Configuration

E-Invoice Documentation

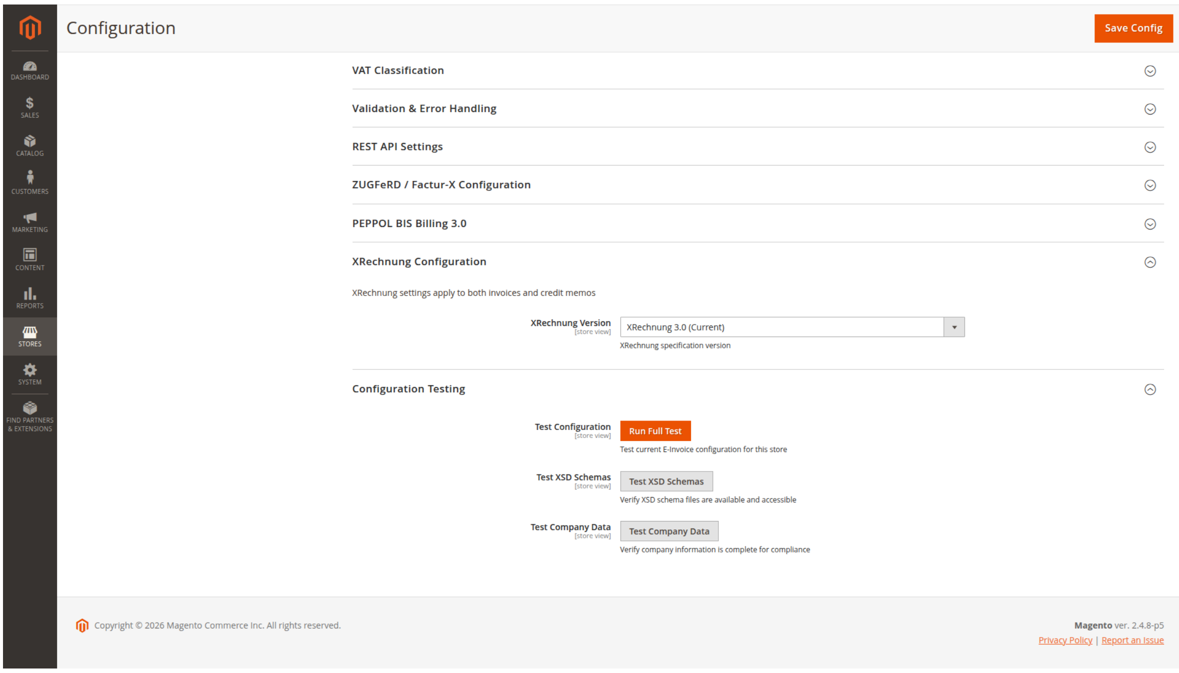
Guide for Magento administrators, technical project owners, and implementation teams.

LAST UPDATED	SOURCE	EXTENSION
2026-09-20	Open this article online	Magento 2 Extension E-Invoice

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

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

Invoice Settings

Setting	Default	Notes
Generation Mode	Immediate	`disabled`, `immediate`, `queued`, `scheduled`

Setting	Default	Notes
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

Setting	Default	Notes
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}`	-	✓
`{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`)

The admin hint lists `{order_increment_id}`, but the file managers do not replace that token. Do not use it in a production filename pattern.

Company Information

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

Field	Notes
VAT ID	Required
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
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 → `O`
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

Setting	Default	Notes
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`)
Payment Method Mapping	Override terms and means code per payment method

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 enabled by default.

Setting	Default	Notes
Invoice XML	Yes	XML download on the invoice page
Invoice PDF	Yes	PDF download (hybrid documents)
Invoice XML ZIP	Yes	Multi-document ZIP download
Credit Memo XML	Yes	XML download on the credit-memo page
Credit Memo PDF	Yes	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

Setting	Default	Notes
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`

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

Config path	Admin label	Type

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`
`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`

Config path	Admin label	Type
`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`
`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`

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

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

Config path	Admin label	Type
`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`

Config path	Admin label	Type
`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`

Config path	Admin label	Type
`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`