HIVE

User Manual

Business Management Software for SMEs

Invoices • Quotations • Customer Management

Accounting • VAT Settlement • Reports

Version 1.0 • Februar 2026

www.inatsolutions.ch

Table of Contents

1	Introduction
2	Installation and Getting Started
3	The User Interface
4	Customer Management
5	Invoices
6	Quotations
7	Reminder System
8	Accounting
9	Service Catalog
10	Calendar, Suppliers & Email
11	Optional Extensions
12	Settings
13	Keyboard Shortcuts
14	Frequently Asked Questions
15	Support and Contact

Version 1.0.3.0 | Date: September 2026

1. Introduction

What is HIVE?

HIVE is a comprehensive business management software developed specifically for small and medium-sized enterprises in Switzerland. The software covers all important business processes, from quotation creation to invoicing to accounting and VAT settlement.

HIVE is available in two variants that can be used individually or combined:

- **Desktop application** (Windows; macOS in preparation), either fully local without internet (local mode) or connected to your HIVE account (remote mode)
- **HIVE Web App:** the application in your browser at app.inatsolutions.ch, no installation required, also on tablet and smartphone

In remote mode, both variants work on the same data: whatever you enter in the web app is instantly visible in the desktop application, and vice versa. This manual describes the desktop application; the web app closely follows its workflow. The features available in the web app are described per area in the documentation.

Your Benefits at a Glance

Area	Features
Invoicing	Swiss QR invoices, eBill/ZUGFeRD export, automatic reminders, recurring invoices
Customer Management	CRM with revenue statistics, account statement export, communication history
Quotations	Templates, one-click conversion to invoices
Accounting	Income/expenses, VAT settlement, bank import, reports
Security	AES-256 database encryption, automatic backups, session management
Optional Modules	Jobs & Projects, Vehicles, Tire Storage, Time Tracking (individually activatable)

System Requirements

Component	Minimum	Recommended
Operating System	Windows 10	Windows 11
Operating System (macOS)	Not yet available	In preparation
Memory	4 GB	8 GB
Hard Drive	500 MB free	1 GB free
Screen	1280 x 720	1920 x 1080

2. Installation and Getting Started

Performing Installation

Download the installation file from www.inatsolutions.ch and run INAT-HIVE-Setup.exe. The installation wizard will guide you through all steps. After completion, you will find the application in the Start menu and on the desktop.

Creating a User

On first launch, the registration dialog appears. Choose a username and create a secure password with at least 8 characters. After registration, you will be taken directly to the application.

Initial Setup with the Wizard

The setup wizard opens automatically and guides you through the most important basic settings:

Company Data: Name, address, phone, email, website and VAT number

Region and Currency: Country (CH, DE, AT, LI) and currency (CHF or EUR). VAT rates are automatically suggested based on the selected country. HIVE is designed for Switzerland: CHF is the default currency, and you can choose EUR if you issue documents in euros.

Bank Details: IBAN and QR-IBAN for Swiss QR invoices. This data is essential for correct payment slips.

Company Logo: Upload your logo (PNG, JPG or SVG). It will appear on all invoices and quotations.

Right at the beginning, the welcome area offers two main cards:

- **Simple:** the first main card for the focused entry. HIVE initially hides optional modules and concentrates on customers, quotations, invoices and payments.
- **Advanced:** the second main card for the full shell without the simplified focus mode. HIVE shows the full navigation immediately and does not display a **First steps** card.

Under **Simple**, you can optionally enable time tracking directly. The calm entry remains, but time tracking becomes visible immediately.

In the simple entry, a persistent **First steps** card appears on the dashboard after the wizard. It guides you through customer, first invoice, payment, and backup. Regardless of the start profile you choose, HIVE additionally offers a guided tour after setup that shows the most important stops: customers, quotations, invoices, accounting, the search (Ctrl+K) and the data backup.

If you choose **Advanced**, HIVE starts directly with the full navigation. The guided first path with **First steps** is not part of that entry; the guided tour, however, is offered here as well.

Tip:: You can reopen the setup wizard later at any time via **Settings > Help & Onboarding** to reapply or change the start profile.

HIVE Web App in the Browser

In addition to the desktop application, HIVE is fully available in your browser, no installation required:

1. Open app.inatsolutions.ch
2. Sign in with the workspace, email address and password of your HIVE account
3. If you have enabled two-factor authentication, also enter the 6-digit code from your authenticator app

The web app provides the central areas of the desktop application in your browser: Dashboard, Quotations, Invoices, Reminders, Customers, Calendar, Accounting, Reports, Suppliers, Catalog, the optional modules (Jobs & Projects, Vehicles, Tire Storage, Time Tracking) and Settings. The generated PDFs (invoices, quotations, reminders with Swiss QR code) are based on the same templates as in the desktop application.

The web app is responsive and works on tablets and smartphones, ideal on the go, e.g. to quickly look up an invoice or record a time entry.

Setup wizard in the browser: The first time you sign in to a new workspace, the same setup wizard as in the desktop application guides you through the basics: start profile, company details, logo, VAT and bank details. Your entries are saved after every step, and **Skip** takes you straight into the application at any point. Pay particular attention to the **QR-IBAN**: without it you cannot create an invoice with a Swiss QR code later on.

Guided tour: The web app also offers a guided tour after setup, with the same stops as in the desktop application; only the last step presents the **?** help menu instead of the data backup. You can restart the tour at any time from that ? menu at the top right. The tour is available at desktop screen width.

What's new: After an update the web app shows the changes in the current version, just like the desktop application. If you close the notice without ticking the box, it comes back the next time you start your browser or open a new tab; with **Don't show again** it stays hidden for that version. You can reopen it at any time from the question mark at the top right.

Tip:: **Combining desktop and web:** If you use the desktop application in remote mode, both variants work on the same data. Changes are instantly visible everywhere.

3. The User Interface

Application Structure

The application is divided into three main areas: The navigation bar on the left for quick access to all modules, the workspace on the right with the content of the selected module, and the title bar at the top with search function. Next to the search, the title bar holds the **Quick Invoice** icon. The main window can be resized down to 1000 x 600 pixels.

In the user area at the bottom of the navigation bar, you can see the currently signed-in user. Use **Log out** to return to the login dialog in a controlled way without force-closing the application.

If you choose the **Simple** card in the setup wizard, HIVE starts with a calmer shell: optional modules stay hidden at first. If you also enable time tracking below it, the calm entry remains and time tracking is visible right away.

In the focused shell, exactly one calm re-entry remains visible on the dashboard: the **First steps** card. It shows progress for customer, first invoice, payment, and backup and always points to the next area.

In the advanced entry, you see the regular interface with all enabled areas right away.

On every list page, the **Refresh** button in the header reloads the list (**F5** still works). The number next to the page title shows the number of entries. After saving or deleting, a short green notice appears and disappears on its own after a few seconds; error messages stay visible.

Navigation Overview

Area	Description
Dashboard	Overview with key figures, open items and statistics
Quotations	Create and manage your quotations
Invoices	Create and send invoices with Swiss QR code
Reminders	Manage and remind overdue invoices
Customers	Your complete customer database with revenue history
Calendar	Plan appointments and orders
Accounting	Record income and expenses
Reports	VAT settlement and detailed evaluations

Suppliers	Manage supplier database
Catalog	Maintain products and services
Email	Sending log of all sent emails

Dashboard

The Dashboard is your central overview page. Today's date appears under the title; there is no greeting. At the top you see the **revenue of the month**, with the counters **Overdue** and **Appointments** next to it. Color (red, orange) appears only when there is something to do, that is, when a counter is greater than 0. As long as there is no revenue, the line "No revenue yet." appears instead. Here you can see at a glance:

- **Revenue Overview:** Income and expenses for the current month and year
- **Open Items:** Number and total of unpaid invoices
- **Due Invoices:** Invoices that are due today or soon
- **Recent Activities:** The most recently created or edited documents
- **Statistics:** Graphical representation of your business development

Global Search (Ctrl+K)

The quick search can be accessed at any time with **Ctrl+K** or via the search field in the title bar. For normal entity searches, HIVE starts after **2 characters**; short `>` commands for actions remain available immediately. Document numbers such as invoices, quotations, order confirmations and reminders are prioritized ahead of broad name or fuzzy matches. For short searches with **2 to 3 characters**, HIVE also prefers prefix matches in document numbers and in the customer or company fields of documents before broader fallbacks are used.

- Customers (first name, last name, company, email)
- Suppliers (name, contact person, email, street, postal code, city, country)
- Invoices, order confirmations and reminders (number first)
- Quotations (number, customer)
- Catalog entries (description)

Click on a result to navigate there directly. Use `>` to trigger actions such as **Quick Invoice**, backup or import straight from the search.

Web App: Dialogs ask for confirmation ("Discard changes?") before unsaved input is lost. Filters and search are kept in the page address and survive a reload.

4. Customer Management

Creating a New Customer

Open the Customers area and click the Add Customer button or use the keyboard shortcut Ctrl+N. The customer dialog opens with the following fields:

In focus mode, creating the first customer completes the first step on the dashboard first-steps card.

Required Fields: First name and last name. The company is optional and can be stored in addition.

Contact Data: Salutation (selection field: empty, Mr, Ms, Company; your own entries remain possible), first name, last name, street, postal code, city, country

Communication: Phone, WhatsApp, email

Optional Areas: Default discount, notes, and documents can each be expanded separately

Customer Details and History

Clicking on a customer opens the detail view. Here you can see at a glance:

- All contact information (empty contact lines are not shown)
- Total revenue and outstanding receivables
- Recent invoices with status
- Payment history

If a **WhatsApp number** is stored for the customer, you can open a chat directly from the detail view. HIVE tries **WhatsApp Desktop** first and only falls back to **WhatsApp Web** when needed.

