Configuration & Administration

- Permission sets
- DEXPRO Core
- eInvoice Sender Setup
- Customer and Vendor Setup
- OAuth 2.0 Setup
- VAT clauses and VATEX codes

Permission sets

In order to use the modules, the appropriate authorization set must be assigned to the respective users.

The following are supplied with:

- DXP Core Admin - DEXPRO Core Administrator
- DXP Core User - DEXPRO Core User
- DXP eInvoice Admin - DEXPRO eInvoice Administrator
- DXP eInvoice User - DEXPRO eInvoice User
- DXP eInvoice Support - DEXPRO eInvoice Support (read-only access to every eInvoice table, including artifact bytes and logs, plus Execute; intended for support and audit diagnosis with no write access)

Users without an eInvoice permission set

Users who do not work with e-invoices do not need an eInvoice permission set. The standard pages and processes the app extends keep working for them, for example the posted sales, service and purchase documents, the purchase credit memo, the Payment Methods and VAT Clauses pages, postings of documents that cannot become an e-invoice (such as purchase invoices or shipments) and emails of such documents. For these users:

- the **eInvoice Payment Type** column on the Payment Methods page shows **None**;
- payment methods they create, change, rename or delete are not carried over into the e-invoice payment mapping - a user with an eInvoice permission set should then set the **eInvoice Payment Type** of a new or renamed payment method on the Payment Methods page;
- the KoSIT report actions on posted documents find no report, and the e-invoice field validation on the purchase credit memo stays off.

> Users who post or send documents that become e-invoices (sales and service invoices and credit memos, purchase credit memos), or who work with the e-invoice pages, still need one of the eInvoice permission sets.

DEXPRO Core

The DEXPRO Core manages the individual DEXPRO apps and their documents per client.

All documents that have been entered and processed via the various DEXPRO modules in Microsoft Dynamics 365 Business Central are displayed. A global number series, which is used across all DEXPRO apps, is used to complete individual documents. This offers the advantage that users only have to work with one number series per document.

Further information can be found here.

eInvoice Sender Setup

In the eInvoice Sender setup, both the connection to the DIGIvoice system and the processing within the app are set up.

Menu

Download Configuration

This is used to download the configuration and structure of the e-invoice documents.

Related

Document Queue

You can access the document queue via this menu item.

Process Log

You can access the process log of transactions with Digivoice via this menu item.

Customer Setup

You can access the customer-specific setup via this menu item.

Vendor Setup

You can access the vendor-specific setup via this menu item.

OAuth 2.0 Setup

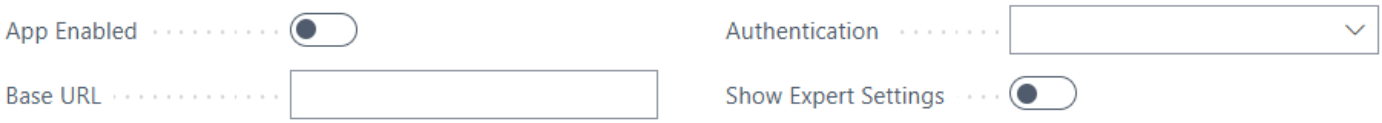
This menu item takes you to the OAuth 2.0 setup for authentication on the Digivoice system.

Mappings

- Payment Term Keywords
- Unit of Measure Codes
- XR Field Structure

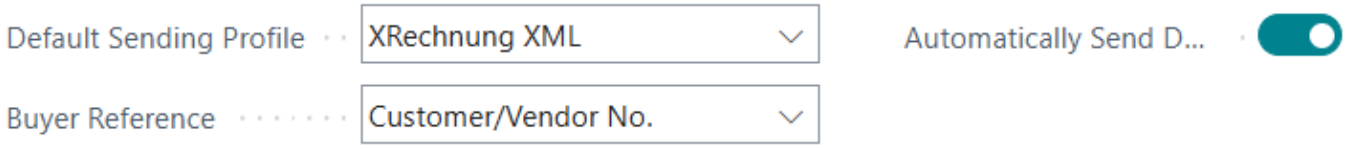
General

In this FastTab, you can activate/deactivate the use of this app and set up the connection to the Digivoice system.



