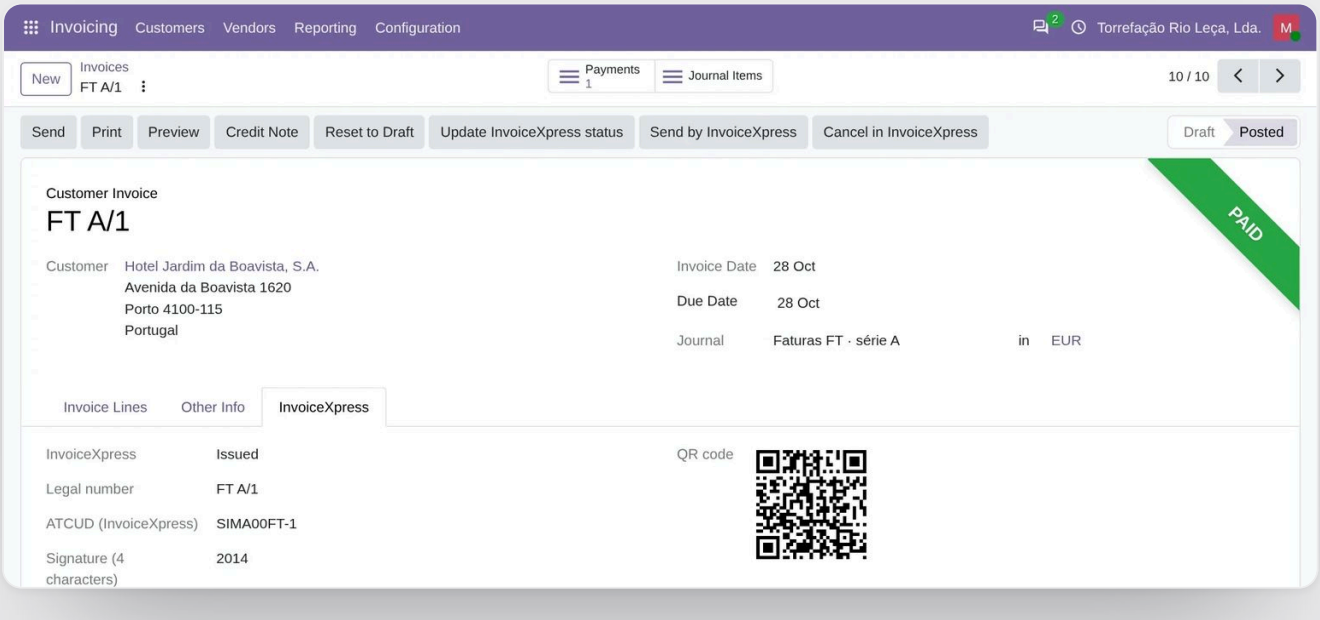
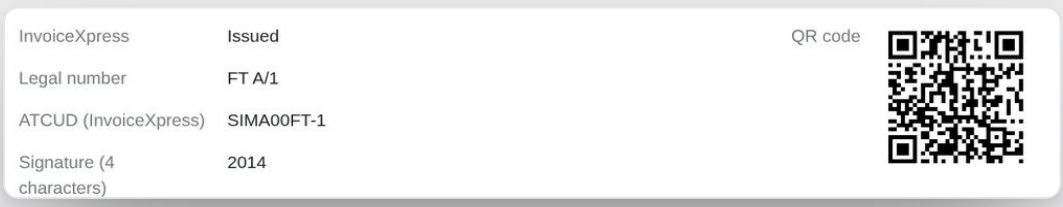
CONNECTOR GUIDE · INVOICING AND TAX

InvoiceXpress connector for Odoo

Issue the invoices you confirm in Odoo in InvoiceXpress and keep their legal number, ATCUD and signature.

Odoo 17 · 18 · 19 · 20 | 14-day trial, no card | Edition of 19-11-2026





Real Odoo 20 screenshot. An invoice confirmed in Odoo and issued in InvoiceXpress, with its InvoiceXpress tab expanded: the legal number, the ATCUD, the signature and the QR code.

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This guide describes version 20.0.1.1.1 of the module (Odoo branch 20.0, commit 54681c57e). Everything in it comes from its published code, the platform's official documentation or real screenshots.

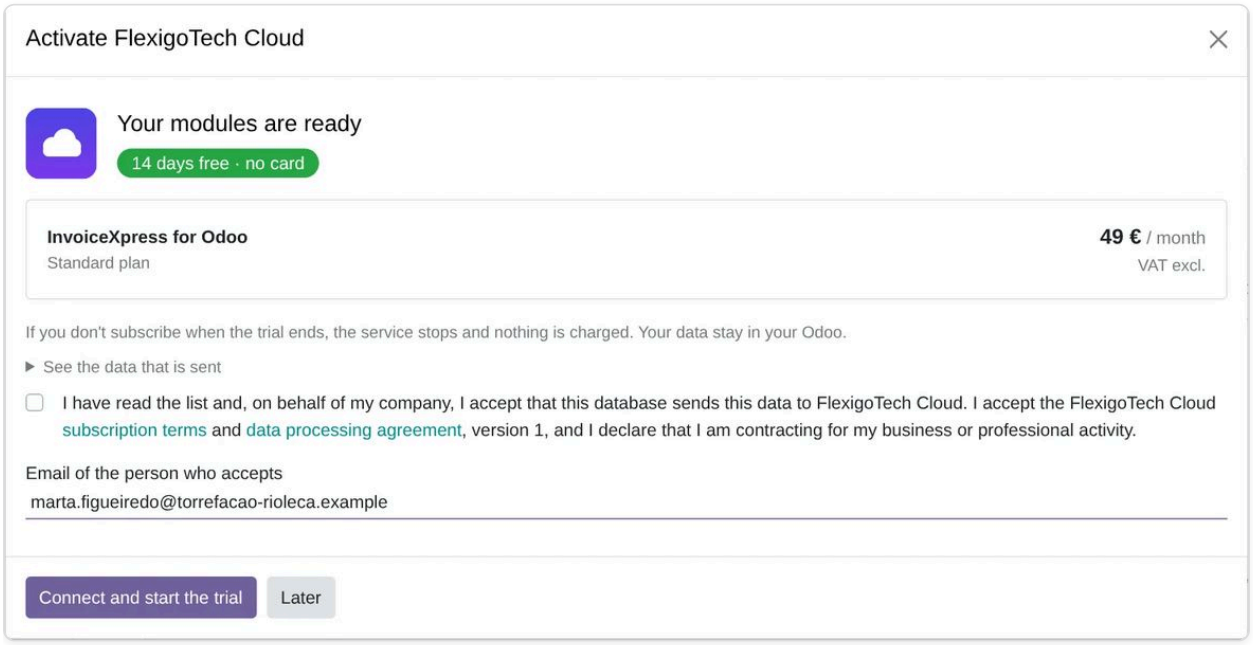
The screenshots come from a test Odoo 20 database, with a made-up company and data and no real connection to InvoiceXpress. The module also has a version for Odoo 17, 18 and 19.

1 Who it is for and what it solves

The connector requires a FlexigoTech Cloud subscription, with a 14-day free trial and no card needed. Without the trial or the subscription, the connector does not issue anything.

Odoo is not an AT-certified invoicing program, and the connector does not turn it into one. In Portugal, companies with their seat, permanent establishment or domicile in the country must invoice only with software that the AT has certified beforehand if they billed more than €50,000 the previous year, if they use an invoicing program, or if they keep organised accounting (Decreto-Lei 28/2019, art. 4, no. 1). With the connector, each document is issued by InvoiceXpress under its own AT certification, which is the one printed on it, and Odoo stores its legal number, its ATCUD, its signature and its PDF.

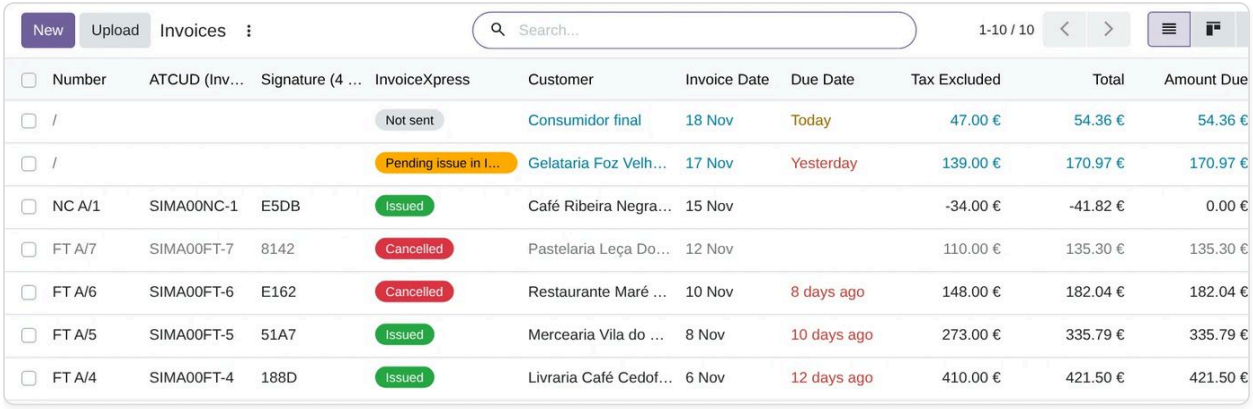
Today credit notes, debit notes, simplified invoices (FS) and invoice-receipts (FR) fail against live InvoiceXpress: InvoiceXpress rejects them because the connector sends them with the FT invoice series. This is fixed in the next version of the module.



- **Real Odoo 20 screenshot.** The screen to activate FlexigoTech Cloud and start the 14-day trial.

In Odoo you keep the customers, the orders and the invoices, but the legal document, with its number, ATCUD and signature, is issued by InvoiceXpress. Without the connector, someone repeats in InvoiceXpress every invoice already in Odoo, copies the legal number back, and checks by hand whether the document was cancelled or paid.

With the connector, the invoice you confirm in Odoo is issued in InvoiceXpress and comes back with its legal number, ATCUD and signature. It is activated per sales journal.



Number	ATCUD (Inv…	Signature (4 …	InvoiceXpress	Customer	Invoice Date	Due Date	Tax Excluded	Total	Amount Due
/			Not sent	Consumidor final	18 Nov	Today	47.00 €	54.36 €	54.36 €
/			Pending issue in I…	Gelataria Foz Velh…	17 Nov	Yesterday	139.00 €	170.97 €	170.97 €
NC A/1	SIMA00NC-1	E5DB	Issued	Café Ribeira Negra…	15 Nov		-34.00 €	-41.82 €	0.00 €
FT A/7	SIMA00FT-7	8142	Cancelled	Pastelaria Leça Do…	12 Nov		110.00 €	135.30 €	135.30 €
FT A/6	SIMA00FT-6	E162	Cancelled	Restaurante Maré …	10 Nov	8 days ago	148.00 €	182.04 €	182.04 €
FT A/5	SIMA00FT-5	51A7	Issued	Mercearia Vila do …	8 Nov	10 days ago	273.00 €	335.79 €	335.79 €
FT A/4	SIMA00FT-4	188D	Issued	Livraria Café Cedof…	6 Nov	12 days ago	410.00 €	421.50 €	421.50 €

- **Real Odoo 20 screenshot.** The **Invoices** list with the columns **ATCUD (InvoiceXpress)** and **Signature (4 characters)**.

What changes day to day

- You confirm the invoice in Odoo and it comes back with its legal number.
- If InvoiceXpress does not respond, the invoice stays pending and the connector retries it every minute.
- Payments issue their receipts in InvoiceXpress.
- Printing and sending use the legal PDF from InvoiceXpress.
- What is cancelled in InvoiceXpress is reflected in the Odoo invoice.

What it does not do

- It does not work without the FlexigoTech Cloud subscription: without an active service it issues nothing.
- It does not turn Odoo into an AT-certified invoicing program: the legal document is issued by InvoiceXpress.
- It does not create your InvoiceXpress account nor store your AT credentials in Odoo: both are kept in InvoiceXpress.
- It does not handle quotes or transport guides from InvoiceXpress: only invoices, simplified invoices, invoice-receipts, credit and debit notes, and the receipts for collections.
- An invoice carries a single exemption reason: if it has exempt lines for different reasons, it must be split in two.
- It does not identify customers by name: it matches them by a fixed code.

How it was tested. InvoiceXpress has no sandbox environment: its 30-day trial is a live account that does not report documents to the AT. The connector has been tested against a simulator built from the official InvoiceXpress API definition (OpenAPI 3.1): every request is checked against the official schemas and the documented responses are reproduced. Among its 143 automated tests, some cut the connection at each step of an issue and check that InvoiceXpress always ends with a single document. On 17 November 2026 it was also tested with a live InvoiceXpress trial account, through FlexigoTech Cloud and with version 1.1.0 of the connector for Odoo 19: saving the InvoiceXpress key, testing the connection, fetching the series and taxes, fetching without duplicating the invoices issued outside Odoo, and checking that the connector does not issue without a series registered with the AT. A trial account cannot register series, so issuing was tested by removing that check only in the test: an FT invoice with its legal number, its signature and its legal PDF, the RG receipt for a partial payment, a cancellation with a reason, and an interrupted issue that is retried without creating another invoice. Today credit notes, debit notes, simplified invoices (FS) and invoice-receipts (FR) fail against live InvoiceXpress: InvoiceXpress rejects them because the connector sends them with the FT invoice series. This is fixed in the next version of the module. The real ATCUD and QR code require a series registered with the AT, which a trial account cannot have. The screens are from Odoo 20, with invented data and the simulator's responses.

2 The connector in figures

4
versions of Odoo: 17, 18, 19 and 20

6
scheduled tasks, active on installation

3
accounts on the Standard plan (10 with Pro)

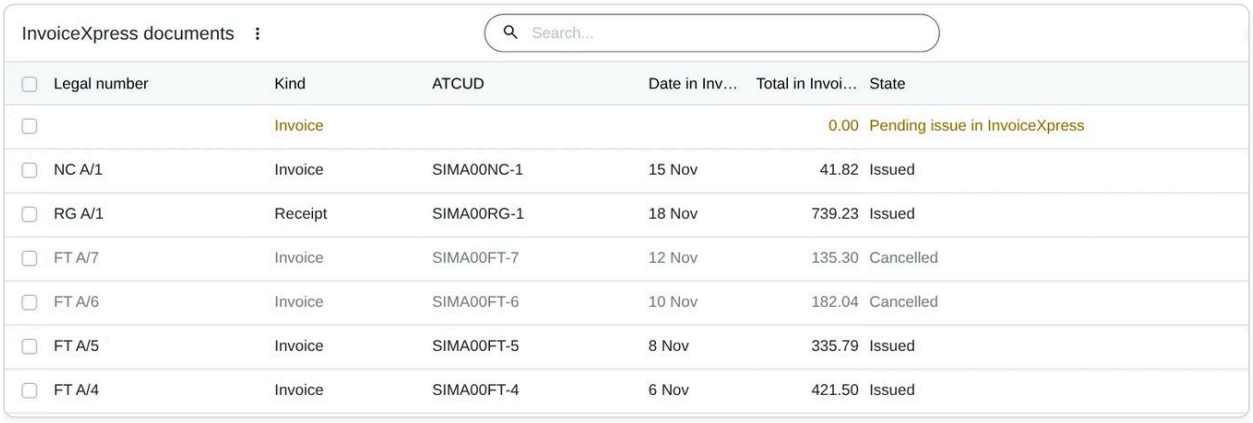
14
days of free trial, no card needed

143
tests across 10 files

8
menus specific to the module

It only depends on the Invoicing module of Odoo, which is in Community, and on FlexigoTech Cloud: it works in Community and in Enterprise. There is a branch of the module for each of Odoo versions 17, 18, 19 and 20.

3 Where you see it in your Odoo



- **Real Odoo 20 screenshot.** The **InvoiceXpress documents** list, with legal number, ATCUD, date, total and status.

Invoicing › Configuration › InvoiceXpress	The connector's submenu in the Invoicing configuration, for invoicing users.
Series	Opens the **InvoiceXpress series** list, with the AT validation code of each series.
Taxes	Opens the **InvoiceXpress taxes** list.
Fetch from InvoiceXpress	Opens the wizard that brings in the documents issued from the InvoiceXpress web or app. Only accounting managers see it.
Link existing contacts	Opens the wizard that matches your InvoiceXpress customers with the Odoo contacts.
Operation log	Opens the **InvoiceXpress operation log**, with each call, its result and its time. Only accounting managers see it.

Outside that submenu, the connector adds **InvoiceXpress documents** under **Invoicing › Customers** and **SAF-T (PT) from InvoiceXpress** under **Invoicing › Reporting**. The connection is configured in **Settings**, in the

InvoiceXpress (Portugal) block of the **Invoicing** section. In addition, the invoice, the sales journal and the contact have an **InvoiceXpress** tab; the invoice has the buttons **Retry in InvoiceXpress**, **Update InvoiceXpress status**, **Send by InvoiceXpress** and **Cancel in InvoiceXpress**; the payment has its **InvoiceXpress receipts**; and the sales tax has the fields **InvoiceXpress tax** and **AT exemption reason**.

