KMU | base

Feature overview

6 apps, 671 features, one login, one subscription.

KMU | base connects six apps so HR, finance, sales, quality, documents and the website work with the same data.

- ✓ **Unlimited user accounts**
- ✓ **Data migration within 24 hours (working days)**
- ✓ **No setup fee**
- ✓ **Payroll, document archiving and audits are included in the relevant app you subscribe to.**
- ✓ **Edit Office files together in the browser**

20 employees, all 6 apps, one website

CHF 234.–

per month, excluding VAT

With one till, CHF 263.– per month in total

Job | base is a separate offer for recruitment agencies.

A tick indicates a feature included with the app or offer shown.

KMU | base

What’s included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
What’s included at no extra cost								
Unlimited user accounts	✓	✓	✓	✓	✓	✓	✓	✓
Data migration within 24 hours (working days)	✓	✓	✓	✓	✓	✓	–	–
AI assistant with a monthly allowance	✓	✓	✓	✓	✓	✓	–	✓
Edit Office files together in the browser	–	–	–	–	✓	–	–	–
Shared storage for the SME subscription	100 GB to start	100 GB to start	100 GB to start	100 GB to start	100 GB to start	100 GB to start	–	–
Data hosted in Switzerland	✓	✓	✓	✓	✓	✓	✓	✓
Ongoing updates	✓	✓	✓	✓	✓	✓	✓	✓
Employee app for iOS and Android	✓	✓	–	✓	✓	–	–	✓
Software fault support, help articles and demo videos	✓	✓	✓	✓	✓	✓	✓	✓
No setup fee	✓	✓	✓	✓	✓	✓	–	–
Guided setup with a checklist	✓	✓	✓	✓	✓	✓	–	–
Payroll, document archiving and audits are included in the relevant app you subscribe to.	✓	✓	✓	✓	✓	✓	–	–
Terms – prices and allowances at a glance								
Personal setup help and training	Additional CHF 90.– per hour	Additional CHF 90.– per hour	Additional CHF 90.– per hour	Additional CHF 90.– per hour	Additional CHF 90.– per hour	Additional CHF 90.– per hour	Additional CHF 90.– per hour	Additional CHF 90.– per hour
Data migration for recruitment agencies	–	–	–	–	–	–	–	Quote on request

KMU | base

What's included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
Terms – prices and allowances at a glance								
Minimum term, then cancellable at month-end	12 months	12 months	12 months	12 months	12 months	12 months	–	12 months
Employees at list prices, then by quote	Up to 1'000	Up to 1'000	Up to 1'000	Up to 1'000	Up to 1'000	–	–	–
Till used for sales that month, with Finance | base	–	–	–	–	–	–	Additional CHF 29.–	–
Recruitment agency plan per month (HR, Finance and Sales)	–	–	–	–	–	–	–	CHF 199.–
Active candidates included	–	–	–	–	–	–	–	10'000
Per additional 1'000 active candidates	–	–	–	–	–	–	–	Additional CHF 10.–
Internal employees included in the agency plan	–	–	–	–	–	–	–	10
Per additional internal employee	–	–	–	–	–	–	–	Additional CHF 2.–
Per temporary worker on assignment whose payroll is run by the agency	–	–	–	–	–	–	–	Additional CHF 2.–
Send postal mail directly from the app	–	Priced per item	–	–	–	–	–	Priced per item
Email on your own domain, per mailbox per month	–	–	–	–	–	Additional CHF 5.–	–	–
Newsletter emails included per month	–	–	10'000	–	–	–	–	10'000
AI assistant – everyday questions and tasks								
Ask how to use the software in your language	✓	✓	✓	✓	✓	✓	–	✓
Dictate text and review drafts before using them	✓	✓	✓	✓	✓	✓	–	✓

KMU | base

What’s included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
AI assistant – everyday questions and tasks								
Keep answers and suggestions within your access permissions	✓	✓	✓	✓	✓	✓	–	✓
Confirm changes before they are made	✓	✓	✓	✓	✓	✓	–	✓
HR | base · Payroll – Run your own payroll								
HR | base is built to the Swiss payroll standard Swissdec ELM 6.0 and prepares a filing pack for each recipient.	✓	–	–	–	–	–	–	✓
Your own payroll run with the four-eyes principle: regular, special, advance and correction runs	✓	–	–	–	–	–	–	✓
Withholding tax with the official rates of all cantons, salary certificate (Form 11) with plausibility checks	✓	–	–	–	–	–	–	✓
Salary payment as a pain.001 file for your bank; approved expenses are paid out with the salary	✓	–	–	–	–	–	–	✓
Reporting packages for AHV, FAK, UVG, KTG, BVG and BFS with a control PDF, file or transcription template and instructions	✓	–	–	–	–	–	–	✓
Children in payroll records and child, education and birth allowances based on workplace and FAK entitlement	✓	–	–	–	–	–	–	✓
Short-time work and bad weather: authorisations, lost hours, calculation and reporting packages	✓	–	–	–	–	–	–	✓
Salary garnishment, maintenance assignments and additional payment routes per person	✓	–	–	–	–	–	–	✓
Pay salaries in EUR: CHF payroll with exchange rate and euro payment order	✓	–	–	–	–	–	–	✓
Maternity and paternity leave as absences; record income compensation (EO/maternity) as a wage type	✓	–	–	–	–	–	–	✓

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What’s included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
HR | base · Payroll – Run your own payroll								
Track accident reports as tasks with insurer, reporting status, reference and completion	✓	–	–	–	–	–	–	✓
Salary changes effective from a specified date and salary history in personnel records	✓	–	–	–	–	–	–	✓
Organisation chart in KMU | base for all apps: reporting lines, departments, positions and roles – drives approvals, team view and permissions, the same in QMS | base	✓	–	–	–	–	–	–	✓
Payroll export as CSV or Excel with freely selectable columns; condensed payroll journal for common Swiss accounting programs, for large ERP systems as an import file (set up with your partner) or posted directly in Finance | base	✓	–	–	–	–	–	–	✓
Connection to your payroll software: master data, joiners and leavers, hours and absences	✓	–	–	–	–	–	–	✓
Record recurring pay items per employee and carry them automatically into the applicable payroll run.	✓	–	–	–	–	–	–	✓
Compensation rounds with salary bands, annual department budgets, staged approvals and payroll transfer	✓	–	–	–	–	–	–	✓
Prepare a pay equity review with the Logib data sheet and save the internal assessment as a PDF.	✓	–	–	–	–	–	–	✓
HR | base · Time recording – Clock in and out where you work								
Clock in and out in the browser, employee app or on a shared tablet. Sign in at the terminal with a badge, name or personnel number.	✓	–	–	–	–	–	–	✓
Clocking profiles per company, location, department or person: permitted channels, location sharing, geofence around the depot and construction site	✓	–	–	–	–	–	–	✓

KMU | base

What’s included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
HR | base · Time recording – Clock in and out where you work								
Project and construction site allocation, target working time models (including fixed hours per weekday without a shift plan), balances, statutory overtime under the Labour Act (ArG) and National Collective Labour Agreement for construction (LMV)	✓	–	–	–	–	–	–	✓
Core hours: anyone leaving earlier or arriving later is taken straight to a time-off-in-lieu request when clocking; flexitime applies outside core hours	✓	–	–	–	–	–	–	✓
Forgotten clock-outs are detected: the time clock asks and suggests the missing entry	✓	–	–	–	–	–	–	✓
Break rules under the Labour Act (ArG), tolerances and rounding, recording lateness	✓	–	–	–	–	–	–	✓
Corrections via logged requests, month-end closing with confirmation, live “Who’s here” overview	✓	–	–	–	–	–	–	✓
Fraud protection at the terminal: NFC or QR badge with PIN, badges printed as cards and a photo record when clocking – encrypted, deleted after a set period, viewable only under the four-eyes principle	✓	–	–	–	–	–	–	✓
HR | base · Absences – Coordinate absences								
Annual leave, illness, accident, military service, further training; requests with approval	✓	–	–	–	–	–	–	✓
Leave allowances and remaining leave, half days (morning or afternoon), public holidays, team calendar	✓	–	–	–	–	–	–	✓
Rules such as a medical certificate from day X, cover arrangements, carry-over	✓	–	–	–	–	–	–	✓
Hourly absences, e.g. “doctor’s appointment from 3 pm” – counted against target hours, balance and leave account	✓	–	–	–	–	–	–	✓

KMU | base

What’s included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
HR | base · Absences – Coordinate absences								
Request time off in lieu for a full day, half day or by the hour; it is deducted from the time balance, which is shown in the request	✓	–	–	–	–	–	–	✓
“Who approves”: set per person or department who approves absences, time off in lieu, time corrections and expenses – with a deputy during absences	✓	–	–	–	–	–	–	✓
Request leave, submit missing time entries, update personal details and claim expenses in one place. Track each request as it progresses. Leave requests can go through multiple approval stages.	✓	–	–	–	–	–	–	✓
Managers can see overlapping leave dates, decide on requests individually or in batches, and ask for more information within the request.	✓	–	–	–	–	–	–	✓
HR | base · People and organisation – All personnel details together								
Digital personnel file with all master data and contract details, status (upcoming start, active, upcoming departure, left)	✓	–	–	–	–	–	–	✓
Groups of companies: multiple companies under one account, departments and roles per company, managers and teams	✓	–	–	–	–	–	–	✓
Roles and permissions: administration, HR, managers, employees; managers only see their own team	✓	–	–	–	–	–	–	✓
Document storage per person with categories, protected downloads, read receipts	✓	–	–	–	–	–	–	✓
Access log under the FADP: who viewed or changed which personal data and when	✓	–	–	–	–	–	–	✓
The employee portal brings together personal details, documents, payslips and messages. Employees can request changes to their details for approval.	✓	–	–	–	–	–	–	✓

KMU | base

What’s included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
HR | base · People and organisation – All personnel details together								
Emergency sheet with several emergency contacts per person	✓	–	–	–	–	–	–	✓
Residence permit with expiry date and timely reminder	✓	–	–	–	–	–	–	✓
Edit employee details, emergency contacts and contract terms directly in the relevant section of the personnel record.	✓	–	–	–	–	–	–	✓
See communications, correspondence and conversations linked to the employee. Filter by type or date, open the original record and add a note if needed.	✓	–	–	–	–	–	–	✓
Find meetings, decisions and read receipts in the personnel file’s communications history.	✓	–	–	–	–	–	–	✓
HR | base · Employee app (iOS and Android) – Handle HR on the go								
Clock in with location and offline, Face ID before clocking	✓	–	–	–	–	–	–	✓
Work schedule, leave requests and balances	✓	–	–	–	–	–	–	✓
Payslips and documents, protected with Face ID or fingerprint	✓	–	–	–	–	–	–	✓
Messages with push and surveys	✓	–	–	–	–	–	–	✓
Invite employees to the app by SMS, even without a company email	✓	–	–	–	–	–	–	✓
Scanner for inventory, receipts and documents	✓	–	–	–	–	–	–	✓
Request hourly absences, time off in lieu and time corrections	✓	–	–	–	–	–	–	✓
Sales on the go: contacts, pipeline, deals and leads	✓	–	–	–	–	–	–	✓
QMS on the go: checks, HACCP readings, actions and required reading	✓	–	–	–	–	–	–	✓
Complete Docu approvals with a document preview	✓	–	–	–	–	–	–	✓

KMU | base

What’s included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
HR | base · Employee app (iOS and Android) – Handle HR on the go								
Terminal app for tablets with NFC badges	✓	–	–	–	–	–	–	✓
Review and approve compensation rounds for your team	✓	–	–	–	–	–	–	✓
HR | base · Applicant management – Make vacancies visible								
Careers page per company in the HR | base look with a job finder – with your logo, colour, images and videos; as a link, QR code or embedded in your website	✓	–	–	–	–	–	–	✓
Publish on jobs.ch and jobup.ch, structured data for search engines	✓	–	–	–	–	–	–	✓
Application form with supporting documents, acknowledgement of receipt, duplicate detection	✓	–	–	–	–	–	–	✓
Track, filter and sort applications in a list or on a Kanban board for one vacancy or all vacancies. Keep ratings, notes, interview plans and response templates with each application.	✓	–	–	–	–	–	–	✓
Talent pool with consent, automatic deletion periods (FADP)	✓	–	–	–	–	–	–	✓
One click from “hired” to the personnel file with an onboarding checklist	✓	–	–	–	–	–	–	✓
Request a position from the org chart, review its budget and workload, and obtain approval from HR and executive management or finance. Approval creates a job ad draft with suggested criteria.	✓	–	–	–	–	–	–	✓
Applicants upload a CV or profile PDF from their phone, check the prefilled details and answer short screening questions that feed into matching for the job.	✓	–	–	–	–	–	–	✓
Extract the full CV, check each detail against its source and filter by skills, languages or experience.	✓	–	–	–	–	–	–	✓

