RekordPOS | Quick guide

Find any sale, and print its paper.

The sales list, the invoice, and delivery notes.

Every sale you make is kept. This guide shows how to look back over a day, a week or a month, how to open and print an invoice, share it with a customer, and print a delivery note to send with the goods.

IN THIS GUIDE

1. **Open the sales list**
   Pick the period you want to look at
2. **Read the summary**
   Total sales, how customers paid, best sellers
3. **Open an invoice**
   Print it, save it as a PDF, or send it
4. **Print a delivery note**
   For goods that go out the door

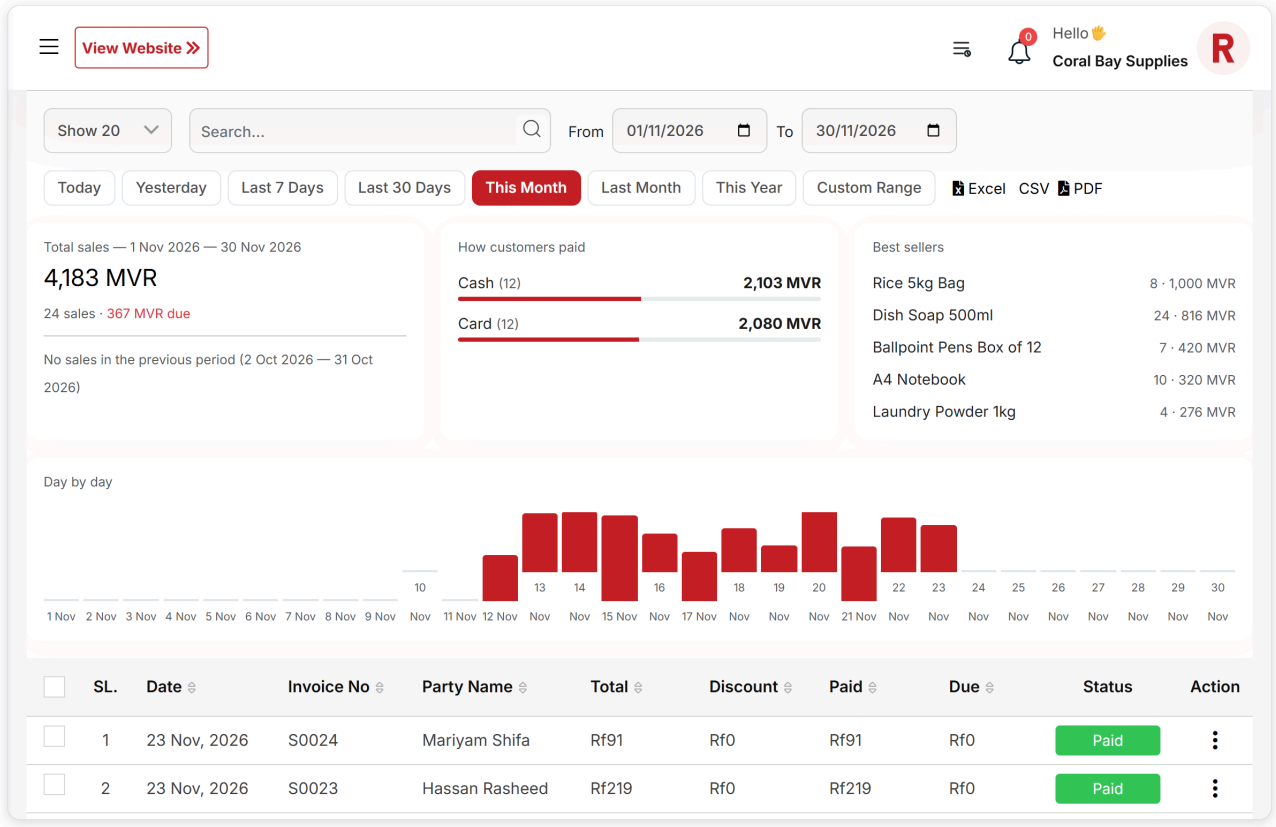
WHERE
Sales, then Sales List

TIME
A minute

EXPORT
Excel, CSV or PDF

1 The sales list

Open **Sales**, then **Sales List**. It opens on today. Use the buttons **Yesterday**, **Last 7 Days**, **This Month**, **Last Month**, **This Year** or **Custom Range** to change the period. The **Excel**, **CSV** and **PDF** buttons download what you see.



