

Standard ERP is a cutting-edge business management system built with extensive experience and the latest technology using an original, unified interface and workflow for a consistent user experience across all popular platforms and devices: Windows, macOS, Linux, Android and iOS.

All previous HansaWorld versions can be updated to the latest released version of Standard ERP.

This document highlights some of the features and enhancements added.

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## TELEPHONY AND COMMUNICATION CENTRE

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### PBX Connection

In the Call Groups register in the Telephony module we have added a field called PBX Connection that gives users the ability to set a specific PBX connection on group calls and planned group calls. On a group call, the audio will be sent from your default PBX Connection to the one set on the Group record.

### IP Whitelist

IP Whitelist register in Telephony > Settings will automatically be filled with:

- the IP addresses of all people that log in
- the IP addresses used by PBX connections
- the IP addresses used by SIP trunks
- the IP address of the server.

The contents of this register will be sent to the Asterisk servers by running Update Asterisk Configuration from the PBX Connections operations menu. The Asterisk servers will unblock whitelisted IPs every 10 minutes.

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## REST API

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Rest API has been made available to customers who are not subscribing to the Webshop module. REST API supports the JSON format: this applies to GET, POST and PATCH calls. Please be aware that we will start charging for API calls when our transaction-based functionality is in place.

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## MYSTANDARD

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MyStandard has received its first package of upcoming visual and functional improvements.

In addition to various technical improvements resulting from the converting of large parts of the MyStandard code from JavaScript to HAL and improving technical logic, speed and reliability, the user interface has received its first re-design, becoming closer to the classical HansaWorld user experience rather than having its own style.

We have worked on security developments, reducing the possibilities for security breaches and user mistakes.

Several functions have been introduced as well, such as creating a folder in the File Manager, uploading multiple files at the same time, selecting multiple files in the File Manager, a smoother experience when creating Test Servers and the ability to review Activity Logs.

When making contract changes to packages with active discounts, a message will appear. MyStandard has been updated to display a message saying "Contract has a Discount. Change of invoicing period should be approved" when a customer attempts to make a change to a package that has a discount applied to it.

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## DATA INTEGRITY

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A Reconcile % field has been added to the Sales Ledger Checking report specification window. It is possible to make the report not show any differences that are equal to or less than the percentage specified in this field.

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## GENERAL

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### Windows Runtime (WinRT)

WinRT support for Windows-based SERP client applications.

The following areas have been improved by the upgrade to WinRT:

- Inline web windows
- HTML emails
- Marketplace
- NC banners
- BI and any other places where online web windows are opened.

## PDF engine

The PDF engine was updated which improved text alignment and support for non-latin fonts such as Arabic and Cyrillic.

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## PURCHASE LEDGER AND EXPENSES

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### CostPocket Integration

We support integration with CostPocket document digitization software. This integration allows for the creation of Purchase Invoices and Expense records when digitized documents are imported from CostPocket.

### Purchase Ledger — Document form field

A form template field “Approved by” has been added to Purchase Order and Payment documents.

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## HUMAN RESOURCE MANAGEMENT

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### Payroll Integration

We support integration with the following payroll software:

- Smartly (NZ)
- BrightPay (Ireland and UK)
- PaySpace (South Africa)
- SmartPayroll (Australia)
- Vikarina (Lithuania)
- Palkka.fi (Finland)
- Avalara (Brazil)

This integration allows for the creation of Nominal Ledger transactions when files are imported from the payroll software.

### Training Plans

A register called Training Plans has been added that can be used to plan and manage employee training. The register allows you to specify the Topic, Training Date, Training Time, Trainer, and Shadower for each training session an employee will attend, and update the Status as the training moves from being scheduled to completed.

### Training Packs

The register called Training Packs has been added. It can be used to group a customized set of Skills from the Skills register to be completed by employees belonging to a certain department. Use Training Packs to check what training an employee should attend, based on their job title.

### Employee Training Report

Use the Employee Training report to find out which employees have completed, are scheduled to attend, or still require certain training. The report can be filtered by Period, Employee, Topic, Status, and Trainer, or a combination of these. Drill into the underlying Training Plan record directly from the report results for more detail.

### Checklists

A register called Checklists has been created to manage induction, termination and other checklists of your choice. Create a Checklist and assign a Person Responsible and Status to each Checklist Point.

