

Inexchange E-Document Connector

User Guide

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1. About the application

The **Inexchange E-Document Connector** enables electronic document exchange through the Inexchange platform directly from **Microsoft Dynamics 365 Business Central**.

The application is built on Microsoft's **E-Document Core framework** and allows companies to send electronic sales invoices, credit memos, and service documents in a secure and standardized way.

Key benefits include:

- Seamless electronic invoicing via Inexchange
- Faster delivery and improved traceability
- Status monitoring of sent documents
- Electronic documents will be sent in **PEPPOL BIS 3.0** format to Inexchange

For more information, please visit the following websites.

<https://inexchange.se>

<https://www.sherpas.se/inexchange-for-bc>

2. Supported languages

The application supports the following languages:

- **English**
- **Swedish**

The user interface and messages will adapt to the selected Business Central language.

3. PEPPOL format

This application manages the integration between Business Central and Inexchange only. Invoices and credit memos are sent in the standard **PEPPOL BIS 3.0** format used by Business Central. Any existing adjustments to the PEPPOL format should remain compatible with the integration.

4. Business Central Installation and Configuration

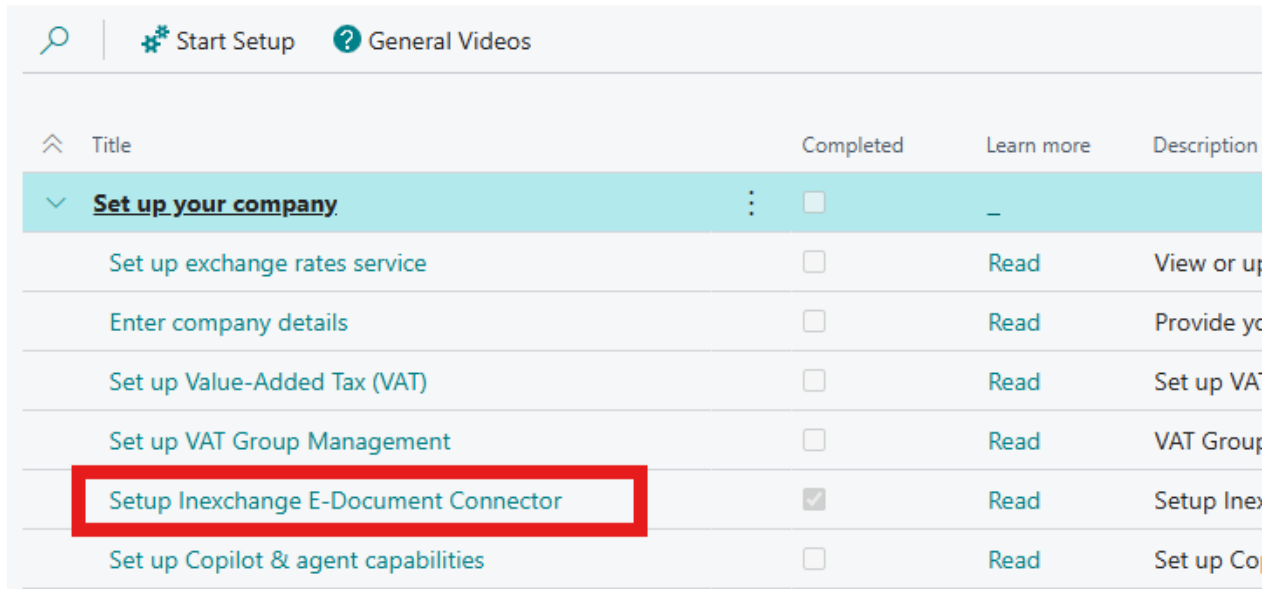
The installation is performed by downloading the application from **Microsoft AppSource**.

Once the app is installed, a **setup wizard** is available to guide the initial configuration of the E-Document service.

4.1. Assisted Setup

After installation go to Assisted Setup page, start the wizard “Setup Inexchange E-Document Connector”.

