



User manual

EKÁER Handling

Dynamics 365 Business Central

HRP Europe Kft.

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1 Introduction

The Electronic Public Road Trade Control System (EKÁER, in short) is an innovation and a reporting requirement to reduce VAT evasion and was implemented in 2015.

We have created the Transport and EKÁER Module for Microsoft Dynamics 365 Business Central (BC) to make the relevant everyday administration, organization and planning easier.

This module does not only allow the management of transports falling within the scope of EKÁER but also the planning of shipments related to the company's business.

The purpose of the EKÁER part of the module is to support decisions about EKÁER notifications and to let you do all the relevant administration simply, in the ERP system.

Basic module functions:

- flexible parametrization
- transport compilation (sales, purchase, other)
 - for a single customer/vendor or as a groupage consignment
 - with a wide range of source documents
- separation of risky and non-risky products
- tariff number compression
- link to vehicle master data, vehicle data registration
- detailed address database
- currency conversion for EKÁER calculation
- setting weight and value thresholds for notifications
- notification suggestion based on data recorded
- submission of risky product value
- EKÁER document preparation and sending
- EKÁER status management
- EKÁER number and validity recording
- EKÁER modification from Business Central
- EKÁER document closing
- logging
- archiving

What you cannot do with the module:

- consignee notification (if a party different from the one officially obliged to notify wishes to make the notification)
- ADR number management
- FELIR ID management

2 Setup

You can access the Setup menu of the Transport Module via the Departments/Transport/Setup route.

The following settings are absolutely necessary for the proper functioning of the module:

1. Transport and EKÁER Setup: parametrization, access paths
2. Items: tariff numbers, gross weight (kg)
3. Definition of Risk Categories for and assigning them to tariff numbers
4. Assignment of nationality marks to Country/Region Codes
5. Correct and accurate company information
6. Detailed address data on warehouse cards
7. Bill-to address ID on customer cards (detailed address data are required)
8. Pay-to address ID on vendor cards (detailed address data are required)
9. Notifying user data in the User setup menu or the Transport and EKÁER Setup
10. optional: Vehicle master database generation
11. optional: foreign currency exchange rate, required for foreign currency transactions

3 Tariff numbers/Business Service numbers

This is where you need to enter the tariff numbers used and you can classify them into risk groups. (For risk groups, see Chapter 3.5 Transport riskiness codes)

Use the “New” button on the Ribbon to add a new item to the list or use the “Edit List” option to directly edit the list.

Important: You must assign a Riskiness code to the tariff numbers The Module uses the Riskiness code settings to qualify the product belonging to the tariff number in question either as risky or non-risky.

When preparing the master database for tariff numbers, pay attention to providing information to 8 characters accuracy. (8 digits)

The EKÁER Module allows the aggregation or abbreviation of information on the EKÁER documents; accurate information is, however, always very important.

4 Vehicles

The EKÁER Module lets you enter either your own or third-party vehicles. Entering transport vehicle data can greatly ease later work and shorten processing time.

Entering a new vehicle:

- **Code (Plate Nr):** enter the plate number of the vehicle without hyphen(s).
- **Type:**
 - Truck
 - Trailer
- **Description:** optional text
- **Road Toll Required:** if the vehicle is subject to road toll, then please check this field.
This information is important because the Module will use it to tell the user if an EKÁER number is necessary for a transport.
The Module will only check the value of this field if the “EKÁER Road Toll Vehicle” field is enabled in the Transport and EKÁER Setup.
- **Own Weight:** the own weight of the vehicle, without cargo
- **Country/Region Code:** select the relevant country and the Module will assign the respective code to the plate number based on the Nationality mark* in the Country/Region code table.
- **Vendor Number:** if the vehicle does not belong to the company but one of the carrier or forwarder partners, then you can assign the relevant company to the card of the relevant vehicle.
- **Vendor Name**
- **Blocked:** if you block a Vehicle card, then you cannot use it for transport planning. You can disable the block at any time.

*Adding a Nationality mark:

Use the search window to find the Countries/Regions menu or open it through the Administration/Application Setup/General path.

Use the Edit List button to add a new line or to enter a value in the Nationality Mark fields for the existing lines. (it can be 2 characters long)

Resource and vehicle link:

You can use the Vehicle master database to create Resources. (optional)

You can create resources by pressing the Actions/**Create Resources** button. The resource generated from a vehicle will be a Machine.

You can view the resources card of a Vehicle by pressing the Actions/**Resources Card** button.

5 Resources

The assignment of Resources is optional in terms of the Transport Planning Module.

There are two major Resource groups: Machines and Persons.

In this case, we manage vehicles as “Machines” and drivers as “Persons”.

Adding a new resource:

Click on the “New” button on the Ribbon then do the necessary setup in the pop-up window:

You can create Resources from Vehicles with the Create Resources button on the Vehicle Card.

6 General setup:

You need to make the following settings on the General tab of the Resources Card:

- **No.:** Resource ID
- **Name:** optional description
- **Type:** Person or Machine
- **Basic Unit of Measure:** the unit of measure of the relevant resource. E.g. hours (working hours) for persons.
- **Search Name:** the description that supports identification during searches. You can give the same that is in the “Name” field.
- **Resource Group No.:** the logic you can apply to group resources is optional. If you have created resource groups, you can categorize them to the right group here, on the card
- **Blocked:** if you activate this field, the Resources Card will be blocked, and you cannot use it during the sessions.
- **Last Date Modified:** you cannot edit this field; the system automatically loads it based on the date of the last valid modification

7 Invoicing setup

You should enter this information if you want to take costs and revenues related to a person/machine into account (...)

If so, one of the most important steps is filling in the fields of the General product posting group, the VAT product posting group and the Default code for accrual/deferral.

- Purchasing unit price
- Indirect cost %
- Unit cost

- Price/profit calculation
- Profit %
- Unit price
- General product posting group
- VAT product posting group
- Default code for accrual/deferral
- Automatic ext. text
- IC partner purch. G/L acc. no.:
- Tariff numbers/Business Service numbers

8 Enter personal data

If you wish to record a “Person” resource, you can also record important personal data of the relevant person such as

- Job title
- Address
- Address2 (optional extra field if the maximum character length of the “Address” field is not enough)
- Post Code
- City
- Social Security No.
- Education
- Contract Class
- Employment Date

9 Vehicle Setup

For “Machine” resources, you need to enter vehicle or trailer data on the Vehicle tab. You need to record trailers as separate Resources.

