# eInvoice Sender for Microsoft Dynamics 365 BC - en-US

This documentation covers the essential functions for daily use of DEXPRO eInvoice Sender. For advanced configuration and technical details, refer to the expert setup options and contact support as needed.

- Document Management

- FAQ
  - Troubleshooting

# System Requirements

System requirements for using eInvoice Sender for Dynamics 365 BC

# Supported Microsoft Dynamics 365 Business Central versions

Microsoft Dynamics 365 Business Central integration is possible from the following version due to minimum technical requirements:

Supportet Microsoft Dynamics 365 Business Central Versions

> The prerequisite for operation is that the respective Microsoft Dynamics 365 Business Central version is still in regular support. The extended support is excluded.

# Supported Digivoice Versions

A licensed Digivoice system is required to use the eInvoice Sender in Microsoft Dynamics 365 Business Central and for operation.

**License**: Valid Digivoice License/Credentials

# Installation

# Licenses

## Microsoft

Information about the Microsoft Business Central licenses.

## DIGIVOICE

The DEXPRO Digivoice system that should be connected to Business Central requires a valid customer license.

# Obtaining the DEXPRO module

Detailed Information are here.

## OnPrem

For OnPrem installations, an runtime package with the required apps is provided upon request of a registered reseller / partner. These modules are added to the customer license by the partner and then imported into Microsoft Dynamics Business Central. It should be noted that the DEXPRO Core module forms the basis for all DEXPRO modules and must therefore be imported first.

## Cloud

For cloud installations, you only need the Microsoft AppSource. This is where the required DEXPRO modules are downloaded.

# Setup Wizard

This wizard guides the user step by step through the different facilities of the module.

## Guided Setup Wizard

1. Navigate to **DEXPRO eInvoice Setup** from the search
2. Click **Guided Setup** to launch the setup wizard
3. Follow these steps:

### Step 1: Welcome

- Review the introduction
- **Enable Expert Settings** if you need advanced configuration options

### Step 2: Basic Setup Information

Configure the fundamental settings for electronic invoicing:

- **Base URL**: Web service endpoint for document generation
- **Access credentials**: Authentication details
- **Default settings**: Standard configuration options

### Step 3: Payment Information (if Expert Mode enabled)

- Configure payment method mappings
- Set up bank account details
- Define payment terms

### Step 4: Validation Settings (if Expert Mode enabled)

- Configure document validation rules
- Set field validation patterns
- Define mandatory field requirements

### Step 5: Final Review

- Review all settings
- Click **Finish** to complete setup

# Manual Setup Options

Access additional setup through **DEXPRO eInvoice Setup** page:

**Actions Available:**

- **Document Queue**: View and manage pending documents
- **Process Log**: Review processing history and errors
- **Customer Setup**: Configure customer-specific settings
- **Vendor Setup**: Configure vendor-specific settings

**Mappings Section:**

- **Payment Term Keywords**: Map payment terms to XRechnung codes
- **UoM Code Mappings**: Map units of measure to international standards

# Configuration & Administration

# 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

# 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.

## Menue

### 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.

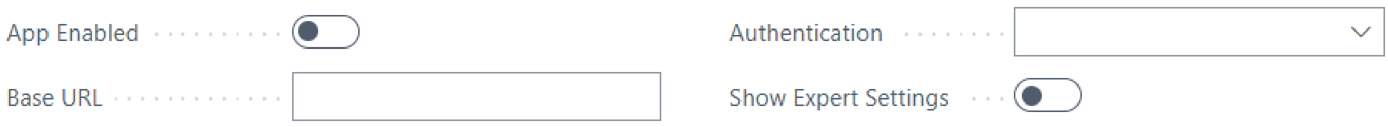
### Mappings

- Payment Term Keywords

- Unit of Measure Codes
- XR Field Structure

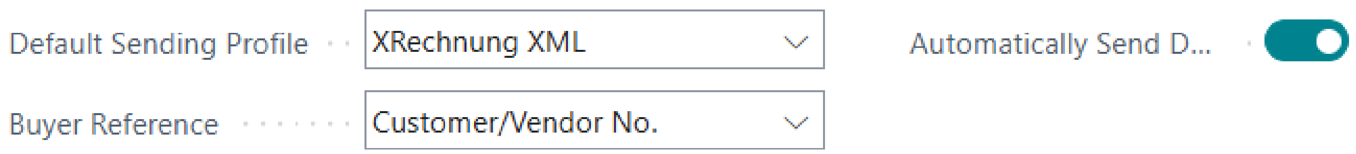
# General

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




# Export-Einstellungen

The standards for the export are saved here.




# eInvoice Konformitätsprüfung

Here you will find the settings for the compliance check.


