

Customer documentation

Complete documentation of Orafilea, the platform with built-in artificial intelligence for companies that sell, install and support software: what it does, how it is installed, configured and managed, and what to know before adopting it.

October 2026

Orafilea

Demo Software Srl

Dashboard

Tickets9

Inbox1

Customers9

Calendar

Sales

Customer orders1

Invoices and receipts1

Purchasing and stock

Suppliers

Supplier orders1

Products and stock1

Order tracking

Administration

Income and expenses1

Accounting

Employees and absences1

Reports

Dashboard

Good morning, Giulia

New ticket

Open tickets

922

To work onSLA at riskSLA breachedWaiting

Open the ticket list

My tickets

Ticket	Subject and customer	Status	Service times
TCK-204	Cedolini del mese non generati: errore "Periodo chiuso" Officine Lario Srl	In progress	Resolution3 h working time left
TCK-196	Le ore di straordinario notturno non arrivano alle paghe Officine Lario Srl	In progress	Resolution7 h 12 min working time left
TCK-202	Contratto collettivo dell'autotrasporto per i nuovi autisti Dolomiti Trasporti Srl	In progress	Resolution34 h working time left

Unassigned

Ticket	Subject and customer	Priority	Received
TCK-206	Richiesta formazione sul nuovo modulo magazzino Cooperativa Agricola Valle Verde	Low	27 Oct, 10:59
TCK-205	Errore di connessione al database dopo il riavvio del server Logistica Adriatica Spa	Urgent	27 Oct, 10:31
TCK-203	Accesso al portale cedolini per i nuovi assunti Dolomiti Trasporti Srl	Normal	27 Oct, 09:43

In the company today

Help with this page14

Contents

- 1. **Overview** · What it is, who it is for, the problems it solves, principles, what it does not do
- 2. **Features** · Every module with its rules, with screenshots
- 3. **Roles and permissions** · The 23 permissions, the 7 default roles, the visibility rules
- 4. **Artificial intelligence** · AI features, providers and agents, costs and budget, data sent, how to turn it off
- 5. **Security and privacy** · Technical measures, backups, data processed, GDPR roles, sub-processors
- 6. **Requirements and architecture** · Browser, server, network, components, technologies
- 7. **Installation** · Delivery options, step-by-step installation, external database, configuration
- 8. **Getting started** · From the first sign-in to the first working day, with checklists
- 9. **Operations and maintenance** · Checks, updates, backup and restore, incidents, user support
- 10. **Integrations** · IMAP/SMTP mail, HTTP gateway, Fatture in Cloud, AI, CSV, PDF
- 11. **Specifics and limitations** · Intended rules, Italian specifics, current limitations, planned developments
- 12. **Frequently asked questions** · Short answers to the most common questions
- 13. **Glossary** · The terms used in the application, with the Italian equivalent

The user manual, with all the procedures step by step, is a separate document.

Overview

For whom: Owners, management

Orafila

Demo Software Srl

Dashboard

Tickets3

Inbox1

Customers3

Calendar

Sales

Customer orders1

Invoices and receipts1

Purchasing and stock

Suppliers

Supplier orders1

Products and stock1

Order tracking

Administration

Income and expenses1

Accounting

Employees and absences1

Reports

Dashboard

Good morning, Giulia

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9222

To work onSLA at riskSLA breachedWaiting

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Ticket	Subject and customer	Priority	Received
TCK-206	Richiesta formazione sul nuovo modulo magazzino Cooperativa Agricola Valle Verde	Low	27 Oct, 10:50
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In the company today

Help with this page14

Orafila dashboard

In one sentence

Orafila is business management software with built-in artificial intelligence for companies that **sell, install and support software**: helpdesk, customers and contracts, sales, invoices, purchasing, stock, basic accounting, people and calendar in a single web application, with an assistant that explains how things are done and helps you understand what is wrong.

Who it is for

- **Software houses, resellers and partners of business software** (ERP, payroll, software for professional firms), **system integrators** and **MSPs**.
- Companies with 5 to 150 employees, with 3 to 60 people working in support, sales and administration.
- Designed for **Italy**: interface in Italian (and in English), working calendar with the national holidays, VAT number and codice fiscale (tax code) with validation, VAT by rate, e-invoices to the SDI (Sistema di Interscambio, the Italian e-invoicing exchange) through Fatture in Cloud, automatic contract renewal and ISTAT adjustment (Italian inflation index).

The problems it solves

A company of this kind usually works with 4-6 disconnected tools: a shared mailbox for support, Excel sheets for hour banks, the management software for contracts and invoices, a calendar, scattered notes on customers. The consequences are well known:

Problem	How Orafila tackles it
Support hours not logged or not deducted from the hour bank	The time worked on each ticket is deducted from the customer's hour bank with the company's minimums and rounding; the dashboard warns when an hour bank is running out and forecasts the date
Support e-mails sorted by hand	E-mails from recognised customers become tickets by themselves, replies go back into the right ticket, the AI suggests category, priority, product and agent
Response times not measured	Service times (SLA) by priority, calculated in working hours with the holidays; list sorted by urgency, progress bars, at-risk and breached alerts
Cancellations discovered too late	Contracts with automatic renewal, notice period and the last date to cancel worked out; customers to follow up on the dashboard 60 days ahead; customer health score
Orders, invoices and payments in tools separate from support	Customer orders, invoices with gap-free numbering, payments with receipts, supplier orders and stock in the same application, linked to the customer page
Newcomers do not know how things are done	On every page the "Help with this page" button explains what the section is for, what needs fixing and how to do things, step by step

What it includes

Area	Modules
Support	Tickets with service times, inbox and sorting, queues with mailboxes, hour bank and ticket allowance, company and group calendars
Customers	Customer records with a 360° view: customer health, contracts and cancellations, hour banks, installed products with version, contacts and sites, orders and invoices; import from Excel/CSV
Sales	Customer orders with PDF confirmation, shipment and tracking; invoices and receipts with PDF, printing and e-mail; e-invoices and sending to the SDI through Fatture in Cloud
Purchasing and stock	Suppliers, supplier orders with partial deliveries, products with prices and VAT, stock on hand, reorder level with alert, single tracking view of open orders
Administration	Income and expenses (cash book) with accounts and due dates, basic accounting (profit and loss, indicative VAT, amounts owed by customers and to suppliers), employees and absences, reports with CSV export
Company	Users with mandatory two-step verification, customisable roles and permissions, activity log, settings, e-mail notifications, artificial intelligence with a budget
AI assistant	On every page: explains, checks the status of the modules, answers questions by looking at the data the person's role can see

The details of each module are in [Features](#); the step-by-step procedures are in the [user manual](#).

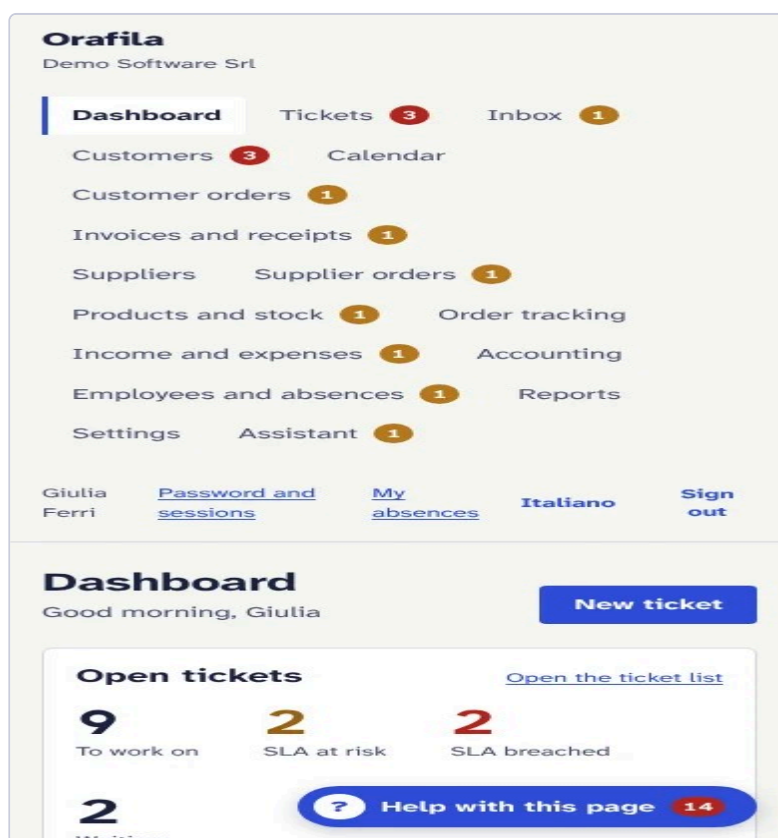
The product's principles

1. **AI suggests, people decide.** No e-mail written by the AI goes out and no data changes by the AI's decision without a person's click. The AI sorts, writes drafts and summarises; the people at work check and confirm.
2. **The AI does not calculate the numbers.** Totals, VAT, service times, hour bank balances, due dates and scores are calculated by precise rules verified by automated tests; the AI receives them already calculated and explains them.

3. **It also works without AI.** Without a key from an AI provider, with the AI turned off or with its budget used up, every feature has its manual alternative; the guides and the health checks always work.
4. **Each company's data is kept apart by the database itself.** Several companies can share the same installation: isolation is enforced by PostgreSQL (Row-Level Security), not only by the application code.
5. **Secure by default.** Two-step verification mandatory for everyone, encrypted secrets, an activity log that cannot be changed, encrypted backups, automatic HTTPS.
6. **Configuration, not code.** Rates, service times, categories, holidays, roles, queues and mailboxes are set from the interface, company by company.

How it is used

- **Web application:** used from the browser, with nothing to install on computers. Pages adapt to phones and tablets (tables become cards, the calendar has a list view).
- **Italian and English:** everyone chooses the interface language; PDF documents and e-mails to customers and suppliers come out in the document language chosen by the company.
- **In the cloud or on your server:** Orafila is installed on a single Linux server with Docker, with HTTPS, encrypted nightly backups and updates with one command. It can be provided as a managed service or installed on a server dedicated to the customer (see [Installation](#)).



Orafila on a phone

What Orafila is not (today)

To be fair, here is what it does **not** do in the current version (details in [Specifics and limitations](#)):

- it does not replace your accountant's official accounts: the basic accounting is there to keep the situation under control, and the VAT is indicative;
- it does not send invoices to the SDI by itself: it does so through **Fatture in Cloud** (or through your intermediary, starting from Orafila's data); credit notes are issued in the e-invoicing software;
- it does not yet have a portal for end customers or sign-in with Microsoft 365 or Google (SSO);

- it does not import e-mail attachments (the ticket shows the names of the attached files);
- projects, visit reports, quotes and the update plan already have their calculation rules but not yet their pages.

Features

For whom: Management, department heads

This document describes what each Orafila module does and the rules it follows. The step-by-step procedures, with the exact names of buttons and fields, are in the [user manual](#). Which modules a person sees depends on their role: see [Roles and permissions](#).

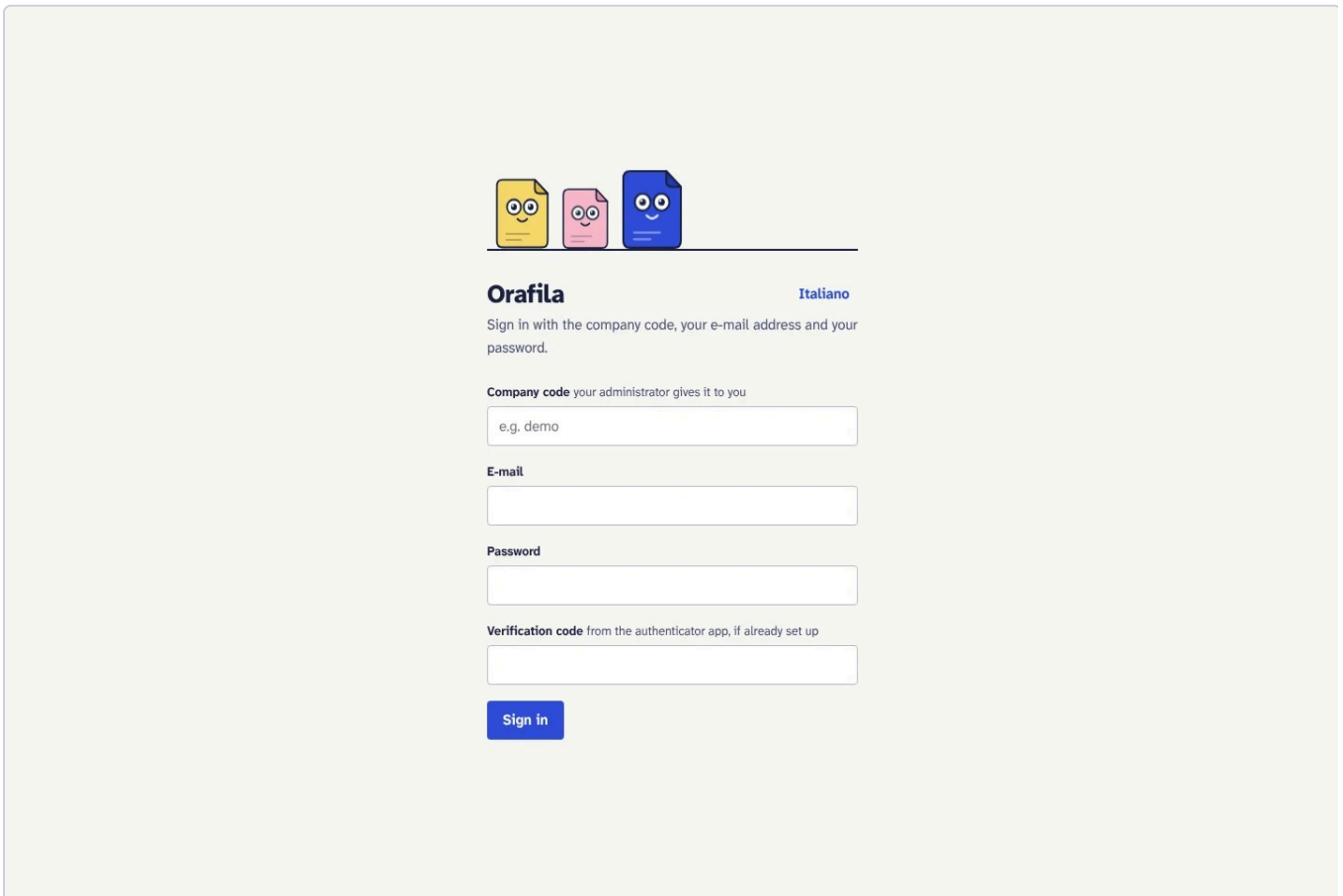
Contents

1. Structure of the application
 2. Sign-in and user security
 3. Dashboard
 4. Tickets
 5. Inbox and mail queues
 6. Customers and the 360° view
 7. Contracts, hour banks and ticket allowance
 8. Calendar
 9. Customer orders
 10. Invoices and receipts
 11. E-invoicing with Fatture in Cloud
 12. Suppliers and supplier orders
 13. Products and stock
 14. Order tracking
 15. Income and expenses
 16. Accounting
 17. Employees and absences
 18. Reports
 19. Assistant and help on every page
 20. Settings
 21. E-mail notifications and PDF documents
 22. Languages
-

1. Structure of the application

- **Side menu:** Dashboard, Tickets, Inbox and Customers appear to everyone (if the role does not allow them, the page explains this); the other sections appear only to people who can use them: Calendar; **Sales** (Customer orders, Invoices and receipts); **Purchasing and stock** (Suppliers, Supplier orders, Products and stock, Order tracking); **Administration** (Income and expenses, Accounting, Employees and absences, Reports); then Settings (administrators only) and Assistant.
- At the bottom of the menu: the person's name, **Password and sessions**, **My absences** (for people with an employee record), the language button (**English / Italiano**) and **Sign out**.
- Next to the menu items, a **number** flags the problems (red) and the things to check (orange) found by the automatic checks in that section.
- At the bottom right of every page, the **“Help with this page”** button opens the assistant beside the page.
- Each company sees only its own data; several companies can work in one installation, each with its own **company code**.

2. Sign-in and user security

The image shows the Orafila sign-in page. At the top, there are three cartoon icons of documents (yellow, pink, and blue) with faces. Below them is the Orafila logo and a language selector set to 'Italiano'. The main heading is 'Orafila' followed by the instruction 'Sign in with the company code, your e-mail address and your password.' The form contains four input fields: 'Company code' (with a hint 'your administrator gives it to you' and an example 'e.g. demo'), 'E-mail', 'Password', and 'Verification code' (with a hint 'from the authenticator app, if already set up'). A blue 'Sign in' button is at the bottom.

Sign-in page

- **Sign-in** with company code, e-mail and password. The password has **at least 12 characters**.
- **Two-step verification, mandatory for everyone** (TOTP, with Google Authenticator, Microsoft Authenticator or similar apps), turned on at the first sign-in with a QR code generated by the application itself, without external services. Each code works only once.
- **Protection against repeated attempts:** after 5 wrong attempts (password or code) sign-in is locked for 15 minutes; the error message does not say which of company code, e-mail and password is wrong.
- **Sessions** of 12 hours, stored on the server. In **Password and sessions** everyone changes their own password (after confirming the current one), sees which devices they are signed in on (device, date, IP address, expiry) and can sign out of all other devices. Changing the password closes the other sessions.
- **Invitations:** an administrator invites colleagues with a personal link, valid for 7 days and usable once; the person chooses a password and turns on two-step verification. The link is copied and passed on through a secure channel (Orafila does not send it by e-mail).
- **Forgotten password:** there is no automatic recovery by e-mail, as a security choice. An administrator resets the access and creates a new invitation. In the same way an administrator resets two-step verification for someone who changes phone, and unlocks anyone who is locked out.

Turn on two-step verification

To protect customer data, every sign-in also needs a code generated by your phone. Install an authenticator app (Google Authenticator, Microsoft Authenticator or similar), then scan the QR code.



If you cannot scan the QR code, type this key into the app by hand:

KJ2Y WJED MAB4 4H2V H5RA CGGR
YQN4 4LHX

6-digit code shown by the app

Turn on two-step verification

Turning on two-step verification

3. Dashboard

Orafilea
Demo Software Srl

Dashboard

Tickets 3

Inbox 1

Customers 3

Calendar

Sales

Customer orders 1

Invoices and receipts 1

Purchasing and stock

Suppliers

Supplier orders 1

Products and stock 1

Order tracking

Administration

Income and expenses 1

Accounting

Employees and absences 1

Reports

Dashboard
Good morning, Giulia

New ticket

Open tickets
9 To work on 2 SLA at risk 2 SLA breached 2 Waiting

[Open the ticket list](#)

My tickets

Ticket	Subject and customer	Status	Service times
TCK-204	Cedolini del mese non generati: errore "Periodo chiuso" Officine Lario Srl	In progress	Resolution 3 h working time left
TCK-196	Le ore di straordinario notturno non arrivano alle paghe Officine Lario Srl	In progress	Resolution 7 h 12 min working time left
TCK-202	Contratto collettivo dell'autotrasporto per i nuovi autisti Dolomiti Trasporti Srl	In progress	Resolution 34 h working time left

Unassigned

Ticket	Subject and customer	Priority	Received
TCK-206	Richiesta formazione sul nuovo modulo magazzino Cooperativa Agricola Valle Verde	Low	27 Oct, 10:50
TCK-205	Errore di connessione al database dopo il riavvio del server Logistica Adriatica Spa	Urgent	27 Oct, 10:31
TCK-203	Accesso al portale cedolini per i nuovi assunti Dolomiti Trasporti Srl	Normal	27 Oct, 09:43

In the company today

?

Help with this page

14

Dashboard

The home page says what needs doing today. The panels depend on the role:

- **Open tickets:** to work on, service times at risk, breached, waiting.
- **My tickets,** the most urgent at the top, with the service time bar.
- **Unassigned:** tickets without an agent.
- **Customers to follow up:** hour bank or ticket credits running out, cancellation deadlines within 60 days, cancellations to win back.
- **In the company today:** customer orders that are late or waiting to ship, late supplier orders, overdue invoices and invoices to collect, products to reorder, absence requests and people who are away, each with the link to the page where you act.
- **AI assistant:** the status of the AI and, for administrators, the month's AI spend against the budget.

