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efaktura — Portal User Manual

Audience: people who use the efaktura web portal to send and receive electronic invoices for their company.

The efaktura portal lets you:

- issue invoices and credit notes and send them to your customers over the Peppol network,
- upload invoices issued in your own invoicing system (XML or ZIP) and send them in one go,
- read the invoices your company receives and the ones it has sent, as PDF or XML, and follow their delivery,
- export documents in bulk for your accounting or archive,
- see an overview of your invoicing and a VAT summary,
- manage who in your company has access, and create API integrations for your other systems.

Every invoice you send is also reported to the Slovak tax authority automatically; you do not need to do anything extra.

The portal is available in **Slovak** (default) and **English**. Switch the language with the flag button in the top bar; the portal remembers your choice in this browser. This manual uses the English labels.

1. Your account

1.1 Create an account

1. Open the portal and choose **Sign up**.
2. Fill in **First name**, **Last name**, **Email** and **Password** (at least 6 characters), then choose **Sign up**.
3. You see **Check your email**. Open the email with the subject *Email confirmation* and choose **Confirm email**. The link is valid for **24 hours**.
4. The portal shows **Email verified**. Choose **Sign in**.

If you see *An account with this email address already exists*, sign in instead, or use **Forgot password** (§1.3).

1.2 Sign in

1. On the portal home page choose **Sign in**.
2. Enter your email and password on the sign-in page (*Prihlásenie*) and choose **Prihlásiť sa**. The sign-in pages are in Slovak only.
3. **Verification code.** Every sign-in requires a 6-digit code that we email to you (subject *Your e-faktúra verification code*). Enter it under **Verification code** and choose **Verify**. - The code is valid for **10 minutes**. - If it does not arrive, choose **Resend code**. You can

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request a new code once every 60 seconds. - After 5 wrong codes, wait 15 minutes before trying again.

After you sign in you land in **Inbox**. If you are not yet a member of any company, a banner **Start by adding an authorization** leads you to activation; continue with §2.

1.3 Forgot password

1. On the sign-in page choose **Zabudli ste heslo?** (*Forgot password?*).
2. Enter your email and choose **Poslať odkaz** (*Send link*).
3. Open the email *Obnovenie hesla do e-faktúra portálu* and choose **Nastaviť nové heslo** (*Set a new password*). The link is valid for **30 minutes** and works once. Requesting another link cancels the earlier one.
4. Enter the new password twice (at least 6 characters) and choose **Zmeniť heslo** (*Change password*).

For your security you are signed out everywhere, and you receive an email confirming the change. If you did not change your password yourself, use the link in that email to set a new one.

If you never confirmed your email, step 2 sends the confirmation email again instead.

1.4 Your profile and signing out

Open the menu with your name in the top right corner:

- **Settings** opens **Profile**, which shows your name, email and roles. The profile is read-only.
- **Log out** signs you out of the portal.

Changing your password while signed in is not available in the portal; use **Forgot password** (§1.3).

2. Activating your company

Before you can send or receive invoices, your company must be activated in efaktura. Activation connects the company to the Peppol network. The person who activates the company becomes its **owner** in the portal.

You need the **verification token** that was sent to your company by email when it authorized efaktura as its provider.

1. Choose **Add authorization** on the banner, or open **Settings → Authorizations** and choose **Add authorization**.
2. Fill in the form:

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Field	What to enter
Verification token	the token from the email (required)
Registration number (IČO)	optional; with 8 digits you can choose **Look up in the register** to fill in the company details from the Slovak business registers, including the VAT ID. Check the filled-in data.
Tax ID (DIČ)	required; exactly 10 digits, without the SK prefix
VAT ID	optional; leave it empty if the company is not a VAT payer
Company legal name	required
Company email	required
Registered address	country (choose from the list, default Slovakia), street, building number (for Slovak addresses at least one of the conscription and orientation numbers), municipality and postal code. For Slovakia choose the municipality from the list as you type.
Business register entry	optional; for example the court and file number. It is printed on your invoices.

3. Choose the **Scope of service**:

Scope	When to choose it
Sending and receiving (default)	efaktura sends your invoices and receives the ones addressed to you. The company is registered in the Peppol network.
Sending only	you already receive invoices through another provider. Nothing is registered, so you can send right after activation.
Receiving only	you issue invoices elsewhere and only want to receive them here. The company is registered in the Peppol network.