KMU | base

What’s included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
HR | base · Onboarding and offboarding – A good start								
Automatic checklists for joining and leaving, variants for management	✓	–	–	–	–	–	–	✓
Standard template for Swiss SMEs, fully customisable (items, roles, due dates, conditions, sub-items)	✓	–	–	–	–	–	–	✓
“What applies?”: construction, driver, permit, withholding tax and work equipment determine the tasks	✓	–	–	–	–	–	–	✓
Responsibilities (HR, managers, IT, finance, executive management, stores) with due dates and reminders	✓	–	–	–	–	–	–	✓
Pending tasks overview: overdue, this week, next week; consolidated email to role holders	✓	–	–	–	–	–	–	✓
Email templates for managers, stores, pension funds and new employees; send directly from HR | base	✓	–	–	–	–	–	–	✓
HR | base · Shift and workforce scheduling – Assign teams where they fit								
Weekly schedule by person and work location/construction site, daily and monthly views	✓	–	–	–	–	–	–	✓
Shift templates, copy a week, staffing requirements per assignment and open assignments	✓	–	–	–	–	–	–	✓
Qualifications with expiry dates (e.g. driving licence, forklift, crane) as assignment requirements	✓	–	–	–	–	–	–	✓
Traffic-light conflict indicators: absence, 11 h rest period, maximum working hours, double bookings	✓	–	–	–	–	–	–	✓
Publish with push notifications to those affected, swaps and applications for open assignments, availability	✓	–	–	–	–	–	–	✓
Target hours feed directly into time recording	✓	–	–	–	–	–	–	✓

What’s included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
HR | base · Shift and workforce scheduling – Assign teams where they fit								
Areas per site (e.g. till, pool, restaurant) with demand and coverage per area; assign people to several areas and several times on the same day, including split shifts	✓	–	–	–	–	–	–	✓
Mandatory reasons when clocking, with a grace margin: deviations from the plan or core hours and extra time are explained, and managers decide how they count	✓	–	–	–	–	–	–	✓
Overtime or flexitime account per working time model: adjustable supplement when paid out, compensation as time off	✓	–	–	–	–	–	–	✓
Reports per area: scheduled and required hours, open slots, staff lent from other areas and hours clocked	✓	–	–	–	–	–	–	✓
HR | base · Contracts and documents – From record to document								
Employment contract (monthly and hourly pay, management, construction under the National Collective Labour Agreement for construction (LMV), driver, fixed-term) with live preview and checklist	✓	–	–	–	–	–	–	✓
Job description with text blocks for each role and department	✓	–	–	–	–	–	–	✓
BVG (occupational pensions) enrolment notification, receipts for work equipment (issue/return), parking permit, checklists as PDF files	✓	–	–	–	–	–	–	✓
Export as PDF and Word files with company letterhead; digital signature	✓	–	–	–	–	–	–	✓
HR | base · Swiss law built in – Keep track of deadlines in time								
Probation, notice periods by year of service (Art. 335c CO), earliest leaving date, protected periods during illness/accident (Art. 336c CO)	✓	–	–	–	–	–	–	✓
Work anniversaries and probation reviews scheduled automatically	✓	–	–	–	–	–	–	✓

KMU | base

What’s included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
HR | base · Swiss law built in – Keep track of deadlines in time								
National Collective Labour Agreement for construction (LMV)/collective labour agreement (CLA): pay grades, minimum wage checks, annual working hours, construction expenses	✓	–	–	–	–	–	–	✓
Annual leave and public holiday pay for hourly staff, 13th-month salary, NBU/KTG (non-occupational accident and daily sickness benefits insurance) allocation, BVG (occupational pensions), withholding tax workflows	✓	–	–	–	–	–	–	✓
Companies with or without personnel regulations (contract under the CO)	✓	–	–	–	–	–	–	✓
HR | base · Development – Structure your conversations								
Employee appraisal with self-assessment and assessment by others, goals, meeting record	✓	–	–	–	–	–	–	✓
Probation review as a structured appraisal	✓	–	–	–	–	–	–	✓
HR | base · Communication – Reach the right people								
Messages to everyone, companies, departments or selected people, with attachments and read receipts	✓	–	–	–	–	–	–	✓
Push notifications in the app	✓	–	–	–	–	–	–	✓
Send emails using your own domain or Microsoft 365	✓	–	–	–	–	–	–	✓
Messages also by SMS to employees without email	✓	–	–	–	–	–	–	✓
Schedule announcements, see who has read them and carry availability responses into your shift plan.	✓	–	–	–	–	–	–	✓
HR | base · Platform – Your company’s own identity								
Company logo and colour	✓	–	–	–	–	–	–	✓

KMU | base

What’s included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
HR | base · Platform – Your company’s own identity								
Groups of companies: multiple companies under one account with departments, roles, managers and teams per company	✓	–	–	–	–	–	–	✓
Public REST-API and integrations	✓	–	–	–	–	–	–	✓
Analyse headcount, full-time equivalents, age, length of service and absences by company or department. Set your own thresholds to highlight exceptions and click through to the relevant employee list.	✓	–	–	–	–	–	–	✓
Track staff turnover and statutory overtime.	✓	–	–	–	–	–	–	✓
Check pay equality with an analysis using the method of the Swiss Confederation’s standard analysis tool. Prepare the data sheet and keep the report in the history.	✓	–	–	–	–	–	–	✓
Fast, modern interface on desktop, tablet and mobile	✓	–	–	–	–	–	–	✓
Requests and tickets to teams such as IT, HR, finance, QMS or facilities – across all apps, with queues, due dates and conversion into tasks.	✓	–	–	–	–	–	–	✓
Four languages, light and dark, with its own colour scheme for each app	✓	–	–	–	–	–	–	✓
Arrange the cards for clocking in, holiday, absences and team approvals on your HR home page.	✓	–	–	–	–	–	–	✓
HR | base · Team terminal – One tablet. A clear start								
Clock in and out on the web, in the app and at the team terminal (wall-mounted tablet, login with NFC badge, name list, QR badge or staff number)	✓	–	–	–	–	–	–	✓
Login with an NFC badge (built-in, USB or Bluetooth reader), from the name list by department, with a QR badge or staff number – always with a PIN	✓	–	–	–	–	–	–	✓

What's included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
HR | base · Team terminal – One tablet. A clear start								
Login methods, language and who may clock in are set per terminal; changes apply within a minute	✓	–	–	–	–	–	–	✓
Terminal app for tablets or kiosk mode in the browser; before login the terminal shows no personal data	✓	–	–	–	–	–	–	✓
Pair the terminal with a code, block a lost device immediately; register NFC badges in the personnel file or at the terminal	✓	–	–	–	–	–	–	✓
HR | base · Employment reference tool – References on a solid foundation								
Employment reference tool (Art. 330a CO): interim and final references, confirmation of employment, text blocks using Swiss employment reference wording	✓	–	–	–	–	–	–	✓
HR | base · Employee appraisal – Good conversations start with clarity								
Run review cycles with templates by role, weighted criteria and goals, reminders and progress tracking.	✓	–	–	–	–	–	–	✓
HR | base · Employee surveys – Listening is part of day-to-day HR								
Surveys with target groups and closing dates, optionally anonymous; five question types, response-rate analysis and CSV export.	✓	–	–	–	–	–	–	✓
HR | base · Shared checklists – One list per topic that everyone ticks off together – in every app								
Checklists empty, from sample templates or your own templates	✓	–	–	–	–	–	–	✓
Items with sub-items, due date and responsible person	✓	–	–	–	–	–	–	✓
Reorder by dragging, progress display	✓	–	–	–	–	–	–	✓
Share with people, teams or roles: edit, only tick off or only read	✓	–	–	–	–	–	–	✓

KMU | base

What's included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
HR | base · Shared checklists – One list per topic that everyone ticks off together – in every app								
"Done by" with date, changes by others without reloading	✓	–	–	–	–	–	–	✓
Comments with @-mentions and a history per list	✓	–	–	–	–	–	–	✓
Assigned items under "My tasks" with reminders	✓	–	–	–	–	–	–	✓
Optionally linked to a person, deal or customer and to documents from Docu | base	✓	–	–	–	–	–	–	✓
HR | base · Payslips in the app – Your payslip straight to the app								
Payslips and salary certificates directly in the app, with push notifications and read receipts	✓	–	–	–	–	–	–	✓
Finance | base · Sales: from quote to invoice – Quote, order, delivery note and invoice in one chain – with QR invoices, recurring billing, subscriptions, incoming payments and dunning								
Create Swiss QR bills in CHF or EUR with a compatible bank account. Export documents in four languages and in CHF, EUR or USD as archival PDFs.	–	✓	–	–	–	–	–	✓
Conversion along the chain: quote to order or invoice, order to delivery note, picking list or invoice, delivery note to invoice.	–	✓	–	–	–	–	–	✓
Subscriptions with plans, seats, trial period, payment links and promo codes.	–	✓	–	–	–	–	–	✓
Read camt.053 and camt.054 bank files: QR and RF references are matched automatically, part payments stay visible.	–	✓	–	–	–	–	–	✓
Partial invoice by quantity, deposit invoice as a percentage and final invoice with deposits deducted.	–	✓	–	–	–	–	–	✓
Invoices without a QR payment part too: with the IBAN and BIC of an account in any country, with free-form account details or with PayPal only.	–	✓	–	–	–	–	–	✓

What’s included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
Finance | base · Sales: from quote to invoice – Quote, order, delivery note and invoice in one chain – with QR invoices, recurring billing, subscriptions, incoming payments and dunning								
Templates with logo, accent colour, address window on the left or right and header and footer texts per language.	–	✓	–	–	–	–	–	✓
Sending by email immediately or scheduled in the customer’s local time, bulk sending and a sending log.	–	✓	–	–	–	–	–	✓
After review and approval, you send invoices via eBill through your own Pingen account straight to your customers’ e-banking and explicitly choose letter delivery as a fallback when needed.	–	✓	–	–	–	–	–	✓
Customer portal with your logo and colour, open balances and documents; accept quotes, optionally with a signature. Customers pay online in the customer portal with PayPal or, with a configured payment service and your company’s corresponding contract, by card or TWINT. Each payment is posted once. The QR invoice on the document is used for e-banking transfers.	–	✓	–	–	–	–	–	✓
Recurring billing for invoices and orders, weekly to yearly, sent automatically or as a draft for review.	–	✓	–	–	–	–	–	✓
Dunning with payment reminder, 1st and 2nd reminder, deadlines, optional fees and optional default interest; before a reminder is sent, the preview shows level, fee, new deadline and recipient. Dunning runs and a dunning block per customer.	–	✓	–	–	–	–	–	✓
Partial returns: take back individual lines and quantities with a credit note and booking back into stock; the backorder list shows what is still to be delivered from open orders.	–	✓	–	–	–	–	–	✓
Cash discount on customer and supplier invoices: discount terms on the document, payment with the discount posted and VAT corrected.	–	✓	–	–	–	–	–	✓

What’s included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
Finance | base · Sales: from quote to invoice – Quote, order, delivery note and invoice in one chain – with QR invoices, recurring billing, subscriptions, incoming payments and dunning								
Pro forma invoices: without posting and without revenue, converted into a normal invoice if needed.	–	✓	–	–	–	–	–	✓
Order confirmation created automatically when a quote is accepted, set per company as a draft or issued directly; the chain through to the invoice also works without Sales | base.	–	✓	–	–	–	–	–	✓
Link quotes to deals from Sales | base.	–	✓	–	–	–	–	–	✓
Reverse a wrongly recorded manual payment with a reason; the receivable becomes open again.	–	✓	–	–	–	–	–	✓
Create recurring invoices directly from the customer, with a pre-filled series.	–	✓	–	–	–	–	–	✓
Invoice, quote or reminder by post: you check the detected address and the confirmed price, add a cover letter if you wish and record the handover to the post; you pay with prepaid credit or on the next monthly invoice.	–	✓	–	–	–	–	–	✓
What your customers do in the customer area (acceptance, payment, document, change of address) shows up in the bell and under “To do”; the history is on the document.	–	✓	–	–	–	–	–	✓
Set a bank account with a different payee for individual customers and preview the payment details before saving.	–	✓	–	–	–	–	–	✓
The billing overview shows issued, open and overdue invoices, plus orders, work reports and won deals still to be billed. Each figure opens its matching list.	–	✓	–	–	–	–	–	✓