Use **Import Customers** in the tab header to open the existing import wizard directly in the customer context. It accepts **CSV**, **Excel (.xlsx)** and **vCard/VCF** files. Each file is limited to **10 MB**, **10,000 data rows**, and up to **5 Excel worksheets**. The import supports first name and last name as separate fields; existing full names are split into first and last name during import and when legacy data is migrated. With **Update existing contacts by email** enabled, HIVE updates matching customers by email address without overwriting existing data with empty import values. For single contacts, open the three-dot menu in the detail view and choose **Export as vCard** to save the selected customer as a `.vcf` file.

In the customer dialog, you can optionally store a **default discount**. It is proposed automatically as a document discount when creating new quotations, invoices, and quick invoices, but can be changed or removed per document at any time.

Creating Account Statement

Select a customer and click PDF Account Statement. You will receive a clear overview of all invoices, payments and the current balance, ideal for year-end closings or upon customer request.

5. Invoices

Creating a New Invoice

Switch to the Invoices area and click Create Invoice. In the invoice dialog:

1. Select the customer from the dropdown list
2. Add items, manually or from the catalog
3. Check net, VAT and total amount
4. Save the invoice

In the focused start, this is the second core step. As soon as the first invoice is saved, the first-steps card points you to payment capture.

Discounts can be entered directly in the dialog:

- line discounts per item as a percentage or fixed amount
- an additional document discount for the entire invoice
- automatic proposal of the customer's default discount

The totals block shows line discount, subtotal, document discount, VAT amount, and grand total separately. PDF export and eBill/ZUGFeRD use the same final totals.

When saving, HIVE automatically assigns a unique year-based invoice number in the format RE-YEAR-SEQUENCE, for example RE-2026-0001. Credit notes use the same mechanism with the GS prefix. Prefixes belong to your data, not to the display language: the number series stays consistent even if you switch languages or if several people work in different languages.

> Tip:: The document design (style, logo, colors, texts) is customized in the Document Designer; one design applies to invoices, quotes and reminders.

Swiss QR Invoice

HIVE automatically creates Swiss QR invoices according to the Swiss standard. When exporting to PDF, the QR code with all payment information is generated. Your customer can pay the invoice directly via mobile banking or at the counter.

The labels on the payment part follow the application language you have set. If you work in French, your customer receives a French payment slip; in English, an English one.

The payment part is printed in standard size (210 × 105 mm) and in the font sizes recommended by SIX: title 11 pt, details in the payment part 10 pt, in the receipt 8 pt.

If your bank details use a QR-IBAN, HIVE automatically creates the QR reference required for it and prints it on the payment part as well as in the eBill file; the bank import recognises an invoice paid with it straight away.

Tip:: **The QR-IBAN is mandatory.** If no QR-IBAN is stored, HIVE does not create a PDF but reports: "QR-IBAN is missing. Please enter it under Settings → Invoices & Reminders. The PDF was not created." This is intentional: a completely valid-looking payment part with a sample IBAN would send your customers' payments to a stranger's account. Store the QR-IBAN under **Settings → Invoices & Reminders → QR Invoice Data**, after which the export works as usual.

Right-Click Actions

Action	Description
Edit	Opens the invoice for editing
Preview	Shows the PDF in preview window
Export PDF	Saves the invoice as PDF file
eBill/ZUGFeRD	Exports in electronic format for e-banking
Send by Email	Sends directly to the customer
Send via WhatsApp	Opens WhatsApp with a prepared message and highlights the PDF in Explorer
Record Payment	Opens the payment dialog
Change Status	Manual status change
Create Credit Note	Creates a credit note (reversal) for this invoice
Create Installment Plan	Splits the open amount into monthly installments
View Installment Plan	Shows the existing installment plan with progress
Delete	Removes the invoice after confirmation

Sending via WhatsApp

For free WhatsApp delivery, store a **WhatsApp number** on the customer record. Then right-click an invoice, quote, or reminder and choose **Send via WhatsApp**. HIVE opens the chat with a prepared message and highlights the generated PDF in Explorer so you can attach it manually in WhatsApp.

Multiple Selection

Select multiple invoices with Ctrl+Click. The context menu then offers bulk actions: Send all by email, export all as PDF or mark all as paid.

Recording Payment

The Record Payment function connects invoicing and accounting:

1. Right-click on an invoice, then Record Payment
2. The dialog shows invoice amount and outstanding balance
3. Enter the payment amount and date
4. Select an accounting category
5. Click Book Payment

What happens automatically:

- The invoice is marked as paid or partially paid
- An accounting entry (income) is automatically created
- For partial payments, you can record additional payments

> Tip:: You can manage and extend the accounting categories yourself.

Understanding Color Coding

Color	Meaning
Green	Fully paid
Orange	Open, due date not yet reached
Yellow	Partially paid
Red	Overdue, reminder recommended
Gray	Cancelled

Recurring Invoices

For regularly recurring services (e.g., subscriptions, maintenance contracts, rent), you can set up automatic invoice templates.

Creating a new recurring invoice:

1. Switch to the Invoices area
2. Click **Recurring** in the header
3. In the overview dialog, click **New Recurring Invoice**

4. Select the customer and add items
5. Set the **interval** (weekly, monthly, quarterly, semi-annually or annually)
6. Set the **start date** and optionally an **end date**
7. Optionally activate **Send automatically** for direct email delivery

Management:

Action	Description
Edit	Adjust template (items, interval, etc.)
Deactivate	Pause template (no new invoices)
History	View all previously created invoices
Delete	Remove template (existing invoices remain)

Automatic Creation: When opening the application, HIVE automatically checks whether due recurring invoices need to be created. You will be notified about newly created invoices.

If a recurring template contains discounts, they are carried over unchanged to each generated invoice.

> Tip:: You can deactivate recurring templates at any time and reactivate them later.

Quick Invoice

With the Quick Invoice, you can create a simple invoice in just a few clicks:

1. Click the **Quick Invoice** icon in the title bar next to the search, or the **Quick Invoice** button in the header of the **Invoices** tab. Alternatively, type `>` in the quick search (**Ctrl+K**)
2. Select an existing customer from the dropdown list
3. Activate the required favorite items and adjust the quantity if needed
4. Check the automatically calculated total. Any saved customer default discount is applied immediately and shown below the customer selector
5. Click **Create Invoice**

The invoice is saved immediately and can then be exported as PDF or sent by email as usual.

eBill and ZUGFeRD

HIVE supports exporting invoices in electronic format:

- **eBill:** Swiss standard for electronic invoices. Your customers receive the invoice directly in e-banking and can pay it with one click.

- **ZUGFeRD:** European standard for hybrid invoices. The PDF file contains embedded XML data that can be automatically processed by accounting software.

Both formats are available via the context menu (right-click) for any invoice.

Credit Note (Reversal)

If you need to reverse services or cancel parts of an invoice, you create a credit note.

How to create a credit note:

1. In the Invoices tab: Right-click on the original invoice
2. Select **Create Credit Note**
3. In the dialog you see all items from the original invoice with checkboxes
4. Check the items you want to credit
5. If needed, adjust the quantity (column "Credit Quantity") for partial credits
6. Review the displayed credit amount (negative, e.g. – CHF 125.50)
7. Click **Create** and confirm

What happens automatically:

- A new invoice of type "Credit Note" is created (e.g. GS-2026-0001)
- All quantities are stored as negative amounts
- The original invoice remains unchanged
- An accounting entry is automatically generated

Partial credit notes:

You can partially credit the same invoice multiple times. Previously credited quantities are automatically taken into account; you can only credit the remaining quantity.

Example: Invoice for 5 chairs at CHF 50 (total CHF 250). The customer returns 2 chairs. You create a credit note for 2 chairs = – CHF 100. If they later return 1 more chair, you can create another credit note for up to 3 chairs.

> Tip:: Credit notes appear in the Invoices tab and can be filtered using the "Credit Notes" filter. They can be exported as PDF and sent like regular invoices.

Installment Payments

Split open invoice amounts into 2 to 12 monthly installments, ideal for larger orders or customer retention.

Create a new installment plan:

1. In the Invoices tab: Right-click on an open invoice
2. Select **Create Installment Plan**

3. Configure the plan:

- **Number of installments** (2 to 12, default: 3)
- **First installment due on** (select date)

4. The preview table automatically shows all installments with amount and due date
5. Optional: Add a note
6. Click **Create**

What happens automatically:

- Installments are distributed evenly (e.g. CHF 333.33 + 333.33 + 333.34)
- The last installment includes any rounding correction
- Each installment has a monthly due date

Manage installment plan:

1. Right-click on the invoice → **View Installment Plan**
2. The overview dialog shows:

- Total amount, already paid, open and progress percentage
- Table of all installments with status and color coding

3. **Colors:** Green = paid, Yellow = open, Orange = partial, Light red = overdue, Gray = cancelled
4. Click **Pay Installment** for the next due installment
5. If needed, you can cancel the entire plan via **Cancel**

Payment slip: A payment slip with a QR payment part is printed for every installment that is still open. If an installment has only been partly paid, the payment slip is issued for the remaining open amount. Paid installments remain visible in the plan with the status "Paid" but no longer get a payment slip. Once all installments are paid, the PDF contains no payment part.

