cairo.ERP

Sale documents - Assignments (DD)

How to reconvert an Assignment (DD)?

This article explains how to reconvert an **Assignment (DD)** in the ERP system if you need to correct the source document (e.g., an **Invoice (FV)** or **Receipt (PG)**) from which it was created. This process requires deleting the existing document, correcting the assignment, and then reconverting it.

When should you reconvert an Assignment?

If documents such as an **Invoice (FV)** or **Receipt (PG)** were created from an **Assignment (DD)** and require correction, you can't edit them directly. In such a situation, you must delete the converted document, make changes to the source assignment, and then reconvert it.

Important:

- If the **Invoice (FV)** or **Receipt (PG)** was linked to a **cash document**, you must delete that cash document first.
- If the **Receipt (PG)** created from the assignment note conversion has already been **fiscalized**, you cannot modify it. In this case, you must process a return for the receipt, issue the assignment note again, and then reconvert it.

Steps for Reconverting an Assignment

Follow these steps to reconvert an assignment:

1. **Delete the converted document.**
   - Go to: **ERP** > **SALES** > **INVOICES / RECEIPTS**.
   - Select the document you want to delete and press **[Del]**.
   - Choose the **DELETE FROM LIST** option.
   - The system will inform you that the document was converted from an assignment (DD) or a list of assignment (in the case of a DD list, more DD documents will appear).

   > After deleting the converted documents, each assignment that was converted will require re-approval and a change in its conversion flag. Converted assignments can

> also be checked before deleting the document from the header **[F10]**.

2. **Change the Invoice (FV) / Receipt (PG) numbering (optional).** If you want to maintain the existing document numbering, you must change it:
   - Go to: **ERP** > **SALES** > **INVOICES / RECEIPTS**.
   - Select **[→]** > **ADMINISTRATOR** > **SERVICE FUNCTIONS** > **DOCUMENT NUMBER SETTINGS**.
   - In the **NUMBER** field, enter a value that is 1 less than the next document to be created.
3. **Re-approve the Assignment (DD).**
   - Go to: **ERP** > **SALES** > **ASSIGNMENT**.
   - Select the assignment (list of assignment) you want to re-approve and press **[F4]** (DD re-approval).
4. **Remove the Assignment (DD) conversion flag.**
   - Select the desired assignment
   - Press the **[Shift]** + **[F9]** combination.
   - Select the **CONVERSION DIRECTION – delete** option.
5. **Correct the Assignment (DD) and reconvert it.** After performing the above steps on all assignment from which the conversion was previously made, you can make the necessary corrections to the **Assignment (DD)**, and then reconvert them to create a new **Invoice (FV)** or **Receipt (PG)**.

This process ensures proper document correction while maintaining data consistency within the system.

Sale documents - Reservations (RE)

How does the minimum order value work?

This article explains how advanced minimum order value control works in cairo.ERP systems, including summing order values within a day and route.

New approach to minimum order value control

Advanced minimum order value control has been introduced in the cairo.ERP system. Previously, each order was controlled independently. Now, it's possible to sum order values within the same day and route. This means you can add more products to an order, even if a single subsequent order doesn't exceed the set minimum, provided that the total value of placed orders already exceeds it. This control works in ERP, API/Webservice.

Activation and configuration

To configure the minimum order value, go to: **ERP > ADMINISTRATION > PARAMETERS > COMMERCIAL DOCUMENTS > MINIMUM RESERVATION VALUE**

Available parameters are:

- **ACTIVE**: Enables or disables minimum reservation value control (**NO / YES**).
- **MINIMUM NET RESERVATION VALUE**: The minimum reservation value, set in the system currency.
- **CONTROL MODE**: Defines how the minimum reservation value will be controlled:
    - **current reservation**: Verifies only the value of the currently processed order.
    - **blocked reservations + route assignments**: Verifies the current reservation plus the value of blocked or remotely ordered reservations, as well as consignments from the current day – all from the current warehouse and route.

Settings per contractor

You can also configure the minimum order value individually for each contractor:

ERP > CONTRACTORS > [Enter] > TRADE TERMS

- **MINIMUM NET RESERVATION VALUE**: Minimum net reservation value, set in the system currency. A value of **0** means that the general parameter will be applied, i.e., the settings from **ERP > ADMINISTRATION > PARAMETERS > SCOMMERCIAL DOCUMENTS > MINIMUM RESERVATION VALUE**.

System operation

Verification of the order: When setting the **OK** status on a reservation, the system checks whether the value of blocked items on the reservation (including potentially available items, e.g., with virtual quantity), along with optionally other customer documents (according to parameters), is higher than the established minimum.

- **First order vs. additional orders**: The first order of a given day must exceed the set limit. Subsequent additional orders are possible regardless of their individual value. An order below the minimum value should not be created.
- **Route and date verification**: If the parameter is set to **RE blocked + DD**, the system checks whether other reservations and consignments are assigned to the same route. Additionally, for consignments, the same date is verified, while reservations can be from a different day.
- **API/Webservice (doOrderProduct)**: If the client has a defined minimum reservation value threshold, before creating a reservation in the **doOrderProduct** function, the system verifies the value of ordered goods (considering virtual quantities), similarly to **doOrderClose**. If it fails, a log is generated: **"msg": "Reservation value below the minimum required net value".** Additional logs are saved in the **check_min_wart.log** file.
- **Order fulfillment**: If the values comply with the requirements, the reservation receives the **OK** status and the order is fulfilled. Otherwise, an error message appears.

Purchase documents - Purchases (PZ)

How to correct values on a confirmed purchase document (PZ)?

This article explains how to correct values on a purchase document that has already been confirmed. The procedure differs depending on whether you are using the **weighted average** or **FIFO** valuation method, and whether the item is still in stock or has already been issued.

Weighted Average Valuation Method

If you are using the weighted average valuation method, there are two main situations:

1. Item is in stock or partially issued

In this situation, you can correct the purchase document directly. The value difference will be reflected in the current item stock.

- Open **ERP** > **Purchases** > **Purchases**.
- Go to **confirmed documents [F2]**.
- Select the header of the incorrect document and **unconfirm it [F4]**.
- Enter the document **[Enter]**.
- **Delete** the incorrectly entered item **[Del]**.
- **Add the correct item [End]**.
- **Reprint the document [Tab]** to transfer it to receivables/payables.
- **Confirm** the document **[F4]**.

