

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.

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System Requirements

System requirements for using elInvoice 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

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.

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.

| | | | |
|-------------------|-------------------------------------|----------------------------|-------------------------------------|
| App Enabled | <input checked="" type="checkbox"/> | Authentication | <input type="text" value=""/> |
| Base URL | <input type="text" value=""/> | Show Expert Settings | <input checked="" type="checkbox"/> |

Export-Einstellungen

The standards for the export are saved here.

| | | | |
|----------------------------|--|-------------------------|-------------------------------------|
| Default Sending Profile .. | <input type="text" value="XRechnung XML"/> | Automatically Send D... | <input checked="" type="checkbox"/> |
| Buyer Reference | <input type="text" value="Customer/Vendor No."/> | | |

eInvoice Konformitätsprüfung

Here you will find the settings for the compliance check.

| | | | |
|----------------------------|-------------------------------------|---------------------------|-------------------------------------|
| Enable Field Validation .. | <input checked="" type="checkbox"/> | Check Sales Documents .. | <input checked="" type="checkbox"/> |
| | | Check Service Docum... | <input checked="" type="checkbox"/> |
| | | Check Purchase Docu... | <input checked="" type="checkbox"/> |
| | | Block Posting on Valid... | <input type="checkbox"/> |

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.

Open ID Setup Entries

| | | | | | | |
|--|------|--|---------------|--------------------|-------|--------------------------|
| <div><div><div><div><div></div><div></div></div><div><div></div><div></div></div><div><div></div><div></div></div></div><div><div>+ New</div><div>Edit List</div><div>Delete</div></div><div><div>Actions</div><div>Automate</div><div>Fewer options</div></div></div></div> | | | | | | |
| | | <div><div>Enter Client Secret</div><div>Get Access Token</div></div> | | | | |
| Code ↑ | | Configuration Endpoint | Client Id | t Type | Scope | Access Token valid until |
| → | USER | https://keycloak.k8s.staging.sq... | bc-test-bernd | client_credentials | | 17.10.2024 11:43 |
| | | | | | | |

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

DEXPRO eInvoice Compliance Check

Status



| Field | Source |
|------------------------------------|--|
| <u>Payment Method Code</u> |  Sales Header |
| Bill-to Country/Region Code | Sales Header |
| Ship-to Country/Region Code | Sales Header |
| | |

DEXPRO eInvoice Compliance Check ✓

Status



Document ready for DEXPRO eInvoice export!

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  Email DEXPRO eInvoice

- **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:



Select Sending Profile

- ☒ XRechnung XML
- ☐ ZUGFeRD PDF
- ☐ XRechnung XML and Standard PDF

OK

Abbrechen

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**

DEXPRO eInvoice Document Queue

✓ Saved

Manage

Process Selected

View Status

View Source Document

View Process Log

More options

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**

 ✓  

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... | <input type="checkbox"/> |
| | 2 | 05.06.2025 19:17 | BERND.FED... | Process Entries | Die Verarbeitung von Einträge... | <input type="checkbox"/> |
| | 3 | 05.06.2025 19:17 | BERND.FED... | Process Entry | Eintrag in der Verarbeitungswa... | <input type="checkbox"/> |
| | 4 | 05.06.2025 19:17 | BERND.FED... | Queue Processing Entry 1 | Verarbeitung für Beleg GVKR1... | <input type="checkbox"/> |
| | 5 | 05.06.2025 19:17 | BERND.FED... | Validation | Validieren des Warteschlangen... | <input type="checkbox"/> |
| | 6 | 05.06.2025 19:17 | BERND.FED... | Status | Sicherstellen, dass ein Statusda... | <input type="checkbox"/> |
| | 7 | 05.06.2025 19:17 | BERND.FED... | Queue Processing Entry 1 | Starting email preparation | <input type="checkbox"/> |
| | 8 | 05.06.2025 19:17 | BERND.FED... | Queue Processing Entry 1 | Email sent successfully | <input type="checkbox"/> |
| | 9 | 05.06.2025 19:17 | BERND.FED... | Queue Processing Entry 1 | Verarbeitung erfolgreich abges... | <input type="checkbox"/> |
| | 10 | 05.06.2025 19:17 | BERND.FED... | Process Entries | Abgeschlossene Verarbeitung ... | <input type="checkbox"/> |
| | 11 | 05.06.2025 19:17 | BERND.FED... | Process Entries | Die Verarbeitung von Einträge... | <input type="checkbox"/> |
| | 12 | 05.06.2025 19:17 | BERND.FED... | Process Entries | Abgeschlossene Verarbeitung ... | <input type="checkbox"/> |
| | 13 | 05.06.2025 19:17 | BERND.FED... | Cleanup Start | Aufräumen alter Einträge starten | <input type="checkbox"/> |
| | 14 | 05.06.2025 19:17 | BERND.FED... | Cleanup End | Finished cleanup of old entries | <input type="checkbox"/> |
| | 15 | 05.06.2025 19:17 | BERND.FED... | Job Queue End | Abgeschlossener Prozess der e... | <input type="checkbox"/> |

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