PDFMAILER.CLOUD for NAVISION and Microsoft Dynamics Business-Central 365

Background information & workshop about
sending electronic invoices

NAV

Create and send electronic invoices with Business-Central 365 and Microsoft Navision NAV **with a few clicks**.

By using a XInvoice standard, Germany is implementing the European standard EN-16931 and transposing the guidelines of the EU Parliament. Suppliers and service providers have been obliged to submit their invoices electronically since 2020, whilst taking the requirements of the EU Directive 2014/55/EU and the Federal E-Invoice Regulation into account.

Suppliers and service providers of public clients of the federal states and municipalities, on the other hand, suppliers and service providers of public clients are dependent on the respective federal state legislation, which partly has not finally been regulated. However, one thing is certain: processes can be simplified by XRechnung or ZUGFeRD documents if software solutions and service providers undertake the tasks.

PDFMAILER.CLOUD

PDFMAILER.CLOUD was developed to make invoice exchange easier for medium-sized companies. Using best practice scenarios and data mapping, PDFMAILER.CLOUD is the solution to provide XInvoice and ZUGFeRD from Microsoft ERP systems on the Windows and web platform with recipient accuracy.
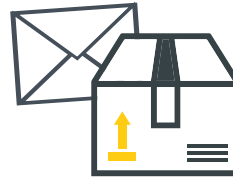
Business mail: **The all-in-one solution**

eInvoices

ZUGFeRD XML

XInvoice XML

Business PDF

ePost letters & parcels

Your advantages of PDFMAILER.CLOUD for Microsoft Business Central or Dynamics NAV at a glance:

✔ Only **one platform** for your entire business mail!

✔ „BEST-PRACTICE" integration supports easy creation of XML content when printing an electronic invoice.

✔ You **reach every recipient** by the appropriate electronic or postal delivery method. By e-mail, via web portal, by post or parcel carrier.

Microsoft Dynamics 365
Business Central

Microsoft
Dynamics NAV

XInvoice, eInvoice, ZUGFeRD –
Who needs what? What is right?

In the context of the EU and German regulations, there are often discussions about XInvoices, eInvoice and ZUGFeRD although the used terms are often not clear for those involved. We bring light into the darkness:

eInvoice

Basically, every invoice that is sent electronically is an eInvoice, therefore an paperless Invoice. These can be invoice data records or image files. These document are usually received as an e-Mail or download from a portal. You probably already download telephone bills from your communications provider, because this industry was one of the first to create electronic bills.

XInvoice

First of all, an XInvoice is a special form of electronic invoice. According to the German regulation, the XInvoice is the transmission standard for electronic invoice data. It specifies exactly which data a corresponding data record must contain and the structure of this data record. This ensures that every recipient can read the data received..

ZUGFeRD

For a long time, German companies have recognized the economic importance of standardised data exchange and therefor formed the „Forum Electronic Invoice Germany" for this purpose. Whether the abbreviation „FeRD" used for this is particularly happy is something everyone can decide for themselves.
The forum laid down rules for data exchange in a „Central User Guide of the Forum Electronic Invoice Germany". This is how the ZUGFeRD format came into being. The ZUGFeRD format is also recognised as an exchange format by companies in accordance with the e-invoice regulation. You can therefore use XInvoice and ZUGFeRD equally.

Full integration of the ZUGFeRD/ XInvoice format in Microsoft Business Central or Dynamics NAV

Workshop

How a receipt or a batch of receipts is processed from Dynamics 365 via gotomaxx PDFMAILER and sent as an XInvoice in each case.

> **Requirements:**
>
> ✔ the report template adapted & provided by gotomaxx to generate the documents from Dynamics
>
> ✔ or own report template incl. corresponding data mapping

Step for step to the **XInvoice**

Select invoice or invoices to be provided as XInvoice from **„Posted Sales Invoices"**