4 What you need before you start

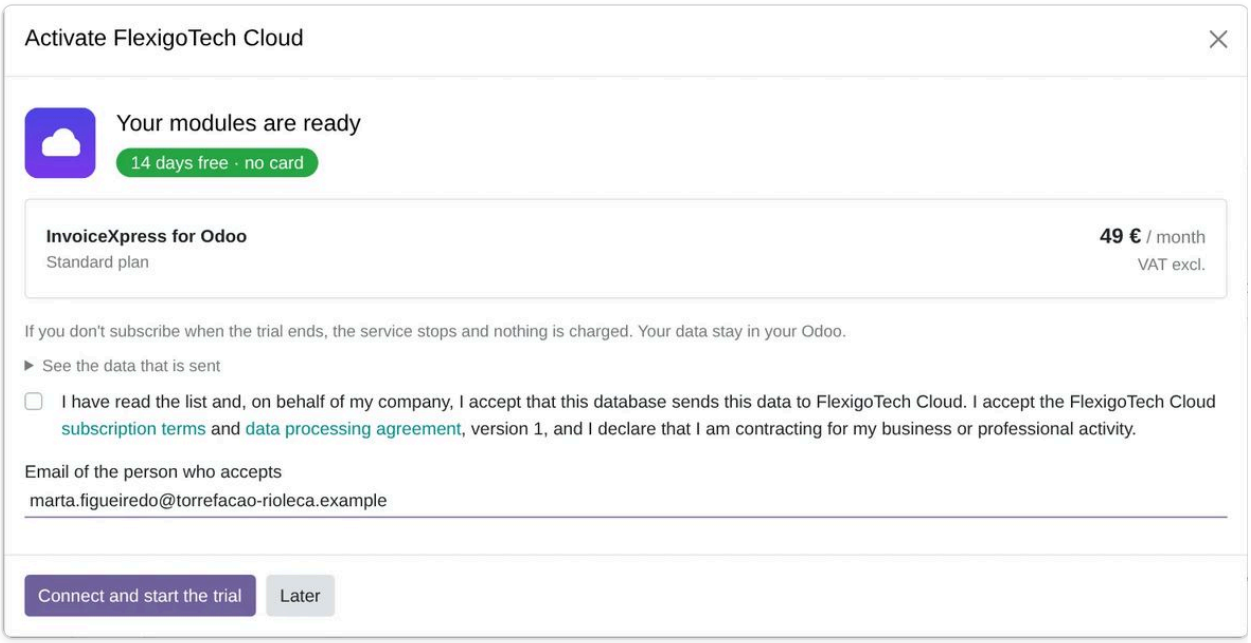
- You need a paid InvoiceXpress account that you have opened yourself and with the AT connected. The 30-day trial is no use for issuing from Odoo: it does not report documents to the AT and its series cannot be registered, because registering one requires the Portal das Finanças credentials, so it stays at N/D and the connector does not issue with it. You need the account name, which is the part before .app.invoicexpress.com in the address you sign in with, and the API key, which is in InvoiceXpress under Account › Integrations › API.
- The AT credentials configured in InvoiceXpress, not in Odoo: with them InvoiceXpress communicates the documents and registers the series.
- Odoo 17, 18, 19 or 20, on Odoo.sh or on your own server. In Odoo Online third-party modules cannot be installed, so the connector does not work there.
- An administrator user. Only an administrator can change the InvoiceXpress connection.
- The FlexigoTech Cloud module, which the connector depends on. Calls to InvoiceXpress go through FlexigoTech Cloud, and without a trial or subscription nothing is sent to InvoiceXpress.

> The connector does not create your InvoiceXpress account. A new series created from Odoo starts unregistered with the AT and issues nothing until you register it with **Register in the AT**.

It is installed like any third-party Odoo module, on Odoo.sh or on your server. Odoo installs at the same time `flexigotech_cloud`, the connection to FlexigoTech Cloud, and the apps it depends on: Invoicing.

5 The FlexigoTech Cloud trial

1. **Press Activate in the top bar**
   It appears as soon as you install the module. It opens the **Activate FlexigoTech Cloud** window, with the Standard plan and its 14 free days, no card needed.



- **Real Odoo 20 screenshot.** The activation window: read the list of data, tick the box and enter your email.

2 **Accept and enter your email**

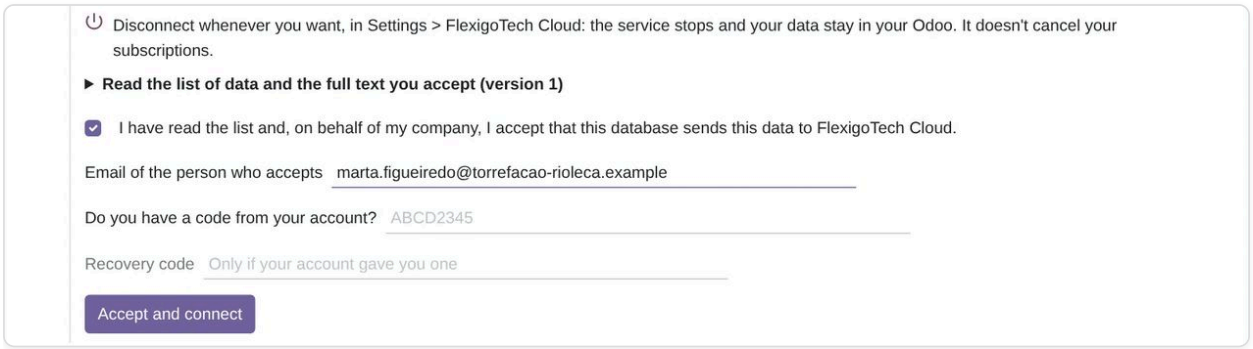
Tick "I have read the list and, on behalf of my company..." (it covers the subscription terms and the data processing agreement) and enter the **Email of the person who accepts**.

3 **Press Connect and start the trial**

Odoo registers the database with FlexigoTech Cloud and starts the module trial. If you want to do it later, **Later** closes the window.

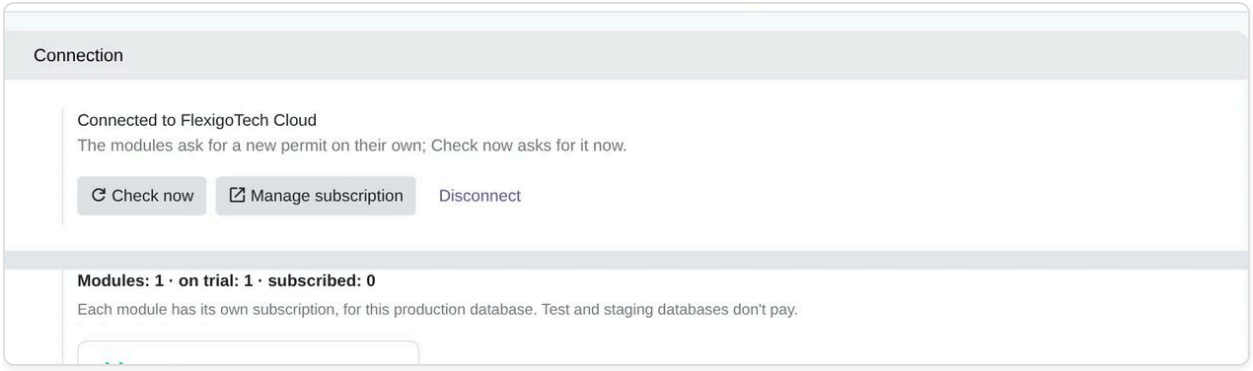
The same, from Settings

In **Settings › FlexigoTech Cloud** is the full list of what the database sends. Tick the box, enter the email and press **Accept and connect**. If you already have an account at app.flexigotech.com, the field **Do you have a code from your account?** links the database to it (the code is valid for 10 minutes).



- **Real Odoo 20 screenshot.** Settings › FlexigoTech Cloud, before connecting: the ticked box, the email and **Accept and connect**.

With the database connected, the **Modules** block shows each module with its status: **On trial** and the date it ends, **Subscribed**, etc. From there you choose the plan (Standard or Pro, monthly or yearly) and press **Subscribe**: payment is made on the Stripe page, outside Odoo.



- **Real Odoo 20 screenshot.** Settings › FlexigoTech Cloud with the database connected and the connector on trial.

Prices exclude VAT. If you do not subscribe when the trial ends, the service stops and nothing is charged; your data stays in your Odoo. **Check now** requests permission immediately (otherwise the module renews it by itself every 6 hours).

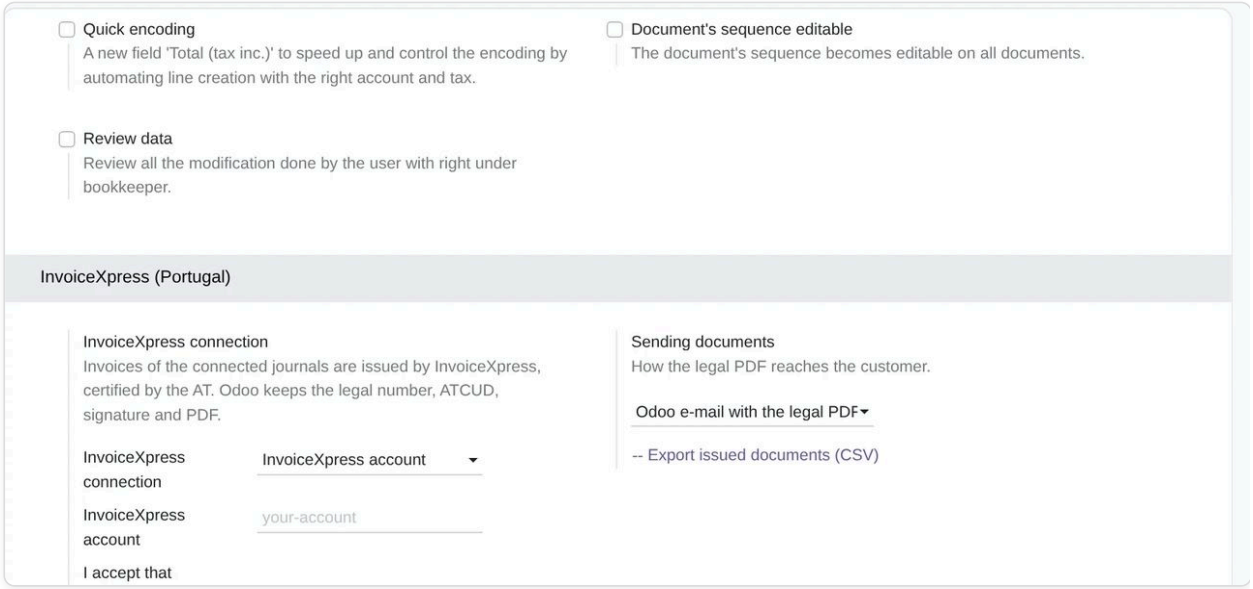
> A trial cannot be started on a neutralised copy (staging) or on a database with demo data: Settings says so with "This database is a neutralised copy or has demo data, so trials can't be started here.".

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6 Connecting your InvoiceXpress account step by step

1 Open the InvoiceXpress settings

In **Settings**, open the **Invoicing** section and scroll down to **InvoiceXpress (Portugal)**. Leave **InvoiceXpress connection** on **InvoiceXpress account**: the other option is the simulator, which issues nothing legal.



- **Real Odoo 20 screenshot.** The **InvoiceXpress (Portugal)** block in **Settings**, before connecting.

2 Enter the account name

Enter the name of your InvoiceXpress account, the part before .app.invoicexpress.com. It only accepts lowercase letters, digits and hyphens, and Odoo converts it to lowercase on saving. If you enter it any other way, Odoo warns you with "The InvoiceXpress account name may only have lowercase letters, digits and hyphens (the part before .app.invoicexpress.com).".

3 **Accept the consent**

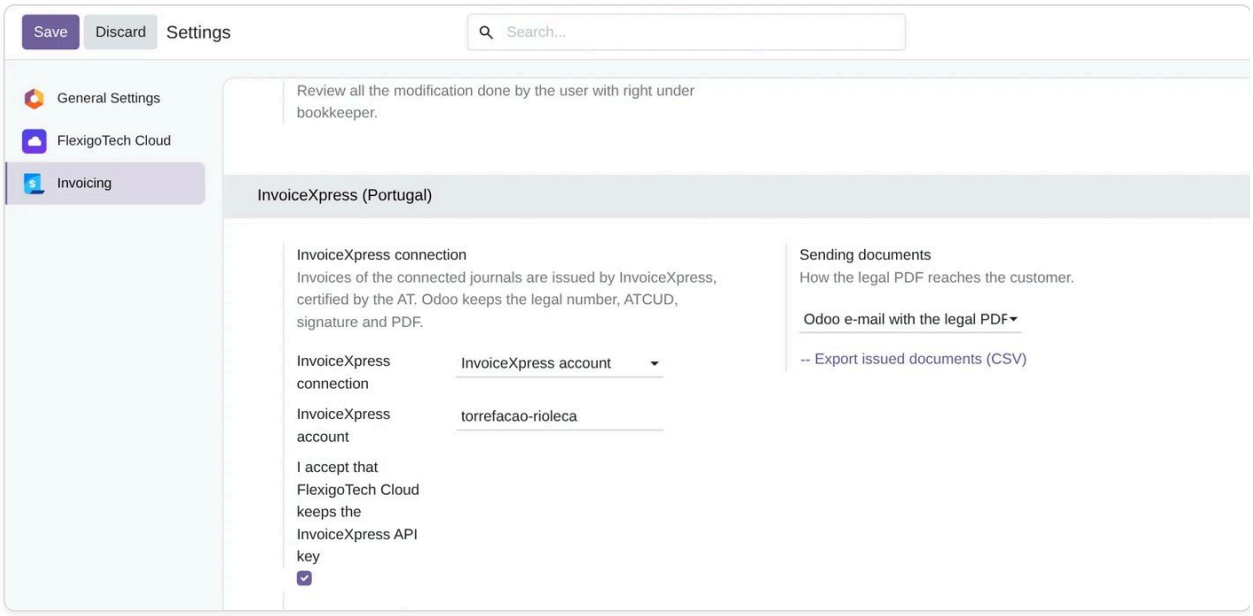
Tick **I accept that FlexigoTech Cloud keeps the InvoiceXpress API key**. The key is stored encrypted by FlexigoTech Cloud, not by your Odoo, and every call to InvoiceXpress goes through FlexigoTech Cloud. Without this box nothing is sent and Odoo warns you with "Before saving the InvoiceXpress API key, accept that FlexigoTech Cloud keeps it and that the calls to InvoiceXpress go through it. Nothing was sent.".

4 **Paste the API key and save**

Paste the InvoiceXpress API key and press **Save**. The key is sent to FlexigoTech Cloud only once. In your Odoo only the date it was saved, the account and the database that saved it remain.

5 **Test the connection**

Press **Test connection**: **InvoiceXpress account status** tells you how many series you have, how many are registered with the AT, and how many taxes. Then press **Fetch series** and **Fetch taxes** to bring into Odoo what you already have in InvoiceXpress; when fetching taxes, the connector matches the Odoo sales taxes that coincide in rate.



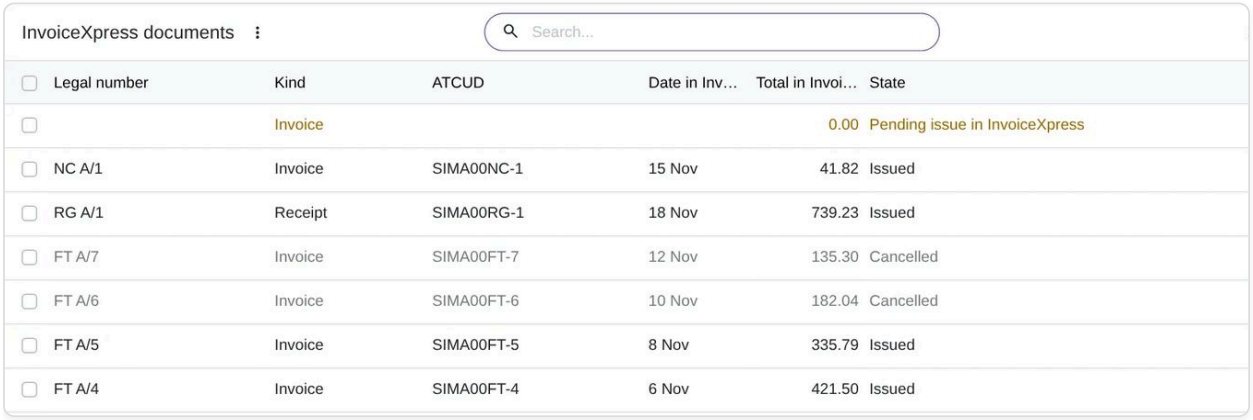
- **Real Odoo 20 screenshot.** The account already connected, with **API key saved on** and **InvoiceXpress account status**.

6 **Connect a sales journal**

In the sales journal, **InvoiceXpress** tab, switch on **Issue with InvoiceXpress** and choose the document type and the series. From then on, each invoice you confirm in that journal is issued in InvoiceXpress.

> Only an administrator can accept the consent or enter the credentials. If another user tries, Odoo replies "Only an administrator can change the InvoiceXpress connection." This database stores the key for a single InvoiceXpress account: if you change the account name, you must save the key again. A copy of the database sends nothing to InvoiceXpress until you save the key again in it.

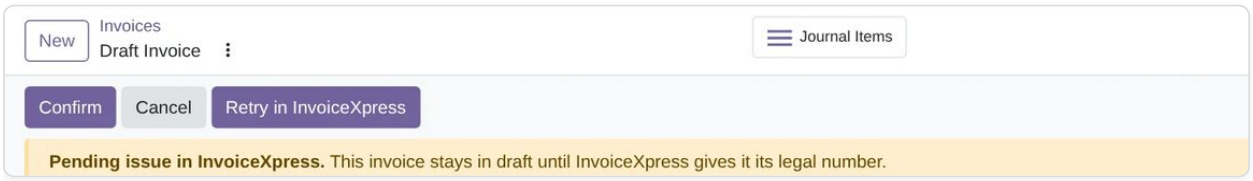
After connecting, the connector works on its own with six scheduled tasks, active from installation. One checks every minute which pending issues to retry, another every 2 minutes collects the missing legal PDFs and QR codes, another every 15 minutes issues the receipts for collections, another every hour follows the changes made in InvoiceXpress, another every day brings in the documents issued outside Odoo, and the last reports the connection status to FlexigoTech Cloud every hour. With **Export issued documents (CSV)** you get a local copy of what was issued, and with **Disconnect InvoiceXpress** you delete the key from FlexigoTech Cloud; documents already issued remain in InvoiceXpress and in Odoo.