### Checklist Points

This setting allows to create customized Checklist Points to be used in the Checklists register. Users need to assign a Code and a Name for each Checklist Point.

### Planned Duration

We have added a Planned Duration field to the Skills record. Use the Planned Duration field to specify the amount of time it should take to complete the Skill.

## Job Title

A Job Title field has been added to the Employee record. Use the Job Title field to enter the employee's job title.

## Exclude Ex-Employees

An Exclude Ex-Employees checkbox has been added to the Skills Evaluation report specification window. Tick this checkbox to prevent ex-employee records from appearing in the report.

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## CRM

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### Duplicate data warning

When creating a Contact, the user will be warned when appropriate about duplicate data in the Email and Phone Number fields.

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## POS

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### Pasting sales documents in POS Invoices

Pasting a Sales Order or Quotation in a POS Invoice automatically links the related records in the Link Manager. When using Paste Special to paste a Sales Order or Delivery in a POS Invoice, only unpaid records will be shown in the selection list.

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## NOMINAL LEDGER

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### Fiscal years

You can add more than 30 fiscal years.

### Accrual Report

Added the option to filter balancing accruals which skips rows with zero balances

### Bank Transaction Mapping

A setting has been added that you can use to map columns in bank import files to fields in transactions. A field has been added to the Bank Transactions import specification window that allows you to select the correct mapping.

## Bank Work-Window

The "Bank Reconciliation" window has been re-labeled "Bank Work-Window". The following logic is used:

When the user clicks on "Import Transactions":

- Bank Transactions will be created. If a Bank Transaction matches an existing Sales Invoice by reference number, a Receipt will automatically be created as well.
- When a bank statement is imported, if the reference number matches the invoice number, a receipt is created regardless of the paid value
- After confirming, the user should approve the Receipt, causing an NL Transaction to be created.
- The right-hand column of the Bank Work-Window has been modified to display the balance of the Transaction matching the imported Bank Transaction.

## Attachments from Transactions Export

This export function in the Nominal Ledger will export all Transactions in the selected period with their attachments.

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## SALES LEDGER

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### Natural Resources Usage Report

A report has been added to the Sales Ledger, showing negative numbers when items have been sold or delivered, and positive when purchased. This report can be used when reporting about packaging to tax authorities.

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## ASSETS

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### Fixed Assets - Create Depreciation Transaction maintenance

Added a note in the Maintenance that will give a warning if any transaction has already been created in the specified period.

The Transaction Date in the specification window will default to the last date in the specified period.

## Account Usage Assets

A checkbox "Automatically create Tag/Object on Asset" has been added.

A field "Asset Tag/Object Type" has been added.

Taken together, these two additions will mean that a unique Object belonging to the specified Object Type will be assigned to each new Asset. This will optimize and make the comparison procedure between the Nominal Ledger and Assets more convenient, allowing for the easier spotting of discrepancies.

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## STOCK

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### Item Labels form

We have added a field to the specification window for the Item Labels form: Price List.

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## SYSTEM

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### System Locking Settings

Under the "Lock" and "Warn" tabs we have added dates for Budgets and Revised Budgets.

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## HOTEL

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### Hotel Settings "Guest" Tab

This setting allows users to change whether and when they want Guest addresses to be requested on Reservation.

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## EMAIL

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### Meeting Invitations

When creating a calendar activity from a meeting invitation email, the customer will automatically be identified by email address and pasted in the activity.

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## TECHNICS

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### "Show Comment" Checkbox in the Global User List report

A "Show Comment" checkbox has been added to the specification window for the Global User List report. This will cause Comments from each Global User record to be included in the report. You can choose to sort the report results by Comment.

### SSL certificate

From the Program Mode register, it is possible to fetch a valid SSL certificate from letsencrypt.org to the server and install it as the current certificate for HTTPS. Validity checks have been implemented to check if there is already one installed and if so whether it is valid. Note: This currently requires a dedicated node. The next phase will address servers on shared nodes.

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## AFRICA

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### NightsBridge Property Management System

We have integrated with NightsBridge, a Property Management solution that allows your business to receive booking requests into the Standard ERP Hotel Module from over 250+ booking channels. Standard ERP receives the booking requests directly from NightsBridge and automatically syncs updated inventory levels back to NightsBridge and the booking channels.

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## ARGENTINA

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### Bank Work-Window

It is possible to import bank statements from Santander Rio bank to perform automatic bank reconciliations.

