MIDbridgeX®

Setup Guide

Setting up e-invoicing in Chargebee with MIDbridgeX

Step by step: connect MIDbridgeX as your e-invoicing provider in Chargebee, activate country and format, and attach the e-invoice to your invoice emails.

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AUDIENCE
Administrators of Chargebee and MIDbridgeX

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1 Overview and prerequisites

With the “MIDbridgeX E-Invoicing” app, Chargebee delegates the generation of your e-invoices to MIDbridgeX. Chargebee hands over every invoice that is ready for billing, MIDbridgeX generates the e-invoice, and Chargebee retrieves it and sends it with the invoice email.

Most of the setup takes place in Chargebee; in MIDbridgeX an access key is generated and a few switches are set – **we carry out these steps in MIDbridgeX as administrators together with you**; you do not have access to them yourself. Allow 15 to 30 minutes. This guide uses Germany and the Factur-X/ZUGFeRD format as the example.

You will need

- Administrator rights in your Chargebee site
- A Chargebee API key for your site (for the connection in MIDbridgeX)
- Complete company data in MIDbridgeX: name, address, phone, email, tax number or VAT ID, IBAN

Good to know

- Set everything up on your Chargebee **test site** first, and only then on the live site.
- Labels in Chargebee may change slightly with new Chargebee releases.
- If mandatory data is missing, no e-invoice is generated – the reason is shown directly on the invoice in Chargebee.

2 Prepare MIDbridgeX

Can only be carried out together with a MIDbridgeX administrator. The settings in MIDbridgeX can only be reached with administrator access. You **cannot carry out** these steps yourself – they are made **together with us**, the administrators at MID Technologien.

The settings are located in MIDbridgeX under Settings → General Settings → **E-invoicing**.

1. Set **E-invoicing route** to **Chargebee E-Invoice**. Only then do the remaining fields of this section appear.
2. Under **Access for Chargebee**, click **Generate key** and copy the key right away. It is shown only this once; if you lose it, generate a new one. You do not need to enter an address anywhere – the key alone determines which instance responds.
3. Under **Link back to Chargebee**, select the **Chargebee connection** – an ordinary REST connection using your site’s API key. If it does not exist yet, create it under *Connections* first.
4. Switch on **Report status to Chargebee**. Without this report, Chargebee never retrieves the finished e-invoice, and the invoice stays “in progress” there.

5 Check **Offered formats** and **Countries (comma separated)**: the country you activate in Chargebee (here `DE`) must be in the list.

3 Connect the app in Chargebee

In Chargebee, open **Apps** in the left-hand menu. If the app is not connected yet, find it via **Go to Marketplace**; when connecting, Chargebee asks for the API key – enter the key from step 2 there.

1. Under **Apps connected**, click the **MIDbridgeX E-Invoicing** app (labelled "Sandbox" on the test site).

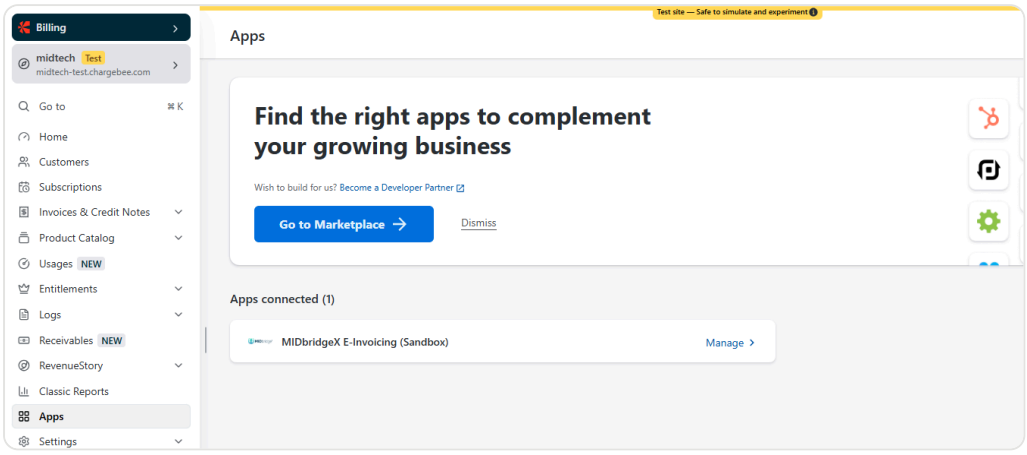


Figure 1 – The connected app under "Apps connected".

