Release notes

Visma.net
ERP

Version 8.19

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Notice

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Introduction

The News and improvements section 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.

New features in Finance

General ledger

Account description in journal reconciliation preferences

Journal reconciliation preference (GL30200S)

There is a new column Account description in the grid, in search, and in the column configuration to get a better overview of the accounts that are used.

Journal reconciliations in list view

Journal reconciliation (GL30201S)

The Journal reconciliation window now opens in the list view (GL3020PL) showing all reconciliations. From there you can open existing reconciliations or create ones.

Journal reconciliation preferences in list view

Journal reconciliation preference (GL30200S)

The Journal reconciliation preference window now opens in the list view showing all reconciliations. From there you can open existing reconciliations or create ones.

Period values disappear from account details

Account details (GL404000)

When opening the Account details window after selecting an account, the From period and To period fields were blanked out.

Improvements in SIE export

SIE export (GL40100S)

You are now able to select any beginning period for SIE export (SIE type 4) and not only the beginning period of each year.

Changes in SIE export to meet regulations

SIE export (GL40100S)

Now, vouchers with a transaction date in another period than the posting period get the last day of the posting period as their date in SIE export (SIE type 4) files.

There is a new setting on the Voucher number series tab called Put period and transaction date in front of voucher text for setting this information for the transactions in the SIE file.

Supplier ledger

Move all records to specified period

Prepare for closing (AP50700S)

There is a new button Move all to period that moves all, or all selected records to the specified period.

You can use it for scheduling of the process.

Change VAT category on a split purchase invoice line

Purchase invoices (AP301000)

You can now change VAT category on a split purchase invoice line. When searching in the VAT category, you can only select the category connected to the same VAT % as the parent line.

Search suppliers on corporate ID

Suppliers (AP303000)

In the Suppliers and Customers windows, in the Search field, you are now able to search on corporate ID to avoid adding duplicate suppliers/customers.

Line level Invoice Inbox rules

Suppliers (AP303000)/ Invoice Inbox rules (AP206000)

When the supplier has the setting Create invoice with one line for each VAT rate or Import header amounts by VAT code selected, the line level Invoice Inbox rules will not apply.

A warning message is shown when such a supplier is selected in the Invoice Inbox rules: "This supplier has the setting (the accurate setting name) selected and it is incompatible with the line level Invoice Inbox rules.

Last payment and batch date

Supplier details (AP402000)

There are now two new columns in the Supplier details window:

- Last payment date - the date for the last entered payment.
- Last batch payment - the ID for the last batch payment document with link to it.

Payment methods in payment processing

Process payments (AP50300S)

Now, only the payment methods are visible in Process payments window, which have the setting Create batch payment selected on the Settings for supplier ledger tab.

Customer ledger

View dunning letter

Sales invoices (AR301000)

On dunning letter fee invoices, there is a new button named View dunning letter on the top part of the window. It opens the Dunning letter (AR306000) window with the details of the dunning letter from which the fee is generated. You also can print the dunning letter.

On the dunning letter fee invoice there is the dunning letter number so that the customer knows for which dunning letter this fee is generated.

Price class on customer class

Customer classes (AR209000)

To ensure that the customers in a specific customer class get the correct price class, there is option Price class ID in the Customer classes window. You can use it to set a price class for all the customers in the customer class instead of one customer at a time.

Drag and drop invoice lines

Sales invoices (AR301000)

On the Document details tab, you are now able to change the invoice rows by dragging and dropping them.

Invoice amount for currencies

Write-off balance and credits (AR505000)

The invoice amount has now been added for foreign currency and base currency in the Write-off balance and credits window.

Sales by item and customer

Sales by item and customer (AR40103S)

There is a new inquiry Sales by item and customer in the Inquiries drop-down in the Customers window. It shows the customer invoice with its item details.

Payment method settings

Customer ledger preferences (AR301000)

On the General settings tab in the Payment settings section, there are the following new options:

- Automatic payment method: This value will automatically be set when you open the Process customer refunds (AR50300S) window.
- Manual payment method: This value will automatically be set when you open the Manual payments (AR50850S) window.
- Direct debit payment method: This value will automatically be set when you open the Send direct debit invoices (AR50850S) window.

