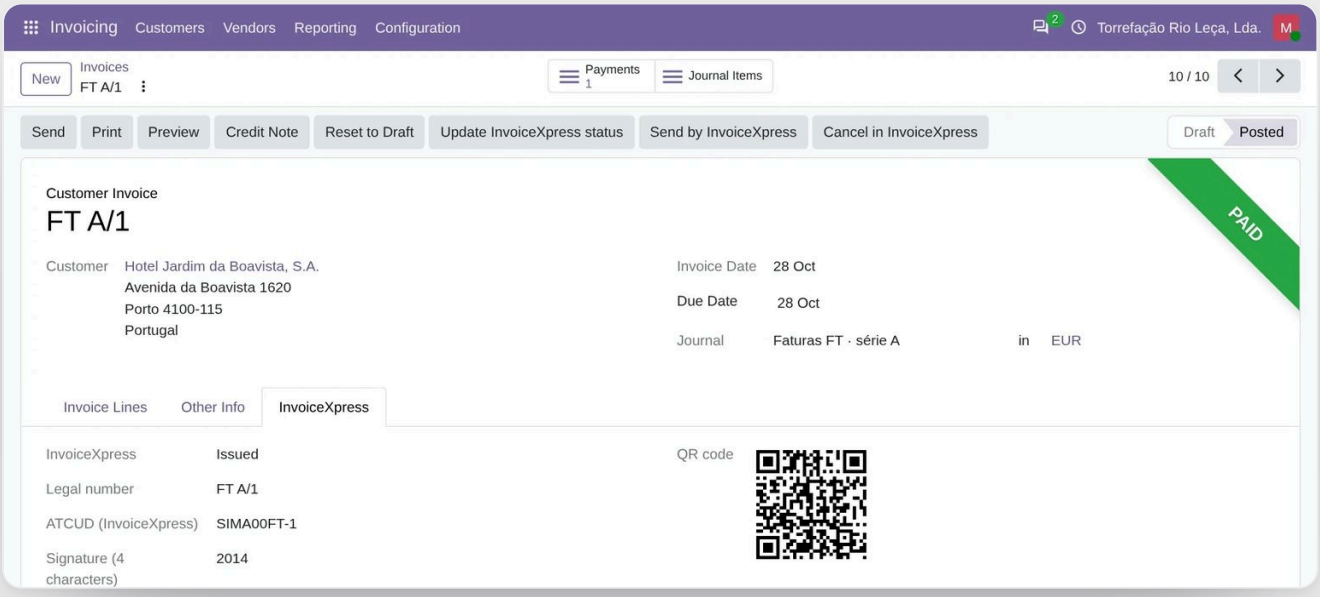
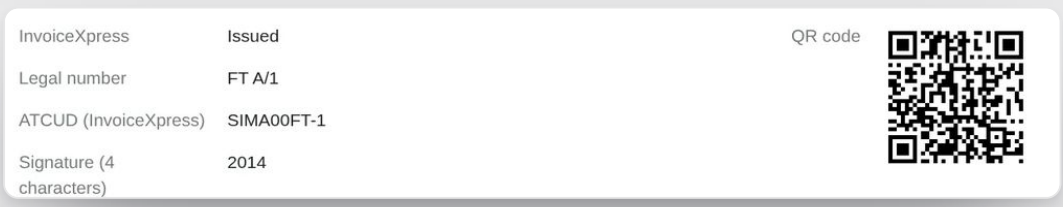
USER MANUAL · INVOICING AND TAX

InvoiceXpress connector for Odoo

For those who already have the connector: install it, activate it, connect it, set it up and use it, step by step.

Module version 20.0.1.1.1 | Odoo 20 screenshots | Edition of 18-11-2026





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.

Contents

On the right, the page where each section starts. Menu and button names are those of Odoo in English.

1	What it is and where it is	3
2	Before you start	4
3	Installation	5
4	Activate FlexigoTech Cloud: the 14-day trial	6
5	Connecting your InvoiceXpress account	8
6	The connection options	10
7	Issuing invoices	11
8	Journals and series	13
9	Taxes	15
10	Customers and contacts	16
11	Payments and receipts	18
12	Cancellations and status	19
13	Import from InvoiceXpress	20
14	Legal PDF and SAF-T	21
15	What happens automatically	23
16	If something goes wrong	23
17	Support	25

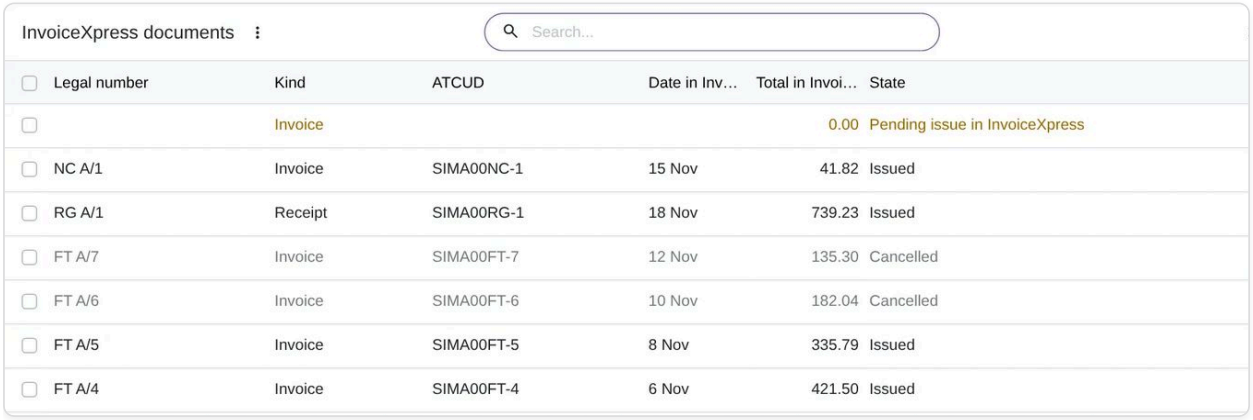
This manual describes version 20.0.1.1.1 of the module (Odoo branch 20.0, commit 54681c57e). Everything it says comes from its code: menus, buttons, fields, scheduled actions and error messages.

The screenshots come from a test Odoo 20 database, with a made-up company and data and no real connection to InvoiceXpress. In Odoo 17, 18 and 19 the module has its own version: if something on your screen does not match, write to us.

1 What it is and where it is

The connector issues your invoices, credit notes and receipts from Odoo through InvoiceXpress. It is not a separate app: it adds its menus, tabs and buttons to Odoo's Invoicing app.

> 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 **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 website or app. Only accounting managers can see it.
Link existing contacts	Opens the wizard that matches your InvoiceXpress customers with Odoo contacts.
Operation log	Opens the **InvoiceXpress operation log**, with each call, its result and its time. Only accounting managers can 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**.

2 Before you start

Before installing the connector and connecting your first account, have the following to hand.

