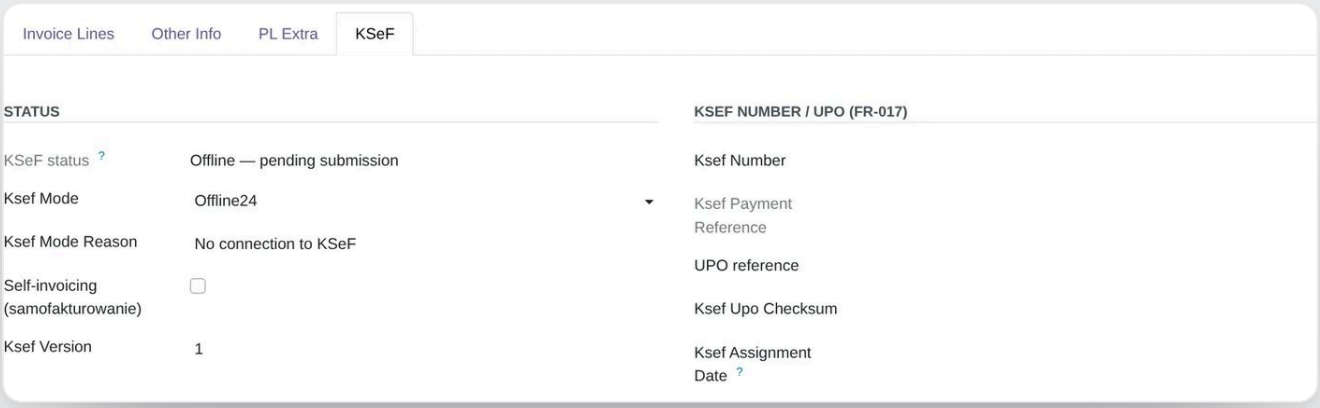
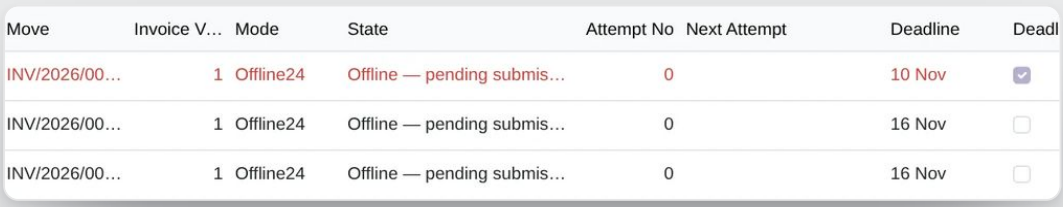
USER MANUAL · E-INVOICING & TAX

Poland KSeF 2.0 Validator for Odoo

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

Module version 20.0.1.2.8 | Odoo 20 screenshots | Edition of 15-11-2026





Move	Invoice V…	Mode	State	Attempt No	Next Attempt	Deadline	Deadl
INV/2026/00…	1	Offline24	Offline — pending submis…	0		10 Nov	☑
INV/2026/00…	1	Offline24	Offline — pending submis…	0		16 Nov	☐
INV/2026/00…	1	Offline24	Offline — pending submis…	0		16 Nov	☐

Real Odoo 20 screenshot. The KSeF tab of an invoice issued in offline mode and the queue of invoices ready for upload.

Contents

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

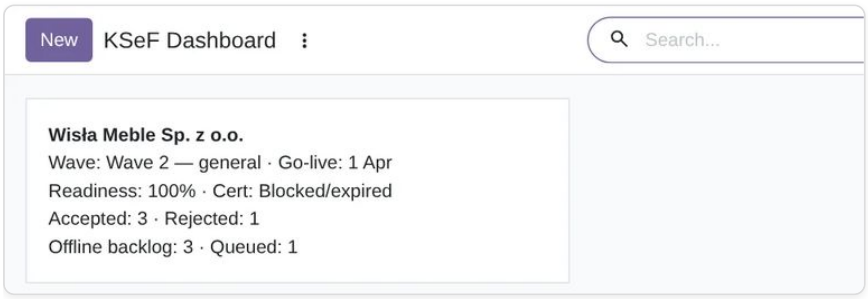
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This manual describes version 20.0.1.2.8 of the module (Odoo branch 20.0, commit 36ff5ff6e). Everything it says comes from its code: menus, buttons, fields, scheduled actions and error messages.

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 to find it

The module prepares and monitors the passage of your invoices through KSeF 2.0: it checks the data, validates the FA(3), tracks its status and warns you about anything that is about to expire. l10n_pl_edi handles sending to KSeF.



- **Real Odoo 20 screenshot.** The dashboard, with one card per company.

KSeF › Dashboard	The dashboard: one card per company showing its mandate wave, its date, the readiness score as a %, the status of its credentials, and the counts of accepted, rejected and pending offline invoices.
KSeF › Migration › Run Validator	Runs the migration validator on a company's contacts and invoices.
KSeF › Migration › Validation Runs	The validator runs, with their passes, failures and readiness score.
KSeF › Operations › Submission Queue	The queue: one line per invoice and version, with its mode, its status and its deadline.
KSeF › Operations › Inbound Invoices	Received invoices, which are entered by hand or imported.
KSeF › Operations › Compliance Export	The CSV export of invoices with a KSeF status.
KSeF › Configuration › Compliance Profile	Each company's profile with its mandate wave and its mandate date.
KSeF › Configuration › Credentials	The inventory of KSeF credentials, with a warning before they reach their end date.
KSeF › Configuration › Authorizations	The manual record of who is authorised in KSeF and for which NIP.
KSeF › Configuration › Legal Policy	The legal dates and thresholds used by the profile.
KSeF › Configuration › Error Codes	The reference catalogue of the 69 official error codes of the KSeF 2.0 API.
KSeF › Configuration › Audit Log	The audit log, which cannot be edited.

Outside its own menu, the module adds the **KSeF** tab to invoices and credit notes, both customer and vendor, with buttons such as **Mark ready for KSeF upload**, **Validate FA(3) (FlexigoTech Cloud)** and **Mark accepted by**

KSeF. In the invoice list it adds two actions: **Validate FA(3) (FlexigoTech Cloud)** and **Mark Offline / Emergency**. In Settings it adds the **Poland KSeF 2.0** block. Its scheduled tasks are active as soon as it is installed. Its screens appear in English in every language.

2 Before you start

This is what you need in your Odoo and on your machine before installing the module.

- Odoo 17, 18, 19 or 20 on Odoo.sh or on your own server. It does not work on Odoo Online.
- Invoicing and the Polish localisation (l10n_pl). With these and FlexigoTech Cloud, the module works on both Community and Enterprise.
- To send to KSeF from Odoo, l10n_pl_edi, which exists in Odoo 18 to 20. It does not exist in Odoo 17, where the FA(3) is uploaded as a file on each invoice.
- Users with a KSeF group: **KSeF Read-only**, **KSeF Accountant** or **KSeF Administrator**. A user without a KSeF group does not see the **KSeF** menu.
- A FlexigoTech Cloud subscription or its 14-day trial. This is the service that validates the FA(3).
- A **KSeF Administrator** of the company who accepts the cloud consent. Until then, the FA(3) is not sent for validation.

> The module does not connect to KSeF and does not send invoices: l10n_pl_edi does the sending from **Send**, with the option "by KSeF (e-Faktura)". It does not upload or download anything from KSeF either. You enter received invoices by hand. It does not use the credentials: it stores them as an inventory and warns you of their end date. "Valid" means that the FA(3) passes FlexigoTech Cloud's check against the official KSeF schema, not that KSeF has accepted it.

3 Installation

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

How to get it

From its page on Odoo Apps (https://apps.odoo.com/apps/modules/20.0/flexigo_poland_ksef_2_0_e_invoice_connector_and_migrati) or from the module page on flexigotech.com. Choose the version of Odoo you use: each version is a separate module.

The module depends on `flexigotech_cloud`, the connection to FlexigoTech Cloud. On Odoo Apps, the module page lists it under "Community Apps Dependencies" and its price already includes it; it is also 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_poland_ksef_2_0_e_invoice_connector_and_migrati` 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** (in developer mode), search for "Poland KSeF 2.0 Validator" and click **Activate**.

On your own server

1. **Copy the folders**
   Leave `flexigo_poland_ksef_2_0_e_invoice_connector_and_migrati` and `flexigotech_cloud` in a folder that is in your Odoo's `addons_path`.

2. **Restart Odoo**
   That way it picks up the new modules.

