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

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