

Partners | ~ BASIC ~

Updating the VAT status and check date of partners



A VAT status check is valid for the calendar month in which it was performed. To post documents in a new month, the check has to be repeated with the date of the first day of that month.

The **{VAT Status}** and **{Check Date}** data can be updated for all partners at once with the batch process described below. Administrators may also correct that data manually, directly in the partner's ~ **BASIC** ~ tab.

Batch update procedure

1. Creating the file

In the partner list, click the green  icon to start creating the *OIB.txt* file with the list of OIBs of all partners whose data is not up to date.

2. Tax Administration portal

After the file is created, Brix automatically redirects you to the Tax Administration portal, where you have to:

1. Open the *Provjera više obveznika* tab.
2. Under *Provjera > Priloži datoteku* click *Odaberi datoteku*, find and upload the previously created *OIB.txt* file.
3. Enter the check date in the *Datum* field — always the first day of the current month (e.g. 01.03.2026).
4. Click the *Provjeri* button. The portal offers a CSV file for saving, which has to be saved on the computer.
5.  The *Preuzmite podatke o svim obveznicima PDV-a* button must not be used on the portal.

3. Importing the data into Brix

Close the Tax Administration portal and return to Brix. Click the orange  icon to import the data:

1. With the + icon select the saved CSV file from the computer.
2. With the ^ icon send the file to Brix so that the data is updated.

The cycle **creating the file in Brix → checking on the portal → importing into Brix** is repeated until Brix shows the message that there is no more data to download.

Processing rules

Only active Croatian partners with an OIB entered that meet one of the following conditions are

included in the check list:

- they have no **{VAT Status}** entered, or
- the **{Check Date}** field does not hold the first day of the current month.
-  **Regularity** — we recommend running the update on the first day of every month. All invoices for the current month are then ready for correct posting without delays.
-  **Check limit** — the Tax Administration limits a single query to 500 records at most, so the procedure is repeated until the final system message.

Control method and technical limitations

When a document is entered, Brix checks whether the **{Check Date}** of the partner's VAT status is in the same month as the current month. If the data exists, it allows entering and closing the document.



If the delivery date on the document is earlier than the last check date and the partner has changed VAT status in the meantime, Brix uses the currently valid data. That shortcoming could be removed only by keeping a history of VAT status by date, which is highly impractical; the alternative would be a real-time check on the Tax Administration side, like the VIES system.

Accounting firms

If the file creation is started from the Partners form of a company defined in Brix as an accounting firm, Brix creates a single file with the partner list of **all clients** at once. After import, the data downloaded from the Tax Administration updates the partners of all clients simultaneously.

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