system will search for items based on alternative ID's. If a match is found, the item is added to the line. The used alternative ID will be shown in GET/api/v3/SalesOrder/{type}/{orderId}/lines in the field "alternateId".	API	1.0.14.75	maj 04, 2022
Shipment can now be created	Earlier, when trying to create a shipment for an order, you received the error: "Order does not contain any items planned for shipment". This has now been fixed and shipments can be created.	API	1.0.14.75	maj 04, 2022
Line discount code for customer-specific price	Earlier, in POST, you could not set the line discount code for an order line manually, when you in the Accounts Receivable Preferences had set that line discounts are not applied to customer-specific prices, and the order line had a customer-specific price set. This has now been fixed.	API	1.0.14.100	jun. 08, 2022
Order invoice address now works correctly	The ID set in the database for an order's invoice address is no longer incorrect. As a result, orders with the same address are no longer invoiced separately and are now collected on a single invoice.	API	1.0.14.118	jun. 20, 2022
County in invoice address now set correctly	The County field in the customer's invoice address is no longer incorrectly populated with the country name. The County field is now populated with the customer's county name.	API	1.0.14.122	jun. 22, 2022
Shipping rule 'ShipComplete' now allowed for order types not requiring shipping	When you set shipping rule option 'ShipComplete' for an order type that does not require shipping, the rule is no longer incorrectly replaced with the 'CancelRemainder' rule.	API, Interactive-API	1.0.14.132	jul. 01, 2022

Warehouse location for non-shippable items no longer mandatory	Earlier, the warehouse location was incorrectly required for non-shippable items (Line type = Misc. charge) for order types requiring warehouse location. This has now been fixed.	API	1.0.14. 134	jul. 05, 2022
freightCost and freightTotal added to the SalesOrderDto	Freight properties freightCost and freightTotal have been added to the SalesOrderDto/totals.	API	1.0.14. 160	aug. 03, 2022
HasManualPrice property exposed in GET /salesorders/{type}/ {id}/lines endpoint	The HasManualPrice property has been added to the line in the GET /salesorders/{type}/{id} /lines endpoint. This field indicates if the unit price of the line has been added manually or by the system.	API	1.0.14. 171	aug. 11, 2022
Changed code for error message: "Currency Id can not be overridden" in POST /salesorders	Earlier, the "EqualValidator" error code was used when a currency could not be overridden. Now the error code has been changed to "1408-OverrideCurrencyIdProhibited".	API	1.0.14. 214	sep. 08, 2022
Total cost decimal places now set correctly based on currency	The decimal places in an order's Total cost are no longer incorrectly set based on company settings. The decimal places are now set based on the currency.	API	1.0.14. 214	sep. 07, 2022
'hasManualPrice' now supported in POST	The field 'hasManualPrice' has been added in POST/api/v3/SalesOrders. This field is used to indicate that the unit price of the order line has been added manually. If 'hasManualPrice' is not provided although unitPrice is provided in POST, the system will automatically set 'hasManualPrice' to 'true'.	API	1.0.14. 223	sep. 21, 2022
Subaccount error when POSTing order	Earlier, you received an error when you created an order where the default subaccount of an order line contained a segment with an empty segment value. This has now been fixed.	API	1.0.14. 338	dec. 15, 2022
Unit price not set correctly in POST lines	Earlier, the unit price was not set correctly when you added an order line (POST lines) to an existing order, also affecting the setting of line and header discounts. This has now been fixed.	API, Interactive-API	1.0.14. 369	jan. 11, 2023
GET - Sales Order V3 Endpoint / CustomerID filter now works correctly	The CustomerID filter no longer fails to return data when the customer ID value is shorter than the customer segment length defined in the system.	API	1.0.14. 381	jan. 13, 2023
No more error when deleting order lines with item based line discount	When you delete lines in an order with line discounts based on item, the system no longer returns a 500 error.	API, Interactive-API	1.0.14. 383	jan. 18, 2023
Improved error message when the 'Apply quantity discounts to' field in the Customer ledger preferences window is empty	Earlier, when you created an order while the 'Apply quantity discounts to' field in the Customer ledger preferences (AR101000) window was empty, you would receive an unclear error message.

This has now been fixed and you will receive an error message explaining the problem and how to solve it. | API | 1.0.14. 385 | jan. 18, 2023 |
| 400 error when having non-existing customer set in POST | When you create (POST) an order with a non-existing customer you no longer receive a 500 error. You now receive a 400 error instead with error details explaining the customer is invalid or does not exist. | API | 1.0.14. 385 | jan. 18, 2023 |
| Ship via code is now supported in POST, PATCH and GET | The field 'Ship via' is now supported and available in POST, PATCH and GET. | API | 1.0.14. 387 | jan. 20, 2023 |

Priority, Residential delivery, Saturday delivery and Insurance now supported in POST, PATCH and GET	The fields Priority, Residential delivery, Saturday delivery and Insurance are now supported and available in POST, PATCH and GET.	API	1.0.14.388	jan. 20, 2023
FOB point is now supported in POST, PATCH and GET	The field FOB point is now supported and available in POST, PATCH and GET.	API	1.0.14.399	feb. 02, 2023
Header discounts not calculated correctly after updating quantity and unit price on line	Earlier, when you applied a quantity based group discount to an order and then updated (PATCH) the quantity and unit price, the header discounts were not triggered correctly. This has now been fixed.	API, Interactive-API	1.0.14.419	feb. 09, 2023
Shipping address and contact not set after update (PATCH) of customer location	Earlier, when you updated (PATCH) the customer location of an order, the shipping address and contact were not set correctly. This has now been fixed.	API	1.0.14.419	feb. 09, 2023
Discounts now applied to customers with trailing spaces in their IDs	Discounts based on customer ID no longer fail to be applied to orders with a customer ID that contains trailing spaces.	Frontend, Interactive-API	1.0.14.439	feb. 16, 2023
Order overview section no longer empty for some orders	Earlier, for some orders, the order overview section was empty. This has now been fixed, and the order overview section displays information such as Order total for all orders.	Frontend, Interactive-API	1.0.14.447	feb. 22, 2023
Shipping terms now available in POST, PATCH and GET	The field Shipping terms is now supported and available in POST, PATCH and GET.	API	1.0.14.457	feb. 24, 2023
Freight cost now available in POST, PATCH and GET	The field Freight cost is now supported and available in POST, PATCH and GET.	API	1.0.14.462	mar. 07, 2023
Premium freight amount is now supported and available in POST, PATCH and GET	The field Premium freight is now supported and available in POST, PATCH and GET.	API	1.0.14.465	mar. 09, 2023
Order freight total calculation now supported in GET	Order freight total calculation is now supported and an available field in GET.	API	1.0.14.477	mar. 14, 2023
Support for freight amount	You can now set the freight amount of an order based on the Ship via code and Shipping terms for the order. The field is available in GET.	API	1.0.14.477	mar. 14, 2023
Unit price and unit cost set correctly after updating order's date	Earlier, for orders with a currency different from the base currency, updating (PATCH) the order's date resulted in incorrect unit price and unit cost values. This has now been fixed.	API	1.0.14.479	mar. 16, 2023
Freight tax category now supported	Support for freight tax category has been added. The field is now available in POST, PATCH and GET.	API	1.0.14.486	mar. 17, 2023

