RekordPOS | Quick guide

Set up your shop once, and every bill is right.

Business details, tax, currency and bank accounts.

The details you type here are printed on every invoice and receipt, and they decide how tax and money are worked out. Fifteen minutes now saves corrections later. Every screen below is the real one.

IN THIS GUIDE

1. **Settings**
   The page that holds everything about your shop
2. **Your business details**
   Name, phone, address and registration number
3. **Tax (GST)**
   Create your tax rate once, then attach it to products
4. **Currency and bank accounts**
   How money is shown and where it is kept

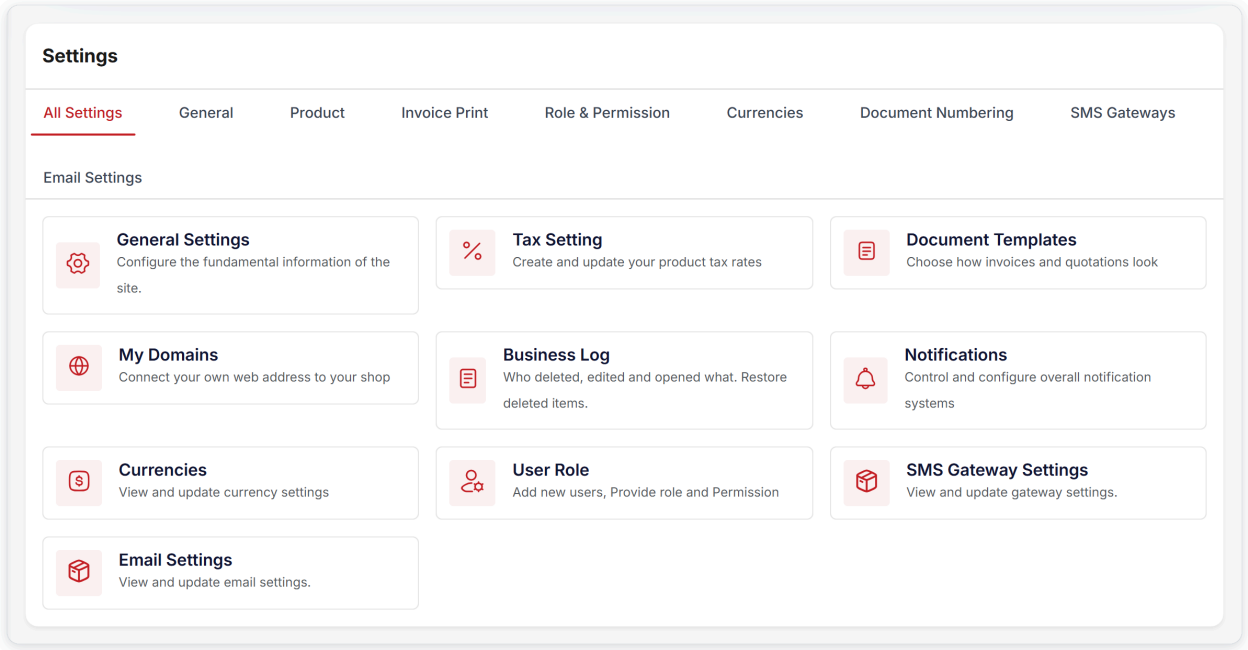
TIME
About fifteen minutes

WHO
The shop owner

NEEDED
Your registration and tax numbers, if you have them

1 Open Settings

Click **Settings** at the bottom of the menu. The page is a set of cards: **General Settings** for your business, **Tax Setting**, **Document Templates** for the look of invoices, **Currencies**, **User Role** for staff, and the message and notice settings. Start with General Settings.