4. Tickets

Orafila

Demo Software Srl

Dashboard

Tickets 3

Inbox 1

Customers 3

Calendar

Sales

Customer orders 1

Invoices and receipts 1

Purchasing and stock

Suppliers

Supplier orders 1

Products and stock 1

Order tracking

Administration

Income and expenses 1

Accounting

Employees and absences 1

Reports

Tickets

9 tickets to work on

New ticket

View

Assignee

Priority

Search

To work on

Everyone

All

Subject or customer

Apply filters

Ticket	Subject and customer	Priority	Status	Assignee	Service times
TCK-197	Fatturazione molto lenta dopo l'aggiornamento Tessiture Biellesi Srl	High	In progress	Sara Conti	Resolution Over by 4 h working time
TCK-205	Errore di connessione al database dopo il riavvio del server Logistica Adriatica Spa	Urgent	New	Unassigned	First response Over by 18 min working time
TCK-199	I rilevatori presenze del magazzino 2 non scaricano le timbrature Logistica Adriatica Spa	High	In progress	Sara Conti	Resolution 2 h 53 min working time left
TCK-204	Cedolini del mese non generati: errore "Periodo chiuso" Officine Lario Srl	Urgent	In progress	Giulia Ferri	Resolution 3 h working time left
TCK-203	Accesso al portale cedolini per i nuovi assunti Dolomiti Trasporti Srl	Normal	New	Unassigned	First response 6 h 24 min working time left
TCK-196	Le ore di straordinario notturno non arrivano alle paghe Officine Lario Srl	Normal	In progress	Giulia Ferri	Resolution 7 h 12 min working time left
TCK-201	Preventivo per cinque licenze aggiuntive Tessiture Biellesi Srl	Low	Open	Luca Moretti	First response 9 h 36 min working time left
TCK-206	Richiesta formazione sul nuovo modulo magazzino Cooperativa Agricola Valle Verde	Low	New	Unassigned	First response 15 h 31 min working time left
TCK-202	Contratto collettivo dell'autotrasporto per i nuovi autisti Dolomiti Trasporti Srl	Normal	In progress	Giulia Ferri	Resolution 34 h working time left

Help with this page 3

Ticket list

Support requests, received by e-mail or logged over the phone.

List

- Views To work on, Waiting, Resolved and closed, All; filters by assignee and priority; search by subject or customer.
- Open tickets are **sorted by urgency**: first those past their time limit, then those close to it.

Details

- The resolution clock **stops** in the “Waiting for customer” status.
- Service time status: within limits, **at risk** (over 80% of the time used), **breached**, met.
- Default values (first response / resolution): Urgent 0.5 h / 4 h, High 2 h / 16 h, Normal 8 h / 40 h, Low 16 h / 80 h. They are changed in Settings > Company.

Time worked and charging

- You log minutes worked (from 1 to 1440) and travel minutes, billable or not.
- Billable time is **deducted from the customer's valid hour bank** that expires first, with the company's **rounding up** and **minimum charge per job** (15 minutes by default), and travel charged or not according to the rules.
- Time entries cannot be edited or deleted: they stay as a record.
- **Weight on the ticket allowance** (from 0 to 50): how many credits the ticket uses. A weight of 0 only with a reason (for example a software bug).
- **Ticket economics** (for people who see reports): internal cost (minutes × the agent's hourly cost) compared with revenue (billable minutes × rate), and the margin.

5. Inbox and mail queues

Orafila
Demo Software Srl

Dashboard

Tickets 3

Inbox 1

Customers 3

Calendar

Sales

Customer orders 1

Invoices and receipts 1

Purchasing and stock

Suppliers

Supplier orders 1

Products and stock 1

Order tracking

Administration

Income and expenses 1

Accounting

Employees and absences 1

Reports

Inbox

E-mails from recognised customers become tickets on their own. The ones the system cannot link to a customer or a ticket stay here.

The AI assistant is not set up: ask the administrator to enter the API key. Meanwhile e-mails are sorted and tickets created without the AI analysis.

To sort

3 e-mails to sort, oldest first.

Richiesta di preventivo per un gestionale
Sender info@ambulatorioaurora.example
Received 26 Oct, 09:19
Customer Not recognised

Buongiorno, siamo un ambulatorio veterinario con sei dipendenti e cerchiamo un programma per paghe e presenze. Potete mandarci un preventivo e dirci se fate formazione in sede? Cordiali saluti,
Ambulatorio Veterinario...

Customer Choose the customer Priority Normal Ticket number e.g. TCK-1042 Create the ticket Add to the ticket Ignore

Informazioni sul vostro programma paghe
Sender giorgio.bassi@studiobassi.example
Received 27 Oct, 08:19
Customer Not recognised

Buongiorno, sono consulente del lavoro e seguo alcune aziende che usano il vostro programma paghe. Mi serve sapere come esportare i cedolini in PDF divisi per dipendente. Potete richiamarmi? Giorgio Bassi

Customer Choose the customer Priority Normal Ticket number e.g. TCK-1042 Create the ticket Add to the ticket ? Help with this page 1

Inbox

How e-mails become tickets

- Each **queue** (for example Support) has its own mailbox: Orafila reads it via **IMAP** and sends via **SMTP**. Alternatively, a mail gateway can forward e-mails to the application (see [Integrations](#)).
- The **customer is recognised** by the address of one of its contacts or by the **e-mail domain** registered on its record. Free webmail and PEC (certified e-mail) domains (gmail.com, libero.it, pec.it and the like) never identify a customer; an address or domain registered for two customers is not assigned.
- **Replies** go back into the right ticket thanks to the reference in square brackets in the subject (for example [TCK-1042]) or to the message identifiers, even if the customer changes the subject.

- **Automatic replies** ("out of office") and bulk e-mails marked as such (header `Precedence: bulk` or `list`) are discarded; e-mails from mailing lists get no acknowledgement of receipt; duplicate e-mails are recognised and imported only once.
- The **acknowledgement of receipt** (optional, per queue) sends the customer the ticket number when an e-mail opens a new ticket.
- E-mails that Orafila cannot link stay in **Inbox** and are never deleted: you create the ticket by choosing the customer, add them to an existing ticket or ignore them (they can be recovered).
- With AI turned on, every ticket opened from an e-mail immediately gets the **triage suggestion**, which the agent applies or not.

Reading the mailboxes

Orafila
Demo Software Srl

Dashboard Tickets 3 Inbox 1 Customers 3 Calendar Sales Customer orders 1 Invoices and receipts 1 Purchasing and stock Suppliers Supplier orders 1 Products and stock 1 Order tracking Administration Income and expenses 1 Accounting Employees and absences 1 Reports

Company Document details Users Roles **Queues and mail** Notifications Fatture in Cloud Artificial intelligence 1 Products

Activity log

Queues and mail

Each queue receives requests at an e-mail address and numbers its tickets with its own prefix. Connect the queue's mailbox to turn incoming e-mail into tickets and send replies to customers.

Queue	Prefix	Mailbox	Last read	Outgoing e-mail
Assistenzaassistenza@demo.example	TCK	Not connected	Not reading	None waiting

Add a queue

Queue name for example Support or Development

Ticket prefix 1 to 5 letters, for example TCK: references become [TCK-1042]

☒ **Acknowledgement of receipt** When an e-mail opens a new ticket on its own and the queue's mailbox can send, the customer receives the ticket number. It is not sent for automatic replies, mailing lists or tickets opened by hand from the inbox.

Add the queue

How it works

Orafila reads each queue's mailbox about once a minute: customers' e-mails become tickets, replies that quote the ticket number go to the right queue by Orafila go to the right queue, e-mails that are discarded.

[? Help with this page](#)

Queues and mail

- The mail worker reads the mailboxes every minute (configurable on the server) and marks the imported e-mails as read: **nothing is moved or deleted** from the mailbox.
- The first time, it imports only the **50 most recent unread e-mails**, so as not to open a ticket for every old e-mail.
- **Attachments are not imported**: the ticket shows the names of the attached files.
- E-mails that fail to go out are retried after 1, 5, 15 and 60 minutes; after that the Queues and mail page lists them with the reason.
- **Protections**: no connections to internal network addresses, encrypted connections only, mailbox passwords encrypted, no loops of automatic replies between systems.

6. Customers and the 360° view

Orafilea

Demo Software Srl

Dashboard

Tickets3

Inbox1

Customers3

Calendar

Sales

Customer orders1

Invoices and receipts1

Purchasing and stock

Suppliers

Supplier orders1

Products and stock1

Order tracking

Administration

Income and expenses1

Accounting

Employees and absences1

Reports

Edilnord Costruzioni Spa

Code C0108 VAT number IT08901230964

Needs attention

Back to the customer list

Customer health

62

Needs attention

Score out of 100

Risks

- 2 SLAs missed in the last 90 days costs 16 points
- Tickets rising sharply (3 → 8 per quarter) costs 12 points
- Overdue invoices for €1,464.00 costs 10 points

Opportunities

No opportunities found.

The AI assistant is not set up: ask the administrator to enter the API key.

Orders and invoices

New order

New invoice

€98,608.33

€8,671.76

€1,464.00

Invoiced this year, VAT included

To collect

Overdue

Orders

Invoices

Order	Status	Total
ODV-39 30 Jul 2026	Delivered	€1,862.76
ODV-37 13 Jul 2026	Delivered	€861.32
ODV-34 21 May 2026	Delivered	€1,358.65

Invoice	Status	Total
204/2026 26 Oct 2026 · due on 25 Dec 2026	Unpaid	€1,493.28
192/2026 1 Oct 2026 · due on 30 Nov 2026	Unpaid	€439.20
180/2026	Unpaid	€3,782.00

Manage the customer

Edit the customer's details

Contacts and sites

Installed products

Ticket allowance

Customer details

PEC

edilnord@pec.example

E-mail domains

edilnord.example

Account manager

Giulia Ferri

Installed products

Gestionale ERP version 11.8

Installed at the customer's premises, site Sede

Paghe Web version 2026.2

In the cloud (SaaS), site Sede

Rilevazione presenze version 5.4

Installed at the customer's premises, site Base logistica di Agrate

Contacts and sites

Contacts

Giorgio Brivio

Ufficio del personale

giorgio.brivio@edilnord.example

Help with this page

Customer page

Orafilea · Customer documentation

15 / 77

Orafila

Demo Software Srl

Dashboard

Tickets 3

Inbox 1

Customers 3

Calendar

Sales

Customer orders 1

Invoices and receipts 1

Purchasing and stock

Suppliers

Supplier orders 1

Products and stock 1

Order tracking

Administration

Income and expenses 1

Accounting

Employees and absences 1

Reports

Customers

Health, hour banks, renewals and recurring value of every customer.

Import from CSV

New customer

Search for a customer by name, code, VAT number or e-mail domain

Search

12 customers.

Customer	Health	Open tickets	Hour bank	Cancellation deadline	Annual value
Autoricambi Brianza Srl Code C0111	Healthy Score 80 out of 100	0	—	25 May 2027 in 210 days	€6,108.00
Caseificio Valtellina Soc. Coop. Code C0109	Healthy Score 100 out of 100	0	Expired	5 Apr 2027 in 160 days	€4,352.56
Cooperativa Agricola Valle Verde Code C0104	At risk Score 60 out of 100	2	—	—	€3,708.81
Dolomiti Trasporti Srl Code C0106	Healthy Score 100 out of 100	2	—	27 May 2028 in 578 days	€1,800.00
Edilnord Costruzioni Spa Code C0108	Needs attention Score 62 out of 100	0	—	27 Jun 2027 in 243 days	€14,688.00
Hotel Lago Maggiore Srl Code C0107	Healthy Score 100 out of 100	0	Used up	15 May 2027 in 200 days	€2,472.54
Logistica Adriatica Spa Code C0102	Healthy Score 90 out of 100	2	Running low	17 Nov 2026 in 21 days	€7,329.60
Officine Lario Srl Code C0101	Healthy Score 100 out of 100	2	Available	26 Mar 2027 in 150 days	€4,886.40
Panificio Fratelli Rota Snc Code C0110	Healthy Score 100 out of 100	0	—	—	

Help with this page

3

Customer list

Customer record

- Company name, customer code, VAT number (with check digit validation), codice fiscale (tax code), PEC, **SDI recipient code** (SDI: Sistema di Interscambio, the Italian e-invoicing exchange), e-mail domains, account manager, parent company.
- Contacts** with e-mail, phone, job title and “Contact person for” (e-mails from a contact open tickets on the customer's behalf); **sites** with address.
- Installed products** with version, installation type (at the customer's premises, in the cloud...) and site.

360° view

- Customer health:** a score from 0 to 100 with the risks and their weight in points (missed service times, rising tickets, overdue invoices, no recent contact, cancellation deadline close...) and the opportunities (hour bank top-up, renewal meeting). Levels: **Healthy** (75 and above), **Needs attention** (50 to 74), **At risk** (below 50, or cancellation received).
- AI briefing:** a summary of the situation and up to 4 recommended actions, each with the department responsible; it is a suggestion and is not saved.
- Contracts, hour banks, ticket allowance, latest tickets, products, contacts.
- The customer's **orders and invoices:** latest orders and invoices with their status, amount invoiced this year, to collect and overdue; new order or new invoice with the customer already chosen.

Importing from Excel or CSV

- Statuses: Available, Running low, Used up (with the overrun), Expired; **forecast of the date it runs out** based on recent usage.

Ticket allowance

- Per year: credits = annual support fee divided by the value of one credit, rounded up, plus the extra credits purchased.
- Warning threshold and rules: unlimited tickets for the plans that include them, charging for tickets beyond the credits.

8. Calendar

Orafila
Demo Software Srl

Dashboard

Tickets 3

Inbox 1

Customers 3

Calendar

Sales

Customer orders 1

Invoices and receipts 1

Purchasing and stock

Suppliers

Supplier orders 1

Products and stock 1

Order tracking

Administration

Income and expenses 1

Accounting

Employees and absences 1

Reports

Calendar

Events for the whole company and for each group, plus holiday and time off. An event can take you straight to the ticket, invoice or customer it is about.

Groups

October 2026 Today

New event Holiday or time off Month List

Calendars to show

☒ Whole company ☐ Amministrazione ☒ Commerciali (your group) ☐ Tecnici ☒ Holiday and time off Show

Right-click a day (or click its number) to see what you can add: events, holiday and time off, jobs on a ticket, invoice due dates, appointments with a customer. Right-click an event to open the linked activity or edit it.

Mon	Tue	Wed	Thu	Fri	Sat	Sun
28	29	30 Time off 2 h - Luca More...	1	2 Time off 2 h - Davide Ru...	3	4
5	6	7 Time off 3 h - Marco Gal...	8	9	10	11
12 Sick leave - Luca Moretti...	13 Sick leave - Luca Moretti...	14 Sick leave - Luca Moretti...	15	16	17	18
19 Sick leave - Elena Rinald... Time off 3 h - Sara Conti...	20 Sick leave - Elena Rinald...	21	22 Time off 4 h - Elena Rin...	23	24	25
26	27 Holiday - Paolo Neri	28 Holiday - Paolo Neri	29 Holiday - Paolo Neri	30 15:00 Visita per il rinn...	31	

Help with this page

Calendar

- A calendar for the **whole company** and one for each **group** (for example Technicians, Sales), each with its own colour; everyone chooses which to show.
- People's **holiday and time off** appear on the calendar: people who can see employees and absences see the type; the others see only "Away" for colleagues, without the reason.
- All-day, timed or multi-day events, which can be linked to a **ticket**, an **invoice** or a **customer**, with a direct link to their page (only for people who can see that module).
- **Right-click** on a day (or click its number, also from the keyboard and on a phone): new event, holiday, time off, job on a ticket, invoice due date, appointment with a customer, new ticket or new invoice for that day.
- Everyone sees every group's calendar; each person writes in the company calendar and in their own groups' calendars; administrators write in all of them and create the groups.
- **List** view, handy on a phone.

9. Customer orders

Orafilea
Demo Software Srl

Dashboard

Tickets 3

Inbox 1

Customers 3

Calendar

Sales

Customer orders 1

Invoices and receipts 1

Purchasing and stock

Suppliers

Supplier orders 1

Products and stock 1

Order tracking

Administration

Income and expenses 1

Accounting

Employees and absences 1

Reports

Customer orders

From draft to delivery: confirmation, shipment with tracking, invoice.

Search number (ODV-12), customer reference, customer or tracking

StatusAll

CustomerAll

DeliveryAll

Filter

47 orders, most recent first.

Order	Customer	Date	Expected delivery	Status	Total	Invoice
ODV-47	Dolomiti Trasporti Srl	27 Oct 2026	—	Draft	€434.32	No
ODV-46	Tessiture Biellesi Srl	26 Oct 2026	6 Nov 2026	Confirmed	€750.30	No
ODV-45	Logistica Adriatica Spa	19 Oct 2026	28 Oct 2026	Shipped	€1,141.31	No
ODV-44 Ref. Ordine 77	Cooperativa Agricola Valle Verde	12 Oct 2026	25 Oct 2026 2 days late	Confirmed Late	€1,061.40	No
ODV-43	Studio Ferraris e Associati	7 Oct 2026	17 Oct 2026	Cancelled	€317.20	No
ODV-42 Ref. OA 2026/118	Officine Lario Srl	22 Sept 2026	2 Oct 2026	Delivered	€3,403.80	197/2026
ODV-41 Ref. OA 2026/491	Tessiture Biellesi Srl	25 Aug 2026	3 Sept 2026	Delivered	€1,624.31	170/2026
ODV-40	Hotel Lago Maggiore Srl	30 Jul 2026	10 Aug 2026	Delivered	€1,437.16	158/2026
ODV-39	Edilnord Costruzioni Spa	30 Jul 2026	10 Aug 2026	Delivered	€1,862.76	157/2026
ODV-38 Ref. OA 2026/336	Tessiture Biellesi Srl	30 Jul 2026	10 Aug 2026	Delivered	€1,001.62	156/2026
ODV-37 Ref. OA 2026/217	Edilnord Costruzioni Spa	13 Jul 2026	22 Jul 2026	Delivered		

Help with this page 1

Customer orders

- Numbering **ODV-1, ODV-2...**; statuses Draft, Confirmed, Shipped, Delivered, Cancelled.
- Lines with a product (which suggests description, price and VAT) or free lines; quantity, price, discount, VAT; totals updated as you type; stock availability for each line.
- **Confirmation**, optionally sending the PDF to the customer by e-mail; once confirmed, the order can no longer be changed.
- **Shipment** with date, carrier, tracking code and link: it takes the goods out of stock (it is not recorded if there is not enough stock) and can notify the customer by e-mail.
- **Delivery, cancellation** with a reason (not after shipment), **history** of every step.
- **“Create invoice”**: the invoice starts with the order's customer and lines; an order is invoiced only once.

Orafila

Demo Software Srl

Dashboard

Tickets3

Inbox1

Customers3

Calendar

Sales

Customer orders1

Invoices and receipts1

Purchasing and stock

Suppliers

Supplier orders1

Products and stock1

Order tracking

Administration

Income and expenses1

Accounting

Employees and absences1

Reports

Order ODV-45

Logistica Adriatica Spa · of 19 Oct 2026 · Shipped

Download PDF

Create invoice

Summary

Customer

Logistica Adriatica Spa

Order date

19 Oct 2026

Expected delivery

28 Oct 2026

Ship to

Logistica Adriatica Spa, Via Flaminia 120, 60015 Falconara Marittima (AN)

Shipped on

25 Oct 2026 with GLS

Tracking

GLS7788990011

Invoice

Not yet invoiced

Delivery

When the customer has received the goods, mark the order as delivered.

Delivered on

10/27/2026

Mark as delivered

Lines

Description	Quantity	Unit price	Discount	VAT	Net amount
Lettore badge RFID Code HW-BADGE	6 pz	€89.00	—	22%	€534.00
Badge RFID (confezione da 50) Code HW-TESSERE	3 conf	€45.00	10%	22%	€121.50
Installazione e configurazione dei lettori Code SRV-INST	4 h	€70.00	—	22%	€280.00
Net amount					€935.50
VAT 22% on €935.50					€205.81
Total					€1,141.31

History

19 Oct, 11:00

Draft · Ordine creato · Elena Rinaldi

20 Oct, 12:00

Confirmed · Ordine confermato al cliente · Elena Rinaldi

Help with this page1

A shipped order, with tracking

Orafila · Customer documentation

20 / 77

10. Invoices and receipts

Orafilea
Demo Software Srl

Dashboard
Tickets 3
Inbox 1
Customers 3
Calendar
Sales
Customer orders 1
Invoices and receipts 1
Purchasing and stock
Suppliers
Supplier orders 1
Products and stock 1
Order tracking
Administration
Income and expenses 1
Accounting
Employees and absences 1
Reports

Invoices and receipts

Customer invoices, payments and receipts. The PDF is the courtesy copy; the electronic invoice is sent through SdI, the Italian e-invoicing exchange system.

€385,688.78

Issued in 2026 (204 invoices)

€43,474.14

To collect

€5,925.74

Overdue (4 invoices)

Year
2026
Status
All
Customer name or code
Show

Showing the 200 most recent invoices: use the filters to find the others..

