



✓ Digital company

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

Background information & workshop about  
sending electronic invoices



# 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 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



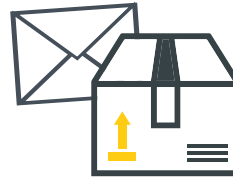
ZUGFeRD XML



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 documents 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 therefore 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

1

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

2

The screenshot shows the Dynamics 365 Business Central interface. The 'Print/Send' menu is open, highlighting the 'Print...' option. The background shows a list of sales invoices with columns for No., Customer No., Customer Name, Currency Code, Due Date, and Amount. The 'Sales - Invoice' dialog box is also visible on the right, showing options for printer, log interaction, and filter.

No.	Customer No.	Customer Name	Currency Code	Due Date	Amount
103240	10000	Adatum Corporation		02.11.2020	8.117,70
103239	10000	Adatum Corporation		02.11.2020	487,79
103238	10000	Adatum Corporation		02.11.2020	2.621,09
103237	10000	Adatum Corporation		02.11.2020	11.969,02
103236	20000	Trey Research		02.11.2020	3.590,71
103235	40000	Alpine Ski House		02.11.2020	191,00
103234	10000	Adatum Corporation		02.11.2020	968,50
103233	50000	Relecloud		02.11.2020	454,58
103232	30000	School of Fine Art		31.10.2020	1.910,00
103231	50000	Relecloud		02.11.2020	2.393,80
103230	50000	Relecloud		02.11.2020	1.671,12
103229	10000	Adatum Corporation		02.11.2020	1.196,90
103228	20000	Trey Research		02.11.2020	4.610,06
103227	10000	Adatum Corporation		02.11.2020	11.969,02
103226	10000	Adatum Corporation		02.11.2020	4.787,61
103225	10000	Adatum Corporation		02.11.2020	5.984,51
103223	10000	Adatum Corporation		02.11.2020	3.590,71
103222	10000	Adatum Corporation		02.11.2020	450,03

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

3

The screenshot shows the Dynamics 365 Business Central interface with a sales invoice displayed. The 'Print' dialog box is open, showing the 'Destination' dropdown menu with 'gotomaxx PDFMAILER Cloud' selected. The background shows the invoice details, including the customer name, invoice number, and line items.

Qty	Description	Price per	VAT %	Line Amount	Excl. VAT
2	ATHENS Schreibblock	1.005,00	19	2.010,00	
4	ATHENS Schulstempel	435,00	19	1.740,00	
4	STROM Schreibblock, gelb	190,00	19	774,00	
12	STROM Schreibblock, grün	190,00	19	2.280,00	
Subtotal				6.824,00	
19% VAT				1.296,00	
Total C Incl. VAT				8.117,70	

