

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

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