INEXCHANGE E-DOCUMENT CONNECTOR

User Guide

Electronic invoicing in Microsoft Dynamics 365 Business Central

A clear, step-by-step guide

Configure the connector, verify companies and customers, send documents, and monitor delivery status.

Sherpas | Inexchange

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1 About the application

The Inexchange E-Document Connector enables electronic document exchange through the Inexchange platform directly from Microsoft Dynamics 365 Business Central.

The application is built on Microsoft's E-Document Core framework and supports secure, standardized sending of sales invoices, credit memos, service invoices, and service credit memos.

Key benefits

- Electronic invoicing through Inexchange
- Faster delivery and improved traceability
- Status monitoring for sent documents
- PEPPOL BIS 3.0 output from Business Central

MORE INFORMATION

Visit inexchange.se or sherpas.se/inexchange-for-bc for product information and updates.

2 Supported languages

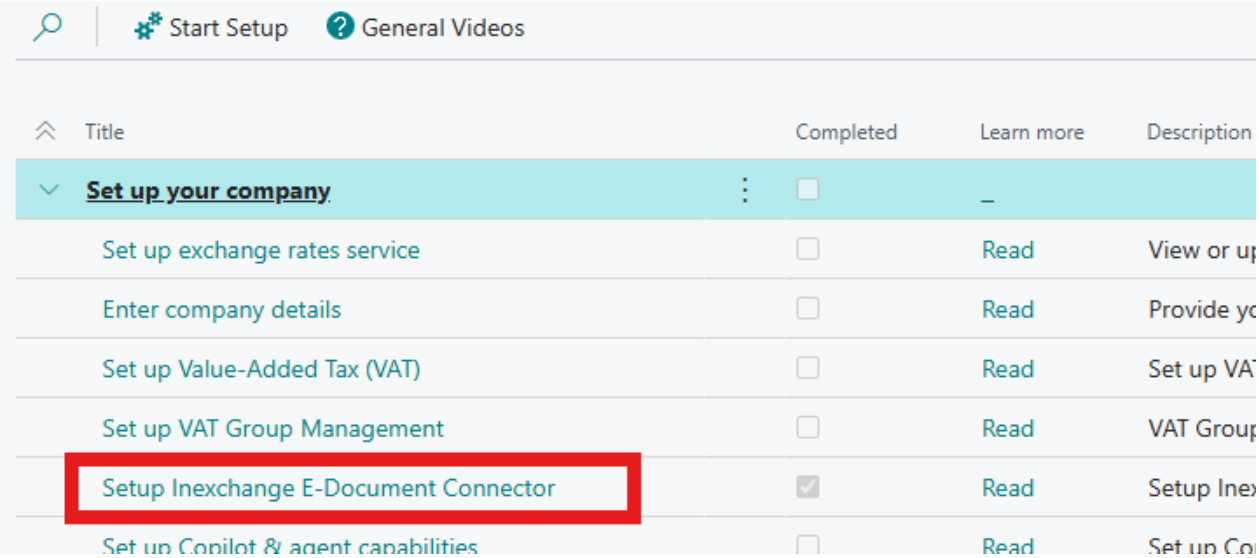
The application supports English and Swedish. The user interface and messages follow the language selected in Business Central.

3 Business Central installation and configuration

Install the application from Microsoft AppSource. After installation, use the guided setup to configure the E-Document service.

3.1 Assisted Setup

Open Assisted Setup and start “Setup Inexchange E-Document Connector”.



Start the Inexchange setup from Assisted Setup.

IMPORTANT

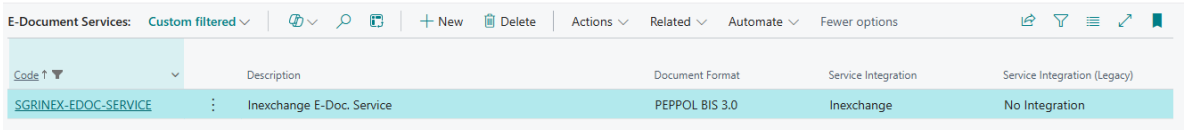
Run the wizard in every Business Central company that will use the Inexchange service.