2. Item is completely issued

Directly correcting the purchase document (as in point 1) would leave a value difference on an empty item card, which would only be accounted for in the next receipt. To avoid this and correctly settle the difference, you must issue an internal purchase correction document. As a result, the difference will go into deviations in the warehouse, and the item card will have a zero inventory value.

- Go to **ERP** > **Purchases** > **Purchase Corrections**.
- Press the **[End]** key and **select the document to be corrected** from the list.

- **Indicate the item** that was incorrectly entered, providing the correct quantity and price in the "should be" field.
- **Reprint the document [Tab]** to transfer it to receivables/payables.
- **Confirm** the document **[F4]**.

> You can enter the correction internally in the ERP system, even if you do not have a physical correction document from the supplier.

FIFO Valuation Method

If you are using the FIFO valuation method, there are also two main situations:

1. Item from that batch is in stock

When an item from a specific batch is still in stock, you can correct the purchase document as follows:

- Open **ERP** > **Purchases** > **Purchases**.
- Go to **confirmed documents [F2]**.
- Select the header of the incorrect document and **unconfirm it [F4]**.
- Enter the document **[Enter]**.
- **Delete** the incorrectly entered item **[Del]**.
- **Add the correct item [End]**.
- **Reprint the document [Tab]** to transfer it to receivables/payables.
- **Confirm** the document **[F4]**.

2. Item is partially or completely issued

If an item from a specific batch has been partially or completely issued, a purchase correction must be issued. This will result in the difference in the issued value being included in the deviations on the document. Items from this batch that are still in the warehouse will be removed by a stock correction document (K+) and entered at the new price. The K+ document is already confirmed.

- Go to **ERP** > **Purchases** > **Purchase Corrections**.
- Press the **End** key, **select the contractor and the document to be corrected** from the list.
- As the **operation type**, select **(K) -** "**Price Correction**".
- **Indicate the item** that was incorrectly entered, providing the correct quantity and price in the "should be" field.
- **Submit for receivables/payables**.
- **Confirm** the document.

> In case of an error on a purchase correction for the FIFO method, remember to **cancel the K+ document**.

Correcting a purchase document in a logistics warehouse

The method of correction in a logistics warehouse depends on the item's status:

- If the item **has not yet been moved from receipt**, you can **delete the incorrect item** from the purchase document and enter the correct one, following the steps above.
- If the item **has already been allocated** (even a single unit) in the warehouse, the correction must be performed via a **purchase correction document**.

KSeF & e-Invoices

What is KSeF and How to Use it in the cairo.ERP System?

The National e-Invoicing System (KSeF) is a central database managed by the Ministry of Finance, to which companies are obligated to submit information about their sales (invoices, returns). This article explains how KSeF is integrated with the cairo.ERP system and how to configure it for use.

What is KSeF?

KSeF is an ICT system used for issuing and receiving structured invoices. Its main goal is to digitize and automate invoicing processes in Poland. More information can be found on the official KSeF website: https://ksef.mf.gov.pl/.

Key Aspects of KSeF for Companies

The implementation of KSeF involves several important aspects to consider:

- **Definition of a structured invoice:** KSeF exclusively concerns structured invoices, meaning those issued and received through the Ministry of Finance's system.
- **Mandatory implementation:** Eventually, the KSeF system will become mandatory for all entrepreneurs. Exceptions may include invoices issued to natural persons not conducting business activities (consumer invoices) or **simplified invoices (e.g., receipts with NIP up to PLN 450)**.
- **Invoice signing:** Invoices in KSeF must be authorized by one of the following methods: qualified electronic signature, electronic seal, or KSeF token.
- **Invoice statuses:** The system allows tracking the statuses of sent and received invoices (e.g., delivered, rejected).
- **Compliance with regulations:** KSeF ensures compliance with current tax law regulations.

Benefits of KSeF Implementation

Implementing the National e-Invoicing System brings a number of benefits for entrepreneurs:

- **Faster invoice issuance and receipt:** The invoicing process becomes more efficient.
- **Increased data security:** A central database enhances the security of stored information.
- **Simplification of accounting and control processes:** Automation facilitates document management.
- **Possibility of process automation:** Invoicing-related processes can be largely automated.
- **Easier access to invoices and their archiving:** All invoices are available in one place and easy to archive.
- **Reduced VAT refund time:** For active VAT taxpayers, the refund period can be shortened from 60 to 40 days.

How does KSeF integration with cairo.ERP work?

In the cairo.ERP system, integration with KSeF is achieved through two independent modules:

- **cairo.ERP:** Responsible for generating documents and sending data to the cairo.KSEF WS module.
- **cairo.KSEF WS:** This is a web service that receives data from cairo.ERP (or another ERP system) and processes it into the appropriate KSeF format (compliant with the XSD schema).

The introduction of the KSeF module to cairo.ERP necessitated a change in the document approval logic. Approval now takes place before printing, right after selecting the payment method.

Abbreviated Scheme for Sending Documents to KSeF from cairo.ERP

Below is the sequence of steps when sending a document to KSeF:

1. **Print document:** Start the process by printing the document in cairo.ERP (using the TAB key).
2. **Define data:** Set print data, payment method, etc.
3. **KSeF validation:** The system performs KSeF validation. If validation fails, you will return to step 2.
4. **Approve cairo.ERP document:** After successful validation, the document is approved in cairo.ERP.
5. **Send to KSeF:** The document is sent to KSeF. After this stage, the document cannot be recreated.
6. **Print document:** The final document print occurs.

A document that has not been sent receives an **"awaiting"** status. You can view it in the appropriate cairo.ERP window, check the reason for non-delivery, resend it, or examine its structure.

KSeF Implementation and Configuration in cairo.ERP

To implement and configure the KSeF module in cairo.ERP, the following parameters must be completed in ERP > ADMINISTRATION > PARAMETERS > KSEF > PARAMETERS:

- **STATUS (ACTIVE)** - This field indicates whether the KSeF module is active in your cairo.ERP system. When active, the system will attempt to send invoices to KSeF according to the configuration.
- **cairo.KSEF WS ADDRESS** - In this field, you need to enter the **address of the cairo.KSEF WS** (Web Service) server. This is the address where your cairo.ERP system will communicate with the intermediary module responsible for data conversion and sending to KSeF. To obtain it, contact the Helpdesk (+48 89 533 95 07).
- **AUTHORIZATION CODE** - This field is used to generate and manage the **authorization token**, which is essential for secure communication between your cairo.ERP system and the cairo.KSEF WS module. Clicking this field generates a unique private key, which is then used to authenticate connections. The company's identity is encoded using this key.
- **CONNECTION TEST** - This option allows for a quick check to see if the configuration is correct and if the cairo.ERP system can establish a connection with the cairo.KSEF WS module. After clicking, the system will attempt to send a test query, and you will receive feedback on the connection status. This is a crucial step after any configuration change to ensure everything is working correctly.