(If you start on the Vehicle card (you should!), then the Module will copy key data to the resource card.)

- **Road Toll Required:** if the recorded vehicle is subject to road toll, then please check this field.
- **Own Weight (kg):** the own weight of the vehicle
- **Country/Region Code:** you can determine the nationality mark of the vehicle based on the county and region code. Open the drop-down field and use the “Advanced” button to navigate to the underlying table. If you can see country and region codes here, then you can also see their relevant Nationality Mark in the right column. If the table is already filled in, then all you need to do is simply selecting the relevant line for the vehicle.

Example:

The country and region code of Hungary is “HU”, the relevant nationality mark (which the EKÁER always mandatorily requires for the plate number) is “H”.

This information is key if you want a successful EKÁER notification. If you do not provide it, your notification will be incomplete.

3.2.5 Connected resources

Regarding Resources it is important to know that you can assign “Person” resources to vehicles. (If you want to define which driver belongs to which vehicle.)

You can define the link on the relevant resource card (e.g. truck), using the Navigation tab/**Connected Resources** menu on the top Ribbon.

You can assign any number of “Person” resources to “Vehicle” resources. You can select from the Resource list by opening the “Connected Person Code” drop-down field.

You can also define which person is the default resource for the relevant vehicle.

10 Road planning ID

If you have standard shipment routes, then you can define them and assign IDs to them in this setup. Later, during transport planning, you can use these settings to easily group shipments.

All you need to enter is a code and a description. (There are not any underlying setting options, you should look at Road planning IDs as labels.)

You should assign the road planning ID to your partners on the Vendor/Customer cards.

You can do this on the Receiving fast tab for **Vendors**. If a vendor has multiple Order Addresses, then you should define each on the Order Addresses card.

You can do this on the Shipping fast tab for **Customers**. If a partner has multiple Ship-to Addresses, then you should define each separately.

11 Transport and EKÁER Setup

12 General information

- **Transport Base Calendar Code**

In this menu item, you can set a calendar template for the Transport module and you can define holidays, non-shipment days etc. as you choose.

It is, however, important, primarily for **foreign currency exchange rates**; you can set the first and last working days of the year. (It is important for determining the foreign currency exchange rate.)

- **Conversion Currency Code:** enter the HUF value. (Even if your own currency is HUF.)—Technical field. It is intended to ensure that the value of transported products is always considered in HUF for EKÁER purposes, as regulated.
- **Country/Region Code:** enter “HU” value, this will determine what we consider “domestic”. For EKÁER purposes, “domestic” means Hungary.

13 Numbering

You can use the Numbering fast tab to set the no. series for the module.

Click on the drop-down menu and select the “Advanced” option to display the list of no. series to create new no. series and modify existing ones.

- **Document Nos.:** non-mandatory, entering the other three no. series is sufficient.
- **Request Nos.:** The no. series of messages generated in the communication between Business Central and the National Tax and Customs Administration.
Important information! Do not use slashes (/) in the message no. series!
- **EKÁER Nos.:** Serial numbers of EKÁER documents (in Business Central)
- **Transport Nos.** Numbers of transport tasks.

14 Risk assurance

“The purpose of the risk assurance is to assure any and all rates and taxes related to the relevant transaction.

The assurance amount must always be at least 15 percent of the combined value without tax of

(a) the products belonging to the EKÁER numbers provided during notifications and having been reported to have arrived to their destination/to have started loading, and

(b) the products pertaining to EKÁER numbers that are still valid

in the previous 60 days.” (www.ekaer.hu)

It is important to note that the (net) value of products to be notified on a given day should also be considered.

The taxpayer may decide how to fulfil the obligation, by paying to a separate deposit account (Financial deposit) or by providing a guarantee (Bank guarantee).

You can enter this information and make the relevant settings on the Risk Assurance fast tab (in HUF) This does not affect the books in the system.

- **Amount of Financial Deposit**
- **Amount of Bank Guarantee**

The EKÁER Decree regulates exceptions from the guarantee obligation.

15 Hazardous items

When transporting dangerous items, it is mandatory to enter the ADR number in the data provision. For this reason, a new ADR number field was introduced on the item card:

Item Card

ABEVJ21-00003 · Teszt fordított mg termék

Process Request Approval Item Prices & Discounts More options

Item > KG

Inventory > 3 184

Costs & Posting Show more

Cost Details	Posting Details
Costing Method FIFO	Gen. Prod. Posting Gr... ÁRUK
Standard Cost 0,00	Inventory Posting Gr... ÁRUK
Unit Cost 735.60861	Default Deferral Tem...
Net Invoiced Qty. 3 184	Foreign Trade
Cost is Adjusted <input type="checkbox"/>	Tariff No. 72139109
Purchase Prices & Dis... Create New...	ADR No. 1234567910

This can be selected from the values specified in the ADR Numbers menu item:

No. ↑	Description
→ 1234567910	Teszt ADR

If the VTSZ/SZJ number belonging to the item is marked as Hazardous, the value of the field is inherited on the shipping document, the ekaer document, and the sent xml:

No. ↑	Sup... Units	Supplem. Unit of Measure Code	Incl. In Rev... VAT	Tariff Group Code for Rev. VAT	Pur... Decl...	Type (Online Invoice)	FELIR Req...	Hazardous	Riskiness
→ 12348765	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>	R
72139109	<input type="checkbox"/>		<input checked="" type="checkbox"/>	7214	<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>	R

```

<items>
  <tradeCardItem>
    <itemExternalId>10000</itemExternalId>
    <itemOperation>create</itemOperation>
    <tradeReason>S</tradeReason>
    <productVtsz>90000001</productVtsz>
    <productName>Fa</productName>
    <adrNumber>1234567910</adrNumber>
    <weight>0</weight>
    <value>10000</value>
  
```

16 EKÁÉR

- **EKÁÉR Enabled:** you can enable the system to request EKÁÉR numbers for each transport by activating this field
- **Aggregate EKÁÉR Lines on Risk Categories:** activate this field to let the system aggregate risky items defined in the transport planning phase and having a similar tariff number in a single line based on previous settings (Chapter 3.5 Transport riskiness codes).
- **EKÁÉR Toll Road Vehicle:** activate this field to let the system check if the vehicle is subject to road toll based on information on the Vehicle card or information provided in the transport planning phase. If you do not make this setting, then the system will not use these settings of the relevant resource.