In the **„Print/Send"** menu, click on **„Print"** to confirm the printout. The print dialogue of the browser opens automatically.
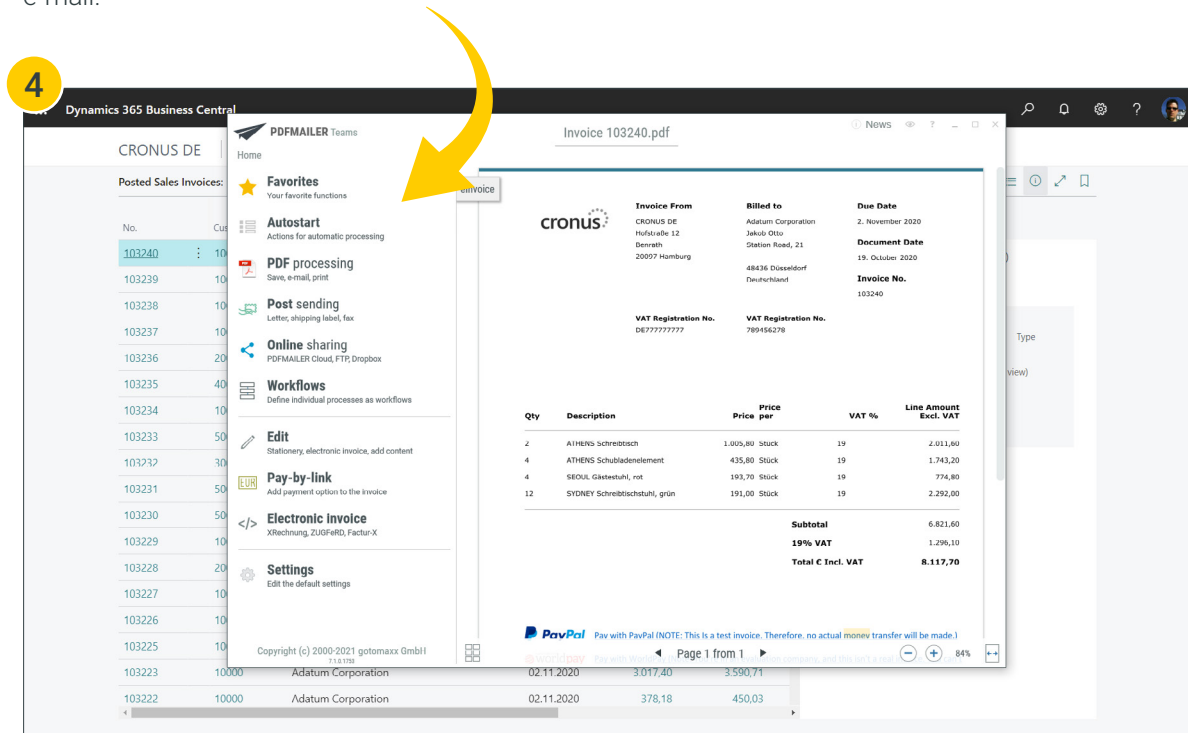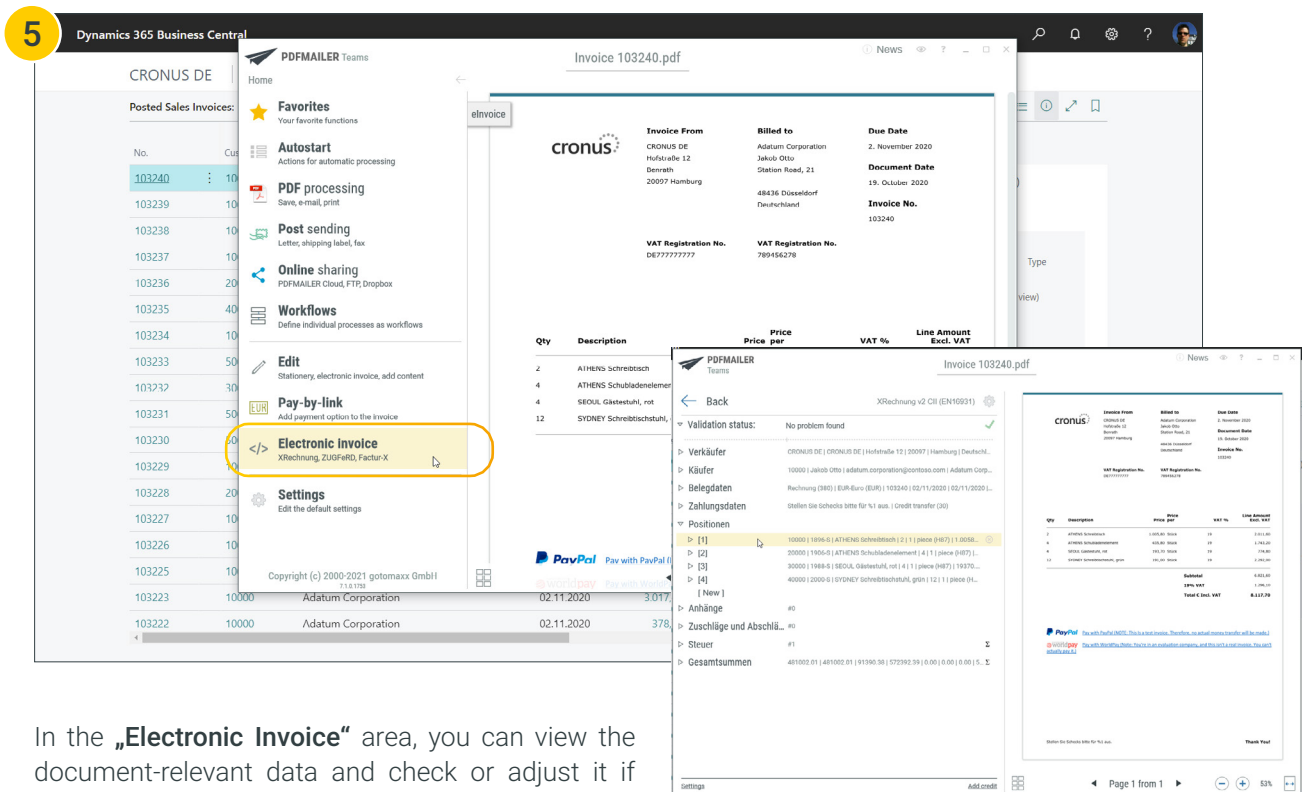

Select **gotomaxx PDFMAILER Cloud** Printer and start printout.