1	Welcome: select Next.
2	Terms and Conditions: accept the terms and select Next.
3	E-Documents: sales invoice and sales credit memo are selected by default. You can also select service invoice and service credit memo.
4	E-Document service settings: choose whether invoices are sent automatically when posted. If disabled, use “Post and Send...”.
5	Select Complete to finish the configuration.

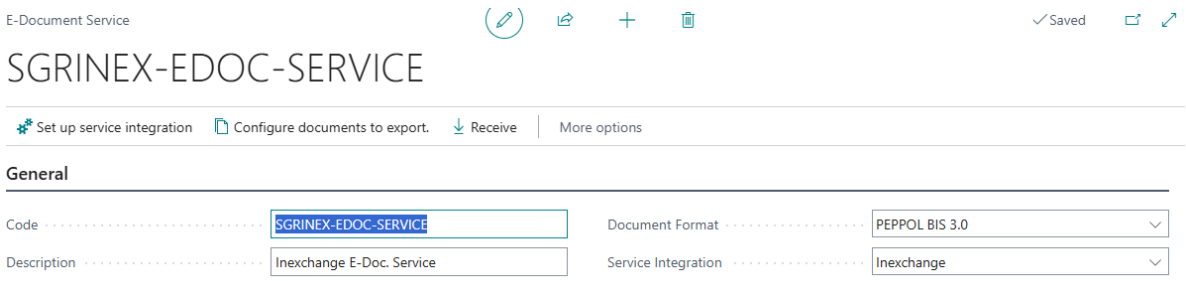
4 E-Document Service

The setup creates an E-Document service with a related workflow and document sending profile.

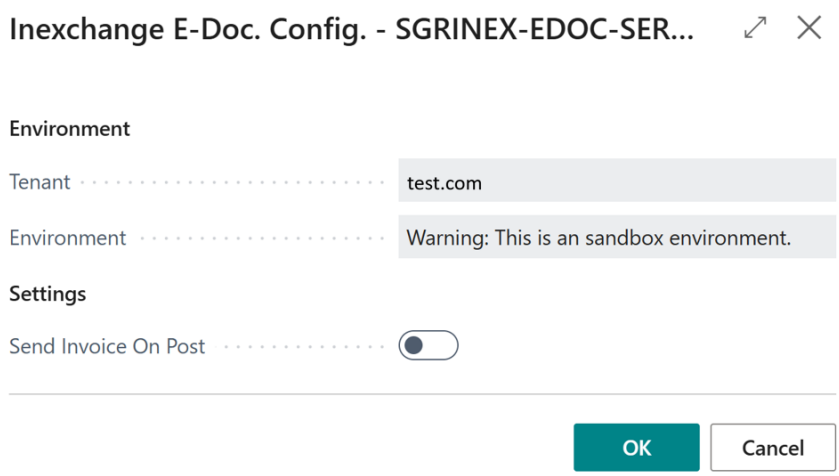
Open the E-Document Services list and select the Inexchange service.



The Inexchange service in the E-Document Services list.



Open the service card to review its configuration.



Service configuration card to review its configuration.

Settings

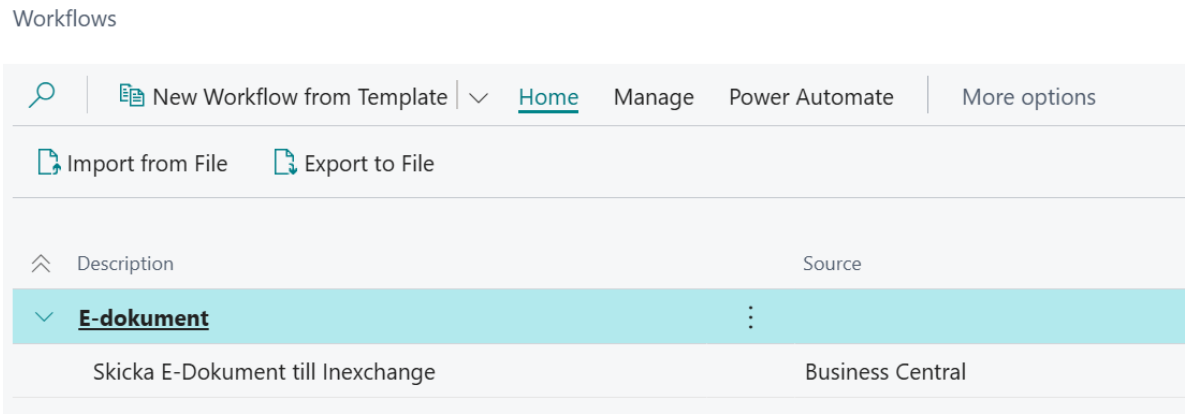
- Send Invoice on Post: automatically sends the document when it is posted. Otherwise, use “Post and Send...”.

