



Allocating Invoices on the e-Fatura Portal

A STEP-BY-STEP GUIDE FOR INDIVIDUALS CLAIMING TAX DEDUCTIONS ON THEIR ANNUAL INCOME TAX RETURN

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tax deduction categories

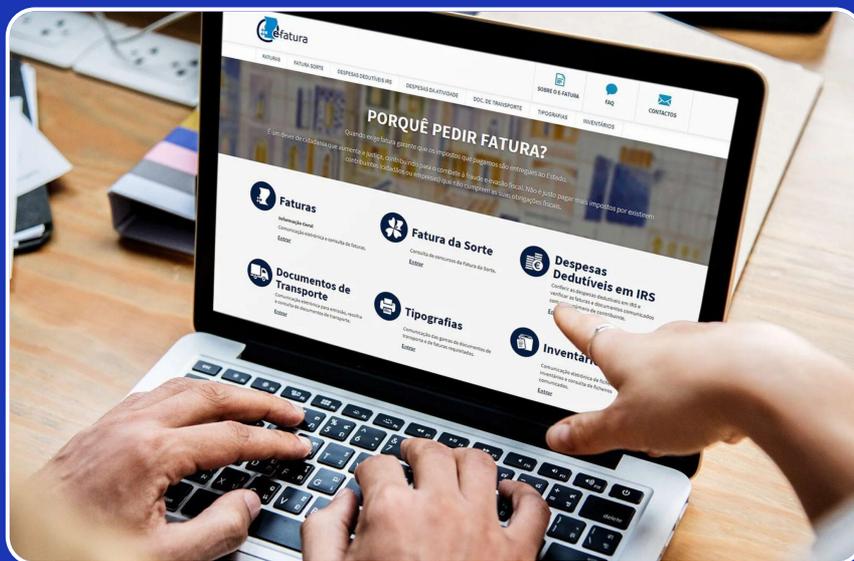
Here are the main tax deduction categories individuals are entitled to:

<p>General Family Expenses</p> <ul style="list-style-type: none"> • Everyday purchases (supermarkets, clothing, utilities, etc.) <p>Deduction:</p> <ul style="list-style-type: none"> • 35% of expenses • Annual cap: about €250 per person (or €500 per household). 	<p>Healthcare Expenses</p> <ul style="list-style-type: none"> • Doctor visits • Hospital bills • Prescription medicines • Health insurance (partially) <p>Deduction:</p> <ul style="list-style-type: none"> • 15% of expenses • Cap: about €1,000 	<p>Education and Training</p> <ul style="list-style-type: none"> • School fees • University tuition • Books and educational materials • Student accommodation (some cases) <p>Deduction:</p> <ul style="list-style-type: none"> • 30% of expenses • Cap: about €800 	<p>Housing Expenses</p> <ul style="list-style-type: none"> • For people renting property - only rent payments registered with tax authority <p>Deduction:</p> <ul style="list-style-type: none"> • 15% of rent • Cap: about €600 <p>(Home loan interest deductions only apply to older mortgages taken before certain years.)</p>
<p>Restaurants, Car Repairs, Hairdressers, Gyms & Vets</p> <p>These are included under sectors where VAT deductions apply:</p> <ul style="list-style-type: none"> • Restaurants and accommodation • Auto repairs • Hairdressers • Veterinary services • Some gyms <p>Deduction:</p> <ul style="list-style-type: none"> • 15% of VAT paid • Cap: about €250 	<p>Nursing Homes / Elderly Care</p> <ul style="list-style-type: none"> • Care homes • Assisted living <p>Deduction:</p> <ul style="list-style-type: none"> • 25% of expenses • Cap: about €403.75 	<p>Alimony Payments</p> <p>If legally required:</p> <ul style="list-style-type: none"> • 20% deduction • Usually no fixed cap (depends on the arrangement). 	<p>Donations</p> <p>Donations to approved charities:</p> <ul style="list-style-type: none"> • Typically 25% deduction • Sometimes higher depending on the institution.

allocating invoices on the e-Fatura portal

When you provide your **NIF number** to a business, the invoice issued to you should automatically appear on the e-Fatura portal.

To allocate the invoice to the correct tax deduction category, you will need to access the e-Fatura portal through your web browser, or download the e-Fatura mobile app.



Web Browser



Mobile App



e-Fatura web browser

How to use the e-Fatura web portal to allocate expenses:

AUTENTICAÇÃO

NIF

Nº de Contribuinte

Senha de acesso

Autenticar

Serviços Frequentes

- Arrendamento Emitir e Consultar
- IUC Emitir documento
- e-Fatura Verificar ou registar**
- Faturas e Recibos Emitir e Consultar
- Notificações e Citações
- Conta Corrente Municipios

e-fatura

SOBRE O E-FATURA | FAQ | CONTACTOS

FATURACÃO | FATURA SORTE | DESPESAS DEDUTÍVEIS IRS | DESPESAS DA ATIVIDADE | DOC. DE TRANSPORTE | AUTOFATURACÃO | INVENTARIOS

Bem-vindo(a)

Verificámos que existem 17 faturas pendentes de informação em seu nome. Será necessário proceder ao preenchimento da informação em falta.