3. **Install the app**
   In **Apps**, **Update Apps List**, search for "Poland KSeF 2.0 Validator" and click **Activate**.

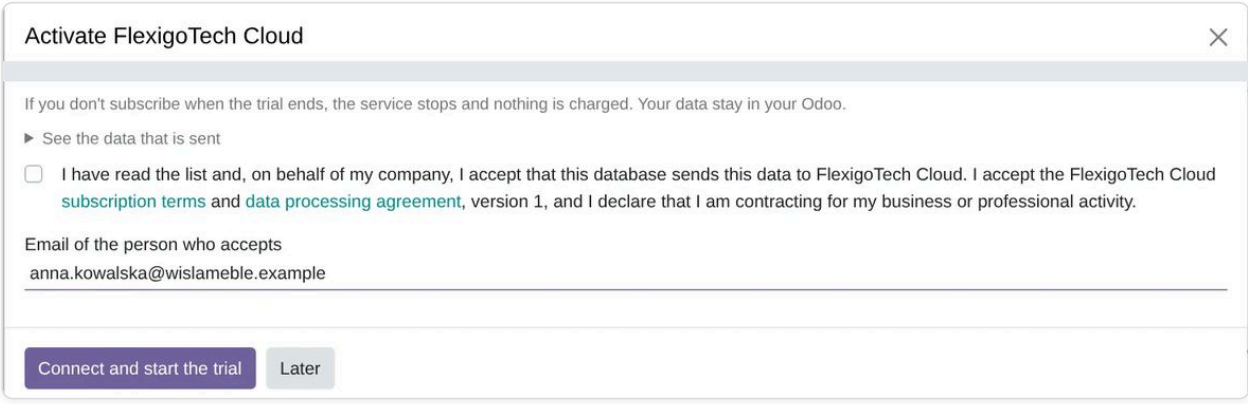
> When you install it, Odoo also installs the apps the module depends on: Invoicing and the Polish localisation (l10n_pl). If you already use them, nothing you have changes.

USER MANUAL · KSEF 2.0

4 Activating FlexigoTech Cloud: the 14-day trial

FA(3) validation runs on FlexigoTech Cloud, FlexigoTech's service. Until the database is connected and the module has a trial or a subscription, FlexigoTech Cloud does not validate any FA(3).

1. **Click Activate in the top bar**
   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**

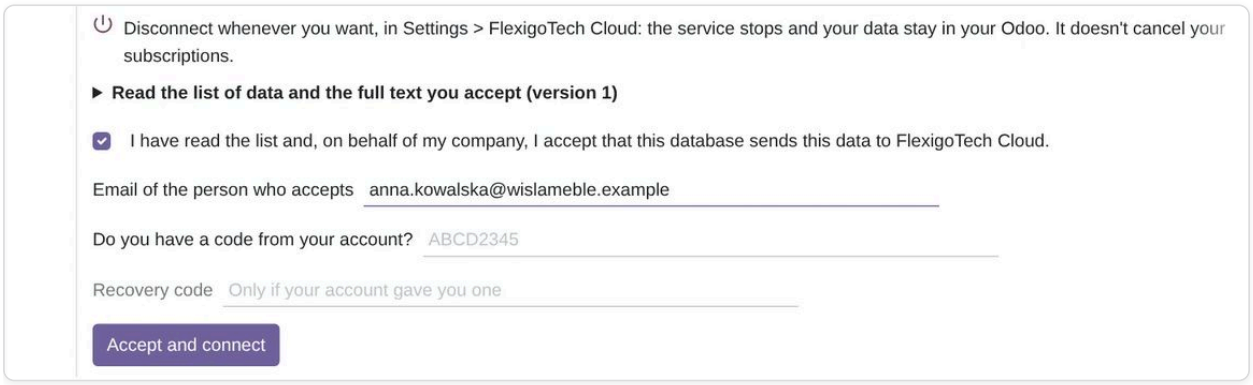
Tick "I have read the list and, on behalf of my company..." (it includes the subscription terms and the data processing agreement) and enter the **Email of the person who accepts**.

3 **Click Connect and start the trial**

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

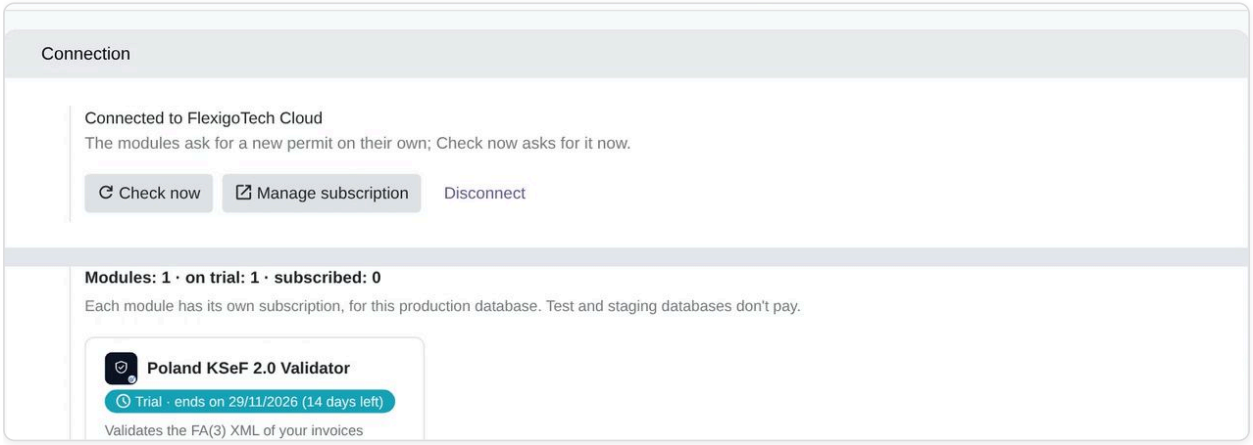
The same, from Settings

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



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

Once the database is connected, the **Modules** block shows each module with its status: **Trial** and the date it ends, **Subscribed**, and so on. From there you choose the plan (Standard or Pro, monthly or annual) 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 module on trial.

PLAN	PRICE	INCLUDES
Standard	€29 per month or €290 per year	Support response within 1 working day
Pro	€58 per month or €580 per 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 you are not charged anything; your data stays in your Odoo. **Check now** requests the permission immediately (otherwise, the module renews it on its own every 6 hours).

> You cannot start a trial 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."

5 Getting it running

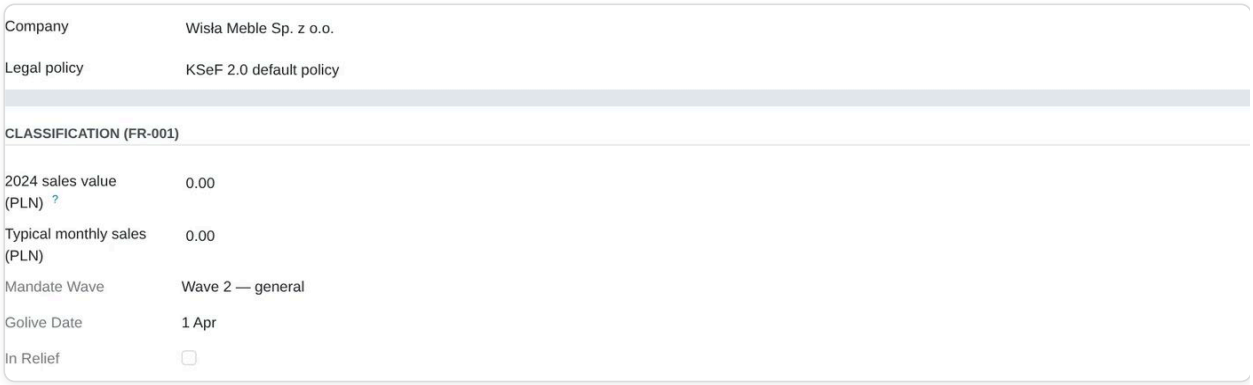
You do this once, after starting the FlexigoTech Cloud trial.

1 Give each user their KSeF group

Assign **KSeF Read-only** to anyone who only reads, **KSeF Accountant** to anyone who runs the validator, exports and marks invoices, and **KSeF Administrator** to anyone who configures. Only the **KSeF Administrator** sees the **Configuration** menu.