2. Chargebee confirms that the integration is active. Click **Go to E-invoicing**.

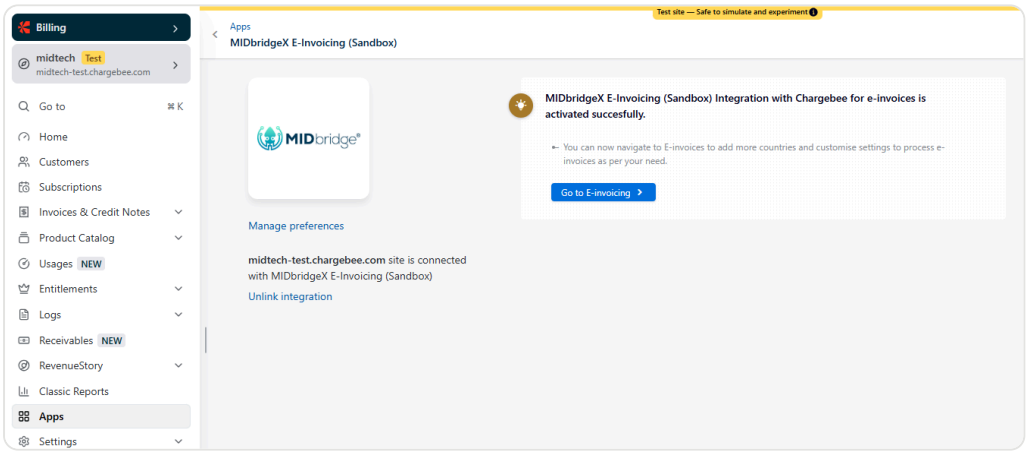


Figure 2 – Integration active; continue to the e-invoicing settings.

4 Activate country and format

In Chargebee, e-invoicing is enabled per tax country. For each country you then choose the provider and the format (“model”).

3 Click **Add Country**, search for your country (here *Germany*), tick it and confirm with **Continue**.

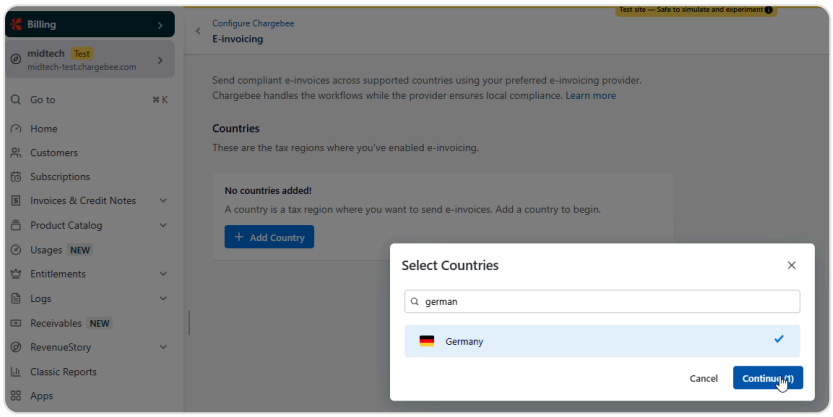


Figure 3 – Adding a country.

4 Click **Manage** next to the added country. A country marked *Setup pending* has no provider and format yet; a fully configured country carries the *Active* badge.

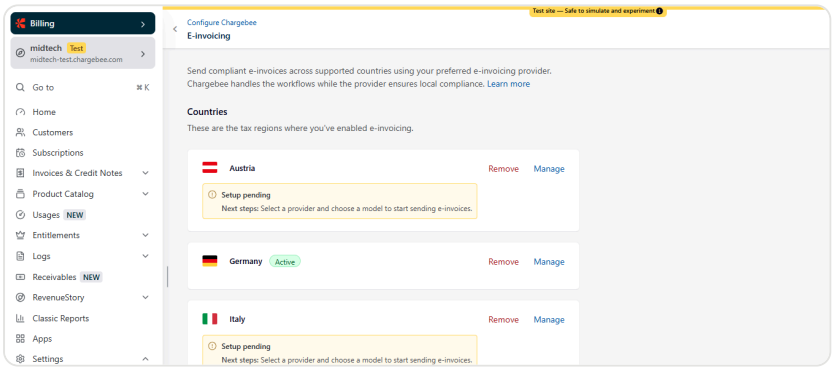


Figure 4 – Country overview: Germany is active, Austria and Italy are still awaiting setup.

