E-Invoice Documentation

Complete PDF Manual

Guide for Magento administrators, technical project owners, and implementation teams.

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EXTENSION
Magento 2 Extension E-Invoice

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E-Invoice

SoftwareSilo E-Invoice turns Magento invoices and credit memos into structured electronic documents. It can generate hybrid PDF/XML files for ZUGFeRD and Factur-X, or XML-only documents for XRechnung, EN 16931 and PEPPOL BIS Billing 3.0.

The extension creates, validates, stores and distributes files from Magento. It does not submit them to a PEPPOL access point, government portal or recipient network on its own.

Choose the output your recipient expects

Format	Output	Typical use
ZUGFeRD 2.5	PDF with embedded CII XML, plus separate XML when stored	German and cross-border B2B invoicing where people and accounting systems use the same document
Factur-X 1.09	PDF with embedded CII XML, plus separate XML when stored	French and cross-border B2B invoicing
XRechnung 2.2, 2.3 or 3.0	CII XML	German recipients that explicitly request XRechnung
EN 16931	CII XML	European workflows built around the EN 16931 semantic model
PEPPOL BIS Billing 3.0	UBL XML	Documents that will be passed to a separate PEPPOL delivery service

Invoices and credit memos use the same store-level default format. All five formats are available for both document types. Credit-memo generation has its own enable switch, trigger, processing mode and email settings.

A sensible first setup

1. Install the package.
2. Complete seller, payment and tax details under **Stores > Configuration > MageB2B > E-Invoice**.
3. Select the format required by the recipient rather than the format with the most features.
4. Start with manual generation on a non-production store view.
5. Generate one representative invoice and, if refunds matter, one credit memo.
6. Inspect the XML, run validation and have the intended receiver or integration partner test the actual file.
7. Only then enable email attachments, queue processing or scheduled batches.

Use the Configuration Guide for field-by-field guidance and the Go-Live Checklist before enabling automatic delivery.

What the extension handles

- manual, immediate, queued and scheduled generation workflows;
- separate invoice and credit-memo processing;
- store-view-specific configuration;
- hybrid PDF/XML creation for ZUGFeRD and Factur-X;
- XML generation for XRechnung, EN 16931 and PEPPOL BIS;
- VAT-category, exemption-reason, payment-term and accounting-reference mapping;
- permanent or on-demand file generation;
- optional email attachments;
- status, error and generated-at information in Magento Admin;
- admin actions, mass actions, REST endpoints and CLI commands;
- optional customer downloads in the account area (invoice XML/PDF/ZIP, credit-memo XML/PDF);
- a native checkout field for the buyer reference / Leitweg-ID;
- configurable B2G (public sector) detection with a dedicated format and a mandatory Leitweg-ID.

Understand the boundary

- Schema validation checks document structure. It does not guarantee that a specific customer, portal or access point will accept the file.
- XRechnung generation does not upload the file to ZRE, OZG-RE or another portal.
- PEPPOL BIS generation creates UBL. Network addressing, participant registration and transmission belong to your PEPPOL provider or integration.
- A fallback buyer reference can make a file structurally complete while still being wrong for the receiver. Use the real procurement reference whenever one is required.
- Accounting and tax settings should be reviewed by the people responsible for your invoicing process.

Terms you will meet

- **CII** and **UBL** are the two XML syntaxes e-invoices use. ZUGFeRD, Factur-X, XRechnung and EN 16931 are CII-based; PEPPOL BIS is UBL-based.
- **ZUGFeRD** (German) and **Factur-X** (French) are hybrid formats: a normal PDF with the XML embedded, so people and software read the same file.
- **XRechnung** is the German standard for invoices to public-sector recipients; **EN 16931** is the European semantic model behind these formats.
- **PEPPOL** is a delivery network with its own document rules; this module creates the

files, an access point delivers them.

- **Leitweg-ID** is a routing reference German public-sector recipients assign to their suppliers.
- **EAS** codes identify the kind of electronic address a PEPPOL participant uses.
- **BT/BG/BR** numbers refer to the EN 16931 business terms, groups and rules used throughout the configuration screens.

Documentation map

- Generation Modes and Triggers
- Admin Workflows
- Queue and Cron Operations
- B2G / Public Sector Detection
- Document Storage, Email and Downloads
- Document Data Mapping
- Status Tracking
- VAT Classification
- Seller Identity
- REST API
- CLI Commands
- Lifecycle Events
- Troubleshooting
- Frequently Asked Questions

Requirements

- Magento 2.4
- PHP `8.1` or newer within the range supported by your Magento release
- Composer 2
- Magento cron for scheduled generation and stale-claim recovery
- a running message-queue consumer when queue mode is selected

Installation

Install the module, confirm its dependencies, then test one document manually before enabling automatic generation or email attachments.

Requirements

- Magento 2.4
- PHP `8.1` or newer within the PHP versions supported by your Magento release
- Composer 2
- a valid SoftwareSilo Composer repository credential
- Magento cron for scheduled generation and stale-claim recovery
- supervised queue consumers when message-queue mode is used

The package requires `horstoeko/zugferd` and `num-num/ubl-invoice`. Composer installs compatible versions automatically.

Install the package

Run from the Magento project root:

```
composer require mageb2b/e-invoice
php bin/magento module:enable MageB2B_ExtensionManager
MageB2B_EInvoice
php bin/magento setup:upgrade
php bin/magento setup:di:compile
php bin/magento cache:clean
```

Deploy static content if your release process requires it:

```
php bin/magento setup:static-content:deploy -f
```

The Composer package name is `mageb2b/e-invoice`. Do not use the older `mageb2b/einvoice` spelling found in historical notes.

Confirm the installation

```
composer show mageb2b/e-invoice
php bin/magento module:status MageB2B_EInvoice
```

The Magento command should report that `MageB2B_EInvoice` is enabled. Use the package metadata recorded in `composer.lock` when checking compatibility.

Confirm the database and admin UI

After `setup:upgrade`:

1. Open **Stores > Configuration > MageB2B > E-Invoice**.
2. Open **Sales > Invoices** and confirm the **E-Invoice Status** column, **Generate E-Invoice** mass action and **Download E-Invoices (ZIP)** mass action are available to an authorized admin role.
3. Open **Sales > Credit Memos** and confirm the **E-Invoice Status** column plus the **Generate E-Invoice** and **Download E-Invoices (ZIP)** mass actions appear when credit-memo support is enabled.
4. Open one invoice and one credit memo. Confirm that each detail page contains its own E-Invoice Information block when the corresponding feature is enabled.

The module stores status, format, paths, timestamps and error information on invoice and credit-memo entities. Both grids expose an **E-Invoice Status** column and a **Download E-Invoices (ZIP)** mass action that bundles the selected records' available files. The module does not create a separate invoice ledger.

Check required PHP capabilities

The generators and validators rely on XML processing, file access and PDF handling. Confirm at least:

```
php -m | grep -E 'dom|libxml|zlib'
```

Also confirm Magento can write to its private `var/` directory if you plan to use permanent storage.

Prepare background processing

Magento cron is required for scheduled mode and for stale-claim recovery. Queue mode additionally requires the matching consumer:

```
php bin/magento queue:consumers:start mageb2b.einvoice.generate
php bin/magento queue:consumers:start
mageb2b.einvoice.generate.creditmemo
```

Do not start long-running consumers manually in a terminal for production. Add them to your existing process supervisor.

First safe verification

1. Leave **Enable E-Invoicing** off while entering seller and payment data.
2. Save values in the exact store view you intend to test.

3. Run **Test Configuration**, **Test XSD Schemas** and **Test Company Data**.
4. Enable the module with invoice generation mode set to **Disabled**.
5. Create a representative invoice, generate its e-invoice from the admin view and inspect the actual XML/PDF.

The test buttons confirm local configuration and schema availability. They do not prove that a recipient or network will accept the document.

Common installation problems

Composer cannot find the package

Verify the configured SoftwareSilo repository and credentials, then check the exact package name:

```
composer show mageb2b/e-invoice --all
```

Avoid a broad `composer update` merely to diagnose one package.

The configuration section is missing

Check module status, rerun `setup:upgrade`, clean configuration cache and confirm the admin role can access `MageB2B_EInvoice` configuration resources.

The invoice status column or mass actions are missing

Confirm setup completed without errors. Check the feature switches and admin ACL: the UI plugins hide the status columns and E-Invoice mass actions when the feature is disabled. Do not expect format or generated-time columns or a mass-validation action; those controls are not declared by the current admin UI.

Files cannot be written

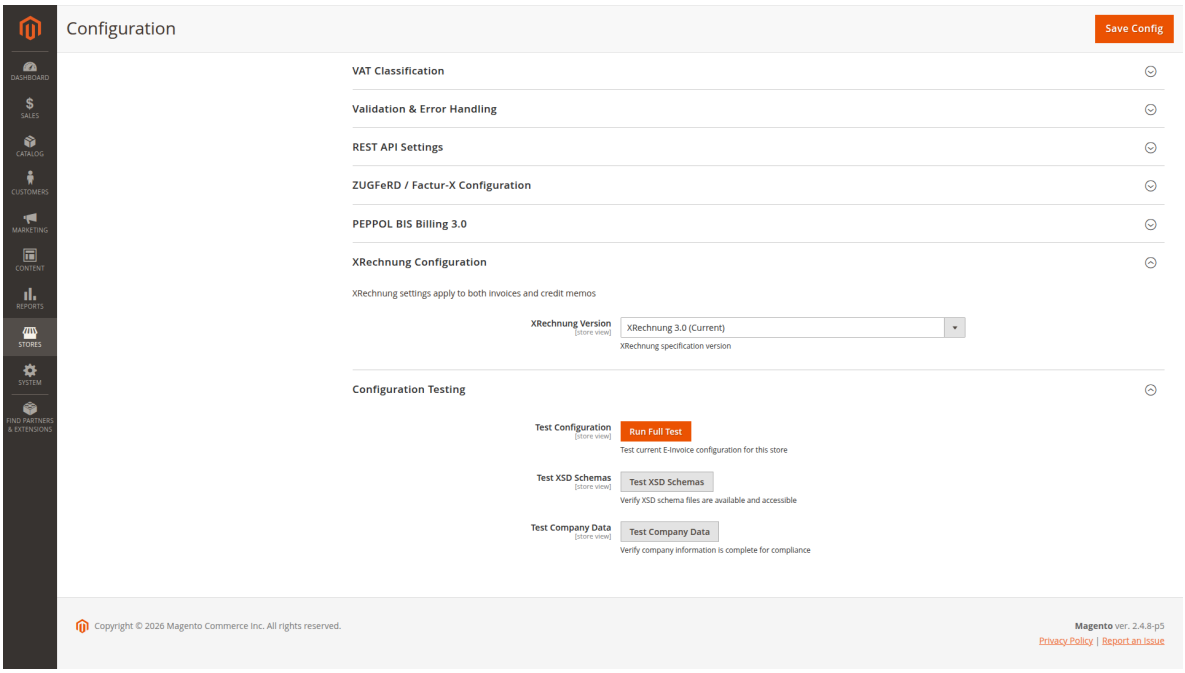
Verify the configured storage path is writable by the PHP process below Magento's private `var/` directory. Do not solve this with world-writable permissions.

Continue with Configuration and the Go-Live Checklist.

Configuration

Open **Stores > Configuration > MageB2B > E-Invoice**. Choose the store view first: the module reads these values at store scope, so a correct default value can still be overridden by an incomplete store-view value.

Configure one output format and one document flow at a time. Start with manual generation, validate a real sample, and add automation only after the result is accepted.



General Settings

Setting	Default	Notes
Enable E-Invoicing	No	Master switch per store view
Default B2B Format	ZUGFeRD	Used for invoices and credit memos in this store view
B2G Format (Public Sector)	(empty)	Format for detected B2G orders; empty falls back to Default B2B Format

Choose the format the recipient expects. The setting does not choose a format per customer, and it does not transmit the file.

B2G / Public Sector (Leitweg-ID)

Controls how orders for public-sector recipients are identified. A detected B2G order is generated with the **B2G Format** and strictly requires a resolvable Buyer Reference / Leitweg-ID (BT-10); generation fails with an error when none can be resolved.

Setting	Default	Notes
B2G Detection Method	Disabled	`disabled`, `order_reference`, `customer_group`, `customer_attribute`
B2G Customer Groups	(empty)	Visible when the method is `customer_group`; guest orders are never detected by group
Leitweg-ID Customer Attribute	(empty)	Visible when the method is `customer_attribute`; a non-empty value marks the recipient as B2G and supplies BT-10 when the order carries none

See B2G / Public Sector Detection for method behavior and setup.

Invoice Settings

Setting	Default	Notes
Generation Mode	Immediate	`disabled`, `immediate`, `queued`, `scheduled`
Generation Trigger	On Invoice Creation	`invoice_create`, `invoice_pay`, `manual_only`
Document Type Code	380	UN/CEFACT invoice document type
Block Invoice on E-Invoice Error	No	Propagates an immediate generation failure, but cannot guarantee rollback after the invoice commit
Attach E-Invoice to Invoice Email	No	Attaches XML/PDF to the invoice email
Attachment Strategy	auto	`auto`, `xml_only`, `pdf_only`, `both`
Scheduled Batch Size	100	Rows per cron run for `scheduled` mode (1–1000)
Recovery Timeout (Minutes)	30	Stale `queued`/`processing` claims are retried after this (5–1440)
Invoice Filename Pattern	`invoice-{invoice_increment_id}-{format}.{type}`	See “Filename Variables”

Credit Memo Settings

Credit memo generation is **disabled by default** and must be enabled per store view.

Setting	Default	Notes
Enable Credit Memo E-Invoicing	No	Required to show actions on credit memo view
Generation Mode	Immediate	Same options as invoices
Generation Trigger	On Credit Memo Creation	`creditmemo_create`, `manual_only`
Document Type Code	381	UN/CEFACT credit memo type
Block Credit Memo on E-Invoice Error	No	Propagates an immediate generation failure; async failures happen after creation
Attach E-Invoice to Credit Memo Email	No	Attaches XML/PDF to the credit memo email
Attachment Strategy	auto	`auto`, `xml_only`, `pdf_only`, `both`
Scheduled Batch Size	100	Rows per cron run for `scheduled` mode (1–1000)
Recovery Timeout (Minutes)	30	Stale `queued`/`processing` claims are retried after this (5–1440)
Credit Memo Filename Pattern	`creditmemo-{creditmemo_increment_id}-{format}.{type}`	See “Filename Variables”

Credit memos use the same **Default B2B Format** as invoices. The supported formatters cover ZUGFeRD, Factur-X, XRechnung, EN 16931 and PEPPOL BIS for both document types.

Document Storage

Setting	Default	Notes
Storage Strategy	Permanent Storage	`permanent` or `on_demand`
File Storage Path	`einvoice`	Relative to Magento's private `var/` directory

Storage locations (default settings):

- Invoices: `var/einvoice/`
- Credit memos: `var/einvoice/creditmemo/`

Files are stored below Magento's private `var/` directory, not in public `pub/media`. They are served to customers and admins through controlled download actions, never through a public URL. To move artifacts written by older module versions from `pub/media`, use `php bin/magento einvoice:storage:migrate-public` (see CLI).

Filename Variables

Use these variables in filename patterns:

Variable	Invoice	Credit Memo
`{invoice_increment_id}`	✓	Alias of credit-memo increment ID
`{creditmemo_increment_id}`	-	✓
`{order_increment_id}`	✓	✓
`{invoice_id}`	Invoice entity ID	Alias of credit-memo entity ID
`{creditmemo_id}`	-	Credit-memo entity ID
`{format}`	✓	✓
`{type}`	✓ (`xml`/`pdf`)	✓ (`xml`/`pdf`)
`{date}`	✓ (`YYYY-MM-DD`)	✓ (`YYYY-MM-DD`)
`{datetime}`	✓ (`YYYY-MM-DD_HH-mm-ss`)	✓ (`YYYY-MM-DD_HH-mm-ss`)

`{order_increment_id}` resolves the parent order's increment ID; the order is only loaded when the pattern uses that token.

Company Information

These values are used for all formats (invoices and credit memos):

Field	Notes
Seller Legal Name (BT-27)	Required. Read strictly from this field — the Magento store name is not used. Existing installations were seeded from the store information name
VAT ID	Required

Field	Notes
Tax Number	Required for German formats
Company Registration Number	HRB/HRA
SIRET Number	Required for Factur-X (France)
Bank IBAN / Bank BIC/SWIFT	Used in payment instructions
Default Payment Terms (Days)	Optional
Seller Contact (Name/Phone/Email)	Required for XRechnung (BR-DE-2)
Seller Trading Name (BT-28)	Optional alternative business name
Seller GLN	Global Location Number (ISO 6523 scheme 0088)
Seller DUNS Number	Dun & Bradstreet identifier (scheme 0060)
Seller Leitweg-ID	Only when the seller itself is a public entity (scheme 0204)

See Seller Identity for details.

Tax Representative

Non-EU sellers with EU VAT obligations can declare a fiscal representative (BG-11 / BT-63). Off by default.

Setting	Notes
Enable Tax Representative	Master switch
Representative Name	Legal entity name
Representative VAT ID	Mandatory when enabled
Street / Postcode / City / Country	Representative's address

VAT Classification

Controls the EN16931 BT-151 category (S / Z / E / AE / K / G / O) emitted per invoice line.