What’s included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
Finance | base · Accounting – Accounting under Swiss law: seven chart-of-accounts templates, simple bookkeeping, a complete journal, cost centres and foreign currencies								
Six chart-of-accounts templates – SME with or without VAT, sole proprietorship with or without VAT, association, micro business – with account names in German, French, Italian and English, adaptable per company.	–	✓	–	–	–	–	–	✓
Import your own chart of accounts as CSV or Excel, with a trial run and an error report per line; export in the same format.	–	✓	–	–	–	–	–	✓
Simple bookkeeping under Art. 957 para. 2 CO for sole proprietorships, associations and micro businesses: income, expenditure and transfers between cash and bank with category and receipt; the offsetting entry is created automatically.	–	✓	–	–	–	–	–	✓
Consecutively numbered journal for each company, linked to the receipt.	–	✓	–	–	–	–	–	✓
Compound postings with any number of debit and credit lines; the totals must match.	–	✓	–	–	–	–	–	✓
Reversal instead of editing: postings are never overwritten or deleted.	–	✓	–	–	–	–	–	✓
Hash chain across the journal, designed to meet the requirements of the GeBüV (Swiss accounting records ordinance), with a check on the journal page.	–	✓	–	–	–	–	–	✓
Account ledger with opening and closing balance, plus trial balance.	–	✓	–	–	–	–	–	✓
Cost centres for each company with result by cost centre.	–	✓	–	–	–	–	–	✓
Foreign currency postings with an entered exchange rate and presentation in CHF under CO Art. 958d.	–	✓	–	–	–	–	–	✓
Several companies in one account, and cash count with difference posting.	–	✓	–	–	–	–	–	✓

What's included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
Finance | base · Accounting – Accounting under Swiss law: seven chart-of-accounts templates, simple bookkeeping, a complete journal, cost centres and foreign currencies								
Accruals and deferrals for transitory assets and liabilities with automatic reversal in the following period; they can be cancelled.	–	✓	–	–	–	–	–	✓
Exchange rate and CHF equivalent directly on the sales document.	–	✓	–	–	–	–	–	✓
Monthly budgets by account, cost centre or project; actual comparison for accounts and projects.	–	✓	–	–	–	–	–	✓
Cash flow forecast with expected receipts and payments.	–	✓	–	–	–	–	–	✓
Retrieve pain.002 status reports for submitted payment files through the configured bank connection; submission and execution remain separate states.	–	✓	–	–	–	–	–	✓
Finance | base · VAT return – Prepare VAT by form box and produce eCH-0217 XML ready to upload to the FTA portal								
VAT status for each company from a chosen date: registered or not, VAT number with UID check digit validation.	–	✓	–	–	–	–	–	✓
Effective method or net tax rate, agreed or received consideration, reporting period.	–	✓	–	–	–	–	–	✓
VAT rates with validity dates: each period uses the rates that applied at the time.	–	✓	–	–	–	–	–	✓
VAT codes for output tax, input tax and acquisition tax.	–	✓	–	–	–	–	–	✓
VAT journal with all tax-relevant postings for the period.	–	✓	–	–	–	–	–	✓
Return by FTA form box with posted-versus-form reconciliation.	–	✓	–	–	–	–	–	✓
eCH-0217 XML validated against the XSD schema, ready to upload to the FTA portal; a copy stays in the archive.	–	✓	–	–	–	–	–	✓

What's included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
Finance | base · VAT return – Prepare VAT by form box and produce eCH-0217 XML ready to upload to the FTA portal								
Period closing with a balancing posting.	–	✓	–	–	–	–	–	✓
Corrective return as the difference from the original return.	–	✓	–	–	–	–	–	✓
Display of the 60-day deadline.	–	✓	–	–	–	–	–	✓
Finance | base · Purchasing, bank and expenses – Purchase orders, recurring expenses, approval and payment runs, bank reconciliation with camt files and expenses with approval								
Bank reconciliation: import bank statements and match transactions to open invoices. Previously imported transactions are recognised.	–	✓	–	–	–	–	–	✓
Proposals by reference, document number, IBAN, name and amount, including part and bulk payments, with a confidence percentage.	–	✓	–	–	–	–	–	✓
Purchase orders with lines, delivery date and status: draft, ordered, partly delivered, delivered, invoiced or cancelled.	–	✓	–	–	–	–	–	✓
Conversion into the supplier invoice as an open payables item, with a warning if it differs from the purchase order.	–	✓	–	–	–	–	–	✓
Recurring expenses monthly, quarterly, half-yearly or yearly; due supplier invoices are created at the click of a button.	–	✓	–	–	–	–	–	✓
Approval of supplier invoices before payment, blocking with a reason and four-eyes principle that can be set per company: one central default with exceptions per company. Anyone with sole authority approves alone; the exception is logged.	–	✓	–	–	–	–	–	✓
Payment run: select due, approved items, approve and create the pain.001 file; it is kept in the archive.	–	✓	–	–	–	–	–	✓
Rules based on the booking text with offsetting account, posted automatically if you wish.	–	✓	–	–	–	–	–	✓

What’s included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
Finance | base · Purchasing, bank and expenses – Purchase orders, recurring expenses, approval and payment runs, bank reconciliation with camt files and expenses with approval								
Expenses with a receipt as PDF or photo, eight categories, foreign currency with exchange rate and VAT rate; without a receipt up to an adjustable amount.	–	✓	–	–	–	–	–	✓
Approval by the line manager or accounting, posting as an open item for the payment run and an expense report per person, category and month.	–	✓	–	–	–	–	–	✓
Requests and tickets to teams such as IT, HR, finance, QMS or facilities – across all apps, with queues, due dates and conversion into tasks.	–	✓	–	–	–	–	–	✓
Expenses can be paid out with the salary; expense decisions send a notification to the person who submitted them.	–	✓	–	–	–	–	–	✓
Import credit card statements, attach receipts and post business expenses. Mark personal expenses separately.	–	✓	–	–	–	–	–	✓
Assign your bank’s company cards and set limits and expense rules. Import transactions, match receipts from the employee app automatically, request missing receipts as tasks and post expenses with VAT.	–	✓	–	–	–	–	–	✓
Finance | base · Incoming invoices – Upload or email supplier invoices: Finance | base reads the QR code and proposes the posting								
Digital invoice capture: extract the amount, supplier details and due date from invoice PDFs and review them before posting.	–	✓	–	–	–	–	–	✓
Intake by upload or scan with file type check from content and virus scan; the original goes straight into the archive, built to the requirements of the GeBüV.	–	✓	–	–	–	–	–	✓
Posting proposal with supplier, account, VAT code, cost centre and due date, plus a confidence percentage.	–	✓	–	–	–	–	–	✓

What's included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
Finance | base · Incoming invoices – Upload or email supplier invoices: Finance | base reads the QR code and proposes the posting								
Your own inbound address on financebase.ch, the Finance | base domain. Find the exact address in invoice inbox settings; duplicate invoices create a single entry.	–	✓	–	–	–	–	–	✓
Swiss QR code reading – from image, vector graphic or photo – with validation of IBAN, reference and SCOR reference.	–	✓	–	–	–	–	–	✓
"OK", "Always post like this" or "Change": rules per supplier, automatic up to an amount limit if you wish; Finance | base learns from your decisions.	–	✓	–	–	–	–	–	✓
Rules with a distinguishing feature and split across several accounts when a supplier invoices different things.	–	✓	–	–	–	–	–	✓
Duplicate detection by file, reference and amount, invoice number, and supplier, amount and date.	–	✓	–	–	–	–	–	✓
AI account assignment proposal at the click of a button – only when you ask for it.	–	✓	–	–	–	–	–	✓
pain.001 payment file for your e-banking from open payables; accounts payable ledger with payment recording.	–	✓	–	–	–	–	–	✓
Finance | base · Stock – Stock by warehouse and bin, reservations, picking and inventory counts; valuation by moving average, FIFO or standard cost								
Several locations with address and bins; each new location gets the bin "HAUPT".	–	✓	–	–	–	–	–	✓
Stock keeping per product with minimum stock, target stock, minimum order quantity, supplier, lead time and default bin.	–	✓	–	–	–	–	–	✓
Stock list with on hand, reserved, available and stock value at moving average cost; items below minimum stock are flagged.	–	✓	–	–	–	–	–	✓

What’s included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
Finance | base · Stock – Stock by warehouse and bin, reservations, picking and inventory counts; valuation by moving average, FIFO or standard cost								
Movements: receipt with cost price, issue, transfer between bins, correction and stocktake – traceable per item with their source.	–	✓	–	–	–	–	–	✓
Orders reserve; delivery notes and invoices book the issue when issued, and a cancellation credit note reverses it.	–	✓	–	–	–	–	–	✓
Picking: one pick sheet per issued picking list, sorted by bin, with actual quantities, ready to print.	–	✓	–	–	–	–	–	✓
Stocktaking per location with count sheet and reference date; differences are booked on closing.	–	✓	–	–	–	–	–	✓
Sets of several items: reservation, pick sheet and issue run through the components.	–	✓	–	–	–	–	–	✓
Replenishment with order proposals for items whose available stock falls below minimum stock.	–	✓	–	–	–	–	–	✓
Stock valuation by moving average, FIFO or standard price, stock value at a reference date and the change in inventory posted at closing with one click.	–	✓	–	–	–	–	–	✓
Inventory analyses: ABC classes by consumption value, turnover and coverage per item, plus slow movers with the stock value they tie up.	–	✓	–	–	–	–	–	✓
Blind count in the stocktake: whoever counts sees neither the target nor the difference; review and closing need the “Manage stock” right.	–	✓	–	–	–	–	–	✓
Finance | base · Receivables and open items – Open items per customer, part payments and ageing analysis: see what is outstanding and for how long								
Open items per customer.	–	✓	–	–	–	–	–	✓
Part payments with visible remaining balance.	–	✓	–	–	–	–	–	✓
Ageing analysis: not due, 1–30, 31–60, 61–90 and over 90 days.	–	✓	–	–	–	–	–	✓

What’s included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
Finance | base · Receivables and open items – Open items per customer, part payments and ageing analysis: see what is outstanding and for how long								
Account statement per customer on screen.	–	✓	–	–	–	–	–	✓
Account statement per supplier on screen.	–	✓	–	–	–	–	–	✓
Open and overdue receivables in the financial overview.	–	✓	–	–	–	–	–	✓
Write off a final bad debt on an outstanding CHF invoice with a reason and journal entry.	–	✓	–	–	–	–	–	✓
Finance | base · Projects – Projects with customer, budget, tasks, milestones and hourly rates – invoice hours and fixed prices directly								
Projects with number, customer, cost centre, status and billing by time and materials, fixed price or internal.	–	✓	–	–	–	–	–	✓
Budget in hours or CHF with the share already invoiced.	–	✓	–	–	–	–	–	✓
Task board with the columns Open, In progress, Review and Done; tasks with due date, estimate, labels and assignee.	–	✓	–	–	–	–	–	✓
Tasks optionally shown in the customer portal; the customer marks tasks awaiting their action as done.	–	✓	–	–	–	–	–	✓
Milestones with due date and amount; for fixed-price projects a draft invoice in one click.	–	✓	–	–	–	–	–	✓
Activities such as consulting or installation, each with a service item, for all projects.	–	✓	–	–	–	–	–	✓
Hourly rates per person, per activity or both, valid from a date.	–	✓	–	–	–	–	–	✓
Time recording in the project, with task, activity and a “Billable” flag.	–	✓	–	–	–	–	–	✓
With HR | base: project hours from time recording clock-ins, evaluated up to yesterday.	–	✓	–	–	–	–	–	✓

