

PAGERO



Pagero E-Invoicing

User's Guide v2

Pagero E-Invoicing is an add-on/extension that enables sending invoices (electronic, printed and PDF via e-mail) through a single pre-developed format and communication.

The add-on/extension introduces new fields and functionality into 2016, 2017, 2018 and Microsoft Dynamics 365 Business Central that covers the most common requirements for electronic invoicing within the B2B and B2G section. Pagero E-invoicing is tightly integrated with Pagero Online, a cloud-based network platform for the transfer of business documents within the purchase-to-pay, order-to-cash and logistic-to-pay (TMS) processes.

The purpose of this guide is to explain certain steps and activities to enable sending of invoices from your ERP to Pagero Online.



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1 Getting started

Sign Up Your Company with Pagero Online

If your company is already using Pagero Online, skip this step and proceed with the [Initial Setup](#) instead. If you haven't used Pagero Online before and need to register your company, please use the sign-up wizard available in your ERP. To access the sign-up wizard search for **Pagero Online Company Sign Up**.

The wizard contains several steps that guides you through the sign-up process. The following is a short description of these steps.

- Step 1 (Primary company information)

PAGERO ONLINE COMPANY SIGN UP

Project Code PageroProjectCode

Company Name CRONUS

E-Mail communication@mail.se

Phone Number 031-00000

Business Unit

GLN

VAT Registration No. SE999999999999999999991

Organizational Number 9999999999999999



Back Next Finish


- **Project Code:** The project code will be handed out by your reseller before registration. Mandatory field.
- **Company Name:** Specifies the company's name, default value is taken from company information. Mandatory field.
- **E-Mail:** Specifies the company's e-mail, default value is taken from company information. Mandatory field.
- **Phone Number:** Specifies the company's phone number, default value is taken from company information. Optional field.


- **Business Unit:** The business unit that the company belongs to. Optional field.
- **GLN:** Specifies the company's GLN, default value is taken from company information. Semi-mandatory field*.
- **VAT Registration No.:** Specifies the company's VAT registration number, default value is taken from company information. Semi-mandatory field*.
- **Organizational Number:** Specifies the company's organizational number, default value is taken from company information for SE localization. Semi-mandatory field*

*At least one of these fields must be filled.

- Step 2 (Company address information)

PAGERO ONLINE COMPANY SIGN UP  



Address	<input type="text" value="Ringvagen 5"/>
Address 2	<input type="text" value="box105"/>
City	<input type="text" value="Goteborg"/>
County	<input type="text"/>
Department	<input type="text"/>
Post Code	<input type="text" value="415 06"/>
Post Box	<input type="text"/>
Country/Region Code	<input type="text" value="SE"/> 

- **Address:** Specifies the company's address, default value is taken from company information. Optional Field.
- **Address 2:** Additional address field for the company, default value is taken from company information. Optional field.
- **City:** Specifies the city the company resides; default value is taken from company information. Optional field.

- **County:** Specifies the county the company resides; default value is taken from company information. Optional field.
- **Department:** Specifies the company's department.
- **Post Code:** Specifies the company's post code; default value is taken from company information. Optional field.
- **Post box:** Specifies the company's post box. Optional field.
- **Country/Region Code:** Specifies the company's country code, default value is taken from company information. Mandatory field.

- Step 3 (User Information)

PAGERO ONLINE COMPANY SIGN UP

⏏

⚙️

Username *

User Full Name *

User E-Mail *

Confirm User E-Mail *

Language English

User Phone Number *

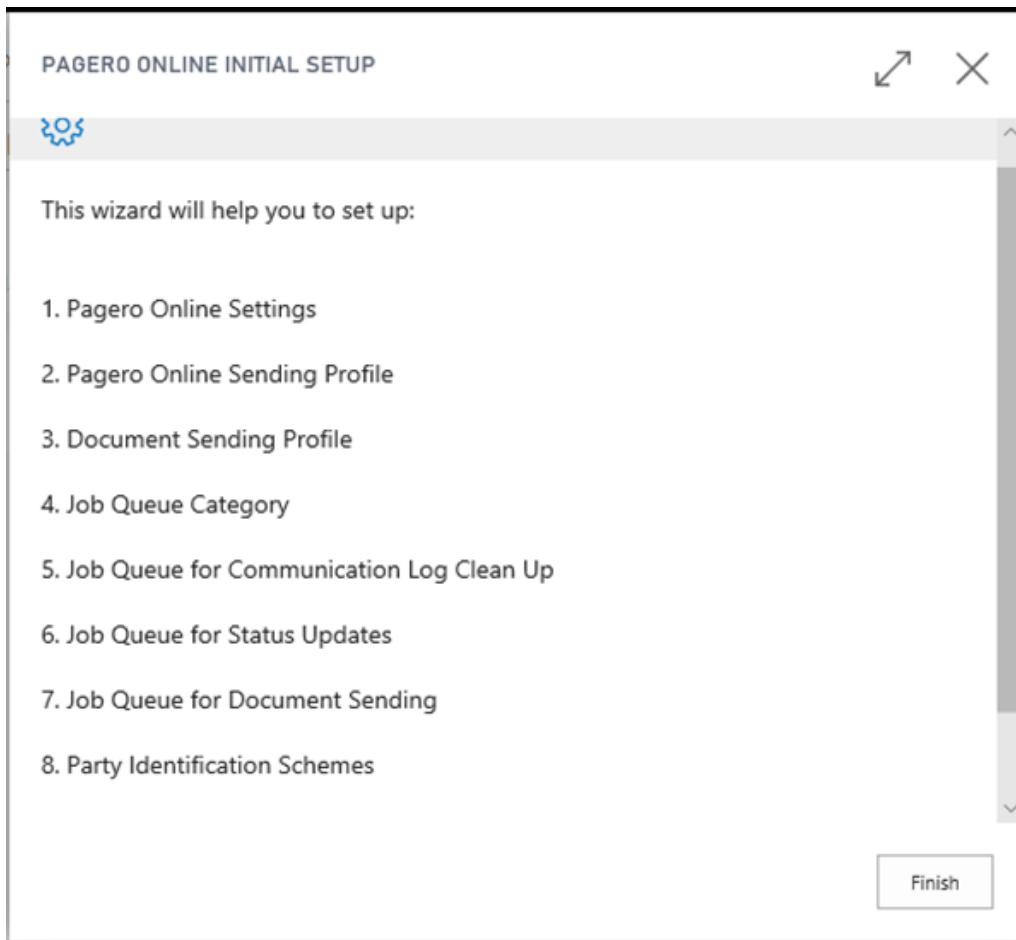
Back Next Finish

- **Username:** Specifies the administrator's username. Mandatory field.
- **User Full Name:** Specifies the administrator's full name. Mandatory field.
- **User E-Mail:** Specifies the administrator's e-mail. Mandatory field.
- **Confirmation E-mail:** Confirm the User E-mail.
- **Language:** Choose in which language you wish to receive the user activation e-mail.
- **User Phone Number:** Specifies the administrator's phone number. Mandatory field.

If the company is successfully registered, a message will be sent to the administrator's email address given in the wizard with instructions on how to complete the registration.

Initial Setup (2016 and 2017 only)

All Pagero Online related settings are set automatically by the initial setup, so you will only have to run it once. To begin with the Initial Setup, search for: **Pagero Online Initial Setup**



Dialog window when running the wizard for the first time.

Pagero Online credentials

To finalize the connection between the ERP and your Pagero Online account, you need to store your Pagero Online credentials and Time Zone in the ERP. You can enter or change your credentials in **Pagero Online Credentials**. Credentials can only be saved when they are valid, or the password field is empty.

The Status field indicates the condition of your Pagero Online Credentials:

- **Valid** – User have entered correct credentials for Pagero Online.
- **Invalid** – User have entered incorrect credentials for Pagero Online.
- **Not Verified** – User have entered an empty username or password and therefore the credentials could not be verified. This could also happen if there was a problem contacting



Pagero Online. Please verify that you can access www.pageroonline.com through a browser and login to the site if the latter happens.

The **Locked** checkmark indicates that the user account is locked in Business Central because the user has performed more than the allowed numbers of attempts to authenticate with Pagero Online. If you haven't performed more than 5 authentication attempts, the user account is automatically unlocked when you enter correct credentials for Pagero Online. After 5 failed authentication attempts, users account will also be locked in Pagero Online. You will need to contact Pagero SSC (Support and Service Center) to unlock your user account before you may try again.

EDIT - PAGERO ONLINE CREDENTIALS

Username: 365BCTest

Password:

Time Zone: W. Europe Standard Time

Status: Valid

Locked:

OK Cancel

2 Setting up Customers for Sending Documents Through Pagero Online

With Pagero, you can send invoices electronically, through email and print. To be able to do that, you need to assign the Pagero document sending profile to the customer (see pictures below), this is to indicate that each invoice created for customers having the Pagero sending profile should be sent through Pagero.

CUSTOMER CARD

10000 · Adatum Corporation

New Document Request Approval Customer Actions Navigate Report Less options

General

No.	10000	Responsibility Center
Name	Adatum Corporation	Document Sending Profile	PAGERO
IC Partner Code	Total Sales	79,163.50
Balance (LCY)	10,564.70	Costs (LCY)	40,457.10
Balance Due (LCY)	10,564.70	Profit (LCY)	20,517.80
Credit Limit (LCY)	0.00	Profit %	33.6
Blocked	Last Date Modified	3/18/2019
Privacy Blocked	<input type="checkbox"/>	Disable Search by Name	<input type="checkbox"/>
Salesperson Code	MS	Not in AEAT	<input type="checkbox"/>

Address & Contact

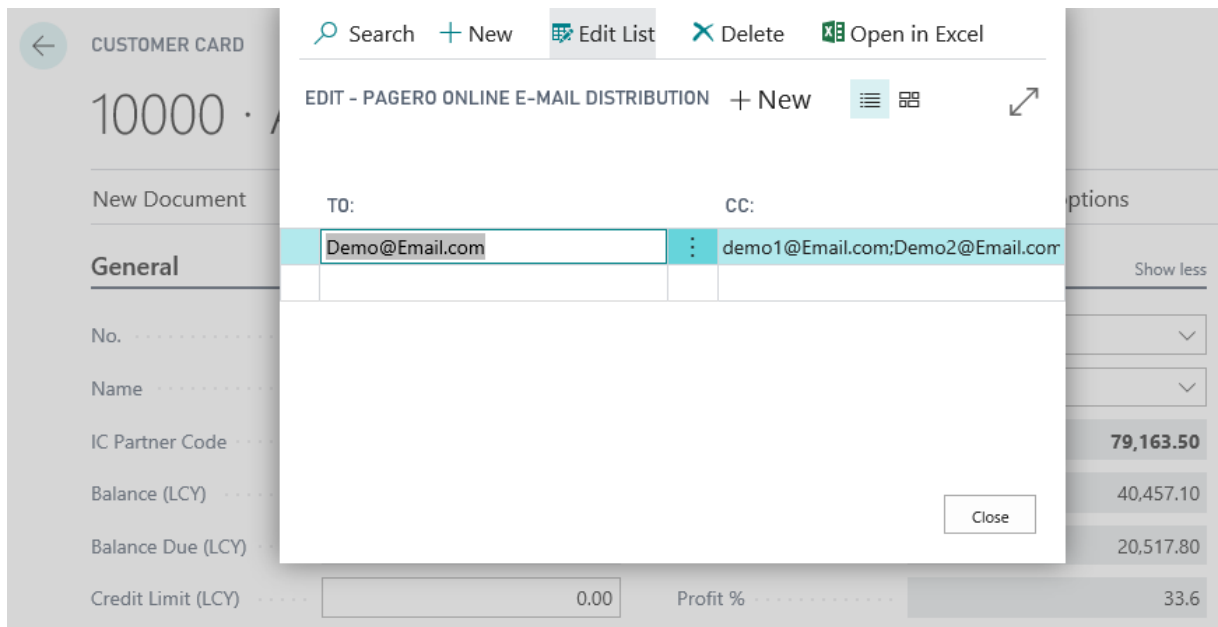
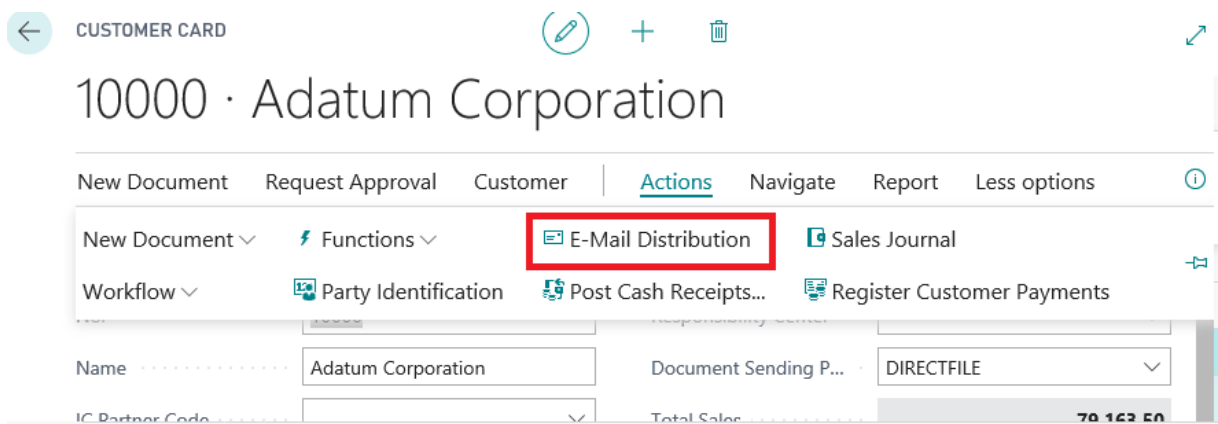
ADDRESS CONTACT