Setting	Default	Notes
Kleinunternehmer (§19 UStG)	No	When enabled, every line is classified as E regardless of tax

Setting	Default	Notes
Default Category for 0% Lines	Z	Used when a 0% line does not match intra-community (K) or export (G) rules
Treat Magento Giftcards as Multi-Purpose Voucher	Yes	Adobe Commerce `giftcard` products → `0`
Voucher Override Product Attribute	(empty)	Product attribute code whose value `multi_purpose` / `single_purpose` overrides detection
Exemption Reason: Intra-Community (K)	Innergemeinschaftliche Lieferung (§4 Nr. 1b UStG)	Override text for BT-120
Exemption Reason: Export (G)	Ausfuhrlieferung (§4 Nr. 1a UStG)	Override text for BT-120
Exemption Reason: Exempt (E)	Kleinunternehmer (§19 UStG)	Override text for BT-120
Exemption Reason: Reverse Charge (AE)	Steuerschuldnerschaft des Leistungsempfängers (§13b UStG)	Override text for BT-120
Exemption Reason: Out of Scope (O)	Mehrzweck-Gutschein (§3 Abs. 15 UStG)	Override text for BT-120

See VAT Classification for the full decision tree.

The intra-community / export rules rely on Magento's built-in EU country list under **Stores > Configuration > General > Countries Options**.

Payment Terms Mapping

Use this section to map payment-method-specific terms and payment means codes.

Setting	Notes
Default Payment Terms Template	Supports `{due_days}`, `{due_date}`, `{invoice_date}`, `{payment_method}`
Default Payment Means Code	Example: `58` (SEPA transfer), `59` (SEPA direct debit)
Default Payment Means Code (No IBAN)	Fallback when no IBAN is configured (example: `1`)

Setting	Notes
Payment Method Mapping	Per-payment-method grid overriding the defaults

Each **Payment Method Mapping** row provides the columns *Payment Method*, *Payment Terms Template*, *Terms Days*, *Payment Means Code*, *Settlement Treatment* (`Standard / unpaid`, `Document-specific prepayment`, `Paid with settlement evidence`), *IBAN Override* and *BIC Override*. Empty cells inherit the section defaults and company bank data. See Document Data Mapping.

Accounting

Use this section to provide line-level accounting references (BT-133).

Setting	Notes
Accounting Source Type	`none`, `order_item_field`, `product_attribute`, `customer_attribute`
Order Item Field	Selectable when source type is `order_item_field`
Product Attribute	Selectable when source type is `product_attribute`
Customer Attribute	Selectable when source type is `customer_attribute`

Document References

Map order data to the buyer/seller reference fields (BT-11, BT-13, BT-14, BT-46, BT-47) that recipients use for internal routing.

Setting	Default	Notes
Project Reference (BT-11)	(empty)	Optional project reference
Purchase Order Reference (BT-13)	`payment:po_number`	Buyer's PO number
Sales Order Reference (BT-14)	`order:increment_id`	Your order number
Buyer Identifier (BT-46) + Scheme	(empty)	Buyer reference and its scheme
Buyer Legal Registration Identifier (BT-47) + Scheme	(empty)	Buyer's legal registration ID
Include Order Customer Note (BT-22)	No	Adds the order's customer note to the document

Prepayments and Redeemed Credit

Setting	Notes
Invoice Prepaid Amount Field (BT-113)	Which document field carries the already-paid amount
Credit Memo Prepaid Amount Field (BT-113)	Same for credit memos

Invoice Items

Setting	Default	Notes
Include Configurable Product Options (BT-154)	Yes	Adds the chosen options to the line
Use Selected Simple Product Name (BT-153)	No	Uses the child product's name instead of the configurable's
Default Item Unit Code	H87	UN/ECE unit code (H87 = pieces) used when no product unit is set

Native Checkout Buyer Reference

Lets the buyer enter a **Buyer Reference / Leitweg-ID** during checkout, stored on the order and written into the e-invoice.

Setting	Default	Notes
Buyer Reference / Leitweg-ID	Disabled	Enables the checkout field
Checkout Field Label	Buyer Reference / Leitweg-ID	Visible label
Checkout Help Text	(short explanation)	Shown below the field
Maximum Length	50	Input limit

Delivery and Service Date

Setting	Default	Notes
Delivery / Service Date Source	`invoice_date`	Which date is emitted as the delivery/service date

Customer Account Downloads

Controls which generated documents the customer can download in their account area. All five are **disabled by default**; enable each download type deliberately per store view.

Setting	Default	Notes
Invoice XML	No	XML download on the invoice page
Invoice PDF	No	PDF download (hybrid documents)
Invoice XML ZIP	No	Multi-document ZIP download
Credit Memo XML	No	XML download on the credit-memo page
Credit Memo PDF	No	PDF download for credit memos

Validation & Error Handling

Setting	Default	Notes
Validation Level	Standard	`minimal`, `standard`, `strict`
Strict XSD Validation	No	Enables strict schema validation
Enable Error Notifications	No	Sends emails on failures
Error Notification Email	(empty)	Required when notifications are enabled
Error Notification Threshold	3	Consecutive failures before sending

There is no automatic retry of `error` documents: the cron worker only recovers stale `queued`/`processing` claims (see Recovery Timeout). Retrying a failed document is a deliberate manual action — the detail-page **Generate E-Invoice** button applies `force` automatically for `error` rows.

REST API Settings

Setting	Default	Notes
Include E-Invoice in Invoice API	No	Adds `einvoice_xml` and `einvoice_pdf` to `GET /V1/invoices/{id}`
Include E-Invoice in Credit Memo API	No	Adds `einvoice_xml` and `einvoice_pdf` to `GET /V1/creditmemos/{id}`

See: REST API

ZUGFeRD / Factur-X Configuration

Setting	Notes
ZUGFeRD Profile	Applies to invoices and credit memos

PEPPOL BIS Billing 3.0

Settings for UBL-based PEPPOL delivery. Applied when **Default B2B Format** is PEPPOL BIS.

Setting	Notes
Seller Endpoint Scheme (EAS)	70+ PEPPOL codes (9930 DE VAT, 0088 GLN, 9914 AT VAT, 0204 Leitweg-ID, ...)
Seller Endpoint ID	Identifier matching the selected scheme
CustomizationID override	Leave empty for PEPPOL BIS Billing 3.0 default
ProfileID override	Leave empty for `billing:01:1.0` default

See PEPPOL BIS Billing 3.0.

XRechnung Configuration

Setting	Default	Notes
XRechnung Version	3.0	`2.2`, `2.3`, `3.0`

Configuration Testing

Use the built-in buttons:

- **Test Configuration**
- **Test XSD Schemas**
- **Test Company Data**

These checks are local diagnostics. They do not replace recipient testing, PEPPOL business-rule validation or government-portal validation.

Current behavior to plan for

- **Block Invoice on E-Invoice Error** runs after Magento commits the invoice. It can surface an immediate error but cannot guarantee that no Magento invoice exists.
- Factur-X invoice activation follows **Default B2B Format**. Select Factur-X there and

save the same store view; no hidden enabled-formats setting is required.

See Generation Modes and Triggers for the operational impact.

System Configuration Reference

Generated from the module `etc/adminhtml/system.xml` files so the KB matches the Magento admin configuration structure.

`e-invoice`

E-Invoice / General Settings (`einvoice/general/*`)

Config path	Admin label	Type
`einvoice/general/enabled`	Enable E-Invoicing	`select`
`einvoice/general/default_format`	Default B2B Format	`select`
`einvoice/general/b2g_format`	B2G Format (Public Sector)	`select`

E-Invoice / B2G / Public Sector (Leitweg-ID) (`einvoice/b2g/*`)

Config path	Admin label	Type
`einvoice/b2g/detection_method`	B2G Detection Method	`select`
`einvoice/b2g/customer_groups`	B2G Customer Groups	`multiselect`
`einvoice/b2g/leitweg_attribute`	Leitweg-ID Customer Attribute	`select`

E-Invoice / Invoice Settings (`einvoice/invoice_settings/*`)

Config path	Admin label	Type
`einvoice/invoice_settings/generation_mode`	Generation Mode	`select`
`einvoice/invoice_settings/generation_trigger`	Generation Trigger	`select`
`einvoice/invoice_settings/document_type`	Document Type Code	`select`
`einvoice/invoice_settings/block_on_error`	Block Invoice on E-Invoice Error	`select`

Config path	Admin label	Type
einvoice/invoice_settings/attach_to_email	Attach E-Invoice to Invoice Email	select
einvoice/invoice_settings/attachment_strategy	Attachment Strategy	select
einvoice/invoice_settings/scheduled_batch_size	Scheduled Batch Size	text
einvoice/invoice_settings/recovery_timeout_minutes	Recovery Timeout (Minutes)	text
einvoice/invoice_settings/filename_pattern	Invoice Filename Pattern	text

E-Invoice / Payment Terms Mapping (einvoice/payment_terms/*)

Config path	Admin label	Type
einvoice/payment_terms/default_terms_template	Default Payment Terms Template	textarea
einvoice/payment_terms/default_payment_means_code	Default Payment Means Code	text
einvoice/payment_terms/default_payment_means_code_no_iban	Default Payment Means Code (No IBAN)	text
einvoice/payment_terms/mapping	Payment Method Mapping	custom

E-Invoice / Accounting (einvoice/accounting/*)

Config path	Admin label	Type
einvoice/accounting/source_type	Accounting Source Type	select
einvoice/accounting/order_item_field	Order Item Field	select
einvoice/accounting/product_attribute	Product Attribute	select

Config path	Admin label	Type
einvoice/accounting/customer_attribute	Customer Attribute	select

E-Invoice / Credit Memo Settings (einvoice/creditmemo_settings/*)

Config path	Admin label	Type
einvoice/creditmemo_settings/enabled	Enable E-Invoice for Credit Memos	select
einvoice/creditmemo_settings/generation_mode	Generation Mode	select
einvoice/creditmemo_settings/generation_trigger	Generation Trigger	select
einvoice/creditmemo_settings/document_type	Document Type Code	select
einvoice/creditmemo_settings/block_on_error	Block Credit Memo on E-Invoice Error	select
einvoice/creditmemo_settings/attach_to_email	Attach E-Invoice to Credit Memo Email	select
einvoice/creditmemo_settings/attachment_strategy	Attachment Strategy	select
einvoice/creditmemo_settings/scheduled_batch_size	Scheduled Batch Size	text
einvoice/creditmemo_settings/recovery_timeout_minutes	Recovery Timeout (Minutes)	text
einvoice/creditmemo_settings/filename_pattern	Credit Memo Filename Pattern	text

E-Invoice / Document Storage (einvoice/storage/*)

Config path	Admin label	Type
einvoice/storage/storage_strategy	Storage Strategy	select

Config path	Admin label	Type
einvoice/storage/file_storage_path	File Storage Path	text

E-Invoice / Company Information (einvoice/company/*)

Config path	Admin label	Type
einvoice/company/seller_legal_name	Seller Legal Name	text
einvoice/company/vat_id	VAT ID	text
einvoice/company/tax_number	Tax Number	text
einvoice/company/registration_number	Company Registration Number	text
einvoice/company/registration_scheme	Company Registration Scheme	select
einvoice/company/siret_number	SIRET Number	text
einvoice/company/bank_iban	Bank IBAN	text
einvoice/company/bank_bic	Bank BIC/SWIFT	text
einvoice/company/payment_terms_days	Default Payment Terms (Days)	text
einvoice/company/seller_contact_name	Seller Contact Name	text
einvoice/company/seller_contact_department	Seller Contact Department	text
einvoice/company/seller_contact_phone	Seller Contact Phone	text
einvoice/company/seller_contact_email	Seller Contact Email	text
einvoice/company/seller_trading_name	Seller Trading Name	text
einvoice/company/seller_gln	Seller GLN	text
einvoice/company/seller_duns	Seller DUNS Number	text
einvoice/company/seller_leitweg_id	Seller Leitweg-ID	text

E-Invoice / Tax Representative (`einvoice/tax_representative/*`)

Config path	Admin label	Type
`einvoice/tax_representative/enabled`	Enable Tax Representative	`select`
`einvoice/tax_representative/name`	Representative Name	`text`
`einvoice/tax_representative/vat_id`	Representative VAT ID	`text`
`einvoice/tax_representative/street`	Street	`text`
`einvoice/tax_representative/postcode`	Postcode	`text`
`einvoice/tax_representative/city`	City	`text`
`einvoice/tax_representative/country`	Country	`select`

E-Invoice / VAT Classification (`einvoice/vat/*`)

Config path	Admin label	Type
`einvoice/vat/kleinunternehmer`	Kleinunternehmer (§19 UStG)	`select`
`einvoice/vat/default_zero_rate_category`	Default Category for 0% Lines	`select`
`einvoice/vat/giftcard_multi_purpose`	Treat Magento Giftcards as Multi-Purpose Voucher	`select`
`einvoice/vat/voucher_product_attribute`	Voucher Override Product Attribute	`text`
`einvoice/vat/exemption_reason_k`	Exemption Reason: Intra-Community (K)	`text`
`einvoice/vat/exemption_reason_g`	Exemption Reason: Export (G)	`text`
`einvoice/vat/exemption_reason_e`	Exemption Reason: Exempt (E)	`text`
`einvoice/vat/exemption_reason_ae`	Exemption Reason: Reverse Charge (AE)	`text`
`einvoice/vat/exemption_reason_o`	Exemption Reason: Out of Scope (O)	`text`

E-Invoice / Document References (`einvoice/references/*`)

Config path	Admin label	Type
`einvoice/references/project_reference`	Project Reference (BT-11)	`select`
`einvoice/references/buyer_order_reference`	Purchase Order Reference (BT-13)	`select`
`einvoice/references/seller_order_reference`	Sales Order Reference (BT-14)	`select`
`einvoice/references/buyer_identifier`	Buyer Identifier (BT-46)	`select`
`einvoice/references/buyer_identifier_scheme`	Buyer Identifier Scheme	`select`
`einvoice/references/buyer_legal_registration_identifier`	Buyer Legal Registration Identifier (BT-47)	`select`
`einvoice/references/buyer_legal_registration_identifier_scheme`	Buyer Legal Registration Scheme	`select`
`einvoice/references/include_order_customer_note`	Include Order Customer Note (BT-22)	`select`

E-Invoice / Prepayments and Redeemed Credit (`einvoice/prepayment/*`)

Config path	Admin label	Type
`einvoice/prepayment/invoice_amount_field`	Invoice Prepaid Amount Field (BT-113)	`select`
`einvoice/prepayment/creditmemo_amount_field`	Credit Memo Prepaid Amount Field (BT-113)	`select`

E-Invoice / Invoice Items (`einvoice/item/*`)

Config path	Admin label	Type
einvoice/item/include_configurable_options	Include Configurable Product Options (BT-154)	select
einvoice/item/use_simple_product_name	Use Selected Simple Product Name (BT-153)	select
einvoice/item/default_unit_code	Default Item Unit Code	select

E-Invoice / Native Checkout Buyer Reference (einvoice/checkout/*)

Config path	Admin label	Type
einvoice/checkout/buyer_reference_mode	Buyer Reference / Leitweg-ID	select
einvoice/checkout/buyer_reference_label	Checkout Field Label	text
einvoice/checkout/buyer_reference_help	Checkout Help Text	text
einvoice/checkout/buyer_reference_max_length	Maximum Length	text

E-Invoice / Delivery and Service Date (einvoice/delivery/*)

Config path	Admin label	Type
einvoice/delivery/source	Delivery / Service Date Source	select

E-Invoice / Customer Account Downloads (einvoice/customer_download/*)

Config path	Admin label	Type
einvoice/customer_download/invoice_xml	Invoice XML	select
einvoice/customer_download/invoice_pdf	Invoice PDF	select
einvoice/customer_download/invoice_zip	Invoice XML ZIP	select
einvoice/customer_download/creditmemo_xml	Credit Memo XML	select
einvoice/customer_download/creditmemo_pdf	Credit Memo PDF	select

E-Invoice / Validation & Error Handling (`einvoice/validation/*`)

Config path	Admin label	Type
`einvoice/validation/validation_level`	Validation Level	`select`
`einvoice/validation/strict_xsd_validation`	Strict XSD Validation	`select`
`einvoice/validation/error_notification_enabled`	Enable Error Notifications	`select`
`einvoice/validation/error_notification_email`	Error Notification Email	`text`
`einvoice/validation/error_notification_threshold`	Error Notification Threshold	`text`

E-Invoice / REST API Settings (`einvoice/api/*`)

Config path	Admin label	Type
`einvoice/api/invoice_enabled`	Include E-Invoice in Invoice API	`select`
`einvoice/api/creditmemo_enabled`	Include E-Invoice in Credit Memo API	`select`

E-Invoice / ZUGFeRD / Factur-X Configuration (`einvoice/zugferd_config/*`)

Config path	Admin label	Type
`einvoice/zugferd_config/profile`	ZUGFeRD / Factur-X Profile	`select`

E-Invoice / PEPPOL BIS Billing 3.0 (`einvoice/peppol_bis/*`)

Config path	Admin label	Type
`einvoice/peppol_bis/seller_endpoint_scheme`	Seller Endpoint Scheme (EAS)	`select`
`einvoice/peppol_bis/seller_endpoint_id`	Seller Endpoint ID	`text`
`einvoice/peppol_bis/customization_id`	CustomizationID override	`text`
`einvoice/peppol_bis/profile_id`	ProfileID override	`text`

E-Invoice / XRechnung Configuration (`einvoice/xrechnung_config/*`)

Config path	Admin label	Type
`einvoice/xrechnung_config/version`	XRechnung Version	`select`

E-Invoice / Configuration Testing (`einvoice/testing/*`)

Config path	Admin label	Type
`einvoice/testing/test_configuration`	Test Configuration	`button`
`einvoice/testing/test_schemas`	Test XSD Schemas	`button`
`einvoice/testing/test_company_data`	Test Company Data	`button`

Generate your first e-invoice

Use one store view and one representative sales document for the first check. Keep automatic processing disabled while finance and the receiving system review the output.

