

# User manual

All the procedures step by step and the common problems, module by module.

October 2026

Orafile

Demo Software Srl

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Good morning, Giulia

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To work onSLA at riskSLA breachedWaiting

Open the ticket list

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| Ticket  | Subject and customer                                                                  | Status      | Service times                          |
|---------|---------------------------------------------------------------------------------------|-------------|----------------------------------------|
| TCK-204 | Cedolini del mese non generati: errore "Periodo chiuso"<br>Officine Lario Srl         | In progress | Resolution3 h working time left        |
| TCK-196 | Le ore di straordinario notturno non arrivano alle paghe<br>Officine Lario Srl        | In progress | Resolution7 h 12 min working time left |
| TCK-202 | Contratto collettivo dell'autotrasporto per i nuovi autisti<br>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<br>Cooperativa Agricola Valle Verde     | Low      | 27 Oct, 10:50 |
| TCK-205 | Errore di connessione al database dopo il riavvio del server<br>Logistica Adriatica Spa | Urgent   | 27 Oct, 10:31 |
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# User manual

For whom: People who use Orafila

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This manual is generated from the guides built into the app, the same ones opened with the “Help with this page” button and read by the assistant: the names of pages, buttons and fields are those on the screens.

Everyone sees only the sections and buttons their role allows.

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## Getting started

Signing in, two-step verification, the dashboard and the assistant available on every page.

### 1. Sign-in and two-step verification

**Where to find it:** sign-in page; “Password and sessions” at the bottom of the side menu.

**What it is for.** Signing in to Orafila: company code, e-mail address, password and the two-step verification code, which is required for everyone. On the “Password and sessions” page everyone can change their own password and see which devices they are signed in on.

**Who can use it.** Everyone.

#### How to

##### Signing in

1. On the sign-in page write the “Company code” (your administrator gives it to you), “E-mail” and “Password”; if two-step verification is already on, also the app's “Verification code”.
2. Press “Sign in”. The session lasts 12 hours; “Sign out” at the bottom left ends it.

##### Turning on two-step verification

1. Install an authenticator app on your phone (Google Authenticator, Microsoft Authenticator or similar).
2. Press “Show the QR code” and scan it with the app, or type in the key shown by hand.
3. Enter the “6-digit code shown by the app” and press “Turn on two-step verification”.

##### Accepting an invitation

1. Open the link you received, choose the “New password” (at least 12 characters) and repeat it, then press “Set password” and sign in.

##### Changing your password

1. Open the “Password and sessions” page (address /account/password).
2. In the “Change your password” section write the “Current password” and the “New password” (at least 12 characters), repeat it in “Repeat the new password”, then press “Change password”.
3. Orafila closes the sessions open on your other devices: there you will need the new password and the code again. Two-step verification does not change.

##### Signing out of other devices

1. On the “Password and sessions” page, the “Where you are signed in” section lists the open sessions with device, date, IP address and expiry; yours is marked “This session”.
2. Press “Sign out of all other devices” to close all the others. If you see a device you do not recognise, do this and then change your password.

##### Changing the language

1. To change the language, press the button at the bottom of the side menu: it shows “English” when Orafila is in Italian and “Italiano” when it is in English. Your choice is saved for you and also applies to the e-mail notifications you receive.
2. On the sign-in, invitation and two-step verification pages the same button is at the top right.
3. PDFs and e-mails to customers and suppliers stay in the company's document language, chosen in Settings › Document details.

## Common problems

- **“The company code, e-mail address or password is not correct”**

Check the company code and the e-mail address. For security the message does not say which of the three is wrong, and it is the same for invited or suspended users.

- **“Sign-in is locked for 15 minutes after too many failed attempts”**

After 5 wrong attempts (password or code) sign-in is locked for 15 minutes: try again later or ask an administrator to press “Unlock sign-in”.

- **The two-step verification code is not accepted**

Use the code the app shows now (each one works only once) and check that the time on your phone is right. If you have changed phone, an administrator must reset your verification.

- **The invitation link has expired, has already been used or is not valid**

Links are valid for 7 days and work only once: ask your administrator for a new invitation. If you have already chosen a password but cannot remember it, ask them to reset your access.

- **I have forgotten my password**

Orafila has no automatic recovery: an administrator resets your access and sends you a new invitation link so that you can choose another one.

- **Changing the password says the current password is not correct, or that it is locked**

Enter the password you sign in with today. Every wrong attempt counts as a failed sign-in: after 5, password changes and sign-ins from other devices are locked for 15 minutes, while the session you have open stays valid. If you cannot remember it, ask an administrator to reset your access.

## 2. Dashboard

**Where to find it:** menu › Dashboard (the home page).

**What it is for.** The home page: what needs doing today. It shows the open ticket figures, your tickets sorted by urgency, the ones waiting to be assigned, the customers to follow up and the status of the AI assistant.

**Who can use it.** Everyone. The panels depend on your role: tickets if you may see them, customers if you may see customers, the AI assistant if you may use it.

### How to

#### Reading the dashboard

1. “Open tickets” counts To work on, SLA at risk, SLA breached and Waiting; “Open the ticket list” takes you to the full list.
2. “My tickets” shows the tickets assigned to you, the most urgent at the top, with the service time bar (First response or Resolution).
3. “Unassigned” shows the tickets without an agent: open one and press “Take ticket”.
4. “Customers to follow up” lists the customers whose hour bank or ticket credits are running out, whose cancellation deadline is within 60 days or whose cancellation is to be won back.
5. “In the company today” sums up the business modules your role can see: customer orders that are late or waiting to ship, late supplier orders, overdue invoices and how much is still to collect, products to reorder, absence requests and people who are away; each line links to the page where you can act.
6. “Help with this page”, at the bottom right, opens the assistant: on the dashboard “To check today” lists what the automatic checks found in the modules you can see, with what to do (the first five findings; the link below leads to the others).

#### Logging a phone call

1. Press “New ticket” at the top right (you need the permission to work on tickets) and fill in the form.

## Common problems

- **The dashboard says my role cannot see tickets or customers**

Your user has no support or sales role: ask an administrator to give you a role in Settings › Users.

- **The SLA at risk and SLA breached figures look low**

With a very large number of open tickets the dashboard measures only some of them and says so under the figures; the ticket list sorts them all by urgency.

## 3. AI features

**Where to find it:** menu › Assistant; “Help with this page” button on every page; Settings › Artificial intelligence.

**What it is for.** The AI features: ticket triage, reply drafts, customer briefings and this assistant, which explains how to use Orafila and looks into the modules to understand why something is not working. It is on every page, with the “Help with this page” button, and in the menu, with the number of problems and things to check next to the sections. The company chooses which AI agent answers (Claude by Anthropic, GPT by OpenAI or Gemini by Google) and sees what it spends and how much credit is left. AI suggests, people decide: nothing is saved or sent without a click.

**Who can use it.** The “Help with this page” button, the guides, the health check and the numbers in the menu are for everyone. AI answers and the other AI features need the “uses the AI assistant” permission, the API key of the chosen agent's provider on the server and AI turned on in Settings › Company. Agents, budget and credits are chosen in Settings › Artificial intelligence (administrators).

### How to

#### Asking the assistant

1. Open Assistant from the menu and write your question: how to do something, or what is not working (for example “why did the e-mail from [mario@cliente.it](mailto:mario@cliente.it) not become a ticket?”).
2. The assistant looks only at the modules your role can see, changes nothing and suggests the steps with a link to the page where you take them.
3. If you open the assistant from a page, it knows where you came from: you can ask “why is this ticket overdue?”.

#### Getting help on the page you are on

1. On any page press “Help with this page”, the button at the bottom right: the assistant opens beside the page (over the page on smaller screens, from the bottom on a phone).
2. “What it is for” briefly explains what the section is for. “To check here” lists what the automatic checks found in this section, with what to do and the link to do it; “Check again” runs them again straight away.
3. In “Ask the assistant” press one of the suggested questions (one click is enough) or write your own in your own words. The assistant knows which page you are on and, with AI turned on, reads the ticket, customer, product, order or invoice you are looking at.
4. “How to” and “Common problems” are the section's guide, step by step: open them while you work; on a wide screen the page stays beside them.
5. The panel stays open while you move between pages and updates by itself. “Close” (or the Esc key) closes it without losing the conversation; “Open the assistant full page” takes you to the Assistant page, with the health check and all the guides.

#### The numbers next to the menu items

1. The number next to a menu item (and next to the items inside Settings) counts the problems and things to check that the assistant found in that section: red if there is at least one problem, orange if there are only things to check. Tips are not counted.
2. Open the item and press “Help with this page”: “To check here” says what to do. For Settings open the inner item with the number (for example Users); for Assistant look at “Health check” on its page.

3. The button also counts the findings linked to the page (on invoices, for example, also Document details and E-mail notifications), so it can show a higher number than the menu; on the dashboard it counts everything found in the modules you can see.
4. The numbers update by themselves when you change page, at most once a minute.

### Choosing the AI agent

1. In Settings › Artificial intelligence, under “Main agent”, choose the agent that answers every AI feature: Claude by Anthropic, GPT by OpenAI or Gemini by Google, each in three versions from the most capable to the cheapest, with the price per million tokens. Next to each provider you see whether its key is on the server (“Available”).
2. Under “Agent per feature” you can give the assistant, ticket triage, reply drafts or customer briefings a different agent, for example a cheap one for triage; “Same as the main agent” keeps the main one.
3. Press “Save the AI settings”: the next requests use the chosen agent straight away. Instructions, tools and checks are the same for every agent.

### Reading AI credits and setting a budget

1. In Settings › Artificial intelligence, “AI credits” shows the estimated spend for the month (from the tokens of each request and the list prices, in dollars as the providers bill), the budget, what is left and what the month will cost at this pace.
2. Under “Monthly budget” write the “Budget for the month in dollars”. With “Stop the AI when the month's budget is used up” the AI features go back to manual until the first of the next month; without it, the AI carries on and the health check warns.
3. If you prepay the providers, under “Credit loaded with each provider” write the balance you see in the provider's console and the date: the panel takes off the estimated spend since that day and shows what is left. After a top-up, update amount and date.
4. Beside it you find the month's spend by agent and by feature and the last six months. On the dashboard, in the “AI assistant” box, administrators see the month's spend.

### Health check

1. On the assistant page, “Health check” looks at mailboxes, e-mails to sort, overdue or unassigned tickets, customers to follow up, locked-out users, AI features, stock, late orders, overdue invoices, expenses to pay, absence requests and e-mail notifications. It also works without AI.
2. The same checks give the numbers in the menu and the “To check here” list in the panel of every page.

### Common problems

- **The AI assistant is not set up or is turned off**

Without the API key of the chosen agent's provider the AI features stay off: an administrator chooses an agent marked “Available” in Settings › Artificial intelligence, or whoever manages the server sets the key (ANTHROPIC\_API\_KEY, OPENAI\_API\_KEY or GEMINI\_API\_KEY). If it is turned off for the company, an administrator ticks “Use the AI assistant” in Settings › Company. The guides and the health check work anyway.

