



# fiskaly Dashboard & Management API

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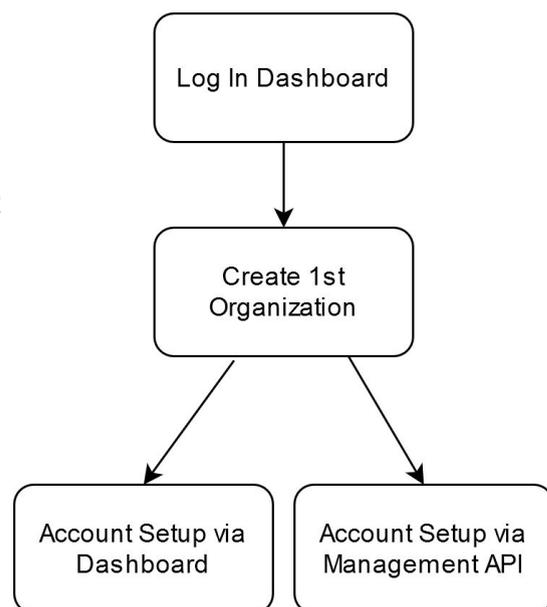
## fiskaly Dashboard

The fiskaly Dashboard gives you insight into your booked products at fiskaly. Via the dashboard you can create and manage organizations and user profiles, get insights into your transactions, created clients, and technical security devices (TSS). It visualizes your data and gives you an overview of what is happening in the fiskaly system.

### Free Registration at fiskaly Dashboard

To use the fiskaly Dashboard you need a separate account. You can sign up for a test account at fiskaly for free. All organizations that you create in the test account can go live after you signed a contract with fiskaly. Click here to go to the dashboard: <https://dashboard.fiskaly.com/>

Info: An organization must be created the first time you log in. Then, you have the option to create your organizations and managed organization via the dashboard or via the Management API.



### fiskaly Dashboard Manual

The detailed manual for the dashboard is available on the fiskaly website for developers.

<https://developer.fiskaly.com/en/docs/guides/dashboard>

## Management API

Via the Management API you can use all functions of the dashboard programmatically. Only the first organization must be created via the dashboard. The detailed documentation of the interface with their functions can be found on the fiskaly website for developers.

<https://developer.fiskaly.com/api/management/v0/>

! In the Management API the term organization is used for main organizations and managed organization for sub-organizations.

## Organizations and User Authorizations

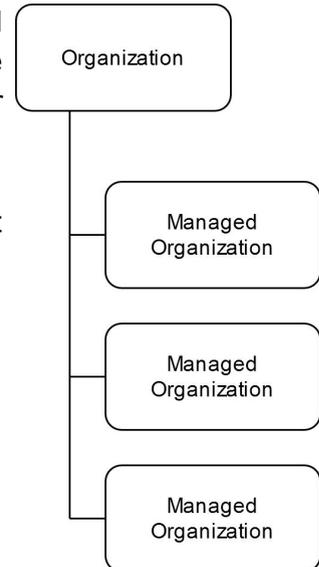
The fiskaly system distinguishes between organizations and managed organizations. The following describes the difference between the two organizational forms and the effects on user permissions.

On the fiskaly developer website you find all information about organizations here:

<https://developer.fiskaly.com/api/management/v0/#tag/Organizations>

Or in the Dashboard User Manual with this link:

<https://developer.fiskaly.com/en/docs/guides/dashboard#organization-management>



### What is an Organization?

An organization is a significant unit in the fiskaly system. It usually represents a holding, business or branch office. Organizations can be created free of charge via the dashboard. Managed organizations can be attached to it and can be administered through the parent organization.

In the menu item *organization management* you can create more organizations, have access to information, switch to live mode, add a logo to your organization, organize user authorizations, create API keys for your organization and create API keys for your managed organizations.

An organization cannot be a managed organization of another organization!

### User Authorizations in the Organization

Users of the organization, and persons invited to the organization, have access to all information displayed in the dashboard of the organization and all the information of the attached managed organization(s) of this parent organization. I.e. overview of the dashboard, TSS number(s), client(s), transactions, exports, integrations etc. are displayed to the user.

#### User Authorizations:

- TSE
- Clients
- Transactions
- Exports
- Integrations (Archive)
- Organization Management
- User Administration
- Signature & Transaction monitoring
- Billing



## What is a Managed Organization?

A managed organization is dependent on its parent organization and can never be used on its own. It must always be secondary to an organization. Managed organizations are marked with the badge "**managed**". They can also be created via the dashboard.