Before you generate

1. Open **Stores > Configuration > MageB2B > E-Invoice** at the store view used by the sample order.
2. Enable e-invoicing and choose the format named in the recipient's contract.
3. Complete seller identity, contact, VAT, payment and bank fields that the selected format requires.
4. Confirm the order has the buyer address, VAT data, procurement reference and payment data needed by the recipient.
5. Use **Test Configuration**, **Test XSD Schemas** and **Test Company Data**. These are local checks, not receiver acceptance.

Invoice workflow

1. Set invoice generation mode to **Disabled - Manual Only** and save the store view.
2. Open **Sales > Invoices**, open the representative invoice and choose **Generate E-Invoice**.
3. Reopen or refresh the invoice detail page and read the E-Invoice Information block.
4. Confirm `generated`, the selected format, generated timestamp and the available XML/PDF paths. If the status is `error`, stop and correct the stored error before retrying.
5. Download XML and, for ZUGFeRD or Factur-X, the hybrid PDF.
6. Choose **Validate E-Invoice** on the invoice detail page and record the local result.
7. Run `einvoice:verify-amounts --file=<path>` for CII totals, then submit the same file to the recipient's nominated validator.

`generated` means Magento completed local document generation and recorded the result. It does not mean that an access point, portal or recipient received or accepted it.

Credit memo workflow

Credit memos are independent:

1. Enable **Credit Memo E-Invoicing** in the sample document's store view.
2. Confirm the document type requested by the receiver: `381` is a credit note, while `384` represents a corrected invoice with negative values.
3. Create a representative partial refund and open it under **Sales > Credit Memos**.
4. Choose **Generate E-Invoice** in the E-Invoice Information block.
5. Confirm the local status, format, timestamp and available downloads, then inspect the

XML or hybrid PDF.

6. Validate the exported file with the appropriate CLI or external validator and compare refund lines, VAT buckets and totals with Magento.

The credit-memo detail page provides generation, download and XML-content actions. It does not provide the invoice detail page's **Validate E-Invoice** action, so do not document or test a credit-memo validation button.

Move to automation

After the sample passes review, choose immediate, queue or cron processing and test the matching worker. Enable invoice and credit-memo email attachments separately. Keep the generated file and receiver response with the finance test record.

Related

- Configuration
- Generation Modes and Triggers
- Document Storage, Email and Downloads

Go-Live Checklist

Use this checklist with the finance team and the integration partner that receives the files. A green Magento status is useful, but the real acceptance test is whether the intended recipient can process the document correctly.

1. Agree on the document contract

- ☐ The recipient confirmed the format, version and profile.
- ☐ You know whether the recipient wants XML, a hybrid PDF, or both.
- ☐ The required buyer reference, purchase-order number or Leitweg-ID has a defined source.
- ☐ PEPPOL projects have a separate access point or delivery integration.
- ☐ Government-portal submission is handled outside this extension.

Do not choose XRechnung or PEPPOL BIS merely because the names sound more official. Use the syntax and transport route the receiver actually supports.

2. Complete seller and payment data

- ☐ Legal company name and postal address are correct in Magento store information.
- ☐ VAT ID and, where needed, tax or registration numbers are correct.
- ☐ Seller contact name, phone and email are populated for XRechnung projects.
- ☐ IBAN, BIC and payment terms match the invoices your finance team sends.
- ☐ Payment-method mappings use the right payment means code and wording.
- ☐ PEPPOL seller endpoint scheme and identifier have been verified by the delivery provider.
- ☐ Fiscal-representative data is enabled only when it genuinely applies.

Run **Test Company Data** after saving the store-view configuration.

3. Check customer and order data

- ☐ Billing company, address, country and VAT ID are available on the order.
- ☐ The buyer reference is captured in the agreed Magento field or integration.
- ☐ PEPPOL buyer endpoint data is available or its VAT-ID fallback is acceptable.
- ☐ Discounts, shipping, refunds, tax-exempt lines and mixed VAT rates are represented in a test order.
- ☐ Voucher or gift-card products are classified deliberately.

4. Generate representative documents

Keep automatic generation off while testing.

1. Generate an invoice manually from **Sales > Invoices**.
2. Download its XML and, for a hybrid format, its PDF.
3. Confirm totals, tax buckets, payment data, references and addresses.
4. Create and generate a partial credit memo if refunds are part of the workflow.
5. Run `php bin/magento einvoice:verify-amounts` against both documents.
6. Validate the files with the receiver or the validation tool they nominate.

Test at least one awkward real-world case, such as a partial refund, a zero-rated item or an order with shipping and a discount.

5. Choose the processing model

- ☐ Manual, immediate, queued or scheduled processing has an owner.
- ☐ Magento cron is healthy for the hourly scheduled worker and stale-claim recovery.
- ☐ Both invoice and credit-memo consumers run if queue mode is used.
- ☐ Scheduled batch sizes fit the available processing window.
- ☐ Failed documents are visible to an operations team.
- ☐ Error-notification recipient and threshold are tested.

Read Generation Modes and Triggers before relying on **On Invoice Payment** or **Block Invoice on E-Invoice Error**; invoice creation and payment are separate observer paths and asynchronous errors cannot roll back a committed sales document.

6. Decide how files leave Magento

- ☐ Permanent versus on-demand storage is understood.
- ☐ The email attachment strategy matches the chosen format.
- ☐ A test email contains exactly the expected attachment or attachments.
- ☐ The enabled customer-account downloads (invoice XML/PDF/ZIP, credit-memo XML/PDF) are tested.
- ☐ Backups and retention cover the configured path below `var/`.
- ☐ PEPPOL or portal delivery is tested separately from file generation.

See Document Storage, Email and Downloads.

7. Activate one store view at a time

Configuration is store-view scoped. Save and test the intended scope rather than assuming a website-level value applies everywhere.

After activation, monitor the **E-Invoice Status** column on both the invoice and credit-memo grids for `error` and for `scheduled`/`queued`/`processing` rows that do not advance. Review the first production documents manually and keep the manual generation path available for recovery.

Stop the launch if

- totals in Magento and XML differ;
- the recipient cannot identify buyer or seller correctly;
- a required procurement reference is replaced by a fallback invoice number;
- the queue or cron does not move `scheduled`/`queued` documents;
- emails are sent before the e-invoice attachment exists;
- a generated file passes XSD but fails the receiver's business rules.

Resolve the cause first. Repeatedly regenerating the same source data will normally produce the same problem.

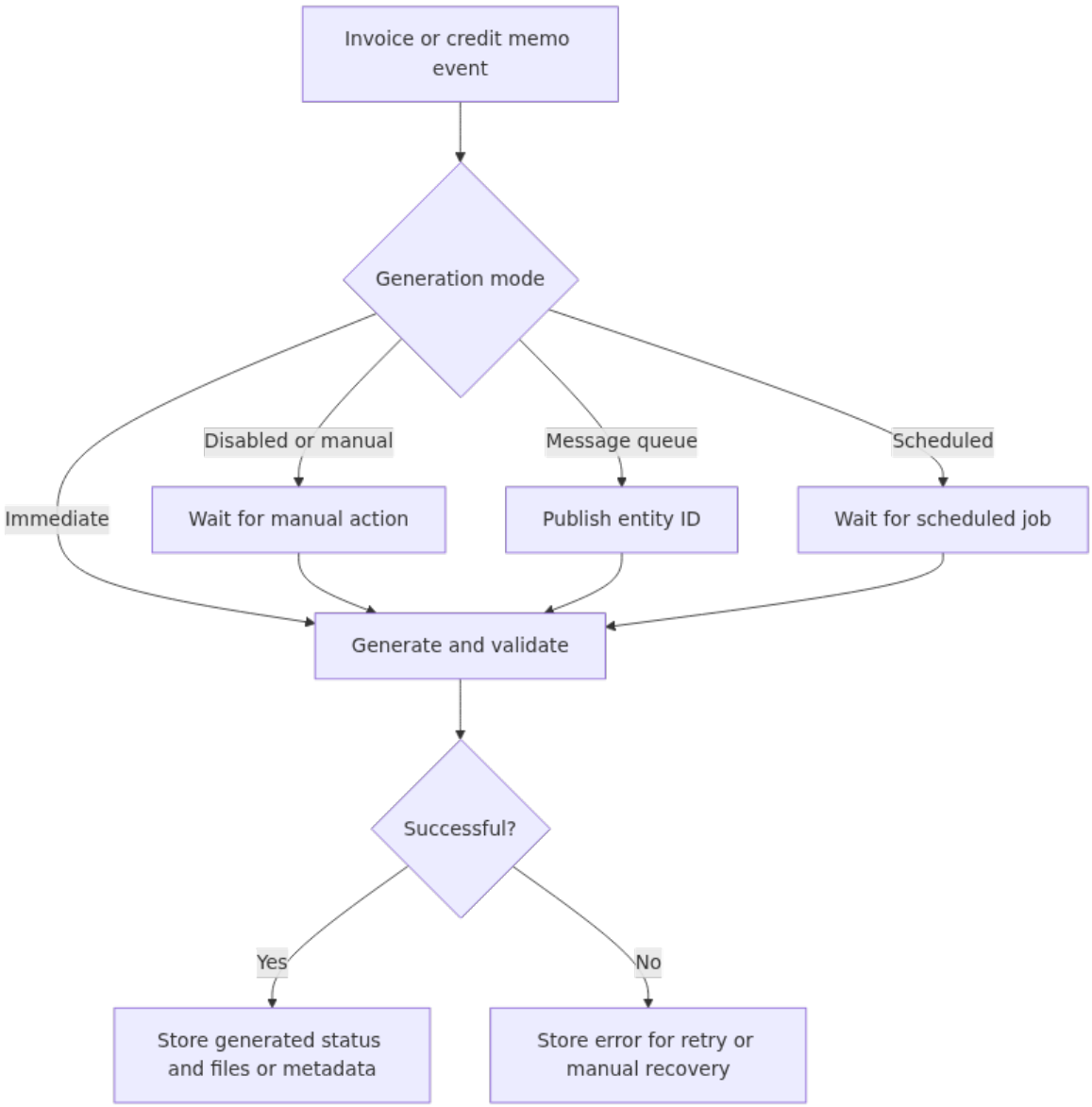
Generation Modes and Triggers

The generation mode answers **how the work runs**. The trigger answers **which sales event is meant to start it**. Configure and test both for invoices and credit memos; they are separate settings.

Generation modes

Mode	What happens after the sales document is saved	Additional service required
Disabled	Automatic processing is disabled and the status becomes `disabled`	No
Immediate	Generation runs in the Magento request	No
Message Queue	The document becomes `queued` and its entity ID is published	Matching queue consumer
Scheduled	The document becomes `scheduled` until the hourly cron worker picks it up	Magento cron

Choose based on failure handling and operational ownership, not just invoice count. Immediate mode gives quick feedback but adds work to invoice creation. Queue mode separates the work cleanly but requires monitored consumers. Scheduled mode is a simple batch workflow but intentionally delays the file.



The scheduled worker

One cron job handles both document flows:

Job	Schedule
`einvoice_process_scheduled`	minute `00` every hour

The job runs in Magento's `default` cron group. For each store it processes up to the flow's **Scheduled Batch Size** (default `100`, allowed range 1–1000) of due `scheduled` rows — invoices and credit memos each have their own setting.

The same worker also performs **stale-claim recovery**: `queued` or `processing` rows that have not finished within the flow's **Recovery Timeout (Minutes)** (default `30`, allowed range 5–1440) are claimed again and reprocessed. This recovery covers interrupted workers; it does not retry documents already marked `error`.

Queue consumers

Queue mode uses two consumers:

```
php bin/magento queue:consumers:start mageb2b.einvoice.generate
php bin/magento queue:consumers:start
mageb2b.einvoice.generate.creditmemo
```

Run them under the same process supervision you use for other Magento consumers. Starting the invoice consumer does not process credit memos.

Generation triggers

Invoice options are:

- **On Invoice Creation**
- **On Invoice Payment**
- **Manual Only**

Credit-memo options are:

- **On Credit Memo Creation**
- **Manual Only**

Trigger behavior

The configured trigger must match the actual sales event, otherwise nothing is scheduled. With **Manual Only**, saving an invoice or credit memo never starts automatic processing — generation is only available through the manual paths below. To stop automatic invoice processing entirely, combine **Manual Only** with generation mode **Disabled**.

Immediate mode

Immediate mode is the easiest workflow to observe:

1. Magento commits the invoice or credit memo.
2. The extension claims the document and sets `processing`.
3. It generates and validates the selected format.
4. Permanent storage writes files; on-demand storage keeps only generation metadata.
5. The status becomes `generated`, or `error` with the last message.

Because invoice generation is attached to an after-commit event, **Block Invoice on E-Invoice Error** cannot safely promise that a failed e-invoice prevents the Magento invoice from existing. It can propagate an immediate failure to the request. It cannot roll back async failures, and an already committed sales entity may remain.

Start with this setting disabled. Treat e-invoice failure as an operational status that must

be recovered, not as a transactional substitute for Magento's invoice lifecycle.

Queue mode

Queue mode stores `queued` with a claim token before publishing a message containing the numeric entity ID, store ID and selected context. The consumer loads the document, generates it and writes `generated` or `error`.

Monitor all three parts:

- `queued` and `processing` rows in the Magento grids;
- consumer process health;
- queue backlog and failed messages in your queue backend.

If a row stays `queued`, confirm that the matching consumer is running before regenerating manually. Rows stuck beyond the flow's **Recovery Timeout** are picked up again by the scheduled worker.

Scheduled mode

The hourly `einvoice_process_scheduled` job processes due `scheduled` rows per store, up to each flow's **Scheduled Batch Size**. It also reclaims `queued`/`processing` rows whose claim is older than the flow's **Recovery Timeout (Minutes)**, so a crashed worker or consumer does not strand documents.

Cron must run frequently enough for Magento to execute the schedule. Running `php bin/magento cron:run --group=default` once is a diagnostic step, not a production scheduler.

Manual generation

Manual generation remains available through:

- **Generate E-Invoice** on the admin invoice or credit-memo view;
- grid mass actions;
- `php bin/magento einvoice:generate`;
- the authenticated REST generation endpoints.

The management service skips documents already marked `generated`. Deliberate regeneration uses `force`: the REST endpoints accept `force: true`, and the admin detail-page action automatically applies it when the current status is `error`. Grid mass actions and `einvoice:generate` run without `force` — they skip `generated` documents and cannot retry an `error` document.

Recovering a failed document

There is no automatic retry for `error` documents; recovery is a deliberate manual step:

1. Open the invoice or credit memo and read the stored error.
2. Correct the source or configuration problem.
3. Regenerate once through the detail-page **Generate E-Invoice** action (it applies `force` for `error` rows) or the REST endpoint with `force: true`.
4. Download and validate the result before sending it.

Repeated attempts cannot fix missing VAT IDs, wrong buyer references or a format that is not configured correctly. Fix the cause first.

Related

- Status Tracking
- Document Storage, Email and Downloads
- Error Handling
- Go-Live Checklist

Status Tracking

E-invoice state lives on the Magento invoice or credit memo. Both grids expose a status column for finding work. The invoice and credit-memo detail pages show the richer metadata and actions that are actually available.

Status values

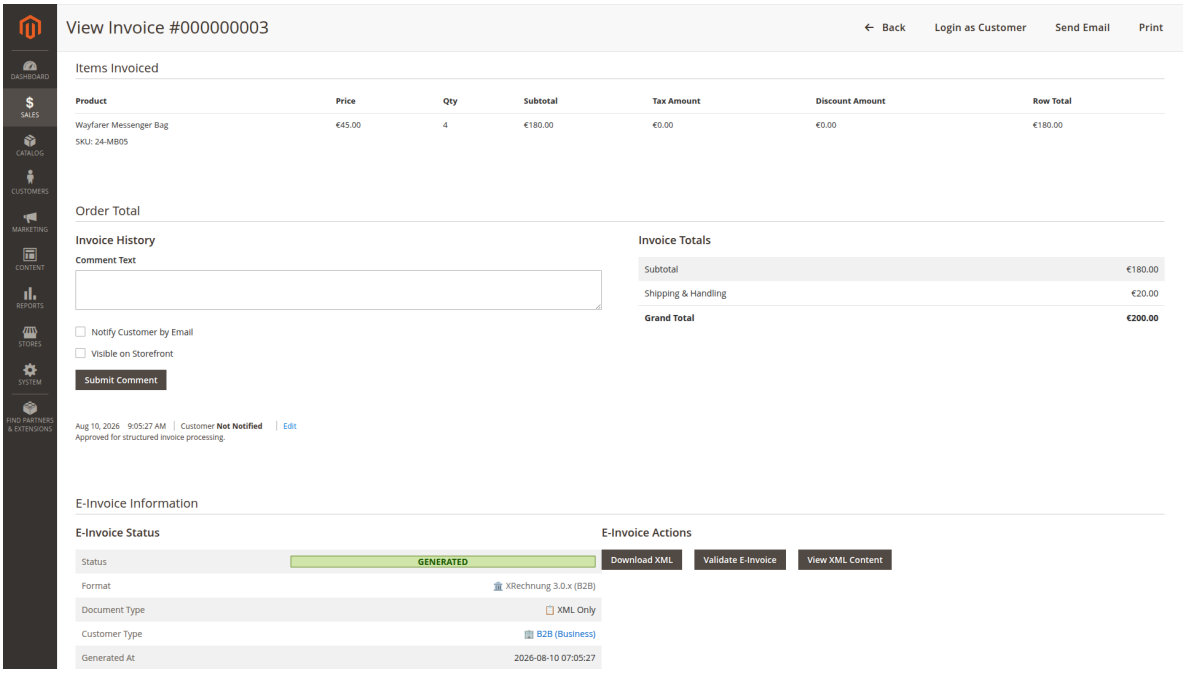
Status	What it means	What to do
`scheduled`	Waiting for the hourly `einvoice_process_scheduled` cron worker	Confirm cron runs; check the flow's scheduled batch size
`queued`	Claimed and published to the message queue, waiting for the consumer	Confirm the matching consumer is running
`processing`	A worker or the current request is generating the document	Wait; rows stuck past the recovery timeout are reclaimed automatically
`generated`	Local document generation completed and its metadata was recorded	Download and validate before delivery
`error`	The last generation attempt failed	Read the stored error, fix its cause, then retry once
`disabled`	Automatic mode is disabled for this flow	Use a manual action when a document is needed

`generated` is a local generation state, not a delivery receipt. It does not mean a PEPPOL access point, portal or customer received or accepted the file.

