

# Sisukord

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# KSEF 2026

## 1. Settings

### • Master Settings

- **MANDATORY** Master Settings→Sale settings→e-invoice sending is choosable on invoice - **yes**
- **MANDATORY** Master Settings→Common settings→Transport parameter types to printout append the transport parameter type **SAFT\_JPK**
- **MANDATORY** Master Settings→Common settings
  - Company legal address
  - Company legal name
  - Company VAT no (only numbers)
- Master Settings→Transport→Polish e-invoice (KSeF) sending delay in hours (0-24) - the interval of sending information to KSEF after invoice confirmation is:
  - if **0** or empty → 0-15 minutes (**by default**)
  - otherwise → hour in setting + (0 – 15) minutes (the value is specified without minutes)
  - if the setting Invoice datafield for external invoice number is used - the time is calculated from the latest confirmed invoice, where the value of the data field matches.
- **MANDATORY** Master Settings→Transport→Polish e-invoice (KSeF) authentication token - generated token number from KSEF for integration
  - In KSEF **Select the role to which the token is assigned** added rights:
    - access invoices
    - issue invoices



KSEF page information: To check the status of shipping a token, go to the **List of tokens** tab.  
**Attention!** The token number is displayed only once. Please save it before leaving the page.

Menu

- Issue invoice
- Invoice list
- Session history
- Attorney power
- Tokens
- Generate token**
- Token list
- Subsidiary units

## Token generation

The generated token should be used for the API in order to establish a connection.

**Custom token name \***

DIRECTO

The maximum number of characters is 256.

**Select the role to which the token is assigned \***

- access invoices
- issue invoices
- view permissions
- managing permissions

Menu

## Token generation

Successfully completed

Your token has been successfully generated.

To check the status of shipping a token, go to the "List of tokens" tab.  
Attention! The token number is displayed only once. Please save it before leaving the page.

Token number: XXXXXXXXXXXXXXXXX

**Copy**

Token list Generate another token

Master Settings > Transport

Search results "authentication token":

Menu (38)

- Stockmovements (REP)
- Stockmovements
- Stock Takings List (REP)
- Stock Takings
- Stock Receipts List (REP)
- Stock receipts
- Stock orders (REP)
- Stock Orders
- ...
- Show all results

System settings (1)


TRANSPORT

Polish e-invoice (KSeF) authentication token: XXXXXXXXXXXXXXXXX

Save

- Master Settings→Receipt settings→Invoice datafield for external invoice number - if invoice No. must be taken from sales invoice datafield - choose correct datafield with the invoice No. **By default** it is empty and document No. is from sales invoice header field **Invoice**
- **Common settings**
  - Sales invoice dates in tags P\_1 and P\_6 are according to settings: SETTINGS → COMMON

## SETTINGS → TRANSPORT PARAMETERS:


- CODE - DataWystawienia
- TYPE - SAFT\_JPK
  - If PARAMETER 2 has value **2**, information should be:
    - **Date** → P\_6 (*Description: Data dokonania lub zakończenia dostawy towarów lub wykonania usługi*)
    - **Sent** → P\_1 (*Description: Data wystawienia*)
  - Otherwise, if PARAMETER 2 has value **1** or the value is empty or the transport parameter does not exist, information should be:
    - **Date** → P\_1 (*Description: Data wystawienia*)
    - **Sent** → P\_6 (*Description: Data dokonania lub zakończenia dostawy towarów lub wykonania usługi*)
- **Finance settings**
  - **MANDATORY VAT code** (Setting→Finance Settings→VAT codes)
    - VAT% (**by default**)
    - datafield **KSEF Stawka podatku** (code: KSEF\_STAW\_PODAT) if needed
- **Customer card:**
  - **MANDATORY** Name
  - **MANDATORY** Street
  - **MANDATORY** Country
  - City (can be empty)
  - Postal code (can be empty)
  
  - Vat reg no - without country code, otherwise **BRAK** (can be empty) (  must be without country code)

## 2. Sending



In KSEF there is no checking of duplicates.