The proposing method of the Module applies the separate rules laid down by the EKÁÉR Decree for transports with road-toll vehicles and other rules for transports with non-toll vehicles.

The Module has been adjusted accordingly. It is recommended to enable this field and to enter road toll information either on the Vehicle card or manually for the transport.

- Default load date:
 - Empty
 - Transport Date
 - Work Date

This field controls what Loading Date is assigned to the lines of EKÁER documents generated on the basis of the transport. Not filled in if “Empty”, you should enter it manually later on; In case of “Transport Date”, the EKÁER document will get the transport date of the transport itself; if you select the “Work Date” option, the day on which the user works will be entered in the Loading Date fields.

The following table illustrates the next section of EKÁER settings:

Transported product:	Type of transport vehicle:	
	<i>Subject to road toll</i>	<i>Not subject to road toll</i>
<i>Risky product (Decree No. 51/2014. NGM)</i>	More than 500 kg or HUF 1 million 	More than 500 kg or HUF 1 million 
<i>Non-risky product</i>	More than 2,500 kg or HUF 5 million 	Total weight is more than 3.5 tons* 

*Total weight: the combined weight of a (non-toll) vehicle with a total weight not more than 3.5 tons and the cargo carried by it.

Table 1 How EKÁER obligations arise

Source: ekaer.nav.gov.hu

You should, accordingly, define the following setting points:

- **EKÁER non-toll Vehicle - Total weight (kg):** you can use this field to define what weight limit (for the entire transport) Business Central should apply in suggesting the requesting of an EKÁER number for non-toll vehicles. (Gross weight, the vehicle and the cargo together.) – **blue category**
- **EKÁER non-toll Vehicle - Total weight (kg) - Risky products:** for transports with non-toll vehicles, you can set the weight at which Business Central suggests requesting an EKÁER number for risky products. (Gross weight of cargo only.) – **yellow category**
- **EKÁER non-toll Vehicle - Value (HUF) - Risky products:** for transports with non-toll vehicles, you can set the HUF threshold at which the EKÁER Module suggests requesting an EKÁER number for risky products. – **yellow category**

Table 2 How EKÁER obligations arise

- **EKÁER Toll Vehicle - Total weight (kg) - Risky products** for transports with road-toll vehicles, you can set the weight at which Business Central suggests requesting an EKÁER number for risky products. (Gross weight of cargo only.) – **green category**
- **EKÁER Toll Vehicle - Total weight (kg) - Non-Risky products:** for transports with road-toll vehicles, you can set the weight at which Business Central suggests requesting an EKÁER number for non-risky products. (Gross weight of cargo only.) – **red category**
- **EKÁER Toll Vehicle - Value (HUF) - Risky products:** for transports with road-toll vehicles, you can set the HUF threshold at which the EKÁER Module suggests requesting an EKÁER number for risky products. – **green category**
- **EKÁER Toll Vehicle - Value (HUF) - Non-Risky products:** for transports with road-toll vehicles, you can set the HUF threshold at which the Module suggests requesting an EKÁER number for non-risky products. – **red category**

Never write zero in any field. When generating the EKÁER documents, the Module calculates by checking, among others, the relevant values and weights, and if it finds a value higher than or equal to that in the setup, then it shall regard the condition as TRUE, i.e. it will suggest EKÁER notification.

17 Documents

In this menu item, you can specify the documents Business Central should use in the Transport Planning and EKÁER Module.

The following ones are currently available:

- Purchase order
- Sales order
- Posted sales shipment
- Posted sales invoice
- Posted sales return shipment
- Transfer order
- Warehouse shipment

Depending on their type, each source document is available at its respective transport type:

- Purchase transport: Purchase order
- Sales transport: Sales order, Posted sales shipment, Posted sales invoice, Posted sales return shipment, Warehouse shipment (sales order lines)
- Other transports: Transfer order Warehouse shipment (transfer order lines)

We will inform all our partners about any further development projects.

18 EKÁER interface

The EKÁER interface fast tab is for technical settings. Business Central will use these to communicate with the EKÁER server of the National Tax and Customs Administration.

The EKÁER interface fast tab is for setting up the LIVE communication!

- **Login**
- **Password**
- **Signing key**

You need to enter these data on this interface if you submit notifications in the name of a single EKÁER user only.

If you have multiple users, then you need to enter the data in the User Setup menu. (For more information, please see Point 3.7.)

- **Save directory (request):** save directory of XMLs sent
- **Save directory (response):** save directory of XMLs received in response
- **XML port ID:** necessary for module operability: 42018850
- **Service page:** production environment path
- **Validation page:** production environment path

You can enter User settings in the Users menu, **you do not need to enter them here.**

19 Test interface

- **Test mode enabled:** as long as this setting is enabled, the system will communicate with the test environment and will not submit any data.
- **Test user**
- **Test password**
- **Test signing key**
These data are required for accessing the test environment and are provided by the National Tax and Customs Administration.
- **Test VAT registration no.**
- **Test service page**
- **Test validation page**

20 Transport riskiness codes

According to the definition of the National Tax and Customs Administration, products that have a VAT evasion risk are the risky products in terms of EKÁER. Accordingly, they distinguish between *risky foodstuffs* and *other risky products*. (The precise list is available on the official website of the NTCA.)

You can set risk groups in this menu. Tariff numbers must be assigned to Risk categories; the riskiness of a product belonging to a tariff number is specified based on the risk category.

In addition to riskiness, you can also set the number of characters the Module should compress the tariff number to when it is requesting an EKÁER number. (8 characters are mandatory for risky products, you cannot use a shorter format.)