If the company already receives invoices through another provider and you choose an option with receiving, the registration fails, because the company's tax ID is already registered by that provider.

4. Choose **View Terms & Conditions**, read them, and tick **I have read and agree to the Terms & Conditions**.
5. Choose **Submit**.

The portal shows **Authorization submitted — registration in progress** and refreshes the state by itself. Registration usually takes a few minutes; until it is done, a banner on the main screens says so. You can follow it in **Settings → Authorizations**:

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State	Meaning
Awaiting activation	the company has authorized efaktura; submit the activation form
Registration pending	the company is being registered in the Peppol network
Retry pending	a registration step failed and is being retried automatically
Registered	done; the company sends and receives invoices
Registered (receiving only)	done; the company receives invoices here and does not issue them here
Active (sending only)	done; the company sends invoices here and receives them through another provider
Registration failed	registration could not be completed; **Settings → Company** says what to do (see §8.2), otherwise contact support

If the form says the Terms & Conditions have changed, open them again, tick the box and submit again.

3. Finding your way around

- **Top bar:** the efaktura logo (back to Inbox), the **company switcher**, the language flag and your user menu.
- **Company switcher:** if you work for several companies, choose which one you are working with. Every screen shows data for the selected company only. The portal remembers your choice.
- **Left menu: New invoice**, **Dashboard**, **Inbox**, **Outbox**, **Exports** and **Uploads**. On a phone the menu is a row of tabs.
- **Settings:** in your user menu. Contains **Profile**, **Company**, **Number sequences**, **Price list**, **Bank accounts**, **Authorizations**, **Users** and **Integrations**. The company sections are available once you are a member of a company. **Back to the app** returns to the documents.

New invoice is disabled while the selected company cannot issue invoices; hover over it to see why: the authorization is not approved yet, the company is still being registered, or its scope of service is **Receiving only**.

4. Received and sent documents

Inbox lists documents your company received; **Outbox** lists documents it sent. Newest documents are first, 20 per page.

Columns: **Date**, **Number**, **Sender** (Inbox) or **Recipient** (Outbox), **Tax point**, **Type**, **Amount** and **Status**.

- **Sender** / **Recipient** shows the other company's name with its IČO and DIČ (or VAT ID).
- A paperclip next to the number means the document has attachments.

- Document types: **Invoice**, **Credit note**, **Self-billed invoice** and **Self-billed credit note**. Technical messages (for example delivery confirmations) appear with an **XML** badge.

4.1 Document status

Hover over a status to see what it means.

Outbox:

Status	Meaning
Sending	our access point took the invoice over and is delivering it to the customer and to the Financial Administration
Delivered, awaiting confirmation	delivered to both; waiting for them to confirm, usually within minutes
Delivered and confirmed	the customer accepted the invoice and the Financial Administration confirmed the tax data; nothing left to do
Rejected by the customer	the customer's access point rejected the invoice; correct it and send it again
Delivered, not confirmed by the tax office	the customer accepted the invoice, but the Financial Administration did not confirm the tax data
Not confirmed	no confirmation within 25 minutes; check the delivery with the customer
Undeliverable	the customer's access point is unreachable, or the customer is not registered in the Peppol network

Inbox:

Status	Meaning
Received	the document arrived from the Peppol network
Collected	your own system collected the document through an API integration (§8.8)

4.2 Filtering

At the top of the list you can filter by:

- **Document number**: matches from the beginning of the number,
- a date range, by **Received**, **Issued** or **Tax point** date,
- **Other party**: any part of the supplier's name (Inbox) or the customer's name (Outbox).

Choose **Filters** for more:

- supplier or customer **IČO**, **DIČ** or **IČ DPH** (exact value),
- **Document type**, and **Corrected invoice number** for credit notes,
- **VAT category** (for example *S – standard rate*, *AE – reverse charge*).

Active filters show as chips you can remove one by one; **Clear filters** removes all. The filter is part of the page address, so you can bookmark it.