> Full implementation should occur well in advance of the planned KSeF start date.

How to Generate a New cairo.KSEF WS Token?

The token currently has no time limit, so there's usually no need to generate a new one. However, if security reasons require it, you can do so as follows:

1. **Contact Helpdesk** (+48 89 533 95 07); we will remove the previous token.
2. **Generate a new key.** Generate the key again in cairo.ERP, as described in the "Generating a token and testing the connection in cairo.ERP" section.
3. **Restart Falcons.** A restart of Falcons is required for the changes to take effect.

What Data Does the Client Need to Provide for ksef.ini Configuration?

For us to correctly configure communication for your company, please prepare and provide the following information:

- **Company NIP (Tax Identification Number):** This is your company's primary identifier in the KSeF system.
- **KSeF Host Address:** Please indicate which KSeF environment you wish to work on:
  - **Test:** For testing purposes, with no impact on real settlements.
  - **Pre-production (Demo):** An environment similar to production, also for testing, but already requiring real authentication data.
  - **Production:** The environment for sending actual invoices.
- **KSeF Token:** You must generate this token yourself on the official Ministry of Finance KSeF portal. This key is essential for authorizing communication with KSeF.
- **Preferences regarding KSeF session mode:**
  - **Immediate UPO (Official Receipt Confirmation):** Each document sent will generate a separate session, and the UPO will be available almost immediately.
  - **Batch UPO:** The system will use one session lasting up to 2 hours, and the batch UPO will be available with a delay (after approximately 4 hours). This mode is often recommended for larger companies due to performance.

Please provide this data to allow us to quickly and correctly launch KSeF integration in your system.

> In the test and pre-production KSeF environments, **anonymized data** should be used. This data should not contain real accounting information. Although the pre-production environment operates similarly to the production environment and requires real authentication data, it is always recommended to use test data to avoid accidentally entering actual accounting data into non-production environments.

Products and services

How does the new product search engine work?

The new product search engine is an improved tool designed to **make finding products easier and faster**, helping you save time and work more efficiently. To start using it, please **contact the Helpdesk** for activation (+48 89 533 95 07). Below you'll find information on how to use it.

First Launch and Settings

When you first access one of the supported views, the system will ask whether you want to use the new search engine.

- If you choose the old search engine, the question will reappear every 3 days until you decide to switch.
- If you choose the new search engine, the system will no longer ask.
- You can change your search preferences at any time through the option available within the view **[->] - SEARCH SETTINGS**.
- The preferred search mode (1 - new, 2 - old) and the date of the last prompt are saved individually for each operator.

Where is the new search engine available?

The new search engine is available in the following views:

- **Warehouse**
- **Product/service selection for documents**
- **Product/service catalog**

The new search engine is **not available** in the **STOCK AS OF DATE** view.

How the new search engine works

- **Column-based search**: Search is performed within the selected column, e.g., product/service **reference** or **name**.
- **Word order**: The order of words entered doesn’t matter. Words are separated by spaces.
- **Special characters**: Special characters are removed, except for the “+” symbol, which allows searches for specific cases like batteries (e.g., "P+").
- **Phrase weighting**: Results are ranked by relevance.
  - If the full entered phrase is found, it will appear at the top of the result list.
  - Whole-word matches are weighted more heavily than partial matches.
- **Selection list [Ctrl+P]**: The new search engine fully supports searches within selection lists.
- **Minimum character count**: At least **3 characters** are required to begin searching. This value can be changed. However, please note that lowering it may significantly slow down the system. For large companies with an extensive database, it's also possible to increase the minimum number of characters to improve performance. If you want to change the minimum number of characters, please contact the Helpdesk.
- **Result limit**: The maximum number of displayed results is **5000**.

Customers

How to add a new contractor?

In the ERP system, you have two main methods for adding contractors: manual data entry or automatic retrieval from GUS.

Adding a new contractor

To add a new contractor, follow these steps:

1. Go to: **ERP** > **CONTRACTORS**.
2. A list of contractors will appear on the screen, sorted by name abbreviation.
3. Press the **End** key.
4. At this point, you have two options for adding a contractor:
   - **Manual contractor entry:** Enter the data manually.
   - **Retrieve data from GUS:** Enter the NIP (or KRS, REGON) number, and the system will automatically populate basic information from the Central Statistical Office (GUS) database.
5. After entering or retrieving the data, save it.

Defining fields for editing, copying, or as required

You can define which data should be editable, copyable, or required. You have two options for this:

- **From administration level:** Go to: **ERP** > **ADMINISTRATION** > **PARAMETERS** > **CONTRACTORS CATALOG** > **CONTRACTOR DATA EDITING**.
- **From the contractor card level:** Go to **ERP** > **CONTRACTORS**, select a contractor and press **Enter**, then use the key combination **Shift+F12**.

Printing

How to add and configure fiscal and document printers?

This article provides instructions on adding and configuring fiscal and document printers using the cairo.DESK application and the cairo.ERP system. You will also find solutions to common problems that may occur during printer setup and use.

Adding a fiscal or document printer

To add a printer, you need to configure it in both the cairo.DESK application and the cairo.ERP system.

cairo.DESK Configuration (latest version)

1. Download cairo.DESK from our website: **https://www.cairo.pl/en/instructions/**
2. Open **cairo.DESK**.
3. Go to **Ustawienia** > **Desk Webservice**.
4. Enter the data:
   - **Host**: Received from our service.
   - **Kod autentyfikacji**: Available in ERP (**ERP > ADMINISTRATION > PARAMETERS > POSITION> GENERAL PARAMETERS**). If not visible, contact our service.

Fiscal Printer Configuration

Configuration in ERP

1. Go to **ERP > ADMINISTRATION > PARAMETERS > POSITION> FISCAL PRINTER**.
2. Fill in the fields:
   - **WORKSTATION**: Identifier of the workstation being configured.
   - **STATUS**: Enable fiscal printer support on the workstation.
   - **PRINTER ID**: Unique identifier for the fiscal printer.
   - **PRINTER MODEL**: Select **cairo.DESK**.
   - **FISCAL PRINTER IP NUMBER**: Not required when **cairo.DESK** is selected.

