RekordPOS | Quick guide

Find your way around in ten minutes.

The dashboard, the menu, the till and your account, in plain words.

RekordPOS looks after your sales, stock, customers and money in one place. This guide shows the screens you will use every day, so nothing feels strange on your first morning. Every picture is the real screen, from a sample shop.

IN THIS GUIDE

1. **The menu on the left**
   Every part of the business, one click away
2. **The dashboard**
   How today and this month are going, at a glance
3. **The till (POS)**
   Where sales are rung up, by scan or by tap
4. **Your account**
   Your name, password and the devices signed in

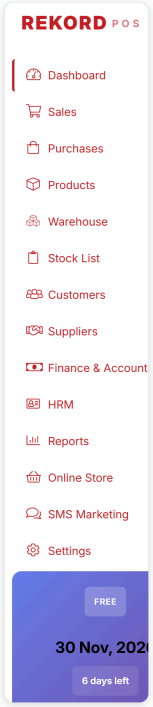
SIGN IN AT
Your shop address, with your email or sign in name

WORKS ON
Computer, tablet and phone

LANGUAGE
Plain English throughout

1 The menu on the left

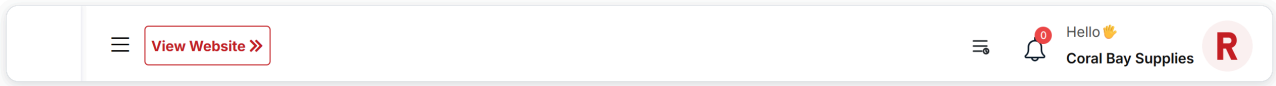
Everything lives in the menu. **Sales** and **Purchases** are the money coming in and going out. **Products** and **Stock List** are what you hold. **Customers** and **Suppliers** are the people you deal with. **Finance and Accounts** keeps the books, and **Reports** answers the questions. Click any heading to open its choices.



The menu. The coloured box at the bottom shows your plan and how many days are left.

2 The top bar

Along the top you see your shop name and a bell for notices. **View Website** opens your online store. The three lines on the left fold the menu away to give you more room on a small screen.

