Objects availability – General information

Object Availability panel is used to manage availability of objects dedicated for particular centers of the company rights structure. This functionality is available for users included in operator groups with granted permission *Management of object availability in the rights structure.* Permissions can be assigned to operator groups from the level of *Configuration → Rights Structure → Operator Groups → tab Other Permissions.*

Managing of object availability can be performed:

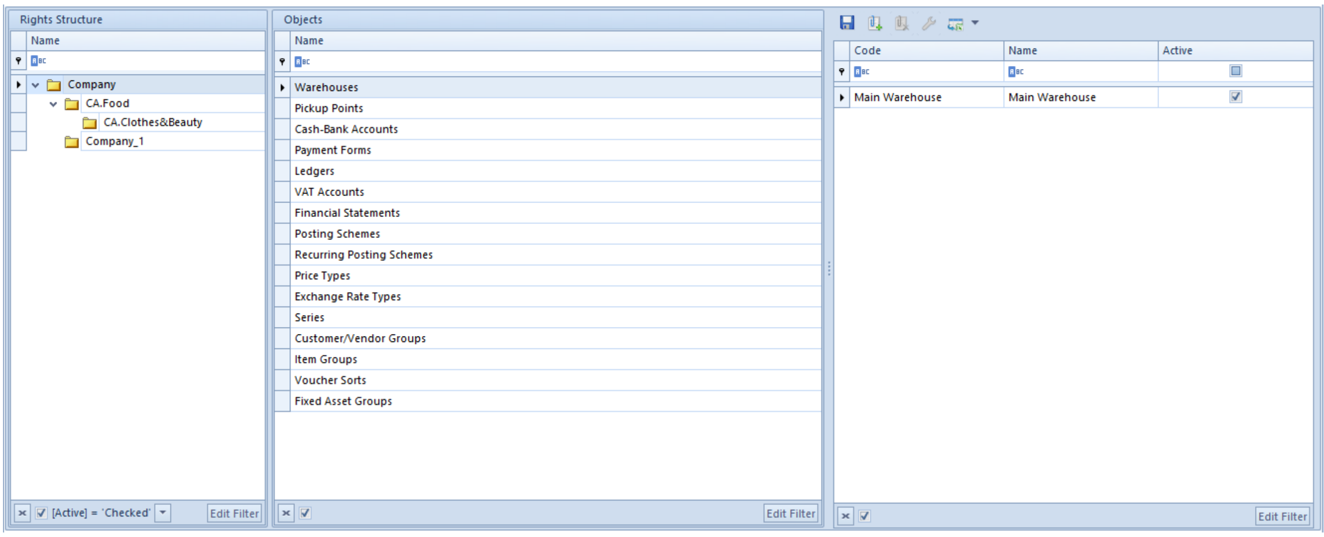
- globally for all the centers, in menu *Configuration → Rights Structure → Object Availability*
- locally, within a specific center, in menu *Configuration → Rights Structure* → center form → [**Object Availability**] button. The window of rights structure is not available from that level.

The panel of object availability is composed of the following sections:

- **Rights structure** – company structure tree with the possibility of adding columns, hidden by default, providing information about type and activity status of a center (the window is available from the level of *Configuration → Rights Structure → Object Availability* only).
- **Objects** – objects available for assigning to a given center. The list contains a column with object name and, in case of selecting a child center, parameter *Get From Parent Center.* If the parameter is checked, a child center "inherits" the values of objects from the parent center. Deactivating the parameter allows user for assigning manually values of objects to a child center.

A column *Area*,

- **List of values assigned to a selected type of object** – in case of a parent company, centers of *Company* type and child centers with unchecked parameter *Get From Parent Center*, there are buttons [**Attach**]/[**Detach**] available in the menu, which allow for attaching or detaching a specific object from the list of values. Upon clicking [**Attach**], a list of objects defined in Comarch ERP Standard system opens, from which a given object should be selected with the use of [**Select**] button. Additionally, in case of some objects, there is button [**Edit**] available, which enables additional configuration of objects being attached. Button [**Save**] saves the entered changes for an object, whereas [**Export To Spreadsheet**] button allows for exporting data from the list to a spreadsheet.



Panel Objects Availaibility along with the list of objects of the main company

Note
In case of centers of Comarch e-Shop and Mobile type, it is not possible to check the parameter for objects which cannot be inherited from a parent center.
Objects added to the system from the level of any structure

center are automatically added to the parent company (root) and to the company (center of *Company* type) parent to the given center. Availability of those objects in other child centers (within the company) depends on setting of the parameter *Get From Parent Center*.

All objects defined in the system are displayed only in the parent company (root). From the level of a child center (while being logged-in to that center), a given list of objects, e.g., warehouses, contains objects attached to a company (center of Company type) which is parent to that center. Since the list includes also objects which are not attached directly to the center in which the list is displayed, their edition is limited, e.g., tab *Stock Level Management* is not provided for a warehouse not available in that center

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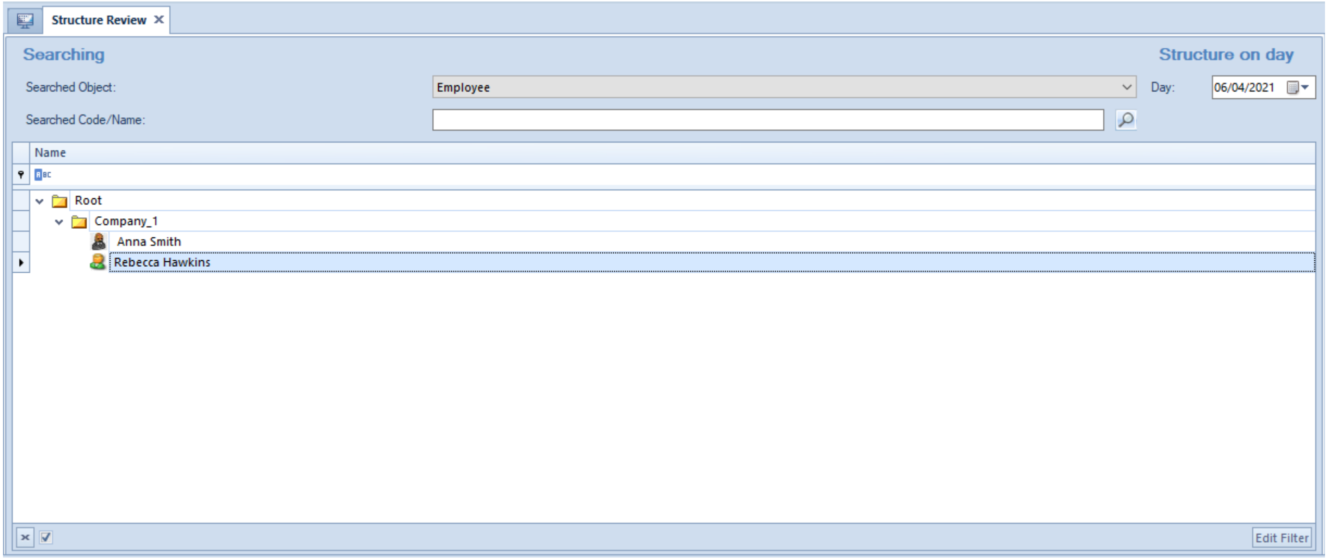
Subordination structure

Subordination structure tree

Subordination structure is a set of organizational units of a company and employees assigned to them. Owing to hierarchical presentation of the structure, based on the list of employees defined in the system, a user is provided with information about relations between employees, irrespective of the company rights structure.

The company structure window is available from the level of *Configuration → Company Structure → Subordination Structure.*



Tree of the subordination structure

Subordination structure is presented in form of a tree. The main tree group is *Root* group to which all the other organizational units and employees are attached. *Root* group can be edited in any way but it cannot be deleted. A user can define own organizational structure of a company and establish any relations between employees.

Section *Structure on day* allows user to preview history of company structure on a given day. The date can be entered manually or selected from a built-in calendar.

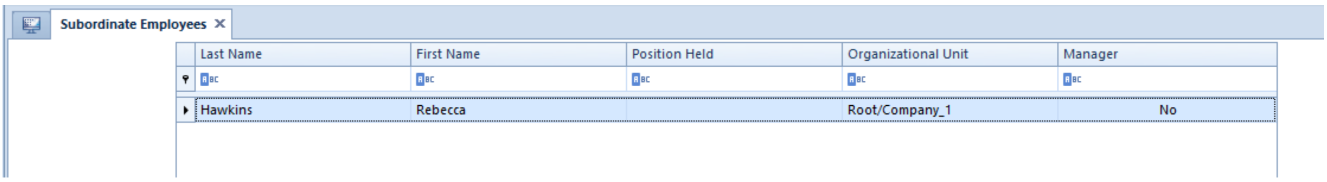
Section *Searching* is particularly useful in case the structure is very complex. In order to search a given object in the structure, it is necessary to specify the searched object (*Employee* or *Organizational Unit*) in *Searched Object* field, type the first and last name of employee or name of organizational unit in *Searched Code/Name field.* Then click [**Search**] in the *Structure* button group or click on the magnifying glass icon available next to the field *Searched*

Code/Name to start searching. The searched objects will be highlighted in the tree structure.

In the menu, there are standard buttons for adding/deleting/saving a given object (organizational unit or employee) in the tree structure and for refreshing it.

Moreover, an employee selected on the structure tree can be marked as manager in a given organizational unit by clicking [**Manager**] → [**Promote To Manager**]. An opposite process can be performed with the use of button [**Manager**] →[**Downgrade From Manager**].