- **NIP PRINT SUPPORT**: Specify whether to set the NIP flag on the receipt (only for printers supporting NIP printing).
- **WAREHOUSE LIST**: Select the warehouses where the printer should be available.
- **MAXIMUM ITEM NAME LENGTH**: For **cairo.DESK**, enter **39 characters**.

Configuration in cairo.DESK

1. Open **cairo.DESK**.
2. Go to **Ustawienia** > **Drukarka fiskalna**.
3. Check the **Status Aktywny** option.
4. Supported fiscal printer models are:
   - NOVITUS
   - POSNET (POSNET Thermal is not supported)
   - ELZAB
   - EMAR
5. Go to **Ustawienia** and configure **Typ połączenia**:
   - **COM (cable connection)**: Select the **COM Port** to which the printer is connected.
   - **LAN (network connection)**: Enter the printer's **IP** and **Port** (e.g., 6666).
6. Select **Zapisz**, then **OK** for the application to restart. If the connection is successful, a "ready" status will be checked.
7. Go to **Stanowiska** > **Dodaj**.
8. Enter **Id stanowiska** (e.g., fslinux001). Leave the **Drukarka** field blank.

Document Printer Configuration

Remember that the physical printer where the printout is to go must already be configured in Windows, and printouts from Windows should work correctly.

Configuration in ERP

1. Go to **ERP > ADMINISTRATION > PARAMETERS > SYSTEM > SYSTEM PRINTER LIST > [End]**.
2. Enter printer data:
   - **PRINTER NAME**: Custom printer name.
   - **PRINTER TYPE**: Select **cairo.DESK**.
   - **NETWORK ALIAS**: Printer network name (alias).
   - **DRIVER**: Not used with **cairo.DESK**.
   - **LINES PER PAGE**: Number of lines per page.
   - **LASER PRINTER**: Check if it's a laser printer.
   - **DUPLEX**: Check if the printer supports double-sided printing.
3. Add the printer to the workstation: Go to **ERP > ADMINISTRATION > PARAMETERS > WORKSTATION > WORKSTATION PRINTER LIST > [End]**.
4. Point to the newly added printer and select **LATIN-2**.

Configuration in cairo.DESK

1. Open **cairo.DESK**.
2. Go to **Stanowisko** > **Dodaj**.
3. Enter **Id stanowiska** (printer alias from ERP).
4. Select the **Drukarka** from the Windows system.

Ended support for older programs

Support for the following programs has ended. If you encounter problems, contact service or switch to cairo.DESK:

- **Fiscal printer**: flmenu, flfisk, fljfisk, serproxy (ELZAB FP-600, POSNET DF-300, EMAR EMAR-DUO)
- **Document printer**: D2W Print

Troubleshooting common errors

Document printers

Fiscal printers

Printing from ERP isn't working - what to check?

If you're encountering problems printing documents or labels from the ERP system, below are some steps you can check to resolve the most common causes.

Problems with cairo.DESK

- **"cairo.DESK - RPC server is unavailable"** This message usually means that the required .NET runtime environment is not installed.
  - **Solution:** Download and install the **.NET Runtime 8.0.6 (or newer)** file for Windows (Arm64 version, if applicable) from: **https://dotnet.microsoft.com/en-us/download/dotnet/8.0**. After installation, **restart your computer**.
- **cairo.DESK does not start or shuts down** This could be caused by a incorrectly named application file.
  - **Solution:** Check the path **C:\Users\Sklep\AppData\Local\Cairosoft**. If you find a cairo.DESK file with a long, incorrect name, **rename it to cairo.DESK.exe**.
- **"Cannot retrieve templates from c.DESK"** This error indicates a missing or incorrectly configured path to the templates.
  - **Solution:**
    - **Exchange folders:** Make sure you have exchange folders configured, e.g., **X:/wymiana/fslinuxXXX** (where XXX is the workstation number).
    - **Webservice connection:** In cairo.DESK, in the workstation settings, **add fslinuxXXX** (the appropriate workstation number) in the webservice connections section.
- **"Target client not connected"** This message indicates a missing specified print path for a given module and workstation.
  - **Solution:**
    - **Exchange folder:** Make sure the exchange folder path is correctly configured, e.g., **X:/csmag/[warehouse]/[module]/fslinuxXXX**.
    - **Webservice:** Check the webservice configuration, e.g., **/[warehouse]/[module]/fslinuxXXX**.
- **"Error sending label to cairo.DESK / Error during printing: No application is associated with the specified file for this operation"** This means that Windows does not have a default application assigned to open PDF files.

    - **Solution:** Go to **Settings > Default apps > Choose default applications by file type** in Windows. **Assign a default application to PDF files** (e.g., Adobe Reader or Foxit Reader). We recommend Foxit Reader.
- **"DeskClient: Couldn’t find printer for station or is not available"** This error means that the printer has not been specified or is unavailable in cairo.DESK for the given workstation.
    - **Solution:** In cairo.DESK, at the workstation configuration level, **ensure that the printer is correctly specified and available**.

      > With older versions of cairo.DESK, a missing printer selection might cause the program to shut down when trying to print a label.
- **"Error sending label to cairo.DESK / Error during printing: No application associated with this operation for the specified file"** This means that Windows doesn't have a default application assigned to open PDF files.
    - **Solution:** Go to **Settings > Default apps > Choose default applications by file type** in Windows. Assign a default application for PDF files (such as Adobe Reader or Foxit Reader). We recommend Foxit Reader.

Receipt printing doesn’t work – what to check?

If you're having trouble printing receipts from your ERP system, there are a few common causes worth checking.

Fiscal printer problems

- **cairo.DESK does not see the fiscal printer:**
  - **Problem**: The "ready" status is not checked. This may mean:
    - The fiscal printer cable is unplugged.
    - The fiscal printer is not turned on.
    - Damaged printer.
    - Damaged printer cable.
    - Damaged port on the computer.
  - **Solution**: Check the above points.
- **cairo.DESK – receipt is not printing:**
  - Check the following:
    - If the item name on the receipt does not exceed 39 characters. If it exceeds, shorten the item name (from the general item data or from the receipt item level → **ITEM NAME CORRECTION**). It is also possible to fill in the fiscal item name if you do not want to change the main item name in the system.
    - If the item on the previous receipt was not printed with a different VAT rate.
    - If the item name does not contain special characters, such as "$", "&", etc.

How to add a graphic to a printout?

You can add a graphic to a specific print profile to appear on selected documents. Remember, the graphic won't print if you choose the "print to screen" option.