Complementar Informação Faturas

Existe 1 fatura que inclui despesas de saúde sujeitas à taxa normal de IVA sem associação de receita médica.

Associar Recosta

Faturação / Adquirente

Adquirente

2025

395,50 €

Deduções Provisórias em IRS

Despesas Gerais Familiares 250,00 €

Saúde 35,19 €

Educação 99,60 €

Habitação 0,00 €

Lares 0,00 €

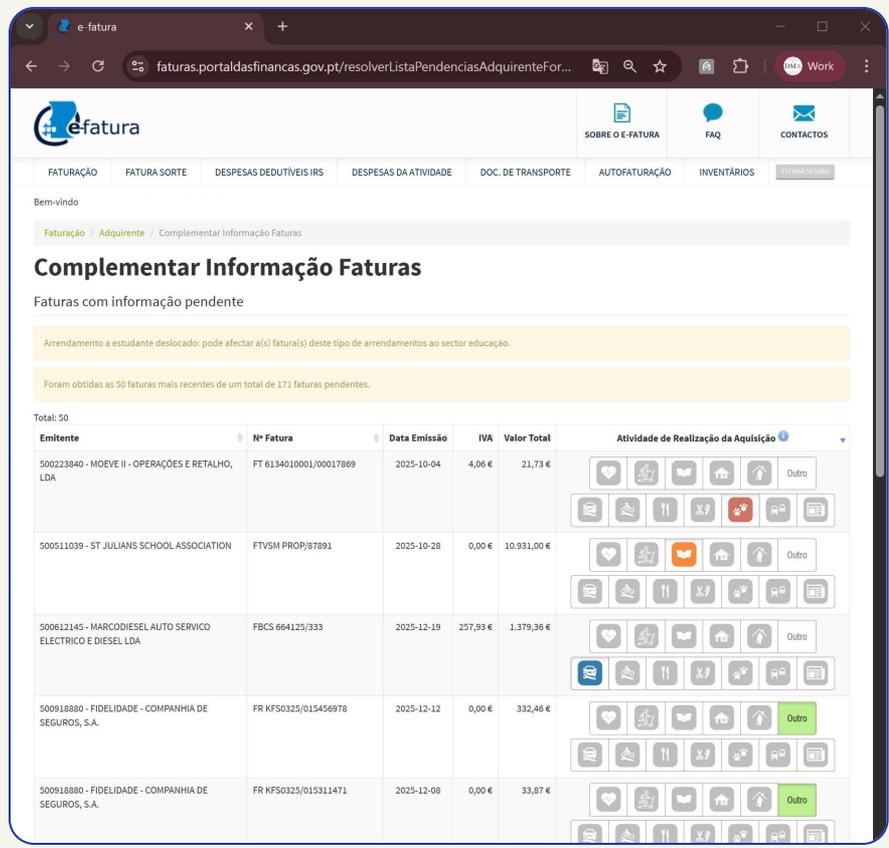
Reparação de Automóveis 0,00 €

Reparação de Motociclos 9,29 €

Restauração e Alojamento 0,61 €

e-Fatura web browser

You will be directed to a list of all your unallocated expenses:

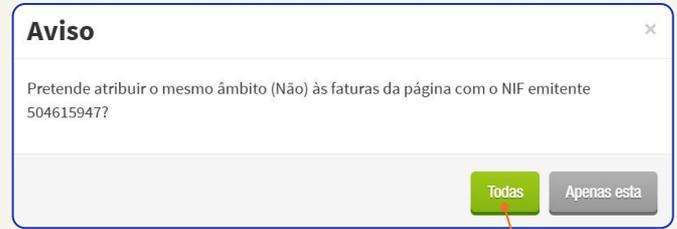


The screenshot shows the e-fatura web browser interface. At the top, there are navigation tabs: FATURACÃO, FATURA SORTER, DESPESAS DEDUTÍVEIS IRS, DESPESAS DA ATIVIDADE, DOC. DE TRANSPORTE, AUTOFATURACÃO, INVENTÁRIOS, and FECHAR Sessão. Below this, there is a section titled "Complementar Informação Faturas" with a sub-header "Faturas com informação pendente". A yellow banner indicates "Arrendamento a estudante deslocado: pode afectar a(s) fatura(s) deste tipo de arrendamentos ao sector educação." and another banner says "Foram obtidas as 50 faturas mais recentes de um total de 171 faturas pendentes." Below these banners is a table of invoices with columns for Emitente, Nº Fatura, Data Emissão, IVA, and Valor Total. The table contains 5 rows of invoice data. To the right of each row is a dropdown menu for "Atividade de Realização da Aquisição" with various icons representing different expense categories. The "Outro" option is highlighted in green for the last two rows.

