

Sisukord

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Ta strona nie jest jeszcze kompletnie przetłumaczona. Pomoc mile widziana.

(po skompletowaniu usuń ten komentarz)

KSEF 2026

1. Settings

• Master Settings

- **MANDATORY** Master Settings→Sale settings→e-invoice sending is selectable 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:

First, grant permissions to send and view invoices, and then generate a token. Below you will find instructions on how to assign permissions in the KSeF system.

Menu **Krajowy System e-Faktur**

Uprawnienia ^

- Dodaj administratora
- Nadaj uprawnienie**
- Zarządzaj uprawnieniami
- Moje uprawnienia

Tokeny ^

- Generuj token
- Lista tokenów

Certyfikaty v

Osoba uprawniająca: PESEL
65051303175

Rodzaj uprawnień

Rodzaj uprawnienia*
Osobie fizycznej do pracy w KSeF

Dane osoby fizycznej

Rodzaj podmiotu uprawnianego*
 Osoba fizyczna posługująca się Profilem Zaufanym lub certyfikatem zawierającym identyfikator NIP lub PESEL
 Osoba fizyczna posługująca się certyfikatem niezawierającym identyfikatora NIP ani PESEL

Identyfikator*
 NIP PESEL

Wpisz NIP

Imię*
Wpisz imię

Nazwisko*
Wpisz nazwisko

Menu **Krajowy System e-Faktur**

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Certyfikaty v

Imię*
[Redacted]

Nazwisko*
[Redacted]

Zakres uprawnień

Osoba będzie uprawniona do:*
Zaznaczenie co najmniej jednego uprawnienia jest obowiązkowe.

- wystawiania faktur
- przeglądania faktur
- przeglądania uprawnień
- przeglądania historii sesji (generowania UPO)
- zarządzania jednostkami podrzędnymi

Pierwsze dwie opcje są niezbędne, inne do Waszej dyspozycji./The first two options are essential; the others are up to you.

Nadaj uprawnienia Zrezygnuj

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

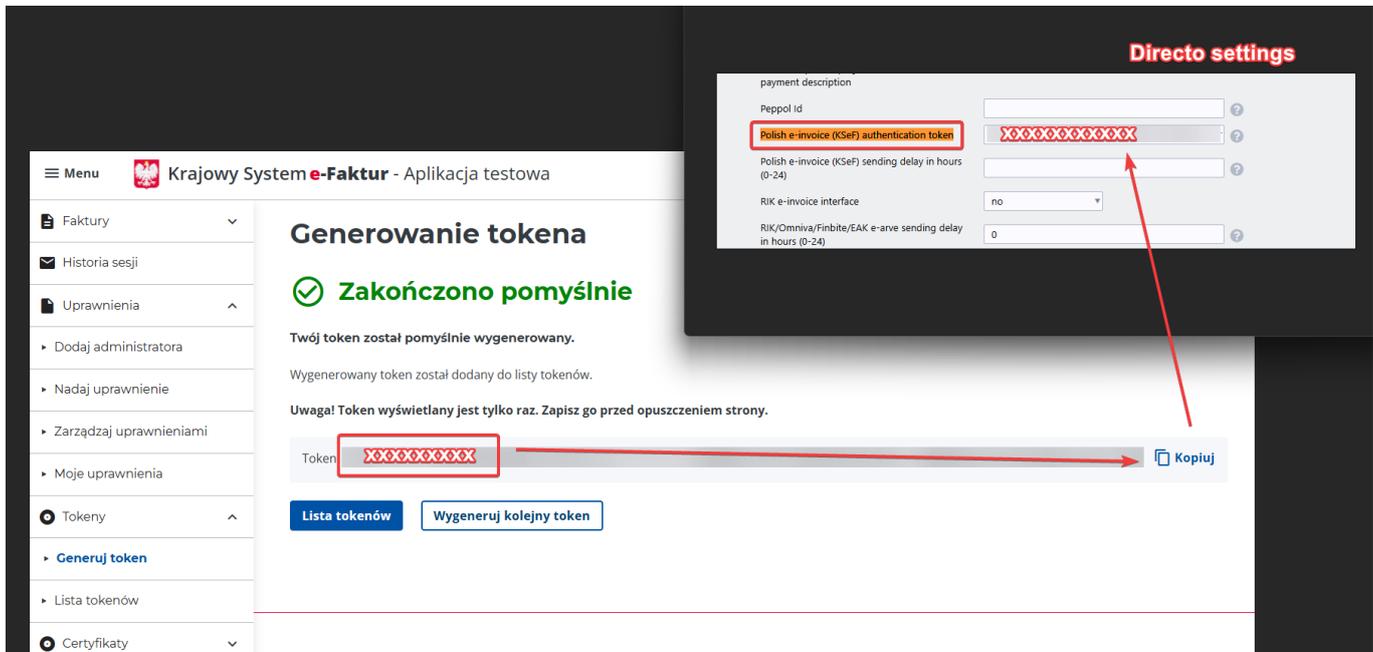
Twój token został pomyślnie wygenerowany.

