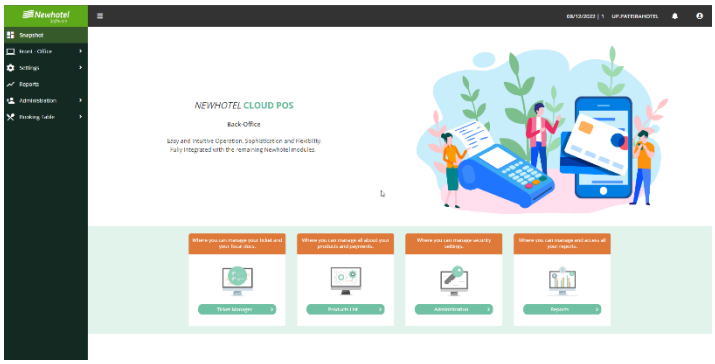

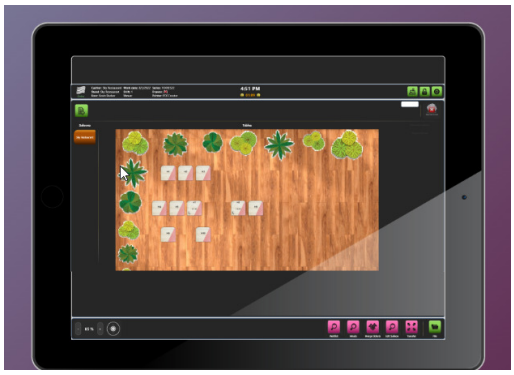

Report card Nº: 2025.27

Subject: Mandatory Procedures before the End of the Year

Procedures for creating document series and unique document code (ATCUD) for POS

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POS (Point of Sales)

For ***customers in Portugal***, the new ordinance nº195/2020, of August 13, which regulates the obligations related to the processing of invoices and other fiscally relevant documents, referring to the requirements for creating the two-dimensional barcode and the document's unique code (ATCUD), provides for the ***obligation to communicate a series of invoices*** 15 days in advance, by the customer on the AT portal (manual) and wait for the validation code to be sent (ATCUD) or alternatively proceed by requesting the code via web services.

https://info.portaldasfinancas.gov.pt/pt/informacao_fiscal/legislacao/diplomas_legislativos/Documents/Portaria_195_2020.pdf

This validation code must be placed in each series communicated to AT (Tax Authority).

The series are as follows:

- Table Consultation;

- Cash invoice;

- Credit Note - Money;

- Tickets;

There may be other examples that are not mentioned here, we advise our customers that an individual ATCUD code must be obtained for each of the series created.

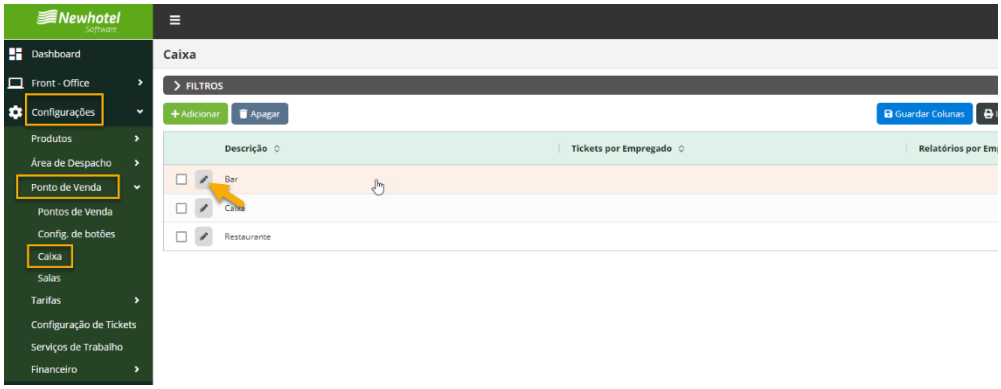
For more details on obtaining validation codes, contact your accounting department.

We recommend that you carry out **today** (if you have not already done so) the following 2 procedures that are necessary for the software to function correctly during the year change.

Creation of Tax Series

If you have not yet created the series for the next year, before the end of the current year you must create the new series for the following year and insert the unique document code (ATCUD) returned by the AT manually or obtain the same via web services.