2 Open the compliance profile

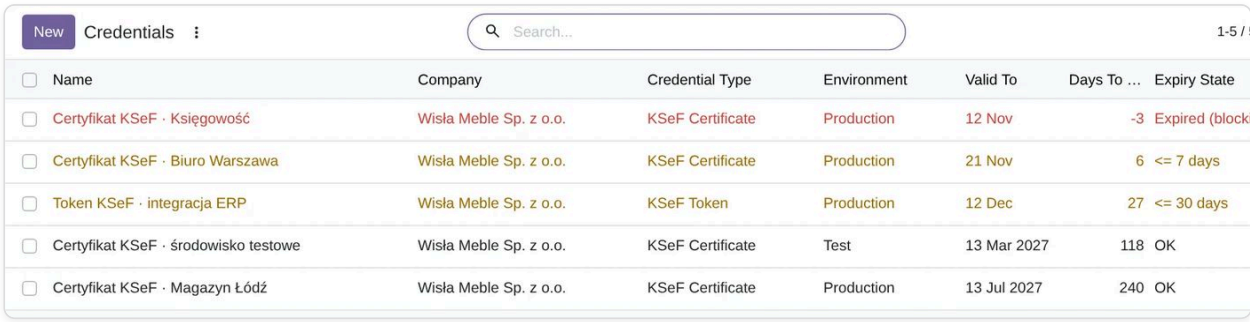
Go to **KSeF › Configuration › Compliance Profile** (if the company does not have a profile yet, create it with **New**). Enter **2024 sales value (PLN)** and **Typical monthly sales (PLN)**. The module calculates **Mandate Wave** and **Golive Date** with the legal policy, using only the figures you enter. Check the wave and the date that come out. There is no need to click **Enable production**: it does not connect anything to KSeF.



- **Real Odoo 20 screenshot.** A company's compliance profile with its sales, its wave and its start date.

3 Enter the credentials

In **KSeF › Configuration › Credentials**, add each credential with its type, its holder and the **Valid From** and **Valid To** dates. With the end date, the module warns you before it expires. There is no need to enter the secret: the module does not use it.



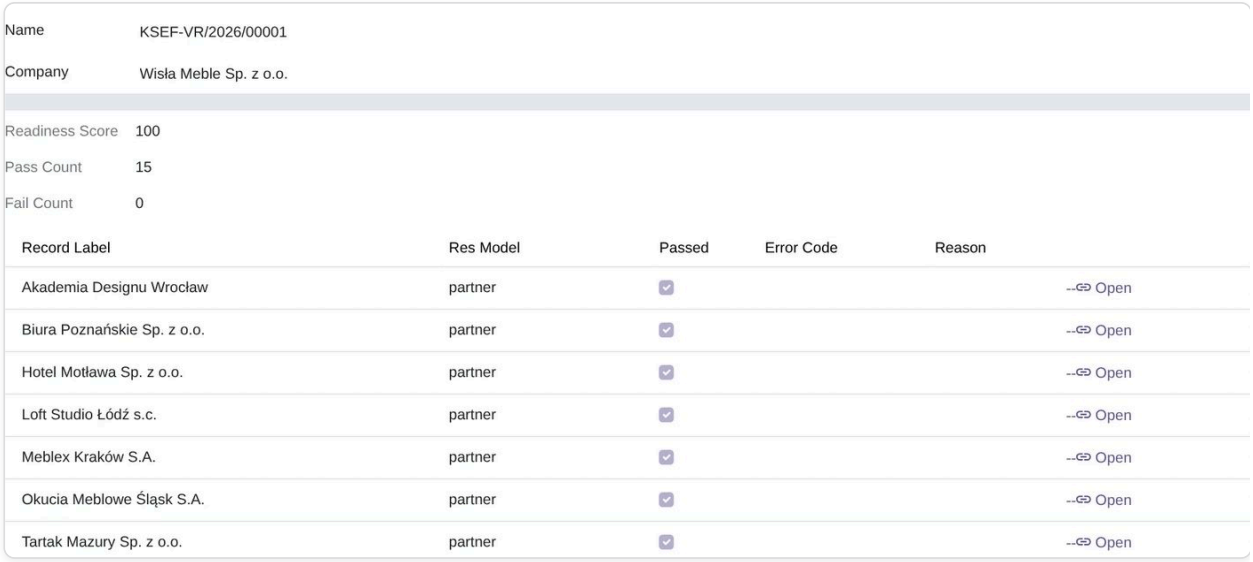
- **Real Odoo 20 screenshot.** List of credentials with their expiry status.

4 Record the authorisations

If an accounting office works on your behalf or you issue self-invoices, register it in **KSeF › Configuration › Authorizations**. A self-invoice only passes the check if there is an active **Self-invoicing** or **Accounting office** authorization.

5 Run the migration validator

Open **KSeF › Migration › Run Validator**, choose the company and **Scope** and click **Run validation**. Each line with a failure has its **Open** button to go to the record and fix it. You can repeat the run with **Run**. The result is saved in **Validation Runs** with its **Readiness Score**.



- **Real Odoo 20 screenshot.** Result of a validator run, line by line.

6 Validate the first FA(3) and accept the consent

On a posted customer invoice, click **Validate FA(3) (FlexigoTech Cloud)** in the **KSeF** tab. Before the company's first FA(3) is sent, the **Validate FA(3) files in FlexigoTech Cloud** screen appears. A **KSeF Administrator** clicks **Accept and validate**. Other users do not see the accept button.



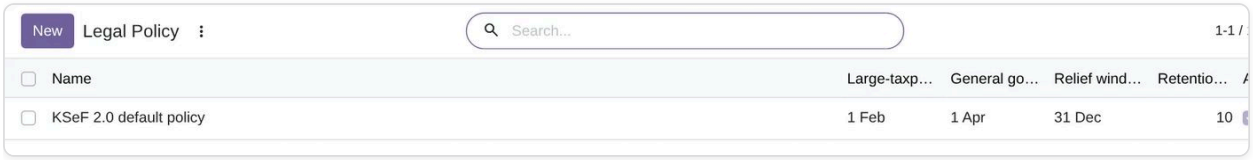
- **Real Odoo 20 screenshot.** The list of validator runs with their readiness score.

The profile shows its wave and its date, and the **KSeF › Dashboard** panel shows one card per company with the wave, the **Readiness Score** and the status of the credentials. Once running, the scheduled tasks work on their own. Every day, **KSeF: certificate expiry alerts** warns you of credentials that are 30, 14, 7 or 1 day from their end and of any that has expired, with a pending task for a **KSeF Administrator** of the company. **KSeF: offline deadline scan** and **KSeF: authorization alerts** only recalculate flags and statuses. Every hour, **KSeF: validate again the FA(3) sent (FlexigoTech Cloud)** validates the FA(3) that KSeF received for the invoices l10n_pl_edi had already sent as validated, and **KSeF: reconcile downloaded inbound invoices** runs **Reconcile** on the received invoices in **Downloaded**.

> Even if the profile shows a start date, the module does not read your sales: the wave comes from the figures you enter. In **Relief window (<= threshold)** the profile shows 31-12-2026, which is when the relief ends. According to the Ministry of Finance, for those companies the obligation starts on 1-01-2027, and earlier if in any month they exceed PLN 10,000 gross.

6 The module options

This is what you can adjust in the module, where you adjust it and how it comes when installed.



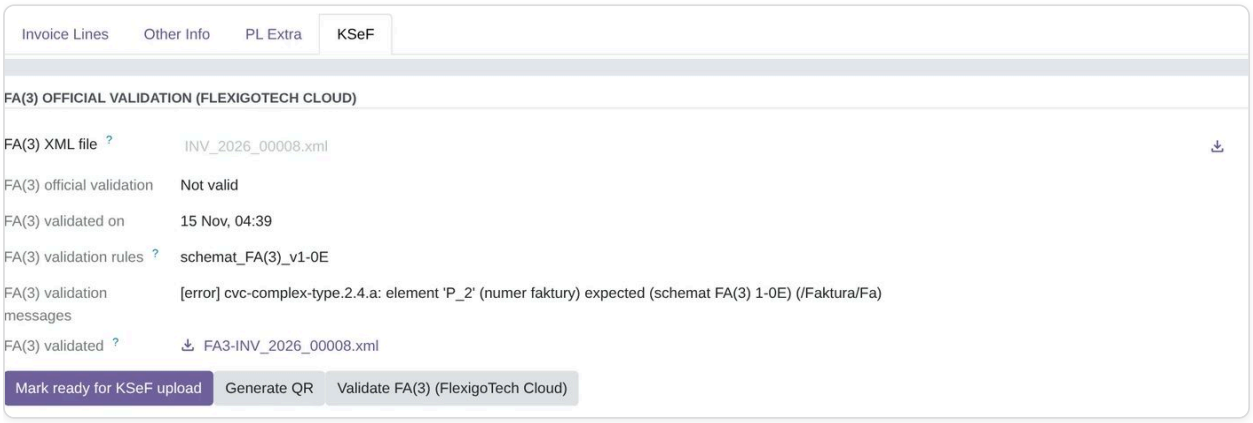
- **Real Odoo 20 screenshot.** The legal policy that comes with the module, with its dates.

