



INSPECTRA

User guide

From your first client to a completed project

A practical guide to getting started with Inspectra, finding each feature and working step by step. Read it in order when you start, or use the contents to go directly to the task you need.

English · PDF

46 practical chapters · Getting started · New features

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Available screens depend on your role. These procedures describe the application at the date of this edition; the interface may change. Sample names, amounts and measurements are fictional and are not instructions for electrical inspection.

Application screenshots use fictional data. Some document labels may remain bilingual or in French.

Sign in and install Inspectra

Access path · click in this order

Sign-in screen → Your account

Open Inspectra in Chrome, Edge or Safari. The application blocks Firefox. You need a connection to sign in for the first time and prepare projects on this device.

- 1 On the sign-in page, choose FR, DE, IT or EN before signing in. This sets the interface language; the guide menu always offers all four PDFs.
- 2 If your company has given you an account, use those credentials. Otherwise, choose Create account and enter your e-mail and password, or use the Google sign-in option.
- 3 After registering by e-mail, open the verification message and follow its link. Check your spam folder; use the resend button if you need another message.
- 4 Sign in. If a subscription screen appears, the owner can start the trial or manage the subscription. A team member whose access is suspended should contact the owner.
- 5 If you have forgotten your password, use Forgot password on the sign-in screen and follow the e-mail instructions.
- 6 To install the app, use Install application in Settings when the button is available. On iPhone/iPad, open Inspectra in Safari, then Share → Add to Home Screen.

Practical tip

Let an ongoing reconnection finish before entering your credentials again. Signing in on another device may end the other session.

Check the result

Your account and the home screen are visible. Installation adds a shortcut; also prepare your projects before working without a connection.

Getting started: configure before you work

Access path · click in this order

Profile → Company → Clients → Team → First project

Complete this preparation in order, using the owner account for company settings. Team members then complete their own profiles. Skip importing and team setup if you work alone without an existing client list.

- 1 Identity and documents: profile picture at the top right → Settings → Controller Profile. Enter first and last name, company, address, telephone, K number and measuring instrument. Add your signature under Signature and your logo under Logo / Branding. Wait for confirmation that the changes are saved.
- 2 Reference working hours: main navigation → Company → Hours. Set working days, start and end times and breaks. Expand individual days where needed, then save.
- 3 Billing: Company → Billing. For standard Inspectra billing, complete company details, IBAN and the available settings. For bexio, click «**Connecter mon compte bexio**», authorise the connection and confirm the correct company. bexio accounting settings remain in bexio.
- 4 Existing clients: Clients → Import clients. Select XLSX, XLS, CSV or TSV, check column mapping and review the records. Check owners, associations, contact details, EGIDs and similar records. Confirm your review, then create the selected records. Without a list, create a new client.

Getting started: configure before you work

Access path · click in this order

Profile → Company → Clients → Team → First project

- 5 Staff accounts if needed: Company → Accounts & plan → Create account. Enter name, e-mail and initial password, then create the account. Share credentials securely. Each person must verify their address through the e-mail link before signing in.
- 6 Each person's contract and permissions: Company → Team → member row → Hours for their actual days and hours, then Leave for their start date, holiday weeks and any carry-over. Save. Under Team, set their role and access rights; each inspector also completes their profile.
- 7 Only then start working: check a calendar week and balances, then complete a practice workflow with a fictional client. Check documents, PDFs, synchronisation and the chosen billing route. Prepare projects on your phone before going on site.

Practical tip

Keep an original copy of your client list and archives. Importing clients does not transfer old reports or accounting entries. Do not recreate old invoices as new revenue.

Check the result

Identity, signature, working hours, billing software, clients and team are ready. Everyone knows their access rights before the first real project.

Find your way around the application

Access path · click in this order

Home · Navigation bar · Profile picture

Home brings together information about your work. Dedicated screens let you create, review or complete the corresponding items.

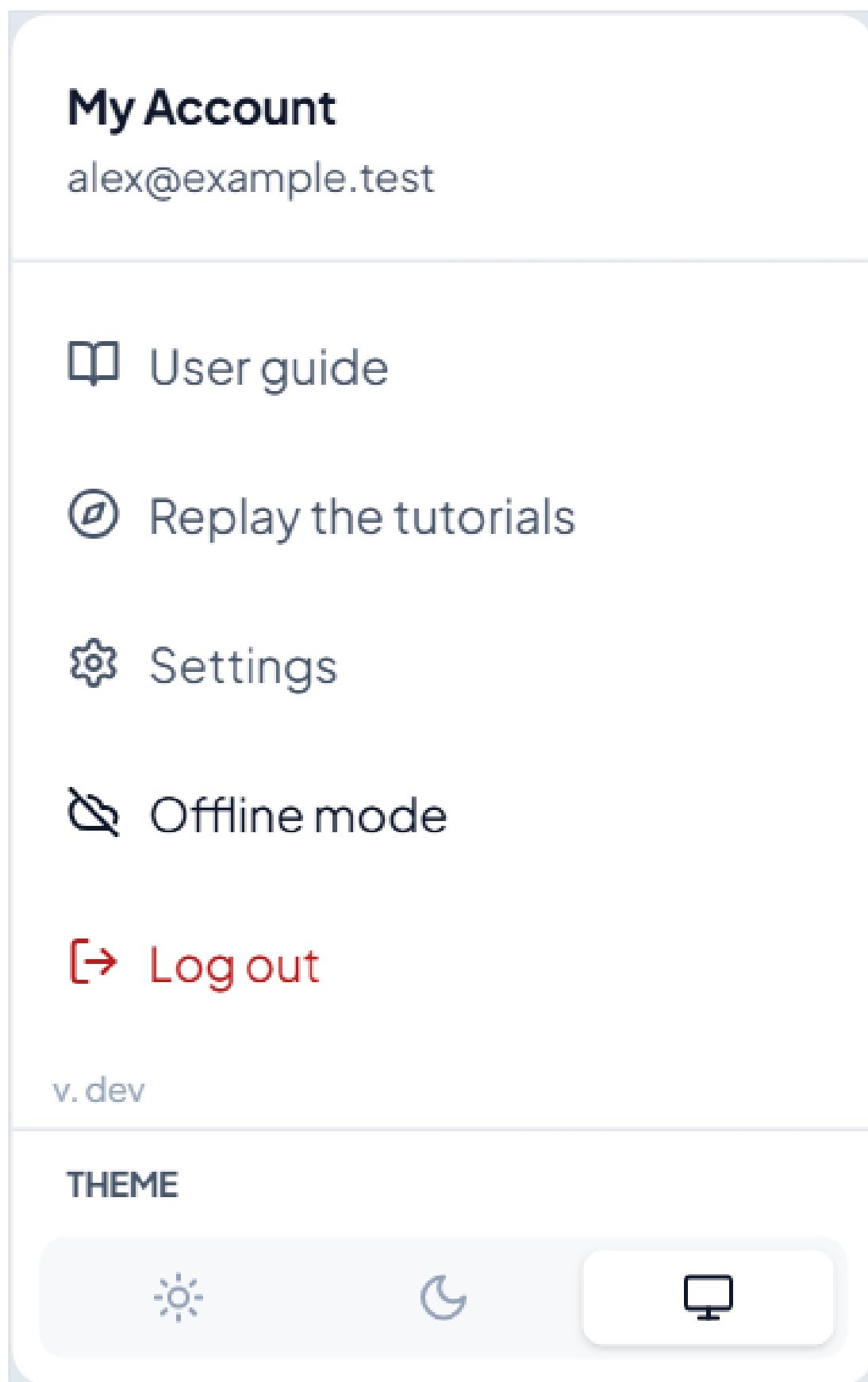
- 1 Use Home to find today's appointments, recent reports and follow-up items available to your role. Select an item to resume that work.
- 2 Open Clients for contact records and projects, Library for observations, and Agenda for appointments.
- 3 Company opens settings and team management. Billing opens the Inspectra financial centre or bexio tracking according to the selected software and your permissions.
- 4 On a phone, use the bottom navigation. Additional actions may be in the More menu; scroll inside longer windows.
- 5 Select your profile picture for Settings, light/dark/system appearance, Offline, this guide and the option to replay tutorials. The menu also shows the running version.
- 6 Paths list the buttons to open in order. On phones, main navigation is at the bottom; window tabs may scroll horizontally. bexio controls that still appear in French are quoted exactly as displayed.

Practical tip

A missing button may be related to your role. Check access rights with the owner before treating it as a display issue.

Check the result

You can return to Home and download this guide from your profile in any of the four languages.



Application screenshots use fictional data. Some document labels may remain bilingual or in French.

Enter your inspector details

Access path · click in this order

Profile picture at the top right → Settings → Controller Profile

Inspector details populate document headers and several report fields. Each user should complete their own profile.

- 1 Enter your first name, last name and company name in the separate fields. Check their proposed display order.
- 2 Complete street and number, postcode, town, authorisation number K and the inspector's telephone number.
- 3 Enter your usual measuring instrument. Protocols will suggest it, and you can still change it on the relevant document.
- 4 If Inspectra offers to split older details into separate fields, review the proposal. Apply it, swap the names if necessary, or leave the existing information unchanged.
- 5 Close Settings normally and wait for saving to finish. If an error appears, keep the window open and retry. Then open a project to check the details transferred.

Practical tip

Inspector identity and billing details serve different purposes. The owner also needs to configure Financial Centre settings.

Check the result

The name, address, telephone number and K number are correct in a new report.

04 · Enter your inspector details

Profile picture at the top right → **Settings** → **Controller Profile**

⚙️ **Settings**

👤 Controller Profile

🖼️ Logo / Branding

✍️ Signature

🛡️ Security

⚡ AI & Auto

Controller Identity

Automatically saved upon typing.

A

Profile photo
JPG, PNG or WebP, up to 8 MB. The photo is cropped to a square and compressed to 128 KB or less. It does not replace the report logo.

Choose a photo

First name

Alex

Last name

Exemple

Company name

Démo Électricité

Your report header: your name, then the company.