To do this, go to the left side menu, ***Settings> Point of Sale> Cashier>*** Edit cashier. Must be done cashier by cashier (Bar, Restaurant, etc.).



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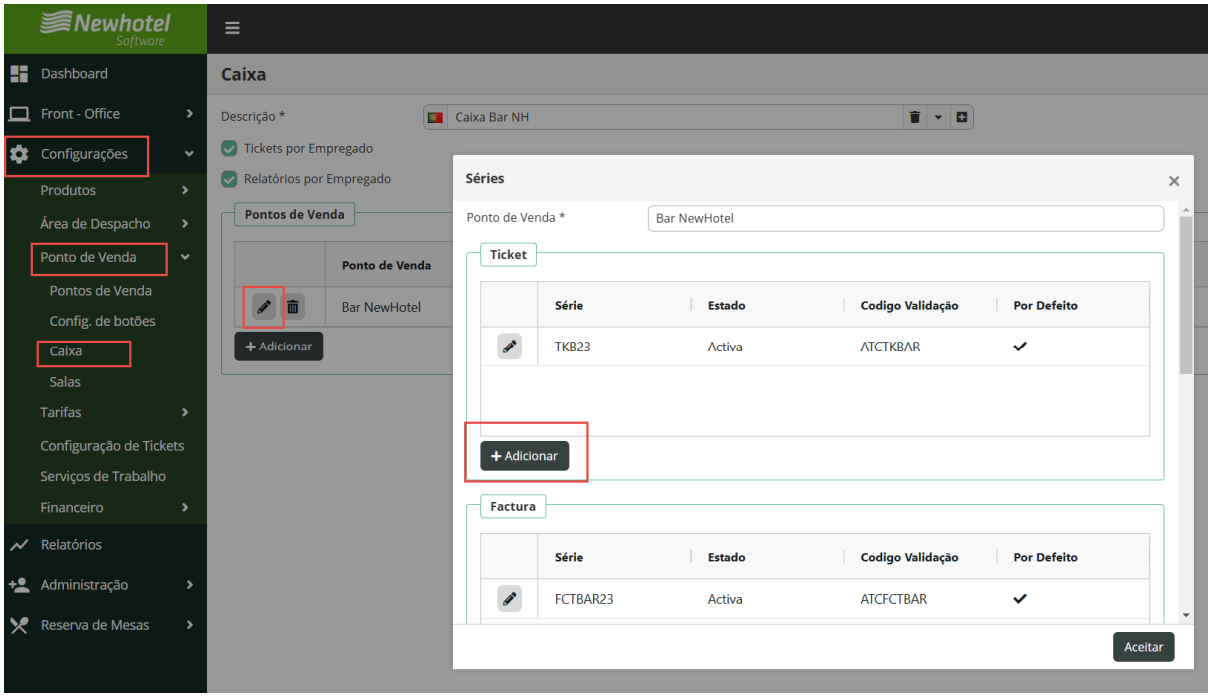
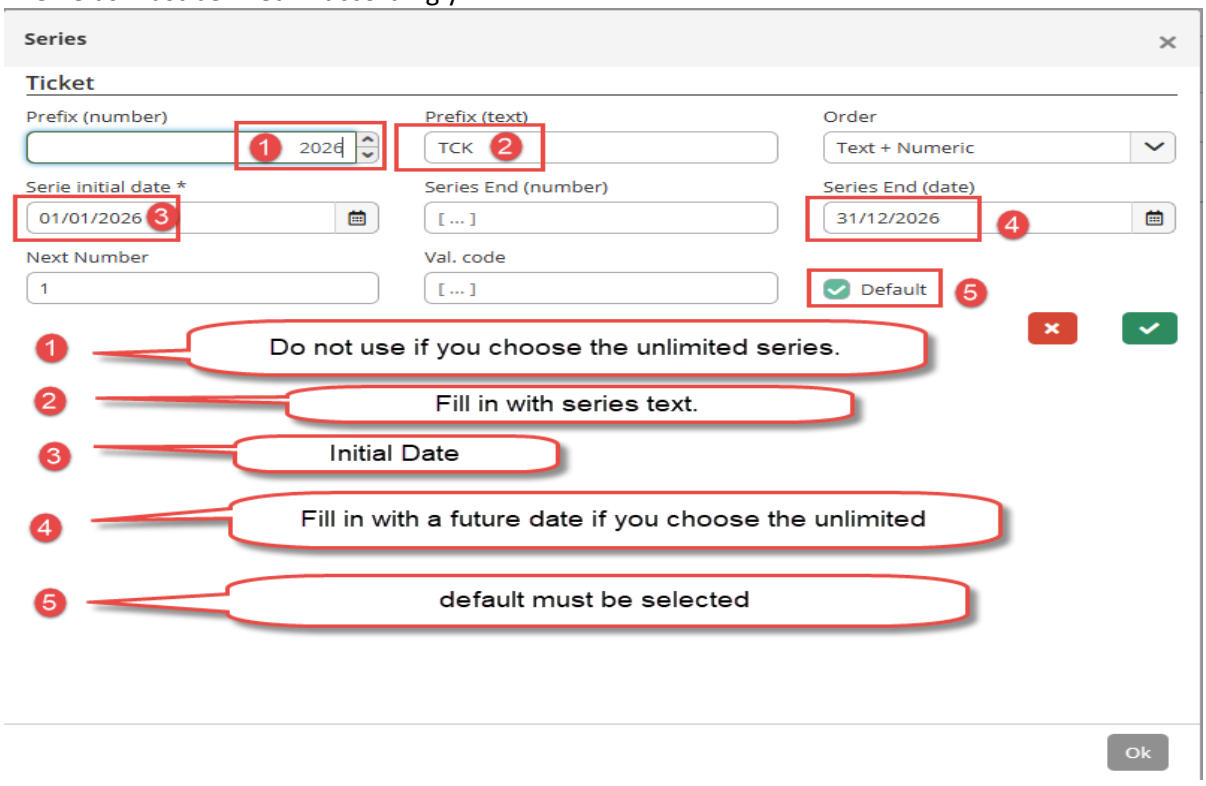
Inside the box, choose <Add> to insert the new series per point of sale for the various Document Types:



The series window defined at each point of sale will appear. To create the series, click on the pencil sign.
You must carry out the procedure individually for each desired document (Ticket, Invoice, Credit Note).

The fields must be filled in accordingly:



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Prefix (number) – prefix number of the series you want to create
Prefix (Text) – prefix text of the series you want to create
Order – the order in which you want to display the prefixes
Final Series (number) – if you want the series to end on a number (as a rule it is not filled in)
Final Series (Date) – End date of the series you want to create
Series start date - Start date of the series you want to create
Next Number - Starting number of the series created

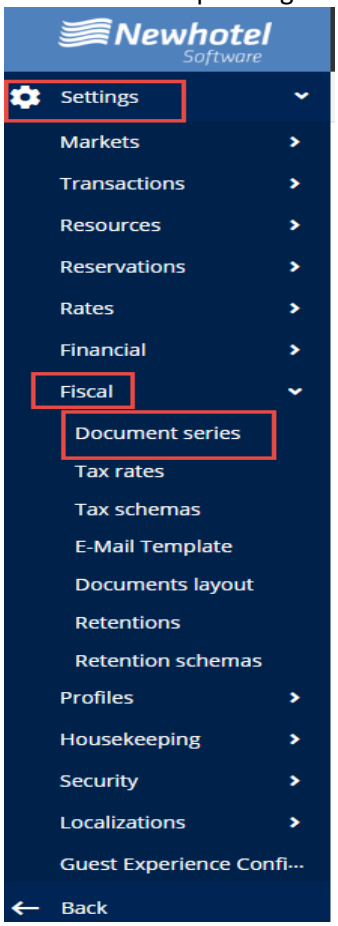
After filling in the necessary fields, it must be validated by pressing the button with the green symbol and finalizing by pressing "***Accept***".

If you do not yet have the validation code, you must make the request to the tax authority manually or through a web service as quickly as possible and before issuing the first invoice in the corresponding series.

