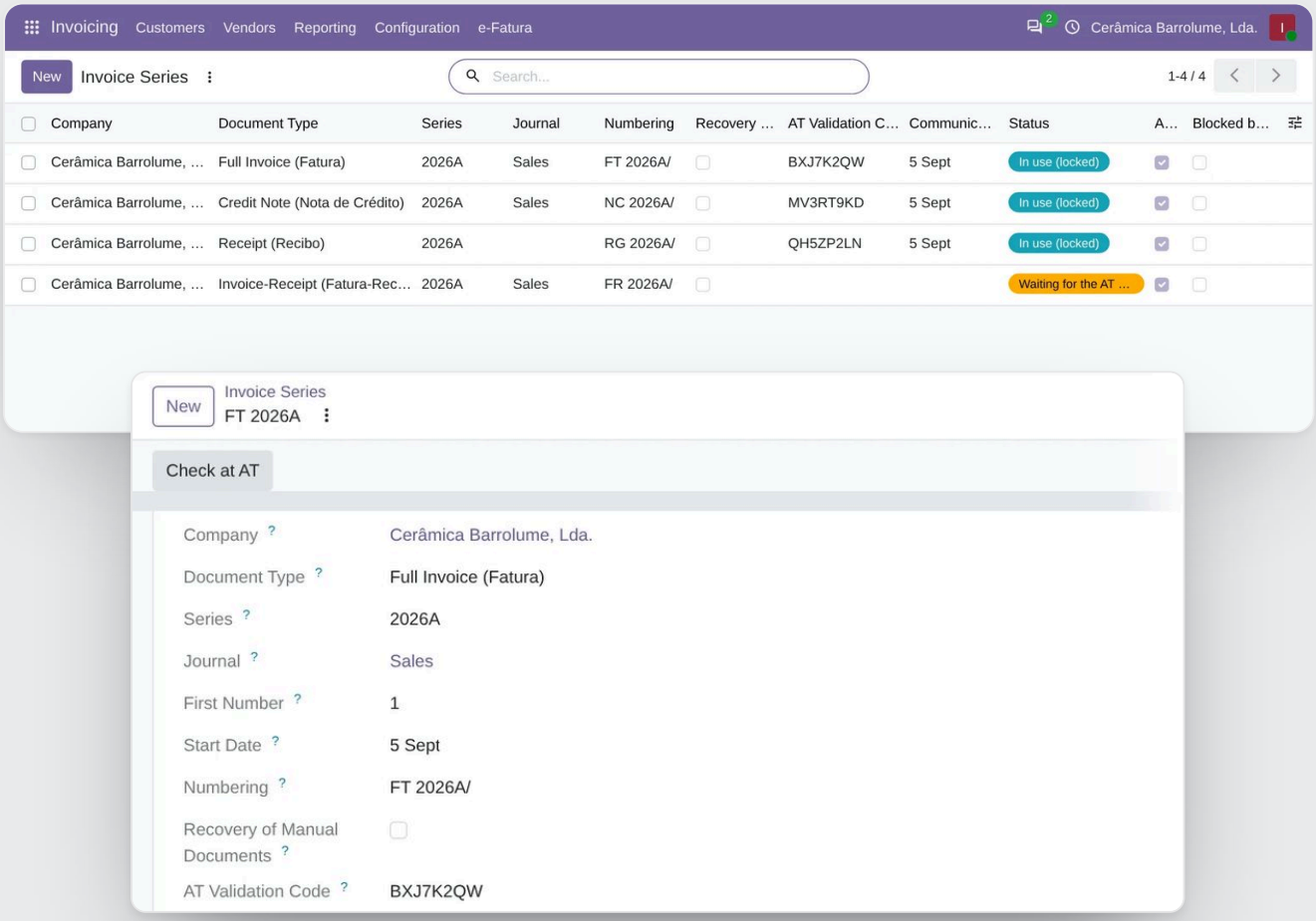
USER MANUAL · INVOICING AND TAX

# CIUS-PT & ATCUD for Odoo

For those who already have the module: install it, activate it, set it up and use it, step by step.

Module version 20.0.1.11.4 | Odoo 20 screenshots | Edition of 20-11-2026




**Real Odoo 20 screenshot.** The list of invoice series and the detail of one of them, with its AT validation code.

# Contents

On the right, the page where each section starts. Menu and button names are those of Odoo in English.

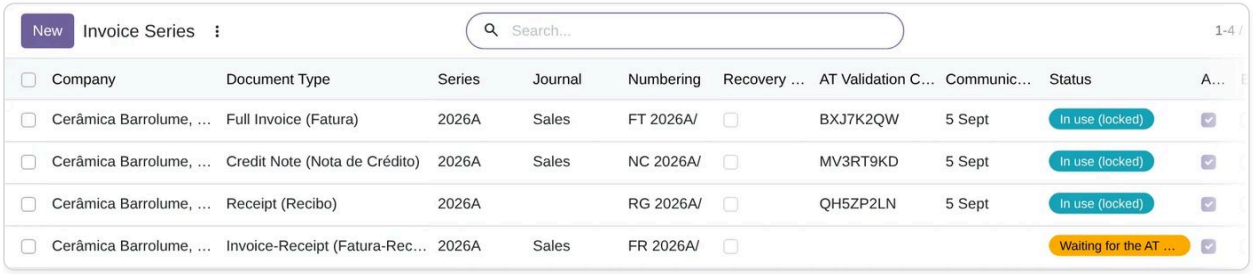

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This manual describes version 20.0.1.11.4 of the module (Odoo branch 20.0, commit eb49e56f6). Everything it says comes from its code: menus, buttons, fields, scheduled actions and error messages.

The screenshots come from a test Odoo 20 database, with a made-up company and data and no real connection to FlexigoTech Cloud. In Odoo 17, 18 and 19 the module has its own version: if something on your screen does not match, write to us.

# 1 What it is and where it is

The connector adds to Odoo a Portuguese invoicing app with invoice series, electronic invoices, receipts, payment terms, SAF-T reports, audit trail and GDPR requests. Everything hangs from its own menu inside Invoicing. The AT has not certified the module: read the warning in "Before you start" before invoicing with it.




- **Real Odoo 20 screenshot.** List of the company's document series, with their numbering, their AT validation code and their status.

| | |
|---|---|
| **Invoicing › e-Fatura › Invoices** | Opens the **Electronic Invoices** list, with the electronic document of each invoice. |
| **Invoicing › e-Fatura › Receipts** | Opens the **Receipts** list. |
| **Invoicing › e-Fatura › Payment Terms** | Opens the **Payment Terms** list. |
| **Invoicing › e-Fatura › Configuration** | Inside is **Invoice Series**, with the document series of each company. |
| **Invoicing › e-Fatura › Reports** | Inside are **Audit Trail** and **SAF-T Filings**. |
| **Invoicing › e-Fatura › GDPR** | Inside are the **Data Subject Requests**. |

Outside its app, the connector extends Odoo's invoices, invoice lines, payments, the payment registration wizard, taxes, contacts, products, the company and users, and the print reports. It also launches the **Communicate to e-Fatura** and **Record SAF-T upload** wizards.

# 2 Before you start

Before installing the connector and creating your first series, have the following to hand.

- A company with country Portugal, its NIF, its address and the euro as currency: the SAF-T (PT) is kept in euros.
- Your company's access to the Portal das Finanças. There you communicate each series to the AT and receive its validation code, of 8 or more letters and digits.
- To communicate series and documents from Odoo, also: a Portal das Finanças sub-user with the web service profile, and the AT's digital certificate and public key, which are uploaded on the **Portugal AT** tab of the company. According to the AT's integration manual, both are requested from the AT as the producer of the programme. Without them, you communicate the series on the portal and type the code into Odoo.
- A subscription to FlexigoTech Cloud or its 14-day trial, with no card required: FlexigoTech Cloud signs each document when it is issued. It is activated in **Settings**, in the FlexigoTech Cloud block.
- Odoo 17, 18, 19 or 20 on Odoo.sh or on your own server. Odoo Online does not work, because it does not allow installing third-party modules.
- A person with Odoo administrator rights, to install the module and create the series. Whoever invoices also needs the module's group, **Flexigo Portugal Efatura E Invoice Connector User**.