Street and number

Rue Exemple 12

Close

Application screenshots use fictional data. Some document labels may remain bilingual or in French.

Logo, signature and AI settings

Access path · click in this order

Profile picture at the top right → Settings → Logo / Branding / Signature / AI & Auto

Personalise your documents and enable the assistance tools you want to use. Your logo and signature are images inserted into reports.

- 1 Under Logo / Branding, choose Add or Change logo. Import a sharp image, preferably a PNG with a transparent background. Check its preview after uploading.
- 2 Under Signature, import a clear image of your signature, preferably on white. Check orientation and the space around the strokes.
- 3 Use Change to replace an image, or Delete to remove it after reading the confirmation. Review the resulting document.
- 4 Under AI & Auto, enter your Google Gemini key to use the proofreader and assisted dictation. The link on this screen opens the key creation service.
- 5 Close Settings after saving. To use the proofreader, choose the relevant text or observation, open the tool and review its suggestion before keeping it.

Practical tip

Keep your key private. AI tools use an external service: submit only the necessary content and always check proposed wording and values.

Check the result

The images display correctly. AI assistance is available with a valid key and connection; an imported signature does not itself validate the report.

Create and find a client

Access path · click in this order

Clients → New Client

A client record's owner can be a person or a company. A property manager and an associated company can be linked separately without replacing the owner's identity.

- 1 Clients → New Client: search the name first to avoid duplicates. Enter a first name if needed and the surname or legal company name in Name / company.
- 2 Under Street and number, select the correct federal address suggestion. Check postcode, town and EGID; identifying the building does not identify the meter. The owner's telephone and e-mail are directly visible in the form.
- 3 Enable Property manager or **«Associate with a company»** if needed, then enter their name, address, telephone and e-mail. Disabling an association retains its details for later reactivation.
- 4 Click Create Client. Telephone and e-mail links are clickable; on phones, expand the Property manager or Company bar for details. Edit → Update lets you correct the record.
- 5 Use search, sorting and property-manager grouping in the client list. Tags and last/next inspection dates have separate permissions. Check the details copied into each new document.

Practical tip

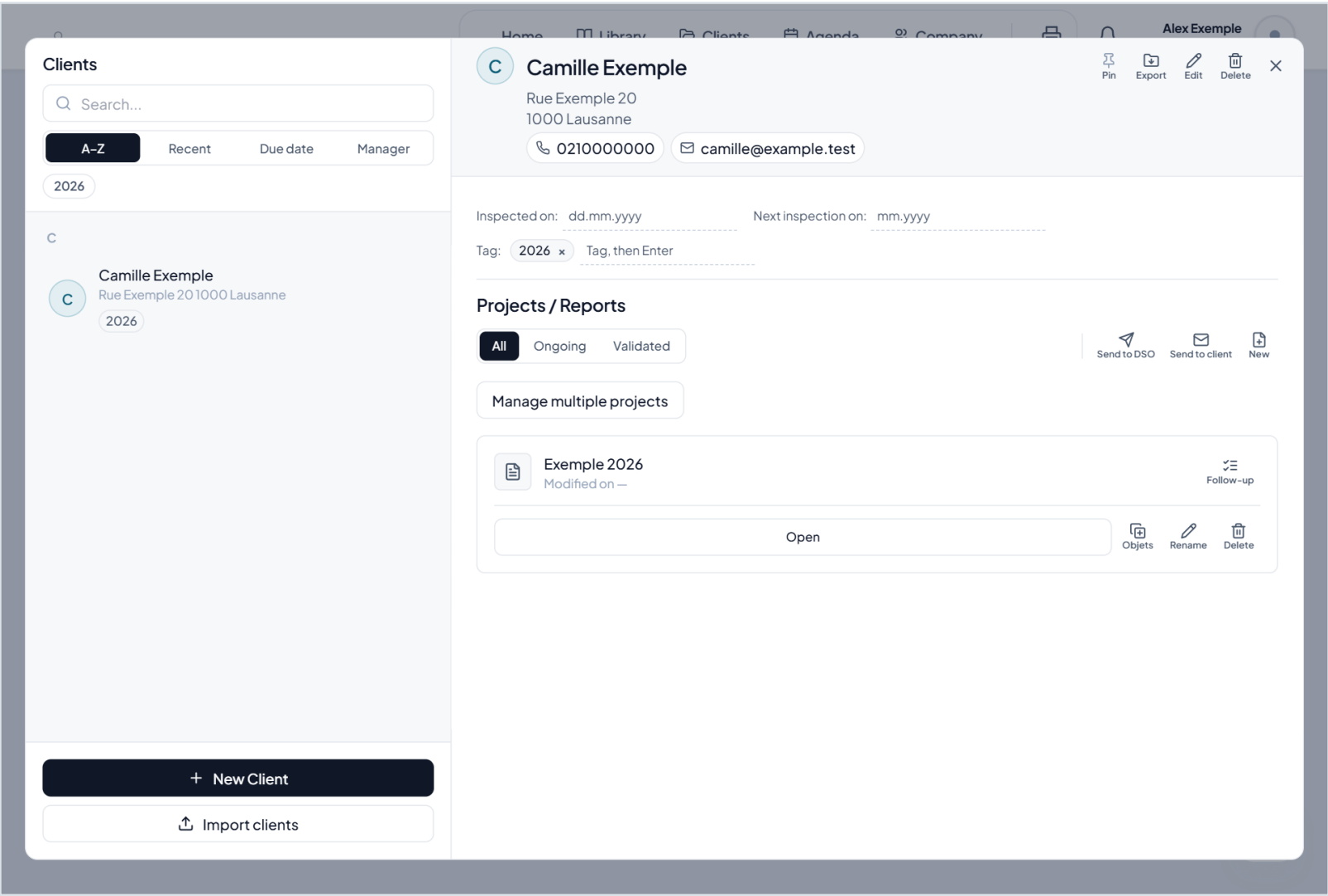
Property manager details fill the designated report fields. An associated company remains a record association; do not assume it automatically replaces the owner or invoice recipient.

Check the result

The client appears only once, with the correct address and contact details.

06 · Create and find a client

Clients → New Client



Application screenshots use fictional data. Some document labels may remain bilingual or in French.

Import a client list and find building EGIDs

Access path · click in this order

Clients → Import clients → Review records → Create selected records

Import XLSX, XLS, CSV or TSV: up to 10 MB and 2,000 rows per sheet. Creating records requires Add clients permission and a connection. Existing records are not overwritten.

- 1 Choose the file, sheet and header row. For ordinary spreadsheets, AI can suggest mapping from headers and twelve sample rows; without AI, adjust mapping manually.
- 2 Recognised French bexio exports are prepared without AI. Companies become owners under their full legal name and people retain their identity. Linked companies use the available references. The bexio contact person is not treated as the owner.
- 3 Open Review records and expand rows: check owner, street and number, postcode, town, telephone, e-mail, notes and associations. Review errors and similarities; select an apparent duplicate only if it really is a separate client.
- 4 Missing EGIDs are automatically searched in the federal register. An exact address with one unambiguous building is completed; otherwise choose the matching result or correct the address. An EGID already supplied in the file is not automatically replaced and still needs checking.

Import a client list and find building EGIDs

Access path · click in this order

Clients → Import clients → Review records → Create selected records

- 5 Continue with EGIDs already found or repeat the search for missing EGIDs. A registry outage does not prevent import without EGIDs. Confirm that you have reviewed the records, then create the selected records.
- 6 Wait for the result. After a partial interruption, saved records remain and the other rows can be retried. Reopen some records to check their details and EGIDs. The import does not transfer old report projects.

Practical tip

Keep the original file. Recognition and similarity checks help you review the data; they cannot guarantee an error-free import of every list. EGIDs identify buildings, not people.

Check the result

Selected records have the correct owners; confirmed registry matches are distinguished from addresses still requiring review.

Organise projects and folders

Access path · click in this order

Clients → Client record → New

A project contains a report made up of pages. A folder groups several projects on one client record, for example inspections within a building.

- 1 Open the client record and select New. Choose Create a project for an independent inspection or Create a folder to set up a group.
- 2 Use a clear name including the building, object and period. You can create an empty folder before adding projects.
- 3 Use the creation action inside a folder to add a project to it. Wait until creation and opening have finished.
- 4 Use Open for an existing project. Filter by All, In progress or Validated to find the report you need.
- 5 Use Rename to change a title. Before deleting anything, check the client, folder and projects involved: deletion also removes their associated data.

Practical tip

Validated projects prevent deletion of the project, its folder or its client record. A colleague's report may be available only for reading.

Check the result

Each inspection belongs to the correct client and folder. Close and reopen the project to check its location.

Create several objects from a template

Access path · click in this order

Client record → Project actions → Create multiple objects

Reuse a prepared project for similar apartments or installations. The original template is kept.

- 1 Prepare and review the source project: pages, common text, checkboxes, dates and signatures. Avoid keeping apartment-specific information in shared fields.
- 2 Open Create multiple objects for the source project. The dialog displays the template's name.
- 3 Enter one distinct name per line, for example Apartment 01, Apartment 02 and Common areas. Remove duplicate names and unnecessary lines.
- 4 Select Create objects and wait for the progress counter. With two or more objects, a folder named after the template groups the copies and original.
- 5 Open each copy and fill in its meter number, measurement protocol page 2 and its own defects. These are left blank during copying; other text, checkboxes, dates and signatures are retained.

Practical tip

After a partial failure, Retry continues the remaining objects in the same dialog. Check objects already created before restarting the entire operation.

Check the result

The template is intact and each copy has its own identity, meter and measurements. Review all retained dates and signatures.

Build and edit a report

Access path · click in this order

Open project → + / Add document

The editor displays the pages of your project. Fill editable fields directly on screen; common values may be shared across several documents.