### 2.1. Sending of the invoice

IF sales invoice should be sent to KSEF before confirming, checkbox in sales invoice document **e-sending** should be marked.  It will be marked automatically.

Close New Refresh Confirm Save Status: Changed

Bulk Insert...

Invoice 2023

Customer Asset Budget

Ordered by Survey

Date 27.11.2023 8:10:17 Cust rep Stock PAGRINDINIS

Pay term Our ref Directo HELP Object BUH

Due date Salesman META Project PAJAM\_SUTARTIS

Trans date 27.11.2023 8:10:17 In charge Order no.

Cust order Quotation Credited invoice

Sent 27.11.2023 8:10:17 Type Status (choose status)

Comm.

Update stock

e-sending

After confirm the invoice there will be mark: **Waiting for electronic dispatching : KSEF-E-INVOICE 24.11.2023 11:25:14** and checkbox **e-sending** will not be marked.

When the invoice will be send to KSEF, mark will have KSEF document No: **Electronically dispatched : KSEF-E-INVOICE 111111111-20231127-0ACC7EDA1280-69 27.11.2023 8:12:01**

KSEF No. 111111111-20231127-0ACC7EDA1280-69

<p>Close New Copy Save Mail Print Preview Sign test_parasas Sign test2</p> <p>Receipt CashIn Event Bulk Insert... Add Stock Level</p> <p>Invoice 2300083</p> <p>Customer KSEF KSEF test</p> <p>Ordered by</p> <p>Date 22.11.2023 13:52:49 Cust rep St</p> <p>Pay term 0 Our ref Directo HELP Ob</p> <p>Due date 22.11.2023 Salesman META Pro</p> <p>Trans date 22.11.2023 13:52:49 In charge Order</p> <p>Cust order Quotation Credited inve</p> <p>Sent 22.11.2023 13:52:49 Type Sta</p> <p>Comm.</p> <p>Receipts: - Credit invoices: 2300084</p> <p>Last changed by: META 27.11.2023 8:18:58 Last printed 27.11.2023 8:18:58</p> <p>Waiting for electronic dispatching : KSEF-E-INVOICE 27.11.2023 8:18:58</p> <p>Currency: EUR Total weight: 1108.2528 VAT: 55.82 Subtotal: 2713.00</p>	<p>Close New Copy Save Mail Print Preview Sign test_parasas Sign test2</p> <p>Receipt CashIn Event Bulk Insert... Add Stock Level</p> <p>Invoice 2300092</p> <p>Customer KSEF KSEF test Asset</p> <p>Ordered by Survey</p> <p>Date 24.11.2023 11:24:54 Cust rep Stock PAG</p> <p>Pay term 10 Our ref Directo HELP Object BUH</p> <p>Due date 04.12.2023 Salesman META Project PAJ</p> <p>Trans date 24.11.2023 11:24:54 In charge Order no.</p> <p>Cust order Quotation Credited invoice</p> <p>Sent 24.11.2023 11:24:54 Type Status (cho</p> <p>Comm.</p> <p>Receipts: -</p> <p>Last changed by: META 24.11.2023 11:25:14 Last printed 24.11.2023 11:25:14</p> <p>Electronically dispatched : KSEF-E-INVOICE 111111111-20231127-0ACC7EDA1280-69 27.11.2023 8:12:01</p> <p>Currency: PLN Total weight: 711.4626 VAT: 138.67 Subtotal: 1606.45</p>
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## 2.2. Errors

While confirming of the invoice, Directo checks if the settings are filled correctly. If there is something incorrect - there is no possibility to confirm the invoice with checkbox **e-sending**. You may confirm invoice with out the checkbox **e-sending** - it will not be send to KSEF.

For example, in the picture we see error message.