Insertion of unique document code (ATCUD)

There are two ways to enter series codes after their creation, either manually or via web services. These procedures will have to be carried out in the PMS similar to the operation carried out for the invoice series of your property.

Manual shape insertion:
After creating the series and as soon as you receive the validation code for the series communicated to AT, you must go to the left side menu, ***Settings > Tax > Series of documents***, select each series and enter the corresponding validation code in the fields shown below.;



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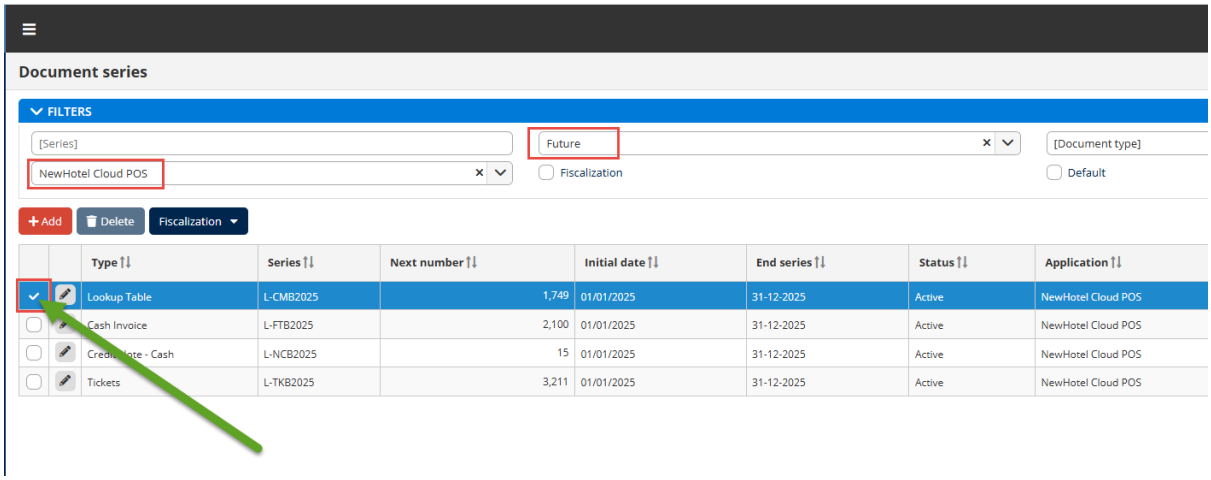
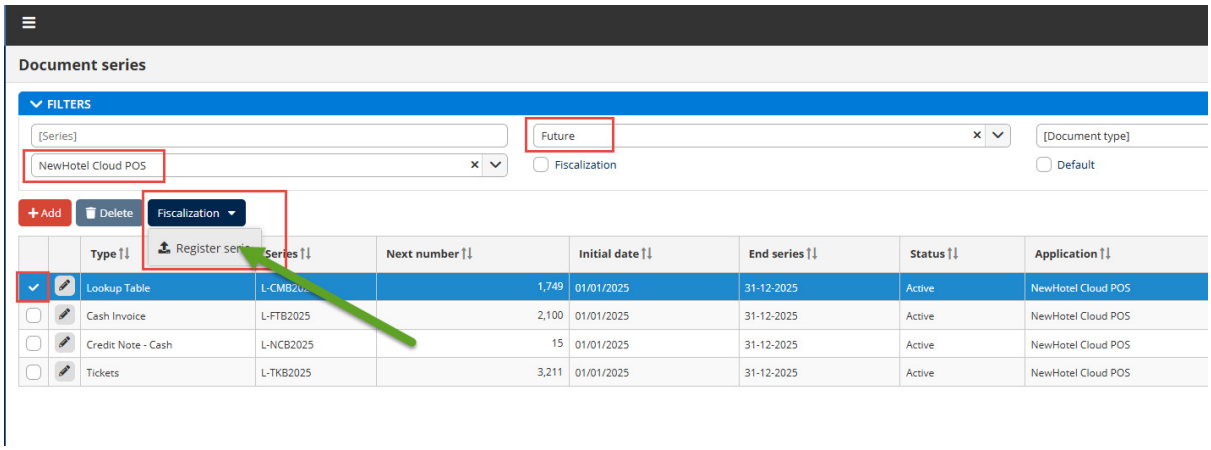
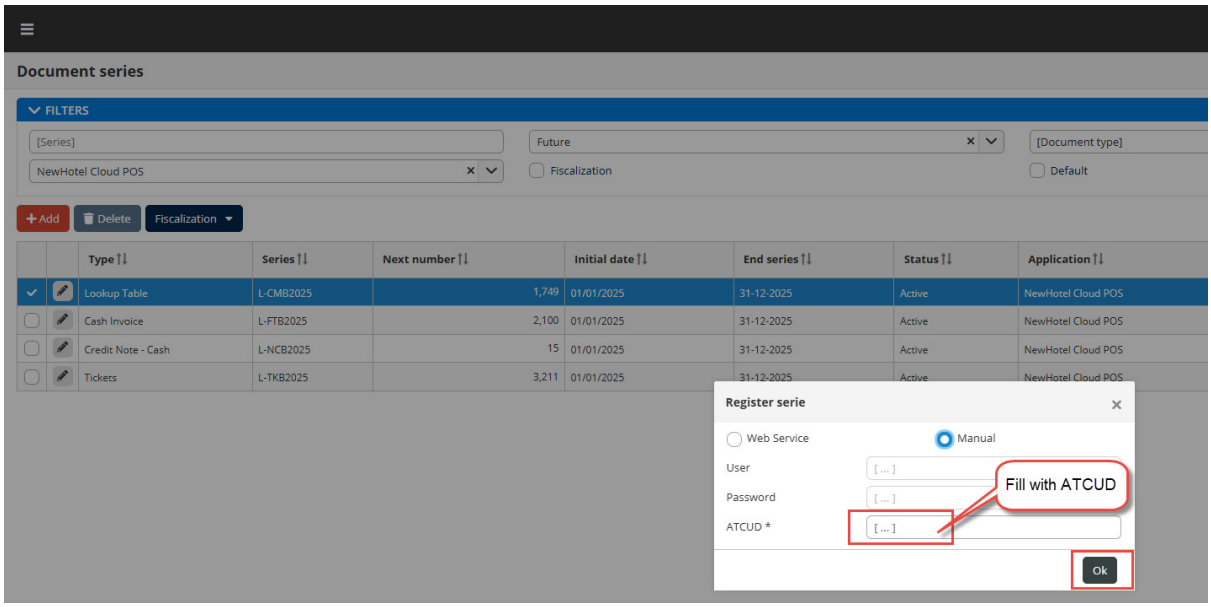
In the filter you must select by FUTURE series and select the series:



In each series, place the validation code sent by AT:





To finalize the changes, select "**Ok**".

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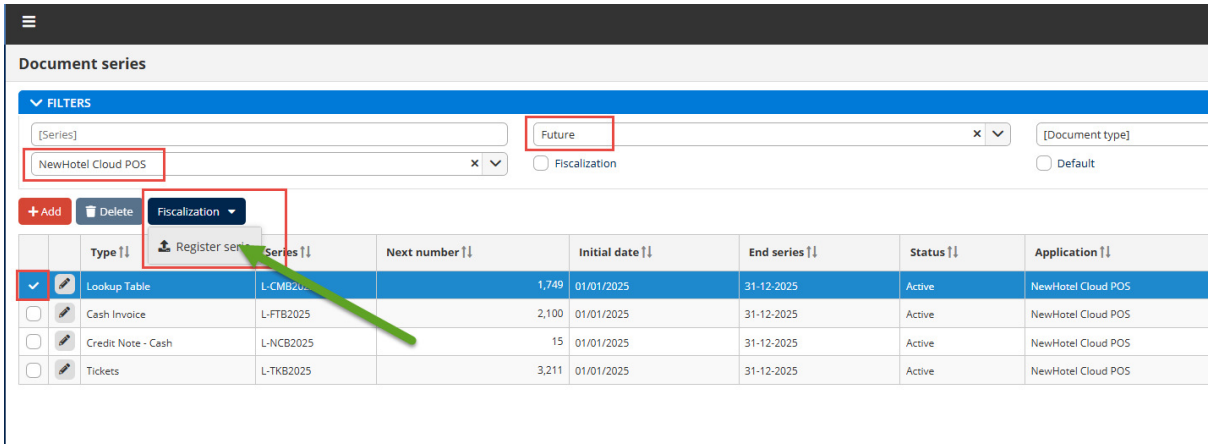
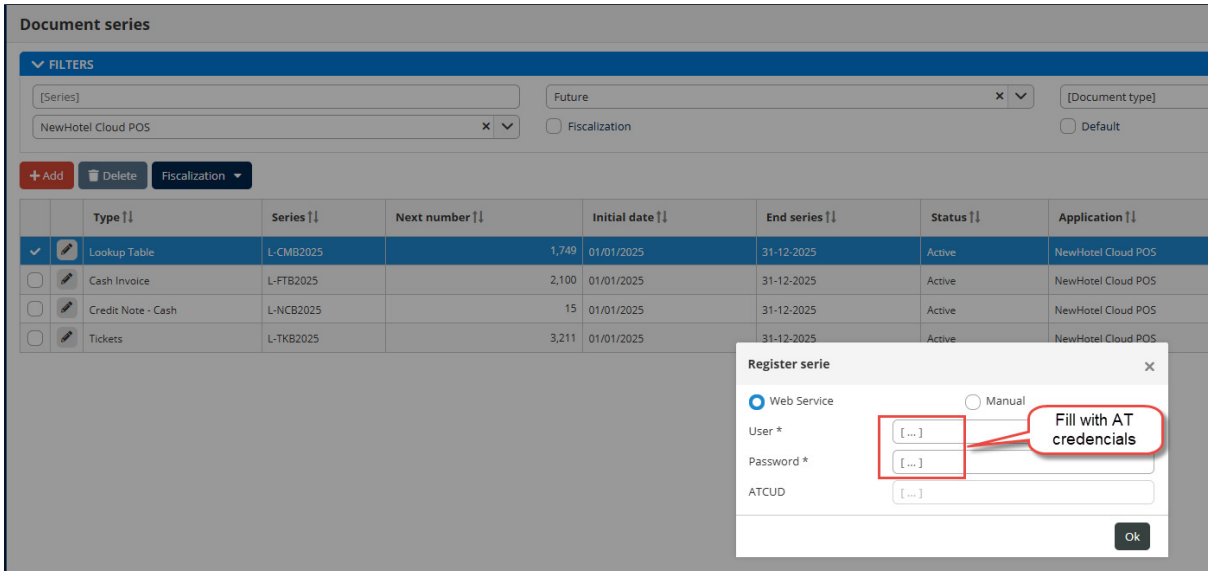
Insertion via WebServices:
After creating the series, go to the left side menu, ***Settings > Tax > Series of documents***, select each series and enter the user code and respective password previously created on the AT website as shown:





NOTA: For more information on how to create a user and respective password to obtain codes via webservices, please consult the additional information in this bulletin.

If you have any questions, contact the NewHotel Helpdesk, available 24 hours a day.

Additional Information:

- **For more information about ATCUD, what it is and what it is for, please see the link** Outras Obrigações > Séries/ATCUD > Âmbito de Aplicação (portaldasfinancas.gov.pt) where you can find detailed information on the topic.

- **How to proceed on the AT website to create a user to obtain codes via webservices:**

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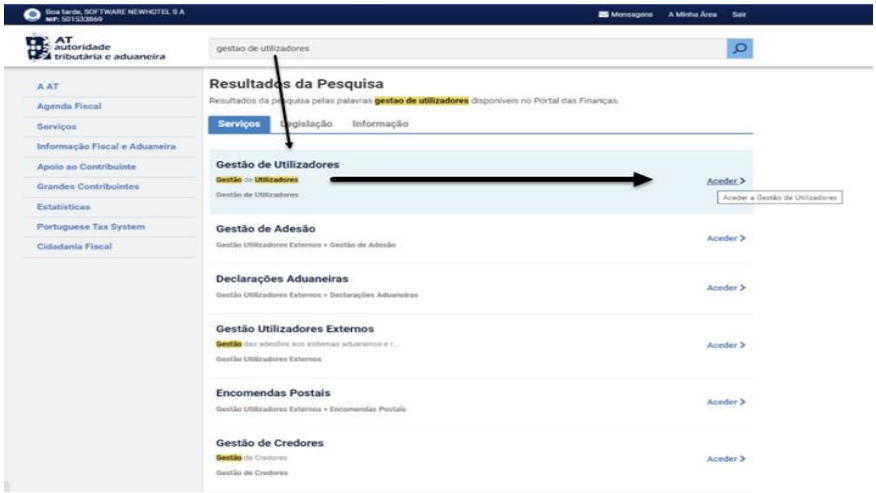
1. You must access the AT website at [Portal das Finanças (portaldasfinancas.gov.pt)]