Depending on the setting, PDFMAILER opens or the document is sent directly as an XInvoice by e-mail.

Example: PDFMAILER opens the document again before sending it. You will now see a preview of your previously printed document.

In the **„Electronic Invoice"** area, you can view the document-relevant data and check or adjust it if necessary. As a rule, all data, including all items, should have been transferred via the data mapping within the report template.

In the PDFMAILER menu item **„PDF processing – E-Mail"** you can check all recipient-relevant master data. The recipient's e-mail address as well as a personal subject and body text have been taken over directly here.

Via **„Send e-mail"** you can send the finished XInvoice document directly to your customer. The XML structure created in this way contains all document-relevant invoice data in a corresponding form.

Click here and watch **the video of the workshop**
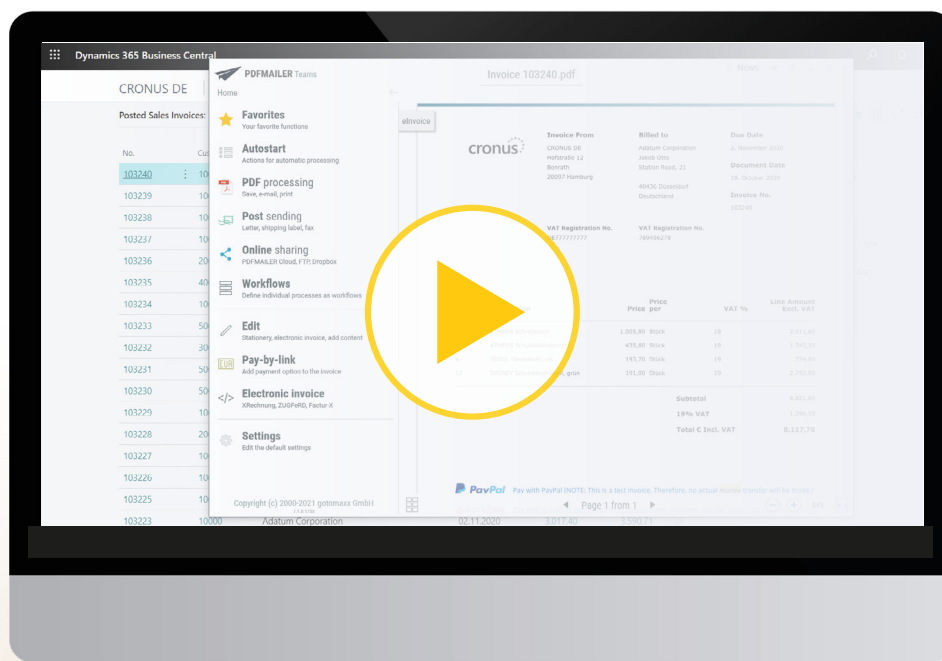
How **PDFMAILER.CLOUD** processes your business mail

Handover

1

Data is transferred via printer interface or transferred as finished files in PDF format.

Processing

2

PDFMAILER.CLOUD now analyses the data or the document for a processing flag and assigns it to a sending profile.

If mapping and control codes are transmitted by the ERP system, complex processing steps can also be carried out.

3

Documents are created with recipient-specific codes, stationery and inserts are added, XML data is created.

4

The control codes for the desired dispatch route or processing workflow are evaluated and the items are transferred to the selected output channel or processed further internally.

Learn more about control codes and data mapping here

Delivery

5

The customised document is delivered to the correct recipient electronically or by post. A copy remains in the recipient portal.

PDFMAILER.CLOUD

For Microsoft NAVISION & Business Central 365

BEST-PRACTICE-Integration

The „ALL-IN-ONE"-solution for Business mail

Digital dispatch & classic dispatch of letters

You reach every recipient by the appropriate electronic or postal delivery method. By e-mail, via web portal, by post or parcel carrier.

Recipient-specific business mail

Microsoft Dynamics 365
Business Central

Microsoft
Dynamics NAV

PDFMAILER.CLOUD

Business PDF

XInvoice

PDF/A – ZUGFeRD

eLetter

Registered mail

Packages/parcels

Recipient

Your next step?

Connect and test
PDFMAILER.CLOUD

[Start now](#)

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gotomaxx