PRODUCTION CONNECTION

The app connects to Inexchange production, including when Business Central is running in a sandbox environment.

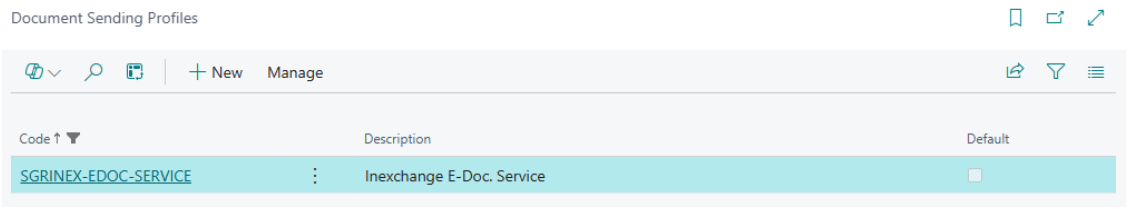
5 Workflow

The setup wizard automatically creates the workflow used by the document sending profile.



6 Document Sending Profile

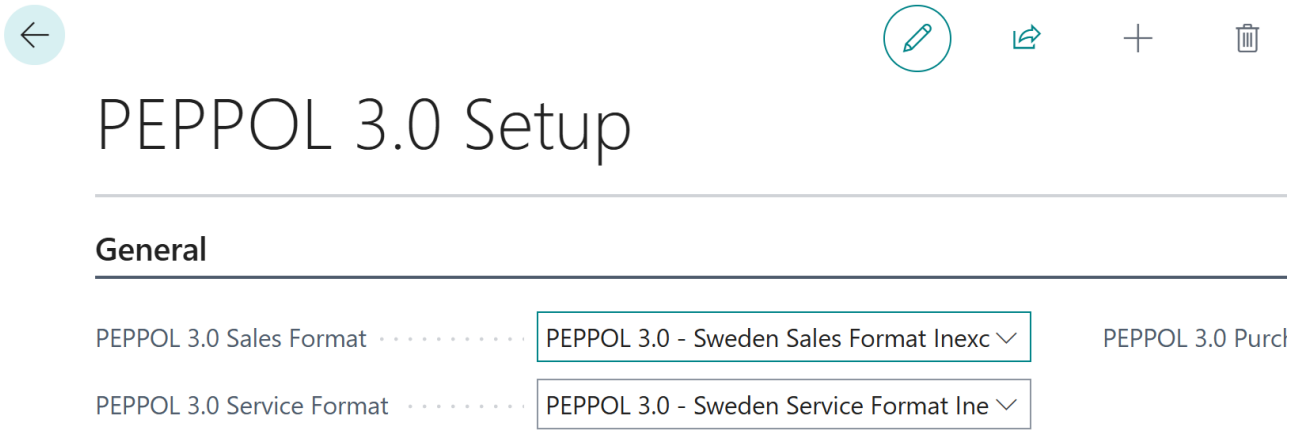
Assign the Inexchange document sending profile to each customer that should receive electronic documents.



7 PEPPOL format

The connector manages the integration between Business Central and Inexchange. Invoices and credit memos are sent using the standard PEPPOL BIS 3.0 format in Business Central. Existing PEPPOL customizations should remain compatible with the integration as long as they are supported by the PEPPOL format.

Settings to be aware of:



PEPPOL Setup page.