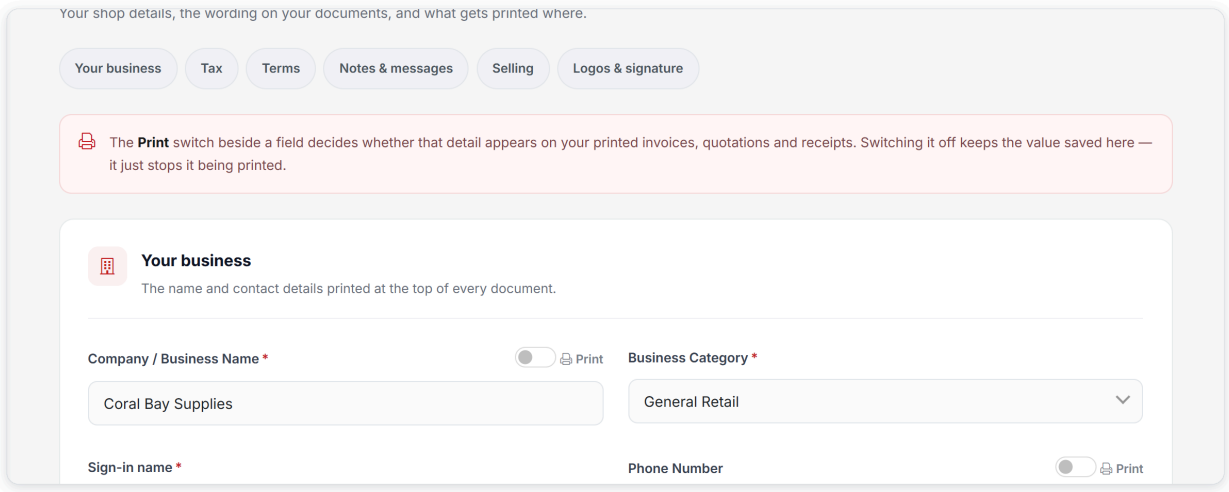


Every setting is one click from here

2 Your business details

The first card is **Your business**. Fill in the company name, phone, email, address, website and registration number. Pick your **country**, and the **state or atoll** list fills in by itself.

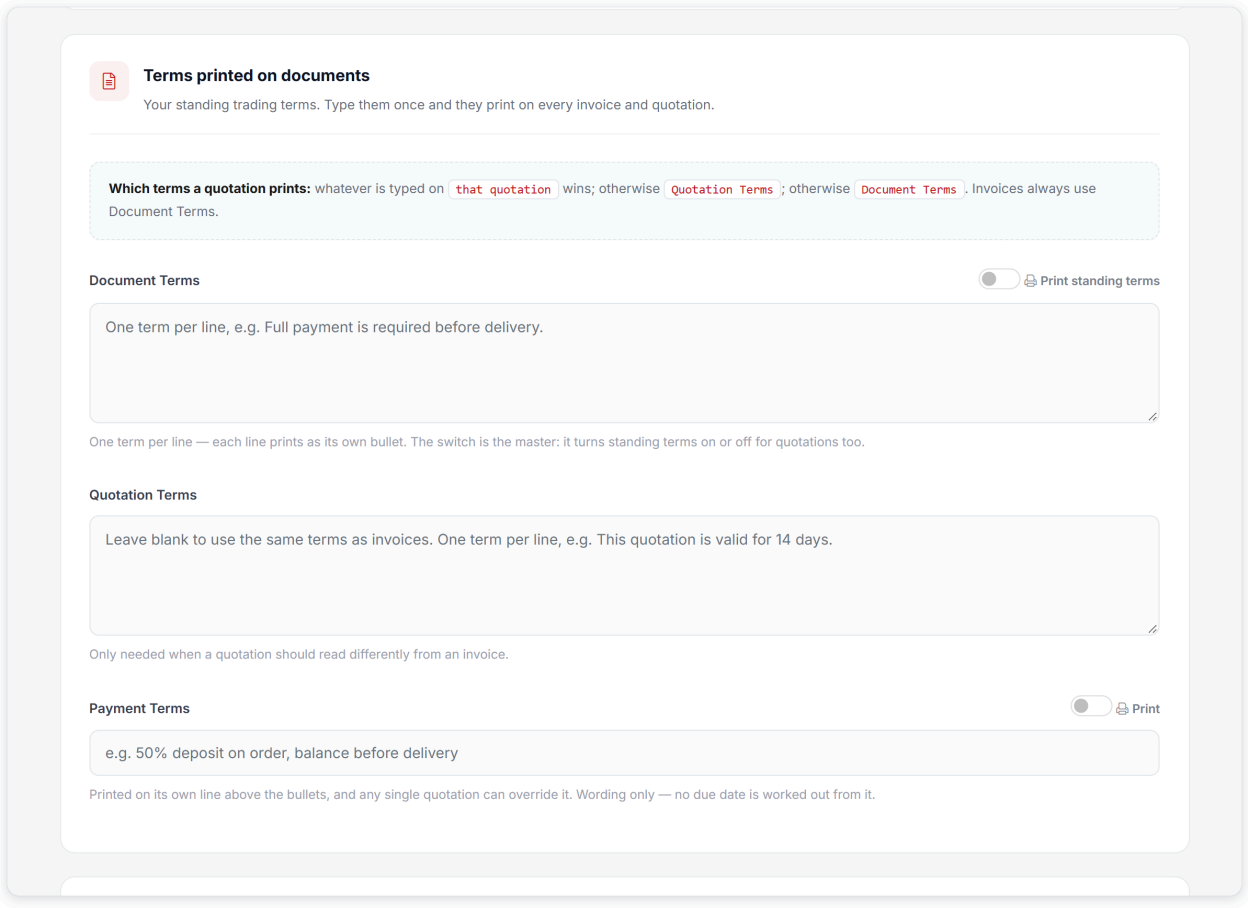
Beside many fields you will see a small **Print** switch. Switch it on and that detail appears on your invoices and receipts. Switch it off and it stays saved but is not printed. Press **Update** when you finish.