Shipments tab available in UI	The Shipments tab has been added to the UI so that you can see the shipment, invoice and inventory transactions connected to the order.	Frontend	2.0.40 2	mar. 21, 2023	🔖
Change delivery address and contact when creating order	You can now change the delivery address and contact when you create an order, as long as the order has not been saved yet.	Frontend	2.0.40 2	mar. 21, 2023	🔖
Default delivery address and contact not set as unique anymore	Earlier, when creating an order, the default delivery address and contact were incorrectly set as unique for the order, which caused that the order could not be included in a batch shipment. This has now been fixed.	Frontend	2.0.40 2	mar. 23, 2023	⬛
UI calculations with negative discount amount now work correctly	Calculations no longer fail when you enter an order line with the unit price set to 0 and the discount amount to -10.	Frontend	2.0.41 2	apr. 04, 2023	⬛
Edit order with status Back order	Earlier, it was not possible to edit an order with the Back order status. This has now been fixed.	Frontend	2.0.41 2	mar. 24, 2023	⬛
Line discount applicable to 'Warehouse and customer' now applied before saving	Earlier, line discounts applicable to 'Warehouse and customer' were not applied before an order was saved. This has now been fixed.	Interactive-API	1.0.14. 507	mar. 27, 2023	⬛
Possible to add shippable non-stock item	A 500 error will no longer be returned when you in POST add an order line with a shippable non-stock item.	API	1.0.14. 508	mar. 29, 2023	⬛
Possible to use POST with unitPrice and discountAmount set to 0	POST of an order with 0 values for unitPrice and discountAmount no longer results in a 500 error.	API	1.0.14. 509	mar. 30, 2023	⬛
Support for Branch	Setting the branch on the header level for an order is now supported. The priority for setting the Branch ID is: 1. BranchID set in body 2. BranchID from call header 3. BranchID from customer location 4. Company's default branch ID	API	1.0.14. 510	mar. 31, 2023	🔖
Swagger documentation for POST lines and DELETE order and lines updated	The swagger documentation for POST lines and DELETE order and lines now includes information about the required ETag header.	API	1.0.14. 511	apr. 03, 2023	☑️

Added support for fields related to shipping and freight in the UI	The following fields are now available in the UI: In the overview panel - Ship via In the Delivery settings tab - Scheduled shipment - Ship separately - Shipping rule - Cancel by - Preferred warehouse ID - FOB point - Priority - Shipping terms - Shipping zone - Residential delivery - Saturday delivery - Insurance - Transaction type In the Totals tab - Order weight - Order volume - Freight cost - Freight amount (current field name: Freight) - Premium freight amount (current field name: Premium freight) - Freight VAT category	Frontend	2.0.457	jun. 01, 2023	
VAT now updated correctly after change of customer	Earlier, the VAT details for an order were not updated correctly after changing the customer. This has now been fixed.	Frontend	2.0.457	maj 17, 2023	
Branch now set correctly	Earlier, the branch for a created order was not set according to the selected branch in the company selector. This has now been fixed and the correct branch is set for the order.	Frontend	2.0.457	maj 19, 2023	
Validation of cash account based on branch	The cash account set on a sales order is now validated based on the branch set for the order.	API	1.0.14.516	apr. 06, 2023	
POST with Calculate freight activated for order type and shipping term set for order	Earlier, when using POST, the combination of an activated Calculate freight setting for the used order type and a set shipping term for the order, resulted in a 500 error. This has now been fixed and no error is returned.	API	1.0.14.516	apr. 06, 2023	
Added support for Original order type and Original order id	The fields originalOrderType and originalOrderId are now supported in GET, POST and PATCH.	API	1.0.14.519	apr. 10, 2023	
Support for including freight amount in the calculation of VAT	Including the freight amount in the VAT calculation, according to the selected freight tax category set on the order, is now supported.	API	1.0.14.520	apr. 10, 2023	
Quotation marks for "ETag" and "Match-if" headers	Quotation marks around the "ETag" and "Match-if" headers are now included in the response headers as per documentation.	API	1.0.14.532	apr. 13, 2023	
Added support for commissionable order line	An order line can no be set as commissionable.	API	1.0.14.546	apr. 24, 2023	
Added support for default salesperson	The default salesperson can now be set for an order.	API	1.0.14.552	apr. 26, 2023	

Preparing invoice for order created in Sales order API v3 works correctly now	For an order created via the Sales order API v3 with a bill address that is unique for the order, you no longer receive an error when trying to prepare an invoice.	API	1.0.14.567	maj 12, 2023	🔴
Support for items with status 'No sales' in sales order receipt lines	Items with the 'No sales' status can now be used in sales order lines with the 'Receipt' operation.	API	1.0.14.580	maj 24, 2023	🔖
Error when using non-existent order type	You no longer receive a 500 error when doing POST with an order type that does not exist. You now receive a 400 error: 'Order type cannot be found'.	API	1.0.14.580	maj 24, 2023	🔴
Added support for setting subaccount on order line based on salesperson	The subaccount on an order line can now be set based on the salesperson set on the order line.	API	1.0.14.580	maj 19, 2023	🔖
New field 'residentialDelivery' added and misspelled field 'resedentialDelivery' will be removed by 1/12/2023	A new field 'residentialDelivery' has been added in GET/api/v3/Customers/{customerId}/locations. The current field 'resedentialDelivery' is misspelled and will be removed from the endpoint with due date 1/12/2023.	API	1.0.14.594	maj 25, 2023	☑️
New Sales orders window available for all users	The new Sales orders (SO30100S) window is now available in the Financials menu, for all users. If you do not have the neXtGen roles, you will receive a message about missing user roles.	Frontend	2.0.481	jun. 09, 2023	🔖
Scheduled shipment now set correctly	Earlier, the Scheduled shipment date was not set correctly when the date was calculated to be before the order date. This has now been fixed, and the Scheduled shipment will not be set to a date before the order date.	Frontend	2.0.481	jun. 08, 2023	🔴
List of warehouses available again	Earlier, after you had saved an order and clicked + to create a new order, the list of warehouses in the Preferred warehouse ID field was not available. This has now been fixed.	Frontend	2.0.481	jun. 08, 2023	🔴
Icons now have tooltips	You can now see what an icon does when you hover over it.	Frontend	2.0.481	jun. 02, 2023	🔖
overridesDefault for addresses available in PATCH endpoint	The field overridesDefault has been added in PATCH for addresses.	API	1.0.14.598	jun. 01, 2023	🔖
overridesDefault for contacts available in PATCH endpoint	The field overridesDefault has been added in PATCH for contacts.	API	1.0.14.603	jun. 08, 2023	🔖
Added support for the 'Recalculate VAT when the actor changes on the document' setting	The setting 'Recalculate VAT when the actor changes on the document' is now supported. - When the setting is activated, the tax category on the order lines is updated when the customer and/or customer location is changed. - When the setting is deactivated, the tax category on the order lines is not updated when the customer and/or customer location is changed.	API	1.0.14.637	jun. 28, 2023	🔖
Inventory ID no longer case-sensitive	Earlier, using POST with an inventory ID could incorrectly result in a 400 Bad request error, because the inventory ID field was case-sensitive. This has now been fixed, so that the inventory ID field does not differentiate between capital and lower-case letters.	API	1.0.14.638	jun. 30, 2023	🔴