The cash account set in these window will be the cash account with check mark for customer ledger default on the payment method.

In the Process customer refunds (AR50300S) window, you will only see the payment method that has the Use in customer ledger and Create batch payment options selected.

In the Manual payments window, you will only see the payment method that has the Use in customer ledger and Print payments or Not required options selected.

Deferred revenue

New columns for finding documents

Run recognition (DR501000)

There are now two new columns in the Run recognition window:

- Business account
- Reference number

The columns are for both revenue and expense. They will help you to find your documents more easily.

Cash management

Override payment method on bank processing

Cash management preferences (CA101000)

There is a new field named Override payment method in the bank processing, which you use for selecting a payment method. If this is selected and connected to the cash account used in the Process bank transactions window, this payment method will be used as the payment method when creating a payment or rule for Supplier ledger or Customer ledger (replacing the default supplier/customer payment method).

Change in direct debit settings

Payment methods (CA204000)

You have now the possibility to select option Pay all invoices in same batch in the Direct debit settings section for each payment method. If both FIRST and RCUR are selected, mandates will be created in same payment batch.

Customer order available in processing of bank transactions

Process bank transactions (CA306000)

You can now see the customer order from the sales invoice on the Create payment tab with the Customer ledger workspace selected. It is also available in the reference number search in the table part on the right.

Entry type ID and offset account override

Process bank transactions (CA306000)

On the Create payment tab, when the Cash management workspace is selected, you will see the connected default account on the different entry types under the Entry type ID. If another account is set on the cash account in the Offset account override, this particular account will be displayed.

New fields in processing of bank transactions

Process bank transactions (CA306000)

In creation of customer ledger payments, the fields for Customer ID and Customer name are now available. When you create an invoice for a child company, you will see the name of the customer when a parent-child customer is set.

VAT

Changes in the import of SAF-T report

SAF-T report (TX50600S)

The export of SAF-T file to file and Altinn has been changed and it now uses the file version 1.10.

Changes in this version are the following:

- An empty postcode and city are allowed on suppliers and customers. The error given in the window has been changed to a warning and we allow you to send a file with an empty postcode and city.
- The reference ID in the line segment of the transactions that contained a customer or supplier number is now exported only on the transactions for the customer ledger and supplier ledger accounts (1500/2400)
- On some general ledger transactions, the VAT category and VAT number were exported and calculated the taxable amount even if the batch did not contain any taxable amounts. This has been changed and only the batches where the check box for Calculate VAT is selected will contain VAT information.
- The tags GroupingCategory and GroupingCode that contained an account class and type are not removed because their usage has been changed and our output is not valid.
- The standard VAT code has been updated and the code 23 deleted and replaced with code 20. If the code 23 has been used, this code must be updated with the standard VAT code 20. The update will set this value.
- The VAT category 23 is updated with the standard VAT code 20 on existing companies. For companies created in version 8.19 or later, this code does not exist. A new VAT category 20 is added to replace the VAT category 23. For old companies, this will be added during upgrade if the VAT ID 11G exists. The Item classes 4 and 7 are updated with the new code during upgrade but if changes have been made, this update might not be done and you should check that these codes start using the new code 20 for import and EU import and not 23. If you have created other item classes using the VAT category 23, they should also be updated. The old code will work as well.
- Subaccount segments with empty values will not be exported.

Contract management

Renewal point of contracts

Customer contracts (CT301000)/Contract templates (CT202000)

Earlier, you were not able to enter a higher value than 365 days (1 year) in the Renewal point field for days before expiration in the Contract module.

Now the accepted maximum value in the field is 3650 days (10 years).

Add customer order reference on customer contract

Customer contracts (CT301000)

There is a new field called Customer order on the Summary tab (reference info to invoice receiver).

The value from this field is transferred to the sales invoice in Sales invoices (AR301000) window to the Customer order field. The field and its value are printable onto invoice reports. The value exists in EDI XML.

Payment method, branch and mandate on contracts

Customer contracts (CT301000)

You can now select a payment method, branch, and mandate on contracts, which will be used when invoicing.

Other

Start page updated

The start page in Visma.net ERP has been updated and changed to a dashboard showing content from the community.