21 EKÁER user data

You have two options for providing the data of the user making the notification:

1. If the business uses a pair of a Login and a Password, then it is sufficient to provide the (EKÁER) Login, Password and Signing key in the Transport and EKÁER settings menu.
2. If there are multiple EKÁER users, then enter the relevant data in the User setup menu:

22 Correct address data

23 Company information

Open the “Company Information” menu that you can reach either via the Departments/Abev/Setup path or by copying it into the browser line.

Providing detailed address data and a tax identification number are prerequisites to the use of the EKÁER Module.

24 Customer addresses

There are two important customer addresses: Bill-to address ID and Ship-to addresses.

You can enter the **Bill-to address ID** on the Invoicing fast tab of the Customer card. You can add address(es) by pressing the “New” button after opening the drop-down menu. The EKÁER Module will always use the currently selected addresses.

You can access the **Ship-to addresses** on the Home tab of the top ribbon, in the Customer section. They are optional and not a must for the EKÁER Module.

You can enter the Country/Region code, Post code and City data on the General fast tab, while you can enter the Name of public premises, the Type of public premises and the House number fields on the Detailed address fast tab.

25 Vendor addresses

There are two important vendor addresses: Pay-to addresses and order addresses

You can enter the **Pay-to address ID** on the Invoicing fast tab. Use the drop-down menu to enter a new address or select one from the previously recorded ones. The EKÁER Module will use the currently set Pay-to address ID.

You can also enter **Order addresses** for Vendors. Needless to say, this is not mandatory. If a vendor has an order address, and the user adds it to a purchase order, then the EKÁER Module can use it as a Loading Place in transport planning.

You can enter order addresses in the Order addresses option on the Navigation tab of the top ribbon of the Vendor card.

In the Order addresses, it is important to provide the Post code, City and Country/Region code data on the General fast tab, while the Name of public premises, Type of public premises and House number fields are on the Detailed address fast tab.

26 Warehouse addresses

It is especially important that warehouse addresses in Business Central are also correct as these will be used as Loading or Unloading Place. (depending on the event)

You can access the Warehouses either using the browser window or on the Application Setup/Warehouse/Warehouse path.

Enter the Post code, City and Country/Region code data on the General tab and enter the Name of public premises, Type of public premises and House number data on the Detailed address fast tab.

27 Entering item data correctly

To ensure a perfect EKÁER number request, you must pay attention to entering all master data correctly and accurately.

This includes, on the Items card:

- the tariff number
- the Gross weight (kg)

Tariff number:

You can enter the tariff number on the Price & Posting fast tab of the Item card.

This requires that a risk category is assigned to the tariff numbers as described in Chapter 3.6. (This can be a technical code, e.g. if a company does not have risky products and does not want to

complicate the grouping of its products, then a single group can be sufficient; all you need to do is to assign this to the tariff numbers.)

Gross weight:

You can enter the gross weight on the Inventory fast tab of the Item card.

For EKÁER purposes, enter the weight in kilograms.

28 The EKÁER process

After completing all the settings mentioned so far, let's see how you can request an EKÁER number and how you can get to the end.

You always need a source document line. You can choose a Purchase, Sales or Other transport, depending on the transaction. For the transport, you can give the shipment date, vehicle data and, needless to say, the cargo. You can select the shipping lines from the source documents.

The system uses the transports to generate the EKÁER document(s) which the user can send to the NTCA system. If the submission is successful, you will receive a valid EKÁER number and the relevant validity period on the interface.

Figure 1. EKÁER process

29 Transport generation

You can access and create individual transports in the Departments/Transport/Documents menu, depending on the type. Or you should use the Sales transports, Purchase transports or Other options.

To generate an EKÁER notification in the system, you must have a transport the subsequent notification will be based on.

Before you would start working in the Transport and EKÁER Module, we must note that all the necessary master data must be available, complete and up-to-date, in addition to the settings detailed above.

It is imperative that

- all **item cards** we use have a set tariff number (VTSZ) and net and gross weight data
Setup:
Items/... item/Inventory fast tab/net and gross weight

Items/... item/Price & Posting fast tab/Tariff number

- address data on **customer and vendor cards** must be complete (address, tax identification number, post code... etc.)
 - multiple customer ship-to addresses should be entered in the Customer card/Actions/Customer/Ship-to addresses menu item.
(If it is not on the ribbon by default, then you can access it with a right click on the ribbon and selecting the → **Customize ribbon** option. Put the “Customer” group in the “Available” column on the left onto the ribbon and press the “OK” button to finalize the changes.)
 - Multiple vendor ship-to addresses should be entered in the Vendor card/Navigation/Vendor/Order addresses menu item.

Entering these addresses is important because the addresses of the Consignor and the Consignee on the EKÁER document will be generated from the basic addresses on the customer and vendor cards, while the addresses entered in the Order addresses and Ship-to addresses menus will be used to generate the Loading and Unloading Places.

- all necessary **vehicles** are recorded and all data are entered if they are important for the transport; therefore, for vehicles, for instance:
 - the vehicle number must be the plate number itself, without hyphen(s);
 - enter the country/region code to determine the nationality mark;
 - enter vehicle weight data;
 - specify if it is a toll vehicle.

Vehicle settings:

Departments/Transport/Setup/Vehicles

30 Transport characteristics

- Purchase transport
 - The Consignor will always be the Vendor the company purchases the goods from. If a single transport takes goods from multiple Vendors, then the Consignor code is not necessary for the transport
The detailed address data of the Pay-to address ID taken from the Vendor card will be added to the Consignor data on the EKÁER documents. (automatically)
 - By default, the system takes the company’s own data as Consignee data based on information in the Company information menu.
 - The Loading Place is generated in two ways

- if the Order address code was provided on the source document (the Purchase order in this case), then the system will add the data of the relevant Order address
 - if no Order address code is provided on the source document, then the address belonging to the Pay-to address ID of the Vendor will be added to the Loading information
 - The Unloading Place will be the address of the warehouse specified on the source document (the Purchase order in this case). The EKÁER Module uses the detailed addresses of the Warehouse cards.
- Sales transport
 - The Consignor is always the own company; the address data of the Consignor are, therefore, added based on the information in the Company information menu
 - Consignee data are added based on the information related to the Bill-to address ID on the Customer card.
If it is a groupage consignment, the Consignee field of the transport remains empty; on the EKÁER document, however, the data belonging to the Bill-to address ID mentioned above will appear for all customers
 - The Loading Place is taken from the detailed address data pertaining to the warehouse provided on the source document
 - The Unloading Place is added in two ways
 - if a Ship-to address ID was provided on the source document (e.g. Sales order, Posted sales shipment), then the Module will use the relevant address data
 - If no Ship-to address ID was provided on the source document, then the address data pertaining to the Bill-to address ID of the Customer is used
- Other transport
 - Currently, both the Consignor and the Consignee use the data of their respective companies.
 - The Loading and Unloading Places are indicated with the detailed addresses of the Warehouses specified on the source documents

31 Purchase transport creation

Its precondition is to enable the document types from which you can make Purchase transports in the Transport and EKÁER setup menu. Currently, you can create such transports from Purchase orders; if new options are available, we will inform the users.