Graphics can be printed on the following document types:

- Invoice
- Receipt
- Consignment note
- Purchase Invoice

Printout types supporting graphics:

Graphics can be placed on printouts in the following scenarios:

- PDF printout for email
- e-Invoice printout
- Printout via cairo.DESK printer type

Graphics will not appear in the following cases:

- Issuing a DD to a route.
- Printing to screen.

Steps to add a graphic to a printout:

1. Start by saving the graphic in the "export" location.
2. Go to **ERP > ADMINISTRATION > PARAMETERS > COMMERCIAL DOCUMENTS**.
3. Select the document type, for example, **(FV) INVOICE**.
4. Go to **PRINT PROFILES**.
5. Place the cursor on the print profile you're interested in.

6. Press the **F6** key to add a picture.
7. Define the parameters:
    - **FILE NAME**: Specify the file.
    - **HEIGHT**: Set the graphic's height.
    - **NAME**: Enter the graphic's name.
    - **POSITION**: Specify the graphic's position on the printout (e.g., "header 1"). There are 8 places to choose from in the header and 3 places in the document footer.
    - **ALIGNMENT**: Choose the graphic's alignment (e.g., "left").
    - **IMAGE BELOW TEXT**: Select "no" if the graphic should be above the text.
8. Confirm the changes by selecting **SAVE**.

After completing these steps, the graphic will be added to the selected print profile and will be visible on printed documents.

Inventory

How to conduct inventory in cairo.ERP?

> This article explains how to perform inventory in **cairo.ERP**.
>
> For inventory procedures in **cairo.WMS**, see this article.

This article will help you conduct inventory in the cairo.ERP system, guiding you through each of the five key stages of the process.

Stages of inventory in cairo.ERP

The inventory process in cairo.ERP includes the following stages:

1. Opening inventory
2. Generating inventory sheets
3. Entering physical count data
4. Closing inventory
5. Generating post-inventory stock reports

---

1. Opening Inventory

Before starting inventory, you need to define the range of item cards and create a new inventory in the system.

- **Defining the Range of Item Cards** Inventory can cover **all warehouse item cards** or **selected item cards**. If the inventory concerns selected item cards, it is necessary to create a selection list in the target warehouse beforehand.

> Item cards included in the inventory are locked for warehouse operations.

- **Creating a New Inventory** To add a new inventory, go to: **ERP > ADMINISTRATION > INVENTORY > CURRENT**. Then press [END] and fill in the following data:
  - **WAREHOUSE**: Select the target warehouse.
  - **DATE**: Enter the inventory date.

    - **NAME**: Add an inventory description.
    - **RANGE OF GOODS**: Specify the range of items:
        - **ALL**: All warehouse item cards.
        - **RANDOM**: System-selected item cards.
        - **SELECTION LIST**: A predefined list of item cards.
    - Press [EXECUTE] to confirm.

    After opening the inventory, you can review its items by pressing [ENTER].

---

2. Generating Inventory Sheets

After opening the inventory, you can generate inventory count sheets.

- In the inventory item list (**ERP > ADMINISTRATION > INVENTORY > CURRENT > [ENTER]**), press [TAB].
- From the print list, select **INVENTORY SHEET**.
- Detailed print parameters are available by pressing [F1].

---

3. Entering Physical Count Data

After printing the sheets, conduct a physical count of the goods, then enter the collected data into the system.

- After printing the sheets, **physically count the goods** in the warehouse and fill in the quantities on the sheets.
- Enter the actual stock into the system on the inventory item list. For each item:
    - Press [ENTER].
    - In the **QUANTITY** field, enter the counted quantity from the sheet.
    - In the **PURCHASE PRICE** field, provide the unit price of the item, according to which the value will be calculated.
        - The **PURCHASE PRICE** is by default filled with the current inventory price. If there is a difference between the system stock and the actual stock, it is **necessary** to fill in the purchase price.

> A missing value will prompt the system to propose two solutions: leaving these items in inventory or deleting them, which would result in no surpluses/shortages for them.

- For items that were not counted (their actual quantity is 0), fill the **QUANTITY** field with "0" using the function available from the inventory item level:
    - Press **[->] > ENTER "0" FOR UNCOUNTED**.

---

4. Closing Inventory

After entering all physical count data, you can close the inventory.

- In the open inventories overview (**cairo.ERP > ADMINISTRATION > INVENTORY > CURRENT**), highlight the selected inventory.
- Press [F10] (or **[->] > INVENTORY CLOSURE**).
- Confirm closing the inventory.
- Provide the following data:
  - **DOCUMENTS DATE**: Inventory closing date.
  - **SURPLUS DOCUMENT GROUP**: K+ document group for surpluses (optional).
  - **SHORTAGE DOCUMENT GROUP**: K+ document group for shortages (optional).
  - **NUMBER OF ITEMS PER DOC.**: Maximum number of items per difference document.
- The system will ask about **archiving inventory files**. Archiving is recommended for future data recovery.
- After the procedure is complete, the system will ask whether to delete the inventory header. If "yes" is selected, the inventory header remains but will not contain any items until they are added again.
- The result of closing are stock adjustment documents. Print them and confirm [F4] in: **ERP > INTERNAL DOCUMENTS > INVENTORY CORRECTIONS / INTERNAL TURNOVER**.

> Unconfirmed documents do not modify item card stocks.

---

5. Generating Post-Inventory Stock Reports

After completing the inventory, you can generate a warehouse stock report.

- The printout can be performed from two levels:
  - **From warehouse level**: In **ERP > WAREHOUSE**, press [TAB].
  - **From administrator level**: In **ERP > ADMINISTRATION > STATUS AS OF > [END]** > enter the inventory closing date > [ENTER] > [TAB].
- Depending on the chosen method for settling warehouse stocks, select one of the print options:
  - **BY AVERAGE PRICES**
  - **BY PURCHASE PRICES: FIFO**

Loyalty program

Overview of cairo.PROFIT

cairo.PROFIT is a loyalty system integrated with cairo.ERP. It allows calculating points for purchases, which customers can then exchange for rewards. It operates on principles similar to loyalty programs like Orlen Vitay or Payback.

How does cairo.PROFIT work?

Points are calculated after printing a **WZ (Invoice)** and **ZW (Invoice Correction)** document. In the case of a ZW document, points are not recalculated but are retrieved from the corrected document and recorded with a negative sign.

Points will be calculated if the document value exceeds the **minimum document value** set in the system parameters.