### User Authorizations in a Managed Organization

Users who are authorized for a managed organisation have only access to the information of the respective managed organization. These users have no access to information of the parent organization. Within a managed organization, users have access to the dashboard and all information stored there.

### How do I Create a Managed Organization?

In the **Dashboard** under menu item *Settings > Organization Management*, click on the button *Create New Organization* and select the checkbox *Create Managed Organization*. Then select which organization this managed organization is secondary to.

The following link shows how to create the managed organization using the **Management API**:

<https://developer.fiskaly.com/api/management/v0/#operation/createOrganization>

Make sure to check the box *Create Managed Organization*.

## Difference Between an Organization and a Managed Organization

The fiskaly system distinguishes between organizations and managed organizations. Managed organizations are dependent on the parent organization and cannot contain any further managed organizations themselves. An organization cannot be a managed organization of another organization. Note that the user authorizations of organizations and managed organizations differ.

### Difference in User Authorizations in Organizations and Managed Organizations

Users of organizations or managed organizations have access to the information of the respective (managed) organization displayed in the dashboard. User authorizations within organizations and managed organizations differ in that users of organizations also have

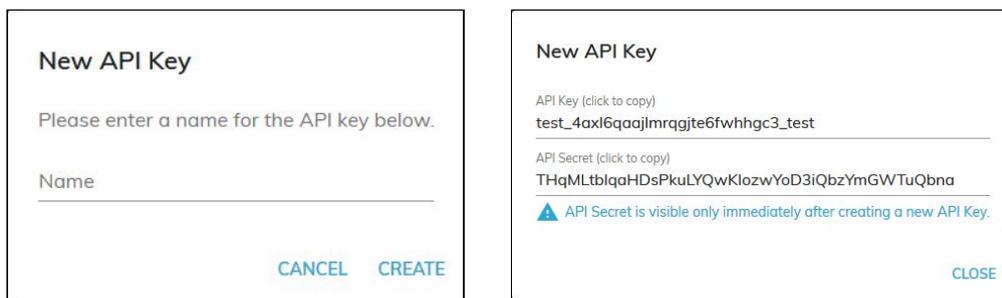
access to the information of the respective connected managed organizations. However, users of managed organizations do not have access to the information of the parent organization.

## API Keys

At least one API key must be created at the organizational level.

Via the dashboard in the menu item *Developers* > *API Key* click on the button *Create API Key* and choose a name for your new API Key. Then select *Create*.

**Attention!** The API Secret is only displayed immediately after the creation of a new API Key!



The image shows two screenshots of a 'New API Key' dialog box. The left screenshot shows the dialog with the title 'New API Key' and the instruction 'Please enter a name for the API key below.' Below this is a text input field labeled 'Name' and two buttons at the bottom: 'CANCEL' and 'CREATE'. The right screenshot shows the dialog after the key has been created. It displays the 'API Key (click to copy)' as 'test\_4axl6qaajlrmrqjite6fwhhgc3\_test' and the 'API Secret (click to copy)' as 'THqMLtblqaHDsPkuLYQwKlozwYoD3iQbzYmGWuQbna'. A warning icon (a triangle with an exclamation mark) is shown next to the text 'API Secret is visible only immediately after creating a new API Key.' and a 'CLOSE' button is at the bottom right.

API Keys can also be created via the Management API:

<https://developer.fiskaly.com/api/management/v0/#operation/createApiKey>

With the API key of an organization, the managed organizations can be administered. A separate API key must be created for each managed organization in order to create a TSS for it and to use the other functionalities of the fiskaly SIGN API.

API keys for organizations must be generated via the dashboard or the management API. For managed organizations API keys can be generated automatically.

An API Key is bound to an organization and to the selected mode (Test/Live). Therefore each API Key can only be used for its own organization. Exception: API Keys of an organization can be used for the related managed organizations.

If the API key was created in test mode, entities can be created **only(!)** for test purposes. With a key created in live mode, **only(!)** live entities can be produced. I.e. in a live

organization further managed organizations can be created with the Live API Key, so it is not necessary to go live with each managed organization.