Enable the Purchase Order type if you had not done it before.

To create a Purchase transport, you still need a **Purchase order**, i.e. a source document with lines to work with.

If all the settings are correct and we have at least one purchase order, you can start creating the Purchase transport.

Transport creation:

1. Use this path to open the Purchase transports list: Departments/Transport/Documents/Purchase Transports; or use the search window.

2. Use the “New” button in the top ribbon to open a new Purchase transport.
3. The system now opens a new Purchase transport planning card. (In planning status)
4. Enter the Shipment date.
5. Enter the consignor
 - a. If you transport goods from a single vendor, then enter the Consignor number.
 - b. If it is a groupage consignment, you do not need to enter the Consignor as there are, logically, multiple Consignors and we will have multiple EKÁER documents. (managed by the module)

The Module can take the Consignor data only from an existing Vendor card. This means that you can create EKÁER documents and transports for vendors which were previously added to the Vendors’ list.

6. If, at this stage of transport organization, you already have information about the shipping vehicle, then enter the relevant data on the Transport fast tab.
 - a. You can enter the vehicle plate number either manually (always without hyphens) or you can select one from the Truck elements of the Vehicles list.
 - b. You can enter the Trailer plate number either manually (always without hyphens) or you can select one from the Trailer elements of the Vehicles list.

The system will know which nationality mark to use based on the Country/Region code provided.
7. After that, please select the products to be transported for the transport lines.
 - Lines menu/Functions/Select transport lines
 - You can use the date filter function in the system. If you do not specify a date filter, you will see all the potential lines in the list. Specify an interval to narrow down the search. The most common way is giving the actual working day as start date.
 - You can filter the so-generated list as usual. The best is if you filter for the Source document type or number.
 - You can select multiple lines at the same time and add them to the transport.
8. After adding the relevant lines, the system will automatically calculate the amount and weight of the transport. (Use the Update button, if necessary.)

9. After entering the necessary information, generate the EKÁER documents with the Process EKÁER documents button.

This changes the transport status to Launched.

You cannot edit the transport in Launched status. To edit it, select the Plan button; at the end of the process, update the available EKÁER documents with the Process EKÁER documents button.

You can access the relevant EKÁER documents with the EKÁER Documents button in the top ribbon.

32 Sales transport creation

You need a Source document to create a sales transport. **Sales order, Posted sales shipment, Warehouse shipment Posted sales return shipment**, and the enabling of these documents. (Transport and EKÁER setup menu)

Needless to say, you also have the option to enable only a single type, as business processes require.

Transport creation:

The procedure in this case is similar to that of the Purchase transport.

The key difference is in the available source documents and the fact that the data of our company appear as default address in the information fields of the Consignor in case of Sales transports.

1. Departments/Transport/Documents/Sales transports—This list view shows previously created sales transports with varying status.
2. Click on the “New” button on the ribbon. The transport status is now “Planned”.
3. Enter the shipment date. At the same time, the system automatically fills in the Consignor address, i.e. that of the company.
4. Enter consignee data
 - a. if you ship goods to a specific customer, enter the Consignee code on the Address data tab. (Customer code.) The customer must be in the Customer Master Data, i.e. it must have an active customer card.
 - b. if you are planning a groupage consignment, do not enter any Consignee code; there will logically be multiple consignees, and the Module will manage this and determine and create the necessary number of EKÁER documents based on the added lines.

5. If, at this stage, you have information regarding the transport vehicle, fill in the Transport tab fields that pertain to the Vehicle and the Trailer.
 - a. You can enter the vehicle plate number either manually (always without hyphens) or you can select one from the Truck elements of the Vehicles list.
 - b. You can enter the Trailer plate number either manually (always without hyphens) or you can select one from the Trailer elements of the Vehicles list.

The system will know which nationality mark to use based on the Country/Region code provided.
6. Display the selectable lines as follows: Line/Functions/Select transport lines
7. Use the Date filter to narrow the search hits.
8. Select the lines concerned and click on the “OK” button. The system will now load the data into the lines of the transport planning sheet.

After entering all the necessary data, the system will calculate the total transport weight and total transport value in HUF and display it in the header. Use the “Update” button.

9. After entering the necessary information, generate the EKÁER documents with the Process EKÁER documents button.

This changes the transport status to Launched.

You cannot edit the transport in Launched status. To edit it, select the Plan button; at the end of the process, update the available EKÁER documents with the Process EKÁER documents button.

You can access the relevant EKÁER documents with the EKÁER Documents button in the top ribbon.

33 Create EKÁER notification

You must request the EKÁER number until the start of the transport at the latest.

An EKÁER number is valid for 15 (calendar) days as from the date of requesting it. (– if the shipment takes longer than 15 days, you must request a new EKÁER number after the expiry of the 15 days.)

In Business Central, you can make an EKÁER notification based on an existing Transport only.

34 EKÁER document creation

You can create an EKÁER document using the “Process EKÁER documents” option in the top ribbon of the relevant transport.

After creating the document, you can access it with the “EKÁER documents” button.

The EKÁER document in itself is only a draft in the Business Central system. You can access all the EKÁER documents here, not only from the data sheet of the relevant transport:

Departments/Transport/Documents/EKÁER documents

In the list view, you can filter and search data as you like.

Go on the relevant line to navigate to the respective EKÁER document with the Edit or View buttons of the ribbon.

