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

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