Invoice view

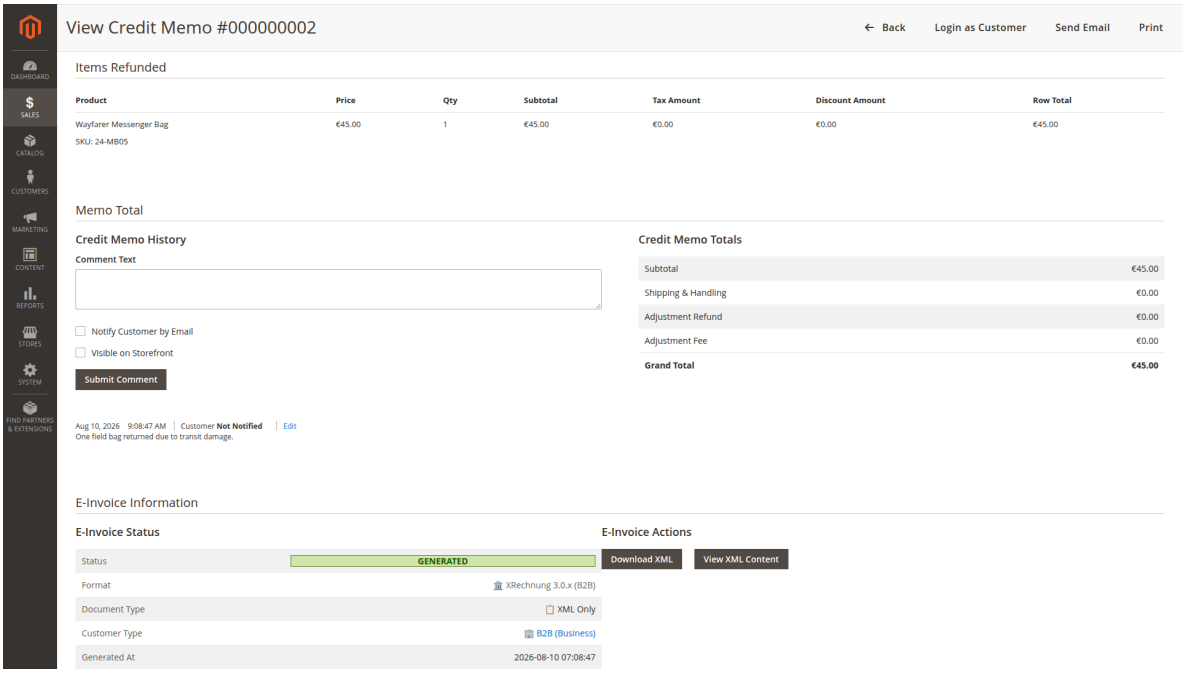
Open **Sales > Invoices**, then select the invoice. The E-Invoice Information section can show:

- status and last error;
- selected format and hybrid/XML document type;
- generation timestamp;
- **Generate E-Invoice** when generation is needed;
- **Download XML**;
- **Download PDF** for a hybrid document;
- **Validate E-Invoice** and **View XML Content**.



Credit-memo view

Credit memos have their own information block and actions when general e-invoicing and credit-memo e-invoicing are enabled for the store view. Before generation it can offer **Generate E-Invoice**. After generation it can offer XML/PDF downloads where files exist and **View XML Content**. It does not expose the invoice detail page's **Validate E-Invoice** action.



Grids and mass actions

The invoice grid adds exactly one visible E-Invoice column: **E-Invoice Status**. Its E-Invoice mass actions are **Generate E-Invoice** and **Download E-Invoices (ZIP)**. The credit-memo grid adds the same **E-Invoice Status** column and the same two mass actions.

There is no visible mass-validation action in either grid. Invoice validation is a detail-page action. Admin-role ACL and the feature switches control whether the declared columns and actions are available; the UI plugins also hide them when the feature is disabled.

Data recorded on the sales document

The module persists:

- status;
- format;
- generated timestamp;
- relative XML and PDF paths;
- last error message;
- validation/customer metadata used by the workflow.

The service updates the corresponding sales grid after relevant status changes.

A practical monitoring routine

1. Filter the invoice grid's **E-Invoice Status** column for `error` and stale `scheduled`/`queued`/`processing` rows.
2. The credit-memo grid exposes the same **E-Invoice Status** column; use it or open the record for detail.
3. For `scheduled`, confirm the hourly cron worker runs and the batch size fits the volume; for `queued`, check the matching consumer.
4. For `error`, open the document and copy the exact message into the incident record.
5. Correct the source or configuration problem and generate once.
6. Validate an invoice through its detail action or validate an exported invoice/credit-memo file with the appropriate CLI or external tool.
7. Track delivery in the downstream system; Magento's statuses do not cover transmission.

Magento's standard `system.log` and `exception.log` contain technical generation details. They are not a permanent accounting audit log; retain the documents and downstream delivery evidence according to your own policy.

Related

- Generation Modes and Triggers
- Error Handling
- Document Storage, Email and Downloads

Admin workflows

The admin UI separates invoice and credit-memo work. The available actions depend on the store-view feature switches and the admin role's ACL resources.

Invoice detail

On **Sales > Invoices**, open an invoice to see its E-Invoice Information block.

1. For an empty, `disabled` or `error` state, choose **Generate E-Invoice** only after checking the stored error and source data. For `error` rows the action automatically applies `force`.
2. After local generation reaches `generated`, confirm the format and generated timestamp.
3. Use **Download XML** and, for ZUGFeRD or Factur-X with a stored PDF, **Download PDF**.
4. Use **Validate E-Invoice** for the local validation result and **View XML Content** for inspection.
5. Validate the downloaded file against the receiver's rules before delivery.

The page actions depend on status, available file paths, store-view switches and ACL. `generated` records local generation; it does not record transmission or acceptance.

Credit memo detail

Credit memos have a separate information block and generation action. General e-invoicing and credit-memo e-invoicing must both be enabled for the store view.

1. Open the credit memo and check its status and any stored error.
2. Choose **Generate E-Invoice** for an empty, `disabled` or `error` state (for `error`, `force` is applied automatically).
3. After generation, use the XML/PDF download offered for the stored files or choose **View XML Content**.
4. Validate the exported document with the appropriate CLI or recipient tool; the credit-memo detail UI has no **Validate E-Invoice** action.

When generated without an explicit format, a credit memo reads the store view's current **Default B2B Format** configuration, just like invoice generation. It does not bind to the format previously stored on the related invoice. If the store setting changes, a new or retried generation uses the new selection, while an already `generated` document is skipped by the management service. Credit memos still have separate mode, trigger, email and filename settings.

Grids and mass actions

Both grids add the **E-Invoice Status** column. Authorized admins can run **Generate E-**

Invoice on both grids, and both offer **Download E-Invoices (ZIP)**, which bundles the selected records' available e-invoice files into one archive. The credit-memo ZIP action uses the credit memo attachment strategy and the credit-memo download permission.

Neither grid declares a mass-validation action. Mass generation runs without `force`: it skips `generated` records and cannot retry `error` rows — prove a correction on one document through its detail page before using generation on a selection.

Validation result

Use the invoice detail-page validation action after generation and treat its result as a local diagnostic. For a credit memo, download or inspect the generated file and use the appropriate CLI or external validator. For PEPPOL BIS, also run the provider's current business-rule or Schematron validator. For XRechnung, confirm the buyer routing reference and recipient rules separately.

ACL boundary

Grant only the resources needed by an operator: configuration, invoice generation and credit-memo generation are separate permissions. REST routes use the corresponding generation ACLs. Do not expose generation endpoints or document contents to anonymous storefront clients.

Related

- Status Tracking
- Queue and cron operations
- REST API

Error Handling

Treat an e-invoice error as a failed document-generation job. Preserve the Magento invoice or credit memo, fix the data or configuration that caused the failure, and then run one controlled retry.

What Block on Error really does

Invoice and credit-memo settings both contain a **Block … on E-Invoice Error** switch. It can propagate an exception from immediate generation. It is not a transactional guarantee:

- the invoice observer runs on `sales_order_invoice_save_commit_after`, after Magento commits the invoice;
- queue and cron failures occur later and cannot block sales-document creation;
- configuration errors are stored as `error` without following the same blocking branch;
- unexpected exceptions may propagate regardless of the switch.

Keep this control off during rollout. Build an operations process around status and recovery instead of assuming a failed e-invoice removes the Magento document.

Failure categories

Category	Typical examples	First check
Source data	Missing address, VAT ID, seller contact or buyer reference	Invoice, order and store-view data
Format/configuration	Wrong profile, endpoint scheme, payment code or unsupported activation state	E-Invoice configuration in the document's store view
Validation	Malformed XML or schema mismatch	Exact validation messages and selected version/profile
Hybrid PDF	Magento PDF failure or XML embedding failure	Normal Magento PDF and hybrid output path
Storage	Unwritable/invalid `var/` path or missing file	Storage strategy, path, permissions and free space
Processing	Stopped consumer, cron delay or stuck claim	Mode, consumer, cron schedule and status age
Delivery	Receiver rejects a locally generated file	Downstream provider or portal response

Notifications

Under **Validation & Error Handling**, configure:

- **Enable Error Notifications**;
- **Error Notification Email**;
- **Error Notification Threshold**.

The notification service counts failures and sends a message after the configured threshold. Test this in a controlled environment. A notification is an alert, not an automatic correction or delivery retry.

The mails use two module templates — `einvoice_error_notification` for a single failed document and `einvoice_batch_error_notification` for batch failures. Override them under **Marketing > Communications > Email Templates** by loading the template ID as the base for a new template.

Automatic recovery — and what is not retried

The hourly `einvoice_process_scheduled` worker reclaims `queued` and `processing` rows whose claim is older than the flow's **Recovery Timeout (Minutes)** (default `30`). That covers transient interruptions such as a crashed consumer or a killed worker.

Documents already marked `error` are **not** retried automatically. Recovery is deliberate: fix the cause, then regenerate through the detail-page **Generate E-Invoice** action (it applies `force` for `error` rows) or the REST endpoint with `force: true`. Grid mass actions and `einvoice:generate` run without `force`, so they skip `generated` documents and cannot retry an `error` document.

Manual recovery

1. Open the failed invoice or credit memo.
2. Record the exact error and numeric entity ID.
3. Check the store view and selected format/profile.
4. Fix the underlying source or configuration.
5. Use **Generate E-Invoice** on the detail page once — for an `error` row it applies `force` automatically.
6. Download XML/PDF and validate it.
7. Deliver through the intended channel and record that downstream result separately.

Grid mass actions do not apply `force`; use them for first-time generation of unprocessed rows, not for retrying `error` documents.

Common cases

VAT ID or seller information is missing

Complete the seller fields in the same store view as the sales document. For XRechnung projects, also populate seller contact details. Then regenerate.

XSD validation fails

Confirm the selected format, profile/version and exact schema error. A wrong version cannot be fixed by lowering validation. Correct the document contract or the source fields.

No PDF is available

Only ZUGFeRD and Factur-X are hybrid. For those formats, first prove that Magento's normal invoice or credit-memo PDF renders, then inspect the hybrid builder and stored PDF path.

A PEPPOL receiver rejects the XML

Confirm endpoint schemes, buyer reference, participant registration and provider business rules. The module creates UBL but does not perform access-point transmission or full provider validation.

Factur-X says the format is not configured

Confirm that **Enable E-Invoicing** is on and **Default B2B Format** is set to Factur-X in the document's store view. Save the store-view scope and retry. The formatter reads that default-format setting; do not create a hidden enabled-formats setting.

Logs and support data

Review `var/log/system.log` and `var/log/exception.log` around the failed entity ID. Share only sanitized excerpts. Include package and Magento compatibility details, store view, format/profile, mode, status and exact error. Do not paste invoice XML containing customer data into public tickets.

Related

- Status Tracking
- Generation Modes and Triggers
- Troubleshooting

Queue and cron operations

Choose one processing mode per document flow and monitor the worker that owns it. A `queued` or `scheduled` row is a work item, not a successful document.

Queue mode

Invoice and credit memo messages use separate DB-backed topics and consumers:

```
php bin/magento queue:consumers:start mageb2b.einvoice.generate
php bin/magento queue:consumers:start
mageb2b.einvoice.generate.creditmemo
```

Run both under the same process supervision used for other Magento consumers. The invoice consumer does not process credit memos. A successful consumer changes `queued` to `generated`, meaning that local document generation completed; it does not prove delivery. An exception stores `error` and the message can enter the queue backend's failure path.

Queue verification workflow

1. Configure **Message Queue** for only the document flow under test.
2. Start the matching supervised consumer and confirm Magento lists it.
3. Generate a new invoice or credit memo and note its numeric entity ID.
4. Confirm that the document first enters `queued` and that the matching topic receives work.
5. Wait for the consumer, then reopen the detail page. Expect `generated` with local file metadata or `error` with a stored message.
6. Download and validate the result. Verify delivery separately through the intended downstream system.

Scheduled mode and the cron worker

A single job in Magento's `default` group handles both document flows:

Job	Schedule
`einvoice_process_scheduled`	minute `00` every hour

For each store, the worker processes up to the flow's **Scheduled Batch Size** (default `100`, allowed range 1–1000) of due `scheduled` rows. Invoice and credit-memo flows have separate batch settings.

The same worker also performs stale-claim recovery: `queued` and `processing` rows older than the flow's **Recovery Timeout (Minutes)** (default `30`, allowed range 5–1440)

are claimed again and reprocessed. This rescues documents stranded by a crashed worker or consumer. It does not retry rows already marked `error` — those require a deliberate manual regeneration.

Diagnosis sequence

1. Confirm the document's store view and exact generation mode.
2. For queue mode, list consumers and inspect the queue backlog.
3. For scheduled mode or stuck rows, inspect `cron_schedule` for `einvoice_process_scheduled` and its latest status.
4. Run `php bin/magento cron:run --group=default` once as a diagnostic, not as the production scheduler.
5. Read the stored error before changing source data or retrying.
6. Fix deterministic data or configuration errors, then retry once through the detail-page action or REST `force`.

Capture queue evidence from the consumer/process view, the affected document detail page and the queue backend or `cron_schedule`. A screenshot of `generated` proves local completion only; retain downstream acknowledgement separately when delivery is in scope.

Related

- Generation Modes and Triggers
- Error Handling and Recovery
- Status Tracking

VAT Classification

Every e-invoice line carries an EN 16931 tax-category code. The extension derives that code from tax rate, store configuration, buyer country/VAT ID and voucher detection. Review the result with your accounting rules; automatic classification cannot decide whether a transaction is legally exempt or reverse charge.

Supported Categories

Code	Name	When it applies
`S`	Standard rate	Any line with tax greater than 0
`Z`	Zero rated	Configured fallback for 0% lines in the same country
`E`	Exempt	Seller operates as Kleinunternehmer (§19 UStG)
`AE`	Reverse charge	Available as the configured fallback category for otherwise unclassified 0% lines
`K`	Intra-community supply	EU B2B with 0% tax and a valid buyer VAT ID (§4 Nr. 1b UStG)
`G`	Free export	Destination outside the EU (§4 Nr. 1a UStG)
`O`	Out of scope	Multi-purpose voucher (§3 Abs. 15 UStG)

Classification Logic

For each invoice line the extension evaluates, in order:

1. **Kleinunternehmer flag** is on → `E`
2. Line is a **multi-purpose voucher** → `O` (see Gift Cards)
3. Line has tax greater than 0 → `S`
4. Buyer country differs from seller country:
   - Buyer is in the **EU list** and has a **VAT ID** → `K`
   - Buyer is outside the EU → `G`
5. Otherwise → configured default (default `Z`)

The EU list is read from Magento's built-in `general/country/eu_countries` setting, so edits under **Stores > Configuration > General > Countries Options** apply everywhere automatically.

Configuration

Stores > Configuration > MageB2B > E-Invoice > VAT Classification

Setting	Default	Notes
Kleinunternehmer (§19 UStG)	No	When enabled, every line is classified as `E` regardless of tax
Default Category for 0% Lines	Z	Used when a 0% line does not match `K` or `G` rules
Treat Magento Giftcards as Multi-Purpose Voucher	Yes	Adobe Commerce `giftcard` products → `0`
Voucher Override Product Attribute	(empty)	Product attribute code whose value `multi_purpose` / `single_purpose` overrides detection
Exemption Reason: Intra-Community (K)	Innergemeinschaftliche Lieferung (§4 Nr. 1b UStG)	BT-120 text for `K`
Exemption Reason: Export (G)	Ausfuhrlieferung (§4 Nr. 1a UStG)	BT-120 text for `G`
Exemption Reason: Exempt (E)	Kleinunternehmer (§19 UStG)	BT-120 text for `E`
Exemption Reason: Reverse Charge (AE)	Steuerschuldnerschaft des Leistungsempfängers (§13b UStG)	BT-120 text for `AE`
Exemption Reason: Out of Scope (O)	Mehrzweck-Gutschein (§3 Abs. 15 UStG)	BT-120 text for `0`

Set exemption reasons to wording approved for your invoices. The extension does not determine the legal reason for a zero-rate transaction.

Exemption Reason (BT-120)

When the category is not `S` or `Z`, the invoice carries a human-readable exemption reason at both line and document level. Empty reasons fall back to the defaults above. Receivers use this text to understand *why* tax was not charged.