Export Settings

The standards for the export are saved here.



XRechnung 3.0 defaults

The export defaults ship pre-configured for the current XRechnung 3.0 standard. The **Business Process Type** and **Specification Identifier** are the two profile fields that identify the e-invoice standard against which each document is generated:

- **Business Process Type** - default **urn:fdc:peppol.eu:2017:poacc:billing:01:1.0**.
- **Specification Identifier** - default **urn:cen.eu:en16931:2017#compliant#urn:xeinkauf.de:kosit:xrechnung_3.0** (the XRechnung 3.0 CIUS identifier).

> These defaults ensure generated documents declare conformance to XRechnung 3.0. Only change them if you are targeting a different profile and you understand the downstream validation impact.

E-invoice in email sending

When a document is sent through the Business Central email (the **Email** action on a posted document), the app completes the email. Two fields control the attachments:

- **Add eInvoice to Email Attachments** – attaches the e-invoice in the format of the sending profile.
- **Keep Standard PDF with ZUGFeRD** – with the ZUGFeRD sending profile, the ZUGFeRD PDF replaces the document's standard PDF. When this field is on, the standard PDF stays in the email as well. It is off by default.

The following applies:

- Only the standard PDF that Business Central attaches as **<document type> <No.>.pdf** is replaced. All other attachments – such as terms and conditions, incoming-document files or attachments of other extensions – always stay.
- The app only handles the document that is actually being sent. Emailing an issued reminder leaves the email unchanged: the reminder PDF stays the attachment, and no e-invoice is created for the reminded invoices.
- When **App Enabled** is off, the app does not change outgoing emails at all – neither the attachments nor the recipient and CC.

> If another extension renames the standard PDF so that the document number is missing from the file name, the app does not recognise it as the standard PDF. It then stays in the email next to the ZUGFeRD PDF.

Document attachments in the e-invoice

With **Add Document Attachments to eInvoice** switched on, the attachments of the posted document are embedded in the e-invoice as supporting documents - each with its content, its MIME code and its file name including the extension. The field is off by default, because everything embedded goes to the customer: switch it on only if all attachments of your posted documents may be passed on.

- Only the file types XRechnung allows for embedded documents are embedded: pdf, png, jpg/jpeg, csv, xlsx and ods. Attachments of any other type, and attachments without content, are left out; the e-invoice itself is still created.
- The e-invoice file that the app itself attaches to the posted document (**Add eInvoice to Document Attachments**) is not embedded again.
- File names must be unique within a document: two attachments with the same name and extension make the e-invoice fail the KoSIT check.
- The compliance check reports an attachment with a file type that is not allowed, and a file name used more than once, as a warning (rule VAL-ATT-001).

eInvoice Compliance Check

Here you will find the settings for the compliance check.



Document Queue

Here you can specify how long the entries are to be kept.



Expert Settings

The **Show Expert Settings** toggle hides advanced, low-level configuration by default. It is a UI-only switch (it is not stored in the setup). When you enable it, the following additional groups become visible on the setup page:

- **XRechnung** - profile identifiers and XRechnung-specific export defaults (see XRechnung 3.0 defaults above).
- **XML Validation** - settings controlling schema/schematron validation of the generated XML.
- **Validation Patterns** - the regular-expression patterns used by the compliance rules.
- **Object Schemas** - the schema definitions describing the document object structure.

> Leave Expert Settings switched off during normal operation. These groups define how documents are built and validated - incorrect changes can cause generation or validation to fail.

The behaviour of individual compliance rules (enable/disable, severity override, category and stage) is configured separately - see the Rule Setup page.

Customer and Vendor Setup

Customer-Specific Settings

Access via **DEXPRO eInvoice Setup → Customer Setup**

Configuration Options:

- **Override Contact Email**: Use different email than default
- **CC Email Address**: Additional recipients set in CC when sending
- **Automatically Send Documents**: Enable/disable automatic document sending
- **Default Sending Profile**: Default format for this customer
- **Buyer Reference**: Customer-specific reference requirements

Vendor-Specific Settings

Similar configuration available for vendors for purchase credit memos.