- **Real Odoo 20 screenshot.** The **InvoiceXpress documents** list, with the legal number, the ATCUD and the status of each document.

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7 From the Odoo invoice to the legal InvoiceXpress invoice



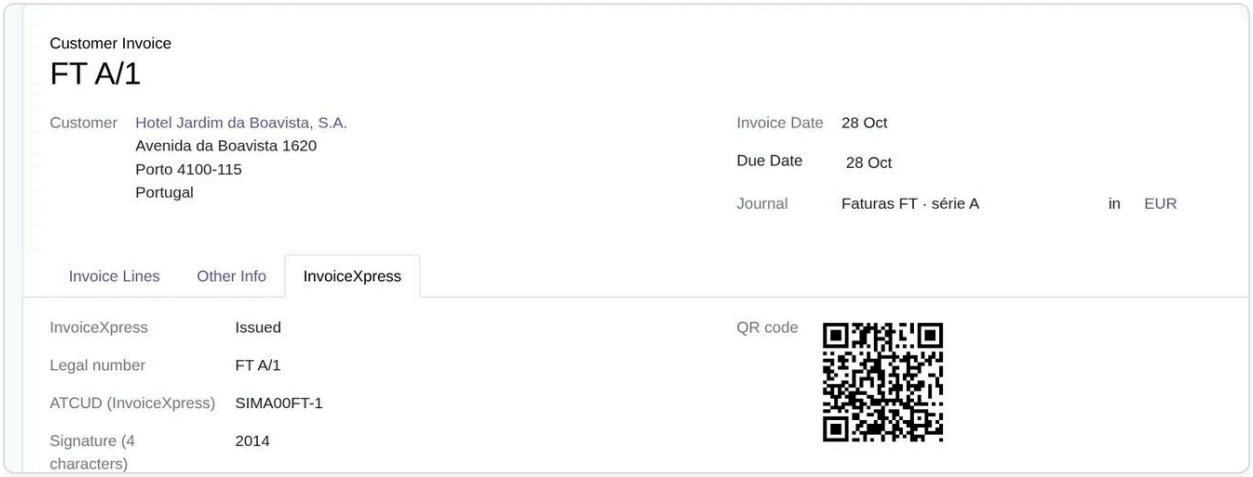
- **Real Odoo 20 screenshot.** A draft invoice with the **Pending issue in InvoiceXpress** warning and the **Retry in InvoiceXpress** button.

Where each piece of data comes from

- When you press **Confirm**, the invoice is issued in InvoiceXpress at that moment and Odoo sets the legal number as its name.
- If InvoiceXpress or FlexigoTech Cloud do not respond, the invoice stays in draft with the **Pending issue in InvoiceXpress** warning, and each invoice is retried automatically after 1, 5, 15 and 60 minutes and then every hour, for about 24 hours, always with the same document identifier. This is done by the task **InvoiceXpress: retry pending issues**.
- Right after issuing, the connector requests the legal PDF and the QR code. What InvoiceXpress does not yet have ready is collected by the task **InvoiceXpress: fetch legal PDFs and QR codes**, every 2 minutes. Confirming never fails because of them.

Invoice buttons

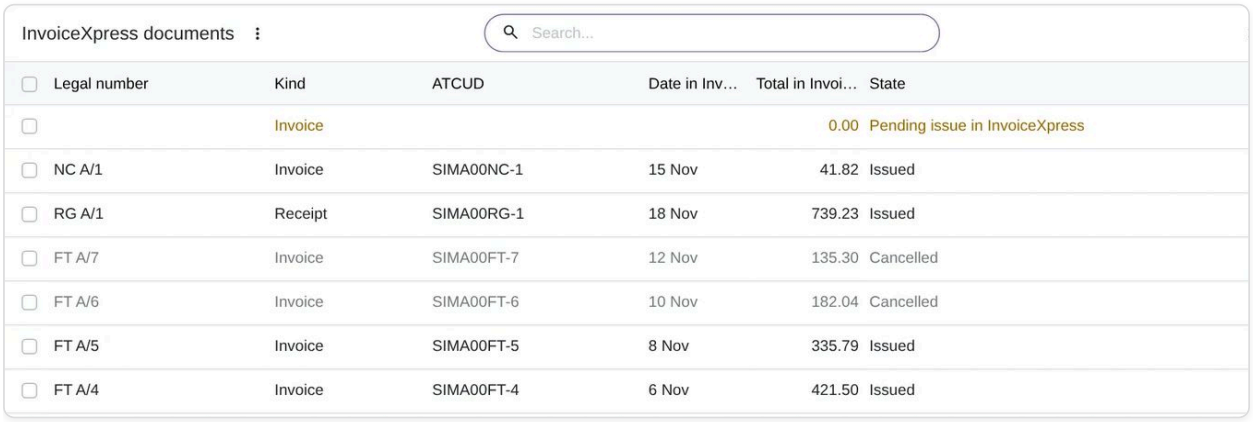
Retry in InvoiceXpress	Appears on a draft invoice with a pending issue, in draft in InvoiceXpress or with an error. It follows the same path as **Confirm** and never creates a second legal document.
Update InvoiceXpress status	Reads the document in InvoiceXpress and shows what has changed there. Appears when the invoice already has a legal number.
Send by InvoiceXpress	InvoiceXpress emails the legal PDF to the customer. Appears on confirmed invoices with a legal number.
Cancel in InvoiceXpress	Cancels both the legal document in InvoiceXpress and the Odoo journal entry at once. Appears on confirmed and issued invoices, and only for accounting managers.
Fetch the legal PDF	Downloads the legal PDF from the **InvoiceXpress** tab.



- **Real Odoo 20 screenshot.** An issued invoice, with its **Legal number**, its **ATCUD (InvoiceXpress)**, its **Signature (4 characters)** and its **QR code** in the **InvoiceXpress** tab.

Statuses

The **InvoiceXpress** field on the invoice and the document **State** use these values: **Pending issue in InvoiceXpress**, **Draft in InvoiceXpress**, **Issued**, **Issued and settled**, **Cancelled**, **Draft deleted** and **Error**. You can see them in **Invoicing › Customers › InvoiceXpress documents**.



- **Real Odoo 20 screenshot.** The **InvoiceXpress documents** list, with legal number, ATCUD and state.

1. **Confirm the invoice**

   Odoo sends it to InvoiceXpress.

2 **If there is no reply, wait**

The invoice stays in draft and is retried automatically.

3 **Check the number**

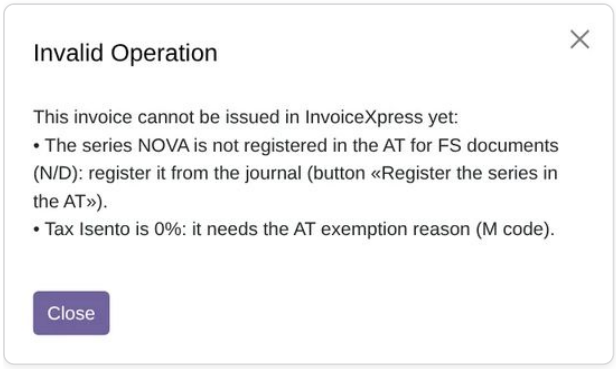
When it is issued, the invoice takes the legal number, the ATCUD and the 4-character signature.

> An invoice with a legal number does not go back to draft and cannot be deleted. To void it, use **Cancel in InvoiceXpress** or a credit note.

What the connector checks before issuing

Before sending anything, the connector checks the invoice without connecting to InvoiceXpress. If something would make InvoiceXpress or the AT reject it, "Invalid Operation" appears with the list of problems, and the invoice is not issued. What it checks:

- That the journal has an InvoiceXpress series and that this series is registered in the AT for the document type.
- That the invoice has a customer and, if Portuguese, a valid NIF.
- That each line carries a single tax, matched to one of InvoiceXpress.
- That each 0% tax has its **AT exemption reason**, and that all exempt lines carry the same reason, because InvoiceXpress allows one per document.
- That the line texts fit what InvoiceXpress stores: 60 characters in the name, and 200 characters and 20 lines in the description.
- That there are no negative prices or quantities. Credit notes and discounts exist for that.
- That the date is not earlier than that of the last document of the same type already issued, because the AT requires chronological order in each series.
- That a credit note has its original document: that it reverses an invoice issued with InvoiceXpress or carries the type, series and number of the original.



- **Real Odoo 20 screenshot.** The "Invalid Operation" warning with the problems that prevent issuing.

How double issuing is avoided

Each invoice is sent with its own identifier. If there is a dropped connection or a double click, the retry uses the same identifier and InvoiceXpress returns the original document instead of creating another. While an issue is in progress, another click or the automatic retry receive "This document is being sent to InvoiceXpress right now (another click or the automatic retry). Wait a few seconds and reload."

Totals that do not match

If the InvoiceXpress total does not match the Odoo one, nothing is issued: the InvoiceXpress draft is kept, the invoice stays in draft and the difference is shown line by line. An already issued document only becomes the invoice's legal number if it matches the invoice as it is now (customer, date, lines and total). If you touched the invoice afterwards, the error says it was already issued and that it was changed in Odoo.

When Odoo will not let you post

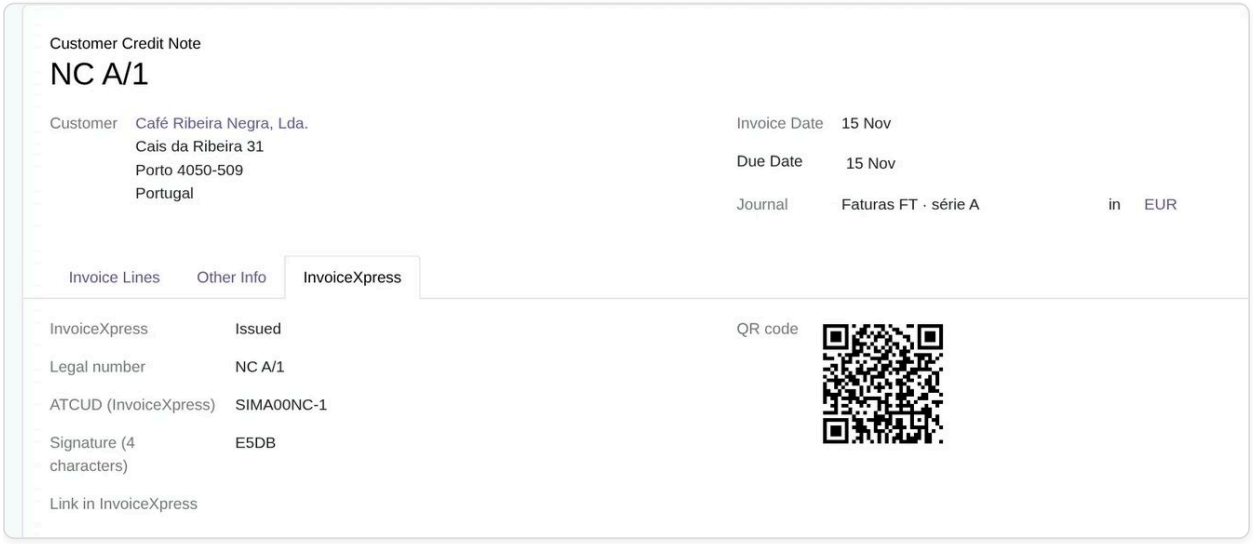
If the InvoiceXpress series of a connected journal already has legal numbers and the service is active, Odoo does not number anything in that journal that does not go through InvoiceXpress, such as a manually created entry: its sequence could produce a number that InvoiceXpress gives to its documents. When you post it, Odoo explains this and suggests doing it in another journal. With the journal unconnected or without a service, nothing is rejected, and the draft only shows a warning.

What you can do with an issued invoice

- It does not go back to draft: «... was issued in InvoiceXpress: a legal document does not go back to draft. Issue a credit note, or cancel it with «Cancel in InvoiceXpress».»
- It cannot be deleted: "... has a legal number from InvoiceXpress: a legal document keeps its entry in Odoo, so it is not deleted."
- Only the person who keeps the accounts cancels in InvoiceXpress, and only an already issued document. If it is cancelled in InvoiceXpress, Odoo warns you and does not cancel the entry on its own.
- An Odoo draft that is already issued in InvoiceXpress is neither deleted nor cancelled as a draft. Confirm it to obtain its legal number and cancel it afterwards.

> Today credit notes, debit notes, simplified invoices (FS) and invoice-receipts (FR) fail against live InvoiceXpress: InvoiceXpress rejects them because the connector sends them with the FT invoice series. This is fixed in the next version of the module.

To refund money or correct amounts, you issue a credit note from the invoice. In the demonstration, Café Ribeira Negra, Lda. returned two damaged bags, and the credit note NC A/1, for €41.82, reverses its invoice FT A/2: InvoiceXpress issues it with its legal number and its ATCUD, like an invoice.



- **Real Odoo 20 screenshot.** Credit note NC A/1 for Café Ribeira Negra, Lda., with its **Legal number** and its **ATCUD (InvoiceXpress)**.

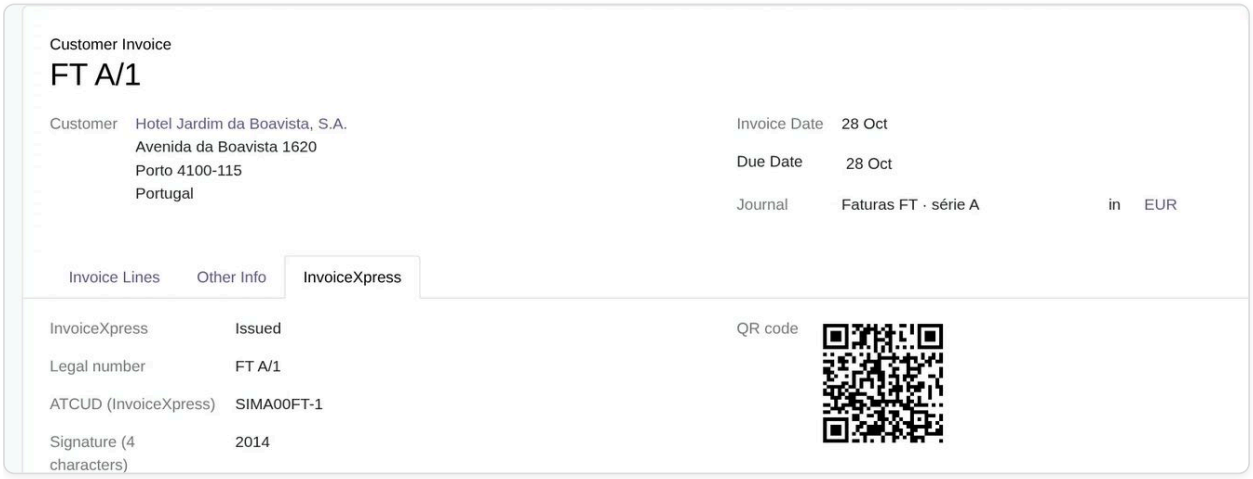
Send by email and fetch the PDF

Send by InvoiceXpress requires the document to be issued and the customer to have an email address: otherwise "... has no e-mail address." appears. If you request the legal PDF and InvoiceXpress is still generating it, "InvoiceXpress is still generating the legal PDF of .... Try again in a few seconds." appears.

Fields of the InvoiceXpress tab

InvoiceXpress	The status of the document in InvoiceXpress: **Pending issue in InvoiceXpress**, **Issued**, **Issued and settled**, **Cancelled** and the others.
Legal number	The number given by InvoiceXpress. It becomes the name of the invoice.
ATCUD (InvoiceXpress) and **Signature (4 characters)**	The document's unique code and the 4 characters of its signature.
Issued outside Odoo	It only appears on documents issued from the InvoiceXpress web or app.
Link in InvoiceXpress	The link to the document in InvoiceXpress, when there is one.
Fetch the legal PDF	Requests the legal PDF from InvoiceXpress straight away.
QR code	The document's QR code, as soon as it arrives.
Original document type, **Original series** and **Original number**	Only on a credit note that does not reverse an Odoo invoice: the original document as it appears printed.

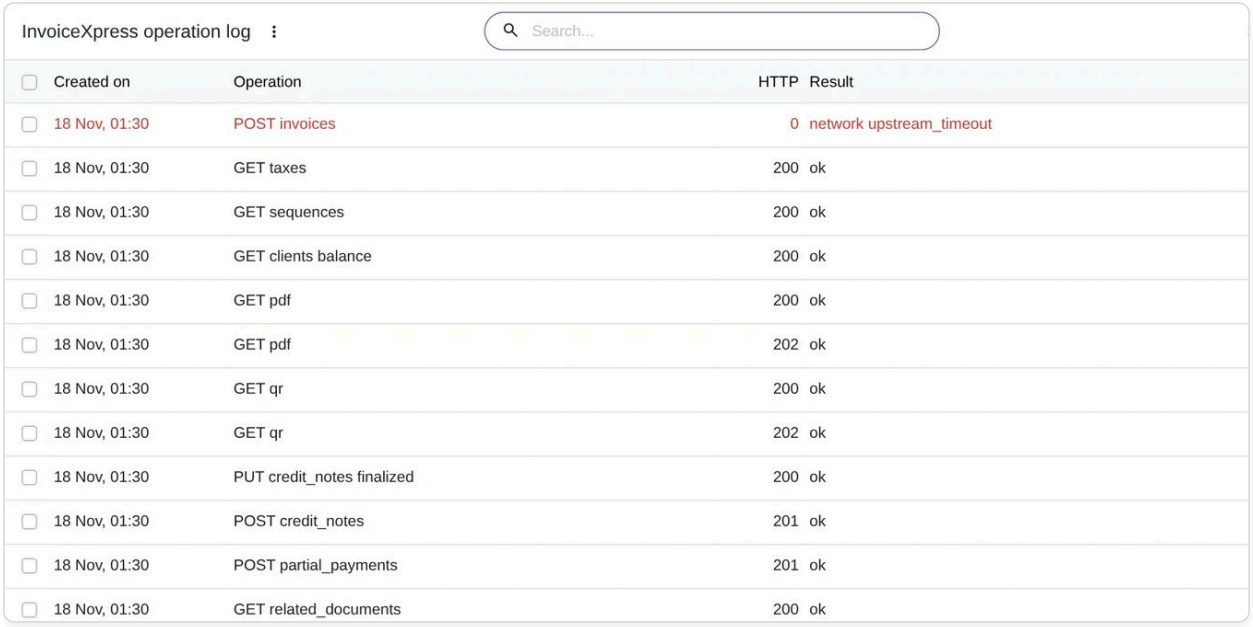
Below that, the same tab lists the related documents that InvoiceXpress holds for that invoice, such as its receipts and credit notes, with their legal number, ATCUD, amount and status.