E-Invoices

You can either send invoices against Pagero's general customer directory or [maintain your own customer directory in Pagero Online](#). The latter is the default option. If you maintain your own customer directory, Pagero's interface will guide you through the necessary steps needed to establish a connection if such requirements exist. If you don't wish to maintain a customer directory, you can change it by navigating to **Settings -> Company settings -> Outbound -> Routing** and selecting "On".

E-mail

Add an e-mail on the customer card by navigating to **Action->E-Mail Distribution**. You can add one main e-mail and several Cc e-mails by separating them with one of the following symbols: [,], [;], [[]].



You can also add e-mails for a specific contact by navigating to **Contact card->Actions-> E-Mail Distribution**.

CONTACT CARD

CO000001 · Adatum Corporation

Process Report Page **Actions** Navigate Report Less options

Functions E-Mail Distribution Create Interaction Create Opportunity

Print

If the customer is not identified as an e-invoice receiver or e-mail receiver, the invoice will be sent as a printed invoice. If the invoice is being printed no additional actions are needed in Pagero Online.

3 Before sending documents

Check the International standard codes

The international standard codes for the unit of measures you are using needs to be added in the ERP. The international standard codes could be found in: <https://www.unece.org/tradewelcome/un-centre-for-trade-facilitation-and-e-business-uncefact/outputs/cefactrecommendationsrec-index/list-of-trade-facilitation-recommendations-n-16-to-20.html> . Below image is an example of the International standard codes added.

UNITS OF MEASURE


Search + New Edit List Delete Open in Excel Navigate Less options

CODE	DESCRIPTION	INTERNATIONAL STANDARD CODE
BT	Bote	CA
CAJA	Caja	BX
DÍA	DÍA	DAY
HORA	Hora	HUR
KG	kilo	KGM
KM	Kilómetro	KMT
MILES	Miles	1A
PALET	PALET	PF
PAQ.	PAQ.	PK
UDS	Unidad	EA

Add tax registration status if needed

In some countries, a tax registration status needs to be stated on the invoices. In Sweden for example, the text “Godkänd för F-Skatt” or similar might be needed to state in the invoices. To add the needed text, place it in Company information as shown in the image below.




Company Information

Report	Application Settings	System Settings	Currencies	Codes	Regional Settings	...
City	London	...	GLN			
County			Picture			
Post Code	W2 8HG	...				
Country/Region Code	GB					
Communication >						
Payments >						
Shipping >						
System Indicator						
System Indicator	Company		System Indicator Text	CRONUS International Ltd.		
System Indicator Style	Standard					
Additional Information (Pagero Online)						
Tax Registration Status			Bank Post Code			
Bank Address			Bank Country/Region...			
Bank Address 2			Bank County			
Bank City						





4 Sending documents

Once the Pagero Document Sending profile is assigned to a customer, all sales and service documents will be sent to Pagero Online for that customer. This means that the following functionality will be adjusted to send the documents to Pagero Online:

- 1) Send functionality for posted sales and service documents.
- 2) Post and Send functionality for not posted sales and service documents.

Invoice	Correct	Print/Send	Pagero Online	Show Attached	More options
 Send...	 Print...	 Email			

Sending from posted documents

Posting	Invoice	Release	Request Approval	Pagero Online	Actions	Navigate	Less options
 Post	 Post and New...	 Post and Send...	 Preview Posting				

Sending from not posted documents

Send (to Pagero Online) is supported from the following sales and service documents:

- Posted Sales Invoice
- Posted Sales Credit Memo
- Posted Service Invoice
- Posted Service Credit Memo

Post and Send (to Pagero Online) is supported from the following sales and service documents:

- Sales Invoice
- Sales Credit Memo
- Service Invoice
- Service Credit Memo
- Sales Order

Post and Send (to Pagero Online) is not supported from the following sales and service documents:

- Service Orders

If there is a need to re-send a posted document to Pagero Online, the Send functionality for posted sales and service documents could be used. A notification message will inform you that the document has already been sent before, so you can confirm that it really should be re-sent.

To make it easier for the user, it is possible to select multiple documents and send them to the Pagero Online at once. Select documents you want to send and click on “Send Selected Documents” button highlighted in the image below. This will only send documents that have the Pagero document sending profile pre-selected.

No.	Customer No.	Customer Name	Currency Code	Due Date	Remaining Amount	Location Code	No. Printed	Closed	Cancel...	Correc...	Sending Profile	Document Status	Send Mode
<input checked="" type="radio"/>	103151	The Cannon Group PLC		2/10/2022	0.000.00	BLUE	0	No			PAGERO	Not Sent	
<input type="radio"/>	103150	The Cannon Group PLC		2/10/2022	0.000.00	BLUE	2	No			PAGERO	Sent	Certification
<input type="radio"/>	103149	The Cannon Group PLC		2/10/2022	0.000.00	BLUE	1	No			PAGERO	Sent	Certification
<input checked="" type="radio"/>	103148	The Cannon Group PLC		2/10/2022	0.000.00	BLUE	0	No			PAGERO	Not Sent	
<input type="radio"/>	103147	The Cannon Group PLC		2/10/2022	0.000.00	BLUE	1	No			PAGERO	Sent	Certification
<input type="radio"/>	103146	The Cannon Group PLC		2/10/2022	0.000.00	BLUE	1	No			PAGERO	Sent	Certification
<input type="radio"/>	103145	The Cannon Group PLC		2/10/2022	0.000.00	BLUE	1	No			PAGERO	Sent	Certification

Batch sending

To send more than one document at the same time (only documents that have the Pagero document sending profile pre-selected), you can click on the “Batch send” button highlighted in the image below.

Sales ▾ Purchasing ▾ Inventory ▾ Posted Documents ▾ Self-Service ▾

Search Delete Invoice Correct Pagero Online Show Attached Open in Excel More options

CUSTOMER	CURRENCY CODE	DUE DATE	AMOUNT	LOCATION CODE	NO. PRINTED	CLOS...	COR...	DOCUMENT SENDING PROFILE	PAGERO ONLINE DOCUMENT STATUS
Seguros Bella Vista S.A.		2021-01-31	2 198,94		0	No			Not Sent
Seguros Bella Vista S.A.		2021-01-31	8 383,00		0	No			Not Sent
Sellafrío S.L.		2021-02-08	9 741,71		1	No		PAGERO	Not Sent
GDE Distribución S.A.		2021-02-25	11 204,58	AZUL	1	Yes		PAGERO	Not Sent
Servicio de aguas Deco		2021-02-04	1 104,93		0	No			Not Sent
Autohaus Mielberg KG		2021-01-30	1 441,60		0	No			Not Sent
GDE Distribución S.A.		2021-02-20	5 083,00	AZUL	1	Yes		PAGERO	Not Sent
Reno Diseño gráfico		2021-02-13	2 474,18	GRIS	0	No			Not Sent
Reno Diseño gráfico		2021-02-10	3 789,47	GRIS	0	Yes			Not Sent
Sellafrío S.L.		2021-01-31	267,72		310,56			PAGERO	Not Sent

Before any documents are sent, you will be given the following options:

- Batch send:
 - o **My posted document** – the document posted by you as a user
 - o **All Posted Documents** – All posted documents
- Status:
 - o **Error sending** – All documents that have this status could be sent at once.
 - o **Not Sent** - All documents that have this status will be sent at once.
 - o **Both** - All documents that have status “Error sending” and “Not Sent” will be sent at once.

Sales ▾ Purchasing ▾ Inventory ▾ Posted Documents ▾ Self-Service ▾

Search Delete Invoice Correct Pagero Online Show A

CUSTOMER	CURRENCY CODE	DUE DATE	AMOUNT	AMOUNT INCLUDING VAT	PAGERO ONLINE DOCUMENT STATUS
Seguros Bella Vista S.A.		2021-01-31	2 198,94	2 550,77	Not Sent
Seguros Bella Vista S.A.		2021-01-31	8 383,00	8 969,81	Not Sent
Sellafrío S.L.		2021-02-08	9 741,71	10 423,63	Not Sent
GDE Distribución S.A.		2021-02-25	11 204,58	11 988,90	Not Sent
Servicio de aguas Deco		2021-02-04	1 104,93	1 281,72	Not Sent
Autohaus Mielberg KG		2021-01-30	1 441,60	1 441,60	Not Sent
GDE Distribución S.A.		2021-02-20	5 083,00	5 896,28	Not Sent
Reno Diseño gráfico		2021-02-13	2 474,18	2 870,05	Not Sent
Reno Diseño gráfico		2021-02-10	3 789,47	4 395,79	Not Sent
Sellafrío S.L.		2021-01-31	267,72	310,56	Not Sent

EDIT - BATCH SEND

Batch Send: All Posted Documents

Status: Not Sent

OK Cancel

The documents will be sent in the same send mode that is selected in Pagero Online Settings.

Business Central | Posted Sales Invoices > Pagero Online Settings

CRONUS España S.A. | Sales ▾ Purchasing ▾ Inventory ▾ Posted Documents ▾ Self-Service ▾

Posted Sales Invoices: All ▾ Search Delete Invoice Correct

NO.	CUSTOMER NO.	CUSTOMER	CURRENCY CODE	DUE DATE
123	01454545	New Concepts Furniture	USD	2021-01-31
103049	10000	GDE Distribución S.A.		2021-02-28
103048	10000	GDE Distribución S.A.		2021-02-28
103047	01905902	London Candy Storage ...	CAD	2021-01-31
103046	01905899	Ekthom Airport	CAD	2021-02-11
103044	01905902	London Candy Storage ...	CAD	2021-01-31
103043	10000	GDE Distribución S.A.		2021-02-10
103042	10000	GDE Distribución S.A.		2021-02-28
103041	01905899	Ekthom Airport	CAD	2021-02-11
103040	10000	GDE Distribución S.A.		2021-02-28
103039	10000	GDE Distribución S.A.		2021-02-28

Pagero Online Settings

Pagero Online Show Attached More options

General

Product Version: PGNW110.00.53

REST API Base URL: https://www.pageroonline.com/...

Credentials Verification: https://auth.pageroonline.com/...