Detailed point calculation method

The cairo.PROFIT system calculates loyalty points for each document item, based on a series of parameters. Below we explain how it works step-by-step, taking into account the priorities of individual settings:

1. Priority of fixed item points

The system always first checks if a fixed number of points has been set for a given item. You can find this in:

ERP > GOODS CATALOG > [Enter] > LOYALTY SYSTEM > FIXED POINTS.

- If an item has fixed points set: The final number of points for that item will be the **product of these fixed points and the quantity of that item in the document**. In such a situation, the system **will not** take into account the item's value, the percentage for the customer type, or most multipliers, except for the final customer multiplier (see point 3).

Example: A customer buys 2 pieces of "Air filter" for which **50 fixed points** are set. They will receive **100 points** (2 pieces * 50 points/piece).

2. Calculating points from purchase value (when no fixed item points)

If an item **does not have fixed points set** (i.e., the "FIXED POINTS" field is empty or 0), the system proceeds to a more complex calculation based on the item's value and all active multipliers. This is the primary method for calculating points in most cases:

1. Base value: Points start from the document item's value – this can be net or gross value. You set this in:

ERP > ADMINISTRATION > PARAMETERS > LOYALTY SYSTEM > GENERAL PARAMETERS > DOCUMENT VALUE TYPE.

2. Percentage for customer type: The base value is then multiplied by the point calculation percentage assigned to the customer type (e.g., retail, workshop). These settings can be found in:

ERP > ADMINISTRATION > PARAMETERS > LOYALTY SYSTEM > GENERAL PARAMETERS, where there are sections for each customer type (e.g., "CUSTOMER TYPE: retail").

3. Multiplier "POINTS PER 1 PLN": The result from the previous step is multiplied by the global parameter "POINTS PER 1 PLN". This parameter determines how many points are awarded for each PLN and can be found in:

ERP > ADMINISTRATION > PARAMETERS > LOYALTY SYSTEM > GENERAL PARAMETERS > NUMBER OF POINTS FOR 1 zł.

4. Specific multipliers (hierarchy): At this stage, the system checks for additional multipliers that will increase or decrease the number of points. These are checked in a specific order, applying the **first one found that meets the conditions**:

- Multiplier for item group assigned to customer, checked in: **ERP > ADMINISTRATION > DICTIONARIES > CUSTOMER MULTIPLIERS FOR GROUPS**. This multiplier has priority, but will only work if the customer has met the minimum sales value condition (CALCULATE ABOVE).
- Customer multiplier: If the previous one is not active, the system looks for a multiplier set directly for the given contractor in: **ERP > CONTRACTORS > [Enter] > TRADE TERMS > MULTIPLIER IN THE LOYALTY SYSTEM**.
- Item group multiplier: If none of the above multipliers apply, the system will use the multiplier assigned to the item group itself to which the given item belongs. You can find it in: **ERP > ADMINISTRATION > DICTIONARIES > ITEM GROUPS > COMMODITY GROUPS > [ENTER] > SYS-LOJ MULTIPLIER**.

Example: A "Workshop" type customer buys an item from the "Car parts" group for **100 PLN net**.

- In the "Workshop" customer type settings (**ERP > ADMINISTRATION > PARAMETERS > LOYALTY SYSTEM > GENERAL PARAMETERS**), the percentage is **2%**.
- "NUMBER OF POINTS FOR 1 zł " (**ERP > ADMINISTRATION > PARAMETERS > LOYALTY SYSTEM > GENERAL PARAMETERS**) is **5 points**.
- For the customer and the "Car parts" group, there is an active multiplier of **1.2** (**ERP > ADMINISTRATION > DICTIONARIES > CUSTOMER MULTIPLIERS FOR GROUPS**).

- **Calculation**:
  1. Base value: 100 PLN
  2. After applying customer percentage: 100 PLN * 2% = 2 points
  3. After applying "POINTS PER 1 PLN": 2 points * 5 = 10 points
  4. After applying the item group multiplier: 10 points * 1.2 = **12 points**.

3. Final customer multiplier (always at the end)

Regardless of whether points were calculated based on fixed item points or purchase value, the final result is always adjusted by the final multiplier assigned to the customer. You can find it in:

ERP > CONTRACTORS > [Enter] > TRADE TERMS > FINAL MULTIPLIER IN LOYALTY SYSTEM.

- If this multiplier is set and is greater than zero, the total number of points will be multiplied by it and rounded to a whole number.

Example continuation: If, in the above example, the customer has a final customer multiplier set to **1.1**, they will ultimately receive **13 points** (12 points * 1.1 = 13.2, rounded to 13).

---

cairo.PROFIT Configuration

1. General Loyalty System Parameters

You can define the conditions for calculating points in the loyalty system. Access these settings in:

ERP > ADMINISTRATION > PARAMETERS > LOYALTY SYSTEM > GENERAL PARAMETERS

Settings include:

- **MIN. DOCUMENT VALUE**: Minimum document value from which points are calculated.
- **DOCUMENT VALUE TYPE**: Specifies whether points are calculated from the **net** or **gross** value of the document.
- **NUMBER OF POINTS FOR 1 zł**: Number of points awarded for each PLN.
- **OVERDUE POINTS AFTER**: Number of days after which points are considered expired.
- **SUPPORTED CARD TYPE**: Type of loyalty card (magnetic, internal barcode, arbitrary barcode).
- **DEFAULT SALES PRICE**: Default sales price for a reward.
- **DO NOT ACCUMULATE FOR OVERDUE ABOVE**: Setting the number of days of overdue payments after which points are not calculated.
- **REMOVE POINTS FOR OVERDUE ABOVE**: Setting the number of days of overdue payments after which loyalty points can be removed.

---

2. Customer Types

Customer types allow for differentiation in the number of points earned depending on the customer category.

Each customer type has a percentage of the item value assigned, which will be converted into points.

- **Retail**: Points are calculated after scanning the customer's card. A prompt will appear when printing the document. You can assign a **MAX. DISCOUNT**, above which points will not be calculated for an item.
- **Workshop**: Does not require card scanning.
- **Shop**: Does not require card scanning.
- **Wholesale**: Does not require card scanning.

---

3. Forms

You can edit forms for joining the loyalty system and for issuing rewards.

ERP > ADMINISTRATION > PARAMETERS > LOYALTY SYSTEM > FORMS

Forms can be self-defined, and their content can use predefined variables reflecting customer data.

---

4. Reward Warehouse

To add and issue rewards from a given warehouse, it must be designated as a reward warehouse.

ERP > ADMINISTRATION > WAREHOUSE LIST > [Enter] > REWARD WAREHOUSE

---

5. Item Configuration

The loyalty system can be configured for individual items.