- **Real Odoo 20 screenshot.** Invoice FT A/1 for Hotel Jardim da Boavista, S.A., issued, with its **Legal number**, its **ATCUD (InvoiceXpress)**, its **Signature (4 characters)** and its **QR code** in the **InvoiceXpress** tab.

End-to-end example

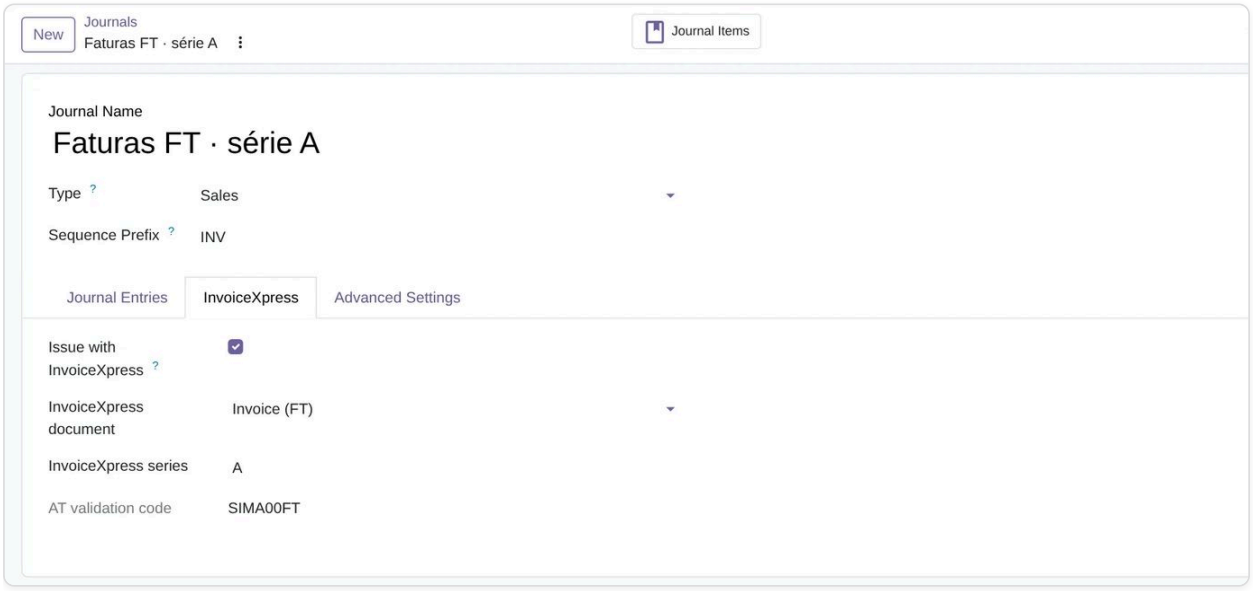
The invoice for Gelataria Foz Velha, Lda. is confirmed just when InvoiceXpress does not respond. It stays in draft with the warning **Pending issue in InvoiceXpress** and the reason: "FlexigoTech Cloud or InvoiceXpress did not answer in time (...). Nothing is lost: the connector tries again with the same document identifier, so InvoiceXpress never issues it twice." The operations log records the attempt, a POST invoices with no response and the result network upstream_timeout. When InvoiceXpress responds again, the retry completes the issue and the invoice takes its legal number, its ATCUD and its signature, like FT A/1 for Hotel Jardim da Boavista, S.A., for €739.23, with the ATCUD SIMA00FT-1.



- **Real Odoo 20 screenshot.** The operations log with the POST to invoices that got no response in time.

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8 Journals, series and document types



- **Real Odoo 20 screenshot.** InvoiceXpress tab of a sales journal, with series A and its validation code.

Where each piece of data comes from

Series come from InvoiceXpress with **Fetch series**, or you create them from Odoo with **New series** and **Create series**. You can see them in **Invoicing › Configuration › InvoiceXpress › Series**, which opens the **InvoiceXpress series** list; nothing is edited in that list. The journal's **AT validation code** comes from the series and the document type you choose in it.

In Portugal, each document series is reported to the AT before use, and the AT gives it a validation code that forms part of the ATCUD of each document (Decreto-Lei 28/2019, art. 35.º). InvoiceXpress does this reporting with the AT credentials you have configured there; from Odoo it is requested with **Register in the AT**.

The journal

Issue with InvoiceXpress	Tick box. When you confirm an invoice in this journal, it is issued in InvoiceXpress, which gives it the legal number, the ATCUD and the PDF.
InvoiceXpress document	The document type: **Invoice (FT)**, **Simplified invoice (FS)** or **Invoice-receipt (FR)**. It defaults to FT. The journal's credit notes come out as NC.
InvoiceXpress series	The series this journal issues with.
AT validation code	The AT code of that series for that document type. Odoo calculates it, and it shows N/D if the series is not registered.
Register the series in the AT	Journal button. Only accounting managers see it, and it is hidden while the journal has no series.

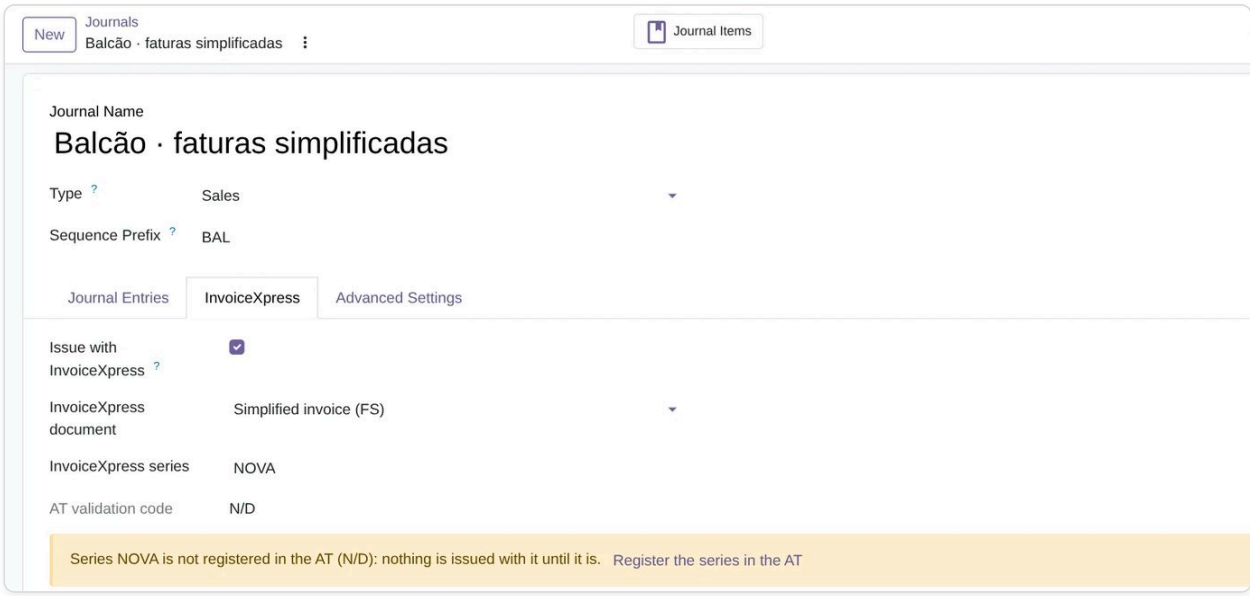
> Today credit notes, debit notes, simplified invoices (FS) and invoice-receipts (FR) fail against live InvoiceXpress: InvoiceXpress rejects them because the connector sends them with the FT invoice series. This is fixed in the next version of the module.

The series list

Registered in the AT	It ticks itself when the series has an AT validation code for all six document types: FT, FS, FR, NC, ND and RG.
Default in InvoiceXpress	Tick box showing the series that InvoiceXpress uses by default.
Register in the AT	Button on each series, for accounting managers. It is hidden once the series is registered.
Make default	Button on each series. It is hidden when it is already the default.

How to activate a journal

1. **Open the sales journal**
   Go to its **InvoiceXpress** tab.
2. **Turn on Issue with InvoiceXpress**
   Choose the **InvoiceXpress document** and the series in **InvoiceXpress series**.
3. **Check the AT validation code**
   If the series is not registered, click **Register the series in the AT**.



- **Real Odoo 20 screenshot.** A journal with the series NOVA not registered in the AT and the **Register the series in the AT** button.

> Only sales journals can issue with InvoiceXpress. With no series chosen, the register button replies "Choose the InvoiceXpress series of this journal first.". Registering a series or making it the default is for accounting managers, and creating one is for an administrator.

When a series can be used to issue

A series can be used to issue when it is registered in the AT. In the list, the **Registered in the AT** box ticks when the series has a validation code for all six document types. In the journal, the **AT validation code** of the chosen document type is what counts: if it is N/D, or if that of the credit notes is, the journal warns that nothing will be issued with that series until it is registered.

Validation codes by document

Each series stores one code per document type. The list shows the columns **Validation code FT**, **Validation code FS**, **Validation code FR**, **Validation code NC** and **Validation code RG**. **Validation code ND** also exists. The journal's code comes from the document type you have chosen in it.

Registration in the AT

Register in the AT asks InvoiceXpress to register the series. It needs the AT credentials to be configured in InvoiceXpress, not in Odoo. The button in the list is hidden once the series is registered. **Make default** is hidden when the series already is the default.

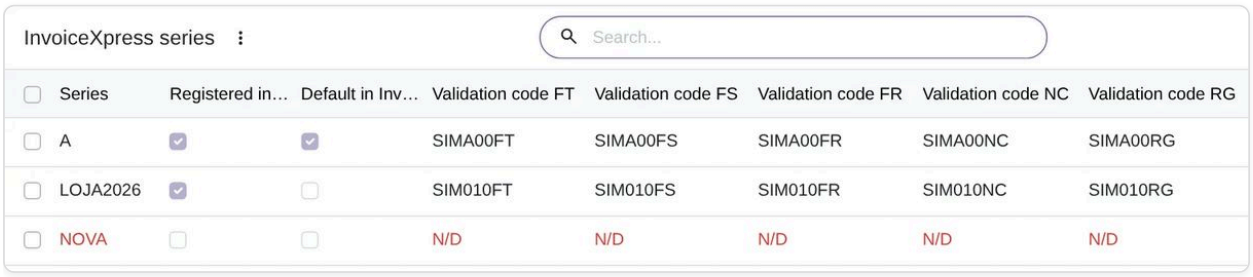
Who can and who cannot

- The register and default series buttons belong to the accounting managers group.
- Changing a series without being an accounting manager gives the error "Only accounting managers can change InvoiceXpress series.".
- A journal that is not a sales journal, with **Issue with InvoiceXpress** turned on, gives the error "Only sales journals can issue with InvoiceXpress.".

- Registering a series without choosing it first gives the error "Choose the InvoiceXpress series of this journal first.".
- Creating a series from **Settings** is for an administrator.

End-to-end example

The Balcão journal, for simplified invoices, has the series NOVA. In the series list, NOVA shows N/D in all the validation codes. When you open the journal, the **InvoiceXpress** tab says that the series NOVA is not registered in the AT for FS documents and that nothing will be issued with it. You click **Register the series in the AT**. Once the series is registered, the validation code stops being N/D and the warning disappears. Meanwhile, an invoice in that journal cannot be issued: the invoice's pre-check points you to that same button.

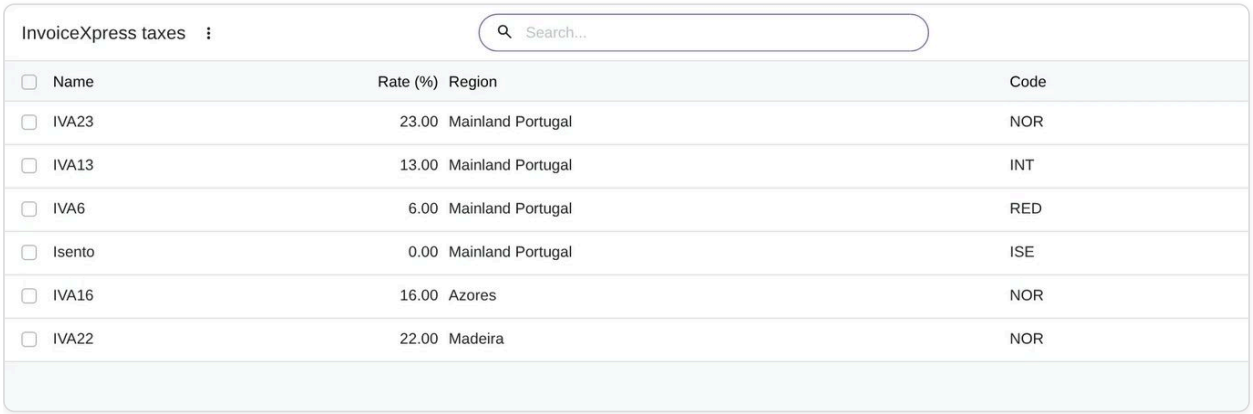


- **Real Odoo 20 screenshot.** The **InvoiceXpress series** list with series A and LOJA2026 with their codes, and series NOVA with no code.

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9 VAT and exemption reasons

Open **Invoicing › Configuration › InvoiceXpress › Taxes**. The **InvoiceXpress taxes** list opens, with the columns **Name**, **Rate (%)**, **Region**, **Code** and **Default tax**. Everything is read-only: the data comes from InvoiceXpress and is not edited here.



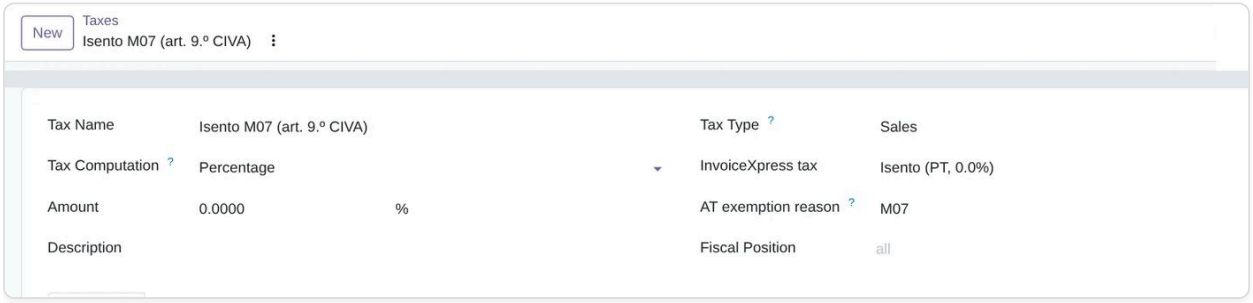
- **Real Odoo 20 screenshot.** The list of InvoiceXpress taxes with their rate, region and code.

When you fetch the taxes, the connector matches only the Odoo sales taxes that have no match yet, by rate and by region. If the name of the Odoo tax does not say Azores or Madeira, it treats it as mainland Portugal. A match made by hand is never overwritten.

On the Odoo tax

InvoiceXpress tax	The InvoiceXpress tax that this sales tax is paired with.

AT exemption reason	The M code for the exemption, from M01 to M46 or M99. It is needed on 0% taxes for documents issued with InvoiceXpress, and Odoo does not fill it in automatically.
Create in InvoiceXpress	Creates the tax in InvoiceXpress for Mainland Portugal, named IVA with its rate (IVA23, for example) or Isento if it is 0%. If InvoiceXpress already has one with that name and rate, it pairs with it without creating another. It only appears on sales taxes that do not yet have an **InvoiceXpress tax**.



- **Real Odoo 20 screenshot.** A sales tax with its **InvoiceXpress tax** and its **AT exemption reason**.

Steps

1. **Open the tax list**
   You see the InvoiceXpress taxes, with their rate, region and code.

2. **Open an Odoo sales tax**
   Check that it has an **InvoiceXpress tax**. If it is 0%, choose the **AT exemption reason**.

3. **If it has no pair, click Create in InvoiceXpress**
   The tax is created in InvoiceXpress with the name IVA and its rate, or it is paired with the existing one with that name.

> Only accounting managers can create taxes in InvoiceXpress. Only percentage taxes can be created: with any other calculation type you get the error "Only percentage taxes exist in InvoiceXpress (...).".

What the list contains and how it is filled

The **InvoiceXpress taxes** list shows, for each tax, its **Name**, the **Rate (%)**, the **Region** (which can be **Mainland Portugal**, **Azores**, **Madeira** or **Unknown**), the **Code** and whether it is the **Default tax**. Each tax belongs to a **Company**. None of these fields are edited from Odoo.

Pairing with your sales taxes

The connector looks, among your unpaired sales taxes, for the one that matches in rate and region. The region of the Odoo tax is not known, so Mainland Portugal is assumed unless the name says Azores or Madeira. A pairing you have made by hand is never overwritten. If a sales tax remains unpaired, **Create in InvoiceXpress** creates it there for Mainland Portugal, with the name IVA and its rate, or Isento if it is 0%.