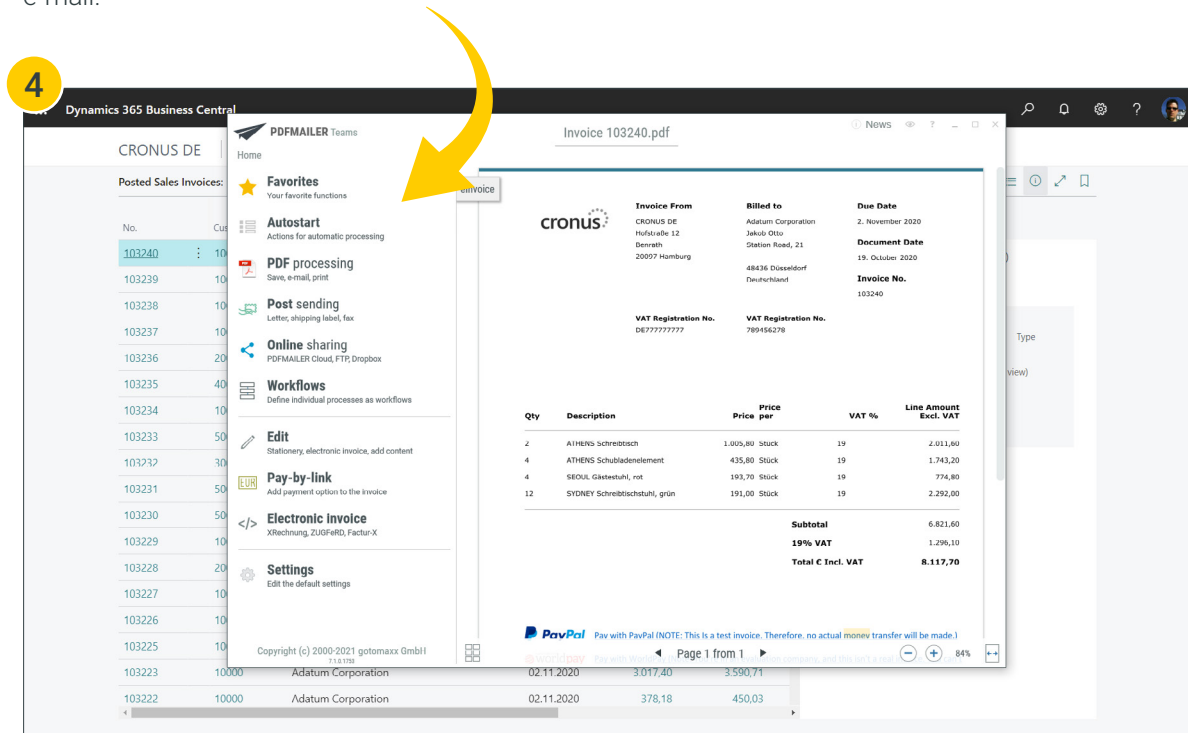


Select **gotomaxx PDFMAILER Cloud** Printer and start printout.

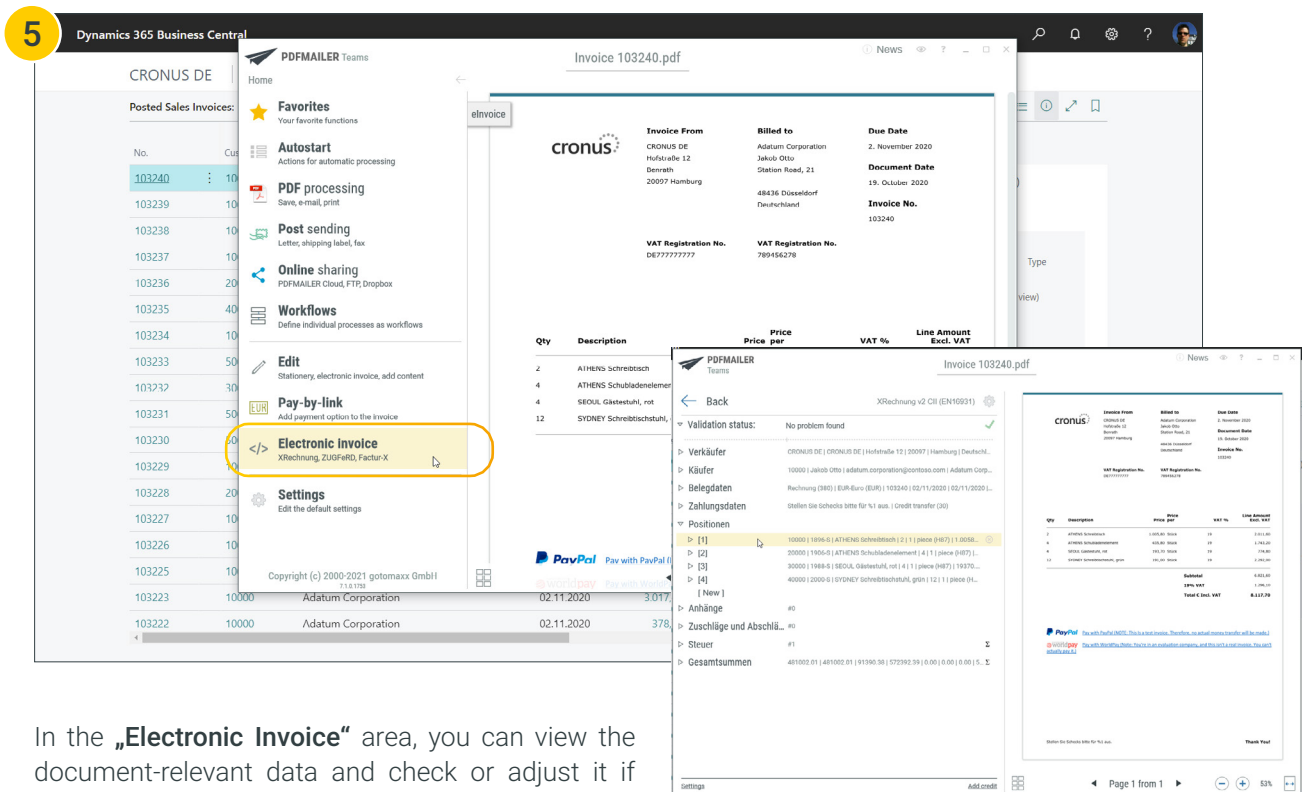
6

PDFMAILER.CLOUD

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.

