

Documents

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Adding a document

Documents can be added in several ways:

1. We can use the **bulk upload** option and upload a few or a dozen files at once as unclassified documents to describe them correctly later
2. add directly from the contractor's window.

Documents that are not classified and await classification in the "List of unclassified" tabs are not processed by the system in any way and are not included in summaries and reports. Deleting them in no way affects the values stored in the system.

The document must be attached to the contractor to be analyzed by the system and be visible in reports and other summaries.

Go to the **"Documents"** menu item and click **"Add Document"**.

Select the required counterparty from the list of counterparty and click the **"Add document"** button.

The screenshot shows a sidebar menu on the left with the following items: Dashboard, Reports, Documents, Add document, List invoices, List agreements, List annexes, List of unclassified, Commitments, Counterparties, Accounting systems, Tools, and About us. The 'Documents' menu item is highlighted. The 'Add document' button is also highlighted. The main content area shows a table titled 'List counterparties' with columns for 'Find by VAT Number...', 'Address', and 'Add document'. The table contains two rows of redacted data. The 'Add document' button is highlighted in the second row.

Find by VAT Number...	Address	Add document
[Redacted]	[Redacted]	Add document
[Redacted]	[Redacted]	Add document

Then you need to select the file and classify it.

Finally, you have to click the **"Save"** button.

Save

List counterparties

ID

33

Company Name

Select document file

Wybierz plik test4.pdf

☒ Invoice

☐ Agreement

☐ Agreement annex

Bulk PDF upload

The system enables the batch upload of PDF files to the system.

Mass file upload helps in everyday work with the system.

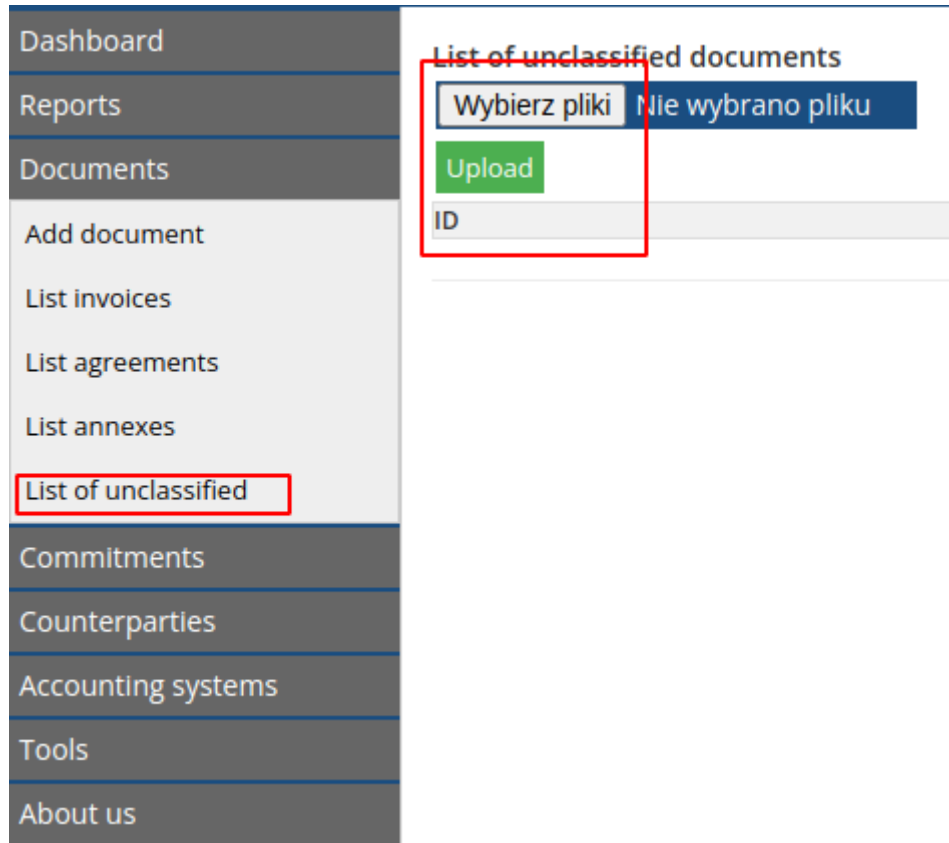
Please keep in mind 2 things:

Documents that are not classified and await classification in the "List of unclassified" tabs are not processed by the system in any way and are not included in summaries and reports. Deleting them in no way affects the values stored in the system.

