
HIVE

User Manual

Business Management Software for SMEs

Invoices • Quotations • Customer Management

Accounting • VAT Settlement • Reports

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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.

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	Projects, Vehicles, Tire Storage, Time Tracking (individually activatable)

System Requirements

Component	Minimum	Recommended
Operating System	Windows 10	Windows 11
Operating System (macOS)	macOS 12 Monterey	macOS 14 Sonoma
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.com 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.

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.

You also choose a **start profile** right at the beginning through the welcome area:

- **Solo business** - the first main card for the focused entry. HIVE initially hides optional modules and concentrates on customers, quotations, invoices and payments.
- **Advanced setup** - the second main card for the full shell without the simplified focus mode.
- **Optional for teams** - if you choose the focused entry, you can enable time tracking directly below the cards. The calm entry remains, but time tracking becomes visible immediately and the **Small team** profile is activated.

In the **Solo business** and **Small team** profiles, a persistent **First steps** card appears on the dashboard after the wizard. It guides you through customer, first invoice, payment, and backup; the guided tour remains available as extra orientation.

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

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.

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 **Solo business** start profile in the setup wizard, HIVE starts with a calmer shell: optional modules stay hidden at first and the quick invoice is not highlighted immediately as a floating action. In the **Small team** profile, time tracking remains 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.

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. 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.

4. Customer Management

Creating a New Customer

Open the Customers area and click the New 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, 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
- 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 New 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 INV-YEAR-SEQUENCE, for example INV-2026-0001. Credit notes use the same mechanism with the CN prefix.

Tip:: Invoice layout, logo position and footer text can be customized individually.

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.

Tip:: For correct QR invoices, IBAN and QR-IBAN must be stored.

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
Yellow	Open, due date not yet reached
Orange	Due today or partially paid
Red	Overdue - reminder recommended

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. Open the quick search with **Ctrl+K** or use the menu entry
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. Later they return 1 more chair — you can then 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 2–12 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** (2–12, 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 = overdue, Gray = cancelled
4. Click **Pay Installment** for the next due installment
5. If needed, you can cancel the entire plan via **Cancel**

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 New Quotation. 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:: The quotation layout can be designed separately from the invoice layout.

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
Convert to Invoice	Creates an invoice from the quotation
Create Order Confirmation	Generates a formal order confirmation from the quotation
Change Status	Manual status change
Delete	Removes the quotation

Converting Quotation to Invoice

This time-saving function takes over all data:

1. Right-click on a quotation
2. Select Convert to Invoice
3. Confirm the action

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 quotation is marked as Accepted

Quotation Status

Status	Meaning
Draft	Still being edited, not sent
Active	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).

Create an order confirmation:

1. In the Quotations tab: Right-click on a quotation
2. Select **Create Order Confirmation**
3. The OC takes over all data from the quotation (customer, items, discounts, and amounts)
4. An OC number is automatically assigned (e.g. AB-2026-0001)
5. You can edit the OC, export it as PDF or send it by email

Convert order confirmation to invoice:

1. In the Quotations tab: Filter by **Order Confirmations** in the document type filter
2. Right-click on the OC → **Create as Invoice**
3. All items and discounts are transferred to a new invoice
4. The OC is marked as "Accepted"

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 → Invoice

Status	Meaning
Draft	OC created, not yet sent
Accepted	Invoice was created from the OC
Cancelled	OC was manually cancelled

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 10.-
2	Second Reminder	30 days	CHF 20.-
3	Final Reminder	45 days	CHF 30.-

Tip:: The reminder fees for each level can be individually adjusted.

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.

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 New Entry:

For **Solo business** and **Small team**, 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 assigned automatically when you save. New entries and entries prepared from a receipt scan therefore do not have an editable number field; existing entries show the number as read-only.

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.

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
- **Open Items:** Overview of all unpaid invoices with due dates
- **Revenue Overview:** Income and expenses by period
- **Customer Statistics:** Revenue per customer

Reports can be exported as PDF or printed directly.

9. Service Catalog

Managing Entries

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

- Name and description
- Unit (piece, hour, flat rate, etc.)
- Price per unit
- VAT rate
- Optional: Category for grouping

Organizing Categories

Right-click in the category tree allows:

- Add Category - Create new grouping
- Edit Category - Change name
- Delete Category - Remove (only if empty)

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

10. Calendar, Suppliers & Email

Calendar

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

Tip:: Optionally, you can synchronize your Outlook calendar. Appointments are synchronized bidirectionally. 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**.

