



Go-Live Checklist

E-Invoice Documentation

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

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[Magento 2 Extension E-Invoice](#)

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/`.
- ☐ PEPOL 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.