The document must be attached to the contractor to be analyzed by the system and be visible in reports and other summaries.

To use this functionality:

Go to the "**Documents**" menu item and click "**List of unclassified**".



Then press **"Select Files"**.

In the window that will open, select the required files and confirm your selection.

Then hit the **"Upload"** button

The files are automatically uploaded to the system.

List of unclassified documents

Wybierz plikiNie wybrano pliku

Upload

File test1.pdf OK!

File test2.pdf OK!

File test3.pdf OK!

File test4.pdf OK!

File test5.pdf OK!

File test6.pdf OK!

ID		md5		
170	raw/upload/3a366ccca6c2959de35a86d4308ea520.pdf	3a366ccca6c2959de35a86d4308ea520	Classify	Delete
169	raw/upload/2ca6a36368b78dc9bf5c37cbf6cd5398.pdf	2ca6a36368b78dc9bf5c37cbf6cd5398	Classify	Delete
168	raw/upload/de9449a797fa7b5b9195695da814fee4.pdf	de9449a797fa7b5b9195695da814fee4	Classify	Delete
167	raw/upload/bee7eed5daa61af5eeb478118bb3d002.pdf	bee7eed5daa61af5eeb478118bb3d002	Classify	Delete
166	raw/upload/40149bd92479306abb8d8eb2961292da.pdf	40149bd92479306abb8d8eb2961292da	Classify	Delete
165	raw/upload/9bf2d2f0004d76b35a92fcd36aeddd66.pdf	9bf2d2f0004d76b35a92fcd36aeddd66	Classify	Delete

Attention! If the file already exists in the system, the system will not allow it to be uploaded.

List of unclassified documents

Wybierz plikiNie wybrano pliku

Upload

File test1.pdf ERROR The file is already on the system.

File test2.pdf ERROR The file is already on the system.

File test3.pdf ERROR The file is already on the system.

File test4.pdf ERROR The file is already on the system.

File test5.pdf ERROR The file is already on the system.

File test6.pdf ERROR The file is already on the system.

ID		md5		
170	raw/upload/3a366ccca6c2959de35a86d4308ea520.pdf	3a366ccca6c2959de35a86d4308ea520	Classify	Delete
169	raw/upload/2ca6a36368b78dc9bf5c37cbf6cd5398.pdf	2ca6a36368b78dc9bf5c37cbf6cd5398	Classify	Delete
168	raw/upload/de9449a797fa7b5b9195695da814fee4.pdf	de9449a797fa7b5b9195695da814fee4	Classify	Delete
167	raw/upload/bee7eed5daa61af5eeb478118bb3d002.pdf	bee7eed5daa61af5eeb478118bb3d002	Classify	Delete
166	raw/upload/40149bd92479306abb8d8eb2961292da.pdf	40149bd92479306abb8d8eb2961292da	Classify	Delete
165	raw/upload/9bf2d2f0004d76b35a92fcd36aeddd66.pdf	9bf2d2f0004d76b35a92fcd36aeddd66	Classify	Delete

Classification of PDF files

Go to the "**Documents**" menu item and click "**List of unclassified**".

Go to the viewing mode by clicking the "**Classify**" button. You can use the **Next** and **Previous** buttons to move from file to file.

Unclassified document






[Save](#) [List of unclassified documents](#) [<< Previous](#) [Next >>](#) [Delete](#)


Counterparty

☒ Invoice

☐ Agreement

☐ Agreement annex

addonmodul... 1 / 1 | - 75% + |     



In order to classify a document, select the counterparty and the type of document. Then click the "**Save**" button.

Document types

There are currently 3 types of documents:

1. [invoice](#)
2. [agreement](#)
3. [annex](#) (used to correct / overwrite contract parameters)

Viewing/Editing the Agreement

Go to the "**Documents**" menu item and click "**Agreement list**".

Use the date buttons to select a sort date.

After selecting the desired agreement, click on the agreement number or the edit button.

Agreements

>2020< 2021

>10<

d	Find by Company Name...	Commitment name	Commitment date	Expiry date	
n/a		Usługi księgowe	2020-10-01	0000-00-00 ∞	Edit
UMOWA O PROWADZENIE KSIĄG RACHUNKOWYCH					
Usługi księgowe całego segmentu firmy.					