35 Statuses

36 Document statuses:

- **To Send**
- **Notified - Confirmed**
- **Notified - Unsuccessful**
- **Modified - To Send**
- **Modified - Confirmed**
- **Modified – Unsuccessful**
- **Cancelled - To Send**
- **Cancelled - Unsuccessful**
- **Closed - To Send**
- **Closed - Confirmed**
- **Closed - Unsuccessful**

A document has the “**to send**” status in Business Central if the data has not been forwarded to the NTCA system yet (irrespective of the fact whether it is completely new information or only a modification)

A document has the “**confirmed**” status if the data has been forwarded and successfully recorded in the EKÁER system of the NTCA

A document has the “**unsuccessful**” status if the forwarded data has some kind of a defect or there is an error in the data connection. It always refers to the last modification.

37 EKÁER statuses:

- **Draft:** The notification has the “Draft” status until it is sent to the NTCA. It is not equal to the “Draft” status in the NTCA system, i.e. Drafts in Business Central do not appear as planned notifications on the NTCA website.
- **Active:** notifications with valid EKÁER numbers have this status
- **Cancelled:** The status of successfully deleted documents.
- **Closed:** An EKÁER document becomes closed in the NTCA system if you provide the unloading date and then forward the request for closing

Statuses are to be interpreted together.

38 Change log entries

If you get an “unsuccessful” message during EKÁER notification, investigating the Change log entries might be useful.

You can access the Change log entries from the top ribbon of the EKÁER document.

Open the log entries to check the sender of the data, the error message and when it was received.

The Change log entries include all EKÁER-related data sending information; it is, therefore, not only for managing errors, but also for checking the user responsible for the notification, when the notification was modified and what was the reason for its submission, etc.

Typical errors:

(Based on the reason codes in the Response xml message):

- TC_MOD_REASON_MISSING: Specifying the reason for modifying the notification head is mandatory!
- TCI_MOD_REASON_MISSING: Specifying the reason for item modification is mandatory!

- TC_ONLY_SELLER_DELIVERY_ALLOWED_WITH_TRADETYPE: The consignee can do the notification in case of trade type “D” only! The consignee cannot do the notification with the specified tradeType direction! (D stands for Domestic, i.e. Hungarian)
- TC_SELLER_VATNUMBER_MUST_BE_CUSTOMERS: The tax identification number of the notifier (customer) must be identical to the tax identification number of the seller (sellerVatNumber)! It is possible in case of non-consignee notification! (isSellerDelivery=true)
- TC_DESTINATION_VATNUMBER_MUST_BE_CUSTOMERS: The consignee tax identification number must be identical to the tax identification number of the notifier! It is necessary for notifications done by the consignee. (isSellerDelivery=false)
- TCI_RISKY_TRADECARD_ITEM_ONLY_ALLOWED_WITH_SELLER_DELIVERY: Consignee notification is not an option in case of risky items!
Transports of risky products must be notified by the consignor!
- TC_SELLER_DELIVERY_MOD_NOT_ALLOWED: The isSellerDelivery cannot be modified!
- TC_FINALIZE_NOT_ALLOWED: Finalization, closing is not allowed! Consignee notifications typically cannot be closed manually, they close automatically with the expiry of the EKÁER number.
According to the EKÁER rules, notifications must be closed for import and domestic transports, but not for export transports. For precise information, please see the EKÁER Decree.
- TC_UNLOAD_LOCATION_COMPANY_INFO_MISSING: In the import direction (tradeType=I) and for risky product shipments, if the unloading place (recipient, unloadLocation) does not match the consignee (isDestinationCompanyIdentical=false, destinationVatNumber, destinationName), then you have to enter the tax identification number and name of the receiving company (unloadLocation.VATNumber, unloadLocation.name)!
- TC_IS_DESTINATION_COMPANY_IDENTICAL_MISSING: The XML does not arrive on the interface. The isDestinationCompanyIdentical element is managed with a default false value!
- TC_IS_DESTINATION_COMPANY_REQUIRED: This error code cannot appear on the XML interface because TC_UNLOAD_LOCATION_COMPANY_INFO_MISSING appears earlier! These two error codes cover two identical cases!
- TC_NOT_ALLOWED_DATA_MODIFICATION: Not allowed data modification. The caller receives this error if he/she tries to modify a piece of notification data that may, for whatever reason, not be modified
- TCI_ITEM_OPERATION_MISSING - no itemOperation arrived in item
- TC_UNKNOWN_LICENCE_PLATE_COUNTRY_CODE - the value of the vehicle/country field does not match the allowed list
- NO_VALID_MASTER_USER - this might happen to secondary users if the relevant registration does not have a valid primary user, then the secondary users may not do notification operations
- TCI_PRODUCT_MOD_NOT_ALLOWED – You do not have the right to modify the product item
- TCI_CREATE_NOT_ALLOWED – You do not have the right to create the goods item
- TCI_DELETE_NOT_ALLOWED – You do not have the right to delete the goods item
- LOW_BALANCE – insufficient coverage (this might occur if the risk assurance for risky products is low)
- TC_INACTIVE_CPA_FOUND – The notification has an item with an inactive (invalid) tariff number

39 Presentation and editing of EKÁER documents

There might be characteristics that require modification before (but even after) requesting the EKÁER number. /In the later chapters you will also learn how to modify an already existing EKÁER notification./

Before the specific EKÁER number request, you can make minor modifications as follows:

Go to the relevant line in the EKÁER documents list (Departments/Transport/Documents/EKÁER documents) and click on the Edit button on the ribbon.

