



mseDoc365



Document Delivery and Receipt
with Microsoft Dynamics 365 Business Central



Microsoft Dynamics 365
Business Central



✕ Rechnung

✕ ZUGFeRD



mse
Software

What is mseDoc365?

Document Delivery & Receipt

in Microsoft Dynamics
365 Business Central



ZUGFeRD



XRechnung



Fax



Portal



EDI



De-Mail



Peppol



E-Mail



Letters
via Lettershop



openTRANS



INCA-Mail



El. Signature

and many more



On Time - **Compliant & Future-Proof**

- **Starting in 2025** every company in Germany must be able to receive & archive XRechnungen
- **Since 2020** XRechnung has been mandatory for invoicing federal authorities and public institutions.

Reduce Cost & **Increase Efficiency**

- Short implementation time, cost reduction, process standardization, environmental protection.

In & Out - **Highly Automated**

- Receive, interpret, process, generate, transmit, and archive documents such as XRechnung, ZUGFeRD, PDF, and scanned records.

New Delivery Methods & Technologies Regularly Updated

NEW



AI-OCR



Learning-By-Doing



PDF2Form
2Dynamics



OnPrem-Cloud
Transfer



What is mseDoc365?

- mseDoc365 is a **standard extension for your Microsoft Dynamics 365 Business Central** system for the standardized creation, receipt, dispatch and storage of documents
- **Complete operation in your familiar Dynamics environment.** Secure transfer between your Dynamics system and the optional receipt & dispatch service
- **Continuous expansion of receipt and dispatch types**, the framework, and standard process steps — allowing you to build customized workflows.
- Can be obtained by **any Dynamics user** (ask your Dynamics partner or us)
- **Available for all Microsoft Dynamics 365 Business Central versions from BC15** (as universal code for Cloud and OnPrem. A previous version from Dynamics 2009 is also available on request)

OUR GOAL IS YOUR ADVANTAGE

- **Price and speed advantages**
No more printing, enveloping, franking, or manual handling.
- **Process optimization**
Through unified document creation, dispatch, and archiving
- **Reduced working time**
by reducing manual effort and work
- **Elimination of local investments**
in fax machines, printers, franking or enveloping devices
- **Short implementation periods**
supported by our experts and easy-to-use interface
- **Environmentally friendly**
communication thanks to the elimination of paper-based documents

- **Save on Sending and Receiving**

No Matter Which Channel You Use

- **For your recipients — and for you.**

Offer recipients their preferred transmission channel while simultaneously standardizing your internal workflows.

- **Up-To-Date**

Through cloud-based online services supporting all document formats

- **Everything from a single source**

Unified billing and consolidated dispatch ensure effective, transparent, and inexpensive document exchange

All Technologies

READY FOR ANY SITUATION

OneForAll



Dispatch of all media and formats with one click in NAV via a standardized process.

FlexStep



Flexibility by breaking down processing into process steps that are individually configured, monitored and documented.

MultiTemplate



Configuration is template-based: process steps can be assembled modularly from the large standard library. Templates can also be selected automatically within the workflow.

FlexPDF



Electronic stationery (PDF format) with logo and gradients enables and simplifies Dynamics report designs that go far beyond the Dynamics standard. Further PDF operations: Stamp, merge, rotation and many more

MultiInvoices



Fully automatic mass mailing of, for example, 1000 invoices "with one click" to each recipient in their desired mailing method.

MultiReport



All Dynamics print reports are available with minimal effort: Invoice, credit note, reminder, quotation, purchase order, payroll & HR documents, individual documents, etc.

VariDoc



Automatic creation of individualized documents (e.g. cover letter e-mails) from templates based on your Dynamics data.

SmartTrack



Monitoring and documentation of all production, dispatch and storage steps.

MultiAttach



Any number of attachments can be added individually by the user, specified by template, created by process step or transferred from third-party applications. They can be sent in parallel or integrated into the main document.

ErrorResistant



mseDoc365 immediately reacts to errors during document generation or transmission (e.g. incorrect recipient data, network failure, etc.) and automatically isolates them. Successful dispatch of error-free data continues seamlessly, while faulty transmissions are re-processed afterward.