Change shipping address and contact after saving an order	You can now: - Change the shipping address and contact after an order has been saved. - Reset the shipping address and/or contact to the default value of the customer.	Frontend	2.0.547	aug. 02, 2023	
Item set when unique item ID is entered	Earlier, when you entered a full unique item ID in the Find items field and only one item was found, you still had to select the item. This has now been improved so that, when you enter a full unique item ID, you do not need to select the item anymore. You can press Enter and the item will be set on the line directly and you move to the next editable field.	Frontend	2.0.547	aug. 03, 2023	
Selectable order types in UI	Order types used for returns, e.g., RR, CM, and RC, are no longer available for the user. Only order types used for sales are available.	Frontend	2.0.547	aug. 03, 2023	
ProjectID in POST and PATCH	Setting the ProjectID field for an order is now supported in POST and PATCH.	API	1.0.14.645	jul. 03, 2023	
"createdById" and "lastModifiedById" set with API_Client_ID	Earlier, for sales orders created via POST Sales Order Service API, the "createdById" and "lastModifiedById" values were set to "0000-000". This has now been fixed, and the "createdById" and "lastModifiedById" are set with API_Client_ID.	API	1.0.14.648	jul. 04, 2023	
Project ID on order line now set according to Project ID on order	When an order's SOOrder.ProjectId is changed or patched, the new value will be copied to the SOLine.ProjectId field on the order lines.	API	1.0.14.649	jul. 05, 2023	
Support for Mark for purchase order - Swagger correction	We sincerely apologise for making information available in Swagger regarding Mark for Purchase Order support on sales order lines. Support for this functionality has not been finalised and is therefore feature toggled off, and you should now not see the properties [purchaseOrderSource] and [supplierId] in the Swagger documentation.	API	1.0.14.651	jul. 06, 2023	
ProjectTaskID in POST and PATCH	Setting the ProjectTaskID field for an order line is now supported in GET, POST and PATCH.	API	1.0.14.698	aug. 04, 2023	
Support for Mark for purchase order	The Mark for purchase order functionality is now supported in the API. The fields 'purchaseOrderSource', 'supplierId' and 'supplierPrice' have been added in GET, POST and PATCH.	API	1.0.14.702	aug. 10, 2023	
Update salesperson on all order lines	You can now update the salesperson on all existing order lines at once, when you change the salesperson in the overview panel.	Frontend	2.0.556	aug. 09, 2023	
Support for Commissions	The fields and functionalities related to commissions have now been implemented in the UI. The following has been added: - Salesperson in overview panel - Salesperson in order line - Commissionable in order line - Commissions tab with the fields: Salesperson ID, Salesperson name, Commission %, Commissionable amount, Commission amount - Owner In addition, a new functionality has been implemented, which enables you to update the salesperson on all order lines when you change the salesperson in the overview panel.	Frontend	2.0.556	aug. 10, 2023	
Support for order types CS, IN, and QT.	When you create an order, you can now select the order types SO, CS, IN, and QT, and custom order types based on these.	Frontend	2.0.556	aug. 10, 2023	
VAT calculations when adding lines to existing order	Earlier, when adding lines to an order, the VAT amount for existing lines was set to 0. This has now been fixed.	API	1.0.14.708	aug. 17, 2023	
GET/salesorders/{type}/{orderId} totals extended with new totals fields	The fields unbilledAmount, unbilledAmountInBaseCurrency, UnshippedAmount and unshippedAmountInBaseCurrency are now available in GET/salesorders/{type}/{orderId}	API	1.0.14.708	aug. 17, 2023	

Default value for Freight amount	Freight amount is now set to the same value as the Freight cost if the Shipping term has not been defined	API	1.0.14. 708	aug. 17, 2023	
Added support for the 'Recalculate VAT when the actor changes on the document' setting	The setting 'Recalculate VAT when the actor changes on the document' is now supported. - When the setting is activated, the tax category on the order lines is updated when the customer and/or customer location is changed. - When the setting is deactivated, the tax category on the order lines is not updated when the customer and/or customer location is changed.	Frontend	2.0.57 1	aug. 18, 2023	
Default value for Freight amount	Freight amount is now set to the same value as the Freight cost if the Shipping term has not been defined	Frontend	2.0.57 1	aug. 21, 2023	
Commissions tab update after Salesperson change	After you change the salesperson in the overview panel, and you select to update all order lines, the Commissions tab no longer fails to update accordingly.	Frontend	2.0.57 1	aug. 21, 2023	
Commissions tab hidden when functionality is disabled	The Commissions tab no longer appears when the Commissions functionality is disabled in the Enable/disable functionalities (CS100000) window.	Frontend	2.0.57 1	aug. 21, 2023	
Support for External link on order line	The External link column is now available for the order lines.	Frontend	2.0.57 8	aug. 25, 2023	
Support for changing UOM on order line	You can now edit the UOM on the order line. Previously, you could only view the value.	Frontend	2.0.57 8	aug. 31, 2023	
Edit Warehouse on order line	You can now edit the Warehouse column on the order line. Previously, you could only view the value.	Frontend	2.0.57 8	aug. 25, 2023	
Default value for Freight amount	Freight amount is now set to the same value as Freight cost if there are no shipping term settings found.	API	1.0.14. 729	aug. 30, 2023	
Intrastat transaction type set correctly	The Intrastat transaction type is no longer set incorrectly on orders for branches with a different country ID than that of the company.	Frontend	2.0.58 0	sep. 07, 2023	
External link saved	The External link column is no longer cleared when you create an order and click Save.	Frontend	2.0.58 0	sep. 07, 2023	
Added support for Back order status	It is now possible to set an order's status to 'Back order' in PATCH	API	1.0.14. 743	sep. 08, 2023	
Added support for Unshipped quantity	The unshipped quantity for an order is now calculated and available in the Totals tab.	Frontend	2.0.58 6	sep. 08, 2023	
Support for Note on order line	The Note column has now been made available for the order lines.	Frontend	2.0.58 6	sep. 14, 2023	
Added support for Unshipped amount	The unshipped amount for an order is now calculated and available in the Totals tab.	Frontend	2.0.58 6	sep. 08, 2023	
Support for 'Ship on' date on order line	The 'Ship on' column has now been made available for the order lines.	Frontend	2.0.58 6	sep. 14, 2023	

