RekordPOS | Quick guide

Know who owes you, and collect it.

Your customers, what they have bought, and money still to come in.

Many shops sell on credit to regular customers. RekordPOS keeps the list, remembers what each person owes, and shows it on one screen so nothing is forgotten. This guide covers adding customers, reading dues, and collecting payment.

IN THIS GUIDE

1. **Add a customer**
   Name, phone, type and an optional credit limit
2. **Sell on credit**
   Any unpaid part of a sale becomes a due
3. **See who owes what**
   One list of every due
4. **Collect payment**
   Record what they pay, and the due goes down

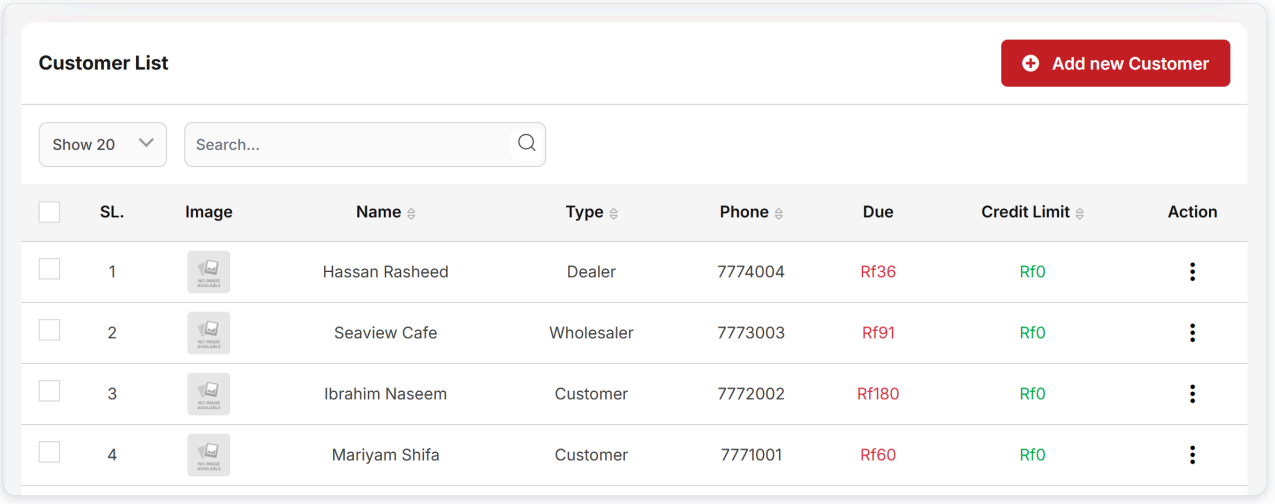
WHERE
Customers in the menu

TIME
A minute a customer