Number	Date	Customer	Total	Received	Due date	Status
Draft	18 Oct 2026	Cooperativa Agricola Valle Verde	€1,134.60	—	17 Nov 2026	Draft
204/2026	26 Oct 2026	Edilnord Costruzioni Spa	€1,493.28	€0.00	25 Dec 2026 due in 59 days	Unpaid
203/2026	26 Oct 2026	Officine Lario Srl	€496.78	€0.00	25 Nov 2026 due in 29 days	Unpaid
202/2026	26 Oct 2026	Cooperativa Agricola Valle Verde	€377.07	€0.00	25 Nov 2026 due in 29 days	Unpaid
201/2026	13 Oct 2026	Tessiture Biellesi Srl	€1,035.74	€0.00	12 Nov 2026 due in 16 days	Unpaid
200/2026	7 Oct 2026	Logistica Adriatica Spa	€585.60	€200.00	6 Nov 2026 due in 10 days	Partly paid
199/2026	1 Oct 2026	Hotel Lago Maggiore Srl	€3,051.22	€0.00	31 Oct 2026 due in 4 days	Unpaid
198/2026	1 Oct 2026	Autoricambi Brianza Srl	€10,294.36	€0.00	30 Nov 2026	Unpaid

Invoices and receipts

- Invoices from scratch or from an order; billing details taken from the customer's record (company name, VAT number, tax code, address, PEC, SDI recipient code) and editable for the individual invoice.
- **Issue:** the invoice gets the next number of its year (for example 12/2026), **with no gaps**, and from then on it can no longer be changed. The date cannot be in the future or earlier than the last invoice issued in the same year. The customer's billing details stay **fixed at issue**.
- **VAT by rate**, calculated on the total of each rate, with commercial rounding; amounts handled to the cent with no floating-point errors.
- **Payments**, partial or in full, with the **numbered receipt** (R-1/2026...), the amount also in words, and the entry in Income and expenses. A wrong payment is voided with the reason: the receipt stays on record as voided and the numbering has no gaps.
- **Printing, PDF** and **sending by e-mail** of the invoice, the receipt and the **payment reminder** for overdue invoices; for each e-mail you see when it went out or why it did not.
- **Cancellation** of an invoice with no payments, with the reason; the number stays used.
- Payment methods: bank transfer, cash, card, direct debit (SDD), other. With bank transfer the invoice shows the IBAN and the payment reference.
- The PDF is the **courtesy copy**: the invoice that counts for tax purposes is the electronic one sent to the SDI (Sistema di Interscambio).

11. E-invoicing with Fatture in Cloud

Orafila
Demo Software Srl

Dashboard
Tickets
Inbox
Customers
Calendar
Sales
Customer orders
Invoices and receipts
Purchasing and stock
Suppliers
Supplier orders
Products and stock
Order tracking
Administration
Income and expenses
Accounting
Employees and absences
Reports

Company Document details Users Roles Queues and mail Notifications **Fatture in Cloud** Artificial intelligence Products

[Activity log](#)

Fatture in Cloud

Connect your Fatture in Cloud account: each invoice issued in Orafila becomes an e-invoice there with the same number, and from there it is sent to the SDI (Sistema di Interscambio, the Italian e-invoicing exchange).

Connection

Access token you copy it from Fatture in Cloud when you connect the application

Orafila tries it with Fatture in Cloud straight away and keeps it encrypted: nobody can read it from here again.

[Connect Fatture in Cloud](#)

How to get the token

1. In the Fatture in Cloud developer area create an application with manual authentication (manual token) and copy its Client ID.
2. In Fatture in Cloud open Impostazioni > Applicazioni collegate (Settings > Connected applications) and press "Collega una nuova applicazione" (Connect a new application), then paste the Client ID.
3. Choose the company and give read and write access to invoices and read access to settings.
4. Copy the access token shown and paste it here.

The token does not expire: if you revoke it in Fatture in Cloud, paste a new one here.

How it works

- From the page of an issued invoice press "Create in Fatture in Cloud": the e-invoice takes the same number, with the customer's SDI recipient code and PEC.
- Before creating it Orafila checks that Fatture in Cloud works out the same totals as the courtesy copy.
- Then press "Send to the SDI in Orafila" or "Send to the SDI in Fatture in Cloud" to check whether it was delivered successfully.
- Do not create invoices by hand in Fatture in Cloud.

Fatture in Cloud settings

- Connection with a Fatture in Cloud **token**, stored encrypted and never shown again.
- Each issued invoice is created in Fatture in Cloud as an e-invoice with **the same number**, the same customer details and the same lines, also **automatically on issue**. Before creating it, Orafila checks that Fatture in Cloud works out **the same totals**.
- **Sending to the SDI** from Orafila, with the XML file checked; **status** updated (delivered, in the cassetto fiscale, i.e. the online tax area, or discarded with the reason) and **sending again** after correction.
- Options: company in Fatture in Cloud, numbering with a **sezionale** (numbering series, for example /PSA), **natura** (VAT exemption code) for lines with 0% VAT (for example N2.2), code for the "Other" payment.
- Without a recipient code the invoice goes out with 00000000: the SDI delivers it to the channel the customer has registered or to their cassetto fiscale.

12. Suppliers and supplier orders

Orafilea
Demo Software Srl

Dashboard

Tickets 3

Inbox 1

Customers 3

Calendar

Sales

Customer orders 1

Invoices and receipts 1

Purchasing and stock

Suppliers

Supplier orders 1

Products and stock 1

Order tracking

Administration

Income and expenses 1

Accounting

Employees and absences 1

Reports

Supplier orders

Prepare orders, send them to suppliers as PDFs and record deliveries: the quantities go into stock automatically.

Suppliers

New order

2

1

1

€14,347.20

Awaiting delivery

Late

Drafts to send

Ordered in 2026, including VAT

Search number, supplier or their reference

Status

Supplier

Delay

Filter

Open (drafts and awaiting delivery)

All

All orders

3 orders.

Order	Supplier	Status	Expected delivery	Total
ODA-18 of 27 Oct 2026	TechDistribuzione Srl	Draft	10 Nov 2026	€634.40
ODA-17 of 25 Oct 2026	TechDistribuzione Srl	Sent	3 Nov 2026	€1,171.20
ODA-16 of 15 Oct 2026	Carta & Consumabili Spa	Partly received	24 Oct 2026 3 days late	€951.60

Help with this page 1

Supplier orders

Suppliers

- Company name, code (unique), VAT number and IBAN with validation (warnings that do not block), e-mail for orders, address, payment terms in days.
- The supplier page shows open orders, the amount ordered this year, the products it is the usual supplier of, and recorded expenses.
- Deactivation instead of deletion for suppliers already in use.

Supplier orders

- Numbering **ODA-1, ODA-2...**; statuses Draft, Sent, Partly received, Received, Cancelled.
- The **PDF is sent by e-mail** to the supplier; once sent, lines and prices do not change.
- **Goods received**, even in several deliveries: lines with products tracked in stock add to the stock on hand at the line's purchase price; you cannot record more items than were ordered.
- Cancellation with a reason as long as nothing has arrived.
- **Supplier invoice** recorded in Income and expenses, linked to the order, with the due date based on the supplier's terms.
- Orders **late** against the expected delivery, with a dedicated filter.

13. Products and stock

Orafilea
Demo Software Srl

Dashboard

Tickets 3

Inbox 1

Customers 3

Calendar

Sales

Customer orders 1

Invoices and receipts 1

Purchasing and stock

Suppliers

Supplier orders 1

Products and stock 1

Order tracking

Administration

Income and expenses 1

Accounting

Employees and absences 1

Reports

Products and stock

Products and services with code, prices and VAT, and the stock on hand of goods tracked in stock.

New product

6

2

1

€6,366.00

Products tracked in stock

Below reorder level

Out of stock

Stock value at cost

Show products below reorder level or out of stock

Search by name or code

Type

Stock

Status

Show

15 products.

Product	Type	Sale price	Cost	VAT	Stock on hand	Stock
Alimentatore per lettore badge Code HW-ALIM	Goods	€25.00	€12.00	22%	0 pz	Out of stock
Badge RFID (confezione da 50) Code HW-TESSERE	Goods	€45.00	€24.00	22%	3 conf	Below reorder level
Conservazione digitale Code SW-CONS	Software	€360.00	—	22%	Not tracked	
Contabilità Studio Code SW-CONTAB	Software	€950.00	—	22%	Not tracked	
Gestionale ERP Code SW-ERP	Software	€2,400.00	—	22%	Not tracked	
Giornata di consulenza applicativa Code SRV-CONS	Service	€620.00	—	22%	Not tracked	
Giornata di formazione Code SRV-FORM	Service	€480.00	—	22%	Not tracked	

Help with this page 1

Products and stock

- Products of type **Goods**, **Service** or **Software**, with code, unit of measure, sale price, purchase cost, VAT rate and usual supplier; suggested in the lines of orders and invoices.
- **Goods tracked in stock** have their stock on hand calculated from the movements: opening stock, deliveries from suppliers, shipments to customers, adjustments (with a required reason), returns. Two shipments at the same moment cannot use the same goods.
- **Reorder level**: the product shows as “Below reorder level” and whoever manages the stock receives an e-mail.
- **Stock value** at purchase cost; products out of stock and to reorder at a glance.
- Deactivation for products with a history; deletion only for those never used.

14. Order tracking

Orafile
Demo Software Srl

Dashboard

Tickets 3

Inbox 1

Customers 3

Calendar

Sales

Customer orders 1

Invoices and receipts 1

Purchasing and stock

Suppliers

Supplier orders 1

Products and stock 1

Order tracking

Administration

Income and expenses 1

Accounting

Employees and absences 1

Reports

Order tracking

Customer orders to ship or in transit and supplier orders waiting to arrive, late ones first.

2
Late

2
To ship

1
In transit to customers

2
Expected from suppliers

Search number (ODV-12, ODA-3), tracking code, reference or name

Orders

Expected date

All

All

Filter

5 open orders

Order	Customer or supplier	Status	Expected date	Last update	Shipment
ODA-16 Supplier order	Carta & Consumabili Spa	Partly received	24 Oct 2026 3 days late	22 Oct, 17:00 Partly received: Arrivata una parte della merce	—
ODV-44 Customer order - ref. Ordine 77	Cooperativa Agricola Valle Verde	Confirmed	25 Oct 2026 2 days late	13 Oct, 12:00 Confirmed: Ordine confermato al cliente	To ship
ODV-45 Customer order	Logistica Adriatica Spa	Shipped	28 Oct 2026	25 Oct, 15:00 Shipped: Spedito con GLS, codice GLS7788990011	GLS GLS7788990011
ODA-17 Supplier order	TechDistribuzione Srl	Sent	3 Nov 2026	25 Oct, 11:00 Sent: Ordine inviato al fornitore	—
ODV-46 Customer order	Tessiture Biellesi Srl	Confirmed	6 Nov 2026	27 Oct, 11:00 Confirmed: Ordine confermato al cliente	To ship

Help with this page 2

Order tracking

- A single view of **open orders**: customer orders (confirmed or shipped) and supplier orders (sent or partly received).
- At the top, the figures Late, To ship, In transit to customers, Expected from suppliers; in the list, **late orders** first, oldest first, with the last update and the **link to the carrier**.
- Search by number, tracking code, reference or name.

15. Income and expenses

Orafila

Demo Software Srl

Dashboard

Tickets 3

Inbox 1

Customers 3

Calendar

Sales

Customer orders 1

Invoices and receipts 1

Purchasing and stock

Suppliers

Supplier orders 1

Products and stock 1

Order tracking

Administration

Income and expenses 1

Accounting

Employees and absences 1

Reports

Income and expenses

The company's cash book: purchases, bills, supplier invoices and payments received, with what is still to pay or to collect.

AccountsExport to CSVNew entry

Summary for October 2026

€58,178.66

Income

€30,805.58

Expenses

€27,373.08

Balance for the period

€20,348.60

Total to pay (6 expenses)

€732.00

Overdue and unsettled (1 entry)

YearMonthTypeStatusCategory

2026OctoberIncome and expensesAllAll

Search description, document, customer or supplier

Show

33 entries in October 2026.

Date	Description	Customer or supplier	Total	Due date	Status
27 Oct 2026	Expense Stipendi e contributi Stipendi di ottobre 2026	—	–€14,700.00	—	To pay Mark as paid
26 Oct 2026	Income Incassi da clienti Payment for invoice 161/2026 Document 161/2026	Logistica Adriatica Spa	€2,235.53	—	Collected on 26 Oct 2026, Banca Esempio - conto corrente
26 Oct 2026	Income Incassi da clienti Payment for invoice 174/2026 Document 174/2026	Officine Lario Srl	€496.78	—	Collected on 26 Oct 2026, Banca Esempio - conto corrente
24 Oct 2026	Expense Consulenze Pratiche per l'assunzione di un nuovo dipendente Document N-51	Studio Commercialista Neri	–€549.00 of which VAT €99.00	23 Nov 2026	To pay Mark as paid

Help with this page 1

Income and expenses

- **Cash book:** expenses, bills, supplier invoices and income that does not come from an Orafila invoice. Payments of issued invoices appear automatically.
- Total amount including VAT with the exact **breakdown** of net amount and VAT by rate (or VAT entered by hand if the document shows a different amount), category, supplier or customer, document number, due date.
- **To pay / Overdue**, “Mark as paid” with date and account.
- **Accounts** (bank account, cash, card, other) with opening balance and **balance today**.
- **CSV export** of the period, ready for Excel and for your accountant.

16. Accounting

Orafile

Demo Software Srl

Dashboard

Tickets

Inbox

Customers

Calendar

Sales

Customer orders

Invoices and receipts

Purchasing and stock

Suppliers

Supplier orders

Products and stock

Order tracking

Administration

Income and expenses

Accounting

Employees and absences

Reports

Accounting

The company's financial picture: result, VAT, account balances, amounts owed by customers and owed to suppliers. It helps you keep things under control; it does not replace your accountant's books.

Year

2026

Period

Whole year

Show

Income and expenses

Simplified profit and loss, year 2026

€316,138.34

€370.00

€284,659.50

€31,848.84

Revenue from issued invoices

Other income

Costs

Profit, net of VAT

Amounts without VAT. Revenue is the invoices issued in the period (not drafts or cancelled ones); other income and costs are the entries in Income and expenses by document date. Invoice payments are not counted twice.

Revenue and other income

Costs

Month	Revenue	Other income	Costs	Result
January	€49,267.12	€180.00	€33,371.50	€16,075.62
February	€34,357.32	€0.00	€24,318.00	€10,039.32
March	€22,896.82	€21.00	€25,991.00	-€3,073.18
April	€31,257.82	€0.00	€29,639.50	€1,618.32
May	€29,186.94	€0.00	€25,139.50	€4,047.44
June	€30,130.09	€24.00	€33,789.50	-€3,635.41
July	€46,743.37	€0.00	€28,987.50	€17,755.87
August	€24,241.98	€0.00	€25,482.50	-€1,240.52

Help with this page

- **Simplified profit and loss** by year or quarter, month by month: revenue from issued invoices, other income, costs, result, all excluding VAT.
- **VAT summary** by quarter: output VAT, input VAT and balance. It is **indicative** for the standard VAT scheme: it does not take into account split payment, reverse charge, pro rata, advance payments or credits from previous years.
- **Account balances, amounts owed by customers** and **amounts owed to suppliers** by age of the due date.
- It is a read-only page: it does not replace your accountant's books.

17. Employees and absences

Orafila

Demo Software Srl

Dashboard

Tickets 3

Inbox 1

Customers 3

Calendar

Sales

Customer orders 1

Invoices and receipts 1

Purchasing and stock

Suppliers

Supplier orders 1

Products and stock 1

Order tracking

Administration

Income and expenses 1

Accounting

Employees and absences 1

Reports

Employees and absences

The company's people, the holiday they have left and who is away today. Absence requests arrive here for approval.

New employee

8

1

1

Current employees

Away today

Requests to approve

Requests to approve

Luca Moretti: holiday from 16 Nov 2026 to 20 Nov 2026

5 working days. Holiday left: 5 days (5 awaiting approval).

Approve

Reject

Add a note

Search by name, e-mail, job title or department

Department

Status

All departments

Current employees

Search

8 people. Holiday left in 2026, after approved and requested days.

Employee	Department	Contract	Hire date	Holiday left	User
Chiara Villa Impiegata amministrativa	Amministrazione	Permanent	26 Nov 2024	9 of 20	Chiara Villa
Davide Russo Sistemista junior	Assistenza	Apprenticeship	31 Mar 2026	9 of 20	Not linked
Elena Rinaldi Commerciale	Vendite	Permanent	17 Jul 2023	9 of 20	Elena Rinaldi
Giulia Ferri Responsabile assistenza	Assistenza	Permanent	1 Apr 2020	9 of 20	Giulia Ferri
Luca Moretti Formatore	Assistenza	Fixed-term	22 Sept 2025	5 of 20	Luca Moretti
Marco Galli Tecnico applicativo	Assistenza	Permanent	19 Sept 2022	4 of 20	

Help with this page

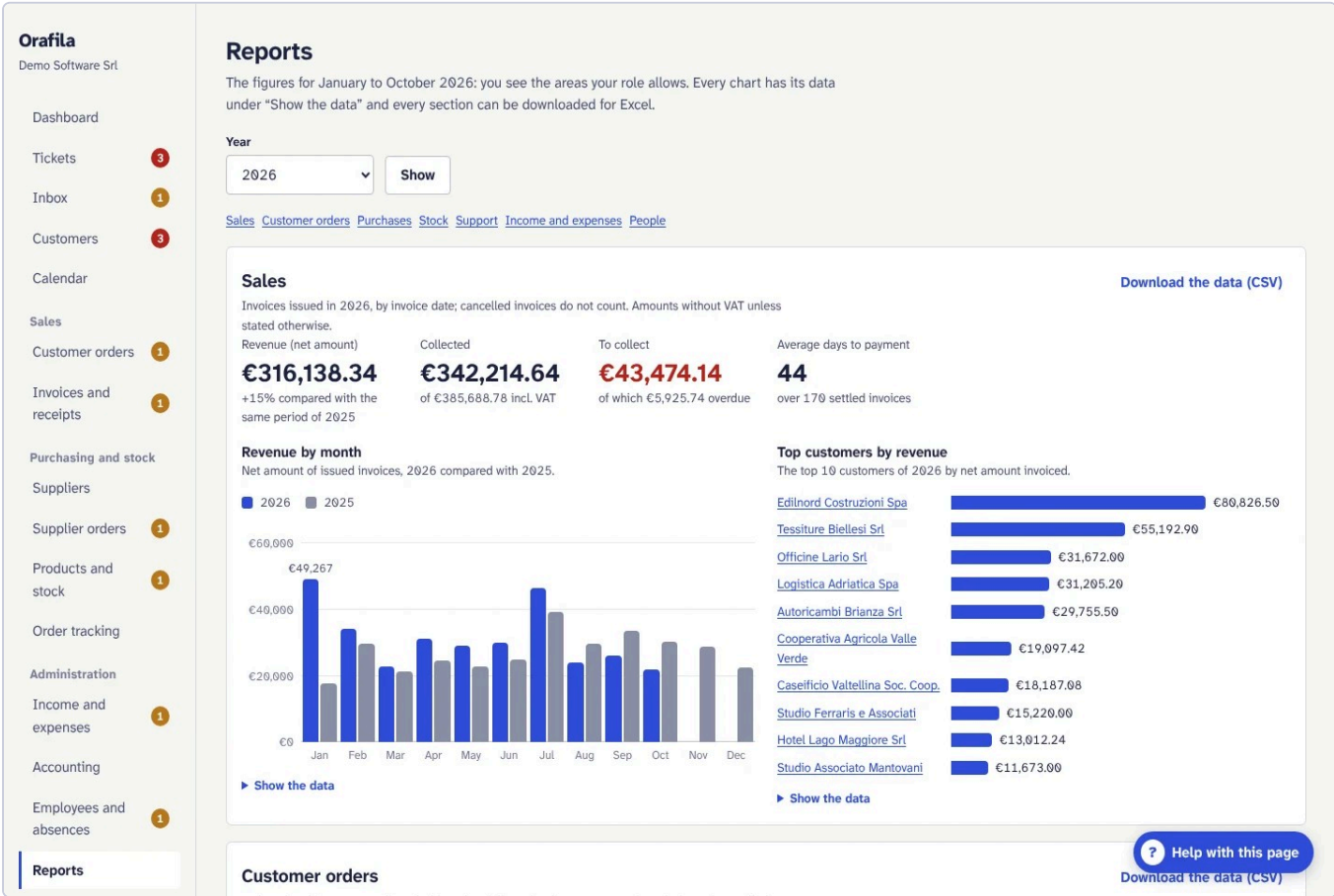
Employees and absences

- **Employee record:** job title, department, contract type, weekly hours, hire date and end of employment, holiday days per year (20 unless changed), hourly cost (visible only to people who manage employees), linked Orafila user.
- **Absences:** holiday, time off by the hour, sick leave (dates only, never diagnoses or certificates), training, other. Overlaps are refused (two periods of time off by the hour on the same day are allowed).
- **Holiday balance** in working days of the company calendar (excluding weekends, holidays and closures): allowance, taken or approved, pending, left.
- **Requests** from “My absences” or from the calendar, with **approval** or rejection and a note, notified by e-mail. Requests from people who manage staff are decided by someone else.