The error is in field AdresL1

In wiki part **3. Sales invoices tags** you have to find AdresL1 field and check the setting according to the description:

Name	Description
<b>Podmiot1</b>	Information about the seller
Adres/AdresL1	Setting→Master Settings→Company legal address
<b>Podmiot2</b>	Information about the buyer

Name	Description
Adres/AdresL1	Customer fields: <b>Street, City, Postal code</b>

Confirming check.  
 Invoice needs to be sent as e-invoice, but sender/customer/invoice contains data that does not validate - XSD version: KSeF\_FA2  
 XML Validation: Invalid simple type value: ". Location: /\*:Faktura[1]/\*:Podmiot2[1]/\*:Adres[1]/\*:AdresL1[1]  
 Invoice is not confirmed!  
[Back](#)

If you are using datafield for invoice No. - some errors may be seen in document after confirmation:

The screenshot shows a software interface for invoice management. At the top, there are buttons for 'Close', 'New', 'Copy', 'Save', 'Mail', 'Print', 'Preview', 'Sign test\_parasas', 'Sign test2', 'Transaction', 'Unconfirm', and 'Status'. Below these are buttons for 'Receipt', 'CashIn', 'Event', 'Bulk Insert...', and 'Add Stock Level'. The main area displays invoice details for 'Invoice 2300110' with fields for Customer (KSEF), Asset, Budget, and Credit rating. It also shows a date of 29.11.2023 and a status of '(choose status)'. A red box highlights an error message: 'Waiting for electronic dispatching : KSEF-E-INVOICE 29.11.2023 9:00:17. Another invoice with same external invoice number already sent.' At the bottom, there is a summary table with columns for Rate, Qty, Base, Total, Subtotal, Prepayment, and Balance.

Rate	Qty	Base	Total	Subtotal	Prepayment	Balance
1	-6	-27.00	-30.20	-27.00	0.00	0.00

### 3. KSeF report

KSeF report is in Main menu→Finance→REPORTS→KSeF report

In report are only sales invoices documents that:

- Are confirmed
- Are marked **e-sending**

Filters:

- **From** and **Until** - invoice date according invoice field **Date**
- **Number** - invoice No. (if datafield is used - datafield invoice No.)
- **Customer** - customer code
- **Has external ID?::**
  - **Yes** - invoices that has KSeF No.
  - **No** - invoices that has not KSeF No. Invoices may have some errors or are in sending progress




### Report information:










Invoice number	Customer	KSeF number	Verification link	acquisitionTimestamp
Directo invoice No	Customer code	KSeF number	Is the same as QR code informatio - opens GOV page <b>Access to invoices→Invoice information</b> Example: <a href="https://ksef-test.mf.gov.pl/web/verify/1111111111-20231220-CFD9D7DC1724-5F/mlwHL9kQOqrT82nK7IVw5Xvuhxtn7KAhz7vxYISOXY4%3D">https://ksef-test.mf.gov.pl/web/verify/1111111111-20231220-CFD9D7DC1724-5F/mlwHL9kQOqrT82nK7IVw5Xvuhxtn7KAhz7vxYISOXY4%3D</a>	Date and time when the KSEF No. was receive

## 4. Sales invoices tags







Name	Description
<b>Naglowek</b>	
KodFormularza	<b>FA (3)</b> , kodSystemowy=„FA (3)“ wersjaSchemy=„1-0E“
WariantFormularza	<b>3</b>
DataWytworzeniaFa	Current date at time of sending
SystemInfo	<b>Directo</b>


Name	Description
<b>Podmiot1</b>	<i>Information about the seller</i>
DaneIdentyfikacyjne/NIP	Setting→Master Settings→Common settings→Company VAT no
DaneIdentyfikacyjne/Nazwa	Setting→Master Settings→Common settings→Company legal name
Adres/KodKraju	Setting→Master Settings→Special→Country
Adres/AdresL1	Setting→Master Settings→Company legal address