TIP
Set a credit limit

1 Your customers

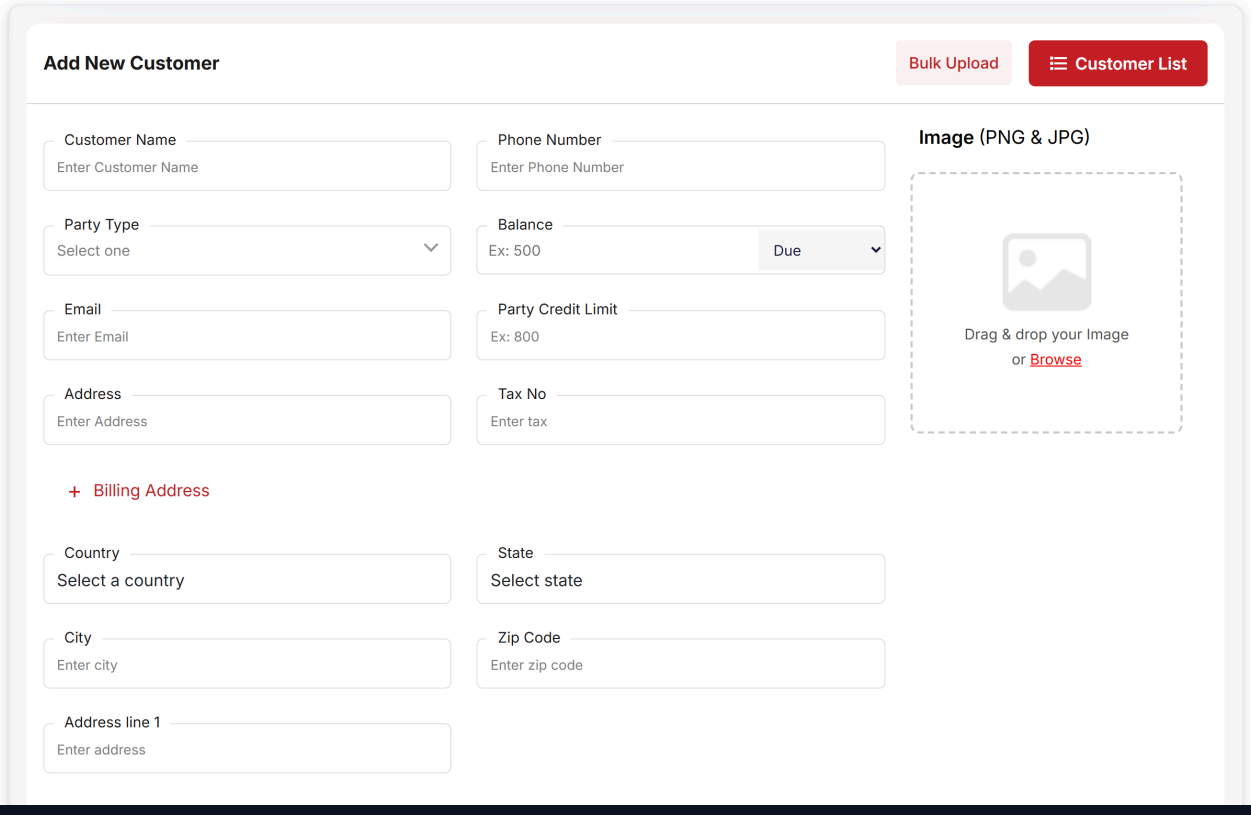
Open **Customers**, then **All Customers**. Each row shows the name, **type** (Retailer, Dealer or Wholesaler), phone, what they **owe** in red and their **credit limit**. Search by name or phone. The three dots at the end of a row open the customer to edit.



The customer list, with what each person owes

2 Add a customer

Press **Add new Customer**. Type the **name** and **phone**, and choose the **party type**. Add an email and address if you want to send documents. **Balance** is for money they already owe you from before you started using RekordPOS. **Party Credit Limit** is the most you will let them owe at once.

