

# 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 **Osoba uprawnniająca: PESEL**  
65051303175

**Rodzaj uprawnień**

Rodzaj uprawnienia\*  
Osobie fizycznej do pracy w KSeF

**Dane osoby fizycznej** — Zwiń

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**

Uprawnienia

**Nadaj uprawnienie**

Imię\*  
Nazwisko\*

**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

**Nadaj uprawnienia** **Zrezygnuj**

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

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 connection.

### 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**

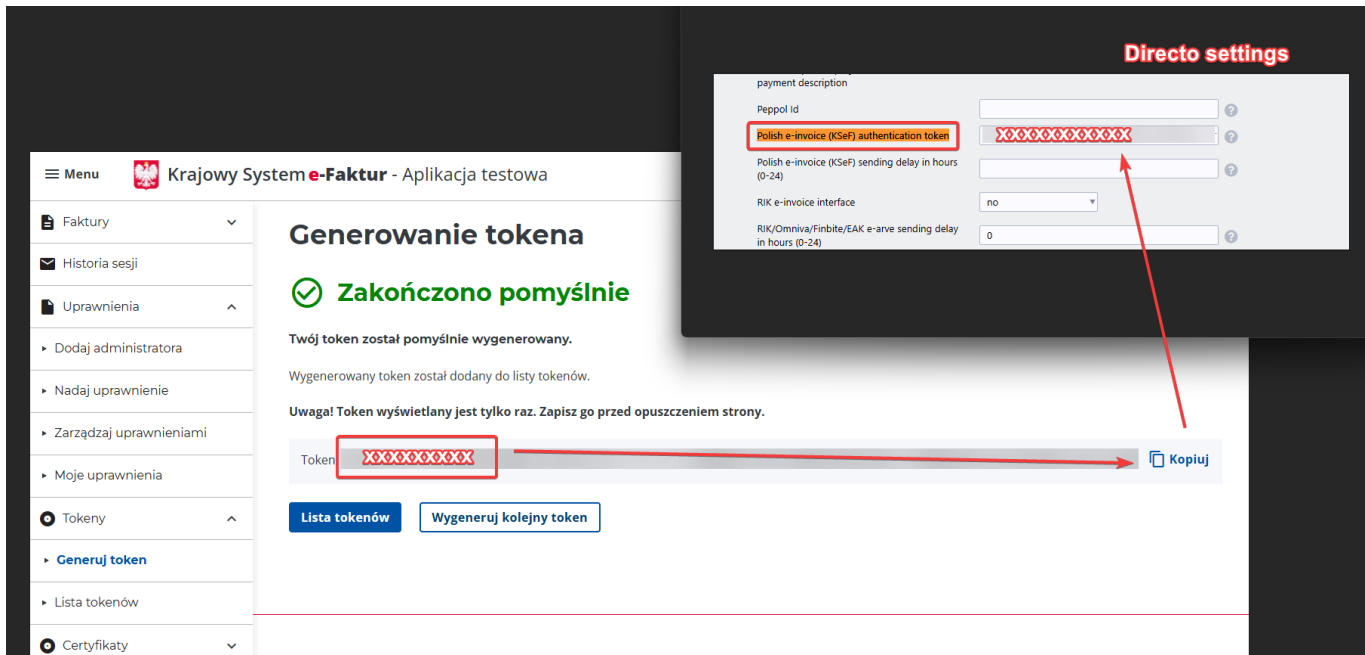
Twój token został pomyślnie wygenerowany.

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

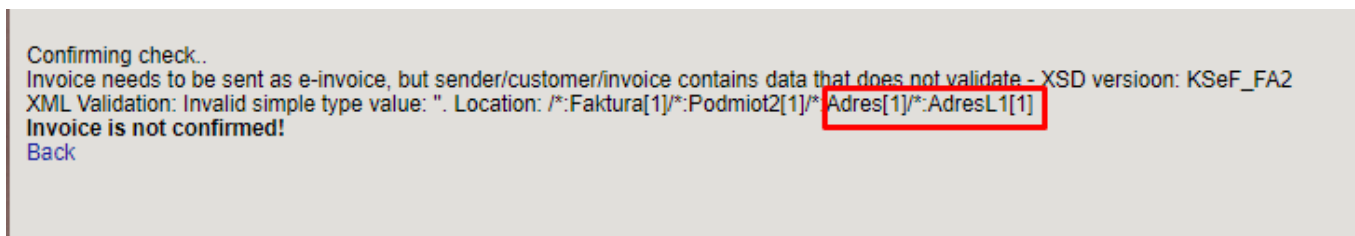
While confirming of the invoice, Directo checks if the settings are filled correctly. If there is something incorrect - there is no possibility to confirm the invoice with checkbox **e-sending**. You may confirm invoice with out the checkbox **e-sending** - it will not be send to KSEF.

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



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

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

## Resending

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