Send Mode: Certification

Business Party Identif...: %1%2*%3*%4

Pagero Auth Compan...:

Prompt To Change Ac...:

Failed Connections LI...: 1

Use current user's cre...:

Update customer/con...: Ask

Do not send Invoices ...:

Amount Threshold (le...: 0,00

Enable Sending of Re...:

Web Service Codes

Schedule the sending of documents to Pagero Online

With Pagero you can automate the sending of posted invoices. All posted invoices with the Pagero Online sending profile assigned could be sent automatically at a selected time. This is done through the **Job Queue for Document Sending**, see image below. The job queue will be disabled by default, to enable it search for **Pagero Online Job Queue Setup** and change it there. The documents will be sent in the same send mode selected in Pagero Online Settings.

JOB QUEUE FOR DOCUMENT SENDING

If you want NAV to automatically send documents to Pagero Online, we recommend creating a Job Queue for this purpose.

Use Job Queue

Start Time

Status of Documents Sent to Pagero Online

You can track the statuses of documents sent to Pagero Online in your ERP. The document status is shown in the Pagero Online Documents section. You can view the status of posted sales documents in the column Pagero Online Document Status:

← POSTED SALES INVOICES

✕ You have not entered Pagero Online credentials. [Pagero Online Credentials](#) | Do not show this notification again.

NO.	REMAINING AMOUNT	LOCATION CODE	NO. PRINTED	CLOS...	COR...	DOCUMENT SENDING PROFILE	PAGERO ONLINE DOCUMENT STATUS	SEND MODE
103035	0.00	AZUL	1	Yes		PAGERO	In Progress	Certification
103026	1,646.28		1	No		PAGERO	Awaiting U...	Certification
103002	10,423.63		1	No		PAGERO	Awaiting U...	Certification
103001	0.00	AZUL	1	Yes		PAGERO	In Progress	Certification
103031	0.00	AZUL	1	Yes		PAGERO	Processed	Certification
103020	310.56		1	No		PAGERO	Awaiting U...	Certification
103018	1,131.73		1	No		PAGERO	Awaiting U...	Certification
103014	0.00	AZUL	1	Yes		PAGERO	In Progress	Certification

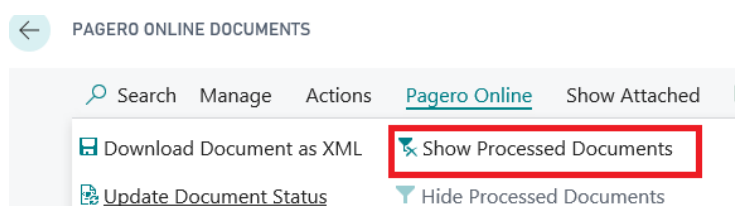
To view the status regardless of document type, search for **Pagero Online Documents**.

← PAGERO ONLINE DOCUMENTS

Search Manage Actions Pagero Online Show Attached Open in Excel

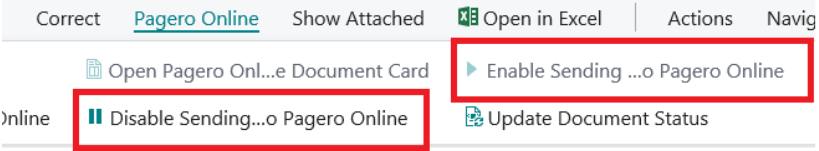
DOCUMENT NO.	DOCUME... TYPE	STATUS	CONTACT NO.	CONTACT NAME	DOCUMENT AMOUNT	DOCUME... DATE
103035	Invoice	In Progress	10000	GDE Distribución S.A.	4,000.00	1/28/2021
103001	Invoice	In Progress	10000	GDE Distribución S.A.	11,204.58	1/25/2021
103014	Invoice	In Progress	10000	GDE Distribución S.A.	10,040.92	1/7/2021
103026	Invoice	Awaiting U...	20000	Sellafrio S.L.	1,419.21	1/18/2021
103002	Invoice	Awaiting U...	20000	Sellafrio S.L.	9,741.71	1/25/2021
103020	Invoice	Awaiting U...	20000	Sellafrio S.L.	267.72	1/17/2021
103018	Invoice	Awaiting U...	20000	Sellafrio S.L.	975.63	1/13/2021

Processed documents are hidden by default. Click **Show Processed Documents** to see the processed documents.



The possible statuses are described in the following table:

Microsoft Dynamics 365 Business Central Status	Description
Not Sent	The document has not been sent to Pagero Online. Visible only in posted sales documents view.
Sent	The document has been sent to Pagero Online and is waiting to be processed.
N/A	Sent document not found in files sent to Pagero Online and needs to be resent.
In Progress	The document is being processed by Pagero Online or needs handling by Pagero's Support and Service Center (SSC). If the file is being handled by Pagero's SSC the user will be notified if they need to take any action, otherwise it's handled entirely by Pagero's SSC.
Awaiting user action	The document has been stopped in Pagero Online for one of the following reasons: <ul style="list-style-type: none"> The document contains invalid or insufficient data and was therefore stopped. Go to My Documents/Handle files with errors in Pagero Online to handle the error. The document is waiting for approval or third-party interaction, before it can be sent to the receiving party. Sending user will receive an e-mail notification about actions needed in this scenario.

Microsoft Dynamics 365 Business Central Status	Description
Processed	File has been processed in Pagero Online and a document was created from it.
Sending disabled	<p>You can disable a document from being sent to Pagero Online. This is useful if you have the job queue for sending documents enabled and don't want a specific invoice to be sent automatically. The button is accessible in Posted Sales Invoice, Posted Sales Credit Memo, Posted Service Invoice and Posted Service Credit Memo. You can select multiple documents if you want to disable or enable sending for more than one document.</p> 
Error sending	An unexpected communication error occurred when the job queue for sending documents tried to send the invoices. Invoices with status "Error sending" must be resent manually to Pagero Online. Visible only in posted documents view. All invoices with this error can be resent at once through the Batch send functionality described earlier in this guide.

To be able to check if an ERP user is connected to Pagero Online, you can check the colour of the ERP Username column in **Pagero Online documents** view.

- Black – Connection between Business Central User and Pagero Online is established.
- Yellow –The Business Central user have incorrect or no Pagero Online user credentials entered.
- Red – The Business Central user does not exist anymore.

NO.	DOCUMENT NO.	DOCUME... TYPE	STATUS	CONTACT NO.	CONTACT NAME	DOCUMENT AMOUNT	DOCUME... DATE	DUE DATE	NAV USERNAME	TIME FROM LAST STATUS CHANGE
8	103018	Invoice	Awaiting Us...	20000	Sellafrio S.L.	975.63	1/13/2021	1/27/2021	DYNAMICST...	23 hours 37 mi...
9	103036	Invoice	Sent	10000	GDE Distribución S.A.	4,000.00	1/28/2021	2/28/2021	DYNAMICST...	1 minute

5 General functions

This section will describe the general functions available with Pagero solution.

Pagero Online Settings

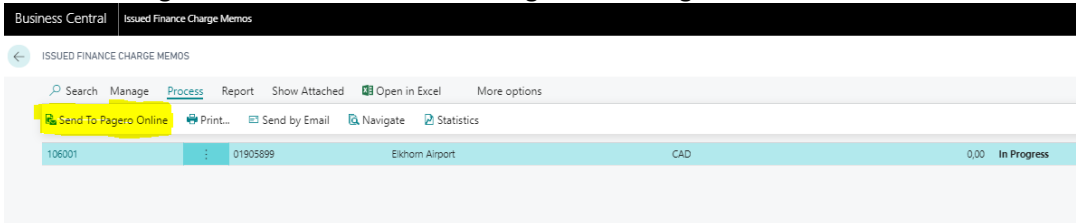
Pagero Online Settings table contains the settings related to Pagero Online functionality.

You can access these settings here: **Departments/Pagero Online/Pagero Online Setup**

These settings will be automatically prepopulated during the initial setup. They can be restored to their default values by clicking the action button **Restore Default Settings** in **Pagero Online Settings** page. Be careful when changing these settings since they affect all users of the Pagero Online

solution, users may be unable to send documents to Pagero Online or retrieve updates from documents already sent.

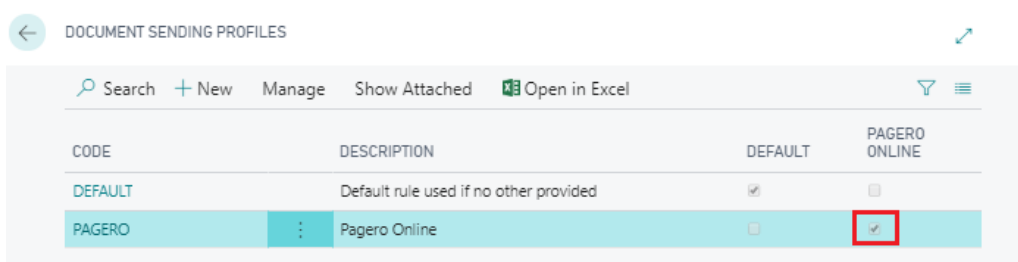
Field	Description
General	
Product version	Identifies the version of the Pagero Online solution.
REST API Base URL	Base URL for connecting to the Pagero Online API. Read-only. Populated automatically during initial setup.
Credentials Verification URL	URL of Pagero API for verifying user credentials. Read-only. Populated automatically during initial setup.
Send Mode	<p>Specifies default mode for documents processing in Pagero Online:</p> <ul style="list-style-type: none"> • Certification - Document is processed but not delivered to the recipient. • Test - Document is processed and delivered to the recipient in test mode (could be a separate test environment or something similar the recipient has set up). • Production - Document is processed and delivered to the recipient in production mode. <p>User can select different send mode in popup dialog, when document sending is initiated.</p>
Business Party Identifier Formula	Formula to identify document sending party in Pagero Online.
Pagero Auth Company ID	Technical Company ID field. Used to identify document sending company. Automatically set when having finished the Pagero Online Company Sign Up Wizard. Can be empty, if users sending documents to Pagero Online has only one Company associated to their company in Pagero Online.
Prompt to Change Account Info	User is prompted to update their Pagero Online credentials if they fail authentication when interacting with Pagero Online.
Failed Connections Limit	Specifies the number of failed connections before user account is locked. After an account is locked no further interactions with Pagero Online is possible until account is unlocked again. This is to protect the user from being locked out from Pagero Online.
Use current user's credentials for Send Batch	When this option is checked, the posted invoices will be sent using Pagero Online credentials belonging to the sending user, regardless of who posted the invoices. If not checked, the Pagero Online credentials of the ERP user(s) that posted the invoice(s) will be used.
Update customer/contact information in sales and service documents	<p>Used in French/Spanish localization only. This setting gives you 3 options:</p> <ul style="list-style-type: none"> - Ask: When changing the DIR3 codes (Spain) / Service Code (France) on the customer card or contact card, you will be asked if the updated value(s) should be updated in the existing sales orders and in the already posted sales documents. - Automatically: When changing the DIR3 codes (Spain) / Service Code (France) on the customer card or contact card, the new value(s) will automatically be updated in the existing sales orders and in already posted sales documents. - Manually: When changing the DIR3 codes (Spain) / Service Code (France) on the customer card or contact card, the new value(s) will not be updated in the existing sales orders and in already posted sales documents. However, for existing sales orders, you will be able to manually change the values before posting.