- A paid InvoiceXpress account, opened by you and with the AT connected. The 30-day trial does not work 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 log in with, and the API key, found in InvoiceXpress under Account › Integrations › API.
- The AT credentials configured in InvoiceXpress, not in Odoo: with them InvoiceXpress reports the documents and registers the series.
- Odoo 17, 18, 19 or 20, on Odoo.sh or on your own server. Odoo Online does not allow installing third-party modules, so the connector does not work there.
- An administrator user. Only an administrator can change the connection with InvoiceXpress.
- The FlexigoTech Cloud module, on which the connector depends. Calls to InvoiceXpress go through FlexigoTech Cloud, and without a trial or subscription nothing is sent to InvoiceXpress.

> 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.

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

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.

3 Installation

The module is installed like any third-party Odoo module. An administrator is required.

How to get it

From its Odoo Apps page (**https://apps.odoo.com/apps/modules/20.0/flexigobe_invoicexpress_connector**) or from the connector's page on flexigotech.com. Choose the Odoo version you use: each version is a separate module.

The module depends on `flexigotech_cloud`, the connection to FlexigoTech Cloud. On Odoo Apps, the module page lists it under "Community Apps Dependencies" and its price already includes it; it is also free and has its own page (**https://apps.odoo.com/apps/modules/20.0/flexigotech_cloud**). Put both folders together in the same module path and Odoo installs `flexigotech_cloud` at the same time.

On Odoo.sh

1. **Upload the folders to your repository**
   Copy `flexigobe_invoicexpress_connector` and `flexigotech_cloud` into your project branch, in your modules folder, and push.

2. **Wait for Odoo.sh to build the branch**
   When it finishes, both modules are in the branch.

3. **Install the app**
   In **Apps**, click **Update Apps List** (with developer mode), remove the **Apps** filter from the search bar (it is set by default and hides modules that are not applications, such as this one), search for "InvoiceXpress" and click **Activate**.

On your server

1. **Copy the folders**
   Place `flexigobe_invoicexpress_connector` and `flexigotech_cloud` in a folder that is on the `addons_path` of your Odoo.

2. **Restart Odoo**
   So it reads the new modules.

3. **Install the app**
   In **Apps**, **Update Apps List**, remove the **Apps** filter from the search bar (it is set by default and hides modules that are not applications, such as this one), search for "InvoiceXpress" and click **Activate**.

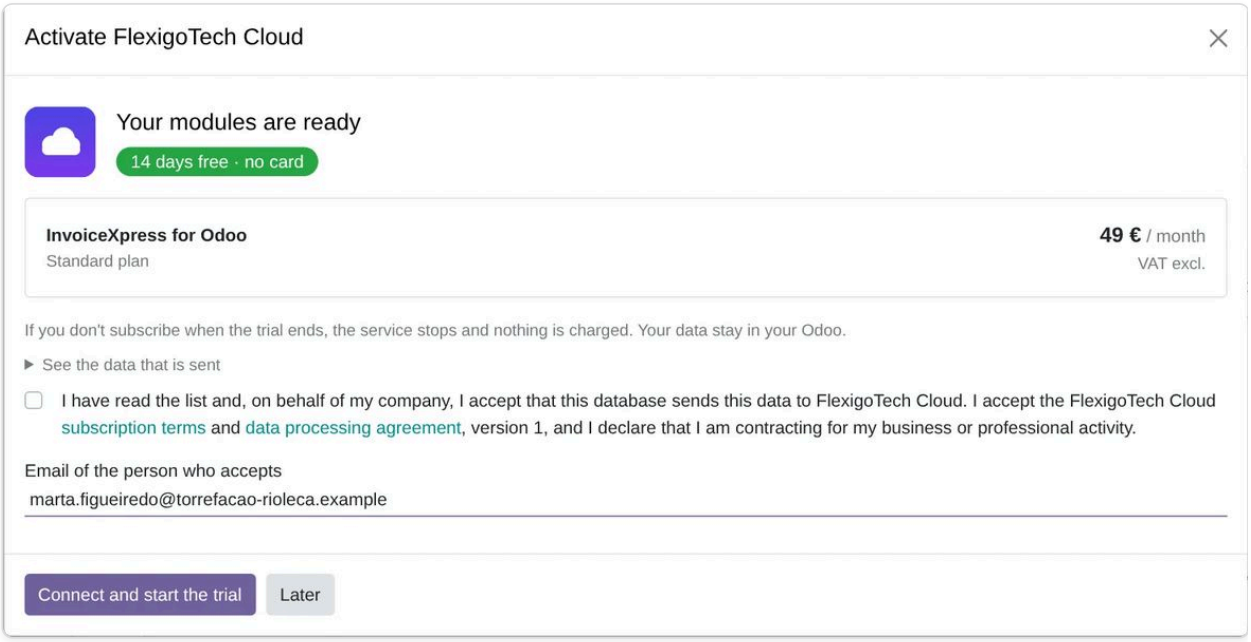
> When installing it, Odoo also installs the apps the module depends on: Invoicing. If you already use them, nothing you have changes.

4 Activate FlexigoTech Cloud: the 14-day trial

Calls to InvoiceXpress go through FlexigoTech Cloud, the FlexigoTech service that stores your credentials encrypted. Until the database is connected and the module has a trial or subscription, the connector does not talk to InvoiceXpress.

1 Click Activate in the top bar

It appears as soon as you install the module. Open the **Activate FlexigoTech Cloud** window, with the Standard plan and its 14 free days, no card required.



- **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

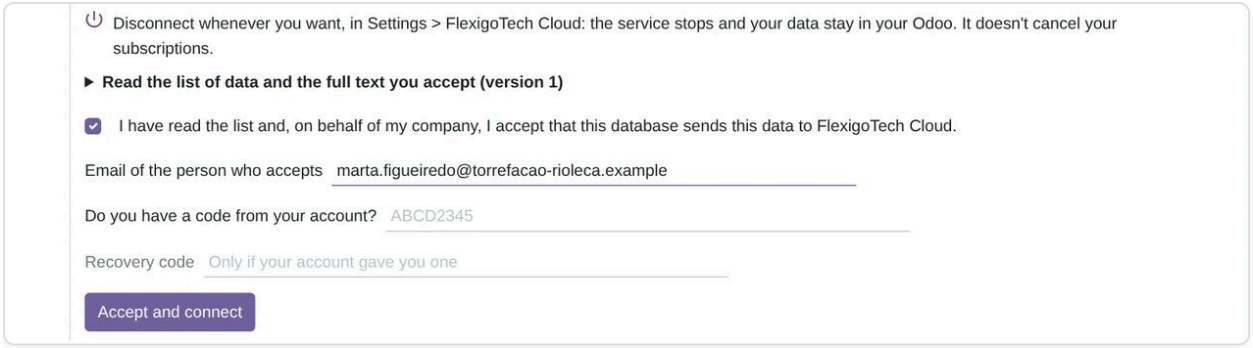
Tick «I have read the list and, on behalf of my company…» (which includes the subscription terms and the data processing agreement) and enter the **Email of the person who accepts**.