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## AUSTRALIA

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### Payroll Integration

We support integration with the following payroll software:

- Smartly (AU)

The integration allows for the creation of Nominal Ledger Transactions when files are imported from the payroll software.

### Nominal Ledger

We support integration with the following Banks:

- Commonwealth Bank - Netbank
- Commonwealth Bank - CommBiz
- Westpac Bank

The integration allows for the creation of Bank Transactions when importing files from the Banks.

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## BRAZIL

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### Avalara Integration

We support integration with the Avalara Tax Calculation Engine and E-Invoicing. From Quotations, Sales Orders and Invoices in Standard ERP you can:

- calculate taxes
- issue electronic invoices
- retrieve PDF documents generated by the Tax Authority.

We support the integration of the Nominal Ledger with Avalara (chart of accounts, transactions and balances). You will be able to fulfill the requirements of issuing Tax Compliance Reports on a regular basis. Through Avalara integration you can validate the tax issued by suppliers.

### Boleto Integration

We have an integration with the Boleto payment method regulated by FEBRABAN. Directly from an Invoice in Standard ERP, you can connect to several banks to issue a Boleto Payment Method, retrieve the document, and send it to your customer.

### Systax Integration

We support integration with the Systax tax engine for tax calculations in Brazil.

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## FINLAND

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### Finvoice 3.0 standard implemented for e-invoicing

If the customer or e-invoice operator requires the Finvoice 3.0 format to be used, this can be configured in the Finvoice setting in the Sales Ledger. The option offering the Finvoice 1.3 format has been removed.

### Finvoice has sender & receiver details

The ability to specify electronic invoicing operators on e-invoices has been added. The sender operator can be specified on the "Reg." tab in the Company Info setting. Receivers' operators can be specified in the E-invoice Operator field on the "E-Records" tab in their Contact records.

### Palkka.fi integration for payroll

Customers can benefit from an integration with the Finnish payroll system Palkka.fi. NL Transactions for salaries will be created automatically when salary files are imported using the Palkka.fi import routine in the HR module. Users can specify the relevant accounts for salaries using the Palkka.fi Payroll setting in the HR module.

### Automatic company import selection with company creation

We have added an option to select the company type from a list when creating a company in the database on the first log-in. Relevant settings and set-up information for the selected company type will be imported automatically.

### Paytrail

As required by Paytrail, we have updated our APIs to use their updated payment platform.

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## ITALY

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### E-invoicing

- In CRM>Contacts a check box "Public Administration" has been added. If checked, a field "IPA code" will appear (Public Administration Univocal Number). The purpose of this is to collect data for the XML file required to Invoice to the Public Administration.
- Added support for the latest format of Italian e-Invoicing.

### Monthly declaration "Esterometro"

This functionality allows the creation of three XML files for the "Esterometro":

- A list of all the OKed Sales invoices in a given period.
- A list of all the OKed Purchase invoices in a given period.
- Correcting data in previously sent declarations.

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## LATAM

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### Withholding Report

A report called the Supplier Withholding Report has been added. It is generated based on information collected from supplier documents and customer rebate documents. It has been added for Argentina, Paraguay and Uruguay.

### MercadoPago

We add Transaction Reference numbers to receipts when using PayLink.

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## LATVIA

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### Intrastat Report

We have added an option to allow this report to be run separately for Local Suppliers, EU suppliers and Non-EU suppliers.

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## NEW ZEALAND

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### Purchase Ledger

We support the export of bank files from Payments for the following banks:

- ANZ Bank
- BNZ Bank

The resulting bank files can be imported into the Banks' systems for fast payment.

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## NORWAY

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### SAFT export

We can offer users full support for the new SAFT export, allowing them to export accounting data conforming to the SAFT standard.

### VAT report

Full support for the new VAT report format required from 01-01-2022 has been added. This report is based on VAT codes, not on the chart of accounts.

More information about the changes can be found [here](#).

### Bank Integration

We have supported the exporting of Payments using the ISO20022 format. We support SEB and Nordea banks. A single Payment can contain all types of SEPA transfer, including domestic and international. Transactions can be ordered to the bank separately per invoice or merged per supplier if they share the same payment conditions. Where allowed by the bank, the user can choose payment urgency options. More details can be found in the [white paper](#) with same name.