This Month, with the summary above the list

2 What the summary says

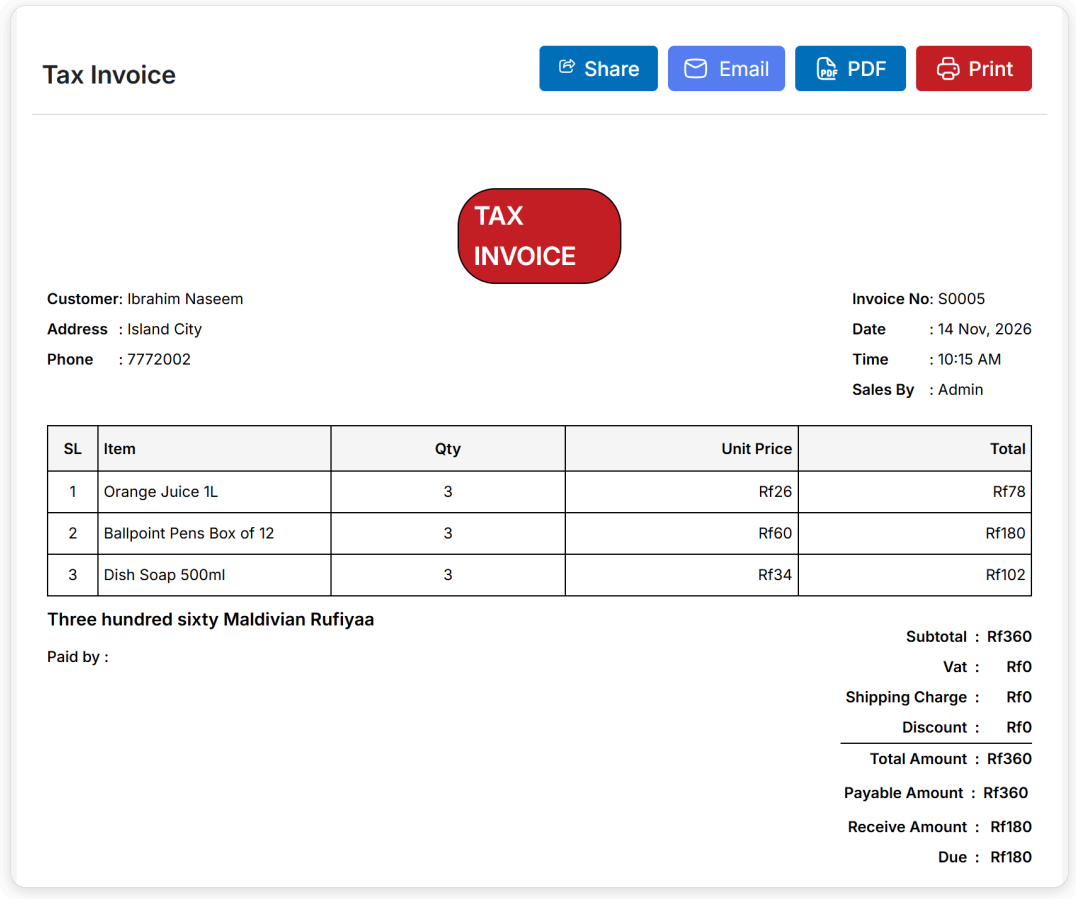
Above the list you see the **total sales** for the period and how much of it is still due, **how customers paid** (cash, card and so on), your **best sellers**, and a chart of sales **day by day**. Each sale below shows the date, invoice number, customer, total, discount, what was paid, what is due, and a status of **Paid** or **Partial Paid**.

3 The row menu

Press the three dots at the end of a sale. The menu offers **Invoice** to open the bill, **Sales Return** to take goods back, **View Payment** to see the payments made, **Edit** to change the sale, and **Delete** to remove it. Delete asks you to confirm.