Support for Use replacement cost for margin/profit	The check box 'Use replacement cost for margin/profit' has been added in the order overview panel.	Frontend	2.0.58 6	sep. 13, 2023	
Support for 'Requested on' date on order line	The 'Requested on' column has now been made available for the order lines.	Frontend	2.0.59 8	sep. 22, 2023	
Support for Undership and Overship threshold on order line	The Undership and Overship threshold columns have now been made available for the order lines.	Frontend	2.0.59 8	sep. 22, 2023	
Support for Line type	The Line type column has now been made available for the order lines.	Frontend	2.0.59 8	sep. 21, 2023	
Translation of values in Shipments and Discounts tabs	Earlier, the column 'Type' in the Discounts tab, and the columns 'Shipment type', 'Invoice type' and 'Inventory transaction type' in the Shipments tab, had untranslated values. This has now been fixed.	Frontend	2.0.59 8	sep. 22, 2023	
Support for 'Cost total' on order line	The Extended cost column, now named 'Cost total', has been made available for the order lines.	Frontend	2.0.59 8	sep. 22, 2023	
Support for VAT category on order line	The VAT category column has now been made available for the order lines.	Frontend	2.0.59 8	sep. 19, 2023	
Update 'Requested on' and 'Ship on' on all order lines	In an order with existing lines, when you: - change the 'Requested on' date in the overview panel, which changes the 'Scheduled shipment' date in the Delivery settings tab automatically, or - change only the 'Scheduled shipment' date in the Delivery settings tab, you will now be asked if you want to update the 'Requested on' and 'Ship on' columns on all order lines, or the 'Ship on' column on all order lines, respectively.	Frontend	2.0.61 8	okt. 05, 2023	
Support for Payment method	The Payment method field is now available in the Payment settings tab.	Frontend	2.0.61 8	sep. 27, 2023	
Support for Cash account	The Cash account field is now available in the Payment settings tab.	Frontend	2.0.61 8	sep. 27, 2023	
Support for customer contact	The Contact field is now available in the overview panel.	Frontend	2.0.61 8	sep. 26, 2023	
Support for Shipping rule on order line	The Shipping rule column has now been made available for the order lines.	Frontend	2.0.61 8	okt. 02, 2023	
Update warehouse on all order lines	When you change the Preferred warehouse ID in the Delivery settings tab, you can choose to change the warehouse for all existing order lines as well.	Frontend	2.0.61 8	okt. 03, 2023	
'Use replacement cost for margin /profit' updates Unit cost	The 'Use replacement cost for margin/profit' functionality has been improved. Now, when you have selected this check box, the Unit cost on the line will display the replacement cost, and the Cost total value will be updated accordingly. In the classic version, only the total cost of the order is updated when the replacement cost is used.	Frontend	2.0.61 8	sep. 28, 2023	
Support for Attachment information in GET order and GET order lines	You can now get information about the attachments that have been added to an order or order lines via GET Order and GET order lines.	API	1.0.14. 769	okt. 05, 2023	

Payment reference field available	The Payment reference field is now available in the Payment settings tab.	Frontend	2.0.628	okt. 05, 2023	
Update shipping rule on all order lines	When you change the shipping rule in the Delivery settings tab, you can choose to change the shipping rule for all existing order lines as well.	Frontend	2.0.628	okt. 06, 2023	
Changing Requested on for order with no lines	Earlier, when you changed the Requested on date in the overview panel for an order with no existing lines, the system asked you if you wanted to update the Requested on date on all lines. This has now been fixed, and you will only get this question when the order has existing lines.	Frontend	2.0.628	okt. 06, 2023	
Support for Discount series on order line	The Discount series column has now been made available for the order lines.	Frontend	2.0.628	okt. 05, 2023	
Items list no longer filtered based on previous search	Earlier, when you added an item to a sales order line after filtering the items list, and for the next line opened the items list to add a new item, the items list was filtered according to the previous search. This has now been fixed.	Frontend	2.0.635	okt. 10, 2023	
Create shipment restricted based on order type	For order types that do not require shipment, the Create shipment button is no longer visible.	Frontend	2.0.635	okt. 10, 2023	
ID included for selected customer and location	When you have selected a customer and location in the overview panel, the fields now include their ID as well.	Frontend	2.0.635	okt. 10, 2023	
Support for cancelling an order	You can now cancel an order by changing the status of an order to Cancelled. Note that, when you set an order to Cancelled, you cannot update any more fields.	API	1.0.14.774	okt. 09, 2023	
Line replacement unit cost converted to order currency	Earlier, the line replacement unit cost was not converted to the currency of the order, but the base currency was used instead. This has now been fixed.	API	1.0.14.780	okt. 12, 2023	
Support for Create shipment/receipt	You can now create a shipment for a sales order. Use the Create shipment button.	Frontend	2.0.651	okt. 27, 2023	
Support for Reason code on order line	The Reason code column has now been made available for the order lines.	Frontend	2.0.682	okt. 25, 2023	
Support for Delete order	You can now delete an order in the UI.	Frontend	2.0.682	nov. 01, 2023	
Save button unavailable when no unsaved changes	Earlier, the Save icon was not greyed out after you saved an order. This has now been fixed, and the icon is greyed out when there are no unsaved changes.	Frontend	2.0.682	okt. 25, 2023	
Support for Purchase order source	You can now set the purchase order source on an order line.	Frontend	2.0.682	okt. 25, 2023	
Support for Supplier price	You can now set the supplier price on an order line, when you have set the purchase order source and supplier on the line.	Frontend	2.0.682	nov. 02, 2023	
Support for Supplier on order line	You can now set the supplier on an order line, when you have set the purchase order source.	Frontend	2.0.682	okt. 25, 2023	
Support for sales account on order line	The Account column has now been made available for the order lines.	Frontend	2.0.682	okt. 25, 2023	
Support for Completed in order line	Setting the Completed field in order lines is now supported.	API	1.0.14.796	okt. 20, 2023	