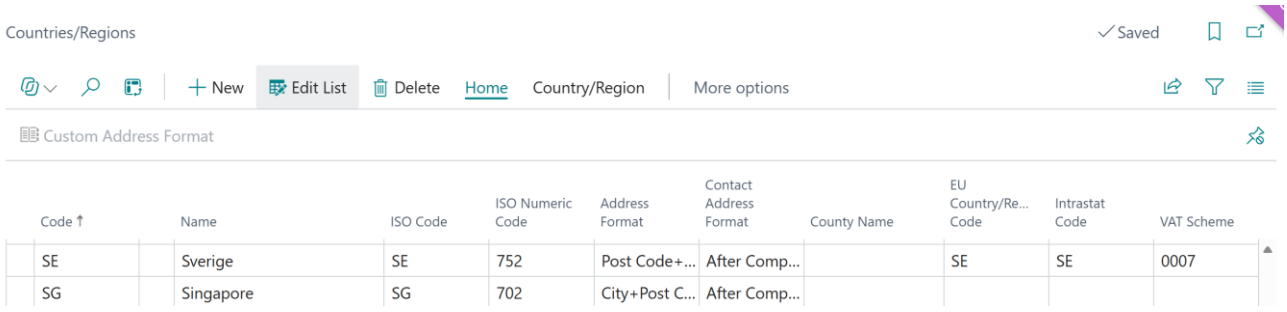
Inexchange Connector app includes a couple of small adjustments, to use them select these formats:
PEPPOL 3.0 – Sweden Sales Format Inexchange
PEPPOL 3.0 – Sweden Service Format Inexchange

Adjustments for payment means and registration number.

IMPORTANT

If you have your own formats/adjustments, you can still use them. Select your format in Setup.

Countries/Regions



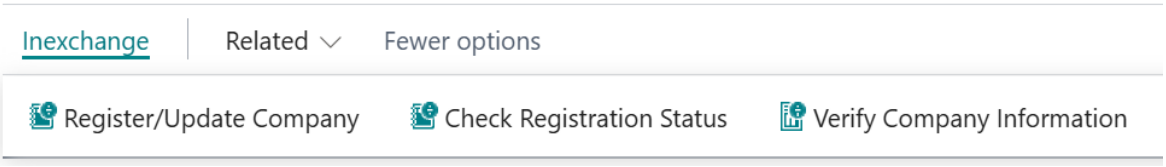
Code	Name	ISO Code	ISO Numeric Code	Address Format	Contact Address Format	County Name	EU Country/Re... Code	Intrastat Code	VAT Scheme
SE	Sverige	SE	752	Post Code+...	After Comp...		SE	SE	0007
SG	Singapore	SG	702	City+Post C...	After Comp...				

Countries/Regions page.

Remember to set “VAT Scheme” code for the countries you will send invoices to. The “VAT Scheme” is used in the PEPPOL format.

8 Company Information

Use the Inexchange actions on Company Information to register, update, and verify the company.



Available actions

- Register/Update Company: registers or updates your company in Inexchange.
- Check Registration Status: retrieves the current registration status.
- Verify Company Information: retrieves company information from Inexchange.

BEFORE SENDING

Company information must be correct and verified before electronic documents can be sent.

After registration, the Company ID and status appear under the Inexchange section at the bottom of the Company Information page.

