bexio

Service description: Document archive

Simple, secure, GeBüV-compliant: The document archive provides absolute legal certainty.

GENERAL PRODUCT DETAILS	
Requirements for audit compliance	bexio guarantees compliance with the Ordinance for keeping and retaining accounting records (GeBüV) exclusively for documents stored directly in the document archive from 1 March 2026. Important note: if a document is uploaded that, for example, has already existed for seven years and has a remaining term of only three years, audit compliance is guaranteed only from the time at which it is uploaded. With regard to the previous 7 years, legally compliant storage remains the responsibility of the customer. The requirements for full legal compliance are met only if all legally relevant documents are stored in the document archive in full compliance with these requirements.
Documents subject to archiving	As the specific documents that must be retained may vary depending on the industry, bexio recommends checking them with the competent fiduciary or lawyer.
Data protection and infrastructure	Data is stored exclusively in ISO 27001-certified Swiss data centres in strict compliance with Swiss data protection guidelines. All content is encrypted on the server side with the highest standard (AES-256), whereby internal access by bexio employees is not possible. The long-term integrity and authenticity of documents is guaranteed by

GENERAL PRODUCT DETAILS

	forgery-proof time stamps. Regular backups also ensure the complete recoverability of the document archive in the event of a system failure.
Guarantee of continuous compliance	bexio guarantees that the document archive shall continuously comply with the applicable requirements of the Swiss Ordinance for keeping and retaining accounting records (GeBüV). In the event of future changes in the law or technological adjustments to the regulatory framework, bexio will ensure the necessary system updates and recertifications in order to permanently maintain the audit compliance of the document archive.

OPERATION AND ACCESS

Uploading, modification and deletion of data	After activating the document archive, bexio will provide a dedicated storage space within a protected environment. This will enable the uploading and structured storage of electronic data in a customisable folder structure.
	To ensure immutability, a unique digital fingerprint (hash value) is created for each archived document. This value is provided with a time stamp and anchored so as to ensure security against tampering at regular intervals via an automated interface in an independent infrastructure. This recognised technical procedure allows mathematical proof to be provided at any time that a document has not been modified or tampered with since the time of archiving.
	In order to fully meet the requirements of the GeBüV, the system logs all relevant interactions in an audit-compliant logbook:
	• Logins and access to the document archive

OPERATION AND ACCESS

	- Creation, deletion and changes to user rights - Uploading of files and read accesses - Adjustments to metadata, file paths or archiving periods - Results of regular integrity checks All rights to archived data are retained in their entirety by the customer. bexio is authorised to reproduce the data solely for the purpose of storage and backup. Archived documents can be downloaded at any time. However, once uploaded, files cannot be deleted manually due to legal requirements; deletion is allowed by the system only after the defined retention period has expired.
User access	Data on user access to the document archive and administrative changes is logged in the system in a way that ensures that it cannot be changed. Only specific users with the appropriate authorisations can access the document archive and upload files. Authorisations are granted by the super admin. It is the superadmin's duty to ensure that they manage rights (assign and revoke them) and train users who have been granted access rights accordingly. However, responsibility remains with the super admin in any case.
Supported file formats	Only certain file formats can be uploaded. PDF/a is recommended. The following formats are also supported: 123, 602, abw, bib, cdr, cgm, cmx, csv, cwk, dbf, dif, doc, docm, docx, dot, dotm, dotx, dxf, emf, eps, epub, fodg, fodp, fods, fodt, fopd, htm, html, hwp, key, ltx, lwp, mcw, met, mml, mw, numbers, odd, odg, odm, odp, ods, odt, otg, oth, otp, ots, ott, pages, pbm. pcd, pct, pcx, pdb, pgm, pot, potm, potx, ppm, pps, ppt, pptm, pptx, psd, psw, pub, pwp, pxl, ras, rtf, sda, sdc, sdd, sdp, sdw, sgl, slk, smf, stc, std, sti, stw, svg, svm, swf, sxc, sxd, sxg, sxi, sxm, sxw, tga, tif, tiff, txt, uof, uop, uos, uot, vdx, vor, vsd, vsdm, vsdx, wb2, wk1, wks,