Field	Description
Do not send Invoices below certain amounts:	Sometimes it is not needed to send invoices under certain amount to Pagero Online (In most cases zero-amount invoices). This functionality allows you to skip these invoices from being automatically sent (Batch send and Job Queue) to Pagero Online. To enable this functionality, you have to enable 'Do not send Invoices below certain amounts' in Pagero Online Settings. These invoices will be skipped from being sent by the job queue and the batch send button. You will have the option of sending the effected invoices manually one by one if needed.
Amount Threshold (less than or equal to):	Linked to "Do not send Invoices below certain amounts", here you should enter the invoice amount which invoices having less than or equal to that amount will not be sent to Pagero online. Amount is in currency set on General Ledger Setup. When document uses different currency, amount is converted to default currency and compared with Amount Threshold value. If posted Pagero document has lower or equal amount, status of the document will be set to "Sending Disabled".
Enable Sending of Reminders/Finance Charge Memos:	Pagero Online extension (2018/D365BC) also provides possibility to send reminders and finance charge memos to Pagero Online. This is an additional service, please contact your account representative before activating and sending, otherwise all documents will fail validation in Pagero Online. To use this functionality, you have to enable it in Pagero Online Settings by checking 'Enable Sending of Reminders/Finance Charge Memos'. After you have enabled this functionality, you can navigate to Issued Reminder/Issued Finance Charge Memo card and send it using 'Send to Pagero Online' button: 
Web Services Codes	
Signup	Web Service Identifier in Pagero Online Communication Log for web service calls related to signing up to Pagero Online. Read-only. Populated automatically during initial setup.
Upload File	Web Service Identifier in Pagero Online Communication Log for web service calls related to sending documents to Pagero Online. Read-only. Populated automatically during initial setup.
Check Status	Web Service Identifier in Pagero Online Communication log for web service calls related to checking document status in Pagero Online. Read-only. Populated automatically during initial setup.
Document Types	
Invoice	Document type identifier for Invoices in Pagero Online REST API. Read-only. Populated automatically during initial setup.
Credit Memo	Document type identifier for Credit Memos in Pagero Online REST API. Read-only. Populated automatically during initial setup.
Service Invoice	Document type identifier for Service Invoices in Pagero Online REST API. Read-only. Populated automatically during initial setup.
Service Credit Memo	Document type identifier for Service Credit Memos in Pagero Online REST API. Read-only. Populated automatically during initial setup.

Field	Description
Reminder	Document type identifier for Reminders in Pagero Online REST API. Read-only. Populated automatically during initial setup.
Finance Charge Memo	Document type identifier for Finance Charge Memos in Pagero Online REST API. Read-only. Populated automatically during initial setup.

Document sending profile

You need a sending profile that is Pagero Online enabled to send documents to Pagero Online. The document profile is inherited from the document sending profile and assigned to the Customer card. In the document sending profile, the "Pagero Online" checkbox must be checked and the Pagero Online Profile assigned to it.



Note: For customers having the Pagero Online Document Sending Profile assigned, the standard Microsoft Dynamics **Document Sending Profile** functionality is not available, i.e. all options in the **Sending Options** Fast-Tab can't be changed as that kind of set up would be incorrect.

Pagero Online Sending Profile specifies Codeunits that executes business logic for documents sent through a **Document Sending Profile** marked as Pagero Online Profile. This way you may improve the flexibility (usually with the help of our reseller) for the business logic that runs when sending and validating documents.

The list of settings related to the Pagero Online Sending Profile are described in the table below.

Field	Description
General	
Code	Unique identifier for settings.
Description	Self-explanatory.
Sales Invoice	
Sending Codeunit	Codeunit that handles invoice export to Pagero Online format and sending documents to Pagero Online.
Validation Codeunit	Codeunit that performs additional checking, before document is posted, for customers with Pagero Document Sending profile.
Sales Credit Memo	
Sending Codeunit	Codeunit that handles invoice export to Pagero Online format and sending documents to Pagero Online.
Validation Codeunit	Codeunit that performs additional checking, before document is posted, for customers with Pagero Document Sending profile.
Service Invoice	

Field	Description
Sending Codeunit	Codeunit that handles invoice export to Pagero Online format and sending documents to Pagero Online.
Validation Codeunit	Codeunit that performs additional checking, before document is posted, for customers with Pagero Document Sending profile.
Service Credit Memo	
Sending Codeunit	Codeunit that handles invoice export to Pagero Online format and sending documents to Pagero Online.
Validation Codeunit	Codeunit that performs additional checking, before document is posted, for customers with Pagero Document Sending profile.

Job Queues and Tasks

The solution has a couple of periodic tasks that could be automated with the help of NAS (NAV Application Server). Job Queue Entries are configured during initial setup.

All settings related to job queues can be changed in **Departments/Pagero Online/Pagero Online Job Queue Setup**.

Edit - Pagero Online Job Queues Setup



Job Queue for Status Updates

If you want NAV to automatically update status of documents sent to Pagero Online, we recommend creating a Job Queue for this purpose.

Use Job Queue

No of Minutes Between Attempts

Job Queue for Communication Log Clean Up

To make it easier to navigate the log entries in Pagero Online Communication Log, we recommend creating a Job Queue for this purpose.

Use Job Queue

Run On

Start Time

No of Days to Keep

Web Service Code Filter

Job Queue for Pagero Documents Clean Up

To make it easier to navigate the Pagero Online Documents list, we recommend creating a Job Queue for this purpose.

Use Job Queue

Run On Sunday ▾

Start Time 10:00:00 PM

No of Days to Keep 90

Job Queue for Document Sending

If you want NAV to automatically send documents to Pagero Online, we recommend creating a Job Queue for this purpose.

Use Job Queue

Start Time 10:00:00 PM

Job Queue settings (2016 only)

Parameters to create separate Job Queue for handling Pagero related Job Queues. Applicable to 2016 only as Job Queues are replaced by Task Scheduler functionality in 2017.

Periodic status checking of sent documents

Creates a periodic task for checking the status of documents sent to Pagero Online. The **No of Minutes Between Attempts** specifies checking interval. Job Queue runs Codeunit 12070780 that checks the status of all documents that has not been processed yet.

Periodic clean-up of Pagero Online Communication Log

Pagero Online Communication Log gets cluttered over time. It is possible to set up a periodic job that cleans up old entries in the Pagero Online Communication Log. Specify the **No of Days to Keep** to set how many days of logging you wish to keep.

Job Queue runs Codeunit 12070781 that deletes expired communication log entries. Log expiration period in days is specified in **Parameter String** field as number. Filter can also be added to deleted specific log entries.

General

Object Type to Run	Codeunit	Parameter String	14:PAGERO_CHECK_CONNECT PAGERO_STATUS_CHECK
Object ID to Run	12070781	Job Queue Category Code	PAGERO
Object Caption to Run	PGN Log Clean Up	User ID	SYSTEM
Description	Pagero Log Clean Up	Maximum No. of Attempts to Run	3

Periodic clean-up of Pagero Online Documents

Every document sent to Pagero Online is stored in Pagero Documents table. To keep database size smaller, periodic job can be setup to clean up old entries in Pagero Documents table. Specify the **No of Days to Keep** to set how many days you wish to keep sent documents in your database.


Job Queue runs Codeunit 12070778 that deletes old Pagero Documents. Number of days to keep documents is specified in Parameter String field as number. This Job Queue is disabled by default.

Job queue for document sending

The job queue for document sending enables the user to schedule a time to automatically send posted documents (Sales Invoice, Sales Credit Memo, Service Invoice, Service Credit Memo) to Pagero Online. Documents are sent with Pagero Online credentials used by the ERP user that posted the document. Invoices to customers with the Pagero Online sending profile will automatically be sent at the predefined time set by the user. The Job queue will be created but disabled by default when running the initial setup. The user can choose to enable the Job queue for document sending in Pagero Online Job Queue Setup.

Restoring default settings

In **Departments/Pagero Online/Pagero Online Restore Dialog** you may restore the default settings that are related to the product. You can do all or partial restore of default settings.

EDIT - PAGERO ONLINE RESTORE DIALOGUE 

Restore All Settings

Restore Pagero Online Sett...

Restore Pagero Online Sen...

Restore Document Sending...

Restore Party Identification...

Restore Job Queue Category

Restore Job Queue Entries

Role Centers

Pagero Online Role Center Home Page (ID 12070769) consists of 2 dashboards:

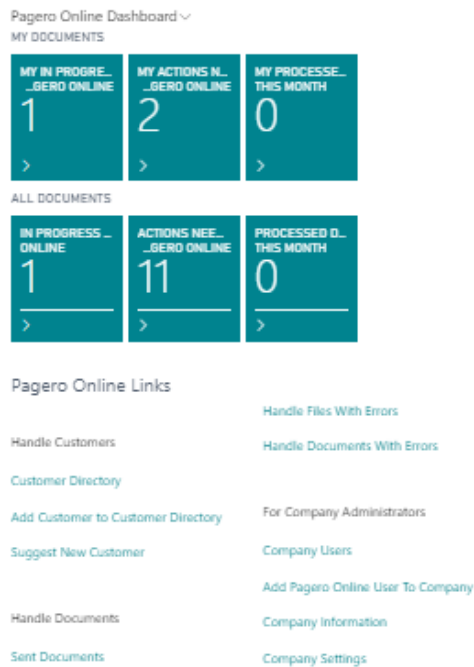


- **Pagero Online Dashboard** with access to important document statuses represented as tiles.
- **Pagero Online Links** which contains links to useful activities performed in Pagero Online.

Pagero Online Dashboard and Pagero Online Links have been added to the standard role centers. These parts enable users to have an overview of documents sent to Pagero Online and access links to common tasks in Pagero Online. Here is the list of modified role center pages:

Object ID	Object Name	Applicable To
9000	Whse. WMS Role Center	2016, 2017, 2018, Business Central
9001	Accounting Manager Role Center	2016, 2017, 2018, Business Central
9003	Acc. Receivables Adm. RC	2016, 2017, 2018, Business Central
9004	Bookkeeper Role Center	2016, 2017, 2018, Business Central
9005	Sales Manager Role Center	2016, 2017, 2018, Business Central
9006	Order Processor Role Center	2016, 2017, 2018, Business Central
9008	Whse. Basic Role Center	2016, 2017, 2018, Business Central
9010	Production Planner Role Center	2016, 2017, 2018, Business Central
9011	Shop Supervisor Mfg Foundation	2016, 2017, 2018, Business Central
9012	Shop Supervisor Role Center	2016, 2017, 2018, Business Central
9015	Job Project Manager RC	2016, 2017, 2018, Business Central
9016	Service Dispatcher Role Center	2016, 2017, 2018, Business Central
9019	CEO and President Role Center	2016, 2017, 2018, Business Central
9020	Small Business Owner RC	2016, 2017, 2018, Business Central
9022	Small Business Role Center	2016, 2017, 2018, Business Central
9023	Accounting Services RC	2016, 2017, 2018, Business Central
9026	Sales & Relationship Mgr. RC	2017, 2018, Business Central
9027	Accountant Role Center	2017, 2018, Business Central

Here is an example of how these parts look like in the Accounting Manager Role Center.



Managing User

Change user credentials

Pagero user credentials are mapped to the ERP user and stored in the table Pagero Online User Setup – **Departments/Pagero Online/Pagero Online User Setup**

The following functionality is available through the Pagero Online User Setup:

- Update your user credentials.
 - o Enter Pagero Credentials in the fields **Pagero Online Username** and **Pagero Online Password**.
 - o You can check if credentials are valid by clicking **Check Connection** Action.
- Unlock your user
 - o When user credentials changes in Pagero Online, the ERP automatically locks the user to prevent locking user in Pagero Online due to multiple failed authentication attempts. In order to unlock user, enter the correct user credentials. The locked checkmark will automatically be removed, after entering correct Pagero Online credentials.
- Enable and disable notifications from showing (2017 and onwards).

PAGERO ONLINE USER SETUP CARD

DYNAMICSTOCLOUD\SPU2007047294

Encryption | Pagero Online | Show Attached | More options

General

NAV Username: DYNAMICSTOCLOUD\SPU2007... Time Zone: W. Europe Standard Time

Pagero Online Username: demo@pagero.com Locked:

Pagero Online Password: [REDACTED] Use This User for Job:

Notifications

Do not show credentials: Do not show Initial session:

Do not show sending: Do not show documents:

Troubleshooting

View electronic document in raw format.

You can view the raw format of the exported electronic document from Pagero Online Documents page – **Departments/Pagero Online/Pagero Online Documents**.

Click action Download Document as XML.