Orafila · Customer documentation

29 / 77

18. Reports



19. Assistant and help on every page

The screenshot displays the Orafila software interface. On the left is a sidebar with a menu including Dashboard, Tickets (3), Inbox (1), Customers (3), Calendar, Sales, Customer orders (1), Invoices and receipts (1), Purchasing and stock, Suppliers, Supplier orders (1), Products and stock (1), Order tracking, Administration, Income and expenses (1), Accounting, Employees and absences (1), and Reports. The main content area is titled 'Fatturazione molto lenta dopo l'aggiornamento' (TCK-197, In progress, High, Tessiture Biellesi Srl) with a 'Back to the list' link. It features a 'Resolution' section showing 'Over by 4 h working time' with a progress bar (Target 16 h, 20 h used) and a 'Conversation' section with messages from Roberto Sella (Customer) and Sara Conti (Agent). To the right of the conversation are sections for 'Customer' (Name, Contact, Products), 'Details' (Queue, Category, Product, Opened on), and 'Coverage' (Pacchetto 60 ore, Available). On the far right is an 'Assistant - help with this page' sidebar with a 'Close' button. It contains a 'Tickets' section, a 'What it is for' section, a 'To check here' section with a 'Check again' link, and three 'Problem' sections: '2 tickets have exceeded the service times', '2 tickets are close to the service-time limit', and '3 tickets are not assigned to anyone'. Each problem section includes a 'What to do' instruction and a link to 'Open the tickets'.

Help with this page

- **“Help with this page”**: on every page it opens the assistant beside your work, with *What it is for* (the section), *To check here* (what the automatic checks found, with what to do and the link), *Ask the assistant* (suggested questions, one click away) and the *How to / Common problems* guide.
- **Assistant page**: you ask how to do something or why something is not working; the assistant looks at the modules the person's role can see and suggests the steps with the link to the page where to take them. **It changes nothing.**
- **Health check**, also without AI: mailboxes that do not read or do not send, mail worker stopped, e-mails to sort, tickets past their time limit or without an assignee, customers to follow up, users locked out or with an expired invitation, stock, late orders, overdue invoices, expenses to pay, absence requests, notifications not going out, AI not set up or with the budget used up.
- Without AI, questions search the guides. Details in [Artificial intelligence](#).

Orafilea

Demo Software Srl

Dashboard

Tickets 3

Inbox 1

Customers 3

Calendar

Sales

Customer orders 1

Invoices and receipts 1

Purchasing and stock

Suppliers

Supplier orders 1

Products and stock 1

Order tracking

Administration

Income and expenses 1

Accounting

Employees and absences 1

Reports

Assistant

Ask how to use Orafilea or why something is not working. The assistant consults the modules your role can see and suggests what to do, without changing anything.

Ask the assistant

The chosen AI agent (Claude Opus 5.5) has no API key on the server: until it is set, questions search the guides. The health check works all the same. [Choose another agent](#)

Your question how to do something, or what is not working

For example: why did the e-mail from mario@cliente.it not become a ticket?

Search the guides It changes nothing: it suggests what to do and where.

Questions you can ask:

Is anything wrong today?

Where do I start today?

How do I record a request that came in by phone?

Which tickets are past their service times, and why?

How do I put a ticket on hold while waiting for the customer?

Guides

How to use each module, step by step, and the most common problems with their solution.

Dashboard

Tickets

Inbox

Health check

Automatic checks of the modules you can see, run just now. No AI needed. [Check again](#)

2 to fix, 17 to check or improve.

Problem Tickets

2 tickets have exceeded the service times

Times are counted in working hours, according to the company's calendar and targets.

What to do: Open the ticket list: they are at the top, sorted by urgency. Reply or update the status; if you are waiting for the customer, set the ticket to "Waiting for customer", which stops the resolution time.

[Open the tickets](#)

Problem Customers

Cooperativa Agricola Valle Verde: to follow up

Contract AS-2024-077 cancelled: win the customer back by 25 May 2027.

What to do: Open the customer page: there you find contracts, hour banks and the ticket allowance, and you can prepare the briefing with AI.

[Open the page of Cooperativa Agricola Valle Verde](#)

To check Tickets

2 tickets are close to the service-time limit

Assistant page

20. Settings

Reserved for people who manage settings and users (administrators).

Page	What is set
Company	Name, hourly rate (default €60 an hour), rounding and minimum charge for time, billable travel, service times by priority, ticket categories, days to reopen a closed ticket, company closures, AI on or off
Document details	Company name, VAT number, tax code, registered address, contact details, PEC, IBAN and bank, suggested payment days, invoice footer notes, document language ; letterhead preview
Users	Invitations, roles, skills (the ticket categories each person handles, used by AI triage), language, unlocking, resetting two-step verification or access, suspension and reactivation. The company always keeps at least one active administrator and nobody can suspend themselves
Roles	Seven default roles and custom roles with 23 permissions grouped by area
Queues and mail	Support queues with ticket prefix and acknowledgement of receipt; IMAP/SMTP mailbox of each queue with "Test the connection"; e-mails not sent
Notifications	Mailbox that alerts and documents are sent from; reorder level and absence alerts; test e-mail; recently sent
Fatture in Cloud	Token, company, numbering series (sezionale), exemption code (natura) for 0% VAT, "Other" payment, automatic creation on issue
Artificial intelligence	Main agent and agent per feature, monthly budget, stop when the budget is used up, credit with each provider, spend by agent and feature
Products	Catalogue of the products installed at customers' premises and named on tickets
Activity log	Who did what and when, with filters; cannot be changed

Orafilea · Customer documentation

32 / 77

Orafila

Demo Software Srl

Dashboard

Tickets3

Inbox1

Customers3

Calendar

Sales

Customer orders1

Invoices and receipts1

Purchasing and stock

Suppliers

Supplier orders1

Products and stock1

Order tracking

Administration

Income and expenses1

Accounting

Employees and absences1

Reports

Company

Document details

Users

Roles

Queues and mail

Notifications

Fatture in Cloud

Artificial intelligence1

Products

Activity log

Company

Name, rate, time charging rules, service times and calendar. Values not set yet show the Orafila defaults.

Company

Company name shown at the top left

Demo Software Srl

Company code for signing in: **demo**. It cannot be changed here, because it is what everyone types to sign in.

Rate and time charging

They are used for ticket revenue and margins and for the minutes deducted from hour banks when you log time. A change updates the revenue and margins of every ticket at once, including closed ones; time already deducted from hour banks does not change.

Hourly rate in euros, for one hour of support

65.00

Round up to every minutes; 1 to charge by the minute

15

Minimum charge per job minutes; 0 if there is no minimum

30

☐ Also charge travel time Travel logged with the job is added to the time worked.

Service times (SLA)

In working hours, counted on the company calendar: nights, weekends and holidays do not count. You can use decimals, for example 0.5 for half an hour. A change applies at once to every ticket, including those

Help with this page1

Company settings

Activity log

Orafila

Demo Software Srl

Dashboard

Tickets3

Inbox1

Customers3

Calendar

Sales

Customer orders1

Invoices and receipts1

Purchasing and stock

Suppliers

Supplier orders1

Products and stock1

Order tracking

Administration

Income and expenses1

Accounting

Employees and absences1

Reports

Company

Document details

Users

Roles

Queues and mail

Notifications

Fatture in Cloud

Artificial intelligence1

Products

Activity log

Activity log

Who did what and when: sign-ins, users and roles, customers, tickets, documents and settings. The log cannot be changed or deleted.

Area

All

Who

Everyone

From

mm/dd/yyyy

To

mm/dd/yyyy

Text in the action or the details

Filter

The most recent activity, 3 per page at most. Times are Italian time.

When	Who	What	Details
27 Oct, 11:19	Giulia Ferri (you)	Two-step verification turned on Giulia Ferri	—
27 Oct, 11:19	Giulia Ferri (you)	Interface language changed Giulia Ferri	Language English
27 Oct, 11:19	Giulia Ferri (you)	Sign-in Giulia Ferri	With two-step verification no

There is no older activity with these filters.

Help with this page

Activity log

Orafila · Customer documentation

33 / 77

It records successful and failed sign-ins, password changes, users and roles, customers and contracts, tickets, products and stock, documents and settings, with date and time, author, action, details and a link to the record. It cannot be changed or deleted and never contains passwords, codes or other secrets.

21. E-mail notifications and PDF documents

- Invoices, payment reminders, receipts, order confirmations, shipping notices, supplier orders, reorder level alerts and decisions on absences are sent from the **mailbox of the queue** chosen in Settings › Notifications, with new attempts in case of errors and the headers that prevent automatic replies.
- Customers' replies to these e-mails arrive in the queue's mailbox and become tickets like the others.
- The **PDFs** (invoices, receipts, customer orders and supplier orders) are generated by the application, without external services, with the letterhead taken from Document details.
- Notifications to staff arrive in each person's language; documents and e-mails to customers and suppliers in the company's document language.

22. Languages

- **Italian and English** (British) throughout the application: pages, messages, guides, the assistant's answers, e-mails and PDFs.
- Everyone chooses their **interface language** with the button at the bottom of the menu (also on the sign-in pages); the choice is saved.
- Amounts and dates follow the language (1.234,56 € / €1,234.56).
- The company's **document language** for PDFs, e-mails to customers and suppliers and notes written by the app in the history.
- Data written by people (notes, replies, names of roles and queues) stays as it was written.

Roles and permissions

For whom: Administrators

In Orafila, what a person sees and can do depends on their **roles**. A role is a set of **permissions**; a person can have several roles and gets all their permissions combined. Roles are managed in **Settings › Roles** and given to people in **Settings › Users**.

Orafila

Demo Software Srl

Dashboard

Tickets3

Inbox1

Customers3

Calendar

Sales

Customer orders1

Invoices and receipts1

Purchasing and stock

Suppliers

Supplier orders1

Products and stock1

Order tracking

Administration

Income and expenses1

Accounting

Employees and absences1

Reports

Company

Document details

Users

Roles

Queues and mail

Notifications

Fatture in Cloud

Artificial intelligence1

Products

Activity log

Tecnico

Change the name or the permissions: changes apply at once to everyone who has the role.

Role name for example Warehouse operator or Accounts

Tecnico

Permissions

Choose what whoever has this role can see and do. Every edit permission includes the one to see: if you choose "Manages customer orders", "Sees customer orders" is added automatically.

Support

☒ Sees tickets (needed by a chosen edit permission)

☒ Works on tickets

☐ Assigns tickets

☒ Sorts the inbox

Customers

☒ Sees customers

☐ Edits customers

Sales and invoices

☐ Sees customer orders

☐ Manages customer orders

☐ Sees invoices and receipts

☐ Issues invoices and records payments

Purchasing and stock

☐ Sees suppliers and supplier orders

☐ Manages suppliers and supplier orders

☐ Sees products and stock

☐ Manages products and stock

Administration

☐ Sees income, expenses and accounting

☐ Records income and expenses

☐ Sees reports

People

☐ Sees employees and absences

☐ Manages employees and approves absences

Calendar

Company

Who has this role

3 people. To remove or add the role, open the person's page.

Luca Moretti

Marco Galli

Sara Conti

Delete the role

Only a role that nobody has can be deleted: first give the 3 people above another role.

?

Help with this page

Editing a role

The permissions

There are 23, grouped by area as on the roles page. The “Description” column completes the sentence “This role...”.

Area	Permission	Description
Support	<code>tickets.read</code>	sees tickets
	<code>tickets.write</code>	works on tickets (replies, changes the status, logs time, takes tickets)
	<code>tickets.assign</code>	assigns tickets to colleagues
	<code>inbound.manage</code>	sorts the inbox
Customers	<code>customers.read</code>	sees customers
	<code>customers.write</code>	edits customers (including contracts, hour banks, contacts, installed products, CSV import)
Sales and invoices	<code>sales.read</code>	sees customer orders
	<code>sales.write</code>	manages customer orders

Area	Permission	Description
	<code>invoices.read</code>	sees invoices and receipts
	<code>invoices.write</code>	issues invoices and records payments
Purchasing and stock	<code>purchases.read</code>	sees suppliers and supplier orders
	<code>purchases.write</code>	manages suppliers and supplier orders
	<code>inventory.read</code>	sees products and stock
	<code>inventory.write</code>	manages products and stock
Administration	<code>finance.read</code>	sees income, expenses and accounting
	<code>finance.write</code>	records income and expenses
	<code>reports.read</code>	sees reports
People	<code>employees.read</code>	sees employees and absences
	<code>employees.write</code>	manages employees and approves absences
Calendar	<code>calendar.read</code>	sees the whole company and group calendars
	<code>calendar.write</code>	adds events to the calendar
Company	<code>ai.use</code>	uses the AI assistant
	<code>settings.manage</code>	manages settings and users

Every edit permission includes the one to see: if you choose “manages customer orders”, the page adds “sees customer orders” by itself.

The seven default roles

Every company starts with these roles (with these English names if the company is activated in English, with Italian names otherwise). They can be changed, and others can be created (for example “Warehouse operator” or “Bookkeeping”).

Permission	Administrator	Support manager	Technician	Sales	Accounts	Warehouse	Human resources
sees tickets	✓	✓	✓	✓			
works on tickets	✓	✓	✓				
assigns tickets	✓	✓					
sorts the inbox	✓	✓	✓				
sees customers	✓	✓	✓	✓	✓		
edits customers	✓	✓					
sees customer orders	✓			✓	✓	✓	
manages customer orders	✓			✓			
sees invoices and receipts	✓			✓	✓		
issues invoices and records payments	✓				✓		
sees suppliers and supplier orders	✓				✓	✓	

Permission	Administrator	Support manager	Technician	Sales	Accounts	Warehouse	Human resources
manages suppliers and supplier orders	✓				✓	✓	
sees products and stock	✓			✓	✓	✓	
manages products and stock	✓					✓	
sees income, expenses and accounting	✓				✓		
records income and expenses	✓				✓		
sees reports	✓	✓		✓	✓		✓
sees employees and absences	✓				✓		✓
manages employees and approves absences	✓						✓
sees the whole company and group calendars	✓	✓	✓	✓	✓	✓	✓
adds events to the calendar	✓	✓	✓	✓	✓	✓	✓
uses the AI assistant	✓	✓	✓	✓	✓	✓	✓
manages settings and users	✓						

Rules to know

Combinations of permissions

- **Order tracking** has no permission of its own: it shows customer orders to people who see them and supplier orders to people who see those.
- **“Create invoice”** from an order requires seeing customer orders and issuing invoices (for example the Accounts role).
- **Recording a supplier's invoice** from an order requires seeing supplier orders and recording income and expenses.
- **Settings › Products** (the catalogue of installed products) requires managing settings and editing customers.
- The **internal cost and margin** of tickets are visible to people who see reports; the **hourly cost** of employees only to people who manage them; the **expenses** recorded on a supplier's page only to people who see income and expenses.
- In **reports**, each section also requires the permission of the area the figures come from (Sales with invoices, People with employees and so on).

What applies to everyone

- Dashboard, Password and sessions, the language, the “Help with this page” button, the guides and the health check (limited to the modules the person can see). AI answers require “uses the AI assistant”.
- **My absences** requires no permission: the user only needs to be linked to a record in Employees and absences.

Who receives what

- Only active users with a role that works on tickets appear among the agents a **ticket can be assigned to**.
- The **reorder level** alert goes to people who manage products and stock; **absence requests** go to people who manage employees, and the decision goes to the person who asked.

Calendar

- Everyone sees every group's calendar, but writes only in the whole company calendar and in their own groups' calendars; people who manage settings and users write in all of them and create the groups.
- Colleagues' absences appear as “Away”, without the type, to people who cannot see employees and absences.

Protections

- The company **always has at least one active administrator**: the last one cannot be removed, and nobody can suspend themselves or remove their own administrator role.
- A role can be deleted only if nobody has it.
- Permission changes apply **from the next page** the person opens, with no need to sign out.
- Every action is **checked again on the server**: hiding a button is not the only safeguard against anyone trying to get round the interface, because the request is refused if the permission is missing.
- Every change to users and roles goes into the **activity log**.

Artificial intelligence

For whom: Management, privacy, IT

In Orafila, artificial intelligence does the repetitive work (sorting, writing a first draft, summarising, explaining) and leaves the decisions to people. It is **optional**: without AI the application works in full.

Orafila

Demo Software Srl

Dashboard

Tickets3

Inbox1

Customers3

Calendar

Sales

Customer orders1

Invoices and receipts1

Purchasing and stock

Suppliers

Supplier orders1

Products and stock1

Order tracking

Administration

Income and expenses1

Accounting

Employees and absences1

Reports

CompanyDocument detailsUsersRolesQueues and mailNotificationsFatture in CloudArtificial intelligence1Products

Activity log

Artificial intelligence

Which AI agent answers, how much has been spent and how much credit is left. Agents only propose: nothing is saved or sent without a person.

The server has no provider's key (ANTHROPIC_API_KEY, OPENAI_API_KEY or GEMINI_API_KEY): until one is set, the AI features stay manual. Ask whoever runs the server to set at least one.

AI credits

Estimates from the tokens of each request and the providers' list prices, in dollars as they bill. The real balance and invoices are in each provider's console.

\$3.10

\$10.00

\$6.90

\$3.56

Spent this month (estimate, 239 requests)

Budget for the month

Left

By month end, at this pace

Within limits

31% of the month's budget used.

Anthropic

Within limits

About \$14.68 left of the \$25.00 loaded on 1 Aug 2026 (\$10.32 spent since).

Agents, budget and credits

Main agent

It answers every AI feature without an agent of its own. Prices are the provider's list prices, in dollars per million tokens: input (what the AI reads) and output (what it writes).

Anthropic

Key missing on the server (ANTHROPIC_API_KEY)

Claude Opus 5.5

Most capable

Anthropic's most capable model: the best for the assistant and for hard cases.

This month, by agent

Agent	Requests	Spend
Claude Opus 5.5 Anthropic	72	\$2.58
Claude Sonnet 5.5 Anthropic	57	\$0.50
Claude Haiku 5.5	110	\$0.03

Artificial intelligence settings

What it does

Feature	Where	What it produces	Who decides
Ticket triage	Automatic on every ticket opened from an e-mail (the proposal is saved on the ticket as a suggestion); on request with “Analyse with AI” in the ticket	Category, priority and product (chosen only from those the company has configured), summary, the customer's tone, missing information to ask for, possible duplicate of an open ticket, suggested agent: the AI chooses it by looking at each agent's skills and open tickets; if it names nobody, Orafila suggests whoever has the suggested category among their skills (Settings › Users) and the fewest open tickets, otherwise the least busy of all	The agent applies the suggestions with one click, or not. With low confidence, urgent priority or an unrecognised customer, the panel asks you to check carefully

Feature	Where	What it produces	Who decides
Reply draft	In the ticket, "Write a draft with AI"	A reply to the customer based on the conversation, with a note for the agent on what to check	The agent reads it through, corrects it and sends it. The draft on its own is neither saved nor sent. The AI is instructed not to promise dates, discounts or free-of-charge work and not to repeat the internal notes: reading it through remains essential
Customer briefing	Customer page, "Prepare the briefing with AI"	A summary of the situation and up to 4 recommended actions, each with the department responsible	It is a proposal: it is not saved
Assistant	The Assistant page and the "Help with this page" panel on every page	Answers on how to use Orafila and on why something is not working, with the steps and links to the pages	The person. The assistant only reads : it changes nothing and never says it has done something

Orafila
Demo Software Srl

Dashboard
Tickets **3**
Inbox **1**
Customers **3**
Calendar
Sales
Customer orders **1**
Invoices and receipts **1**
Purchasing and stock
Suppliers
Supplier orders **1**
Products and stock **1**
Order tracking
Administration
Income and expenses **1**
Accounting
Employees and absences **1**
Reports

Fatturazione molto lenta dopo l'aggiornamento

TCK-197 In progress High [Tessiture Biellesi Srl](#) [Back to the list](#)

Resolution
Over by 4 h working time
Target 16 h working time, 20 h used
First response given on 22 Oct, 17:19.

Conversation

Roberto Sella Customer 22 Oct, 16:19
Dall'aggiornamento di lunedì l'emissione di ogni fattura richiede alcuni minuti. Con la chiusura del mese è un problema serio.