> The AT has not certified this module: its documents carry certificate number 0. The module's AT certification is in progress. Decreto-Lei 28/2019 (art. 4.º, n.º 1) requires companies with a seat, permanent establishment or domicile in Portugal, and those that invoice under Portuguese rules per art. 35.º-A of the VAT Code, to use only invoicing software with prior certification from the AT, when one of these conditions applies: turnover of more than €50,000 in the previous year, using invoicing software, or having to keep organised accounting (or having chosen to). Anyone in that situation cannot invoice with this module until the AT gives it a number.



# 3 Installation

The module is installed like any third-party Odoo module. An administrator is needed.

### How to get it

From its page on Odoo Apps (**https://apps.odoo.com/apps/modules/20.0/flexigo_portugal_efatura_e_invoice_connector**) or from the connector's page on flexigotech.com. Choose the Odoo version you use: each version is a separate module.

The module depends on `flexigotech_cloud`, the connection to FlexigoTech Cloud. On Odoo Apps, the module's page lists it under "Community Apps Dependencies" and its price already includes it; it is free and has its own page (**https://apps.odoo.com/apps/modules/20.0/flexigotech_cloud**). Put both folders together in the same modules path and Odoo installs `flexigotech_cloud` at the same time.

### On Odoo.sh

1. **Upload the folders to your repository**
   Copy `flexigo_portugal_efatura_e_invoice_connector` and `flexigotech_cloud` into your project's branch, in your modules folder, and push.

2. **Wait for Odoo.sh to build the branch**
   When it finishes, both modules are in the branch.

3. **Install the app**
   In **Apps**, click **Update Apps List** (with developer mode on), search for "CIUS-PT" and click **Activate**.

### On your server

1. **Copy the folders**
   Leave `flexigo_portugal_efatura_e_invoice_connector` and `flexigotech_cloud` in a folder that is on the `addons_path` of your Odoo.

2. **Restart Odoo**
   So it reads the new modules.

3. **Install the app**
   In **Apps**, **Update Apps List**, search for "CIUS-PT" and click **Activate**.

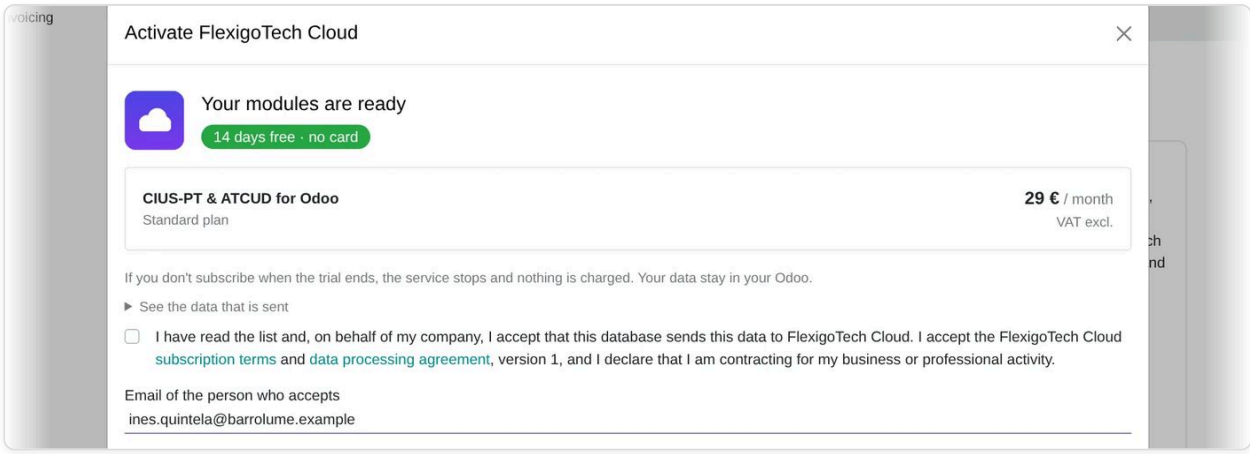
> When installing it, Odoo also installs the apps the module depends on: Invoicing. If you already use them, nothing you have changes.

USER MANUAL · CIUS-PT & ATCUD

# 4 Activate FlexigoTech Cloud: the 14-day trial

FlexigoTech Cloud signs each document of a Portuguese company when it is issued. Until the database is connected and the module has the trial or the subscription, Odoo does not issue: the invoice stays in draft. The calls to the AT do not go through FlexigoTech Cloud: your Odoo makes them.

1. **Click Activate in the bar at the top**
   It appears as soon as you install the module. It opens the **Activate FlexigoTech Cloud** window, with the Standard plan and its 14 free days, no card required.




- **Real Odoo 20 screenshot.** The activation window: read the list of data, tick the box and enter your email.

2 **Accept and enter your email**

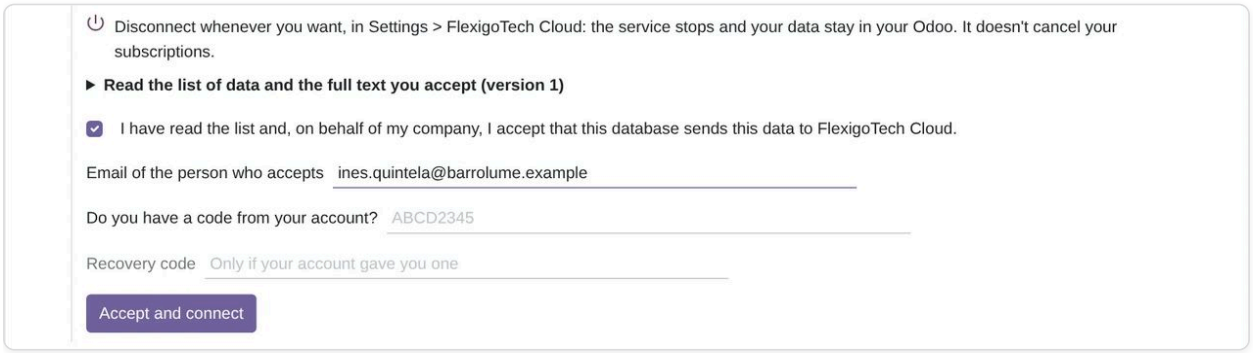
Tick "I have read the list and, on behalf of my company..." (it includes the subscription terms and the data processing agreement) and enter the **Email of the person who accepts**.

3 **Click Connect and start the trial**

Odoo registers the database with FlexigoTech Cloud and starts the module's trial. If you leave it for later, **Later** closes the window.

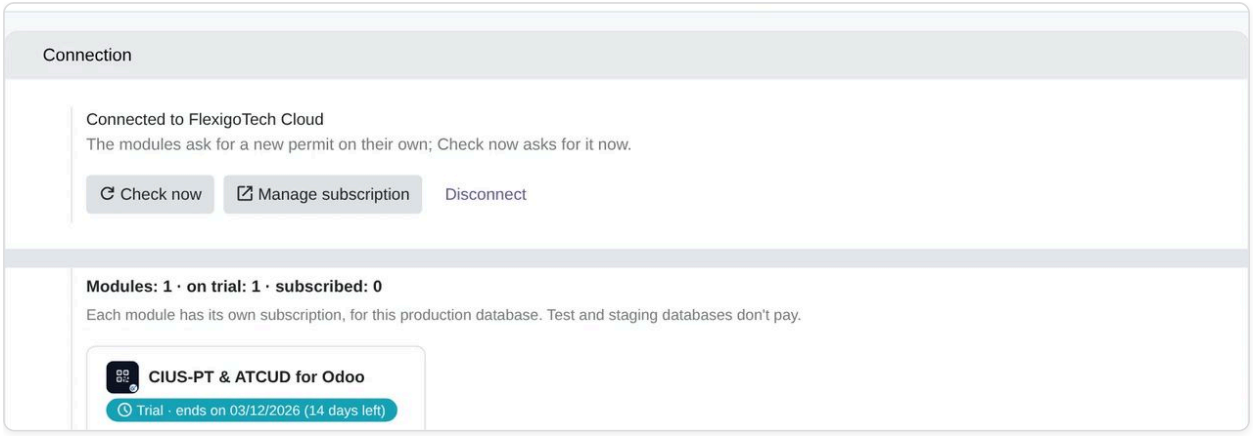
## The same, from Settings

In **Settings › FlexigoTech Cloud** is the full list of what the database sends. Tick the box, enter the email and click **Accept and connect**. If you already have an account at app.flexigotech.com, the field **Do you have a code from your account?** links the database to it (the code is valid for 10 minutes).