PAGERO ONLINE DOCUMENTS

Search | Manage | Actions | Pagero Online | Show Attached | Open in Excel

Download Document | Update Application Response Status | Hide Processed Documents

Update Document Status | Show Processed Documents

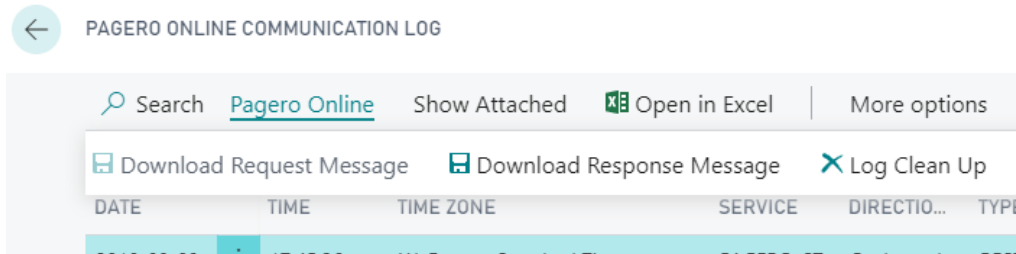
103051	Invoice	Awaiting U...	10000	GDE Distribución S.A.	4 000,00	2021-01-28
103051	Invoice	Awaiting U...	10000	GDE Distribución S.A.	4 000,00	2021-01-28
104001	Credit Memo	Awaiting U...	10000	GDE Distribución S.A.	355,64	2021-01-17
104001	Credit Memo	Awaiting U...	10000	GDE Distribución S.A.	355,64	2021-01-17
SOI0000001	Service Inv...	Awaiting U...	10000	GDE Distribución S.A.	4 000,00	2021-01-28
SOI0000001	Service Inv...	Awaiting U...	10000	GDE Distribución S.A.	4 000,00	2021-01-28
SCSP00001	Service Cre...	Awaiting U...	10000	GDE Distribución S.A.	4 000,00	2021-01-28
SCSP00001	Service Cre...	Awaiting U...	10000	GDE Distribución S.A.	4 000,00	2021-01-28
103051	Invoice	Awaiting U...	10000	GDE Distribución S.A.	4 000,00	2021-01-28
104002	Credit Memo	Awaiting U...	20000	Sellafrío S.L.	975,63	2021-01-19
104003	Credit Memo	Awaiting U...	20000	Sellafrío S.L.	1 419,21	2021-01-22
106001	Finance Ch...	In Progress			0,00	2021-01-28

Pagero Online Communication Log

Pagero Online Communication Log captures all calls made to the Pagero Online API. You can access Pagero Online Communication Log from menu **Departments/Pagero Online/Pagero Online Communication Log**.

It is possible to download the request and response messages from the action menu.

For certain queries, all information is located in the REST query string with an empty message body. In these cases the **Download Request Message** action will be unavailable.



Communication log is read-only, but you can clean up the communication log by clicking the action **Log Clean Up**. Specify the number of days with log entries that you wish to keep.

Pagero Online Communication Log Clean Up ↶ ✕

Delete communication log entries older than:

No. of Days

Web Service Code Filter

Description of Communication Log Fields

Field	Description
Date	Contains the date the web service call was made.
Time	Contains the time the web service call was made.
Web Service	Contains the type of web service that was called. You can view the names of the web services in the Pagero Online Settings Page.
Direction	Outbound – Outgoing Web Service Calls. Inbound – Incoming Web Service Calls.
Type	Identifies the type of Web Service, REST or SOAP.
Username	The username that triggered the message to be logged.
Request Message	Indicates whether a request message exists.
Response Message	Indicates whether a response message exists.
Status Code	Contains status code returned by server.
Result Message	Contains result message returned by server.
Response Message Format	Specifies, in what format message was returned XML,JSON,HTML or TXT.
Base URL	Contains the base URL used in the web service call.
Endpoint	Contains the endpoint used in the web service call.
Query String	Contains the query string used in the web service call. This is appended to the base URL and the endpoint to form the resulting query sent in the web service call.

Attachments

PDF presentation

Per default, the PDF presentation will be embedded in the XML and sent to the customer if the customer has support for receiving it. The Pagero Online sending profile created during the initial setup will automatically support exporting PDF presentation. You can unselect it or create a new sending profile without support for exporting PDF presentation.

The screenshot shows the configuration page for a 'PAGERO ONLINE SENDING PROFILE C...'. At the top, there are navigation icons: a back arrow, a pencil (edit), a plus sign, a trash can, and a share icon. Below this is the title 'PAGERO'. A 'Show Attached' button is visible. The 'General' section contains two rows of fields: 'Code' with a text input containing 'PAGERO' and a 'Default' toggle switch that is turned on; 'Description' with a text input containing 'PAGERO' and an 'Export PDF Presentati...' toggle switch that is also turned on. At the bottom, there is a 'Sales Invoice >' link.

Additional Attachments

You can send additional documents attached to your sales documents (Sales Invoice, Sales Credit Memo).

Attachments are stored in the **Pagero Online Attachments** table available for all Sales Documents. When attachments are linked to not posted document, they are automatically transferred to posted document and you can use **Post and Send** functionality for such documents.

To add an attachment to your document, click the **View Pagero Online Attachments** action.

The screenshot shows a 'SALES INVOICE' document for '1017 · GDE Distribución S.A.'. At the top right, there are edit, add, and delete icons. Below the title is a navigation bar with tabs: 'Process', 'Posting', 'Invoice', 'Release', 'Request Approval', 'Show Attached', 'Actions', 'Navigate', and 'Less options'. The 'Posting' tab is active, and a dropdown menu is open showing 'Pagero Online' with a sub-option 'View Pagero Online Attachments'. Below the navigation bar, the 'Customer Name' field is partially visible with the value 'GD...', and the 'Due Date' field shows '2021-02-28'.

Click **Add Attachment**

[Search](#)
[Edit List](#)
[Delete](#)
[Pagero Online](#)
[Show Attached](#)
[Open in Excel](#)
[Actions](#)
[Less options](#)

[Add Attachment](#)
[Open Attachment](#)

ATTACHMENT NO.	DESCRIPTION	FILE NAME	MIME TYPE
----------------	-------------	-----------	-----------

(There is nothing to show in this view)

Select the document you want to attach.

Supported attachment file types: **PDF, TXT, GIF, TIFF, JPEG, JPG, PNG, CSV, XLS, XLSX.**

Configure more than one account for payment

This functionality is useful if you needed to use different bank account information for specific customer(s) than stated in company information. To configure, you need to search for Pagero Online Payment group.

The Pagero Online Payment Group contains three fields:

CODE	PAY-TO BANK ACCOUNT	ADDITIONAL DESCRIPTION
PAYMENT CODE 1	NBE	Free text information
PAYMENT CODE 2	GIRO	Free text info 2

- **Code** – Allow you to create a code for a specific bank account to be selected on the customer card (see image below). If a code is selected on the customer card, the bank info linked to the code will be included in the XML file instead of the bank info in the company information.

CUSTOMER CARD

01121212 · Spotsmeyer's Furnishings

New Document Request Approval Customer Show Attached Actions Navigate Report Less options

General

No.	01121212	Credit Limit (LCY)	0,00	Not in AEAT	<input type="checkbox"/>
Name	Spotsmeyer's Furnishings	Blocked		Payment Group	PAYMENT CODE 1
Balance (LCY)	0,00	Total Sales	0,00		
Balance Due (LCY)	0,00	Costs (LCY)	0,00		

- **Pay-To Bank Account** – You will be able to select bank account information from the bank account card.
- **Additional Description** – Free text information which are transferred can be included depending on what code/bank account is used. This can be useful if you need to provide different information for different customers, either different text or in different languages.

The information will be transferred to document header when customer is selected and can be changed before posting if it is needed.

SALES INVOICE

1024 · Spotsmeyer's Furnishings

Process Posting Invoice Release Request Approval Show Attached Actions Navigate Less options

Contract Date Customer Contract Date

Additional Information (Pagero Online)

Customer Accounting Reference File Reference

Invoice Period File Reference Date

Additional Description Free text information Pay-To Bank Account NBE

Ship-To GLN 1234567890128

When 'Pay-To Bank Account' field is filled, payment information is exported from this bank account card to xml document.

Configure Invoices with certain amount or less not to be sent to Pagero Online

Sometimes it is not needed to send invoices under certain amount to Pagero Online (In most cases zero-amount invoices). This functionality allows you to skip these invoices from being automatically sent (Batch send and Job Queue) to Pagero Online. To enable this functionality, you have to enable 'Do not send Invoices below certain amounts' in Pagero Online Settings. These invoices will be skipped from being sent by the job queue and the batch send button. You will have the option of sending the effected invoices manually one by one if needed. Here is how to configure this function

1. Check the checkbox to enable the functionality

Pagero Online Settings

Pagero Online Show Attached Actions Less options

General

Product Version PGNW110.00.57

REST API Base URL https://www.pageroonline.com/...

Credentials Verificatio... https://auth.pageroonline.com/...

Send Mode Certification

Business Party Identifi... %1:%2#%3#%4

Pagero Auth Compan...

Prompt To Change Ac...

Failed Connections Li... 1

Use current user's cre...

Update customer/con... Ask

Do not send Invoices

Amount Threshold (le... 0.00

Enable Sending of Re...

Use E-mail on Custom...

Web Service Codes

Signup PAGERO_SIGN_UP

Upload File PAGERO_UPLOAD_FILE

Check Status PAGERO_STATUS_CHECK

Check Connection PAGERO_CHECK_CONNECT

2. Enter the amount, under which invoices should not be sent to Pagero online:

Pagero Online Settings

Pagero Online | Show Attached | Actions | Less options

General

Product Version	PGNW110.00.57	Failed Connections Li...	1
REST API Base URL	https://www.pageronline.com/...	Use current user's cre...	<input checked="" type="checkbox"/>
Credentials Verificatio...	https://auth.pageronline.com/...	Update customer/con...	Ask
Send Mode	Certification	Do not send Invoices ...	<input checked="" type="checkbox"/>
Business Party Identifi...	%1:%2#%3#%4	Amount Threshold (le...	0.00
Pagero Auth Compan...		Enable Sending of Re...	<input checked="" type="checkbox"/>
Prompt To Change Ac...	<input checked="" type="checkbox"/>	Use E-mail on Custom...	<input type="checkbox"/>

Web Service Codes

Signup	PAGERO_SIGN_UP	Check Status	PAGERO_STATUS_CHECK
Upload File	PAGERO_UPLOAD_FILE	Check Connection	PAGERO_CHECK_CONNECT

Sending Reminders and Finance Charge Memos (2018 and onwards)

Pagero Online extension also provides possibility to send reminders and finance charge memos to Pagero Online. This is an additional service, please contact Pagero Online support before activating and sending, otherwise all documents will fail validation in Pagero Online.

To use this functionality, you have to enable it in Pagero Online Settings by checking 'Enable Sending of Reminders/Finance Charge Memos':

Pagero Online Settings

Pagero Online | Show Attached | Actions | Less options

General

Product Version	PGNW110.00.57	Failed Connections Li...	1
REST API Base URL	https://www.pageronline.com/...	Use current user's cre...	<input checked="" type="checkbox"/>
Credentials Verificatio...	https://auth.pageronline.com/...	Update customer/con...	Ask
Send Mode	Certification	Do not send Invoices ...	<input checked="" type="checkbox"/>
Business Party Identifi...	%1:%2#%3#%4	Amount Threshold (le...	0.00
Pagero Auth Compan...		Enable Sending of Re...	<input checked="" type="checkbox"/>
Prompt To Change Ac...	<input checked="" type="checkbox"/>	Use E-mail on Custom...	<input type="checkbox"/>

Web Service Codes

Signup	PAGERO_SIGN_UP	Check Status	PAGERO_STATUS_CHECK
Upload File	PAGERO_UPLOAD_FILE	Check Connection	PAGERO_CHECK_CONNECT

After you have enabled functionality, you can go to Issued Reminder/Issued Finance Charge Memo card and send it using 'Send to Pagero Online' action:

The screenshot shows the 'ISSUED FINANCE CHARGE MEMOS' card in Business Central. The 'Send to Pagero Online' action is highlighted in yellow. Below the card, a table shows a record with ID 106001, reference 01905899, location Eikhorn Airport, currency CAD, and amount 0.00, with a status of 'In Progress'.