A preview of the document will open and its data can be edited.

- Number (Document number, if any)
- Description
- Conclusion date (Date of signing the document)
- Commitment date (Date on which the subject of the contract comes into force)
- Expiry date (Date until which the subject of the contract is valid)
- Notice period (notice period in days)
- Indefinite period (Select this option if the contract is signed for an indefinite period or becomes indefinite after its expiry)

Agreement [redacted] VAT Number: [redacted]

Save List agreements Unmapping

List of commitments:
Usługi księgowe (Usługi księgowe
całego segmentu firmy.)

ID

2

Number

n/a

Description

UMOWA O PROWADZENIE KSIĄG
RACHUNKOWYCH

Conclusion date

01.10.2020

Commitment date

01.10.2020

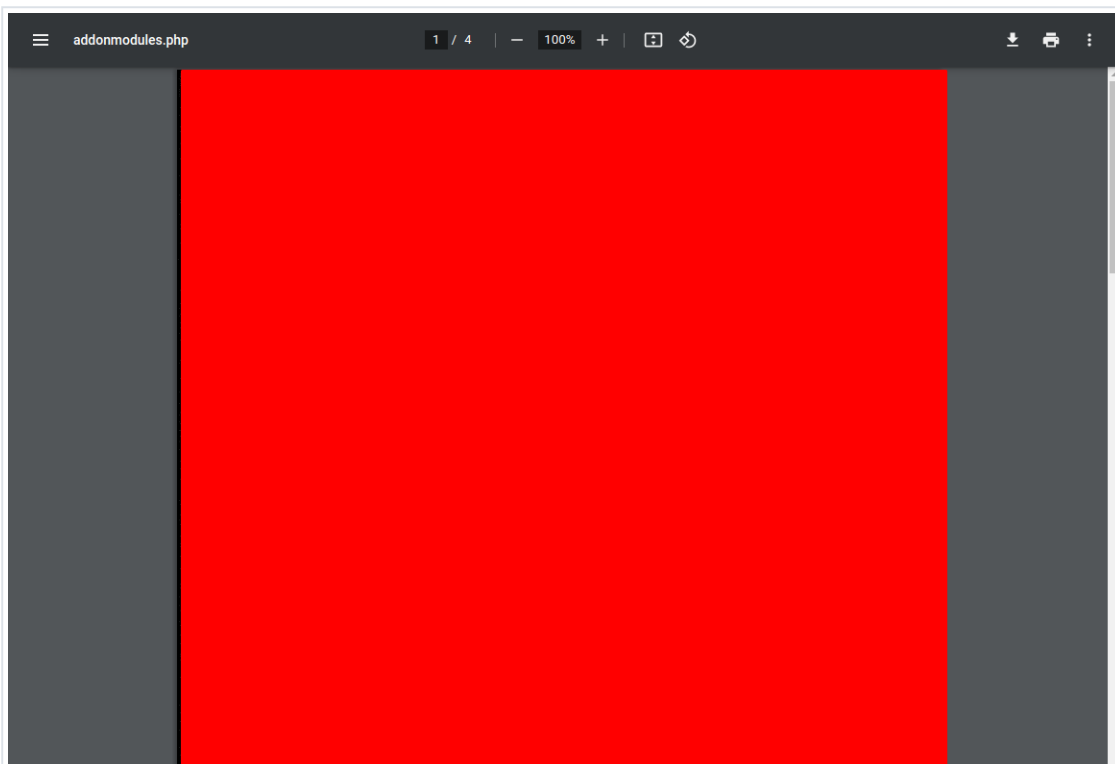
Expiry date

dd.mm.rrrr

Notice period (days)

☒ Indefinite period

List annexes:



To save the changes, you must click the **"Save"** button.

Viewing/Editing an Invoice

Go to the "**Documents**" menu item and click "**List invoices**".

Use the date buttons to select a sort date.

After selecting the required invoice, click on the invoice number or the "**Edit**" button.