Sara Conti Agent 22 Oct, 17:19
Abbiamo ricevuto la segnalazione: analizziamo i tempi del database e vi aggiorniamo entro oggi.

Sara Conti Internal note 23 Oct, 17:55
Gli indici delle tabelle dei documenti non sono stati ricostruiti dopo l'aggiornamento. Ricostruzione pianificata stasera, fuori orario.

Sara Conti Agent 26 Oct, 17:55
Stanotte abbiamo ricostruito gli indici: i tempi sono migliorati ma non sono ancora quelli di prima. Continuiamo l'analisi oggi.

Customer
Name [Tessiture Biellesi Srl](#)
Contact **Roberto Sella**
roberto.sella@tessiturebiellesi.example
+39 015 000 501
Products **Gestionale ERP 10.9** on the customer's premises
Paghe Web 2026.1 in the cloud

Details
Queue Assistenza
Category Errore applicativo
Product Gestionale ERP
Opened on 22 Oct, 16:19

Coverage
Pacchetto 60 ore Available
54 h 30 min left of 70 h, valid until 26 Feb 2027.

Assistant · help with this page [Close](#)
Tickets
You are looking at: ticket number 197
What it is for
Customers' support requests, received by e-mail or logged over the phone: conversation, internal notes, status, assignment, service times (SLA), time worked that is deducted from the hour bank, weight on the ticket allowance and AI suggestions.
To check here [Check again](#)

Problem
2 tickets have exceeded the service times
Times are counted in working hours, according to the company's calendar and targets.
What to do: Open the ticket list: they are at the top, sorted by urgency. Reply or update the status; if you are waiting for the customer, set the ticket to "Waiting for customer", which stops the resolution time.
[Open the tickets](#)

To check
2 tickets are close to the service-time limit
They have used at least 80% of the time allowed.
What to do: Work on them first: in the ticket list they come right after those already past their time.
[Open the tickets](#)

To check
3 tickets are not assigned to anyone
A ticket with no assignee does not appear among any agent's tickets.
What to do: Open the unassigned tickets and press "Take ticket", or, in the ticket's details, choose a colleague in "Assign to" and press "Assign the ticket".
[Open the unassigned tickets](#)

The assistant on a page

Two features are already built into the application's engine but not yet available in the pages: the **work report from notes** (time entries proposed from written or dictated notes) and the **quote from requirements** (price list lines with quantities, a summary and questions for the customer).

The principles

- AI suggests, people decide.** No e-mail written by the AI goes out and no ticket changes without a person's click; the only thing the AI saves by itself is the triage proposal on the ticket, which remains a suggestion until an agent applies it.

2. **The AI does not calculate the numbers.** Service times, balances, totals, VAT, possible statuses, customer health and sender recognition are calculated by deterministic rules and reach the AI ready-made.
3. **Constrained choices.** Categories, products, agents, modules and pages are passed to the AI as closed lists; every answer is checked again and a value outside the list is discarded. The assistant can only suggest links to known pages of the application.
4. **Customers' texts are data, not instructions.** E-mails, questions and the results of look-ups are kept separate from the instructions, which explicitly say not to follow orders contained in those texts (protection against *prompt injection*). In any case the assistant reads only what the person's role can already see.
5. **It also works without AI.** Guides and the health check are deterministic; without AI, questions search the guides, triage falls back to manual choices and every feature has its alternative.

Agents and providers

Each company chooses **which AI agent answers** in **Settings > Artificial intelligence**: a **main agent** and, if it wishes, a different agent **for each feature** (assistant, ticket triage, reply drafts, customer briefings). For example, a cheap agent for triage, which makes many simple requests, and the most capable one for the assistant.

Provider	Most capable	Balanced	Fast and cheap
Anthropic	Claude Opus 5.5	Claude Sonnet 5.5	Claude Haiku 5.5
OpenAI	GPT-6 Astra	GPT-6.1 Sol	GPT-6 Luna
Google	Gemini 4 Argon	Gemini 3.8 Flash	Gemini 3.5 Flash-Lite

- A provider is **available** when its API key is on the server (`ANTHROPIC_API_KEY` , `OPENAI_API_KEY` , `GEMINI_API_KEY`). One is enough. The keys are only in the server configuration: they never pass through the pages or the database.
- If the company does not choose, the server's default agent answers (Claude Opus 5.5, unless configured otherwise).
- Instructions, tools and checks are **the same for every agent**: quality and cost change, not behaviour.
- The page shows the list price per million tokens next to each agent.

Costs, budget and credits

- **Every request is measured**: feature, provider, model, input and output tokens, outcome and **estimated cost** from list prices, in dollars as the providers bill.
- The **AI credits** panel shows the month's spend, the budget, what is left, the **projection to the end of the month**, the spend by agent and by feature and the last six months. Administrators also see the month's spend on the dashboard.
- Optional **monthly budget**: at 80% the health check warns. With **“Stop the AI when the month's budget is used up”** the AI features go back to manual until the first of the following month (the assistant answers with the guides); without it, the AI carries on and the health check warns. The check takes place before each request, so a single long answer can go slightly over the budget.
- **Credit with each provider**: if you pay the providers in advance, you write the balance shown in the provider's console and the date; Orafila subtracts the estimated spend since that day. It is an **estimate**: it does not see use of the same key outside Orafila, nor the provider's discounts or taxes.
- **How to keep costs down**: the instructions common to all requests are written so that the provider can cache them, where the provider supports it (cached parts cost less); use a cheap agent for triage and the most capable one only for the assistant; the panel never calls the AI by itself, only when a person asks. A question to the assistant can require several look-ups (at most 6 rounds) and is recorded as a single request with the tokens added together.

What data is sent to the AI provider

Only when an AI feature is used, and only the data that feature needs:

Feature	Data sent
Triage	Sender's address, subject and text of the e-mail (up to 8,000 characters); name of the recognised customer; the company's (or the customer's) categories and products; name, skills (the ticket categories set for each of them in Settings › Users) and workload (open tickets) of the agents who can work on tickets; subject and number of the same customer's open tickets
Reply draft	Ticket number and subject, customer name, the agent's name for the signature, the conversation (including internal notes, marked as such so that the AI does not repeat them to the customer), any knowledge base articles
Customer briefing	Customer name, health score and signals, facts about contracts, hour banks, ticket allowance, last contact and installed products; subjects of recent tickets (only if the person asking can see tickets)
Assistant	The question and the current conversation, the name of the person asking and of the company, the page the question is asked from, the Orafile guides and the results of read-only look-ups in the modules the role can see. The results may include the addresses of senders in Inbox, of recipients of e-mails that were not sent and of users (for people who manage users)

Never sent: passwords, tokens, two-step verification secrets, mailbox passwords, Fatture in Cloud tokens. The assistant's tools do not return the e-mail addresses and phone numbers of customers' contacts, nor the billing details on orders and invoices (VAT number, address, PEC, the certified e-mail address), nor the addresses that order and invoice e-mails were sent to. The reply draft also receives the ticket's internal notes, marked as such.

Retention by the provider: depends on the terms of the chosen provider. With OpenAI, Orafile asks for conversations not to be stored (`store: false`). For Anthropic and Google, their API terms of use and their data processing agreement apply: check them before turning on AI (see [Security and privacy](#)).

How to limit or turn off AI

What you want	How
No AI requests for the whole company	Settings › Company, untick “Use the AI assistant”: Orafile no longer sends any request to the AI
AI only for some people	Remove the “uses the AI assistant” permission from the other people's roles (Settings › Roles). Automatic triage of incoming e-mails stays active as long as AI is on for the company
Spending cap	Monthly budget with “Stop the AI when the month's budget is used up”
No AI on the whole installation	Do not set any API key on the server

In every case the guides, the health check, the numbers in the menu and the manual procedures remain available.

Reliability

- Refusals, truncated answers or answers that do not match the expected schema are not used: the page says the suggestion is not available and the agent carries on by hand.
- Provider errors (invalid key, credit used up, network) are recorded and reported by the health check and on the dashboard.
- With Claude Opus and Sonnet, if the provider refuses a request because of its safety filters, the request is automatically repeated on an alternative model from the same provider.

Security and privacy

For whom: Privacy, DPO, IT

This document describes Orafila's security measures and how it fits into the obligations of the GDPR. It can be used as the basis for the annex on **technical and organisational measures** (Art. 32 GDPR) of the data processing agreement.

The guidance on the GDPR is practical and **is not legal advice**: contracts should be checked with a privacy consultant or with the DPO.

In brief

Area	Measure
Separation between companies	PostgreSQL Row-Level Security enforced on every table, foreign keys that include the company, a database role without privileges; the app stops at start-up if the role can bypass the isolation
Access	Passwords of at least 12 characters (bcrypt hash), two-step verification mandatory for everyone , logout for 15 minutes after 5 attempts, 12-hour server-side sessions
Authorisation	Roles and 23 permissions; every page and every action checks the permission again on the server
Encryption in transit	HTTPS with Let's Encrypt certificates renewed automatically, HSTS; with an external database, TLS with mandatory certificate verification
Encryption of secrets	Two-step verification secrets, mailbox passwords and Fatture in Cloud tokens encrypted with AES-256-GCM; for session and invitation tokens only the fingerprint (hash) is kept
Traceability	An activity log that cannot be changed or deleted from the application, without secrets
Backups	Every night, encrypted, verified and copied to separate storage; the private key must also be kept off the server
Infrastructure	Database not reachable from the internet, application containers with a read-only file system and without privileges, automatic operating system security updates
AI	Optional, can be turned off per company, read-only, data limited to what is needed, never secrets

1. Separation of data between companies

Orafila is **multi-company**: several companies can use the same installation, each with its own company code.

- Every table with a company's data has the company column and a PostgreSQL **Row-Level Security** rule that is **enforced** (it also applies to the owner of the tables). Every operation of the application sets the company of the person signed in; with no company set, the database returns zero rows: **in case of error the system stays closed**.
- **Foreign keys include the company**: a record cannot point to a record of another company, even if the code were wrong.
- The application connects with a **role without privileges** (not a superuser, without `BYPASSRLS`, not the owner of the tables). At start-up the app and the mail worker **check their own role and stop** if it could bypass the isolation.
- The isolation is verified by **automated tests** that fail if a table is left uncovered or if a company manages to see another company's data.
- Queries always use **values as parameters**: SQL injection is ruled out by design.

2. Access and sessions

- **Passwords:** at least 12 characters; stored only as a salted **script** hash; never written to the logs or to the activity log.
- **Two-step verification (TOTP)** mandatory for everyone, turned on at the first sign-in; QR code generated by the application, without external services; encrypted secret; each code is valid only once. The IP address never decides authentication.
- **Lockout** after 5 wrong attempts (password or code) for 15 minutes, also when changing the password; the error message does not say which of company code, e-mail and password is wrong, and checking the password takes the same time even for a user that does not exist.
- **Sessions** server-side for 12 hours, in `HttpOnly`, `Secure`, `SameSite=Lax` cookies; only the fingerprint of the token is kept. Everyone sees their own sessions (device, IP, expiry) and can close the others; changing the password closes them.
- **After sign-in** you always go to the dashboard or to turning on two-step verification: no redirects to external addresses.
- **Invitations** are single-use and valid for 7 days; there is no automatic password recovery by e-mail (an administrator does it by resetting the access).
- **Suspending** a user: their sessions are closed immediately.

3. Authorisation

- 23 permissions grouped into roles (see [Roles and permissions](#)). Visibility rules are declarative, never code stored in the database.
- **Double check:** the page checks the permission and shows a notice; the action on the server checks it again; downloads (PDF, CSV) check it too.
- The company always has at least one active administrator.

4. Encryption

- **In transit:** HTTPS is mandatory, with a Let's Encrypt certificate obtained and renewed automatically; HTTP is redirected to HTTPS; HSTS header (2 years). Connections to mailboxes are always encrypted (TLS or STARTTLS). With an external database the connection is always TLS with **certificate verification** (`verify-full` or `verify-ca`): a configuration without verification is refused.
- **Application secrets:** encrypted with **AES-256-GCM** with a key (`APP_ENCRYPTION_KEY`) that is only in the server configuration and must also be kept off the server, in a password manager.
- **Backups:** encrypted with **age** using a public key. The private key is created on the server (it is used to verify every backup) and must be copied into a password manager: without it, the backups cannot be opened. Anyone who has only the backup files, including the storage provider, cannot read them.
- **Disks:** encryption of the server's disks depends on the hosting provider you choose.

5. Activity log

- It records who did what and when: successful and failed sign-ins with the IP address, password changes, sign-outs from other devices, users and roles, customers and contracts, tickets, products and stock, documents, settings.
- The application's role **can neither change nor delete** the log.
- It never contains passwords, codes, tokens, secrets or unnecessary personal data; it stores codes and details, read in the language of the person consulting it.
- Administrators can consult it, with filters by area, person, period and text.

6. Protection of the application and the infrastructure

- **Security headers** on every page: `X-Frame-Options: DENY`, `X-Content-Type-Options: nosniff`, `Referrer-Policy: same-origin`, `Permissions-Policy` (no camera, microphone or location), `Strict-Transport-Security`; the server does not disclose the software it uses.
- **Request limits**: 8 MB per request to the web server, 4 MB for forms (CSV import), 2 MB for e-mails received from the gateway.
- **Mail**: no connections to internal or private network addresses (against SSRF attacks), no loops of automatic replies, headers that discourage automatic replies, customers' e-mails never deleted from the mailbox.
- **Containers**: app, mail worker, migrations and tools with a read-only file system, no Linux *capabilities*, no privilege escalation and a non-administrator user; Caddy read-only with only the capability to open ports 80 and 443; the database in the official PostgreSQL image; memory limits for all of them.
- **Network**: the database is on an internal network without internet access and without public ports; only ports 80 and 443 of the HTTPS proxy are exposed.
- **Server**: Ubuntu and Docker security updates installed automatically every day; SSH access with keys only (recommended in the installation guides).
- **Orafile updates**: they arrive as a package with the provider's **digital signature**; the installer and `deploy/nova.sh` update check the signature and the fingerprint of every file before changing anything, take a backup and never go back to an earlier version by themselves. The provider can give each server its own access credentials and revoke them.
- **Health check endpoint** (`/api/health`): answers only "ok" or "unavailable", with no data.
- **Logs**: the messages of the mail worker and of e-mail reception do not include addresses, texts or secrets; container logs rotate automatically (5 files of 10 MB per service).

7. Backups and continuity

- **Full database backup every night** at 02:30 (Italian time), encrypted and **verified** before being kept; a backup missed while the server was off is taken at restart.
- Copies: the last **7 on the server** and a copy on **external S3-compatible storage** (for example Oracle Object Storage or DigitalOcean Spaces) for **30 days**. On Oracle Object Storage, if you create the retention rule described in the guide, backups cannot be deleted for 29 days, not even with the server's keys.
- An e-mail alert if a night's backup fails, by setting up an external monitoring service (for example Healthchecks.io).
- **Restore in one command**, preceded by a safety backup: the backup is loaded into a temporary database that replaces the current one only if the load succeeds (with an external database, in a single transaction).
- **Maximum data loss** with the nightly backup alone: the changes made after the last backup (at most about 24 hours). With a database managed by the cloud provider, its backups and, where offered, point-in-time recovery are added.
- The procedures for restoring and for rebuilding on a new server are described and must be **tested** when the service starts (see [Operations and maintenance](#)).

8. Personal data processed

Category of data subjects	Data	Notes
The company's users	Name, e-mail, language, roles, hourly cost, last sign-in, password hash, encrypted TOTP secret, sessions (device, IP), sign-ins in the activity log	

Category of data subjects	Data	Notes
Customers' contacts	Name, e-mail, phone, role in the company, contact person for, consent to marketing communications	E-mails from a contact open tickets in the customer's name
E-mail senders	Address, subject and text of the e-mails received by the queues	Unknown e-mails stay in Inbox; attachments are not imported
Customers and suppliers (legal entities and sole traders)	Tax details, addresses, PEC (certified e-mail), suppliers' IBAN, commercial documents	
Employees	Name, e-mail, phone, work details (job title, department, contract, hours, start and end dates), hourly cost, notes, absences with an optional note	For sick leave only the dates are recorded: the form asks you not to write diagnoses or certificates in the note (it is a reminder, not a block). The type of absence is seen by those with "sees employees and absences" (by default Administrator, Accounts and Human resources); everyone else sees "Away"

9. Roles in the processing (GDPR)

- The **controller** is the company that uses Orafila for its own customers, contacts and employees.
- The **processor** (Art. 28) is whoever provides the service, if Orafila is supplied as a managed service: a data processing agreement (DPA) is needed.
- Possible **sub-processors**, to be listed in the DPA according to the installation:

Service	When	What it receives
Hosting provider (for example Oracle Cloud, DigitalOcean or another EU provider)	Always	The server, the database and the encrypted backups
Backup storage (from the same provider or another one)	If configured	Only encrypted backups, unreadable without the key
AI provider (Anthropic, OpenAI, Google)	Only if AI is on	The data listed in Artificial intelligence
Fatture in Cloud	Only if connected	The invoices issued, with the customer's data; usually a direct contract between the company and the service
Mailbox providers and sending services	Always, if mailboxes are connected	Outgoing and incoming e-mails; usually the company's own services
E-mail forwarding gateway	Only if used	The forwarded e-mails

- Where the data is:** in the server region chosen at installation. The installation guides use European Union regions (Milan, Frankfurt, Amsterdam). For AI providers, check where they process the data and their terms.

10. Data subjects' rights and retention

- Access and rectification:** data is consulted and corrected from the module pages.
- Erasure:** contacts, sites, installed products, products, suppliers, employees and other records are deleted from the interface when they are not used elsewhere; those linked to documents or history (for example a contact mentioned in a ticket, an issued invoice) are changed instead of being deleted, so as not to falsify the history and the tax documents. **Customers, users, tickets and received e-mails cannot be deleted from the interface** (users are suspended): a request to erase this data is handled by the platform operator.
- Portability:** CSV exports of income and expenses and of the reports; a complete export of a company's data is not yet available from the interface and is a task for the platform operator, on request.

- **Retention:** at present there are no automatic deletions on expiry (for example of tickets closed years ago); retention periods must be decided by the controller and applied on request.

11. Secure development

- Every change to the code goes through automated checks: strict type checking, hundreds of unit and integration tests on real databases, SQL tests of the isolation between companies, building the image.
- **Secret scanning** of the code and **checks for known vulnerabilities** in the dependencies on every change.
- No secrets in the code: keys and passwords are only in the server configuration.
- PDFs generated in pure JavaScript, with no browser and no external services on the server.

12. What remains the customer company's responsibility

- Assign roles with the **minimum permissions** needed and suspend anyone who leaves the company straight away.
- Check the **activity log** periodically (for example failed sign-ins).
- Use mailboxes dedicated to the queues, with app passwords where the provider requires them.
- Decide which AI features to turn on and, if necessary, inform your own customers and employees.
- With an installation on your own server: keep `deploy/.env`, the backup key and `APP_ENCRYPTION_KEY` in a password manager, test the restore, keep an external check of the site and of the backups running.

Requirements and architecture

For whom: IT

For people who use Orafila

What	Requirement
Browser	Chrome or Edge 111 and later, Firefox 111 and later, Safari 16.4 and later (versions from 2023 onwards), with JavaScript and cookies enabled
Devices	Computer, tablet and phone: the pages adapt to the screen
Two-step verification	A phone with an authenticator app (Google Authenticator, Microsoft Authenticator or similar)
Local installations	None: Orafila is used from the browser
Network	Access to the installation's HTTPS address (for example <code>https://psa.yourcompany.com</code>)

For people who install the server

What	Requirement
Operating system	Ubuntu Server 24.04 LTS (also 22.04), 64-bit, x86-64 (amd64) or Arm (arm64) processors
Processor	1 vCPU for a demo, 2 or more recommended
Memory	2 GB or more recommended. With less than 3.5 GB of RAM the preparation script creates 2 GB of spare memory on disk (swap) by itself; building the application needs at least 768 MB of RAM and 2.8 GB of RAM and swap together. 1 GB with swap is enough for a demo
Disk	25 GB for a demo, 50 GB recommended (images, database, local backups); start-up frees the cache by itself when less than 4 GB is left
Public address	A public IPv4 address and a domain name (DNS record of type A pointing to the server) for the HTTPS certificate
Inbound ports	TCP 80 and 443, UDP 443 (HTTPS and HTTP/3); TCP 22 for administration over SSH, preferably only from your IP
Outbound ports	HTTPS 443 (certificates, updates, AI, Fatture in Cloud, backup storage); IMAP 993 (or 143 with STARTTLS); SMTP 465 or 587, or 2525 if the provider blocks the mail ports
Software	Docker Engine with the compose plugin, age, rclone: the preparation script installs them. curl and OpenSSL, which download and check the package, are already in Ubuntu
Access to the package	The HTTPS release address of Orafila and, if the provider uses them, the server's access credentials (also needed for updates)

Providers already tested, with step-by-step guides: **Oracle Cloud** (Always Free Arm VM, Milan or Frankfurt regions) and **DigitalOcean** (Droplet, Amsterdam or Frankfurt regions). Any other Ubuntu VPS, for example in the European Union (Aruba, OVHcloud, Hetzner...), works the same way: only the creation of the server and the provider's firewall change.