OPTION	DEFAULT	WHAT IT DOES
Legal policy dates and thresholds (KSeF › Configuration › Legal Policy)	Relief threshold of PLN 10,000, large-company threshold of PLN 200,000,000, wave 1 on 1-02-2026, wave 2 on 1-04-2026 and end of relief on 31-12-2026	The profile uses them to calculate **Mandate Wave** and **Golive Date** with the figures you enter. The policy is one for the whole database.
Cloud consent (FA(3) validation in FlexigoTech Cloud)	No consent until it is accepted	A company's KSeF Administrator clicks **Accept and validate** before the first FA(3). Who accepted it and when is recorded, and it is withdrawn with **Withdraw**. It is given per company.
Groups KSeF Read-only, KSeF Accountant and KSeF Administrator	Without a group, the **KSeF** menu is not visible	They decide what each user sees and does. The **Configuration** menu belongs to the **KSeF Administrator**.

In the **Poland KSeF 2.0** block of Settings, leave **KSeF environment**, **KSeF endpoint URL** and **TLS verification** as they are: they do not connect anything. You cannot adjust the checks that **Mark ready for KSeF upload** performs or the language of the module's screens: its menus, fields and buttons appear in English in every language, Polish included: in that language the module only comes with the **Mark accepted by KSeF** button, its help text and 7 messages translated. Odoo's own screens appear in your language.

7 Validating the FA(3)

FlexigoTech Cloud's paid service checks each invoice's FA(3) against the official KSeF schema and returns the result in the invoice's **KSeF** tab.



- **Real Odoo 20 screenshot.** Tab of an invoice whose FA(3) fails validation, with its error messages.

Where each piece of data comes from

- With the **Validate FA(3) (FlexigoTech Cloud)** button, in the invoice's **KSeF** tab or as an action in the invoice list. It processes up to 50 invoices per click and about 60 seconds; if you repeat on the same selection, it carries on with the ones left.
- With the scheduled task **KSeF: validate again the FA(3) sent (FlexigoTech Cloud)**, which runs every hour and re-validates what l10n_pl_edi sent to KSeF.

What is validated

The FA(3) that KSeF received is validated, if l10n_pl_edi has already sent the invoice. If not, the file you uploaded in **FA(3) XML file** is validated. If there is neither, the one that l10n_pl_edi generates at that moment. With none of the three, the invoice stays as "Not validated" with a warning.

What the invoice stores

FA(3) official validation	The result: **Valid**, **Not valid**, **Not validated** or **Expired**.
FA(3) validated on	Date and time of the validation.
FA(3) validation rules	The set of rules and its version.
FA(3) validation messages	One line per error, in the format [level] rule (location).
FA(3) validated	The exact XML that was validated.

The signed report, **FA(3) validation report (signed)**, is only visible in developer mode.

Statuses

- **Valid**: the FA(3) passes the FlexigoTech Cloud check. It does not mean that KSeF has accepted it.
- **Not valid**: the check found errors; they are in the messages.

- **Not validated**: validation could not be performed.
- **Expired**: l10n_pl_edi sent the invoice with a different FA(3) and the earlier validation no longer applies.

First validation for a company

1. **Click Validate FA(3) (FlexigoTech Cloud)**
   If the company has not yet given its consent, the **Validate FA(3) files in FlexigoTech Cloud** screen appears.

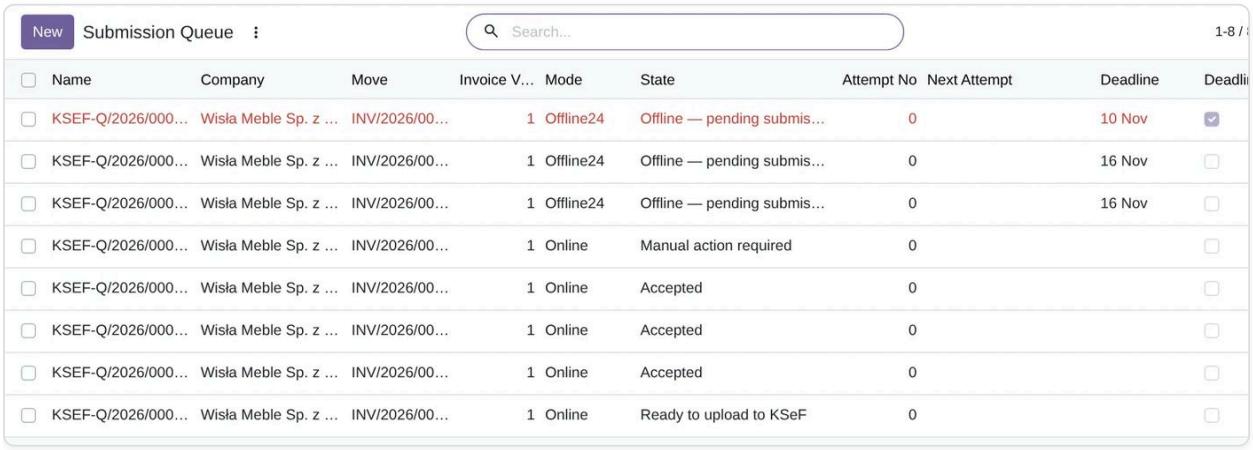
2. **A KSeF Administrator clicks Accept and validate**
   Until then, nothing is sent to FlexigoTech Cloud. Who accepted and when is recorded in Settings, in the **Poland KSeF 2.0** block, where consent can be withdrawn with **Withdraw**.

> Without a FlexigoTech Cloud trial or subscription, no FA(3) is validated: the invoice stays as "Not validated". Files larger than 10 MB are not accepted either. A failed attempt never deletes an earlier result; going back to draft or uploading another file does delete it.

USER MANUAL · KSEF 2.0

8 Mark ready for KSeF and the queue

Mark ready for KSeF upload checks the FA(3) data of a posted invoice and places it in the queue, ready to be uploaded with l10n_pl_edi.



- **Real Odoo 20 screenshot.** The queue, with one line per invoice, its mode, its status and its deadline.

The data comes from two places. The **Mark ready for KSeF upload** button on the **KSeF** tab creates the queue line. With l10n_pl_edi (Odoo 18-20), whatever KSeF replies passes automatically to the invoice and its line: sent, accepted with a number or rejected. In addition, the **KSeF: offline deadline scan** task runs every day and recalculates which lines are past their deadline.

What the button checks

It checks the Polish customer's NIP or, if the customer is foreign, their country. It checks that there is at least one product line and the currency code. For a self-billed invoice, it requires an active authorisation. For a credit note, it requires **Corrected invoice** and **Ksef Correction Reason**. If the customer has no NIP, it asks you to click **Generate QR** first; what that button writes is not the KSeF QR code. In offline24 mode, it checks that the

deadline has not passed. If everything is fine, the invoice enters **Submission Queue** as **Ready to upload to KSeF**. If anything is missing, it moves to **Manual action required** and does not enter the queue.