5 Under **Models** you will see the *Zugferd* format with the documents *zugferd-invoice* (invoice) and *zugferd-creditnote* (credit note). Click the three dots to the right of *zugferd-invoice* and choose **Manage**.

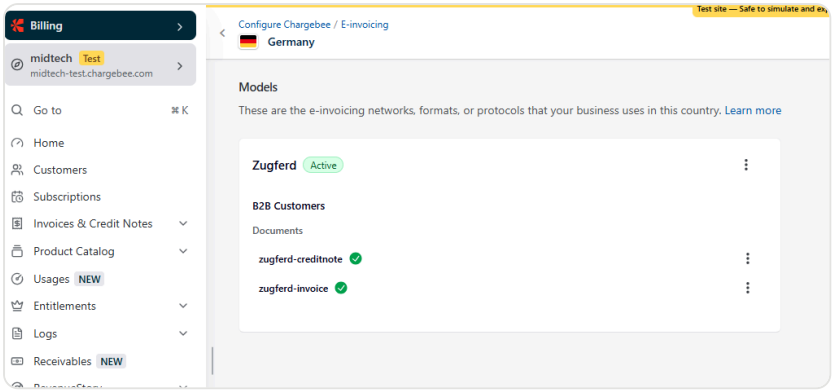


Figure 5 – Zugferd format for B2B customers with the invoice and credit note documents.

5 Define the condition

The condition determines for which documents Chargebee requests this e-invoice from MIDbridgeX.

6 Set up the condition as shown and click **Save and exit**:

	Field	Operator	Value
WHEN	Taxable Address Country	equals	DE
AND	Document Type	equals	Invoice

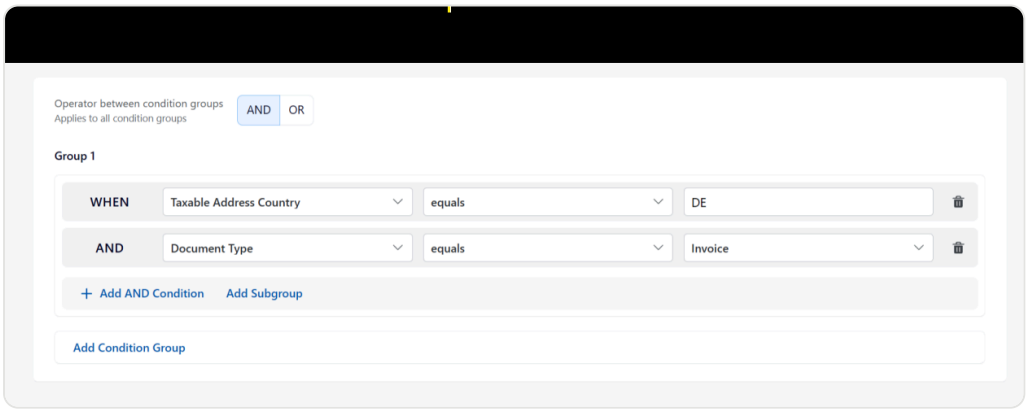


Figure 6 – Condition for zugferd-invoice: tax country Germany and document type invoice.

Credit notes. Set up *zugferd-creditnote* the same way; there, choose the credit note (*Credit Note*) as the *Document Type*. Once both documents are configured, they show a green tick in the overview (figure 5).

6 Per-format settings in MIDbridgeX

> **Can only be carried out together with a MIDbridgeX administrator.** These settings also require administrator access to MIDbridgeX and are made together with us – you cannot change them yourself.

Back in MIDbridgeX under Settings → General Settings → **E-invoicing**, the **Per format** block defines what happens after generation. For this setup:

Per format	Factur-X / ZUGFeRD	XRechnung	Peppol BIS Billing 3.0
Chargebee PDF as basis	off	off	off
Also send Chargebee PDF to DATEV	off	off	off
Trigger sending in Chargebee	on	on	on