Button [**Show Subordinates**] displays a list of all employees subordinate to a given manager in the structure.

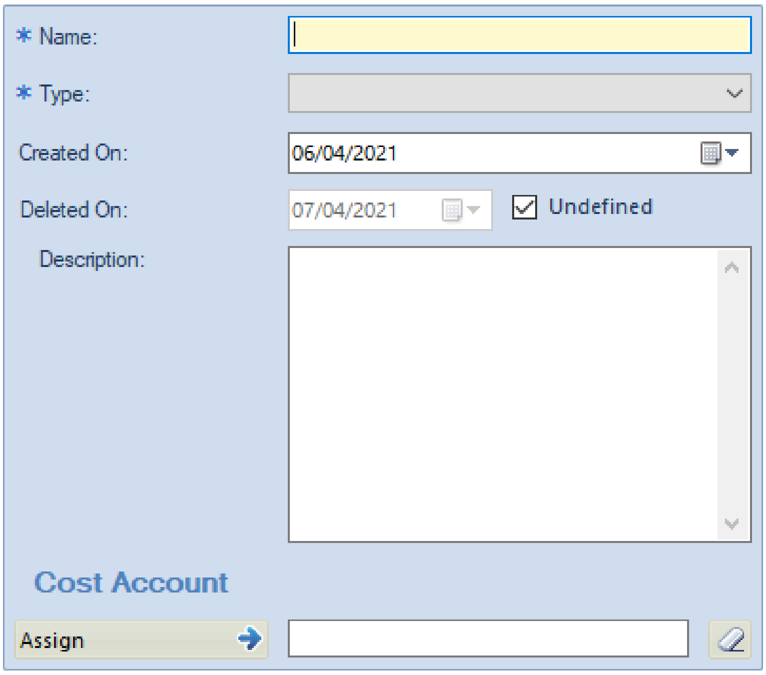


List of employees subject to the manager in the subordination structure

Defining organizational units

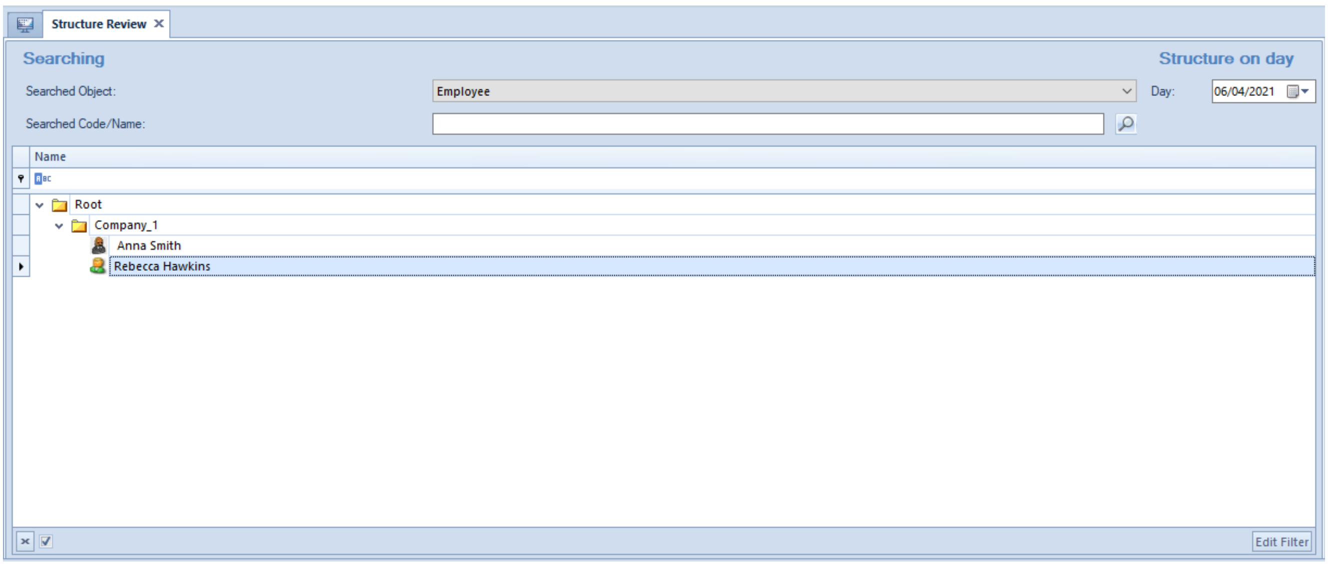
Organizational unit is any unit operating within company structure e.g. center, location, department, etc.

In order to add an organizational unit, mark the *Root* group (or a unit subordinate to it) on the structure tree and then click on the [**Add]** button and then [**Add Unit**].



Form of organizational unit definition

- **Name** – name of an organizational structure must be a unique value
- **Type** – drop-down list to which it is possible to add own types of organizational unit with the use of button [**Add Type**] in the menu



Adding of organizational unit type

Editing of a given unit type is performed in **Edit in place**

mode, so directly on the list. Upon saving the changes and closing the list, click on [**Refresh Types**] for the data to be updated in field *Type.*

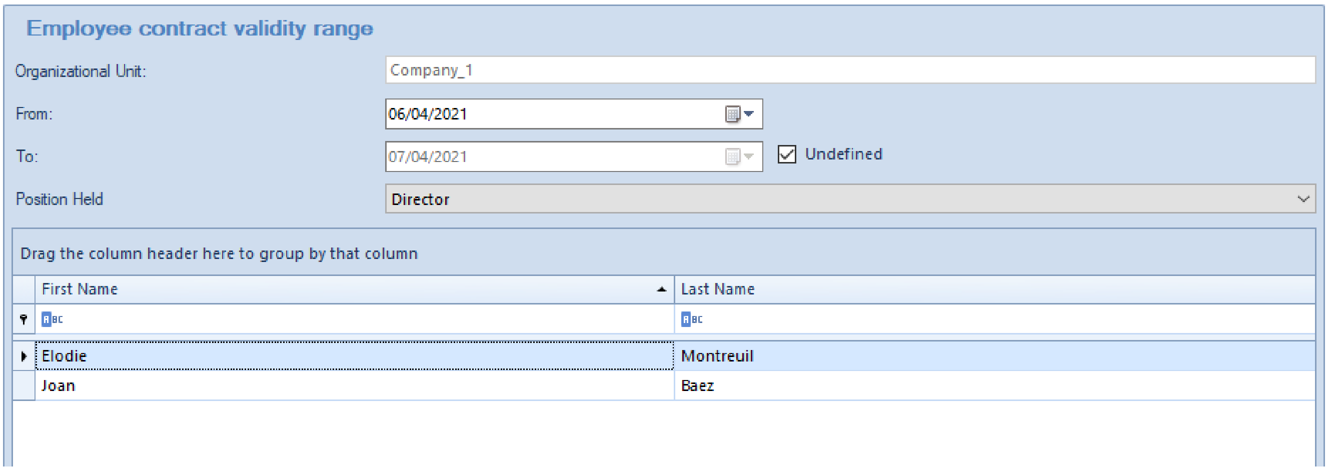
- **Created On** – allows user to define date of organizational unit creation. Date of creation of a subordinate unit cannot be earlier than its parent unit creation date. It can be entered manually or selected from a built-in calendar.
- **Deleted On** – allows user to define date on which unit will stop existing in company structure. Unit date of deletion cannot be later than its parent unit deletion date. It can be entered manually or selected from a built-in calendar.
- **Description** – in this field it is possible to enter additional notes to the added organizational unit
- **Cost Account** – this section allows user to determine organizational unit as a cost unit in the company subordination structure. Button [**Assign**] opens the list of cost accounts, from which it is necessary to select the account which is to be assigned to the unit. Clicking on the button with eraser icon erases the selected account. More information can be found in article <<Chart of accounts>>.

After filling in the form and saving changes, a unit is added to the subordination structure tree.

The subordination structure must be defined in order to be able to activate <<CRM module>> in the system.

Adding an employee to organizational unit

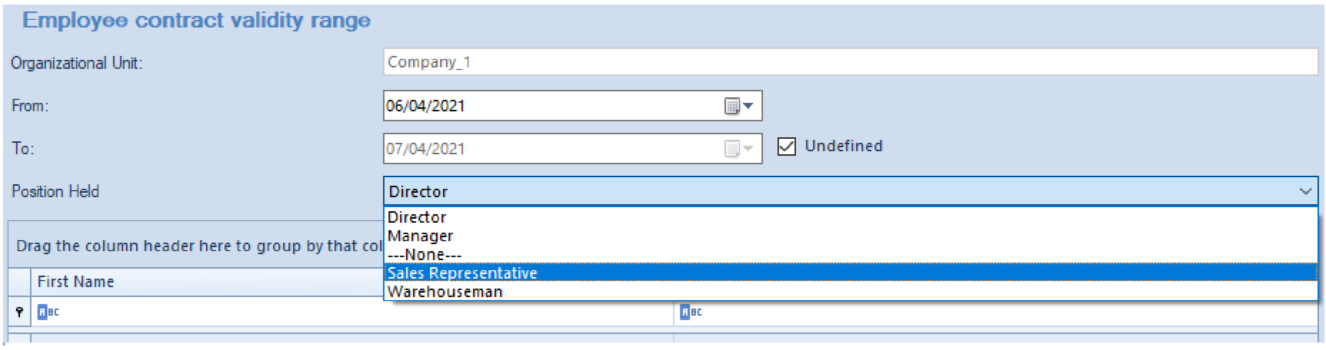
In order to add an employee to an organizational unit, mark ta given organizational unit on the structure tree and then click on the [**Add]** button and then [**Add Employee**]. A list of employees will be displayed, from which a specific employee must be selected.