Email Templates

The system uses Word-based email templates:

Available Templates:

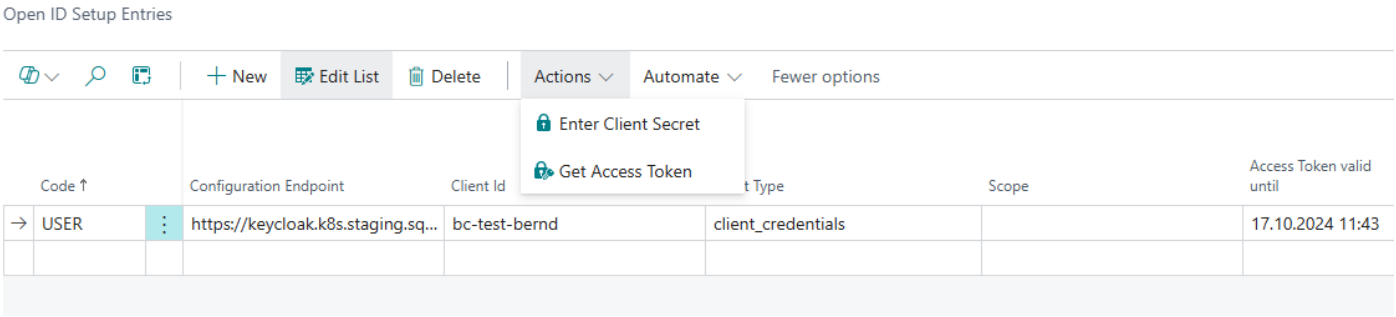
- **SalesInvoiceEmail.docx**: Sales invoice emails
- **SalesCreditMemoEmail.docx**: Sales credit memo emails
- **ServiceInvoiceEmail.docx**: Service invoice emails
- **PurchaseCreditMemoEmail.docx**: Purchase credit memo emails

Template Features:

- Professional formatting
- Dynamic content insertion
- Company branding
- Multi-language support

OAuth 2.0 Setup

The OAuth 2.0 / Open Id users and their access tokens are managed here.



VAT clauses and VATEX codes

When an invoice line is not taxed at the standard or a zero rate - an intra-community supply, a reverse-charge supply, a tax exemption - the e-invoice must state a VAT exemption reason for its VAT category: a text and a code from the EU **VATEX** code list. The text is the description of the VAT clause on the VAT posting setup. The **Code** of a VAT clause in Business Central (for example **EU-19**) is a free key and is never sent as the exemption reason code; instead, the app adds the field **eInvoice VATEX Code** to every VAT clause.

{add screenshot of VAT Clauses here}

Fields and actions on the VAT Clauses page

- **eInvoice VATEX Code** - the VATEX code the e-invoice sends for this clause. Leave it blank to use the detected code.
- **Detected eInvoice VATEX Code** - the code the app recognises from the clause code and description, for example VATEX-EU-IC for "Steuerfreie innergemeinschaftliche Lieferung". It is used as long as no VATEX code is set on the clause. If it is blank or wrong, set the VATEX code on the clause.
- **Suggest VATEX Codes** - lists the clauses that have no VATEX code yet together with their detected code and, after you confirm the list, stores the detected codes on those clauses. Clauses for which no code was detected stay blank; set their code manually.

While the app is enabled, creating or editing a VAT clause fills in the detected code if the clause has no VATEX code yet. A VATEX code that is set on a clause is never overwritten - neither when you edit the clause nor by a later app version with a different detection.

> The list offers the EU-wide VATEX codes that the KoSIT validator used by the Digivoice service accepts. National codes (VATEX-FR-..., VATEX-ES-...) and codes that were added to the code list only recently, such as VATEX-EU-144, VATEX-EU-146-1E or VATEX-EU-159, are not offered, because that validator would reject them.