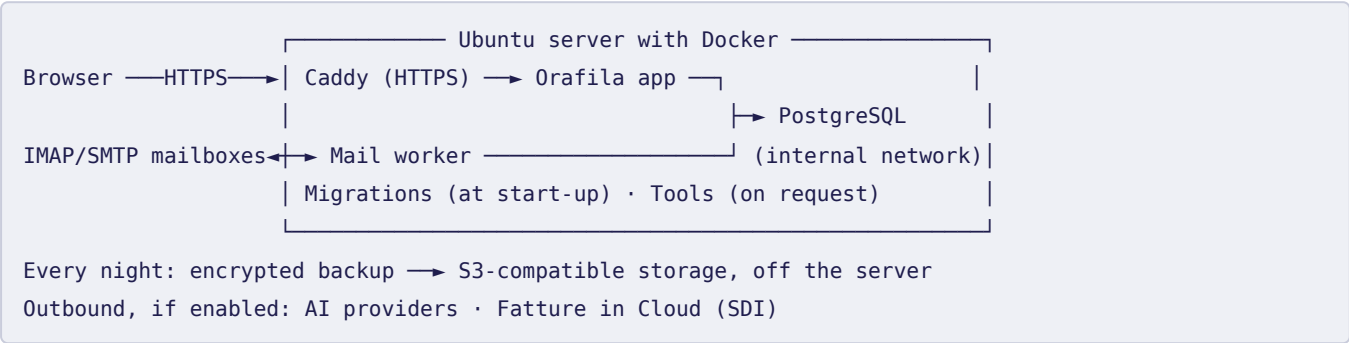
With an external database (optional)

If the database must be outside the server (a database managed by the cloud provider or the company's own PostgreSQL server):

- PostgreSQL **15 or later** with TLS, in the same region as the server;
- a database dedicated to Orafila, reachable only from the server's IP;

- the provider's certificate authority (CA) certificate in PEM format;
- a database administrator with permission to create roles and databases (`CREATEROLE` , `CREATEDB` ; with `BYPASSRLS` Orafila's backups work too);
- at least **25 connections** available.

Architecture



Component	What it does
Caddy	Receives visits on ports 80 and 443, obtains and renews the HTTPS certificate by itself (Let's Encrypt), forwards to the app
App	The web application (pages, actions, PDFs, exports, endpoints for e-mails and for the health check)
Mail worker	Reads the queues' IMAP mailboxes every minute, sends queued e-mails via SMTP with retries, asks the AI to triage new tickets
PostgreSQL 16	The database, on an internal network without internet access and without public ports
Migrations	Update the database schema at every start, then stop; the app and the mail worker start only afterwards
Platform operator tools	Activating companies, queue addresses, sample data: commands run on request

- **A single Docker image** for app, mail worker, migrations and tools, built on the server from the source code.
- **Separate networks:** the database is only on the internal network; the app and the mail worker have outbound internet access, which they use for AI, mail and Fatture in Cloud.
- **Health checks:** the app answers on `/api/health`; the mail worker reports every 15 seconds that it is alive; Docker restarts by itself any service that stops.
- **Multi-company:** a single installation serves several companies, kept separate by the database (see [Security and privacy](#)).

Technologies

Layer	Technology
Language	TypeScript in strict mode, on Node.js 22
Web	Next.js 16 (App Router) and React 19, server-side rendering
Database	PostgreSQL (16 in the package, 15 or later supported) with Row-Level Security
Data access	postgres.js with parameterised queries, schema in plain SQL with numbered migrations
Mail	IMAP (imapflow), SMTP (nodemailer), message parsing (mailparser)
PDF	pdf-lib, in pure JavaScript: no browser or external service on the server
AI	Official Anthropic SDK; OpenAI and Google Gemini APIs

Layer	Technology
E-invoice	Fatture in Cloud API v2
HTTPS	Caddy 2 with Let's Encrypt
Backup	pg_dump, age encryption, copy with rclone to S3-compatible storage
Containers	Docker Engine and Docker Compose

Sizing

A single installation serves several companies. For a pilot company or a demo a server with 2 GB of RAM is enough; with many companies or many concurrent users you increase the memory and processors of the same server (the services' memory limits are: database 2 GB, app 2 GB, mail worker 1 GB, Caddy 256 MB). With an external database the database load moves to its own server.

Installation

For whom: IT

This document explains how Orafila is put into service: the delivery options, installation on a server with the Docker package, the optional external database, a trial run on a computer and the configuration reference.

The step-by-step guides with screenshots of the cloud providers, written also for people who are not system administrators, are in the package:

- Deployment on Oracle Cloud (in Italian): a free Always Free VM, suitable for demos and pilots;
- Deployment on DigitalOcean (in Italian): a paid Droplet, also suitable for customers in production;
- External database (in Italian).

1. Delivery options

	Managed service	Dedicated installation
Who manages the server	The Orafila provider	The provider or the company's IT, on the server the company chooses
What the company receives	The application's address, the company code and an invitation link for the first administrator	A complete installation, possibly with several companies (for example the companies of a group)
Installation	None for the company	An Ubuntu server with Docker, about 2-3 hours the first time (almost all of it waiting)
Updates and backups	Taken care of by the provider	One command to update; automatic nightly backups once configured
AI keys	The provider's or the company's, depending on the contract	The company's, with its own direct contract with the AI provider

In both cases the application is the same and each company's data is kept separate by the database. With the managed service the company starts from [step 8 of this document](#) and then from [Getting started with a company](#).

2. Before you start

- ☐ An **Ubuntu 24.04 server** (or 22.04) that meets the requirements in [Requirements and architecture](#), reachable via SSH with a key.
- ☐ A **domain name** whose DNS you can change (for example `psa.yourcompany.com`) and an **e-mail address** for registering the HTTPS certificates.
- ☐ The **release address** of Orafila and, if the Orafila provider uses them, the server's **access credentials** (Client ID and Client Secret): the provider sends them (step 4).
- ☐ A **password manager** in which to save the keys generated by the installation. It is essential.
- ☐ Optional: an Anthropic, OpenAI or Google **API key** for AI; an S3-compatible **bucket** for the copy of the backups; an account with an **external monitoring** service (for example Healthchecks.io and an uptime service).

From here on, commands that start with `deploy/` are typed **on the server, from the `orafila` folder**.

3. Creating the server and the DNS

1. Create the server with the provider you have chosen, preferably in a European Union region. The Oracle and DigitalOcean guides describe every screen.

2. In the provider's firewall open inbound **TCP 80, TCP 443 and UDP 443** from everywhere, and **TCP 22** (SSH) preferably only from your IP address.
3. In the domain's DNS create an **A record** with the chosen name (for example `psa`) pointing to the server's public IP. Before going on, the name must answer with the right IP (`nslookup psa.yourcompany.com`).

4. Downloading the package

Orafile is downloaded with the **installer**: it takes the latest version from the release server, checks its **digital signature** (the proof that the package comes from the Orafile provider and that nobody has altered it) and creates the `orafila` folder. Instead of `https://rilasci.orafila.com`, use the release address the provider gave you:

```
cd ~
curl -fsSL0 https://rilasci.orafila.com/install.sh
bash install.sh
cd orafila
```

If the provider sent you the installer's fingerprint, before `bash install.sh` check that `sha256sum install.sh` prints the same one. If the release server is protected, the installer asks for the **Client ID** and **Client Secret** and saves them in `deploy/.env`: updates need them too. No `sudo` is needed and nothing changes outside the `orafila` folder. If the installer reports that the signature does not match, do not go on and tell the Orafile provider.

5. Preparing the server

```
sudo deploy/setup-host.sh
```

The script (5 to 15 minutes; it can be run again without harm):

- recognises the provider (Oracle Cloud, DigitalOcean or another Ubuntu);
- creates 2 GB of swap on servers with less than 3.5 GB of RAM;
- updates Ubuntu and turns on **automatic security updates**;
- installs **Docker** (from Docker's official repository), git, age and rclone;
- opens ports 80 and 443 in the server's internal firewall, if it blocks them;
- **checks whether the outbound SMTP ports are blocked** (465, 587) and suggests port 2525.

As a user other than `root` (for example `ubuntu` on Oracle), log out and back in with SSH so that the `docker` group applies to you too; `docker ps` must answer without errors.

6. Configuring and saving the keys

```
deploy/nova.sh init --domain psa.yourcompany.com --email it@yourcompany.com
```

The script creates `deploy/.env` (readable only by your user), **generates all the passwords and secrets** and creates the key for encrypting the backups in `deploy/secrets/backup.agekey`. If run again, it never changes the values already there.

Straight away, save in the password manager:

```
cat deploy/secrets/backup.agekey          # all of the content, lines with # included
grep '^APP_ENCRYPTION_KEY=' deploy/.env
cat deploy/.env                           # recommended: the whole configuration
```

- Without the **backups' private key** the backups cannot be opened.
- Without **APP_ENCRYPTION_KEY**, after a restore the two-step verification and the mailbox passwords can no longer be read.
- Update the copy every time you change `deploy/.env`. Never send these keys by e-mail or in a chat.

AI (optional): to turn it on, write the key of at least one provider in `deploy/.env` (`ANTHROPIC_API_KEY=`, `OPENAI_API_KEY=` or `GEMINI_API_KEY=`, with no spaces after `=`). It is a good idea to also set a spending limit in the provider's console. You can also do this later: every change to `deploy/.env` is applied with `deploy/nova.sh up`.

7. Starting

```
deploy/nova.sh up
```

The script checks the memory, builds the image (10-15 minutes the first time), starts the database, applies the schema **migrations**, then starts the app, the mail worker and Caddy, and waits for the app to answer.

Checks:

- `deploy/nova.sh status`: app, worker and db **healthy**, caddy **running**, migrate **exited** (normal: it has finished).
- `https://psa.yourcompany.com` shows the padlock and the sign-in page (Company code, E-mail, Password).
- `https://psa.yourcompany.com/api/health` answers `{"status":"ok"}`.

If the HTTPS certificate does not arrive: wait 2-3 minutes; check the DNS and ports 80/443 (also with `sudo deploy/setup-host.sh --firewall-only`); read `deploy/nova.sh logs caddy` (`certificate obtained successfully` means it is fine). After the fix, `deploy/nova.sh up` restarts the request straight away. Too many failed attempts in a row make Let's Encrypt block you for about an hour.

8. Activating the first company

Each company has a **company code** of 3 to 40 characters made of lower-case letters, digits and hyphens:

```
deploy/nova.sh tenant-create --name "Rossi Software Srl" --slug rossi \
  --admin-email anna.rossi@rossisoftware.it --admin-name "Anna Rossi"
```

The command creates the company, the **seven default roles**, the **Assistenza** queue (ticket prefix `TCK`) and the invitation for the first administrator, and prints the **invitation link** (`https://psa.yourcompany.com/invite/...`), valid for 7 days and only once. Send it to the administrator over a secure channel: Orafila does not send it by e-mail.

Useful options:

Option	Effect
<code>--lingua en</code>	Company in English: roles and queue with English names, documents and e-mails to customers in English, interface in English for the administrator
<code>--queue-address assistenza@rossisoftware.it</code>	Address of the queue for the e-mail forwarding gateway (see Integrations)

Option	Effect
<code>--reinvite --slug rossi</code>	A new link for the first administrator, if the previous one has expired or been lost (the old one stops working); with <code>--admin-email</code> it also corrects the address

The administrator opens the link, chooses a password (at least 12 characters), signs in with company code, e-mail and password and turns on two-step verification. From there they carry on with [Getting started with a company](#).

Sample data (optional, for a demo or for training): `deploy/nova.sh sample-data --slug rossi` fills every screen with made-up, recognisable data (ESEMPIO-... codes, @esempio.example addresses, two years of history); `deploy/nova.sh sample-data --slug rossi --remove` removes it without touching the real data. Remove it before working with real customers.

9. Configuring the backups

1. Create an S3-compatible **private bucket** (Oracle Object Storage, DigitalOcean Spaces or another) and an **access key limited** to that bucket. On Oracle, add a retention rule that prevents files from being deleted for 29 days.
2. In `deploy/.env`, fill in `BACKUP_RCLONE_REMOTE` and the `RCLONE_CONFIG_...` lines for your storage (the template `deploy/env.example` has ready-made blocks for Oracle and DigitalOcean).
3. First test backup: `deploy/nova.sh backup` (it creates the backup, **verifies** it by decrypting it and copies it to the bucket). `deploy/nova.sh backups` lists the local and remote backups.
4. Automatic backup every night at 02:30: `deploy/nova.sh install-timer` (check with `systemctl list-timers nova-backup.timer`).
5. Recommended: a check on **Healthchecks.io** (period 1 day, grace 2 hours) with its address in `BACKUP_PING_URL`: if a night's backup does not arrive or fails, you receive an e-mail.

Variable	Default	Meaning
<code>BACKUP_KEEP_LOCAL</code>	7	Backups kept on the server
<code>BACKUP_KEEP_REMOTE_DAYS</code>	30	Days in the bucket (longer than the retention rule)
<code>BACKUP_PING_URL</code>	empty	Monitoring address called after every backup

10. External monitoring and restore test

- Create an HTTPS availability (uptime) check on `https://psa.yourcompany.com/api/health` every 5 minutes, with an e-mail alert: the server cannot warn you if it is off.
- **Test the restore straight away**, not on the day you need it: `deploy/nova.sh restore nova-YYYYMMDDTHMMSSZ.dump.age --yes` (it takes a safety backup first). The complete rebuild on a new server (package, `deploy/.env` and keys from the password manager, restore from the bucket) is described in the providers' guides. See also [Operations and maintenance](#).

11. External database (optional)

PostgreSQL usually runs in a container on the same server. For a **managed database** (high availability, backups and point-in-time recovery from the provider) or a **company PostgreSQL server**:

1. After `deploy/nova.sh init`, copy the provider's CA certificate to `deploy/db-ca.crt`.
2. In `deploy/.env`, fill in:

```
NOVA_DB_HOST=database-server-name
NOVA_DB_PORT=5432          # 25060 on DigitalOcean
NOVA_DB_NAME=nova
NOVA_DB_SSLMODE=verify-full # or verify-ca; other values are refused
NOVA_DB_CA_FILE=./db-ca.crt # empty = public authorities, only with verify-full
```

3. `deploy/nova.sh db-setup`: asks for the credentials of a database administrator (it does not save them) and creates the roles `nova_owner`, `nova_app`, `nova_app_user`, the database and, if the provider allows it, `nova_backup` for backups. The passwords reach the database as SCRAM verifiers, never in clear text.
4. `deploy/nova.sh up`: checks the connection, stops the internal database (its volume is kept) and applies the migrations to the external database.

From then on, backup, restore, updates and tools work on the external database. To move the data of an installation that is already running, take a backup **before** filling in `NOVA_DB_HOST`, then run `db-setup`, `restore` and `up`. All the details, the common problems and the security checklist are in the guide [External database](#) (in Italian).

12. Trial run on a computer (without Docker)

For a technical evaluation or for development, on Linux or macOS with **Node.js 22.18** or later and **PostgreSQL 15** or later:

```
cd orafila
npm install
cp .env.example .env.local          # then fill in the variables (see below)
sudo -u postgres scripts/setup-dev-db.sh # roles nova_owner, nova_app, nova_app_user and database
nova_dev
npm run db:migrate
npm run db:seed                    # demo data: companies "demo" and "altra"
npm run build && npm start          # in another terminal: npm run mail:worker
```

Demo sign-in at <http://localhost:3000>: company `demo`, e-mail `responsabile@demo.example` (administrator), password `Demo-0orafila-2026!`; other roles with `commerciale@`, `amministrazione@`, `magazzino@`, `marco.galli@` (technician), all `@demo.example`. These credentials are public and are valid **only** for the local trial: never use `db:seed` on a real installation.

13. Reference: server configuration (`deploy/.env`)

Variable	Required	Meaning
<code>NOVA_DOMAIN</code>	yes	Domain name, without <code>https://</code>
<code>ACME_EMAIL</code>	yes	E-mail address for the Let's Encrypt certificates
<code>POSTGRES_PASSWORD</code> , <code>NOVA_OWNER_PASSWORD</code> , <code>NOVA_APP_PASSWORD</code>	yes (generated)	Passwords of the database roles; <code>up</code> applies them to the database
<code>APP_ENCRYPTION_KEY</code>	yes (generated)	32 bytes in base64 that encrypt the secrets; on a server that is already running it must never be regenerated
<code>INBOUND_EMAIL_SECRET</code>	yes (generated)	Secret of the e-mail forwarding gateway
<code>ANTHROPIC_API_KEY</code> , <code>OPENAI_API_KEY</code> , <code>GEMINI_API_KEY</code>	no	Keys of the AI providers; one is enough

Variable	Required	Meaning
NOVA_AI_MODEL	no	Default agent for the companies that do not choose one (for example <code>claude-sonnet-5-5</code> ; empty = Claude Opus 5.5)
MAIL_POLL_SECONDS	no (60)	How often, in seconds, the mailboxes are read (10 or more)
BACKUP_AGE_RECIPIENT	yes (generated)	Public key for encrypting the backups
BACKUP_KEEP_LOCAL, BACKUP_KEEP_REMOTE_DAYS, BACKUP_RCLONE_REMOTE, BACKUP_PING_URL, RCLONE_CONFIG_*	no	Retention and copying of the backups
NOVA_DB_HOST, NOVA_DB_PORT, NOVA_DB_NAME, NOVA_DB_SSLMODE, NOVA_DB_CA_FILE, NOVA_BACKUP_PASSWORD, NOVA_DB_CLIENT_IMAGE	no	External database

Format: one `KEY=value` line, with no spaces around `=`, comments on their own lines; a value containing `$` goes in single quotes.

For an installation without the package (a local run or another platform) the app reads: `DATABASE_URL` (application role, subject to the isolation), `ADMIN_DATABASE_URL` (owner, only for migrations and tools), `APP_ENCRYPTION_KEY`, `INBOUND_EMAIL_SECRET`, `APP_BASE_URL` (public address for the invitation links), `TRUST_PROXY=1` only behind a proxy that sets `X-Forwarded-For`, the AI keys and, with a database using TLS, `?sslmode=verify-full&sslrootcert=/path/to/ca.crt` in the address plus `NOVA_DB_REQUIRE_VERIFIED_TLS=1`.

14. Reference: `deploy/nova.sh` commands

Command	What it does
<code>init [--domain D] [--email E]</code>	Creates <code>.env</code> with new secrets and the backup key (does not change the values already there)
<code>db-setup</code>	Only with an external database: creates roles and database with the credentials of an administrator, which are not saved
<code>up</code>	Builds the image and starts or restarts everything
<code>install-timer</code>	Turns on the automatic backup every night at 02:30
<code>status</code>	Services, external database, disk, memory, last backup, outgoing e-mails
<code>logs [-f] [service...]</code>	Logs of <code>app</code> , <code>worker</code> , <code>db</code> , <code>caddy</code> , <code>migrate</code>
<code>version</code>	Installed version and latest available version
<code>update [--no-backup] [--version V]</code>	Downloads the new version from the release server and checks its signature, takes a backup and restarts (<code>--version</code> for a specific version)
<code>tenant-create ...</code>	Activates a company and prints the invitation link
<code>queue-address ...</code>	Assigns or removes the address of a queue for the forwarding gateway
<code>sample-data --slug CODE [--remove]</code>	Adds or removes a company's sample data
<code>backup</code>	An encrypted backup now, plus the remote copy if configured
<code>backups</code>	Lists the local and remote backups
<code>restore FILE --yes [--key K] [--no-safety-backup]</code>	Restores a backup, after a safety backup (<code>--no-safety-backup</code> only with an external database that <code>nova.sh</code> cannot back up, after a copy from the provider)

Command	What it does
<code>help</code>	List of commands

Never use `docker compose down -v`, `docker volume rm` or `docker system prune --volumes`: **they delete the database.**

Getting started

For whom: Company administrators

This document takes a company's administrator from the first sign-in to the first working day. Names in “...” are those of buttons and fields; the full procedures are in the [user manual](#). On every page the “Help with this page” button shows what is missing and how to fix it, and the **numbers next to the menu items** go down to zero as the configuration is completed.