- **The AI says the month's budget is used up**

The company chose to stop the AI at its monthly budget and the budget is spent: until the first of the next month work goes on by hand. An administrator can raise the “Budget for the month in dollars”, choose a cheaper agent or untick “Stop the AI when the month's budget is used up” in Settings › Artificial intelligence.

- **The credit shown does not match the provider's console**

It is an estimate: it counts this company's spend since the date written, at list prices. If the same key is also used by other companies or programs, or after a top-up, write balance and date again under “Credit loaded with each provider”.

- **The AI did not give a usable answer**

Try again shortly, or with a more precise question. In the meantime carry on by hand: every AI feature has a manual alternative.

- **I fixed a problem but the number in the menu is still there**

The numbers update when you change page, but at most once a minute: to update them now press “Check again” in the “Help with this page” panel, or reload the page. If the number stays, the problem is still there: read “What to do” in the panel.

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## Customer support

Tickets, inbox, customer records with the 360° view and calendar.

### 4. Tickets

**Where to find it:** menu › Tickets.

**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.

**Who can use it.** To see them: the “sees tickets” permission. To reply, change the status and log time: “works on tickets”. To assign them to a colleague: “assigns tickets”. Internal cost and margin: “sees reports”.

#### How to

##### Finding a ticket

1. Open Tickets. Choose the “View” (To work on, Waiting, Resolved and closed, All), the “Assignee” and the “Priority”, or type part of the subject or the customer's name in “Search”.
2. Press “Apply filters”; “Clear filters” takes you back to the starting list. Open tickets are sorted by urgency: overdue ones first.

##### Logging a request received by phone

1. Press “New ticket”.
2. Choose the “Customer” and, if they are on file, the “Contact” who called.
3. Enter the “Subject” (200 characters at most) and the “Description”: the description becomes the ticket's first message.
4. Choose the “Priority”, “Category” and “Product” and, in “Assign to”, yourself, a colleague (you need the permission to assign) or “Nobody, leave it to be sorted”.
5. Press “Open the ticket”.

##### Taking or assigning a ticket

1. In the ticket details press “Take ticket”: the ticket becomes yours and moves to In progress.
2. For a colleague (you need the permission to assign): choose the agent in “Assign to” and press “Assign the ticket”. A New ticket becomes Open.

##### Replying to the customer or writing an internal note

1. Under “Reply”, write in the “Text” field.
2. “Send the reply to the customer” sends it by e-mail when the queue's mailbox can send; otherwise the button is “Save the reply to the customer” and the reply stays in the history only. The note under the field says which of the two applies.
3. “Add an internal note” saves a note for your colleagues: internal notes are never sent to the customer.

4. With AI turned on you can press “Write a draft with AI”: read the draft through and correct it, then save it with one of the two buttons. The draft on its own is not saved.

### Changing the status

1. Use the buttons under “Status and assignment”: “Start work”, “Stop work”, “Set to waiting for customer”, “Set to waiting for third party”, “Close the ticket”, “Reopen the ticket”.
2. To resolve it, enter the “Solution” (required) and press “Resolve the ticket” or “Resolve and send the solution”: if the mailbox can send, the solution goes out by e-mail.
3. To close a New ticket that was never worked on (spam, duplicate), enter the “Reason for closing” and press “Close without working on it”.
4. Possible changes: New → Open, In progress, Closed; Open → In progress, Waiting for customer, Waiting for third party, Resolved, Closed; In progress → Open, Waiting for customer, Waiting for third party, Resolved; Waiting for customer → In progress, Resolved, Closed; Waiting for third party → In progress, Resolved; Resolved → In progress, Closed; Closed → In progress.

### Logging time worked

1. Under “Time worked”, enter the “Minutes worked” (from 1 to 1440) and the “Travel minutes”.
2. Leave “Billable to the customer” ticked if the time is to be invoiced, then press “Log time”.
3. Billable time is deducted from the customer’s valid hour bank that expires first, rounded according to the company’s rules. Time entries cannot be edited or deleted.

### Changing the weight on the ticket allowance

1. Under “Weight on the ticket allowance”, enter the “Weight” (from 0 to 50): the ticket uses as many credits as its weight.
2. With a weight of 0, enter the “Reason for zero weight” (for example a software bug), then press “Save the weight”.

### Using the triage suggested by AI

1. In the ticket’s “AI assistant” panel press “Analyse with AI”: it suggests category, priority, product, agent (based on the skills set in Settings › Users and each agent’s open tickets), information to ask for and possible duplicates.
2. Check the suggestion and press “Apply the suggestions” if it is right. With low confidence, urgent priority or an unrecognised customer, the panel asks you to check it carefully.

### Common problems

- **I cannot take the ticket or move it to In progress**  
To move to Open or In progress the ticket must have an assignee: press “Take ticket” or assign it first with “Assign the ticket”.
- **I cannot assign the ticket to a colleague**  
You need the “assigns tickets” permission: you can only take it yourself. Ask an administrator or a support manager.
- **My colleague is not in the “Assign to” list**  
Only active users with a role that works on tickets are listed: an administrator must give them a role such as Tecnico (technician) in Settings › Users.
- **I cannot reopen a closed ticket**  
A closed ticket can be reopened only within the number of days set by the company (15 unless changed in Settings › Company): after that, open a new ticket for the same customer.
- **The reply did not reach the customer**  
Read the line under the message: “E-mail being sent”, “E-mail sent” or “Sending failed” with the reason. If the note under the “Text” field says the reply stays in the history, the queue has no mailbox that can send or the

ticket has no e-mail address: an administrator must set up the mailbox in Queues and mail.

- **The ticket went over its service times even though I was waiting for the customer**

The resolution clock stops only in the “Waiting for customer” status (not “Waiting for third party”): put the ticket in that status while you wait. Service times count only the working hours of the company calendar.

- **The time I logged was not deducted from the hour bank**

This happens if the ticket is not linked to a customer, if the customer has no hour bank valid today or if the time is not billable. The line under the time form says which case applies.

- **A resolved ticket cannot be closed or resolved**

To resolve it you need the “Solution”; to close a New ticket you need the “Reason for closing”. If the message says the ticket is now in another status, a colleague has changed it: reload the page.

## 5. Inbox

**Where to find it:** menu › Inbox.

**What it is for.** The e-mails that Orafila cannot link to a customer or a ticket on its own. E-mails from recognised customers (by contact or domain) and replies to a ticket become tickets automatically; the others stay here, to be sorted by hand.

**Who can use it.** To open the page: “sorts the inbox”. To create a ticket choosing the customer: also “works on tickets” and “sees customers”. To add to a ticket: “works on tickets”.

### How to

#### Sorting an e-mail

1. Open Inbox: under “To sort” the e-mails are listed oldest first.
2. For a new ticket choose the “Customer” (the recognised one is already selected) and the “Priority”, then press “Create the ticket”.
3. If it is about an existing ticket, enter the “Ticket number” (for example TCK-1042) and press “Add to the ticket”.
4. If it is not needed (advertising, spam) press “Ignore”. If automatic sorting failed, “Process automatically” appears.

#### Recovering an e-mail ignored by mistake

1. Under “Recently processed” find the row with the outcome Ignored and press “Put back to sort”.

#### Making a customer's e-mails become tickets automatically

1. Register the sender as a contact of the customer with their e-mail address (customer page › Contacts and sites), or add the customer's company domain to “E-mail domains” (customer page › Edit the customer's details).
2. Free webmail or PEC (certified e-mail) domains (gmail.com, libero.it, pec.it and the like) never identify a customer: for those people you need the contact.
3. If the same address or the same domain is registered for two customers, Orafila does not choose and the e-mail stays to be sorted.

#### Common problems

- **A customer's e-mail did not become a ticket**

The sender is not a contact of the customer and their domain is not among the customer's “E-mail domains” (or it is on more than one customer, or it is a free domain): sort it from Inbox and register the contact or the domain. Automatic replies and mailing lists are discarded on purpose.

- **The customer's reply ended up in a new ticket instead of the right one**

A reply goes into the right ticket if the subject contains the reference in square brackets ([TCK-1042]) or if it answers an e-mail sent by Orafila. Otherwise add the e-mail to the ticket with “Add to the ticket” and close the duplicate.

- **No e-mails are coming in**

If Inbox says no mailbox is connected, an administrator must connect the queue's mailbox in Settings › Queues and mail. If the mailbox is connected, the health check says whether it is giving errors or whether the mail process has stopped.

- **I cannot add the e-mail to a closed ticket**

A ticket closed for longer than the days allowed for reopening does not accept e-mails: create a new ticket.

## 6. Customers

**Where to find it:** menu › Customers.

**What it is for.** The customer records with the 360° customer page: customer health, contracts with automatic renewal and cancellations, hour banks, ticket allowance, tickets, installed products, contacts and sites, AI briefing. Many customers can be imported at once from CSV.

**Who can use it.** To see them: “sees customers”. To create, edit and import customers and manage contracts, hour banks, contacts and products: “edits customers”.

### How to

#### Seeing a customer's orders and invoices

1. On the customer page, the “Orders and invoices” section shows the latest orders and invoices with their status, how much has been invoiced this year, how much is still to collect and how much is overdue (visible with the permission to see customer orders or invoices).
2. “New order” and “New invoice” open the form with the customer already chosen; “All the customer's orders” and “All the customer's invoices” open the filtered lists.

#### Creating a customer

1. In Customers press “New customer”.
2. Fill in the “Company name” and, if you have them, the “Customer code”, “VAT number”, “Tax code”, “PEC (certified e-mail)”, “SDI recipient code” (for the e-invoice), “E-mail domains” (one per line), “Account manager” and “Parent company”.
3. Press “Create the customer”. Contacts, sites and installed products are added afterwards from the customer page.

#### Importing customers from Excel or CSV

1. In Customers press “Import from CSV” and download the CSV template.
2. Fill it in (only the “Company name” is required), delete the sample row Example Srl and save it as CSV from your spreadsheet: do not upload the Excel file.
3. Upload the file (2 MB and 5,000 rows at most) and press “Check the file”: the check saves nothing and shows New, Update or Not imported for each row.
4. Press “Import N customers”. The import is all or nothing; rows with errors are skipped: correct them in the file and import it again.
5. An existing customer is updated if it has the same code or the same VAT number; empty cells do not delete any data.

#### Adding contacts and sites

1. From the customer page open “Contacts and sites”.
2. For a contact, fill in “First and last name”, “E-mail” (e-mails from this address open tickets on the customer's behalf), “Phone”, “Job title” and “Contact person for”, then press “Add the contact”.
3. For a site, fill in the “Site name” and the address, then press “Add the site”.

## Recording a contract

1. On the customer page, in the “Contracts” section, press “New contract”.
2. Fill in “Contract number”, “Start date”, “Billing”, “Initial term”, “Automatic renewal”, “Length of each renewal”, “Cancellation notice”, “Annual value” and “Annual adjustment” (for example ISTAT, the Italian inflation index).
3. Press “Save contract”: the contract page shows the current period, the cancellation deadline and the first invoices.