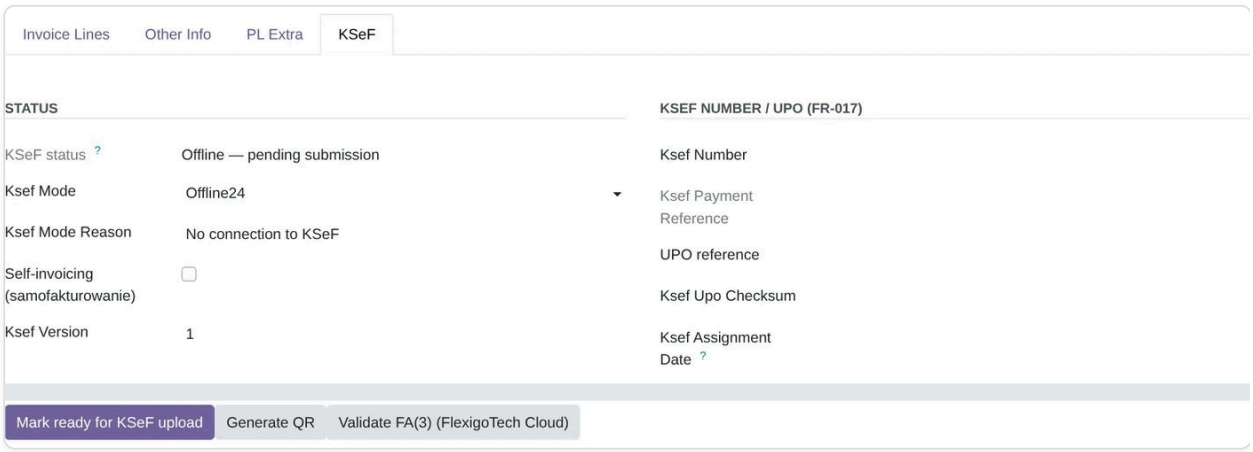
Mark ready for KSeF upload	**KSeF** tab of the invoice. Only visible when the invoice is posted. It checks the data and places the invoice in the queue. It does not send anything.
Validate FA(3) (FlexigoTech Cloud)	**KSeF** tab and action in the invoice list. It sends the FA(3) to FlexigoTech Cloud and returns the result in **FA(3) official validation**.
Mark accepted by KSeF	**KSeF** tab. It is for an invoice uploaded to KSeF outside Odoo and requires the **Ksef Number** to be entered already.

Statuses

The invoice status is **KSeF status**: **Not required**, **FA(3) pending**, **Ready to upload to KSeF**, **Submitted**, **Accepted**, **Rejected**, **Cancelled / superseded** and **Manual action required**. The queue line follows the status of its invoice. Nobody writes it by hand.

1. **Open the posted invoice**

   Go to the **KSeF** tab.



- **Real Odoo 20 screenshot.** The KSeF tab of an invoice, with its status and its buttons.

2. **Click Mark ready for KSeF upload**

   The module checks the FA(3) data.

3. **Open KSeF › Operations › Submission Queue**

   If everything was fine, the line appears as **Ready to upload to KSeF**.

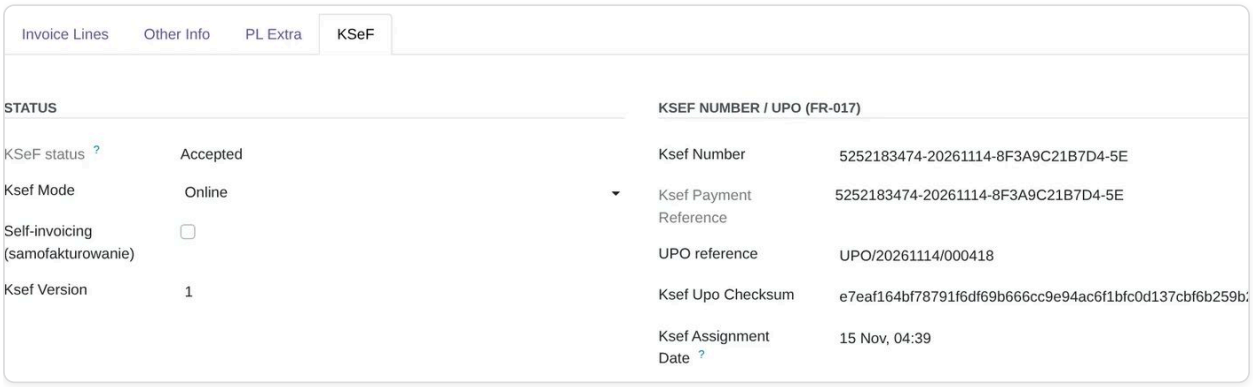
4. **Send the invoice with l10n_pl_edi**

   From **Send**, with the option "by KSeF (e-Faktura)".

> The module does not send anything to KSeF. If KSeF has already accepted the invoice, it cannot be marked again, set back to draft or cancelled: it is corrected with a credit note. It also cannot be marked if l10n_pl_edi has already sent it. The KSeF status is not written by hand either.

9 Accepted and rejected

Here you see what KSeF replied to an invoice, how to record by hand one you uploaded outside Odoo, and where to look up the meaning of each error code.



- **Real Odoo 20 screenshot.** The tab of an accepted invoice, with its KSeF number and its UPO reference.

The module does not send invoices to KSeF: sending is done by l10n_pl_edi from **Send**, with the option "by KSeF (e-Faktura)". What KSeF replies to l10n_pl_edi passes automatically to the **KSeF status** of the invoice and its queue line. If l10n_pl_edi checks the status of the invoice, the result arrives in the same way. There is no scheduled task or button in this module for that.

Statuses

Submitted	KSeF received the invoice that l10n_pl_edi sent.
Accepted	KSeF accepted it and issued its **Ksef Number**. If someone had entered a different number, the KSeF one replaces it and a note is left on the invoice.
Rejected	KSeF rejected it. The **Rejection (FR-018)** group on the tab stays empty.

Buttons on the KSeF tab

Mark accepted by KSeF	For an invoice uploaded to KSeF outside Odoo. Enter the **Ksef Number** first. It is hidden if the invoice is not posted, if it is not a customer invoice or credit note, if it is already accepted or if the number is missing. Only someone in the KSeF Accountant group or higher can use it.

1. **Enter the number**
   On the **KSeF** tab of the posted invoice, enter the **Ksef Number** that KSeF gave you.

2. **Click Mark accepted by KSeF**
   The invoice and its queue line move to **Accepted**. If **UPO reference** is empty, the module fills in "UPO/" followed by the KSeF number. The date and time of that moment are recorded and a line is left in the audit log.

Error codes

KSeF › Configuration › Error Codes holds the reference catalogue with the 69 codes of the KSeF 2.0 API. Each one comes with its official text in Polish, its category, whether it is retried and an explanation in English and

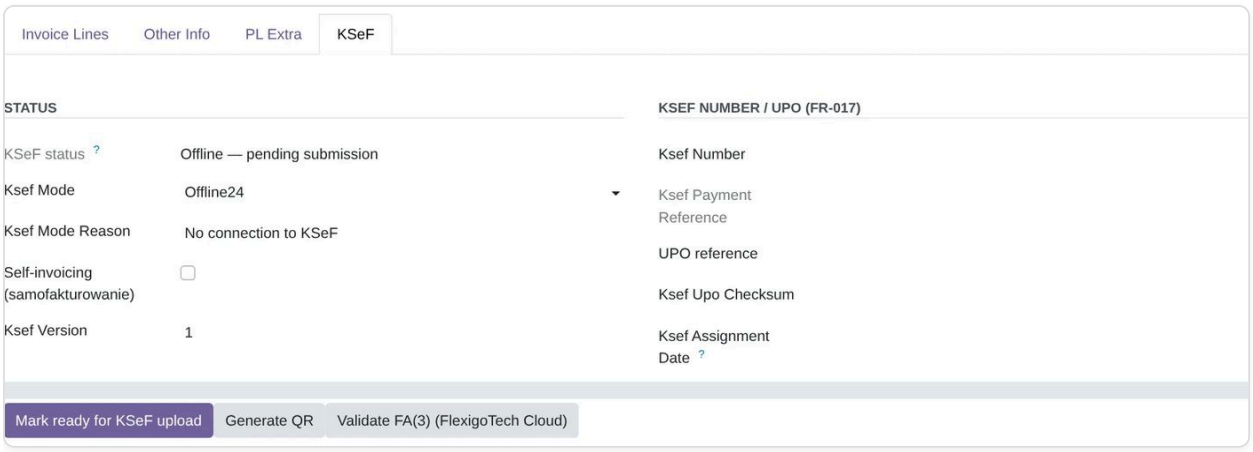
Polish.

> An accepted invoice does not go back to draft or get cancelled: it is corrected with a credit note. Its status and its KSeF number can only be changed by a KSeF Administrator. The **KSeF status** is not written by hand. You cannot click **Mark accepted by KSeF** if l10n_pl_edi has already sent the invoice: what KSeF replied takes precedence.

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10 Offline mode

With **Mark Offline / Emergency** you mark the invoices issued without KSeF with their mode and reason, and move them to the queue.



- **Real Odoo 20 screenshot.** The tab of an invoice marked in offline mode, with its mode and reason.

The module does not send anything to KSeF. Here you only record that the invoice was issued in an offline mode. In offline24, the module sets the deadline as the next Polish working day after the invoice date, according to the list of holidays that comes with the module.