4 The invoice

Choose **Invoice** to see the bill the customer gets. Across the top are four buttons: **Share**, **Email**, **PDF** and **Print**. Use Share or Email to send it to the customer, and PDF to keep a copy. The look of the invoice, its logo and the lines at the bottom come from your settings.

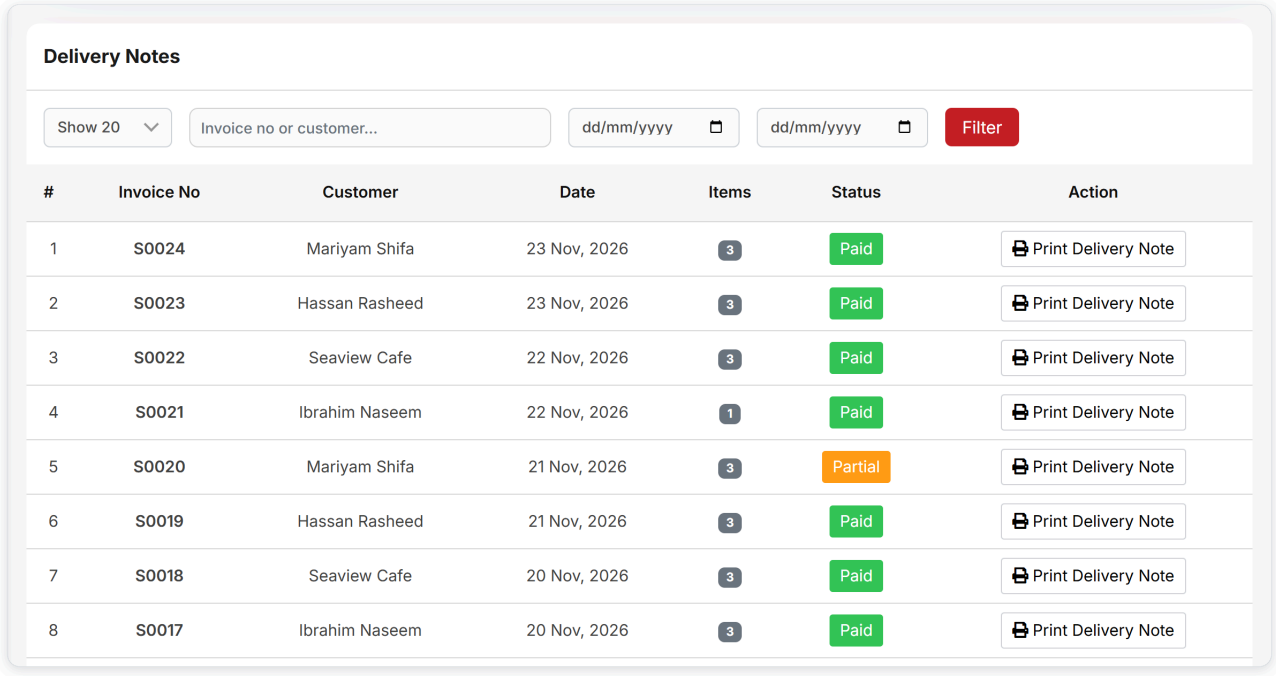


A tax invoice, with its buttons at the top

Want a different invoice design? See the guide on invoice templates, which shows how to choose the layout, the colours and what is printed.

5 Delivery notes

A delivery note lists the goods and quantities, without prices, for the person who delivers them. Open **Delivery Notes** in the Sales menu. Each sale appears with its invoice number, customer, date, number of items and status. Press **Print Delivery Note** on the one you want. Use the filters to find a sale by invoice number, customer or date.



Delivery notes, one for each sale

6 Good habits

Look at the day each evening

Open Sales List on Today and check the total against the cash in the drawer.

Chase part payments

Filter the month and look for Partial Paid. The customers and dues guide shows how to collect.

Edit, do not delete

If a bill has a mistake, use Edit so the number stays in order. Delete removes the bill altogether.

Keep PDFs

Download the month as PDF or Excel when it ends, for your records and your accountant.