Dashboard	Invoices
Reports	2020 >2021<
Documents	01 02 03 04 05 06 07 08 09 >10< 11
Add document	50
List Invoices	Netto Brutto Company Name Commitment
List agreements	FV/2021/10/50(2021-10-02) 300.00 zł. 369.00 zł. [REDACTED] Usługi księgowe
List annexes	#OBSŁUGA KSIĘGOWA #Księgowość Usługi księgowe całego segmentu firmy.
List of unclassified	[REDACTED] Edit
Commitments	
Counterparties	
Accounting systems	
Tools	
About us	

A preview of the document will open and its data can be edited.

- Number (Document number)
- Netto, Brutto, VAT (Actual invoice data)
- Document Date (Invoice issue date, actual invoice data)
- Receipt Date (Date when the document was actually delivered)
- Tags (Words or phrases that will help in the future in finding an invoice. For example: laptop, computer technology, office, Warsaw)

Invoice [REDACTED] VAT Number: [REDACTED]

[Save](#) [List Invoices](#) [Unmapping](#)

Commitment

[Go to commitment](#)

Usługi księgowe | Usługi księgow

☐ Create new commitment

ID

84

Number

FV/2021/10/50

Netto

300,00

VAT

69,00

Brutto

369,00

Document Date

02.10.2021

Receipt Date

02.10.2021

Tags

OBSŁUGA KSIĘGOWA

Księgowość

(anonymous)

1 / 1 | 100% + |

Sprzedawca

Nabywca

Lp.	Nazwa	PKWiU	Ilość	Jm	Cena netto	Wartość netto	Stawka VAT	Kwota VAT	Wartość brutto
1	OBSŁUGA KSIĘGOWA	xxx	1,00	szt	300,00	300,00	23%	69,00	369,00
						300,00	23%	69,00	369,00
						RAZEM	300,00	69,00	369,00

Razem do zapłaty: 369.00 PLN

Uwagi

Zapłacono: 0.00 PLN

Pozostało: 369.00 PLN

Odbiorca:

Wystawca:

To save the changes, you must click the **"Save"** button.

Viewing/Editing an annex to the Agreement

The annex is used to change the terms of the contract without editing the contract itself and helps to maintain the proper hierarchy of documents in line with reality.

Go to the "**Documents**" menu item and click "**List annexes**".

After selecting the required annex, click on the number or the "**Edit**" button.

Dashboard

Reports

Documents

Add document

List invoices

List agreements

List annexes

List of unclassified

Commitments

Counterparties

Annexes

Find by number/Description...

Find by Company Name...

	Agreement	Commitment date	Expiry date	
Anex 1	n/a			
Umowa zawarta do 30 czerwca 2021.	UMOWA NAJ/MU Lokal	2021-04-12	2021-06-30	Edit

A preview of the document will open and its data can be edited.

- Agreement (Select the agreement to which the annex belongs)
- Number (Document number, if any)
- Description
- Conclusion date (Date of signing the document)
- Commitment date (Date from which the subject of the annex comes into force)
- Change the contract - check the box if the annex changes the terms of the agreement, such as:
 - Agreement expiry date (Date until which the subject of the agreement is valid)
 - Agreement notice period (Agreement notice period in days)
 - Agreement for an indefinite period (Select this option if the contract is indefinite or becomes indefinite after its expiry)

If you select the "Change contract" option, the annex will practically overwrite the contract values.

Annex [REDACTED] VAT Number: [REDACTED]

Save List annexes Unmapping

Agreement

n/a | UMOWA NAJMU Lokal [REDACTED] ▼

[Go to agreement](#)

ID

16

Number

Anex 1

Description

Umowa zawarta do 30 czerwca 2021.