Example: Customer invoice for CHF 600, installment plan with 3 installments:

- Installment 1/3: Due 15.01.2026, CHF 200
- Installment 2/3: Due 15.02.2026, CHF 200
- Installment 3/3: Due 15.03.2026, CHF 200

> Tip:: An installment plan can only be created for invoices that are not yet fully paid or cancelled.

6. Quotations

Creating a New Quotation

In the Quotations area, click Create quote. The process is similar to invoices:

1. Select customer
2. Add items
3. Set validity period (default: 30 days)
4. Save

Just like invoices, quotations support line discounts and an additional document discount. A default discount stored on the customer is proposed automatically.

When saving, HIVE automatically assigns a unique year-based quotation number in the format QT-YEAR-SEQUENCE, for example QT-2026-0001.

> Tip:: Quotations use the same document design as invoices and reminders; only the introduction text is quotation-specific and can be switched in the Document Designer.

Right-Click Actions

Action	Description
Edit	Opens the quotation for editing
Preview	Shows the PDF in preview window
Export PDF	Saves as PDF file
Send by Email	Sends to the customer
Send via WhatsApp	Opens WhatsApp with a prepared message and highlights the PDF in Explorer
Change Status	Manual status change
Trigger Order Confirmation	Creates a formal OC; HIVE then asks whether to create a job or an invoice from it
Convert to Job	Creates a new job pre-filled with the quotation data (requires the Jobs module)
Duplicate	Creates a copy of the quotation

Delete	Removes the quotation

Turning a Quotation into an Invoice

There is no direct action that turns a quotation straight into an invoice; invoices from quotations are always created via the order confirmation:

1. Right-click on a quotation (status Sent or Accepted) → **Trigger Order Confirmation**
2. Right-click on the resulting order confirmation → **Create invoice**

What happens automatically:

- A new invoice is created with all items
- Customer, address, VAT, discounts, and items are transferred
- A new unique invoice number is assigned
- The order confirmation is marked as Invoiced

Converting a Quotation to a Job

With the Jobs module active, you can continue a quotation directly as a job:

1. Right-click on the quotation → **Convert to Job**
2. The job dialog opens pre-filled (customer, title, quotation link)
3. After saving, quotation and job are linked to each other; the right-click menu takes you to the other document
4. The quotation is automatically marked as **Accepted** (from Draft or Sent)

If a job already exists for this quotation, HIVE asks before creating another one.

Quotation Status

Status	Meaning
Draft	Still being edited, not sent
Sent	Sent to the customer
Accepted	Customer has agreed
Rejected	Customer has declined
Expired	Validity period exceeded

Order Confirmation

For business processes that require a formal confirmation step between quotation and invoice, HIVE offers the Order Confirmation (OC).

Trigger an order confirmation:

1. In the Quotations tab: Right-click on a quotation (status Sent or Accepted)
2. Select **Trigger Order Confirmation**
3. The OC takes over all data from the quotation (customer, items, discounts, and amounts); an OC number is assigned automatically (e.g. AB-2026-0001)
4. HIVE then asks whether you want to create a **job** or an **invoice** from it right away, or **neither**. You can also decide later.

Follow-up actions via right-click on the OC:

The OC appears as an expandable row below the quotation. Via right-click, the following are available at any time:

- **Create invoice:** transfers all items and discounts to a new invoice (if one already exists, the entry opens the linked invoice instead)
- **Create job:** converts the quotation to a job (requires the Jobs module; if one already exists, the entry opens the linked job)
- PDF export and sending by email or WhatsApp

The order confirmation can be sent by email even when the desktop application is connected to the server (remote mode). The email text of the quotations is used.

Document type filter:

In the Quotations tab you can use the document type filter to switch between quotations and order confirmations.

Workflow overview: Quotation → Order Confirmation → Job and/or Invoice

Status	Meaning
Draft	OC created, not yet invoiced
Invoiced	Invoice was created from the OC

Tip:: Only one order confirmation can be created per quotation. An OC can only be deleted if no invoice is linked to it.

7. Reminder System

The 3-Level System

HIVE offers an automatic reminder system with configurable levels:

Level	Name	Days after Due Date	Standard Fee
0	Payment Reminder	3 days	CHF 0.-
1	First Reminder	14 days	CHF 0.-
2	Second Reminder	30 days	CHF 20.-
3	Final Reminder	45 days	CHF 40.-

Tip:: The reminder fees for each level can be individually adjusted. The third reminder level (collection notice) is **disabled** by default and must be actively enabled in Settings.

Reminder fees are always added on top of the open invoice amount. Existing line or document discounts on the invoice remain unchanged; the reminder fee itself is never discountable.

If you cancel a reminder, the automatic process creates no further reminders for that invoice. You can still send reminders manually. In the web app, the list shows the notice “Automation paused” for such invoices.

Creating a Reminder

In the Reminders area, you see all overdue invoices. To create a reminder:

1. Select an overdue invoice
2. Click Create Reminder
3. Choose the appropriate reminder level
4. Create the PDF or send directly by email

When creating the reminder, HIVE automatically assigns a unique reminder number in the format MA-YEAR-SEQUENCE.LEVEL, for example MA-2026-0015.1. All levels of the same invoice reuse the same base number.

Right-Click Actions

For invoices without existing reminder:

- Create Reminder: Starts the reminder process

For invoices with existing reminder:

- Send by Email: Sends the current reminder
- Send via WhatsApp: Opens WhatsApp with a prepared message and highlights the PDF in Explorer
- Show Reminder: Opens the reminder PDF
- Next Reminder Level: Creates the next higher level

Always available:

- Record Payment: Records receipt and creates accounting entry
- Mark as Paid: Closes the process

8. Accounting

Recording Transactions

In the Accounting area, you manage all income and expenses. Click Add booking:

In the simple entry, the first posted payment is the third step of the guided start. The card on the dashboard points you back to invoices and accounting for that step.

The entry number is automatically suggested as the next sequential number, but can be adjusted both when creating and when editing an entry. When renumbering, attached receipts and links move along automatically.

For Income:

- Type: Select Income
- Enter amount, date and description
- Choose category (e.g., Services, Product Sales)
- Optional: Link to an invoice

For Expenses:

- Type: Select Expense
- Enter amount, date and category
- Select the VAT rate; the selected rate and calculated VAT amount are saved per expense as a snapshot
- Optional: Attach receipt as PDF or photo

> Tip:: You can freely manage accounting categories: add your own, rename existing ones or delete them.

Scanning Receipts (OCR)

Use the **Scan** button in the Accounting tab to read receipts automatically:

1. Select the receipt as a PDF file
2. HIVE automatically detects date, amount, supplier and invoice number using text recognition
3. A pre-filled entry opens for review; the receipt is already attached
4. Check the detected values and save the entry

> Tip:: Text recognition supports German, English and French. With poor scan quality, individual fields may remain empty; simply fill them in manually.

Automatic Entries

Accounting entries are automatically created when you:

- Use Record Payment on an invoice
- Mark a reminder as paid

These automatic entries contain invoice number, customer name and the selected category.

Right-Click Actions

Action	Description
Edit	Opens the entry for editing
Add Receipt	Attaches PDF or image as receipt
Show Receipt	Opens the attached receipt
Delete Receipt	Removes the receipt
Delete	Deletes the complete entry

Bank Import

With the CAMT import function, you save time:

1. Export transactions from your e-banking as CAMT-XML
2. Click Bank Import in HIVE
3. Select the XML file
4. Assign the recognized payments to the corresponding invoices

VAT Settlement

Under **Reports** you will find the VAT overview:

- Revenue broken down by VAT rates
- Output tax owed
- Input tax deduction from expenses
- Net amount to be paid

Reports and Evaluations

The **Reports** area provides you with detailed evaluations:

- **VAT Report:** All revenues broken down by tax rate, including input tax
- **Account Statement:** Complete transaction list for accountant with running balance
- **Open Items:** Overview of all unpaid invoices with due dates
- **Revenue Overview:** Income and expenses by period
- **Year Comparison:** Trend analysis of income and expenses in multi-year comparison
- **Customer Analysis:** Revenue per customer
- **Article sales:** Top sellers and slow movers (sales quantities and revenue per catalog entry)
- **Supplier Report:** Purchase volume and expenses per supplier

Reports can be exported as PDF or Excel or printed directly. Export uses round icon buttons (PDF, Excel); a tooltip names the function when you point at one.

9. Service Catalog

The service catalog works identically in the desktop app and in the web app (app.inatsolutions.ch); unless noted otherwise, all features apply to both applications.

Managing Entries

In the Catalog, you maintain your products and services. A catalog entry contains:

- Type: **Article**, **Material** or **Service**
- Name and description
- Unit (piece, hour, flat rate, etc.)
- Purchase and selling price
- VAT rate
- Optional: Category for grouping
- Optional: Supplier, firmly linked via the supplier browser; the displayed supplier name is kept up to date automatically
- Active/Inactive status

Once both purchase and selling price are entered, the dialog shows the **margin** live (selling minus purchase price, as a percentage of the selling price). The **Stock** section (stock, minimum stock, storage location, supplier) is only shown for articles and material, for services it is hidden and the unit automatically switches to "Std".

Duplicate: Via the context menu (desktop) or the menu (web) you can create a copy of an entry; the dialog opens with the copied data, the description gets the suffix "(Copy)" and a new article number is assigned.

Active and Inactive Entries

Inactive entries do not appear in the item selection of invoices and quotations. They remain visible in the catalog list but are greyed out; the web app additionally marks them with an "Inactive" badge. Use the **Hide inactive** filter next to the search field to hide them entirely.