## Recording a cancellation

1. Open the contract (“Edit the contract or record a cancellation”).
2. In the “Cancellation” panel fill in “Received on”, “Reason” and, if you know it, “Moving to”.
3. Press “Calculate when it takes effect”: Orafile shows the last day of the contract based on the notice period. Then press “Confirm and register the cancellation”.
4. While you try to win the customer back, update the “Win-back outcome” (Win-back in progress, Customer won back, Customer lost) and press “Save win-back outcome”.

## Creating, topping up or correcting an hour bank

1. On the customer page, in the “Hour banks” section, press “New hour bank”: fill in “Name”, “Hours purchased” (40, 12.5 or 1:30), the validity dates, “Warning threshold” and, if there is one, the “Linked contract”; then press “Create hour bank”.
2. To add hours, open the hour bank (“Top up or correct the hour bank”), fill in “Top up the hour bank” and press “Add hours”.
3. To deduct hours used outside tickets, use “Correct usage” with the “Reason” and press “Deduct hours”. Movements cannot be deleted: a mistake is corrected with an opposite movement.

## Setting up the ticket allowance for a year

1. From the customer page open “Ticket allowance” (under “Manage the customer”).
2. Fill in “Annual support fee”, “Value of one ticket credit”, any “Extra credits purchased”, the “Warning threshold” and the “Rules” (unlimited tickets, charging beyond the credits).
3. Press “Save the [year] allowance”: the year’s credits are the fee divided by the value of one credit, plus the extras.

## Preparing a customer briefing with AI

1. On the customer page, in the “Customer health” section, press “Prepare the briefing with AI”.
2. The briefing sums up the situation and suggests up to 4 actions, each with the department responsible. It is a suggestion: it is not saved.

## Common problems

### • A customer's e-mails end up in Inbox

Add the company domain to “E-mail domains” or the people as contacts with their e-mail address. A domain on two customers, or an address registered for two customers, is not assigned automatically.

### • The customer shows as At risk

At risk means a cancellation has been received or the score is below 50 out of 100. The “Customer health” section lists the risks with their weight in points (missed SLAs, rising tickets, overdue invoices, no recent contact, cancellation deadline close...). People who may not view tickets or invoices see the same risks with the same weight, but without the number of tickets and without the amount of the overdue invoices.

### • I cannot delete a contact or a site

A contact named on a ticket cannot be deleted: edit it instead, for example by removing the e-mail address. A site with installed products cannot be deleted: move the products first.

- **The CSV import says it is an Excel file or that the name column is missing**

In Excel use Save As with the CSV format, then upload the new file; the required column is called “Company name”. A row with neither code nor VAT number that has the name of an existing customer is skipped, so as not to create duplicates.

- **I cannot top up an expired hour bank**

Movements must fall within the validity period: first extend “Valid until” in “Edit the hour bank”, or create a new hour bank.

## 7. Calendar

**Where to find it:** menu › Calendar.

**What it is for.** The calendar of the whole company and of each group (for example Technicians, Sales), with people's holiday and time off. Each event can be linked to the ticket, invoice or customer it is about and leads straight to its page. Right-click a day to add an event, request holiday or time off, plan a job on a ticket, an invoice due date or an appointment with a customer.

**Who can use it.** Every default role sees the calendar and adds events to it (in roles: “sees the whole company and group calendars” and “adds events to the calendar”, in Settings › Roles). Everyone sees every group's calendar, but writes only in the whole company calendar and in their own groups' calendars; whoever manages settings and users writes in all of them and creates the groups. Holiday and time off: whoever can see employees and absences sees all of them, with the type; everyone else sees their own and, for colleagues, only approved absences as “Away”, without the reason. A link to a ticket, invoice or customer opens only if you can see that module.

### How to

#### Adding an event with a right click

1. Open Calendar from the menu and choose the month with the arrows (or “Today”).
2. Right-click a day: the day's menu opens. From the keyboard or on a phone, press the day's number, which opens the same menu.
3. Choose “New event...” (or the “New event” button above the calendar), enter the “Title” and choose the “Type” and the “Calendar” (“Whole company” or one of your groups).
4. Leave “Start time” and “End time” empty for an all-day event; without “End time” it lasts an hour. For several days fill in “Until”.
5. Press “Add to calendar”: the event appears on the day in the colour of its calendar.

#### Linking a ticket, an invoice or a customer to an event

1. From the day's menu choose “Job on a ticket...”, “Invoice due date...” or “Appointment with a customer...”: the event starts with the right link already chosen.
2. Otherwise, in an event choose a ticket, an invoice or a customer in “Linked to”, then pick it in the “Ticket”, “Invoice” or “Customer” field that appears below.
3. On the calendar a linked event leads straight to the ticket, invoice or customer page with one click; right-clicking the event also offers “Edit or delete the event...”.
4. If the ticket or the invoice does not exist yet, choose “Open a new ticket for this day” or “Prepare a new invoice for this day” from the day's menu: after “Open the ticket” or “Create draft” you are back on the calendar with the new ticket or draft already added on that day, in the “Whole company” calendar.

#### Requesting holiday or time off from the calendar

1. Right-click the day and choose “Holiday...” or “Time off...” (or the “Holiday or time off” button above the calendar).
2. Check “From” and “To”; for a few hours of time off enter the “Hours” and leave “To” empty.

3. Press “Send request”: it goes to whoever manages staff, and on the calendar you see it “awaiting approval” until it is approved or rejected. Your user must be linked to an employee record.
4. Whoever manages employees chooses a colleague in “For” and presses “Record absence”: the absence is approved straight away. For yourself it is always a request.

### Seeing other groups' calendars

1. Above the month, in “Calendars to show”, tick the groups you want to see, including those you do not belong to; the calendar updates at once.
2. At first “Whole company” and your groups are ticked, marked “(your group)”. Your choice is kept for your next visits from this browser.
3. “Holiday and time off” shows or hides the absences of the people of the chosen calendars; “Whole company” shows them for everyone.
4. Moving to another month keeps the same calendars. “List” shows the month as a list, handy on a phone.

### Editing or deleting an event

1. Right-click the event and choose “Edit or delete the event...”; an event without a link also opens with a click, and the “List” view has an “Edit” button.
2. Change the fields and press “Save changes”, or press “Delete event” and confirm: the linked ticket, invoice or customer stays as it is.
3. An event in the calendar of a group you do not belong to, or any event if your role cannot add events to the calendar, opens read-only with “Event details...”.

### Creating groups and choosing their people

1. On the calendar press “Groups” (changing them needs the permission to manage settings and users).
2. In the “New group” panel enter the “Name”, choose the “Calendar colour” and tick the “People in the group”, then press “Create group”.
3. To change a group press “Edit” on its row, then “Save changes”. “Delete group” moves its events to the whole company calendar.

### Common problems

- **The right-click menu has no “Holiday...” and “Time off...”**  
Your user is not linked to an employee record: ask whoever manages staff to link it from Employees and absences, on your record, with the “Orafile user” field.
- **I cannot write in a group's calendar**  
You write only in the whole company calendar and in your own groups' calendars. Ask whoever manages settings and users to add you to the group from Calendar > Groups, or put the event in the “Whole company” calendar.
- **I see “Linked to a ticket” but cannot open it**  
Your role does not see that module (tickets, invoices or customers): you see the event but not the linked activity. Ask an administrator for the permission, if you need it.
- **For a colleague I only see “Away”**  
This is intended: the type of absence (sick leave, for example) is seen only by whoever can see employees and absences, and for colleagues only approved absences appear.
- **Right-clicking opens the browser's menu instead of the calendar's**  
Right-click inside a day's box or on an event, not outside the calendar. On phones and tablets, press the day's number. If the menu never appears, your role can only see the calendar: ask an administrator for the “adds events to the calendar” permission.

# Sales

Customer orders, invoices and receipts, e-invoicing with Fatture in Cloud.

## 8. Customer orders

**Where to find it:** menu › Sales › Customer orders.

**What it is for.** Customer orders from draft to delivery: lines with prices, discounts and VAT, order confirmation as a PDF and by e-mail, shipment with carrier and tracking code (which takes the goods out of stock), delivery and link to the invoice.

**Who can use it.** To see orders and download their PDF: the “sees customer orders” permission. To create, confirm, ship, deliver and cancel them: “manages customer orders”. “Create invoice” only needs “sees customer orders” and “issues invoices and records payments”: “manages customer orders” is not required.

### How to

#### Recording a new order

1. Open Customer orders and press “New order”.
2. Choose the “Customer”, check the “Order date” and, if you have them, enter the “Expected delivery” and the “Customer reference” (the customer’s own order number).
3. In “Shipping address” write where to deliver, or pick one in “Copy the address of a site”.
4. In the “Lines” choose the “Product” (it fills in description, sale price and VAT, which you can change) or leave “Free line, no product”; enter the “Quantity”, “Unit price”, “Discount” and “VAT”. “Add a line” adds another one, “Remove” deletes it. The totals update as you type.
5. Press “Save order draft”: the order gets its ODV-... number and stays a draft, which you can change with “Edit”.

#### Confirming the order and sending the confirmation to the customer

1. Open the order: in the “Confirm order” panel leave “E-mail the order confirmation, with the PDF” ticked and check the “Customer’s address” (suggested from the customer’s administrative contact).
2. Press “Confirm order”. Once confirmed, the order can no longer be changed.
3. If e-mail notifications are not on, the box does not appear and the panel says why: press “Download PDF” and send it by hand.

#### Shipping and sending the tracking details

1. In the confirmed order, in the “Ship” panel, write “Shipped on”, “Carrier”, “Tracking code” and the “Link to track the shipment” (it must start with https://).
2. Leave “Tell the customer by e-mail, with carrier and tracking” ticked to send them the shipment details.
3. Press “Record shipment”: products tracked in stock are taken out of stock. If there is not enough stock, the shipment is not recorded and the page says how much is missing.
4. When the customer has received the goods, write “Delivered on” and press “Mark as delivered”.

#### Invoicing an order

1. In a confirmed, shipped or delivered order press “Create invoice” at the top: the invoice starts with the order’s customer and lines.
2. In the order’s “Summary”, next to “Invoice”, there is the link to the invoice; in the order list the “Invoice” column says whether it has already been invoiced.

#### Cancelling or deleting an order

1. A draft that was never confirmed is deleted with “Delete draft”.
2. A draft or confirmed order is cancelled with “Cancel order”: enter the “Reason for cancelling” and press “Cancel order” again. The reason stays in the “History”.

3. An order already shipped cannot be cancelled; an order already on an invoice can be cancelled only after cancelling the invoice.

### Finding an order

1. In Customer orders type in "Search" the number (ODV-12), the customer reference, the customer's name or the tracking code.
2. Filter by "Status", "Customer" or "Delivery" (Late only) and press "Filter"; "Show all orders" clears the filters.

### Common problems

- **I cannot record the shipment: it says there is not enough stock**  
One of the products tracked in stock does not have enough items: the order page says how many are missing. First record the delivery of the goods from the supplier or correct the stock in Products and stock, then ship.
- **I can no longer change the order lines**  
Lines can be changed only while the order is a draft. If a confirmed order is wrong and has not been shipped yet, cancel it with the reason and create a new one.
- **The order confirmation or the shipping notice did not go out by e-mail**  
E-mails are sent from the mailbox chosen in Settings > Notifications: if there is none, or the mailbox cannot send, the order changes status anyway and the page says so. In the "E-mails to the customer" panel you see each e-mail and any error. Meanwhile you can download the PDF and send it by hand.
- **I cannot see the "Create invoice" button**  
It appears only on confirmed, shipped or delivered orders not yet invoiced, to people who also have the permission to issue invoices. If the order is already on an invoice, you find the link in the "Summary".