- **Real Odoo 20 screenshot.** Settings › FlexigoTech Cloud, before connecting: the ticked box, the email and **Accept and connect**.

With the database connected, the **Modules** block shows each module with its status: **On trial** and the date it ends, **Subscribed**, etc. From there you choose the plan (Standard or Pro, monthly or yearly) and click **Subscribe**: payment is made on the Stripe page, outside Odoo.




- **Real Odoo 20 screenshot.** Settings › FlexigoTech Cloud with the database connected and the connector on trial.

| PLAN | PRICE | INCLUDES |
|---|---|---|
| **Standard** | €29 a month or €290 a year | Support response within 1 working day |
| **Pro** | €58 a month or €580 a year | Response within 4 working hours and a video call if needed |

Prices exclude VAT. If you do not subscribe when the trial ends, the service stops and nothing is charged; your data stays in your Odoo. **Check now** requests the permission immediately (otherwise the module renews it by itself every 6 hours).

> A trial cannot be started on a neutralised copy (staging) or on a database with demo data: Settings says so with "This database is a neutralised copy or has demo data, so trials can't be started here."

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# 5 Connect your series

Each series is created in **Invoicing › e-Fatura › Configuration › Invoice Series**, one per document type and journal.

### 1 Open the series menu

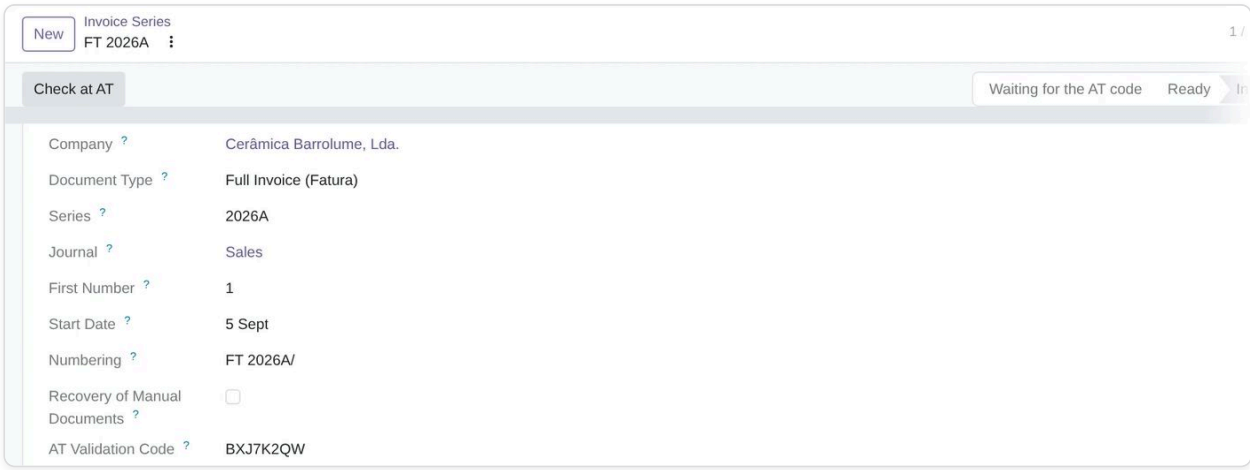
Go to **Invoicing › e-Fatura › Configuration › Invoice Series**. You see the list of series of your companies.




- **Real Odoo 20 screenshot.** The series list, still empty.

### 2 Click New

The series form opens. The **Company** comes filled in with yours.




- **Real Odoo 20 screenshot.** The form of a series.

3 **Choose the Document Type**

For example **Full Invoice (Fatura)**, **Simplified Invoice (Fatura Simplificada)** or **Credit Note (Nota de Crédito)**.

4 **Enter the Series**

It is the identifier you communicate to the AT, for example 2026A. It accepts letters, digits, ".", "_" and "-", without spaces or "/". Documents are numbered "TYPE SERIES/number", such as FT 2026A/1.

5 **Choose the Journal and fill in First Number and Start Date**

A series numbers the documents of a single journal. The **First Number** is 1 by default; change it if the series continues from another programme.

6 **Click Communicate to AT**

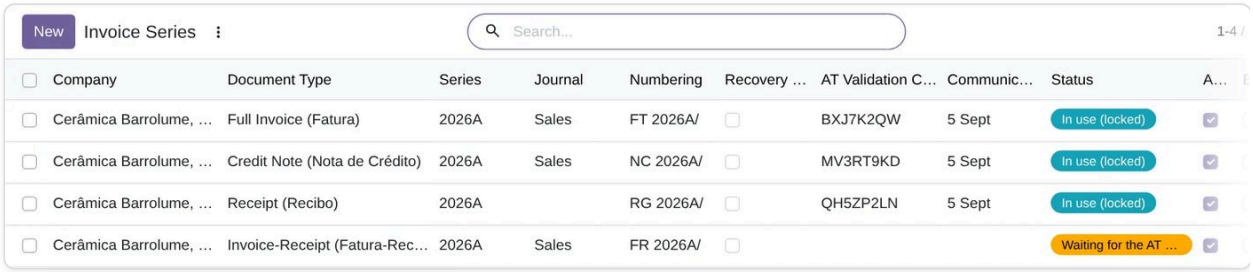
The button is hidden if the series already has a validation code. In the window you enter the Portal das Finanças sub-user and its password. Odoo communicates the series to the AT and stores the code it returns; the password is not stored.




- **Real Odoo 20 screenshot.** The **Series at the AT** window: the series, the operation, the sub-user and its password, and the **Send to AT** button.

7 **Check the result**

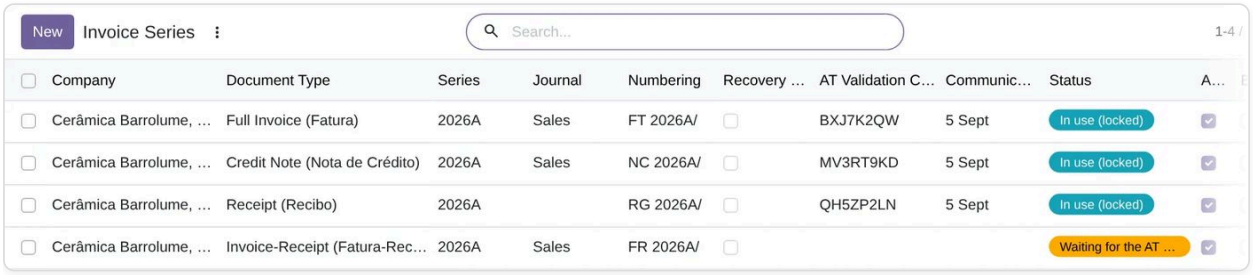
The **AT Validation Code** appears filled in and the **AT Status** changes to **Active at the AT**. If the AT rejects the request, Odoo shows "The AT has not accepted the request" with its reason. With **Check at AT** you query the series status again, and the **State** becomes **Ready**.




- **Real Odoo 20 screenshot.** The company's series: those communicated, with their AT validation code, and one still awaiting its own.

> How it has been tested: communication with the AT by web service, of series and documents, has been tested with simulated responses, built from the AT's official manuals and WSDL. With the real AT, the only recorded responses are from its test environment, dated 6 October 2026, and they are authentication errors: there is no record of any series or any document communicated successfully. Meanwhile, communicate the series on the Portal das Finanças and enter the code it gives you in **AT Validation Code**.