- 1 Check the project name and client before typing. Under +, choose the required documents: safety report, inspection report, protocols, letters or PDF.
- 2 Click or tap a field to edit it. Use the provided date pickers and checkboxes instead of entering information beside the field.
- 3 Check values carried across pages: installation address, inspector, meter and dates. Changing a common value may affect several pages.
- 4 Add any necessary continuation pages. Use a page's delete action only after checking it; closing the project does not undo deletion.
- 5 On mobile, adjust zoom and scroll to reach the columns. Wait for the saving indicator before closing the project or changing devices.
- 6 Editing and saving are automatic when you have permission and the project is available. There is no finish-entry button to remember in the normal workflow. If a colleague is editing, the viewing state and their name appear; wait for availability and synchronisation.

Practical tip

A visible document may still be synchronising. The Offline chapter explains the difference between saving on this device and saving online.

Check the result

All required documents are present in a coherent order and the latest entries are saved.

10 · Build and edit a report

Open project → + / Add document

○

HomeLibraryClientsAgendaCompany

🖨️🔔

Alex Exemplealex@example.test

TEST PROTOCOL - MEASUREMENTS

as per USIE 123-5

Owner		Inspection body K no.: K-...	
Camille Exemple		Alex Exemple - Démo Électricité	
Rue Exemple 20		Rue Exemple 12	
1000 Lausanne		1000 Lausanne	
Tel.: 0210000000		Tel.:	
Management		Electrician Ino.: I-...	
Management Name		Electrician Name	
Full Address		Full Address	
Location / Object			
Inst. Address: Rue Exemple 201000 Lausanne		Object No.:	
Type:		Meter No.:	
Inspection carried out ☐ First verification (art. 24 para. 1) ☐ Final inspection ☐ Acceptance inspection ☐ Periodic inspection ☐ Sporadic inspection Date FI: Date AI/PI:		Installation Type ☐ New ☐ Existing ☐ Extension ☐ Conversion ☐ Special ☐ Temporary	Perimeter / Observations Remarks...
1. Visual Inspection			
☐ Choice/fixing of material ☐ Protection against direct contact ☐ Manufacturer instructions followed ☐ Switching/tripping devices ☐ Safety / Maintenance switch ☐ Fire barriers ☐ Wiring (sizing / layout) ☐ Circuit and overcurrent device identification ☐ Material accessibility ☐ Other...		Protection mode ☐ TN-S ☐ TN-C ☐ TN-C-S ☐ Sch III ☐ ... Earth ☐ Foundation ☐ Depth ☐ Strip ☐ Other... ☐ Main equipotential bonding ☐ Supplementary equipotential bonding ☐ BUS device layout in TP/TS ☐ BUS Line / Actuators ☐ Choice/setting of protections ☐ Schematics, warnings	
2. Tests & Measurements			
☐ PE and PA continuity ☐ Automatic disconnection on fault ☐ Rotating field 3ph sockets Grid voltage (V)		☐ RCD tests ☐ Voltage drop Remarks	
Measuring instruments		Inspection according to (standard and edition) NIBT (SN 411000:2025)	

+

Application screenshots use fictional data. Some document labels may remain bilingual or in French.

Complete the safety report (RS)

Access path · click in this order

Project → + → Safety report

The safety report identifies the installation, inspection and participants. Inspectra fills some details for you; verify them for this project.

- 1 Add the safety report and check the property owner, installation address and inspection organisation.
- 2 Enter or check the object number / EGID, installation type, meter and required references. Selecting an address does not automatically identify the correct meter.
- 3 Choose the inspection type, date and interval appropriate to this project using the fields provided.
- 4 Complete the participants, results and applicable checkboxes based on the inspection performed. Check the displayed name, K number and signatures.
- 5 Add the protocol and other necessary documents, then review the safety report in print preview before validation.
- 6 Under applied standards, select the relevant references, such as NIBT 2025, NIBT 2020 or HT 1985 where appropriate. Grey descriptions explain the entries; their presence does not automatically determine the applicable standard.

Practical tip

EGID identifies the building; it does not replace every installation-specific reference. Distinguish the client, property owner and inspected object.

Check the result

The installation, meter, dates, participants and attachments all relate to the same inspection.

11 · Complete the safety report (RS)

Project → + → Safety report

ELECTRICAL INSTALLATION SAFETY REPORT (RS)				as per CC 734.272.3
Owner Camille Exemple Rue Exemple 20 1000 Lausanne Tel.: 0210000000		Inspection body Alex Exemple · Démo Électricité Rue Exemple 12 1000 Lausanne Tel.: K-...		
Property manager Name and first name Full Address		Installer Company name Full Address Ino.: I-...		
Location / Object				
Inst. Address: Rue Exemple 201000 Lausanne		Object No.:		
Type:		Meter No.:		
Inspection carried out ☐ Final inspection ☐ Acceptance inspection ☐ Periodic inspection Date FI: Date AI/PI:	Periodicity: ☐ 1 year ☐ 3 years ☐ 5 years ☐ 5 years (SchIII) ☐ 10 years ☐ 20 years	Installation Type ☐ New ☐ Existing ☐ Extension ☐ Conversion ☐ Special ☐ Temporary	Part concerned ...	
Applied standards: NIBT (SN 411000:2025)		Particularities:		
Earthing system: ☐ TN-S ☐ TN-C ☐ TN-C-S ☐ TT				
Main overcurrent protective device IN ... A				
Overcurrent protective device at the installation connection point		I cc start	I cc end	R iso
Type, characteristic	I N [A]	L-PE [A]	L-PE [A]	[M Ohm]
The undersigned confirm that the installations carried out and / or inspected comply with current standards and codes of practice, comply with the recognized rules of technology at the time of construction, and that the inspection according to the NIV 734.27 standards (particularly art. 3 and 4) has taken place. This document forms an integral part of the inspection and must be kept at least until the next inspection, in accordance with art. 5 of the NIV. The owner or their designated representative ensures that the electrical installations permanently meet the requirements of art. 3 and 4.				
Signature Installer / Authorization Holder				
Name: ...				
Date: ...				

Application screenshots use fictional data. Some document labels may remain bilingual or in French.

Write the inspection report and letters

Access path · click in this order

Project → + → Inspection report

The inspection report collects observed defects. When adding it, choose the report alone, the two letters alone, or the complete set.

- 1 Choose Report only, Two letters only, or Report + two letters according to the pages already present. The letters are the covering letter and defect rectification notice.
- 2 On the observations page, add a defect line. Specify building, floor and room so the recipient can find it.
- 3 Type the observation or insert a library suggestion. Complete variable information and verify the associated reference.
- 4 Complete the deadline fields and review dates or time limits carried into the letters. Use precise wording appropriate to the project.
- 5 Add a useful photograph where needed and review both letters: recipient, address, subject, closing and signature. Check the complete set in preview.
- 6 Check the property-manager and installer blocks and details copied into letters. Postcode and town appear below the street; check print preview and positioning in your window envelope.

Practical tip

Adding just the letters avoids creating another observations page when the report already exists. Check existing pages before adding more.

Check the result

Each observation explains what was found and where. The letters match the report and the deadlines entered.

12 · Write the inspection report and letters

Project → + → Inspection report

INSPECTION REPORT	
Owner Camille Exemple Rue Exemple 20 1000 Lausanne Tel.: 0210000000	Inspection Body / Installer K no.: K- Alex Exemple · Démo Électricité Rue Exemple 12 1000 Lausanne Tel.:
Property manager	Installer
Location / Object	
Inst. Address: Rue Exemple 201000 Lausanne	Object No.:
Type:	Meter No.:
Periodicity:	Removal Deadline:
Inspection Date:	Inspector Name: Alex Exemple

+

ADD DEFECT

Application screenshots use fictional data. Some document labels may remain bilingual or in French.

Find and insert a NIBT observation

Access path · click in this order

Library → Search → Observation

The library helps you find wording and references. Search uses the terms entered and available context; you choose the appropriate result.

- 1 First select the report line that should receive the text. This tells Inspectra where to insert it.
- 2 Open Library and enter a few concrete words, a common abbreviation or an article number. Try a shorter query if no result fits.
- 3 Browse categories and filters, including favourites, recent items and special installations. Read the full text before inserting it.
- 4 Insert using the provided action, or drag and drop where supported on a computer. On mobile, use the available touch action.
- 5 Complete missing values with the offered lists: device, rating, conductor, unit or another detail. Read the resulting text in the report.

Practical tip

The Standards by era panel provides a chronology and dating references. It helps with consultation; your chosen observation must still fit the actual inspection.

Check the result

Text is in the correct line, its variable fields are complete and the reference has been checked.

13 · Find and insert a NIBT observation

Library → Search → Observation

Library

Manage

Search...

Buildings

Floors

Rooms

NIBT 2025

Types & equipment

All

Refine

> 01 INTRODUCTION – ALIMENTATION GENERALE84

> 02 TABLEAUX254

> 03 CANALISATIONS FIXES131

> 04 BOITES DE JONCTION16

> 05 INTERRUPTEURS52

> 06 PRISES DE COURANT66

> 07 CANALISATIONS MOBILES49

> 08 RECEPTEURS192

> 09 INSTALLATIONS SPECIALES267

> 10 NOTIFICATION76

Import articles

Add item

Application screenshots use fictional data. Some document labels may remain bilingual or in French.

Favourites and personal library items

Access path · click in this order

Library → Favourites / Categories / Item actions

Organise frequently used wording and personal items. A favourite makes content easier to find; insertion copies content into a report.

- 1 Find a useful observation and activate its star. Retrieve it through Favourites. Turn off the star to remove it from that selection.
- 2 Use categories and search to distinguish observations, locations and other available items. Select the destination field in the report first.
- 3 To add a personal item, use the category's creation action, enter a clear name and content, then save.
- 4 Use the available Edit or Rename actions to correct your items. After changing one, insert it in a practice report and review the result.
- 5 Before deleting an item, verify its title and the requested action. Return to the category to check the result.
- 6 To bring in several phrases, choose Import articles in the library. Paste text in the displayed "Title / Defect text / Article number" format, separating articles with Enter or Tab. Open the preview, review every item and confirm once. This imports library articles, not clients.