Select an expense category for each invoice.



This image shows a close-up of the "Atividade de Realização da Aquisição" dropdown menu. It features a grid of icons representing different expense categories: a heart, a person with a cane, an open book, a house, a person with a house, and "Outro". Below this grid is another row of icons: a car, a person on a bicycle, a fork and knife, a pair of scissors, a person with a dog, a bus, and a document.



This image shows an "Aviso" (Warning) dialog box. The text inside reads: "Pretende atribuir o mesmo âmbito (Não) às faturas da página com o NIF emitente 504615947?". At the bottom of the dialog, there are two buttons: "Todas" (highlighted in green) and "Apenas esta".

Click "**Todas (All)**" if you would like the system to apply your selected options to all the invoices from the same supplier.

This will make the invoice allocation process quicker and easier.

e-Fatura web browser

The screenshot shows the e-fatura web browser interface. The browser address bar displays the URL: `faturas.portaldasfinancas.gov.pt/resolverListaPendenciasAdquirenteF...`. The main content area shows a table of expense invoices with columns for invoice number, company name, invoice type, date, and amount. A callout box highlights the 'Guardar' button at the bottom of the list, with the text 'Save your allocations!' and 'Important step'.

FATURAÇÃO	FATURA SORTE	DESPESAS DEDUTÍVEIS IRS	DESPESAS DA ATIVIDADE	DOC. DE TRANSPORTE	AUTOFATURAÇÃO	INVENTÁRIOS	E-FATURA
503454109 - AGEAS PORTUGAL - COMPANHIA DE SEGUROS, S.A.	FT	2024/0004057003	2024-06-08	0,00 €	1,25 €		
COMPANHIA DE SEGUROS,	FT	2024/0003893054	2024-06-07	0,00 €	1,25 €		
COMPANHIA DE SEGUROS,	FT	2024/0003871172	2024-06-06	0,00 €	1,25 €		
COMPANHIA DE SEGUROS,	FT	2024/0003871173	2024-06-06	0,00 €	1,25 €		
503454109 - AGEAS PORTUGAL - COMPANHIA DE SEGUROS, S.A.	FT	2024/0003856853	2024-06-05	0,00 €	1,25 €		
503454109 - AGEAS PORTUGAL - COMPANHIA DE SEGUROS, S.A.	FT	2024/0003856852	2024-06-05	0,00 €	1,25 €		

10 registos por página

← Anteriores 1 2 3 4 5 Próximos →

✓ Guardar

Save your allocations!

✓ Guardar

FATURAS Adquirente Emitente

FATURA SORTE Os Meus Cupões Ver Concursos Opção de Participação

DESPESAS DEDUTÍVEIS IRS Adquirente

DESPESAS DA ATIVIDADE Verificar Despesas

DOC. DE TRANSPORTE Remetente dos Bens Adquirente de Produtos Agrícolas Destinatário dos Bens Agentes Fiscalizadores

AUTOFATURAÇÃO Enviar Ficheiro Consultar Ficheiros

INVENTÁRIOS Enviar Ficheiro Consultar Ficheiros

E-FATURA Sobre o E-Fatura Perguntas frequentes Contactos Produtores de Software

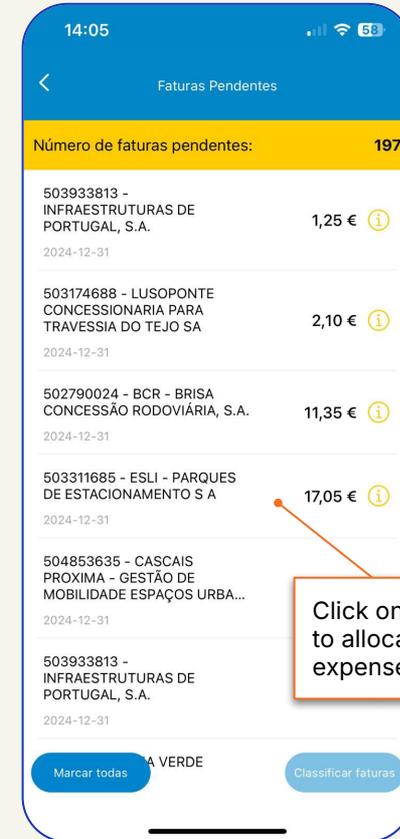
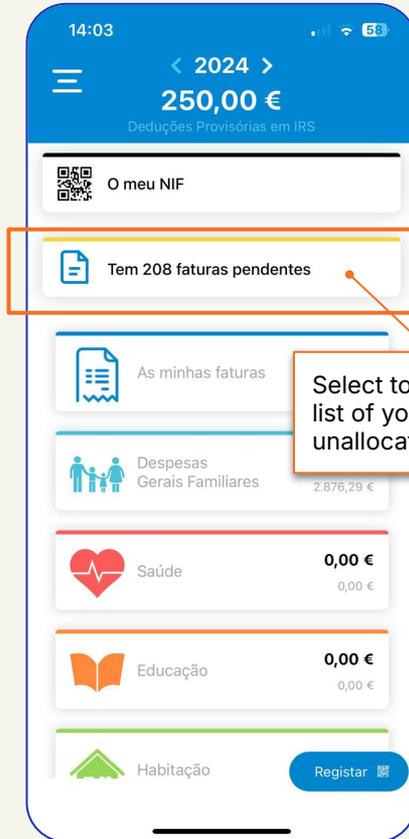
Important step