PairPlay



Client steps and pauses can be configured alternately with server steps for control and input, e.g. for attaching attachments. All software components can be installed centrally on the server side. There is no need for time-consuming setup and maintenance on the clients.



FastSign

Legally valid signatures, exchanged digitally, seal orders and agreements faster and more securely. With mseDoc365, you can request and/or provide these quickly and cost-effectively. Externally or internally, with any desired security level.

SmartTarget



Management of any number of shipping destinations per Dynamics customer, vendor, person and company contact or employee. Automatic situation-related selection, including possible changes and their adoption as future default settings. Dispatch destinations are method + address (e.g. mail, fax, letter)



MicroInvasive

Full integration into Microsoft Dynamics, with minimal intervention in the Dynamics standard. Linking of e-receipts with all relevant Dynamics master and transaction data. Minimal administration, maintenance and update effort thanks to "micro-invasive" integration in all print reports. This means that it can also be easily integrated in Dynamics industry solutions and in highly individualized Dynamics systems.

ArchiveReady



Standardized storage in the Dynamics database or in a flexibly configurable file system. Optimum connection options to established archive systems such as ELO, EasyArchive, d.velop, SharePoint etc.



PDF2Form 2Dynamics

With mseDoc365 you can design and send your individual PDF forms. Your business partner receives this PDF by e-mail, for example, fills in the fields and with one click in the PDF, their details land directly in your Microsoft Dynamics 365 Business Central: unsurpassed simplicity and flexibility without any programming.

On-PremCloud Transfer



File transfer in both directions when parts of your overall system are already in the cloud, while others are still on-premises (e.g., scanned signed PDF delivery notes in an on-premises directory should be sent with invoices from the cloud).

Learning By-Doing



Through 'Learning-By-Doing', document processes are increasingly relieved from manual user decisions, leading up to fully automated processing. Documents such as XRechnung (EN 16931-1), ZUGFeRD, etc., as well as PDFs, are thus received, read, and processed (IN) with progressively less effort, or generated, sent, and archived (OUT).



AI-OCR

With the new AI-OCR, PDF invoices/scanned documents are processed almost as automatically as X-invoices. This allows for a seamless and timely transition to automated document entry, which brings benefits regardless of the percentage of incoming X/ZUGFeRD invoices.



All Transmission Methods

All Formats

EMAIL



The conventional e-mail remains a cost-effective dispatch method for scenarios where security, confidentiality, or proof of delivery are of lesser importance.

mseDoc365 automatically selects the correct recipient address, generates the subject line and message body using your Dynamics 365 BC data, and attaches the e-document including XML and supplementary files — either as single or multiple attachments.



DE-MAIL

Based on the German De-Mail law, this service enables secure, confidential, and verifiable communication over the internet.

Although built upon standard e-mail technology, De-Mail is technically separated and provided exclusively by authorized De-Mail providers.

mseDoc365 integrates seamlessly with De-Mail, connecting your ERP system with minimal administrative setup.

FAX



Send faxes just as easily and consistently as letters or emails when the recipient requires this “first-generation” electronic transmission method. No fax device, fax server, or additional hardware/software is needed — meaning no investment, installation, or maintenance overhead. A single click in the D365BC client is sufficient.



INCAMAIL

IncaMail is a Swiss Post service for the secure and verifiable sending of confidential e-mails. The content is sent highly encrypted using conventional e-mail technology. The recipient decrypts via the IncaMail portal, where recipients register free of charge upon first use. mseDoc365 connects your ERP system to IncaMail with minimal effort.

PORTAL



Web portals can be used both for uploading and downloading e-documents on the sender or recipient side.

Our cloud service partner offers a secure and free portal for receiving electronic invoices.

Optional connections to private or governmental portals can be configured, ensuring that the needs of every recipient are met.



PEPPOL

PEPPOL (Pan-European Public Procurement OnLine) is a secure European transmission network for electronic invoices and related business documents. Organizations and authorities within PEPPOL are automatically authenticated via their PEPPOL ID. mseDoc365 supports PEPPOL connectivity for cross-border compliant e-invoicing and procurement transactions.

