

Mexico Localization



The Mexico Localization is a solution developed by AlfaPeople, designed specifically to meet Mexico's tax requirements. This solution facilitates configuration within Microsoft Dynamics 365 Business Central, enabling the management, calculation, and reporting of tax and accounting information, ensuring compliance with SAT (Tax Administration Service) regulations.

This document details the features covered by the Mexico Localization for Business Central (BC). Requirements not specified in this document are considered outside the current scope of this localization.

At AlfaPeople, we are dedicated to providing the best solutions to our customers. We are leaders in Latin America in the design of business solutions, including localization for different countries. Our experience and commitment to quality allow us to offer a solution that not only complies with legal requirements but also improves the efficiency and productivity of your company.



Architecture

The Mexico Localization for Microsoft Dynamics 365 Business Central is part of AlfaPeople's Latin America-wide localization strategy.

It can be implemented independently in a dedicated tenant for Mexico or jointly with other country localizations within the same tenant, enabling centralized management of multi-country operations.

Built on the international (W1) version of Business Central, it offers a flexible, standardized architecture aligned with global best practices.

Unlike other localizations, this solution supports both standalone and integrated deployments,

offering regional unification. This multi-country capability in a single instance reduces operational costs, streamlines administration, and accelerates financial consolidation, providing a key advantage for businesses with a regional footprint.

Key benefits:

- **Regulatory compliance:** Ensures your company meets the latest tax and accounting requirements established by SAT.
- **Seamless integration:** Natively integrates with Microsoft Dynamics 365 Business Central, providing a consistent user experience and full compatibility with standard BC features.
- **Operational efficiency:** Automates tax and accounting processes, reducing administrative burden and minimizing human error.
- **Reporting made easy:** Simplifies access to reports, delivering the information needed for monitoring and decision-making.
- **Continuous updates:** AlfaPeople ensures the solution is always aligned with the most recent regulatory changes.
- **Local support:** As a regional leader, we offer specialized support and in-depth knowledge of local regulations.

PROCESS	FUNCTIONALITY	DESCRIPTION
Localization Management	Configuration of different types of billing documents	Document type that allows you to control the nature, module, and serial number.
Localization Management	Tax Regime Classification	Defines the tax classification for each document according to Mexican regulations.
Localization Management	Points of sale	Points of sale for issuing invoices.
Localization Management	States	Status codes, cities, and postal codes.
Localization Management	SAT account catalog	Assignment of SAT codes to accounting accounts for electronic accounting issuance.
Localization Management	Identification number (RFC)	Assignment of identification numbers (RFC) to customers and suppliers.
Location configuration	RFC control	RFC validation based on the selection of a legal entity or individual taxpayer.
Localization Management	CFDI use validation	Validation of CFDI catalog use by tax regime.
Location configuration	Document numbering	Establish document numbering settings according to SAT rules.
Location configuration	Standard VAT configuration	Standard VAT settings according to Mexican regulations.
Localization Management	ISR withholding	Allows you to configure percentages and define accounting accounts for calculating income tax withholding.
Location configuration	VAT withholding	Allows you to configure percentages and define accounting accounts for calculating VAT withholding.
Location configuration	Additional taxes	Allows configuration of rates and accounts for additional taxes required by SAT, such as IEPS.
Accounting / Taxes	Accounting reclassification VAT	Automatic accounting reclassification for realized and unrealized VAT.
Accounting / Taxes	VAT movement analysis	Additional reports that allow you to analyze VAT movements.
Accounting / Taxes	Withholding movement analysis	Additional reports that allow you to analyze withholding movements.
Accounting / Taxes	Re-numbering of documents	Modification of document numbering.

PROCESS	FUNCTIONALITY	DESCRIPTION
Accounting / Taxes	Electronic Accounting – Chart of Accounts	Account catalog.
Accounting / Taxes	Electronic Accounting – Chart of Accounts	Accounting policy.
Accounting / Taxes	Electronic Accounting – Chart of Accounts	Trial balance.
Accounting / Taxes	Electronic Accounting – Chart of Accounts	Assistant for tax voucher reconciliation.
Accounting / Taxes	Electronic Accounting – Chart of Accounts	Account and subaccount assistant.
Accounting / Taxes	Configure DIOT v2025 report	Configuration of supplier data and column mapping for generating the DIOT 2025 report.
Accounting / Taxes	DIOT v2025 report	Issuance of DIOT report version 2025.
Electronic invoicing	Electronic invoicing	Integration of CFDI 4.0 electronic invoicing with Gosocket.
Electronic invoicing	Electronic invoicing integration	CEPDI electronic PAC integration.
Electronic invoicing	Download XML file Electronic invoice	Download XML file Issued electronic invoice.
Electronic invoicing	Download XML file Electronic credit note	Download XML file Electronic credit note issued.
Electronic invoicing	CFDI issuance with extended descriptions	Integration of extended descriptions in CFDI invoices and electronic credit notes.
Electronic invoicing	CFDI replacement method	Allows correction of original CFDI errors through re-invoicing for previously declared periods.
Electronic invoicing	CFDI cancellation method	Allows you to request CFDI cancellation from SAT for invoices, credit notes, and payment supplements.
Electronic invoicing	Import declaration	Issuance of CFDI with import declaration information.

PROCESS	FUNCTIONALITY	DESCRIPTION
Electronic invoicing	Issuing invoices with multiple electronic advance payments	Issuance of electronic invoices linking multiple advance payments.
Electronic invoicing	Electronic credit note for electronic advance payments	Issuance of credit notes applicable to invoices with multiple advance payments.
Electronic payment	Electronic payment supplement	Issuance of electronic payment supplement from customer transactions.
Electronic Payment	Payment supplement - Asynchronous XML cancellation with the SAT	XML cancellation of payment supplements based on the asynchronous process defined by SAT.
Electronic Payment	Cancellation status query	XML cancellation status query from BC.
Electronic Payment	Control for electronic payment issuance	If the invoice is paid using PUE, the generation of payment supplements is blocked.
Electronic invoicing	CFDI configuration Waybill	The document type information is integrated into the Waybill module.
Electronic invoicing	CFDI transfer issuance Waybill for shipments to customers	Issuance of CFDI transfer for shipments to customers.

More information

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