What’s included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
Finance | base · Projects – Projects with customer, budget, tasks, milestones and hourly rates – invoice hours and fixed prices directly								
Invoicing hours: draft invoice to the project customer, rounded up to the quarter hour, per person, per day or as a total.	–	✓	–	–	–	–	–	✓
Finance | base · Production – Bills of materials, operations and production orders in one app								
Multi-level bills of materials with operations and manufacturing costs from materials and labour.	–	✓	–	–	–	–	–	✓
Production orders with material consumption and completion into stock at actual cost.	–	✓	–	–	–	–	–	✓
Sub-orders for missing assemblies and production suggestions based on minimum stock.	–	✓	–	–	–	–	–	✓
Create production orders with a quantity, due date and destination location.	–	✓	–	–	–	–	–	✓
Create sub-orders for assemblies that are low on stock.	–	✓	–	–	–	–	–	✓
Get production suggestions when stock falls below its minimum.	–	✓	–	–	–	–	–	✓
Print manufacturing paperwork for each order.	–	✓	–	–	–	–	–	✓
Finance | base · Service reports and service orders – Plan service orders and see them on the roster, record the service report on site, have the customer sign it and invoice in one go								
Service orders in the ERP with number, customer or project, date (also over several days), place of work, contact person and description; assignment to one or more people.	–	✓	–	–	–	–	–	✓
Assigned service orders appear on the staff roster, also in the app; planning shows conflicts with absences and other jobs as a warning.	–	✓	–	–	–	–	–	✓
“My orders” for staff, who set the status themselves: in progress, done.	–	✓	–	–	–	–	–	✓

What’s included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
Finance | base · Service reports and service orders – Plan service orders and see them on the roster, record the service report on site, have the customer sign it and invoice in one go								
Own orders: staff can also create an order themselves, on the web and in the app; the office checks it and assigns customer and project before it is invoiced.	–	✓	–	–	–	–	–	✓
Report for a service order, a project or a customer; your company sets whether the signature is mandatory, whether material is drawn from stock and how travel time and kilometres are invoiced.	–	✓	–	–	–	–	–	✓
Report with working time per activity, travel time, kilometres, description of the work, internal note and photos.	–	✓	–	–	–	–	–	✓
Spare parts and material from the item master or as free text – delivered, installed, replaced or used up –, drawn from the vehicle or storage location and, for tracked items, with serial number or batch.	–	✓	–	–	–	–	–	✓
Flat fees as a separate block, with fixed prices from the item master.	–	✓	–	–	–	–	–	✓
Recording in the KMU | base app, even without a network; the data is sent once the connection is back.	–	✓	–	–	–	–	–	✓
Customer signature on the device with name and time; without a signature only with a reason, if you allow it.	–	✓	–	–	–	–	–	✓
Report PDF in letter style; the signed version stays unchanged and, if you like, is emailed to the customer.	–	✓	–	–	–	–	–	✓
Approval by the office, rejection with a reason; corrections after closing appear in the log, stock differences are posted afterwards.	–	✓	–	–	–	–	–	✓
“To invoice”: approved reports per customer and order, as a single or combined invoice with the report PDFs attached.	–	✓	–	–	–	–	–	✓

What’s included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
Finance | base · Service reports and service orders – Plan service orders and see them on the roster, record the service report on site, have the customer sign it and invoice in one go								
In the AI chat you ask about your own jobs and have a report draft prepared; it is saved only after you confirm.	–	✓	–	–	–	–	–	✓
Finance | base · Item master – Products and services with price, unit, VAT code and revenue account – entered once, ready in every document								
Type “Product” or “Service” with item number, description and details.	–	✓	–	–	–	–	–	✓
List price per unit excluding VAT, with units such as hrs, pcs or flat rate.	–	✓	–	–	–	–	–	✓
VAT code per item: standard rate, reduced rate, accommodation, zero-rated or exempt.	–	✓	–	–	–	–	–	✓
Category, revenue account and purchase price per item.	–	✓	–	–	–	–	–	✓
Customer prices with discount and the customer’s item number; the customer price takes precedence over the list price.	–	✓	–	–	–	–	–	✓
Custom fields for items: text, number, date or selection.	–	✓	–	–	–	–	–	✓
Import with the import assistant from CSV or Excel files.	–	✓	–	–	–	–	–	✓
Search by number, description or category; inactive items are kept but no longer appear in new documents.	–	✓	–	–	–	–	–	✓
Products can optionally be kept in stock and combined into sets of several items.	–	✓	–	–	–	–	–	✓
Variants from attributes such as size and colour – each with its own number, stock and price, master data taken from the main item.	–	✓	–	–	–	–	–	✓
Tiered prices by quantity and customer: customer price, price list, tier, then list price – visible on the document and calculated bindingly when saved.	–	✓	–	–	–	–	–	✓

What's included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
Finance | base · Item master – Products and services with price, unit, VAT code and revenue account – entered once, ready in every document								
Monthly, quarterly and yearly prices on the item; the document and the series suggest the matching price.	–	✓	–	–	–	–	–	✓
Discount as a percentage or a fixed amount, document total rounded to 5 cents.	–	✓	–	–	–	–	–	✓
Margin on the item and on the document line, only for people with the right to manage, and never in the PDF or the customer area.	–	✓	–	–	–	–	–	✓
Sales reports with CSV export; custom units.	–	✓	–	–	–	–	–	✓
Change items with Elin – as always only after your approval.	–	✓	–	–	–	–	–	✓
Finance | base · Budget and liquidity – Plan monthly budgets and expected cash flows								
Record monthly budgets by account, cost centre or project.	–	✓	–	–	–	–	–	✓
Weekly liquidity forecast using open receivables, recurring invoices and scheduled payments.	–	✓	–	–	–	–	–	✓
Record one-off or recurring payments and an opening balance.	–	✓	–	–	–	–	–	✓
Finance | base · Closing and reports – Fixed asset register with straight-line or declining-balance depreciation and disposal; plus guided closing, balance sheet and income statement								
Locking and finalising months.	–	✓	–	–	–	–	–	✓
Year-end closing with balances carried forward to the new year.	–	✓	–	–	–	–	–	✓
Closing trial balance archived as a receipt.	–	✓	–	–	–	–	–	✓
Opening balance sheet from the previous system via CSV – archived and logged.	–	✓	–	–	–	–	–	✓
Balance sheet under CO Art. 959a with prior-year comparison.	–	✓	–	–	–	–	–	✓

What’s included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
Finance | base · Closing and reports – Fixed asset register with straight-line or declining-balance depreciation and disposal; plus guided closing, balance sheet and income statement								
Income statement under CO Art. 959b with prior-year comparison.	–	✓	–	–	–	–	–	✓
Financial overview with cash, result, open and overdue receivables, payables due and VAT deadline.	–	✓	–	–	–	–	–	✓
Export of journal and trial balance as CSV, Excel or tab-delimited text.	–	✓	–	–	–	–	–	✓
Guided interim and year-end closing: checklist per company for the month, quarter, half-year or financial year, open items with a reason, locking with an unchangeable log.	–	✓	–	–	–	–	–	✓
Interim report with prior period, prior year, budget and key figures as a PDF on letterhead or as CSV; when the period is locked, it is archived unchanged.	–	✓	–	–	–	–	–	✓
Reports also for any reporting date; the fiduciary’s comments stay separate.	–	✓	–	–	–	–	–	✓
Accrual and deferral suggestions from service periods and recurring invoices: you confirm, and the reversal on the day after the reporting date happens automatically.	–	✓	–	–	–	–	–	✓
Depreciation per quarter or month; amounts already posted are deducted, and only the remainder is left at year-end.	–	✓	–	–	–	–	–	✓
Fixed asset register with number, acquisition date, cost and residual value, asset and expense accounts and cost centre.	–	✓	–	–	–	–	–	✓
Straight-line depreciation over the useful life or declining-balance depreciation with a rate and a schedule for the coming years.	–	✓	–	–	–	–	–	✓
View acquisition cost, posted depreciation and carrying amount for each asset.	–	✓	–	–	–	–	–	✓

What's included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
Finance | base · Closing and reports – Fixed asset register with straight-line or declining-balance depreciation and disposal; plus guided closing, balance sheet and income statement								
Post the remaining annual depreciation as a collective entry, taking amounts already posted into account.	–	✓	–	–	–	–	–	✓
Post asset disposal or sale with carrying amount, proceeds and gain or loss.	–	✓	–	–	–	–	–	✓
Finance | base · Working with your fiduciary – Your accountant reads, posts and exports directly. All user accounts are included in employee-based pricing								
"Fiduciary" role template with view, post and export.	–	✓	–	–	–	–	–	✓
Accounts can be marked as accountant access.	–	✓	–	–	–	–	–	✓
All user accounts are included. Pricing is based on employees and subscribed apps.	–	✓	–	–	–	–	–	✓
Accountants and invoice entry staff work with their assigned permissions.	–	✓	–	–	–	–	–	✓
Data scope can be limited to specific companies.	–	✓	–	–	–	–	–	✓
Single sign-in; interface and emails in German, French, Italian or English.	–	✓	–	–	–	–	–	✓
See outstanding work per client in the accountancy dashboard and open tasks directly.	–	Accountancy package	–	–	–	–	–	–
Switch between authorised clients using search or the recently used list.	–	Accountancy package	–	–	–	–	–	–
Filter and assign accounting and payroll tasks and deadlines across authorised clients, and set reminders.	–	Accountancy package	–	–	–	–	–	–
Accountancy demo with five fictional clients and a guided tour.	–	Accountancy package	–	–	–	–	–	–

What's included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
Sales | base · Contacts and companies – Companies and people without duplicates – with consent, source and a complete timeline								
Search, filter and link companies and people – with detail view, master data and notes.	–	–	✓	–	–	–	–	✓
Several addresses per contact with a primary address, automatic normalisation and duplicate protection.	–	–	✓	–	–	–	–	✓
Merge contacts with a field preview, exclude or block them.	–	–	✓	–	–	–	–	✓
Tags, including as a bulk action, plus categories and visible source.	–	–	✓	–	–	–	–	✓
Source priority and previous values: you see where a value comes from and what applied before.	–	–	✓	–	–	–	–	✓
Pre-qualification A, B or C with reason, potential column and filter.	–	–	✓	–	–	–	–	✓
Consent per address and purpose, delivery and business blocks, signed unsubscribe and withdrawal.	–	–	✓	–	–	–	–	✓
Timeline per contact with activities, deals, sends and consents.	–	–	✓	–	–	–	–	✓
Accept or reject AI field suggestions; UID lookup with sources.	–	–	✓	–	–	–	–	✓
Adopt the standard pipeline with one click; duplicate warning when creating a company.	–	–	✓	–	–	–	–	✓
Create website contact forms that send enquiries to the CRM as leads or deals, depending on the form.	–	–	✓	–	–	–	–	✓
Sales | base · Pipeline and deals – Every deal with stage, value and history – as a Kanban board or list, accurate to the centime								
View the sales pipeline as a Kanban board or list. See each deal's stage and move it forward when it progresses.	–	–	✓	–	–	–	–	✓
Offer in the deal built from products with several line items – one-off, monthly or annual, with a discount per line and on the whole offer.	–	–	✓	–	–	–	–	✓

KMU | base

What’s included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
Sales | base · Pipeline and deals – Every deal with stage, value and history – as a Kanban board or list, accurate to the centime								
Handover to Finance | base: the order creates an invoice for one-off items and a series for each billing cycle, exactly once.	–	–	✓	–	–	–	–	✓
Create, edit and delete deals – with version checks so that simultaneous changes overwrite nothing.	–	–	✓	–	–	–	–	✓
Stage history per deal and undo of the last stage change.	–	–	✓	–	–	–	–	✓
Won or lost, with a mandatory loss reason.	–	–	✓	–	–	–	–	✓
Won deals split into invoiced and uninvoiced.	–	–	✓	–	–	–	–	✓
Hot flag with note and your own operational stages.	–	–	✓	–	–	–	–	✓
Totals per currency, accurate to the centime.	–	–	✓	–	–	–	–	✓
Set up pipeline, stages, loss reasons and sources yourself.	–	–	✓	–	–	–	–	✓
Custom fields on deals in eleven types, also with formulas.	–	–	✓	–	–	–	–	✓
Continue quotes from the deal in Finance | base and generate PDFs there with your own logo and document design.	–	–	✓	–	–	–	–	✓
Sales | base · Follow-ups and outreach – Follow up by rule, not by memory – with stop on reply and an emergency stop								
Schedule follow-up email sequences and tailor the templates and timing to each sequence.	–	–	✓	–	–	–	–	✓
Idle lock: follow-ups can be paused and resubmitted.	–	–	✓	–	–	–	–	✓
Stop on reply – even when another person from the same company replies.	–	–	✓	–	–	–	–	✓
A rejection closes the case, a put-off creates a reminder, a meeting request a task.	–	–	✓	–	–	–	–	✓