4.3 Opening a document

Click a row to open the document next to the list. You can:

- read the PDF directly in the portal,
- **Open PDF** in a new browser tab,
- **Download XML (ZIP)**: all XML files of the document in one ZIP,
- open or download its **Attachments**, listed under the preview; an attachment given as a web link opens in a new tab.

Some technical document types have no PDF; download the XML instead.

5. Issuing an invoice

Choose **New invoice** in the left menu. Use the arrow next to it to pick the method:

- **Quick invoice**: a 5-step wizard for an ordinary domestic invoice.
- **Full form**: every field, for credit notes, foreign currency, discounts, attachments and other cases.
- **Upload finished invoices**: XML or ZIP files from your own invoicing system, sent right away (§5.4).

Before your first invoice, check your **Company** details (§8.2) and set up **Number sequences** (§8.3). It is also worth filling in the **Price list** (§8.4) and the **Bank accounts** (§8.5).

5.1 Quick invoice

1. **Number and date.** The wizard offers the next number from your default number sequence. The issue date is always today. Choose **Yes, continue**, or **Change** to edit the number and the **Tax point date (date of supply)**. Fill in the tax point date when you invoice a supply from an earlier day, for example October's work invoiced in November; if you leave it empty it is the issue date. The wizard reminds you of the deadline to issue the invoice, 15 days after the supply, and warns you if it has passed (you can still issue it).
2. **Customer.** Choose one of: - **Existing customer**: search your address book and recent invoices by name, IČO, VAT ID or DIČ. - **New customer**: enter the IČO; the name, DIČ and address are filled in from the business register. A new customer is saved to your address book automatically.

Check the name, IČO, DIČ, IČ DPH and address. You can add an order number. The portal checks in the Peppol network whether the customer can receive electronic invoices (see *Customer outside Peppol* below). 3. **Items.** Add items from your **Price list** or choose **Add your own item**. Set quantity, unit, unit price and VAT rate. **Save to price list** keeps a new item for next time. For an item without VAT, choose the reason. 4. **Payment.** Choose **Bank transfer** or **Cash**. For a bank transfer, pick one of the **Company accounts** with one click (the primary account is preselected) or type another IBAN; **Save to the company accounts** keeps

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it. Check the payment reference (it defaults to the digits of the invoice number). Choose the due date: 7, 14 or 30 days. You can add a **Note on the invoice** for the customer. For card payment, direct debit and other methods, use **Open the full form**. 5. **Summary.** Review the invoice. Your company details can be adjusted for this invoice only. If something is missing, follow **Fix in step …**. Then choose **Send the invoice**.

What happens next:

- **Sending the invoice**: the invoice is being handed over to the Peppol network.
- **Invoice sent**: it will appear in **Outbox**. Choose **Issue another invoice** or **Done**.
- **The access point refused the invoice**: the invoice failed a check. It keeps its number; choose **Fix the invoice**, correct it and send it again.

Customer outside Peppol. If the customer is not registered in the Peppol network or does not accept invoices there, the wizard warns you in step 2. You can still send the invoice: the tax data still goes to the Financial Administration, but the invoice does not reach the customer through Peppol, so deliver it to them another way. The final screen reminds you of this. If the Peppol directory is not answering, the customer cannot be checked; you can still send, and the invoice is delivered only if the customer is registered.

If you close the wizard before sending, the invoice is not saved.

5.2 Full form

The full form (**Invoice / credit note entry**) contains every part of a Peppol invoice: header, seller, buyer, tax representative, payee, delivery, payment instructions, document-level discounts and charges, invoice lines with line detail, VAT breakdown, totals, references, attachments and notes.

- **Prefill from the last invoice** copies the data of your previous invoice.
- For a **credit note**, enter the number of the invoice it corrects.
- **Attachments**: PDF, PNG, JPEG, CSV, XLSX or ODS, at most about 70 MB in total.

1. Choose **Check document**. Problems are shown at the affected fields. When everything is fine, you see **Document passed the check**.
2. Choose **Send document**. The result is **Document sent** or **Document refused**; a refused document can be corrected and sent again.

5.3 After sending

A sent invoice is delivered to the customer and reported to the tax authority in the background. Follow it in **Outbox**; the **Status** column shows its current state (§4.1).