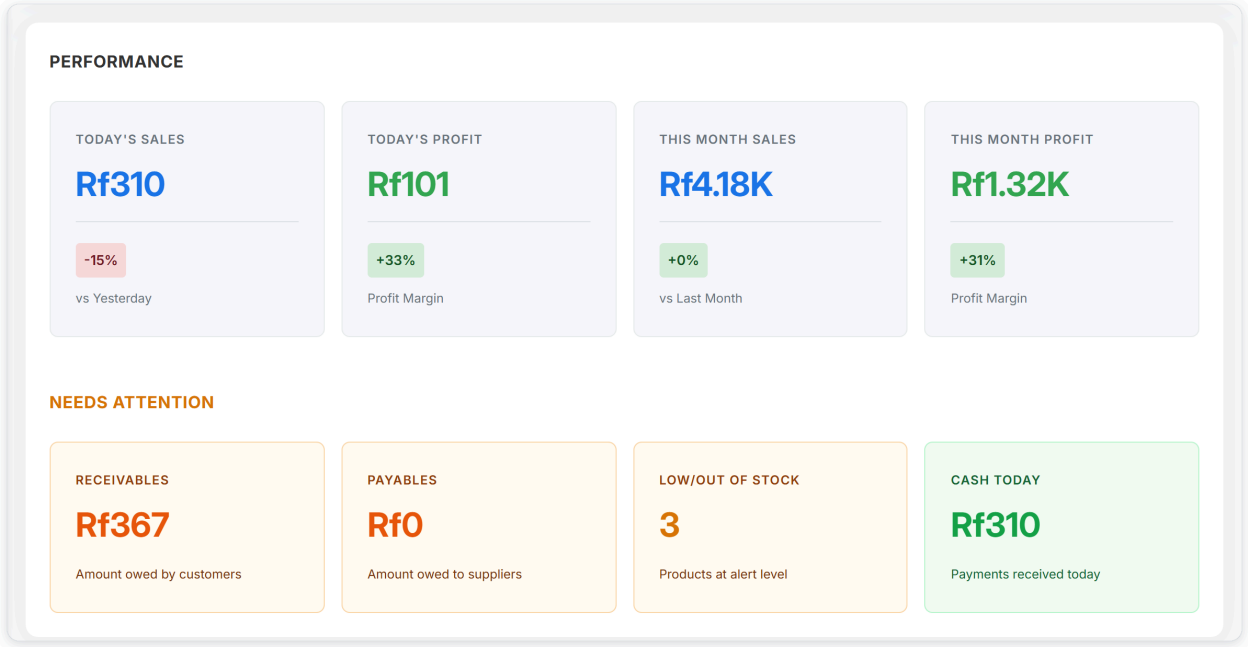


The top bar

3 The dashboard: how are we doing?

The dashboard is the first page after you sign in. The top row shows **today's sales and profit** and **this month's**, each with a small arrow telling you whether you are ahead of yesterday or last month.

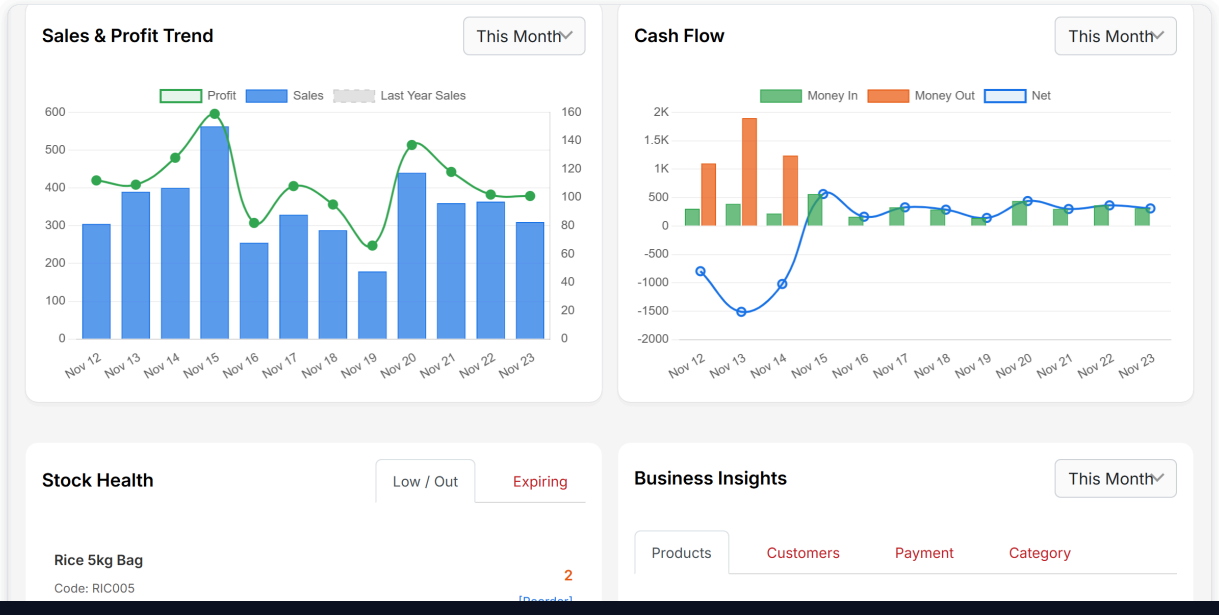
Below it, **Needs attention** lists the things worth acting on: money customers owe you (**Receivables**), money you owe suppliers (**Payables**), products that are low or out of stock, and the cash you took today.



