

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

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