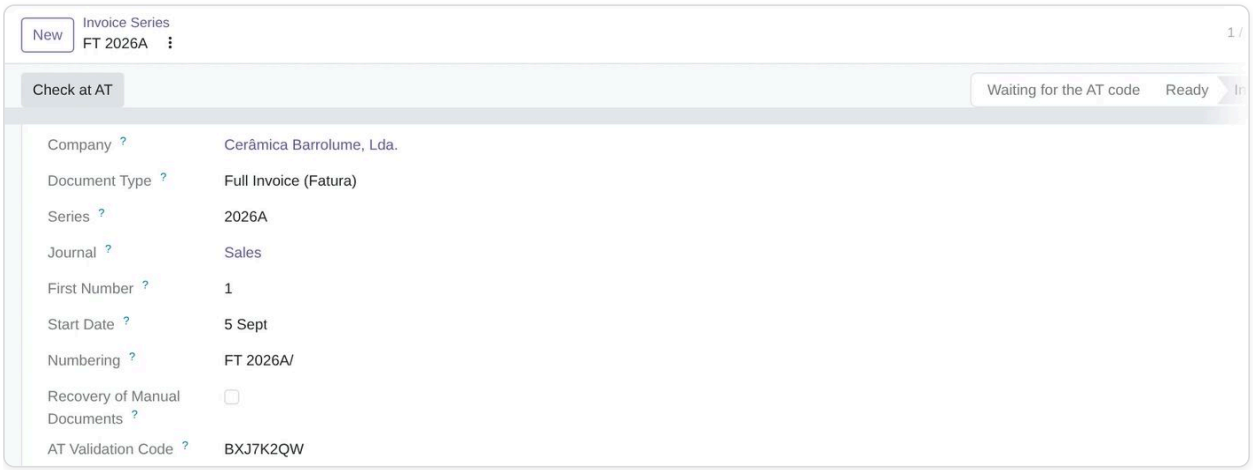
Afterwards, data does not go out by a scheduled task for the series: each operation with the AT is launched by hand from the form's buttons. **Finalize at AT** appears only with the series in **Active at the AT**. **Annul communication** also appears only if the series has not yet issued any ATCUD. The AT's response is kept in **Last AT Answer**, and invoices with ATCUD are counted in **Invoices with ATCUD**. A communicated or already used series is not deleted: it is closed by unticking **Active**.




- **Real Odoo 20 screenshot.** The series list with its AT validation code and its status.

# 6 The series options

When creating a series, these options are chosen, in **Invoicing › e-Fatura › Configuration › Invoice Series**.




- **Real Odoo 20 screenshot.** Form of a series with the AT validation code.

| OPTION | WHEN CREATED | WHAT IT DOES |
|---|---|---|
| **Company** | The active company at that moment | Company (NIF) the series belongs to. Required. |
| **Document Type** | Not selected | Type of the series' documents: **Full Invoice (Fatura)**, **Simplified Invoice (Fatura Simplificada)**, **Invoice-Receipt (Fatura-Recibo)**, **Debit Note (Nota de Débito)**, **Credit Note (Nota de Crédito)**, **Transport Document (Guia de Transporte)**, **Receipt (Recibo)** or **Cash VAT Receipt (Recibo de IVA de caixa)**. It is required. |
| **Series** | Empty | Identifier of the series as you communicate it to the AT, for example 2026A. Documents are numbered "TYPE SERIES/number" (FT 2026A/1). It accepts letters, digits, ".", "_" and "-", without spaces or "/". |
| **Journal** | Empty | A sales journal whose documents of this type the series numbers. One series corresponds to one journal. |
| **First Number** | 1 | Number of the first document, as it was communicated to the AT. It can be a different one if the series continues from another programme. |
| **Start Date** | Empty | Date from which the series is used. No document in the series carries an earlier date. |
| **Recovery of Manual Documents** | Unticked | Tick the series to record later any documents issued outside the programme. |
| **Recovers** | **Manual documents (M)** | Choose between **Manual documents (M)** and **Duplicates after restoring a backup (D)**. |
| **AT Validation Code** | Empty | Code the AT gave you when you communicated the series: 8 or more letters and digits. |
| **Communicated to the AT on** | Empty | Date on which you communicated the series to the AT. |

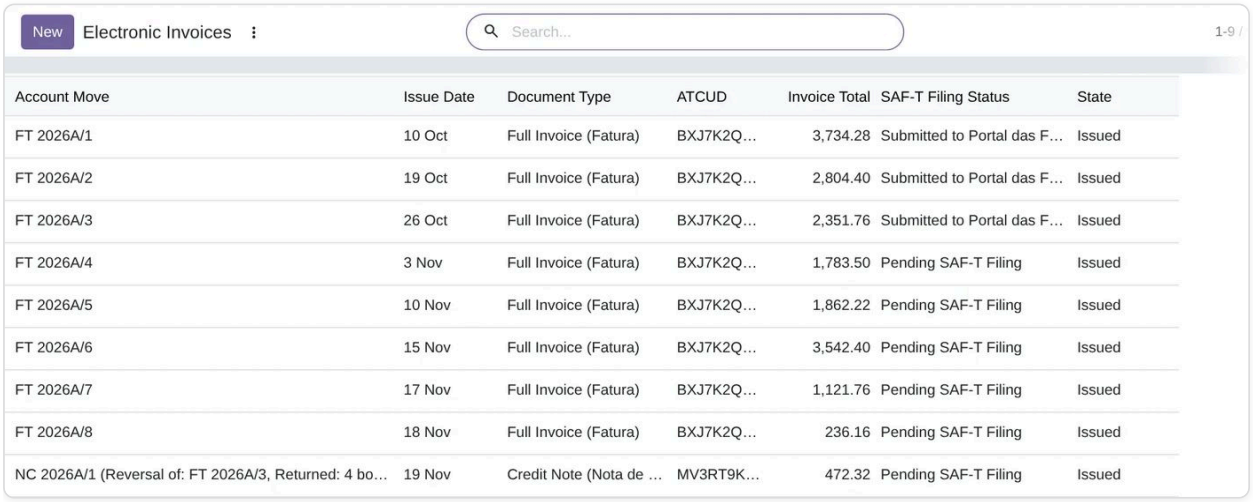
| OPTION | WHEN CREATED | WHAT IT DOES |
|---|---|---|
| **Active** | Ticked | Untick it to close a withdrawn series. |

The view also shows **Numbering**, **Software Certificate Number**, **Blocked by a Restoration**, **AT Status**, **Last AT Answer**, **State** and **Invoices with ATCUD**, but you do not choose them: the module fills in. Once an invoice has used the series, changing its type, its code or its numbering gives an error. A series communicated to the AT is not deleted: untick **Active** instead.

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# 7 Electronic Invoices

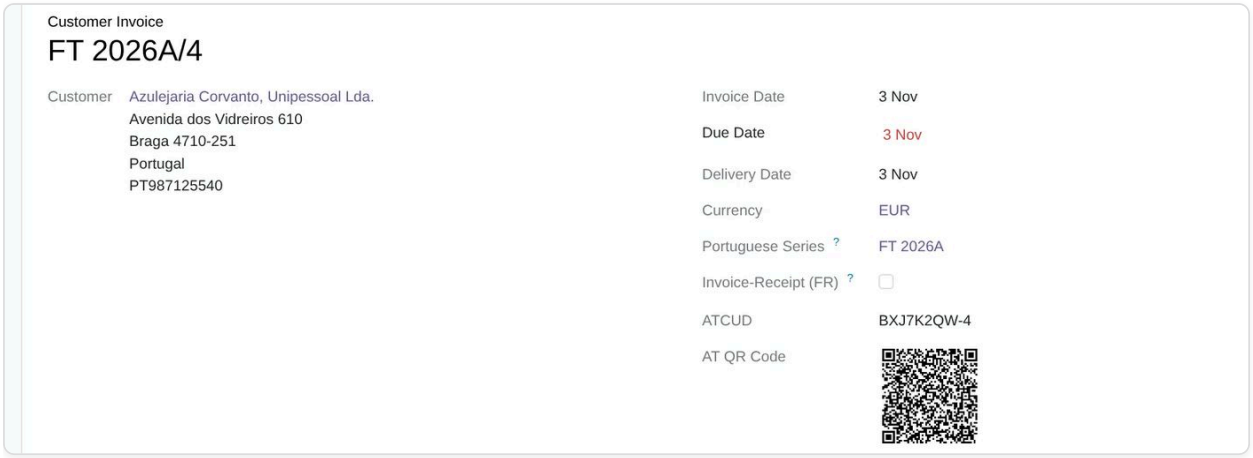
Each customer invoice you post in Odoo for a Portuguese company generates an electronic document with its state, its ATCUD and its payment terms.




| Account Move | Issue Date | Document Type | ATCUD | Invoice Total | SAF-T Filing Status | State |
|---|---|---|---|---|---|---|
| FT 2026A/1 | 10 Oct | Full Invoice (Fatura) | BXJ7K2Q… | 3,734.28 | Submitted to Portal das F… | Issued |
| FT 2026A/2 | 19 Oct | Full Invoice (Fatura) | BXJ7K2Q… | 2,804.40 | Submitted to Portal das F… | Issued |
| FT 2026A/3 | 26 Oct | Full Invoice (Fatura) | BXJ7K2Q… | 2,351.76 | Submitted to Portal das F… | Issued |
| FT 2026A/4 | 3 Nov | Full Invoice (Fatura) | BXJ7K2Q… | 1,783.50 | Pending SAF-T Filing | Issued |
| FT 2026A/5 | 10 Nov | Full Invoice (Fatura) | BXJ7K2Q… | 1,862.22 | Pending SAF-T Filing | Issued |
| FT 2026A/6 | 15 Nov | Full Invoice (Fatura) | BXJ7K2Q… | 3,542.40 | Pending SAF-T Filing | Issued |
| FT 2026A/7 | 17 Nov | Full Invoice (Fatura) | BXJ7K2Q… | 1,121.76 | Pending SAF-T Filing | Issued |
| FT 2026A/8 | 18 Nov | Full Invoice (Fatura) | BXJ7K2Q… | 236.16 | Pending SAF-T Filing | Issued |
| NC 2026A/1 (Reversal of: FT 2026A/3, Returned: 4 bo… | 19 Nov | Credit Note (Nota de … | MV3RT9K… | 472.32 | Pending SAF-T Filing | Issued |

- **Real Odoo 20 screenshot.** List of electronic documents with their ATCUD, total and state.

