



# DGTAX HOW-TO





# ISSUE AN E-INVOICE WITH THE DGTAX-YOUDOX PORTAL

The central pillar of our e-invoicing system is the DGTAX-YouDOX portal <https://dgtax-en.youdox.it/>.

The portal manages all steps of the process:

- Creation
- Digital signature
- Submission to the authorities
- Digital archiving

The tax / accounting rules for the preparation of e-invoices must always be respected (i.e. sequential numbering, self-invoicing of operations, VAT rate guidelines...); this guide is conceived to provide operating support in the use of the portal.

## COMPILATION KICK OFF

The first step in the process of issuing an electronic invoice to a customer (**public administration** or **private party**) is the creation of the e-invoice itself.

The creation of an e-invoice on DGTAX-YouDOX can be perfected in three alternative ways:

- Manual preparation: which can be done directly from the portal interface;

- Importing of an XML file: an invoice that has previously been generated by an ERP in the legally required XML format can be uploaded onto the portal, for submission.
- Conversion of a PDF invoice: the portal has an add-on feature that allows conversion of PDF files into XML invoices.

The import of an XML invoice and its conversion from PDF are straightforward processes, In this “HOW-TO” guide we will deal in particular with the topic of **manual invoice preparation** (data entry) on the portal.

Log in with your credentials - if you don't have login credentials, reach out to us by filling in this form

<https://www.dgtax.it/en/forms/form-14501/>

To proceed with the creation of an electronic invoice, click on the “**Fill out a new document**” button and access the compilation page



During the initial phase of manual preparation, the DGTAX-YouDOX portal asks you to choose whom the invoice should be addressed to, i.e. whether a private party (individual or company) or a public administration entity.

After the choice has been perfected, the portal leads to the invoice compilation page.

## COMPILATION PAGE STRUCTURE

In spite of many document types being available on the drop down list, companies will typically choose, alternatively, to prepare an **Ordinary private invoice** or a **Public Administration invoice**.

The screenshot shows a window titled 'Document type' with a close button (X) in the top right corner. Inside the window, there are three distinct sections, each with a title, a description, and a small icon of a document with a pencil.

Document type
<b>Ordinary private invoice</b> <ul style="list-style-type: none"><li>Standard invoice format for the issue of electronic invoices to private subjects (B2B).</li></ul>
<b>Simplified private invoice</b> <ul style="list-style-type: none"><li>Simplified invoice format that can be used as an alternative to the ordinary invoice for the issue of invoices to individuals of a total amount not exceeding € 400.00.</li></ul>
<b>Public Administration Invoice</b> <ul style="list-style-type: none"><li>Standard invoice format for the issue of electronic invoices to the Public Administration (PA).</li></ul>

The ordinary e-invoice compilation page consists of 13 sections that group the data to be entered into consistent blocks.

Their compilation follows the logical organisation as described below:

- Some sections are **mandatory**. The details required are **immediately visible**; even within these blocks, however, there may be non-mandatory data. The system typically prompts for mandatory fields.
- Some sections are, instead, **optional**, recommended or conditional on the presence of some items. Initially, **only** the **title** of these sections is visible; their contents can be viewed by clicking on the title of each section.


A side menu is provided in order to move quickly from one section

to another on the compilation page.

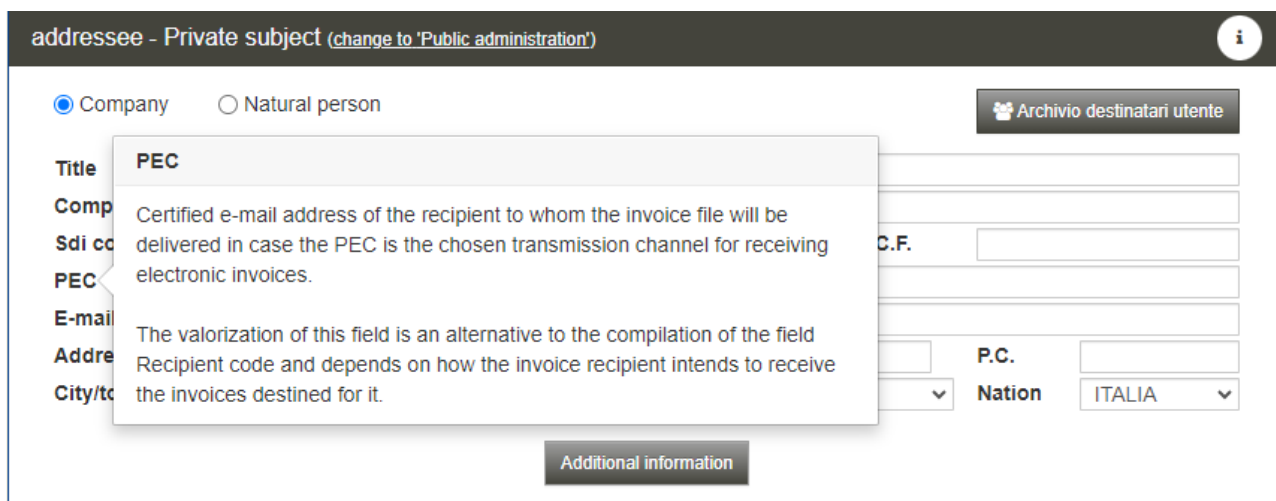
## COMPILATION GUIDELINES

The DGTAX-YouDOX portal provides all the necessary **support tools** for filling out the e-invoice.