Employee selection window

From the level of employee selection window, it is possible to specify duration of employee contract validity range, that is the date of assigning that employee to an organizational unit (in field *From*) and the date from which the employee no longer belongs to the company subordination structure (in field *To*).

Field *Position Held* allows for assigning appropriate position from among <<positions defined>> in the system to an employee.

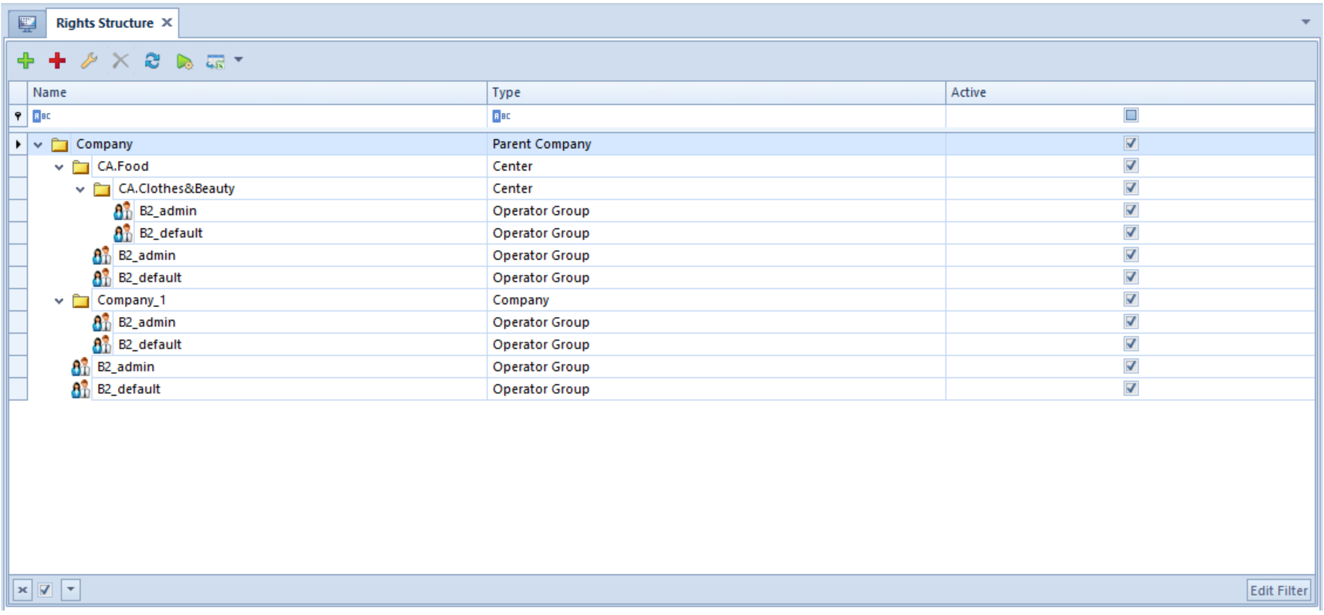


List of defined positions.

After filling in the data and clicking [**Select**], an employee will be added to the subordination structure tree.

Rights structure

In menu *Configuration* → *Company Structure* → *Rights Structure* there is a list of all centers defined in the system. From this level it is possible to add new centers to the company structure.



Exemplary rights structure tree

The list is presented in from of a tree, which clearly shows relations between centers (inferiority, superiority and the parallelism) and the operator groups assigned to the centers.

Column *Type* displays type of a structure center, whereas column *Active* indicates centers to which it is possible to log in.

For newly created databases, the rights structure contains only one center – *Main Company.* This is the main center of the company structure (root) to which other centers can be attached.

During conversion of database from Comarch ERP Standard system versions previous to version 2015.0, an appropriate window referring to configuration of the rights structure conversion is displayed.

Selecting the option *Leave the main node unchanged* means that a given company will become the parent company. Whereas selecting the option *Convert the main node to center of Company type* adds a new main node – Parent Company – one level up in the rights structure.

The multi-company models make it possible to handle many companies in one database. In this case, *Parent Company* node can act as:

- an administration center from the level of which it is possible to access all the data, objects and documents used in child centers
- a company running operating activity and being add the same time superior to all the other companies (centers of Company type)

Center of *Company* type can be treated as an equivalent to one of enterprises in a holding, while other centers of the structure correspond to an organizational unit within a given company.

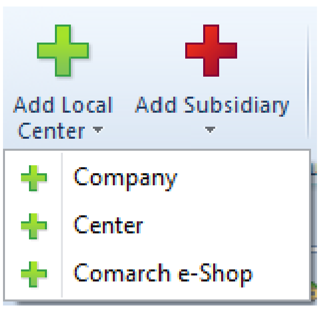
Standard buttons for editing/deleting a given object (center) from the structure tree and for refreshing it are available in the menu bar. Editing of a given company from the rights structure level enables accessing the same functionalities as when editing a company (to which a user is currently logged-in to) from the level of *Configuration → Company Structure → Company.*

Moreover, it is possible to create a shortcut to editing of a given center on the system desktop by selecting option [**Add shortcut to system desktop**], available in the context menu (opened upon clicking the right mouse button).

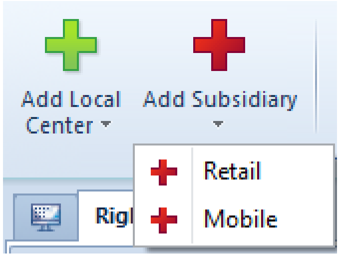
Buttons [**Up**] and [**Down**] allow for managing location of a selected center in the structure. Button [**Attach Group**] opens the list of operator groups defined in the system. Here the user can select a group which will be attached to a center. Button [**Detach** Group] detaches a group from the structure center. Operators not included in any of the groups attached to a given center are not able to login to that center.

Note
The group *B2_admin* cannot be detached from the main structure center.
Buttons for defining new rights structure center:

- [**Add Local Center**] – opens form for defining a new local center of the rights structure, depending on selected type:
  - *Company*
  - *Center*
  - *Comarch e-Shop*



- [**Add Subsidiary**] – opens a form for defining a new distant center of the rights structure of the *Mobile* type



Adding a center of the *Company* type

In order to add a new center of Company type, click [**Add Local Center**] and then [**Company**].

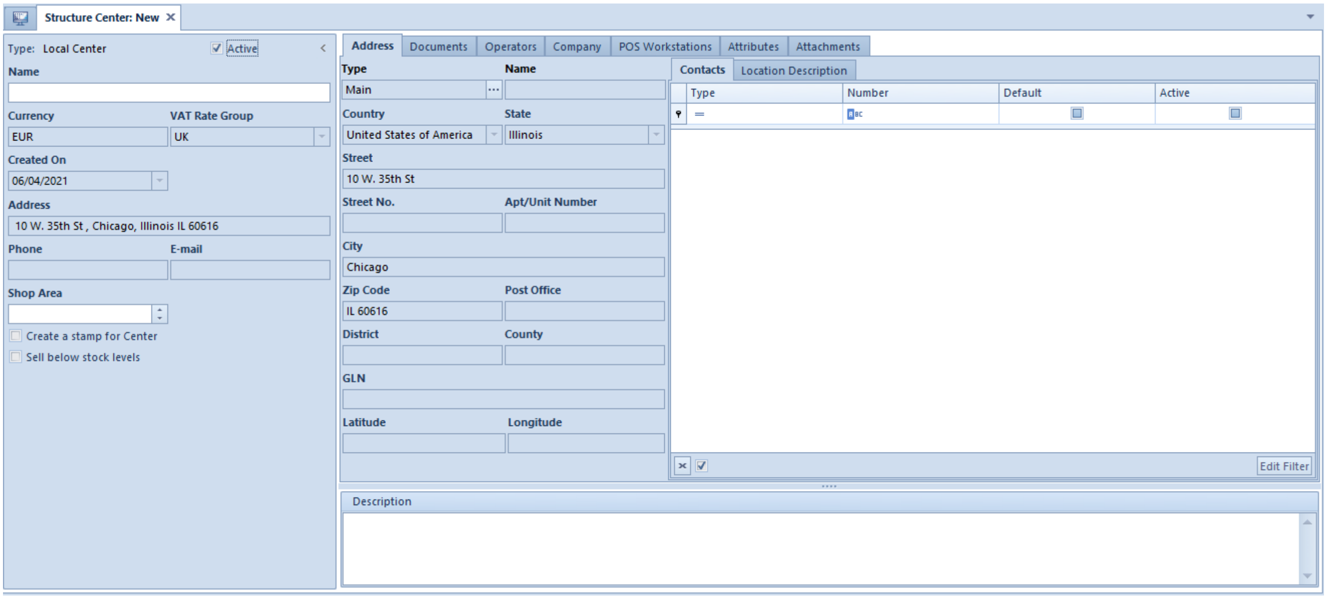
Note
A center of Company type can only be added to the parent company.
In opened company form, it is necessary to fill in relevant details in the side panel and the respective tabs of the company form and determine permissions which are available upon clicking on [**Object Availability**] button. Detailed information can be found here.