Performance and Needs attention

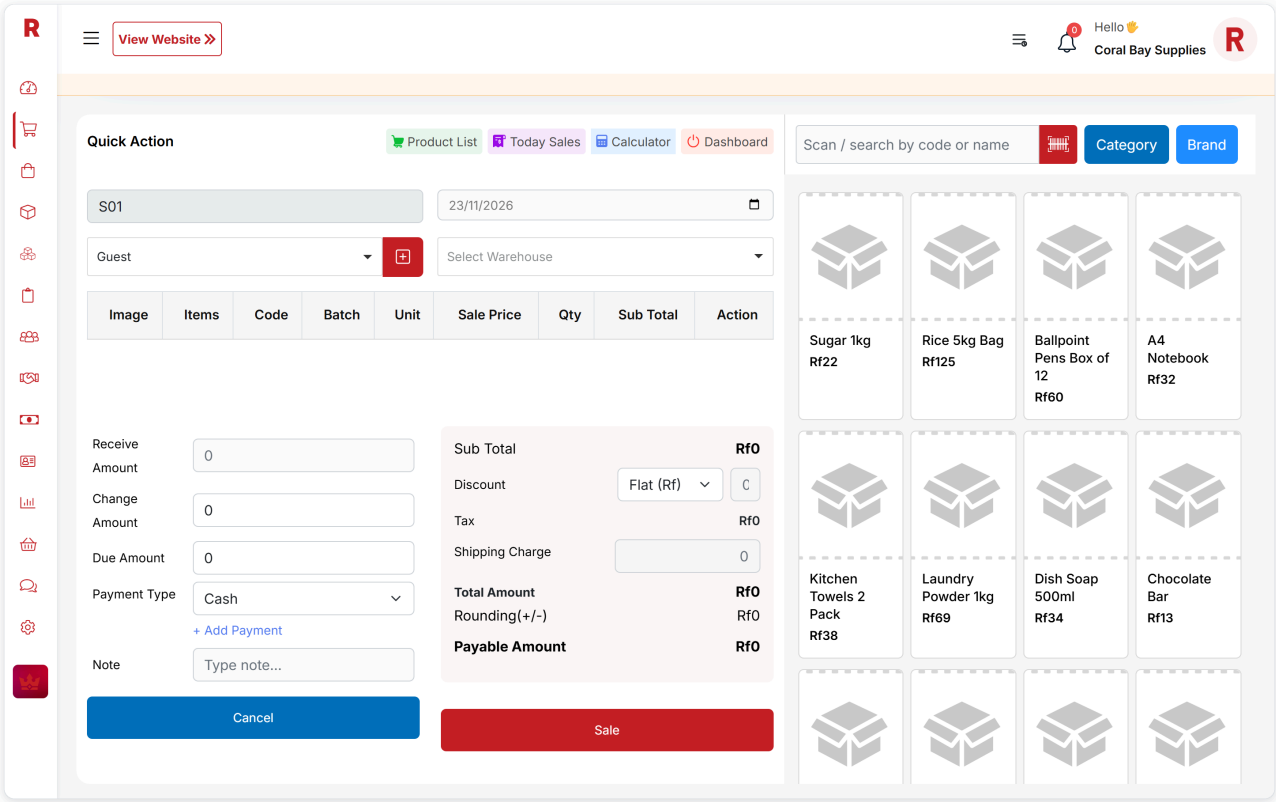
4 Charts and lists

Further down, **Sales and Profit Trend** and **Cash Flow** draw the month as bars and lines. **Stock Health** names the products running out, with a **Reorder** link beside each. **Business Insights** shows your best sellers, and the tabs at the bottom list unpaid invoices and your latest sales and purchases.



5 The till: Sales, then POS

Open **Sales** and choose **POS** to sell. Search a product by name or code, or scan its barcode, and tap it to add it to the bill. Tap **Category** or **Brand** to narrow the grid. The left side holds the bill, the customer, the payment type and the total.

