



Visma ERP POS



**News and Improvements 11.00.0**

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# **Notice**

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Visma ERP POS 11.00.0

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# Introduction

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The *News and Improvements* include information about new and changed features, fixed issues and known issues and limitations in the latest version of Visma ERP POS.

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.

It is especially important that you read the *Installation guide* before you upgrade.

## Visma application compatibility

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When you are installing multiple Visma products you must make sure they are compatible.

### Visma Business product line compatibility

Visma Business, Visma Reporting, Visma Document Center, Visma ERP POS and Visma User Directory are all a part of the Visma Business product line. Within the product line all products with the same major version number are compatible.

The version numbers for all products in the product line consists of major, minor and patch number separated by periods.

When installing more than one of the products in the product line the major version of the products must be the same. However the minor version and the patch numbers may vary.

I.e. Visma Business 9.01.0 will work together with Visma Document Center 9.00.0, but the compatibility of Visma Business 9.01.0 and Visma Document Center 8.00.0 is not supported.

### Other Visma applications compatibility

When you install Visma ERP POS version 10.12.0 you must upgrade your other Visma products to the following versions or later.

Application	Version	Comment
Visma Business	5.30	
Visma Global	7.70	
Visma Contracting	5.12	

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# Chapter

# 1

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## **Visma ERP POS 11.00.0**

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**Topics:**

- *New features*
- *Improvements*

In version 11.00.0 of Visma ERP POS we are focusing on overall increased performance of the POS client.

These are some of the key improvements: the customers are indexed, the roles can have specific payment methods assigned, the server installation is streamlined and products that are deleted in the host ERP are handled better.

## New features

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New features introduced in this version.

## Improvements

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Improvements made in this version.

### Sales

#### **Implement indexing solution for ERP customers**

Up to version 11.00.0, the customers are loaded into POS client memory when starting. Customers are now indexed like products. This means that the memory is free and the customer search is faster.

#### **Add payment related permissions for different roles**

The roles have configurable access to the different payment methods.

#### **Add option to display sales reports without VAT**

The sales report displayed per transaction can now be shown without VAT.

#### **Store logo preview in Store Settings is the same for all stores**

The store logo preview matches the stored file.

#### **Email server details preview not refreshed in multiple store configuration**

The email server details preview now matches the stored data.

### ERP integration

#### **Investigate and implement "reverse synchronization" with the host ERP**

Products, barcodes and prices that are deleted in the host ERP are now removed automatically from POS. The cleanup mechanism must be setup to run each day at a specific hour.

#### **Display ERP primary keys next to description for specific values**

The primary keys are displayed next to the name or description inside the settings area.

#### **Improve handling of memo files in all ERPs**

The memo column size is increased to 4000 inside the database. If the memo exceeds this size, then the synchronization mechanism will truncate it and store only the first 4000 characters. Up the version 11 the synchronization would stop if a large memo file was encountered.

### Technical

#### **Server installer - upgrade process improvements**

The server installation process detects the installed components and auto selects the components to be upgraded.

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# Chapter

# 2

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## Known issues, limitations & restrictions

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This list covers some of the known problems with this version, which will be resolved in future releases, as well as recommendations when using Visma ERP POS.

### Installation

- POS Server components should be installed first and only then the POS client.
- Microsoft POS for .Net 1.12 must be installed using **Complete** as type of installation.
- We recommend that the Visma ERP POS client should be installed only on 32 bit machines. There are not many 64 bit device drivers on the market and so the support for these operating systems is limited.
- In some cases, the SQL Server Compact installation on 64 bit machines is incomplete. The solution is to install first the 32 bit version and then reinstall the 64 bit version.

### ERP integration

- The **Invoice payment voucher number series** and **Miscellaneous payment voucher number series** from **Store settings** must be chosen so that no conflicts exist inside the host ERP. For example, if the same series is used for both **Miscellaneous payment voucher number series** in Visma ERP POS and Cash Invoice Series in the host ERP, the cash invoice number series will be interrupted by the vouchers created by Visma ERP POS. Visma ERP POS displays only the not suspended voucher number series from the host ERP inside **Store settings**. If the user selects a series in Visma ERP POS and later suspends it in the ERP, he must change that series in Visma ERP POS.

### Functionality

- All changes in **Settings** become visible after a logout/login.
- If during a refund the bankcard payment does not work properly because of a control unit error and the reversal of the refund fails, Visma ERP POS will assume that the cashier has given to the customer the corresponding amount in cash. An activity report event for Cash Payment Received is recorded and a voucher is posted in the host ERP connecting the two payment method accounts.
- A gift card that is reported lost or stolen can be used for the purchase of a new gift card of the same value, without having to cancel the first card.

- The client logs can be found by accessing the shortcut from the Visma ERP POS group. The local database and products index folder are located one level higher.
- Do not attempt to restore the local database to an older version. If any issues are detected, the only way to delete the local database is through the option from **POS terminal settings**, never manually.