E-mail distribution sync (2018 and onwards)

This feature enables you to use the e-mail address from the customer card for distribution of invoices by e-mail. If the e-mail address in the customer card is the correct one for distribution of the invoice, you can use this function to enable that.

To update E-mail distribution for specific customers when needed, you can use 'Update E-mail Distribution for Customers' action in Pagero Online Settings:

The screenshot shows the 'Pagero Online Settings' page. At the top, there are tabs for 'Pagero Online', 'Show Attached', 'Actions', and 'Less options'. Below the tabs, there are three main actions: 'Check Connection', 'Restore Default Settings', and 'Update E-mail D...n for Customers'. The 'Update E-mail D...n for Customers' action is highlighted with a red rectangular box. Below the actions, there are several configuration fields:

Product Version	PGNW110.00.57	Failed Connections Li...	1
REST API Base URL	https://www.pageronline.com/...	Use current user's cre...	<input checked="" type="checkbox"/>
Credentials Verificatio...	https://auth.pageronline.com/...	Update customer/con...	Ask
Send Mode	Certification	Do not send Invoices ...	<input checked="" type="checkbox"/>
Business Party Identifi...	%1:%2#%3#%4	Amount Threshold (le...	0,00

This action will open a report where you can filter customers in update email distribution:

The screenshot shows the 'EDIT - UPDATE E-MAIL DISTRIBUTION FOR CUSTOMERS' report interface. At the top, there is a title bar with the text 'EDIT - UPDATE E-MAIL DISTRIBUTION FOR CUSTOMERS' and a refresh icon. Below the title bar, there is a description: 'For selected customers, e-mail distribution will be updated with customer's e-mail.' Below the description, there is a section titled 'Customer' with the text 'Show results:'. Underneath, there are two dropdown menus: 'Where:' with the value 'No.' and 'is:' with an empty dropdown. At the bottom, there are three buttons: 'Schedule...', 'OK', and 'Cancel'.

If you also want to update E-Mail Distribution every time when you enter E-mail in customer card, then you should use 'Use E-mail on Customer Card for E-mail Distribution' setting in Pagero Online Settings:

Pagero Online Settings

Pagero Online | Show Attached | Actions | Less options

General

Product Version	PGNW110.00.57	Failed Connections Li...	1
REST API Base URL	https://www.pageronline.com/...	Use current user's cre...	<input checked="" type="checkbox"/>
Credentials Verificatio...	https://auth.pageronline.com/...	Update customer/con...	Ask
Send Mode	Certification	Do not send Invoices ...	<input checked="" type="checkbox"/>
Business Party Identifi...	%1:%2#%3#%4	Amount Threshold (le...	0.00
Pagero Auth Compan...		Enable Sending of Re...	<input checked="" type="checkbox"/>
Prompt To Change Ac...	<input checked="" type="checkbox"/>	Use E-mail on Custom...	<input checked="" type="checkbox"/>

Web Service Codes

Signup	PAGERO_SIGN_UP	Check Status	PAGERO_STATUS_CHECK
Upload File	PAGERO_UPLOAD_FILE	Check Connection	PAGERO_CHECK_CONNECT

When you check this setting, you will be asked if you want to update e-mails for existing customer (same as action 'Update E-mail Distribution for Customers'). Also, when this setting is checked, Pageros E-mail distribution field 'To:' will be not editable.

E-mail distribution and Party Identification imports

Two imports are available in Pagero Online Settings which helps to add E-mail Distribution and Party Identification for Customers easier. Using these functions, you can import new and modify already existing records in database from excel files.

Excel format for E-mail Distribution:

- This will insert new and modify existing email addresses.
- First (Header) row is ignored.
- Three columns: Customer No.(mandatory), To:(mandatory), Cc:(optional)

Excel format for Party Identification:

- This will only insert new party identification numbers.
- First (Header) row is ignored.
- Three columns: Customer No.(mandatory), Party Identification Scheme(mandatory), Party Identification ID(mandatory)'

Pagero Online Settings

Pagero Online | **Actions** | Fewer options

6 Country specific functions

This section will describe the country specific functions available for customers from these specific countries/localizations.

Spain

DIR3 codes

If you have customers behind PGEF (Puntos generales de entrada de factura, FAcE is the biggest one of them), you will probably need to add the DIR3 codes specific for each customer. Pagero offers multiple way to add the DIR3 codes.

1. You can save the DIR3 codes on the customer cards, the fields for that is highlighted in the picture below.

The screenshot shows a 'CUSTOMER CARD' for '10000 · GDE Distribución S.A.'. The interface includes a navigation bar with 'New Document', 'Request Approval', 'Customer', 'Show Attached', and 'More options'. The 'General' section contains fields for 'No.' (10000), 'Name' (GDE Distribución S.A.), 'Balance (LCY)' (239 467,81), 'Balance Due (LCY)' (0,00), 'Credit Limit (LCY)' (0,00), 'Blocked', 'Total Sales' (85 972,86), 'Costs (LCY)' (22 787,07), and 'Not in ASAT'. The 'Address & Contact' section includes 'ADDRESS' (Plaza del mercado 192, Barcelona, 08010, ES) and 'CONTACT' (Si Humberto Acevedo). Below these are sections for 'Invoicing', 'Payments', and 'Shipping'. A red box highlights the 'DIR3 Codes (Pagero Online)' section, which contains fields for 'Accounting Office', 'Management Agency', 'Processing Authority Unit', and 'Proposing Agency'.

2. If you would like to save more than one set of DIR3 codes for each customer, you can add the DIR3 codes on the contacts linked with the customer. You will later need to select the correct contact before posting a document.

The screenshot shows a 'CONTACT CARD' for 'CO000007 · GDE Distribución S.A.'. The interface includes a navigation bar with 'Process', 'Report', 'Show Attached', 'Page', and 'More options'. The 'General' section contains fields for 'No.' (CO000007), 'Name' (GDE Distribución S.A.), 'Type' (Company), and 'Company Name' (GDE Distribución S.A.). The 'Communication' section includes 'ADDRESS' (Plaza del mercado 192, Barcelona, 08010, ES) and 'CONTACT' (Phone No., Mobile Phone No., Email: gde.distribucion.sa@contoso.com, Home Page, Language Code: ESP). Below these are sections for 'Foreign Trade' and 'DIR3 Codes (Pagero Online)'. A red box highlights the 'DIR3 Codes (Pagero Online)' section, which contains fields for 'Accounting Office', 'Management Agency', 'Processing Authority Unit', and 'Proposing Agency'.

3. You are also able to add/change the DIR3 codes directly on the document before posting.

SALES ORDER

1013 · GDE Distribución S.A.

Release Prepare Documents Order Confirmation Posting Request Approval Show Attached More options

Subtotal excl. VAT (EUR)	0,00	Total excl. VAT (EUR)	0,00
Inv. Discount Amount Excl. VAT (EUR)	0,00	Total VAT (EUR)	0,00
Invoice Discount %	0	Total Incl. VAT (EUR)	0,00

Contract (Pagero Online)

Contract No. Customer Contract No.

Contract Date Customer Contract Date

Additional Information (Pagero Online)

Customer Accounting Reference File Reference

Invoice Period File Reference Date

Additional Description Pay-To Bank Account

Ship-To GLN 8712345000004

DIR3 Codes (Pagero Online)

Accounting Office Processing Authority Unit

Management Agency Proposing Agency

How to Setup IRPF Account

To enter the withholding tax information, the user must setup an IRPF Account. There are two ways to access this, both ways are described below:

- 1) Search for **Chart of Accounts**, select a g/l account line and press **Edit**. Check the box **IRPF Account**.

FICHA CUENTA | FECHA DE TRABAJO: 4/8/2019

4730001 · H.P., retenc. y pagos a cuenta

Procesar Cuenta Saldo Más opciones

General

Nº 4730001

Nombre H.P., retenc. y pagos a cuenta

Ingresos/Saldo Balance

Categoría de cuenta Pasivo

Subcategoría de cuenta Pasivos corrientes

Debe/Haber Ambos

Tipo mov. Auxiliar

Sumatorio

Saldo 0.00

Saldo controlable en diarios

Texto adicional automático

Entrada directa

Cta. regularización

Bloqueado

Fecha últ. modificación 3/24/2019

Omitir descripción predeterm...

Cuenta IRPF

Registro

Tipo de registro gen.

Grupo registro neg. gen.

Grupo registro prod. gen.

Grupo registro IVA neg.

Grupo registro IVA prod.

Nº cuenta IC asociada predet.

Omite descuentos

Plantilla de fraccionamiento pre...

- 2) When entering a new line in document with type **G/L Account**, press lookup on **No.** field and then press **Advanced**. New page will pop up, select a line and press **Edit**. Check the box **IRPF Account**.

FACTURA VENTA | FECHA DE TRABAJO: 4/8/2019

102223 · Adatum Corporation

× Este cliente tiene un saldo vencido. [Mostrar detalles](#)

Posting Prepare Invoice Release Request Approval Pagero Online Categoría 11 Más opciones

General Mostrar más

Nombre del cliente Adatum Corporation Fecha vencimiento 4/30/2019

Contacto Daniel Almaraz Nº sig. factura

Fecha registro 4/8/2019

Líneas Administrar Más opciones

TIPO	Nº	DESCRIPCIÓN	CÓD. ALMACÉN	CANTIDAD	CÓD. UNIDAD MEDIDA	PRECIO VENTA EXCL. IVA	% DESCUENTO LÍNEA	IMPO LÍNEA E.
Cuenta	*	*						

How to setup VAT Posting Setup for IRPF line:

- VAT % must be set to 0;
- VAT Calculation Type must be set to **No Taxable VAT**;
- **Tax Code** must be set to **04**. (This is Spanish code for IRPF. In Spanish sales transactions, usually code **01** (VAT) or **04** (IRPF) is used. For some Spanish regions, there could be other Tax Codes for VAT, but for IRPF it is always the same code).

CONFIG. GRUPOS REGISTRO IVA | FECHA DE TRABAJO: 4/8/2019 ✓ GUARDADO

Buscar + Nuevo Editar lista Eliminar Editar Ver Sugerir cuentas

GRUPO REGISTRO IVA NEG.	TIPO CÁLCULO IVA	CTA. IVA POR PAGAR	CTA. IVA ACREDI	CT... REV IVA	CÓDIGO DE CLÁUSULA DE IVA	SE... A UE	CATEGO... DE IMPUESTO	CÓDIGO IMPUESTO	NO ES UN TIPO IMPONIBLE
	Normal	4770001	4720001			<input type="checkbox"/>	E		
	Normal	4770001	4720001			<input type="checkbox"/>	E		
	Normal	4770001	4720001			<input type="checkbox"/>	E		
	Normal	4770001	4720001			<input type="checkbox"/>	E		
EXPORT.	Normal	4770001	4720001			<input type="checkbox"/>	E		
EXPORT.	Normal	4770001	4720001			<input type="checkbox"/>	E		
EXPORT.	Normal	4770001	4720001			<input type="checkbox"/>	E		
EXPORT.	Normal	4770001	4720001			<input type="checkbox"/>	E		
EXPORT.	No sujeto	4770001	4720001			<input type="checkbox"/>	E		
NAC	Normal	4770001	4720001			<input type="checkbox"/>	S		
NAC	Normal	4770001	4720001			<input type="checkbox"/>	S		
NAC	Normal	4770001	4720001			<input type="checkbox"/>	S		
NAC	Normal	4770001	4720001			<input type="checkbox"/>	E		
NAC	No sujeto	4770001	4720001			<input type="checkbox"/>	E	04	
UE	Reversión	4770001	4720001	4770...		<input type="checkbox"/>	S		
UE	Reversión	4770001	4720001	4770...		<input checked="" type="checkbox"/>	S		
UE	Reversión	4770001	4720001	4770...		<input checked="" type="checkbox"/>	S		
UE	Reversión	4770001	4720001	4770...		<input type="checkbox"/>	E		
UE	No sujeto	4770001	4720001			<input type="checkbox"/>	E		

How to enter the IRPF line in sales document:

- Create a new line in document with type **G/L Account** and choose G/L Account that have the **IRPF Account** checked;
- Enter the tax rate in decimal digits (for example 15% = 0.15) in quantity field, also this rate must be negative. (For service documents amount must be positive);

- Enter amount 'Unit Price', - this amount represents the amount from which withholding tax is calculated. Users should enter all remaining lines sum of **Line Amount** in this field. (For service documents amount must be negative);
- IRPF line must not have VAT or discounts;
- There should be only 1 IRPF line entered in the document.