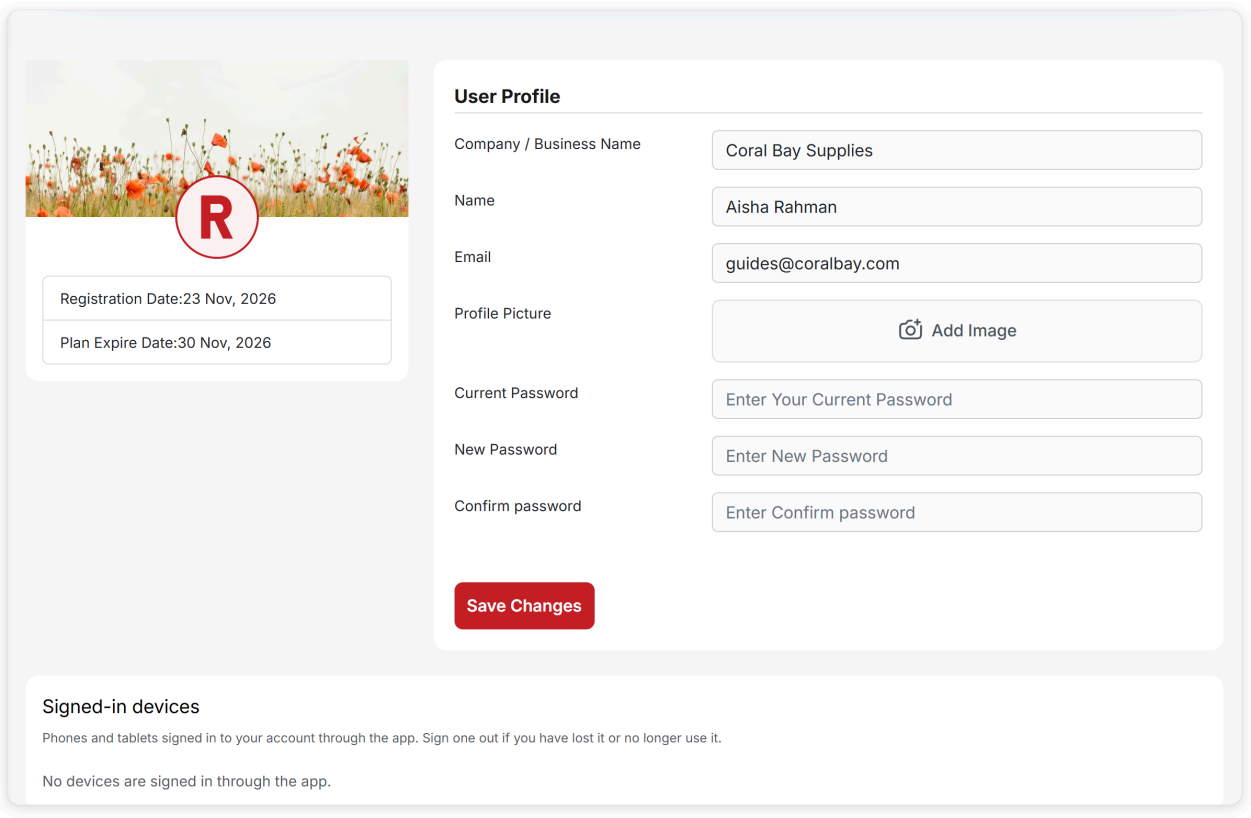


The till. Leave the customer as Guest for a walk in sale.

Selling to someone who owes you? Pick their name instead of Guest, enter what they paid now, and the rest is kept as a due that you can collect later.

6 Your account

Click your shop name at the top right, then **My Profile**. Here you change your name, your picture and your password. The panel underneath lists the **devices you are signed in on**, so you can see if somebody else has been using your login.



My Profile

7 Where to next?

Setting up your shop

Your business details, tax, currency and bank accounts. Start here before you sell.

Staff and permissions

Give each person their own sign in, and choose what they may do.

Products and stock

Add what you sell, and keep the counts right.

Selling

Receipts, returns, quotations and customers who pay later.