What's included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
Sales | base · Follow-ups and outreach – Follow up by rule, not by memory – with stop on reply and an emergency stop								
Draft queue for review before sending.	–	–	✓	–	–	–	–	✓
Automatic sending only with a switch, with emergency stop and weekday window.	–	–	✓	–	–	–	–	✓
Daily and per-run caps limit the number of emails.	–	–	✓	–	–	–	–	✓
Quality control of drafts: spacing, salutation, prohibited promises and placeholders.	–	–	✓	–	–	–	–	✓
Outreach waves for first contacts: oldest contacts first, started only by a person.	–	–	✓	–	–	–	–	✓
Protection against a duplicate first contact.	–	–	✓	–	–	–	–	✓
Prepare follow-up drafts in advance and approve them after reviewing a sample.	–	–	✓	–	–	–	–	✓
Send outreach and follow-ups from your own mailbox.	–	–	✓	–	–	–	–	✓
Block companies from future outreach and campaigns.	–	–	✓	–	–	–	–	✓
Track opens and clicks for outreach and follow-up emails.	–	–	✓	–	–	–	–	✓
Sales | base · Newsletters and campaigns – Newsletters that arrive: Outlook-ready templates, recorded consent, honest statistics								
Campaign with sender, distribution list, subject, preview text and HTML and text versions – based on five Outlook-ready templates in four languages.	–	–	✓	–	–	–	–	✓
Newsletter editor with building blocks – heading, text, image, button, divider – and live preview; personal details are inserted with a click.	–	–	✓	–	–	–	–	✓
Distribution list as a tag expression with an exact recipient count, frozen when sending starts.	–	–	✓	–	–	–	–	✓

What’s included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
Sales | base · Newsletters and campaigns – Newsletters that arrive: Outlook-ready templates, recorded consent, honest statistics								
Desktop, mobile and text preview; test send in one click.	–	–	✓	–	–	–	–	✓
Approval tied to the content; scheduling with a date; pause, resume or cancel.	–	–	✓	–	–	–	–	✓
Sending with warm-up plan, throttling and protection against duplicate sending, with live progress.	–	–	✓	–	–	–	–	✓
Bulk sending from the verified sender of your domain (SPF, DKIM and DMARC checked with one click), even to over 100’000 recipients; bounces, complaints and unsubscribes block the address immediately.	–	–	✓	–	–	–	–	✓
Sending only to addresses with recorded consent per purpose; one-click unsubscribe; returns and bounce suppression.	–	–	✓	–	–	–	–	✓
Public newsletter archive.	–	–	✓	–	–	–	–	✓
Statistics: opens raw, automated and adjusted, clicks with link-scanner detection and click targets.	–	–	✓	–	–	–	–	✓
10’000 emails are included per month. Each additional 1’000 emails costs CHF 2.–. Sales | base warns you before the allowance is exhausted.	–	–	✓	–	–	–	–	✓
Social media: plan posts with a pool of topics and publish them directly on your channels; scheduling counts as approval.	–	–	✓	–	–	–	–	✓
Sales | base · Reports – Funnel, win rate and loss reasons – the figures a sales meeting needs								
Sales funnel across all pipeline stages.	–	–	✓	–	–	–	–	✓
Win rate.	–	–	✓	–	–	–	–	✓
Time in stage.	–	–	✓	–	–	–	–	✓
Analysis of loss reasons.	–	–	✓	–	–	–	–	✓

What’s included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
Sales | base · Reports – Funnel, win rate and loss reasons – the figures a sales meeting needs								
Newsletter statistics per campaign and per sender.	–	–	✓	–	–	–	–	✓
Status report in diagnostics.	–	–	✓	–	–	–	–	✓
Data quality check.	–	–	✓	–	–	–	–	✓
Sales | base · Activities and daily desk – Calls, meetings and tasks under control – and exactly one next step for every deal								
Record activities as call, email, meeting, task or note.	–	–	✓	–	–	–	–	✓
Due date and reminder per activity.	–	–	✓	–	–	–	–	✓
Complete with an outcome or postpone to a new time.	–	–	✓	–	–	–	–	✓
Exactly one next step per deal.	–	–	✓	–	–	–	–	✓
Deals without a next step and overdue tasks at a glance.	–	–	✓	–	–	–	–	✓
Daily desk with cases, hot deals, tasks, deals without a step and totals.	–	–	✓	–	–	–	–	✓
Task overview with all open and overdue tasks.	–	–	✓	–	–	–	–	✓
Requests and tickets to teams such as IT, HR, finance, QMS or facilities – across all apps, with queues, due dates and conversion into tasks.	–	–	✓	–	–	–	–	✓
Select requests from the filtered list to approve them, decline them with a reason or defer them together.	–	–	✓	–	–	–	–	✓
Use Next and Back to work through the selected requests one by one.	–	–	✓	–	–	–	–	✓
Check message counts and recipients before approving a send, then see the outcome for each request.	–	–	✓	–	–	–	–	✓
Arrange cards for the pipeline, leads and activities on your personal dashboard.	–	–	✓	–	–	–	–	✓

What's included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
Sales | base · Activities and daily desk – Calls, meetings and tasks under control – and exactly one next step for every deal								
Record or upload a conversation with consent. Swiss AI prepares the transcript, agreements, dated tasks and a follow-up draft to confirm on the deal or contact.	–	–	✓	–	–	–	–	✓
Sales | base · Inbound mail and approval – Incoming emails classified, replies as drafts – only what is approved goes out								
Classify inbound mail: enquiry, rejection, put-off, meeting request, unsubscribe, bounce, erasure request and more.	–	–	✓	–	–	–	–	✓
Private emails are recognised and protected.	–	–	✓	–	–	–	–	✓
Create a contact with its source from an enquiry.	–	–	✓	–	–	–	–	✓
Cases with a ready-made draft reply.	–	–	✓	–	–	–	–	✓
Approval tied to the exact version, with no duplicate sending.	–	–	✓	–	–	–	–	✓
Approval email to management with a single-use link.	–	–	✓	–	–	–	–	✓
Reply in the existing thread, with signature and sender per brand.	–	–	✓	–	–	–	–	✓
The reply language follows the content of the incoming email.	–	–	✓	–	–	–	–	✓
Connect an M365 mailbox and send directly from Sales | base.	–	–	✓	–	–	–	–	✓
M365 mailbox as the Sales inbox: enquiries are classified and prepared as a case with a draft reply; the message content is only loaded when needed.	–	–	✓	–	–	–	–	✓
System addresses per purpose with a set-up page and IMAP inbound.	–	–	✓	–	–	–	–	✓
Replies straight from your own mailbox (Microsoft 365, Gmail, IMAP): the email sits in your Sent folder, and the reply still lands with the contact.	–	–	✓	–	–	–	–	✓
Check the signature and conversation history before approving an email, then reply in the same thread or start a new message.	–	–	✓	–	–	–	–	✓

KMU | base

What’s included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
Sales | base · Data transfer and knowledge – Move safely from your current CRM – and capture what your sales team knows								
Import from your current CRM with a trial run.	–	–	✓	–	–	–	–	✓
Rollback of an import.	–	–	✓	–	–	–	–	✓
Matching against existing records.	–	–	✓	–	–	–	–	✓
Repeat import without duplicates.	–	–	✓	–	–	–	–	✓
In-house knowledge by rule, experience, customer and market – with source and validity.	–	–	✓	–	–	–	–	✓
Accept or reject suggestions for in-house knowledge.	–	–	✓	–	–	–	–	✓
Help texts for every page of Sales | base in four languages.	–	–	✓	–	–	–	–	✓
AI features run through the AI gateway in Switzerland.	–	–	✓	–	–	–	–	✓
Import directly in the list: for contacts, companies and opportunities with its own button next to creating, in empty lists on a par with “Add”.	–	–	✓	–	–	–	–	✓
Mapping assistant: recognises columns even with differing headers or by content, splits columns and shows reasoning and confidence for every suggestion; with AI switched on it helps without ever receiving cell values.	–	–	✓	–	–	–	–	✓
Recognise the same company or person: you link to the existing entry instead of creating a duplicate.	–	–	✓	–	–	–	–	✓
QMS | base · Document control – Every document checked, approved, distributed – and demonstrably read								
Review, approve and issue quality documents. Return drafts for changes and retire superseded versions.	–	–	–	✓	–	–	–	–
Version management with a change note for every new version.	–	–	–	✓	–	–	–	–

What's included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
QMS | base · Document control – Every document checked, approved, distributed – and demonstrably read								
Nine document types – manual, policy, process, procedure, work instruction, form, checklist, external document and record – each with its own number series.	–	–	–	✓	–	–	–	–
Four-eyes principle: whoever writes a document cannot approve it themselves; the rule can be switched off if needed.	–	–	–	✓	–	–	–	–
Effective date, including future dates, with notification on the effective date.	–	–	–	✓	–	–	–	–
Review interval per document, showing when the next review is due.	–	–	–	✓	–	–	–	–
Distribution to everyone, a company, a department, a job title or individuals – with a reading obligation.	–	–	–	✓	–	–	–	–
Read confirmation, read status per person and read rate per document.	–	–	–	✓	–	–	–	–
Reading reminder sent automatically after a set number of days, or manually.	–	–	–	✓	–	–	–	–
Control external documents such as laws or customer requirements with publisher and reference; the where-used list shows where they are used.	–	–	–	✓	–	–	–	–
QMS | base · Processes and responsibilities – Process map, workflows and RACI – so it is clear who is responsible for what								
Process map with management, core and support processes.	–	–	–	✓	–	–	–	–
Process profile with purpose, scope, owners, inputs and outputs, key figures and a note on risks.	–	–	–	✓	–	–	–	–
Workflow in swimlanes with start, activity, decision and end, entered in the form editor.	–	–	–	✓	–	–	–	–
Step list as a text version of the workflow.	–	–	–	✓	–	–	–	–
Workflow check that brings inconsistencies to light.	–	–	–	✓	–	–	–	–

What’s included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
QMS | base · Processes and responsibilities – Process map, workflows and RACI – so it is clear who is responsible for what								
RACI per activity with a check: exactly one A, at least one R.	–	–	–	✓	–	–	–	–
Interfaces to upstream and downstream processes.	–	–	–	✓	–	–	–	–
Links between processes, controlled documents, quality objectives and chapters of the standard.	–	–	–	✓	–	–	–	–
Roles with tasks, authorities and deputies, brought together in the responsibility matrix.	–	–	–	✓	–	–	–	–
Organisation chart from KMU | base, shared by all apps, without duplicate maintenance.	–	–	–	✓	–	–	–	–
Manage changes to processes, the organisation and IT from request through approval and implementation to review. Use templates for standard changes and approve urgent changes retrospectively.	–	–	–	✓	–	–	–	–
QMS | base · Audits – Audit programme, checklists and findings – from the plan to the approved report								
Internal audits, external audits and supplier audits with date, scope, objectives, criteria, processes and standard chapters.	–	–	–	✓	–	–	–	–
Reusable checklists with audit questions, also generated from selected standard chapters; the questions are frozen when the audit is prepared.	–	–	–	✓	–	–	–	–
Audit programme over up to three years, showing the audits per year and the active processes not yet covered by any audit in the period.	–	–	–	✓	–	–	–	–
Audit number per year, plus lead auditor and auditors per audit.	–	–	–	✓	–	–	–	–
Independence check: anyone responsible for a process within the audit scope is flagged as not independent.	–	–	–	✓	–	–	–	–
Overview of auditors with their qualification records and their validity from the competence records.	–	–	–	✓	–	–	–	–