2. Enter your access credentials

3. You should search for "*User Management*" in the search bar:



4. When creating the user, assign the indicated permission depending on the type of automatic communication WSE (via web series) and/or manually CGS

WSE – Communication and Management of Web Series

CGS – Communication and Series Management

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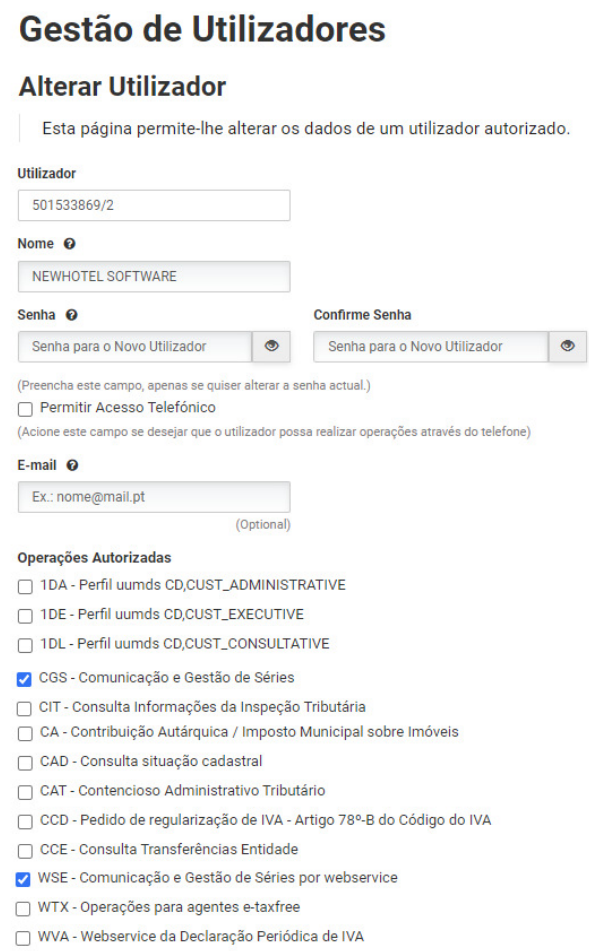

After creating the user in question, you can enter the data in the fields described in the example of creating a series via the webservices of your billing system.

- **How to proceed on the AT website to obtain document series codes:**

1. You must access the AT website at [Portal das Finanças (portaldasfinancas.gov.pt)]

2. Enter your access credentials

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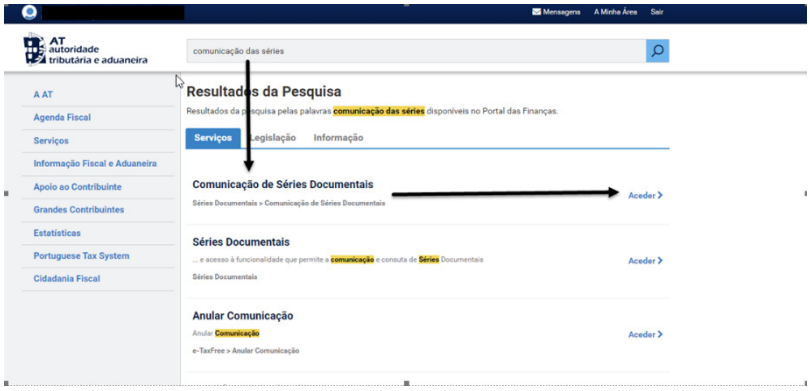
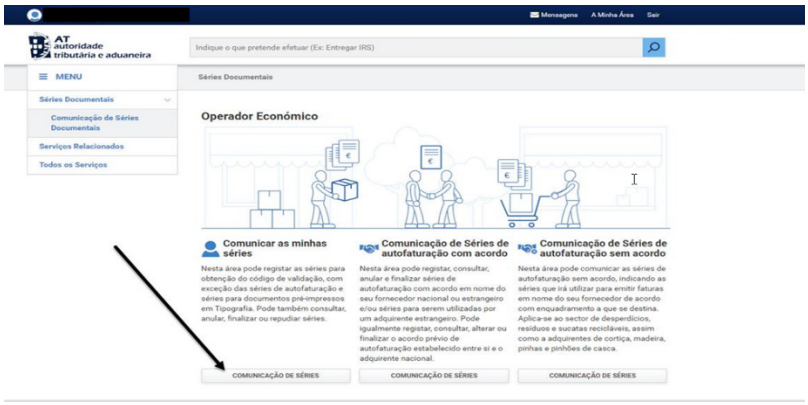
3. In the search field, enter ***"Documentary Series Communication"***