← PEDIDO VENTA | FECHA DE TRABAJO: 4/8/2019 ✎ + 🗑

101005 · Adatum Corporation

✕ Este cliente tiene un saldo vencido. [Mostrar detalles](#)

Procesar Lanzar Registrar Preparar Pedido Solicitar aprobación Imprimir y enviar Navegar Más opciones

General Mostrar más

Nombre del cliente: Adatum Corporation Fecha vencimiento: 4/30/2019

Contacto: Daniel Almaraz Fecha entrega requerida:

Fecha registro: 4/8/2019 N° documento externo:

Fecha pedido: 4/8/2019

Líneas Administrar Más opciones

TIPO	N°	DESCRIPCIÓN	CÓD. ALMACÉN	CANTIDAD	CANTIDAD RESERVADA	CÓD. UNIDAD MEDIDA	PRECIO VENTA EXCL. IVA	DESCL
Producto	1896-S	Escritorio ATENAS		1	-	UDS	1,005.80	
Cuenta	4730001	H.P., retenc. y pagos a cuenta		-0.15	-		1,005.80	

Application response

When sending invoices to PGEF, you will receive application responses from PGEF or the buyer informing you about the latest status of the invoice, called an application response. The latest application response for each document will be found in the ERP under the posted sales invoice view and in Pagero Online Documents. The application response will be automatically updated in 2017 and onwards 3 times a day (9.00, 12.00 and 17.00 GMT+2). You can also update the status at any time by manually updating the status using the **Update Application Response Status** button found in the posted sales invoice view and in Pagero online documents, this option works also for 2016. The picture below shows the two columns that will be updated, **Recipient Response Status** will give you an indication of the latest status, while **Recipient Response Message** is a description of the status (if any is provided).

Correct Print/Send Show Attached Open in Excel More options

Open Pagero Online Document Card Disable Sending...o Pagero Online Enable Sending ...o Pagero Online Update Document Status Update Applicat...Response Status

WT AT	REMAINING AMOUNT	LOCATION CODE	NO. PRINTED	CLOS...	COR...	SENDING PROFILE	DOCUME... STATUS	RECIPIENT RESPONSE STATUS	RECIPIENT RESPONSE MESSAGE	SEND MODE	USER ID	
50	3 980,50	GRIS	0	No			Not Sent	-	-		DYNAMICST...	Inc
00	0,00	AZUL	1	Yes		PAGERO	Processed	-	-	Certification	DYNAMICST...	NA
00	0,00	AZUL	1	Yes		PAGERO	Processed	-	-	Certification	DYNAMICST...	
00	0,00	AZUL	0	Yes		PAGERO	Not Sent	-	-		DYNAMICST...	
00	0,00	GRIS	0	Yes		PAGERO	Not Sent	-	-		DYNAMICST...	
06	571,06	GRIS	1	No		PAGERO	Awaiting U...	-	-	Certification	DYNAMICST...	No
36	11 959,36	GRIS	0	No		PAGERO	Sending D...	-	-		DYNAMICST...	
00	0,00	AZUL	1	Yes		PAGERO	Processed	-	-	Certification	DYNAMICST...	
00	0,00	AZUL	1	Yes		PAGERO	Not Sent	-	-		DYNAMICST...	
68	5 979,68	GRIS	1	No		PAGERO	Sending D...	-	-		DYNAMICST...	

France

Service code

If you have customers behind CPP (Chorus Pro), service code might be required to add. Service code is used for routing and is specific for each customer. Pagero offers multiple way to add the Service code.

1. You can save the Service code on the customer cards, the fields for that is highlighted in the picture below.

Customer Card | Work Date: 1/26/2023

10000 · Tuotantoyhtymä Oyj

New Document Approve Request Approval Prices & Discounts Navigate Customer Actions Related Reports Fewer options

General Show more

No.	10000	Blocked	
Name	Tuotantoyhtymä Oyj	Total Sales	66,471.14
Balance (LCY)	315,827.26	Costs (LCY)	29,006.59
Balance Due (LCY)	-5,411.00	Pagero Online Payment Group	
Credit Limit (LCY)	0.00		

Address & Contact > 40530 Yht.henkilö Andy Teal

Invoicing > KOTIMAAN KOTIMAAN

Payments > 1k(8PV)

Shipping > SININEN Partial EXW

Service (Pagero Online)

Code		Description	
------------	--	-------------------	--

2. If you would like to save more than one set of Service code for each customer, you can add the DIR3 codes on the contacts linked with the customer. You will later need to select the correct contact before posting a document.
3. You are also able to add/change the Service code directly on the document before posting.

Application response

When sending invoices to Chorus Pro, you will receive application responses from Chorus Pro or the buyer informing you about the latest status of the invoice, called an application response. The latest application response for each document will be found in the ERP under the posted sales invoice view and in Pagero Online Documents. The application response will be automatically updated in 2017 and onwards 3 times a day (9.00, 12.00 and 17.00 GMT+2). You can also update the status at any time by manually updating the status using the **Update Application Response Status** button found in the posted sales invoice view and in Pagero online documents, this option works also for 2016. The picture below shows the two columns that will be updated, **Recipient Response Status** will give you an indication of the latest status, while **Recipient Response Message** is a description of the status (if any is provided).

Correct Print/Send Show Attached Open in Excel More options

Open Pagero Online Document Card Disable Sending...o Pagero Online Enable Sending ...o Pagero Online Update Document Status Update Applicat...Response Status

WT AT	REMAINING AMOUNT	LOCATION CODE	NO. PRINTED	CLOS...	COR...	SENDING PROFILE	DOCUME... STATUS	RECIPIENT RESPONSE STATUS	RECIPIENT RESPONSE MESSAGE	SEND MODE	USER ID	
50	3 980,50	GRIS	0	No	-	-	Not Sent	-	-	-	DYNAMICST...	Inc
00	0,00	AZUL	1	Yes	-	PAGERO	Processed	-	-	Certification	DYNAMICST...	NA
00	0,00	AZUL	1	Yes	-	PAGERO	Processed	-	-	Certification	DYNAMICST...	
00	0,00	AZUL	0	Yes	-	PAGERO	Not Sent	-	-	-	DYNAMICST...	
00	0,00	GRIS	0	Yes	-	PAGERO	Not Sent	-	-	-	DYNAMICST...	No
06	571,06	GRIS	1	No	-	PAGERO	Awaiting U...	-	-	Certification	DYNAMICST...	
36	11 959,36	GRIS	0	No	-	PAGERO	Sending D...	-	-	-	DYNAMICST...	
00	0,00	AZUL	1	Yes	-	PAGERO	Processed	-	-	Certification	DYNAMICST...	
00	0,00	AZUL	1	Yes	-	PAGERO	Not Sent	-	-	-	DYNAMICST...	
68	5 979,68	GRIS	1	No	-	PAGERO	Sending D...	-	-	-	DYNAMICST...	

Finland

In Finland the e-invoice ID to identify the sender/receiver usually are either OVT or IBAN. In standard NAV/BC, there are no standard fields to include these IDs. Pagero have two options to solve this,

- 1) Maintaining a customer directory in Pagero Online, for this approach Pagero will enrich the invoice with correct IDs based on the customer number provided.
- 2) Maintain the IBAN/OVT in NAV/BC by navigating to **customer card** -> **customer** -> **Actions** -> **Party Identification** -> select a "Scheme" and add the ID itself in "ID". With this approach, you need to change the settings in Pagero Online (once) by navigating to **Settings** -> **Company settings** -> **Outbound** -> **Routing** and selecting "On".

arch + New Edit List Delete Show Attached Open in Excel

PARTY IDENTIFICATION + New

SCHEME	ID
FI:OVT	1234567890

ID	SCHEME AGENCY NAME
DUNS	Dun and Bradstreet Ltd
FI:OVT	National Board of Taxes, (Verohallitus)
GLN	GS1
IBAN	SOCIETY FOR WORLDWIDE INTERBANK FI...

+ New Select from full list Close

Singapore

In Singapore the **Tax Category** in **VAT Posting Setup** is required to be able to send electronic documents.

VAT Posting Setup | Work Date: 4/1/2020

Search + New Edit List Delete Edit View Suggest Accounts Copy... Open in Excel More options

VAT Bus. Posting Group	VAT Prod. Posting Group	Description	VAT Identifier	VAT %	VAT Calculation Type	Sales VAT Account	Purchase VAT Account	Reverse Chrg. VAT Acc.	VAT Clause Code	EU Service	Tax Category
	ASSET	Setup for / ASSET	ASSET	10	Normal VAT	*	*			<input type="checkbox"/>	
	GST10	Setup for / GST10	GST10	10	Normal VAT					<input type="checkbox"/>	
	GST15	Setup for / GST15	GST15	15	Normal VAT					<input type="checkbox"/>	
	INPUTTAX	Setup for / INPUTTAX	INPUTTAX	0	Normal VAT					<input type="checkbox"/>	
	NO GST	Setup for / NO GST	NO GST	0	Normal VAT					<input type="checkbox"/>	
DOMESTIC	ASSET	Setup for DOMESTIC / ASSET	SRCA-S	0	Normal VAT	5611	5621			<input type="checkbox"/>	SRCA-S
DOMESTIC	GST10	Setup for DOMESTIC / GST10	SRCA-C	7	Normal VAT	5611	5621			<input type="checkbox"/>	SRCA-C
DOMESTIC	GST15	Setup for DOMESTIC / GST15	SR	7	Normal VAT	5610	5620			<input type="checkbox"/>	SR
DOMESTIC	INPUTTAX	Setup for DOMESTIC / INPUTTAX	INPUTTAX	0	Normal VAT	5650	5650			<input type="checkbox"/>	
DOMESTIC	NO GST	Setup for DOMESTIC / NO GST	ZR	0	Normal VAT	5611	5621			<input type="checkbox"/>	ZR
EXPORT	ASSET	Setup for EXPORT / ASSET	ASSET	0	Normal VAT	5611	5621			<input type="checkbox"/>	
EXPORT	GST10	Setup for EXPORT / GST10	GST10	0	Normal VAT	5611	5621			<input type="checkbox"/>	
EXPORT	GST15	Setup for EXPORT / GST15	GST15	0	Normal VAT	5610	5620			<input type="checkbox"/>	
EXPORT	INPUTTAX	Setup for EXPORT / INPUTTAX	INPUTTAX	0	Normal VAT	5650	5650			<input type="checkbox"/>	
EXPORT	NO GST	Setup for EXPORT / NO GST	NO GST	0	Normal VAT	5611	5621			<input type="checkbox"/>	
MISC	ASSET	Setup for MISC / ASSET	ASSET	10	Normal VAT	5611	5621			<input type="checkbox"/>	
MISC	GST10	Setup for MISC / GST10	GST10	10	Normal VAT	5611	5621			<input type="checkbox"/>	
MISC	GST15	Setup for MISC / GST15	GST15	15	Normal VAT	5610	5620			<input type="checkbox"/>	
MISC	INPUTTAX	Setup for MISC / INPUTTAX	INPUTTAX	0	Normal VAT	5650	5650			<input type="checkbox"/>	
MISC	NO GST	Setup for MISC / NO GST	NO GST	0	Normal VAT	5611	5621			<input type="checkbox"/>	

Standard rated

- **SR** (Local supply of goods and services)
 - o Rate: 7%
- **SRCA-S** (Customer accounting supply made by the supplier)
 - o Rate: N/A
- **SRCA-C** (Customer accounting supply made by the customer on supplier's behalf)
 - o Rate: 7%