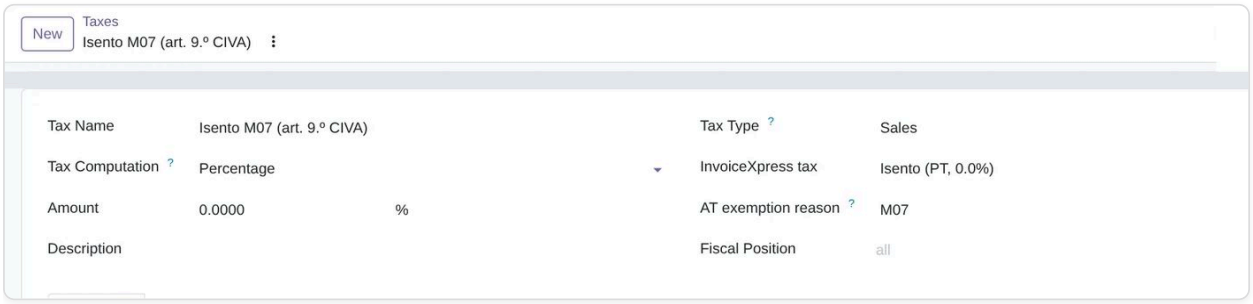
When it will not let you create the tax

- The **Create in InvoiceXpress** button is hidden if the tax already has an **InvoiceXpress tax** or if it is not a sales tax.

- If you are not an accounting manager, you see "Only accounting managers can create taxes in InvoiceXpress."
- If the tax is not a percentage, you get «Only percentage taxes exist in InvoiceXpress (...).».

AT exemption reason

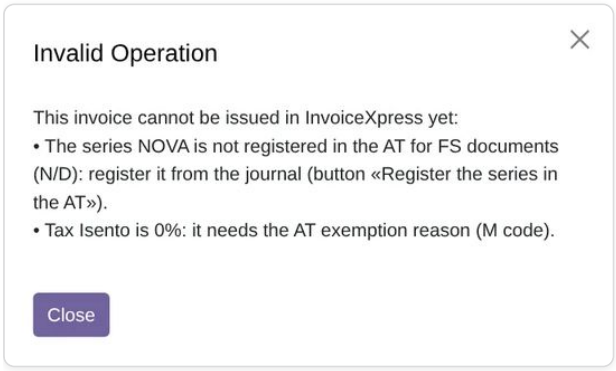
The **AT exemption reason** is a selection field on the Odoo tax. It is required on 0% taxes for documents issued with InvoiceXpress. Odoo does not fill it in automatically when pairing: you choose it, from M01 to M46 or M99. In the figure, the 0% sales tax has it filled in and is paired with an **InvoiceXpress tax**.



- **Real Odoo 20 screenshot.** An exempt tax with its exemption reason and its InvoiceXpress tax.

When the reason is missing

If you issue an invoice with a 0 % tax and no exemption reason, Odoo does not let you issue it. You get the warning «Invalid Operation» with the message «Tax … is 0%: it needs the AT exemption reason (M code).», with the name of the tax; in the figure, Isento.



- **Real Odoo 20 screenshot.** The «Invalid Operation» warning with the Isento 0 % tax and no exemption reason.

End-to-end example

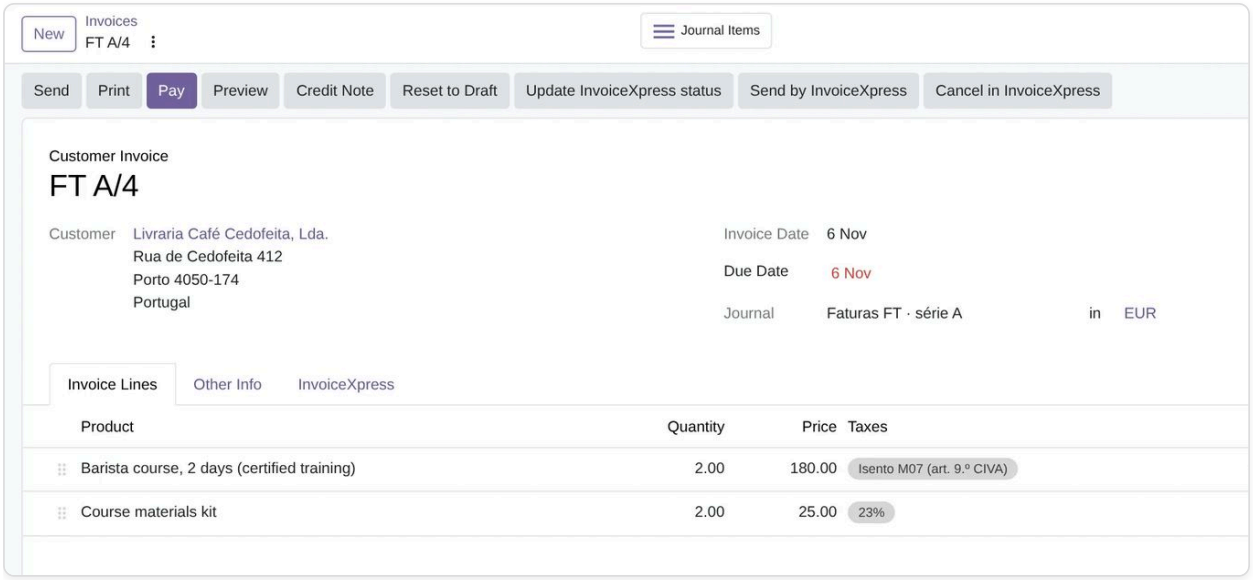
1. **Check the imported taxes**
   The list has six: IVA23, IVA13 and IVA6 for Mainland Portugal, Isento at 0%, IVA16 for Azores and IVA22 for Madeira.

2. **Open the 0% sales tax**
   On the Odoo tax that corresponds to the exemption, check that it points to Isento in **InvoiceXpress tax**.

3. **Choose the reason**
   In **AT exemption reason** enter the code of the exemption you apply. In the demo, the Isento M07 tax (art. 9 CIVA) has M07, and the invoice for Livraria Café Cedofeita, Lda. comes out with its exempt line.

4 **Issue the invoice**

With the reason set, the invoice is no longer blocked by the 0% tax.



- **Real Odoo 20 screenshot.** The invoice for Livraria Café Cedofeita, Lda., with its course exempt under reason M07.

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10 Customers: Odoo and InvoiceXpress contacts



- **Real Odoo 20 screenshot.** The **Link existing contacts** wizard, with the **Link** button.

The code sent with each document is the contact's internal reference. If it has no reference, the connector uses its own ODOO- prefix followed by the contact's internal number (ODOO-42, for example). Once used, the code is stored and does not change: if you later rename the reference, no second customer is created in InvoiceXpress.

Customers that already exist in InvoiceXpress are brought in with the wizard at **Invoicing › Configuration › InvoiceXpress › Link existing contacts**. It reads all the customers and links them to the Odoo contact that has the same code or the same tax ID. If nothing else matches, it uses the same name, but only when that name is unique in Odoo. The result is written in the **Result** field of the wizard.

When you change tax data of a contact that is already in InvoiceXpress in Odoo, the connector also tries to update the customer there. If it cannot, it leaves the message "Not updated in InvoiceXpress: ..." on the contact, with the reason.

On the contact

Send to InvoiceXpress	Creates the customer in InvoiceXpress or updates it if it is already there, searching for it by its code.
Data in InvoiceXpress	Opens the customer's data in InvoiceXpress. It only appears when the contact is already in InvoiceXpress.
Balance in InvoiceXpress	Reads the customer's balance in InvoiceXpress to compare it with Odoo's. It only appears when the contact is already in InvoiceXpress.
InvoiceXpress code	The fixed reference of the contact in InvoiceXpress. Read only.
InvoiceXpress client id	The customer identifier in InvoiceXpress. Read only.
Balance in InvoiceXpress and **Balance read on**	The last balance read and when it was read. Read only.

Steps

1. **Open the wizard**
   Go to **Invoicing › Configuration › InvoiceXpress › Link existing contacts**.
2. **Click Link**
   The connector goes through the InvoiceXpress customers and pairs them with your contacts.
3. **Read the Result**
   It shows what has been linked.

> Only invoicing users can link contacts and send or check them in InvoiceXpress. To read the data or the balance, the contact must already be in InvoiceXpress: if not, Odoo warns you with «This contact is not in InvoiceXpress yet.»

How it is decided which contact each customer matches

The wizard tries three criteria in order: the same code, the same tax ID and, only if nothing else matches, the same name. The name only counts when it is unique in Odoo. If two contacts have the same name, the name is not used for matching, because in InvoiceXpress the customer name is unique and two contacts with the same name would clash.

The fixed code

Each document travels with the customer code. It is the contact's internal reference and, if it has none, a connector-specific one: ODOO- followed by the contact's internal number (ODOO-42, for example). Once used, it is stored. That is why changing the reference later does not create a second customer in InvoiceXpress. If you have two contacts with the same name in Odoo, each travels with its own code and they do not clash.

What Send to InvoiceXpress does

The button creates the customer in InvoiceXpress. If it already exists, it looks it up by code and updates it. It is on the **InvoiceXpress** tab of the contact.

When you change tax data

If you change the name, tax ID, address or email of a contact already in InvoiceXpress, the connector sends the update on its own. It only does so for companies or for contacts without a parent company, not for the contact persons of a company. If InvoiceXpress rejects the change, the contact receives the message "Not updated in InvoiceXpress: ...", with the reason. The next document will carry the same data regardless. A connection in copy mode, in test mode or unconfigured skips the update without leaving a message.

What you cannot do

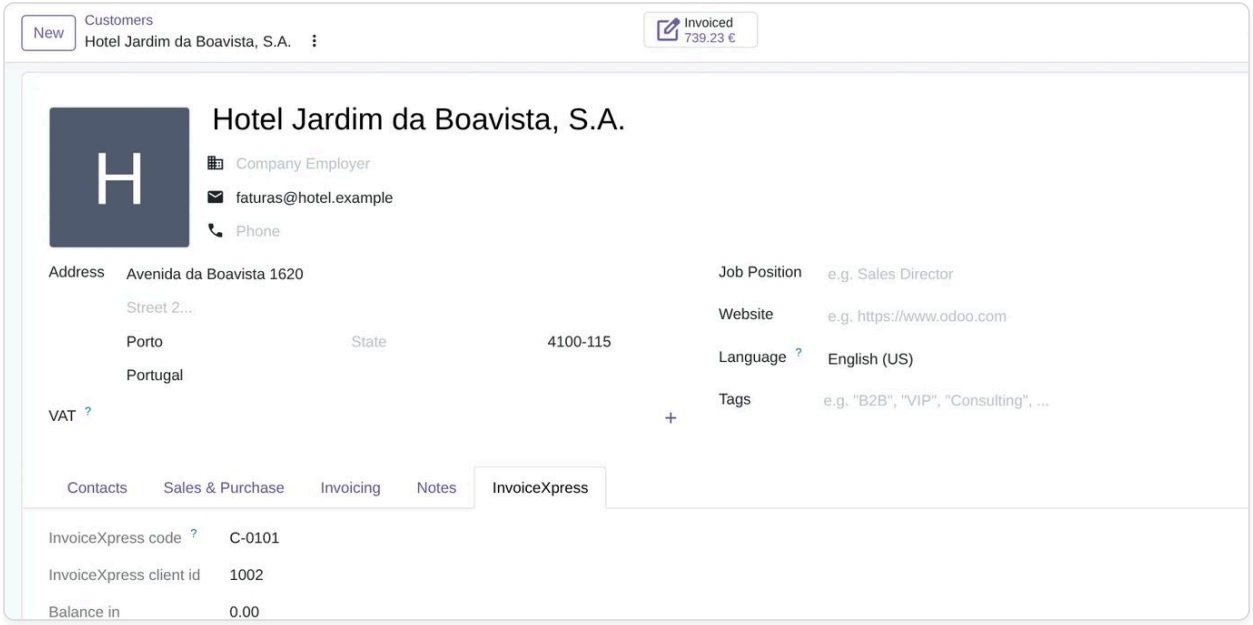
ACTION	WHEN IT IS NOT ALLOWED	MESSAGE
Link	If you are not an invoicing user	"Only invoicing users can link contacts."
Data in InvoiceXpress and **Balance in InvoiceXpress**	If the contact is not yet in InvoiceXpress. Both buttons are hidden in that case.	«This contact is not in InvoiceXpress yet.»
Contact actions	If you are not an invoicing user	"Only invoicing users can do this."

The contact fields

InvoiceXpress code	Fixed reference of the contact in InvoiceXpress.
InvoiceXpress client id	When filled in, the contact is already in InvoiceXpress and the data and balance buttons appear.
Balance in InvoiceXpress	The balance read from InvoiceXpress. Compare it with Odoo's.
Balance read on	The date and time of that reading.

End-to-end example

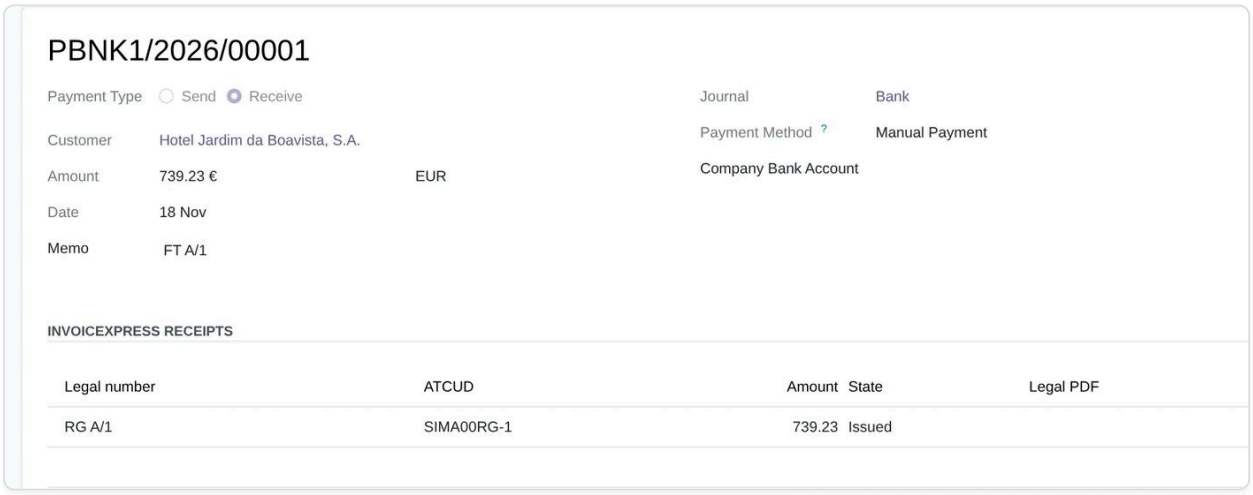
The Hotel Jardim da Boavista, S.A. has the internal reference C-0101 in Odoo. You click **Send to InvoiceXpress** on its form: the connector looks in InvoiceXpress for a client with the code C-0101, does not find one and creates it. From then on the contact stores the **InvoiceXpress code** C-0101 and its **InvoiceXpress client id**, and the **Data in InvoiceXpress** and **Balance in InvoiceXpress** buttons appear. Its invoice FT A/1 travels with that same code, so InvoiceXpress does not create a second client.



- **Real Odoo 20 screenshot.** The **InvoiceXpress** tab for Hotel Jardim da Boavista, S.A., with its **InvoiceXpress code** and its **InvoiceXpress client id**.

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11 Payments and receipts



- **Real Odoo 20 screenshot.** The payment of invoice FT A/1 with its receipt in **InvoiceXpress receipts**.

Where the receipts come from

- The scheduled action **InvoiceXpress: receipts of payments** runs every 15 minutes and issues any receipts that are missing.
- When you reconcile or unreconcile a payment, the connector notifies InvoiceXpress once Odoo has saved the change.

What you see on the payment

InvoiceXpress receipts	Form group on the payment with the receipts that InvoiceXpress has issued for it.
Update receipts in InvoiceXpress	Button that synchronises the receipts of this payment without waiting for the scheduled action.

Statuses

When the receipts cover the whole invoice, InvoiceXpress treats it as settled. Odoo picks this up on the next run of **InvoiceXpress: follow changes made in InvoiceXpress**, every hour, or when you click **Update InvoiceXpress status**, and the document changes from **Issued** to **Issued and settled**.

The receipt carries the InvoiceXpress payment mechanism (**Bank transfer (TB)**, **Multibanco reference (MB)** or **Credit card (CC)**) if you have set it on the bank journal, in the **InvoiceXpress payment mechanism** column of its inbound payment methods.

How to use it

1. **Register the payment**
   Do it from the invoice with **Pay** and reconcile it with the invoice.
2. **Wait for the receipt**
   The connector issues it when you reconcile or, at the latest, on the next run of the task that runs every 15 minutes.
3. **Force the sync if needed**
   Open the payment and click **Update receipts in InvoiceXpress**.

> The **Update receipts in InvoiceXpress** button can only be used by invoicing users; for everyone else it shows "Only invoicing users can do this.".

The receipt follows the reconciliation

In InvoiceXpress the receipt always comes after the Odoo reconciliation, never the other way round. The connector only calls InvoiceXpress once Odoo has finished saving the reconciliation or its cancellation. The same check is repeated in the task **InvoiceXpress: receipts of payments**, which runs every 15 minutes.

What it compares and what it does in each case

SITUATION	WHAT THE CONNECTOR DOES
There is a reconciliation between the invoice and a payment, and there is no receipt	Issues the receipt.
There is a receipt in InvoiceXpress and its reconciliation no longer exists	Cancels the receipt.
The InvoiceXpress receipts already match the reconciliations	Does nothing.

If a call was applied but the response was lost

Receipts do not carry their own identifier that Odoo can resend. That is why, before creating one, the connector looks among the invoice's related documents for a receipt with the same amount and the same date that is not yet linked. If it finds one, it links it instead of issuing another, so a lost response does not generate a duplicate receipt.