3 Click Connect and start the trial

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

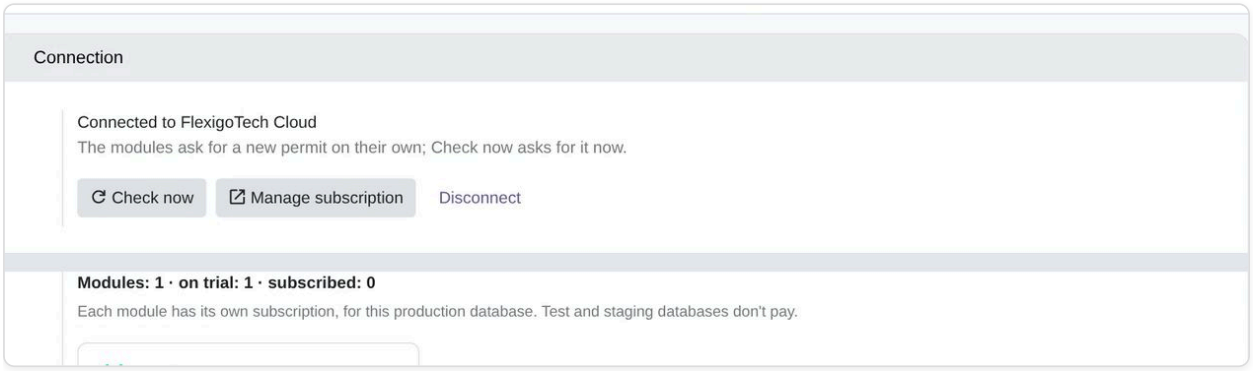
The same, from Settings

In **Settings › FlexigoTech Cloud** is the full list of what the database sends. Tick the box, enter the email and click **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**, and so on. From there you choose the plan (Standard or Pro, monthly or yearly) and click **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.

PLAN	PRICE	INCLUDES
Standard	€49 per month or €490 per year	Support response within 1 business day, up to 3 accounts
Pro	€98 per month or €980 per year	Response within 4 business hours, up to 10 accounts and video call if needed

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 automatically every 6 hours).

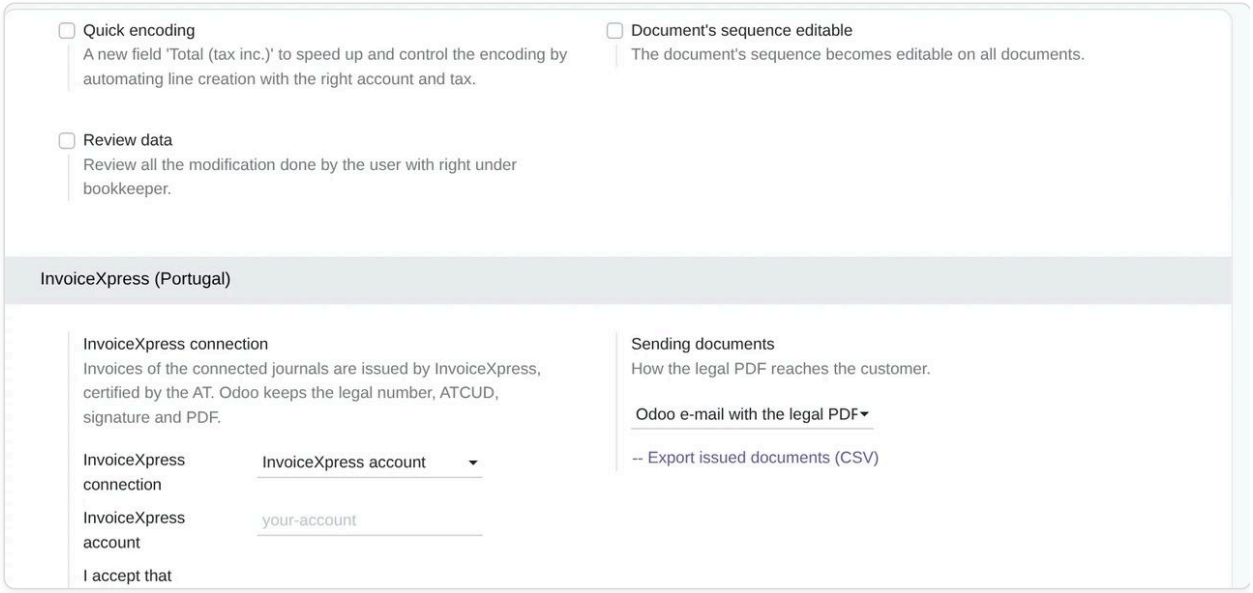
> You cannot start a trial on a neutralised copy (staging) or on a database with demo data: Settings says «This database is a neutralised copy or has demo data, so trials can't be started here.».

5 Connecting your InvoiceXpress account

The InvoiceXpress connection is configured in **Settings**, in the **InvoiceXpress (Portugal)** block of the **Invoicing** section, with the InvoiceXpress account of the company you are in. An administrator does this.

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 of **Settings**, before connecting.

2 Enter the account name

Enter your InvoiceXpress account name, the part before .app.invoicexpress.com. It only accepts lowercase letters, digits and hyphens, and Odoo converts it to lowercase when 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 ticked 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.».