## 9. Invoices and receipts

**Where to find it:** menu > Sales > Invoices and receipts.

**What it is for.** Invoices to customers: draft, issue with a sequential number for each year, payments with their receipt, printing, PDF and sending by e-mail, with payment reminders for overdue invoices. The PDF is the courtesy copy: the invoice that counts for tax purposes is the electronic one, sent to the SDI (Sistema di Interscambio, the Italian e-invoicing exchange) through Fatture in Cloud (if connected in Settings > Fatture in Cloud) or through your intermediary or accounting software.

**Who can use it.** Invoices and receipts can be seen by people with the "sees invoices and receipts" permission (the Commerciale role too); people with "issues invoices and records payments" (the Amministratore and Amministrazione roles) create and issue them, record payments, cancel them and send them by e-mail.

### How to

#### Creating an invoice

1. Open Invoices and receipts and press "New invoice".
2. Choose the Customer: Bill to, VAT number, Tax code, Address, PEC (certified e-mail) and SDI recipient code are filled in from the customer's record (the address of the first site) and can be corrected for this invoice.
3. Check the Invoice date, the Payment due date (suggested from the days set in Settings > Document details) and the Payment method; the Notes are printed on the invoice.
4. In the Lines choose a product (it fills in description, price and VAT) or leave "Free line, no product", then Quantity, Unit price, Discount and VAT; "Add a line" adds more. The totals update as you type.
5. Press "Create draft". While it is a draft you change it with "Edit draft" or delete it with "Delete draft".

#### Invoicing a customer order

1. Open the order in Customer orders: it must be confirmed, shipped or delivered.
2. Press "Create invoice": New invoice opens with the order's customer and lines, which you can still change.

3. Press "Create draft". An order is invoiced only once: if it already has an invoice, the page takes you to it.

### Issuing the invoice

1. Open the draft and, in the Issue panel, press "Issue invoice"; confirm with "Yes, issue the invoice". The question shows the number it will get.
2. 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.
3. The date cannot be in the future or earlier than the last invoice issued in the same year, because the numbering follows the order of the dates.
4. Then send the e-invoice to the SDI: with Fatture in Cloud connected, in the "E-invoice" panel press "Create in Fatture in Cloud" and then "Send to the SDI"; otherwise send it through your intermediary or accounting software. Orafile prepares the courtesy copy.

### Recording a payment and printing the receipt

1. On the issued invoice, in the "Record a payment" panel, check the Payment date (not before the invoice date or in the future), the Amount received (the amount still due is suggested), the Method and the Account, then press "Record payment".
2. Each payment gets a receipt number (R-1/2026, R-2/2026...) and appears automatically in Income and expenses, in the "Customer payments" category.
3. In the Payments and receipts table use "Receipt PDF", "Print receipt" or "E-mail the receipt". For a payment in several instalments, record one payment per instalment.
4. A payment recorded by mistake is voided with "Void payment", writing the reason: it no longer counts and its entry leaves Income and expenses, while the receipt stays under "Voided receipts" with its number (which is not reused) and its PDF marked as voided.

### Printing, downloading the PDF or sending by e-mail

1. At the top of the invoice, "Download PDF" opens the courtesy copy (for a draft, "PDF preview"); "Print" opens the page ready to print with the "Print" button.
2. In the "Send to the customer" panel open "Send by e-mail": To (the customer's billing contact), Subject and Message are already suggested and can be changed; press "Send invoice". The PDF is attached.
3. For an overdue invoice open "Send a payment reminder": the text states how much is still to pay and the due date.
4. E-mails go out within a minute from the mailbox chosen in Settings > Notifications; under "E-mails sent" you see when they went out or why they did not.

### Cancelling an issued invoice

1. If the invoice has no payments, open "Cancel invoice" at the bottom right, write the Reason for the cancellation and press "Cancel invoice".
2. The number stays used and the invoice shows as Cancelled. For the e-invoice already sent, issue a credit note in the software you use for the SDI; if it was created in Fatture in Cloud but not sent, delete it there.

### Finding the invoices still to collect

1. In Invoices and receipts the figures at the top show the amount invoiced this year, how much is still to collect and how much is overdue.
2. Choose the Status "Overdue" or "To collect" and press "Show"; you can also filter by Year and Customer.

### Common problems

- **Instead of "Issue invoice" there is a warning that my company's details are missing**  
To issue invoices you need your company's name, VAT number or tax code and an address with the city: an administrator fills them in under Settings > Document details.

- **When I issue the invoice it says the date cannot be earlier than the last invoice**  
The numbering follows the order of the dates: open “Edit draft” and set a date on or after that of the last invoice issued in the same year (and not in the future).
- **The e-mail with the invoice does not go out or shows as not sent**  
You need a mailbox that can send chosen in Settings › Notifications and the mail process running on the server. If “E-mails sent” shows “Not sent”, the reason is underneath: usually the mailbox's SMTP details in Settings › Queues and mail.
- **I cannot change an issued invoice**  
An issued invoice can no longer be changed. If it is wrong, cancel it (if it has no payments) and create a new one; for the electronic invoice you need a credit note.
- **I cannot cancel an invoice**  
The invoice has payments recorded: first void them with “Void payment” in the Payments and receipts table, then cancel the invoice.
- **The customer says the PDF is not a valid invoice**  
The PDF is the courtesy copy and says so at the bottom: the invoice that counts for tax purposes is the electronic one sent to the SDI, which the customer finds in their cassetto fiscale (their online tax area) or in their accounting software.
- **“Create invoice” on the order says the order already has an invoice**  
An order is invoiced only once: open the existing invoice from the link. If that invoice was cancelled, the order can be invoiced again.

## 10. Fatture in Cloud (e-invoicing)

**Where to find it:** Settings › Fatture in Cloud; “E-invoice” panel of each invoice.

**What it is for.** The connection with Fatture in Cloud, the online service that sends e-invoices to the SDI (Sistema di Interscambio, the Italian e-invoicing exchange). Each invoice issued in Orafila becomes an e-invoice there with the same number, the customer's details (SDI recipient code and PEC included) and the same lines; from Orafila you send it to the SDI and follow its status (delivered, discarded, in the customer's cassetto fiscale (online tax area)).

**Who can use it.** Connecting Fatture in Cloud and choosing the options: administrators only, from Settings › Fatture in Cloud. Creating invoices, sending them to the SDI and refreshing their status: whoever issues invoices, from the page of each issued invoice.

### How to

#### Connecting Fatture in Cloud

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), press “Collega una nuova applicazione” (Connect a new application), paste the Client ID, choose the company and give it read and write access to invoices and read access to settings.
3. Copy the access token, then in Orafila open Settings › Fatture in Cloud, paste it into “Access token” and press “Connect Fatture in Cloud”.
4. Orafila tries the token straight away and keeps it encrypted; if the token gives access to several companies, choose under Options the one to create the invoices in and press “Save options”.

#### Choosing the Fatture in Cloud options

1. In “Company in Fatture in Cloud” choose where to create the invoices.
2. In “Numbering series (sezionale)” leave it empty for the main numbering, or write for example /PSA if you also issue other invoices in Fatture in Cloud.

3. In “VAT rate for lines at 0% VAT” choose the exemption code (natura, for example N2.2): without it, invoices with lines at 0% VAT are not created.
4. In “‘Other’ payment on the e-invoice” choose the code to use for invoices whose payment method is “Other” (for example MP12, Ri.Ba.).
5. Tick “Create the invoice in Fatture in Cloud as soon as you issue it in Orafile” if you want each issued invoice to go to Fatture in Cloud straight away, then press “Save options”: when saving, Orafile reads the VAT rates again and tests the connection.

### Creating the e-invoice in Fatture in Cloud

1. Open an issued invoice: in the “E-invoice” panel press “Create in Fatture in Cloud”.
2. Orafile checks that Fatture in Cloud works out the same totals, then creates the invoice with the same number; the panel shows the number in Fatture in Cloud and the status “Not yet sent to the SDI”.
3. If something is missing (the VAT rate for 0% VAT, the payment code, the customer's VAT number or tax code) the message says what to do and the invoice is not created.

### Sending the invoice to the SDI and following its status

1. In the “E-invoice” panel press “Send to the SDI” and confirm: Fatture in Cloud checks the XML file and sends it.
2. In a few hours press “Refresh status”: it says whether the invoice was delivered, is in the customer's cassetto fiscale (online tax area) or was discarded by the SDI, with the reason.
3. If the SDI discarded it, correct it in Fatture in Cloud following the reason given and press “Send to the SDI again”. You can also send it straight from Fatture in Cloud.

### Customers' SDI recipient code

1. On the customer page press “Edit the customer's details”, enter the “SDI recipient code” (7 characters, letters and digits; 6 for public administration offices) and press “Save changes”.
2. New invoices suggest it in the billing details together with the PEC; on issue it is fixed on the invoice.
3. Without a recipient code the e-invoice goes out with 00000000: the SDI delivers it to the channel the customer registered, or puts it in their cassetto fiscale (online tax area).

### Common problems

- **It says Fatture in Cloud does not accept the token**  
The token was not copied in full or was revoked: in Fatture in Cloud copy the token of the connected application again (or connect it again), then in Settings > Fatture in Cloud open “Replace the token”, paste it into “New access token” and press “Save new token”.
- **It says the token does not have permission**  
In Fatture in Cloud open Impostazioni > Applicazioni collegate, press “Gestisci” (Manage) next to the application and give it read and write access to invoices and read access to settings.
- **The invoice has lines at 0% VAT and is not created**  
The e-invoice must say why there is no VAT: an administrator chooses the exemption code (natura) in “VAT rate for lines at 0% VAT” in Settings > Fatture in Cloud and presses “Save options”; then try again.
- **Fatture in Cloud works out a different total**  
This rarely happens; it is due to different rounding on lines with many decimals. The invoice is not created, so the e-invoice never says something different from the courtesy copy. Create it by hand in Fatture in Cloud with the same number and amounts.
- **The SDI discarded the e-invoice**  
Press “Refresh status”: the panel shows the reason given by Fatture in Cloud. Correct the invoice in Fatture in Cloud (for example the customer's VAT number or address) and press “Send to the SDI again”: a discarded invoice does not count as issued and is sent again with the same number.

- **The customer rejected the e-invoice**

This happens with public administration offices, after delivery: the invoice is not sent again. Issue a credit note in Fatture in Cloud, cancel the invoice in Orafila and issue a new one.

- **Creating the invoice in Fatture in Cloud did not finish**

Fatture in Cloud did not answer in time: after a couple of minutes check in Fatture in Cloud whether the invoice is already there. If it is not, on the invoice page press “Create again in Fatture in Cloud”.