How the code is detected

A clause code that is itself a VATEX code - **VATEX-EU-IC**, or **EU-IC** without the prefix - is taken as it is. Otherwise the app reads the code, **Description** and **Description 2** of the clause and

recognises the usual wording in German and English, common abbreviations, references to the UStG and the EU VAT Directive (for example § 4 Nr. 1b, § 6a or § 13b UStG, Art. 138, 146 or 194 of the VAT Directive) and the key terms in French, Italian, Dutch and Spanish. It detects:

- intra-community supply of goods - VATEX-EU-IC;
- reverse charge - VATEX-EU-AE;
- export outside the EU - VATEX-EU-G;
- not subject to VAT - VATEX-EU-O;
- the margin schemes for travel agents, second-hand goods, works of art and collectors' items or antiques - VATEX-EU-D, VATEX-EU-F, VATEX-EU-I and VATEX-EU-J.

Only exact patterns count. If nothing matches, or the wording fits more than one case (for example an "innergemeinschaftliche Lieferung" that also mentions "Reverse Charge"), no code is detected. Check the detected codes once and store them with **Suggest VATEX Codes** or set them manually; a stored code no longer depends on the detection.

VAT category of a VAT posting setup

The VAT category of an invoice line follows from its VAT posting setup:

VAT posting setup	VAT category
VAT calculation type **Reverse Charge VAT**	K (intra-community supply) or AE (reverse charge) - see below
VAT calculation type **Sales Tax** with VAT % 0	E (exempt)
Normal VAT or **Full VAT** with VAT % 0, marked as **EU Service**	K (intra-community supply)
Normal VAT or **Full VAT** with VAT % 0	Z (zero rate)
Normal VAT or **Full VAT** with a VAT % above 0	S (standard rate)

Intra-community supply or reverse charge

Business Central posts an intra-community supply of goods and a reverse-charge supply alike with **Reverse Charge VAT**; only the VAT clause tells them apart. If the clause of the VAT posting setup maps to **VATEX-EU-IC** and the setup is not marked as **EU Service**, the e-invoice declares an intra-community supply (VAT category K). In every other case it declares reverse charge (VAT category AE); services to businesses in other EU countries (**EU Service**) are always reverse charge.

Which code the e-invoice sends

- The VATEX code of the clause, if it fits the VAT category of the line.

- Otherwise the category's own code: VATEX-EU-IC for K, VATEX-EU-AE for AE, VATEX-EU-G for G and VATEX-EU-O for O.
- An exemption (category E) has no code of its own: without a fitting clause code, the e-invoice carries only the exemption reason text.
- Lines with standard rate (S) or zero rate (Z) carry no exemption reason, so the VATEX code of their clause is not sent.

Without a VAT clause on the VAT posting setup, the app uses a generic exemption reason text for the category, for example **Reverse charge** or **Intra-Community supply**.

Validation

Rule **VAL-VAT-005** reports, as a warning, VAT clauses that do not decide what they should. The e-invoice is still valid, but it may not say what you intend:

- a clause on a Reverse Charge VAT setup (not marked as EU Service) that maps to no VATEX code - the e-invoice then declares reverse charge;
- a clause on an exemption (category E) that maps to no VATEX code - the e-invoice then carries only the exemption reason text;
- a clause whose VATEX code does not fit the VAT category of its VAT posting setup;
- an intra-community supply whose buyer (the VAT country/region of the document) or ship-to country is not another EU country - check the VAT clause and the VAT Bus. Posting Group of the document.

Two rules report missing data of an intra-community supply as errors, because KoSIT would reject the e-invoice:

- **BR-IC-02** - the buyer's VAT identifier is missing: enter the **VAT Registration No.** on the customer card (on the vendor card for a purchase credit memo).
- **BR-IC-12** - the deliver-to country and the delivery date are required: complete City, Post Code and Country/Region Code of the ship-to address on the document.

The findings appear in the Live compliance check (FactBox) and in the Validation Findings; a VAL-VAT-005 finding about a clause leads to that VAT clause.

> From Business Central 28.4 on, Microsoft's PEPPOL app adds a VATEX code field of its own to the VAT clause. The eInvoice Sender does not read it, so that the e-invoice does not depend on another app - always maintain **eInvoice VATEX Code**.