5.4 Uploading finished invoices

If you issue invoices in your own invoicing or accounting system, you can upload them and efaktura sends them. Any member of the company can upload.

Uploading sends the invoices. Every document that passes the checks is sent to the customer and the tax authority right away, with no further confirmation.

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1. Choose **Upload finished invoices** under the arrow next to **New invoice**, or **Uploads → Upload invoices**.
2. Drop the files into **Files to upload**, or click to choose them. You can mix individual XML files and ZIP archives.
3. Choose **Upload and send**. Keep the page open while large files upload.

What can be uploaded:

- a UBL invoice or credit note per Peppol BIS Billing 3.0 or Self-Billing 3.0, UTF-8 encoded;
- issued by the selected company: as the seller, or as the buyer on a self-billed document;
- the invoice XML itself, not a Peppol envelope (SBDH);
- one document at most 10 MB; one upload at most 100 MB and 1000 documents; other files in a ZIP are skipped, and a ZIP inside a ZIP is not opened.

Uploads lists your uploads with the time, files, number of documents and the outcome. A company's uploads are processed one after another, and the list refreshes itself while an upload is being processed. Open an upload to see every document with its status and, for a document that was not sent, the reason (for example the rule it failed). **Not sent** shows only the problem documents; **Show in Outbox** opens a sent one.

Document status	Meaning
Waiting to be sent, **Retrying**	still in progress
Sent	accepted by the access point; follow its delivery in **Outbox**
Invalid	the file failed a check; the reason says which
Duplicate	a document with this number was already sent, or appears earlier in the same upload
Rejected	the access point refused the document
Could not be sent	sending failed, for example the access point was unavailable; upload it again later
Skipped	the file in the ZIP is not an XML document

A document that was invalid, rejected or not sent can simply be uploaded again once fixed. Only documents the access point accepted count as duplicates, even if their delivery failed later, so nothing is sent twice. Uploaded files are deleted once processed.

6. Exporting documents

An export is a ZIP archive with the XML files of the selected documents and a `manifest.csv` index. It does not contain PDFs.

Export selected documents

1. In **Inbox** or **Outbox**, tick the documents (the header checkbox selects the whole page; the selection is kept when you change page).

2. Choose **Export selection**. At most **1000 documents** per export.

Export a period

1. Choose **Export period** above the list, or **Exports → New export**.
2. Enter **From** and **To**. Both days are included; the period can be up to **12 months**.
3. Choose the date to filter by: **Processing date** (default) or **Invoice issue date**. Documents with no recorded issue date are not included when you export by issue date.
4. Choose the mailboxes: **Inbox**, **Outbox** or both.
5. Choose **Export**.

Small exports are ready immediately. Larger ones are prepared in the background; follow them in **Exports**:

Status	Meaning
Preparing	the archive is being built; a progress bar shows how far it is
Ready	choose **Download ZIP**; a very large export is split into parts (**Download all** or **Part 1**, **Part 2**…)
Failed	the export could not be built; try **Export again**
Expired	files are kept for **7 days**; choose **Export again**

Only one export per company can run at a time. You are not notified when an export is ready; check **Exports**.

7. Dashboard

Dashboard gives an overview of the selected company for a chosen **Year**:

- **Overview**: number and amount of issued and received invoices, output and input VAT and the net VAT payable, with monthly charts. Each VAT figure says what it holds: output VAT comes from invoices issued here; input VAT from invoices received in the period, by date of receipt; net VAT is output minus input VAT and is an indication, not a tax return. If the VAT of a received document is not known, no input VAT sum is shown.
- **Invoice status**: how many of your issued invoices are created, validated, sent and accepted or rejected.
- **VAT report**: VAT totals by category and rate for a period you choose. **Export CSV** downloads the table.
- **Data quality**: how many of your invoices failed checks, and the most frequently failed rules.

8. Settings

8.1 Profile

Shows your name, email and roles. Read-only.

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8.2 Company

Company details are what every new invoice states as you, the seller: legal name, company email, IČO, DIČ, VAT ID, registered address and business register entry. Every member can see them; only an **owner** can choose **Edit** and **Save changes**.

- A change applies to new invoices only; invoices already issued are not changed.
- The DIČ cannot be changed. A company with another DIČ is a new authorization (§2).
- If something was not entered at activation, for example the postal code or the business register entry, the screen asks you to fill it in. **Look up in the register** helps.