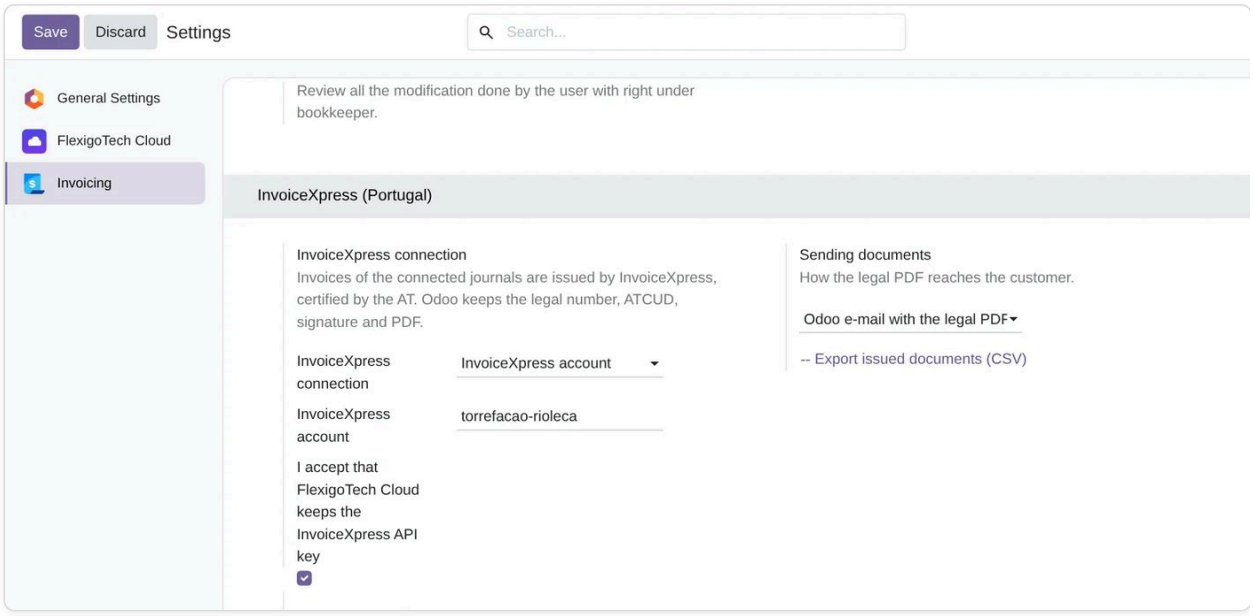
4 Paste the API key and save

Paste the InvoiceXpress API key and click **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

Click **Test connection**: **InvoiceXpress account status** tells you how many series you have, how many are registered with the AT and how many taxes. Then click **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.



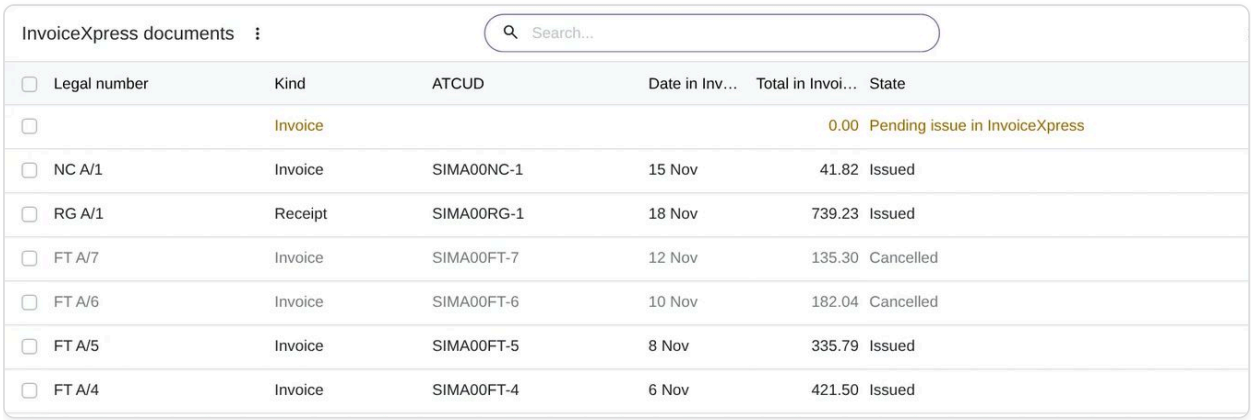
- **Real Odoo 20 screenshot.** The connected account, with **API key saved on** and **InvoiceXpress account status**.

6 Connect a sales journal

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

> Only an administrator can give the consent or set 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 have to save the key again. A copy of the database sends nothing to InvoiceXpress until you save the key again in it.

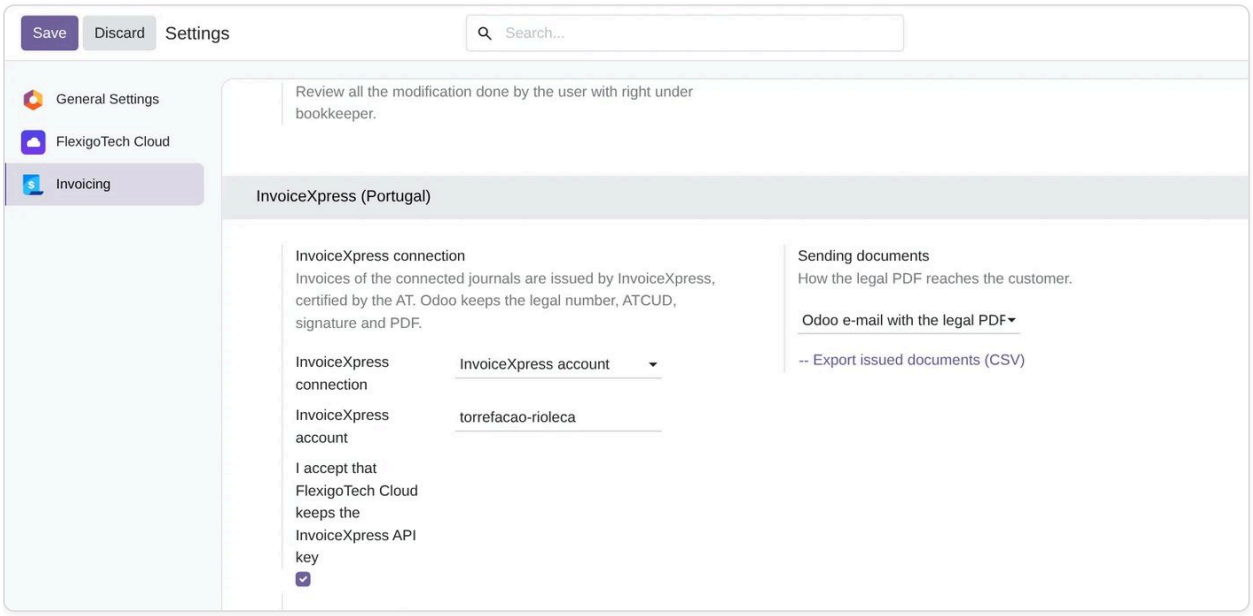
After connecting, the connector works on its own with six scheduled tasks, active from installation. One checks every minute which pending issuances need retrying, another every 2 minutes collects the missing legal PDFs and QR codes, another every 15 minutes issues the receipts for payments, another every hour follows 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 take a local copy of what has been 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.

6 The connection options

The InvoiceXpress connection is configured in the Invoicing settings, in the InvoiceXpress block.



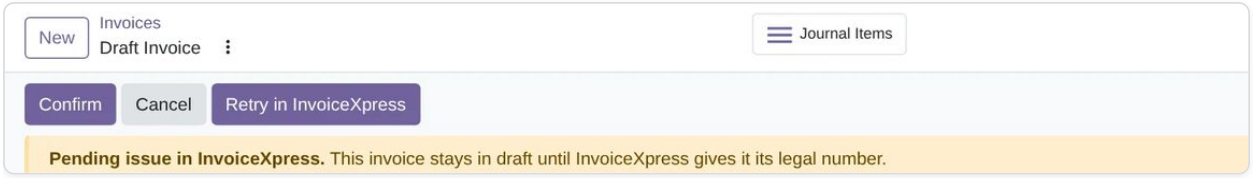
- **Real Odoo 20 screenshot.** The Invoicing settings, where the InvoiceXpress connection is configured.