These tools are designed to prevent the user from providing inaccurate or inappropriate information and are aimed at supplying the necessary knowledge base to easily carry out the task of filling out the invoice.

On the right-hand side of the title bar of each section, an  button is available, which allows to consult the **information** relating to the relevant section.

Clicking on the title of key fields allows the compiler to view instructions on how to fill them in correctly



addressee - Private subject (change to 'Public administration')

☒ Company ☐ Natural person

Archivio destinatari utente

Title **PEC**

Comp

Sdi co

PEC

E-mail

Address

City/town

C.F.

P.C.

Nation

ITALIA

Additional information

Certified e-mail address of the recipient to whom the invoice file will be delivered in case the PEC is the chosen transmission channel for receiving electronic invoices.

The valorization of this field is an alternative to the compilation of the field Recipient code and depends on how the invoice recipient intends to receive the invoices destined for it.

Users can create their database of client names and products / services, within the respective outgoing sections.

Bank details can be automatically entered on the invoice, as well as payment terms.

Attachments (such as purchase orders, details of projects, etc.) can be appended to the e-invoices.

Finally, e-invoices can be sent to the relevant addressees by activating the “Send courtesy copy” feature and adding the addressees’ email addresses, separated by a semi-column “;” sign.

## INVOICE NUMBERING AND SECTIONAL LEDGERS

The DGTAX-YouDOX portal allows the user to configure the numbering system they wish to maintain for the invoices they create.

Users can choose:

- **free numbering system**: in this case, the user will be able to manually assign the number of the invoices they compile, without format constraints or controls, or
- **automatic numbering system**: by adopting this model, the user relies on an automatic invoice number assignment system, which ensures continuity and progressiveness to the numbering of the invoices issued.

In the case of automatic numbering, the “number” field will always be locked and cannot be filled in.

The number is in fact attributed by the system at the moment when the invoice is confirmed or “sent for signature” at which point the invoice takes its form as an xml file and its content becomes definitive and can no longer be modified.

## DATA CHECK

After completing the e-invoice, in order to check the formal correctness of the data entered, the user may use the “Check

data” button



located at the top right of the

compilation page.

Based on this check, the system will display, at the top of the page:

- a notification of successful check, if the verification activity did not detect any formal error or missing mandatory fields;
- an error alert, specifying the missing field or the field affected by the error or format anomaly, if the verification activity detected problems.

In the event of multiple errors, the system will highlight them one by one to the user, who will have to correct the reported error each time and perform the check repeatedly, until it produces a “successful check” result.

The system controls will only be performed on a sandbox environment base (e.g. if a client VAT registration number is formally correct, the system will confirm its validity; however only after the submission of the e-invoice to the authorities they will confirm if the number is still valid).

## DUPLICATING AN E-INVOICE

The DGTAX-YouDOX portal has a handy invoice duplication function, which duplicates - as a new draft invoice - the contents of an invoice already issued via the portal.

This feature is particularly useful in case of **recurring invoicing** of the same services or goods.

The duplicate function is available on the detail page of each invoice issued (which can be reached by accessing the archive of invoices issued, then clicking on “View” at the invoice you wish to duplicate).



The “Duplicate” function , specifically, is shown at the

top of the detail page of the issued invoice.

By clicking the on “Duplicate” button, the portal will duplicate the contents of such invoice, generating a new draft that includes all the data of the duplicated invoice (except for the invoice number). Starting from this pre-filled draft, the user will be able to modify the needed data only and then quickly proceed to finalize the process.

## OTHER BUTTONS

After successfully checking the data entered and saving the draft, three new buttons will be added to the commands previously present:

- **Visualize draft**: allows you to view the draft of the document being compiled according to the simplified style sheet provided by the Inland Revenue.
- **Delete draft**: allows you to delete the draft of the current document.
- **Submit**: command visible only to users who have delegated the signature operation (automatic at the portal). Allows the user to activate the automatic process of creation of the xml, automatic signature, transmission to the SDI and sending to the addressee.

**FOR MORE INFORMATION PLEASE CONTACT**

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