What’s included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
QMS | base · Audits – Audit programme, checklists and findings – from the plan to the approved report								
Offline recording during the audit: data syncs on reconnection, and you decide conflicts with other people’s changes yourself.	–	–	–	✓	–	–	–	–
Findings as major or minor nonconformity, observation, opportunity for improvement or strength; nonconformities create an action with a deadline, major ones also a nonconformity report.	–	–	–	✓	–	–	–	–
Audit report with summary and conclusion as a PDF, filed in the archive after approval.	–	–	–	✓	–	–	–	–
External audits with certificate number and expiry date; a warning appears 90 days before expiry.	–	–	–	✓	–	–	–	–
Auditor access for external auditors: limited to 1–90 days, selected areas only, read-only, every access logged, revocable at any time.	–	–	–	✓	–	–	–	–
Audit package as a ZIP with manual, evidence report, management review, audit reports and actions.	–	–	–	✓	–	–	–	–
Attach photos to audit findings so the audit team can see the evidence alongside each finding.	–	–	–	✓	–	–	–	–
QMS | base · Reports and actions – Report, find the root cause, implement actions and check effectiveness – CAPA and 8D in one place								
Reports from all employees – nonconformity, improvement suggestion or near miss – with location, project, process, priority and photos, anonymously if they wish.	–	–	–	✓	–	–	–	–
Reporting channels with their own number prefix, report types, confidentiality, handlers and labels.	–	–	–	✓	–	–	–	–
Public reporting form via link or QR code without login, with a personal tracking link – including for anonymous reports.	–	–	–	✓	–	–	–	–

What's included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
QMS | base · Reports and actions – Report, find the root cause, implement actions and check effectiveness – CAPA and 8D in one place								
Confidentiality open, internal or confidential: confidential reports are visible only to the reporter, the channel's handlers and the person responsible.	–	–	–	✓	–	–	–	–
Internal notes for the team and external replies that reporters also see via the tracking link.	–	–	–	✓	–	–	–	–
Photos and PDFs attached to the report; HEIC photos are converted and every file is scanned for viruses.	–	–	–	✓	–	–	–	–
CAPA with immediate action, root cause analysis by 5×Why, Ishikawa or freely, root cause and costs in CHF.	–	–	–	✓	–	–	–	–
Effectiveness check with date and result before a report is closed, plus an 8D report with D1 to D8 as a PDF.	–	–	–	✓	–	–	–	–
Actions from all sources as a Kanban board with open, in progress and done, or as a list – all of them or only your own.	–	–	–	✓	–	–	–	–
Recurring actions from monthly to yearly and escalation of overdue items to the quality manager after the set number of days.	–	–	–	✓	–	–	–	–
Whistleblowing system: reporting channels with case managers, reports also anonymous via a link, acknowledgement and feedback on time; only case managers see the cases, and the content is encrypted.	–	–	–	✓	–	–	–	–
Requests and tickets to teams such as IT, HR, finance, QMS or facilities – across all apps, with queues, due dates and conversion into tasks.	–	–	–	✓	–	–	–	–
QMS | base · Risks, opportunities, ICS and occupational safety – Assess and treat risks and opportunities, and secure them with internal controls								
Separate registers for risks (R-) and opportunities (C-) with category, causes, consequences, process, context issue and owner.	–	–	–	✓	–	–	–	–

What's included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
QMS | base · Risks, opportunities, ICS and occupational safety – Assess and treat risks and opportunities, and secure them with internal controls								
Configurable risk matrix with levels per axis and thresholds for amber and red.	–	–	–	✓	–	–	–	–
Matrix view of all risks and opportunities.	–	–	–	✓	–	–	–	–
Strategy matching the type: avoid, reduce, transfer or accept for risks; exploit, enhance, share or forgo for opportunities.	–	–	–	✓	–	–	–	–
Target rating and history of every reassessment.	–	–	–	✓	–	–	–	–
Actions for the risk; the risk switches to "in treatment".	–	–	–	✓	–	–	–	–
Internal controls with objective, risk and process reference, owner and checkpoints.	–	–	–	✓	–	–	–	–
Frequency from daily to yearly with the next due date calculated automatically.	–	–	–	✓	–	–	–	–
Execution with an answer per checkpoint; a deficiency creates an action if you wish.	–	–	–	✓	–	–	–	–
Notification to the owner on the due date of a control.	–	–	–	✓	–	–	–	–
Occupational safety with a safety contact, safety and emergency organisation, a checklist for specialist involvement, hazardous substances, operating instructions and construction sites.	–	–	–	✓	–	–	–	–
QMS | base · Starter pack and mapping – Ready to go with the ISO 9001:2026 chapter structure and other standards – and always know where you stand								
Starter pack with a chapter structure based on ISO 9001:2026 in its own short titles, without the text of the standard.	–	–	–	✓	–	–	–	–
Several standards in one system: alongside ISO 9001 also ISO 14001, ISO 45001, ISO 27001, ISO 21001 and EFQM – individually or as an integrated management system, with standard mapping for each.	–	–	–	✓	–	–	–	–

What's included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
QMS | base · Starter pack and mapping – Ready to go with the ISO 9001:2026 chapter structure and other standards – and always know where you stand								
Your own standards such as HACCP with their own chapters, entered manually or by CSV import.	–	–	–	✓	–	–	–	–
Process map, draft documents, context, interested parties and roles as a starting point.	–	–	–	✓	–	–	–	–
Starter pack in English, German, French and Italian.	–	–	–	✓	–	–	–	–
Applicability per chapter with justification.	–	–	–	✓	–	–	–	–
Assessment per chapter – open, partial or fulfilled – with a coverage rate across all chapters.	–	–	–	✓	–	–	–	–
Assign processes and documents to chapters.	–	–	–	✓	–	–	–	–
Cockpit with open readings, control tasks, objective traffic lights and standard status.	–	–	–	✓	–	–	–	–
"To the certification audit in 90 days": nine phases up to the certification audit, with progress taken from your data, a plan with target date and owners, and a gap report per applicable chapter.	–	–	–	✓	–	–	–	–
Help texts for every page of QMS | base in four languages.	–	–	–	✓	–	–	–	–
QMS | base · Context and quality objectives – Context, quality policy and measurable objectives with traffic lights – at a glance in the cockpit								
Scope, services, locations and quality culture described in one place.	–	–	–	✓	–	–	–	–
Internal and external issues with category, impact and relevance.	–	–	–	✓	–	–	–	–
Interested parties with their expectations and how they are monitored.	–	–	–	✓	–	–	–	–
Quality policy as a controlled document with review, approval and read confirmation.	–	–	–	✓	–	–	–	–

KMU | base

What’s included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
QMS | base · Context and quality objectives – Context, quality policy and measurable objectives with traffic lights – at a glance in the cockpit								
Formally appoint the quality manager.	–	–	–	✓	–	–	–	–
Quality objectives with key figure, unit, direction, start and target value, tolerance and due date.	–	–	–	✓	–	–	–	–
Process link and responsible person for each objective.	–	–	–	✓	–	–	–	–
Actual values per reporting date with green, amber and red traffic lights and a progress indicator.	–	–	–	✓	–	–	–	–
Record and tick off actions for each objective.	–	–	–	✓	–	–	–	–
Traffic-light overview of all objectives in the QMS | base cockpit.	–	–	–	✓	–	–	–	–
Build your dashboard with metrics, open actions, required reading, training and objectives.	–	–	–	✓	–	–	–	–
QMS | base · Complaints – Record, assess and answer customer complaints – then ask about satisfaction								
Customer complaints with customer, company, email and reference in their own filterable list.	–	–	–	✓	–	–	–	–
Assessment as justified, partly justified or unjustified.	–	–	–	✓	–	–	–	–
Record the reply to the customer and the credit amount in CHF.	–	–	–	✓	–	–	–	–
Immediate action, root cause analysis with 5×Why or Ishikawa and costs in CHF, as for any nonconformity.	–	–	–	✓	–	–	–	–
Actions for the complaint with responsibility and deadline, plus an effectiveness check before closing.	–	–	–	✓	–	–	–	–
Internal notes and external replies kept separate.	–	–	–	✓	–	–	–	–
Photos and PDFs attached to the complaint, every file scanned for viruses.	–	–	–	✓	–	–	–	–

What’s included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
QMS | base · Complaints – Record, assess and answer customer complaints – then ask about satisfaction								
Feedback link by email after closing, valid for 60 days, for satisfaction from 1 to 5 and a comment – without login.	–	–	–	✓	–	–	–	–
Customer satisfaction from this feedback automatically feeds into the management review.	–	–	–	✓	–	–	–	–
QMS | base · Training and competence – Who needs to know what, who knows what – and the right training with proof								
Requirements per job title as mandatory or recommended.	–	–	–	✓	–	–	–	–
Qualification matrix with required, actual, expiry warning and degree of fulfilment, filterable by job title.	–	–	–	✓	–	–	–	–
Training catalogue for classroom, online and e-learning training with sessions, location, online link, seats and trainer.	–	–	–	✓	–	–	–	–
Self-registration with waiting list and automatic move-up; training that requires approval goes through a request.	–	–	–	✓	–	–	–	–
E-learning with lessons and progress display; registered participants are reminded of their session the day before.	–	–	–	✓	–	–	–	–
Quiz with a pass mark in percent, for training and for documents.	–	–	–	✓	–	–	–	–
Completion with certificate number, PDF certificate and entry in the competence records with validity.	–	–	–	✓	–	–	–	–
Feedback from participants and assessment of effectiveness by administrators.	–	–	–	✓	–	–	–	–
Everyone sees their own participations and open mandatory training; the training plan shows who has not yet completed which mandatory training.	–	–	–	✓	–	–	–	–

What's included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
QMS | base · Training and competence – Who needs to know what, who knows what – and the right training with proof								
Training before entry into force: when a document is approved, its distribution list is registered for the linked training, and read confirmation is only possible after completing the training.	–	–	–	✓	–	–	–	–
QMS | base · Suppliers – Approve and evaluate suppliers – and raise complaints when something goes wrong								
Supplier list with category, service, contact person and email, with search and status filter.	–	–	–	✓	–	–	–	–
Status new, approved, conditional or blocked.	–	–	–	✓	–	–	–	–
Evaluation with 1 to 5 points by weighted criteria – quality, delivery, price, communication and complaints – or by your own criteria.	–	–	–	✓	–	–	–	–
Status suggestion from the evaluation result.	–	–	–	✓	–	–	–	–
The criteria of the last evaluation serve as the template for the next one.	–	–	–	✓	–	–	–	–
Evaluation history per supplier with date and evaluator.	–	–	–	✓	–	–	–	–
Date of the next evaluation with a reminder to the quality manager as soon as it is due.	–	–	–	✓	–	–	–	–
Complaint to the supplier as a nonconformity linked to the supplier, recorded directly with the supplier; the list shows the number of complaints.	–	–	–	✓	–	–	–	–
Supplier audits with checklist, findings and report.	–	–	–	✓	–	–	–	–
Batches with supplier and receipt date for traceability.	–	–	–	✓	–	–	–	–
QMS | base · Operational records and batches – Checklists for requirements, development and release – and batches you can trace								
Six record types: customer requirements, development, release of products and services, traceability, external property and post-delivery activities.	–	–	–	✓	–	–	–	–

What's included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
QMS | base · Operational records and batches – Checklists for requirements, development and release – and batches you can trace								
Checklist per record from the template, freely extendable.	–	–	–	✓	–	–	–	–
Submit, approve or reject by an authorised person; with the four-eyes principle, the responsible person does not approve their own record.	–	–	–	✓	–	–	–	–
Record list with search and filter by type and status.	–	–	–	✓	–	–	–	–
Batches with item, supplier, receipt date and quantity.	–	–	–	✓	–	–	–	–
Usage in follow-on batches and dispatch to recipients with reference and quantity.	–	–	–	✓	–	–	–	–
Forward and backward traceability: every batch shows its origin and its usage.	–	–	–	✓	–	–	–	–
Batch block, optionally including all follow-on batches, to prepare a recall.	–	–	–	✓	–	–	–	–
QMS | base · Management review, meetings and reports – Management review, quality meetings and analyses – with decisions that are followed up								
Management review populated automatically with objectives, audits, reports, complaints including customer satisfaction, actions, risks, controls, documents, standard coverage, context and earlier decisions – as a snapshot.	–	–	–	✓	–	–	–	–
Assessment per section by management.	–	–	–	✓	–	–	–	–
Decisions are followed up as actions with owner and due date.	–	–	–	✓	–	–	–	–
Minutes as a PDF after approval, filed in the archive.	–	–	–	✓	–	–	–	–
Quality meetings with location, online link, participants and agenda items; participants are notified.	–	–	–	✓	–	–	–	–
Keep the meeting minutes directly in QMS | base.	–	–	–	✓	–	–	–	–