OPERATION AND ACCESS	
	wmf, wpd, wpg, wps, xbm, xhtml, xls, xlsb, xlsm, xlsx, xlt, xltm, xltx, xlw, xml, xpm, zabw, eml, msg
Data import	A limit of 12 MB per document applies, and a maximum of 1,000 files or a combined data volume of 1 GB are permitted per upload.
Data export	Individual documents can be downloaded independently from the document archive. A complete data export is charged at a flat rate of CHF 450 and can be requested via bexio support. The customer will receive a ZIP file, including the complete folder structure.
Data deletion	Documents cannot be deleted until the specified retention period has expired. If the customer has activated the four-eyes principle, deletion must also be confirmed by two users with admin rights. Without this approval, documents cannot be removed from the document archive undetected.
Support	Free support is available via our [contact form]().

CONTRACTUAL TERM & CONDITIONS

Conditions	The document archive is an inclusive service of certain bexio packages and can be used only in conjunction with a corresponding bexio package.
Packages	The document archive is included in the following bexio packages: • Optima • Ultimate
Trial phase of bexio packages	The document archive is NOT available during the trial phase of a bexio package.
Contractual term	The contractual term is linked to the aforementioned bexio subscriptions. It is not possible to continue to maintain the document archive independently without a bexio subscription.
Termination of bexio subscriptions	In the event that a bexio subscription is terminated, data will remain available in the document archive for a period of 30 days after the end of the contract. During this transitional period, documents can still be downloaded individually. Alternatively, bexio offers the complete export of archived data as a paid service (CHF 450.00). This service can be requested via bexio support up to no later than the thirtieth day of this period. After this thirty-day period has expired, all data will be irrevocably deleted and cannot be recovered.

CONTRACTUAL TERM & CONDITIONS

Activation	In the aforementioned bexio packages, the user can activate the document archive via the system settings in bexio Office. When activated, bexio provides a protected storage space that ensures the immutability of documents through digital time stamps and an audit-compliant log. Technical compliance with the Ordinance for keeping and retaining accounting records only begins with the manual upload; the customer remains responsible for the integrity of data before this point in time. In order to maintain the legally required timeliness, archiving should take place regularly (at least monthly) and no later than before each closing. Documents from previous years can be uploaded, but they do not attain retroactive conformity. Due to legal requirements, once archived, files cannot be deleted until the retention period has expired. The customer bears full responsibility for the completeness of archived materials and the secure management of access data; bexio excludes any liability for late or incomplete archiving.
Duration of archiving	As long as there is an active bexio subscription, documents will be stored for a period of ten years as standard in accordance with legal requirements. The retention period can be set for each individual document by the customer.
Subscription downgrade	If a downgrade is made to a bexio subscription in which the document archive is not included, it will still be possible to access the document archive. Files that have already been uploaded remain visible to the customer at all times and can be downloaded from the document archive. However, no additional documents can be added to the document archive.

RESTRICTIONS & FAIR USE

General information	The document archive is intended exclusively for documents relevant to the GeBüV. For this reason, it may not be used as a general cloud storage space for external data.
Storage space	bexio reserves the right to limit the storage space if usage massively and permanently exceeds the volume of an average bexio user.

DISCLAIMER AND RESPONSIBILITY

Responsibility for completeness	The customer bears sole responsibility for the selection, completeness and timely archiving of documents. bexio assumes no liability for damage caused by the absence, incompleteness or late archiving of documents.
Proof of history (chain of custody)	bexio guarantees the integrity and immutability of the documents only from the point at which they are successfully uploaded to the document archive. Responsibility for proving the authenticity in the period between the creation of a document and its uploading to the document archive lies with the customer. bexio excludes any liability for the GeBüV conformity of documents that were handled BEFORE archiving or whose complete chain of custody cannot be proven.
Legal advice	The information and features provided here do not constitute legal or tax advice. It is the responsibility of the customer to check and comply with the specific statutory retention periods and requirements of their industry or business case.

DISCLAIMER AND RESPONSIBILITY

Access and due diligence	bexio bears no liability for damage caused by the loss of access data or by unauthorised access as a result of inadequate security precautions on the part of the customer (e.g., insecure password management). Liability for documents that have accidently been incorrectly uploaded is also excluded as, due to legal regulations, these cannot be deleted.

LEGAL NOTICE

Contract components	- bexio guidelines & GTC - Contract for bexio package - Service description: Document archive
Valid as of	1 March 2026