Name	Description
<b>Podmiot2</b>	<i>Information about the buyer</i>
<b>DaneIdentyfikacyjne</b>	<b>Buyer identification details</b>
NIP	If in customer field <b>Country</b> code is <b>PL</b> and field <b>Vat reg no</b> is not empty or filed with value <b>BRAK</b> - customer field <b>Vat reg no</b> , otherwise - tag is not displayed (  must be without country code)
KodUE	If in customer field <b>Country</b> code is not <b>PL</b> and field <b>Vat reg no</b> is not empty or filed with value <b>BRAK</b> - customer field <b>Country</b> code, otherwise - tag is not displayed
NrVatUE	If tag DaneIdentyfikacyjne/KodUE is displayed, customer field <b>Vat reg no</b> , otherwise - tag is not displayed (  must be without country code)
BrakID	If customer field <b>Vat reg no</b> is empty or filed with value <b>BRAK</b> - <b>1</b> , otherwise - tag is not displayed
Nazwa	Customer field <b>Name</b>
<b>Adres</b>	<b>Address details</b>
KodKraju	Customer field <b>Country</b>
AdresL1	Customer fields: <b>Street, City, Postal code</b>
JST	 <b>Fix Me!</b> Possible values: 1 or 2. Znacznik jednostki podrzędnej JST. Wartość „1“ oznacza, że faktura dotyczy jednostki podrzędnej JST. W takim przypadku, aby udostępnić fakturę jednostce podrzędnej JST, należy wypełnić sekcję Podmiot3, w szczególności podać NIP lub ID-Wew i określić rolę jako 8. Wartość „2“ oznacza, że faktura nie dotyczy jednostki podrzędnej JST

Name	Description
GV	 <b>Fix Me!</b> Possible values: 1 or 2. Znacznik członka grupy VAT. Wartość „1” oznacza, że faktura dotyczy członka grupy VAT. W takim przypadku, aby udostępnić fakturę członkowi grupy VAT, należy wypełnić sekcję Podmiot3, w szczególności podać NIP lub ID-Wew i określić rolę jako 10. Wartość „2” oznacza, że faktura nie dotyczy członka grupy VAT
Name	Description
Podmiot3	Information about the third party - required when <b>JST</b> = 1 or <b>GV</b> = 1
Dane identyfikacyjne	Identification details of the third party
NIP	 <b>Fix Me!</b>
IDWew	 <b>Fix Me!</b>
KodUE	 <b>Fix Me!</b>
NrVatUE	 <b>Fix Me!</b>
KodKraju	 <b>Fix Me!</b>
NrID	 <b>Fix Me!</b>
BrakID	 <b>Fix Me!</b>
Nazwa	 <b>Fix Me!</b>
Rola	8 - when <b>JST</b> = 1 10 - when <b>GV</b> = 1
Name	Description
Fa	
KodWaluty	Invoice header field <b>Currency</b>
P_1	According settings: SETTINGS → COMMON SETTINGS → TRANSPORT PARAMETERS:, CODE - <b>DataWystawienia</b> <i>Description: Data wystawienia, z zastrzeżeniem art. 106na ust. 1 ustawy</i>
P_2	According mastersettings Master Settings→Receipt settings→Invoice datafield for external invoice number selected datafield, if not selected from invoice header field <b>Invoice</b>
P_6	According settings: SETTINGS → COMMON SETTINGS → TRANSPORT PARAMETERS:, CODE - <b>DataWystawienia</b> <i>Description: Data dokonania lub zakończenia dostawy towarów lub wykonania usługi lub data otrzymania zapłaty, o której mowa w art. 106b ust. 1 pkt 4 ustawy, o ile taka data jest określona i różni się od daty wystawienia faktury. Pole wypełnia się w przypadku, gdy dla wszystkich pozycji faktury data jest wspólna</i>
P_13_1	Sum of invoice row fields <b>Total</b> where VAT code VAT% is 23% or 22%
P_14_1	Sum of invoice row differences of fields <b>RS VAT - Total</b> where VAT code VAT% is 23% or 22%
P_14_1W	If invoice header field <b>Currency</b> is not <b>PLN</b> = <b>P_14_1</b> value * invoice header field <b>Rate</b> , otherwise - tag is not displayed