Notify about system and user events

There is a new feature you can use to set up and activate notifications about changes or actions within your system. The feature is meant for administrators of the system. You can:

- Initiate system set notifications to be received by selected or all users.
- Configure your own notifications and also set them to be received by other users.

The notifications will be displayed in the Notifications panel.

HTML view in the Notification templates window

Notification templates (SM204003)

The HTML view in the Notification templates window has now been restored. HTML tags and attributes like style, colour, font, size, borders, href, img, and table are available again.

Webhooks in general ledger accounts

Webhbooks have been implemented for accounts and the actions create, delete, and update will trigger a notification. For more information, we have updated the online help documentation.

Secure file transfer via SFTP

Visma.net ERP now supports secure file transfer via SFTP. You can configure it on the Synchronisation tab under file maintenance.

Logo from branch/organisation on Notification template

It is now possible to add a code for viewing company logo in emails sent from the system. This is done by editing the used notification template:

1. Upload the company logo in Branches (CS101500) window on the Logo tab.

2. Open the Notification templates (SM2040PL) window and select your template.

3. Set the Message form in the HTML mode and copy in the wanted link

(e.g. <img src="~/Frames/GetFile.ashx?cache=yes&file=((Document.BranchID.LogoNameReport))" objtype="attached" embedded="true" title="img">

4. Test the output by sending an email from the system.

Report layout updates

The layout of the following reports has been updated:

- Trial balance summary (GL63200S)
- Transactions for period (GL63300S)
- All unreleased documents (GL65601S)
- Unreleased transactions summary (GL61150S)
- Unreleased transactions account distribution (GL61100S)
- Unreleased transactions account distribution (currency) (GL61120S)
- General ledger register (GL62050S)
- General ledger register (detailed) (GL62100S)
- Journal transactions list (GL63302S)
- Balance sheet specification/Open entries (GL63309S)
- Audit transaction list (GL63303S)
- Transactions with external codes (GL63304S)
- Balance with external codes (GL63201S)
- Account specification (GL63301S)
- Balance by supplier (AP63250S)
- Supplier summary (AP65500S)
- Balance by supplier (currency) (AP63300S)
- Cash requirements (AP61200S)
- Sent payments (AP61300S)
- Supplier specification (AP65200S)
- Customer summary (AR65050S)

- Incoming payments (AR63050S)
- Bank statement (CA60650S)

New features in API

Create shipment directly from Shipment endpoint

You are now able to create a shipment directly from the Shipment endpoint. After adding a shipment, you can add sales order(s) to it via the AddSOOrder action. Also, the addSOLine action has been refactored to be a POST instead of PUT.

See the swagger documentation for more information.

Stock items' warehouse defaults available in API

You are now able to GET/POST and PUT warehouse information via the API.

See the swagger documentation for more information.

Business account type in Contact endpoint

The field BusinessAccountType is now available via the Contact endpoint.

See the swagger documentation for more information.

Edit payment reference for sales orders

You are now able to edit payment reference for Sales order types CR and CS. In other cases, the field is ReadOnly.

See the swagger documentation for more information.

Notes in Shipment endpoint

You are now able to GET/POST/PUT notes on both the shipment header and the shipment lines from the Shipment endpoint. You are also able to GET notes on shipment order lines.

See the swagger documentation for more information.

Materials via Timecard endpoint

You are now able to GET/POST/PUT materials via the Timecard endpoint.

See the swagger documentation for more information.

General ledger accounts in Customer endpoint

All general ledger accounts are now available for the GET/POST/PUT operations in the Customer endpoint.

See the swagger documentation for more information.

Send time cards to Approval

For third party integrators, there is a new API endpoint for sending of time cards to Approval.

See the swagger documentation for more information.

Update employee code in API

For third party integrators, there is a new API endpoint updating of employee code using the internal employee ID.

See the swagger documentation for more information.

Create shipments and add sales orders

You are now able to create a shipment directly from the Shipment endpoint. After adding a shipment, you can add sales order(s) to it via the AddSOOrder action.

See the swagger documentation for more information.

Notes in PurchaseOrder endpoint

You are now able to GET/POST/PUT notes on both the header and the lines in the PurchaseOrder endpoint.

See the swagger documentation for more information.

Values for exchange rates

You are now able to GET/POST/PUT values for exchange rate in the PurchaseOrder and PurchaseReceipt endpoints.