Organizing Categories

Categories are firmly linked to the entries:

- **Rename:** All assigned entries immediately adopt the new name
- **Delete:** Only removes the assignment. The entries are kept; subcategories automatically move up one level

- **Unique names:** Duplicate category names under the same parent are prevented (error message "Category already exists")

The left navigation card **Categories** shows **All** plus the full category tree, subcategories indented. Clicking a category filters the list; the header of the content card shows the selected category. Desktop and web share the same layout here.

Desktop: Right-click a category in the navigation to add, edit or delete categories, plus **New Subcategory** for nested structures.

Web: The table also contains a category column.

Search, Sorting and Filters

Click a column header to sort the list; clicking again reverses the direction, in the desktop and the web app. In the web app, search and category filter run server-side, so even large catalogs stay fast. A counter on the right of the toolbar shows "X of Y entries", desktop and web alike. In the web app, with more than 200 entries, load additional entries via **Load more**.

Using Catalog in Invoices

When creating invoices or quotations:

1. Click From Catalog
2. Select one or more entries
3. Items are transferred with price and VAT
4. Adjust quantity as needed

> Tip:: Only active catalog entries are available in the item selection.

Stock Tracking and Catalog Link

Positions added to invoices or quotations via the catalog picker remain **linked** to their catalog entry. This enables automatic stock tracking for articles and material:

- **Creating/editing an invoice:** Linked quantities are deducted from stock (edits only apply the difference)
- **Cancelling or deleting:** Stock is restored
- Services and free-text positions do not move stock; negative stock is allowed and highlighted in red

Bulk price adjustment: Select multiple entries (desktop: multi-select + right-click → **Adjust prices…**; web: **Select** mode → **Adjust prices**) and raise or lower selling prices by a percentage, optionally rounded to 5 centimes.

The **Article sales** report in the Reports area shows top sellers and slow movers based on this link.

CSV Export and Import

The catalog can be exported and imported as a CSV file; desktop and web use the same format (separator: semicolon). The export contains the columns in this order:

```
Article number;Name;Description;Unit;Type;Purchase price;Selling price;VAT rate;Stock;Minimum stock;Storage location;Category;Supplier;Active
```

- An export→import round trip does not lose any data
- Import error messages state the affected row
- Invalid types are rejected on import

Web: Import and export are available, just like on the desktop, via **Settings → Catalog management** (export for administrators only). On the desktop you find both under **Settings → Catalog & Accounting**.

10. Calendar, Suppliers & Email

Calendar

Plan appointments and orders with color coding by type. The calendar view shows daily, weekly and monthly overview.

When creating an appointment you can enter title, start, **end** (date and time, including multi-day appointments), **location**, customer and description. Below the location field, two buttons fill in the location with one click: **Use company address** (your own company address from the settings) or **Use customer address** (address of the selected customer). The inserted text remains freely editable.

> Tip:: Optionally, you can synchronize your Outlook calendar. Appointments are synchronized bidirectionally: the Outlook event carries the title and customer in the subject, the **appointment's location** as its location, and the recorded end time; when importing from Outlook, HIVE also takes over location and end time. Events deleted in Outlook are automatically removed from the HIVE calendar at the next sync.

Suppliers

In the Suppliers area, you manage your suppliers and service providers:

- **Master Data:** Company, contact person, street, postal code, city, country, phone, email
- **Bank Details:** IBAN for payments
- **Categorization:** Grouping by supplier type
- **Notes:** Free text field for special conditions or agreements

Suppliers can be assigned when recording expenses in accounting.

Use **Import Suppliers** in the tab header to open the import wizard directly in the supplier context. It accepts **CSV**, **Excel (.xlsx)** and **vCard/VCF** files. Each file is limited to **10 MB**, **10,000 data rows**, and up to **5 Excel worksheets**. Supplier addresses are stored as structured street, postal code, city, and country fields; old single-line addresses are migrated or imported into those fields as well as possible. With **Update existing contacts by email** enabled, HIVE updates matching suppliers by email address without overwriting existing data with empty import values. In the detail view, you can export the selected supplier as a `.vcf` file via the three-dot menu.

Email Sending Log

The Email area automatically logs all emails sent from within HIVE, such as when sending invoices, quotations or reminders. It is a read-only log (not an email client).

Features:

- **Sending Overview:** Tabular view of all sent emails with date, recipient, subject, attachment, linked document and status
- **Year and Status Filter:** Filter by year and sending status (Sent/Failed)
- **Full-text Search:** Search recipients and subjects
- **View Details:** Complete email details including message text and error information via double-click
- **Resend:** Resend failed emails with one click
- **View PDF:** Open linked invoice or quotation PDF directly from the log

Tip:: Emails are automatically logged when you send documents by email. Manual entry is not intended.

11. Optional Extensions

The following modules can be individually activated or deactivated under **Settings → Modules**.

Jobs Module (Jobs & Projects)

Optional for businesses managing jobs and projects, from small jobs to large construction sites. With **Create job** you choose the type; each type has its own number range:

- **Project (P-):** Classic project with budget, period and project address
- **Job (A-):** Lean small job with date and due date, without a budget field
- **Work order (WA-):** Job linked to a vehicle (requires the active Vehicles module). When billed, a service history entry is automatically created on the vehicle, linked to the invoice

Shared across all types:

- Work reports with material per entry and employee
- **Billing:** Open work reports and material are transferred into a prefilled invoice. The invoice items can still be reviewed and adjusted before creation
- **From a quotation:** A job can be created directly from a quotation (right-click on the quotation → Convert to Job); both documents remain linked to each other
- Status wording matches the type: projects (Active/Paused/Completed/Cancelled), jobs (Open/Waiting/Done/Cancelled)
- Type filter and search (including license plates) in the overview

Vehicles Module

Optional for businesses with vehicle workflows:

- Vehicle management (license plate, VIN, owner)
- Complete service history per vehicle
- MOT/inspection monitoring with automatically calculated next due date

Vehicle file

Double-clicking a vehicle (or **Open Vehicle File** in the context menu) opens the vehicle file, the central detail view for the vehicle. The header shows the license plate, make/model, customer, mileage, chassis number (VIN), color, insurance and the MOT status as a colored chip (green = valid, orange = due soon, red = expired). The vehicle can be edited and new service entries can be recorded directly from the header.

The file is organized into four areas:

- **Service history:** all entries with the total costs, PDF export and invoice creation

- **Tires:** the vehicle's stored tire sets (with an active tire storage module: size, type, storage location, storage/removal date)
- **Invoices:** all invoices linked to the service history (number, customer, date, status, amount)
- **Jobs:** the workshop and other jobs for this vehicle

Service entries with line items

Besides date, service type, mileage and description, a service entry can contain individual line items (parts and labor with quantity, unit and unit price). Line items can be entered freely or taken from the service catalog via **From Catalog**. As soon as line items exist, the cost field automatically becomes the sum of the line items and can no longer be edited manually; without line items, the costs remain a flat amount as before.

Mileage takeover: If the mileage of a service entry is higher than the vehicle's current mileage, the vehicle mileage is updated automatically when saving.

Invoice from the service history

Un-invoiced entries in a vehicle's service history can be turned into an invoice directly:

1. Open the vehicle file → **Service history** → select the desired entries (without a selection, all open entries are used)
2. Click **Create invoice**: the invoice dialog opens pre-filled (the vehicle's customer, default VAT). Entries with line items provide their real line items including the catalog reference; entries without line items provide one summary line per service entry
3. After saving, the invoice number is shown next to the entries; already invoiced entries are never billed twice

Workshop report as PDF

Via the context menu of a service entry (**Workshop Report (PDF)**), a report for the individual entry is created: letterhead, customer, vehicle (incl. VIN), date, service type, mileage, the recorded line items with total (or description and flat costs) as well as signature lines for the workshop and the customer, e.g. as an acceptance record.

Exporting the service history as PDF

Via **Export PDF** in the service history, the complete history of a vehicle can be exported as a PDF, e.g. for the customer when selling the vehicle or as a workshop record. The PDF contains the license plate, make/model and owner as well as all entries (date, service type, mileage, description, costs, linked invoice) with the total costs.

Tire Storage Module

Optional for seasonal tire operations:

- Tire storage with storage and removal
- Seasonal tire change planning

• Real vehicle link: when creating an entry, the vehicle is picked from the selected customer's vehicles and firmly linked (free text remains possible for legacy data)

• **Tread Depth:** Optional field per tire set (minimum of the four tires in mm). The table warns in color: red below 1.6 mm (legal minimum), orange below 4.0 mm (winter recommendation)

Printing a label with QR code

For each tire set, the context menu (**Print Label**) generates an A6 storage label: storage location in large print, customer, vehicle, size, DOT, tread depth, storage date and a QR code. The QR code contains `hive:reifen:<number>`, scanning it into the search field with a USB scanner jumps straight to the matching tire set.

Storage Receipt

Storage Receipt in the context menu creates an A4 confirmation for the customer. It contains the company header, customer, vehicle, tire details, storage location, storage fee, QR code, the storage terms and signature fields for customer and garage. **Send Storage Receipt** emails the same PDF as an attachment to the customer's email address; if there is no address, a notice appears. Edit the storage terms under **Settings → Tire Storage** (visible only while the module is active). If the text is left unchanged, HIVE prints the default text in the language of the printout.

Billing the storage fee

Right-click a tire set and choose **Create Invoice** to open an invoice with customer, line item and price already filled in (quantity 1, price = storage fee of the set). Select several sets of the same customer with Ctrl or Shift to get one invoice with one line per set. Nothing is booked until you save the invoice. Afterwards the **Billed** column shows the invoice number, and HIVE asks before a set is billed a second time. Sets without a storage fee are skipped. When a set is returned to storage for the next season, it counts as unbilled again.