Name	Description
P_13_2	Sum of invoice row fields <b>Total</b> where VAT code VAT% is 8% or 7%
P_14_2	Sum of invoice row differences of fields <b>RS VAT - Total</b> where VAT code VAT% is 8% or 7%
P_14_2W	If invoice header field <b>Currency</b> is not <b>PLN</b> = <b>P_14_2</b> value * invoice header field <b>Rate</b> , otherwise - tag is not displayed
P_13_3	Sum of invoice row fields <b>Total</b> where VAT code VAT% is 5%
P_14_3	Sum of invoice row differences of fields <b>RS VAT - Total</b> where VAT code VAT% is 5%
P_14_3W	If invoice header field <b>Currency</b> is not <b>PLN</b> = <b>P_14_2</b> value * invoice header field <b>Rate</b> , otherwise - tag is not displayed
P_13_4	Sum of invoice row fields <b>Total</b> where VAT code VAT% is 4% or 3%
P_14_4	Sum of invoice row differences of fields <b>RS VAT - Total</b> where VAT code VAT% is 4% or 3%
P_14_4W	If invoice header field <b>Currency</b> is not <b>PLN</b> = <b>P_14_4</b> value * invoice header field <b>Rate</b> , otherwise - tag is not displayed
P_13_6_1	Sum of invoice row fields <b>Total</b> where VAT code data field <b>KSEF Stawka podatku</b> (code: KSEF_STAW_PODAT) is set to <b>0%_KRAJOWE</b>
P_13_6_2	Sum of invoice row fields <b>Total</b> where VAT code data field <b>KSEF Stawka podatku</b> (code: KSEF_STAW_PODAT) is set to <b>0%_WDT</b>
P_13_6_3	Sum of invoice row fields <b>Total</b> where VAT code data field <b>KSEF Stawka podatku</b> (code: KSEF_STAW_PODAT) is set to <b>0%_EKSPORT</b>
P_13_7	Sum of invoice row fields <b>Total</b> where VAT code data field <b>KSEF Stawka podatku</b> (code: KSEF_STAW_PODAT) is set to <b>ZWOLNIENIE_Z_OPODATK</b>
P_13_8	Sum of invoice row fields <b>Total</b> where VAT code data field <b>KSEF Stawka podatku</b> (code: KSEF_STAW_PODAT) is set to <b>NP_WYLACZ_ART100UST1PKT4</b>
P_13_9	Sum of invoice row fields <b>Total</b> where VAT code data field <b>KSEF Stawka podatku</b> (code: KSEF_STAW_PODAT) is set to <b>NP_NA_ART100UST1PKT4</b>
P_13_10	Sum of invoice row fields <b>Total</b> where VAT code data field <b>KSEF Stawka podatku</b> (code: KSEF_STAW_PODAT) is set to <b>ODWROTNE_OBCIAZ</b>
P_13_11	Sum of invoice row fields <b>Total</b> where VAT code data field <b>KSEF Stawka podatku</b> (code: KSEF_STAW_PODAT) is set to <b>MARZA</b>
P_15	Invoice header field <b>Total</b>
<b>Adnotacje</b>	<b>Other notes on the invoice</b>
P_16	If document is POS invoices - <b>1</b> , otherwise - <b>2</b>
P_17	Always <b>2</b> <i>Description: W przypadku faktur, o których mowa w art. 106d ust. 1 ustawy - wyraz „samofakturowanie” - <b>1</b>; w przeciwnym przypadku - wartość <b>2</b></i>
P_18	If at least in one row, the VAT code data field <b>KSEF Stawka podatku</b> (code: KSEF_STAW_PODAT) is value <b>ODWROTNE_OBCIAZ - 1</b> , otherwise - <b>2</b> <i>Description: W przypadku dostawy towarów lub wykonania usługi, dla których obowiązującym do rozliczenia podatku od wartości dodanej lub podatku o podobnym charakterze jest nabywca towaru lub usługi - wyrazy „odwrotne obciążenie”, należy podać wartość „1”, w przeciwnym przypadku - wartość „2”</i>
P_18A	If header field <b>Total</b> (with VAT) * header field <b>Rate</b> is more than 15 000 PLN - <b>1</b> , otherwise - <b>2</b>