40 General information on the document

- **Document number:** it is the serial number of the EKÁER document generated in Business Central (these documents have their separately adjusted own no. series). Note that this is only the serial number of the document in Business Central and not the EKÁER number itself!
- **EKÁER number:** a number generated and provided based on data sent to the system of the National Tax and Customs Administration. It is the official serial number of the EKÁER notification.
- **Direction of trade: Chapter 6.4.2 provides detailed information about it**
 - From Domestic to Domestic
 - From Community to Domestic
 - From Domestic to Community
- **Notifier ID:** it is filled in automatically after the EKÁER notification. It is the EKÁER system ID of the user making the actual notification and sending the data.
- **EKÁER status:** another automatic field that changes according to the status of the notification in the system of the National Tax and Customs Administration (Active, Closed, Cancelled). For detailed information please read **Chapter 5.2.2.**
- **Available risk assurance:** remaining available amount within the specified risk assurance limit
- **EKÁER notification necessary:** based on the data entered and previous settings, the system tells whether a notification is necessary.
Note that this is only a suggestion that the user can override. The system gives the suggestion based on previous settings.
For instance, for non-toll vehicles where the transport is around the limit in terms of value or weight, you can notify the transport despite the suggestion of the system. (Practice shows that a business would rather request an EKÁER number in such cases.)
- **Start of EKÁER validity:** starting date of the received EKÁER number (notification)
- **End of EKÁER validity:** last date of the validity period of the received EKÁER number
- **Transport weight:** the (gross) transport weight calculated on the basis of the data entered
- **Transport amount:** total transport value in HUF calculated on the basis of the data entered

It might happen that not only the transport weight, but the transport value also justifies the EKÁER notification. If this is the case, please consider that the product value should be considered in HUF currency for EKÁER purposes, even if the relevant order is issued in EUR or any other currency for both export and import transports.

According to the EKÁER rules (*Paragraph (5) of Section 17 of Decree No. 5/2015. (II. 27.) NGM*), the conversion should be made using the official foreign exchange rate issued by the MNB for 31 December of the previous year.

- **Risky weight of transport:** weight of products that are considered risky in the transport
- **Risky amount of transport:** value of products that are considered risky in the transport

41 Direction of trade

In terms of shipment direction, there are three types of EKÁER notifications:

- From Domestic to Domestic (inside Hungary)
- From Domestic to Community relation (export → from Hungary into an EU Member State)

- From Community to Domestic (import → from an EU Member State to Hungary)

Based on the entered address data, Business Central offers a direction; you can, however, change this manually on the document before sending the data to the EKÁER system.

If necessary and you wish to override the type suggested by the system, select the relevant variant from the drop-down list.

42 Consignor and Consignee data

Consignor and Consignee data are loaded automatically. (...)

All that is determined by the source document; for instance, if the starting point is a Posted sales shipment, the Consignor will be the company in the system (own company), and the consignee will be the buyer on the shipment.

The addresses of the Consignor and the Consignee will always be the registered addresses; needless to say, the Loading and Unloading Places may be different.

Basic principle:

The address data of EKÁER documents are always loaded from the transports.

Address data of purchase transports:

- Consignor:
Consignor data are not mandatory for transports.
 - If you do not fill it in, you can prepare a groupage shipment as mentioned in the foregoing. If you record a groupage shipment, Consignor data on the EKÁER documents generated from the transport in question will always be taken from the lines of the relevant transport. In that case you should use the detailed address data of the Pay-to address ID of the Vendor indicated on the source document (e.g. purchase order).
 - If you select a Vendor in the Consignor code field of the Purchase transport, the Module will use the detailed address data of the Pay-to address ID of the relevant Vendor.
- Consignee: data of the own company that the Module takes from the data available in the Company information menu
- Loading place:
 - if the source document (e.g. purchase order) has an Order address ID, then it is the detailed address data pertaining to the Order address ID
 - if you do not use an Order address ID, then it will be identical to the detailed address data of the Pay-to address ID pertaining to the Vendor

- Unloading place: it is the detailed address data on the Warehouse card of the warehouse indicated on the source document

Address data of sales transports:

- Consignor: data of the own company that the Module takes from the data available in the Company information menu
- Consignee:
 - Consignee data are not mandatory for transports.
 - If you do not fill it in, you can prepare a groupage shipment. In that case, the Module will take Consignee data for the EKÁER documents from the detailed address data in the Bill-to address ID of the Customers of the source documents belonging to the transport lines.
 - If you fill it in, then you will use the detailed address data belonging to the Bill-to address ID of the selected customer.
- Loading place: the detailed address data pertaining to the warehouse selected on the source document.
- Unloading place:
 - if the source document (e.g. sales order) had a ship-to address ID, then the Unloading place will be the detailed address data belonging to it
 - if you do not use the ship-to address ID, then it will be identical to the detailed address data belonging to the Bill-to address ID of the Customer

43 Transporter data

- **Modification by forwarder:** you can let the transporter modify the data provided in the notification
 In that case, you need to provide the **Forwarder code** (select it from the Vendors list), the system will then fill in its description. Modifications require the **EKÁER ID of the Forwarder**. All this needs to be provided in the transport! Data taken from the transport will be recorded on the EKÁER document.

The Module takes the following data also from the transport. If modification is needed, you can do that in the transport window:

- **Vehicle plate number**
- **Vehicle nationality mark**
- **Vehicle total weight (kg)**
- **Vehicle subject to toll**
- **Vehicle 2 plate number**
- **Vehicle 2 nationality mark**

44 EKÁER lines

(If the number of columns you can see is not enough, you can add/remove and sort columns with the → Select columns menu that you can open with a right click on the column head.)

The EKÁER document lines are generated from the lines of the relevant transport. You cannot directly modify the lines of the EKÁER document, the modification needs to be carried out in the transport itself.

There are only two pieces of information that you can provide directly on the EKÁER lines:

- Load-to-Date
- Unload-to-Date

When modifying the transport, the “Process EKÁER document” function will also update both the relevant EKÁER document and its lines.

45 EKÁER number requesting

Click on the “Send” button on the ribbon of the prepared EKÁER document. The system will then return a message based on the data sent in.

- If data are correct and the data connection is sufficient, the EKÁER status will change to Active and the Document status will become Notified – Confirmed.
- If the notification is unsuccessful or produces an error, the EKÁER status will remain Draft and the Document status will be Notified – Unsuccessful.

The received EKÁER number will appear in the EKÁER number field of the document, the relevant validity interval will be shown in the Start date of the EKÁER validity period and the End date of the EKÁER validity period fields.

46 Modification, deletion of EKÁER notifications

47 Modification of EKÁER notifications

48 Modification of EKÁER data in “Draft” status

As long as the EKÁER document has the “Draft” status, you do not have an active notification on the NTCA website, so you can make modifications.