Assisted Setup



↑ Title	Completed	Learn more	Description
↓ Set up your company	<input type="checkbox"/>	–	
Set up exchange rates service	<input type="checkbox"/>	Read	View or up
Enter company details	<input type="checkbox"/>	Read	Provide yc
Set up Value-Added Tax (VAT)	<input type="checkbox"/>	Read	Set up VA
Set up VAT Group Management	<input type="checkbox"/>	Read	VAT Group
Setup Inexchange E-Document Connector	<input checked="" type="checkbox"/>	Read	Setup Inex
Set up Copilot & agent capabilities	<input type="checkbox"/>	Read	Set up Co

The wizard must be **run in every company** that will use the Inexchange service.

Steps:

1. Welcome – click next to proceed
2. Terms and Conditions – accept and click next to proceed
3. E-Documents
 - a. Sales invoice and credit memo are selected by default
 - b. It is also possible to select Service invoice and credit memo
4. E-Document service settings

Information about configuration. Here is also an option to select if you want invoices to be sent automatically when they are posted. **If not, selected documents will be sent when “Post and send...” action is used.**
5. Final step, click “Complete” to complete the setup.

5. E-Document Service

In the **E-Document Service** list you will find the Inexchange integration.

Code	Description	Document Format	Service Integration	Service Integration (Legacy)
SGRINEX-EDOC-SERVICE	Inexchange E-Doc. Service	PEPPOL BIS 3.0	Inexchange	No Integration

E-Document Service page – from this page you can open the configuration page.

E-Document Service ✎ 🔗 + 🗑️ ✓ Saved 🔗

SGRINEX-EDOC-SERVICE

[⚙️ Set up service integration](#) [📄 Configure documents to export.](#) [↓ Receive](#) | [More options](#)

General

Code SGRINEX-EDOC-SERVICE Document Format PEPPOL BIS 3.0
 Description Inexchange E-Doc. Service Service Integration Inexchange

“Set up service integration” will open the configuration page.

Inexchange E-Doc. Config. - SGRINEX-EDOC-SER... ↗ ✕

Environment

Tenant test.com
 Environment Warning: This is a sandbox environment.

Settings

Send Invoice On Post

OK

Cancel

Environment

Tenant – information about your tenant’s name.

Environment – if you are in a Sandbox a warning will show.

⚠️ This App runs against Inexchange production.

Settings

“Send Invoice on Post” – if toggled the invoice will be sent automatically when the document is posted. Otherwise, the invoice will be sent when you use “Post and Send...” action.

6. Document Sending Profile

If customers are to receive electronic documents through Inexchange, this document sending profile needs to be assigned to the customer on the customer card page.

Document Sending Profiles 🔖 📄 ↗

🔍 | 📄 | + New | Manage 📄 🔍 ☰

Code ↑ ▼	Description	Default
SGRINEX-EDOC-SERVICE	Inexchange E-Doc. Service	<input type="checkbox"/>

7. Workflow

A workflow is configured automatically by the Inexchange setup wizard and is used by the document sending profile.

Workflows

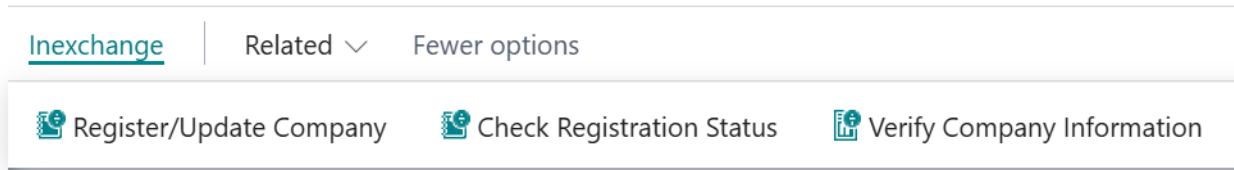
🔍 | 📄 New Workflow from Template | ▼ [Home](#) | Manage | Power Automate | More options

📄 Import from File | 📄 Export to File

⏶ Description	Source
▼ <u>E-dokument</u>	⋮
Skicka E-Dokument till Inexchange	Business Central

8. Company Information

Under **Company Information**, the company can be registered, updated and verified with Inexchange.