Filter Inventory endpoint with LastModifiedDate	It is now possible to filter the Inventory endpoint with the LastModifiedDateTime value	API	1.0.14.796	okt. 20, 2023	
Support for multi-language	If multi-language is set up in the system, the description of the order line and inventory item is now set according to the language of the customer.	API	1.0.14.824	nov. 03, 2023	
Warning for purchased order line when deleted	When you delete a sales order line, you will now get a warning when a purchase order is connected to it.	Frontend	2.0.691	nov. 03, 2023	
purchaseOrderId field is available in GET/lines and GET /lines/{lineId}	The purchaseOrderId field is now available in GET/lines and GET /lines/{lineId}. This field displays the purchase order number that is linked to the sales order line.	API	1.0.14.826	nov. 07, 2023	
Supplier price now set correctly	When the supplier on an order line differs from the line item's default supplier, the supplier price is no longer set incorrectly.	API	1.0.14.828	nov. 07, 2023	
On hand, Available and Available for shipping quantities displayed for items and warehouses	- In the items list in Find items, you can now view the On hand, Available and Available for shipping quantities for each item. - When you click the Warehouse search icon on a line, you can now view the line item's On hand, Available and Available for shipping quantity for each warehouse.	Frontend	2.0.715	nov. 22, 2023	
Support for setting status to Open	Setting the order status to Open is now supported, for example, when the current status is Cancelled.	API	1.0.14.846	nov. 17, 2023	
Support for Currency and Currency rate fields	In the Financial settings tab, you can now set the currency for the order and view the currency /exchange rate.	Frontend	2.0.727	dec. 01, 2023	
Hide columns and rearrange column order, columns added for replacement cost	With the new Table settings icon in the top right of each table, you can now: - Select which columns should be displayed, - Rearrange the column order. In the Order lines tab, the following columns have been added: - Replacement unit cost, - Replacement cost total.	Frontend	2.0.727	dec. 12, 2023	
Item quantities per warehouse now correct	The item quantity columns, when you click the Warehouse search icon on a line, are no longer incorrect.	Frontend	2.0.727	nov. 30, 2023	
No error when adding non-stock item	You no longer receive an error message when you add a non-stock item.	Interactive-API	1.0.14.869	nov. 30, 2023	
Error 'Currency Id can not be overridden'	You no longer get the error 'Currency Id can not be overridden' and your order is saved correctly.	Frontend	2.0.730	dec. 11, 2023	
Print order document	With the 'Preview document' button in the window footer, you can now preview an order or quote in the corresponding reports, and print it.	Frontend	2.0.742	dec. 21, 2023	
Tax category with tax type Both now accepted	Tax categories with tax type set to Both no longer generate an error message.	API	1.0.14.887	dec. 13, 2023	
Change column width	You can now adjust the column width in tables. On the column you want to adjust, click and drag the right-side border.	Frontend	2.0.755	jan. 04, 2024	

Replacement cost columns now only available for Sales profit viewer	The Replacement unit cost and Replacement cost total columns are no longer available when you do not have the Sales profit viewer role.	Frontend	2.0.764	jan. 16, 2024	🔴
Order type subaccount mask error	When the subaccount mask for an order type is missing subaccount segments, you will no longer get the error 'Defined subaccount mask can't have less characters than segment summary length'. Instead, the missing subaccount segment values will now be retrieved from the item set on the order line.	API	1.0.14.926	jan. 19, 2024	🔴
Financial settings tab available	The Financials settings tab is now supported and available. This tab contains the sections Invoice contact and address and Financial information with their related fields.	Frontend	2.0.767	jan. 29, 2024	💲
Back order status available	You can now set the order status to Back order.	Frontend	2.0.789	feb. 01, 2024	🔖
Set order line as completed	It is now possible to set an order line as completed.	Frontend	2.0.789	feb. 05, 2024	🔖
Order status Cancelled available	It is now possible to set the order status to Cancelled.	Frontend	2.0.789	feb. 01, 2024	🔖
Set order status to Open	You can now set the order status to Open when the original status is Cancelled or Back order.	Frontend	2.0.789	feb. 01, 2024	🔖
Default value for Ship separately	Earlier, in the UI, the default value for 'Ship separately' was incorrect. This has now been fixed.	Frontend	2.0.789	jan. 31, 2024	🔴
Support for interactive API	Using Sales order v3 with interactive API authentication is now supported.	API	1.0.14.936	feb. 02, 2024	🔖
Emailed included in GET /SalesOrder	Emailed fields have now been added to GET/SalesOrder.	API	1.0.14.938	feb. 06, 2024	✅
Date fields no longer set incorrectly for order	For order types for which a shipment can be created, the fields Invoice date, Due date, Cash discount date and Post period are no longer set.	Frontend	2.0.818	feb. 08, 2024	🔴
Create shipment for partially shipped lines	You can now click the Create shipment button when a partial shipment has been made for all lines.	Frontend	2.0.818	feb. 12, 2024	🔴
Support for Quantity on hand and available, and link to incoming and outgoing quantities	For order lines, the following columns have been added: - Quantity on hand - Quantity available - Quantity details The Quantity details column contains a link to the Inventory allocation details (IN402000) window, where you can view the incoming and outgoing quantities for the line item and warehouse.	Frontend	2.0.818	feb. 22, 2024	⚡
503 Service unavailable error fixed	Earlier, in some scenarios related to having specific discounts, you received the error "503 Service unavailable". This has now been fixed.	API	1.0.14.948	feb. 15, 2024	🔴
ModifiedSince in GET/Inventory now works correctly	In GET/Inventory, when you filter based on ModifiedSince, the filtering now works correctly. In addition, the ModifiedSince now filters on the warehouse level, instead of on the warehouse location level.	API	1.0.14.949	feb. 16, 2024	🔴

Change status BackOrder to Hold	You can now change an order's status from BackOrder to Hold.	API	1.0.14.950	feb. 19, 2024	🟥
Support for projects	You can now set the Project field for an order in the top part, and the project task for each order line in the Project task column.	Frontend	2.0.824	mar. 15, 2024	⚡
Support for Email document	You can now click Email document under Actions and initiate the process of sending the order as an email.	Frontend	2.0.824	mar. 22, 2024	⚡
modifiedSince in Inventory endpoint now includes all locations	Earlier, when using the Inventory endpoint expanded with location and modifiedSince, not all locations would be included. This has now been fixed, and modifiedSince is filtered on the warehouse level and includes all locations of the warehouse.	API	1.0.14.955	feb. 26, 2024	🟥
PATCH for order and order line note	You can now update (PATCH) an order's notes and line notes, for all order statuses.	API	1.0.14.956, 1.0.14.975	mar. 07, 2024	🟥
Warehouse location for return order lines	For return orders, the warehouse location on the order line is now set correctly.	API	1.0.14.969	mar. 05, 2024	🟥
Tax zone retrieved from company or branch	For orders for a customer location with no tax zone set, the default tax zone will now be retrieved from the company or branch.	API	1.0.14.971	mar. 05, 2024	🟥
Correct default Purchase order source for order line	When an item has a specified replenishment source, the default Purchase order source for the order line is now set correctly.	API	1.0.14.978, 1.0.14.979	mar. 08, 2024	🟥
"isRotRutDeductible" added to GET	"isRotRutDeductible" is added to GET/api/v3/SalesOrders/{type}/{orderId} BREAKING CHANGE: This will replace the current "isRotRutDeductable" field. The field "isRotRutDeductable" will be removed after 30th of June 2024.	API	1.1.0.983	mar. 12, 2024	🟥
"apartment" added to GET	"apartment" is added to GET/api/v3/SalesOrders/{type}/{orderId}/rotrut BREAKING CHANGE: This will replace the current "appartment" field. The field "appartment" will be removed after 30th of June 2024.	API	1.1.0.986	mar. 13, 2024	🟥
Cost for kits correctly set	For kits, when the kit cost is based on components and the kit components have different UoMs, the cost on the order line is no longer incorrect.	API	1.1.0.994	mar. 19, 2024	🟥