- **I cancelled an invoice already created in Fatture in Cloud**

If it has not been sent to the SDI yet, delete it in Fatture in Cloud too; if it was already sent, issue a credit note in Fatture in Cloud. Orafila does not change the documents already created there.

- **The numbers in Fatture in Cloud do not match**

Orafila gives the invoice numbers: do not create invoices by hand in Fatture in Cloud with the same numbering. If you also issue other invoices there, choose a different numbering series (sezionale) for those of Orafila (for example /PSA) in “Numbering series (sezionale)”.

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## Purchasing and stock

Suppliers, supplier orders, products and stock, order tracking.

### 11. Suppliers

**Where to find it:** menu › Purchasing and stock › Suppliers.

**What it is for.** The records of the companies you buy from: tax details, contact person, e-mail for orders, address, payment terms and IBAN. On a supplier's page you see the open orders, how much you have ordered this year, the products it is the usual supplier of and the expenses recorded.

**Who can use it.** People with the permission to see suppliers and supplier orders can look at the list and the supplier pages; to create, edit, deactivate or delete suppliers you need the permission to manage suppliers and orders (the Amministratore, Amministrazione and Magazzino roles). Recorded expenses appear on the supplier page only for people who can see income and expenses.

#### How to

##### Adding a supplier

1. Open Suppliers from the menu (Purchasing and stock section) and press “New supplier”.
2. Enter the “Company name”: it is the only required field. The “Supplier code” is optional but, if you use it, it must be unique.
3. Fill in the “E-mail for orders” if you want to send orders as PDFs straight from Orafila.
4. The “Payment terms” are the days from the invoice (0 if you pay on delivery) and appear on the order PDF.
5. Press “Create supplier”: its page opens, from which you can prepare the first order with “New order”.

##### Editing a supplier's details

1. Open the supplier's page and, in the “Manage the supplier” panel, press “Edit supplier details”.
2. Correct the fields and press “Save changes”. Order PDFs prepared from then on show the updated details.

##### VAT number and IBAN: the warnings

1. When you leave the “VAT number” field, a warning appears if the Italian check digit does not match or if the number is not Italian: it does not stop you saving.
2. If the same VAT number already belongs to another supplier, Orafila asks you to confirm: usually it is the same supplier entered twice, but it also happens with the branches of a group. Press “Confirm and save supplier” only if it is intended.

3. For the “IBAN” a warning appears if an Italian IBAN does not have 27 characters or if the check digits do not match.

### Deactivating or deleting a supplier

1. A supplier with no orders, products or expenses can be deleted from its page with “Delete supplier”.
2. If it is already in use, press “Deactivate supplier”: it stays in the history but no longer appears among those you can choose for a new order.
3. To use it again, open its page (in Suppliers choose the “Deactivated” or “All” status) and press “Reactivate supplier”.

### Common problems

- **I cannot delete a supplier**

It has orders, it is the usual supplier of some products or it appears in recorded expenses: its page says which. Press “Deactivate supplier” instead of deleting it.

- **A supplier is not among those I can choose on the order**

It is deactivated. In Suppliers choose the “Deactivated” status, open its page and press “Reactivate supplier”.

- **The supplier code is already in use**

The code is unique, regardless of upper and lower case: the message says which supplier it belongs to. Choose another one or leave the field empty.

## 12. Supplier orders

**Where to find it:** menu › Purchasing and stock › Supplier orders.

**What it is for.** Purchase orders to suppliers (numbered ODA-1, ODA-2...): you prepare them as a draft with lines, prices and VAT, send them to the supplier as a PDF and, when the goods arrive, record the delivery, even in several instalments. The quantities of products tracked in stock go into stock automatically.

**Who can use it.** People with the permission to see suppliers and supplier orders can look at the list, the orders and the PDFs; to prepare, send, receive, cancel or delete orders you need the permission to manage suppliers and orders (the Amministratore, Amministrazione and Magazzino roles). To record the supplier's invoice you also need the permission to record income and expenses.

### How to

#### Preparing an order to a supplier

1. Open Supplier orders from the menu and press “New order” (or “New order” on the supplier's page, which chooses the supplier for you).
2. Choose the “Supplier”, check the “Order date” and, if you know it, enter the “Expected delivery”: it is used to see late orders.
3. In the “Lines” choose a “Product” (it suggests description, purchase price and VAT) or leave “Free line, no product”; then the “Quantity”, “Unit price”, “Discount” and “VAT”. Net amount, VAT and total update as you type.
4. Press “Add a line” for more lines, “Remove” to delete one, then “Create draft order”.
5. While it is a draft you can change everything with “Edit draft”.

#### Sending the order to the supplier

1. Open the order: in the “Send to the supplier” panel leave “Send the PDF to the supplier by e-mail” ticked and check the “Supplier's address” (it comes from the e-mail for orders on the supplier's page).
2. Press “Mark as sent”: the order moves to Sent and the PDF goes out within a minute. From then on lines and prices can no longer change.
3. If e-mail notifications are off, the box cannot be ticked: press “Open PDF”, download it and send it yourself, then press “Mark as sent”.

4. To send the PDF again for an order already sent, use the “Send PDF by e-mail” panel.

### Recording the delivery of the goods

1. Open the sent order: the “Record a delivery” panel suggests the missing quantity for each line.
2. Enter “Received on”, correct the quantities if only part has arrived (0 for what has not arrived) and press “Record delivery”.
3. Lines with a product tracked in stock add the quantity in Products and stock, at the line's purchase price.
4. If everything has arrived the order becomes Received; otherwise Partly received, and you record the rest when it arrives.

### Cancelling or deleting an order

1. A draft you do not need is deleted with “Delete draft”: its number is not reused.
2. A sent order is cancelled with “Cancel order”, writing the reason, as long as nothing has arrived. Let the supplier know too.
3. Once part of the goods has arrived the order can no longer be cancelled: record the delivery of the rest.

### Recording the supplier's invoice

1. From the sent or received order press “Record the supplier invoice”: a new expense opens in Income and expenses, linked to the supplier and the order.
2. The recorded invoice appears on the order, under “Supplier invoices recorded”, and among the payments due until it is paid.

### Finding late orders

1. In Supplier orders the “Late” figure counts the sent orders that were due before today: press it to see them.
2. In the filters choose “Only late ones” under “Delay”, or filter by “Status” and “Supplier”; you can also search by number (ODA-12) or by the supplier's reference.

### Common problems

- **I cannot change the lines or prices of an order**  
The order has already been marked as sent. If needed, cancel it (as long as nothing has arrived) and prepare a new order.
- **The order PDF is not sent by e-mail**  
E-mail notifications are off or the mailbox chosen to send them is incomplete: ask an administrator to sort them out in Settings > Notifications. In the meantime press “Open PDF” and send it yourself.
- **I cannot cancel an order**  
Part of the goods has already arrived: the order can no longer be cancelled. Record the delivery of the rest, or ask the supplier to close the order and write the reason in the notes.
- **The quantity received did not go into stock**  
Only lines with a product tracked in stock go into stock: free lines and services do not. Check on the product page that stock tracking is on, then correct the stock with an adjustment movement.
- **It says fewer are missing than have arrived**  
You cannot record more items than were ordered. If the supplier sent more, record the ones ordered and add the surplus with a movement in Products and stock.

## 13. Products and stock

**Where to find it:** menu > Purchasing and stock > Products and stock.

**What it is for.** All the products you buy and sell (goods, services and software) with code, unit of measure, sale price, purchase cost, VAT rate and usual supplier, and the stock on hand of the goods tracked in stock: deliveries from supplier orders, shipments of customer orders, opening stock, adjustments and returns, with the reorder level and an e-mail alert when it is reached.

**Who can use it.** To see products and stock you need the “sees products and stock” permission; to create and edit products and record movements you need “manages products and stock” (the Amministratore and Magazzino roles). The catalogue is the same as in Settings > Products.

## How to

### Adding a product with prices and VAT

1. Open “Products and stock” from the menu and press “New product”.
2. Enter the “Name” (unique) and, if you like, the “Code” (for example the supplier's item code, which must also be unique) and the “Unit of measure” (pcs, h, days, kg...).
3. Choose the “Type”: Goods for physical items, Service for hours, days and fees, Software for programs installed or sold under licence.
4. Fill in the “Sale price” and the “Purchase cost” in euros excluding VAT and the “VAT rate” (for example 22): they are suggested in order and invoice lines when you choose the product, and can still be changed line by line.
5. If you always buy it from the same company, choose the “Usual supplier”. Press “Create product”.

### Tracking goods in stock and the reorder level

1. When you create or edit a product of type Goods, tick “Track in stock”: from then on Orafila keeps its stock on hand.
2. In the “Reorder level” field write the quantity below which you want to reorder: when stock falls to that quantity or less, the product shows as “Below reorder level” and whoever manages the stock receives an e-mail, if the mailbox that sends notifications is chosen in Settings > Notifications.
3. Deliveries recorded on supplier orders increase the stock and shipments of customer orders decrease it: you do not need to record them by hand.
4. Once the product has movements, stock tracking can no longer be removed: if you no longer sell it, deactivate it.

### Recording opening stock, an adjustment or a return

1. Open the product from the list: on the right is the “Record a stock movement” panel (only for goods tracked in stock).
2. Choose the “Movement”: “Opening stock” for the goods you already have when you start (once only, before any other movement), “Adjustment” after a stocktake or for damaged or found goods, “Return” for goods a customer sends back.
3. For an adjustment choose “Adds goods (stock in)” or “Removes goods (stock out)” and write the “Reason”, which is required.
4. Fill in the “Quantity” and the “Date” (not in the future); the “Unit cost” is optional. Press “Record movement”: the stock is updated at once and the movement appears in the “Stock movements” table.
5. If a stock-out takes the stock below zero, the app says so and asks you to press “Confirm and record movement”.

### Finding the products to reorder and the stock value

1. At the top of “Products and stock” you see how many products are tracked in stock, how many are below the reorder level, how many are out of stock and the stock value at purchase cost.
2. Press “Show products below reorder level or out of stock”, or in the “Stock” filter choose “Below reorder level or out of stock” and press “Show”.
3. The stock value counts only products with a “Purchase cost”: under the figures the app says how many products in stock have none.

## Deactivating or deleting a product

1. On the product page, in the “Actions” panel, press “Deactivate product”: it is no longer suggested in the lines of new orders and invoices, but its history stays. “Reactivate product” puts it back in use.
2. “Delete product” is there only if the product does not appear on any order, invoice, movement, ticket or installation at a customer's premises; otherwise the app explains why it cannot be deleted.
3. To see deactivated products too, choose “Deactivated” or “All” in the “Status” filter.

## Common problems

- **I cannot tick “Track in stock”**

Only goods can be tracked in stock: choose Goods as the “Type”. Services and software have no stock.

- **I cannot remove stock tracking from a product**

The product already has stock movements, which cannot be deleted. If you no longer sell it, press “Deactivate product” on its page.

- **I cannot see the “Record a stock movement” panel**

The panel is there only for goods tracked in stock and for people with the “manages products and stock” permission. Turn on “Track in stock” when editing the product, or ask an administrator to give you access.