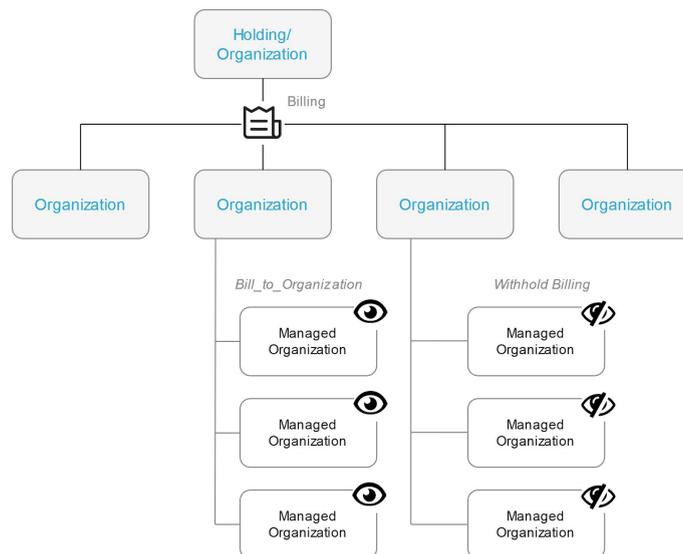
On the fiskaly developer website all information about the API Keys can be found: <https://developer.fiskaly.com/api/management/v0/#tag/API-Keys>

## Billing Options

There are two ways to set up the billing options:

### Bill\_to\_Organization

The option *Bill\_to\_Organization* sends the invoice to the organization and can also be viewed via the dashboard.



### Withhold Billing

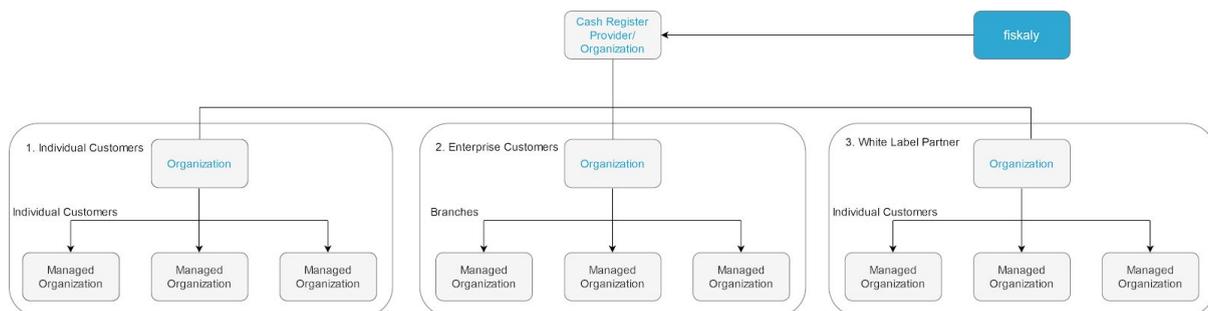
If the option *Withhold Billing* is selected, the invoice is not sent to this managed organization and cannot be viewed from the dashboard. For example, the fiskaly TSS can be sold as part of a POS package without your customer seeing the price of the fiskaly TSS.

On the fiskaly developer Website, all information about billing options can be found: <https://developer.fiskaly.com/api/management/v0/#operation/createBillingAddress>

# Organizational Structure

## POS Manufacturer Offers fiskaly Cloud TSS in its Portfolio

A POS manufacturer uses the fiskaly Cloud TSS for its POS software. They offer three solutions to their customers. Point 1 is a typical best practice for large POS providers. Points 2 and 3 are designed for more complex models. Please contact our sales team: [sales@fiskaly.com](mailto:sales@fiskaly.com).



### 1. Individual Customers - Best Practice

Under the main organization of the POS manufacturer, individual customers are created and administered as managed organizations. The API key of the managed organisation is created via the main organization. The billing option was set to *Withhold Billing*, because the price of the fiskaly Cloud TSS is included in the total invoice of the POS manufacturer to its customer.

### 2. Enterprise Customers

The cash register manufacturer creates an organization for the holding of the enterprise customer. The branches of the Enterprise Customer are created as managed organizations. The organization of the Enterprise Customer is created with the API key of the organization of the POS manufacturer. It is up to the POS manufacturer to decide whether the Enterprise Customer manages its own organizations or whether it is managed by the POS provider. The billing options are set to *Withhold Billing* for the organizations of the Enterprise Customer.

### 3. White Label Partner

The cash register manufacturer creates an organization for the White Label Partner. The White Label Partner's customers are organized as managed organizations. The organization of the White Label Partner is created by the API key of the main organization of the POS manufacturer. The White Label Partner manages his customers (managed organizations) on its own. The billing options are set to *Withhold Billing* for the organizations of the White Label Partner.

For other models or special cases please contact our sales team: [sales@fiskaly.com](mailto:sales@fiskaly.com).