OPTION	WHEN CREATED	WHAT IT DOES
InvoiceXpress connection	**InvoiceXpress account**	Choose between your **InvoiceXpress account** and the **Offline simulator (not legal)**, which is useful for testing the workflow in a demonstration database: what it issues is marked as simulated and is not a legal document.
InvoiceXpress account	Empty	Your account name: 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	Unchecked	You agree that FlexigoTech Cloud stores the key encrypted and that calls to InvoiceXpress go through it. If unticked, nothing is sent.
InvoiceXpress API key	Empty	It is sent to FlexigoTech Cloud only once, which stores it encrypted. It never returns to your Odoo, so the field is always shown empty.
API key saved on	Empty	Read-only. Shows when the key was saved. Next to it is **Disconnect InvoiceXpress**.
InvoiceXpress test mode	Unchecked	With the box ticked, the connector only reads from InvoiceXpress: it does not create, issue or cancel anything.
InvoiceXpress account status	Empty	Read-only. Written by **Test connection**: 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. Before sending the key you must tick the consent box. If you change the account name, the saved key stops being valid and you have to save it again.

7 Issuing invoices

When you confirm a sales invoice in a connected journal, the connector issues it in InvoiceXpress and returns it to Odoo with its legal number, its ATCUD and its signature.



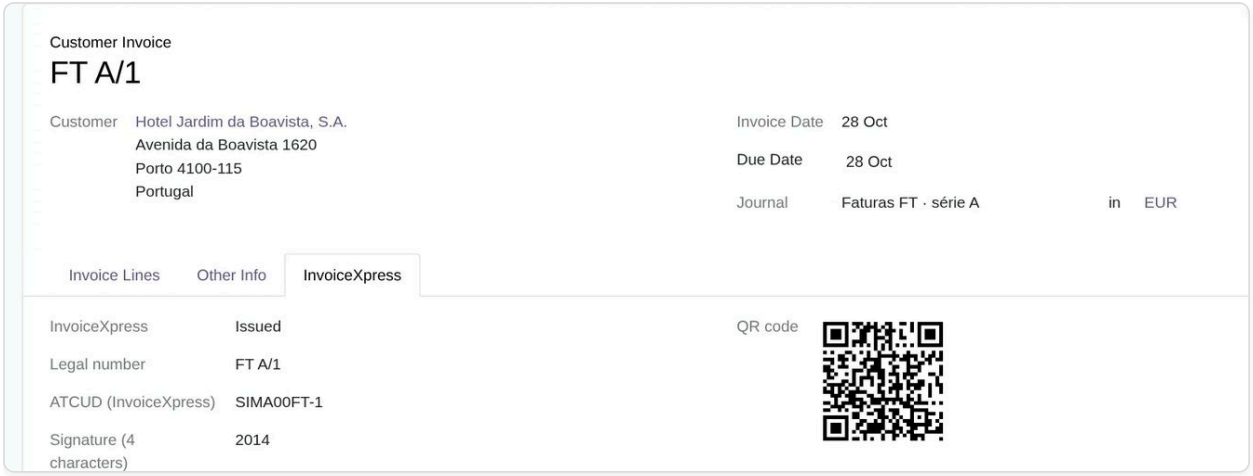
- **Real Odoo 20 screenshot.** A draft invoice with the warning **Pending issue in InvoiceXpress** and the button **Retry in InvoiceXpress**.

Where each piece of data comes from

- When you press **Confirm**, the invoice is issued in InvoiceXpress at that moment and Odoo takes the legal number as its name.
- If InvoiceXpress or FlexigoTech Cloud does not respond, the invoice stays in draft with the warning **Pending issue in InvoiceXpress**. Each invoice is retried automatically after 1, 5, 15 and 60 minutes, 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. Anything 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

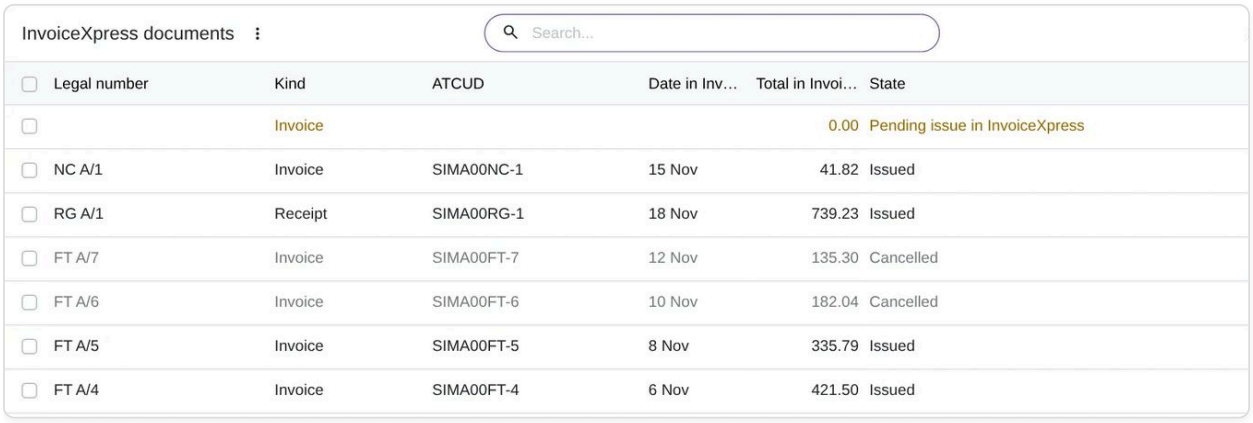
Retry in InvoiceXpress	Appears on a draft invoice with pending issue, draft in InvoiceXpress, or with an error. It follows the same path as **Confirm** and never creates a second legal document.
Update InvoiceXpress status	Reads the document in InvoiceXpress and shows whatever has changed there. Appears 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.