OPENTRANS



openTRANS, developed by the Fraunhofer IAO, is an established open XML schema for electronic data exchange in business transactions. The openTRANS structure can be used as the XML foundation for e-documents within mseDoc365.

XRECHNUNG



An XML-based format compliant with EN 16931-1 (European Committee for Standardization). From January 1, 2025, all German companies must be capable of receiving and archiving XRechnungen as mandated by the Wachstumschancengesetz (Growth Opportunities Act). Since 2020, XRechnung has already been mandatory for invoicing federal and public authorities. This makes the electronic invoice the new standard in Germany — after decades of slow adoption despite its significant efficiency potential.

ZUGFERD



ZUGFeRD, developed by the Forum elektronische Rechnung Deutschland (FeRD), is a fast-growing e-invoice standard. It consists of a PDF/A-3 file containing an embedded XML data structure compatible with XRechnung, ensuring audit-proof archiving and seamless data exchange.

QUALIFIED ELECTRONIC SIGNATURE



Using a qualified electronic signature (as defined by German signature law), the authenticity and integrity of electronic documents can be ensured. mseDoc365 connects to certified signature centers, enabling automated signing processes directly from Dynamics 365 BC.



LETTER/ HYBRID MAIL

Send documents electronically and have them physically delivered as letters through hybrid mail services (Lettershop).

Save money: postage and production costs are significantly reduced.

Save time: staff effort and delivery times are minimized.

Optimize processes: unified handling for all media types — “one-click dispatch,” full status tracking, and document archiving within D365BC.

Increase recipient satisfaction: recipients continue to receive familiar paper letters until they choose to switch to electronic formats.

Optional in-house dispatch: documents can be pre-printed, enveloped, and delivered in bulk packages for internal distribution — ideal for payroll documents. Our Lettershop partners operate high-security output management centers, allowing even companies with low document volumes to benefit from enterprise-grade cost efficiency in printing and mailing.



ELECTRONIC DATA INTERCHANGE

EDI refers to the general concept of electronic data transfer between business systems. Beyond the formats listed above, mseDoc365 provides integration to hundreds of additional EDI standards and protocols through cloud transfer and format conversion — enabling compliance with the requirements of nearly any recipient.

MODULAR ADDONS

mseDoc365 Comfort

**Merge + Copy Dispatch +
Separate Postal Address + Serial Mail +
Internal Attachments + Individual Mail Editor**

Main documents and attachments can be merged into a single PDF file. Documents can be resent as copies any number of times, with optional bitmap or text copy stamps. A separate postal dispatch address can be defined per recipient and document type via cover sheet. Provides perfect serial mail management directly inside D365BC. Internal attachments can be stored for documentation without being sent externally. Pre-generated emails can be easily customized via the built-in mail editor.

mseDoc365 Payroll & Dispatch

**Optionally available for Lessor/NAPA3
Payroll.**

Secure dispatch and management of payroll statements and HR documents, for example via the IncaMail method and/or the Swiss Post Lettershop, sent directly to employees — or pre-printed, enveloped, and delivered as pre-bundled internal distribution packages.

mseDoc365 File Archive

Time- or event-based archiving and retrieval of all files into a configurable file archive, defined using eDoc variables — helping to reduce database load in Dynamics 365 BC. Files remain accessible to authorized D365BC clients and can be automatically re-imported into the database when needed. The archive path does not need to be accessible on the client, providing additional data security and simpler configuration.

mseDoc365 Reception

Incoming emails and their attachments can be conveniently managed within D365BC, just like outgoing messages.

They can be linked to customers, vendors, or contacts based on sender address, and to transactions where the ID number is included in the email subject line. Optional automatic import of invoice data (e.g. via XRechnung, ZUGFeRD, or openTRANS) is supported for seamless integration.

mseDoc365 Archive Integration

Interfaces available for EasyArchive, ELO, and SharePoint, among others.

Perfect for future upgrades to the eDocs File Archive module, should an established enterprise archiving system be added later.

Data import and integration are handled as if the archive system had been part of the setup from the beginning.

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