206 opgaver

NeXtGen Process Payment Service (P2P)

Release note title	Release Notes.	Komponent(er)	Ret version(er)	Løst	T
Payment requests remaining stuck in the In progress status	Payment requests remaining stuck in the In progress status	Outgoing Payments (P2P)	1.0.0.161-Lambda	mar. 22, 2024	🟥

	Column "Supplier name" displayed only after reset to defaults	Outgoing Payments (P2P)	20.22.0.4607-UI, 1.0.0.223	feb. 13, 2024	🟧
	New view available in Table settings: Supplier overview	Outgoing Payments (P2P)		feb. 26, 2024	🟧
Errors when using option Preview and edit document	Errors when using option Preview and edit document	Outgoing Payments (P2P)		jan. 30, 2024	🟧
Error "Number of cash accounts to be paid coming from the request is not same as the one in database"	Error "Number of cash accounts to be paid coming from the request is not same as the one in database"	Outgoing Payments (P2P)	20.22.0.4533-UI, 1.0.0.214	jan. 30, 2024	🟧
Payment list view in Payment Status tab shows document reference directly in the first details section	You are now able to check the document reference that matches each payment directly in the first details section in Payment Status. The second level of details has been removed from this view.	Outgoing Payments (P2P)	20.22.0.4818-UI	mar. 15, 2024	🟩
Display option settings reset to default	Display option settings reset to default	Outgoing Payments (P2P)		jan. 09, 2024	🟧
	Display error in Process payments in a company	Outgoing Payments (P2P)	20.22.0.4521-UI, 1.0.0.210	jan. 29, 2024	🟧
Export to Excel button not working	Export to Excel button not working	Outgoing Payments (P2P)	20.22.0.4423-UI, 1.0.0.209	jan. 04, 2024	🟧
The "Resend and close" button not working	The "Resend and close" button not working	Outgoing Payments (P2P)	20.22.0.4409-UI, 1.0.0.205, 1.0.0.207	jan. 03, 2024	🟧
Missing the LB downloading	Missing the LB downloading	Outgoing Payments (P2P)	20.22.0.4387-UI, 1.0.0.203	dec. 19, 2023	🟧
Server down received in Process payments window	Server down received in Process payments window	Outgoing Payments (P2P)	20.22.0.4356-UI	dec. 15, 2023	🟧
New labels in Table settings	New labels in Table settings	Outgoing Payments (P2P)	20.22.0.4409-UI, 1.0.0.205, 1.0.0.207	jan. 03, 2024	🟩
Duplicate requests and payments created in Process payments	Duplicate requests and payments created in Process payments	Outgoing Payments (P2P)	1.0.1.3218-API, 1.0.0.200	dec. 18, 2023	🟥
	Toggle to filter the payments not correctly processed	Outgoing Payments (P2P)		feb. 09, 2024	🟩
Pay separately not remembered when navigating away from Prepare payments tab	When selecting or deselecting the Pay separately button and switching from and back to the Prepare payments tab, the setting was not remembered. This has now been fixed.	Outgoing Payments (P2P)		dec. 04, 2023	🟧
Supplier name missing in payment batch	Supplier name missing in payment batch	Outgoing Payments (P2P)	1.0.0.161-Lambda	dec. 14, 2023	🟧
		Outgoing Payments (P2P)		nov. 20, 2023	🟧

Server down message in Process payments window	Server down message in Process payments window	Outgoing Payments (P2P)	20.22.0.43 56-UI, 1.0.0.199	dec. 14, 2023	🟧
	Deviation message implemented in Process payments window	Outgoing Payments (P2P)	20.22.0.45 21-UI, 1.0.0.210	jan. 29, 2024	🟩
		Outgoing Payments (P2P)		nov. 20, 2023	🟧
Wrong amount displayed on a row level against the documents	Wrong amount displayed on a row level against the documents	Outgoing Payments (P2P)		okt. 23, 2023	🟧
Payment status incorrectly reflected in Payment status tab when manually handled in Supplier payments window	Payment status incorrectly reflected in Payment Status tab when manually handled in Supplier payments window (AP302000)	Outgoing Payments (P2P)	1.0.1.3207 -API, 1.0.0.198	dec. 14, 2023	🟩
	New status for payments stuck in printed status	Outgoing Payments (P2P)		feb. 09, 2024	🟩
Download LB file button not working.	The Download LB file button was not responding. This has now been fixed.	Outgoing Payments (P2P)		okt. 06, 2023	🟧
	Using checkmarks inside filters is not properly working	Outgoing Payments (P2P)	20.22.0.41 50-UI, 1.0.0.191	nov. 01, 2023	🟧
	Batch payments functionality is available in Process payments	Outgoing Payments (P2P)	20.22.0.41 04-UI	okt. 13, 2023	🟩
	Export to Excel button not working	Outgoing Payments (P2P)	20.22.0.40 64-UI	okt. 05, 2023	🟧
The recorded financial periods outside the recorded payment dates	The recorded financial periods outside the recorded payment dates	Outgoing Payments (P2P)	1.0.1.1034 -Lambda	sep. 19, 2023	🟧
Table settings not saved in user configuration	Table settings not saved in user configuration	Outgoing Payments (P2P)	20.22.0.37 83-UI	aug. 31, 2023	🟧
	Cash account search enabled in Payment status tab - details section.	Outgoing Payments (P2P)		jan. 30, 2024	🟩
Resize and move columns in Payment status details	Payment status details functionality	Outgoing Payments (P2P)	20.22.0.37 83-UI	aug. 31, 2023	🟩
Description for payment missing on payments containing multiple documents	When a payment contained multiple documents, the description for the payment was missing. This has now been fixed, and a text "Payment for XXXXX" was added. For a payment type credit note, the description will be the one from the credit note document type.	Outgoing Payments (P2P)	1.0.0.161- Lambda	mar. 15, 2024	🟩
	Deselect deviations	Outgoing Payments (P2P)	20.22.0.35 36-UI	jun. 26, 2023	🟧
	Overview of how many documents are selected out of the total number of documents	Outgoing Payments (P2P)		jun. 26, 2023	☑️