Storage plan: racks and levels

The tire storage tab is laid out like **Jobs** and **Reports**: on the left are the sections **Storage Plan**, **No Rack** and **Removed** (the last two with the number of sets), on the right the content. At the top are the actions **Add Tires**, **Remove from Storage**, **Remind Customers** and **Add shelf**. The **Storage Plan** section shows the search field, the rack table and the tire table:

1. **Add shelf:** set the **location**, **rack** name, number of **levels** (1 to 50) and **shelf length** in cm (50 to 2000, default 240). There are no places or sets per place any more: tires stand side by side on the shelf. Right-click a rack for **Edit** or **Delete**

2. HIVE calculates the space each tire set needs from the tire width in the size: 205/55 R16 = 20.5 cm per tire, a set of 4 tires = 82 cm, 3 single tires of width 225 = 67.5 cm. Inch sizes (e.g. 31x10.50 R15) are converted; if no width can be read, HIVE assumes 22.5 cm per tire

3. The rack table shows location, rack, the layout (column **Layout**, e.g. "3 × 240 cm" = 3 levels of 240 cm shelf length each), the occupancy in % and the free capacity (column **Free**, e.g. "approx. 9 tires free").

4. Select a rack to see it built like the real shelf: one bar per level, **level 1 is the bottom bar** (like the floors of a building), the top bar is the highest level. Each tire set is a block as wide as its tires really are, showing the customer and count × width (e.g. "Muster AG · 4×205"); the rest of the

bar shows the free space, e.g. "78 cm free". An overfull level shows a red marker such as "+12 cm over". To the right of each bar the occupancy is shown, e.g. "162 / 240 cm"

5. The tire table below shows only the sets of that rack. Clicking a level filters the table to that level, clicking it again shows the whole rack. With **Store Here** you add a new tire set directly on the selected level

6. The **search** searches the active section. In the storage plan it overrides the rack selection and searches all stored sets. A scanned label QR code jumps to the section that holds the set. All actions stay in the tire table: double-click edits, right-click offers among others **Remove from Storage**, **Return to Storage**, **Print Label** and **Delete**

7. **No Rack** shows stored sets without a rack, e.g. with an old free-text storage location. **Removed** shows all removed sets. If there is no rack yet but there are already sets without a rack, HIVE opens **No Rack** directly at start, otherwise the **Storage Plan**

8. When creating or editing a tire set, choose the rack and level (the selection shows e.g. "E2 · 74 cm free", an overfull level shows "full"). A hint shows how much space the set needs and warns when there is not enough: "Should not fit (calculated: 8 cm short), still possible". There is no hard block, because you decide at the rack (larger or smaller tires, rims). The storage location is set automatically and printed on the label, e.g. "Hauptgarage · R1 · E2" (= level 2). Without a rack, the storage location remains free text as before

Note: the **shelf length** can be changed at any time. **Levels** can only be removed when nothing is stored on them; otherwise an error message appears. If a rack is deleted, the tire sets are kept and only lose their place. Removing a set from storage frees the place automatically; the storage location text stays as history.

Existing racks are converted automatically: former compartments become levels with the same number (R1-03 becomes R1 · E3), and the grid racks of the previous version become the levels of their row. The shelf length is estimated (places × sets per place × 90 cm) and can be adjusted. Labels that were already printed remain valid, because the stored storage location text only changes when you edit the rack.

Tire change reminder

Via **Remind Customers** in the tire storage tab, customers with currently stored tires can be reminded of the seasonal change by email:

1. The list shows all customers with stored tires including their email address; customers without an email are highlighted

2. Subject and message are pre-filled and fully editable (placeholders `{kunde_name}` and `{firma}` are replaced)

3. Emails are only sent after clicking **Send reminders**; there is deliberately no automatic sending

4. Optionally, HIVE creates a calendar note for following up

Time Tracking Module

Optional for businesses that want to track and bill employee working hours. The module can be activated under **Settings → Modules**.

Employee Management

In the **Time Tracking** tab, you manage your employees:

- **Master Data:** Personnel number (auto-generated), first name, last name, position, department
- **Contact:** Email, phone
- **Work Time Model:** Workload in % and target hours per week. Both fields are linked: change the workload and HIVE calculates the target hours automatically, and vice versa. 100 % corresponds to the full-time workload from **Settings → Time Tracking** (preset: 42 h/week); the target hours are what is saved. Plus the hourly rate for billing
- **Vacation Entitlement:** Vacation days per year per employee; if the field stays on "Default", the company default from **Settings → Time Tracking** applies (preset: 25 days)
- **Status:** Active/Inactive/Resigned. Inactive and resigned employees do not appear in the selection lists for new time entries and absences. The monthly report picker under **Reports**, however, shows all employees (including resigned ones) so that historical reports remain possible.
- **Notes:** Additional information about the employee

The employee table shows the workload in its own column (whole percent) directly before the target hours per week.

Time Entries

Time entries document the daily working hours per employee:

- **Date and Times:** Work start, work end, break (in minutes)
- **Assignment:** Optionally assign to a customer and/or project
- **Activity:** Description of work performed
- **Automatic Calculation:** Net working time is calculated automatically from start, end and break
- **Status Filter:** The list can be filtered by status (Recorded/Approved/Billed)
- **Approve via Right-Click:** Time entries with status "Recorded" can be approved directly via the context menu, including several selected entries at once
- **Duplicate:** Creates a copy of an entry with today's date via the context menu (status "Recorded")
- **Excel Export:** The currently filtered list can be exported as an Excel file

Tip:: **Tip:** When creating a new time entry, start/end and break are pre-filled with default values.

Tip:: **Web App:** In the HIVE web app, all date fields in time tracking display and accept the format DD.MM.YYYY, regardless of the browser language.

Absences

Absences record holidays, illness, accidents and other absence reasons:

- **Types:** Vacation, Sick Leave, Accident, Military/Civil Service, Training, Unpaid Leave, Other
- **Period:** From-date and to-date (multi-day possible)
- **Half Day:** Option for half-day absences
- **Approval:** Absences can be marked as approved, also directly via right-click in the context menu (several selected at once)
- **Overlap Warning:** When saving, HIVE warns if the period overlaps with an existing absence of the same employee
- **Calendar Integration:** Absences are displayed as colored markers in the calendar (if Calendar tab is visible)

Hour Billing

The hour billing dialog enables direct invoice creation from recorded working hours:

- **Filter Options:** Period (From/To), employee
- **Overview:** Selected entries, total hours, total amount
- **Tabular Evaluation:** All approved, billable time entries with date, employee, activity, hours, customer, project and hourly rate
- **Direct Invoice Creation:** Selected time entries are directly converted into a pre-filled invoice
- **Status Workflow:** Entries are automatically marked as "Billed"

Target/Actual Report & Monthly Report

With the Time Tracking module active, the **Reports tab** shows the **Staff** category with the **Time Tracking** report:

- **Target/Actual Comparison:** Actual hours, target hours and the overtime balance are calculated per employee and month. The target derives from the target hours per week (÷ 5 per working day Mon to Fri); approved absences reduce the target accordingly
- **Vacation Balance:** Entitlement (individual or company default), vacation days taken (approved vacation absences in the year) and remaining entitlement
- **Monthly Report PDF:** Per employee and month, with all time entries including daily rows, totals, target/actual summary, absences and signature lines (suitable as working time documentation under labour law)
- **Exports:** The evaluation can be exported as PDF and Excel

Integration with Other Modules

The Time Tracking module is seamlessly integrated into the application:

- **Reports:** Target/actual evaluation, vacation balance and monthly report in the Reports tab (Staff category)
- **Dashboard:** Time tracking KPIs (active employees, weekly hours, today's absences) are displayed as cards on the dashboard
- **Jobs:** An "Hours" column with hours worked per entry is displayed in the jobs/projects overview

- **Reports:** When creating reports, the employee can be selected from the time tracking employee list (dropdown instead of free text)
- **Calendar:** Absences are displayed as colored markers in the calendar
- **Global Search:** Employees from time tracking appear in search results (Ctrl+K)

Tip:: Optional extensions can be individually activated under Settings → Modules.

12. Settings

The navigation of the desktop settings is organized into seven groups with 18 areas:

Group	Areas
General	General (Language, Updates, Help & Onboarding)
Company	Company Data, Value Added Tax, Modules
Documents	Invoices & Reminders (QR Invoice Data, Document Layouts, Dunning Fees), Catalog & Accounting (Catalog Management, Categories & Export)
Extensions	Time Tracking, Tire Storage (only visible while the module is active)
Communication	Email & Calendar (including email templates and WhatsApp message templates), Webhooks
Data & Backup	Database & Backup (Manage Backup, Database & Import), Delete Tables, Change Log
Account	User Management, License Status, Connect Account (local mode only), License Key, Subscription & Payment

The sections of this chapter follow the topics (invoices, dunning, catalog, accounting, WhatsApp, integrations and so on); each section names the path to its area.

General

Language

Choose between Deutsch, English and Français. The change takes effect after a restart and then affects all menus, dialogs and messages.

Automatic Updates

When enabled, the application checks for new versions at startup. You will be notified when an update is available and can decide whether to install it.

Usage Statistics

Optionally, you can send anonymous usage statistics to INAT Solutions to help improve the software. No personal data, customer data or invoice contents are transmitted. The toggle is located in the Updates section.

Appearance

Switch between light and dark design using the sun/moon icon in the title bar (top right). The dark design is easier on the eyes during extended work and is ideal for low-light work environments. The theme switches instantly without a restart.

