

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.



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 cor

Custom token name *

DIRECTO

The maximum number of characters is 256.

Select the role to which the token is assigned *

Selected (2)

access invoices

issue invoices

view permissions

managing permissions



Faktury

Historia sesji

Uprawnienia

Dodaj administratora

Nadaj uprawnienie

Zarządzaj uprawnieniami

Moje uprawnienia

Tokeny

Generuj token

Lista tokenów

Certyfikaty

Generowanie tokena

Zakończono pomyślnie

Twój token został pomyślnie wygenerowany.

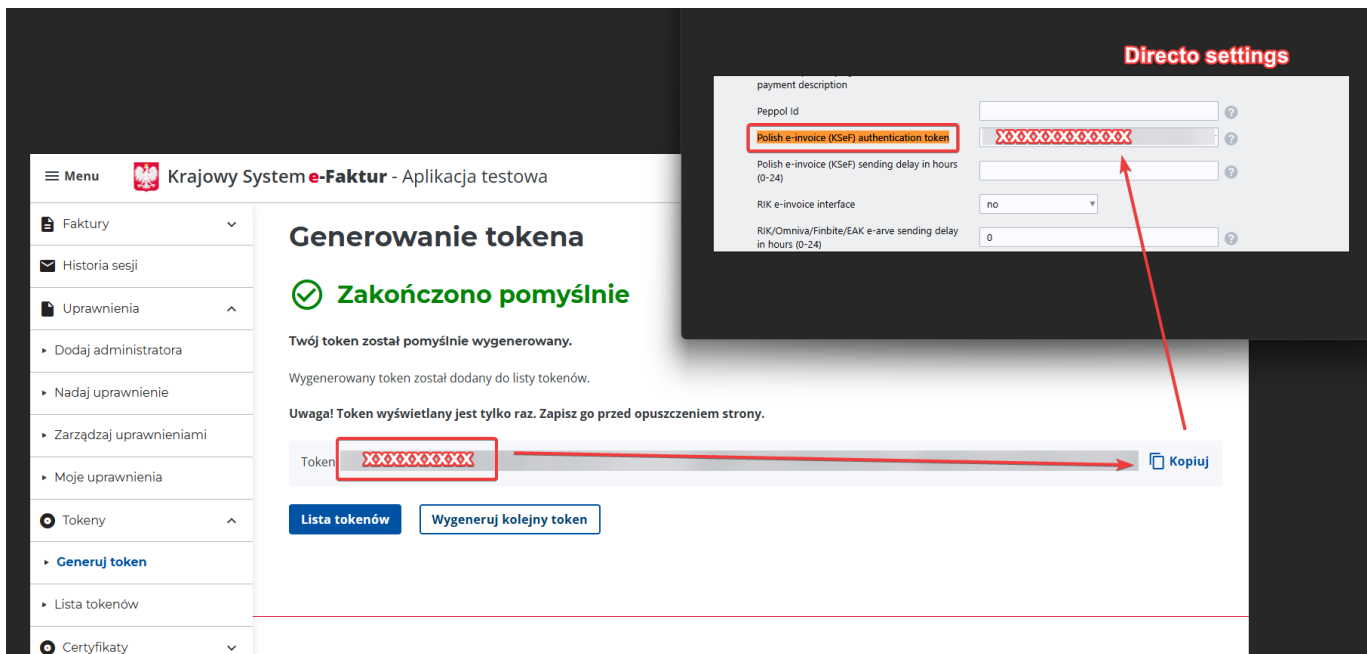
Wygenerowany token został dodany do listy tokenów.

Uwaga! Token wyświetlany jest tylko raz. Zapisz go przed opuszczeniem strony.

Token: XXXXXXXXXX Kopiuj

Lista tokenów

Wygeneruj kolejny token



- 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 exists, 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:**