ERP > ITEM CATALOG > [Enter] > LOYALTY SYSTEM

- **ACTIVE ITEM**: Specifies whether the item is included in the loyalty system and whether it is active. You can exclude selected items or item groups.
- **FIXED POINTS**: Number of fixed points received for purchasing this item.
- **REWARD**: Specifies whether the item is a reward. You can set for it:
  - **POINTS**: Number of points required to issue the reward.
  - **DESCRIPTION**: Reward description.
  - **WARRANTY**: Specifies whether the warranty is counted in days, months, or years, and its duration.

    - **RECEIPT TYPE**: Type of reward collection by the customer.
    - **AVAILABLE IN PERIOD**: Date range for the reward's validity (available options [Shift] + [<-], [Shift] + [->], [F2] for month, [F3] for year).
    - **REWARD CATEGORY**: Selection of reward category from the list.
    - **PROMOTED IN PERIOD**: Date range for reward promotion (available options [Shift] + [<-], [Shift] + [->], [F2] for month, [F3] for year).
    - **HIDE IF UNAVAILABLE**: Specifies whether the reward should be hidden if unavailable.

---

6. Point Multipliers

It is possible to add point multipliers that affect the number of points calculated.

ERP > ADMINISTRATION > DICTIONARIES > CUSTOMER MULTIPLIERS FOR GROUPS

You can add a new multiplier, edit an existing one, or delete it. A multiplier can be assigned to:

- Customer
- Customer group
- Item group
- Multiplier in the loyalty system

For a multiplier, you can set:

- **VALIDITY DATE RANGE**: Period during which the multiplier is active.
- **CALCULATE ABOVE**: Minimum required net value of customer sales documents during the multiplier's validity period.
- **DESCRIPTION**: Multiplier description.
- **PROMOTION DESCRIPTION**: Promotion description.

Multipliers considered when calculating points are also defined in:

- Contractor data: **MULTIPLIER IN LOYALTY SYSTEM** and **FINAL MULTIPLIER IN LOYALTY SYSTEM**.
- Item group data: **LOYALTY SYSTEM MULTIPLIER**.
- Multiplier definition per group for a specific customer: **ERP > CONTRACTORS > [F2] > ITEM GROUPS > [->] > CUSTOMER MULTIPLIERS**.

Managing Customer in Loyalty System

Customer information in the loyalty system is available in:

ERP > CONTRACTORS > [->] > LOYALTY SYSTEM

Available options:

- **CUSTOMER REGISTRATION**: Registering a customer in the loyalty system.
- **CHANGE CUSTOMER TYPE**: Changing the customer type (retail/workshop/shop/wholesale).
- **JOINING FORM**: Printing the joining form (editable from the parameters level).
- **WEB DATA**: Setting data for authentication on the website.
- **REWARD ISSUANCE**: Issuing rewards due to the customer.
- **TRANSACTION HISTORY**: Customer's transaction history in the loyalty system.
- **POINT TRANSFER**: Transferring points between contractors.
- **CHANGE NUMBER OF POINTS**: Manually changing a contractor's points.
- **QUARTERLY TARGET VERIFICATION**: Verification of quarterly targets.

Advanced Options

- **REMOVE POINTS FOR OVERDUE CUSTOMERS**: Option to remove points for customers with overdue payments.
- **REMOVE EXPIRED POINTS**: Option to remove points that have expired.
- **CHANGE CUSTOMER LOYALTY SYSTEM JOIN DATE**: Option to change the customer's loyalty system joining date.
- **IMPORT POINT CHANGES**: Option to import changes in customer points.

Reporting and Point Visibility

- **Statements**: Statements can be generated from the contractor catalog. **ERP > CONTRACTORS > [TAB]**
- **Point visibility in cairo.B2B**: The customer's point balance is visible in cairo.B2B. Customers can check available rewards there and add them to their cart.

Issuing Rewards

Rewards can be ordered by the customer in cairo.B2B or issued by the operator:

ERP > CONTRACTORS > [->] > LOYALTY SYSTEM > AWARD ISSUANCE

---

cairo.PROFIT Integration

cairo.PROFIT is an integral part of cairo.ERP and cannot be offered independently.

Integrations

How to configure a PeP payment terminal?

This article explains how to configure a PeP payment terminal to work with the cairo.ERP system. Configuring a PeP terminal enables handling credit card payments for sales and refunds.

PeP terminals support both sales and refunds. The device is configured by the PeP service provider, who sets the communication method (LAN or COM). You cannot change the communication type yourself. If you are unsure whether the terminal is set for LAN communication, contact PeP.

The terminal can be connected to Wi-Fi or via an Ethernet cable, depending on the device model.

Required information and settings

- **TID (pos id) number**: This is your terminal's identification number. You can find it on every printout from the terminal. If you can't find it, print a connection test from the terminal settings – in addition to the TID, you'll also find other information, such as software version and connection type.
- **Settings in cairo.Desk**:
  1. Go to **cairo.DESK > Ustawienia**.
  2. Make sure **Desk Webservice** is configured and enabled (Configuration details can be found **>>HERE<<**).
  3. Go to **Settings > Płatności > PeP > Ustawienia**. Here you need to provide the **TID** number, specify the **communication method**, and check the "ready" option.
  4. **Adding a workstation**: Go to **cairo.DESK > Stanowiska**. You need to add a workstation (e.g., fslinux913) that will send payments. If such a workstation does not exist, it should be created.

  > Remember that one cairo.Desk is connected to one terminal, but multiple workstations (so-called "fslinuxes") can connect to one cairo.Desk, allowing multiple computers to use a single payment terminal.
- **Workstation parameter settings in the ERP system**:
  1. Go to: **ERP > ADMINISTRATION > Parameters > Position> General parameters**.
  2. Enable the **Payment Terminal** option.
  3. Make sure the **cairo.DESK ACTIVE** option is also enabled.

Supported terminal models

All terminal models provided by PeP should be compatible. However, we always recommend direct contact with PeP, who will advise on the appropriate model after being informed about your use of cairo.ERP. Contacting PeP is also necessary to use their services.

Payment handling

After successful configuration, selecting the **credit card** payment method in the cairo.ERP system will establish communication with the PeP payment terminal.

Configuration

Configuration

How to reset document numbering at year-end?

Before starting sales in the new fiscal year, make sure that document numbering is set up correctly. The cairo.ERP system automatically resets document numbering and also updates year symbols (e.g., **yyyy** or **yy**) and month symbols (**mm**) if they are used in the numbering format.