Where each piece of data comes from

- The mode and the reason are entered by you: with the **Mark Offline / Emergency** action or by hand on the **KSeF** tab, in **Ksef Mode** and **Ksef Mode Reason**.
- The deadline is calculated by the module when the invoice is placed in the queue.
- The overdue flag is recalculated every day by the **KSeF: offline deadline scan** task. It does not notify anyone: the flag is visible when you open the queue.

The wizard

It opens with the **Mark Offline / Emergency** action, from the actions menu of the invoice list (with the invoices selected) or from an invoice form.

Mode	**Offline24** (the default), **Offline (unavailability)** or **Emergency (awaria)**. It is mandatory.
Reason	The reason, in free text.

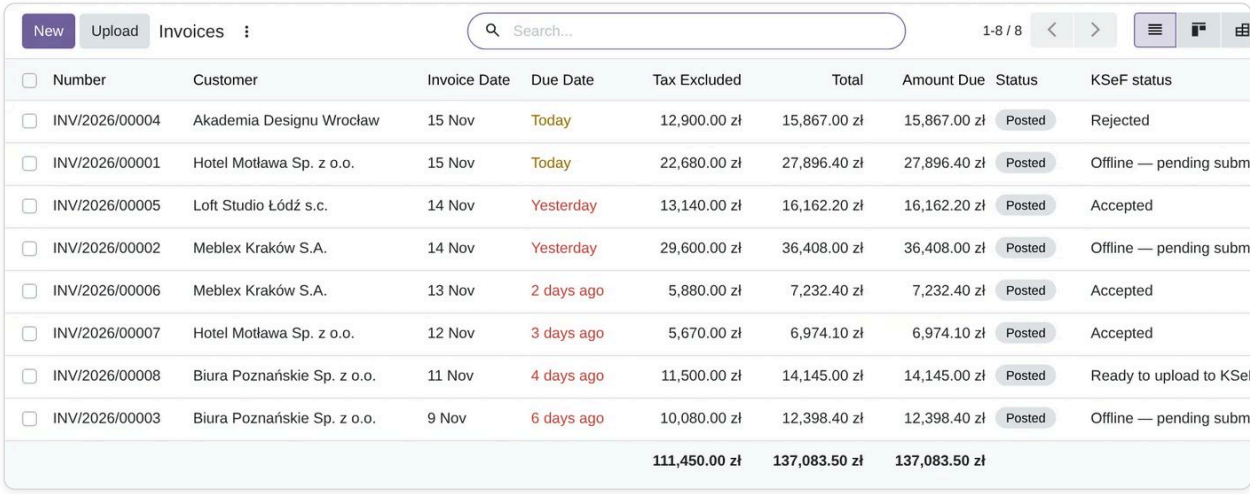
Apply	It writes the mode and reason on the selected invoices and marks them with **Mark ready for KSeF upload**.
Cancel	It closes the wizard without changing anything.

Statuses in the queue

When applied, each invoice enters **Submission Queue** with its deadline and the offline status pending submission. Lines whose deadline has passed and that are still pending are shown in red.

1 Select the invoices

Select the posted invoices in the invoice list.



Number	Customer	Invoice Date	Due Date	Tax Excluded	Total	Amount Due	Status	KSeF status
INV/2026/00004	Akademia Designu Wrocław	15 Nov	Today	12,900.00 zł	15,867.00 zł	15,867.00 zł	Posted	Rejected
INV/2026/00001	Hotel Motława Sp. z o.o.	15 Nov	Today	22,680.00 zł	27,896.40 zł	27,896.40 zł	Posted	Offline — pending subm
INV/2026/00005	Loft Studio Łódź s.c.	14 Nov	Yesterday	13,140.00 zł	16,162.20 zł	16,162.20 zł	Posted	Accepted
INV/2026/00002	Meblex Kraków S.A.	14 Nov	Yesterday	29,600.00 zł	36,408.00 zł	36,408.00 zł	Posted	Offline — pending subm
INV/2026/00006	Meblex Kraków S.A.	13 Nov	2 days ago	5,880.00 zł	7,232.40 zł	7,232.40 zł	Posted	Accepted
INV/2026/00007	Hotel Motława Sp. z o.o.	12 Nov	3 days ago	5,670.00 zł	6,974.10 zł	6,974.10 zł	Posted	Accepted
INV/2026/00008	Biura Poznańskie Sp. z o.o.	11 Nov	4 days ago	11,500.00 zł	14,145.00 zł	14,145.00 zł	Posted	Ready to upload to KSe
INV/2026/00003	Biura Poznańskie Sp. z o.o.	9 Nov	6 days ago	10,080.00 zł	12,398.40 zł	12,398.40 zł	Posted	Offline — pending subm
				111,450.00 zł	**137,083.50 zł**	**137,083.50 zł**		

- **Real Odoo 20 screenshot.** The customer invoice list.

2 Open the action

In the actions menu, click **Mark Offline / Emergency**.

3 Fill in the wizard

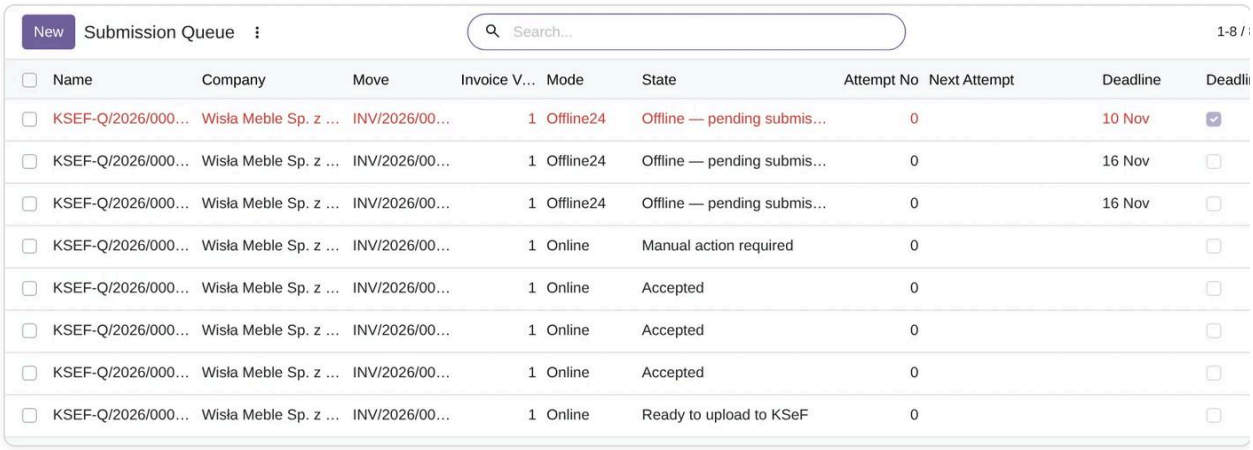
Choose the **Mode** and type the **Reason**.

4 Press Apply

The invoices move into the queue with their deadline.

5 Open the queue

Go to **KSeF › Operations › Submission Queue** to see the deadline of each line.



- **Real Odoo 20 screenshot.** The queue with the flagged lines and their deadline.

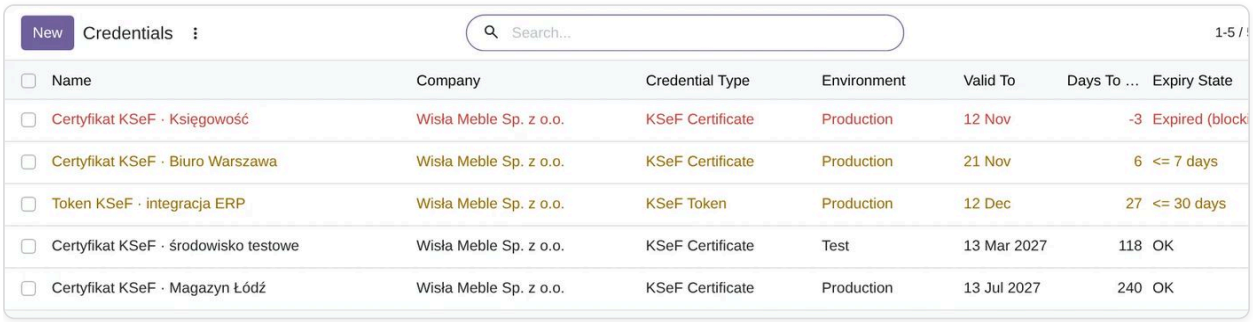
> Under **Offline (unavailability)** and **Emergency (awaria)**, don't rely on the deadline shown in the queue: it is not the legal one.