Note
For a center of the *Company* type, there must be a default price type (for released and received items) assigned as well as an exchange rate type (for which base currency is consistent with system currency of a company). Otherwise, it will not be possible to save the company form.

Adding a local center

In order to add a new local center, click [**Add Local Center**] and then [**Center**]. Subsequent steps of defining a center are the same as those described above.

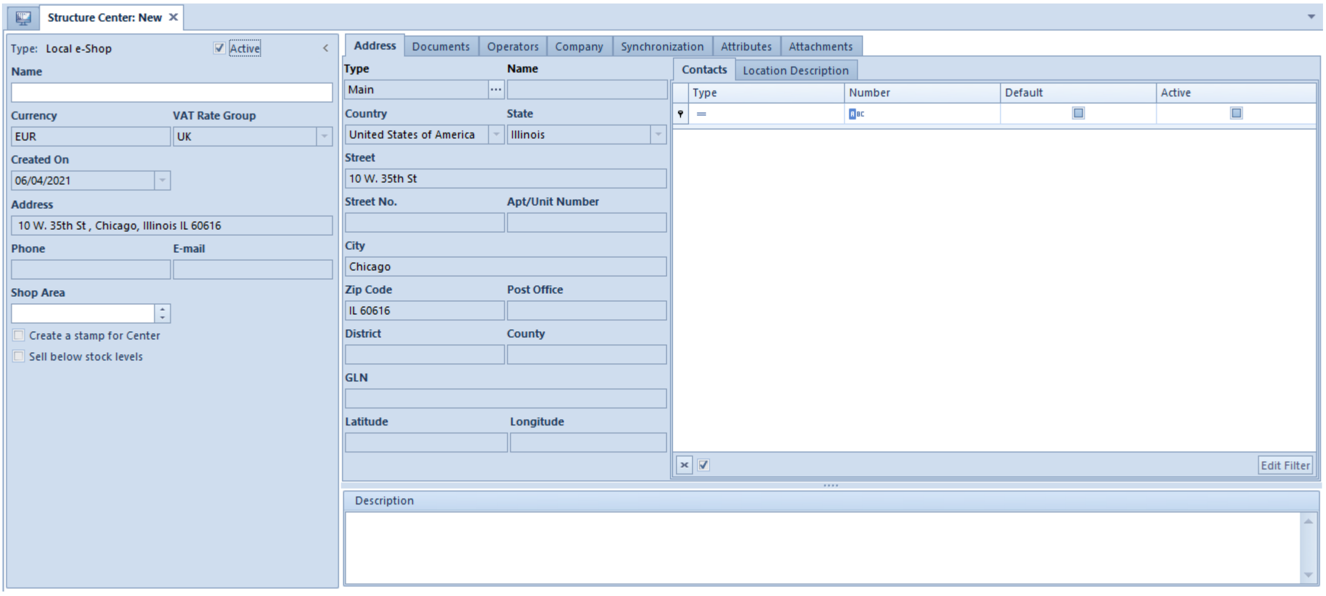
Additionally, in the lateral panel, there is parameter *Create* a *Stamp for Center*, which allows for displaying different address details than those of a company in document printouts.



Form of new local center

Adding a center of the *Comarch e-Shop* type

In order to add a new center of Comarch e-Shop type, click [**Add Local Center**] and then [**Comarch e-Shop**]. A center of Comarch e-Shop type is defined in the same way as a local center, but in case of a center of Comarch e-Shop type, data in *Synchronization* tab and permissions to additional objects: *Customer/Vendor Groups*, *Item Groups*, *Generic Directory Value*, *Additional Units of Measure*, and *Consents* must be specified from the level of *Object Availability* panel.



Form of new center of e-Shop type

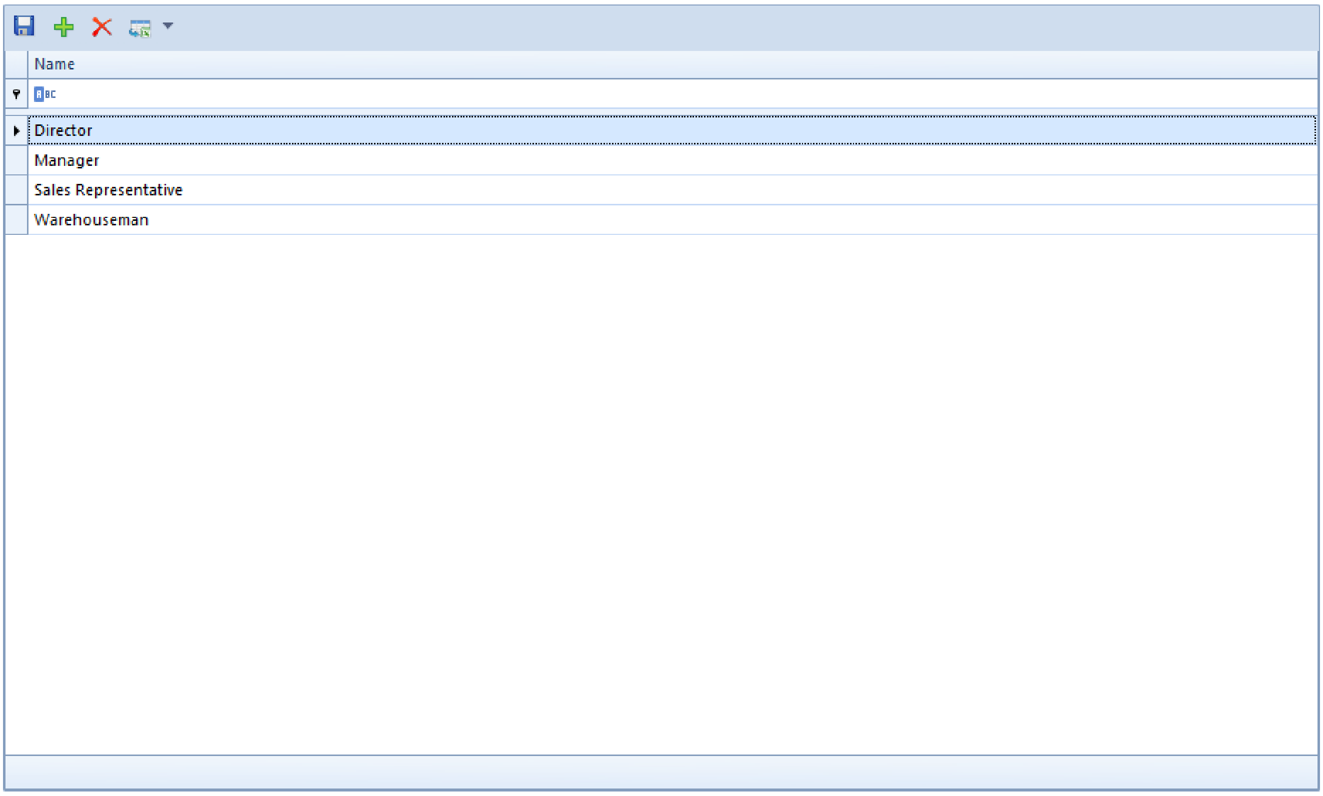
Adding a subsidiary of the *Mobile* type

In order to add a subsidiary of Mobile type, click [**Add Subsidiary**] and then [**Mobile**]. A subsidiary of Mobile type is defined in the same way as a local center, but in case of a subsidiary of Mobile type, data in *Synchronization* tab and permissions to objects: *Customer/Vendor Groups* and *Item Groups* must be specified from the level of *Object Availability* panel.

Positions

The list of positions is available from the level *Configuration → Company Structure → Positions.*

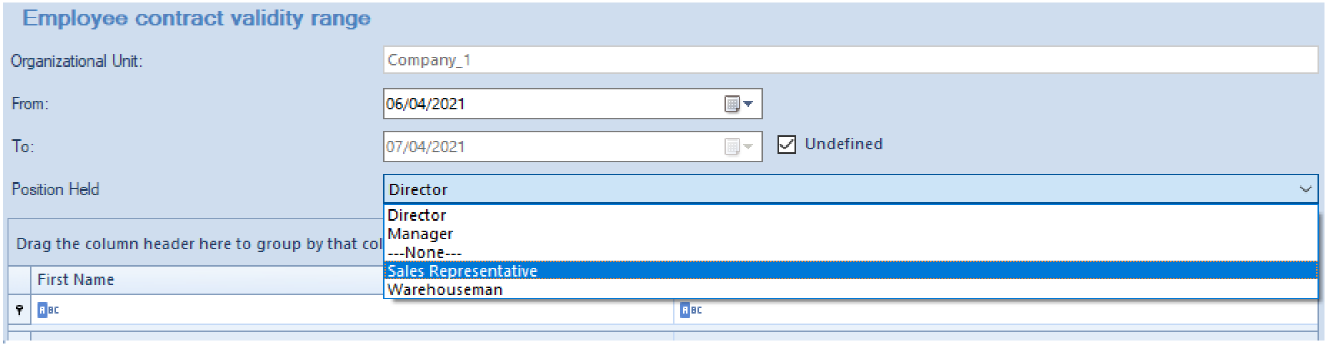
Positions defined by the user can be assigned to employees in the company subordination structure.



List of positions

In the menu, there are standard buttons for adding/deleting an object (position), saving changes, as well as refreshing and closing the list.

Button [**Add**] adds another row on the list, where it is possible to define a new position. Upon entering the name of the position and saving changes, the list of position becomes available in the window *Selecting Employee* which appears during the process of adding an employee to the <<subordination structure>>.