4. Select the **"*Series Communication*"** field:



5. Select the ***"Register Series"*** field:

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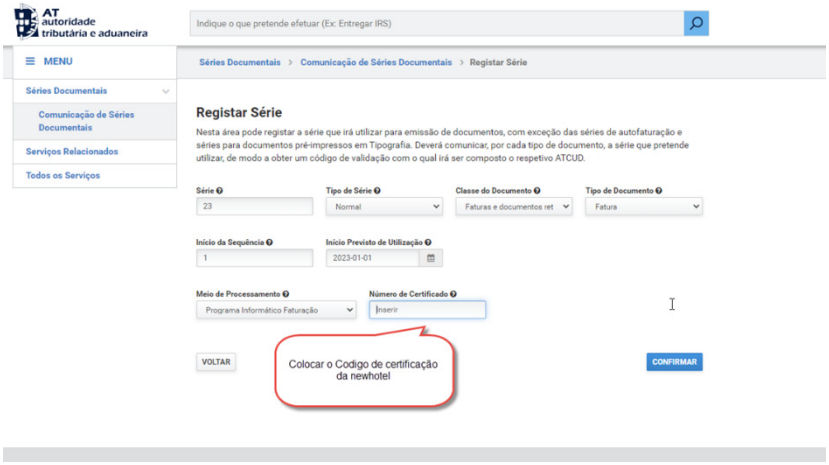
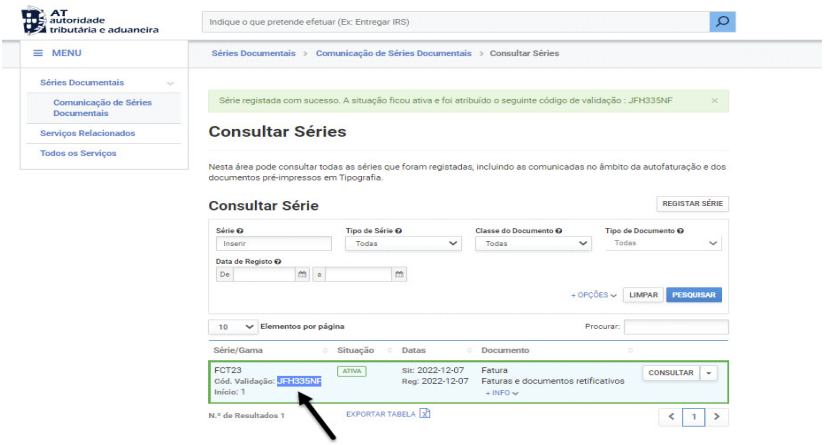
6. Proceed with filling in the necessary fields accordingly:



NOTE – NewHotel's certification code can be found at the foot of invoices currently issued, which in the case of CLOUD applications is **1437**.

7. After confirmation by AT of the series registration, a code will be generated that can be consulted in this field



If you have any doubts about filling in the fields when registering the series of documents to be carried out, we recommend that you contact your accountant or the person responsible for your company's accounting.

If you have any questions, contact the NewHotel Helpdesk, available 24 hours a day.

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