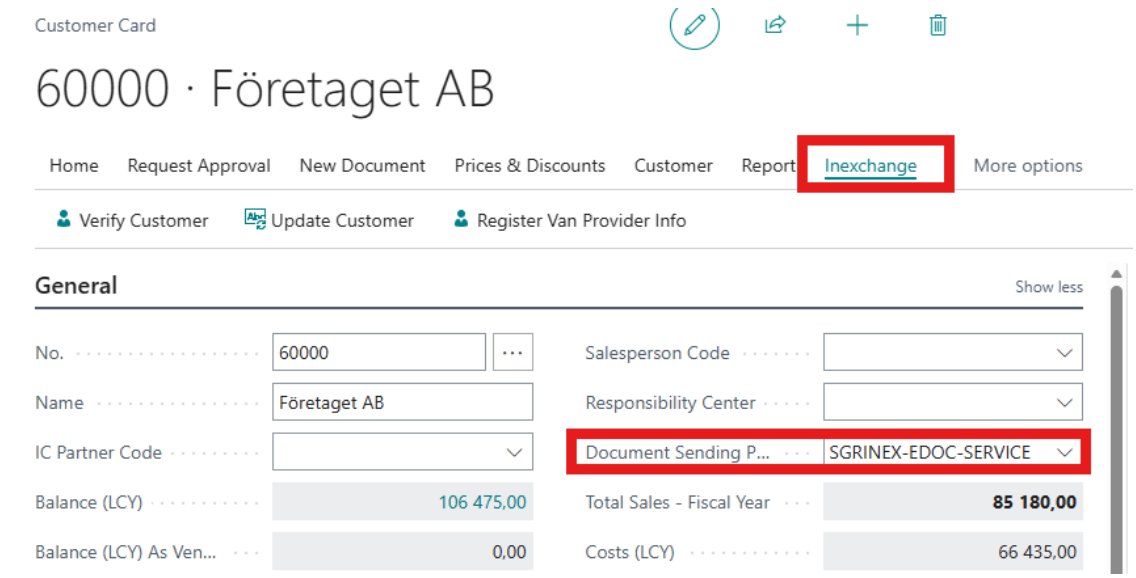


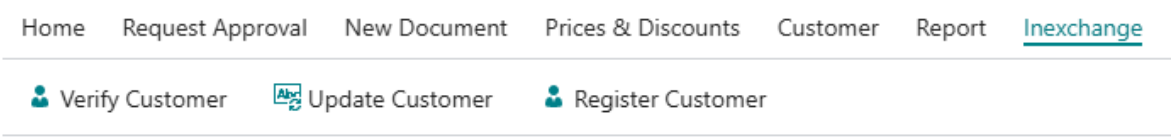
PEPPOL option

“Use Giro as Payment Means” enables Giro instead of IBAN or bank account details in the PEPPOL document.

9 Customer

Assign the Inexchange document sending profile to customers who should receive electronic invoices.

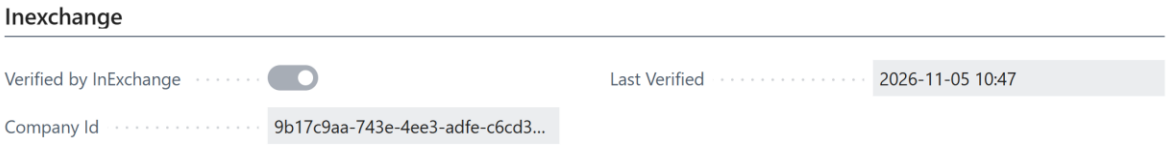




Use the Inexchange menu to verify, update, or register the customer.

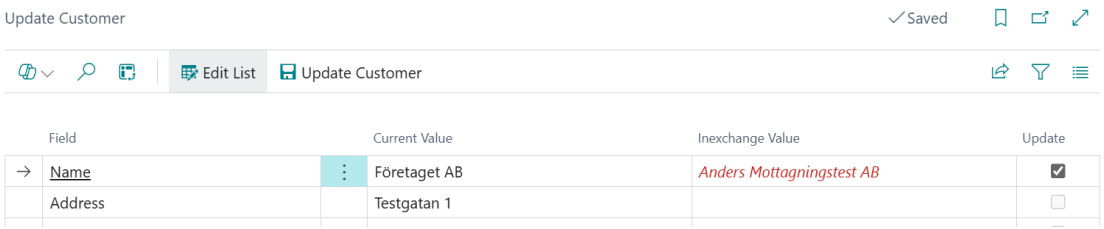
- Verify Customer: retrieves customer details from Inexchange and marks the customer as verified. Verification is required before sending an invoice.
- Update Customer: compares Business Central values with Inexchange information and lets you select which fields to update.
- Register Customer: registers a customer that is not yet available in the Inexchange network.

After verification, the verification status, Company ID, and verification time appear under the Inexchange section.