Step 1. First sign-in (10 minutes)

1. Open the **invitation link** you received (valid for 7 days and once only), choose the “New password” (at least 12 characters) and press “Set password”.
2. Sign in with the **company code**, e-mail and password.
3. Turn on **two-step verification**: install an authenticator app on your phone, press “Show the QR code”, scan it and enter the 6-digit code.
4. To change the language of your interface, press the language button at the bottom of the side menu (**English** or **Italiano**).

Step 2. Company details (30 minutes)

Settings › Document details: company name, VAT number (or codice fiscale (tax code)) and address with the city are **required to issue invoices**; then postcode, province, e-mail, PEC (certified e-mail), phone, IBAN and bank (printed on invoices to be paid by bank transfer), payment days suggested on new invoices, invoice footer notes (share capital, REA (business register number), tax regime) and the **document language**. The preview on the right shows the letterhead.

Settings › Company:

Setting	Default	To decide
Hourly rate	€60	The list rate for support time
Round up to every	15 minutes	The smallest unit charged
Minimum charge per job	15 minutes	The minimum charged for each time entry
Also charge travel time	no	Whether travel is deducted from the hour bank
Service times (first response / resolution, working hours)	Urgent 0.5 / 4 · High 2 / 16 · Normal 8 / 40 · Low 16 / 80	The commitments made to customers
Ticket categories	Software error, Installation, Configuration, Training, Data and printouts, Sales enquiry	Your categories, one per line
Days to reopen a closed ticket	15	After that, a new ticket is opened
Company holidays	none (national holidays are already included)	Patron saint's day and company closures, one date per line
Use the AI assistant	on	Whether to use AI

The working hours used for service times and for holidays are Monday to Friday, 9:00-13:00 and 14:00-18:00, Italian time (see [Specifics and limitations](#)).

Step 3. People and roles (30 minutes)

1. **Settings > Roles:** check the seven default roles and, if needed, create your own (see [Roles and permissions](#)).
2. **Settings > Users > Invite a user:** name, e-mail, at least one role and language; press “Invite the user”, then “Copy link” and send it to the person through a secure channel.
3. Only people with a role that **works on tickets** appear among the agents that tickets can be assigned to. On each agent's page, in the **Skills** panel, select the ticket categories they handle and press “Save skills”: AI triage uses them to suggest who to assign tickets to.
4. Recommended: at least **two administrators**, so that one can unlock or reset the other's access.

Step 4. Support mail (30-60 minutes)

Settings > Queues and mail: the company starts with the **Support** queue (Assistenza in a company set up in Italian), with tickets numbered TCK-1, TCK-2... You can add other queues with their own prefix (1 to 5 letters) and choose for each one the **acknowledgement of receipt** to the customer.

For each queue, connect a **dedicated mailbox** (for example `support@yourcompany.com`):

	Details	Notes
Receiving (IMAP)	Server, port (993 with TLS), user name, password, folder (usually INBOX)	The first read imports the 50 most recent unread e-mails; nothing is deleted from the mailbox
Sending (SMTP)	Server, port (465 with TLS or 587 with STARTTLS), user name, password, sender address and name	If the server blocks the mail ports (for example on DigitalOcean) you need a sending service on port 2525 with STARTTLS

Tick “Mailbox on”, press “Save the mailbox” and then “Test the connection”.

Mail providers:

- **Gmail and Google Workspace:** they work with an **app password** (this needs two-step verification on the Google account; in Workspace the administrator may have turned app passwords off).
- **Microsoft 365:** Microsoft does not accept IMAP reading with a password alone, and OAuth access is not supported yet: forward the queue's mail to a mailbox with another provider and connect that one; sending works only if the tenant allows SMTP AUTH.
- **Mailboxes of Italian hosting providers and other providers** with IMAP/SMTP and a password: they work directly.
- As an alternative to the IMAP mailbox, a **forwarding gateway** can deliver e-mails to the application (see [Integrations](#)).

For e-mails to become tickets by themselves, the sender must be one of the customer's **contacts** or their domain must be among the customer's **“E-mail domains”** (see Step 6).

Step 5. Notifications, e-invoices and AI (20 minutes)

1. **Settings > Notifications:** in “Sending mailbox” choose the queue that sends invoices, order confirmations, receipts, supplier orders and alerts; the “Reorder level” and “Absences” alerts are on from the start: untick them if you do not want them; press “Send a test e-mail”.
2. **Settings > Fatture in Cloud** (if you use it): in Fatture in Cloud create an application with a manual token, connect it with read and write permissions on invoices and read permission on settings, paste the token into “Access token” and press “Connect Fatture in Cloud”. Then choose the company, the sezionale (numbering series) if any (for example `/PSA` if you also issue other invoices in Fatture in Cloud), the **natura** (VAT exemption code, e.g. N2.2) for lines with 0% VAT, the code for the “Other” payment method and whether to create invoices **as soon as they are issued**.

3. **Settings › Artificial intelligence** (if AI is enabled on the server): main agent, any agents per feature, **monthly budget** and, if you want, “Stop the AI when the month's budget is used up”.

Step 6. Starting data

Data	How to load it
Customers	Customers › “Import from CSV”: downloadable template, also from an Excel file saved as CSV; up to 2 MB and 5,000 rows per file; row-by-row preview, then an all-or-nothing import. Or “New customer”
Contacts and e-mail domains	From the import (one contact person per row) or from the customer page › Contacts and sites; the domains in “E-mail domains”
Products installed at customers' premises	Settings › Products for the catalogue, then customer page › Installed products
Contracts	Customer page › “New contract” (automatic renewal, notice period, annual value, adjustment)
Hour banks and ticket allowance	Customer page › “New hour bank” and “Ticket allowance”
Products for sale and stock	Products and stock › “New product”; for goods tracked in stock, an opening stock for each product
Suppliers	Suppliers › “New supplier”
Accounts	Income and expenses › Accounts, with the opening balance and its date
Employees	Employees and absences › “New employee”, linking the “Orafile user” for holiday requests
Calendar groups	Calendar › Groups (for example Technicians, Sales)

Today, import from file covers **customers** (with one contact person each); the other data is entered from the pages. Larger migrations from another system (past tickets, contracts, hour banks) need a dedicated import, to be agreed.

Invoices: numbering is sequential by year, with no gaps and in date order, and **starts from 1** with the first invoice of the year issued in Orafile (a starting number cannot be chosen from the interface). If you have already issued invoices this year with another program, decide before the first issue how to continue: for example a **dedicated sezionale** in Fatture in Cloud (/PSA), or using Orafile for invoicing from the following 1 January.

Step 7. Full test run

- ☐ Send an e-mail to the queue's mailbox from a contact's address: it becomes a ticket within a couple of minutes, and the customer receives the acknowledgement of receipt (if turned on).
- ☐ Reply from the ticket: the reply reaches the customer and their answer comes back into the same ticket.
- ☐ Log time on a ticket of a customer with an hour bank: the hour bank goes down.
- ☐ Create a draft invoice, issue it, download the PDF, send it by e-mail, record a payment.
- ☐ If you use Fatture in Cloud: create the e-invoice and check its number and totals in Fatture in Cloud before sending it to the SDI (Sistema di Interscambio, the Italian e-invoicing exchange).
- ☐ Open the Assistant page: the **Health check** must not report any problems.
- ☐ Each person signs in, turns on two-step verification and sees the sections of their role.

Step 8. Training

- Every page has **“Help with this page”**: what it is for, what to fix and how to do it, step by step.
- The [user manual](#) collects the same guides in a single document (also in [Italian](#)).
- To practise without touching the real data, the operator can add **sample data** to the company and remove it afterwards (see [Installation](#)).

Operations and maintenance

For whom: IT, platform operator

This document is for whoever manages an Orafila installation: checks, updates, backup and restore, incidents, and supporting users. The `deploy/...` commands are typed on the server, from the `orafila` folder.

Who does what

Activity	Managed service	Dedicated installation
Server, operating system, Docker, HTTPS certificates	Provider	Whoever manages the server
Orafila updates	Provider	Whoever manages the server (<code>deploy/nova.sh update</code>)
Backups, restore test, safekeeping of the keys	Provider	Whoever manages the server
External monitoring of the site and the backups	Provider	Whoever manages the server
Activating new companies, queue addresses for the gateway	Provider (platform operator)	Whoever manages the server
AI provider keys	As set out in the contract	Whoever manages the server, with the company's keys
Users, roles, settings, mailboxes, Fatture in Cloud, AI budget	The company's administrators, from the application	The company's administrators, from the application
Unlocking sign-in, resetting two-step verification, new invitations	The company's administrators	The company's administrators

Checks

What	How
Overall status	<code>deploy/nova.sh status</code> : services, external database, disk space, memory, last backup, outgoing e-mail (SMTP ports reachable or blocked)
Service messages	<code>deploy/nova.sh logs app</code> , <code>logs worker</code> (mail), <code>logs caddy</code> (HTTPS), <code>logs db</code> , <code>logs migrate</code> ; with <code>-f</code> in real time
Availability from outside	HTTPS check on <code>/api/health</code> every 5 minutes from an uptime service: it answers <code>{"status": "ok"}</code> if the app and the database are working
Nightly backups	Healthchecks.io (or similar) with <code>BACKUP_PING_URL</code> ; history with <code>journalctl -u nova-backup -n 50</code>
Inside the application	Assistant > Health check and the numbers in the menu: mailboxes that do not read or send, mail worker stopped, e-mails not sent, AI not answering or out of budget

Docker restarts a service that stops by itself; the health checks of the app (every 30 seconds) and of the mail worker (a signal every 15 seconds) mark it as "unhealthy" if it does not respond.

Updates

Orafile:

```
deploy/nova.sh update
```

The command checks the memory, downloads the new version from the release server and verifies its **digital signature**, takes a **safety backup**, replaces Orafile's files, rebuilds the image and restarts; the **database migrations are applied automatically** at start-up. `deploy/.env`, keys and backups are not touched. It refuses to start if someone has edited Orafile's files on the server by hand (it lists them) and never goes back to an earlier version by itself. `deploy/nova.sh version` tells which version is installed and whether there is a new one. The service is interrupted for a few moments while the containers restart.

Operating system and Docker: security updates are installed automatically every day. If `*** System restart required ***` appears when you log in, restart (`sudo reboot`); after a couple of minutes everything starts again by itself; check with `deploy/nova.sh status`.

Once a month, the base images (database, Caddy, Node.js), which contain security fixes:

```
cd deploy && docker compose pull db caddy && docker compose build --pull && cd ..  
deploy/nova.sh up
```

Disk space: `up` (and therefore `update`) deletes the previous version of the image every time, and the build cache when less than 4 GB is left free. To free space sooner: `docker builder prune -af`.

Never use `docker compose down -v`, `docker volume rm` or `docker system prune --volumes`: **they delete the database.**

Backups

- Automatic every night at **02:30** (Italian time, plus up to 15 random minutes), after `deploy/nova.sh install-timer`; if the server was off, it runs when the server is switched back on.
- By hand at any time: `deploy/nova.sh backup`. List: `deploy/nova.sh backups`.
- Each backup is the complete database (all companies), **encrypted** with age, **verified** and then copied to the bucket if one is configured. The last 7 are kept on the server and 30 days in the bucket (values can be changed).
- The names are the UTC date and time: `nova-20261020T013000Z.dump.age`.
- Backups contain the data; **not the database users**: after a restore on a new server, the database passwords can be new ones.

Safekeeping of the keys (in the password manager, off the server):

1. the backups' private key (`deploy/secrets/backup.agekey`);
2. `APP_ENCRYPTION_KEY`;
3. recommended: the whole `deploy/.env`, updated after every change.

Restore

On the same server (for example to go back to an earlier state):

```
deploy/nova.sh restore nova-YYYYMMDDTHHMMSSZ.dump.age --yes [--key ~/saved-key.txt]
```

The restore first takes a **safety backup** of the current state, stops the app and the mail worker, and loads the backup into a temporary database that replaces the current one only if loading succeeds (with an external database, in a single transaction); it then applies the migrations newer than the backup, restarts and waits for the services to be healthy. If the key does not open the backup, it stops before changing anything. **All the companies** in the installation go back to the state of the backup.

On a new server (server lost or broken):

1. new server, DNS record updated to the new IP, package downloaded, `sudo deploy/setup-host.sh`;
2. the backups' private key put back in `deploy/secrets/backup.agekey` and `deploy/.env` recreated from the password manager (at least `APP_ENCRYPTION_KEY` and the bucket details);
3. `deploy/nova.sh init --domain ... --email ...` to fill in the missing values, then `deploy/nova.sh up`;
4. `deploy/nova.sh backups` and `deploy/nova.sh restore <latest file in the bucket> --yes`: the file is downloaded from the bucket, checked and restored;
5. `deploy/nova.sh install-timer`.

Users sign in with their password and their verification code, as before. If nobody can complete two-step verification, `APP_ENCRYPTION_KEY` is not the one from the original server. The detailed steps are in the guides for Oracle (in Italian) and DigitalOcean (in Italian).

Test the restore when the service starts, with the copy of the key kept in the password manager: a backup that has never been restored guarantees nothing.

If you suspect an intrusion into the server

Consider everything that was on the server compromised: `deploy/.env` (database passwords, bucket and AI keys, `APP_ENCRYPTION_KEY`) and the backup key.

1. **Stop the server** from the provider's console, without deleting it.
2. **Revoke** the bucket access key, the AI providers' keys and, if the server had them, the release access credentials (the Orafile provider revokes them); create new ones.
3. **Rebuild on a new server** with **new** database passwords, gateway secret and backup key (keeping `APP_ENCRYPTION_KEY`, which is needed to read the data) and restore the **last backup from before the intrusion**, opened with the old backup key.
4. **In the application**: change the mailbox passwords (first at the mail provider, then in Queues and mail) and have two-step verification reset for all users (Settings > Users), and their access too if appropriate.
5. Assess with your privacy adviser whether the **breach must be notified** (GDPR Articles 33-34).

Platform operator tasks

What	Command
Activate a company	<code>deploy/nova.sh tenant-create --name "..." --slug code --admin-email ... --admin-name "..." [--lingua en]</code>
New invitation for the first administrator	<code>deploy/nova.sh tenant-create --reinvite --slug code [--admin-email ...]</code>
A queue's address for the forwarding gateway	<code>deploy/nova.sh queue-address --company code --queue Support --address support@customer.com (--clear to remove it)</code>
Sample data	<code>deploy/nova.sh sample-data --slug code / --remove</code>

These operations appear in the company's activity log with "System" as the author.

Supporting users (company administrators)

Situation	What the administrator does in Settings › Users
Locked out after 5 attempts	“Unlock sign-in” (or it unlocks by itself after 15 minutes)
Phone changed or lost	“Reset two-step verification”: the person sets it up again at their next sign-in
Forgotten password	“Reset access”, then “Create a new invitation link”
Invitation expired or lost	“Create a new invitation link” (the previous one stops working)
Person leaving the company	“Suspend the user” (their sessions are closed), then reassign their tickets
Only administrator cannot be reached	The operator's <code>tenant-create --reinvite</code> works only as long as the company has no active administrator; after that, invitations are created from the application. That is why it is best to have at least two administrators ; otherwise the operator has to step in technically

Common problems

Symptom	Likely cause	What to do
The site does not open or the certificate is not valid	DNS not propagated, ports 80/443 closed	Check DNS and firewall, <code>deploy/nova.sh logs caddy</code> , then <code>deploy/nova.sh up</code>
"502" or "Bad Gateway"	The app has not started or is restarting	<code>deploy/nova.sh status</code> , <code>deploy/nova.sh logs app migrate</code>
<code>app</code> or <code>worker</code> "unhealthy"	Database stopped, error in the migrations or wrong configuration	<code>deploy/nova.sh logs app worker db migrate</code> ; once the error is fixed, <code>deploy/nova.sh up</code>
<code>up</code> says a value is missing in <code>deploy/.env</code>	Incomplete configuration	First installation: <code>deploy/nova.sh init</code> ; server already running: put the value back from the password manager (never regenerate <code>APP_ENCRYPTION_KEY</code>)
Customers' e-mails do not become tickets	Mailbox not connected, wrong password, mail provider that requires OAuth, sender not recognised	Queues and mail › “Test the connection”; Inbox; <code>deploy/nova.sh logs worker</code>
Replies are not going out	SMTP details, ports blocked by the server provider	Queues and mail › E-mails not sent; <code>deploy/nova.sh status</code> (outgoing e-mail section); port 2525 with a sending service
The backup does not reach the bucket	Wrong bucket details in <code>deploy/.env</code>	Check endpoint, region, keys and name again; <code>deploy/nova.sh backup</code>
After a restore, two-step verification does not work	Different <code>APP_ENCRYPTION_KEY</code>	Put the saved key back, <code>deploy/nova.sh up</code>
<code>update</code> refuses to start	Orfila files edited by hand (it lists them)	Save the useful changes elsewhere, delete the listed files (the update puts them back as in the package) and try again
The installer or <code>update</code> report that the signature does not match	Package not from the provider, or altered	Install nothing and tell the Orfila provider
Disk almost full	Build cache, old images, too many local backups	<code>docker builder prune -af</code> , <code>docker image prune -f</code> , reduce <code>BACKUP_KEEP_LOCAL</code>

Symptom	Likely cause	What to do
The build stops because of memory	Server with little RAM	<code>sudo deploy/setup-host.sh --swap-only</code> , or a bigger server

Integrations

For whom: IT

Integration	Direction	What it is for	Required
IMAP/SMTP mailboxes	Inbound and outbound	Customers' e-mails that become tickets; outgoing replies, confirmations, documents and alerts	No, but it is the heart of the helpdesk
Forwarding gateway (HTTP)	Inbound	Alternative to IMAP mailboxes for receiving e-mails	No
Fatture in Cloud	Outbound	E-invoice and sending to the SDI (Sistema di Interscambio, the Italian e-invoicing exchange)	No
AI providers (Anthropic, OpenAI, Google)	Outbound	Triage, drafts, briefings, assistant	No
CSV files	Inbound and outbound	Customer import; exports of income and expenses and of reports	No
S3-compatible storage	Outbound	Copy of the encrypted backups	Recommended
Couriers	Link	Shipment tracking from the link saved in the order	No

1. Mailboxes (IMAP and SMTP)

Each support queue can have its own mailbox, set up by an administrator in **Settings > Queues and mail**.

- **Reading (IMAP):** port 993 with TLS (or 143 with STARTTLS), folder of your choice (usually INBOX). The mail worker reads the mailboxes every minute (`MAIL_POLL_SECONDS`, 10 seconds or more), imports the new messages and marks them as read: **it does not move or delete anything**. The first time, it imports only the 50 most recent unread e-mails. Two queues cannot read the same mailbox and folder.
- **Sending (SMTP):** port 465 with TLS or 587 with STARTTLS; if the server provider blocks the mail ports (DigitalOcean blocks 25, 465 and 587), use a sending service on port **2525 with STARTTLS** (for example Mailgun EU, Mailjet, SMTP2GO EU) or on ports 2587/2465 (Amazon SES, Resend, Scaleway).
- **Authentication:** user name and password, stored encrypted. A password is valid only for the server, port and user it was entered with: if you change them, it must be entered again.
- **Test the connection:** checks reading and sending and warns if the server provider may block the SMTP ports.
- **Gmail and Google Workspace:** with an app password. **Microsoft 365:** Microsoft does not accept reading with a password alone and OAuth access is not available yet (forward the mail to another mailbox); sending works if the tenant allows SMTP AUTH.
- **Security:** encrypted connections only; no connections to private or internal network addresses; new sending attempts after 1, 5, 15 and 60 minutes; headers that prevent automatic replies; no reply loops between systems.
- **What is imported:** sender, subject, text (also converted from HTML) and message identifiers. **Attachments are not imported:** the ticket shows their names. For very large messages, only the first part of the text is imported.

2. E-mail forwarding gateway (HTTP API)

An e-mail receiving service (for example an "inbound parsing" service) can deliver each e-mail to Orafila with an HTTP request, instead of IMAP reading.