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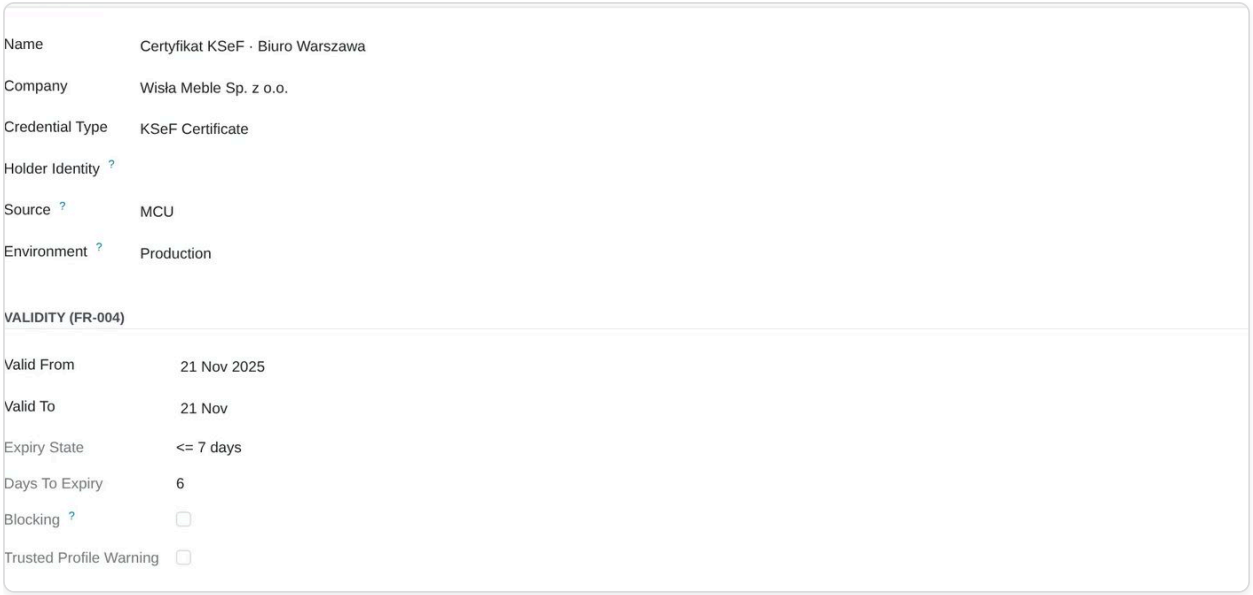
11 Credentials and authorisations

Here you keep track of your KSeF credentials, with warnings before they expire, and the register of who is authorised to act on your behalf.

Credentials are in **KSeF › Configuration › Credentials** and authorisations in **KSeF › Configuration › Authorizations**. Both are in the **Configuration** menu, which only the KSeF Administrator group can see. None of the data comes from KSeF: you enter it yourself. The module does not log in to KSeF with the credentials: it only monitors their end date.



- **Real Odoo 20 screenshot.** The credentials list with their expiry status.



- **Real Odoo 20 screenshot.** A credential with its expiry warning.



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

Where each piece of data comes from

The scheduled action **KSeF: certificate expiry alerts** runs every day. When a credential reaches 30, 14, 7 or 1 day before its end, and when it expires, it creates a pending activity with a due date for a KSeF Administrator of the company and writes the same note in the credential's history. It alerts once per threshold, not every day.

The **KSeF: authorization alerts** task also runs every day, but it only recalculates the status of the authorisations. It does not notify anyone or create pending activities.

The fields of the record

Credential Type	**KSeF Certificate**, **KSeF Token**, **Qualified signature**, **Qualified seal** or **Trusted Profile**.
Environment	**Test** or **Production**.
Valid To	End date. It is mandatory and the status is calculated from it.
Revoked	On an authorisation, you tick this yourself when the permission is withdrawn in KSeF.
Scope	On an authorisation: **Issue**, **View**, **Self-invoicing**, **Token management** or **Accounting office**.

Statuses

The status of a credential is called **Expiry State**: **OK** while more than 30 days remain before its end; after that, one status for each threshold (30, 14, 7 and 1 day); and **Expired (blocking)** from the day after its end, although it does not block any invoice. In the list, credentials expiring within 30 days or fewer are shown in orange and expired ones in red.

The status of an authorisation is called **State** and takes one of these values: **Active**, **Expiring**, **Revoked** or **Expired**.

How to renew a credential

1. **Open the credential**
   Go to **KSeF › Configuration › Credentials** and open the one that is expiring.
2. **Change Valid To**
   Enter the new end date and save.
3. **Check the status**
   The warnings start again from the new date.

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12 Migration validator

The validator checks a company's contacts and invoices and gives you a readiness percentage and a list of what fails.



- **Real Odoo 20 screenshot.** The validator wizard with the company and the scope.

Where the data comes from

There is no scheduled task. You launch each run yourself from **KSeF › Migration › Run Validator**: choose the company and the scope, then click **Run validation**. The **Dry-run (test environment)** checkbox does not change what is checked. Each run is recorded in **KSeF › Migration › Validation Runs**.

The wizard

Company	The company being checked. The active company is pre-filled.
Scope	**Master data**, **Invoices** or **Both**. Pre-filled with **Both**.
Run validation	Starts the pass.
Cancel	Closes the wizard.

The record of each pass

Run	Repeats the pass.
Export checklist	Downloads a CSV with each record, its status, the error code and the reason, failures first.
Open	On each line of the result, takes you to the contact or the invoice.

What it checks and what you see

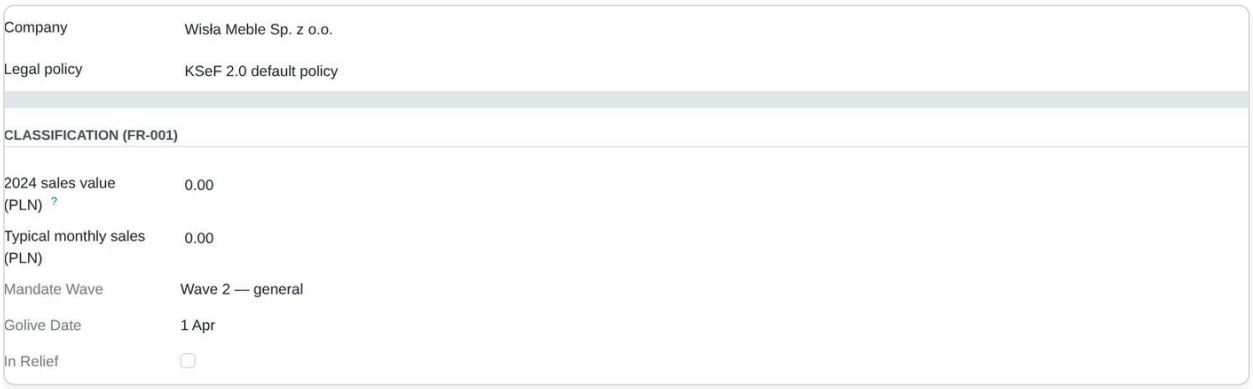
Under **Master data** it checks up to 2,000 main contacts with sales or purchases. Under **Invoices** it checks up to 2,000 customer invoices and credit notes of the company, in any state (drafts and cancelled ones included). Each line passes or fails. The result shows the passes, the failures and the **Readiness Score**, which is the percentage of lines that pass.

> The validator does not connect to KSeF and does not send anything.

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13 Profile, dashboard and policy

Each company's profile sets its wave and its mandate date, the dashboard shows its counts, and the legal policy stores the dates and thresholds the profile uses.



- **Real Odoo 20 screenshot.** The compliance profile of a company, with its sales, its wave and its date.