Help and Introduction

Here you can restart the setup wizard, view the news of the current version, open the help glossary or show the keyboard shortcuts overview. You can also open the glossary context-sensitively with F1; the shortcuts overview is additionally available via Ctrl+/.

When you restart the setup wizard, you can also switch the **start profile**. The profile updates visible add-on modules and the focused shell immediately.

As long as the focused start is not complete, the **First steps** card remains visible on the dashboard. The fourth step opens the backup dialog directly from there or via the shortcut Ctrl+B.

Company

Master Data

All information that appears on your business documents:

Field	Usage
Company Name	Sender on invoices and quotations
Slogan / tagline	Optional, appears as the second line of the footer
Street, Postal Code, City	Complete business address
Phone	Contact option for customers
Email	Sender address and contact
VAT Number	For VAT-registered companies
Website	Optional, appears in footer
Bank	Optional, name of your institution in the footer
Account Number	Optional, appears in the footer after the bank name
Country	Determines currency and VAT suggestions
Currency	CHF or EUR for all amounts

Footer of Your Documents

The footer of every document PDF (invoice, quotation, order confirmation, credit note and reminder) is **always generated automatically from this company data**. It is maintained here and nowhere else. Where filled in, the following lines are printed in this order:

1. Company name
2. Slogan / tagline
3. Street
4. Postal code and city
5. Phone, email and website
6. Bank and account number

Fields you leave empty are skipped, so no blank lines appear. The slogan, bank and account number fields exist in both the desktop application and the HIVE Web App and hold the same values. Desktop and web both show the company data in one card with the sections **Company & address**, **Contact** and **Bank details**; the slogan sits under Company & address, the two bank fields under Bank details.

Value Added Tax

Configure your VAT settings:

- Checkbox to activate VAT liability
- Set standard rate (Switzerland: 8.1%)
- Define reduced rate (Switzerland: 2.6%)
- Activate special rate if needed (e.g., 3.8% for accommodation)

The rates are offered as selection for invoices and in the catalog.

Modules

Activate or deactivate optional functional areas:

- Jobs module for jobs, projects and work reports
- Vehicles module for vehicle management
- Tire storage module for storage/removal and seasonal planning
- Time tracking module for working time recording and hour billing

After activation, the new areas appear in the navigation. You find the company defaults for time tracking (vacation entitlement, full-time workload) in the dedicated **Settings → Time Tracking** area (see below).

Invoices

QR Invoice Data

For correct Swiss QR invoices you need:

Field	Explanation
IBAN	Your account number in international format

QR-IBAN	Special IBAN for QR payments (from bank)
Account Holder	Name as it appears on the payment slip
Reference Type	QRR (with reference) or SCOR (without)

Tip:: Without a stored QR-IBAN, HIVE creates **no** document PDF at all. See chapter 5 under **Swiss QR Invoice** for details.

Document Designer

Open **Settings → Invoices & Reminders → Document Layouts → Open Document Designer**. There is **one design for all documents**: invoices, quotes and reminders use the same style, logo and colors. The designer opens as a spacious studio: the **icon rail on the left** switches between the four areas **Design**, **Colors & font**, **Texts**, and **Logo**; the large live preview on the right offers zoom and **Fit**. In the header bar you switch the preview between **Invoice**, **Quote** and **Reminder** to check the design on each document type.

Design

- Choose one of **21 style templates**: **Nova, Helvetic, Facet, Quartz, Atelier, Split, Minimal 2.0, Aurora, Bold, Wave, Terra, Bento, Ribbon, Duotone, Blob, Arch, Mesh, Poster, Ticket, Depth**, and **Slate**
- Every template appears as a **real mini rendering** of a sample invoice; you immediately see how the design looks
- Use the **search field** and the **category chips** (All, Classic, Colorful, Organic, Typographic) to filter the catalog

Colors & font

- Full **color picker** for the accent color: color area and hue slider, direct **hex input**, plus a dialog for custom colors (including a screen eyedropper)
- **Quick pick** colors and **Recently used** for recurring company colors; **Default (from style)** returns to the curated accent color of the selected design
- A **legibility hint** warns about colors that are too light, and the **"Effect on the document"** schema shows live which elements (bands, hero total, table and sum lines) adopt the accent color; text and paper tones stay fixed
- Select the font via the "Font" dropdown; each entry is rendered in its actual typeface so you can directly compare Helvetica, Times, and Courier variants

The ten newest templates extend the catalog with distinctly different document styles:

Template	Characteristics
Bento	Card-based board with the title, total, and metadata arranged as tiles
Ribbon	Plum bookmark ribbon containing metadata and the total

Duotone	Diagonally split header in ultramarine and coral
Blob	Organic shapes with a peach-colored blob behind the title
Arch	Terracotta arch with title and metadata plus a sand-colored total
Mesh	Atmospheric pastel gradient panel with translucent glass chips
Poster	Bold typography with the total as the central focal point
Ticket	Boarding-pass look with perforation and a tear-off total section
Depth	Floating card with a soft shadow on a color field
Slate	Dark information block with mint-colored chips and a footer band

Texts

- Store header text (applies to all documents)
- **Footer:** display only, not editable. It is always generated from your company data; the note below the field points to **Settings → Company Data**. If you previously typed your own text here: that text never appeared in any PDF export.
- **Introduction per document type:** Use the switch in the introduction field to maintain separate introduction texts for invoices and quotes; reminders automatically use the text from the dunning settings
- Adjust additional invoice texts and microcopy

Logo

- **Anchor Grid (3×3):** One click places the logo at any of the nine standard positions (top-left, top-center, top-right, middle-left, ..., bottom-right). The logo snaps to the chosen corner with a smooth animation.
- **Drag and drop in the preview:** Click the logo directly in the preview, drag it to the desired location, and release. While dragging, a subtle ghost outline appears as a placeholder.
- **Advanced (collapsible):** Under "Advanced" you will find sliders and input fields for millimeter-precise fine-tuning of X/Y offset and logo size, ideal for keyboard navigation and exact values.

Save and discard

- **Save** confirms the change with a short checkmark feedback directly on the button (no more popup messages).
- **Discard changes** reverts all values to the last saved state, after a confirmation dialog so nothing gets lost by accident.

Tip:: Quotations use the same document design as invoices; there is no separate quotation editor. In the **Document Designer** (see above under **Invoices**) you maintain the quotation-specific introduction text via the switch in the **Texts** area and check the result with the quotation preview. There is no dedicated Settings area for quotations.

Dunning

Configure Fees

You find the dunning fees under **Settings → Invoices & Reminders → Dunning Fees**.

Adjust the reminder fees for each level to your needs:

Level	Description	Default
Level 0	Friendly reminder without fee	CHF 0.-
Level 1	First formal reminder	CHF 0.-
Level 2	Urgent reminder	CHF 20.-
Level 3	Final reminder before collection	CHF 40.-

The third reminder level (collection notice) is **disabled** by default; you actively enable it if you want to use it. Additionally, you can individually formulate the reminder texts for each level.

These fees are added to the open invoice amount when a reminder is created and are not included in existing line or document discounts.

Catalog

Management

Under **Settings → Catalog & Accounting → Catalog Management** you manage the structure of your service catalog:

- Create, rename and delete categories
- Set default VAT rate for new entries
- Import/export catalog data (CSV)

Accounting

Manage Categories

Under **Settings → Catalog & Accounting → Categories & Export** you organize your accounting with your own categories:

Income Categories: Product Sales, Services, Commissions, Other Income

Expense Categories: Materials, Personnel Costs, Rent, Insurance, Vehicle Costs, Office Supplies, Marketing, Bank Fees, Other Expenses

You can add, edit or delete categories (as long as no entries are assigned).

Export Receipts

Export all receipts of a selected period as ZIP archive. Ideal for your accountant or tax return.

Time Tracking

While the time tracking module is active, the settings show a dedicated **Time Tracking** area. There you define two company defaults:

- **Vacation entitlement per year (default):** Applies to all employees without an individual vacation entitlement (preset: 25 days)
- **Full-time workload (100 %):** Defines how many weekly hours correspond to a workload of 100 % (preset: 42 h, adjustable from 1 to 80 h). This value is the basis for the workload conversion in the employee dialog

> Tip:: **Web App:** In the HIVE web app, you find these defaults as a dedicated **Time Tracking** section in the **Company** category, likewise only visible while the module is active.

Tire Storage

While the tire storage module is active, the settings show a dedicated **Tire Storage** area. There you edit the **Storage Terms** printed on the storage receipt for the customer. **Insert Default Text** restores the suggested text; nothing is stored until you click **Save**. If the text is left unchanged, HIVE prints the default text in the language of the printout.

> Tip:: **Web App:** In the HIVE web app, you find the storage terms as a dedicated **Tire storage** section in the **Company** category, likewise only visible while the module is active.

Email & Calendar

The **Email & Calendar** area (group Communication; it also holds the email templates and the WhatsApp message templates) has the same layout on desktop and web: one card with the **Email** block (status chip, short text, buttons) and the **Calendar** block below it. One Microsoft connection covers email and calendar; alternatively, email is sent via SMTP.

- **Email: Set up email** opens the setup wizard as a dialog. Once sending is configured, **Send test email**, **Set up again** and **Disconnect** are available.
- **Calendar: Connect Outlook Calendar** links your Microsoft account; appointments are synchronized bidirectionally. **Disconnect Calendar** removes the link.