What’s included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
QMS | base · Management review, meetings and reports – Management review, quality meetings and analyses – with decisions that are followed up								
Decision tracking: all open decisions from meetings and reviews with owner and due date.	–	–	–	✓	–	–	–	–
Analyses with charts from twelve building blocks, such as reports, actions, objective trends, read rate, forms and usage, over selectable months.	–	–	–	✓	–	–	–	–
Save report templates and export reports as Excel or CSV.	–	–	–	✓	–	–	–	–
Certification readiness with 14 checkpoints from context to standard coverage and the next steps.	–	–	–	✓	–	–	–	–
QMS | base · Customer surveys – Ask about customer satisfaction via link or QR code – and track it as a KPI in your quality objective								
Customer surveys with scale questions from 1 to 5, NPS questions from 0 to 10 and text questions.	–	–	–	✓	–	–	–	–
Suggested questions as a starting point, introduction text and mandatory questions.	–	–	–	✓	–	–	–	–
Activate and close the survey, with an optional end date.	–	–	–	✓	–	–	–	–
Public link with QR code: customers answer without logging in, optionally stating their company.	–	–	–	✓	–	–	–	–
Spam protection and a limit on responses per IP address.	–	–	–	✓	–	–	–	–
After the first response the questions are fixed, so the analysis stays comparable.	–	–	–	✓	–	–	–	–
Analysis per question with average, distribution, NPS and all text answers.	–	–	–	✓	–	–	–	–
Number of responses and responding companies at a glance.	–	–	–	✓	–	–	–	–
Transfer the result as an actual value to a quality objective – the NPS or satisfaction in percent.	–	–	–	✓	–	–	–	–

KMU | base

What’s included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
QMS | base · Knowledge and communication – Wiki, glossary, news and team spaces – so knowledge stays in the company and everyone is informed								
Wiki with categories, search and approval workflow: draft, review, approved, archived.	–	–	–	✓	–	–	–	–
All employees propose pages; administrators approve them.	–	–	–	✓	–	–	–	–
Versions: every change to an approved page becomes a new version, earlier versions remain viewable.	–	–	–	✓	–	–	–	–
Knowledge article from a resolved report with problem, cause and solution, as a draft in one click.	–	–	–	✓	–	–	–	–
Glossary with definition and synonyms per term.	–	–	–	✓	–	–	–	–
Automatic explanation of glossary terms in the wiki, processes and documents.	–	–	–	✓	–	–	–	–
Glossary import and export as CSV.	–	–	–	✓	–	–	–	–
News and events with date and location; everyone or the space members are notified.	–	–	–	✓	–	–	–	–
Comments and reactions – thumbs up, heart, idea or question – on news and wiki pages.	–	–	–	✓	–	–	–	–
Protected team spaces with their own news and wiki pages, visible only to members.	–	–	–	✓	–	–	–	–
QMS | base · Occupational safety – Assess hazards, report incidents and document inspections								
Risk assessments by work area and activity, including protective measures and residual risk.	–	–	–	✓	–	–	–	–
Record occupational safety incidents and other events with internal reporting deadlines.	–	–	–	✓	–	–	–	–

What's included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
QMS | base · Occupational safety – Assess hazards, report incidents and document inspections								
Document site inspections with findings and safety measures.	–	–	–	✓	–	–	–	–
Manage emergency arrangements, first aiders and hazardous substances with safety data sheets.	–	–	–	✓	–	–	–	–
Docu | base · Audit-proof archive – Immutable archiving with SHA-256, hash chain and timestamps – built to the requirements of the GeBüV								
Immutable archiving; corrections only as a new version with a reference.	–	–	–	–	✓	–	–	–
SHA-256 checksum for every file.	–	–	–	–	✓	–	–	–
Hash chain per customer across archive entries and log.	–	–	–	–	✓	–	–	–
An external timestamping service provides daily evidence of the state of the archive.	–	–	–	–	✓	–	–	–
Monthly integrity check of hashes, chains, timestamps and readability.	–	–	–	–	✓	–	–	–
Original and derived version (PDF/A, OCR text) linked – the original is always kept.	–	–	–	–	✓	–	–	–
Inventory by company and financial year.	–	–	–	–	✓	–	–	–
Automatic archiving of Finance receipts, payroll records and HR documents.	–	–	–	–	✓	–	–	–
Template for the procedural documentation under GeBüV Art. 4.	–	–	–	–	✓	–	–	–
Email archive if you wish: archive emails in an audit-proof way, import .eml and .mbox files, connect further mailboxes read-only via IMAP with nightly sync.	–	–	–	–	✓	–	–	–

What’s included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
Docu | base · Document types and files – Folders with permissions, private area, document types with mandatory fields, versions, workflows, document control and signatures								
Real folders with permissions for people, roles and departments – read, edit, manage – passed down to subfolders.	–	–	–	–	✓	–	–	–
Versions with old/new field history; an older version can be restored as a new version.	–	–	–	–	✓	–	–	–
Set up document workflows for invoices and contracts from templates. Choose who approves, which steps run in parallel and when a further check is needed.	–	–	–	–	✓	–	–	–
Document types with fields for text, number, amount, date, validated IBAN and selection lists.	–	–	–	–	✓	–	–	–
Mandatory fields and filing rule for each type.	–	–	–	–	✓	–	–	–
Eight templates – supplier invoice, receipt, contract, correspondence, quotation, annual report, manual, general – adaptable for your company.	–	–	–	–	✓	–	–	–
Private area for each person, in the browser and on the network drive.	–	–	–	–	✓	–	–	–
Files as a folder tree by company, year and type.	–	–	–	–	✓	–	–	–
Two states, “in progress” and “archived”, plus types set to “archive immediately”.	–	–	–	–	✓	–	–	–
Check-out and check-in to prevent simultaneous editing.	–	–	–	–	✓	–	–	–
Links between documents, and comments.	–	–	–	–	✓	–	–	–
Duplicate detection via SHA-256 checksum.	–	–	–	–	✓	–	–	–
In-browser preview for PDFs, images, text and emails; Office files as a text extract.	–	–	–	–	✓	–	–	–

What’s included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
Docu | base · Document types and files – Folders with permissions, private area, document types with mandatory fields, versions, workflows, document control and signatures								
Separate reviewers and approvers for controlled documents, with deputies, effective dates and read acknowledgements.	–	–	–	–	✓	–	–	–
Contract register with end date, notice period, next termination date and a reminder 60 days before.	–	–	–	–	✓	–	–	–
Simple electronic signatures are included, internally and for external signers via a link and code. Advanced and qualified signatures are available with a configured signature service, subject to its terms and fees. Choose the level required by your document’s form requirements.	–	–	–	–	✓	–	–	–
Requests and tickets to teams such as IT, HR, finance, QMS or facilities – across all apps, with queues, due dates and conversion into tasks.	–	–	–	–	✓	–	–	–
Send documents by post: PDFs and Office files as a letter, with an address-window preview, confirmed price and cover letter.	–	–	–	–	✓	–	–	–
Automatically create folders for customers, suppliers, projects, staff and properties using your own filing plans or built-in templates.	–	–	–	–	✓	–	–	–
Rotate, reorder, split or merge PDF pages, or create a redacted copy.	–	–	–	–	✓	–	–	–
Docu | base · Full-text search – Full-text search across content and metadata, with OCR in four languages – always filtered by rights								
Full-text search across content and metadata.	–	–	–	–	✓	–	–	–
Rights filter before any hit is shown.	–	–	–	–	✓	–	–	–
Hits from HR | base, Finance | base and QMS | base according to their rights.	–	–	–	–	✓	–	–	–
Filters by document type, company and state.	–	–	–	–	✓	–	–	–

What’s included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
Docu | base · Full-text search – Full-text search across content and metadata, with OCR in four languages – always filtered by rights								
Text recognition (OCR) for printed text in German, French, Italian and English.	–	–	–	–	✓	–	–	–
OCR runs locally on our servers – no data leaves.	–	–	–	–	✓	–	–	–
Classification by rules first: keywords, date, amount, IBAN, number.	–	–	–	–	✓	–	–	–
AI only when uncertain – and only ever as a proposal.	–	–	–	–	✓	–	–	–
Find and open documents from quick search or view the full list of matches.	–	–	–	–	✓	–	–	–
Docu | base · Document intake – Capture documents via browser, email, scanner, drive or app – checked before they are filed								
Intake with a check before filing: confirm type and fields.	–	–	–	–	✓	–	–	–
Duplicate warning and virus scan.	–	–	–	–	✓	–	–	–
Drag and drop files or entire folders while keeping the folder structure intact.	–	–	–	–	✓	–	–	–
Your own email addresses such as scan.muster@docubase.ch and muster@docubase.ch – for scan-to-email from the multifunction printer.	–	–	–	–	✓	–	–	–
Scan-to-folder via the “Inbox” folder on the network drive.	–	–	–	–	✓	–	–	–
Bulk import from ZIP file or folder, fields taken from the file path, with a dry run.	–	–	–	–	✓	–	–	–
Multi-page scan with the camera in the KMU | base app, saved as a single PDF.	–	–	–	–	✓	–	–	–
Forms: internal with sign-in or as a public web form without sign-in; each submission becomes a PDF document and can start a workflow.	–	–	–	–	✓	–	–	–
Split batches of scans using QR separator sheets or blank pages, and straighten skewed pages.	–	–	–	–	✓	–	–	–

What's included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
Docu | base · Share links – Share documents securely: with expiry date, optional password, limited downloads and a full log								
Expiry date required for every link.	–	–	–	–	✓	–	–	–
Optional password.	–	–	–	–	✓	–	–	–
Maximum number of downloads.	–	–	–	–	✓	–	–	–
Revocation at any time.	–	–	–	–	✓	–	–	–
Every access recorded in the log.	–	–	–	–	✓	–	–	–
Lockout after 5 failed attempts.	–	–	–	–	✓	–	–	–
Bundle several documents into a collection and share a snapshot as a ZIP file via a link.	–	–	–	–	✓	–	–	–
Docu | base · Office in the browser – Edit Word, Excel and PowerPoint files directly in the browser – together, too, on our Swiss server								
Edit Office documents in the browser: texts (Word), spreadsheets (Excel) and presentations (PowerPoint).	–	–	–	–	✓	–	–	–
Co-editing: several people in the same document at the same time.	–	–	–	–	✓	–	–	–
Every save creates a new version with history.	–	–	–	–	✓	–	–	–
The folder and document permissions of Docu | base apply.	–	–	–	–	✓	–	–	–
Runs on the Swiss server of KMU | base – no document leaves Switzerland.	–	–	–	–	✓	–	–	–
No installation and no additional licence needed.	–	–	–	–	✓	–	–	–
Included in Docu | base.	–	–	–	–	✓	–	–	–
Generated documents such as a contract, reference letter or cover letter are edited directly in Office; the edited version is used for the PDF and signature.	–	–	–	–	✓	–	–	–

What's included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
Docu | base · Retention and deletion – Retention periods by class, legal hold, and deletion only with four-eyes approval								
Retention classes, for example 10 years from the end of the financial year or 20 years for VAT-relevant records on real estate.	–	–	–	–	✓	–	–	–
Period starts at the end of the financial year or from an event.	–	–	–	–	✓	–	–	–
Statutory periods can never be shortened; extension for your company is possible.	–	–	–	–	✓	–	–	–
Legal hold for legal matters.	–	–	–	–	✓	–	–	–
Deletion only after expiry, with four-eyes approval and a deletion record in the inventory.	–	–	–	–	✓	–	–	–
Early deletion on legal grounds, such as an erasure request under the FADP – never for classes with a statutory period.	–	–	–	–	✓	–	–	–
Deletion request directly in the document.	–	–	–	–	✓	–	–	–
Storage usage against your quota, with warning levels.	–	–	–	–	✓	–	–	–
Set up your home page with the inbox, approvals and archive deadlines that matter to your work.	–	–	–	–	✓	–	–	–
Docu | base · Network drive – Docu | base in Finder and File Explorer with your existing folder permissions								
Network drive (WebDAV) in Finder on macOS and File Explorer on Windows.	–	–	–	–	✓	–	–	–
Real folders with their permissions, plus your private area on the drive.	–	–	–	–	✓	–	–	–
Every save creates a new version.	–	–	–	–	✓	–	–	–
Create folders, rename and move files and folders, and copy documents. Files you have permission to delete move to the recycle bin.	–	–	–	–	✓	–	–	–