Wygenerowany token został dodany do listy tokenów.

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

Token: XXXXXXXXXX Kopuj

[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.

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.

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 1111111111-20231127-0ACC7EDA1280-69 27.11.2023 8:12:01**

KSEF No. 1111111111 -20231127 -0ACC7EDA1280 -69

Close New Copy Save Mail Print Preview Sign test_parasas Sign test

Receipt CashIn Event Bulk Insert... Add Stock Level

Invoice 2300083

Customer KSEF KSEF test

Ordered by

Date 22.11.2023 13:52:49 Cust rep St

Pay term 0 Our ref Directo HELP Ob

Due date 22.11.2023 Salesman META Pro

Trans date 22.11.2023 13:52:49 In charge Order

Cust order Quotation Credited inv

Sent 22.11.2023 13:52:49 Type Sta

Comm.

Receipts: - Credit invoices: 2300084

Last changed by: META 27.11.2023 8:18:58 Last printed 27.11.2023 8:18:58

Waiting for electronic dispatching : KSEF-E-INVOICE 27.11.2023 8:18:58

Currency: EUR Total weight: 1108.2528 VAT: 55.82 Subtotal: 2713.00

Close New Copy Save Mail Print Preview Sign test_parasas Sign test2

Receipt CashIn Event Bulk Insert... Add Stock Level

Invoice 2300092

Customer KSEF KSEF test Asset

Ordered by Survey

Date 24.11.2023 11:24:54 Cust rep Stock PAG

Pay term 10 Our ref Directo HELP Object BUH

Due date 04.12.2023 Salesman META Project PAJ

Trans date 24.11.2023 11:24:54 In charge Order no.

Cust order Quotation Credited invoice

Sent 24.11.2023 11:24:54 Type Status (cho

Comm.

Receipts: -

Last changed by: META 24.11.2023 11:25:14 Last printed 24.11.2023 11:25:14

Electronically dispatched : KSEF-E-INVOICE 1111111111-20231127-0ACC7EDA1280-69 27.11.2023 8:12:01

Currency: PLN Total weight: 711.4626 VAT: 138.67 Subtotal: 1606.45

2.2. Errors

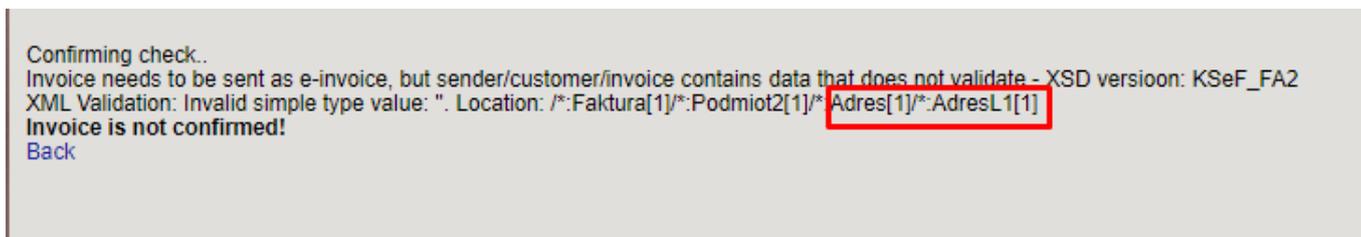
While confirming of the invoice, Directo checks if the settings are filled correctly. If there is something incorrect - there is no possibility to confirm the invoice with checkbox **e-sending**. You may confirm invoice with out the checkbox **e-sending** - it will not be send to KSEF.

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:

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

Resending

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