These documents are not created by hand: they are issued when you confirm the Odoo invoice, with the type that corresponds to that invoice. You see them in **Invoicing › e-Fatura › Invoices**, which opens the **Electronic Invoices** list. When you confirm the invoice, Odoo asks FlexigoTech Cloud for its signature: without a signature, the document is not issued and the invoice stays in draft.




- **Real Odoo 20 screenshot.** Invoice FT 2026A/4, already confirmed: its **Portuguese Series**, the ATCUD and the **AT QR Code**.

### Document buttons

| | |
|---|---|
| **Issue Invoice** | Appears only with the document in **Draft**. Assigns the ATCUD from the series and the Odoo number, generates the QR code and locks the document. |
| **Communicate to e-Fatura** | Appears with the document in **Issued** as long as it has not been communicated. It asks for the e-Fatura sub-user and its password, for that submission only. |
| **Verify audit chain** | Hidden in **Draft**. Recalculates the hash chain of the document's audit entries. |
| **View Audit Trail** | Opens the audit entries for that document. |

### States

- **Draft**
- **Issued**
- **Submitted to AT**
- **Cancelled (via Credit/Debit Note)**

In the **Totals** tab you see the taxable base, the VAT amount and the total. In **QR Code** you see the code and its hash. In **Audit** you see the trail of changes to the document. The **e-Fatura webservice** group stores e-Fatura's answer to the last submission.

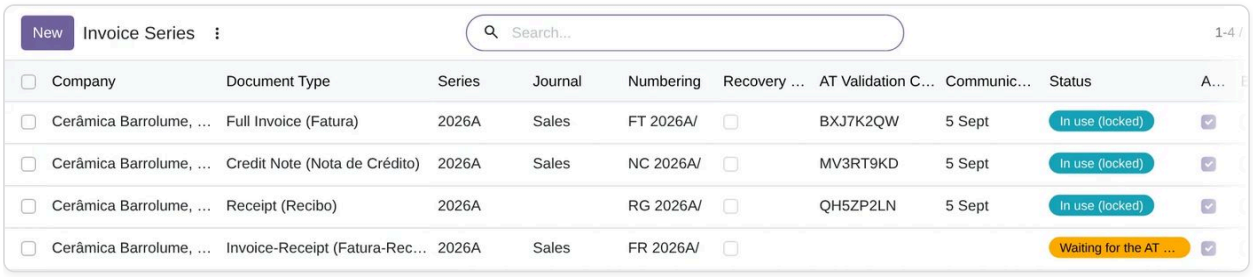
The payment terms of each invoice are recorded in **Invoicing › e-Fatura › Payment Terms**. You can choose **Net 30 Days**, **Net 60 Days** or **2/10 Net 30 (early payment discount)**, with their due date.

> Once issued, the document is not modified or deleted: it is corrected with a credit or debit note. A document already issued is not issued again either.

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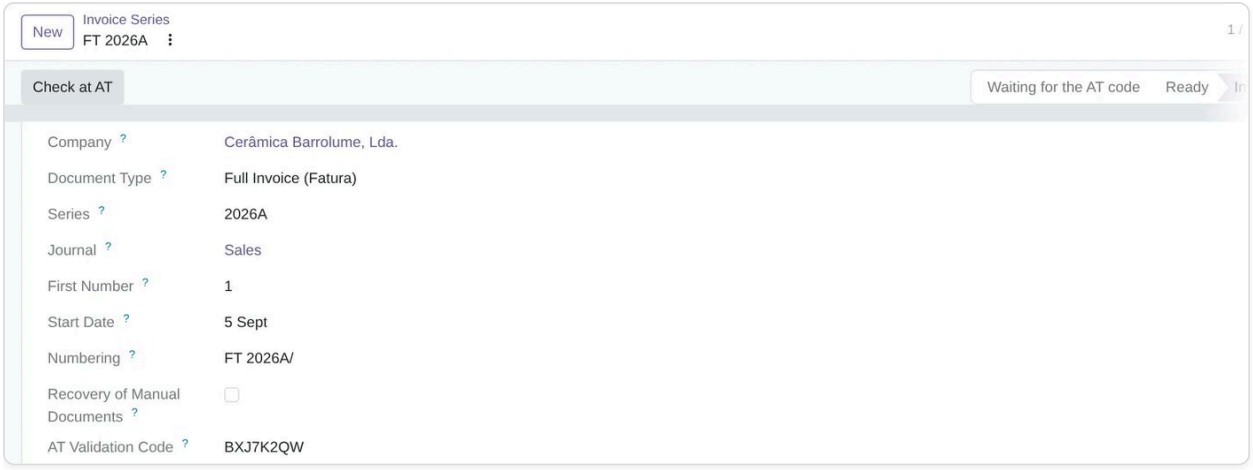
# 8 Series and ATCUD

Each series is a combination of document type and AT validation code, and marks the number assigned to the next document.




- **Real Odoo 20 screenshot.** The company's series, each with its journal, its numbering and its AT validation code.

You create the series yourself in **Invoicing › e-Fatura › Configuration › Invoice Series**. The validation code is given to you by the AT when you communicate the series on the Portal das Finanças. You type it into **AT Validation Code**, or the connector picks it up when you communicate the series from Odoo with **Communicate to AT**.




- **Real Odoo 20 screenshot.** The form of a series, with its numbering, the AT validation code and its state.

## Record buttons

| | |
|---|---|
| **Communicate to AT** | Opens the wizard to send the series to the AT. Hidden if the series already has a validation code or if it is from an earlier version without an identifier. |
| **Check at AT** | Queries the state of the series at the AT. Hidden while the series has no validation code. |
| **Finalize at AT** | Closes the series at the AT. Only visible if the series is **Active at the AT**. |
| **Annul communication** | Annuls a communication made by mistake. Only visible if the series is **Active at the AT** and has not yet issued any ATCUD. |

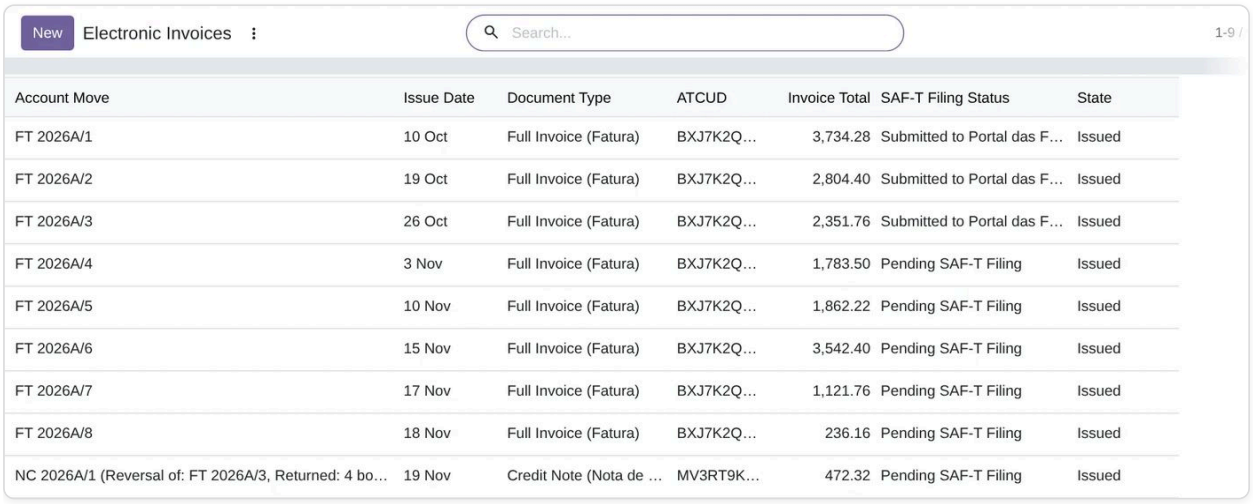
## States

The **State** field can be **Waiting for the AT code**, **Ready**, **In use (locked)** or **Without identifier (version 1.1): numbers nothing new**. **AT Status** shows the AT's last answer: **Not communicated from Odoo**, **Active at the AT**, **Finalized at the AT** or **Annulled at the AT**.