List of positions available when adding an employee to the subordination structure

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Company structure – Company

General information

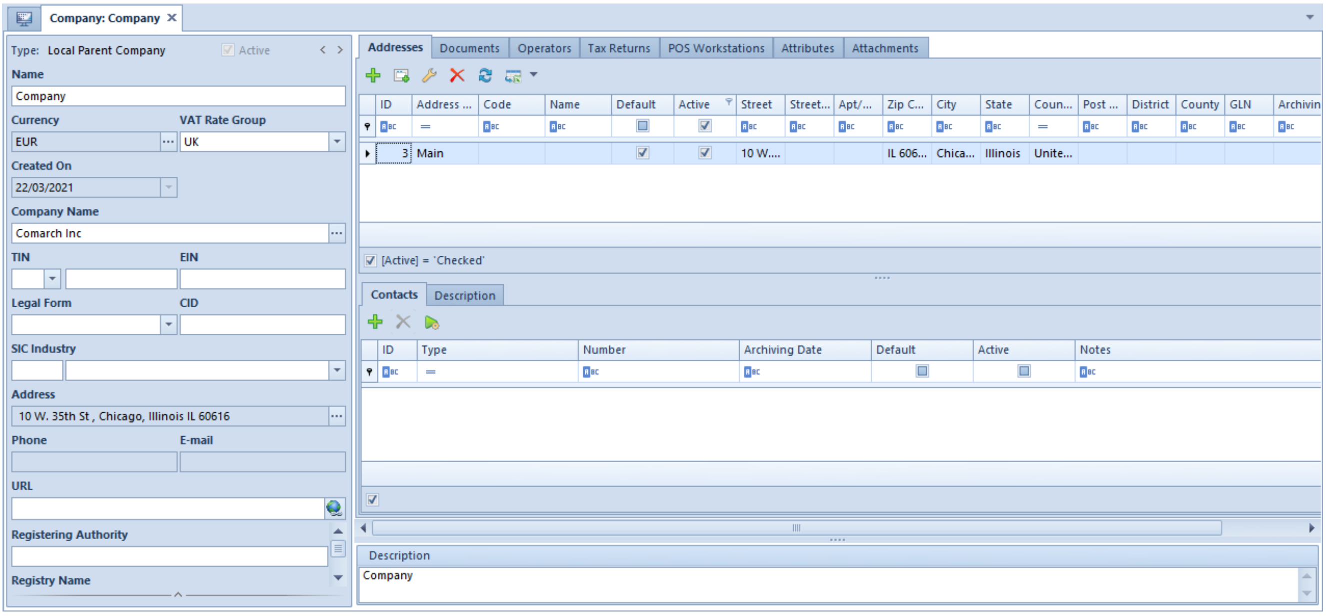
In menu *Configuration → Company Structure*, there is information about a company to which a user is currently logged-in.

The data is presented:

- on the main company form – if the user is logged-in to the main company or its child center
- on the form of a center of *Company* type – if the user is logged-in to a center of company type or its child center

Form

In the left panel of the form, there is basic information about the company, whereas on the right side, there is information included in a currently selected tab, and a field allowing the user to enter an additional description of the company.



Form of center of Company type

Basic information referring to a company:

- **Type** – type of structure center
- **Active** parameter indicating activity status of a given canter (it cannot be deactivated for the main company)
- **Name**
- **Created On** – Non editable field
- **Currency** – field for selecting system currency. Button […], which opens the list of currencies defined in the system, is active for the main company and for centers of *Company* type until changes on the form are saved. For child centers, system currency of the parent company is set, by default. For newly created databases, system currency is consistent with language of a database is

set for the parent company.

Note
In French version of the system during creation of a database, chart of accounts is created by default. Owing to that, button […] in *Currency field* is inactive for the parent company. It will be possible to change system currency of the parent company once the chart of accounts is deleted.

- **VAT Rate Group** default VAT rate group assigned to a company. The field is active for the parent company and for centers of Company type, until the first document is issued. The system allows for assigning of different VAT rate groups to centers of Company type, owing to which it is possible to determine various VAT rates for an item or item group in dependence of a company. The list of VAT rate groups is available from the level of generic directories.
- **Company Name** field for selecting a customer/vendor the company can be associated with. Upon clicking on the ellipsis button […], the following message is displayed: *"The company data will be filled in with information (Code, Name, Tin, EIN, URL, Legal Form, Industry, SIC) of the selected customer/vendor. Do you want to continue?".* Upon accepting the message, the system automatically fills in the mentioned fields according to data defined on selected customer/vendor form and marking that customer/vendor as internal (tab *Trade* of a customer/vendor form). One customer/vendor can be associated with one center of *Company* type only. An internal customer/vendor can be changed until he/she is used in the system or a center with which he/she is associated is used, e.g., by means of issuing a document for that customer/vendor.
- **TIN** – TIN of a company or of the associated internal customer/vendor. This field is composed of a drop-down list of prefixes for individual countries and a field for entering the number. It must be specified in case of

multi-company structure enterprises. When logging in to the system, the entered TIN is verified with the TIN registered in user’s license key.

- **EIN** – EIN of a company or of the associated internal customer/vendor
- **Legal Form** – field with a drop-down list for selecting legal form of a company
- **CID** – creditor identification number applied for entities without TIN number
- **SIC** Industry – field for selecting a standard industrial classification number and a relevant industry branch
- **Address** – main address presented as company seal on document printouts. In order to change the main address, it is necessary to click on […] button which opens a list of defined addresses. From this level it is necessary to add end edit contacts which will be presented on the form, in fields *Phone* and *E-mail.*
- **Telephone**
- **Email**
- **URL** – website address

Below, the user can expand an additional section and complete the form with data regarding a relevant authority which registered the company upon its creation:

- **Registering Authority**
- **Registry Name**
- **Number in Registry**
- **Registration Date**
- **Share Capital**
- **Paid-in Capita**
- **Shop Area** – additional field for specifying the area of a shop (building) in square meters

The parameters available below are divided into three areas:

section *Trade*

- **Sell below stock levels** – parameter allowing for selling items which are currently not available (no resources in warehouse). The function of sale below stock levels is described in Sales below stock levels article. The value of the parameter can be changed at any moment during work with the system. The possibility to uncheck it depends on shortages registered in the system. Until they are deleted, the parameter is greyed out.
- **Monitor SENT transport** – this parameter makes possible monitoring the carriage of goods by road. It is available only for centers of *Company* type.
- **Handle reverse charge** – parameter activating reverse charge handling. It can be edited until the first document handling reverse charge is registered in the system.
- **Compliance with French VAT law** – parameter available if the VAT rate selected is: *FR.* Selecting the parameter brings a number of functional changes in the system, resulting from the adaptation of the system to the requirements of the French VAT law:
  - *Retail sales blockade* – it blocks, among others, the handling of receipts and their corrections, printing invoices on a receipt printer, or the handling of sales and advance invoices and their corrections if no customer TIN is given in a document. Detailed description of the functionality can be found in article Receipts.
  - *Keeping a record of special events* – the system logs events specified by the law in order to track the operational consistency of the system and data integrity.
  - *Digital signature verification* – the functionality is available for invoices, receipts, duplicate receipts, special events, Grand Total Period reports, and archives is available from the level

    of *Configuration → Tools -> Digital Signature Verification.*
    - *Printout history* – handling of the functionality of identifying duplicates of receipts printed on POS workstations.
    - *Grand Total Reports* – handling of the list of reports generated on POS workstation available in menu *Sales → Grand Totals (Tax Files).* In the field Archive Folder located under the parameter *Compliance with French VAT law, i*t is possible to choose a drive location where tax files will be saved.
- **Print Receipts** – parameter available in the French version of the database with checked parameter *Compliance with French VAT law.* It allows for omitting printing of a receipt with a value below a defined value. After selecting option *Above the value,* additional field is presented, where it is possible do define a value of EUR above which the receipt will be printed.

section *Accounting*

- **Split payment under Polish law** – parameter activating handling of the split payment functionality for company It is available if the PLN currency is selected.
- **Register compensations** – allows the registration of compensation documents in the company. **More information …**
- **Compliance with French VAT Law** parameter available if the VAT rate selected is: Selecting the parameter brings a number of functional changes in the system, resulting from the adaptation of the system to the requirements of the French VAT law:
    - *Retail sales blockade* – it blocks, among others, the handling of receipts and their corrections, printing invoices on a receipt printer, or the

handling of sales and advance invoices and their corrections if no customer TIN is given in a document. Detailed description:

- *Keeping a record of special events* – the system logs events specified by the law in order to track the operational consistency of the system and data integrity.
- *Digital signature verification* – the functionality is available for invoices, receipts, duplicate receipts, special events, Grand Total Period reports, and archives is available from the level of *Configuration → Tools → Digital Signature Verification.*
- *Printout history* – handling of the functionality of identifying duplicates of receipts printed on POS workstations.
- *Grand Total Reports* – handling of the list of reports generated on POS workstation available in menu *Sales → Grand Totals (Tax Files).* In the field Archive Folder located under the parameter *Compliance with French VAT Law,* t is possible to choose a drive location where tax files will be saved.

section *Fixed Assets*

- *360 days in a year for straight-line method* – if the parameter is active and depreciation begins in the course of a month, write-offs will be generated proportionally to the number of depreciation days during the given month. If the parameter is not selected, depreciation write-offs will be calculated for the entire month.
- *Round-off amount added last month* – if this parameter is selected, write-offs for particular months are calculated in such a way that they are equal, while the remaining pennies are included in the write-off for the

last month of the accounting/calendar period. If the parameter is not selected, pennies are kept as part of the write-off for a month, for which they have been calculated.