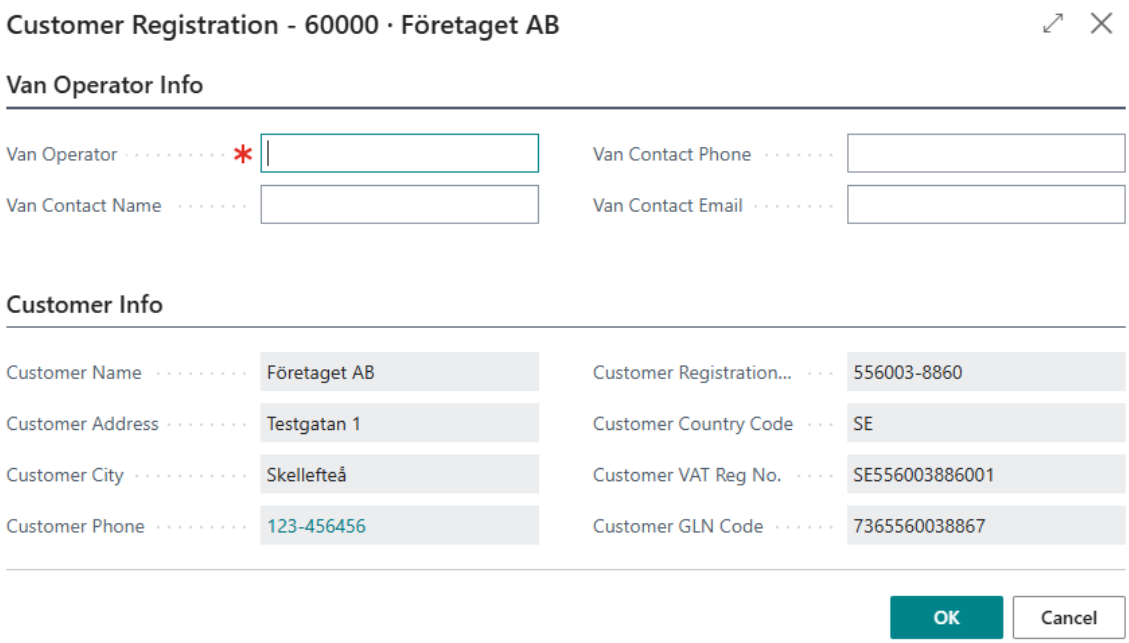
9.1 Update Customer

Review the current Business Central value and the value returned by Inexchange. Select the fields to update, then choose “Update Customer”. Fields without an Inexchange value, or fields that already match, cannot be selected.



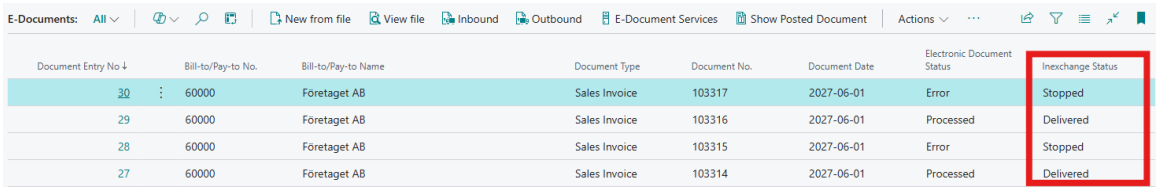
9.2 Register Customer

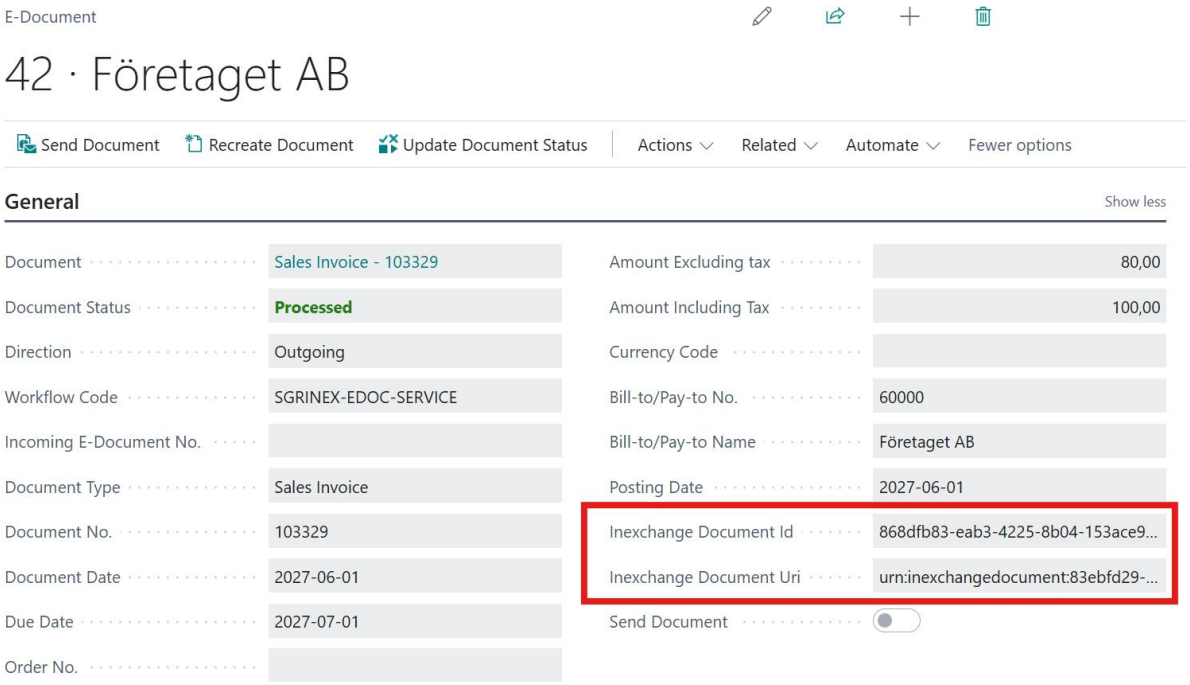
Complete the VAN provider contact details and review the customer information. Select OK to submit the registration to Inexchange. VAN Operator is a mandatory field to be able to register a customer.