> A series communicated to the AT, or one that has already issued the ATCUD of some invoice, is not deleted: it is closed by unticking **Active**.

# 9 Communication to e-Fatura

From a wizard you send issued documents to e-Fatura and, from the invoice itself, you annul a Portuguese document.




| Account Move | Issue Date | Document Type | ATCUD | Invoice Total | SAF-T Filing Status | State |
|---|---|---|---|---|---|---|
| FT 2026A/1 | 10 Oct | Full Invoice (Fatura) | BXJ7K2Q… | 3,734.28 | Submitted to Portal das F… | Issued |
| FT 2026A/2 | 19 Oct | Full Invoice (Fatura) | BXJ7K2Q… | 2,804.40 | Submitted to Portal das F… | Issued |
| FT 2026A/3 | 26 Oct | Full Invoice (Fatura) | BXJ7K2Q… | 2,351.76 | Submitted to Portal das F… | Issued |
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| FT 2026A/6 | 15 Nov | Full Invoice (Fatura) | BXJ7K2Q… | 3,542.40 | Pending SAF-T Filing | Issued |
| FT 2026A/7 | 17 Nov | Full Invoice (Fatura) | BXJ7K2Q… | 1,121.76 | Pending SAF-T Filing | Issued |
| FT 2026A/8 | 18 Nov | Full Invoice (Fatura) | BXJ7K2Q… | 236.16 | Pending SAF-T Filing | Issued |
| NC 2026A/1 (Reversal of: FT 2026A/3, Returned: 4 bo… | 19 Nov | Credit Note (Nota de … | MV3RT9K… | 472.32 | Pending SAF-T Filing | Issued |

- **Real Odoo 20 screenshot.** List of electronic documents with their ATCUD, their state and the state of their SAF-T filing.

Nothing is communicated automatically: there is no scheduled task that sends documents. Each submission goes out when you open the **Communicate to e-Fatura** wizard on the documents you want to communicate and type the sub-user and its password. The password is used only for that submission and is never stored. This communication has been tested with simulated answers; there is no record of a submission completed with the real AT.

## The submission wizard

| | |
|---|---|
| **Documents** | The documents being communicated. They are filled in and cannot be changed. |
| **Sub-user** | The sub-user with the e-Fatura webservice service profile, in the format "<NIF>/<sub-user number>". |
| **Password** | That of the sub-user. Used only in this submission. |
| **e-Fatura Answer** | e-Fatura's answer to the submission. Read-only. |
| **Send to e-Fatura** | Sends the documents. |
| **Cancel** | Closes the wizard without sending anything. |

## Annulling a document

1. **Open the invoice**
   The **Annul** button only appears on posted documents that already have an ATCUD. It is visible to users with invoicing permissions.
2. **Write the reason**
   It is mandatory and goes to the SAF-T, with 50 characters at most.
3. **Type the sub-user and its password**

Needed only if the document was communicated to e-Fatura.

4 **Press Annul**

The document keeps its number and its signature, and goes to the SAF-T as annulled.

> An annulled document cannot be corrected with a credit note. Nor is a document annulled if it is already corrected by a credit or debit note, or if it has a reconciled payment. If e-Fatura does not accept the annulment, the document is not annulled.

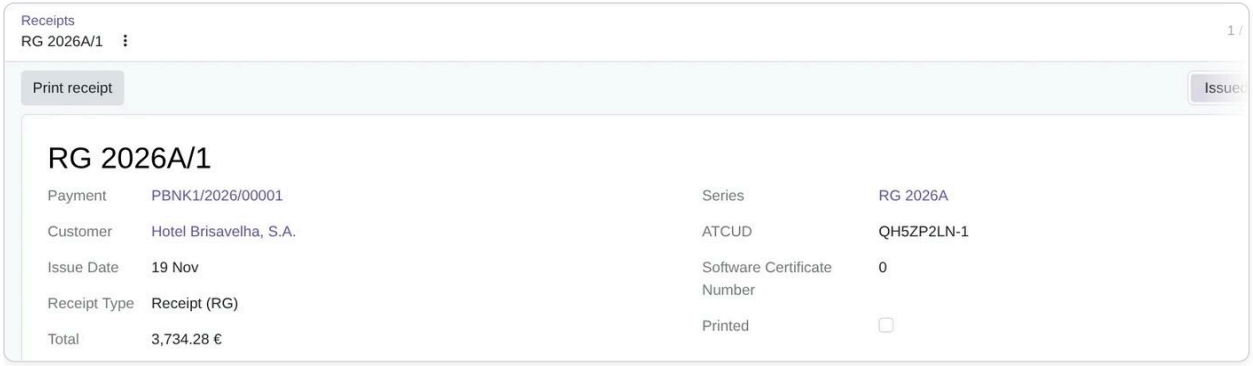


# 10 Receipts

Portuguese receipts are generated from the payments received from your customers and are consulted in the **Receipts** list.

Each confirmed payment from a customer for Portuguese invoices issued with their ATCUD has its receipt. It is generated only when the payment is registered from the invoice, and also manually from the payment with the **Issue receipt** button. If something prevents its issue, the reason is noted on the payment, which is registered anyway, and the **Issue receipt** button remains available.

The **Receipts** menu opens the list with all the receipts issued.




- **Real Odoo 20 screenshot.** Receipt RG 2026A/1 for a customer payment, with its series, its ATCUD and the **Print receipt** button.

| | |
|---|---|
| **Issue receipt** | Located on the payment form. Visible on a payment received from a customer, already paid or reconciled, that does not yet have a receipt. |
| **Print receipt** | It appears on the payment and on the receipt itself. On the payment it shows once the payment has a receipt. The first PDF is the original and the following ones carry "2.ª via". |

## States

| | |
|---|---|
| **Issued** | The receipt is valid. It is the state it is born with. |
| **Annulled** | The receipt was annulled. The date is recorded in **Annulled on**, the **Reason for the Annulment** and who annulled it in **Annulled by**. |

### How to correct a receipt

1. **Set the payment back to draft**
   The receipt is annulled.

2. **Validate the payment again**
   A new receipt is issued.

> An issued receipt is not modified and is never deleted. To correct it, its payment must be set back to draft, and the receipt is annulled. A payment reconciled with invoices issued with ATCUD cannot be rejected: cancel it, which removes its reconciliation and annuls its receipt.



# 11 Monthly SAF-T

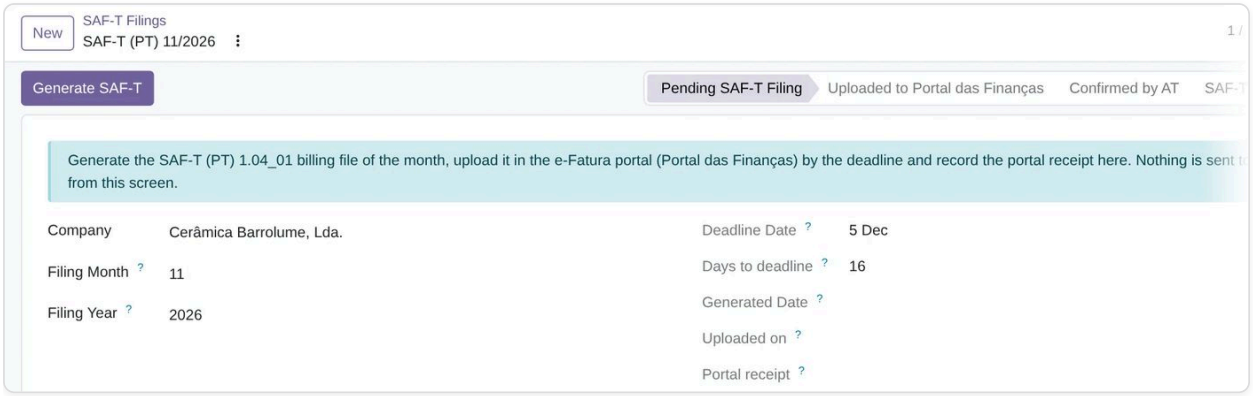
In **Invoicing › e-Fatura › Reports › SAF-T Filings** you prepare the SAF-T file for each month, track its deadline and record the submission to the e-Fatura portal.