Scope of service shows whether the company sends and receives, sends only or receives only (see §2) and the state of its registration. An owner can choose **Change scope** and **Save scope**. Before saving, the portal says what the change does:

- switching to an option with receiving registers the company in the Peppol network. Until that completes, usually within a minute, nothing is sent or received. If another provider already registered the company's tax ID, the registration fails;
- switching to **Sending only** removes the company from the Peppol network, so invoices stop arriving here; arrange receiving with another provider;
- switching to **Receiving only** turns off issuing invoices here.

If the registration failed, the section says what to do: if the company receives through another provider, switch to **Sending only**; otherwise save the scope again to retry.

8.3 Number sequences

Number sequences generate your invoice numbers.

- **Add sequence**: enter a **Name**, a **Pattern** and the **Next number** (1 or more).
- The pattern is text with an optional year (`{YYYY}` or `{YY}`) and exactly one number block (`{NNNN}`). Example: `FA-{YYYY}-{NNNN}` gives FA-2026-0001.
- **Make default** sets the sequence the wizard uses. The default sequence cannot be deleted.

8.4 Price list

Your products and services, ready to add to invoices. **Add item** with a **Name**, **Unit price** (without VAT), **Unit** (for example piece, hour, day, kilogram) and **VAT rate**. Use the search box to find items. If your company is not a VAT payer, items are without VAT.

8.5 Bank accounts

The accounts your customers pay to, each with an **IBAN** (required), **Account name** and **BIC / SWIFT** (optional). A company can keep up to 10 accounts.

- The **Primary** account is proposed on every new invoice; on the invoice you can pick another one with one click. **Make primary** changes it.
- **Add account**, **Edit** and remove. If you remove the primary account, the next saved one becomes primary. Issued invoices are not affected.
- Every member can see the accounts; only an **owner** can change them.

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8.6 Authorizations

The companies you have activated or are activating, with their state (see §2). **Add authorization** activates another company.

8.7 Users

Manage who has access to the selected company.

Role	Can do
Member	works with documents: inbox, outbox, issuing and uploading invoices, exports, dashboard, number sequences and price list
Owner	everything a member can, plus company details and scope of service, bank accounts, inviting and removing users, and API integrations

Invite a user (owners only):

1. Choose **Invite user**.
2. Enter the **Email address** and choose the **Role** (default **Member**).
3. Choose **Send invitation**.

The invited person receives an email *Pozvánka do e-faktúra portálu — {company}* with the button **Prijať pozvánku** (*Accept invitation*). The link is valid for **72 hours**. They sign in, or create an account with the invited email address, and choose **Accept invitation**. The invitation can only be accepted by an account with the invited address; if they are signed in as someone else, they choose **Sign out and switch account**.

Pending invitations are listed under **Pending invitations**; an owner can **Cancel invitation**. Inviting the same address again replaces the earlier invitation.

Remove access removes a member (owners only). You cannot remove yourself, and the last owner of a company cannot be removed.

A user's role cannot be changed; remove the user and invite them again with the new role.

8.8 Integrations

An integration lets your accounting or ERP system send and receive documents through the efaktura System API (SAPI) instead of the portal. Only **owners** can manage integrations. A company can have at most **10**.

1. Choose **New integration**, enter a **Name** (for example *SAP production*) and choose **Create**.
2. The portal shows the **Client ID** and **Client secret**. Copy both and pass them securely to whoever configures your system. **The client secret is shown only now.** Then choose **I have saved the secret**.

- **Rotate secret** issues a new secret. The old secret stops working immediately, so update your system at the same time.
- **Delete** removes the integration; your system loses access.

The technical details are in the *System Integration Guide (SAPI)*.

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9. Good to know

- **Emails.** The portal emails you only about your account: email confirmation, sign-in codes, password reset and invitations. There are no emails about received or sent documents, finished uploads or exports; check the portal.
- **Your session.** After a period of inactivity you are asked to sign in again.
- **Several companies.** Always check the company switcher before issuing an invoice or exporting.
- **Problems.** If something fails, note the company DIČ, the document number and the time, and contact support.