Tax Totals

The document-level tax section groups lines by `(category, rate)`. A single invoice can legitimately contain multiple categories, for example a standard-rated product plus a multi-purpose voucher:

Category	Rate	Base	Tax
S	19.00	100.00	19.00
0	0.00	50.00	0.00

Out-of-scope lines contribute to the base total but never to the tax amount, per §3 Abs. 15 UStG.

Verification

Use `php bin/magento einvoice:verify-amounts --file=<actual-cii-xml-path>` to check the CII totals. The entity-ID options do not follow the configurable filename manager; see CLI Commands.

Upgrading from earlier module versions

The formatter classifies each line from the order tax treatment. Plain single-country 19% scenarios use `S`; cross-border, exempt and voucher lines can carry a different category and exemption reason.

Related

- Gift Cards & Vouchers
- Seller Identity
- CLI Commands

Document data mapping

The formatter builds the document from the Magento sales document and the store-view configuration. Review the source field as well as the output value when a receiver rejects a file.

References

Buyer reference (BT-10), purchase order and related references can come from persisted order or customer values. If no configured value is present, the invoice or credit-memo increment ID can be used as a fallback. That keeps the XML populated but may not satisfy procurement routing.

Prepayments and totals

Prepayment fields can map to BT-113. The payable amount follows the document total rules, including BT-112 and BT-115. A prepayment must be deducted from the grand total before it is emitted as payable. Check the generated CII totals with `einvoice:verify-amounts` and compare them with Magento totals.

VAT and vouchers

Line categories include standard, zero-rated, exempt, reverse-charge, intra-community, export and out-of-scope cases. Magento gift-card products and the configured voucher attribute can affect classification. Test mixed VAT rates, shipping, discounts, gift cards and cross-border orders together with the recipient.

Accounting references

BT-133 can come from an order-item field, product attribute or customer attribute. The value is resolved from the sales data available during generation. Treat it as a snapshot: later changes to product or customer attributes do not rewrite an already generated document.

Payment means

Default payment terms and payment means codes can be overridden per payment method. The **Payment Method Mapping** grid edits one row per payment method with these columns:

Column	Effect
Payment Method	The Magento payment method the row applies to
Payment Terms Template	Term text for this method; empty inherits the default template

Column	Effect
Terms Days	Due-date offset for this method; empty inherits **Default Payment Terms (Days)**
Payment Means Code	UN/EDIFACT 4461 code for this method; empty uses the default (or the no-IBAN default when no IBAN resolves)
Settlement Treatment	`Standard / unpaid`, `Document-specific prepayment` or `Paid with settlement evidence` — controls how an already-paid amount enters the document totals (BT-113/prepaid vs. fully settled)
IBAN Override	Bank IBAN used for this method instead of the company **Bank IBAN**
BIC Override	Bank BIC used for this method instead of the company **Bank BIC/SWIFT**

A missing IBAN can select the configured no-IBAN code. Verify the result against the payment method and the instructions printed on the normal Magento invoice.

Related

- Seller Identity
- VAT Classification
- Configuration

Gift Cards & Vouchers

The extension can classify designated multi-purpose voucher lines as out of scope (`0`) and emit the configured exemption reason. Product setup decides which lines receive that treatment; confirm the classification with the people responsible for tax configuration.

Background

The module models the following distinction in its German default wording:

Type	Definition	VAT treatment on sale
Single-purpose voucher (§3 Abs. 14)	Place of supply and VAT rate are known at issue	VAT applies immediately
Multi-purpose voucher (§3 Abs. 15)	VAT rate or place of supply is not known at issue	No VAT on sale; VAT applies on redemption

Detection Order

For each line the extension resolves, in order:

1. **Product attribute override:** If `einvoice/vat/voucher_product_attribute` is configured, the attribute value takes precedence:
   - `multi_purpose` → force out-of-scope (`0`)
   - `single_purpose` → force normal tax handling
2. **Adobe Commerce giftcard product type:** When the **Treat Magento Giftcards as Multi-Purpose Voucher** flag is enabled (default), any product with `product_type=giftcard` is treated as a multi-purpose voucher.
3. Otherwise not a voucher.

Configuration

Stores > Configuration > MageB2B > E-Invoice > VAT Classification

Setting	Default	Notes
Treat Magento Giftcards as Multi-Purpose Voucher	Yes	Adobe Commerce `giftcard` products automatically flagged
Voucher Override Product Attribute	(empty)	Product attribute code whose value (`multi_purpose` / `single_purpose`) overrides detection

Setting	Default	Notes
Exemption Reason: Out of Scope (O)	Mehrzweck-Gutschein (§3 Abs. 15 UStG)	BT-120 text used for voucher lines

Custom Product Attribute

If you sell vouchers via third-party modules or custom product types, create a product attribute (e.g. `einvoice_voucher_type`) with values `multi_purpose` or `single_purpose`, and enter the attribute code in the **Voucher Override Product Attribute** field.

Effect on Invoice

Multi-purpose voucher lines:

- Use category `0` **(Out of scope)** in BT-151
- Use rate **0 %** in BT-152
- Emit a BT-120 exemption reason (default German wording, override in admin)
- Contribute to the base total **but not** to the tax amount of the invoice

Example

A cart with one standard product (€100, 19 %) and one multi-purpose voucher (€50) produces two tax subtotals:

Category	Base	Tax
`S`	100.00	19.00
`O`	50.00	0.00

Grand total: **169.00 €** (100 + 19 + 50).

Related

- VAT Classification
- EN16931 Format

Seller Identity

Beyond VAT ID and tax number, e-invoices can carry additional seller identifiers used by particular recipients and routing systems. Populate an identifier only when you know who issued it and which scheme the receiver expects.

Fields

Stores > Configuration > MageB2B > E-Invoice > Company Information

Field	Scheme	Use Case	Where it lands
Seller Legal Name (BT-27)	Not set	Legal entity name — required for every format	`Seller / Name` (CII) / `PartyLegalEntity / RegistrationName` (UBL)
VAT ID	Not set	Seller tax identification used by the formatters	`Seller / SpecifiedTaxRegistration` (VA)
Tax Number	Not set	German Steuernummer	`Seller / SpecifiedTaxRegistration` (FC)
Company Registration Number	Not set	HRB / HRA	`Seller / LegalOrganization / ID`
SIRET Number	Not set	French businesses (Factur-X)	`Seller / SpecifiedTaxRegistration` (FC)
Seller Trading Name (BT-28)	Not set	Alternative business name	`Seller / LegalOrganization / TradingBusinessName` (CII) / `Party / PartyName` (UBL)
Seller GLN	`0088`	GS1 Global Location Number for logistics/PEPPOL	`Seller / GlobalID`
Seller DUNS Number	`0060`	Dun & Bradstreet identifier for international B2B	`Seller / GlobalID`
Seller Leitweg-ID	`0204`	Used when the seller itself is a public entity	`Seller / GlobalID` (XRechnung only)

Field	Scheme	Use Case	Where it lands
Seller Contact (Name/Phone/Email)	Not set	Required for XRechnung (BR-DE-2, PEPPOL-R020)	`Seller / DefinedTradeContact`

Seller Legal Name is read strictly from `einvoice/company/seller_legal_name`; the Magento store information name is not consulted at generation time. A data patch seeded existing installations from **Stores > General > Store Information > Store Name**, so verify the migrated value once after updating — generation fails validation when the field is empty.

Requirements vary by format and receiver. The module's company-data check validates its local rules; the recipient may require additional identifiers.

Tax Representative (BG-11 / BT-63)

The module can declare a fiscal representative for a seller configuration that requires one. Whether a representative is legally needed is an accounting/legal decision outside the extension.

Stores > Configuration > MageB2B > E-Invoice > Tax Representative

Setting	Notes
Enable Tax Representative	Master switch, off by default
Representative Name	Legal entity name
Representative VAT ID (BT-63)	Mandatory
Street / Postcode / City / Country	Address of the representative

The tax representative is only emitted for profiles that support BG-11:

Format	Supports BG-11?
EN16931	Yes
XRechnung	Yes
ZUGFeRD EN16931 / Extended	Yes
Factur-X EN16931 / Extended	Yes
ZUGFeRD Minimum / Basic / BASIC WL	No (not in schema)
PEPPOL BIS Billing 3.0	Yes

Best Practices

1. Leave GLN and DUNS empty unless a counterpart or delivery provider explicitly asks for them.
2. Fill in **Seller Trading Name** if your marketing name differs from the legal name on the commercial register.
3. If you already use a Leitweg-ID for buyers and occasionally sell as a public entity yourself, set the seller-side Leitweg-ID under this section.
4. Fiscal representative data is visible on every invoice. Enable it only when you actually have one.

Related

- PEPPOL BIS Billing 3.0
- XRechnung Format
- Configuration

Document Storage, Email and Downloads

Generation creates the document content. Storage and delivery decide what happens next. Configure these separately so that a valid file is not lost, attached twice or mistaken for a transmitted invoice.

What each format produces

Format	XML	Hybrid PDF	Automatic attachment choice
ZUGFeRD	Yes	Yes	PDF
Factur-X	Yes	Yes	PDF
XRechnung	Yes	No	XML
EN 16931	Yes	No	XML
PEPPOL BIS Billing 3.0	Yes	No	XML

The **Automatic** attachment strategy sends the hybrid PDF when one exists; otherwise it sends XML. **XML only**, **PDF only** and **Both** let you override that choice. Selecting PDF-only for an XML-only format leaves no PDF to attach.

Permanent storage

With **Permanent Storage**, generated files are written below Magento's private `var/` directory, at the path configured in **File Storage Path** (default `einvoice`). The default locations are:

```
var/einvoice/
var/einvoice/creditmemo/
```

The invoice or credit memo stores the format, status, generation time and relative XML/PDF paths. Admin downloads, API enrichment and customer downloads can reuse those files. Because the files live outside `pub/media`, they are never reachable through a public URL — downloads run through controlled admin and customer-account actions.

Use permanent storage when you want predictable downloads, backup coverage and a stable hand-off to another system. Treat the directory as invoice data: include it in retention planning. To move artifacts written by older module versions from `pub/media` into private storage, run `php bin/magento einvoice:storage:migrate-public`.

On-demand generation

With **On-Demand Generation**, the file manager does not persist XML or PDF during

normal generation. When a supported action later asks for the document, the service can generate it again from the Magento invoice or credit memo.

This reduces stored files but changes the operational risk:

- a later configuration or source-data change can affect regenerated output;
- downloads and emails do more work at request time;
- the original generated bytes are not preserved as an archive;
- generation must still be enabled and healthy when the file is requested.

Choose on-demand only when those trade-offs fit your accounting and retention process.

Filename patterns

Invoice patterns can use:

- `{invoice_increment_id}`
- `{order_increment_id}`
- `{invoice_id}`
- `{format}`
- `{type}`
- `{date}`
- `{datetime}`

Credit-memo patterns use the corresponding credit-memo and order identifiers documented in the configuration screen. Path separators and unsafe filename characters are removed by the storage service.

Use a stable, readable pattern. Do not put customer names, email addresses or other personal data in filenames.

Email attachments

Invoice and credit-memo email attachments have separate enable switches and strategies. The sender plugin looks up or generates the document immediately before the Magento email is sent, registers the chosen attachments, sends the message and then clears the temporary registry.

For a safe rollout:

1. keep attachments disabled while validating files;
2. configure the invoice attachment switch and strategy without changing the credit-memo switch;
3. send an invoice email to a reserved `.example` address captured by local Mailpit;
4. inspect the Mailpit message, filename, MIME type and actual attachment contents;
5. repeat with the separate credit-memo attachment switch and a new credit-memo email;

6. confirm how async generation interacts with the moment each email is sent;
7. record this as local Mailpit evidence, not real recipient delivery.

If queue or cron generation happens after the transactional email, the document may not yet be available. Align email timing with the selected generation mode.

Customer downloads

The customer account can offer downloads for generated documents. Five switches under **Customer Account Downloads** control the offer — all are disabled by default and must be enabled per store view:

- **Invoice XML**, **Invoice PDF** and **Invoice XML ZIP** on the invoice page;
- **Credit Memo XML** and **Credit Memo PDF** on the credit-memo page.

PDF downloads apply to hybrid formats (ZUGFeRD, Factur-X); XML-only formats produce XML downloads. The ZIP action bundles all of an order's generated invoice XML files into one archive.

The controllers check document ownership and availability before returning a file. Guest and registered-customer layouts are supported.

What this does not deliver

Saving a PEPPOL BIS XML file does not send it through PEPPOL. Creating XRechnung XML does not upload it to a public-sector portal. Connect the stored or on-demand output to the delivery service required by the recipient.

Related

- Configuration
- Generation Modes and Triggers
- Status Tracking
- Troubleshooting

B2G / Public Sector Detection

German public-sector recipients (Behörden) route incoming e-invoices by their **Leitweg-ID** — the EN 16931 Buyer Reference (BT-10). An order detected as B2G is generated with the configured **B2G Format** and strictly requires a resolvable Buyer Reference / Leitweg-ID; generation fails with a clear error when none can be resolved.

B2G handling is off by default. With detection disabled, every order uses **Default B2B Format** and the normal buyer-reference fallback rules.

Configuration

Open **Stores > Configuration > MageB2B > E-Invoice > B2G / Public Sector (Leitweg-ID)**.

Setting	Options	Notes
B2G Detection Method	`disabled`, `order_reference`, `customer_group`, `customer_attribute`	How public-sector recipients are identified
B2G Customer Groups	Customer group multiselect	Visible when the method is `customer_group`
Leitweg-ID Customer Attribute	Customer text attribute select	Visible when the method is `customer_attribute`

Setting	Location	Notes
B2G Format (Public Sector)	`einvoice/general/b2g_format` under **General Settings**	Format used for detected B2G orders — typically XRechnung. When empty, the default format is used for B2G orders as well.

Detection methods

Method	An order counts as B2G when	Where BT-10 comes from
Order contains Buyer Reference / Leitweg-ID (`order_reference`)	the order carries a value in its `einvoice_buyer_reference` field	that same order value

Method	An order counts as B2G when	Where BT-10 comes from
Customer Group (`customer_group`)	the order's customer group is one of the configured **B2G Customer Groups**	the order's buyer reference field
Customer Attribute contains Leitweg-ID (`customer_attribute`)	the selected customer attribute is non-empty on the order's customer	the order's buyer reference first; the customer attribute value is used when the order carries none

Notes on the boundaries:

- Guest orders have no customer group membership and no customer attribute; they can only be detected through the **order reference** method.
- The **customer group** method only flags the order as B2G. It does not itself supply a Leitweg-ID — the reference must still reach the order, for example through the native checkout field or the `einvoice_buyer_reference` extension attribute on `POST /V1/carts/{cartId}/payment-information` (see REST API).
- With the **customer attribute** method, a per-order buyer reference wins over the customer master value: the routing identifier communicated with the order is authoritative.

What changes for a detected B2G order

1. The recipient is typed `b2g` and the document is generated with **B2G Format** when one is configured — otherwise the store's **Default B2B Format**.
2. A resolvable Buyer Reference / Leitweg-ID (BT-10) is **mandatory**. When detection flags the order but neither the order field nor (with the customer-attribute method) the customer record yields a value, generation fails: the document is marked `error` with a message stating that no Buyer Reference / Leitweg-ID could be resolved.
3. The increment-ID fallback used for ordinary B2B buyer references does not rescue a detected B2G order.

Recover by supplying the recipient's real Leitweg-ID on the order, then regenerate once (see Error Handling).

Verify before rollout

- Confirm the detection method against how Leitweg-IDs actually reach your orders —

checkout field, ERP order import, or customer master data.

- Generate one manual document for a detected order and check BT-10, the selected format and the recipient type in the XML.
- Decide deliberately which detection source is authoritative when several could apply; only one method can be active.

Related

- XRechnung
- PEPPOL BIS Billing 3.0
- Document Data Mapping
- Configuration

ZUGFeRD

ZUGFeRD is the module's default format. It combines a readable Magento invoice PDF with embedded CII XML, so the recipient can view one document while accounting software extracts its structured data.

Output

Property	Supported behavior
Format version	ZUGFeRD 2.5
Syntax	UN/CEFACT Cross Industry Invoice (CII)
Document type	Hybrid PDF with embedded XML
Separate XML	Yes with permanent storage
Invoice and credit memo	Both supported

During generation, the module first builds the structured document, renders Magento's normal invoice or credit-memo PDF, and then uses the hybrid builder to embed the XML. If PDF preparation fails, inspect the Magento PDF path and extension logs; a valid XML document does not by itself prove that a hybrid PDF was created.

Profiles

The shared ZUGFeRD/Factur-X profile selector offers:

Admin value	Purpose
MINIMUM	Header-level information only
BASIC WL	Basic data without the full EN 16931 line-detail model
BASIC	Basic invoice profile
EN 16931	EN 16931-aligned profile and module default
EXTENDED	Broader data model for recipients that explicitly require it

The current selector does not offer a separate `COMFORT` or `XRECHNUNG` value. Choose **EN 16931** for the normal EN 16931 profile. Use the dedicated XRechnung format when the recipient wants XRechnung XML.

Configure ZUGFeRD

1. Set **Default B2B Format** to **ZUGFeRD 2.5**.

2. Select the profile confirmed by the recipient.
3. Keep invoice document type `380` unless the business process calls for another supported code.
4. Complete seller VAT, address and payment details.
5. Generate a manual sample with shipping, discounts and the VAT rates you really use.

Credit memos use document type `381` or `384` from the credit-memo settings and the same store-level format/profile.

Files and email

Permanent storage normally creates XML and PDF below `var/einvoice/` in Magento's private `var/` directory; credit memos use its `creditmemo` subdirectory. The **Automatic** email strategy attaches the hybrid PDF. Choose **Both** only when the recipient genuinely wants the PDF and separate XML.