- **Real Odoo 20 screenshot.** The list with one record per month for the company, with the deadline and the state of the filing.

Each record is one month of invoices for one company. You create them with the **Create missing months** button on the list: it generates one record for each month of this year up to today that does not yet have one, for every active company. The module does not set up any scheduled action for this process.

In the record, the submission month and year are those of the invoices. The **Deadline Date** fills in by itself: day 5 of the following month, the deadline under Decreto-Lei 198/2012 (art. 3.º, n.º 2) for reporting invoices to the AT. **Days to deadline** turns negative once the deadline has passed.




- **Real Odoo 20 screenshot.** The record for a month not yet generated, with the button that generates the file and the deadline date.

| | |
|---|---|
| **Generate SAF-T** | Builds the month's file with the Portuguese invoices and their ATCUD, validates it against the official XSD and stores it in **SAF-T file**. It only appears with the state **Pending SAF-T Filing** or **SAF-T Filing Failed**. |
| **Download** | Downloads the generated file. It only appears once a file exists. |
| **Record portal upload** | Opens a wizard to record the receipt the portal gave you. It only appears if a file exists and the state is **Pending SAF-T Filing** or **SAF-T Filing Failed**. |

## States

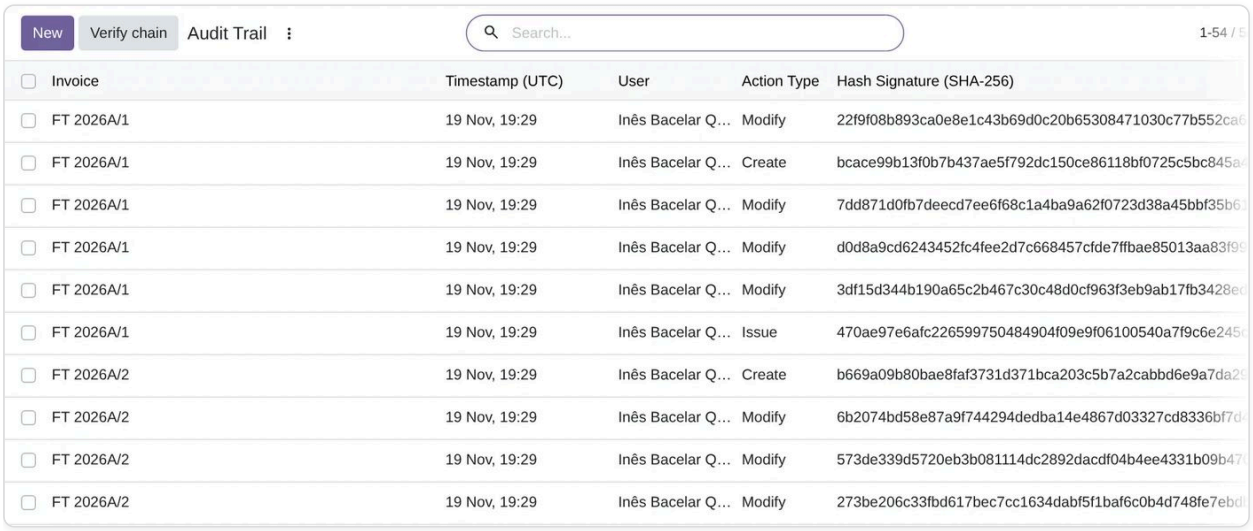
| STATE | MEANING |
|---|---|
| **Pending SAF-T Filing** | The record is created and the file still needs to be generated or uploaded. |
| **Uploaded to Portal das Finanças** | You have recorded the upload with the portal receipt. |
| **Confirmed by AT** | The module never sets this: Odoo does not receive the AT's response to the file you upload. |
| **SAF-T Filing Failed** | The filing failed. You can generate the file again. |

1. **Generate the file**
   Press **Generate SAF-T** on the month's record.
2. **Download it**
   Press **Download** and upload the file yourself on the e-Fatura portal.
3. **Record the receipt**
   Press **Record portal upload**, enter the **Portal receipt**, add **Portal notes** if you wish and press **Record upload**.

> The connector sends nothing to the portal: you upload the file, and here you only record the receipt. The SAF-T is kept in euros, and the company's currency must be EUR. State and date data are set with the buttons, not typed by hand.

# 12 Audit

The audit trail records every action on an e-Fatura invoice and lets you verify that nobody has tampered with it.




- **Real Odoo 20 screenshot.** The audit trail list, with the timestamp, user, action type and hash signature.

You find it under **Invoicing › e-Fatura › Reports › Audit Trail**. Each row is one action on an invoice. Each row is chained to the previous one through a SHA-256 hash signature, so any later change can be detected.

The module creates the entries by itself, whenever someone acts on an invoice. The scheduled action **e-Fatura: integrity check of the signed documents** reviews the signed documents every day and records in this trail any discrepancies it finds.

## Buttons on the trail

| | |
|---|---|
| **Verify chain** | Checks the entries you see in the list, or the selected ones. Each invoice has its own chain. If it finds a tampered entry, it stops at the first one and shows an error warning of the tampering. |
| **New** | It appears in the list, but the entries are created by the module. |

## Columns you see

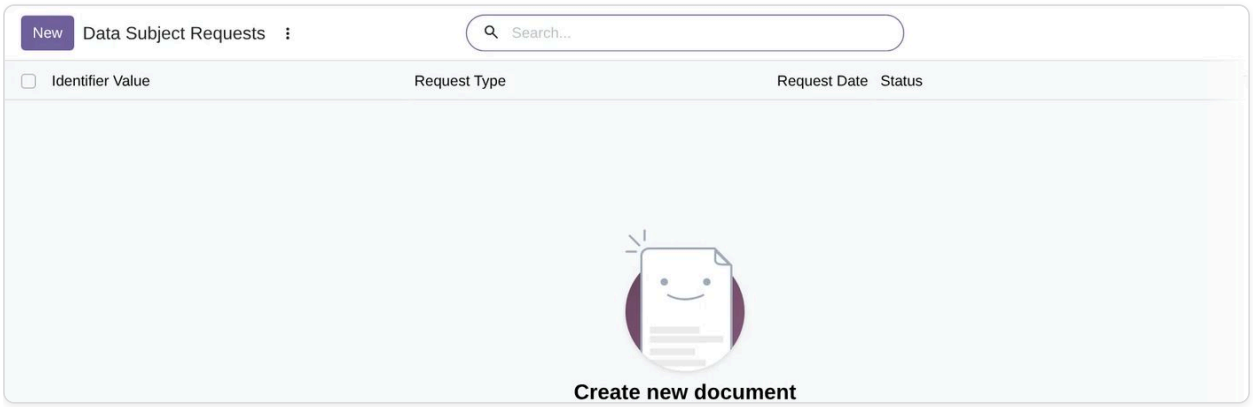
| | |
|---|---|
| **Invoice** | The invoice acted upon. |
| **Timestamp (UTC)** | When it happened. |
| **User** | Who did it. |
| **Action Type** | What happened. |
| **Hash Signature (SHA-256)** | The chain that detects tampering. |

> Entries cannot be modified or deleted. If you try, Odoo replies "Audit trail is immutable and cannot be modified" or "Audit trail is immutable and cannot be deleted".

# 13 GDPR

In this list you record data subjects' requests for access and erasure of their data and take them through to archiving.

They are in **Invoicing › e-Fatura › GDPR › Data Subject Requests**. Each request is entered by hand, with the company, the type of identifier (email, NIF or company name), its value and the request type. None arrives automatically from the platform.




- **Real Odoo 20 screenshot.** The list of data subject requests, still empty.