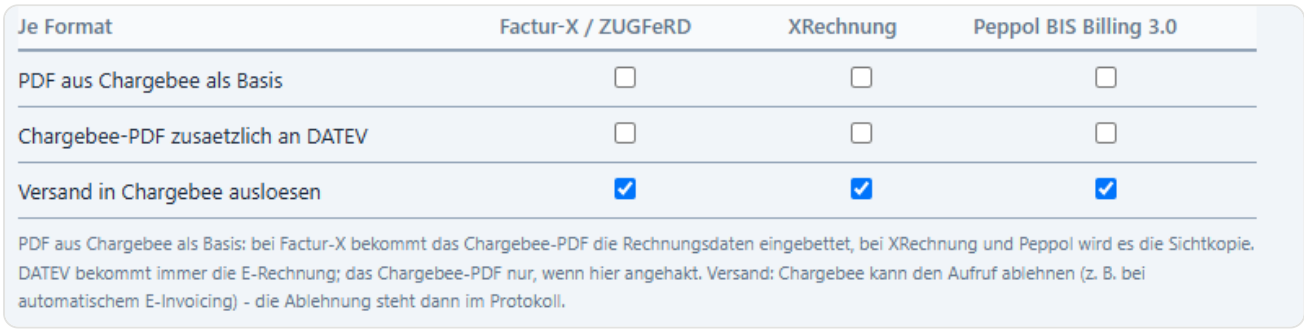


Figure 7 – The block in MIDbridgeX (shown with the German user interface).

- **Chargebee PDF as basis** off: MIDbridgeX renders the PDF in its own layout from the document designer. When switched on, Factur-X embeds the invoice data into your usual Chargebee PDF instead.
- **Also send Chargebee PDF to DATEV** off: DATEV always receives the e-invoice; the Chargebee PDF only if ticked here.
- **Trigger sending in Chargebee** on: after the status report has been confirmed, MIDbridgeX triggers sending in Chargebee. If Chargebee rejects the call (e.g. with automatic e-invoicing), the rejection is recorded in the log.

7 Attach the e-invoice to invoice emails

For your customers to receive the e-invoice with the invoice email, Chargebee has to attach it.

1. In Chargebee, open Settings → Configure Chargebee → Email notifications → **Invoice receipt**.
2. Click **EDIT** next to **Invoice is generated**.
3. Under **Email Options**, tick **Attach invoice or e-invoice if available** and save.

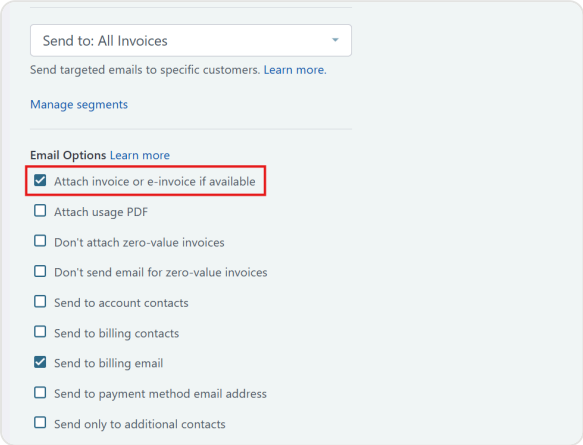


Figure 8 – The e-invoice is attached as soon as it is available; otherwise the regular invoice.

> **Recipients.** Leave the other options (e.g. *Send to billing email*) as you have used them so far. This setting only changes the attachment, not who receives the email.

8 Testing and verification

On the test site, create an invoice for a customer with a German billing address and check:

Where	What you should see
Chargebee, on the invoice	The e-invoice status changes from "in progress" to successful; the e-invoice can be downloaded.
Invoice email	The attachment is the e-invoice (PDF with embedded `factur-x.xml`).
MIDbridgeX, log Chargebee e-invoicing	Submission, status report and retrieval of the document.
MIDbridgeX, record tree	The e-invoice is attached to the document (after the next document import).

Troubleshooting

- **Invoice stays “in progress”:** `Report status to Chargebee` is off, or the `Chargebee connection` is missing or has an invalid API key.
- **Status “FAILED” on the invoice:** mandatory data is missing (usually phone, email or tax number in the company data, or an incomplete customer address). The reason names the missing field.
- **Chargebee reports “PENDING” for the country:** seller data is missing; Chargebee lists it in plain text.
- **The log in MIDbridgeX stays empty:** the key in Chargebee does not match the one generated last, or `E-invoicing route` is not set to `Chargebee E-Invoice`.

> **Before going live:** repeat the same steps on the live site – using the key of the MIDbridgeX instance that is to serve your live site. We will again carry out the steps in MIDbridgeX together with you.

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