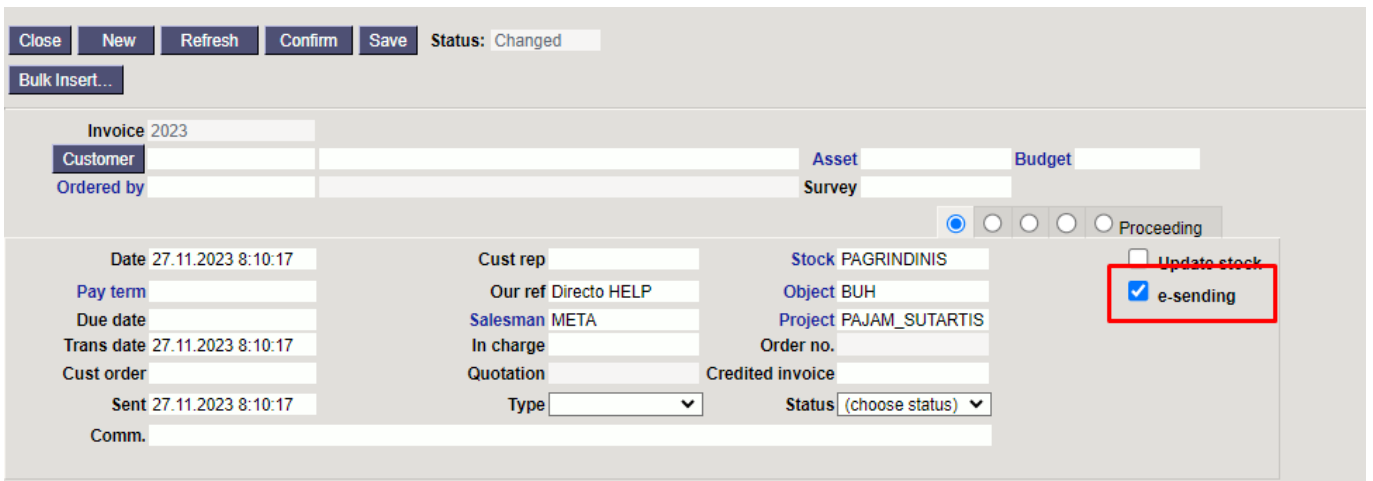
- **MANDATORY** Name
- **MANDATORY** Street
- **MANDATORY** Country
- City (can be empty)
- Postal code (can be empty)
- Vat reg no - without country code, otherwise **BRAK** (can be empty) ( must be without country code)

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.



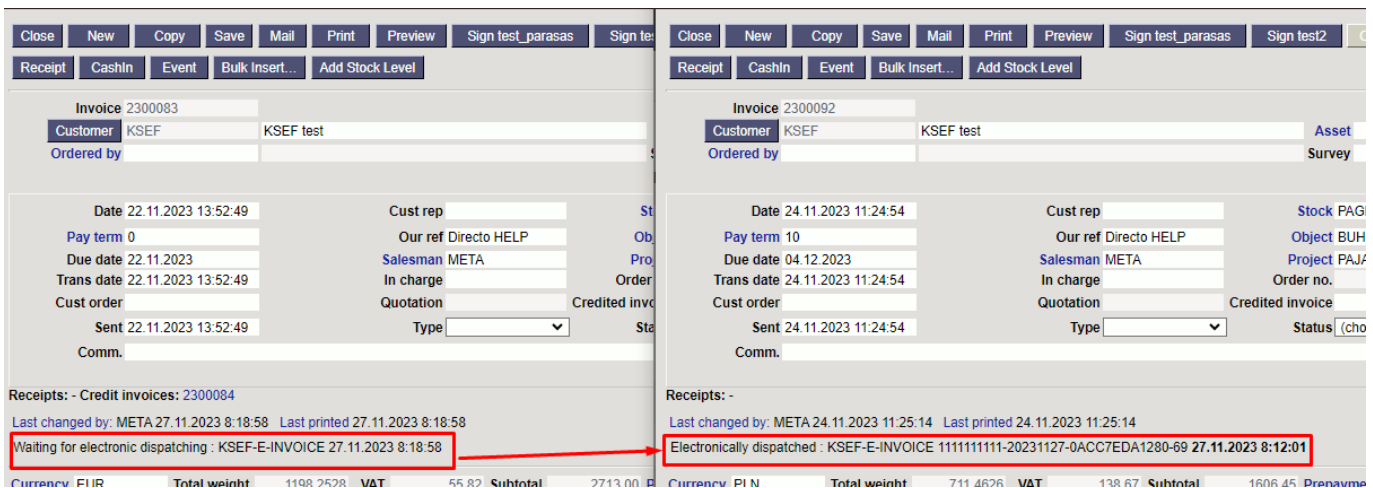
The screenshot shows an invoice form with the following details:

- Buttons: Close, New, Refresh, Confirm, Save, Status: Changed
- Section: Invoice 2023
- Fields: Customer, Asset, Budget, Ordered by, Survey
- Radio buttons: Proceeding (selected)
- Fields: Date 27.11.2023 8:10:17, Cust rep, Stock PAGRINDINIS, Update stock (checkbox), e-sending (checkbox checked)
- Fields: Pay term, Our ref Directo HELP, Object BUH
- Fields: Due date, Salesman META, Project PAJAM_SUTARTIS
- Fields: Trans date 27.11.2023 8:10:17, In charge, Order no.
- Fields: Cust order, Quotation, Credited invoice
- Fields: Sent 27.11.2023 8:10:17, Type, Status (choose status)
- Field: Comm.