Practical tip

Keep personal wording reusable. Put details about one client in that client's report instead of a phrase intended for many projects.

Check the result

Favourites are easy to find and personal items remain understandable outside their original context.

Add and manage defect photographs

Access path · click in this order

Inspection report → Observation line → Photo

A photograph should identify the defect and its location. The application accepts one photo per defect.

- 1 Select the observation line that should receive the image. Check building, floor and room before continuing.
- 2 Choose image import or camera capture as available on your device. Allow camera access when the browser asks.
- 3 Use enough distance to identify the item, then check focus and lighting. Avoid unrelated personal information in the frame.
- 4 Wait until loading finishes. Confirm that the photo belongs to the right defect and that the text is still readable.
- 5 To remove a photo, use its delete action and read the confirmation. Before replacing it, keep any useful original on your device, then import the new image.

Practical tip

With one image per defect, choose the clearest framing. Describe separate observations as separate defects when appropriate.

Check the result

The image matches the text, stays sharp in PDF preview and does not cover any field.

Fill in measurement protocols

Access path · click in this order

Project → + → Test / measurement protocol or Electro protocol

A protocol groups inspection information and measured values. The test protocol offers page 1 only, page 2 only or both pages.

- 1 Choose the required pages. The Electro version is a separate document; confirm that you are using the correct protocol type.
- 2 Complete general information and check the instruments suggested from your profile. Enter examination results in the corresponding fields.
- 3 Identify each circuit before entering protective devices, conductors and measured values. Check units and destination columns, including lcc.
- 4 On a computer, select cells and drag the handle to continue a sequence; hold Shift while dragging to copy values. Check the destination range.
- 5 On phones, select the cell: the small bottom-right handle copies, and the bottom-left handle continues the sequence (+1). Drag to the last required cell and review the values. Undo in the protocol reverses the fill. Add a continuation page if needed.

Practical tip

A repeated value must actually apply to the selected circuits. Entry automation does not confirm that measurements were taken on those circuits.

Check the result

Each row identifies a circuit, units are consistent and all necessary fields are complete.

16 · Fill in measurement protocols

Project → + → Test / measurement protocol or Electro protocol

TEST PROTOCOL – MEASUREMENTS		as per USIE123-5
Owner Camille Exemple Rue Exemple 20 1000 Lausanne Tel.: 0210000000		Inspection body K no.: K-... Alex Exemple · Démo Électricité Rue Exemple 12 1000 Lausanne Tel.:
Management Management Name Full Address		Electrician I no.: I-... Electrician Name Full Address
Location / Object		
Inst. Address: Rue Exemple 201000 Lausanne Type:		Object No.: Meter No.:
Inspection carried out ☐ First verification (art. 24 para. 1) ☐ Final inspection ☐ Acceptance inspection ☐ Periodic inspection ☐ Sporadic inspection Date FI: Date AI/PI:	Installation Type ☐ New ☐ Existing ☐ Extension ☐ Conversion ☐ Special ☐ Temporary	Perimeter / Observations Remarks...
1. Visual Inspection		
☐ Choice/fixing of material ☐ Protection against direct contact ☐ Manufacturer instructions followed ☐ Switching/tripping devices ☐ Safety / Maintenance switch ☐ Fire barriers ☐ Wiring (sizing / layout) ☐ Circuit and overcurrent device identification ☐ Material accessibility ☐ Other...	Protection mode ☐ TN-S ☐ TN-C ☐ TN-C-S ☐ Sch III ☐ ... Earth ☐ Foundation ☐ Depth ☐ Strip ☐ Other... ☐ Main equipotential bonding ☐ Supplementary equipotential bonding ☐ BUS device layout in TP/TS ☐ BUS Line / Actuators ☐ Choice/setting of protections ☐ Schematics, warnings	
2. Tests & Measurements		
☐ PE and PA continuity ☐ Automatic disconnection on fault ☐ Rotating field 3ph sockets Grid voltage (V)	☐ RCD tests ☐ Voltage drop Remarks	
Measuring instruments	Inspection according to (standard and edition) NIBT (SN 411000:2025)	

Application screenshots use fictional data. Some document labels may remain bilingual or in French.

Import Metrel XML measurements

Access path · click in this order

Measurement protocol → Import Metrel XML / Metrel tutorial

Import transfers measurements from an XML file compatible with Inspectra's Metrel workflow. Prepare the file before starting.

- 1 In Metrel ES Manager, follow the on-screen tutorial: folder menu, Export, To XML (Basic PAT Export), then Basic PAT Export.
- 2 Save the XML somewhere accessible from your computer or phone. A measurement PDF is not an XML import file.
- 3 Open the correct editable project and target protocol. Keep a copy of existing work if you are replacing measurements already entered.
- 4 Choose Import Metrel XML, select the file and wait for the result showing installations, circuits and cells imported.
- 5 Review the tables: circuit names, installation grouping, protective devices, units and values. Fill fields missing from the source file.

Practical tip

Reimporting can replace measurements in the target area. Verify both project and file before confirming the selection.

Check the result

The circuit count matches your export. If no circuits are found, check the export format and retry with the correct XML.

Dictate a protocol and review the suggestion

Access path · click in this order

Measurement protocol → Dictation

Assisted dictation turns your description into suggested cells. It needs a configured AI key and a connection; review everything before applying it.

- 1 Open dictation in an editable protocol. If a key is missing, choose Configure AI key, then return to the protocol.
- 2 Allow microphone access. Hold the button to speak, release to pause, and continue as needed. You can also add typed text.
- 3 Dictate one circuit at a time, giving its identifier, field and unit. For a common value, explicitly state which circuits it applies to.
- 4 Select Send to AI and wait for analysis. Read what the AI heard, then inspect the circuit cards and proposed cells.
- 5 Tap chips you want to exclude. Pay particular attention to amber chips and uncertainties, then select Apply. Review the table after insertion.
- 6 Apply remains unavailable until you send to AI and receive a proposal. Audio AI filling does not work offline. After an error, keep your input, restore the connection and send a short, precise request. Use Undo in the protocol if an applied fill is wrong.

Practical tip

If the microphone is unavailable, enable it in site permissions or type your text. After a timeout, retained recordings can be submitted again.

Check the result

Only reviewed cells were applied, to the correct circuits and with the correct units.

Complete the photovoltaic protocol

Access path · click in this order

Project → + → PV protocol

The photovoltaic protocol has several pages describing the installation, checks and measurements. Entries must match the installation inspected.

- 1 Add the PV protocol and review its pages first to identify the information you need to collect.
- 2 Check the address, participants and general details. Complete the requested module, string, inverter and connection characteristics.
- 3 Fill visual inspection sections and the tests performed. Use the provided checkboxes and fields for applicable results.
- 4 Enter calculation inputs and measurements with their units. When the application calculates a result, check its inputs before relying on it.
- 5 Review every page, signatures and supporting documents. Check tables in print preview before validating the project.

Practical tip

Do not reuse another installation's specifications without checking them. PV pages may contain bilingual labels even when the interface uses another language.

Check the result

Specifications, observations, measurements and signatures are consistent across all protocol pages.

Complete the charging station protocol

Access path · click in this order

Project → + → Charging station protocol

The EV protocol records charging station details, visual checks and test entries for a charging point.

- 1 Add the Charging station protocol to the project for the relevant installation.
- 2 Enter the location, station identification and requested characteristics. Check client and inspector details.
- 3 Complete visual inspection rows according to what was checked. Read each label before selecting its checkbox.
- 4 Enter tests and measurements in their respective fields with the correct units. Add any observations needed to understand the result.
- 5 Check date, signatures, consistency with other documents and print preview. Add useful supporting documents.

Practical tip

For several stations, give each object or protocol a clear identifier. A shared address is not enough to distinguish charging points.

Check the result

The document unambiguously identifies the station and the results belonging to it.

Add external PDF documents

Access path · click in this order

Project → + → Import PDF

Add externally supplied pages, such as a plan or appendix. Imported pages appear as images inside the report.

- 1 First create or open a saved project on a client record. Check that the report is editable and a connection is available.
- 2 Choose Import PDF and select the file. Check its name to avoid adding another client's document.
- 3 Wait for pages and images to import. Avoid closing the project during this operation.
- 4 Review all added pages. Check orientation, format, order, readability and unwanted pages.
- 5 If import stops part-way, read the message: pages already imported may have been kept. Resume only the missing part to avoid duplicates.

Practical tip

Imported PDF text cannot be edited like a report field. Correct the source file and replace the appendix when necessary.

Check the result

All expected pages appear exactly once and remain readable in print preview.

Validate, archive and correct a report

Access path · click in this order

Client record → Project → Validate; validated report → History

Validation creates a timestamped version with an archive PDF and makes the report read-only. Do this after reviewing the complete project.

- 1 Check that the latest changes are saved and you are connected. Review all pages and the preview.
- 2 Choose Validate in project actions or the report's validation command. Read the confirmation and choose Validate and archive.
- 3 Wait for PDF generation and saving. Consider validation complete only after the success message and read-only banner appear.
- 4 Open History to find versions and validation or unlocking events.
- 5 To correct a validated report, the owner uses Unlock. Validate again after corrections, then check which version you are transmitting.

Practical tip

A saving error cancels validation. Keep your work open, restore the connection and retry; check the actual status before sending anything.

Check the result

The validated-and-archived banner is visible and the archive PDF matches the reviewed project.

Choose which projects need billing and sending

Access path · click in this order

Clients → client record → project → Follow-up

Not every project needs an invoice, client delivery or network-operator submission. Set these three requirements separately when creating or updating a project.

- 1 In a new project, enter the name and set the billing, client-sending and network-operator requirements, then create the project.
- 2 For an existing project, open Follow-up on its card. Enable or remove each requirement and save. Some options require the corresponding permission.
- 3 For several projects under one client, open multiple-project follow-up, select the cards and configure their follow-up. Choose Required, Not required or Keep for each action.
- 4 Non-required actions are excluded from the corresponding automatic work lists. Check the card indicators and outstanding lists. Existing invoices and recorded sends remain preserved.