Zero rated

- **ZR** (Supplier invoicing goods for export/ provision of international services)
 - o Rate: 0%

Exempt

- **ES33** (Specific categories of exempt supplier listed under regulation 33 of the GST (General) Regulations)
 - o Rate: N/A

Appendix 1

List of published events

Codeunit ID	Publisher Name	Parameters	Description
12070771	OnBeforeRequest	BaseURL, PathQuery, RequestAction	On before connecting to Pagero Rest API (regarding status changes, file sending, new company creation). Used to read values: BaseURL, PathQuery, Request. Subscribe to this event to implement custom logging solution for http requests to be sent to Pagero Online API.
12070771	OnAfterRequest	ResponseStr, HttpStatusCode, ResponseHeaders, BaseURL, PathQuery, RequestAction	On after connecting to Pagero Rest API (regarding status changes, file sending new company creation). Used to read the BaseURL, PathQuery, RequestAction and the response values after the Web Request to Pagero Online. Subscribe to this event to implement custom logging solution for http responses from Pagero Online API

Codeunit ID	Publisher Name	Parameters	Description
12070773	OnBeforeSendDocumentToPageroOnline	PageroOnlineDocument	On before calling Pagero Online API to send any type of document to Pagero Online. PageroOnlineDocument stores all information needed for sending (e.g. Document type, document No., Electronic Document BLOB). You can read values for custom logging or manipulate values of PageroOnlineDocument to change logic of API Call.
12070773	OnBeforeAssignCompanyAuthID	PGNDocuments PageroAuthCompanyID	On before calling Pagero Online API to send any type of document to Pagero Online. PageroAuthCompanyID stores information to which account document should be sent in Pagero Online. (Replaced by OnBeforeAssignCompanyAuthID100 in BC190 AppSource)
12070773	OnBeforeAssignCompanyAuthID100	PGNDocuments PageroAuthCompanyID	On before calling Pagero Online API to send any type of document to Pagero Online. PageroAuthCompanyID stores information to which account document should be sent in Pagero Online.
12070773	OnAfterSendDocumentToPageroOnline	PageroOnlineDocument, StatusCode	This event is triggered just after receiving response from Pagero Online API, but before processing it in NAV. Could be used for custom logging solutions or filling additional properties in posted sales documents after document is processed.
12070774	OnBeforeSubmitDocumentToPageroOnline	DocNo DocType	On before submitting any type of document for sending to Pagero Online (after using "Send" Action in Sales or Service Documents). There is possibility to read the Document No. and Document Type before electronic document is generated and execute additional validation logic (e.g. Manipulate NAV document before it is submitted for sending)
12070774	OnBeforeSendElectronicDocumentToRegister	HeaderDoc, PGNDocument, SendType	Event is triggered just before exporting electronic document to XML format. Alter HeaderDoc variant, to change values of fields to be exported to document.
12070801	OnAfterValidateSalesShipToCodeEvent	SalesHeader PGNShipToGLN	Event is triggered when Ship-to Code is assigned and Pagero Online logic assigns value to PGN Ship-To GLN field. Alter PGNShipToGLN to assign custom value for PGN Ship-To GLN field.
12070801	OnAfterValidateServiceShipToCodeEvent	ServiceHeader PGNShipToGLN	Event is triggered when Ship-to Code is assigned and Pagero Online logic assigns value to PGN Ship-To GLN field. Alter PGNShipToGLN to assign custom value for PGN Ship-To GLN field.
12070785	OnAfterAssignTaxPointDate	TaxPointDate, SalesHeader	On after assigning Tax Point Date to electronic document. Alter TaxPointDate variable to assign custom value for electronic document TaxPointDate property in electronic document format.
12070785	OnAfterAssignPaymentID	SalesHeader, PaymentID	On after assigning Payment to electronic document. Alter Payment ID variable to assign custom value for electronic document PaymentID property in electronic document format.
12070785	SetUseSellToAccountingCustomerPartyInfo	UseSellToInfo	Used to set to use sell-to customer information for general accounting customer party information.

Codeunit ID	Publisher Name	Parameters	Description
12070785	SetUseSellToAccountingCustomerPartyContact	UseSellToInfo	Used to set to use sell-to customer information for accounting customer party contact information.
12070785	SetUseSellEndPoint	UseSellToInfo	Used to set to use sell-to customer information for accounting customer party endpoint.
12070785	SetUseSellToReportSelection	UseSellToInfo	Used to set to use sell-to customer settings for pdf report printout.
12070785	OnAfterAssignCustomerPartyContact	SalesHeader CustContactID CustContactName CustContactTelephone CustContactTelefax CustContactElectronicMail	Used to change contact information of the customer.
12070785	OnAfterAssignItemInfo	SalesLine Description Name SellersItemIdentificationID BuyersItemIdentificationID StandardItemIdentificationID StdItemIDSchemeID OriginCountryIDCode OriginCountryIDCodeListID	Used to change item information on document line
12070785	OnAfterAssignAccountingCustomerPartyTaxScheme	SalesHeader CustPartyTaxSchemeCompanyID CustPartyTaxSchemeCompIDSchID CustTaxSchemeID	Used to change customer VAT information
12070785	OnAfterAssignAccountingSupplierPartyTaxScheme	SalesHeader CompanyID CompanyIDSchemeID TaxSchemeID	Used to change supplier VAT information
12070785	OnAfterAssignOrderReference	RecRef OrderReferenceID OrderReferenceDate OrderReferenceType	Used to change order reference information on header level
12070785	OnAfterAssignOrderLineReference	SalesHeader SalesLine SalesShptHeader LineOrderReferenceID LineOrderReferenceIssueDate Number DocType	Used to change order reference information in line level. Number: 1 – Issuer, 2 – Buyer
12070785	OnAfterAssignUnitCode	SalesLine unitCode	Used to change unit of measure code in line level
12070785	OnAfterAssignBaseQuantityUnitCode	SalesLine unitCode	Used to change unit of measure code for base quantity in line level
12070785	OnAfterAssignEmailDistribution	SalesHeader UseSellTo EndPointID	Used to change endpoint (email distribution) information in xml document

Codeunit ID	Publisher Name	Parameters	Description
12070785	OnAfterAssignSupplierPartyLegalEntity	SalesHeader PartyLegalEntityRegName PartyLegalEntityCompanyID PartyLegalEntitySchemeID SupplierRegAddrCityName SupplierRegAddrCountryIdCode SupplierRegAddrCountryIdListId SupplierRegAddrStreetName SupplierRegAddrPostalZone	Used to change company legal entity and address information.
12070785	OnAfterAssignAdditionalDescription	SalesHeader Note	Used to change additional description.
12070785	OnBeforeGeneratePresentationPDF	DocType ReportID Parameter DocVariant LayoutID	On Before PDF presentation is generated. Used to change report ID and pass custom parameter to presentation report.
12070785	OnBeforeSavePresentationPDF	DocType ReportNo Parameters DocVariant LayoutID OutStreamPDF SkipSave	On Before PDF presentation is saved. Used to run custom code before generating PDF presentation. For example, running Codeunit or Processing Only Report before running Report for PDF presentation. If event returns OutStreamPDF value, set SkipSave = true. This will prevent default code execution.
12070785	OnAfterGeneratePresentationPDF	OutStreamPDF	On after PDF presentation is generated. Used to manipulate generated PDF file, for example, to digitally sign document.
12070785	OnAfterAssignWorkDescription	SalesHeader AdditionalNote	Used to change Work Description.
12070785	OnAfterAssignAccountingSupplierPartyContact	SalesHeader ContactName Telephone Telefax ElectronicMail	Used to change accounting supplier party contact information
12070785	OnAfterGetTaxExemptionReasonCode	TaxExemptionReasonCode TempVATAmtLine	Used to change Tax Exemption reason information (Replaced by OnAfterGetTaxExemptionReasonInfo in BC190 AppSource)
12070785	OnAfterGetTaxExemptionReasonInfo	TaxExemptionReasonCode TaxExemptionReason TempVATAmtLine	Used to change Tax Exemption reason information
12070791	OnAfterUpdateSalesInvoiceStatus	Sales Invoice Header"	On after Pagero Online Document Status is updated in Sales Invoice Document (and at the same time Pagero Online Document). Used to read or modify "Sales Invoice Header" record after Pagero Online Document status is updated.
12070791	OnAfterUpdateSalesCrMemoStatus	"Sales Cr.Memo Header"	On after Pagero Online Document Status is updated in Sales Credit Memo Document (and at the same time Pagero Online Document). Used to read or modify "Sales Cr. Memo Header" record after Pagero Online Document status is updated.
12070791	OnAfterUpdateServiceInvoiceStatus	"Service Invoice Header"	On after Pagero Online Document Status is updated in Service Invoice Document (and at the same time Pagero Online Document). Used to read or modify "Service Invoice Header" record after Pagero Online Document status is updated.

Codeunit ID	Publisher Name	Parameters	Description
12070791	OnAfterUpdateServiceCrMemoStatus	"Service Cr.Memo Header"	On after Pagero Online Document Status is updated in Service Credit Memo Document (and at the same time Pagero Online Document). Used to read or modify "Service Cr. Memo Header" record after Pagero Online Document status is updated.
12070796	OnBeforeValidateDocumentHeader	SalesHeader	Used to add additional validation for document header.
12070796	OnBeforeValidateDocumentLine	SalesLine	Used to add additional validations for document line.
12070805	OnAfterAssignPaymentMeansPayeeFinancialAccount	SalesHeader PGNSalesHeader PayeeFinancialAccountID PaymentMeansSchemeID FinancialInstitutionBranchID FinancialInstitutionID FinancialInstitutionSchemeID FinancialInstitutionName Type SkipBankAccountAddressInformation	On after payee financial account assigned, used to adjust account information if needed. Variable Type id used to determine type of account: 1 – IBAN 2 – Bank Account no. 3 – Giro No. (SE only) 4 – Plus Giro No. (SE only)
12070805	OnAfterAssignAdditionalNote	SalesHeader DocType AdditionalNote	Used to add additional free text note to xml document.
12070805	OnAfterAssignAdditionalLineNote	SalesLine DocType AdditionalNote	Used to add additional free text note to xml document line.
12070805	SetUseSellToAccountingCustomerPartyPostalAddress	UseSellToInfo	Used to set to use sell-to customer information for accounting customer party address information
12070805	SetUseSellToPartyIdentificationInfo	UseSellToInfo	Used to set to use sell-to customer information for accounting customer party identification information
12070805	GetAdditionalDocumentReferenceDNEventSetAdditionalDocumentReferenceHeaderDN	SalesHeader AdditionalDocumentReferenceDN	Used to set delivery note number to document header.
12070785	OnAfterAssignExternalDocumentHeader	RecRef OrderReferenceID OrderReferenceDate	Used to set External document number to document header
12070805	OnAfterAssignDocumentReferenceLine	SalesHeader PGNSalesHeader SalesShptHeader DocumentReferenceID DocumentReferenceIssueDate DocReferenceDocumentTypeCode DocumentReferencelistID	Used to set delivery note number on document line level.
12070805	OnAfterCollectCompanyPartyIdentification	ITMPPGNCompanyPartyIdentification PartyLegalEntitySchemeID	Used to change company party identification information
12070805	OnAfterAssignCustomerPartyLegalEntity	Customer CustPartyLegalEntityCompanyID CustPartyLegalEntityIDSchemeID	Used to change customer legal entity information.
12070805	OnAfterCollectCustomerPartyIdentification	Customer ITMPPGNCompanyPartyIdentification CustPartyLegalEntityIDSchemeID	Used to change Customer party identification information
12070805	OnAfterGetAccountSupplierAdditionalInfo	SalesHeader ExemptionReason	Used to change company tax registration status in xml document.
12070805	OnAfterGetAccountingSupplierPartyPostalAddress	SalesHeader StreetName SupplierAdditionalStreetName CityName PostalZone CountrySubentity IdentificationCode ListID	Used to change company address information.

Codeunit ID	Publisher Name	Parameters	Description
		PostBox	