10 E-Document

Posted sales invoices and credit memos can be tracked from the E-Documents page. The list includes documents that are waiting to be sent and documents already sent.



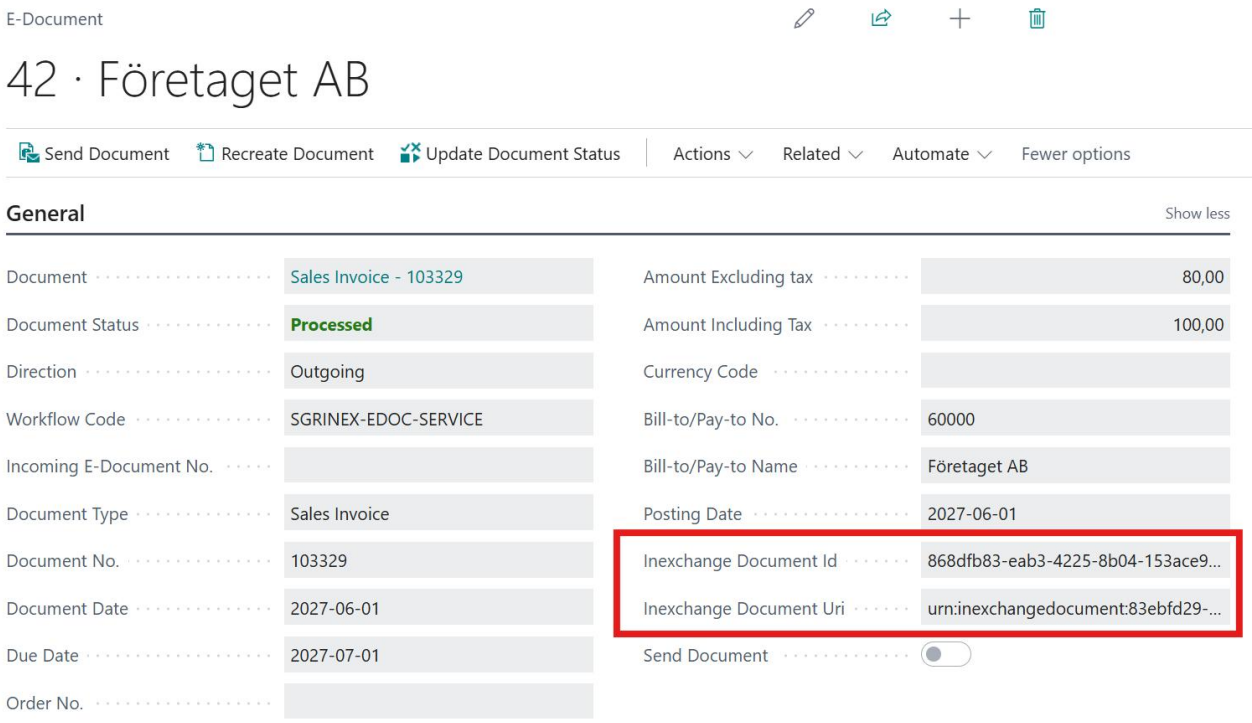


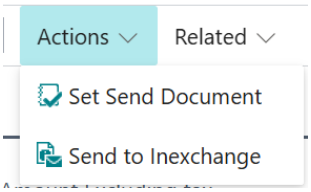
Inexchange statuses

Status	Meaning
Not sent	The document has not been sent.
Pending	The document has been sent from Business Central.
Pending in platform	Inexchange is processing the document.
Delivered	The document was delivered successfully.
Error	An error occurred during transmission.