Request

```
POST https://psa.yourcompany.com/api/inbound-email
Content-Type: application/json
x-nova-inbound-secret: <value of INBOUND_EMAIL_SECRET on the server>
```

```
{
  "to": "assistenza@cliente.it",
  "from": "mario.rossi@azienda-cliente.it",
  "subject": "Error printing invoices",
  "text": "Good morning, since this morning...",
  "messageId": "<CAF1234@mail.azienda-cliente.it>",
  "receivedAt": "2026-10-27T09:15:00Z",
  "headers": { "In-Reply-To": "<...>", "References": "<...>", "Auto-Submitted": "no" }
}
```

Field	Required	Notes
to	yes	The address of the receiving queue; it must be assigned by the operator with <code>deploy/nova.sh queue-address</code>
from	yes	The sender, without a display name
subject	no	500 characters at most
text	no	Plain text, 200,000 characters at most
messageId	yes	Unique identifier of the message: e-mails received twice are recognised
receivedAt	no	Date and time in ISO 8601
headers	no	Only <code>Auto-Submitted</code> , <code>X-Autoreply</code> , <code>Precedence</code> , <code>List-Id</code> , <code>List-Unsubscribe</code> , <code>In-Reply-To</code> , <code>References</code> are used; the others are ignored

Responses

Status	Body	Meaning
200	<code>{"outcome": "create", "ticketNumber": 1042}</code>	New ticket
200	<code>{"outcome": "append", "ticketNumber": 1042}</code>	Added to an existing ticket
200	<code>{"outcome": "triage"}</code>	Sender not recognised: in Inbox
200	<code>{"outcome": "ignore"}</code>	Automatic reply or bulk e-mail (<code>Precedence: bulk</code> , <code>list</code> or <code>junk</code>), discarded
200	<code>{"outcome": "duplicate"}</code> or <code>{"outcome": "stored"}</code>	Already received, or saved and waiting to be sorted
400	<code>{"error": "...", "message": "..."} </code>	Invalid body or data (stable codes, for example <code>invalid_json</code> , <code>invalid_body</code> , <code>invalid_from</code> , <code>invalid_message_id</code>)
401	<code>{"error": "unauthorized"}</code>	Secret missing or wrong
404	<code>{"error": "unknown_address"}</code>	No queue receives at that address
413	<code>{"error": "payload_too_large"}</code>	Request over 2 MB
500	<code>{"error": "internal_error"}</code>	The e-mail was not saved: the gateway must try again later
503	<code>{"error": "not_configured"}</code>	The server has no <code>INBOUND_EMAIL_SECRET</code>

The e-mail is saved **before** it is sorted; error messages are in Italian or English according to the `Accept-Language` header. The gateway only handles receiving; for replies the queue still needs an SMTP mailbox.

3. Fatture in Cloud (e-invoice and SDI)

- **Connection:** manual token of an application created in the Fatture in Cloud developer area, with **read and write permissions on invoices** and **read permission on settings**. The token is stored encrypted and never goes back to the browser or into the activity log; calls go only to the official API (`api-v2.fattureincloud.it`).
- **Creation:** each invoice issued in Orafila becomes an e-invoice in Fatture in Cloud with **the same number**, the same customer details (SDI recipient code and PEC (certified e-mail) included) and the same lines; optionally, automatically on issue. First Orafila checks that Fatture in Cloud works out the **same totals**; if they do not match, the invoice is not created. An invoice is "reserved" before it is created, so two clicks do not create two documents.
- **Sending to the SDI** with the check of the XML file; **status** (delivered, in the cassetto fiscale (online tax area), discarded with the reason) refreshed on request; **sending again** a discarded invoice with the same number after it has been corrected in Fatture in Cloud.
- **Options:** company in Fatture in Cloud, sezionale (numbering series), natura (VAT exemption code, e.g. N2.2) for lines with 0% VAT (required if there are any), payment code for the "Other" method.
- **Limits:** credit notes are issued in Fatture in Cloud; Orafila does not edit or delete documents already created there. The same numbering must not be used for invoices created by hand in Fatture in Cloud.
- **Without Fatture in Cloud** the e-invoice is sent through your own intermediary or management software, starting from the details of the invoice issued in Orafila (currently without export of the FatturaPA XML file).

4. Artificial intelligence providers

- **Anthropic** (Claude) through the official SDK, **OpenAI** (GPT) through the Responses API, **Google** (Gemini) through the `generateContent` API.
- One key per provider in the server configuration; each company chooses its agent and budget from the application. Details, costs and data sent in [Artificial intelligence](#).

5. CSV files

File	Where	Format
Customer import	Customers › "Import from CSV"	Downloadable template; also the CSV exported from Excel (semicolon, comma or tab separator; UTF-8, UTF-16 or Windows-1252 encoding, recognised automatically); up to 2 MB and 5,000 rows; columns: Code, Company name (required), VAT number, Tax code, PEC, E-mail domains, Contact person, Contact e-mail, Phone, Job title, Address, City, Province, Postcode. The most common column names in Italian and English are also recognised
Income and expenses	Income and expenses › "Export to CSV"	Entries for the chosen period, ready for Excel and for your accountant
Reports	Reports › "Download the data (CSV)" in each section	Values by month and the year's rankings; comma as separator, full stop for decimals, amounts in euros without the symbol

6. PDF documents and printing

- PDFs of **invoices**, **receipts**, **customer orders** (order confirmation) and **supplier orders**, generated by the application without external services, with the company's letterhead and in the document language.

- **Print** pages for invoices and receipts.
- The invoice PDF is the **courtesy copy** and says so at the bottom; with bank transfer it shows the IBAN and the payment reference.

7. Not yet available

- **OAuth** access to Microsoft 365 and Google mailboxes.
- **Single sign-on** (Microsoft 365 / Google) for users.
- **Public APIs** and **webhooks** for other systems (apart from the e-mail receiving endpoint).
- **FatturaPA XML** export for intermediaries other than Fatture in Cloud.
- **iCalendar** export of the calendar for Outlook and Google Calendar.
- Connectors with management software and ERP systems.

Specifics and limitations

For whom: Everyone, before choosing

This document collects the Orafile rules that are worth knowing before adopting it, the intended behaviours that may surprise you and the limitations of the current version.

Intended rules (they are not errors)

Sign-in

- **Two-step verification is mandatory** for everyone, with no exceptions and no "trusted" networks.
- **No password recovery by e-mail**: an administrator does it (resets access and creates a new invitation). **Invitations** are not sent by e-mail: the link is copied and sent through a secure channel.
- A session lasts **12 hours**; after that you need to sign in again.
- The company must always have **at least one active administrator**; it is best to have two.

Tax documents

- Invoices have **numbering by year with no gaps**, assigned on **issue** (drafts have no number) and **in date order**: an invoice cannot have a date earlier than the last one issued in the same year, nor a future date.
- An issued invoice **can no longer be edited**: if it is wrong, it is cancelled (if it has no payments) and a new one is made; the cancelled number remains used.
- The **PDF is the courtesy copy**: the invoice with tax value is the e-invoice sent to the SDI (Sistema di Interscambio, the Italian e-invoicing exchange).
- **Payments** cannot be deleted: they are cancelled with the reason, and the receipt stays on record as cancelled.
- The **customer's** billing details are fixed on issue; **your company's** details in PDFs and printouts, on the other hand, are those saved in Document details at that moment, also for invoices already issued (the e-invoice already sent does not change).
- Confirmed orders (customers) or sent orders (suppliers) can no longer be edited; they are cancelled with the reason.

History that cannot be deleted

- **Time worked** on tickets and **hour bank** and **stock** movements cannot be edited or deleted: a mistake is corrected with an opposite movement.
- Products, suppliers and accounts already used in documents or movements cannot be deleted: they are **deactivated**; employees with recorded absences stay, with the end date of their employment; **customers, users, tickets and received e-mails** cannot be deleted from the interface (users are suspended).
- The **activity log** cannot be edited or deleted.

Mail

- E-mails are never deleted from the mailbox: Orafile marks them as read. Automatic replies and bulk e-mails marked as such (**Precedence: bulk** or **list**) are discarded; a newsletter without this marking, from a customer's domain, opens a ticket. E-mails it cannot link stay in Inbox, never lost.
- Free e-mail and PEC (certified e-mail) domains (gmail.com, libero.it, pec.it...) **never identify a customer**: for those senders you need a contact with the exact address. An address or domain registered on two customers is not assigned automatically.
- A ticket's resolution time **stops only** in the "Waiting for customer" status, not in "Waiting for third party".

AI

- The AI does not send anything or change data by itself: the only thing it saves is the triage suggestion on the ticket, as a suggestion; the assistant does not change data. The costs shown are **estimates** based on list prices, in dollars.

Accounting

- Basic accounting and the VAT summary are **indicative**: they do not take into account split payment, reverse charge, pro-rata, advance payments and credits from previous years, and they do not replace your accountant.
- Reports and accounting count only invoices **issued in Orafila**.

Italian specifics

- Working calendar with the **national holidays** (New Year's Day, Epiphany, Easter Monday, Liberation Day 25 April, Labour Day 1 May, Republic Day 2 June, Assumption 15 August, All Saints' Day, St Francis 4 October from 2026, Immaculate Conception, Christmas Day, St Stephen's Day) plus the company closures (patron saint's day included) set by the company.
- Check digit validation of the Italian **VAT number** and of the **IBAN; codice fiscale (tax code), PEC, SDI recipient code** (7 characters, 6 for public administration; without one, 00000000).
- **VAT by rate** on the total of each rate, commercial rounding, **natura** (VAT exemption code, e.g. N2.2) for 0% VAT on the e-invoice.
- Contracts with **automatic renewal, cancellation notice period** and **ISTAT adjustment (Italian inflation index)**.
- Amounts and dates in Italian format (1.234,56 €, 27 ott 2026) or English format (€1,234.56, 27 Oct 2026), according to each person's language.

Limitations of the current version

Area	Limitation	Alternative today
Working hours	Fixed: Monday to Friday, 9:00-13:00 and 14:00-18:00, Rome time zone; cannot be changed from the interface	Closures and the patron saint's day are set in Settings › Company
E-mail attachments	Not imported into tickets (the ticket shows their names); files cannot be attached to replies	Exchange files through other channels
Microsoft 365 and Google mailboxes	Access only with user name and password, no OAuth: Microsoft 365 cannot be read, Google needs an app password	Forward the mail to another mailbox, or use the forwarding gateway
Invitations	Not sent by e-mail	Link to copy and pass on
Sign-in	No single sign-on (Microsoft 365, Google)	E-mail, password and two-step verification
Customer portal	Not available: end customers do not sign in to Orafila	E-mails and acknowledgements of receipt with the ticket number
E-invoice	Only through Fatture in Cloud; no credit notes or FatturaPA XML files from Orafila	Credit notes and other intermediaries outside Orafila
Invoice numbering	Starts from 1 every year, with no choice of the starting number	Dedicated sezionale (numbering series) in Fatture in Cloud
Import	From file, customers only (with one contact person per row)	Entry from the pages; dedicated imports to be agreed
Data export	CSV of income and expenses and of reports; no full export of a company from the interface	On request, carried out by the operator
Retention	No automatic deletion of old data when it expires	On request of the data controller

Area	Limitation	Alternative today
Knowledge base	Used by reply drafts, but with no pages to manage the articles	—
Calendar	No weekly view by time, recurring events, participants, reminders or iCalendar export	Month view and list view
Projects, visit reports, quotes, update plan	Calculation rules ready, pages not yet available	—
Dashboards	Cannot be customised per person	A single dashboard that adapts to the role
Languages	Italian and English	—
API	No public API or webhooks, apart from receiving e-mails	CSV exports

Planned

The planned developments, in indicative order and with no commitment on dates:

- OAuth access to Microsoft 365 and Google mailboxes; sending invitations by e-mail;
- credit notes (also to Fatture in Cloud) and FatturaPA XML export;
- calendar with weekly view, recurring events, participants, reminders and iCalendar export;
- customer portal to open and follow tickets;
- monthly report of hours recovered;
- projects and visit reports (also from notes or a voice message), acceptance test report, quotes with approvals and online acceptance, update plan;
- natural-language search of customers' history, knowledge base generated from resolved tickets;
- single sign-on, public APIs and webhooks, connectors with management software; other languages (German).

Frequently asked questions

For whom: Everyone

Product

Who is Orafila for? Companies that sell, install and support software: software houses, resellers and partners of business management software, system integrators, MSPs, with 5 to 150 employees. It covers support, customers and contracts, sales and invoices, purchasing and stock, basic accounting and people.

Do we need to install anything on our computers? No. Orafila is used from the browser (recent versions of Chrome, Edge, Firefox, Safari), also from tablets and phones. You only need an authenticator app on your phone for two-step verification.

Is it in English? Yes, and in Italian too: everyone chooses their own language; documents and e-mails to customers and suppliers go out in the document language chosen by the company.

Can we try it first? Yes: a company can be activated with realistic **sample data** (two years of history) that fills every screen and is removed with a command without touching the real data.

Does it replace our accounting software? No. Orafila issues invoices, records payments and expenses and gives a financial overview and an indicative VAT figure, but the official accounts stay with your accountant or your accounting software. The CSV exports help pass the data on.

Can we use it for support only? Yes. Modules appear to the people who have the permissions to use them: with the support roles you see only tickets, inbox, customers and calendar.

Support and mail

How do customers' e-mails become tickets? Each queue reads its mailbox (IMAP) every minute. If the sender is one of the customer's contacts or their domain is registered on the customer page, the e-mail opens a ticket or is added to the right one; the others stay in Inbox, to be sorted. Automatic replies and bulk e-mails marked as such are discarded.

Does it work with Microsoft 365 or Gmail? Gmail and Google Workspace yes, with an app password. Microsoft 365 not for reading, today (Microsoft does not accept the password alone and OAuth access is not available yet): forward the queue's mail to another mailbox, or use a forwarding gateway. The mailboxes of the main Italian hosting providers work directly.

Do e-mail attachments reach the ticket? No, today the ticket shows only the names of the attached files; the files stay in the mailbox.

How are service times calculated? In working hours (Monday-Friday, 9:00-13:00 and 14:00-18:00) excluding national holidays and company closures, with first response and resolution targets by priority; the resolution time stops when the ticket is waiting for the customer.

How does the hour bank work? Chargeable time logged on a ticket is deducted from the customer's valid hour bank that expires first, with the company's rounding and minimum charge per job. Top-ups and corrections stay in the history; the system warns when an hour bank is running out and forecasts the date.

Invoices

Are the invoices valid for tax purposes? The invoice with tax value is the e-invoice sent to the SDI (Sistema di Interscambio, the Italian e-invoicing exchange). Orafila creates it in **Fatture in Cloud** with the same number and sends it to the SDI, following its status; the Orafila PDF is the courtesy copy. Without Fatture in Cloud, the e-invoice

is sent through your own intermediary.

Can we issue credit notes? Not from Orafila, today: they are issued in the e-invoicing software (for example Fatture in Cloud), and in Orafila the invoice is cancelled.

Can we continue the numbering already started this year? Orafila's numbering starts from 1 every year. If you have already invoiced this year with another program, use a dedicated sezionale (numbering series) in Fatture in Cloud, or switch to Orafila from 1 January.

Can we correct an issued invoice? No: an issued invoice cannot be edited. It is cancelled (if it has no payments) and a new one is issued; for an e-invoice already sent, a credit note is needed.

Artificial intelligence

Is AI mandatory? No. Without an API key or with AI turned off, Orafila works in full; the guides and the health check remain available.

Can the AI send e-mails or change data by itself? No. The AI suggests (triage, drafts, briefings, the assistant's answers) and people decide: the only thing it saves by itself is the triage suggestion on the ticket, which remains a suggestion until an agent applies it. The assistant reads only the data that the person's role can see.

Which AI does it use? How much does it cost? Claude (Anthropic), GPT (OpenAI) or Gemini (Google), as each company chooses, even a different one for each feature. You pay the AI provider for what you use; Orafila shows the estimated spend for the month and can stop the AI when a monthly budget is reached.

What data goes to the AI provider? Only the data needed by the feature in use (for example the text of the e-mail and the categories for triage), never passwords or secrets. The full list is in [Artificial intelligence](#).

Security and privacy

Is our data kept separate from other companies' data? Yes, by the database itself: every table has forced Row-Level Security rules, verified by automated tests; the application stops if its database role could bypass them.

How is sign-in protected? Passwords of at least 12 characters, mandatory two-step verification, lock after 5 attempts, 12-hour sessions that each person can close, a record of every sign-in.

Where is the data? In the server region chosen at installation; the installations described in the guides use European Union regions (Milan, Frankfurt, Amsterdam).

Are there backups? Yes: every night a full encrypted backup, verified and copied to external storage; 7 copies on the server and 30 days in the external storage. Restoring takes one command. See [Security and privacy](#).

Who can see what? The roles decide: 23 permissions in 7 default roles, which can be changed, plus your own roles. See [Roles and permissions](#).

Is there an activity log? Yes, administrators can consult it; it cannot be edited and contains no secrets.

Installation and operations

Where is it installed? On an Ubuntu Linux server with Docker: Oracle Cloud, DigitalOcean, any VPS or a company server. Or as a service managed by the provider. See [Installation](#).

How long does installation take? About 2-3 hours the first time, almost all of it waiting, following the guides step by step.

Can we use our own PostgreSQL database? Yes, PostgreSQL 15 or later with TLS, including a database managed by the cloud provider. See [Installation](#).

How is it updated? With `deploy/nova.sh update`: check of the new version's digital signature, safety backup, new files, automatic database update, restart in a few moments.

Several companies on the same installation? Yes: each company has its own code, its own users, its own settings and its own separate data.

What happens if we lose the server? It is rebuilt on a new server from the package, the configuration and the keys kept in the password manager, and the latest backup is restored from the external storage. See [Operations and maintenance](#).

Can we import the data from the system we use today? Customers yes, from Excel or CSV with a preview and checks. Other data (past tickets, contracts, hour banks) needs a dedicated import, to be agreed.

Glossary

For whom: Everyone

Term	Meaning in Orafila	Italian term
Activity log	The list, which cannot be edited, of who did what and when	Registro attività
Agent	A person who works on tickets	Operatore
AI agent	The artificial intelligence model chosen to answer (for example Claude Sonnet 5.5)	Agente AI
Assistant	The feature that explains how to use Orafila and looks into the modules to understand what is wrong; available on every page with “Help with this page”	Assistente
Automatic renewal	The contract renews by itself when it expires unless a cancellation arrives within the notice period	Rinnovo tacito
Cancellation	The customer's notice that they will not renew a contract; it takes effect at the end of the period, according to the notice period	Disdetta
Company (company code)	An organisation that uses Orafila, with its own users and separate data; the code (3 to 40 characters) is entered at sign-in	Azienda (codice azienda)
Courtesy copy	The PDF of an invoice: the tax invoice is the e-invoice sent to the SDI	Copia di cortesia
Customer health	A score from 0 to 100 with risks and opportunities: Healthy, Needs attention, At risk	Salute del cliente
Dashboard	The home page, with what there is to do today	Cruscotto
Draft	A document (order, invoice) not yet confirmed or issued: it can be edited and deleted freely	Bozza
Fatture in Cloud	Online service used by Orafila to create the e-invoice and send it to the SDI	Fatture in Cloud
Forwarding gateway	External service that delivers e-mails to Orafila over HTTP, instead of IMAP reading	Gateway di inoltra
Health check	The automatic checks that find problems and things to fix in the modules; they give the numbers next to the menu items	Controllo dello stato
Hour bank	A package of support hours bought by the customer, from which chargeable time is deducted	Monte ore
Income and expenses	The register of income and expenses (the Income and expenses page)	Prima nota
Internal note	A ticket message visible only to colleagues, never sent to the customer	Nota interna
Issue	The step that gives an invoice its final number and makes it no longer editable	Emissione
Mail worker	The service that reads the mailboxes and sends the queued e-mails	Processo della posta
Mailbox	The mailbox of a queue, read with IMAP and used to send with SMTP	Casella
natura (exemption code)	The code (for example N2.2) that explains on the e-invoice why a line has no VAT	Natura dell'esenzione
Platform operator	Whoever manages the Orafila server and activates companies	Operatore della piattaforma
Queue	A support channel (for example Support) with its own e-mail address and ticket prefix	Coda
Reorder level	The quantity below which a product should be reordered	Scorta minima
Role	A set of permissions given to people	Ruolo

Term	Meaning in Orafila	Italian term
Row-Level Security	PostgreSQL database rules that show each company only its own rows	Row-Level Security
SDI (Sistema di Interscambio)	The exchange system of the Italian Revenue Agency (Agenzia delle Entrate) for e-invoices	SDI
SDI recipient code	The 7-character SDI code (6 for public administration) to which the SDI delivers the customer's e-invoices	Codice destinatario
Service times (SLA)	The first response and resolution targets by priority, in working hours	SLA / tempi di servizio
sezionale (numbering series)	A separate numbering of invoices in Fatture in Cloud (for example /PSA)	Sezionale
Skills	The ticket categories an agent handles, set on their page in Settings › Users; AI triage uses them to suggest who to assign a ticket to	Competenze
Sorting / triage	Assigning customer, category, priority and agent to an e-mail or a ticket; also with the AI's suggestion	Smistamento
Stock on hand	The quantity of a product in stock, calculated from the movements	Giacenza
Ticket	A support request, numbered with the queue's prefix (for example TCK-1042)	Ticket
Ticket allowance	A customer's annual ticket credits, used up by the weight of each ticket	Contatore ticket
Two-step verification	The 6-digit code from the authenticator app required in addition to the password (TOTP)	Verifica in due passaggi
Weight	How many ticket allowance credits a ticket uses (0 to 50)	Peso