



Admin workflows

E-Invoice Documentation

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

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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.

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