Conclusion date

12.04.2021 

Commitment date

12.04.2021 

☒ Change agreement

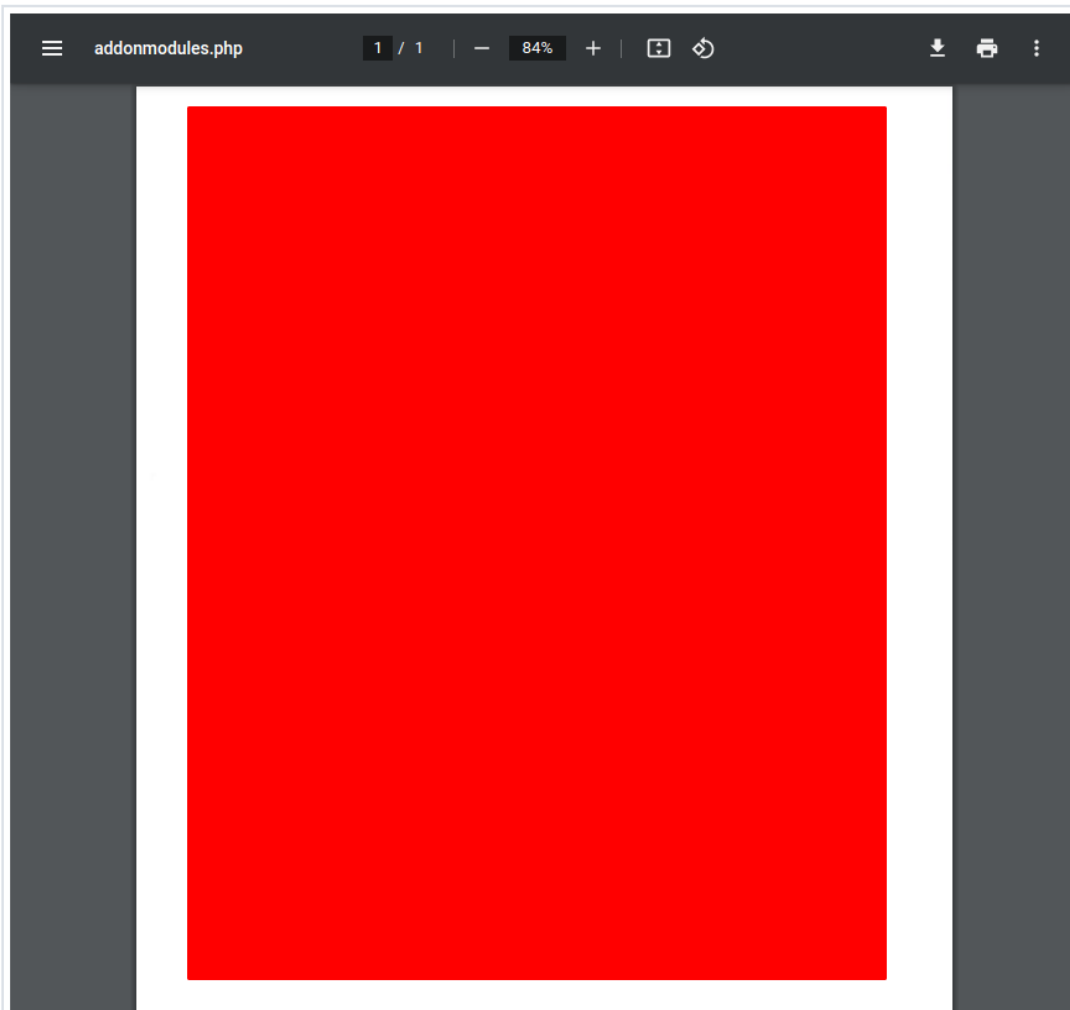
Agreement expiry date

30.06.2021 

Agreement notice period (days)

30

☐ Agreement indefinite period



To save the changes, you must click the **"Save"** button.

Unmapping documents

If for some reason it is necessary to move the document to an unclassified state, for example, if the document has been incorrectly classified, we have this option in the system.

To **unmap** a document, make sure the document has no dependencies:

- Relationship Invoice -> Commitment
- Relationship Agreement -> Commitment
- Relationship Agreement -> Agreement annex.

Find the document you want to move to an unclassified state.
Open its Viewing/Editing.

Click the **"Unmap"** button

Then confirm the action by clicking the **"OK"** button

Invoice [redacted] VAT Number: [redacted]

Save **List invoices** **Unmapping** **Anuluj** **OK**

You definitely want to unmap the document?

Commitment

Go to commitment

No commitments

☐ Create new commitment

ID

84

Number

FV/2021/10/50

Netto

300,00

VAT

69,00

Brutto

369,00

Document Date

02.10.2021

Receipt Date

02.10.2021

Tags

OBSŁUGA KSIĘGOWA x

Księgowość x

(anonymous) 1 / 1 100%

[redacted]

[redacted]

Lp.	Nazwa	PKWiU	Ilość	Jm	Cena netto	Wartość netto	Stawka VAT	Kwota VAT	Wartość brutto
1	OBSŁUGA KSIĘGOWA	xxx	1.00	szt	300,00	300,00	23%	69,00	369,00
						300,00	23%	69,00	369,00
RAZEM						300,00		69,00	369,00

[redacted]

Uwagi

Odbiorca: Wystawca:

After a document is successfully unmapped, the document enters the unclassified state. It will be in the menu item "**Documents**" -> "**List of unclassified**".