# Belegwarteschlange

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

| | |
|---|---|
| Days to Keep Entries | 30 |

# Customer and Vendor Setup

## Customer-Specific Settings

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

**Configuration Options:**

- **Override Email**: Use different email than default
- **Automatic Processing**: Enable/disable automatic document sending
- **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:**

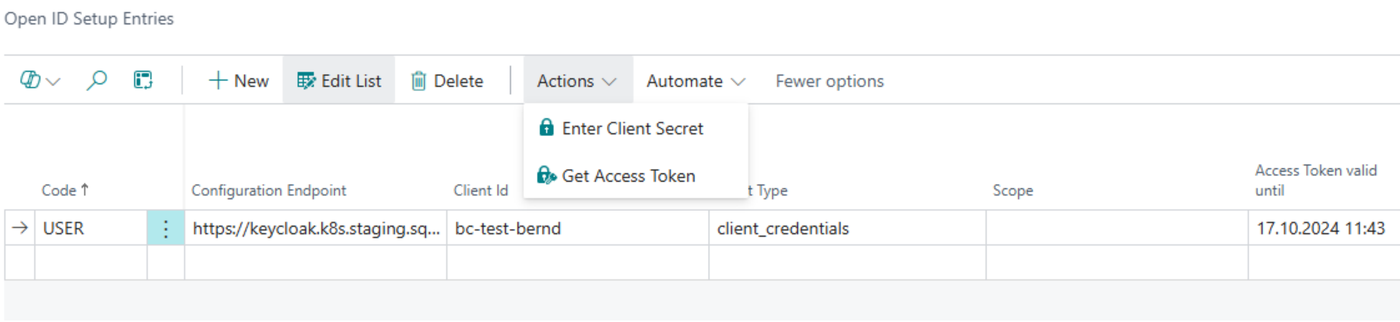
- **SalesInvoiceEmail.docx**: Sales invoice emails
- **SalesCreditMemoEmail.docx**: Sales credit memo emails
- **ServiceInvoiceEmail.docx**: Service invoice emails
- **PurchaseCreditMemoEmail.docx**: Purchase credit memo emails