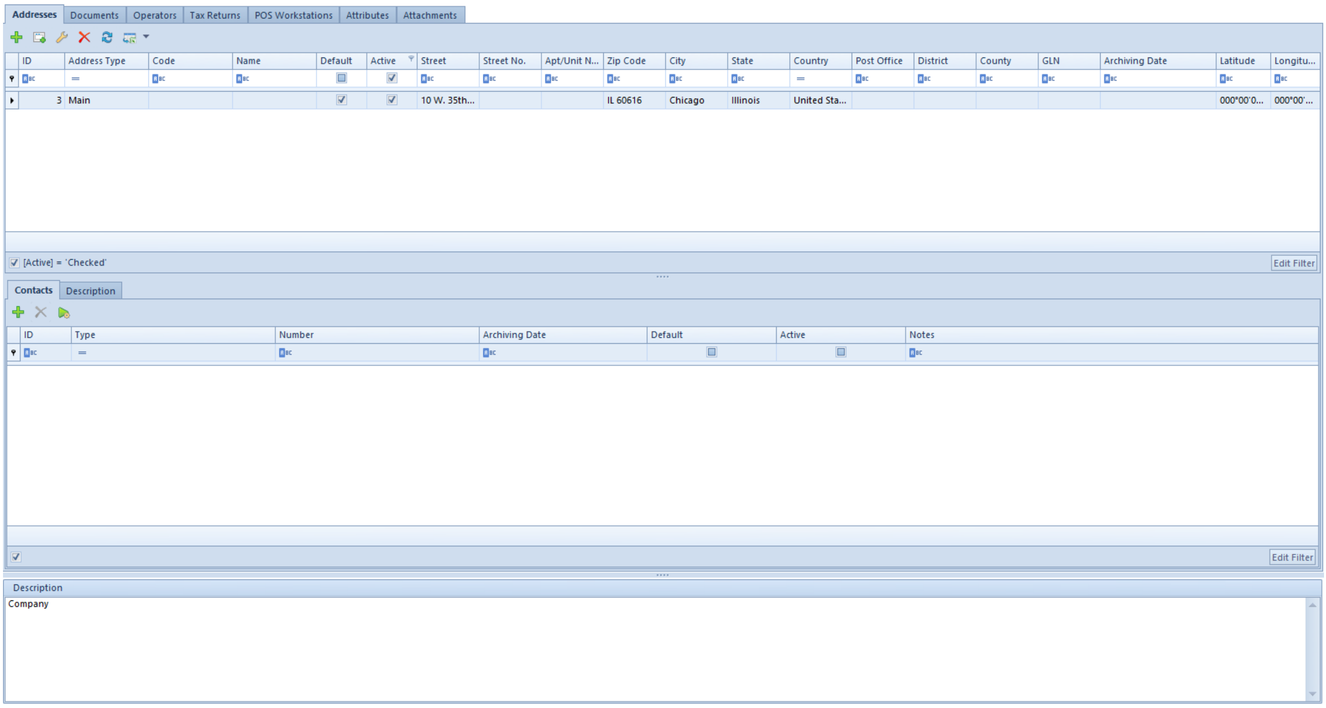
In the menu, there are standard buttons allowing for saving and closing the form, as well as [**Objects Availability**] button which allows for managing objects within a given company. More information regarding the functionality can be found in article Objects availability.

The other buttons available in the menu differ in dependence of selected form tab.

Tab *Addresses*

Tab *Addresses* contains information referring to addresses defined for a given company. A user can add, delete and edit addresses as well as contacts assigned to them.

Note
The tab is available for centers of *Company* type only. In centers of *Center* type, there is a tab *Address* which presents the address of a center being edited, and another tab *Company*, which presents address details of a company a given center is attached to.


Company form – tab Addresses

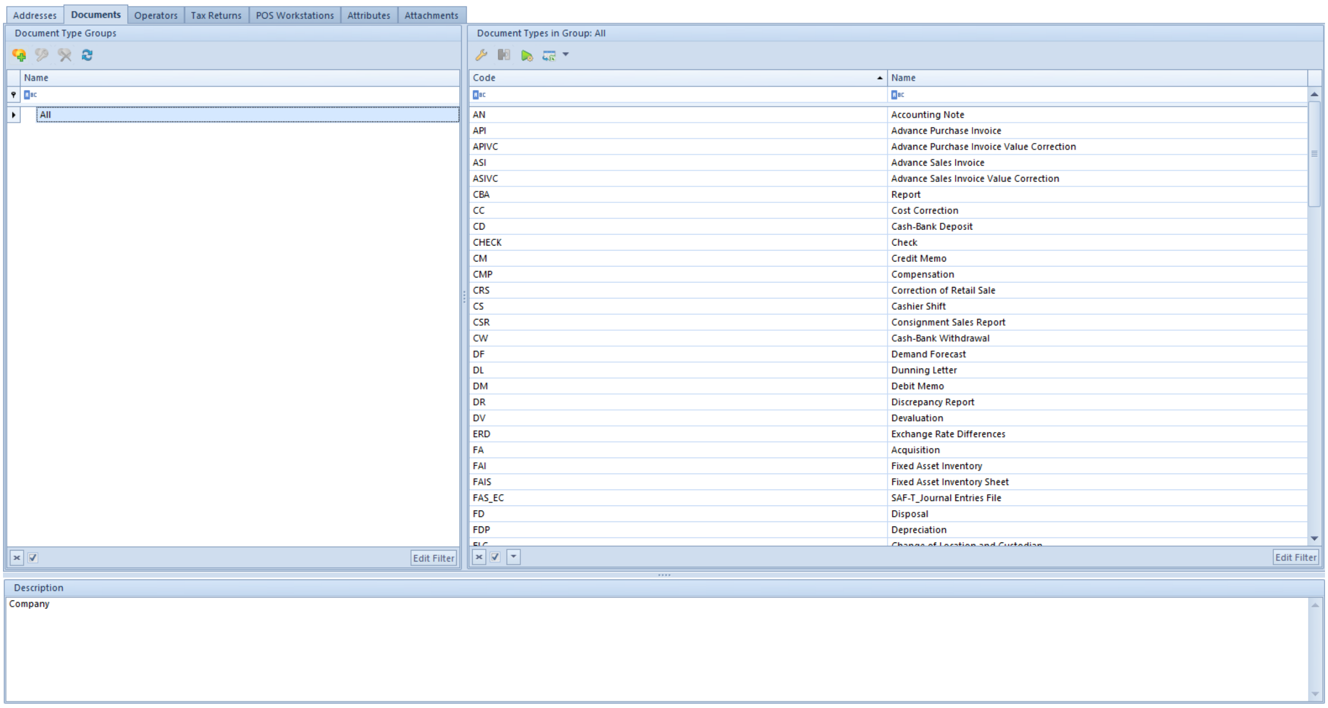
In the upper section of the window, there is a list of defined addresses and in the columns, data referring to its address and parameters determining whether a given address is active or default, are presented. For a newly added address, the parameter *Active* is checked by default. Unchecking it makes a given address an archival address, e.g., it cannot be selected in a document.

Example
In the system, a document including a specific center address was issued. Then, the user has updated the postal code of the center. In such case, an archival copy of the previous address is created and the address is replaced with the current address. After unchecking the filtering parameter in Active column on the list, in the column Archiving Date the
In the middle section of the window, there is a list of contacts assigned to an address selected in the upper part and *Description* tab. A user can add the following contact types: *Phone No.*, *Private Phone No.*, *Office Phone No.*, *E-mail*, *Fax*, *Messenger: GG*, *Messenger: Skype*. For each contact type it is possible to define only one default contact. It is not possible to deactivate a default contact type. A date since

when the contact is no longer active appears in column *Archiving Date.*

Tab *Documents*

Tab Documents allows for editing the document types and its layout is the same as window available upon selecting *Configuration → Documents → Types.* However, from the level of the structure center edit form, the user has more possibilities referring to document configuration. With the use of [**Attach to Group**] button it is possible to assign particular types of documents to selected group of documents.