Expose and override invoice address and contact information on CustomerInvoice endpoint

You are now able to override the invoice address and contact information fields fetched from the customer when posting to the CustomerInvoice endpoint.

You are now able to GET/POST/PUT currency in the CustomerContract endpoint. GET on currency is available via summary.

See the swagger documentation for more information.

Get credit terms

You are now able to GET credit terms via the CreditTerm endpoint.

See the swagger documentation for more information.

Override invoice address and invoice contact

You are now able to override invoice address and invoice contact in the CustomerCreditNote and CustomerDebitNote endpoints.

See the swagger documentation for more information.

Update fields via CustomerContract endpoint

You are now able to updated the following fields via the CustomerContract endpoint:

- setupPrice
- recurringPrice
- extraUsagePrice
- renewalPrice
- Setup Contract
- Activate Contract
- Setup and Activate Contract
- Upgrade Contract
- Activate Upgrade
- Terminate Contract

See the swagger documentation for more information.

New filter fields in Contact endpoint

The following fields are now available as filters in the Contact endpoint:

- displayName
- active
- firstName
- lastName
- businessAccount
- email

See the swagger documentation for more information.

Filtering on invoice reference number

You are now able to filter upon InvoiceReferenceNbr on the payment line for the CustomerPayment and SupplierPayment endpoints. If there are several documents connected to the same payment, all of them will be displayed.

See the swagger documentation for more information.

Sales categories available via Inventory endpoint

Sales categories are now available via the Inventory endpoint for GET specific. For GET all, expandsalescategories=true needs to be specified.

See the swagger documentation for more information.

Correct confirmed shipments

You are now able to correct a confirmed shipment.

See the swagger documentation for more information.

Item details in shipment allocation

The description of the item on allocation is now available via GET all and Get specific on the Shipment endpoint.

See the swagger documentation for more information.

Discount fields in CustomerInvoice endpoint

The fields discountTotal and discountTotalInCurrency are now available via GET in the CustomerInvoice endpoint.

See the swagger documentation for more information.

Post and put for application lines

The CustomerCreditNote endpoint now supports POST and PUT for application lines.

Put and post in Account endpoint

The PUT and POST methods have now been exposed in the Account endpoint.

See the swagger documentation for more information.

Sales

Address 3 for sales

Sales (SO301000)

The field Address 3 has been added in the tabs Financial settings and Delivery settings.

New fields on sales order confirmations

Order confirmation, right address (SO64118S)

There are the following new fields on the report:

- LocationEDICode (EDICode from customer location)
- Location.GLN (GLN from customer location)

New features in Project Accounting

Project accounting

Pilot: Expense claims reference in the description of suspense account

For a better reconciliation process of payroll transactions, the description of the suspense account line for purchase invoices that are created from the expense claims received in Expense Inbox is now built up from:

- External claim ID from Visma.net Expense
- Internal claim ID from Visma.net ERP
- Claim description

Also the Description field in the Expense Inbox settings section in Supplier ledger preferences has been removed.

Webhook notifications for projects and project tasks

Projects (PM301000)

The Webhook notification feature is now available for the projects and project tasks and it can be used by third party integrators. In the Projects window, on the Summary tab there is a new check box called Webhook notification. When it is selected, a new tab Webhook notification will be visible. It shows and saves all the changes done on the project and project task.

For notifications to work for project tasks, changes have to be done in the Project tasks window (PM302000). The messages are sent to all third party integrators that have subscribed to this window. The Webhook notification check box is also available in the Project templates (PM208000) window.

Time and expenses

Pilot: Maximum number of expense receipts displayed

Expense receipt (EP301000)

In the previous versions, a maximum of four expense receipts were shown in the table of the Expense receipt window in the Expense Inbox. You had to go to next page to see the other expense receipts of the expense claim.

In this version, the maximum amount of expense receipts shown adapts to the size of the window.

Project task description on time card lines

Employee time card (EP305000)

From this version on, the description of the project task is copied to the Description column on the time card lines on both the Summary and Details tabs.

Pilot: Internal reference number in Expense Inbox

Expense Inbox (EP50604S)

From this version on, you can see the column Internal ref no. in Expense Inbox without having to add it manually in the table.