Name	Description
Zwolnienie /P_19N	Always <b>1</b> <i>Description: Znacznik braku dostawy towarów lub świadczenia usług zwolnionych od podatku na podstawie art. 43 ust. 1, art. 113 ust. 1 i 9 ustawy albo przepisów wydanych na podstawie art. 82 ust. 3 ustawy lub na podstawie innych przepisów</i>
NoweSrodkiTransportu /P_22N	Always <b>1</b> <i>Description: Znacznik braku wewnątrzwspólnotowej dostawy nowych środków transportu</i>
P_23	Always <b>2</b> W przypadku faktur wystawianych w procedurze uproszczonej przez drugiego w kolejności podatnika, o którym mowa w art. 135 ust. 1 pkt 4 lit. b i c oraz ust. 2, zawierającej adnotację, o której mowa w art. 136 ust. 1 pkt 1 i stwierdzenie, o którym mowa w art. 136 ust. 1 pkt 2 ustawy, należy podać wartość „1”, w przeciwnym przypadku - wartość „2”
PMarzy /P_PMarzyN	Always <b>1</b> <i>Description: Znacznik braku wystąpienia procedur marży, o których mowa w art. 119 lub art. 120 ustawy</i>
RodzajFaktury	<b>KOR</b> - if in sales invoice header field <b>Total</b> is negative and in header field <b>Credited invoice</b> is invoice No. Otherwise - <b>VAT</b>
<b>DaneFaKorygowanej</b>	 <b>Tags are displayed if in tag RodzajFaktury value is KOR, otherwise - tags are not displayed</b>
DataWystFaKorygowanej	Header field <b>Credited invoice</b> document field <b>Date</b>  Tag displayed if in tag RodzajFaktury value is <b>KOR</b>
NrFaKorygowanej	According mastersettings Master Settings→Receipt settings→Invoice datafield for external invoice number selected datafield from credited invoice, if not selected from header field <b>Credited invoice</b>  Tag displayed if in tag RodzajFaktury value is <b>KOR</b>
NrKSeF	<b>1</b> if header field <b>Credited invoice</b> has KSEF No., otherwise - tag is not displayed  Tag displayed if in tag RodzajFaktury value is <b>KOR</b>
NrKSeFFaKorygowanej	If tag NrKSeF is displayed - header field <b>Credited invoice</b> invoice KSEF No.  Tag displayed if in tag RodzajFaktury value is <b>KOR</b>
NrKSeFN	<b>1</b> if header field <b>Credited invoice</b> does not have KSEF No., otherwise - tag is not displayed  Tag displayed if in tag RodzajFaktury value is <b>KOR</b>
<b>FaWiersz</b>	<b>Information about items/services</b>
NrWierszaFa	Invoice row No.

Name	Description
P_7	Invoice row field <b>Description</b>
P_8A	Invoice row field <b>Unit</b>
P_8B	Invoice row field <b>Qty</b>
P_9A	Invoice row field <b>Net price</b>
P_11	Invoice row field <b>Total</b>
P_12	Invoice row field <b>VAT</b> code field <b>REVERSE VAT %</b> if it is empty - <b>VAT%</b>  Possible values: 23, 22, 8, 7, 5, 4, 3, 0 KR, 0 WDT, 0 EX, zw, oo, np I, np II
KursWaluty	If invoice header field <b>Currency</b> is not <b>PLN</b> - invoice header field <b>Rate</b> (format: 0.000000), otherwise - tag is not displayed
<b>Platnosc</b>	
TerminPlatnosci /Termin	Invoice header field <b>Due date</b>

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