The other tasks involved

InvoiceXpress: retry pending issues	Every minute. Retries the invoices left in **Pending issue in InvoiceXpress**.
InvoiceXpress: fetch legal PDFs and QR codes	Every 2 minutes. Downloads the legal PDF.
InvoiceXpress: follow changes made in InvoiceXpress	Every hour. Picks up changes made directly in InvoiceXpress.

Conditions

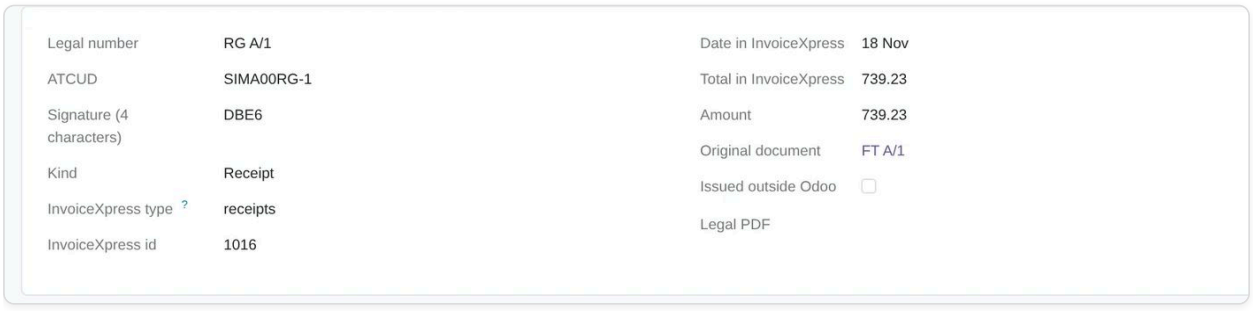
- The **Update receipts in InvoiceXpress** button only works for invoicing users; otherwise it shows "Only invoicing users can do this.".
- The InvoiceXpress payment mechanism (**Bank transfer (TB)**, **Multibanco reference (MB)** or **Credit card (CC)**) is chosen on the bank or cash journal, in the **InvoiceXpress payment mechanism** column of its inbound payment methods, and travels with each receipt of that method. If it is empty, nothing is sent.

Payment fields

InvoiceXpress receipts	The group with the InvoiceXpress receipts of the collection: legal number, ATCUD, amount, state and PDF. At the top, a button with the same name shows how many there are and opens them.

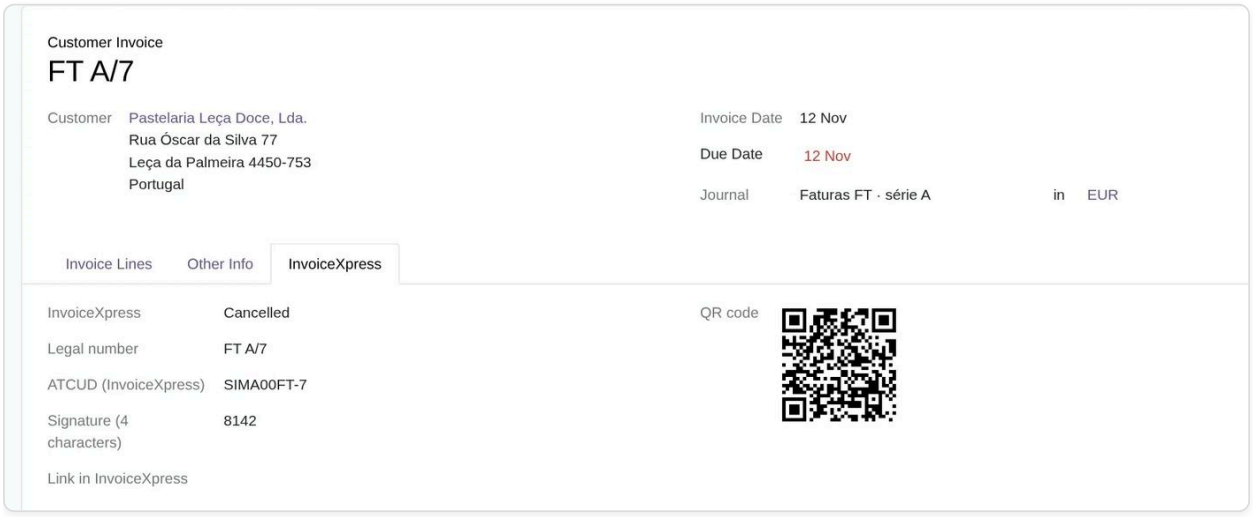
An end-to-end example

Invoice FT A/1 from Hotel Jardim da Boavista, S.A., for €739.23, is **Issued**. You register the collection from the invoice with **Pay**, and it is reconciled with it. On saving, the connector issues receipt RG A/1 in InvoiceXpress for €739.23, which appears in the **InvoiceXpress receipts** of the collection and in **InvoiceXpress documents** with the **Receipts** filter. As the receipt covers the whole invoice, InvoiceXpress treats it as settled, and Odoo moves it to **Issued and settled** on the next status read.



- **Real Odoo 20 screenshot.** Receipt RG A/1 in **InvoiceXpress documents**, with its **Legal number**, its **ATCUD** and its **Original document**.

12 Cancelling documents and following changes in InvoiceXpress



- **Real Odoo 20 screenshot.** Invoice FT A/7, cancelled from Odoo with its reason, keeps its **Legal number**.

The status of each document is updated automatically by the scheduled task **InvoiceXpress: follow changes made in InvoiceXpress**, which runs every hour. You can also request it on the spot with **Update InvoiceXpress status**.

If someone cancels the document on the InvoiceXpress website, Odoo does not cancel the entry on its own. The invoice shows the warning «This document was cancelled in InvoiceXpress. Cancel the Odoo entry or issue a credit note.», leaves a message with the reason and a **Cancelled in InvoiceXpress** activity for the invoice's salesperson.

Update InvoiceXpress status	Reads the document in InvoiceXpress and shows what has changed there. It is hidden if the invoice has no legal number, or if it was issued outside Odoo and has no status in InvoiceXpress.
Cancel in InvoiceXpress	Cancels both the legal document in InvoiceXpress and the Odoo entry at once. Only accounting managers can see it, and only with the invoice posted and the document in **Issued** or **Issued and settled**.
Fetch the legal PDF	It is in the **InvoiceXpress** tab and is hidden if the invoice has no legal number.

Document statuses

- **Pending issue in InvoiceXpress**: the document does not yet have a legal number.
- **Draft in InvoiceXpress**: it exists in InvoiceXpress as a draft.
- **Issued** and **Issued and settled**: it already has a legal number.
- **Cancelled**: it was voided in InvoiceXpress.
- **Draft deleted**: the draft was deleted in InvoiceXpress.
- **Error**: the last attempt failed; the reason appears in **Last error**.

1. **Open the issued invoice**
   It must be posted and with the document issued.

2. **Click Cancel in InvoiceXpress**
   A window opens with the **Reason** and an **Advice**.

3. **Write the reason and click Cancel the legal document**
   InvoiceXpress cancels the document and Odoo cancels the invoice.

> Without a reason it is not cancelled: you get «The reason is required.». If you are not an accounting manager, you get «Only accounting managers can cancel legal documents.». A legal document does not go back to draft and is not deleted: it keeps its entry in Odoo.

Document statuses

STATUS	WHAT IT MEANS
Pending issue in InvoiceXpress	Odoo requested the issue and there is no legal number yet. The invoice remains in draft and the task **InvoiceXpress: retry pending issues** retries it every minute.
Draft in InvoiceXpress	The document exists in InvoiceXpress as a draft, without a legal number.
Issued	It has a legal number, ATCUD and signature.
Issued and settled	Issued and with the collections registered.
Cancelled	Voided in InvoiceXpress. The **Cancel Reason** is kept on the document.
Draft deleted	The draft was deleted in InvoiceXpress; the invoice can be issued again.
Error	The last attempt failed. **Last error**, **Last error on** and **Next Attempt** say what happened and when it will be retried.

Cancellation rules

- **Cancel in InvoiceXpress** is only visible to accounting managers, with the invoice posted, with a legal number and with the document in **Issued** or **Issued and settled**.
- If you are not one, you get «Only accounting managers can cancel legal documents.».
- A document that has not been issued gives «Only an issued document can be cancelled in InvoiceXpress.».
- The **Reason** is required, it is kept in InvoiceXpress and it is reported to the AT. If empty, it gives "The reason is required.".
- A legal document does not go back to draft: «... was issued in InvoiceXpress: a legal document does not go back to draft. Issue a credit note, or cancel it with «Cancel in InvoiceXpress».».
- Nor is it deleted: it keeps its entry in Odoo, even if it was cancelled in InvoiceXpress.

If someone cancels in InvoiceXpress

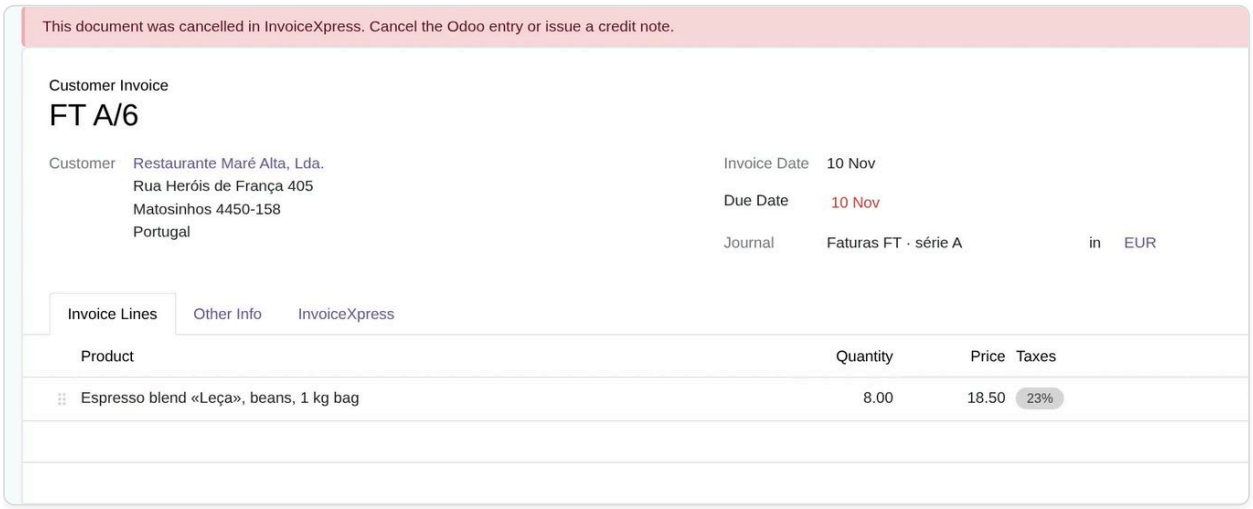
The hourly task reads the status of documents from the last 60 days. If someone cancels one there, Odoo warns you on the invoice, leaves a message with the reason and an activity **Cancelled in InvoiceXpress**, but does not cancel the entry on its own: you void it yourself or issue a credit note.

Record fields

InvoiceXpress documents	List at **Invoicing › Customers › InvoiceXpress documents**, with filters such as **Pending or with errors**, **Issued** and **Receipts**.
Original document	The document from which another one derives, for example a credit note.
Legal number, ATCUD, Signature (4 characters)	The legal data from InvoiceXpress.
Legal PDF and QR code	They are downloaded automatically by the task **InvoiceXpress: fetch legal PDFs and QR codes**, every 2 minutes.
Open in Odoo and Open in InvoiceXpress	They open the invoice and the document. The second is hidden if there is no link.

Example

Invoice FT A/7 from Pastelaria Leça Doce, Lda. was made to the wrong customer. An accounting manager opens it, clicks **Cancel in InvoiceXpress**, writes the reason and confirms with **Cancel the legal document**. InvoiceXpress voids the document and Odoo cancels the entry, which keeps its legal number. Another one, invoice FT A/6 from Restaurante Maré Alta, Lda., was voided on the InvoiceXpress website as a duplicate: when reading its status, Odoo marks it as **Cancelled** and shows the red warning, and its entry stays posted until someone cancels it or issues a credit note.



- **Real Odoo 20 screenshot.** Invoice FT A/6, cancelled on the InvoiceXpress website: Odoo shows the red warning and the journal entry remains posted.

13 Documents issued outside Odoo



- **Real Odoo 20 screenshot.** The wizard **Fetch from InvoiceXpress** with the field **Issued since** and the button **Fetch**.

Where each piece of data comes from

The scheduled task **InvoiceXpress: bring documents issued outside Odoo** runs every day and is active. You can also bring them manually from **Invoicing › Configuration › InvoiceXpress › Fetch from InvoiceXpress**. There you choose the company, indicate from which date you want to bring documents in **Issued since** and click **Fetch**. By default the date is 31 days ago. The **Result** field tells you what happened. The task brings what was issued since its last run, and only if the company has some connected journal.

> Only accounting managers can bring in documents. If you are not one, Odoo warns you with «Only accounting managers can bring documents from InvoiceXpress.».

Record buttons

Open in Odoo	Opens the Odoo invoice that corresponds to the document.
Open in InvoiceXpress	Opens the document in InvoiceXpress. It is only visible if InvoiceXpress gave a link for that document.

Document statuses

The **State** field of the record can be **Pending issue in InvoiceXpress**, **Draft in InvoiceXpress**, **Issued**, **Issued and settled**, **Cancelled**, **Draft deleted** or **Error**. Documents brought in from outside have the **Issued outside Odoo** checkbox ticked.

How to do it by hand

1. **Open the wizard**
   Go to **Invoicing › Configuration › InvoiceXpress › Fetch from InvoiceXpress**.
2. **Choose the date**
   Fill in **Issued since** with the day from which you want to bring in documents.
3. **Fetch the documents**
   Click **Fetch**. The result appears in **Result**.
4. **Check the list**

Look at the documents in **InvoiceXpress documents** with the filter **Issued outside Odoo**.

> Documents brought in from outside are never sent back to InvoiceXpress.

Document statuses

STATUS	WHAT IT MEANS
Pending issue in InvoiceXpress	The document is waiting to be issued. If there is a communication failure, the connector retries it without issuing it twice.
Draft in InvoiceXpress	The document exists in InvoiceXpress as a draft.
Issued	It has its legal number, the ATCUD and the 4-character signature.
Issued and settled	Issued, with payment already closed.
Cancelled	The document was cancelled. The reason is recorded in **Cancel Reason**.
Draft deleted	The draft was deleted in InvoiceXpress.
Error	Something has failed. The details are in **Last error**, with its **Last error on** date.

Rules and conditions

- Only accounting managers can bring in documents. Other users see «Only accounting managers can bring documents from InvoiceXpress.».
- **Open in InvoiceXpress** only works if InvoiceXpress gave a valid link. If not, Odoo shows «InvoiceXpress did not give a link for this document.».
- If another click or the automatic retry is currently sending the same document, Odoo warns with "This document is being sent to InvoiceXpress right now (another click or the automatic retry). Wait a few seconds and reload.".

Record fields

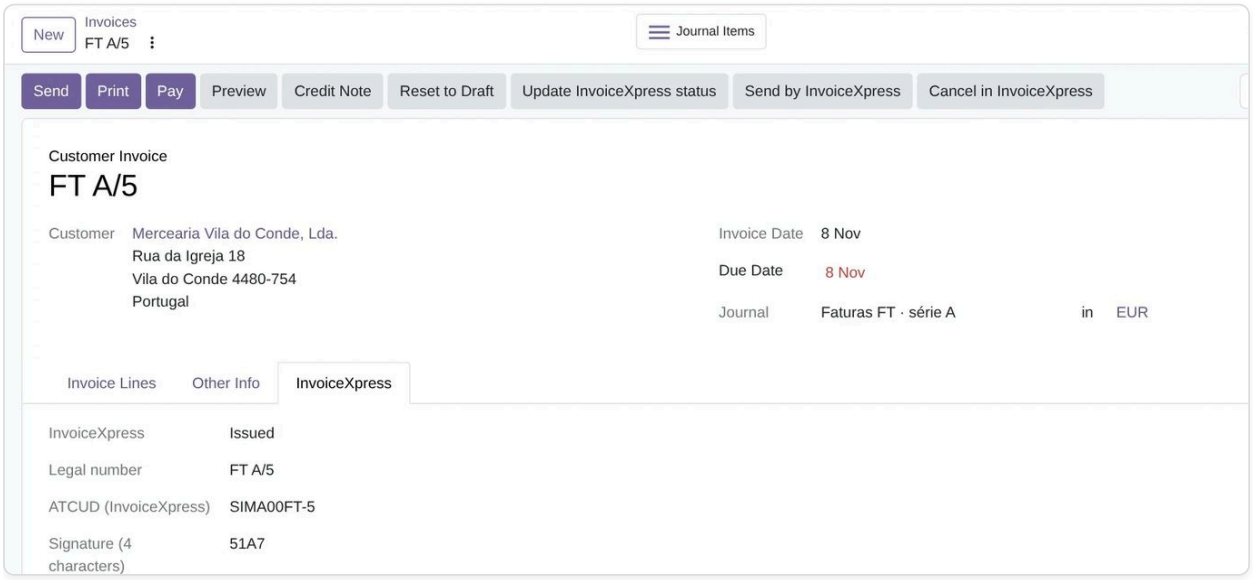
Kind	Invoice or receipt.
InvoiceXpress type	The document type in InvoiceXpress.
InvoiceXpress id	The document identifier in InvoiceXpress.
Date in InvoiceXpress and **Total in InvoiceXpress**	The date and total as InvoiceXpress holds them.
Amount	The amount of the document.
Original document	The document this one comes from, if any.
Simulator	Marks documents issued in the offline simulator: they are not legal documents.
Legal PDF and **QR code**	The legal PDF and QR code of the document, once they have been fetched.
Next Attempt	When a failed send will be attempted again.