Inexchange menu contains the following actions:

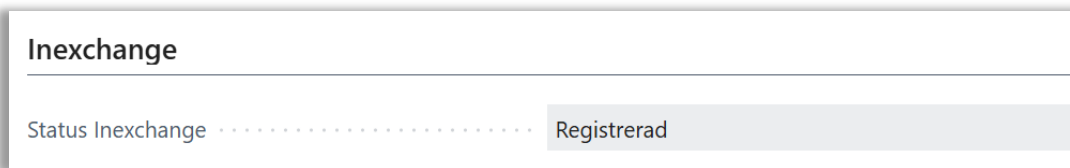
“Register/Update Company” – registers/updates your company with Inexchange.

“Check Registration Status” – check status for registration.

“Verify Company Information” – get company information from Inexchange.

Correct and verified company information is required before electronic documents can be sent.

Once the company has been registered with Inexchange a company id will be updated and the status will be set to “Registered”. This information is located at the bottom of the Company Information page under the Inexchange heading.



9. Customer

Customers who should receive **electronic invoices** must be assigned a **specific document sending profile**.

Customer Card ✎ 📄 + 🗑️

60000 · Företaget AB

Home Request Approval New Document Prices & Discounts Customer Report **Inexchange** More options

👤 Verify Customer 🔄 Update Customer 👤 Register Van Provider Info

General Show less

No.	60000	...	Salesperson Code		▼
Name	Företaget AB		Responsibility Center		▼
IC Partner Code		▼	Document Sending P...	SGRINEX-EDOC-SERVICE	▼
Balance (LCY)		106 475,00	Total Sales - Fiscal Year ...		85 180,00
Balance (LCY) As Ven... ..		0,00	Costs (LCY)		66 435,00

Inexchange menu contains the following actions:

Home Request Approval New Document Prices & Discounts Customer Report **Inexchange**

👤 Verify Customer 🔄 Update Customer 👤 Register Van Provider Info

“Verify Customer” – Gets customer information from Inexchange and displays it in a message box. It will also set the customer as verified. A customer must be verified before an invoice can be sent.

“Update Customer” – Gets customer information from Inexchange and displays it in a new page where it is possible to select information from Inexchange to update on current customer.

“Register Van Provider Info” – if customer doesn’t exist in Inexchange’s network it is possible to register the customer and Inexchange will add it to its network.

Once the customer has been verified, you can see this at the bottom of the page under the heading Inexchange.

Inexchange

Verified by InExchange Inexchange Company Id 9b17c9aa-743e

9.1. Update Customer

You can retrieve information from Inexchange and update the customer in BC with the selected information. The page that opens displays the current value for the customer as well as the information available from Inexchange. Select the fields you wish to update for the customer and then click **“Update Customer”**. Fields that have no value from Inexchange or are identical cannot be selected.

Update Customer ✓ Saved [🔖](#) [📄](#) [↗](#)

[🔍](#) [🔖](#) [📄](#) **Edit List** [📄](#) Update Customer [🔗](#) [🔍](#) [☰](#)

Field	Current Value	Inexchange Value	Update
→ <u>Name</u>	⋮ Företaget AB	<i>Anders Mottagningstest AB</i>	<input checked="" type="checkbox"/>
Address	Testgatan 1		<input type="checkbox"/>

9.2. Register Van Provider Info

If the customer does not exist in Inexchange, you can register the customer using this function. Complete the customer information with the VAN provider and send the details to Inexchange. Click **“OK”** at the bottom of the page to submit the information to Inexchange.