Tab Documents on the form of the main company

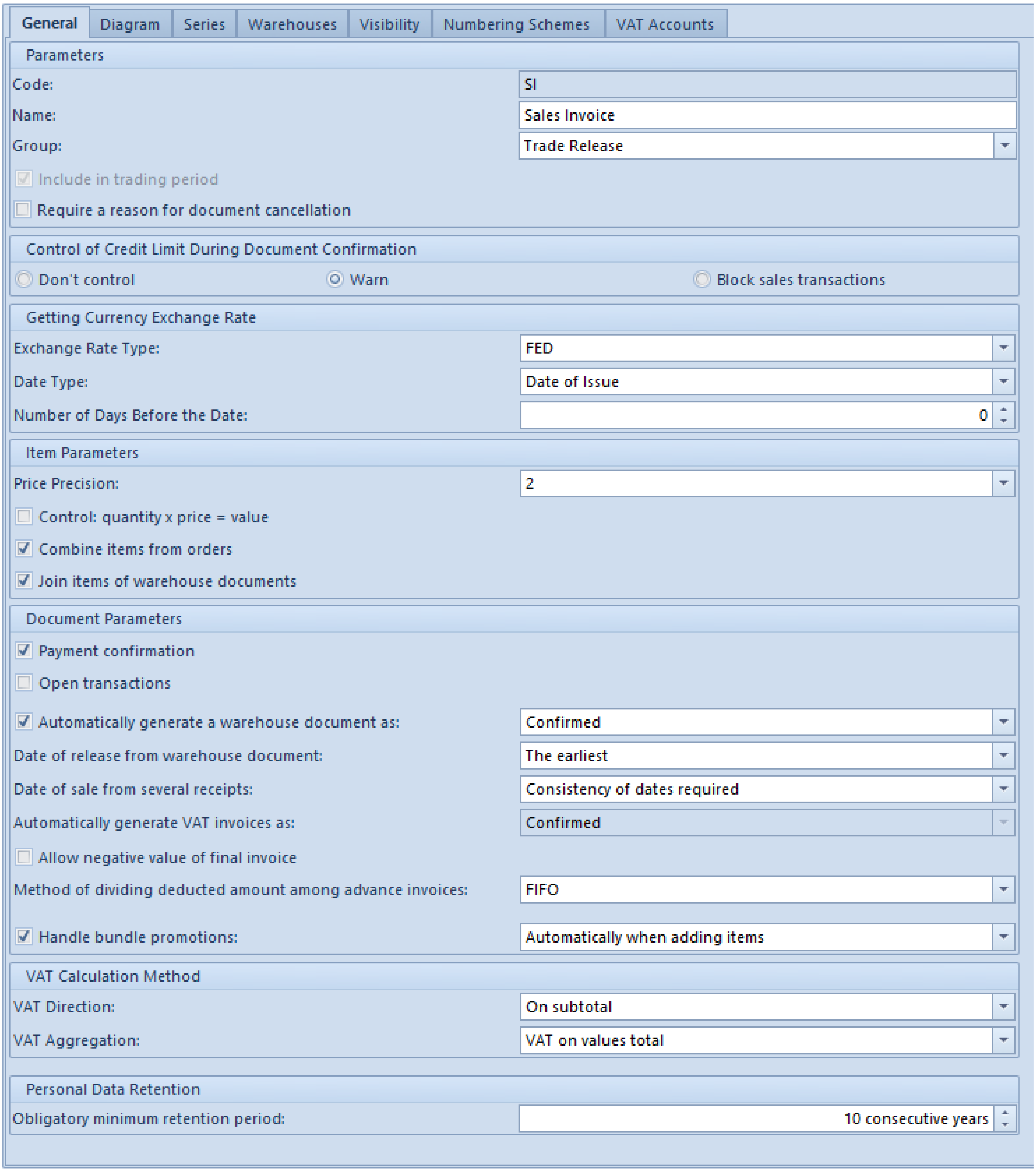
In addition to the possibility of assigning document types do groups created by the user, it is also possible to determine the visibility of document groups in a given structure cent. When editing a document group, upon clicking [Attach] in panel Visibility, it is possible to indicate structure centers in which all documents included in that group are to be visible. Button [**Detach**] allows for performing the opposite operation.

Because the document types are described in this manual in chapter *Document types*, here you will find the description of the additional tabs and fields which are available when editing a given document type

Below, are described additional tabs and fields in addition of a given document type, which are not available in the document configuration performed from the level of *Configuration → Documents → Types.*

Tab *General*

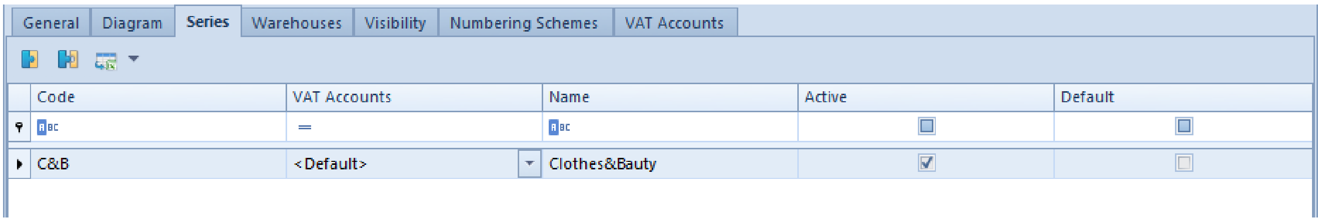
In *General* tab of edited document type, there are basic information about a document type provided as well as additional parameters referring to configuration of the type within a given center, which concerns, among other, control of credit limit, retrieving of exchange rates, price precision, generating of warehouse documents or VAT calculation method.



SI document form on company edition form

Tab *Series*

After adding a series do edited document type, it is contained in a document numerator (provided that the numerator includes element *Document Series*).



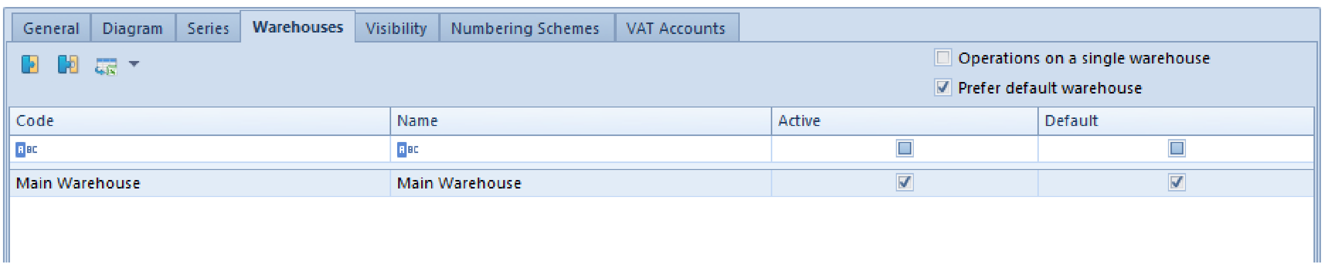
Tab series on the form of document type

In order to attach a series to a document type, click on the button [**Attach**] and select proper series available within a given center from the opened list. For a series to be available on the list, it must first be added to the center from the level of *Object Availability* panel. To detach a series, mark it on the list and click on the button [**Detach**]. When creating a new document, there will be series available which are included in this tab and have parameter *Active* checked. The series with parameter *Default* checked will be selected, by default.

From the level of this tab, it is possible to associate a document numeration series with selected VAT account.

Tab *Warehouses*

For some types of trade/warehouse documents it is possible to attach warehouses defined in the system. Owing to that, when issuing a new document, a user can decide, e.g., from which warehouse items added onto a document are to be collected.



Tab Warehouses on the form of company type

In order to attach a warehouse to a document type, click on the button [**Attach**] and select proper warehouse available within a given center from the opened list. For a warehouse to be available on the list, it must first be added to a center from the level of *Object Availability* panel. To detach a warehouse, mark it on the list and click on the button [**Detach**]. When creating a new document, there will be warehouses available which are included in this tab and have parameter *Active* checked. The warehouse with parameter *Default* checked will be selected, by default.

Note
Only warehouses of *Local* and *Consignment* type can be attached to document types. However, IQC and IO documents constitute an exception, because for them it is possible to attach also a warehouse of *Distant* type. Owing to that, it is possible to create an item quantity calculation or an internal order for subsidiaries (distant centers) attached to a company. Moreover, for IQC document it is possible to check several warehouses as *Default*. This way, these warehouses will be automatically added onto item quantity calculation.

In *Warehouses* tab, the following parameters are also available:

- **Operations on one warehouse** – if checked, then when issuing trade documents, it will be possible to add an item only from one warehouse (checked as *Default*).
- **Prefer default warehouse** – if checked, then when adding items to documents, items from the default warehouse are collected first, according to the selected queue method (FIFO, LIFO) and only then items from the other warehouses, also according to the selected queue method, are collected. The parameter affects only trade documents, because operations made on warehouse documents always concern only one warehouse. This parameter is checked automatically if parameter *Operations on one warehouse* is checked

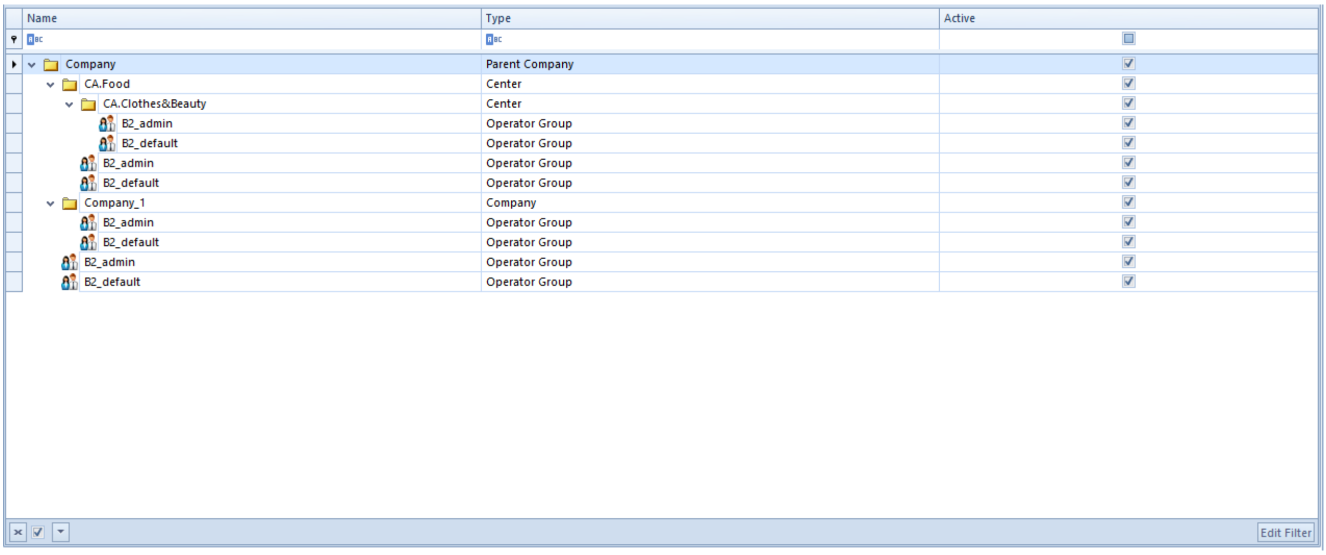
Tab *Visibility*

List of documents in particular centers of company structure may differ and not all documents are visible in all centers.