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



The image shows two side-by-side screenshots of the invoice form:

- Left Screenshot (Invoice 2300083):** Shows the invoice with a status of "Waiting for electronic dispatching : KSEF-E-INVOICE 27.11.2023 8:18:58".
- Right Screenshot (Invoice 2300092):** Shows the invoice with a status of "Electronically dispatched : KSEF-E-INVOICE 111111111-20231127-0ACC7EDA1280-69 27.11.2023 8:12:01".

Both screenshots show the same form structure as the previous one, but with different dates and statuses. A red arrow points from the status text in the left screenshot to the status text in the right screenshot.

2.2. Errors

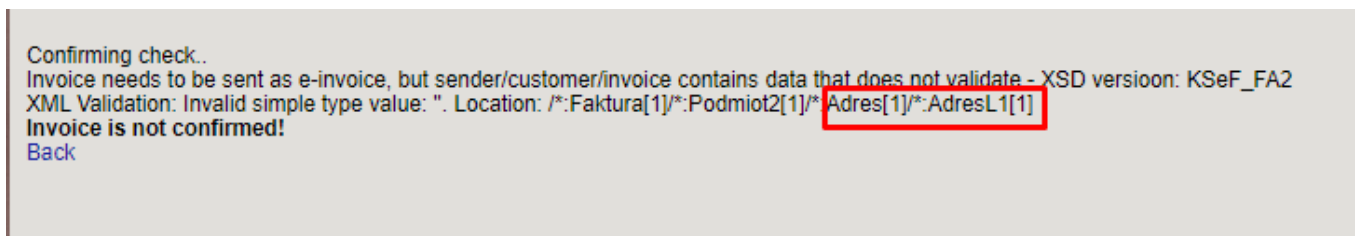
While confirming of the invoice, Directo checks if the settings are filled correctly. If there is something incorrect - there is no possibility to confirm the invoice with checkbox **e-sending**. You may confirm invoice with out the checkbox **e-sending** - it will not be send to KSEF.

For example, in the picture we see error message.