Regardless of the automatic settings, before you begin working in the new year, it is worth checking the following elements:

- Document numbering and number extensions
- Cash document numbering
- Numbering of RW (internal release) and K+ (stock correction) documents

Resetting numbering for all documents (for the highlighted warehouse)

If necessary, you can manually reset document numbering or change number extensions, such as the year or month.

1. Go to **ERP > Administration > Warehouse List**.
2. Highlight the warehouse you want to edit, then press the **[Insert]** key to enter the numbering and extension overview for that warehouse.
3. To reset the numbering, press the **[F2]** key.
4. If the year was entered manually in the number extension (e.g., **2025**), change it to the current year (e.g., **2026**). You can also use templates that the system updates automatically, such as:
    - **<yyyy>** (current year in four-digit format, e.g., **2026**)
    - **<yy>** (current year in two-digit format, e.g., **26**)
    - **<mm>** (current month, e.g., **08**)
    - **<mag>** (warehouse symbol, e.g., **CE**) You can also create your own combinations of templates, for example **/<mag>/<yyyy>**.

This procedure must be repeated for each warehouse. To change the warehouse, press the **[F5]** key.

Checking cash document numbering

You must check and, if necessary, edit cash document numbering in the cash register settings.

1. Go to **ERP > Administration > Parameters > Cash/Bank > Cash register list**.
2. Press the **[Enter]** key on the selected cash register.
3. Check and change the **KP NUMBER**, **KW NUMBER**, and **EXTENSION** parameters.

Checking RW and K+ document numbering

If the numbering of internal release (**RW**) and stock correction (**K+**) documents is based on groups, you must verify it in the document group dictionaries.

1. Go to **ERP > Administration > Dictionaries > K+ stock correction document groups**.
2. For each defined **K+** document group, press **[Enter]** and change the **LAST NUMBER** parameter setting.
3. Perform the same procedure for **RW** documents by going to **ERP > Administration > Dictionaries > RW document groups**.

After completing these steps, the numbering will be reset according to the selected method.

> Other ways to change numbering are described **>> HERE <<**.

Configuration

How to configure your mailbox?

This article will show you, step-by-step, how to configure your email in cairo.ERP. This way, you'll be able to send documents directly from the program, saving you time and streamlining your work!

Benefits of setting up email in cairo.ERP

Setting up email in the cairo.ERP system offers great convenience. Thanks to it, you can:

- **Quickly send documents**: You no longer need to save invoices or other documents to your disk and then manually attach them to emails. You can send them directly from the program!
- **Send various types of messages**: The email sending option in cairo.ERP isn't just for invoices! You can use it for:
  - Sending documents to clients (e.g., invoices, orders).
  - Sending report printouts internally (e.g., to accountants, managers).
  - Sending general messages to clients.
  - Sending balance confirmations to clients.
  - Sending payment reports.
- **Save time**: Everything is in one place. No more switching between email programs and ERP.
- **Improve organization**: You can be sure you're sending correct documents directly from the system, which reduces the risk of errors.
- **Automatic email address suggestions**: If you fill in a contractor's email address in their data (**ERP > CONTRACTORS > [Enter] > GENERAL DATA > E-MAIL**), the program will automatically suggest this address when sending documents, further speeding up your work!

Setting up email account data

To set up your email in cairo.ERP, do the following:

1. Go to **ADMINISTRATION** in the ERP program.
2. Select **PARAMETERS**.
3. Go to the **E-MAIL** tab, then **ACCOUNT DATA**.

Now, fill in these fields:

- **STATUS**: Here you enable or disable email support.
- **DIRECTORY WITH CERTIFICATES**: This is where the program will find the necessary certificate files.
- **HOST**: This is the email server address. Examples:
  - WP: `smtp.wp.pl:465`
  - O2: `smtp.poczta.o2.pl:465`
  - Onet: `smtp.poczta.onet.pl:465`

  If you have email with another provider, you can find the SMTP address (a special address for sending mail) on their website.
- **LOGIN**: Your email login.
- **PASSWORD**: Your email password.
- **FROM**: The email address from which messages will be sent.
- **FROMNAME**: The name that will be visible to the recipient.
- **CERTIFICATE**: Here you select the certificate (if needed).

> The program does not support Gmail.

Sending emails and documents via email

Once everything is set up correctly, you can send documents via email directly from cairo.ERP.

Example of how to send an invoice:

1. Go to **ERP > SALES > INVOICES**.
2. Press **[Enter]**, then **[Tab]**.
3. Select **PRINT**. The options **print on - to file / email** will appear.

Sending to email

If you select the **e-mail** option, the program will send the selected document or other printout as an attachment in **TXT** format. Then, fill in the following fields:

- **TO**: The email address to which the message should be sent. Remember that if the contractor's email address is filled in their **general data**, the program will automatically suggest it.

- **SUBJECT**: The subject of your email.
- **MESSAGE CONTENT**: What you want to write in the email body.
- **ATTACHMENTS**: The name of the file you are attaching.
- **CONFIRMATION**: Whether you want to receive confirmation that the message reached the recipient.

Sending to file

If you select the **to file** option, you will have the option to save the document as a file in **PDF** format. After selecting the **PDF** format, check the **SEND TO EMAIL?** option to **YES**. You will then also need to fill in the same sending parameters as when directly selecting the "e-mail" option.

Sending emails from the contractor level

You can also send an email directly to a client if their address is filled in their contractor data:

1. Go to **ERP > CONTRACTORS**.
2. Select a specific contractor (press **[->]**).
3. Select the **SEND EMAIL** option.

Email message templates

To further speed up sending, you can define email message templates:

1. Go to **ERP > ADMINISTRATION > PARAMETERS**.
2. Select the **E-MAIL** tab, then **E-MAIL TEMPLATES**.
3. Here you can create and edit your templates.

When sending a message, in the **MESSAGE CONTENT** field, you can load a ready-made template by pressing the **[F2]** key.

What to do if something isn't working?

Error: NOT ALL MAIL ACCOUNT DATA ENTERED

This means you haven't filled in all the necessary fields with email account data. Go back to the **Setting up email account data** section (Point 1) and check if all mandatory data is completed.

Error: FAILED TO SEND MESSAGE

If the email won't send, check these things:

- **Login and password**: Make sure you have entered the correct login details for your email.
- **SMTP (IMAP) enabled**: Check if the **SMTP** service (sometimes called IMAP) is enabled on your email account. Some email providers require you to enable this manually. If you don't know how to do this, or if there's no such option, contact your email provider's customer support.