**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.



# Application / Usage

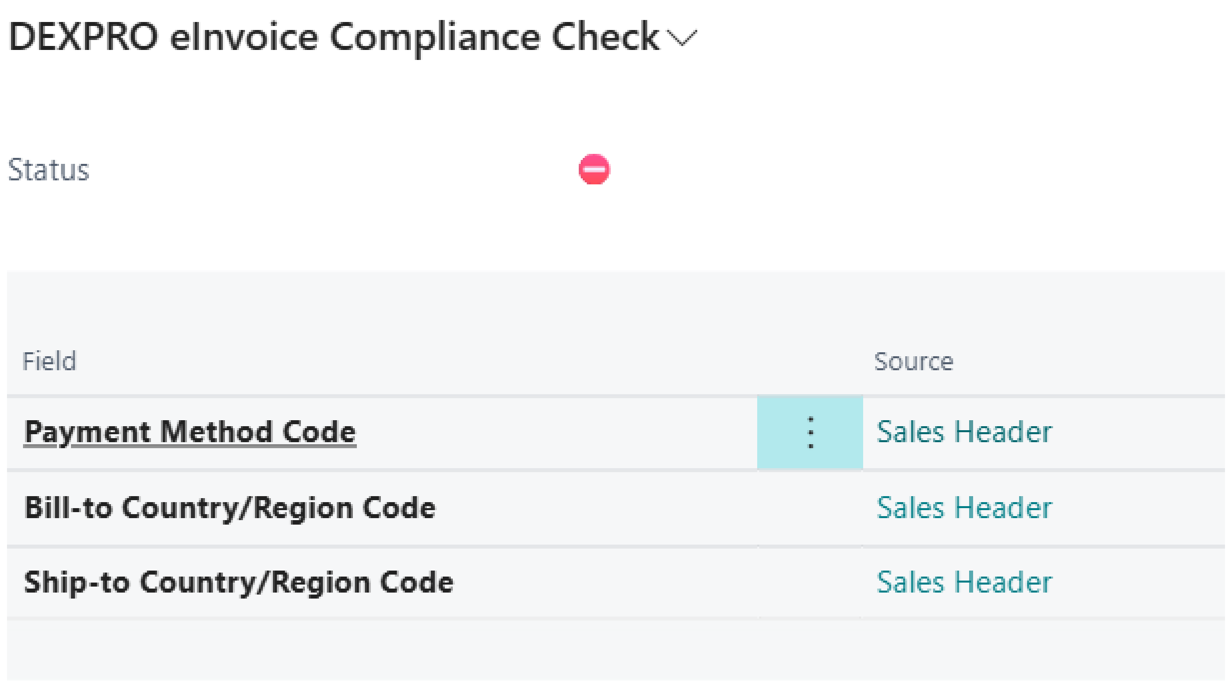
# Working with Electronic Invoices

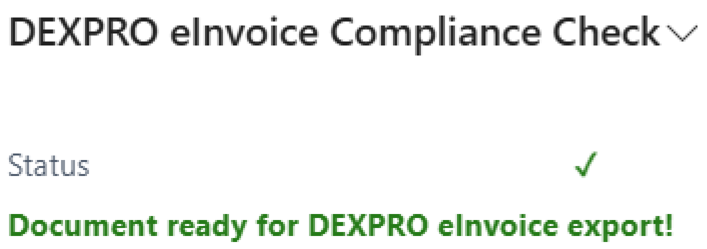
## Sales Documents

### Sales Orders and Invoices

Sales documents such as orders and invoices now have a fact box for the e-invoice conformity check. This informs the user of the following:

- Required fields that are empty
- Validation warnings
- Compliance status






**Common Missing Fields:**

- Customer VAT registration numbers
- Complete billing addresses
- Valid email addresses
- Payment method codes

## Posted Sales Invoices

In the **Posted Sales Invoices** list, you'll see:

**New Fields:**

- **DXP eInvoice Document Sent**: Shows if electronic document was sent

**New Actions:**


- **Download DEXPRO eInvoice**: Download electronic document
- **Email DEXPRO eInvoice**: Send electronic document via email

## Posted Sales Credit Memos

Similar functionality available in **Posted Sales Credit Memos**:

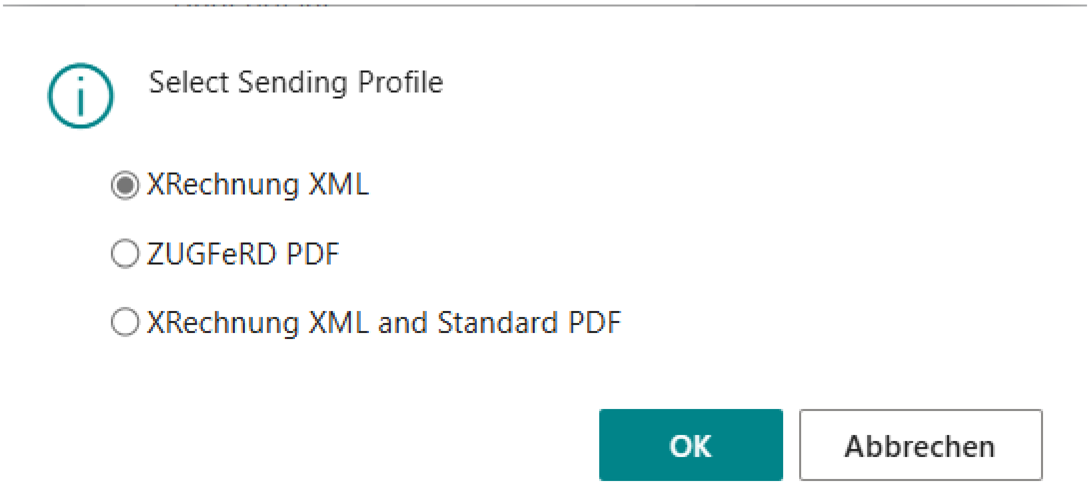
- Document status tracking
- Download and email actions

## Service Invoices

Electronic invoicing is also available for **Service Invoices** with the same functionality.

# Document Types and Formats

When downloading or emailing documents, you can choose from:




1. **XRechnung XML**: Pure XML format compliant with German standards
2. **ZUGFeRD PDF**: Hybrid PDF with embedded XML data
3. **XRechnung XML and Standard PDF**: Both formats in a ZIP file

# Sending Documents

## Manual Sending

1. Open any posted sales document
2. Click **Email DEXPRO eInvoice**
3. Select the desired format
4. System automatically:
   - Generates the electronic document
   - Creates email with appropriate template
   - Sends to customer's email address

## Automatic Processing

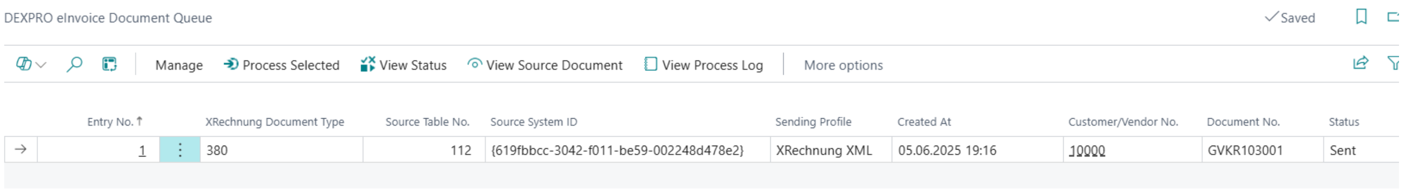
The system can automatically process documents through the **Document Queue**:

- Documents are queued when posted
- Background processing generates and sends electronic documents
- Status tracking shows processing progress

# Document Management

## Document Queue

Access via **DEXPRO eInvoice Setup → Document Queue**




**Columns Displayed:**

- **Entry No.**: Unique identifier
- **Document Type**: Type of document (Invoice, Credit Memo, etc.)
- **Document No.**: Business Central document number
- **Customer/Vendor No.**: Trading partner
- **Status**: Current processing status
- **Created Date Time**: When queued
- **Sending Profile**: Format to be generated

**Actions Available:**

- **Process**: Manually trigger processing
- **Reset Status**: Reset failed items
- **Delete**: Remove from queue

## Process Log

Monitor all system activities via **DEXPRO eInvoice Setup → Process Log**

DEXPRO eInvoice Process Log ✓Saved

Manage

| Entry No. ↑ | Date and Time | User ID | Process Step | Message | Is Error |
|---|---|---|---|---|---|
| 1 | 05.06.2025 19:17 | BERND.FED... | Job Queue Start | Starten des Prozesses für die e... | ☐ |
| 2 | 05.06.2025 19:17 | BERND.FED... | Process Entries | Die Verarbeitung von Einträge... | ☐ |
| 3 | 05.06.2025 19:17 | BERND.FED... | Process Entry | Eintrag in der Verarbeitungswa... | ☐ |
| 4 | 05.06.2025 19:17 | BERND.FED... | Queue Processing Entry 1 | Verarbeitung für Beleg GVKR1... | ☐ |
| 5 | 05.06.2025 19:17 | BERND.FED... | Validation | Validieren des Warteschlangen... | ☐ |
| 6 | 05.06.2025 19:17 | BERND.FED... | Status | Sicherstellen, dass ein Statusda... | ☐ |
| 7 | 05.06.2025 19:17 | BERND.FED... | Queue Processing Entry 1 | Starting email preparation | ☐ |
| 8 | 05.06.2025 19:17 | BERND.FED... | Queue Processing Entry 1 | Email sent successfully | ☐ |
| 9 | 05.06.2025 19:17 | BERND.FED... | Queue Processing Entry 1 | Verarbeitung erfolgreich abges... | ☐ |
| 10 | 05.06.2025 19:17 | BERND.FED... | Process Entries | Abgeschlossene Verarbeitung ... | ☐ |
| 11 | 05.06.2025 19:17 | BERND.FED... | Process Entries | Die Verarbeitung von Einträge... | ☐ |
| 12 | 05.06.2025 19:17 | BERND.FED... | Process Entries | Abgeschlossene Verarbeitung ... | ☐ |
| 13 | 05.06.2025 19:17 | BERND.FED... | Cleanup Start | Aufräumen alter Einträge starten | ☐ |
| 14 | 05.06.2025 19:17 | BERND.FED... | Cleanup End | Finished cleanup of old entries | ☐ |
| 15 | 05.06.2025 19:17 | BERND.FED... | Job Queue End | Abgeschlossener Prozess der e... | ☐ |

### Information Tracked:

- Processing timestamps
- Success/failure status
- Error messages
- Document details

# FAQ

Here you will find questions and answers to various scenarios.

# Troubleshooting

## Common Issues

### Document Not Generating

**Check:**

1. All required fields are completed (use Missing Fields Factbox)
2. Customer has valid email address
3. VAT setup is correct
4. Connection to web service is working

### Email Not Sending

**Check:**

1. Email setup in Business Central
2. Customer email address validity
3. SMTP configuration
4. Process log for error details

### Validation Errors

**Common causes:**

- Missing VAT registration numbers
- Invalid GLN codes
- Incomplete address information
- Unsupported payment methods

## Error Resolution

### Process Log Analysis

1. Open **Process Log** from setup page
2. Filter by date range or document number
3. Review error messages

4. Check **Context** field for specific issues

## Document Queue Management

1. Open **Document Queue**
2. Identify failed items (status indicators)
3. Use **Reset Status** to retry processing
4. Check document data before reprocessing

# Getting Help

## Built-in Guidance

- **ToolTips**: Hover over fields for explanations
- **Missing Fields Factbox**: Shows validation issues
- **Process Log**: Detailed error information

## Support Resources

- Check field validation messages
- Review process log entries
- Verify setup configuration
- Contact DEXPRO Solutions GmbH for technical support

# Best Practices

1. **Complete Setup First**: Run guided setup completely before processing documents
2. **Test with Sample Data**: Process test documents before going live
3. **Monitor Process Log**: Regularly check for processing issues
4. **Maintain Customer Data**: Keep email addresses and VAT numbers current
5. **Review Document Queue**: Monitor automatic processing status