Practical tip

Not required means neither sent nor paid. These options organise follow-up; they do not change validated content or determine the obligations for your case.

Check the result

Only the actions actually expected for this project remain outstanding.

Send reports to the client

Access path · click in this order

Client record → Send to client

Inspectra prepares a message and provides validated PDFs. You finish sending in your e-mail application, adding the attachments yourself.

- 1 Validate the reports to be sent, then open Send to client on the relevant record.
- 2 Select the required reports. Check names, validation dates and any previous sending records.
- 3 Review the recipient suggested from the client record. You can change it for this message without changing the client's saved address.
- 4 Choose Prepare e-mail. In your mail app, review subject and text, then attach the PDFs. The first may open automatically; use PDF buttons for the others.
- 5 Check all attachments and send from your mail app. Return to Inspectra and select I have sent to record the action.
- 6 With bexio, «**Factures à envoyer**» lets you select available invoices linked to the client. Check project, number, status and PDF, then attach them with selected reports. This does not issue a draft invoice or replace checking it in bexio.

Practical tip

Preparing an e-mail does not prove it was sent. I have sent records your confirmation; that button does not itself deliver the message.

Check the result

Your Sent folder contains the message with the correct PDFs, and the client record shows the sending entry.

Prepare delivery to the network operator

Access path · click in this order

Client record → Send to DSO / GRD

Inspectra helps select the network operator and prepare documents. Finish the upload or delivery on the indicated portal or in your e-mail application.

- 1 Open the network operator delivery screen and select the validated reports to transmit.
- 2 Check the operator suggested from the address. If several are shown or the suggestion is wrong, use Change and search for the correct name.
- 3 Read the displayed method and instructions. Use the suggested portal, or e-mail only where the screen offers that option.
- 4 Download the PDFs and transfer required details: property owner, installation, EGID, meter, inspection type and date, organisation and K number. Follow the requested file format.
- 5 Complete the portal submission or send the e-mail. Return to Inspectra and select I have transmitted.

Practical tip

Inspectra provides the validated project in one PDF. If the recipient requires separate files, prepare them before uploading. Ask the operator if no confirmed delivery method is available.

Check the result

The recipient has received the project through the chosen channel and transmission is recorded on the client record.

Print, export and keep documents

Access path · click in this order

Report → Print / Export; Client record → Export

Preview lets you check layout. Client export retrieves available validated reports into a folder or ZIP archive, depending on the browser.

- 1 Open report preview or printing. Check every page, margins, signatures, photographs and tables.
- 2 To produce a local PDF through printing, select the browser's PDF destination. Use the document's appropriate paper size and check scaling and browser headers.
- 3 To keep validated versions, open the client record and select Export. Choose a destination folder if supported by your browser.
- 4 If a ZIP archive downloads, extract it and open some PDFs. Read any messages about incomplete retrieval.
- 5 Choose an identifiable filename and storage location. Before sending, check that you are using the intended archived version rather than an old preview.
- 6 Invoices and quotes have an in-app PDF viewer. If it fails, open separately or download and check popup blocking. For window envelopes, test printing at 100% without browser headers; envelope formats vary.

Practical tip

An exported PDF is a copy for storage or sharing. It does not recreate an editable Inspectra project with all its underlying data.

Check the result

Files open and contain the expected pages. Any missing document reported by the export has been retrieved or identified.

Schedule an appointment

Access path · click in this order

Agenda → Day / Week / Month → New slot

The calendar links a time slot, client and team member. Colours and views help you understand the day or team workload.

- 1 Choose Day, Week or Month. Use arrows, the date picker and the return-to-today action to reach the required date.
- 2 Create an appointment from a free slot or the add action. Enter an activity title.
- 3 Search for the client, check the address and choose the assigned person when your role permits.
- 4 Enter date, start and end times, or use a Day / Morning / Afternoon shortcut. Choose a category and complete useful options.
- 5 Select Save. If a conflict, break or disallowed time range is reported, review the time slots and adjust the appointment before continuing.

Practical tip

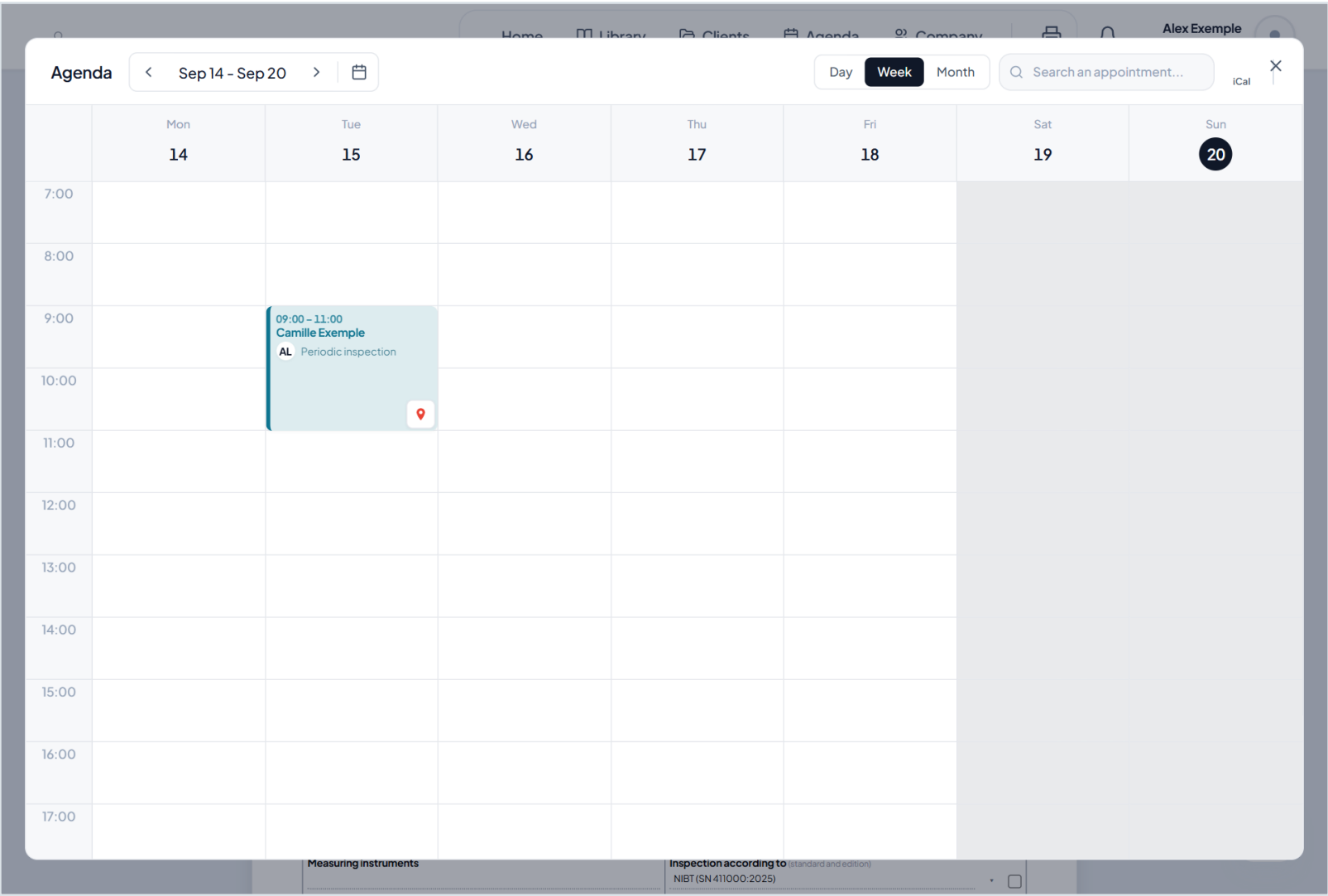
Check the address suggested from the client for each visit. The installation may differ from the correspondence address.

Check the result

The appointment appears on the correct date with the right duration, client and team member.

27 · Schedule an appointment

Agenda → Day / Week / Month → New slot



Application screenshots use fictional data. Some document labels may remain bilingual or in French.

Move, repeat and export appointments

Access path · click in this order

Agenda → Appointment → Edit / More options

You can change existing appointments and create recurring series. When changing a series, you must choose how far the action applies.

- 1 Open the appointment to edit its fields. On a computer, use drag and duration handles where available, then verify the new times.
- 2 On a phone, open the details for precise editing. Touch dragging requires selecting the appointment correctly before moving it.
- 3 Under Repeat, choose frequency and end date. Check the period before creating the series.
- 4 When editing or deleting a recurring item, choose This occurrence or the series from this occurrence, as explained by the confirmation. Do not confuse earlier appointments with the announced scope.
- 5 Use Export .ics for one appointment or upcoming appointments. Import the file into your external calendar.

Practical tip

An .ics file is a one-time export, not continuous synchronisation. A closed week may prevent editing, depending on your permissions.

Check the result

Dates and durations are correct, and only the intended occurrences have changed.

Plan the team in the global calendar

Access path · click in this order

Agenda → Team calendar → Team

This weekly view brings the team together. Viewing requires team-calendar access; editing requires separate permissions.

- 1 Open «**Team calendar**» beside Day, Week and Month. Choose the week; on phones, use the day selector or scroll horizontally.
- 2 The Team column shows a photo or initial and name. Each cell represents one person and day. Free shows available duration; Full and a pale red background indicate a filled day. Rest means a non-working day.
- 3 Read the available time ranges below the availability indicator and expand any additional ranges offered. Availability uses company or individual working hours, breaks and appointments.
- 4 Click + in the required cell to add an event for that person and day. Check assignment and times before saving.
- 5 With the required rights, drag an appointment to another day or colleague. On phones, hold it before dragging. Check the times after dropping; overlapping appointments appear side by side.

Practical tip

Showing an overlap does not resolve the conflict. An edit may be refused because of permissions, a past editing limit or a closed period.