Improvements in Finance

General ledger

Void reconciliation documents created in the past

Journal reconciliation (GL30201S)

You are now able to void any reconciliation documents created in the past. However, if the reconciliation document is not the last one, the reconciliation balance will not be editable. This to ensure that the beginning balance on the next reconciliation document is correct.

Full access to Journal reconciliation preference

Journal reconciliation preference (GL30200S)

Earlier, Financials Users did not have full access to the Journal reconciliation preference window. This has now been fixed because the window is an extension of the Chart of accounts.

Warning message on reversal of journal transactions

Journal transactions (GL301000)

Earlier, the warning when reversing a batch created from another workspace was not displayed, but now you will get the following warning message:

"The reversal of a batch that originated in the [module] workspace can lead to inconsistency between data in the modules. Are you sure you want to reverse the batch that originated in the [module] workspace?"

Performance of budget import improved

Budget (GL203010)

Earlier, the import of larger budgets was slow, but the performance has now been improved.

Columns missing in journal reconciliation

Journal reconciliation (GL30201S)

Earlier, the columns Post period and Transaction date were not available in the Journal reconciliation window.

This has now been fixed.

Update of budget lines

Budget (GL302010)

In earlier versions, when you wanted to update a budget in the Budget, the system added new lines to the budget instead of updating the existing account lines.

This has now been fixed.

Supplier ledger

Buyer's order reference number not saved

Invoice inbox (AP50604S)

When you clicked View details to navigate to the Invoice details (AP50605S) window and created an invoice directly there, the invoice would appear in a pop-up window. When you added a Buyer's order no. in the pop-up window, it would not be saved on the first try.

This has now been fixed.

Visma.xml not downloaded to Visma.net ERP

Invoice inbox (AP50604S)

Earlier, there was an issue with some incoming invoices from DI-Business getting not imported to the Invoice inbox.

This has now been fixed.

Length restriction in export to AutoPay

Process payments (AP50300S)

In previous versions, in unstructured remittance for AutoPay, no more than 140 characters were exported. This was stopping you from seeing all invoices included in the payment in the remittance info.

This has now been fixed and there is no length restriction in the field. Moving forward in the process, AutoPay handles this in regards to the bank character restrictions.

Invoices not visible in manual payments

Manual payments (AP30200S)

Earlier, invoices were not displayed in the Manual payments window.

This has now been fixed.

Void pre-booked purchase credit invoices

Purchase invoices (AP301000)

Earlier, you were not able to void a pre-booked purchase credit invoice.

This has now been fixed.

Adding initial approver and document

Purchase invoices (AP301000)

Earlier, there was an error when you added an initial approver and attachment at the same time on a document.

This has now been fixed.

Customer ledger

Booking sales invoices on closed period

Sales invoices (AR301000)

Earlier, you were able to save and release a sales invoice, even if the period set on the invoice was closed in Customer ledger and the option Allow posting to closed periods was not checked.

This has now been fixed. If the customer ledger period is closed and it is not allowed to post on closed periods, the invoice cannot be saved or released with that period set.

Term start date and Term end date available

Sales invoices (AR301000)

Earlier the columns Term start date and Term end date were not available for the Sales User and Sales Admin roles in the sales order document details.

This has now been fixed. Previously they were only visible for the System Administrators.

Item class description missing

Sales profitability by item class and item (AR674000)

Earlier, the Item class description disappeared from the report.

This has now been fixed.

Item search in sales prices

Sales prices (AR202000)

Earlier, when you tried to select an item ID which contained "_" , the system returned an error.

This has now been fixed.

Financial period on customer summary

Customer summary (AR401000)

Earlier, you got an error message when running the Customer summary inquiry and it did not open if the current business date was in a financial period that had not been setup in the system.

This has now been fixed.

Send invoices to AutoInvoice from invoice printing

Print invoice (AR508000)

We have now improved the way the invoices are processed to AutoInvoice in the Print invoice window.

Earlier, there was an issue where invoices were set as Sent to AutoInvoice according to the Print invoice window. However, when looking in the Customer invoice maintenance (AR508500), you saw that the invoices had not been sent.

This has now been fixed.

Values of Disc. allowed and COGS from the same source

Customer history (AR652000)

Earlier, on the Customer history report, the fields Disc. allowed and COGS got their values from the same source.