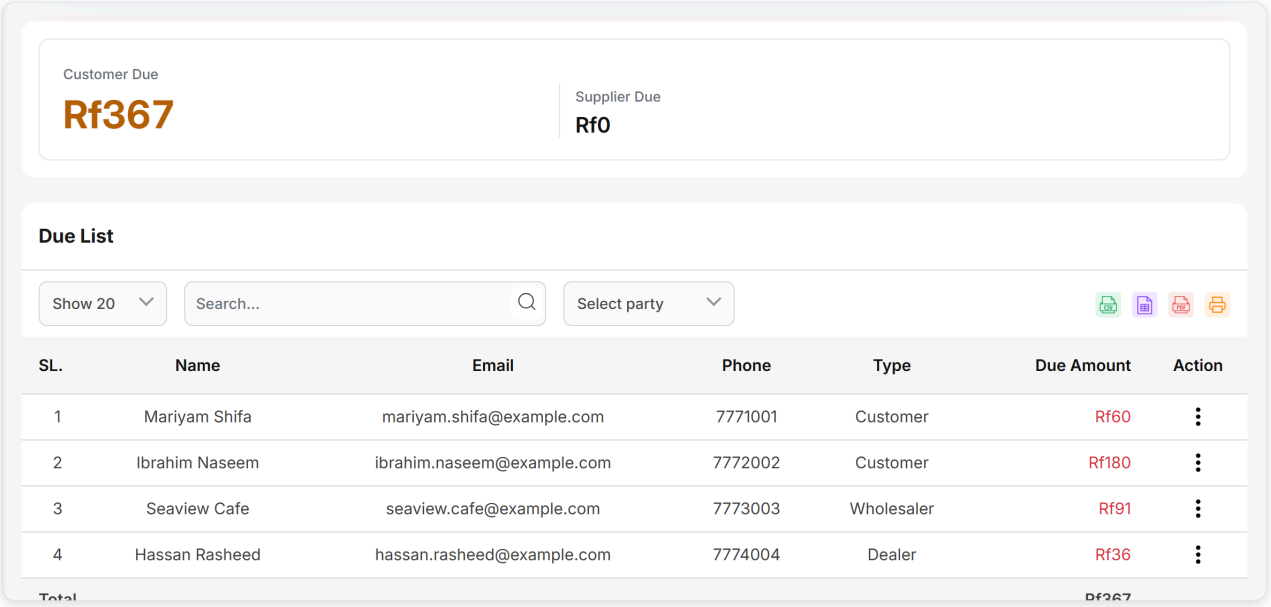


3 Selling on credit

At the till, pick the customer, then type what they actually pay now into **Receive Amount**. Whatever is left becomes their **due**. On the sales list that bill shows as **Partial Paid**, and the amount is added to what the customer owes.

4 Who owes what

Open **Finance and Accounts**, then **All Due**. At the top you see the total **Customer Due** and the total **Supplier Due**. Below is the **Due List**: each person, their phone, their type and the amount. Use **Select party** to see one person, and the export buttons to download the list.

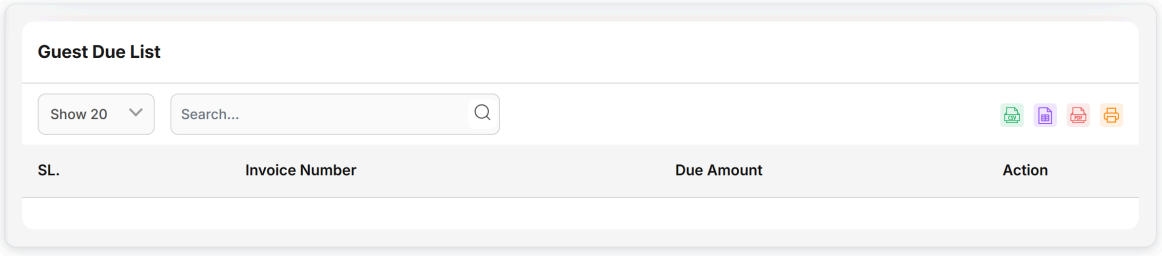


SL.	Name	Email	Phone	Type	Due Amount	Action
1	Mariyam Shifa	mariyam.shifa@example.com	7771001	Customer	Rf60	⋮
2	Ibrahim Naseem	ibrahim.naseem@example.com	7772002	Customer	Rf180	⋮
3	Seaview Cafe	seaview.cafe@example.com	7773003	Wholesaler	Rf91	⋮
4	Hassan Rasheed	hassan.rasheed@example.com	7774004	Dealer	Rf36	⋮
Total					Rf367	

Everyone who owes you, with the total at the top

5 Guest dues

Sometimes a walk in customer leaves part unpaid without being added as a customer. **Guest Due** lists those by invoice number, so they are not lost.



Guest Due list

6 Collect a payment

Open the customer's row in the due list and use its action menu to collect. Type the amount they are paying and the payment type. The due goes down by that amount and the payment is recorded. A receipt can be printed for the customer.

7 Keeping dues under control

Set a credit limit

It stops one customer owing more than you are comfortable with.

Look at the list weekly

Phone anyone whose due is old. A short call is easier than a long argument later.

Use the aging report

Receivables Aging, under the dues menu, groups dues by how old they are, so you see the oldest first.

Collect before you remove

Collect what a customer owes before you remove them from the list, so the amount is not lost.