States

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

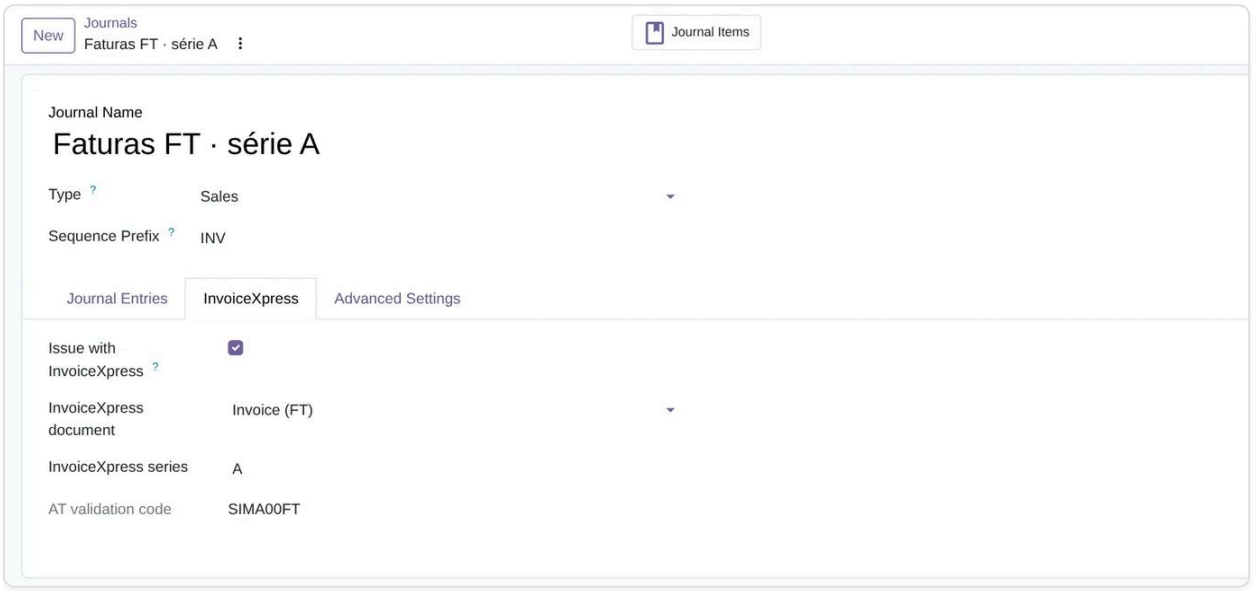
2. **If there is no response, wait**
   The invoice stays in draft and is retried automatically.

3. **Check the number**
   When issued, the invoice takes the legal number, the ATCUD and the 4-character signature.

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

8 Journals and series

Each sales journal is switched on to issue with InvoiceXpress and is linked to a document type and to a series registered with the AT.



- **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 via **Fetch series**, or you create them from Odoo with **New series** and **Create series**. They are listed under **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 document type you choose on it.

In Portugal, each series of documents is communicated to the AT before it is used, and the AT gives it a validation code that forms part of the ATCUD of each document (Decreto-Lei 28/2019, art. 35.º). That communication is made by InvoiceXpress using the AT credentials you have configured there; from Odoo it is requested with **Register in the AT**.

The journal

Issue with InvoiceXpress	Checkbox. When an invoice from this journal is confirmed, it is issued in InvoiceXpress, which assigns 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. Credit notes from the journal are issued as NC.
InvoiceXpress series	The series with which this journal issues.
AT validation code	The AT code for that series and that document type. Odoo calculates it, and 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

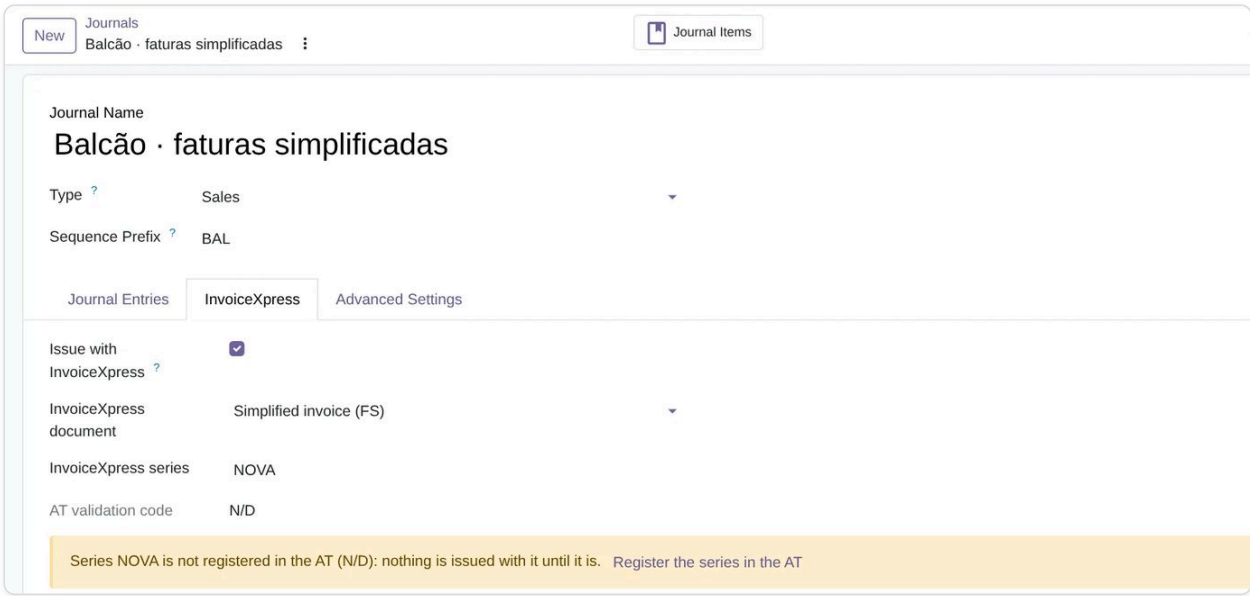
Registered in the AT	Ticked automatically when the series has an AT validation code for all six document types: FT, FS, FR, NC, ND and RG.
Default in InvoiceXpress	Checkbox for the series InvoiceXpress uses by default.
Register in the AT	Button on each series, for accounting managers. Hidden once the series is already registered.
Make default	Button on each series. Hidden when it is already the default.

How to switch on a journal

1. **Open the sales journal**
   Go to its **InvoiceXpress** tab.

2. **Switch on Issue with InvoiceXpress**
   Choose the **InvoiceXpress document** and the series under **InvoiceXpress series**.

3. **Check the AT validation code**
   If the series is not registered, press **Register the series in the AT**.



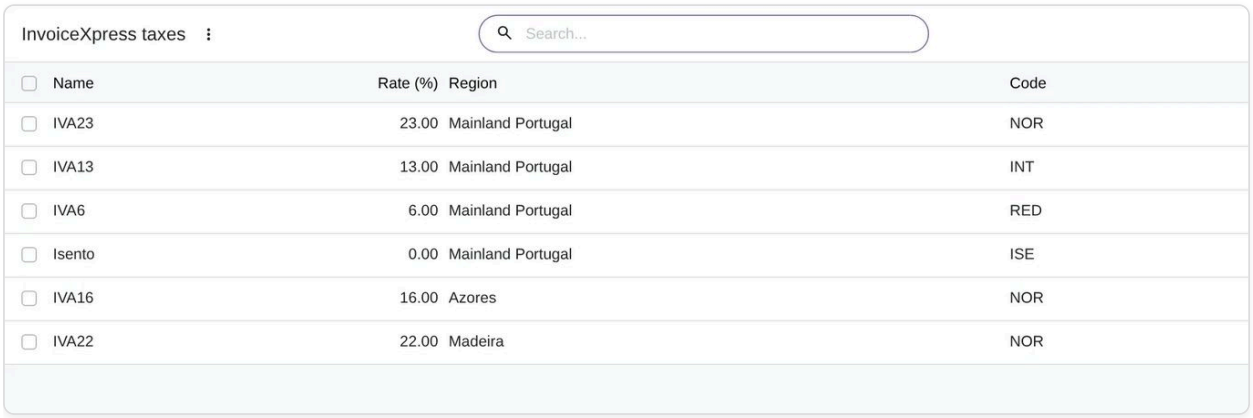
- **Real Odoo 20 screenshot.** A journal with series NOVA not registered with the AT and the button **Register the series in the AT**.