Email Sending (SMTP)

For direct email sending without Outlook, configure:

Field	Example
SMTP Server	smtp.gmail.com or smtp.office365.com
Port	587 (TLS) or 465 (SSL)
Username	Your email address
Password	App password or account password
Sender Name	John Smith or Company Ltd

Tip:: **Web App:** If you change the mail server, port or user name, you must enter the password again. Signing in to the mail server without encryption (neither SSL/TLS nor STARTTLS) is no longer possible.

Tip:: HIVE checks the security certificate of your mail server every time it sends. If HIVE reports that the certificate is invalid, contact your mail provider.

Email Templates

Create reusable templates for:

- Invoice sending
- Quotation sending
- Reminders of each level

Available placeholders: {customer}, {salutation}, {invoice_no}, {amount}, {due_date}

Data & Backup

Database

Under **Settings → Database & Backup** (block **Database & Import**) you choose between two modes:

- **Local:** All data is stored encrypted on this computer, no internet needed
- **Remote (HIVE Cloud):** You sign in with your HIVE account (workspace, email, password, 2FA code if enabled). Your data is stored on the secured HIVE server; access from multiple devices and additionally via the HIVE web app in the browser

Switching is done via **Manage Connection**. In remote mode, the desktop application and the web app work on the same data.

Data Transfer (Local ↔ Cloud Workspace)

Via **Settings → Database & Backup → Database & Import → Synchronize** you transfer your complete data set between the local database and your cloud workspace, including all receipts and documents:

- **Upload (local → cloud workspace):** e.g. when switching from local to remote mode. Your data is then available in remote mode and in the HIVE web app.
- **Download (cloud workspace → local):** e.g. when switching back to local mode or to create a local working copy.

The assistant works in two steps:

1. **Preview:** You see in advance which tables and how many receipts will be transferred. For uploads, the server additionally checks whether your plan's storage space and user seats are sufficient; only then is anything changed.
2. **Transfer:** After your explicit confirmation, the target side is completely **replaced** by the transferred data. A backup is created automatically beforehand.

> Tip:: **Important:** The transfer is a complete replacement, not a merge. Review the preview before confirming. Your workspace user accounts remain untouched during an upload.

> Tip:: **Receipts:** Receipts count towards your plan's storage space (e.g. 512 MB on Starter, 2 GB on Plus, 5 GB on Pro). If the space is not sufficient, the preview shows a corresponding message. Embedded binary values such as the company logo must be re-uploaded once in the workspace after the upload.

Database Encryption

HIVE automatically encrypts your local SQLite database with AES-256-GCM. The encryption key is protected via Windows DPAPI and is tied to your Windows user account. This means:

- Your data is encrypted on disk
- Only your Windows account can decrypt the data
- When changing devices, you need a backup **and** the exported key file (see Key backup)

> Tip:: Encryption happens transparently in the background and requires no manual configuration.

Data Backup

Protect your data:

- Create manual backup at the push of a button (Ctrl+B)
- An initial backup is created automatically on the first login
- Automatic backup every 7 days (can be enabled)
- Set backup location (local folder or network drive)
- Restore backup from file
- Configure automatic reminder (weekly recommended)

Tip:: **Cloud backup (remote mode):** In remote mode, a backup protects your cloud data: HIVE downloads the complete dataset of your workspace (incl. receipts) encrypted and stores it as a backup file. Restoring uploads a cloud backup back to the server and, after a preview and double confirmation, replaces ALL data there (admin role required, 1 GB upload limit). A cloud backup always belongs to exactly one workspace and cannot be restored into a different workspace.

Tip:: **Password for cloud backup and full export:** For the cloud backup and the full export, HIVE asks for your account password for security reasons, and additionally for the code if two-factor sign-in is enabled. When the desktop application is connected to the server, HIVE no longer creates the cloud backup silently in the background. If a cloud backup is due, a notice for administrators appears at program start, and the backup starts once you have entered your password. It is due as long as no cloud backup exists yet, and afterwards every 7 days when automatic backup is switched on. If you choose "Later" in the notice, it reappears on this device after 7 days at the earliest. While a cloud backup is running, HIVE cannot be closed; you will receive a message as soon as it has finished. Older desktop versions must be updated for the cloud backup.

Tip:: **Key backup:** Backups are encrypted with a device-bound key. In the backup dialog, use **Key backup** to export a passphrase-protected recovery key file (.inatkey): only with it are your backups readable on a new device after PC loss or reinstallation. Store the file and passphrase separately and safely.

Data Import

Transfer data from other systems:

- Import customers from CSV file
- Import catalog entries
- Transfer accounting data

A wizard guides you through column mapping.

Reset Data

If needed, you can selectively clear areas:

- Delete all invoices
- Delete all quotations
- Reset accounting
- Reset complete data

Each action requires double confirmation to protect against accidental data loss.

Change Log

Under **Settings → Change Log** you will find a complete log of all data changes in the application. This serves compliance requirements and full traceability.

Available filter options:

Filter	Description
Type	Entity area (customers, invoices, etc.)
User	Which user made the change
Action	Created / Changed / Deleted

The table shows per entry: timestamp, user, type, ID, action, and a description of the change. 100 entries are shown per page; use the navigation buttons to page through.

Export and Archiving:

- **CSV Export:** Exports the filtered view as a CSV file.
- **Archive...:** Selects a period, creates a ZIP file with CSV and checksum, verifies the export, and then deletes exactly those exported entries from the database.
- **Local storage:** With local SQLite usage, storage is freed after successful deletion. In web/remote mode, archiving uses a server-side snapshot so only exported entries are deleted.

User

User Management

Manage access to the application:

- Create new users with their own password
- Change existing passwords
- Deactivate or delete user accounts

Roles in local mode

Role	Permissions in the desktop application
Viewer (`viewer`)	Can view data but cannot create, edit or delete records. Write attempts are rejected by the application's services.
Member (`user`)	Can create, edit and delete operational data, but cannot manage users.
Administrator (`admin`)	Can write operational data and manage users.

The read-only restriction applies within the desktop application. In remote mode, the HIVE server additionally enforces role permissions on the server side.

Deactivate / Activate a User

To temporarily revoke a user's access without deleting the account:

1. Go to **Settings → User Management**

2. **Right-click** on the desired user
3. Select **"Deactivate"** from the context menu

The user can no longer log in after deactivation. The account and all associated data are fully preserved. To restore access, repeat the process and select **"Activate"**.

> Tip:: **Note:** You cannot deactivate your own account. Deactivated users receive no specific error message on login; this is a security measure against account enumeration.

Reset Password

If a user has forgotten their password, the **“Forgot password?”** link is available in the login dialog. The process runs in three steps:

1. **Enter username:** Enter the username of the account.
2. **Confirm code:** A 6-digit numeric code is sent to the user’s stored email address. The code is valid for 15 minutes. After 5 failed attempts, the process is locked for 15 minutes.
3. **Set new password:** Enter a new password with at least 8 characters and confirm it.

> Tip:: **Requirements:** The user must have a valid email address stored in their profile. The reset code is delivered through the central HIVE service, so no local SMTP or Outlook configuration is required.

> Tip:: **Session timeout:** After 30 minutes without keyboard or mouse activity, HIVE ends the current session for security reasons and returns to the login dialog. Any open dialogs are closed during this process.

Inviting Users (remote mode)

In remote mode you can invite new users by email: **Settings → User Management → Invite User**. The invited person receives an invitation link and sets their own password when opening it for the first time.

Two-Factor Authentication (2FA, remote mode)

In remote mode you can additionally protect your account with two-factor authentication (TOTP). You will find the management under **Settings → User Management → Manage 2FA**:

1. **Install an authenticator app:** e.g. Google Authenticator, Microsoft Authenticator or Authy (free in the App Store / Google Play)
2. **Confirm with your account password:** a QR code will then appear
3. **Scan the QR code** and enter the displayed 6-digit code, done
4. **Save your recovery codes:** they are only shown once. Keep them safe (e.g. password manager or printout)

After activation, HIVE asks for a 6-digit code from your authenticator app at every login in addition to your password. If you do not have access to the app, you can use one of your recovery codes instead; each code works only once. Deactivation takes place in the same location and also requires password and code.

Tip:: **Note:** 2FA applies to your HIVE web account and thus protects both the login in the desktop application (remote mode) and the login to the HIVE web app in the browser.

WhatsApp

Message Templates

Under **Settings → Email & Calendar → Message Templates**, customize the message texts used when sending documents via WhatsApp: one template each for invoices, quotations, order confirmations, and reminders.

Integrations

Webhooks

With webhooks you can connect HIVE to external systems. When certain events occur, the application automatically sends an HTTP notification to your server.

Configure webhooks:

1. Go to **Settings → Webhooks**
2. In the Webhooks section:

- **Webhooks active:** Enable the feature
- **Webhook URL:** Enter the recipient URL
- **Select events:** Which events should trigger webhooks?
- **Secret (optional):** For HMAC-SHA256 signature authentication

Available events:

Event	Description
Invoice created	New invoice saved
Invoice updated	Existing invoice changed
Invoice paid	Payment recorded
Customer created	New customer added
Customer updated	Customer data changed
Quotation created	New quotation saved
Quotation updated	Existing quotation changed
Reminder created	New reminder generated

Use the "Send Test" button to verify that your server correctly receives the request. The response is displayed immediately.

> Tip:: Webhooks are sent in the background and never block the user interface. Temporary failures automatically trigger a retry.

Connect an AI assistant

In the HIVE Web App, every user can connect their own AI assistant, for example Claude, to their HIVE account. The assistant then works in HIVE on request: it searches customers and the catalog, creates quotations and invoices with items from the catalog, and can use all other functions of the Web App that you may use yourself.