Enter Van Provider Info - 60000 · Företaget AB [↗](#) [✕](#)

Van Operator Info

Van Operator	<input type="text"/>	Van Contact Phone	<input type="text"/>
Van Contact Name	<input type="text"/>	Van Contact Email	<input type="text"/>

Customer Info

Customer Name	<input type="text" value="Företaget AB"/>	Customer Registration... ..	<input type="text" value="556003-8860"/>
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10. E-Document

When a sales invoice is **posted and sent via Inexchange**, it can be tracked on the **E-Documents** page.

This list contains all invoice documents, both that haven't been sent and does have been sent.

The **"Inexchange Status"** column shows whether the invoice has been sent. The statuses used by Inexchange are listed below.

Document Entry No ↓	Bill-to/Pay-to No.	Bill-to/Pay-to Name	Document Type	Document No.	Document Date	Electronic Document Status	Inexchange Status
30	60000	Foretaget AB	Sales Invoice	103317	2027-06-01	Error	Stopped
29	60000	Foretaget AB	Sales Invoice	103316	2027-06-01	Processed	Delivered
28	60000	Foretaget AB	Sales Invoice	103315	2027-06-01	Error	Stopped
27	60000	Foretaget AB	Sales Invoice	103314	2027-06-01	Processed	Delivered

Inexchange status

Status	Description
Not sent	Default status before the document has been sent
Pending	The document has been sent from Business Central
Pending in platform	The document is being processed by Inexchange
Delivered	The document has been successfully delivered
Error	An error occurred during transmission

10.1. E-Document Card

The E-Document Card page provides more information about the e-document.

When the document is sent to Inexchange the E-Document will be updated with references from Inexchange. This information can be useful in case support is needed.

E-Document ✎ ↗ + 🗑

42 · Företaget AB

📄 Send Document
🔄 Recreate Document
🔄 Update Document Status
Actions ▾
Related ▾
Automate ▾
Fewer options

General Show less

Document	Sales Invoice - 103329	Amount Excluding tax	80,00
Document Status	Processed	Amount Including Tax	100,00
Direction	Outgoing	Currency Code	
Workflow Code	SGRINEX-EDOC-SERVICE	Bill-to/Pay-to No.	60000
Incoming E-Document No.		Bill-to/Pay-to Name	Företaget AB
Document Type	Sales Invoice	Posting Date	2027-06-01
Document No.	103329	Inexchange Document Id	868dfb83-eab3-4225-8b04-153ace9...
Document Date	2027-06-01	Inexchange Document Uri	urn:inexchangedocument:83ebfd29-...
Due Date	2027-07-01	Send Document	<input type="checkbox"/>
Order No.			

If an E-Document hasn't been sent and you want to send it later, it is possible to do that.

Actions ▾
Related ▾

- 🔄 Set Send Document
- 📄 Send to Inexchange

"Send Document" toggle can be set by clicking on then **"Set Send Document"** action under the Actions menu.

Inexchange Document Uri urn:inexchangedocument:83ebfd29-...

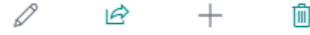
Send Document

"Send to Inexchange" – to manually send a document to Inexchange. When you do this, you also need to manually update the status of the document by clicking **"Update Document Status"**.

11. Posted Sales/Service Documents

Posted sales/service documents have additional information added regarding Inexchange status, send date and last update date.

Posted Sales Invoice



103316 · Företaget AB

[Home](#) | [Print/Send](#) | [Invoice](#) | [Incoming Document](#) | [Related](#) ▾ | [Automate](#) ▾ | [Fewer options](#)

Update Document | Correct | ▾ | Find entries... | Track Package | Change Payment Service

General

Show more

No.	103316	Order No.	
Customer	Företaget AB	Cancelled	No
Contact	Nicklas Svensson	Closed	<input type="checkbox"/>
Posting Date	2027-06-01	Dispute Status	
VAT Date	2027-06-01	Inexchange	
Due Date	2027-07-01	Status	Delivered
Promised Pay Date		Sent	2026-04-17 16:32
Quote No.		Last Updated	2026-04-17 16:37

12. Support

For support regarding the **Inexchange E-Document Connector**, please contact Sherpas:
inexchange_bc@sherpas.se