How the data gets completed

Two scheduled tasks complete the document. **InvoiceXpress: fetch legal PDFs and QR codes** runs every 2 minutes and brings in the PDF and QR code. **InvoiceXpress: follow changes made in InvoiceXpress** runs every hour and picks up changes made from InvoiceXpress.

End-to-end example

Someone issues invoice FT A/5 in the InvoiceXpress web app for Mercearia Vila do Conde, Lda., for €335.79. The daily task, or the **Fetch** button in **Fetch from InvoiceXpress**, brings it into Odoo as a posted invoice, with its legal number and the ATCUD SIMA00FT-5, marked as **Issued outside Odoo**. It appears under **Invoicing › Customers › Invoices** and in **InvoiceXpress documents**, and Odoo does not send it again.



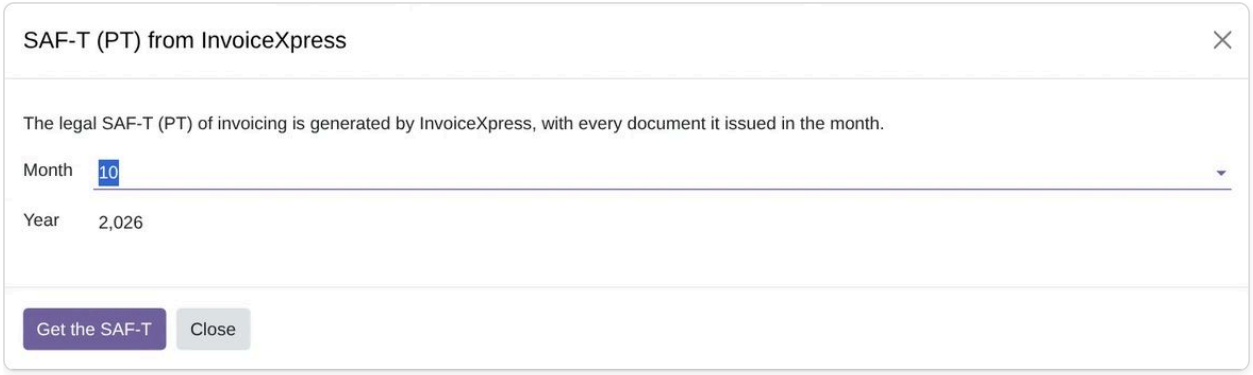
- **Real Odoo 20 screenshot.** The Mercearia Vila do Conde, Lda. invoice, brought in from InvoiceXpress and marked as **Issued outside Odoo**.

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14 Legal PDF, QR code and SAF-T (PT)

When you print or send an invoice issued with InvoiceXpress, Odoo uses the legal PDF provided by InvoiceXpress, with its ATCUD and QR code, and not its own invoice layout.

The connector requests the legal PDF and QR code right after issuing, and anything not ready yet is collected by the task **InvoiceXpress: fetch legal PDFs and QR codes**, every 2 minutes. If you print before then, Odoo requests it at that moment and, if InvoiceXpress is still generating it, asks you to try again in a few seconds.



- **Real Odoo 20 screenshot.** The **SAF-T (PT) from InvoiceXpress** wizard, with the **Month** and **Year** fields and the **Get the SAF-T** button.

You request the SAF-T (PT) yourself. Open the menu **SAF-T (PT) from InvoiceXpress**, in the reports section of Invoicing, and choose month and year. When it opens, the wizard suggests the month before the current one.

Company	The company for which the SAF-T is fetched. It only appears if you work with several companies, and comes with the active one.
Month	The month of the SAF-T. Required.
Year	The year of the SAF-T. Required.
Get the SAF-T	Asks InvoiceXpress for the invoicing SAF-T (PT) for that month.
Close	Closes the wizard.

How it is obtained

1. **Open the wizard**
   Go to the menu **SAF-T (PT) from InvoiceXpress**.
2. **Choose month and year**
   By default the previous month's values are shown.
3. **Click Get the SAF-T**
   InvoiceXpress generates the file. If it is still generating it, Odoo asks again several times.
4. **Download the file**
   When it is ready, the **File** field appears so you can download it. If something fails, the reason appears in **Message**.

> Only invoicing users can export the SAF-T; everyone else gets «Only invoicing users can export the SAF-T.». A SAF-T is not generated from Odoo: InvoiceXpress produces it from the documents it issued during the month. If there are no documents in that month, you get «There are no documents to export in that period.», and if InvoiceXpress is still generating it, «InvoiceXpress is still generating the file: press the button again in a minute.».

The legal PDF when printing and sending

For an invoice issued with InvoiceXpress, Odoo always uses the legal PDF from InvoiceXpress, both when printing and when sending: the connector stores it as the invoice PDF. There is no way to print it with Odoo's layout.

The connector requests the PDF right after issuing, and the task **InvoiceXpress: fetch legal PDFs and QR codes** collects those not yet ready every 2 minutes. If you print before it arrives, Odoo requests it at that moment and waits a few seconds; if InvoiceXpress is still generating it, it asks you to try again.

The SAF-T (PT): rules and conditions

- The SAF-T is the legal invoicing SAF-T (PT) for the month, and it is generated by InvoiceXpress, not by Odoo.
- It is requested per company, month and year. All three fields are required.
- If InvoiceXpress is still generating it, Odoo requests it again several times before giving up.
- Only an invoicing user can obtain it. If you are not one, Odoo shows "Only invoicing users can export the SAF-T.".

Wizard fields

Company	Pre-filled with the active company.
Month	Set to the month before the current one, in a list of options.
Year	Set to the year of the previous month, so in January it suggests last year.
File	The SAF-T obtained, read-only.
Message	Read-only text with the result of the request.

End-to-end example

In the demonstration database, invoice FT A/1 for Hotel Jardim da Boavista, S.A. is issued, and when printed Odoo delivers the InvoiceXpress PDF, not its own. At the start of the month you open **SAF-T (PT) from InvoiceXpress**, keep the previous month it suggests and click **Get the SAF-T**: InvoiceXpress generates the file with what it issued that month, and Odoo places it in **File** for download.

1. **Open SAF-T (PT) from InvoiceXpress**
   The wizard opens with the previous month already selected.
2. **Check month and year**
   Change **Month** or **Year** if the SAF-T you want is for another period.
3. **Click Get the SAF-T**
   InvoiceXpress generates it with the documents issued that month. Odoo waits and asks again while it is not ready.
4. **Download the file**
   You collect it in **File**; if something fails, you read the reason in **Message**.

15 The data that goes back and forth

FIELD	DIRECTION	WHEN
Invoices, credit notes and debit notes	From Odoo to InvoiceXpress	When you confirm them. If InvoiceXpress does not respond, the invoice stays as a draft and the **InvoiceXpress: retry pending issues** task retries it every minute. You can also click **Retry in InvoiceXpress**.
Legal number and legal data of the issued invoice	From InvoiceXpress to Odoo	When it is issued. **Update InvoiceXpress status** reads its status again.
Legal PDF and QR code	From InvoiceXpress to Odoo	Right after issuing; anything that is not ready is fetched by the **InvoiceXpress: fetch legal PDFs and QR codes** task every 2 minutes. The **Fetch the legal PDF** button requests it manually.
Receipts for reconciled payments	From Odoo to InvoiceXpress	After reconciliation, with the **InvoiceXpress: receipts of payments** task every 15 minutes or with **Update receipts in InvoiceXpress**.
Cancellations made in InvoiceXpress	From InvoiceXpress to Odoo	The **InvoiceXpress: follow changes made in InvoiceXpress** task every hour.
Cancellation of a legal document	From Odoo to InvoiceXpress	With **Cancel in InvoiceXpress** and **Cancel the legal document**, stating the reason.
Documents issued from the InvoiceXpress website or app	From InvoiceXpress to Odoo	The **InvoiceXpress: bring documents issued outside Odoo** task every day or the **Fetch** button. They are never sent again.
Customers, with their code, name, tax number, address, email and phone number	From Odoo to InvoiceXpress	With each document, and with **Send to InvoiceXpress** on the contact. If you change their tax details or their email, they are updated in InvoiceXpress.
Counts of calls and errors for the last hour	From Odoo to FlexigoTech Cloud	Every hour, with the **InvoiceXpress: connection health** task. No document or customer data.
Customers that already exist in InvoiceXpress	From InvoiceXpress to Odoo	With **Link**, from **Invoicing › Configuration › InvoiceXpress › Link existing contacts**.
Series and taxes	From InvoiceXpress to Odoo	With **Fetch series** and **Fetch taxes**.
Creating a series and registering it in the AT	From Odoo to InvoiceXpress	With **Create series** and **Register in the AT**.
Sales taxes	From Odoo to InvoiceXpress	With **Create in InvoiceXpress**, on the tax.
SAF-T (PT) for the month	From InvoiceXpress to Odoo	With **Get the SAF-T**.

Calls to InvoiceXpress do not go straight from your Odoo: they pass through FlexigoTech Cloud, which carries them to InvoiceXpress through its servers in Germany, in memory only, without storing or logging their content.

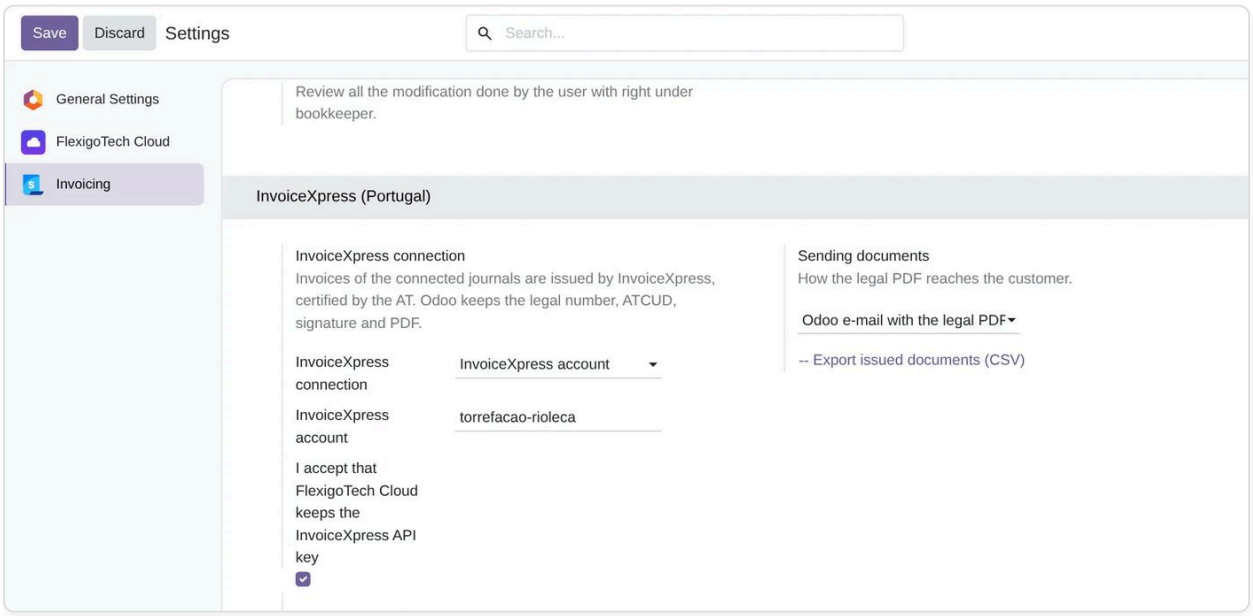
The InvoiceXpress API key is stored encrypted in FlexigoTech Cloud and does not return to Odoo. Without an active service, the connector issues nothing and the invoice stays pending until the service returns.

16 What happens on its own

TASK	FREQUENCY	WHAT IT DOES
InvoiceXpress: retry pending issues	Every minute	Checks which pending invoices are due a retry: each one after 1, 5, 15 and 60 minutes, then every hour, for about 24 hours. It also closes in Odoo any issues that InvoiceXpress finished but that were left half-done in Odoo.
InvoiceXpress: fetch legal PDFs and QR codes	Every 2 minutes	Downloads the legal PDF and the QR code that were not ready right after issuing.
InvoiceXpress: receipts of payments	Every 15 minutes	Compares the payments reconciled in Odoo with the InvoiceXpress receipts: creates the missing receipt and cancels the one for a reconciliation that was undone.
InvoiceXpress: follow changes made in InvoiceXpress	Every hour	Brings into Odoo whatever was changed by hand in InvoiceXpress, such as a cancellation made on its website.
InvoiceXpress: bring documents issued outside Odoo	Every day	Turns the documents issued from the InvoiceXpress website or app into confirmed Odoo invoices.
InvoiceXpress: connection health	Every hour	While the service is active, sends FlexigoTech Cloud the count of calls to InvoiceXpress over the last hour and of their errors, with no document or customer data.

You change the frequencies in **Settings › Technical › Automation › Scheduled Actions**, with developer mode turned on.

17 The connection options and their defaults



- **Real Odoo 20 screenshot.** The Invoicing settings, where you configure the connection with InvoiceXpress.

OPTION	WHEN CREATED	WHAT IT DOES
InvoiceXpress connection	**InvoiceXpress account**	Choose between your **InvoiceXpress account** and the **Offline simulator (not legal)**, which you use to try out the workflow on a demo database: what it issues is marked as simulated and is not a legal document.
InvoiceXpress account	Empty	The name of your account: the part of the address before .app.invoicexpress.com. It only accepts lowercase letters, digits and hyphens.
I accept that FlexigoTech Cloud keeps the InvoiceXpress API key	Unticked	You agree that FlexigoTech Cloud stores the key encrypted and that calls to InvoiceXpress go through it. Without ticking it, nothing is sent.
InvoiceXpress API key	Empty	It is sent only once to FlexigoTech Cloud, which stores it encrypted. It never comes back to your Odoo, so the field is always empty.
API key saved on	Empty	Read-only. It tells you when the key was saved. Next to it is **Disconnect InvoiceXpress**.
InvoiceXpress test mode	Unticked	With the box ticked, the connector only reads from InvoiceXpress: it does not create, issue or cancel anything.
InvoiceXpress account status	Empty	Read-only. **Test connection** writes it: how many series there are, how many are registered with the AT and how many taxes.
New series	Empty	The name of a series you want to create in InvoiceXpress: letters, digits and . - _ only, and it cannot start with «at». Once a name is entered, **Create series** appears.

Only an administrator can change the connection. You must tick the consent box before sending the key. If you change the account name, the saved key stops being valid and you have to save it again.

What you do by hand

WHERE	BUTTONS
InvoiceXpress connection block	**Disconnect InvoiceXpress**, next to **API key saved on**; **Test connection**, **Fetch series**, **Fetch taxes** and **Series**, which opens the list of series; and **Create series**, which appears when you type a **New series**.
Sending documents block	**Export issued documents (CSV)**.

Disconnect InvoiceXpress deletes the key from FlexigoTech Cloud. Documents already issued stay in InvoiceXpress and in Odoo. **Create series** creates the series in InvoiceXpress. An administrator does it. The series starts unregistered with the AT (N/D) and is registered from the list of series once InvoiceXpress has the AT credentials. **Export issued documents (CSV)** downloads a local copy of what has been issued, with the legal number, the ATCUD, the signature, the status, the date and the total of each document. Any invoicing user can use it.

There are no more options in the connection. Everything else is set in each sales journal (the document type and the series), in each sales tax (its InvoiceXpress tax and the exemption reason) and in the bank payment methods (the InvoiceXpress payment method).

18 Security and personal data

- The InvoiceXpress API key is stored encrypted in the FlexigoTech Cloud vault and never comes back to your Odoo. Only the date it was saved, the account name and the link to that database remain in your Odoo.
- Before saving the key you must accept that FlexigoTech Cloud keeps it and that calls to InvoiceXpress go through it. Until you accept, nothing is sent. Whoever saves the connection is the one who accepts, on behalf of their company.
- Only an administrator can change the InvoiceXpress connection: the account name, the key, the mode and the consent.
- The **Register the series in the AT**, **Make default**, **Register in the AT**, **Cancel in InvoiceXpress** and **Create in InvoiceXpress** buttons are visible to users with accounting manager permissions. **Retry in InvoiceXpress**, **Update InvoiceXpress status** and **Send by InvoiceXpress** are visible to users with invoicing permissions.
- Your data stays in your Odoo. Through FlexigoTech Cloud, only what the connector sends to InvoiceXpress or asks it for goes through: the documents, with their lines, amounts and taxes, and the details of each customer that appear on them: name, code, tax number, address, email and phone.
- That data passes through FlexigoTech's servers in Germany, in memory only: its content is neither stored nor logged.
- If you disconnect the account, the key is deleted from the FlexigoTech Cloud vault. Documents already issued remain in InvoiceXpress and in Odoo.
- Nothing is sent from a database copy, so a copy can never issue a legal document on your live account.
- Every hour, the **InvoiceXpress: connection health** task sends FlexigoTech Cloud the count of calls and errors from the last hour, with no document or customer data.

