Functional Release Notes 8.73.0

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Notice

9.11.2021

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.

General

General deliveries

Release Notes.	Documentation	T

No issues found

API

Release Notes.	Documentation	T
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.	
No webhook notification when sales inv oice status changed to "Cl osed"	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.	

2 issues

Due dates for breaking changes

Release Notes.	Documentation	Due
Breaking change on Currency endpoint	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.	Nov 16, 2021
Breaking change on GeneralLedgerTransacti ons	To improve the performance of GeneralLedgerTransactions endpoint, there are now three new flags to allow users to retrieve extended data only if necessary: expandBranchInfo, expandAccountInfo, includeTransactionBalance. To ensure the API compatibility, the flags were set to True by default but they will be switched to False by November 16th 2021. Please verify swagger documentation and if you consider the extended data is necessary, set the flags to True for your calls.	Nov 16, 2021
Breaking changes on Budget endpoint	From January 18th 2022, the following breaking changes will be committed on GET method of the Budget endpoint: - 'Branch' and 'Ledger' filters will become mandatory. Now they are specified to be mandatory by documentation, but it is not enforced by implementation. - 'FinancialYear' filter will become mandatory - Now, the branch filter requires being specified either by branch full name (example: BranchID - BranchName), either by branch ID surrounded by quotation marks. It will be simplified to require the branch ID without any other marks.	Jan 18, 2022

3 issues

P2P

Release Notes.	Documentation	T
"Correct invoice" feature disabled for tax suppliers	The "Correct invoice" feature has been disabled for tax suppliers in the Purchase invoice (AP301000) window.	
Error with invoice from Invoice inbox and closed periods	Earlier, if receiving an invoice to Invoice Inbox (AP50604S) to a closed period and with the Move invoice to next open/active period check box selected in the Supplier ledger preferences, there was an error and the invoice was not created. This has now been fixed and in this scenario the invoice is created in the next open/active period.	

2 issues

O2C

Release Notes.	Documentation	T
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.	$
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.	
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.	
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.	
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.	

5 issues

Accounting Core

Release Notes.	Documentation	T
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.	
Send all attachments 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.	
Changes for notes and attachments in VAT reporting	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.	
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.	
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.	

5 issues

Accounting Modules

Release Notes.	Documentation	T
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.	
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.	

2 issues