- **Opening stock can no longer be recorded**

Opening stock is recorded only once, before any other movement. To bring the stock in line after a stocktake, use an “Adjustment”.

- **Stock is below zero**

Goods went out that were not recorded as in stock, for example a shipment recorded before the delivery from the supplier. Count the goods and record a stock-in “Adjustment” with the reason.

- **No e-mail arrives when a product falls below the reorder level**

The e-mail goes out only if the product has a “Reorder level”, if a mailbox that can send is chosen in Settings > Notifications with the reorder level alert turned on, and only at the moment the stock falls to that level. It goes to active users with the permission to manage stock.

- **The product cannot be deleted**

It appears on orders, invoices, movements, tickets or installations at customers' premises: the app lists where. To stop using it, press “Deactivate product”.

## 14. Order tracking

**Where to find it:** menu > Purchasing and stock > Order tracking.

**What it is for.** A single view of the orders still open: confirmed or shipped customer orders and supplier orders sent but not yet fully received, with the expected date, the days late, the last update and the carrier's tracking. Late orders are at the top.

**Who can use it.** People who see customer orders find those; people who see supplier orders find those; with both permissions the page shows them together. To change an order you need the permissions of its module.

### How to

#### Seeing which orders are late

1. Open Order tracking: the figures at the top count Late, To ship, In transit to customers and Expected from suppliers.
2. The list shows late orders first, oldest first: the “Expected date” column says by how many days.
3. To see only those, choose “Late only” under “Expected date” and press “Filter”.

#### Finding an order or a shipment

1. In “Search” type the number (ODV-12 for a customer, ODA-3 for a supplier), the tracking code, the customer's or supplier's reference, or the name.

2. With both permissions, under “Orders” choose “Customer orders” or “Supplier orders” to see one kind only. “Show all” clears the filters.
3. Press the order number to open it; in the “Shipment” column the tracking code opens the carrier's website, if the order has the link.

### Updating an order

1. Tracking is read-only: open the order to record the shipment or the delivery (customer orders) or the delivery of the goods (supplier orders).
2. An order leaves tracking when it is delivered, fully received or cancelled. Drafts do not appear until they are confirmed or sent.

### Common problems

- **An order does not appear in tracking**  
Only open orders appear: customer orders that are confirmed or shipped, supplier orders that are sent or partly received. A draft must first be confirmed (or sent to the supplier); a delivered, received or cancelled order is closed. Check the filters and your permissions too.
  - **An order shows as late but it has already arrived**  
The delay is calculated from the expected date until the order is closed: open the order and record the delivery or the receipt of the goods, and it leaves the list.
  - **I cannot see supplier orders (or customer orders)**  
Your role lets you see only one of the two kinds: ask an administrator to add the missing permission in Settings › Roles.
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## Administration

Income and expenses, accounting, employees and absences, reports.

### 15. Income and expenses

**Where to find it:** menu › Administration › Income and expenses.

**What it is for.** The company's cash book: expenses, bills, supplier invoices and income that does not come from an invoice issued in Orafile, with what is still to pay or collect, the due dates and the accounts (bank, cash, cards) with their balance. Payments of issued invoices appear here automatically.

**Who can use it.** People with the permission to see income, expenses and accounting can look at the page; to record, edit and delete entries and accounts you need the permission to record income and expenses (the Amministratore and Amministrazione roles).

#### How to

#### Recording an expense or a supplier invoice

1. Open Income and expenses and press “New entry”.
2. In “Type of entry” leave “Expense”, then fill in the “Date”, the “Category” (choose from the list, for example Utilities, or write a new one) and the “Description”.
3. In “Total amount” write how much there is to pay including VAT and choose the “VAT rate”: under “Breakdown” you see the net amount and the VAT. If the document shows a different VAT amount, write it in “VAT in euros”.
4. Optional: choose the “Supplier” and write the “Document number” and the “Due date”.
5. If you have already paid it, fill in “Paid on” and choose the “Account”; otherwise leave it empty and the expense stays “To pay”. Press “Record the entry”.

## Recording the supplier invoice for an order

1. From the supplier order page use the link to record its invoice: “New entry” opens already filled in with supplier, order, order amount and due date based on the supplier's payment terms.
2. Check the amount against the invoice you received, enter the “Document number” and press “Record the entry”.

## Recording income that does not come from an invoice

1. Press “New entry” and choose “Income”.
2. Fill in date, category (for example Refunds or Grants), description, total amount and VAT rate; the “Customer” is optional.
3. Payments of invoices issued in Orafila are not recorded here: they are recorded on the invoice with “Record a payment” and appear in Income and expenses automatically.

## Marking an expense as paid

1. In Income and expenses set the “Status” filter to “To pay” or “Overdue” and press “Mark as paid” under the entry.
2. In the “Mark as paid” panel check the date, choose the account and press “Mark as paid”: the account balance is updated.

## Finding the entries of a period and exporting them

1. Choose the “Year” and “Month” (or “Whole year”) and, if needed, the “Type”, “Status”, “Category” or a word in “Search”; press “Show”.
2. The “Summary” at the top shows the period's income, expenses and balance, how much there is to pay in total and how much is overdue.
3. “Export to CSV” downloads the entries of the chosen period in a file that Excel opens with the right columns, ready to send to your accountant.

## Managing accounts

1. In Income and expenses press “Accounts”.
2. In the “Add an account” panel write the name (for example Banca Intesa or Cash), the type, the IBAN if you like, the “Opening balance” and its date, then press “Add the account”.
3. The “Balance today” is the opening balance plus the payments received and minus the payments made recorded from that date. With “Edit” you change the details or untick “Active” so that it is no longer suggested.

## Common problems

### • I cannot edit or delete a payment received

Payments recorded on an invoice can be changed only from the invoice: open the entry and press “Open invoice ...”; there a wrong payment is voided with “Void payment” and the right one is recorded again.

### • The form asks me to choose the account

If you have at least one active account, a payment must be assigned to an account, so that the balances add up. Choose the account or, if the payment has not happened yet, clear “Paid on”.

### • An account balance does not match the bank statement

Check the “Opening balance” and its date in Accounts: payments before that date are not counted. Then look for entries paid without an account or with the wrong account and correct them.

### • The VAT calculated is different from the document's

Enter the exact amount in “VAT in euros”: the net amount becomes the total minus the VAT you wrote.

### • I cannot delete an account

An account with entries or payments recorded cannot be deleted, so as not to distort the balances: edit it and untick “Active”.

## 16. Accounting

**Where to find it:** menu › Administration › Accounting.

**What it is for.** The company's financial picture by year or quarter: simplified profit and loss (revenue from issued invoices, other income and costs, month by month), VAT summary by quarter, account balances, amounts owed by customers and amounts owed to suppliers by due date. It helps you keep the situation under control and does not replace your accountant's books.

**Who can use it.** People with the permission to see income, expenses and accounting (the Amministratore and Amministrazione roles). The page is read-only: the data comes from Invoices and receipts and from Income and expenses.

### How to

#### Reading the profit and loss

1. Open Accounting, choose the “Year” and the “Period” (the whole year or a quarter) and press “Show”.
2. At the top: revenue from issued invoices, other income, costs and result (profit or loss), all excluding VAT.
3. The table shows the same amounts month by month, with blue bars for income and purple bars for costs.
4. Invoices count by issue date (not drafts or cancelled invoices); expenses and other income by document date. Invoice payments are not counted twice.

#### Seeing how much VAT to pay

1. In the “VAT summary” each quarter shows the output VAT (on issued invoices and other income), the input VAT (on recorded expenses) and the balance “To pay” or “In credit”.
2. It is an indicative calculation for the standard VAT scheme: it does not take into account split payment, reverse charge, pro rata, advance payments or credits from previous years. Always check with your accountant before paying.

#### Checking who owes you and what you owe

1. “Owed by customers” adds up the issued invoices not yet fully paid, grouped by how overdue they are, with the customers who owe the most and the oldest due dates.
2. “Owed to suppliers” adds up the unpaid expenses in Income and expenses, grouped by due date, with the next ones to pay.
3. Amounts owed by customers and to suppliers are always as of today, whatever period you have chosen.

#### Common problems

- **Revenue is zero even though I have made invoices**  
Only invoices issued in the chosen period count: drafts do not. Issue the invoice from Invoices and receipts or check the year and quarter you chose.
- **Some costs are missing**  
Costs are the expenses recorded in Income and expenses with a document date in the period: record the missing expenses and supplier invoices.
- **The VAT to pay does not match my accountant's figure**  
The summary is indicative: it does not know about partial deductions, split payment, reverse charge, advance payments or earlier credits. Use it to estimate the amount, but your accountant's calculation is the one that counts.
- **A customer shows as owing money but has already paid**  
Record the payment on the invoice with “Record a payment”: the invoice leaves the amounts owed once it is fully paid.

## 17. Employees and absences

**Where to find it:** menu › Administration › Employees and absences; “My absences” at the bottom of the side menu, for whoever has an employee record.

**What it is for.** The company's people and their absences: each employee's record (job title, department, contract, weekly hours, holiday allowance), holiday, time off, sick leave and training, the requests to approve and the holiday left for the year, counted in working days on the company calendar.

**Who can use it.** With the permission to see employees you can look at records and absences; with the permission to manage them you add and edit records, record absences and approve or reject requests (default role Risorse umane, HR). Only people who manage employees see the hourly cost. Anyone whose user is linked to an employee record uses the My absences page without any special permission.

### How to

#### Adding an employee

1. In Employees and absences press “New employee”.
2. Enter the “Full name”; the other fields (Job title, Department, Contract type, Weekly hours, Hire date, Holiday days per year, Hourly cost, Notes) can be filled in later. “Holiday days per year” is 20 unless you change it.
3. In “Orafile user” choose the person's user: they can then request absences from My absences and receive the decision by e-mail. If the “Hourly cost” is empty, it is filled in with the user's.
4. Press “Add employee”: the record opens. To change the details use “Edit” on the record.

#### Recording holiday, time off or sick leave

1. Open the employee's record and use the “Record an absence” panel.
2. Choose the “Type” (Holiday, Time off, Sick leave, Training, Other) and the dates “From” and “To” (inclusive; empty for a single day).
3. For a few hours' time off enter the “Hours” and a single day: hours do not reduce the holiday allowance. Holiday and sick leave are recorded in whole days.
4. For sick leave enter only the dates, with no diagnosis or certificates in the “Note”.
5. Press “Record absence”: an absence recorded by someone who manages staff is approved at once and appears in the “Absences” table.

#### Approving or rejecting a holiday request

1. Requests appear in Employees and absences in the “Requests to approve” panel, with the working days requested and the holiday that would be left; they also appear in the “Absences” table on the record.
2. Press “Approve” or “Reject”. With “Add a note” you write a message that is included in the e-mail to the person.
3. Your own requests are decided by someone else who manages staff.
4. To remove an absence already approved press “Cancel” on its row and confirm with “Cancel absence”: the days become available again.

#### Requesting an absence from My absences

1. Open My absences: you see your holiday for the year and all your absences with their status.
2. In the “Request an absence” panel choose the type and dates and press “Send request”: the status is “Awaiting approval”.
3. Whoever manages staff receives an e-mail (if notifications are on) and decides; the decision arrives by e-mail and appears in the “Status” column.
4. With “Cancel” you withdraw a request, or an approved absence that has not started yet.