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

9 Taxes

This list shows the InvoiceXpress taxes and is used to match them with your Odoo sales taxes.

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.

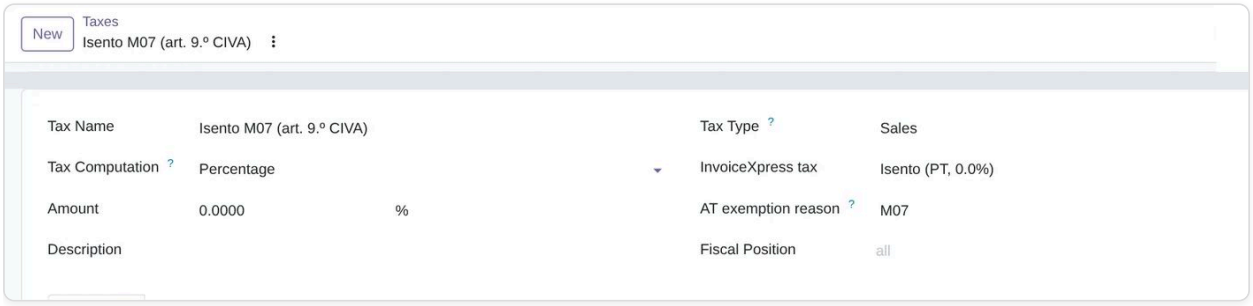


- **Real Odoo 20 screenshot.** The InvoiceXpress tax list with its rate, region and code.

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

On the Odoo tax

InvoiceXpress tax	The InvoiceXpress tax that this sales tax is matched 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, with the name IVA and its rate (IVA23, for example) or Isento if it is 0%. If InvoiceXpress already has one with that name and rate, it matches it without creating another. Only shown 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 there is no match, press Create in InvoiceXpress**
   The tax is created in InvoiceXpress with the name IVA and its rate, or matched with the existing one with that name.

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

USER MANUAL · INVOICEXPRESS

10 Customers and contacts

The connector links each Odoo contact with its InvoiceXpress customer using a fixed code, not by name, so that duplicates are not created.



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

The code sent with each document is the internal reference of the contact. If it has no reference, the connector uses its own ODOO- code followed by the contact's internal number (ODOO-42, for example). Once used, the code is saved and does not change: if you later rename the reference, a second customer is not 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 number. 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 details of a contact in Odoo that is already in InvoiceXpress, 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, looking it up by its code.
Data in InvoiceXpress	Opens the customer's data in InvoiceXpress. Only shown when the contact is already in InvoiceXpress.

Balance in InvoiceXpress	Reads the customer's balance in InvoiceXpress to compare it with Odoo. Only shown when the contact is already in InvoiceXpress.
InvoiceXpress code	The fixed reference of the contact in InvoiceXpress. Read only.
InvoiceXpress client id	The identifier of the client 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 clients and matches them with your contacts.

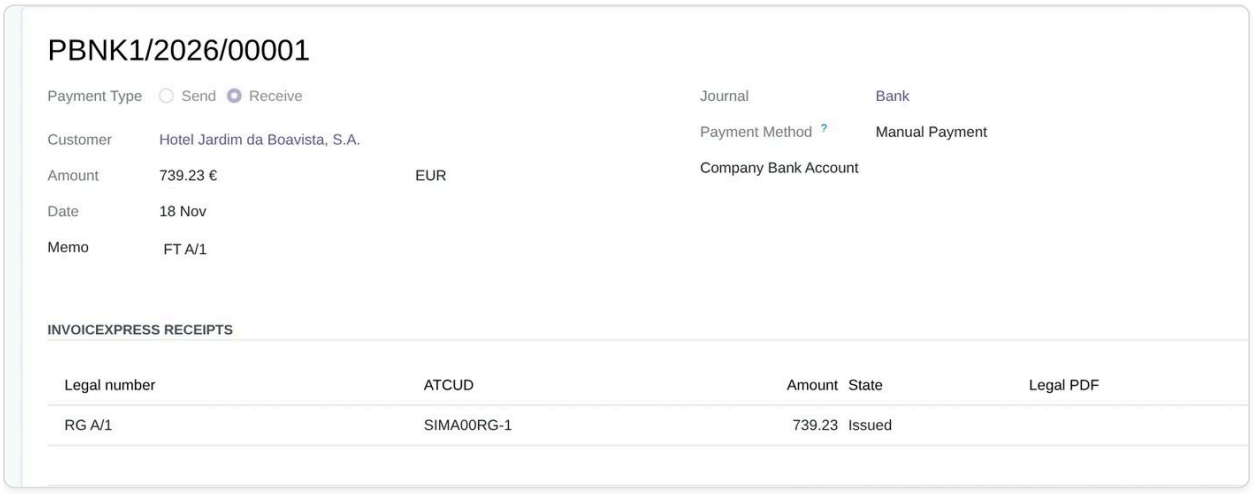
3. **Check the Result**

   It shows what has been linked.

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

11 Payments and receipts

When you register a payment for an invoice issued with InvoiceXpress, the connector issues the receipt in InvoiceXpress, and Odoo later picks up when InvoiceXpress marks the invoice as settled.



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

Where the receipts come from

- The scheduled task **InvoiceXpress: receipts of payments** runs every 15 minutes and issues any missing receipts.
- 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 InvoiceXpress has issued for it.
Update receipts in InvoiceXpress	Button that synchronises the receipts of this payment without waiting for the task.

States

When the receipts cover the whole invoice, InvoiceXpress marks 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 moves 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 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 15-minute task.