	Process invoices and credit notes automatically when the amount to pay is 0 in Process payments (AP50301S)	Outgoing Payments (P2P)	1.0.1.1010 -Lambda	jun. 22, 2023	🔴
	Amount to pay for supplier	Outgoing Payments (P2P)	20.22.0.35 49-UI	jun. 29, 2023	🔴
Amount to pay on supplier is not updating	When the "Group documents from the same supplier" view is active and you manually update the amount to pay for a document, the summary amount is no longer updating. This has now been fixed.	Outgoing Payments (P2P)	20.22.0.34 95-UI	jun. 14, 2023	🔴
	Time out in the sidebar and To be paid amout	Outgoing Payments (P2P)	20.22.0.35 03-UI	jun. 20, 2023	🔴
	Filters and refresh on the Status tab	Outgoing Payments (P2P)	20.22.0.34 63-UI	jun. 07, 2023	🔴
	When a batch / payment is created or an invoice is modified in Process Payments screen, a notification is generated in the Send notifications window	Outgoing Payments (P2P)		jun. 08, 2023	✅
	Fix deviation messages in View only deviations	Outgoing Payments (P2P)	20.22.0.34 95-UI	jun. 14, 2023	🔴
	Notification Center emails	Outgoing Payments (P2P)		maj 16, 2023	🔖
Drag and drop columns to move them		Outgoing Payments (P2P)	20.22.0.33 65-UI	maj 16, 2023	🔖
Customisable table header in Status tab - detail view	Customisable table header in Status tab - detail view	Outgoing Payments (P2P)	20.22.0.36 47-UI	aug. 31, 2023	🔖
New features available for Batch payment functionality within the Process payments window	New features available for Batch payment functionality within the Process payments window	Outgoing Payments (P2P)	1.0.1.3218 -API, 1.0.0.200	dec. 14, 2023	🔖
	Cash account filter not considering inactive cash accounts	Outgoing Payments (P2P)	1.0.1.1004 -Lambda	maj 25, 2023	🔖
When a batch / payment is created or an invoice is modified a notification is generated in the Send notifications window	When a batch / payment is created or an invoice is modified a notification is generated in the Send notifications window	Outgoing Payments (P2P)	1.0.1.1004 -Lambda	maj 25, 2023	🔖
	New view in Process payments screen	Outgoing Payments (P2P)	20.22.0.33 71-UI	maj 18, 2023	🔖
	Cash account in sidebar when changed from overlay edit	Outgoing Payments (P2P)	20.22.0.31 59-UI	mar. 16, 2023	🔴
	Side bar timeout when using an inactive cash account to pay a document	Outgoing Payments (P2P)	20.22.0.32 67-UI	apr. 20, 2023	🔴
	Page number changes when closing invoice preview	Outgoing Payments (P2P)		mar. 09, 2023	🔴
	Release a payment when credit note + invoice amount = 0 in Process payments (AP50301S)	Outgoing Payments (P2P)	1.0.1.996- Lambda	maj 25, 2023	🔖

New column "Branch" on Status tab and details section	Outgoing Payments (P2P)		apr. 20, 2023	🔖
New payment request status "Partially sent to AutoPay"	Outgoing Payments (P2P)		mar. 17, 2023	🔖
New error message after confirming payment and when number series went out of numbers	Outgoing Payments (P2P)		feb. 24, 2023	🔖
Infinite number of tabs if the application is left open overnight	Outgoing Payments (P2P)		mar. 09, 2023	🟧
Email user language not supported for Notifications in Visma.net ERP Payment Service	Outgoing Payments (P2P)		feb. 27, 2023	🔖
Implement date filter "from - to" on Status tab	Outgoing Payments (P2P)	20.22.0.30 62-UI	mar. 09, 2023	🔖
Amount on Status tab not available	Outgoing Payments (P2P)		feb. 24, 2023	🟧
GIRO payments for Danish companies	Outgoing Payments (P2P)		feb. 07, 2023	🟧
Pop-up message to announce about the Notifications feature	Outgoing Payments (P2P)	20.22.0.30 62-UI	mar. 09, 2023	🔖
Digit grouping symbols is not working properly	Outgoing Payments (P2P)	20.22.0.29 27-UI		🟧
Link to the monolith window for Invoices window and Suppliers window			jan. 19, 2023	☑️
Changing priority not working if the language considered is different from English		20.22.0.26 31-UI	dec. 20, 2022	☑️
Invoice is selected when using invoice preview			jan. 19, 2023	🔖
Supplier number column not sortable in individual documents view	Outgoing Payments (P2P)	20.22.0.26 31-UI	dec. 20, 2022	🟧
Summary of amounts to pay per supplier	Outgoing Payments (P2P)	20.22.0.32 67-UI	apr. 20, 2023	🔖
All document types are now supported	Outgoing Payments (P2P)	20.22.0.30 62-UI	mar. 09, 2023	🔖
Editing Notes field available in Overlay edit mode	Outgoing Payments (P2P)		feb. 24, 2023	🔖
Active cash accounts on top of the list in the sidebar and the inactive in the bottom	Outgoing Payments (P2P)		jul. 20, 2023	🔖

	Bulk change for the cash account	Outgoing Payments (P2P)		apr. 20, 2023
	New filters added to Prepare payments	Outgoing Payments (P2P)		jan. 30, 2023
Update document and see invoice image at the same time	Now it is possible to update the document and see the invoice image at the same time			dec. 22, 2022
	New payment request statuses	Outgoing Payments (P2P)		feb. 26, 2024
	New sortable columns : Amount to pay, Document amount (orig. currency) and Supplier ref.	Outgoing Payments (P2P)		mar. 09, 2023
	Undo option not properly working when setting the amount to pay set to a higher value	Outgoing Payments (P2P)		jan. 19, 2023
	Undo option not properly working when setting amount to pay set to 0			jan. 19, 2023
Cash discount settings moved				
Not able to send payments to AutoPay due to company conflict		Outgoing Payments (P2P)		okt. 21, 2022
	Processing payments on Safari/Apple not working	Outgoing Payments (P2P)	20.22.0.29 27-UI	feb. 07, 2023
Cash account amout fetched from Account details window		Outgoing Payments (P2P)	1.0.1.2357 -API	nov. 22, 2022
Notes introduced in new payment service			20.22.0.24 67-UI	
Cash discount settings moved to Supplier ledger preferences				
Change of filter for payment date		Outgoing Payments (P2P)	20.22.0.24 15-UI	
Document reference number with a dot not showing in the payment service		Outgoing Payments (P2P)	1.0.1.2226 -API	sep. 30, 2022
Payment to an employee not opening the employee window through Supplier link		Outgoing Payments (P2P)	20.22.0.22 98-UI	okt. 05, 2022
User restricted from using certain cash accounts will not see the accounts in Scheduler's Cash account column		Outgoing Payments (P2P)	20.22.0.23 47-UI	
Schedule payment message above "Confirm payout" button			20.22.0.25 50-UI	
View only deviations toggle has been removed from the Filters section	The View only deviations toggle has been removed from the Filters section, you can now access all deviations directly from the Prepare payments tab.		20.22.0.25 97-UI	dec. 27, 2022