Validation

The formatter checks XML structure and can run the bundled profile XSD. Test the resulting hybrid file with the recipient's validator as well. XSD success does not test every business rule, the embedded-file relationship or the receiver's import behavior.

Common problems

XML exists but PDF is missing

Confirm that Magento can render its normal invoice PDF, the `horstoeko/zugferd` dependency is installed, storage is writable, and the document status contains a PDF path.

Recipient expects XRechnung

Do not select a different ZUGFeRD profile and assume it becomes XRechnung. Choose the dedicated **XRechnung** format and version required by the recipient.

Related

- Factur-X 1.09
- Document Storage, Email and Downloads
- Configuration

Factur-X

Factur-X is a hybrid CII document: a readable PDF carries embedded structured XML. The module uses the same profile selector and hybrid-PDF builder family as ZUGFeRD, with Factur-X 1.09 identifiers and schemas.

Output

Property	Supported behavior
Format version	Factur-X 1.09
Syntax	UN/CEFACT Cross Industry Invoice (CII)
Document type	Hybrid PDF with embedded XML
Profiles	MINIMUM, BASIC WL, BASIC, EN 16931, EXTENDED
Invoice and credit memo	Formatters are included for both

Configure the SIRET number when it is relevant to the seller and verify VAT, registration, address and payment information with the intended receiver.

Activation

The invoice formatter reads **Default B2B Format** at store scope. Select Factur-X there, save the same store view and confirm **Enable E-Invoicing** is enabled. No hidden enabled-formats setting is required.

Configure and test

The intended setup is:

1. set **Default B2B Format** to **Factur-X 1.09**;
2. select the recipient's profile in **ZUGFeRD / Factur-X Configuration**;
3. complete SIRET and other seller fields that apply;
4. generate invoice and credit-memo samples;
5. validate both the XML and hybrid PDF with the recipient.

Files and delivery

Permanent storage writes separate XML and hybrid PDF files. The automatic email strategy prefers the PDF. The module creates files but does not send them to a French public platform or clearance provider.

Related

- ZUGFeRD 2.5
- Configuration
- Troubleshooting

XRechnung

SoftwareSilo E-Invoice generates XRechnung as CII XML. Store views can select version 2.2, 2.3 or 3.0. The formatter is deliberately XML-only; it does not create a hybrid PDF or upload the document to a portal.

Configure the format

1. Set **Default B2B Format** to **XRechnung 3.0.x (B2B)**.
2. Select the exact version required by the receiver.
3. Complete seller contact name, phone and email.
4. Confirm how the buyer reference or Leitweg-ID reaches the generated XML in your project.
5. For public-sector recipients, choose the format under **B2G Format (Public Sector)** and configure B2G detection so those orders are typed `b2g` and fail clearly when no Leitweg-ID can be resolved.
6. Enable the appropriate validation level and generate a manual sample.

The module's internal validator checks structure and its bundled XSD. It does not enforce a Leitweg-ID because the formatter also supports B2B usage — strict BT-10 enforcement applies only to orders detected as B2G. A public-sector receiver may apply additional rules and reject a structurally valid file without its required routing reference.

Output and credit memos

XRechnung produces XML only for invoices and credit memos. Credit memos additionally use document type `381` or `384` from the credit-memo configuration.

If users need a readable invoice, keep Magento's ordinary PDF in the workflow. Selecting **PDF only** as the e-invoice attachment strategy produces no XRechnung PDF.

Submission is separate

The module does not upload to ZRE, OZG-RE or another receiving portal. Submission, credentials, transport acknowledgements and portal-specific validation belong to the connected delivery process.

Validate a real sample

Check seller contact, buyer reference, purchase-order reference, payment instructions, VAT categories, totals and the selected version. Then validate with the receiver's current rule set. Do this before changing the generation mode from manual to automatic.

Related

- B2G / Public Sector Detection
- EN 16931
- Seller Identity
- Go-Live Checklist

EN16931

EN 16931 defines a European semantic model for electronic invoices. This module's **EN16931 Standard** formatter emits that model as CII XML. It does not offer a syntax switch to UBL; choose PEPPOL BIS when the next system expects the module's UBL output.

Output

Property	Supported behavior
Model	EN 16931:2017
Syntax	UN/CEFACT CII
Document type	XML only
Invoice and credit memo	Both supported

When to use it

Use the plain EN 16931 formatter when the recipient asks for EN 16931 CII without a more specific national or network profile. If the recipient names XRechnung, ZUGFeRD, Factur-X or PEPPOL BIS, select that format instead; sharing a semantic foundation does not make their delivery contracts interchangeable.

Configure and test

1. Set **Default B2B Format** to **EN16931 Standard**.
2. Complete seller, buyer, payment and VAT information.
3. Generate an invoice and credit memo manually.
4. Run the amount-verification CLI command.
5. Validate against the receiver's requirements as well as the bundled schema.

The formatter creates XML only. Customer PDF download and PDF-only email attachment do not apply to this format.

Related

- XRechnung
- PEPPOL BIS Billing 3.0
- VAT Classification

PEPPOL BIS Billing 3.0

The PEPPOL BIS formatter creates UBL XML for invoices and credit notes. It prepares document content for a PEPPOL workflow; it is not an access point and does not transmit anything over the PEPPOL network.

Output

Property	Supported behavior
Profile	PEPPOL BIS Billing 3.0
Syntax	UBL
Document type	XML only
Invoice and credit memo	Both supported

Seller endpoint

Configure a seller endpoint scheme and identifier as a verified pair. Examples include VAT identifiers, GLNs and other EAS schemes. Do not choose a scheme from the label alone; your access-point provider must confirm that the participant identifier is registered and routable.

The default CustomizationID and ProfileID match the module's PEPPOL BIS Billing 3.0 profile. Override them only when the delivery partner gives you exact values.

Buyer endpoint resolution

The formatter looks for the buyer endpoint in this order:

1. order extension attributes `peppol_endpoint_id` and `peppol_endpoint_scheme`;
2. order data fields with the same names;
3. billing-address VAT ID, or customer tax VAT, mapped through the module's country-to-scheme list.

The attributes are declared on `Magento\Sales\Api\Data\OrderInterface`, but the module keeps no storage for them — an integration or custom plugin must populate the order's extension attributes before generation (see REST API).

The fallback is convenient, but a VAT ID is not automatically the endpoint the buyer registered. Check the result with the access-point provider.

Buyer reference

The formatter resolves BuyerReference (BT-10) from:

1. order data field `buyer_reference`;
2. Magento customer note on the order;
3. invoice or credit-memo increment ID as a final fallback.

The fallback keeps the element populated; it may still be the wrong procurement reference for the recipient. Capture the real value deliberately whenever their process requires it.

Validation and transport

The module performs deterministic PEPPOL checks for the UBL root, profile identifiers, seller and buyer endpoint schemes, line totals, VAT calculations and payable totals. This local check is separate from XSD validation, provider Schematron/business-rule checks and network delivery. The `einvoice:validate` CLI command does not accept PEPPOL as an XSD format.

A production flow therefore needs:

1. generated UBL from Magento and local PEPPOL checks;
2. receiver/business-rule validation required by the provider;
3. transmission through an access point;
4. delivery and rejection feedback returned to operations.

Magento's `generated` status covers step 1, not the remaining steps.

Email and files

PEPPOL BIS is XML-only. Automatic email attachment sends XML, while PDF-only produces no e-invoice attachment. Emailing XML is not equivalent to PEPPOL delivery.

Related

- B2G / Public Sector Detection
- Seller Identity
- Document Storage, Email and Downloads
- REST API
- Go-Live Checklist

Configuration Fields

This reference lists the settings exposed by `mageb2b/e-invoice` in Magento Admin.

Configuration paths are included for controlled deployments and `config:set`. Use Magento Admin for normal changes so field validation and scope inheritance still apply. The extension status display is not listed because it reports installation state rather than a configurable value.

General Settings

Field	Configuration path	Input	Scope
Enable E-Invoicing	`einvoice/general/enabled`	Select	Default, Website, Store view
Default B2B Format	`einvoice/general/default_format`	Select	Default, Website, Store view
B2G Format (Public Sector)	`einvoice/general/b2g_format`	Select	Default, Website, Store view

Visibility dependencies:

- `einvoice/general/default_format` is available when `einvoice/general/enabled` is `1`.
- `einvoice/general/b2g_format` is available when `einvoice/general/enabled` is `1`.

B2G / Public Sector (Leitweg-ID)

Field	Configuration path	Input	Scope
B2G Detection Method	`einvoice/b2g/detection_method`	Select	Default, Website, Store view
B2G Customer Groups	`einvoice/b2g/customer_groups`	Multiselect	Default, Website, Store view
Leitweg-ID Customer Attribute	`einvoice/b2g/leitweg_attribute`	Select	Default, Website, Store view

`einvoice/b2g/detection_method` accepts `disabled`, `order_reference`, `customer_group` and `customer_attribute`. See B2G / Public Sector Detection for behavior.

Visibility dependencies:

- `einvoice/b2g/detection_method` is available when `einvoice/general/enabled` is `1`.
- `einvoice/b2g/customer_groups` is available when `einvoice/b2g/detection_method` is `customer_group`.
- `einvoice/b2g/customer_groups` is available when `einvoice/general/enabled` is `1`.
- `einvoice/b2g/leitweg_attribute` is available when `einvoice/b2g/detection_method` is `customer_attribute`.
- `einvoice/b2g/leitweg_attribute` is available when `einvoice/general/enabled` is `1`.

Invoice Settings

Field	Configuration path	Input	Scope
Generation Mode	`einvoice/invoice_settings/generation_mode`	Select	Default, Website, Store view
Generation Trigger	`einvoice/invoice_settings/generation_trigger`	Select	Default, Website, Store view
Document Type Code	`einvoice/invoice_settings/document_type`	Select	Default, Website, Store view
Block Invoice on E-Invoice Error	`einvoice/invoice_settings/block_on_error`	Select	Default, Website, Store view
Attach E-Invoice to Invoice Email	`einvoice/invoice_settings/attach_to_email`	Select	Default, Website, Store view
Attachment Strategy	`einvoice/invoice_settings/attachment_strategy`	Select	Default, Website, Store view
Scheduled Batch Size	`einvoice/invoice_settings/scheduled_batch_size`	Text	Default, Website, Store view

Field	Configuration path	Input	Scope
Recovery Timeout (Minutes)	`einvoice/invoice_settings/recovery_timeout_minutes`	Text	Default, Website, Store view
Invoice Filename Pattern	`einvoice/invoice_settings/filename_pattern`	Text	Default, Website, Store view

Visibility dependencies:

- `einvoice/invoice_settings/generation_mode` is available when `einvoice/general/enabled` is `1`.
- `einvoice/invoice_settings/generation_trigger` is available when `einvoice/general/enabled` is `1`.
- `einvoice/invoice_settings/document_type` is available when `einvoice/general/enabled` is `1`.
- `einvoice/invoice_settings/block_on_error` is available when `einvoice/general/enabled` is `1`.
- `einvoice/invoice_settings/attach_to_email` is available when `einvoice/general/enabled` is `1`.
- `einvoice/invoice_settings/attachment_strategy` is available when `einvoice/invoice_settings/attach_to_email` is `1`.
- `einvoice/invoice_settings/attachment_strategy` is available when `einvoice/general/enabled` is `1`.
- `einvoice/invoice_settings/scheduled_batch_size` is available when `einvoice/invoice_settings/generation_mode` is `scheduled`.
- `einvoice/invoice_settings/scheduled_batch_size` is available when `einvoice/general/enabled` is `1`.
- `einvoice/invoice_settings/recovery_timeout_minutes` is available when `einvoice/general/enabled` is `1`.
- `einvoice/invoice_settings/filename_pattern` is available when `einvoice/general/enabled` is `1`.

Payment Terms Mapping

Field	Configuration path	Input	Scope
Default Payment Terms Template	`einvoice/payment_terms/default_terms_template`	Text area	Default, Website, Store view
Default Payment Means Code	`einvoice/payment_terms/default_payment_means_code`	Text	Default, Website, Store view

Field	Configuration path	Input	Scope
Default Payment Means Code (No IBAN)	`einvoice/payment_terms/default_payment_means_code_no_iban`	Text	Default, Website, Store view
Payment Method Mapping	`einvoice/payment_terms/mapping`	Custom control	Default, Website, Store view

Visibility dependencies:

- `einvoice/payment_terms/default_terms_template` is available when `einvoice/general/enabled` is `1`.
- `einvoice/payment_terms/default_payment_means_code` is available when `einvoice/general/enabled` is `1`.
- `einvoice/payment_terms/default_payment_means_code_no_iban` is available when `einvoice/general/enabled` is `1`.
- `einvoice/payment_terms/mapping` is available when `einvoice/general/enabled` is `1`.

Accounting

Field	Configuration path	Input	Scope
Accounting Source Type	`einvoice/accounting/source_type`	Select	Default, Website, Store view
Order Item Field	`einvoice/accounting/order_item_field`	Select	Default, Website, Store view
Product Attribute	`einvoice/accounting/product_attribute`	Select	Default, Website, Store view
Customer Attribute	`einvoice/accounting/customer_attribute`	Select	Default, Website, Store view

Visibility dependencies:

- `einvoice/accounting/source_type` is available when `einvoice/general/enabled` is `1`.

- `einvoice/accounting/order_item_field` is available when `einvoice/accounting/source_type` is `order_item_field`.
- `einvoice/accounting/order_item_field` is available when `einvoice/general/enabled` is `1`.
- `einvoice/accounting/product_attribute` is available when `einvoice/accounting/source_type` is `product_attribute`.
- `einvoice/accounting/product_attribute` is available when `einvoice/general/enabled` is `1`.
- `einvoice/accounting/customer_attribute` is available when `einvoice/accounting/source_type` is `customer_attribute`.
- `einvoice/accounting/customer_attribute` is available when `einvoice/general/enabled` is `1`.

Credit Memo Settings

Field	Configuration path	Input	Scope
Enable E-Invoice for Credit Memos	`einvoice/creditmemo_settings/enabled`	Select	Default, Website, Store view
Generation Mode	`einvoice/creditmemo_settings/generation_mode`	Select	Default, Website, Store view
Generation Trigger	`einvoice/creditmemo_settings/generation_trigger`	Select	Default, Website, Store view
Document Type Code	`einvoice/creditmemo_settings/document_type`	Select	Default, Website, Store view
Block Credit Memo on E-Invoice Error	`einvoice/creditmemo_settings/block_on_error`	Select	Default, Website, Store view
Attach E-Invoice to Credit Memo Email	`einvoice/creditmemo_settings/attach_to_email`	Select	Default, Website, Store view
Attachment Strategy	`einvoice/creditmemo_settings/attachment_strategy`	Select	Default, Website, Store view

Field	Configuration path	Input	Scope
Scheduled Batch Size	`einvoice/creditmemo_settings/scheduled_batch_size`	Text	Default, Website, Store view
Recovery Timeout (Minutes)	`einvoice/creditmemo_settings/recovery_timeout_minutes`	Text	Default, Website, Store view
Credit Memo Filename Pattern	`einvoice/creditmemo_settings/filename_pattern`	Text	Default, Website, Store view

Visibility dependencies:

- `einvoice/creditmemo_settings/enabled` is available when `einvoice/general/enabled` is `1`.
- `einvoice/creditmemo_settings/generation_mode` is available when `einvoice/creditmemo_settings/enabled` is `1`.
- `einvoice/creditmemo_settings/generation_mode` is available when `einvoice/general/enabled` is `1`.
- `einvoice/creditmemo_settings/generation_trigger` is available when `einvoice/creditmemo_settings/enabled` is `1`.
- `einvoice/creditmemo_settings/generation_trigger` is available when `einvoice/general/enabled` is `1`.
- `einvoice/creditmemo_settings/document_type` is available when `einvoice/creditmemo_settings/enabled` is `1`.
- `einvoice/creditmemo_settings/document_type` is available when `einvoice/general/enabled` is `1`.
- `einvoice/creditmemo_settings/block_on_error` is available when `einvoice/creditmemo_settings/enabled` is `1`.
- `einvoice/creditmemo_settings/block_on_error` is available when `einvoice/general/enabled` is `1`.
- `einvoice/creditmemo_settings/attach_to_email` is available when `einvoice/creditmemo_settings/enabled` is `1`.
- `einvoice/creditmemo_settings/attach_to_email` is available when `einvoice/general/enabled` is `1`.
- `einvoice/creditmemo_settings/attachment_strategy` is available when `einvoice/creditmemo_settings/attach_to_email` is `1`.
- `einvoice/creditmemo_settings/attachment_strategy` is available when `einvoice/creditmemo_settings/enabled` is `1`.
- `einvoice/creditmemo_settings/attachment_strategy` is available when `einvoice/general/enabled` is `1`.
- `einvoice/creditmemo_settings/scheduled_batch_size` is available when `einvoice/creditmemo_settings/generation_mode` is `scheduled`.

- `einvoice/creditmemo_settings/scheduled_batch_size` is available when `einvoice/creditmemo_settings/enabled` is `1`.
- `einvoice/creditmemo_settings/scheduled_batch_size` is available when `einvoice/general/enabled` is `1`.
- `einvoice/creditmemo_settings/recovery_timeout_minutes` is available when `einvoice/creditmemo_settings/enabled` is `1`.
- `einvoice/creditmemo_settings/recovery_timeout_minutes` is available when `einvoice/general/enabled` is `1`.
- `einvoice/creditmemo_settings/filename_pattern` is available when `einvoice/creditmemo_settings/enabled` is `1`.
- `einvoice/creditmemo_settings/filename_pattern` is available when `einvoice/general/enabled` is `1`.