3 **Force the sync if needed**

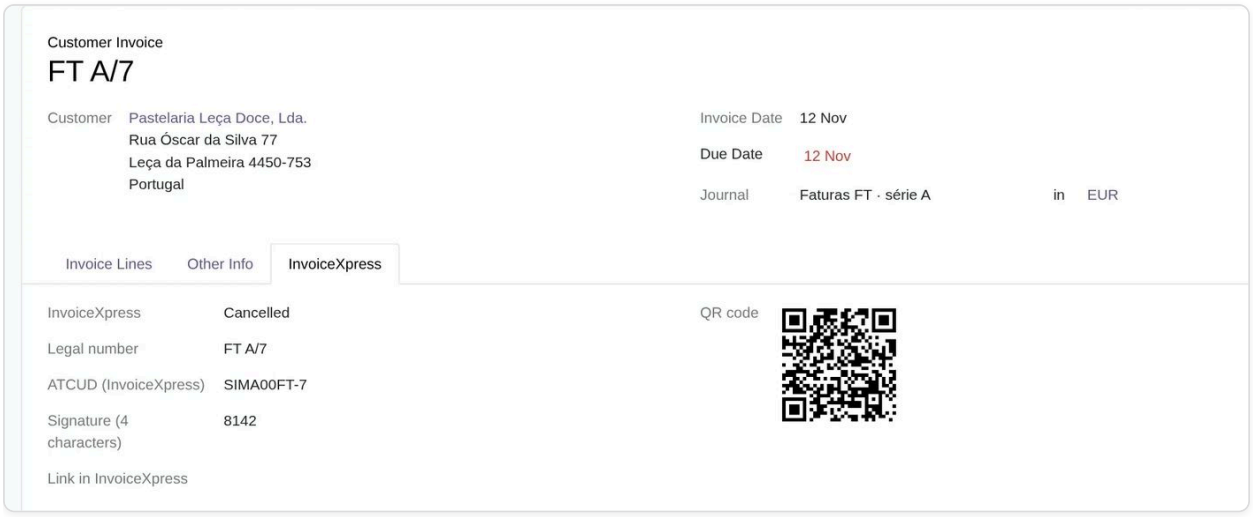
Open the payment and click **Update receipts in InvoiceXpress**.

> The **Update receipts in InvoiceXpress** button can only be used by invoicing users; others get "Only invoicing users can do this."

USER MANUAL · INVOICEXPRESS

12 Cancellations and status

A legal document is cancelled from the Odoo invoice, and the invoice picks up what 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 the legal document in InvoiceXpress and the Odoo entry at the same time. Only accounting managers 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 states

- **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. **Type the reason and click Cancel the legal document**
   InvoiceXpress cancels the document and Odoo cancels the invoice.

> Without a reason, nothing is 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 or get deleted: it keeps its entry in Odoo.

USER MANUAL · INVOICEXPRESS

13 Import from InvoiceXpress

Documents issued from the InvoiceXpress website or app become confirmed invoices in Odoo, marked as issued outside Odoo and not resent.



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

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, enter 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 a 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 has given a link for that document.

Document states

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 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 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 **Issued outside Odoo** filter.

> Documents brought from outside are never resent to InvoiceXpress.

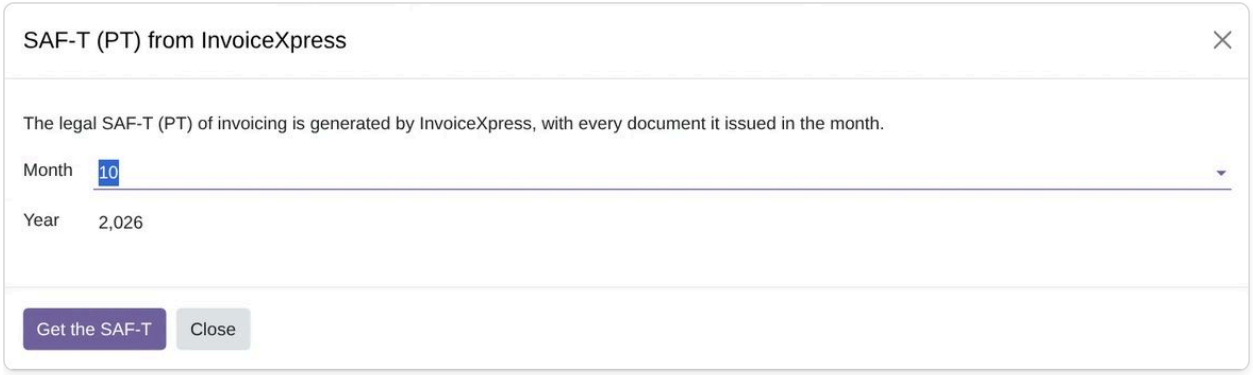
USER MANUAL · INVOICEXPRESS

14 Legal PDF and SAF-T

When you print an invoice issued with InvoiceXpress, the InvoiceXpress legal PDF is used, and the SAF-T (PT) for each month is generated by InvoiceXpress and you download it from Odoo.

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

The connector requests the legal PDF and its QR code right after issuing, and anything not ready is picked up by the task **InvoiceXpress: fetch legal PDFs and QR codes**, every 2 minutes. If you print earlier, Odoo requests it at that moment and, if InvoiceXpress is still generating it, warns 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 **SAF-T (PT) from InvoiceXpress** menu, in the Invoicing reports section, 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 obtained. Only shown if you work with several companies, and it defaults to the active one.
Month	The month of the SAF-T. Required.
Year	The year of the SAF-T. Required.
Get the SAF-T	Requests from InvoiceXpress the SAF-T (PT) for invoicing for that month.
Close	Closes the wizard.

How it is obtained

1. **Open the wizard**
   Go to the **SAF-T (PT) from InvoiceXpress** menu.
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 requests it again a few times.
4. **Download the file**
   When it is ready, the **File** field appears for download. 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 does it with 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.».

15 What happens automatically

The connector ships with six scheduled tasks, all active on installation, which handle pending issues, PDFs, receipts and changes made outside Odoo.

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 and 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 immediately after issuing.
InvoiceXpress: receipts of payments	Every 15 minutes	Compares the payments reconciled in Odoo with the InvoiceXpress receipts: it creates the missing receipt and cancels the one for a reconciliation that has been 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, it sends FlexigoTech Cloud the count of calls made to InvoiceXpress in the last hour and of their errors, with no document or customer data.

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

16 If something goes wrong

The most common cases and where to look in each one.

The connection buttons do nothing or the connector does not talk to InvoiceXpress	The connector needs a FlexigoTech Cloud subscription or the free trial. Without them it cannot communicate with the platform. Check the status in **Settings**, under **FlexigoTech Cloud**.
You see «InvoiceXpress is not configured for …: set the account name and save the API key in Settings > Invoicing > InvoiceXpress.» (InvoiceXpress is not configured for …: enter 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 see «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.» (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 on the real account. Save the key again here if this database is the one that should issue.)	Nothing is sent from a copy. If this database is the one that should issue documents, save the key here again.
You see «Only invoicing users can do this.» or another permissions warning	The action needs a permission your user does not have: invoicing user, accounting manager or administrator, depending on the warning.
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 by itself 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**: every 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 tries again every 5 minutes without using up any of the retries, and the invoice is issued as soon as the service is back.

17 Support

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.

Write to us with any questions. With the Standard plan we reply within 1 working day, and with the Pro plan within 4 working hours. Tell us your Odoo version, the module version and, if there is an error, its full text.

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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