6 Dynamics 365 Business Central

**PDFMAILER Teams**

Home

Invoice 103240.pdf

**PDF processing**

Save, e-mail, print

**Post sending**

Letter, shipping label, fax

**Online sharing**

PDFMAILER Cloud, FTP, Dropbox

**Workflows**

Define individual processes as workflows

**Edit**

Stationary electronic invoice, add content

**Pay-by-link**

Add payment option to the invoice

**Electronic invoice**

XRechnung, ZUGFeRD, Factor-X

**Settings**

Edit the default settings

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Adatum Corporation

Invoice 103240.pdf

**Invoice From**

CRONUS DE  
Hufstraße 12  
Bonnath  
20097 Hamburg

**Billed to**

Adatum Corporation  
Jakob Otto  
Station Road, 21  
48436 Düsseldorf  
Deutschland

**Due Date**

2. November 2020

**Document Date**

19. October 2020

**Invoice No.**

103240

**VAT Registration No.**

DE777777777

**VAT Registration No.**

789456278

Qty	Description	Price per	VAT %	Line Amount Excl. VAT
2	ATHENS Schreibtisch	1.005,80 Stück	19	2.011,60
4	ATHENS Schuladenelement	435,80 Stück	19	1.743,20
4	SEOUL Gästestuhl, rot	193,70 Stück	19	774,80
12	SYDNEY Schreibtischstuhl, grün	191,00 Stück	19	2.292,00
<b>Subtotal</b>				6.821,60
<b>19% VAT</b>				1.296,10
<b>Total C Incl. VAT</b>				8.117,70

**PDFMAILER Teams**

Home > PDF > Email

E-Mail system:

Microsoft Outlook

**Recipients:**

adatum.corporation@contoso.com

**Subject:**

Enclosed is your invoice with the num

**Attachments:**

Invoice 103240.xml

**Body text:**

Dear Sir or Madam,

Enclosed is your invoice with the number 103240 dated 19 October 2020

☒ Open the E-Mail client

☐ SMS notification

**Send E-Mail**

Invoice 103240.pdf

**Invoice From**

CRONUS DE  
Hufstraße 12  
Bonnath  
20097 Hamburg

**Billed to**

Adatum Corporation  
Jakob Otto  
Station Road, 21  
48436 Düsseldorf  
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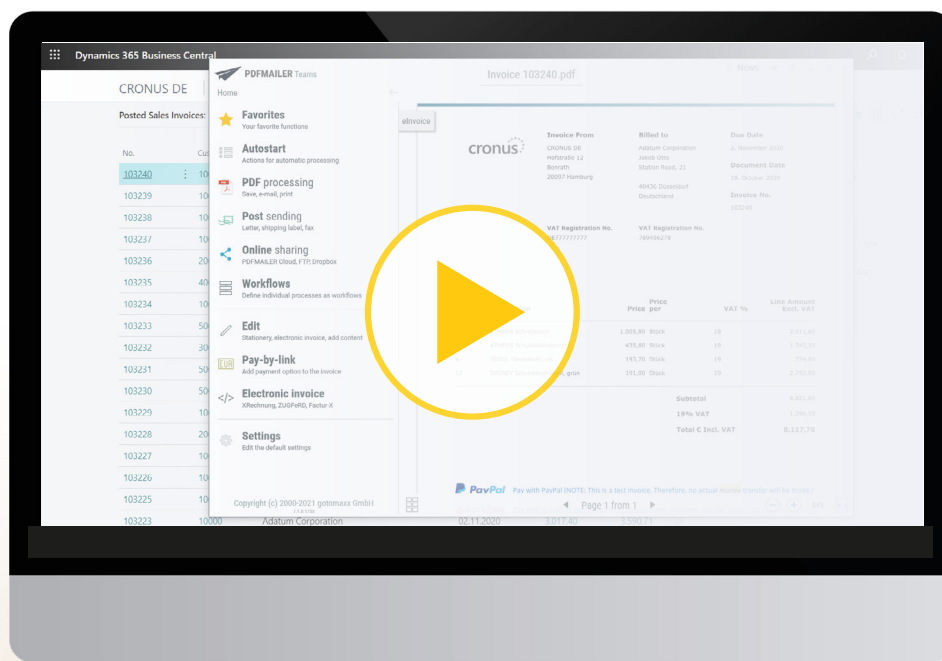
**PayPal** Pay with PayPal (NOTE: This is a test invoice. Therefore, no actual money transfer will be made.)

Page 1 from 1

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.





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**

**eLetter**

**XInvoice**

**Registered mail**

**PDF/A – ZUGFeRD**

**Packages/parcels**



**Recipient**

# Your next step?

Connect and test  
PDFMAILER.CLOUD

[Start now](#)



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