Check the result

Each appointment belongs to the correct person and availability matches the configured working hours.

Follow due dates and prepare reminders

Access path · click in this order

Home / Notifications · Calendar · Company → Reminders

Client due dates and calendar reminders help organise follow-up. Appointment reminders and overdue invoice reminders serve different purposes.

- 1 Clients → relevant record: check last and next inspection, telephone and e-mail. After changing periodicity or a date, review the resulting due date and reminder.
- 2 Home → notification bell or Company → Reminders: open the relevant item. Appointment reminders depend on permission for own or team appointments; inspection reminders have a separate permission.
- 3 Without a telephone number, no SMS can be sent. With a usable e-mail address, an e-mail reminder remains possible. Check recipient, date, time, address and text.
- 4 Depending on SMS mode, sending is manual on the phone, assisted on request, or automatic through the configured provider. Opening a message is not enough: in manual mode send it, then confirm the action when asked.
- 5 Recorded sending is shared so other administrators do not repeat the same reminder. Check the result and errors; a disappeared notification does not prove the client read the message.

Practical tip

Set rights under Company → Team → member → Access rights. SMS settings are under Company → Reminders. A test SMS is a real send and may be chargeable.

Check the result

Reminders target the right people and due dates; reported failures have been addressed.

Understand roles and manage accounts

Access path · click in this order

Company → Accounts & plan ; Company → Team

Each person uses their own account. The owner creates accounts and sets owner, manager, secretary or team-member roles and permissions.

- 1 Open Company → Accounts & plan and check available seats. Adding a seat affects the subscription and may be chargeable.
- 2 Under Create account enter the name, e-mail and initial password, then create the account. Copy the displayed credentials and share them securely.
- 3 The confirmation states whether the verification e-mail was sent. The member must open its link before first signing in; if needed, request another link from sign-in and check spam.
- 4 Company → Team: select the person's role on their row, then expand Access rights. Set clients, reports, billing, calendar, reminders and leave according to the next chapter.
- 5 Before scheduling the member, open Company → Team → their row → Hours, then Leave. Set actual hours, employment start date and holiday entitlement. Ask them to complete their own Controller Profile and Signature.

Practical tip

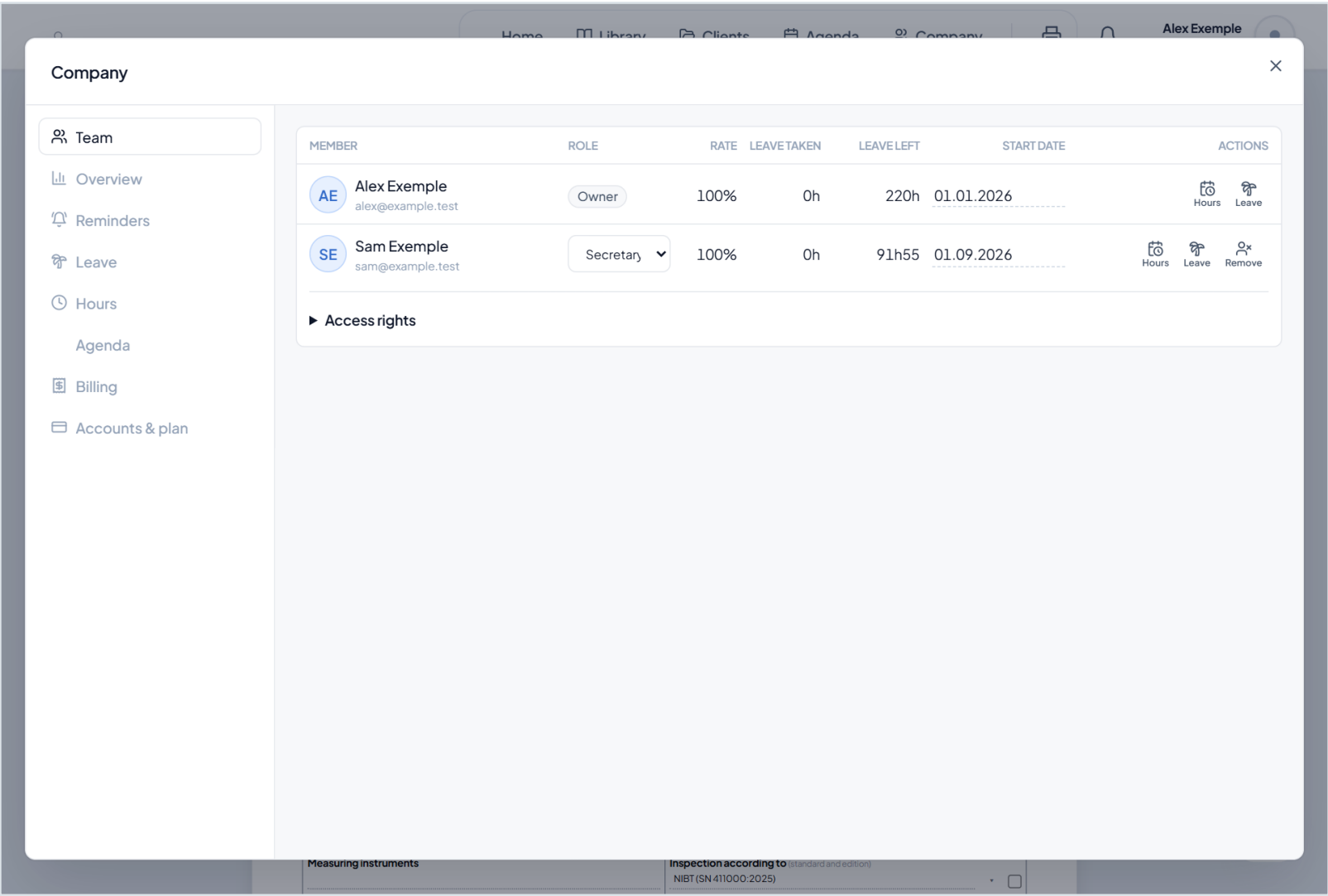
Billing permission can be assigned to a team member. It does not grant access to subscriptions or owner-only settings.

Check the result

Each person signs in with their own account and has the intended role.

31 · Understand roles and manage accounts

Company → Accounts & plan ; Company → Team



Application screenshots use fictional data. Some document labels may remain bilingual or in French.

Set permissions and editing time limits

Access path · click in this order

Company → Team → member row → Access rights

The owner sets permissions for managers, secretaries and team members. Roles provide a starting point; check the actual enabled permissions.

- 1 Open the member, check their role and access rights. Saved changes apply to that person, not the entire team.
- 2 Clients: distinguish adding clients, editing records, managing tags and changing inspection dates. Importing a list requires permission to add clients.
- 3 Reports: distinguish creating, editing accessible reports, viewing colleagues' reports and editing them. Client and network-operator sending rights are separate. Editing does not grant extra validation, deletion or unlocking rights.
- 4 Administration: enable billing and leave approval or rejection as appropriate. Company settings and subscriptions remain owner-only.
- 5 Calendar: set viewing and editing of other people's calendars, then the past editing limit: current week, 7, 30 or 365 days, a chosen date or unlimited. Earlier periods may remain viewable.
- 6 Reminders: separately allow reminders for own appointments, colleagues' appointments and inspections. Wait for the saved confirmation, then check the workflow with that person.

Practical tip

Grant only the access needed. Viewing a report does not allow editing it; seeing the global calendar does not allow moving appointments.

Check the result

Each member has the intended actions and the correct past editing limit.

Set working hours and manage leave

Access path · click in this order

Company → Hours ; Company → Team → Hours / Leave

Hours provide the basis for scheduling. Leave functions let you declare and follow absences according to your role.

- 1 Company → Hours: the owner defines reference days, hours, breaks and overtime windows, then saves.
- 2 Company → Team → member row → Hours: set their actual days and hours when different. Work rate and availability depend on these hours; check the result against the contract.
- 3 On the same row open Leave: set employment start date, holiday weeks and any credited annual carry-over. Save before processing requests. Individual hours override company hours.
- 4 Company → Leave: choose dates and day period, review the deduction and submit the request. An authorised person can approve or reject it; check the resulting status.
- 5 Company → Overview shows hours and balances for the selected period. Check results after contract changes; closed periods or limited permissions may prevent corrections.

Practical tip

Set contractual hours and employment start date before daily work. Use the dedicated carry-over field for holidays; it is not an appointment and must not be credited twice.

Check the result

Working days, absences and calendar slots are consistent for each member.

Prepare company billing settings

Access path · click in this order

Company → Billing

The owner chooses billing software under Company → Billing. Other users can use it with Manage billing permission.

- 1 Open Company from main navigation, then Billing. Choose standardInspectra billing or the offered bexio connection.
- 2 For Inspectra, enter the legal company name and address with postcode and town on a separate line. Copy IBAN and bank details from verified documents.
- 3 Check VAT, terms, deadlines and company statements, then save. Billing details are separate from the inspector profile.
- 4 For bexio: «**Connecter mon compte bexio**» → authorisation in bexio → company confirmation. Prices, VAT, accounts and templates are configured in bexio, not the standard Inspectra form.
- 5 Open Invoices in main navigation. Inspectra opens its financial centre or bexio tracking according to your choice. Check a practice document before starting real billing.

Practical tip

Changing software does not migrate old invoices. Check archives in their original software and avoid double invoicing.

Check the result

Invoice preview shows the correct identity, expected terms and payment slip when it can be generated.

Connect bexio and invoice from a project

Access path · click in this order

Company → Billing → «Connecter mon compte bexio» ; Billing → «À facturer»

Inspectra links the client, inspection and bexio document. Complete services, prices, terms, issuing and sending in bexio. No personal API key needs to be copied.