What's included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
Docu | base · Network drive – Docu | base in Finder and File Explorer with your existing folder permissions								
File locks for Office programs against simultaneous editing.	–	–	–	–	✓	–	–	–
System files from macOS and Windows are discarded.	–	–	–	–	✓	–	–	–
Personal drive access with a password shown once and revocable.	–	–	–	–	✓	–	–	–
Lockout after failed sign-in attempts.	–	–	–	–	✓	–	–	–
Guide for macOS and Windows.	–	–	–	–	✓	–	–	–
Rights reloaded at every sign-in.	–	–	–	–	✓	–	–	–
Docu | base · Security and storage – AES-256-GCM per file with its own key, storage in Switzerland, daily backup to a second location								
Encryption of every file with AES-256-GCM.	–	–	–	–	✓	–	–	–
Separate key per customer, with key versions and rotation.	–	–	–	–	✓	–	–	–
Storage in Swiss object storage, encrypted before transfer.	–	–	–	–	✓	–	–	–
Daily backup to a second location with spot checks.	–	–	–	–	✓	–	–	–
Annual restore test against an isolated copy.	–	–	–	–	✓	–	–	–
File type check from content and virus scan.	–	–	–	–	✓	–	–	–
Separation by customer, company and document class on every read.	–	–	–	–	✓	–	–	–
Sensitive document classes only for authorised people.	–	–	–	–	✓	–	–	–
Two-factor authentication.	–	–	–	–	✓	–	–	–
Docu | base · Export for auditors – Verifiable export with hash list, metadata, complete logs and a verification tool – checkable without our software								
ZIP export with folder structure.	–	–	–	–	✓	–	–	–

What’s included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
Docu | base · Export for auditors – Verifiable export with hash list, metadata, complete logs and a verification tool – checkable without our software								
Metadata as JSON, CSV and XML.	–	–	–	–	✓	–	–	–
Hash list of all files.	–	–	–	–	✓	–	–	–
Complete logs with their hash chains included in the export.	–	–	–	–	✓	–	–	–
The included tool checks files, package sequence, logs and timestamps on your own computer.	–	–	–	–	✓	–	–	–
Time proofs from an external timestamping authority over the archive state and every package.	–	–	–	–	✓	–	–	–
Your storage retrieves a full package first and then collects incremental packages. Set the schedule and retention period, and use a revocable read-only key.	–	–	–	–	✓	–	–	–
Complete access log, including viewing, downloading and denied access.	–	–	–	–	✓	–	–	–
Dedicated hash chain for the access log.	–	–	–	–	✓	–	–	–
Online | base · Website – manage your content								
Change texts	–	–	–	–	–	✓	–	–
Create pages	–	–	–	–	–	✓	–	–
Book appointments on the website. Check staff, room and equipment availability and send optional reminders.	–	–	–	–	–	✓	–	–
Swap images	–	–	–	–	–	✓	–	–
Update opening hours	–	–	–	–	–	✓	–	–
Search engine details	–	–	–	–	–	✓	–	–

What's included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
Online | base · Website – manage your content								
Translate texts	–	–	–	–	–	✓	–	–
Make the same changes in the editor if you prefer.	–	–	–	–	–	✓	–	–
Online | base · Online shop – from products to delivery								
Items, variants and photos from Finance | base, texts in four languages. Import your current range from a spreadsheet.	–	–	–	–	–	With Finance | base	–	–
Buy as a guest or with a customer account, customer discounts, shipping with a free threshold. Prices and VAT are calculated on the server.	–	–	–	–	–	With Finance | base	–	–
Earn and redeem loyalty points in store and online for discounts, free items or gift vouchers.	–	–	–	–	–	With Finance | base	–	–
Every order with status, shipping and returns. The confirmation goes out by email with the QR-bill. Accept returns for a whole online order or individual items. Finance issues the credit note and returns the goods to stock. Arrange cards for open orders and shop metrics on your home page.	–	–	–	–	–	With Finance | base	–	–
Every order books the stock movement at once. With POS | base, shop and store sell from the same stock.	–	–	–	–	–	With Finance | base	–	–
Online | base · Publishing – stay in control of changes								
Preview changes and choose when to publish them.	–	–	–	–	–	✓	–	–
Run your website in German, French, Italian and English.	–	–	–	–	–	✓	–	–
Provide a sitemap and redirect old page addresses.	–	–	–	–	–	✓	–	–
Display pages in a mobile-friendly layout.	–	–	–	–	–	✓	–	–
Edit each page's SEO title, description and preview image for search results and shared links.	–	–	–	–	–	✓	–	–

What’s included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
Online | base · Publishing – stay in control of changes								
Restore previously published versions	–	–	–	–	–	✓	–	–
Online | base · Online shop – payments and vouchers								
On invoice with QR-bill, by prepayment or with PayPal via your own account. Finance | base matches incoming payments.	–	–	–	–	–	With Finance | base	–	–
Pay an appointment deposit in the shop by card or TWINT during the payments pilot.	–	–	–	–	–	With Finance | base	–	–
Value vouchers and discount codes for promotions – online and at the till alike.	–	–	–	–	–	With Finance | base	–	–
Reconcile shop payments and orders in Finance | base	–	–	–	–	–	With Finance | base	–	–
Online | base · Hosting – secure in Switzerland								
Connect a domain	–	–	–	–	–	✓	–	–
Encrypted connection for every domain, renewed automatically.	–	–	–	–	–	✓	–	–
We keep the technology up to date. No plugins that go stale.	–	–	–	–	–	✓	–	–
Manage your own domain and keep it if you switch providers	–	–	–	–	–	✓	–	–
Online | base · Email – use your own address								
You read and answer your mail in the mail centre on the home page and in the records, with AI reply suggestions. No separate webmail.	–	–	–	–	–	Optional	–	–
You create mailboxes in Online | base. No separate account with the hosting provider, no second login.	–	–	–	–	–	Optional	–	–

KMU | base

What’s included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
Online | base · Email – use your own address								
Plenty of space for every mailbox. Extra addresses such as info@ or quotes@ as aliases cost nothing.	–	–	–	–	–	Optional	–	–
If you like, you connect personal mailboxes to your phone or Outlook with a separate device access.	–	–	–	–	–	Optional	–	–
Bring existing email with you when switching	–	–	–	–	–	Optional	–	–
Online | base · Website and business – shared records								
Follow up website enquiries in your sales team with Sales | base enabled	–	–	–	–	–	✓	–	–
Website, enquiries and email on the same platform as your other apps.	–	–	–	–	–	✓	–	–
POS | base · Payments – offer the right option								
Accept TWINT by QR code using your own merchant account during the payments pilot.	–	–	–	–	–	–	✓	–
Post confirmed card and TWINT transaction fees from provider statements to Finance | base.	–	–	–	–	–	–	✓	–
Card and TWINT via the connected card terminal or with Tap to Pay right on iPhone or Android. Your existing terminal keeps working.	–	–	–	–	–	–	✓	–
Card and TWINT via the card terminal; the receipt closes only after confirmation. At the self-checkout, customers scan themselves.	–	–	–	–	–	–	✓	–
POS | base · Sales – from scan to receipt								
Tap, search or scan an item, assign a customer, give a discount, park a sale. For cash, the till rounds to 5 centimes and works out the change.	–	–	–	–	–	–	✓	–
Earn points at the till, scan the loyalty card QR code and redeem points for discounts, free items or vouchers. Returns update the points balance.	–	–	–	–	–	–	✓	–

What’s included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
POS | base · Sales – from scan to receipt								
Returns with a receipt in cash or as a voucher, without one only with the manager’s approval. Sell and redeem vouchers right at the till. Exchange a size or colour using the original receipt. The till shows the cash difference and updates stock.	–	–	–	–	–	–	✓	–
Exchange items at the till and collect or refund the difference.	–	–	–	–	–	–	✓	–
If the internet goes down, the till keeps selling. Every receipt is sent exactly once as soon as the connection is back.	–	–	–	–	–	–	✓	–
In the browser, on the iPad and in the app for iPhone and Android	–	–	–	–	–	–	✓	–
POS | base · Daily close – reconcile till and accounts								
X report as an interim status, Z closing with a count per note and coin. The difference is booked, the Z report is ready as a PDF.	–	–	–	–	–	–	✓	–
Every receipt instantly in Finance | base – with VAT, stock and cash book	–	–	–	–	–	–	✓	–
Sign in with the till PIN, open the shift with the float. New staff practise in training mode first.	–	–	–	–	–	–	✓	–
Cashiers need no accounting rights, larger discounts are approved by the manager. In training mode, new staff practise without real money.	–	–	–	–	–	–	✓	–
POS | base · Hospitality – from the table to the kitchen								
The table plan shows free tables. Any phone becomes an ordering device, the kitchen display runs on its own screen.	–	–	–	–	–	–	✓	–
Order per table with courses and a note to the kitchen such as “no onions” – usable with one hand.	–	–	–	–	–	–	✓	–

KMU | base

What’s included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
POS | base · Hospitality – from the table to the kitchen								
One tap on “Send” sends everything to the kitchen or bar. Later courses wait until service calls them.	–	–	–	–	–	–	✓	–
“Done” in the kitchen tells service “Table 4 ready for pickup”. If a display fails, the till prints the kitchen ticket.	–	–	–	–	–	–	✓	–
As a whole, by item or in equal shares – to the centime, with tip and booked at once.	–	–	–	–	–	–	✓	–
Job | base · Candidate pool – manage consent								
Two-way AI matching suggests candidates for a mandate and open mandates for a candidate, with reasons drawn from their documents.	–	–	–	–	–	–	–	✓
Candidates approve sharing with a client using a link. Consent for the candidate pool is managed separately with an expiry date.	–	–	–	–	–	–	–	✓
Publish roles on your careers site and job boards. Each application retains its source.	–	–	–	–	–	–	–	✓
Filter candidates by Swiss postcode and distance.	–	–	–	–	–	–	–	✓
Merge duplicate candidate records into a single profile in the talent pool.	–	–	–	–	–	–	–	✓
Job | base · Submissions – make decisions with the client								
Build a shortlist, refine the search criteria and submit the selected profiles for review.	–	–	–	–	–	–	–	✓
Choose the fields for client dossiers and the match list. With consent, share them as PDFs or in the client portal, with anonymisation if needed.	–	–	–	–	–	–	–	✓
In the client portal, your client invites candidates, declines or asks questions. The link opens without an account.	–	–	–	–	–	–	–	✓

KMU | base

What’s included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
Job | base · Submissions – make decisions with the client								
Password-protect or revoke the client portal link as needed.	–	–	–	–	–	–	–	✓
Job | base · Temporary placements – connect time and payroll								
Job | base suggests temporary staff for multiple open shifts and flags conflicts. Staff respond in the app and the staffing office confirms their assignments.	–	–	–	–	–	–	–	✓
Mobile app for temporary workers – view assignments, clock in with location and log timesheets.	–	–	–	–	–	–	–	✓
Clients sign in with two-factor authentication to approve hours or return them for correction in the client portal.	–	–	–	–	–	–	–	✓
Import client timesheets from Excel, CSV, PDFs or photos and check how entries are matched before accepting them.	–	–	–	–	–	–	–	✓
Release approved hours for each pay period and run payroll in HR | base.	–	–	–	–	–	–	–	✓
Create draft invoices from approved hours, include the timesheets and see the margin per assignment.	–	–	–	–	–	–	–	✓
Plan temporary assignments on the weekly schedule.	–	–	–	–	–	–	–	✓
Record safety instructions and collective agreement classifications.	–	–	–	–	–	–	–	✓
Prepare draft contracts for assignments.	–	–	–	–	–	–	–	✓
Job | base · Recruitment – manage assignments and clients								
Agree on a fee as a percentage of gross annual salary or a fixed amount. Record the guarantee period and exclusivity directly on the assignment.	–	–	–	–	–	–	–	✓
Finance | base receives a draft placement fee invoice. You get a reminder for the guarantee period and see commission for each recruiter.	–	–	–	–	–	–	–	✓

KMU | base

What’s included?

Feature	HR | base	Finance | base	Sales | base	QMS | base	Docu | base	Online | base	POS | base	Job | base
Job | base · Recruitment – manage assignments and clients								
Prepare conversation records with Swiss AI on placement assignments and confirm them with tasks and a follow-up draft.	–	–	–	–	–	–	–	✓
Sales | base brings together companies, contacts and meeting notes. Select the customer for a mandate from this shared directory.	–	–	–	–	–	–	–	✓
See expected fees, applicants at each stage and time to placement on the assignment board.	–	–	–	–	–	–	–	✓
Carry job advertising costs into a draft invoice.	–	–	–	–	–	–	–	✓
Recruitment agency demo with sample CVs and open mandates.	–	–	–	–	–	–	–	✓