## Reading the holiday left

1. The record's "Holiday" panel shows Allowance, Taken or approved, Pending and Left for the current year; with the links under the panel you look at the previous or the next year.
2. Only working days on the company calendar count: weekends, Italian national holidays and company closures (Settings › Company) do not.
3. Holiday spanning New Year counts in each year for its own days. In the employee list the "Holiday left" column also subtracts the holiday requested and pending.

## When someone leaves the company

1. Open the record, press "Edit" and enter the "End of employment": from the next day the person is no longer among the "Current employees", but the record stays with the history of absences (filter Status › Former employees).
2. A record with no absences can be deleted with "Delete employee"; with absences recorded it stays, for the history.

## Common problems

- **When I record an absence it says there are no working days in the period**  
The dates chosen fall only on weekends or holidays: check "From" and "To". Company closures are set in Settings › Company.
- **It says the absence overlaps another one**  
The person already has an approved or pending absence on those days: cancel the other one first or change the dates. Two time-off periods by the hour on the same day are allowed.
- **My absences says my user is not linked to an employee record**  
Ask whoever manages staff to open your record in Employees and absences, press "Edit" and choose your user in "Orafile user".
- **I cannot see the Approve and Reject buttons**  
You need the permission to manage employees (role Risorse umane or Amministratore) and a request that is not your own: yours are decided by someone else.
- **The person did not receive the e-mail with the decision on their request**  
E-mails go out only with notifications on in Settings › Notifications and the absence alerts turned on, and only if the record has an e-mail address or a linked user. Also check the mailbox status in Settings › Queues and mail.
- **I cannot cancel one of my absences that has already started**  
An approved absence that has already started can be cancelled only by someone who manages staff, from the employee's record.

## 18. Reports

**Where to find it:** menu › Administration › Reports.

**What it is for.** The year's figures on one page: sales (revenue by month compared with the year before, top customers, collected and overdue), customer orders, purchases, stock, support, income and expenses, people. Every chart has its values in a table and every section can be downloaded as CSV for Excel. The page is read-only: the data is changed in the respective modules.

**Who can use it.** People with the permission to see reports (default roles Amministratore, Responsabile assistenza, Commerciale, Amministrazione and Risorse umane). Each section appears only if the role can also see the area the figures come from: Sales with invoices, Customer orders with customer orders, Purchases with suppliers and supplier orders, Stock with products and stock, Support with tickets, Income and expenses with income, expenses and accounting, People with employees.

## How to

### Reading a year's reports

1. Open Reports from the menu, in the Administration group.
2. Choose the year in the "Year" field and press "Show"; "Back to" followed by the current year takes you back to this year.
3. The links under the filter take you to the sections. At the top of each section are the year's totals, with the charts below.
4. Hover over a bar to read the month's value; "Show the data" under each chart opens the table with all the values, also for people who use the keyboard or a screen reader.

### What each report section counts

1. Sales: issued invoices, by invoice date, excluding VAT; drafts and cancelled invoices do not count. "Collected" and "To collect" include VAT; "of which overdue" is the amount past its due date.
2. Customer orders: confirmed, shipped or delivered orders count; "Late today" are the open orders past their expected date, from any year.
3. Purchases: supplier orders sent, by order date, excluding VAT; drafts and cancelled orders do not count.
4. Stock: today's stock on hand and its value at purchase price, products below the reorder level or out of stock, products shipped most in the year.
5. Support: tickets opened and resolved by month (a ticket closed without being marked resolved counts when it is closed) and hours worked logged on tickets.
6. Income and expenses: payments received and made with a payment date in the year, including VAT and invoice payments; expenses by category exclude VAT and go by document date.
7. People: employees on the payroll today, hired and leaving in the year, approved absences in working days (excluding Saturdays, Sundays and holidays on the company calendar) and hours of time off.

### Comparing with the previous year

1. In the "Revenue by month" chart the blue bars are the chosen year, the grey ones the year before.
2. Under "Revenue (net amount)" the percentage compares with the same period of the year before: for the current year, the same months; for a past year, the whole year.

### Downloading the data for Excel

1. In each section press "Download the data (CSV)": the file contains the values by month and the section's rankings for the chosen year.
2. The file opens with a double click in Excel: comma as separator, full stop for decimals, amounts in euros without the symbol.

### Common problems

- **I cannot see Reports in the menu**

Your role does not have the permission to see reports: ask an administrator to add it to your role in Settings › Roles.

- **A section is missing from the reports, for example Sales or People**

Each section also needs the permission for the area the figures come from (invoices for Sales, employees for People and so on): ask an administrator to add it to your role.

- **The revenue in the reports does not match my accountant's**

Reports count only the invoices issued in Orafile, by invoice date, excluding VAT and excluding cancelled invoices; they do not see credit notes or invoices made with other software. For the official accounts, your accountant's records are the ones that count.

- **The income in the reports does not match the revenue**

They are two different measures: Sales counts invoices by issue date, excluding VAT; Income and expenses counts the money collected by payment date, including VAT. An invoice issued in December and paid in January is December revenue and January income.

- **The stock value looks too low**

The value uses the purchase price: products in stock without a purchase price do not count, and the panel says how many there are. Enter the purchase price on the product page, in Products and stock.

- **The CSV file opens in Excel all in one column**

Excel did not recognise the separator: in Excel choose Data › From Text/CSV, open the file and choose comma as the separator.

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## Settings (administrators)

The company's configuration, reserved for whoever manages settings and users.

### 19. Company settings

**Where to find it:** Settings › Company.

**What it is for.** The company's rules: name, hourly rate, rounding and minimum charge for time, service times (SLA) by priority, ticket categories, days to reopen a closed ticket, company holidays and use of the AI assistant.

**Who can use it.** Administrators only (the “manages settings and users” permission).

#### How to

#### Changing service times, rate or categories

1. Open Settings › Company.
2. Under “Service times (SLA)” set the “First response” and “Resolution” for each priority, in working hours (0.5 for half an hour).
3. Under “Rate and time charging” set the “Hourly rate”, “Round up to every”, “Minimum charge per job” and “Also charge travel time”.
4. Under “Tickets” write the “Ticket categories” (one per line) and the “Days to reopen a closed ticket”.
5. Press “Save settings”: the SLA and the figures of every ticket are recalculated at once; time already deducted from the hour bank does not change.

#### Adding the days the company is closed

1. Under “Company holidays” write one date per line (for example 07/12/2026) and save: SLA clocks do not run on those days. Italian national holidays are already included.

#### Turning AI on or off

1. Under “AI assistant” tick or untick “Use the AI assistant” and save. When it is off, Orafila no longer sends any request to the AI.
2. Which AI agent answers, the monthly budget and the credits are chosen in Settings › Artificial intelligence.

#### Common problems

- **I cannot see Settings**

Settings are for administrators only: ask an administrator to give you the role, if needed.

- **The settings are not saved**

The summary at the top says how many fields are highlighted. For example, resolution cannot take fewer hours than first response, and at least one category is needed.

- **What are the default values**

Rate €60 an hour; rounding and minimum charge 15 minutes; travel not charged; reopening within 15 days; SLA first response / resolution: Urgent 0.5 h / 4 h, High 2 h / 16 h, Normal 8 h / 40 h, Low 16 h / 80 h.

## 20. Document details

**Where to find it:** Settings › Document details.

**What it is for.** Your company's details printed on invoices, orders and receipts: company name, VAT number, tax code, registered address, contact details, IBAN and bank, payment days suggested on new invoices and invoice footer notes.

**Who can use it.** The company's administrators only (permission to manage settings and users).

### How to

#### Completing the document details

1. Open Settings › Document details.
2. Fill in Company name, VAT number (or Tax code), Registered address, Postcode, City and Province: without a company name, a VAT number or tax code and an address with the city, invoices cannot be issued.
3. Add E-mail, PEC (certified e-mail) and Phone if you want them to appear on documents.
4. Press "Save details": on the right, the Letterhead preview shows how your company will appear.

#### IBAN, suggested due date and invoice footer notes

1. Enter the IBAN and the Bank: they appear on invoices to be paid by bank transfer, together with a payment reference containing the invoice number.
2. In Payment terms in days enter how many days after its date a new invoice falls due (for example 30): the due date can still be changed on each invoice.
3. In Invoice footer notes write, for example, share capital, REA number (company register) or tax regime: they go at the bottom of every invoice.

#### Choosing the document language

1. In the Language section choose the "Document language" (Italiano or English) and press "Save details".
2. It is the language of the PDFs of invoices, receipts and orders, of e-mails to customers and suppliers (order confirmations, shipping notices, invoices, payment reminders, automatic replies) and of the notes the app writes in the history, such as order events and ticket system messages.
3. It does not change the interface language: everyone chooses their own with the language button at the bottom of the side menu. It is the language suggested when you invite a new user, and the Letterhead preview already uses it.

#### Common problems

- **When I save it says the IBAN is not correct**

The IBAN's check digits do not match: copy it in full from your bank statement or the bank's website (in Italy it has 27 characters and starts with IT).

- **A warning appears next to the VAT number**

The Italian check digit does not match, or it is not an Italian VAT number: check the digits. The warning does not stop you saving.

- **I have changed the details: do invoices already issued change?**

PDFs and printouts use the company details saved now, also for invoices already issued; the customer's details, on the other hand, stay as they were fixed when the invoice was issued. The electronic invoice already sent does not change.

## 21. Users

**Where to find it:** Settings › Users.

**What it is for.** The people in the company who use Orafila: invitations, roles, unlocking sign-in, resetting two-step verification or access, suspension.

**Who can use it.** Administrators only.

### How to

#### Inviting a colleague

1. In Settings › Users, in the “Invite a user” section, enter the “First name and surname” and the “E-mail” and select at least one role.
2. Choose the “Language” of the interface and notifications (the company's document language is suggested): the person can also change it themselves.
3. Press “Invite the user”, then “Copy link”, and send the link to the person through a secure channel: Orafila does not send e-mails for invitations.
4. The link is valid for 7 days and can be used once: the person chooses a password and sets up two-step verification the first time they sign in.

#### Changing roles

1. Open the user, select the roles under “User's roles” and press “Save roles”: they apply from the next page the person opens.

#### Setting an agent's skills

1. Open the user and, in the “Skills” panel, select under “Ticket categories they handle” the categories they deal with, then press “Save skills”.
2. AI triage uses them to suggest who to assign a ticket to: if the AI names nobody, it suggests whoever has the suggested category among their skills and the fewest open tickets, otherwise the least busy of all. They only count for active users with a role that works on tickets.
3. The categories are those in Settings › Company: if you rename or remove one, the user's page points it out. If you renamed it, tick the new name, then press “Save skills” to remove the old one.

#### Changing a user's language

1. Open the user and, in the “Language” panel, choose the “Interface language” and press “Save language”: it applies from the next page the person opens and to their e-mail notifications.
2. The person can also change it themselves with the language button (“English” or “Italiano”) at the bottom of the side menu.