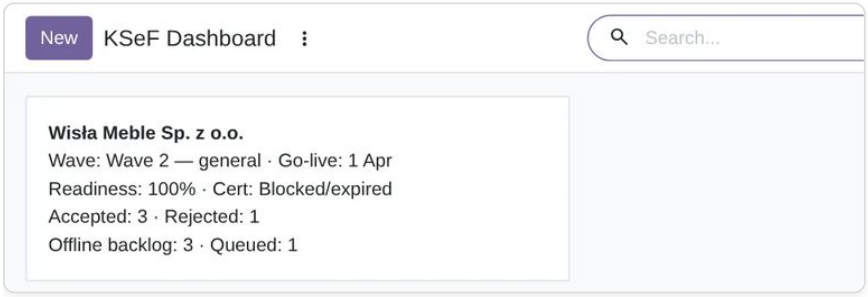
Where each piece of data comes from

- You enter the 2024 sales and the typical monthly sales yourself, in **Compliance Profile**. The module does not read your sales.
- **Mandate Wave**, **Golive Date** and **In Relief** are calculated automatically from those figures and from the legal policy.
- **Readiness Score** comes from the latest validator pass. Each pass is kept in **Validation Runs** and copies its score to the profile and the dashboard.
- **Cert State** and the invoice and queue counts are calculated on the dashboard from your credentials, your invoices and your queue. They are recalculated each time the dashboard is opened.

The profile

Company	The company the profile belongs to. There is one per company.
Legal policy	The legal policy used for the calculations.
2024 sales value (PLN)	2024 sales including VAT. They decide the wave.
Typical monthly sales (PLN)	Typical sales in one month. They decide whether the company is under relief.

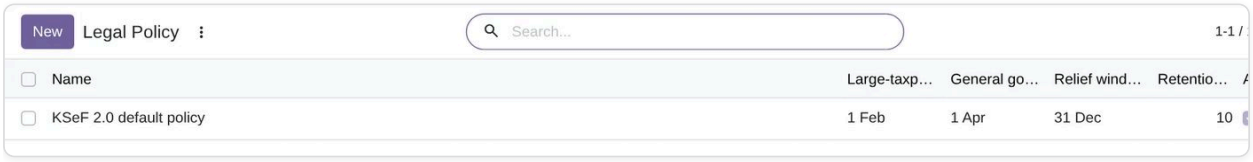
The dashboard



- **Real Odoo 20 screenshot.** The dashboard with one card per company and its counts.

The dashboard, at **KSeF › Dashboard**, shows one card per company with its wave, its date and its **Readiness Score** as a percentage. It also shows the status of the credentials (**OK**, **Expiring**, **Blocked/expired** or **No credential**) and the counts of accepted, rejected and offline-pending invoices, plus the queue lines that are ready or sent.

The legal policy



- **Real Odoo 20 screenshot.** The legal policy, with its dates.

Legal Policy, at **KSeF › Configuration › Legal Policy**, holds the dates and thresholds that the profile uses. There can only be one active policy for the whole database. Editing it requires the KSeF Administrator group.

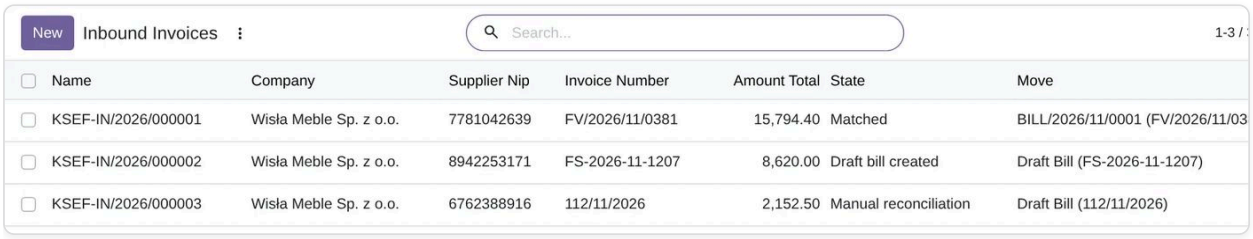
Steps to set up a profile

1. **Open the profile**
   Go to **KSeF › Configuration › Compliance Profile** and choose the company.
2. **Enter the figures**
   Fill in **2024 sales value (PLN)** and **Typical monthly sales (PLN)**. **Mandate Wave** and **Golive Date** are recalculated.

> The profile classifies using the figures you enter and does not read your sales. There is no need to press **Enable production**: it connects nothing to KSeF.

14 Received, audit and export

Here you record supplier invoices, reconcile them with Odoo, check the audit log and export the CSV.



- **Real Odoo 20 screenshot.** The list of received invoices recorded by hand.

Where the data comes from

The module does not download any invoice from KSeF. Inbound invoices are recorded by hand or imported, with the supplier's NIP, the number, the amount, the KSeF number and the UPO reference, and they enter as **Downloaded**. The list is at **KSeF › Operations › Inbound Invoices**. The **KSeF: reconcile downloaded inbound invoices** task runs every hour and applies **Reconcile** to those still in **Downloaded**.

Record buttons

Reconcile	Searches the company for a supplier invoice whose reference is the invoice number written down. It only looks at the reference: it does not check the NIP or the amount. If it finds one, it links it and copies the KSeF number and the UPO. If not, it creates a draft supplier bill with no lines. It leaves an entry in the audit log.
Export CSV	Download the CSV from **KSeF › Operations › Compliance Export**.

Statuses

STATUS	WHAT IT MEANS
Downloaded	Recorded, not yet matched.
Matched	A supplier invoice with that reference was found.
Draft bill created	There was no invoice; a draft was created and the supplier was found by NIP.
Manual reconciliation	The draft was created, but the supplier could not be found: it is left to match by hand.

Audit log

KSeF › Configuration › Audit Log stores one line for each **Mark accepted by KSeF**, validator run, **Reconcile**, export and line deletion. The lines cannot be edited.

Steps to match an invoice

1. **Enter the invoice**
   In **Inbound Invoices**, enter the NIP, number, amount, KSeF number and UPO.

2 **Click Reconcile**

Or wait for the hourly task.

3 **Check the status**

See whether it ended up as **Matched**, **Draft bill created** or **Manual reconciliation**.

> Audit lines are never edited. Only a KSeF Administrator can delete those older than **Retention (years)** (10), and the deletion leaves its own line. Anyone who is not a KSeF Administrator sees the NIP masked in the export.

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15 What happens automatically

The module's scheduled tasks are active as soon as it is installed.

TASK	FREQUENCY	WHAT IT DOES
KSeF: offline deadline scan	Daily	Only recalculates the overdue deadline flag in the queue.
KSeF: certificate expiry alerts	Daily	Creates a pending activity and a chatter note on each credential that is 30, 14, 7 or 1 day from its end, and on each one that has expired.
KSeF: authorization alerts	Daily	Only recalculates the status of the authorisations.
KSeF: reconcile downloaded inbound invoices	Hourly	Runs **Reconcile** on received invoices still in **Downloaded**. It does not download anything from KSeF.
KSeF: validate again the FA(3) sent (FlexigoTech Cloud)	Hourly	Validates again the FA(3) that l10n_pl_edi sent to KSeF when the invoice's validation moved to **Expired**, and those left pending.

Frequencies are changed in **Settings › Technical › Automation › Scheduled Actions**. To see that menu you need developer mode.

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16 If something fails

These are the cases you will see most often and where to look for each one.

The invoice is left in Manual action required	Some data required by the FA(3) is missing. The reasons do not appear in the **KSeF** tab while the invoice is not **Rejected**: run the migration validator (KSeF › Migration › Run Validator), which lists them invoice by invoice. Correct the data and click **Mark ready for KSeF upload** again.
The validation shows "Not validated"	There is no FlexigoTech Cloud service (no trial or subscription, or the database is not connected), or there was no XML to validate. The invoice's notice gives the reason. Without the service, no FA(3) is validated.
The consent screen will not let you accept	Only a KSeF Administrator of that company can click **Accept and validate**. Until they do, nothing is sent to the cloud.

The accepted invoice does not go back to draft	An invoice that KSeF has accepted cannot be reset to draft or cancelled. It is corrected by issuing a corrective invoice.
The validation moves to Expired after sending	l10n_pl_edi regenerates the FA(3) when sending, and the validated one no longer matches. The task **KSeF: validate again the FA(3) sent (FlexigoTech Cloud)** validates the sent one as soon as it can and reviews what is pending every hour.

FlexigoTech Cloud notices: if validation is halted on the database, the invoice is left "Not validated" and the notice explains why (no subscription, or database not connected in Settings). FlexigoTech Cloud does not accept files larger than 10 MB. Each press of **Validate FA(3) (FlexigoTech Cloud)** validates up to 50 invoices and takes about 60 seconds; if invoices remain, press it again and it continues with those left. A failed attempt never deletes an earlier result.

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17 Support

Write to us to install it, configure it or with any question. On the Standard plan we reply within 1 working day; on the Pro plan, within 4 working hours, and if needed we can go through 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/ksef-poland-odoo.html

On Odoo Apps

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

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