After allocating and verifying your expense invoices, click on the green "**Guardar (Save)**" button at the bottom of the list.

If you do not save your allocations before proceeding to the next page, or closing your web browser, the portal will not capture your allocations and the invoices will remain unverified.

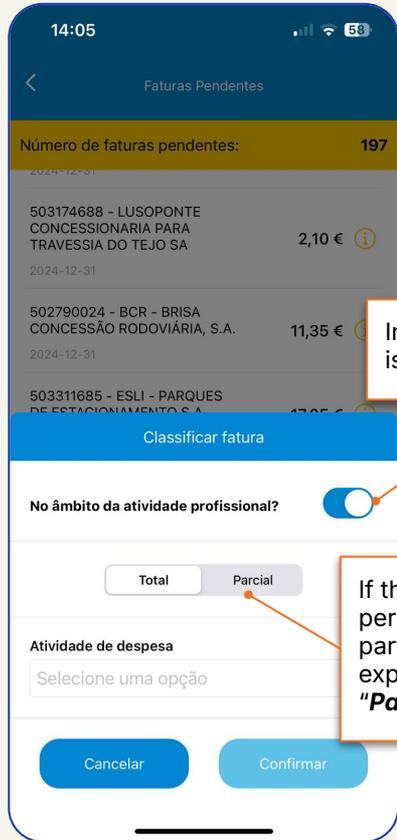
e-Fatura mobile app

How to use the e-Fatura mobile app to allocate expense invoices:



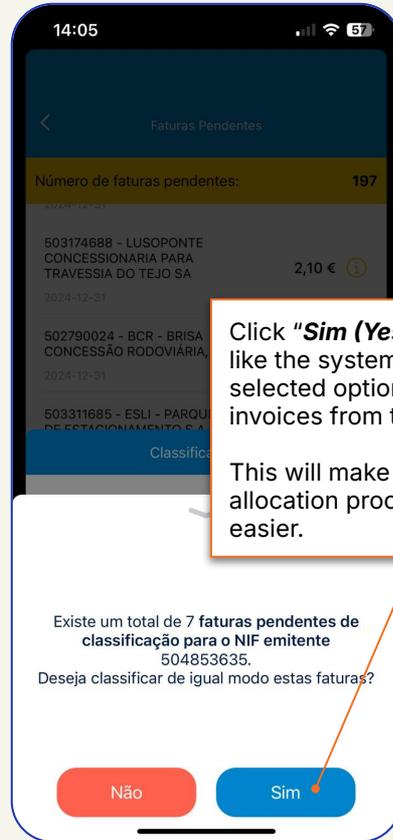
e-Fatura mobile app

How to use the e-Fatura mobile app to allocate expense invoices:



Indicate if the expense is business related.

If the invoice is partially a personal expense and partially a business expense, then select "**Parcial (Partial)**".



Click "**Sim (Yes)**" if you would like the system to apply your selected options to all the invoices from the same supplier. This will make the invoice allocation process quicker and easier.



e-Fatura expense categories

It is important to know what the e-Fatura symbols mean and what type of expenses they correspond to, so that you can take advantage of all possible deductions in your income tax return.

 HEALTH CARE	 GENERAL FAMILY	 EDUCATION	 RETIREMENT	 RESTAURANTS & ACCOMMODATION
 MOTOR VEHICLE REPAIRS	 MOTORCYCLE REPAIRS	 TRANSPORT PASSES	 GROOMING	 VETERINARY ACTIVITIES

If your expense does not fall into one of these predefined categories, you may select "other".



Get in touch with us via email if you have any questions:

info@dmatax.pt

Or book a consultation with us via our website:

dmatax.pt

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#dma_tax

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