#### Helping a colleague who cannot sign in

1. Locked out after 5 wrong attempts: open the user and press “Unlock sign-in” (otherwise it unlocks by itself after 15 minutes).
2. Phone changed or lost: press “Reset two-step verification” and confirm; the next time they sign in they will set up the app again.
3. Forgotten password: press “Reset access”, confirm, then press “Create a new invitation link” and send it to them.
4. Invitation expired or lost: press “Create a new invitation link”; the previous one stops working.

#### Suspending someone who leaves the company

1. Open the user, press “Suspend the user” and “Confirm the suspension”: their sessions are closed.

2. Their tickets stay assigned to them: reassign them from “See the tickets to work on assigned to...”. “Reactivate the user” gives them access again.

### Common problems

- **I cannot suspend a user or remove an administrator role**

The company must always have at least one active administrator, and nobody can suspend themselves or remove their own administrator role: give the role to someone else first.

- **The user shows as “No password: cannot sign in”**

They have never chosen a password: create a new invitation link from their page and send it to them.

- **I have lost the invitation link I just created**

The link is not shown again: create a new invitation link from the user's page.

- **Triage suggests the wrong agent for a category**

The AI chooses by looking at each agent's skills and open tickets; if it names nobody, it suggests whoever has the suggested category among their skills and the fewest open tickets, otherwise the least busy of all. Check in the agents' “Skills” panel who has that category and correct it; meanwhile, on the ticket, choose the right agent in “Assign to” and press “Assign the ticket”.

## 22. Roles and permissions

**Where to find it:** Settings › Roles.

**What it is for.** The company's roles and their permissions. A role is a set of permissions (seeing tickets, managing stock, issuing invoices, approving absences...): it decides what the people who have it can see and do. A person can have several roles and gets all their permissions combined. Besides the default roles you can create your own, for example Warehouse operator or Bookkeeping.

**Who can use it.** Administrators only (people with the permission to manage settings and users), from Settings › Roles.

### How to

#### Creating a role

1. In Settings › Roles press “New role”.
2. Enter the “Role name” (for example Warehouse operator) and tick the permissions in the groups Support, Customers, Sales and invoices, Purchasing and stock, Administration, People and Company.
3. Press “Create role”, then give it to people from their page in Settings › Users, “User's roles” section.

#### Changing a role's permissions

1. In Settings › Roles open the role, change its name or permissions and press “Save role”.
2. The new permissions apply at once to everyone who has the role, from the next page they open.
3. Every edit permission includes the one to see: if you choose “Manages customer orders”, “Sees customer orders” is added automatically.

#### Seeing who has a role

1. In the list of roles the “Who has it” column counts the people; open the role to see them in the “Who has this role” panel, with a link to their page.

#### Deleting a role

1. Open the role and press “Delete the role”, then confirm. Only a role nobody has can be deleted: first give those people another role.

## Common problems

- **I cannot remove settings management from a role**

The company must always have at least one active user who manages settings, and nobody can remove the permission from the role that gives it to themselves: first give another administrator role, or ask another administrator.

- **The “Delete the role” button is not there**

The role is given to someone: the “Who has this role” panel says who. Change those people's roles in Settings › Users, then delete the role.

- **I gave a permission but the person still cannot see the module**

Permissions apply from the next page the person opens: they need to reload the page. Also check that the right permission is ticked: for example, Order tracking needs the permission to see customer orders or supplier orders.

- **A permission was added by itself when I saved**

It is the permission to see that an edit permission you chose needs: anyone who can change something must also be able to see it. To remove it, first remove the edit permission.

## 23. Queues and mail

**Where to find it:** Settings › Queues and mail.

**What it is for.** The support queues and their mailboxes: each queue receives requests at one address, numbers its tickets with its own prefix (TCK-1042) and, once its mailbox is connected, reads the e-mails (IMAP) and sends replies and acknowledgements of receipt (SMTP).

**Who can use it.** Administrators only.

### How to

#### Connecting a queue's mailbox

1. In Settings › Queues and mail open the queue.
2. Under “Receiving (IMAP)” write the “IMAP server”, “Port” (993 with TLS), “User name”, “Password” and “Folder” (usually INBOX).
3. Under “Sending (SMTP)” write the “SMTP server”, “Port” (465 with TLS or 587 with STARTTLS), user name, password, “Sender address” and, if you like, “Sender name”.
4. Tick “Mailbox on” and press “Save the mailbox”, then “Test the connection”.
5. Reading starts within a couple of minutes. The first time, only the 50 most recent unread e-mails are imported.

#### Adding a queue

1. In the “Add a queue” panel write the “Queue name” and the “Ticket prefix” (1 to 5 letters), choose the “Acknowledgement of receipt” and press “Add the queue”. Then connect its mailbox.

## Common problems

- **“User name or password not accepted”**

Gmail and Google Workspace need an app password. Microsoft 365 does not allow IMAP reading with a password alone (it needs OAuth, not supported yet); sending works only with SMTP AUTH.

- **Encrypted connection or port error**

Usually 993 and 465 use TLS, 143 and 587 STARTTLS: set “Encrypted connection” to match the port. Some server providers (DigitalOcean, for example) block SMTP ports 25, 465 and 587: use a sending service on port 2525.

- **The last read stays at “Never” or is old**

Orafila's mail process is not running: tell whoever manages the server. The e-mails stay in the mailbox and are read when it starts again.

- **Replies are not going out (“E-mails not sent”)**

Orafila tries again after 1, 5, 15 and 60 minutes, then stops. Read the reason in the “E-mails not sent” table, correct the mailbox and reply again from the ticket.

- **“You changed the server, port or user name: for security, type the password again”**

Saved passwords are valid only for the server, port and user they were typed for: type it again and save.

- **The same e-mail becomes two tickets**

Two queues cannot read the same mailbox and folder: Orafila prevents it when you save. Use a different mailbox or folder for each queue.

## 24. E-mail notifications

**Where to find it:** Settings › Notifications.

**What it is for.** Which mailbox Orafila's automatic e-mails are sent from and which alerts to send. The same mailbox sends the alerts (reorder level, absence requests and decisions) and the documents sent by e-mail (invoices, order confirmations, supplier orders, receipts). The mailbox is that of a support queue set up in Settings › Queues and mail.

**Who can use it.** Administrators only, from Settings › Notifications.

### How to

#### Turning on e-mail notifications

1. First connect and turn on a queue's mailbox in Settings › Queues and mail, with the SMTP details and the sender address.
2. In Settings › Notifications, under “Sending mailbox”, choose the queue; next to each queue it says which address it sends from or what it is missing (“Cannot send”).
3. Under “Alerts to send” tick “Reorder level” and “Absences” if you want those alerts, then press “Save notifications”.
4. Press “Send a test e-mail”: it reaches your address within a couple of minutes, if the mail process is running.

#### Turning off e-mail notifications

1. Under “Sending mailbox” choose “None” and press “Save notifications”: Orafila no longer sends any alerts or documents by e-mail.

#### Checking what has been sent

1. The “Status” panel says whether notifications are on and which address they are sent from.
2. The “Recently sent” table lists the latest alerts and documents with recipient, subject and status (Queued, Sent, Not sent with the reason).

#### Common problems

- **Notifications or invoices by e-mail are not going out**

Look at the “Status” panel: if it says “Off”, follow the instructions (choose a mailbox or complete it in Settings › Queues and mail). If messages stay “Queued” for a long time, the mail process on the server has stopped: tell whoever manages the server. If they show “Not sent”, the reason is written next to them.

- **The chosen queue says “Cannot send”**

Its mailbox is not turned on, or is missing the SMTP server or the sender address: press “Complete the mailbox” and save the details in Settings › Queues and mail.

- **Who receives the reorder level and absence alerts?**

Reorder level alerts go to active people with the permission to manage products and stock; absence requests go to whoever manages employees and absences, and the decision goes to the person who asked. Who receives them is changed through the roles in Settings › Roles.

- **Customers reply to the invoice e-mail**

Replies arrive in the chosen queue's mailbox and become tickets like the customers' other e-mails.

## 25. Products

**Where to find it:** Settings › Products.

**What it is for.** The catalogue of the products the company installs or sells: it is used to record the products installed at customers' premises and to name them on tickets.

**Who can use it.** Administrators who can also edit customers.

**How to**

### Managing the catalogue

1. In Settings › Products write the "Product name" and press "Add product".
2. "Rename" also changes the name in installed products and tickets; "Delete from catalogue" works only for products nobody uses.

### Recording what a customer uses

1. From the customer page open "Installed products", choose the "Product", enter the "Version", choose the "Installation" and the "Site", then press "Add the product".

### Common problems

- **I cannot delete a product**

It is installed at some customer's premises: if you no longer sell it, rename it, for example by adding "discontinued".

## 26. Activity log

**Where to find it:** Settings › Activity log.

**What it is for.** The record of who did what and when: successful and failed sign-ins, password changes, users and roles, customers and contracts, tickets, products and stock, documents and company settings. The log cannot be edited or deleted, and it never shows passwords, codes or other secrets.

**Who can use it.** Administrators only, from Settings › Activity log.

**How to**

### Looking for a change

1. In Settings › Activity log choose the "Area" (for example Users and roles or Sign-ins and passwords), "Who", the period with "From" and "To", or write a "Text" that appears in the action or the details (for example a customer's name), then press "Filter".
2. Each row says when (Italian time), who, what and the details; the record's name links to its page, if it still exists.
3. Press "Older activity" to go back in time and "Back to the most recent" to start again; "Clear filters" shows everything again.

### Checking a person's sign-ins

1. Choose the "Area" Sign-ins and passwords and the person in "Who": you see their sign-ins, the failed ones, password changes and sign-outs from other devices, with the IP address when it was recorded.

## Common problems

- **The log shows “System” instead of a person**

The change was made by a command on the server (company activation, sample data, an address assigned by the platform operator) and not by a person in the app. To see all of them choose System and platform operator in “Who”.

- **The record's name is not a link**

The record has been deleted, or it has no page of its own: the row's details still say what it was.

- **There are many “Failed sign-in” rows for a user**

Someone is getting the password or code wrong: after 5 attempts sign-in is locked for 15 minutes. If it was not the person themselves, ask them to change their password and sign out of other devices from “Password and sessions”.

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## Default roles

Default roles (change them, or create others, in Settings › Roles), named in English in a company set up in English and in Italian otherwise: Administrator / Amministratore (everything, including settings, users and roles); Support manager / Responsabile assistenza (tickets, inbox, customers, reports, AI assistant); Technician / Tecnico (sees and works on tickets, sees customers, sorts the inbox, uses the AI assistant); Sales / Commerciale (sees tickets and customers, manages customer orders, sees invoices, products and reports, uses the AI assistant); Accounts / Amministrazione (invoices and payments, income and expenses, accounting, suppliers and supplier orders; sees customers, customer orders, products, employees and reports); Warehouse / Magazzino (products and stock, suppliers and supplier orders; sees customer orders); Human resources / Risorse umane (employees and absences, reports). Every default role sees the calendar (the company's and every group's) and adds events to it. Only people who can work on tickets appear among the agents tickets can be assigned to.