Moving the deviation warning message			20.22.0.24 67-UI		🔖
Table options and Column configurator combined to Table settings					🔖
Manual LB routine activated for Swedish customers			1.0.1.2246 -API	okt. 06, 2022	🔖
	Create one scheduler payment for all branches	Outgoing Payments (P2P)	20.22.0.30 26-UI	feb. 24, 2023	🔖
New global action button			20.22.0.25 50-UI		✅
Authentication with and without third party cookies		Outgoing Payments (P2P)	20.22.0.22 52-UI	sep. 27, 2022	🟥
New sorting in column configurator		Outgoing Payments (P2P)		nov. 22, 2022	✅
Missing or mismatch of tenant IDs between ODP and Visma.Connect		Outgoing Payments (P2P)		sep. 28, 2022	🟥
	Frontend Authentication - Support JWT refresh tokens	Outgoing Payments (P2P)	20.22.0.45 21-UI, 1.0.0.210	jan. 29, 2024	🔖
Confirm deletion of a schedule					✅
	New error message after confirming payment and when no number series are defined	Outgoing Payments (P2P)		feb. 24, 2023	🟥
	Display invoices with pay date in period not generated or inactive		20.22.0.27 39-UI	jan. 19, 2023	🔖
Documents with their pay date in financial period not generated or inactive now showing		Outgoing Payments (P2P)	1.0.1.828- Lambda	jul. 13, 2022	🟥
Payment method added as a column to Process payments					✅
	Payment and deviation notification	Outgoing Payments (P2P)		feb. 20, 2023	⚡
Branch column available in Process payments window				jun. 07, 2022	✅
Document currency column sortable			20.22.0.16 77-UI, 1.0.0.69	maj 24, 2022	✅
Document currency column sortable		Outgoing Payments (P2P)		maj 25, 2022	✅
Payment date for invoice and credit note with different payment date		Outgoing Payments (P2P)	1.0.1.746- Lambda, 1.0.0.70	maj 20, 2022	🟥
Confirm payout redirecting to Status tab					✅

Payment options available for Payment viewer role		Outgoing Payments (P2P)	20.22.0.16 63-UI, 1.0.0.67	maj 19, 2022	🔴
AutoPay button in Process payments window		Outgoing Payments (P2P)	20.22.0.17 05-UI, 1.0.0.70	maj 25, 2022	☑️
Export to Excel for Credit note document type		Outgoing Payments (P2P)	1.0.1.739-Lambda, 1.0.0.67	maj 18, 2022	🔴
Attachments for paid invoices available in AutoPay.		Outgoing Payments (P2P)	1.0.1.1780 -API, 1.0.0.71	jun. 07, 2022	🔖
		Outgoing Payments (P2P)		maj 17, 2022	🔴
Export to Excel for Credit note document type		Outgoing Payments (P2P)	1.0.1.739-Lambda, 1.0.0.67	maj 09, 2022	🔴
				maj 10, 2022	🔴
Charge bearer for credit notes		Outgoing Payments (P2P)	1.0.1.1726 -API, 1.0.0.67	maj 12, 2022	🔴
	Create one payment file per payment date	Outgoing Payments (P2P)	1.0.1.907-Lambda	dec. 22, 2022	🔖
Sort supplier name alphabetically			20.22.0.17 05-UI, 1.0.0.70	maj 26, 2022	💲
Scrolling to the right continues to show columns to the left	Scrolling to the right continues to show columns to the left	Outgoing Payments (P2P)		nov. 23, 2023	☑️
Pay all selected invoices with today's date		Outgoing Payments (P2P)		jun. 23, 2022	🔖
Enter missing bank account in pop-up window with account details		Outgoing Payments (P2P)		maj 25, 2022	☑️
Line editing wrongfully allowed for Payment viewer role		Vue.js UI Library (P2P)		maj 25, 2022	🔴

124 opgaver

API - Due dates for breaking changes

Release Notes.	Documentation	Deadline
Default expand toggle values in GET KitAssembly endpoint to be set to FALSE instead of TRUE	Expand toggle values that are currently set to TRUE by default will be changed to FALSE by default.	maj 01, 2024
Planned removal of VNI authentication method	We are extending the deadline for phasing out VNI authentication method from December 31st 2023 til latest June 1st 2024. ISVs should register their (existing) integrations in the Developer Portal and use Connect authentication instead before the stated end date. Benefits of this change: - One preferred method of authentication across Visma.net ERP portfolio - Better security using scopes - Let customer be more in control (customer grants access explicitly) More information for ISVs on how to migrate existing integrations and\or setup new integrations can be found in the international developer community: https://community.visma.com/t5/News-in-Developers-Visma-net/Visma-net-ERP-APIs-are-now-available-for-Visma-Connect/ba-p/542148	jun. 01, 2024
Planned removal of Sales Order API endpoints	We plan to be functionally complete by Q3-2024 (30th of September 2024), thus new due date being end of Q4-2024(31st of December 2024). If any change would occur for this, we will announce that as soon as possible, A number of Sales Order API endpoints will be removed as a part of the transition to the next generation ERP. The following API endpoints will be removed: GET /controller/api/v1/salesorder/{orderNbr} GET /controller/api/v1/salesorder/{orderType}/{orderNbr} GET /controller/api/v1/salesorder/{orderType}/{orderNbr}/rotrut GET /controller/api/v1/salesorder GET /controller/api/v1/salesorder/{orderType}/{orderNbr}/commissions POST /controller/api/v1/salesorder POST /controller/api/v1/salesorder/{saleOrderNumber}/action/cancelSalesOrder POST /controller/api/v1/salesorder/{salesOrderNumber}/action/reopenSalesOrder PUT /controller/api/v1/salesorder/{orderNbr} GET /controller/api/v1/salesorderbasic/{orderNbr} GET /controller/api/v1/salesorderbasic/{orderType}/{orderNbr} GET /controller/api/v1/salesorderbasic POST /controller/api/v1/salesorderbasic PUT /controller/api/v1/salesorderbasic/{orderNbr} POST /controller/api/v2/salesorderbasic POST /controller/api/v2/salesorder POST /controller/api/v2/salesorder/{saleOrderNumber}/action/cancelSalesOrder POST /controller/api/v2/salesorder/{salesOrderNumber}/action/reopenSalesOrder All functionality currently missing in the new Sales Order Service API will be added before these endpoints are removed. The list of affected endpoints will also be extended, so pay attention to future updates. For more information on how to use the Visma.net ERP Sales Order Service, please visit: https://community.visma.com/t5/News-in-Developers-Visma-net/Getting-started-with-the-first-neXtGen-service-Visma-net-ERP/ba-p/401436 Swagger for Visma.net.ERP.SalesOrder.API https://salesorder.visma.net/swagger/index.html	dec. 31, 2024

3 opgaver