## Buttons on the record

| | |
|---|---|
| **Verify Identity** | Confirms the identity of the data subject. It appears with the request in **Pending**. |
| **Assess** | Checks whether there is any tax withholding. It appears with the request in **Identity Verified**. |
| **Compile Response** | Prepares the text of the response. It appears with the request in **Assessed**. |
| **Deliver Response** | Sends the response by email. It appears with the request in **Assessed**. |
| **Archive** | Archives the request. It appears with the request in **Responded**. |

## States

The request's **State** moves through **Pending**, **Identity Verified**, **Assessed**, **Responded** and **Archived**.

## Archived and deleted

The scheduled action **e-Fatura: delete data subject requests archived for 3 years** runs every day and deletes requests archived 3 years ago.

> You cannot delete a request that is not archived: Odoo replies "Cannot delete active DSAR request; must be archived first".

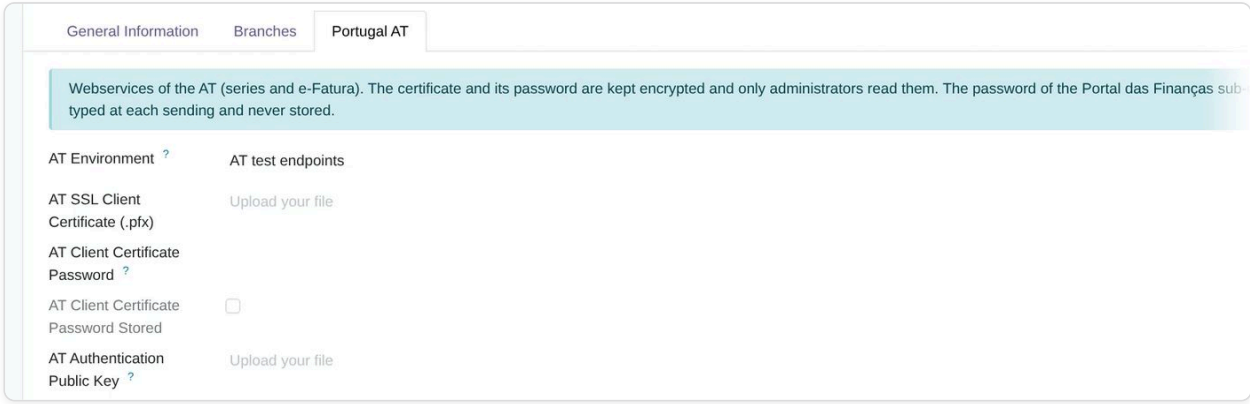
# 14 Tax data

The connector adds Portuguese tax data to the company and to taxes, and protects that of contacts, products and users once documents have been issued.

| | |
|---|---|
| **AT Environment** | In the company settings, **Portugal AT** tab. It can be **AT test endpoints** or **AT production endpoints**. It defaults to **AT test endpoints** and is mandatory. |
| **AT SSL Client Certificate (.pfx)** | On that tab you upload the file the AT uses for signing. Only system administrators can see it. |
| **AT Client Certificate Password** | You enter it on that tab and it is stored encrypted. If you leave it empty, the current one is kept. **AT Client Certificate Password Stored** shows whether one is already saved. |
| **AT Authentication Public Key** | Uploaded on that tab. It accepts the .cer, PEM or DER file, or the public key from the Portal das Finanças. |
| **SAF-T tax code** | On the **Portugal (e-Fatura)** tab of the tax. Options: RED (reduced rate), INT (intermediate rate), NOR (normal rate), ISE (exempt) and OUT (other VAT special regimes). |
| **Tax space** | On the same tab of the tax. Defaults to PT. Accepts PT, PT-AC (Azores), PT-MA (Madeira) or a two-letter country code. |
| **VAT exemption reason** | On the same tab. Required when the rate is 0%. |
| **Withholding tax (Portugal)** | On the same tab. Options: IRS (personal income tax), IRC (corporate income tax) and IS (stamp duty). |
| **Legal basis of the withholding** | On the same tab. It is the legal provision for the withholding or, for stamp duty, the code of its item. |

### 1 Open the company settings

Go to the **Portugal AT** tab.




- **Real Odoo 20 screenshot.** The company's **Portugal AT** tab, with the **AT Environment**, the customer certificate and the AT public key.

### 2 Choose the AT Environment

Leave it on test while you are testing.

### 3 Upload the certificate and the public key

Upload the **AT SSL Client Certificate (.pfx)** and the **AT Authentication Public Key**.

4 **Enter the certificate password**

It is stored encrypted.

5 **Classify each VAT tax**

Open the tax, go to **Portugal (e-Fatura)** and fill in the SAF-T code and, if needed, the exemption reason.

> A customer with issued documents cannot change its NIF, unless it is empty or is the generic final consumer NIF. A customer with issued documents and no NIF cannot change its name until its NIF is filled in. A product with issued documents cannot change its name. A tax used on a signed document cannot be modified or deleted: it is archived. A user who has issued Portuguese documents is not deleted: it is archived.

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# 15 What happens automatically

The connector ships two scheduled actions, both active when installed.

| ACTION | FREQUENCY | WHAT IT DOES |
|---|---|---|
| **e-Fatura: integrity check of the signed documents** | Every day (active). Also runs when Odoo starts. | Checks the integrity of the signed documents of each company that signs. Every night, and when Odoo starts, all of them are reviewed. |
| **e-Fatura: delete data subject requests archived for 3 years** | Every day (active) | Permanently deletes data subject requests that have been archived for 3 years. |

Frequencies are changed in **Settings › Technical › Automation › Scheduled Actions**, with developer mode enabled.

> No task communicates documents to e-Fatura. You launch each submission yourself with **Communicate to e-Fatura** and enter the sub-user password at that moment, because it is not stored anywhere.

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# 16 If something fails

When something fails, it is almost always one of these cases.

| | |
|---|---|
| **Without a trial or subscription, or with FlexigoTech Cloud offline, the invoice is not issued** | FlexigoTech Cloud performs the signing. If it does not sign, the document is not issued and the invoice stays in draft. In **Settings**, in the FlexigoTech Cloud block, check that the connection is active and that the trial or subscription is in force. |
| **The AT client certificate is missing** | The warning "Upload the SSL client certificate signed by the AT (.pfx) in the company settings (Portugal AT tab)." appears. Upload it in the **Portugal AT** tab of the company. |

| | |
|---|---|
| **The Portal das Finanças public key is missing** | The warning "Upload the public key of the Portal das Finanças authentication system (sent by the AT on request) in the company settings." appears. Upload it in the **Portugal AT** tab of the company. |
| **The sub-user or its password is missing** | "The AT sub-user and its password are required." appears. Enter them in the **Communicate to e-Fatura** wizard; the password is used only for that submission and is not stored. |
| **The series has no AT validation code** | Open the series in **Invoicing › e-Fatura › Configuration › Invoice Series** and enter the code the AT gave you, or run **Communicate to AT**. |
| **You do not know what e-Fatura replied** | The response is written to the document, errors included. Open it in **Invoicing › e-Fatura › Invoices** and check the **e-Fatura webservice** group. The history of each invoice is in **Invoicing › e-Fatura › Reports › Audit Trail**. |
| **A database copy does not sign** | The warning "This database is a copy: it does not sign documents with the production key. Register it in FlexigoTech Cloud as a test database." appears. Registered that way, it signs with the test key, which is not valid before the AT. |
| **Another database has the company's NIF** | You see "The NIF of this company is registered by another database in FlexigoTech Cloud: write to support to move it to this one." Write to us and we will move it to your database. |
| **The subscription does not allow more NIFs** | You see "This database already signs for the most NIFs its subscription allows." Each Portuguese company that signs counts as one NIF. |

If FlexigoTech Cloud does not sign, the document is not issued and the invoice remains in draft. When it is available again, confirm the invoice again. If you cannot wait, issue the document by hand and register it afterwards in a recovery series for manual documents.

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# 17 Support

Every purchase includes 2 months of support: we help you install it, set it up and get it working, by email and video call. While you're subscribed, support for the service stays included.

On the Standard plan we respond within 1 business day; on the Pro plan, within 4 business hours, and if needed we can review it by video call. Tell us your Odoo version, the module version and, if there is an error, its full text.

### Email

To install it, set it up or for any question.
comercial@flexigotech.com

### On the web

The module page, with the guide and the prices.
flexigotech.com/en/portugal-efatura-e-invoice-connector.html

### On Odoo Apps

The module page on the Odoo store.
apps.odoo.com

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