Projects Module

Optional for project-oriented businesses:

- Project management with phases and milestones
- Work reports per project and employee
- Project-related invoicing

Vehicles Module

Optional for businesses with vehicle workflows:

- Vehicle management (license plate, VIN, owner)
- Complete service history per vehicle

Tire Storage Module

Optional for seasonal tire operations:

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

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:** Target hours per week, hourly rate
- **Status:** Active/Inactive/Resigned — inactive employees do not appear in dropdowns
- **Notes:** Additional information about the employee

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

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

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
- **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"

Integration with Other Modules

The Time Tracking module is seamlessly integrated into the application:

- **Dashboard:** Time tracking KPIs (active employees, weekly hours, today's absences) are displayed as cards on the dashboard
- **Projects:** A "Hours" column with hours worked per project is displayed in the project 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

Settings are divided into eight main areas with respective sub-items.

General

Language

Choose between Deutsch, English and Francais. The change takes effect immediately and 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
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
Country	Determines currency and VAT suggestions
Currency	CHF or EUR for all amounts

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.

Invoices

QR Payment 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)

Layout Adjustments

Open **Settings** → **Customize Invoice Layout**. The dialog is organized into three tabs: **Design**, **Texts**, and **Logo**.

Design

- Pick a style template from several presets (various color and font combinations)
- 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
- Choose the accent color from swatches in the curated palettes or open **+ Custom Color** for an individual choice via color picker (Hex, HSV, palette)
- Define the primary color for headings

Texts

- Store header and footer text
- Set default payment terms
- Adjust additional invoice texts and microcopy

Logo

- **Anchor Grid (3x3):** 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.

Quotations

Layout Adjustments

The quotation layout uses the same editor as the invoice layout — available under **Settings** → **Customize Quotation Layout**. It is likewise organized into **Design**, **Texts**, and **Logo** with anchor grid, drag-and-drop preview, font dropdown with preview directly in the document, custom color picker, and an "Advanced" section for millimeter-precise fine-tuning. Saving is also confirmed with a checkmark feedback, and "Discard changes" is confirmed before execution.

Additionally for quotations:

- Default validity period in days
- Footer text with your quotation conditions

Reminder System

Configure 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 10.-
Level 2	Urgent reminder	CHF 20.-

Level 3	Final reminder before collection	CHF 30.-
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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

Here 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

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.

System

User Management

Manage access to the application:

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

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.*

Optional Modules

Activate or deactivate optional functional areas:

- Projects module for project management and reports
- Vehicles module for vehicle management
- Tire storage module for storage/retrieval and seasonal planning
- Time tracking module for working time recording and hour billing

After activation, the new areas appear in the navigation.

Calendar Integration

Connect your Microsoft account for Outlook synchronization. Appointments are synchronized bidirectionally.

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

Email Templates

Create reusable templates for:

- Invoice sending
- Quotation sending
- Reminders of each level

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

Database

Choose between two modes:

- Local (SQLite): All data on this computer, no internet needed
- Cloud (PostgreSQL): Data synchronized to server, access from multiple devices

Database Synchronization

In cloud mode, you can synchronize your local database with the server. The synchronization dialog shows the current status, last synchronization time and any conflicts. Synchronization can be triggered manually or run automatically in the background.

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 must use a 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
- Set backup location (local folder or network drive)
- Restore backup from file
- Configure automatic reminder (weekly recommended)

*Tip:: **Note for cloud mode:** The backup only secures your local database copy. Make sure synchronisation with the server is up to date before performing a restore.*

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.
- **Show Archive** — Switches to the view of archived entries (older than 10 years).
- **Archive Now** — Moves all entries older than 10 years to the long-term archive. The regular log area remains clear and manageable.

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** → **System**
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.

License

Here you will find all information about your license:

- Current license status and type (Trial, Standard, Pro)
- Validity date and remaining days
- Connect account with HIVE
- Enter and activate license key
- Manage subscription and payment method

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+/ F5	Show keyboard shortcuts overview
F5	Refresh current view

14. Frequently Asked Questions

Where is my data stored?

In local mode under %LOCALAPPDATA%\INAT Solutions\. In cloud mode on our secured server with local copy.

How do I create a backup?

Press Ctrl+B or open Settings, then System and Data Backup. We recommend weekly backups.

Where can I find the guided first path again?

In the **Solo business** or **Small team** start profile, the dashboard shows a **First steps** card. From there you can jump directly to customer, first invoice, payment, and backup; you can also restart the tour via Help & Support.

The QR invoice shows no code?

Check the QR Payment Data under Settings, Invoices. IBAN and QR-IBAN must be correctly stored.

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.com/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\.

15. Support and Contact

Online Help

www.inatsolutions.com

<https://inatsolutions.com/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.com

We usually reply within one business day

Contact Form

<https://inatsolutions.com/#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.com.

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