The visibility of documents in particular centers is determined by the user, however, the following rules must be observed:

- A document issued by a given center is visible for all the parent centers in a given branch of the structure
- A document issued by a given center is invisible for all the child centers in a given branch which are equal to one another

Example



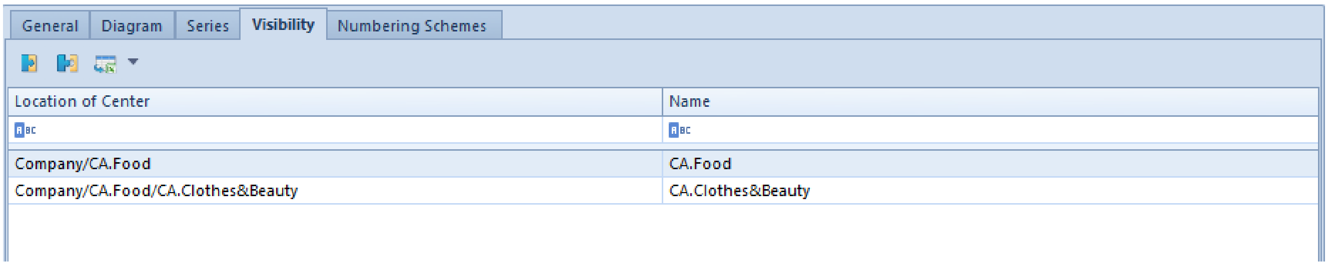
Exemplary company structure

The center *Company* sees all the documents issued in that center and all those which were issued by all its child centers.

The local center *Accounting* sees those documents which were issued in that center. However, it does not see documents issued in the center *Shoes4UOU* and *Main Company*. Moreover, it does not see documents issued in other local centers, that is *Management* and *Warehouse* because they are equal to each other.

The center *of Company* type *Shoes4You_DE* only those documents issued in that center of this structure. However, it does not see documents issued in the center *Main Company* and other companies, that is *Shoes4You* and *Shoes4You Accessories* (equal to each other) and in their child centers.

For each document type, it is possible to specify the centers of the same level, child centers and those assigned to another branch of the structure for which the documents must be visible (even though the above-specified rights do not say so). The rule, stating that if a document is visible for a given center, it is also visible for all the parent centers, still applies.



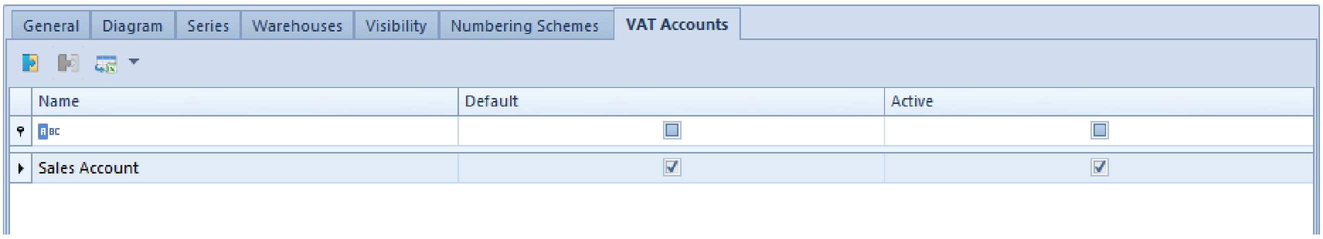
Tab Visibility on the form of company type

With the use of the button [**Attach**]it is possible to select from the list of company structure a center in which a given document should be visible. In order to remove the visibility of the document from a given center, it is necessary to mark it on the list and click on the button [**Detach**].

Example
The user logged in to the center *Main Company* attaches the local center *Management* in the tab *Visibility.* This means that a user logged in to the center *Management* will be able to preview all the documents (of a given type) issued in the center *Main Company*.

VAT Accounts tab

From the level of this tab, it is possible to assign many VAT accounts and select the default VAT account for a given type of document.



Tab Vat Accounts on the form of SI document type

In order to attach VAT accounts, click on the button [**Attach**] and select an account from the opened list of VAT accounts. To detach an account, mark it on the list and click [**Detach**]. It is also possible to determine which account should be default for a given document type by checking the parameter *Default*. More information can be found here.

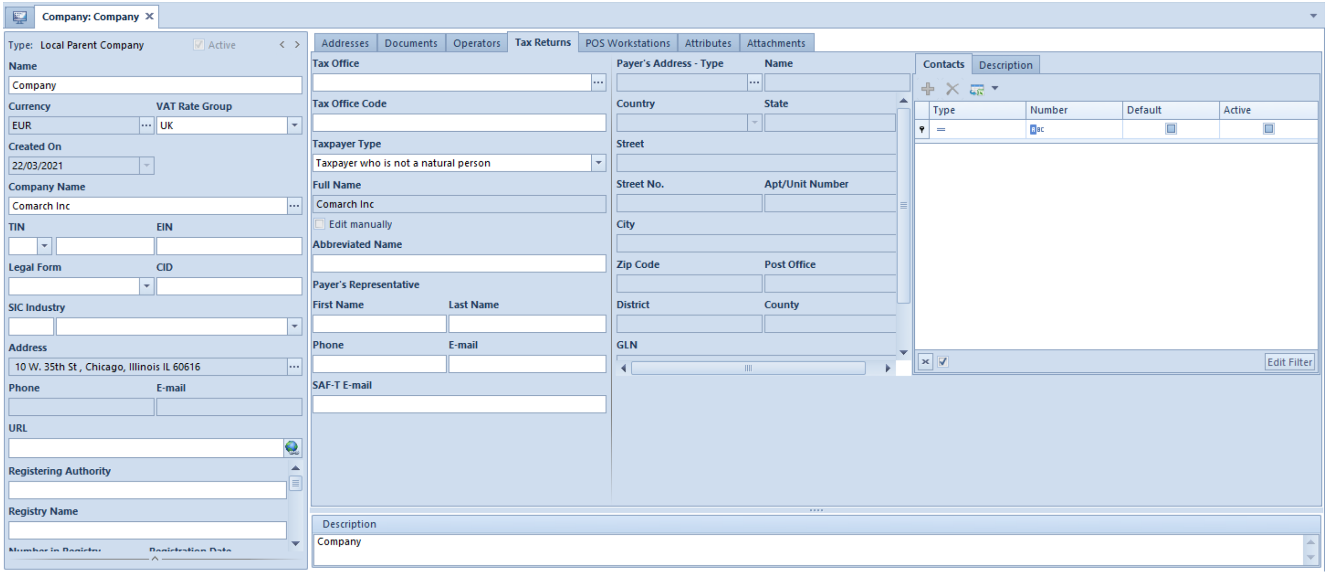
Tab *Operators*

Information regardin this tab can be found here.

Tab *Tax Returns*

This tab *Tax Returns* allows entering information necessary to submit a tax return.

Note
The tab *Tax Returns* is available only in the case of editing the parent company or a center of the *Company* type.
The layout of this tab changes depending on type of payer selected in field *Taxpayer Type*.



Tab Tax returns for a taxpayer not being a natural person

Available fields:

- **Tax Office** – name of the tax office which will be assigned to a company. Button […] opens the list of offices defined in the system.
- **Tax Office Code** – field completed automatically upon selecting an appropriate office or can be filled in manually.
- **Taxpayer Type** – drop-down list with the following options:
- *Natural person* – opens additional fields which should be completed: *First Name*, *Last Name*, *Date of Birth* and *Nin*
- *Taxpayer who Is not a natural person*
- **Full Name** – field filled in automatically with the company name retrieved from the company header. Upon selecting *Edit manually* option, it is possible to change data.
- **Abbreviated name** – abbreviation of company's name

In *Payer's Representative* section, it is possible to specify the following data referring to a person representing a company, such as: *First Name*, *Last Name*, *Phone*, and *E-mail*.

- **SAF-T e-mail** – indicated e-mail address will be automatically added to SAF-T file form

Data regarding taxpayer's address, in the middle section of the tab, is retrieved with the use of the button […] available in the *Payer's Address – Type* field, which opens a window with the list of addresses defined in the system.

Tab *POS Workstations*

In this tab it is possible to add points of sale attached to the center in which the user is currently working. From the level of this tab, it is also possible to define a new POS workstation. Detailed information about parameters available in this tab as well as instruction on how to add points of sale can be found here.

Tab *Attributes*

This tab allows for attaching an attribute to a structure center according to the rules described here.

Tab *Attachments*

This tab allows for attaching an attachment to a structure center according to the rules described here.