Requirements

- A HIVE web account or the desktop application in Remote mode (the data is then held in the same dataset as in the web app)
- An AI assistant that supports custom connectors (MCP)

HIVE does not provide its own AI, so HIVE charges no AI costs.

How to connect the assistant

1. In the HIVE Web App, open **Settings → AI assistant** and copy the address. It is `https://app.inatsolutions.ch/api/mcp`
2. In your AI assistant, add a custom connector and paste the address (in Claude: **Settings → Connectors → Add custom connector**)
3. Click **Connect**, sign in with your usual HIVE login and confirm on the HIVE page **Connect AI assistant** with **Connect**. The page shows which assistant wants access, the company, the signed-in user and the role. You can only confirm in the same browser in which you started the connection
4. In the AI assistant, write what it should do, for example: "Create a quotation in HIVE for customer Müller: 4 winter tyres, fitting and disposal from the catalog."
5. Whatever the assistant creates or changes appears in the open HIVE list on its own. If an entry is missing, reload the page (**F5**)

What the assistant may do

The assistant may do everything the connected user may do in HIVE (that user's role applies) and only within their own company. Exception: it can only read the change log, the settings, the email templates, import, user management, the automatic payment reminders and the Microsoft connection for calendar and email, not change them. Prices in quotations and invoices that it creates from the catalog always come from the catalog. It creates quotations as drafts. Invoices are created with the status "open", as usual in HIVE; catalog items deduct stock in the process.

You receive PDFs, for example a quotation or an invoice, from the assistant as a download link that is valid for ten minutes. The file itself is not transferred to the assistant.

The assistant can only send emails to addresses that are stored in HIVE for a customer or supplier. HIVE rejects other addresses; first enter a new address on the customer or supplier.

Whatever the assistant changes appears in the change log with the suffix "[KI: ...]".

What is not possible

- Changing the password and two-factor authentication
- Subscription and payment
- Managing users (read only)
- Changing settings, email templates, import, automatic payment reminders, the Microsoft connection and the change log (read only)
- Deleting the company account or restoring a backup
- File uploads

Security and privacy

- Only connect if you have just started the connection yourself in your own AI assistant. If someone opens a connection link that was sent to them, HIVE shows a warning and only **Cancel**. Never confirm a link that someone sent you
- Data the assistant retrieves goes to the provider of the AI assistant. You decide which assistant you connect
- Check documents in HIVE before you send them
- The assistant only deletes or sends on your explicit request. Many assistants also ask before making changes

Disconnecting

Open **Settings → AI assistant** and click **Disconnect** under **Connected AI assistants**. The assistant loses access immediately. There you can also see which assistants are connected and since when. A password change in HIVE immediately disconnects all AI connections of that user. Anyone who turns two-factor authentication on or off, or changes the password, is signed out on other devices; connected AI assistants must be connected again afterwards. A connection that is not used expires after 90 days.

License

Here you will find all information about your license:

- Current license status and plan (**Starter**, **Plus** or **Pro**, or **Standalone** for pure desktop use without cloud)
- Validity date and remaining days
- Connect account with HIVE
- Enter and activate license key
- Manage subscription and payment method

Trial Period and Renewal

- New accounts start with a **free 45-day trial** with full functionality

- Annual subscriptions equal 10 monthly payments, two months free
- If a subscription has expired, you can still log in: open **Settings → Subscription & Payment** to renew the subscription via the payment portal. Your data remains fully intact

Downgrading to a smaller plan

When you change to a smaller plan in the payment portal, your workspace remains on its current plan for **30 days**. Existing members are **not deactivated automatically**. However, new members and pending invitations immediately follow the seat limit of the target plan.

After the grace period, HIVE checks the seats in use, including still-valid invitations. If the count is within the target plan's limit, the change is completed. If it is above the limit, your current plan remains active and the change is blocked. Remove seats or pending invitations, or select a larger plan; HIVE completes the change as soon as the target limit is met.

The person assigned to billing receives an email in their account language (German, English, or French) when the grace period begins and when the change is blocked or completed.

13. Keyboard Shortcuts

Combination	Function
Ctrl+K	Open quick search
Ctrl+N	Create new entry
Ctrl+S	Save
Ctrl+P	Create PDF
Ctrl+E	Send by email
Ctrl+D	Duplicate entry
Ctrl+B	Create backup
Ctrl+,	Open settings
Ctrl+1 to 9	Switch directly to tab
F1	Open context-sensitive help
Ctrl+/	Show keyboard shortcuts overview
F5	Refresh current view
Enter	Trigger the main action in a dialog when it is unambiguous (Save, Apply, Next)

Tip:: **Note:** Actions that send something or create a document (send email, create reminder, quick invoice, bill hours, start import, purchase) are never triggered with Enter, only by clicking.

14. Frequently Asked Questions

Where is my data stored?

In local mode, encrypted under %LOCALAPPDATA%\INAT Solutions\ on your computer. In remote mode on our secured server, where the desktop application and the HIVE web app access the same data.

How do I create a backup?

Press Ctrl+B or open Settings, then **Data & Backup** and **Data Backup**. HIVE also creates a local initial backup automatically on the first login. We still recommend weekly backups afterwards.

For the cloud backup and the full export, HIVE asks for your account password for security reasons, and additionally for the code if two-factor sign-in is enabled. When the desktop application is connected to the server, HIVE no longer creates the cloud backup silently in the background: if a cloud backup is due, a notice for administrators appears at program start, and the backup starts once you have entered your password. It is due as long as no cloud backup exists yet, and afterwards every 7 days when automatic backup is switched on. If you choose "Later" in the notice, it reappears on this device after 7 days at the earliest. While a cloud backup is running, HIVE cannot be closed; you will receive a message as soon as it has finished. Older desktop versions must be updated for the cloud backup.

Where can I find the guided first path again?

The guided tour is offered to all users after setup, regardless of the start profile. It walks you through customers, quotations, invoices, accounting, the search (Ctrl+K) and the data backup. You can restart the tour via the **First steps** card on the dashboard, via **Help & Support** or in **Settings** under **Help**. In the simple entry, the **First steps** card additionally shows the next open step (customer, first invoice, first payment, backup) for as long as those are still incomplete.

Why should I create a web account and connect my device?

A web account clearly assigns your HIVE installation to your online account. This keeps license status, subscription, and portal access aligned, makes connected devices visible, and makes device changes or support cases much easier to handle.

The PDF export reports "QR-IBAN is missing"?

Check the QR Invoice Data under Settings, Invoices. Without a valid QR-IBAN, HIVE deliberately creates no PDF, so that no payment slip pointing to a stranger's account can be produced. As soon as IBAN and QR-IBAN are correctly stored, the export runs normally again.

Why can't I edit the footer in the Document Designer?

Because it is always generated from your company data, every document carries the same footer. Change the company name, slogan, address, contact details or bank details under **Settings → Company**, and the footer changes on all documents with it.

How do I change VAT rates?

Under Settings, Company you will find the VAT configuration with all rates.

How do I import existing customer data?

You can import customer data directly in the **Customers** area via **Import Customers**. The wizard accepts **CSV**, **Excel (.xlsx)** and **vCard/VCF** files, blocks files above **10 MB**, **10,000 data rows**, or more than **5 Excel worksheets**, and guides you through preview and field mapping.

Where do I find log files in case of problems?

Under %LOCALAPPDATA%\INAT Solutions\logs\ all activities are logged.

How do I use the online manual and website forms most effectively?

Open https://inatsolutions.ch/docs and use the chapter search to filter topics immediately. On chapter pages, the overview and the previous/next chapter navigation help you move through the manual. For offline access, the overview page provides full PDF downloads in German, English, and French.

The website is fully keyboard accessible: use Tab and Shift+Tab to move between links and form fields, and Enter to trigger links and buttons. Form fields are labeled, required fields are clearly marked, and status messages appear immediately after submission.

What happens if the application crashes unexpectedly?

If an unexpected error occurs, the Crash Report dialog appears automatically. You can choose whether to send anonymised error data to INAT Solutions to help improve the software. The data does not contain any personal or business information. Local crash logs can be found under %LOCALAPPDATA%\INAT Solutions\crash_logs\.

Can I connect an AI assistant such as Claude to HIVE?

Yes. In the HIVE Web App you can connect your own AI assistant, for example Claude, to your account through a connector. The assistant may then work in HIVE within your role, for example create quotations and invoices from the catalog. It can only read settings, email templates, import, user management, automatic payment reminders, the Microsoft connection and the change log; password, 2FA, subscription and deleting the account stay blocked. Never confirm a connection through a link that someone sent you. The steps are under **Settings → Connect an AI assistant**.

15. Support and Contact

Online Help

www.inatsolutions.ch

https://inatsolutions.ch/docs

PDF downloads: Benutzerhandbuch_DE.pdf, User_Manual_EN.pdf, Manuel_FR.pdf

Support Bundle

Open **Help & Support > Support Bundle** to preview a redacted diagnostics package. Export stores a local JSON file with app, system, database, and runtime diagnostics plus redacted log excerpts.

It does not include customer, invoice, or contact data, database contents, credentials, tokens, passwords, or absolute user paths.

Email Support

info@inatsolutions.ch

We usually reply within one business day

Contact Form

https://inatsolutions.ch/#contact

Keyboard and Forms on the Website

Use Tab and Shift+Tab to move between links and form fields, and Enter to activate buttons and links. Required fields are clearly labeled and feedback appears right after submission.

Training

For training requests and follow-up questions, contact info@inatsolutions.ch.

Copyright 2026 INAT Solutions. All rights reserved.