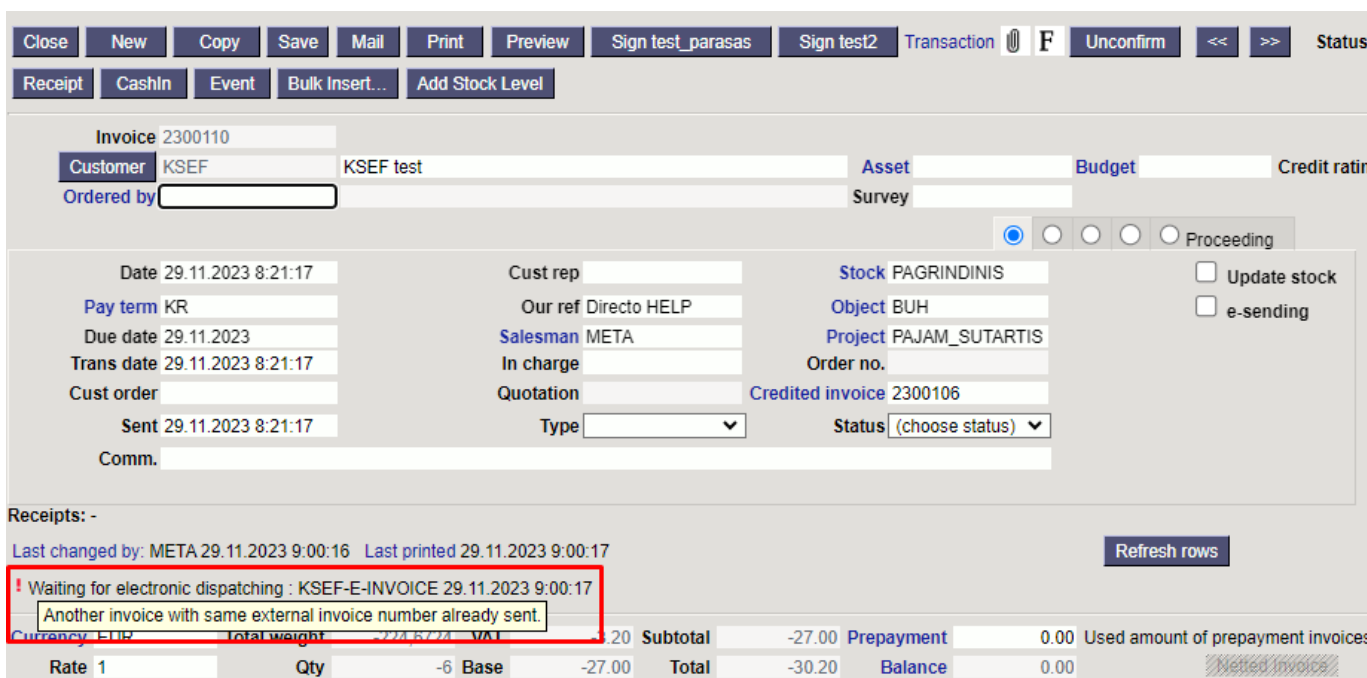
The error is in field AdresL1

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

Name	Description
Podmiot1	Information about the seller
Adres/AdresL1	Setting→Master Settings→Company legal address
Podmiot2	Information about the buyer
Adres/AdresL1	Customer fields: Street, City, Postal code



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



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 Access to invoices→Invoice information Example: https://ksef-test.mf.gov.pl/web/verify/111111111-20231220-CFD9D7DC1724-5F/mlwHL9kQOqrT82nK7IVw5Xvuhxtn7KAhz7vxYiSOXY4%3D	Date and time when the KSEF No. was receive









4. Sales invoices tags

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

Name	Description
Podmiot1	<i>Information about the seller</i>
Daneldentyfikacyjne/NIP	Setting→Master Settings→Common settings→Company VAT no
Daneldentyfikacyjne/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
Podmiot2	<i>Information about the buyer</i>
Daneldentyfikacyjne	Buyer identification details
NIP	If in customer field Country code is PL and field Vat reg no is not empty or filed with value BRAK - customer field Vat reg no , otherwise - tag is not displayed ( must be without country code)
KodUE	If in customer field Country code is not PL and field Vat reg no is not empty or filed with value BRAK - customer field Country code, otherwise - tag is not displayed





Name	Description
NrVatUE	If tag DaneIdentyfikacyjne/KodUE is displayed, customer field Vat reg no , otherwise - tag is not displayed ( must be without country code)
BrakID	If customer field Vat reg no is empty or filed with value BRAK - 1 , otherwise - tag is not displayed
Nazwa	Customer field Name
Adres	Address details
KodKraju	Customer field Country
AdresL1	Customer fields: Street, City, Postal code
JST	 Fix Me! 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
GV	 Fix Me! 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 JST = 1 or GV = 1
DaneIdentyfikacyjne	Identification details of the third party
NIP	 Fix Me!
IDWew	 Fix Me!
KodUE	 Fix Me!
NrVatUE	 Fix Me!
KodKraju	 Fix Me!
NrID	 Fix Me!
BrakID	 Fix Me!
Nazwa	 Fix Me!
Rola	8 - when JST = 1 10 - when GV = 1