10.1 E-Document Card

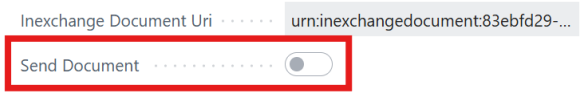
The E-Document Card contains document details and Inexchange references. These references are useful when **contacting support**.





Use Actions to mark and send a document manually.

1 If the document has not been sent, choose Actions > Set Send Document to set the "Send Document" toggle



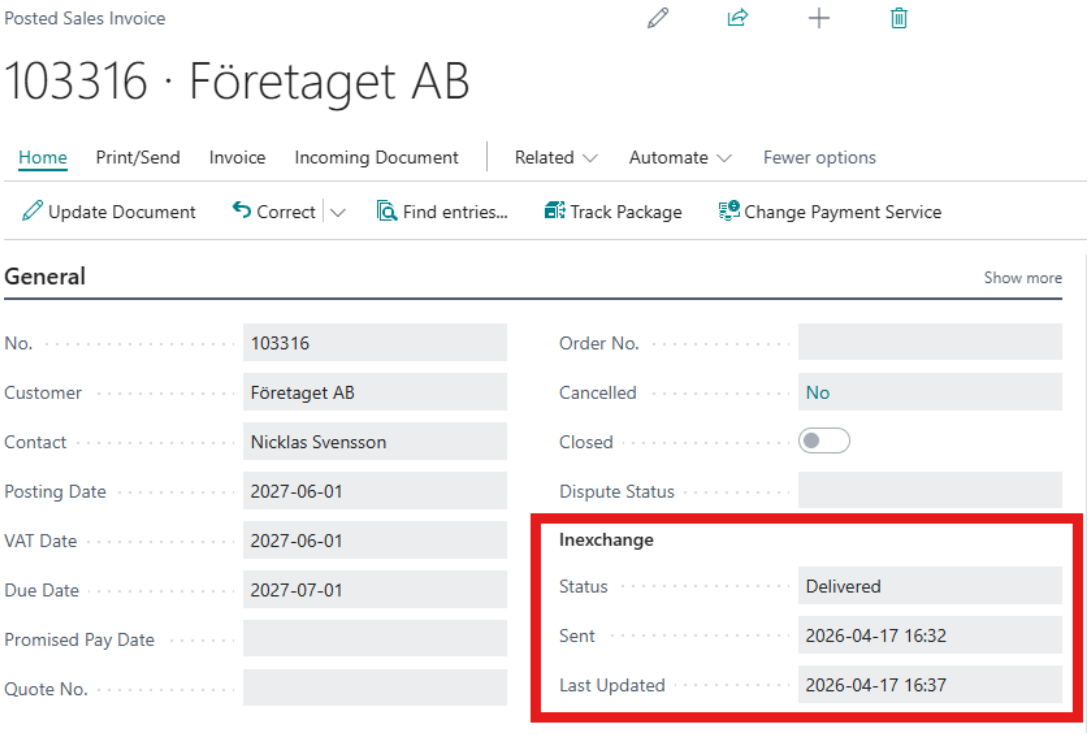
2 Verify that the Send Document toggle is enabled.

3 Choose Send to Inexchange or Send Document.

4 If you send manually via, Send to Inexchange, choose Update Document Status to retrieve the latest status.

11 Posted Sales/Service Documents

Posted sales and service documents show the Inexchange status, sent date, and last updated date on the document card.



12 Support

SHERPAS SUPPORT

For support with the Inexchange E-Document Connector, contact inexchange_bc@sherpas.se. Include the Business Central environment, company name, document number, and Inexchange Document ID when available.