- 1 The owner clicks «**Connecter mon compte bexio**», signs in to bexio and authorises Inspectra. Check the company name, then choose «**Confirmer et utiliser bexio**». An existing bexio session may mean no new password entry is needed.
- 2 From Home, inspections awaiting invoicing, or Billing → «**À facturer**», choose the inspection and «**Facturer**». If needed, link an existing contact using «**Utiliser ce client**», or choose «**Ajouter ce client à bexio**». Check the match before creating a duplicate.
- 3 Prepare the document and click «**Continuer dans bexio**». Complete services, prices and terms there, then issue or send through bexio. Leaving the to-invoice list means a document has been linked, not that it is paid or sent.
- 4 Return to Invoices and use «**Actualiser**» to read the status received from bexio. Links and «**Voir le PDF**» open the document. The client record also retains its link to the project.

Connect bexio and invoice from a project

Access path · click in this order

Company → Billing → «Connecter mon compte bexio» ; Billing → «À facturer»

- 5 To send it with reports, open client sending and select the available invoice under «**Factures à envoyer**». Check its version and status, then actually attach the PDFs in your mail app. Avoid sending it again if bexio already sent it.
- 6 Older Spectra documents remain in «**Historique Spectra**». To switch back: Company → Billing → «**Gérer la connexion**» → «**Utiliser Spectra pour les nouveaux documents**». This neither copies nor deletes existing documents.

Practical tip

Check uncertain results with «**Vérifier le résultat**» before retrying. If the connection expires, reconnect the same company. Check the refresh date of cached views.

Check the result

The correct bexio company is connected, the document links to the correct inspection and its actual status is checked in bexio.

Create an invoice from an inspection

Access path · click in this order

Billing → New Invoice ; client record → validated project → Invoice

Standard Inspectra billing. For bexio, use the bexio connection chapter; accounting operations are completed in bexio. Invoicing from a project keeps the link between inspection and invoice. You can also create an independent invoice in the Financial Centre.

- 1 Choose Invoice on the validated inspection. If it was invoiced elsewhere, the owner can simply mark it as invoiced; this does not create an invoice.
- 2 To create an Inspectra invoice, check client, object, invoice date and service date. Leave the number blank for automatic allocation.
- 3 Add services from the catalogue or with a free line. Enter description, quantity and unit price, then check each total.
- 4 Add any discount or early-payment discount and review subtotal, VAT, total and terms. An early-payment discount depends on its payment conditions.
- 5 Select Generate Invoice and wait for saving and preview. Check the PDF and find the document in the Financial Centre.

Practical tip

Closing an invoice while entering it may discard the content. If it was saved but preview failed, resume the same invoice instead of creating a duplicate.

Check the result

The invoice has a number, the correct recipient and total; the project shows the invoice link or external-invoicing marker.

36 · Create an invoice from an inspection

Billing → New Invoice ; client record → validated project → Invoice

HomeLibraryClientsAgendaCompany

Alex Exemplealex@example.test

New Invoice

INVOICE NUMBER

F-2026-001

INVOICE DATE

15.09.2026

RECIPIENT (CLIENT)

Exemple Camille — Rue Exemple 201000 Lausanne

DATE OF SERVICE

15.09.2026

OBJECT / INSTALLATION

Rue Exemple 201000 Lausanne

Description	Quantity	Unit Price	Total Price
Installation inspection and documentation	1	380	380.00

From Catalog

+ Custom Line

Discount %

Cash Discount %

Subtotal (excl. VAT):

380.00

VAT (8.1%):

30.78

Total (incl. VAT)

410.78

CHF:

Cancel

Generate Invoice

Measuring instruments

Inspection according to (standard and edition)
NIBT (SN 411000:2025)

Application screenshots use fictional data. Some document labels may remain bilingual or in French.

Use the catalogue and quotations

Access path · click in this order

Billing → Catalog / Quotes → New Quote

Standard Inspectra billing. For bexio, use the bexio connection chapter; accounting operations are completed in bexio. The catalogue avoids repeatedly entering services. A quotation prepares a commercial proposal and can later become an invoice.

- 1 With billing permission, open Billing → Catalogue to create or edit services, descriptions, prices and available fields, then save. For bexio, use its catalogue and documents.
- 2 In an invoice or quote, choose From Catalogue and search for a service. Review its description and quantity after insertion.
- 3 For a quote, open Quotes then New Quote. Choose client, lines, any discounts and terms.
- 4 Select Generate Quote, check its preview and send the PDF through your chosen channel.
- 5 After acceptance, use Convert to invoice on the relevant quote. Check the resulting invoice, number, dates and quote link.
- 6 A native quote does not require a future service date: fill in the quote dates offered in its form. Check recipient, terms and every PDF page before sending.

Practical tip

Catalogue changes affect future insertions. Review existing documents separately; do not assume they update automatically.

Check the result

The quote and invoice match the agreed service. Conversion has not been started repeatedly by mistake.

Track and reconcile payments

Access path · click in this order

Billing → Payments

Standard Inspectra billing. For bexio, use the bexio connection chapter; accounting operations are completed in bexio. Reconciliation compares a bank file with invoices. Inspectra presents suggestions for review before recording payments.

- 1 Download a compatible camt.054 credit advice or camt.053 statement as XML from your e-banking service.
- 2 Open Payments and drop or select the file. Wait for analysis; nothing is recorded before confirmation.
- 3 Review matches: invoice, amount, date and reference. Pay particular attention to matches based only on an invoice number.
- 4 Review partial payments, overpayments, discounts and unassigned receipts. Previously reconciled entries are flagged to prevent duplicates.
- 5 Confirm selected payments, then check updated invoices. For a manual receipt, use Mark paid and enter the requested amount, especially when an early-payment discount exists.

Practical tip

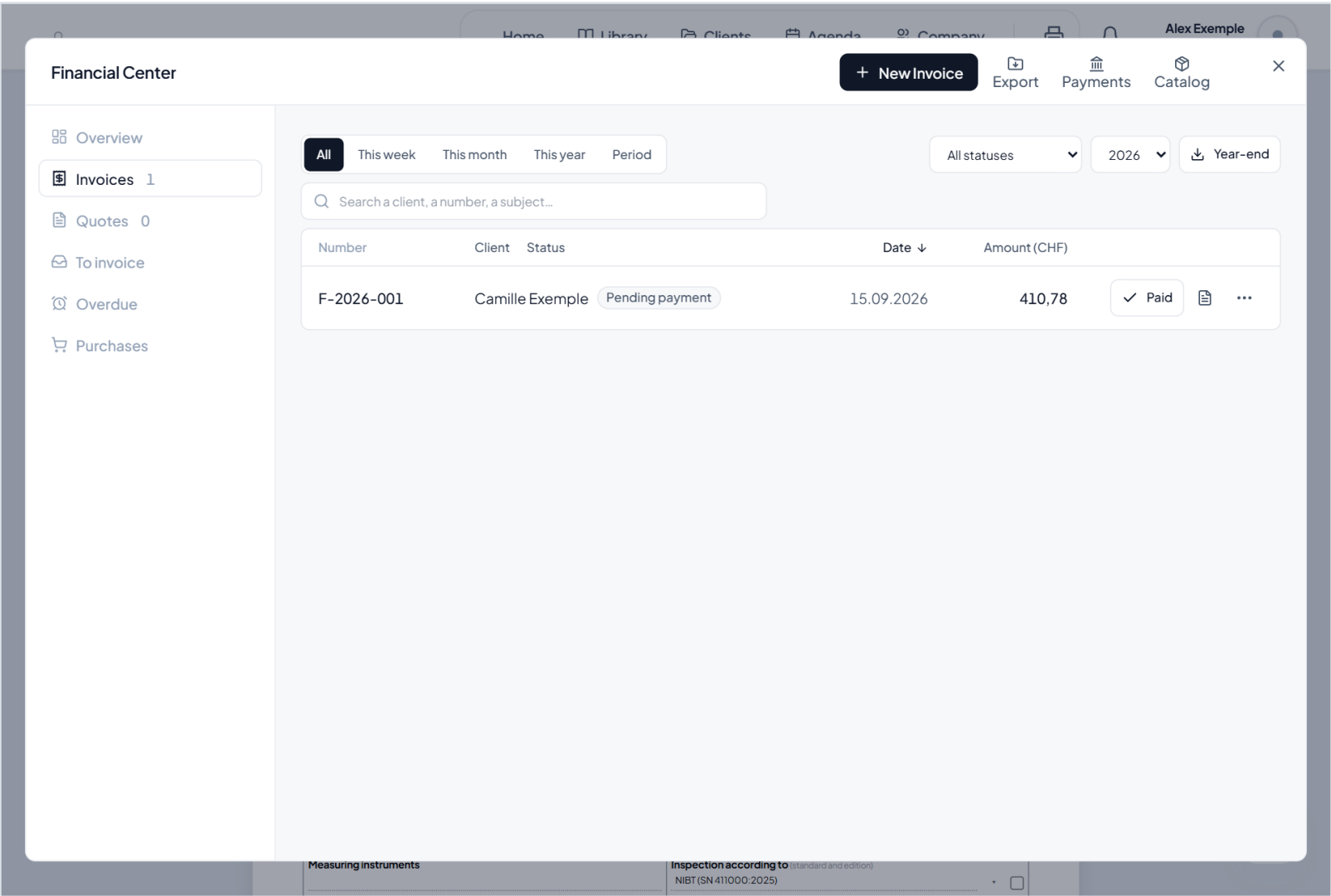
Partial payment leaves a balance open. Check and handle overpayments separately; do not confuse them with the original invoice amount.

Check the result

Statuses, received amounts and balances match actual payments. Errors and unmatched entries have been identified.

38 · Track and reconcile payments

Billing → Payments



Application screenshots use fictional data. Some document labels may remain bilingual or in French.

Remind clients and correct issued invoices

Access path · click in this order

Billing → Overdue → invoice actions

Standard Inspectra billing. For bexio, use the bexio connection chapter; accounting operations are completed in bexio. Issued documents keep their numbers. Inspectra provides separate actions for overdue follow-up, cancellation and credit notes.