Document Storage

Field	Configuration path	Input	Scope
Storage Strategy	`einvoice/storage/storage_strategy`	Select	Default, Website, Store view
File Storage Path	`einvoice/storage/file_storage_path`	Text	Default, Website, Store view

Visibility dependencies:

- `einvoice/storage/storage_strategy` is available when `einvoice/general/enabled` is `1`.
- `einvoice/storage/file_storage_path` is available when `einvoice/storage/storage_strategy` is `permanent`.
- `einvoice/storage/file_storage_path` is available when `einvoice/general/enabled` is `1`.

Company Information

Field	Configuration path	Input	Scope
Seller Legal Name	`einvoice/company/seller_legal_name`	Text	Default, Website, Store view
VAT ID	`einvoice/company/vat_id`	Text	Default, Website, Store view

Field	Configuration path	Input	Scope
Tax Number	`einvoice/company/tax_number`	Text	Default, Website, Store view
Company Registration Number	`einvoice/company/registration_number`	Text	Default, Website, Store view
Company Registration Scheme	`einvoice/company/registration_scheme`	Select	Default, Website, Store view
SIRET Number	`einvoice/company/siret_number`	Text	Default, Website, Store view
Bank IBAN	`einvoice/company/bank_iban`	Text	Default, Website, Store view
Bank BIC/SWIFT	`einvoice/company/bank_bic`	Text	Default, Website, Store view
Default Payment Terms (Days)	`einvoice/company/payment_terms_days`	Text	Default, Website, Store view
Seller Contact Name	`einvoice/company/seller_contact_name`	Text	Default, Website, Store view
Seller Contact Department	`einvoice/company/seller_contact_department`	Text	Default, Website, Store view
Seller Contact Phone	`einvoice/company/seller_contact_phone`	Text	Default, Website, Store view
Seller Contact Email	`einvoice/company/seller_contact_email`	Text	Default, Website, Store view

Field	Configuration path	Input	Scope
Seller Trading Name	`einvoice/company/seller_trading_name`	Text	Default, Website, Store view
Seller GLN	`einvoice/company/seller_gln`	Text	Default, Website, Store view
Seller DUNS Number	`einvoice/company/seller_duns`	Text	Default, Website, Store view
Seller Leitweg-ID	`einvoice/company/seller_leitweg_id`	Text	Default, Website, Store view

Visibility dependencies:

- `einvoice/company/seller_legal_name` is available when `einvoice/general/enabled` is `1`.
- `einvoice/company/vat_id` is available when `einvoice/general/enabled` is `1`.
- `einvoice/company/tax_number` is available when `einvoice/general/enabled` is `1`.
- `einvoice/company/registration_number` is available when `einvoice/general/enabled` is `1`.
- `einvoice/company/registration_scheme` is available when `einvoice/general/enabled` is `1`.
- `einvoice/company/siret_number` is available when `einvoice/general/enabled` is `1`.
- `einvoice/company/bank_iban` is available when `einvoice/general/enabled` is `1`.
- `einvoice/company/bank_bic` is available when `einvoice/general/enabled` is `1`.
- `einvoice/company/payment_terms_days` is available when `einvoice/general/enabled` is `1`.
- `einvoice/company/seller_contact_name` is available when `einvoice/general/enabled` is `1`.
- `einvoice/company/seller_contact_department` is available when `einvoice/general/enabled` is `1`.
- `einvoice/company/seller_contact_phone` is available when `einvoice/general/enabled` is `1`.
- `einvoice/company/seller_contact_email` is available when

`einvoice/general/enabled` is `1`.

- `einvoice/company/seller_trading_name` is available when `einvoice/general/enabled` is `1`.
- `einvoice/company/seller_gln` is available when `einvoice/general/enabled` is `1`.
- `einvoice/company/seller_duns` is available when `einvoice/general/enabled` is `1`.
- `einvoice/company/seller_leitweg_id` is available when `einvoice/general/enabled` is `1`.

Tax Representative

Field	Configuration path	Input	Scope
Enable Tax Representative	`einvoice/tax_representative/enabled`	Select	Default, Website, Store view
Representative Name	`einvoice/tax_representative/name`	Text	Default, Website, Store view
Representative VAT ID	`einvoice/tax_representative/vat_id`	Text	Default, Website, Store view
Street	`einvoice/tax_representative/street`	Text	Default, Website, Store view
Postcode	`einvoice/tax_representative/postcode`	Text	Default, Website, Store view
City	`einvoice/tax_representative/city`	Text	Default, Website, Store view
Country	`einvoice/tax_representative/country`	Select	Default, Website, Store view

Visibility dependencies:

- `einvoice/tax_representative/enabled` is available when `einvoice/general/enabled` is `1`.
- `einvoice/tax_representative/name` is available when `einvoice/tax_representative/enabled` is `1`.
- `einvoice/tax_representative/name` is available when `einvoice/general/enabled` is `1`.
- `einvoice/tax_representative/vat_id` is available when `einvoice/tax_representative/enabled` is `1`.
- `einvoice/tax_representative/vat_id` is available when `einvoice/general/enabled` is `1`.
- `einvoice/tax_representative/street` is available when `einvoice/tax_representative/enabled` is `1`.
- `einvoice/tax_representative/street` is available when `einvoice/general/enabled` is `1`.
- `einvoice/tax_representative/postcode` is available when `einvoice/tax_representative/enabled` is `1`.
- `einvoice/tax_representative/postcode` is available when `einvoice/general/enabled` is `1`.
- `einvoice/tax_representative/city` is available when `einvoice/tax_representative/enabled` is `1`.
- `einvoice/tax_representative/city` is available when `einvoice/general/enabled` is `1`.
- `einvoice/tax_representative/country` is available when `einvoice/tax_representative/enabled` is `1`.
- `einvoice/tax_representative/country` is available when `einvoice/general/enabled` is `1`.

VAT Classification

Field	Configuration path	Input	Scope
Kleinunternehmer (§19 UStG)	`einvoice/vat/kleinunternehmer`	Select	Default, Website, Store view
Default Category for 0% Lines	`einvoice/vat/default_zero_rate_category`	Select	Default, Website, Store view
Treat Magento Giftcards as Multi-Purpose Voucher	`einvoice/vat/giftcard_multi_purpose`	Select	Default, Website, Store view

Field	Configuration path	Input	Scope
Voucher Override Product Attribute	`einvoice/vat/voucher_product_attribute`	Text	Default, Website, Store view
Exemption Reason: Intra-Community (K)	`einvoice/vat/exemption_reason_k`	Text	Default, Website, Store view
Exemption Reason: Export (G)	`einvoice/vat/exemption_reason_g`	Text	Default, Website, Store view
Exemption Reason: Exempt (E)	`einvoice/vat/exemption_reason_e`	Text	Default, Website, Store view
Exemption Reason: Reverse Charge (AE)	`einvoice/vat/exemption_reason_ae`	Text	Default, Website, Store view
Exemption Reason: Out of Scope (O)	`einvoice/vat/exemption_reason_o`	Text	Default, Website, Store view

Visibility dependencies:

- `einvoice/vat/kleinunternehmer` is available when `einvoice/general/enabled` is `1`.
- `einvoice/vat/default_zero_rate_category` is available when `einvoice/general/enabled` is `1`.
- `einvoice/vat/giftcard_multi_purpose` is available when `einvoice/general/enabled` is `1`.
- `einvoice/vat/voucher_product_attribute` is available when `einvoice/general/enabled` is `1`.
- `einvoice/vat/exemption_reason_k` is available when `einvoice/general/enabled` is `1`.
- `einvoice/vat/exemption_reason_g` is available when `einvoice/general/enabled` is `1`.
- `einvoice/vat/exemption_reason_e` is available when `einvoice/general/enabled` is `1`.
- `einvoice/vat/exemption_reason_ae` is available when `einvoice/general/enabled` is `1`.
- `einvoice/vat/exemption_reason_o` is available when

`einvoice/general/enabled` is `1`.

Document References

Field	Configuration path	Input	Scope
Project Reference (BT-11)	`einvoice/references/project_reference`	Select	Default, Website, Store view
Purchase Order Reference (BT-13)	`einvoice/references/buyer_order_reference`	Select	Default, Website, Store view
Sales Order Reference (BT-14)	`einvoice/references/seller_order_reference`	Select	Default, Website, Store view
Buyer Identifier (BT-46)	`einvoice/references/buyer_identifier`	Select	Default, Website, Store view
Buyer Identifier Scheme	`einvoice/references/buyer_identifier_scheme`	Select	Default, Website, Store view
Buyer Legal Registration Identifier (BT-47)	`einvoice/references/buyer_legal_registration_identifier`	Select	Default, Website, Store view
Buyer Legal Registration Scheme	`einvoice/references/buyer_legal_registration_identifier_scheme`	Select	Default, Website, Store view
Include Order Customer Note (BT-22)	`einvoice/references/include_order_customer_note`	Select	Default, Website, Store view

Visibility dependencies:

- `einvoice/references/include_order_customer_note` is available when `einvoice/general/enabled` is `1`.

Prepayments and Redeemed Credit

Field	Configuration path	Input	Scope
Invoice Prepaid Amount Field (BT-113)	`einvoice/prepayment/invoice_amount_field`	Select	Default, Website, Store view

Field	Configuration path	Input	Scope
Credit Memo Prepaid Amount Field (BT-113)	`einvoice/prepayment/creditmemo_amount_field`	Select	Default, Website, Store view

Invoice Items

Field	Configuration path	Input	Scope
Include Configurable Product Options (BT-154)	`einvoice/item/include_configurable_options`	Select	Default, Website, Store view
Use Selected Simple Product Name (BT-153)	`einvoice/item/use_simple_product_name`	Select	Default, Website, Store view
Default Item Unit Code	`einvoice/item/default_unit_code`	Select	Default, Website, Store view

Visibility dependencies:

- `einvoice/item/include_configurable_options` is available when `einvoice/general/enabled` is `1`.
- `einvoice/item/use_simple_product_name` is available when `einvoice/general/enabled` is `1`.
- `einvoice/item/default_unit_code` is available when `einvoice/general/enabled` is `1`.

Native Checkout Buyer Reference

Field	Configuration path	Input	Scope
Buyer Reference / Leitweg-ID	`einvoice/checkout/buyer_reference_mode`	Select	Default, Website, Store view

Field	Configuration path	Input	Scope
Checkout Field Label	`einvoice/checkout/buyer_reference_label`	Text	Default, Website, Store view
Checkout Help Text	`einvoice/checkout/buyer_reference_help`	Text	Default, Website, Store view
Maximum Length	`einvoice/checkout/buyer_reference_max_length`	Text	Default, Website, Store view

Visibility dependencies:

- `einvoice/checkout/buyer_reference_mode` is available when `einvoice/general/enabled` is `1`.
- `einvoice/checkout/buyer_reference_label` is available when `einvoice/checkout/buyer_reference_mode` is not `disabled`.
- `einvoice/checkout/buyer_reference_help` is available when `einvoice/checkout/buyer_reference_mode` is not `disabled`.
- `einvoice/checkout/buyer_reference_max_length` is available when `einvoice/checkout/buyer_reference_mode` is not `disabled`.

Delivery and Service Date

Field	Configuration path	Input	Scope
Delivery / Service Date Source	`einvoice/delivery/source`	Select	Default, Website, Store view

Visibility dependencies:

- `einvoice/delivery/source` is available when `einvoice/general/enabled` is `1`.

Customer Account Downloads

Field	Configuration path	Input	Scope
Invoice XML	`einvoice/customer_download/invoice_xml`	Select	Default, Website, Store view

Field	Configuration path	Input	Scope
Invoice PDF	`einvoice/customer_download/invoice_pdf`	Select	Default, Website, Store view
Invoice XML ZIP	`einvoice/customer_download/invoice_zip`	Select	Default, Website, Store view
Credit Memo XML	`einvoice/customer_download/creditmemo_xml`	Select	Default, Website, Store view
Credit Memo PDF	`einvoice/customer_download/creditmemo_pdf`	Select	Default, Website, Store view

Validation & Error Handling

Field	Configuration path	Input	Scope
Validation Level	`einvoice/validation/validation_level`	Select	Default, Website, Store view
Strict XSD Validation	`einvoice/validation/strict_xsd_validation`	Select	Default, Website, Store view
Enable Error Notifications	`einvoice/validation/error_notification_enabled`	Select	Default, Website, Store view
Error Notification Email	`einvoice/validation/error_notification_email`	Text	Default, Website, Store view
Error Notification Threshold	`einvoice/validation/error_notification_threshold`	Text	Default, Website, Store view

Visibility dependencies:

- `einvoice/validation/validation_level` is available when `einvoice/general/enabled` is `1`.

- `einvoice/validation/strict_xsd_validation` is available when `einvoice/general/enabled` is `1`.
- `einvoice/validation/error_notification_enabled` is available when `einvoice/general/enabled` is `1`.
- `einvoice/validation/error_notification_email` is available when `einvoice/validation/error_notification_enabled` is `1`.
- `einvoice/validation/error_notification_email` is available when `einvoice/general/enabled` is `1`.
- `einvoice/validation/error_notification_threshold` is available when `einvoice/validation/error_notification_enabled` is `1`.
- `einvoice/validation/error_notification_threshold` is available when `einvoice/general/enabled` is `1`.

REST API Settings

Field	Configuration path	Input	Scope
Include E-Invoice in Invoice API	`einvoice/api/invoice_enabled`	Select	Default, Website, Store view
Include E-Invoice in Credit Memo API	`einvoice/api/creditmemo_enabled`	Select	Default, Website, Store view

Visibility dependencies:

- `einvoice/api/invoice_enabled` is available when `einvoice/general/enabled` is `1`.
- `einvoice/api/creditmemo_enabled` is available when `einvoice/general/enabled` is `1`.

ZUGFeRD / Factur-X Configuration

Field	Configuration path	Input	Scope
ZUGFeRD / Factur-X Profile	`einvoice/zugferd_config/profile`	Select	Default, Website, Store view

Visibility dependencies:

- `einvoice/zugferd_config/profile` is available when `einvoice/general/enabled` is `1`.

PEPPOL BIS Billing 3.0

Field	Configuration path	Input	Scope
Seller Endpoint Scheme (EAS)	`einvoice/peppol_bis/seller_endpoint_scheme`	Select	Default, Website, Store view
Seller Endpoint ID	`einvoice/peppol_bis/seller_endpoint_id`	Text	Default, Website, Store view
CustomizationID override	`einvoice/peppol_bis/customization_id`	Text	Default, Website, Store view
ProfileID override	`einvoice/peppol_bis/profile_id`	Text	Default, Website, Store view

Visibility dependencies:

- `einvoice/peppol_bis/seller_endpoint_scheme` is available when `einvoice/general/enabled` is `1`.
- `einvoice/peppol_bis/seller_endpoint_id` is available when `einvoice/general/enabled` is `1`.
- `einvoice/peppol_bis/customization_id` is available when `einvoice/general/enabled` is `1`.
- `einvoice/peppol_bis/profile_id` is available when `einvoice/general/enabled` is `1`.

XRechnung Configuration

Field	Configuration path	Input	Scope
XRechnung Version	`einvoice/xrechnung_config/version`	Select	Default, Website, Store view

Visibility dependencies:

- `einvoice/xrechnung_config/version` is available when `einvoice/general/enabled` is `1`.

Configuration Testing

Field	Configuration path	Input	Scope
Test Configuration	`einvoice/testing/test_configuration`	Custom control	Default, Website, Store view
Test XSD Schemas	`einvoice/testing/test_schemas`	Custom control	Default, Website, Store view
Test Company Data	`einvoice/testing/test_company_data`	Custom control	Default, Website, Store view

REST API

The module adds authenticated generation endpoints and can enrich Magento's invoice and credit-memo repository responses with document contents. Content enrichment is disabled by default because invoice XML and PDF can be large and sensitive.

Authentication and permissions

Use normal Magento REST authentication. The integration or admin token needs the specific E-Invoice ACL resource for the operation:

- `MageB2B_EInvoice::invoice_generate` for the single-invoice route;
- `MageB2B_EInvoice::creditmemo_generate` for the single-credit-memo route;
- `MageB2B_EInvoice::invoice_mass_actions` for the bulk invoice route;
- `MageB2B_EInvoice::creditmemo_mass_actions` for the bulk credit-memo route.

Do not expose these routes to anonymous storefront clients.

Generate one document

```
POST /rest/V1/einvoice/invoice/{invoiceId}/generate
POST /rest/V1/einvoice/creditmemo/{creditmemoId}/generate
```

`invoiceId` and `creditmemoId` are numeric Magento entity IDs, not increment IDs printed on the document.

The result contains:

```
{
  "success": true,
  "entity_id": 42,
  "entity_type": "invoice",
  "status": "generated",
  "format": "zugferd",
  "message": "E-Invoice generated successfully",
  "skipped": false
}
```

Exact Magento REST serialization may wrap interface data according to your platform version, but these are the service-contract fields.

Generate a batch

```
POST /rest/V1/einvoice/invoices/generate
```

```
Content-Type: application/json

{
  "invoiceIds": [42, 43, 44]
}
```

For credit memos:

```
POST /rest/V1/einvoice/creditmemos/generate
Content-Type: application/json

{
  "creditmemoIds": [17, 18]
}
```

The bulk result returns `total_count`, `success_count`, `error_count`, `skipped_count` and one generation result per entity. Inspect individual results even when the request itself returns successfully.

The `force` parameter

All generation endpoints accept `force` (default `false`). Without it, a document already marked `generated` is returned as `skipped`, and an `error` document is reported with "Force is required to retry a failed E-Invoice generation." With `"force": true`, both cases regenerate and overwrite the stored document.

Use `force` only deliberately — regeneration is an explicit operational decision, not a default for integrations.