Deleting PDF files

To delete a PDF file, you must

Go to the "**Documents**" menu item and click "**List of unclassified**".

On the file you want to delete, click the "**Delete**" button

Then confirm the action by clicking the "**OK**" button

Are you sure you want to delete the document?

AnulujOK

List of unclassified documents

Wybierz plikiNie wybrano

Upload

ID	md5		
170	raw/upload/3a366ccca6c2959de35a86d4308ea520.pdf	3a366ccca6c2959de35a86d4308ea520	<div>ClassifyDelete</div>
169	raw/upload/2ca6a36368b78dc9bf5c37cbf6cd5398.pdf	2ca6a36368b78dc9bf5c37cbf6cd5398	<div>ClassifyDelete</div>
168	raw/upload/de9449a797fa7b5b9195695da814fee4.pdf	de9449a797fa7b5b9195695da814fee4	<div>ClassifyDelete</div>
167	raw/upload/bee7eed5daa61af5eeb478118bb3d002.pdf	bee7eed5daa61af5eeb478118bb3d002	<div>ClassifyDelete</div>
166	raw/upload/40149bd92479306abb8d8eb2961292da.pdf	40149bd92479306abb8d8eb2961292da	<div>ClassifyDelete</div>
165	raw/upload/9bf2d2f0004d76b35a92fcd36aedd66.pdf	9bf2d2f0004d76b35a92fcd36aedd66	<div>ClassifyDelete</div>

It is also possible to delete a file from the preview mode.

Go to the viewing mode by clicking the "**Classify**" button. You can use the "**Next**" and "**Previous**" buttons to move from file to file.

On the file you want to delete, click the "**Delete**" button.

Unclassified document

Save

List of unclassified documents

<< Previous

Next >>

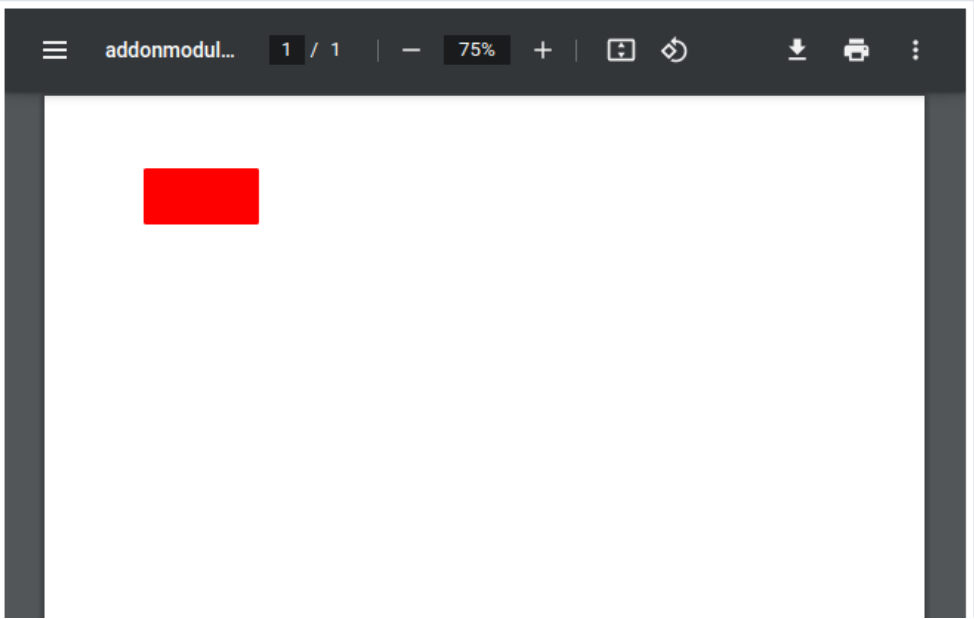
Delete

Counterparty

Invoice

Agreement

Agreement annex



Then confirm the action by clicking the "OK" button