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## POLAND

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### VAT Declaration

A field for specifying a VAT declaration correction reason has been added to the VAT Declaration record.

We have made a new VAT Declaration report definition that is compliant with the layout that is mandatory from 01.2022: it can be imported by customers from the Setup folder in system installations.

## Unified tax export (JPK)

The following changes were applied to this export:

- The MPP VAT Procedure mark will not be included in files containing data exported for periods from 07.2021.
- A new format for export files has been introduced to support requirements obligatory for data exported for periods from 01.2022.
- We have implemented logic to export country prefix for all foreign contacts used on documents based on Contact country code (regardless of VAT Zone)

Changes to connected records and settings:

- A checkbox has been added to Internal Invoices allowing the user to mark them manually as “Internal documents” if they have not already been marked as such automatically by the system according to the applied logic.
- A checkbox has been added to Internal and Purchase Invoices allowing the user to mark them manually as “Goods import” if they have not already been marked as such automatically by the system according to the applied logic.
- Checkboxes in Sales Invoices for VAT Procedures have been replaced by an Invoice Classification field connected to a setting. Multiple Invoice Classifications separated by commas can be added to a single Invoice. A supporting report has been added to the Nominal Ledger to allow users to check which VAT Procedures were selected in old Invoices as this information is otherwise hidden, in case corrections are needed.

## VAT Report Sales

Sales invoices marked with the “VATOSS” Classification will not be included.

## Export to Ist@t in Sales ledger

The layout of the exported file was updated to include customers' VAT numbers.

## Supplier Check in White Payers List

The Supplier check has been adjusted to take recent changes made to the API into account.

To make supplier checks more secure and accurate, Request Date and Request Code fields have been added to Purchase Invoices and a Request Date field to each Payment row. Users cannot change these fields manually: they will be filled in when a user carries out a Supplier Check Request using the ‘Check Supplier in VAT Payer List’ function on the Operations menu.

If the Supplier Check Request was performed successfully and the user then changes the VAT number or the Bank account number, the system will give a warning and an option to change them back. If the user decides to save the changes, the Request Code and Request Date will be removed as the changed details will no longer be compliant with the officially held information.

## Income & Expense Book report

The layout of this report has been adjusted to match the current legal requirements for the Research and Development columns.

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## PORTUGAL

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### ATCUD

It is possible to add the ATCUD issued by the Portuguese Tax Authority to relevant fiscal documents such as invoices, orders, credit and debit notes.

### E-invoice

We support connecting with the Tax Authority and using their web service to issue electronic invoices in Portugal.

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## RUSSIA

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### VAT declaration

A setting has been added to the Nominal Ledger: VAT Periods, for VAT reporting codes needed in VAT declarations.

A field has been added to the Company Info setting: Tax Authority, for the Tax Authority branch code that will be included in the title page of the VAT report.

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## SAUDI ARABIA

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### Generating Invoices with QR codes

Besides the credit and debit notes, it is possible to generate QR codes for Sales, POS and Restaurant Invoices. QR codes generated fully comply with ZATCA (Zakat, Tax and Customs Authority) requirements and specifications.

The Official Serial Number field in Sales, POS and Restaurant Invoices is filled in once the invoice is "OKed". This field is a ZATCA requirement.

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## SWEDEN

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### ISO20022 payment export

- All types of SEPA transfers can be in one payment file
- User can choose the Urgency option for payment files
- User can merge payments per supplier or make separate payments.

### Bank Work-Window import logic

The Bank Work-Window import logic has been changed so that the import will always match both BBAN and/or IBAN to a payment mode.

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## UKRAINE

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### NL Transactions from Deliveries

Columns for item prices and VAT codes have been added to Delivery records. NL Transactions from Deliveries will include additional rows for the VAT amount.

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## UNITED KINGDOM

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### MTD

We have added support to Standard Accounts for submitting VAT reports to HMRC using MTD.

This gives users the ability to save API requests and responses for each declaration as text files in the MTD folder on the server.

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## URUGUAY

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### E-Invoices

We support electronic invoices working with our partner New Age Data using TAFACE Services.

### QR Code

A QR Code has been added to Invoices based on DGI requirements.

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## USA

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### Bank Statement support added for US banks

Accounts Payable > Settings > Banks > Flip:  
Banking File:

- USA - Chase
- USA - Amex
- USA - Bank of America
- USA - Ally
- USA - Wells Fargo