Include document content in Magento sales APIs

Enable these separately per store view:

- **Include E-Invoice in Invoice API**
- **Include E-Invoice in Credit Memo API**

Then normal repository reads can include:

```
GET /rest/V1/invoices/{invoiceId}
GET /rest/V1/creditmemos/{creditmemoId}
```

```
{
  "extension_attributes": {
    "einvoice_xml": "<?xml version=\"1.0\" ...",
    "einvoice_pdf": "JVBERi0xLjcK..."
```

```
    }
}
```

- `einvoice_xml` is the XML string.
- `einvoice_pdf` is base64-encoded and is `null` for XML-only formats.
- both are `null` when no document is available.
- with on-demand storage, reading the repository can trigger document generation.

That last point matters for performance and side effects. Do not enable API enrichment on broad invoice-list integrations without measuring payload size and generation behavior.

Checkout extension attributes

Two additional extension attributes are declared for headless or custom-checkout integrations:

Attribute	Declared on	Written through	Effect
`einvoice_buyer_reference`	`Magento\Quote\Api\Data\PaymentInterface`	`POST /V1/carts/{cartId}/payment-information` (and the `carts/mine` / `guest-carts` variants) as `paymentMethod.extension_attributes.einvoice_buyer_reference`	Copied onto `sales_order.einvoice_buyer_reference` at order placement; used as Buyer Reference / Leitweg-ID (BT-10) and, with order-reference detection, marks the order as B2G
`peppol_endpoint_id` / `peppol_endpoint_scheme`	`Magento\Sales\Api\Data\OrderInterface`	No module write path — set by custom code on the order	Read first by the PEPPOL BIS formatter as the buyer endpoint; see Buyer endpoint resolution

The module stores `einvoice_buyer_reference` in real `quote`/`sales_order` columns. The PEPPOL endpoint attributes are a read-time integration point: the module declares them but keeps no storage for them, so an integration must populate the order's extension attributes before generation.

Security and data handling

E-invoices contain company, address, tax, payment and purchase information. Limit token permissions, avoid logging response bodies, and do not cache enriched API responses in a public layer.

What the API does not provide

- no GraphQL fields in this module;
- no PEPPOL access-point transmission;
- no government-portal upload;
- no delivery-status callback model.

Related

- CLI Commands
- Status Tracking
- Document Storage, Email and Downloads

CLI Commands

The module provides generation, XML XSD validation, amount-checking and storage-migration commands. Run them from the Magento root as the normal deployment user.

Generate documents

Single entity:

```
php bin/magento einvoice:generate --invoice-id=42
php bin/magento einvoice:generate --creditmemo-id=17
```

Multiple entities:

```
php bin/magento einvoice:generate --invoice-ids=42,43,44
php bin/magento einvoice:generate --creditmemo-ids=17,18
```

Use `-v` to show the per-entity table for a batch. Every ID is a numeric entity ID, not an increment ID such as `000000042`. The command runs without `force`: already `generated` entities are skipped, and an `error` entity cannot be retried this way — use the admin detail-page action or the REST `force` flag for that.

The command uses the document's store-view configuration and the store-level default format. It does not send the result to a recipient.

Validate an XML file against its bundled XSD

Use the file path and the matching CII format:

```
php bin/magento einvoice:validate
var/einvoice/invoice-000000042-xrechnung.xml \
  --format=xrechnung --profile=3.0
```

Supported XSD format codes are `zugferd`, `facturx`, `xrechnung` and `en16931`. The profile is optional. It defaults to `3.0` for XRechnung and `en16931` for the other supported formats. PEPPOL BIS is UBL and is not an option for this command; use the admin validation action or the module's PEPPOL-specific checks, then apply the provider's Schematron/business-rule validator.

The command checks XML against the selected bundled schema. A successful result does not prove tax semantics, PEPPOL acceptance, PDF embedding or transmission.

Verify CII amounts from an actual file

The safest usage is to pass the exact XML path:

```
php bin/magento einvoice:verify-amounts \
  --file=var/einvoice/invoice-000000042-zugferd.xml
```

You can change the comparison tolerance when the accounting team has approved it:

```
php bin/magento einvoice:verify-amounts \
  --file=var/einvoice/invoice-000000042-zugferd.xml \
  --tolerance=0.01
```

The command reads CII summation values and checks:

Rule	Check
BR-CO-13	tax basis equals line total minus allowances plus charges
BR-CO-15	grand total equals tax basis plus tax total plus rounding
BR-CO-16	payable amount equals grand total minus prepaid amount

It exits `0` when all checks pass and `1` for a mismatch or unreadable file.

Entity-ID verification

The command also exposes:

```
php bin/magento einvoice:verify-amounts --invoice-id=42
php bin/magento einvoice:verify-amounts --creditmemo-id=17
```

These options load the persisted private XML artifact stored for that entity — the file must exist (permanent storage). For on-demand storage or a file elsewhere on disk, use `--file` with the actual path.

The amount reader is based on the CII library. Do not use it as proof of PEPPOL UBL correctness.

Migrate public artifacts to private storage

Documents written by older module versions under `pub/media` can be moved into the private `var/` storage:

```
# dry run first: report planned copies without changing anything
php bin/magento einvoice:storage:migrate-public --entity-
type=invoice --dry-run

# migrate a batch
```

```
php bin/magento einvoice:storage:migrate-public --entity-
type=invoice --batch-size=100

# resume after a given entity ID
php bin/magento einvoice:storage:migrate-public --entity-
type=creditmemo --after-id=500
```

Options:

- `--entity-type` (required): `invoice` or `creditmemo`;
- `--after-id`: resume after this entity ID (default `0`);
- `--batch-size`: entities per run, `1`–`10000` (default `100`);
- `--dry-run`: verify public sources and report planned copies without changing files;
- `--cleanup-public`: delete public copies after a completed migration run;
- `--confirm-public-cleanup`: additionally confirm deletion — only applied when the private copy has the same size and SHA-256 hash.

What amount verification does not prove

It checks a small set of totals. It does not validate addresses, identifiers, VAT category choices, profiles, buyer references, Schematron rules, PDF embedding or delivery acceptance.

Related

- REST API
- VAT Classification
- Troubleshooting

Lifecycle events

Integrations can observe the generation and validation lifecycle without changing the formatter. Invoice and credit memo generators use the same event names, with the entity key identifying the document type.

Event	Payload for an invoice	Payload for a credit memo
`einvoice_before_generate`	`invoice`, `format`	`creditmemo`, `format`
`einvoice_after_generate`	`invoice`, `format`, `document`	`creditmemo`, `format`, `document`
`einvoice_generation_failed`	`invoice`, `format`, `exception`	`creditmemo`, `format`, `exception`
`einvoice_before_validate`	`invoice`, `format`	`creditmemo`, `format`
`einvoice_after_validate`	`invoice`, `format`, `document`, `validation_result`	`creditmemo`, `format`, `document`, `validation_result`

Safe uses

Use `after_generate` to enqueue a hand-off to a separate delivery service, or `after_validate` to record a local diagnostic result. Keep handlers short and idempotent. Do not transmit customer data from an event observer without an explicit integration boundary and access controls.

Failure handling

The `einvoice_generation_failed` event carries the exception from the failed operation. Sanitize messages before sending them to external systems or support logs.

These events do not provide network delivery receipts. The module creates local documents; a PEPPOL access point, portal or recipient system remains responsible for transport and acceptance feedback.

Common Issues

Start with the document's store view, numeric entity ID, selected format, mode and exact status. Most problems fall into one of four places: source data, generation, storage or downstream delivery.

No document was generated

1. Open the invoice or credit memo and read its E-Invoice Information section.
2. Confirm **Enable E-Invoicing** in the document's store view.
3. For credit memos, also confirm **Enable Credit Memo E-Invoicing**.
4. Check that the generation mode is not `disabled` and that the **Generation Trigger** matches the event you used (invoice creation vs. invoice payment; **Manual Only** suppresses automatic processing entirely).
5. Try one manual generation action.

If manual generation works, the formatter and source data are probably usable; continue with queue/cron diagnostics. If it fails, work from the stored error instead of changing several settings at once.

Status stays scheduled or queued

Message Queue mode

Confirm the correct consumer is supervised and running:

```
php bin/magento queue:consumers:list
php bin/magento queue:consumers:start mageb2b.einvoice.generate
php bin/magento queue:consumers:start
mageb2b.einvoice.generate.creditmemo
```

The first consumer handles invoices; the second handles credit memos. Also inspect your configured queue backend for backlog or failed messages.

Scheduled mode

Confirm Magento cron is running and inspect `cron_schedule` for the single worker:

Job	Schedule
`einvoice_process_scheduled`	minute `00` every hour

The worker processes due `scheduled` rows per store up to each flow's **Scheduled Batch Size** (default `100`) and reclaims `queued`/`processing` rows older than the flow's **Recovery Timeout (Minutes)** (default `30`). A `scheduled` row that never advances

usually means cron is not running, the store is disabled, or the batch is consumed by earlier rows.

Running this once can help diagnose scheduling:

```
php bin/magento cron:run --group=default
```

It does not replace the production system cron.

Status is error

Open the document and copy the exact error message. Then check:

- store-view seller/company data;
- billing address, company and VAT ID on the order;
- selected format, profile or XRechnung version;
- payment terms and payment means code;
- storage path and write access;
- Magento's normal PDF generation for hybrid formats.

Correct the cause before retrying — `error` rows are not retried automatically; use the detail-page **Generate E-Invoice** action (it applies `force` for `error`) or REST with `force: true`. No retry can repair missing or wrong business data.

Factur-X is selected but rejected

Confirm that **Enable E-Invoicing** is enabled and that **Default B2B Format** is Factur-X in the invoice's store view. The formatter reads that setting. Do not create a hidden database setting as a workaround.

XML exists but hybrid PDF does not

ZUGFeRD and Factur-X depend on Magento's PDF renderer before the XML is embedded.

1. Generate the normal Magento invoice or credit-memo PDF.
2. Confirm `horstoeko/zugferd` is installed.
3. Review logs for `Hybrid PDF preparation failed` or an embed error.
4. Check the stored PDF path and actual file.
5. Verify memory, disk space and media-directory access.

XRechnung, EN 16931 and PEPPOL BIS are XML-only; the absence of an e-invoice PDF is expected.

Files are missing

Check **Storage Strategy** first.

- **Permanent** writes XML and, for hybrid formats, PDF below the configured path under Magento's private `var/` directory (default `var/einvoice/`).
- **On demand** intentionally leaves no permanent files and regenerates when an action asks for the document.

Do not apply blanket `chmod -R` or `chown -R` commands copied from a guide. Compare the `var/` storage directory with the ownership and deployment permissions used by the rest of your Magento installation.

Filename is not what the pattern suggests

The file managers replace entity/increment ID, `{order_increment_id}`, format, type, date and datetime tokens — see the full list in the Configuration Guide. An unrecognized token is not expanded; the filename sanitizer then turns its braces and other unsafe characters into dashes, so a name like `invoice-000042-ordernumber-zugferd.xml` points at a misspelled variable. A stored file whose name still shows an `-order_increment_id-` fragment was generated before the module learned that variable — regenerate the document to produce the corrected name.

Amount verification cannot find the file

`einvoice:verify-amounts --invoice-id` / `--creditmemo-id` load the persisted private XML artifact of that entity directly. To check a file on disk instead, pass its path with `--file`:

```
php bin/magento einvoice:verify-amounts --
file=var/einvoice/<actual-file>.xml
```

The command cross-checks the XML's monetary values against Magento's totals (option `--tolerance`, default `0.01` in the invoice currency). The reader is not a PEPPOL UBL validator.

XRechnung is rejected by a portal

The internal validator intentionally does not require a Leitweg-ID for its B2B use case. A public-sector receiver can require that value and additional national rules.

Confirm the selected XRechnung version, seller contact, buyer/routing reference and the portal's current rule set. The extension generates XML but does not perform portal submission.

PEPPOL provider rejects the document

Check the complete exchange contract:

- seller endpoint ID and scheme;

- buyer endpoint and scheme;
- actual participant registration;
- BuyerReference rather than its invoice-number fallback;
- CustomizationID and ProfileID;
- provider business-rule or Schematron report.

Magento's `generated` status means the UBL file was created. It is not a network delivery status.

Email has no attachment

Confirm that attachments are enabled for the correct flow and store view. Then check the strategy:

- automatic: PDF for hybrid, XML for XML-only;
- PDF only: nothing for an XML-only format;
- both: only content that actually exists is attached.

With queued or scheduled generation, the transactional email may be sent before the document exists. Align email timing with generation or use an integration that sends after success.

Customer cannot download a document

The storefront links require a logged-in customer who owns the invoice or credit memo and a generated document. Check the five **Customer Account Downloads** switches first — invoice XML, invoice PDF, invoice XML ZIP, credit-memo XML and credit-memo PDF can be enabled separately and are all off by default. PDF downloads exist only for hybrid formats; XRechnung, EN 16931 and PEPPOL BIS produce XML only.

Useful support bundle

Provide:

- installed package and Magento compatibility details;
- store view and selected format/profile;
- numeric invoice or credit-memo entity ID;
- mode, trigger and current status;
- exact sanitized error;
- relevant `system.log`/`exception.log` lines;
- validator output without customer or bank data.

Related

- Error Handling and Recovery

- Generation Modes and Triggers
- Frequently Asked Questions

FAQ

Which format should we use?

Use the format named by the recipient or their delivery provider. For a German B2B customer that wants one readable file with machine data, ZUGFeRD is often practical. Use Factur-X when the French profile is required, XRechnung for recipients that explicitly request it, EN 16931 for a CII-based European workflow, and PEPPOL BIS only when the next system expects its UBL profile.

Does the extension send invoices through PEPPOL?

No. It generates PEPPOL BIS Billing 3.0 UBL. Participant registration, access-point lookup, network transmission and delivery receipts belong to a PEPPOL access point or integration layer.

Does XRechnung generation upload to ZRE or OZG-RE?

No. The extension creates XML. Portal registration, routing and upload are separate tasks.

Are invoices and credit memos supported?

Yes. Credit-memo support is disabled by default and has its own generation mode, trigger, document type, attachment setting and filename pattern. The supported formatters cover all five available formats for both invoices and credit memos.

What is the difference between document types 381 and 384?

`381` represents a credit note. `384` represents a corrected invoice and the formatter applies negative quantities and amounts for that model. Confirm which representation the receiver expects before changing the default.

Can each customer use a different format?

Not through a standard customer field. Automatic generation reads the store-view **Default B2B Format**. A customer-specific decision requires custom integration code around the generator or separate store views with deliberate configuration.

Can we select a different format for credit memos?

Not through a separate credit-memo format setting. Credit memos use the same store-level default format as invoices.

What do the status values mean?

- `scheduled`: waiting for the hourly cron worker (`scheduled` generation mode);
- `queued`: published to the message queue, waiting for the consumer;
- `processing`: a worker or the current request is generating the document;
- `generated`: generation completed and metadata was stored;
- `error`: the last attempt failed; inspect the stored error message;
- `disabled`: automatic generation mode is disabled for that document flow.

Does `generated` prove the recipient will accept the file?

No. It means Magento completed its generation lifecycle. Receiver-specific business rules, procurement references, access-point requirements and transport remain separate.

What does strict XSD validation check?

It validates XML structure against the bundled schema selected for the format and profile. It is not a complete legal, tax or receiver-acceptance audit. PEPPOL and government recipients commonly apply additional rule sets.

Why is there no PDF for XRechnung, EN 16931 or PEPPOL BIS?

Those formatters create XML-only documents. Hybrid PDFs are created for ZUGFeRD and Factur-X. If people also need a visual invoice, keep Magento's normal invoice PDF in the process.

What does the Automatic email attachment strategy send?

It sends the PDF for a hybrid document and XML for an XML-only document. **Both** sends both when both contents exist. **PDF only** cannot invent a PDF for an XML-only format.

Where are files stored?

With permanent storage, invoices default to `var/einvoice/` and credit memos to `var/einvoice/creditmemo/` — Magento's private `var/` directory, not public `pub/media`. Downloads run through controlled admin and customer-account actions. With on-demand storage, files are regenerated when an action requests them rather than kept as a permanent archive. `einvoice:storage:migrate-public` moves artifacts written by older module versions into private storage.

Can customers download an e-invoice?

Yes, when the document is generated and the customer owns it. Five **Customer Account Downloads** switches control the offer: invoice XML, invoice PDF and an invoice XML ZIP,

plus credit-memo XML and PDF. PDF applies to hybrid formats (ZUGFeRD, Factur-X); XML-only formats provide XML downloads.

Do REST and CLI commands use invoice numbers?

No. Their `invoiceId` and `creditmemoId` values are numeric Magento entity IDs, not visible increment IDs such as `000000123`.

Does `force: true` regenerate an existing document?

Yes. Without `force`, a `generated` document is skipped and an `error` document cannot be retried. With `force: true` the REST endpoints and the management service regenerate both cases. The admin detail-page action applies `force` automatically for `error` rows; grid mass actions and `einvoice:generate` do not.

Why did an invoice not generate even though e-invoicing is enabled?

The **Generation Trigger** must match the sales event: **On Invoice Creation** reacts to invoice commits, **On Invoice Payment** reacts to payment, and **Manual Only** never starts automatic processing. A trigger that does not match the event leaves the document untouched; generation mode **Disabled** additionally records the `disabled` status.

Can Block on Error guarantee that Magento creates no invoice?

No. Invoice generation runs from an after-commit sales event. In immediate mode, the setting can propagate a generation failure back to the request, but it cannot reliably roll back an invoice already committed to the database. Queue and scheduled failures happen later and cannot block creation.

Why does Factur-X fail even when it is selected?

Factur-X reads **Default B2B Format** in the invoice's store view. Confirm that setting and the general enable switch, then retry. Do not add an undocumented configuration row as a workaround.

What should we send to support?

Include the installed package and Magento compatibility details, store view, selected format/profile, generation mode, numeric entity ID, status, exact error message and sanitized validation output. Do not send complete invoices or customer data unless a secure support channel specifically requests them.