Name	Description
Fa	
KodWaluty	Invoice header field Currency

Name	Description
P_1	According settings: SETTINGS → COMMON SETTINGS → TRANSPORT PARAMETERS:, CODE - DataWystawienia <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 Invoice
P_6	According settings: SETTINGS → COMMON SETTINGS → TRANSPORT PARAMETERS:, CODE - DataWystawienia <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 Total where VAT code VAT% is 23% or 22%
P_14_1	Sum of invoice row differences of fields RS VAT - Total where VAT code VAT% is 23% or 22%
P_14_1W	If invoice header field Currency is not PLN = P_14_1 value * invoice header field Rate , otherwise - tag is not displayed
P_13_2	Sum of invoice row fields Total where VAT code VAT% is 8% or 7%
P_14_2	Sum of invoice row differences of fields RS VAT - Total where VAT code VAT% is 8% or 7%
P_14_2W	If invoice header field Currency is not PLN = P_14_2 value * invoice header field Rate , otherwise - tag is not displayed
P_13_3	Sum of invoice row fields Total where VAT code VAT% is 5%
P_14_3	Sum of invoice row differences of fields RS VAT - Total where VAT code VAT% is 5%
P_14_3W	If invoice header field Currency is not PLN = P_14_2 value * invoice header field Rate , otherwise - tag is not displayed
P_13_4	Sum of invoice row fields Total where VAT code VAT% is 4% or 3%
P_14_4	Sum of invoice row differences of fields RS VAT - Total where VAT code VAT% is 4% or 3%
P_14_4W	If invoice header field Currency is not PLN = P_14_4 value * invoice header field Rate , otherwise - tag is not displayed
P_13_6_1	Sum of invoice row fields Total where VAT code data field KSEF Stawka podatku (code: KSEF_STAW_PODAT) is set to 0%_KRAJOWE
P_13_6_2	Sum of invoice row fields Total where VAT code data field KSEF Stawka podatku (code: KSEF_STAW_PODAT) is set to 0%_WDT
P_13_6_3	Sum of invoice row fields Total where VAT code data field KSEF Stawka podatku (code: KSEF_STAW_PODAT) is set to 0%_EKSPORT
P_13_7	Sum of invoice row fields Total where VAT code data field KSEF Stawka podatku (code: KSEF_STAW_PODAT) is set to ZWOLNIENIE_Z_OPODATK
P_13_8	Sum of invoice row fields Total where VAT code data field KSEF Stawka podatku (code: KSEF_STAW_PODAT) is set to NP_WYLACZ_ART100UST1PKT4
P_13_9	Sum of invoice row fields Total where VAT code data field KSEF Stawka podatku (code: KSEF_STAW_PODAT) is set to NP_NA_ART100UST1PKT4
P_13_10	Sum of invoice row fields Total where VAT code data field KSEF Stawka podatku (code: KSEF_STAW_PODAT) is set to ODWROTNE_OBCIAZ
P_13_11	Sum of invoice row fields Total where VAT code data field KSEF Stawka podatku (code: KSEF_STAW_PODAT) is set to MARZA

Name	Description
P_15	Invoice header field Total
Adnotacje	Other notes on the invoice
P_16	If document is POS invoices - 1 , otherwise - 2
P_17	Always 2 <i>Description: W przypadku faktur, o których mowa w art. 106d ust. 1 ustawy - wyraz „samofakturowanie” - 1; w przeciwnym przypadku - wartość 2</i>
P_18	If at least in one row, the VAT code data field KSEF Stawka podatku (code: KSEF_STAW_PODAT) is value ODWROTNE_OBCIAZ - 1 , otherwise - 2 <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 Total (with VAT) * header field Rate is more then 15 000 PLN - 1 , otherwise - 2
Zwolnienie /P_19N	Always 1 <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 1 <i>Description: Znacznik braku wewnątrzwspólnotowej dostawy nowych środków transportu</i>
P_23	Always 2 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 1 <i>Description: Znacznik braku wystąpienia procedur marży, o których mowa w art. 119 lub art. 120 ustawy</i>
RodzajFaktury	KOR - if in sales invoice header field Total is negative and in header field Credited invoice is invoice No. Otherwise - VAT
DaneFaKorygowanej	 Tags are displayed if in tag RodzajFaktury value is KOR, otherwise - tags are not displayed
DataWystFaKorygowanej	Header field Credited invoice document field Date  Tag displayed if in tag RodzajFaktury value is KOR
NrFaKorygowanej	According mastersettings Master Settings→Receipt settings→Invoice datafield for external invoice number selected datafield from credited invoice, if not selected from header field Credited invoice  Tag displayed if in tag RodzajFaktury value is KOR

Name	Description
NrKSeF	<p>1 if header field Credited invoice has KSEF No., otherwise - tag is not displayed</p> <p> Tag displayed if in tag Rodzaj Faktury value is KOR</p>
NrKSeFFaKorygowanej	<p>If tag NrKSeF is displayed - header field Credited invoice invoice KSEF No.</p> <p> Tag displayed if in tag Rodzaj Faktury value is KOR</p>
NrKSeFN	<p>1 if header field Credited invoice does not have KSEF No., otherwise - tag is not displayed</p> <p> Tag displayed if in tag Rodzaj Faktury value is KOR</p>
FaWiersz	Information about items/services
NrWierszaFa	Invoice row No.
P_7	Invoice row field Description
P_8A	Invoice row field Unit
P_8B	Invoice row field Qty
P_9A	Invoice row field Net price
P_11	Invoice row field Total
P_12	<p>Invoice row field VAT code field REVERSE VAT % if it is empty - VAT%</p> <p> Possible values: 23, 22, 8, 7, 5, 4, 3, 0 KR, 0 WDT, 0 EX, zw, oo, np I, np II</p>
KursWaluty	If invoice header field Currency is not PLN - invoice header field Rate (format: 0.000000), otherwise - tag is not displayed
Platnosc	
TerminPlatnosci /Termin	Invoice header field Due date

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