Now the COGS formula has been updated like Sum(iif ([BaseARHistoryByPeriod.FinPeriodID] = [BaseARHistoryByPeriod.LastActivityPeriod],[ARHistory.FinPtdDiscounts],0)) and the issue is fixed.

Cash management

Case sensitive bank matching

Import bank transactions (CA306500)

Earlier, bank matching was case sensitive. Now, the matching is done regardless of invoice number with uppercase letters or lowercase letters (for the invoice number series containing letters).

Supplier reference and description disappear in bank transactions

Process bank transactions (CA306000)

Earlier, supplier reference and description disappeared after matching supplier ledger bank transaction.

This has now been fixed.

Process bank transactions with 0,00 amount

Process bank transactions (CA306000)

Earlier, you were not able to process bank transactions with 0,00 amount for customer documents in the Process bank transactions and Process incoming payments windows.

This has now been fixed.

Fixed assets

Fixed assets workspace available for Financials Light User

Earlier, the Fixed assets workspace was not available in the read only mode for the Financials Light User role.

This has now been fixed.

Index was outside the bounds of the array

Fixed assets (FA303000)

The error "Index was outside the bounds of the array" will not occur anymore when you select the tabs Depreciation history, Transaction history, and Reconciliation in the Fixed assets window.

VAT

Send or download a SAF-T report for multi-branch companies

Process VAT report (TX502000)

It has not been possible to send or download a SAF-T report for multi-branch companies. The Send/Download buttons were disabled.

This has now been fixed and the Company/Branch columns are following the VAT report when you have selected a company and branch.

The company and branch filters are only visible when the multi-branch functionality is activated. Only with the options Companies with branches require balancing and File tax by branch the branch will be visible and it is mandatory to create a report.

Address details missing from employees

SAF-T report (TX50600S)

Earlier, employees who had transactions were displayed in the SAF-T report but without postcode and city, even if they had them filled out in the Employees window.

This has now been fixed.

Also, the lookup from SAF-T now opens the Employees window screen instead of an empty supplier window.

Void and resend Intrastat report

Process Intrastat report (TX50900S)

Earlier, if an Intrastat report had the status Waiting response, you were not able to resend it. From now on, you can void the report and try to send again in the Process Intrastat report window.

Other

Reverse a batch using generic inquiry

Generic inquiry (SM208000)

In the Generic inquiry window, you now have the option to automatically confirm any dialog window raised during the execution of the selected actions that have been set up on the Mass actions tab.

If this option is selected, the system will during the execution of the action assume that you have confirmed the dialog question, and proceed with the processing. If the option is not selected, you will get a message for each record selected for processing, informing you that the action must be executed manually from within the window where it originally belonged.

As an example, the Journal transactions window contains the Reverse batch action that can be setup to be included in the corresponding generic inquiry window. If the auto-confirmation option for the mass-actions is set, the question presented in the dialog raised by the Reverse batch execution will be automatically answered affirmatively and the action will be carried out. If the option is not selected, the system will not process the selected records and will inform you that the action has to be performed manually. For general ledger journal transactions, this means the batch must be reverted from the Journal transactions window and the confirmation dialog be answered explicitly.

For more information, see Generic inquiry - reference information in the Help Centre.

Translation of Approval details

Earlier, there was an issue with translation for the "Approval details" tab in the Purchase invoices (AP301000) window.

This has now been fixed.

Wrong translation on sales order reports

"Delivery date" was translated as "Desired delivery date" in some languages. This has now been corrected on the following reports: SO64118S, SO64111S, SO641000, SO64108S, SO641010, SO64200S, and SO64101S.

Search with register and transaction values

When running a search in the search bar and both register and transaction values are found, the register values are now displayed first.

Approval Editor down after midnight

Earlier, the Approval Editor stopped working after 00:00 CET.

This has now been fixed.

Import of consolidation data

The error when consolidate data from a source company where some of the segments contain trailing spaces has now been fixed. It is now possible to define segments with trailing spaces or spaces as a part of the segment value.

Correct handling of the mapping where the length is shorter than the segment has also been fixed.

Improvements in API

Delete lines via Customer endpoint

Earlier, the PUT directDebitLines operation Delete did not delete lines via the Customer endpoint.

