DATEV Export Pro Extension

PDF Manual

MODULE

datev

LAST UPDATED

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OSS Export

DATEV Export Pro Extension · /datev/features/oss-export

Use the OSS export to generate VAT summary CSV files for OSS/IOSS reporting periods directly from Magento admin.

Access

- **Export screen:** `Sales > DATEV > DATEV OSS Export`
- **Configuration:** `Stores > Configuration > MageB2B > DATEV Export Pro > OSS Export Settings`

Prerequisites

Before using OSS export, ensure:

- **Enable OSS Export** is set to `Yes`
- **Member State of Identification** is configured
- EU country list is configured in Magento (`general/country/eu_countries`)

If you use IOSS:

- **Enable IOSS** is set to `Yes`
- IOSS-related order attribute settings are configured

OSS Export Settings (Configuration)

Key settings in **OSS Export Settings**:

- `Enable OSS Export`
- `Default Scheme` (`Union OSS`, `Non-Union OSS`, `IOSS`)
- `Default Period Type` (`Quarter`, `Month`)
- `Default Currency Mode` (`EUR only`, `ECB rate at period end`)
- `Member State of Identification`
- `B2B Detection` and optional B2B tax class/customer group filters
- Optional VIES settings (VAT source, API URL, requester data, cache days)

These settings control how transactions are classified and aggregated for OSS output.

Export Form Fields

On `Sales > DATEV > DATEV OSS Export`, you can set:

- `OSS Scheme`: `union`, `non_union`, or `ioss`
- `Period Type`: `quarter` or `month`
- `Year`
- `Quarter` or `Month` (depending on period type)
- `Store` (optional)
- `Currency Mode`: `eur` or `ecb`

Actions: Preview, Export, Send

The OSS page provides three actions:

1. `Preview` Shows the calculated dataset in the admin before generating a file.

2. `Export` Downloads the OSS CSV file immediately.

3. `Send` Creates a ZIP with the CSV and sends it to the configured tax advisor e-mail.

Output Files

CSV export filename pattern:

- `oss_export_<scheme>_<period_key>_<timestamp>.csv`

CSV structure:

- `Scheme`
- `Period`
- `Member State`
- `Tax Rate`
- `Net Amount`
- `Tax Amount`
- `Currency`

When using **Send**, the module creates a ZIP in:

- `var/export/datev/oss/`

OSS exports are CSV-based and do not include PDF documents or master data attachments.

E-mail Sending (Tax Advisor)

The **Send** action depends on general e-mail settings in:

- `Stores > Configuration > MageB2B > DATEV Export Pro > Email Settings (DATEV + OSS)`

Required for successful send:

- E-mail feature enabled
- Tax advisor e-mail address configured

Common Issues

OSS export disabled

Enable `OSS Export Settings > Enable OSS Export`.

Missing member state / EU country setup

Set `Member State of Identification` and verify EU country configuration.

IOSS not available

Enable IOSS and complete IOSS attribute settings.

Send action fails

Verify e-mail settings and tax advisor e-mail address.

Empty result

Check selected period, store filter, and classification settings (B2B/VIES/IOSS).