49 “Active” EKÁER notification

Process:

1. **The starting point is always the Transport** which you can edit after changing its status to Draft. To set the status to “Draft”, press the “Planning” button in the top ribbon.
2. After making the modifications, press the “Process EKÁER documents” button to update the data on all relevant EKÁER documents.

3. After updating the EKÁER documents, open the relevant EKÁER documents and send the modifications to the NTCA by pressing the “Send” button.
Provide your reasons for the modification, if necessary, in the pop-up window.

If the process has been successful, the Document status field of the EKÁER document will change to “Modified - Confirmed”.

You can make the following modifications:

I. You need to make the necessary modifications on the transport.

Directly:

- Lines (cargo data):
 - Gross weight
- Plate number, nationality mark
- Loading address data
- Unloading address data

Indirectly:

e.g. due to the modification of the warehouse shipment: the quantity, the gross weight and the value may modify

II. You can provide *some* data on the EKÁER document as well, they are the following. (It is considered a technical modification.):

- Load-to-Date
- Unload-to-Date

50 EKÁER notification cancellation

51 EKÁER notification cancellation in “Draft” status

If the EKÁER notification’s status is still only “Draft”, i.e. data to be notified have been prepared for a later transport, but the EKÁER number has not been requested yet, then data get archived and the status changes to “Cancelled” after you delete it.

In that case this move is not reflected on the NTCA’s EKÁER page and no reasoning is necessary.

Use the Delete button in the list view or on the EKÁER document card.

52 EKÁER notification cancellation in “Active” status

If the status of the EKÁER notification is “Active” in the system of the National Tax and Customs Administration, i.e. the notification has already received an EKÁER number, then you cannot do any deletion in the module.

Practice shows that notifications need to be deleted relatively rarely; in that case, you can delete the EKÁER number requested and received in the conventional way, i.e. by entering the user interface.

53 EKÁER notification closing

The EKÁER number provided by the National Tax and Customs Administration is valid for 15 days. After the cargo arrives, the user is responsible for closing the Active notification and for providing unloading data.

After the closing, you cannot modify the EKÁER notification any more; it is, therefore, important that you act with caution and do the closing only if you do not need the EKÁER number any more and the goods have arrived.

In case of imports (from Community to Domestic) and domestic transactions (from Domestic to Domestic), the notifier must close the notification still within the 15 days validity period. If the user fails to do this, the EKÁER system sets the document status to closed at the end of the validity period; this may, however, result in fines as well. In the two cases above, you must always ensure that **the user closes the notification on the third working day following the unloading at the latest.**

Needless to say, **Decree No. 5/2015. (II. 27.) NGM** provides detailed description in this regard.

EKÁER document closing:

1. Open the card of the EKÁER document
2. Enter the unloading date for each line. (the day is sufficient, that is what will be sent)
Hint: You can copy the information from the above field with button F8.
3. Submit the modification with the Send button. No reasoning is necessary, click on the "OK" button.
4. If the EKÁER status is Active and the Document status is Modified - Confirmed (i.e. the EKÁER notification has been modified successfully with the Unloading date), then the document may be closed.
5. Use the **Finalize** button on the top ribbon for closing.
6. After the successful finalization, the EKÁER status will be closed and the Document status will

be Closed - Confirmed.

You cannot modify an EKÁER notification with Closed status, the “Send” and “Finalize” buttons become inactive.

The EKÁER document now stays in the active list, we will mention archiving in a subsequent chapter.

54 EKÁER documents report

Use the Departments/Transport/Documents/EKÁER documents report to list the EKÁER documents in the system.

Users have filter option in the bottom part of the report window for various criteria.

Image of the generated report:

Information:

- Document number (serial number of the EKÁER document in Business Central)
- EKÁER status
- Direction of Trade
- Loading dates
- Document status
- Start date of EKÁER validity period
- End date of EKÁER validity period
- Expired X days ago

55 Special case: Warehouse shipment as source document

You can select a Warehouse shipment as source document for Sales transports. Warehouse shipments have, however, not only the process presented so far, but also an updating function that can simplify the release from warehouse process and the related EKÁER administration.

Process:

1. You have a Warehouse shipment that you wish to use for EKÁER notification.

2. Make a Sales transport for which you select the Sales order lines of the Warehouse shipment.

3. Make an active EKÁER document and submit it to have an active EKÁER number.

4. Many businesses do Picking for Warehouse shipments. The transport quantity becomes clear after Picking registration.
The fields with Transport quantities of the Warehouse shipment get updated; therefore, it is necessary to update the existing Transport and EKÁER document for a shipment that has an active EKÁER number (because, for instance, data were submitted a few hours before the departure, but the transport quantities were changed in the meantime).

The Warehouse shipment lines show the serial number of the relevant transport document and also the EKÁER number, if there is an active EKÁER notification.

If a Warehouse shipment has an EKÁER document with EKÁER number, then you cannot change the content of the Warehouse shipment, i.e. you cannot add new lines to it.

5. After specifying the Transport quantity, update the relevant Sales transport information by pressing the “Update EKÁER data” button on the top ribbon of the Warehouse shipment.

6. The Sales transport opens, and information get updated.

7. You can access EKÁER documents related to the Sales transport via the “Process EKÁER data” function.

8. Do not forget to send in the modifications!

9. Note that if the quantity on the documents has changed, then it will change the weight and value; therefore, you need to fill in the right reasoning fields when submitting the modification.

10. Data are updated successfully if the Document status of the EKÁER document becomes “Modified - Confirmed”.

If you make any errors somewhere in the process, data and your modification is unsuccessful, you can check the reasons, error codes in the Change log entries.

56 Archive documents

57 Archiving

You can archive transports and the relevant EKÁER documents.

You can start archiving from the Transport card and perform it only if all the relevant EKÁER notifications have been closed or deleted. The transport status changes to “Completed”.

1. Open the transport card. You can start the archiving if the Status is Completed.
2. You can access the archiving function on the top ribbon of the transport data sheet.
3. You need to provide a short reasoning for the archiving in the window below.

Read Chapter 8.2 to learn how to access the documents.

58 Access to archived documents

You can access each category of archived documents from the Departments/Transport/History menu.

You can search among the previous Purchase/Sales/Other transports and the EKÁER documents.