This has now been fixed.

Deferral code resulting in incorrect VAT calculations

In the previous version, posting a purchase invoice from the API with a deferral code would result in incorrect VAT calculations.

This has now been fixed.

Unable to set post period on supplier invoice via API

In the previous release, there was a issue with the SupplierInvoice endpoint.

The defined financial period and/or post period were ignored when they used the current period. The period was incorrectly taken from the date.

This has now been fixed.

Update of customer and company name

Earlier, if you updated the customer name via the Customer endpoint, it did not update the company name.

This has now been fixed.

Attachments to stock items

Earlier, attachments uploaded through the API to stock items were not included in the GET response.

This has now been fixed.

Spelling error in Swagger documentation

Earlier, there was a spelling error in the Swagger documentation: Json Schema , "operationId":"Employee_GetAllEmplyee".

This has now been fixed.

Default subaccount of sales order lines

Earlier, sales order lines got their default subaccount value when sending their reason code via the POST SalesOrder endpoint.

Now this has been fixed and the sales order lines get the subaccounts sent through the API.

Query parameter for status in InventoryTransfer endpoint

Earlier, there was no query parameter for status in the InventoryTransfer endpoint.

It has now been added.

Order type query returning all types

Until now, GET specific documents for a customer using the Customer endpoint (/salesorder?orderType=XX) returned all types of customer documents.

This has now been fixed.

Create customer through API and UI

Earlier, when you created a customer through API with a specific customer ID and deleted it from user interface, there was an error when you tried to recreate the same customer with same customer ID.

This has now been fixed.

403 Forbidden / Support "Percent-Encoding" usage for Reserved Characters while calling Visma.Net API

Earlier, you were not able to base64 encode the [key] before calling an endpoint. This has now been fixed.

Example:

If you have an item called called: //:?$ (which included several reserved characters), you can base64 encoded it to Ly86PyQ, and then call the inventory endpoint like this:

/inventory/b64(Ly86PyQ)

This is a proof of concept and should work for all endpoints. We would like to get some feedback about its usage on the developer forum.

Due date and pay date in SupplierInvoice endpoint

In earlier versions, there was an incorrect behaviour in the SupplierInvoice endpoint.

When sending a dueDate without payDate sets dueDate as per request but incorrectly sets payDate according to creditTerms and not leadDays settings on the supplier as intended.

This has now been fixed.

Improvements in Logistics

Inventory

Quantities of items sold and purchased

Summary of items sold and purchased (IN40199S)

Earlier, the inquiry did not show the correct quantities of items sold and purchased. This has now been fixed so that it now includes shipments with the statuses Completed and Invoiced in the Quantity sold column.

Negative quantity amount for item

Adjustments (IN303000)

Earlier, you were not able to set a negative quantity amount in the item lookup window that opens when you click 🔍 in Item ID column in the Adjustments window.

This has now been fixed.

Translation improvements

Assembly confirmation (IN30702S)

Translations in the Assembly confirmation (IN30702S) and Assembly picklist (IN30701S) reports have been improved.

Sales

Issue with GLN number the same as customer ID

Sales orders (SO301000)

Earlier, when creating a sales order for a customer whose GLN number is the same as the customer ID, the customer was automatically replaced with the first created customer in the company.

This has now been fixed.

Default supplier not set on line

Sales orders (SO301000)

Earlier, even though having activated option Override supplier price in Sales orders preferences (SO101000), the default supplier from item (IN202500/IN202000) was not set on the sales order line when activating the Mark for purchase order option.

Now default supplier is set by default from item and the supplier can be overridden.

Ship complete allowed partial shipment

Sales orders (SO301000)

Earlier, when the shipping rule of the document was set to Ship complete and the shipping rule of the line was Back order allowed", the system ignored the shipping rule of the document and let the user create a partial shipment.

This has now been fixed.

Improvements in Project Accounting

Project accounting

Change order column headers and figures

Change order (PM643000)

Earlier, the Change order (PM643000) report did not show the same column headers and figures as in the Change orders (PM308000) window.

This has now been fixed.

Time and expenses

Total time spent error

Time analysis per department (EP40470S)

Earlier, the Time analysis per department inquiry showed both the original time card and the correction time card in the Total time spent field.

This has now been fixed.