Operations log

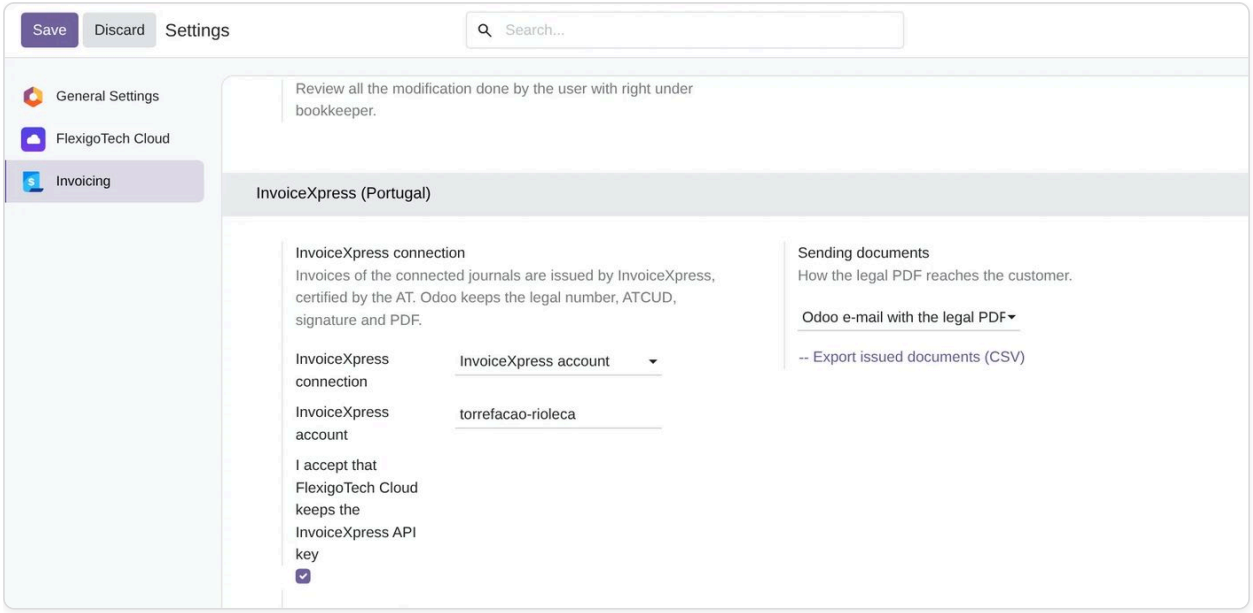
The connector records one line for each call to InvoiceXpress, in the **InvoiceXpress operation log**. No key or personal data. Each line shows when it happened, the operation, the HTTP code, the result and how long it took. Odoo automatically deletes lines older than 180 days.

19 Several accounts and several companies

Each Odoo company has its own InvoiceXpress connection: its account name, its key and its options. It is set up in **Settings**, in the **InvoiceXpress (Portugal)** block, with that company selected in the company switcher. Each connection issues and reads only the documents of its own company.

The number of InvoiceXpress accounts you can connect depends on your FlexigoTech Cloud plan: up to 3 with Standard and up to 10 with Pro. If you reach the limit, the connector sends nothing and warns you with «Your FlexigoTech Cloud plan covers no more InvoiceXpress companies on this database, so nothing was sent. Disconnect one you no longer use, or move to Pro in Settings > FlexigoTech Cloud.».

Data from different companies is never mixed: each connection uses its own key and its own InvoiceXpress account, and documents issued outside Odoo are brought into the company of that connection, with its journals and contacts.



- **Real Odoo 20 screenshot.** A company's connection in **Settings**, with its **InvoiceXpress account** and its **InvoiceXpress account status**.

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20 If something goes wrong

The connection buttons do nothing, or the connector doesn't talk to InvoiceXpress	The connector needs a FlexigoTech Cloud subscription or the free trial. Without one, it cannot communicate with the platform. Check the status in **Settings**, in the **FlexigoTech Cloud** section.
You get «InvoiceXpress is not configured for ...: set the account name and save the API key in Settings > Invoicing > InvoiceXpress.»	The account name or the API key is missing. Enter them and save them in the invoicing settings. The name only accepts lowercase letters, digits and hyphens.
You get «This database is a copy of the one that saved the InvoiceXpress key: nothing is sent from a copy, so it can never issue a legal document in the real account. Save the key again here if this database is the one that must issue.»	Nothing is sent from a copy. If this database is the one that should issue, save the key again here.
You see "Only invoicing users can do this." or another permissions notice	The action requires a permission your user does not have: invoicing user, accounting manager or administrator, depending on the notice.
An invoice stays in draft with «Pending issue in InvoiceXpress»	InvoiceXpress did not respond in time. Click **Retry in InvoiceXpress** or wait: each invoice retries automatically after 1, 5, 15 and 60 minutes and then every hour, for about 24 hours, always with the same document identifier, so it is never issued twice.
You want to know what InvoiceXpress replied	Open the **InvoiceXpress operation log**: each call with its operation, HTTP code, result and time. On the document, in **InvoiceXpress documents**, the latest failure appears in the last error section.

If the cause is on the FlexigoTech Cloud side (the service is not active or the gateway is paused), nothing has reached InvoiceXpress: the connector retries every 5 minutes without using up any of the retries, and the invoice is issued as soon as the service is back.

Other notices you may see

«Choose the InvoiceXpress series of this journal first.»	Select a series in the **InvoiceXpress** section of the journal before continuing.
"Only sales journals can issue with InvoiceXpress."	Enable issuing only on journals of the sales type.
«InvoiceXpress test mode is on: the connector only reads from InvoiceXpress and does not send anything. Turn it off in Settings to issue.»	Turn off test mode in the settings to be able to issue.
«Before saving the InvoiceXpress API key, accept that FlexigoTech Cloud keeps it and that the calls to InvoiceXpress go through it. Nothing was sent.»	Accept the consent and save the key again.
«Your FlexigoTech Cloud plan covers no more InvoiceXpress companies on this database, so nothing was sent. Disconnect one you no longer use, or move to Pro in Settings > FlexigoTech Cloud.»	Disconnect a connection you don't use or change plan.
"This document is being sent to InvoiceXpress right now (another click or the automatic retry). Wait a few seconds and reload."	Wait a few seconds and reload the screen. Do not click again.
«InvoiceXpress is still generating the legal PDF of .... Try again in a few seconds.»	Repeat the action after a moment. A scheduled task also collects pending PDFs.
«... has no e-mail address.»	Add an email to the contact before sending the document.
"Only issued documents can be sent."	Issue the document first; drafts are not sent.
"The reason is required."	Enter a reason in order to cancel the legal document.

21 Other ways of doing it

OPTION	WHAT IT INVOLVES
By hand from the InvoiceXpress panel	You issue each document in the InvoiceXpress panel and register it again by hand in Odoo. The two accountings are kept separate.
Odoo alone	In the Odoo 20 code, Community and Enterprise, there is no module with "invoicexpress" in its name and no manifest that names it (search of 17-11-2026). Odoo does not issue documents in InvoiceXpress on its own.
This connector	You confirm the invoice in Odoo and the connector issues it in InvoiceXpress. For this it needs a FlexigoTech Cloud subscription, which carries the calls to InvoiceXpress. Without an active service, nothing is issued.

If you were already issuing documents from the InvoiceXpress website or app, the **Fetch from InvoiceXpress** option brings them into Odoo as confirmed invoices, with their legal number, marked **Issued outside Odoo**. They are never sent again. In the window you choose from which date to bring them with **Issued since**, which is mandatory and proposes the date 31 days ago.

22 Plans and price

€9

License per Odoo version.

+ FlexigoTech Cloud

STANDARD

€49/month

or €490 a year

- First response within 1 working day
- Up to 3 accounts

PRO

€98/month

or €980 a year

- First response within 4 working hours
- Up to 10 accounts
- Video call if needed

14-day trial, no card **Prices exclude VAT**

The module licence is per Odoo version. FlexigoTech Cloud is paid monthly or yearly, and the 14-day trial does not require a card. With Standard, up to 3 InvoiceXpress accounts, one per company; with Pro, up to 10.

23 Frequently asked questions

What does the connector do?

It issues in InvoiceXpress the invoices you confirm in Odoo, which come back with their legal number, their ATCUD and their signature.

Does the connector already issue credit notes and debit notes, simplified invoices and invoice-receipts?

Today, credit notes, debit notes, simplified invoices (FS) and invoice-receipts (FR) fail against live InvoiceXpress: InvoiceXpress rejects them because the connector sends them with the FT invoice series. This is fixed in the next version of the module. With a series registered with the AT, the connector sends FT invoices and RG receipts for payments. Against live InvoiceXpress, these were tested without that condition, because a test account cannot register series.

Does it work without a FlexigoTech Cloud subscription?

No. Without the trial or the subscription, the connector issues nothing and the invoice stays pending until the service is back.

How long does the trial last, and is a card needed?

The trial lasts 14 days and does not require a card.

Does it work on Odoo Online?

No. Odoo Online does not allow installing third-party modules.

Which Odoo versions does it work on?

There is a branch of the module for each of Odoo versions 17, 18, 19 and 20.

Does it need Odoo Enterprise?

No. It only depends on Odoo's invoicing module, which is in Community, and on FlexigoTech Cloud.

Does it turn Odoo into software with AT certification?

No. The legal document is issued by InvoiceXpress, with its own AT certification, which is the one printed on it. Odoo stores the legal number, the ATCUD, the signature and the PDF.

Does InvoiceXpress's 30-day trial work?

For issuing from Odoo, no. That trial does not communicate documents to the AT, and its series cannot be registered with the AT because it asks for the Portal das Finanças credentials: it stays at N/D, and the connector does not issue with an unregistered series. A paid account with the AT connected is required.

How was it tested?

Against a simulator built from the official InvoiceXpress API definition (OpenAPI 3.1), because InvoiceXpress has no sandbox environment. Every request is checked against the official schemas, and some of its 143 automated tests cut the connection at each step of an issue to check that a second document never goes out. On 17 November 2026 it was also tested with a live InvoiceXpress trial account: the connection, the series, the taxes, and the invoices issued outside Odoo, and, removing only in the test the check for a series registered with the AT, an FT invoice, an RG receipt, a cancellation, and an interrupted issue that is not duplicated. Today credit notes, debit notes, simplified invoices (FS) and invoice-receipts (FR) fail against live InvoiceXpress: InvoiceXpress rejects them because the connector sends them with the FT invoice series. This is fixed in the next version of the module. The real ATCUD and QR code require a series registered with the AT, which a trial account cannot have.

What do I need in InvoiceXpress?

A paid InvoiceXpress account, with the AT credentials configured there. You need the account name and the API key, which is in InvoiceXpress, under Account › Integrations › API.

Does the connector create my InvoiceXpress account?

No. You must already have the InvoiceXpress account.

Who can connect the account?

Only an administrator. If another user tries, Odoo replies "Only an administrator can change the InvoiceXpress connection."

Where is my API key stored?

It is stored encrypted in FlexigoTech Cloud and never returns to your Odoo.

How does data travel to InvoiceXpress?

The calls pass through FlexigoTech's servers in Germany, in memory only, with their content neither stored nor logged.

How many InvoiceXpress accounts can I connect?

Up to 3 with the Standard plan and up to 10 with Pro.

What happens if I reach the account limit?

The connector sends nothing and warns you with «Your FlexigoTech Cloud plan covers no more InvoiceXpress companies on this database, so nothing was sent. Disconnect one you no longer use, or move to Pro in Settings > FlexigoTech Cloud.».

How much does it cost?

The module license costs €9 per Odoo version. FlexigoTech Cloud prices, VAT not included, are €49 a month or €490 a year with Standard, and €98 a month or €980 a year with Pro.

Does it work with several Odoo companies?

Yes. Each company has its own connection, with its own account name, key and options, and it issues and reads only its own documents.

When is the invoice issued in InvoiceXpress?

When it is confirmed. It is enabled per sales journal.

What happens if InvoiceXpress does not respond when I confirm?

The invoice stays pending in draft, and each invoice retries automatically after 1, 5, 15 and 60 minutes and then every hour, for about 24 hours, always with the same document identifier. You can also click **Retry in InvoiceXpress**.

Can an invoice be issued twice?

No. Each invoice travels with its own identifier and the retry uses the same one, so InvoiceXpress returns the original document instead of creating another.

Where do the legal number, the ATCUD and the signature come from?

InvoiceXpress provides them when it issues the invoice. With **Update InvoiceXpress status** you read them again.

How often do the legal PDF and the QR code arrive?

The connector requests them right after issuing. If InvoiceXpress does not have them yet, the scheduled task collects them every 2 minutes. Confirming never fails because of them.

And the payment receipts?

They are issued when the payment is reconciled. The receipts task runs every 15 minutes and issues any that are missing.

How often are changes made in InvoiceXpress read?

Every hour. If someone cancels a document there, the Odoo invoice reflects it.

What happens to the documents I issued before installing it?

Fetch from InvoiceXpress brings them into Odoo as confirmed invoices, with their legal number, marked as **Issued outside Odoo**. They are never sent again.

Are documents issued outside Odoo brought in automatically?

Yes, a daily task brings them in. You can also bring them in manually by choosing the date in **Issued since**.

What about my customers who already exist in InvoiceXpress?

Link existing contacts matches them with your contacts by the same code, the same VAT number or, if nothing else matches, the same unique name.

How does it identify my customers?

By a fixed code: the internal reference of the contact or, if it has none, its own ODOO- code followed by the contact's internal number (ODOO-42, for example). It does not identify them by name.

Can I cancel an issued document?

Yes, with **Cancel in InvoiceXpress**, which accounting managers use. It requires a reason and cancels both the legal document in InvoiceXpress and the Odoo journal entry at the same time.

Can I reset an issued invoice to draft or delete it?

No. A legal document cannot go back to draft or be deleted; to void it, use cancellation or a credit note.

Which printout does Odoo use for an invoice issued with InvoiceXpress?

Print and send use the legal PDF from InvoiceXpress. There is no way to print it with the Odoo layout.

Can I get the SAF-T (PT)?

Yes, from **SAF-T (PT) from InvoiceXpress**, by choosing the month and year. InvoiceXpress generates it with the documents it issued that month.

What does the operations log store?

One line for each call to InvoiceXpress, with the date, the operation, the result and the time taken. It does not store the key or personal data.

Does it create and register series with the AT?

Create series creates the series in InvoiceXpress, but it starts unregistered with the AT. Nothing is issued until it is registered with **Register in the AT**, which requires that InvoiceXpress already has the AT credentials.

What does it check before issuing?

Check the invoice before sending anything. If something would make InvoiceXpress or the AT reject it, such as a 0 % tax with no exemption reason or an unregistered series, «Invalid Operation» appears and the invoice is not issued.

Is there a test mode without legal validity?

Yes, the **Offline simulator (not legal)**. Its documents have no legal validity. With InvoiceXpress test mode enabled, the connector only reads and sends nothing.

And if I disconnect the connector?

Disconnect InvoiceXpress deletes the key from FlexigoTech Cloud. Documents already issued remain in InvoiceXpress and in Odoo.

24 Glossary

InvoiceXpress	The invoicing platform where legal documents are issued. The connector issues in it the invoices you confirm in Odoo.
Connection	The link between an Odoo company and an InvoiceXpress account: its account name, its key and its options. It is set up in **Settings**, in the **InvoiceXpress (Portugal)** block.
Account name	The part of the InvoiceXpress address before .app.invoicexpress.com. It only accepts lowercase letters, digits and hyphens.
API key	The key that is copied from InvoiceXpress and that the connector sends once to FlexigoTech Cloud, which stores it encrypted. It does not return to your Odoo.
FlexigoTech Cloud	The online service through which the calls to InvoiceXpress pass. Without the trial or the subscription, the connector issues nothing.

Free trial	The 14 days without a card with which you start using the connector.
Standard plan and Pro plan	The two FlexigoTech Cloud plans for this connector. Standard allows up to 3 accounts and Pro up to 10.
AT	The Autoridade Tributária e Aduaneira of Portugal. Each series is notified to it before use (Decreto-Lei 28/2019, art. 35.º).
ATCUD	The unique code of each document, which InvoiceXpress gives when issuing it. It includes the validation code that the AT gave to its series (Decreto-Lei 28/2019, art. 35.º, n.º 2).
Signature (4 characters)	The 4 characters of the signature of the issued document.
Legal number	The number InvoiceXpress assigns to the document, which becomes the name of the invoice in Odoo.
Series	The numbering with which a journal issues. It is shown in **Invoicing › Configuration › InvoiceXpress › Series**; a new series starts unregistered with the AT.
AT validation code	The code that Odoo calculates for the journal from the series and the document type. If the series is not registered, it shows N/D.
Sales journal	The Odoo journal where **Issue with InvoiceXpress** is enabled. Only sales journals can issue.
AT exemption reason	The reason required for a 0% tax on documents issued with InvoiceXpress.
Document issued outside Odoo	One issued from the InvoiceXpress website or app. It is brought into Odoo as a confirmed invoice and is never sent again.
Legal PDF	The PDF provided by InvoiceXpress. It is the one Odoo uses when printing and sending an issued invoice.
Operations log	The list with one line for each call to InvoiceXpress, without the key or personal data.
Offline simulator	An option of the connection whose documents have no legal validity.
SAF-T (PT)	The monthly legal invoicing file. It is generated by InvoiceXpress, not by Odoo.

25 Checklist and contact

- [ ] You have a paid InvoiceXpress account, with the AT credentials configured there, and at hand the account name and the API key.
- [ ] Your Odoo is version 17, 18, 19 or 20, on Odoo.sh or on your own server. Third-party modules cannot be installed on Odoo Online.
- [ ] You have an administrator user and the Invoicing app installed.
- [ ] You have installed the connector and the FlexigoTech Cloud module it depends on.
- [ ] You have activated FlexigoTech Cloud in **Settings** and started the 14-day free trial without a card.
- [ ] In **Settings**, **InvoiceXpress (Portugal)** block, you have saved the account name and the API key, and **Test connection** says it is connected.
- [ ] The FlexigoTech Cloud status in **Settings** says the database is connected.
- [ ] You have reviewed the connection options.
- [ ] Your sales taxes have their **InvoiceXpress tax** set and the 0% ones have an **AT exemption reason**.
- [ ] The sales journal has **Issue with InvoiceXpress** turned on and a series registered with the AT.
- [ ] You have confirmed a test invoice and it has come back with its legal number, its ATCUD and its signature.

Every purchase includes 2 months of support: we help you install it, set it up and get it working, by email and video call. While you're subscribed, support for the service stays included.

If you'd like us to set it up with you, get in touch.

Email
To install it, set it up or for any question.
comercial@flexigotech.com

On the web
The connector page, with the guide and the prices.
flexigotech.com/en/invoicexpress-connector-odoo.html

On Odoo Apps
The module page on the Odoo store.
apps.odoo.com

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