- 1 Open Overdue, check the due date and recent receipts, then select the invoice to follow up.
- 2 Choose the offered reminder level: first, second or final notice. Review the confirmation and generated letter.
- 3 Print or transmit the letter through your usual channel. Creating the letter and its Inspectra history does not replace actual delivery.
- 4 To cancel an invoice, open its actions and choose Cancel invoice. Read the confirmation; the document keeps its number.
- 5 To reverse an invoice, choose Issue credit note. Review the new document and original invoice link. For a payment-recording error, use Undo payment when offered.

Practical tip

An issued invoice cannot be deleted like a draft. Choose the action matching the correction and review totals afterwards.

Check the result

History, status and linked documents clearly explain the reminder or correction.

Record purchases and prepare accounting exports

Access path · click in this order

Billing → Purchases / Overview / Export / Closing

Standard Inspectra billing. For bexio, use the bexio connection chapter; accounting operations are completed in bexio. Purchases, receipts and recurring expenses complete financial tracking. Exports provide recorded data for a selected period.

- 1 Under Purchases, choose New receipt. Enter supplier, date, amount paid, expense category and appropriate VAT rate.
- 2 Attach the PDF or a receipt photo, add reference and notes if useful, then save. Open the attachment to check readability.
- 3 Use period, category and search filters to find an expense. The owner can also enter monthly or annual recurring expenses.
- 4 Review Overview for the correct period and check amounts. Check how recurring costs and purchases are represented to avoid reading the same expense twice.
- 5 Use Export or Year-end as available and choose the financial year. Open the output, read its summary and address missing-receipt or numbering alerts.

Practical tip

Indicators depend on recorded documents. An expense missing from Inspectra cannot appear in its totals; review the records with your accounting contact.

Check the result

Purchases are documented and the export covers the intended period, with any missing documents identified.

Work offline and synchronise

Access path · click in this order

Profile picture → Offline mode

Projects opened online are prepared on the device so you can continue entering data during an outage. Prepare your work before leaving for a site.

- 1 While connected, create projects and open each once on the device you will take. Under Offline, check that they appear and are ready for offline work.
- 2 During an outage, continue entering data in the prepared project. Check the Saved on this device indication.
- 3 Keep the same device, account and open page. You can put the app in the background; while changes remain local, do not fully close the tab or page, sign out, or clear browser history or site data.
- 4 When the connection returns, keep the application open during synchronisation. Use Synchronise if necessary and wait for Saved with confirmation of online changes.
- 5 If Two versions to review, Project validated online or another alert appears, export your backup and compare it with the online version before continuing. Versions are not blindly merged.

Practical tip

Audio AI, EGID lookup, bexio, project creation, validation and sending need a connection. Restore the network and wait for synchronisation confirmation before finally leaving your work.

Check the result

All changes are confirmed online before switching devices. If local saving fails, keep the page open and export your backup.

Resolve common difficulties

Access path · click in this order

Displayed message → Targeted check

Start by reading the exact message and checking your account, project and connection. Avoid repeated reloads while entries are not yet synchronised.

- 1 Cannot sign in: check the e-mail, sign-in method and address verification. Use resend verification or Forgot password as appropriate.
- 2 Report not editable: read the header status. Validated means an archive that requires authorised unlocking; viewing with a person's name means somebody else is editing. Missing access to colleagues' reports is a separate case. Wait for availability or contact the owner.
- 3 Cannot find a client, project or invoice: clear search and filters, widen the period and check the client record or active organisation.
- 4 Photo, XML or PDF rejected: check format, the size limit shown on screen, permissions and connection. After a partial import, check what was retained.
- 5 PDF or send window missing: check downloads, blocked pop-ups and the mail app. For a persistent problem, record the profile menu version, device, action and exact message.

Practical tip

Never share your password or AI key to explain a problem. A screenshot of the message with client details hidden often identifies the affected step.

Check the result

You have identified the failing step and preserved your work. After fixing it, retry once and check the result.

Manage your account and subscription

Access path · click in this order

Profile picture at the top right → Settings → Security

Your account provides access to the organisation. Security settings concern sign-in; the owner administers the subscription.

- 1 For an Inspectra password: profile picture → Settings → Security. Enter current password, new password and confirmation, then update the password. Delete account is in the same tab with its own confirmation.
- 2 For a Google account, use Google sign-in. The Inspectra password-change form may not be offered for that account type.
- 3 The owner opens My subscription → Manage or Company → Accounts & plan to view available subscription, invoice and payment-method functions. Review the terms and amounts shown at the time of a change.
- 4 For cancellation, read the effective date. If cancellation is scheduled and you want to continue, use Reactivate subscription when offered and verify the resulting status.

Manage your account and subscription

Access path · click in this order

Profile picture at the top right → Settings → Security

- 5** Before deleting an account, keep necessary exports and handle the subscription as instructed by the application. Read the whole confirmation: owner deletion may remove the organisation, clients, reports and photos.
- 6** To simply leave the session, wait until entries are saved and use Sign out in the profile. Signing out does not delete the account.
- 7** To change your photo: profile picture → Settings → Controller Profile → Profile photo → Choose a photo. JPG, PNG or WebP, up to 8 MB; it is cropped square and compressed. It replaces neither report logo nor signature. A connection is required.

Practical tip

Inspectra subscription invoices relate to the service you use. Your own client invoices are managed separately in the Financial Centre.

Check the result

You know your sign-in method, subscription status and the consequences of the action selected.

Understand terms and statuses

Access path · click in this order

Reference to keep close at hand

These terms recur throughout the application. They describe different parts of the workflow and show what is saved or still needs attention.

- 1 Client: contact and follow-up record. Folder: group of projects for that client. Project: editable set of inspection pages. Object: identified installation or part of a building.
- 2 RS: safety report. PM: measurement protocol. Inspection report: observations and optional associated letters. PV: photovoltaic protocol; EV: charging station protocol.
- 3 EGID: federal building identifier. GRD / DSO: distribution network operator. K number: inspector authorisation number. These identifiers are not interchangeable.
- 4 Saved on this device: local copy awaiting synchronisation. Saved online: changes sent. Validated: archived read-only version. Unlocked: editable again and requiring revalidation after correction.
- 5 To invoice: validated inspection without linked or marked invoicing. Pending: money still to collect. Partial: received payment with a remaining balance. Credit note: invoice reversal document. ZIP: archive to extract; XML: structured data; ICS: calendar file.
- 6 Project follow-up: Required means an action is expected; Not required removes it from automatic lists without deleting documents. A linked bexio draft may remove an inspection from To invoice but still needs completing, issuing and sending.

Practical tip

Sent or Transmitted records follow-up within Inspectra. Also check the sent e-mail or actual submission to the recipient.

Check the result

You distinguish saving, validation, invoicing and document delivery.

A complete working day with Inspectra

Access path · click in this order

Fictional example · Alex, owner and inspector · Client Camille Exemple

Follow Alex through an inspection for Camille Exemple at Rue Exemple 20 in Lausanne, scheduled from 09:00 to 11:00. The example price is CHF 380 before configured taxes or discounts. Times and amounts illustrate organisation; they do not prescribe inspection duration or pricing.

- 1 07:45, at the office. Alex opens Home, reviews today's appointment and searches for Camille under Clients. He checks telephone, e-mail and address, creates the project "Exemple 2026" if needed, and checks the assigned inspector.
- 2 08:00, prepare the project. Alex checks his profile and adds the required documents. He opens the project on the phone used on site and waits for Ready offline. This confirms that pages and images are prepared on the correct device.
- 3 09:00, on site. Alex opens the prepared project and verifies the object, installation and meter using the available information. He fills documents as work proceeds, identifies circuits and enters results actually measured.
- 4 10:15, document observations. He locates each observation, finds appropriate wording in the library and completes it. He adds a useful photo. After XML import or dictation, he checks circuits and proposed cells. Without a connection, he checks that entries are saved on this device.
- 5 11:00, finish the visit. Alex reviews incomplete fields and adjusts the appointment to actual working times if needed. If information or checks are still missing, the report stays in progress; ending an appointment does not automatically validate it.

A complete working day with Inspectra

Access path · click in this order

Fictional example · Alex, owner and inspector · Client Camille Exemple

- 6 14:00, back at the office. Once connected, he lets the phone finish online synchronisation before resuming on a computer. He checks every page, date, deadline, measurement, signature and appendix in preview, corrects issues and validates only when the project is ready.
- 7 15:00, deliver and invoice. Alex checks project follow-up, prepares only required sends, actually attaches PDFs and records completed deliveries. Standard billing opens Inspectra; bexio prepares a linked draft to complete and send in bexio. A draft is not a payment.
- 8 16:30, close the day. The new invoice stays pending until payment arrives. Alex reconciles earlier payments actually received, adds purchase receipts and reviews inspections waiting for invoicing. He prepares tomorrow's projects, checks the next client due date and confirms his changes are online.

Practical tip

Complete the steps your permissions allow. Billing and sending may be delegated; company settings remain owner-only. Keep an incomplete report in progress.

Check the result

At day's end, each project has a clear state: incomplete, validated, delivered, awaiting invoice or invoiced. An invoice issued today is not automatically marked paid.

The complete workflow and final check

Access path · click in this order

Client → Project → Inspection → Validation → Delivery → Billing

Use this page to prepare your first project, then as a checklist before considering a visit complete.

- 1 Before the first project, complete setup in order: identity and signature, company hours, billing software, optional client import, accounts, contracts and holidays. Only then create the project and prepare it online on your field device.
- 2 During inspection: check installation and meter, complete protocols, write observations, add useful photographs and review imported or dictated suggestions.
- 3 Before validation: review identity, dates, intervals, deadlines, values, units, signatures, attachments and every preview page. Wait for synchronisation.
- 4 After validation: open the archive PDF, prepare client and network operator delivery, actually attach or upload files, then record transmissions in Inspectra.
- 5 Back at the office: invoice the inspection or mark external invoicing, review due dates, reconcile payments, record purchases and keep useful exports.

Practical tip

To learn, use a clearly named fictional client and example values. Do not send practice documents to a real recipient.

Check the result

The project is saved and validated. Only sending and billing marked required need completing; not required does not mean done. The next due date has been checked.