Your business. The Print switches sit beside the labels.

3 The rest of General Settings

Use the tabs at the top to jump between cards. **Terms** holds the lines printed at the bottom of every invoice, such as a payment condition. **Notes and messages** holds the thank you line on receipts. **Selling** sets how a bill is rounded and how profit is worked out. **Logos and signature** is where you upload your logo and your authorised signature.

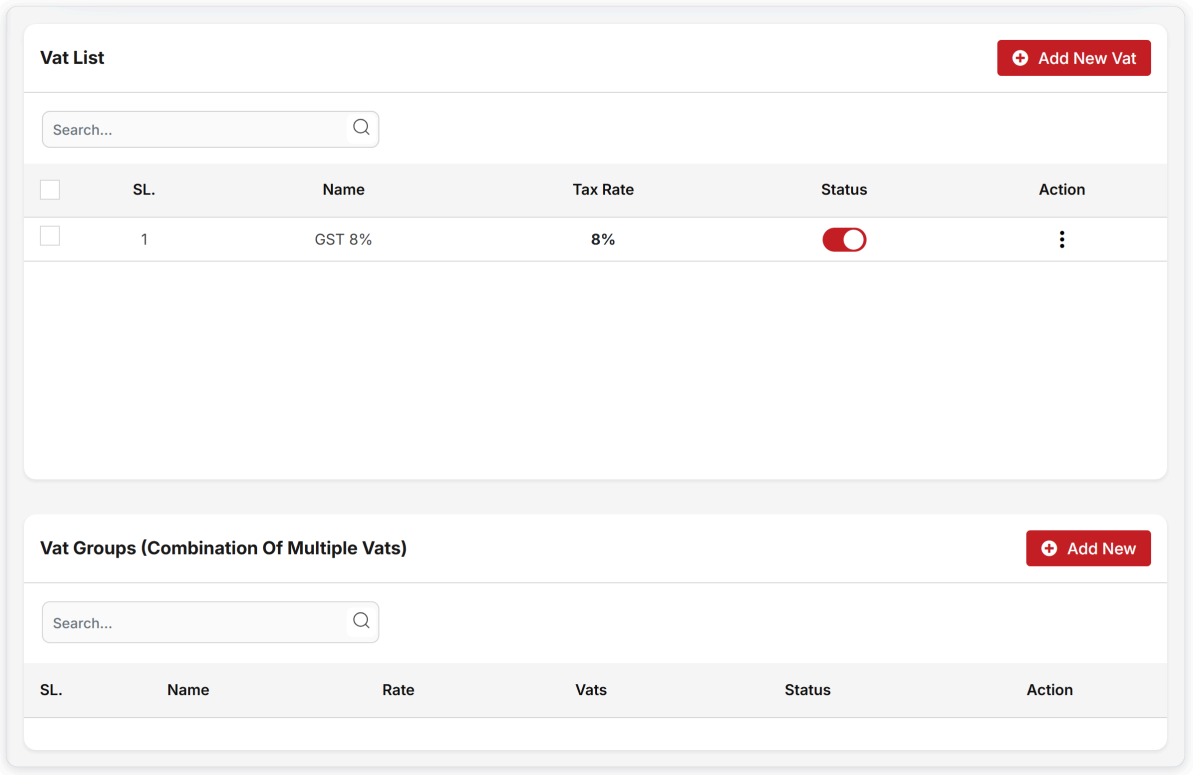


Terms and notes printed on your documents

Use the right logo. The A4 invoice and the small receipt print at very different sizes, so each has its own logo box. A wide image on a clear background suits A4, and plain black and white suits a receipt printer.

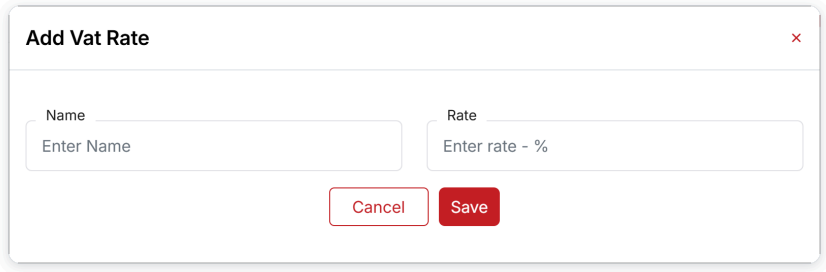
4 Tax: create the rate once

Open **Settings**, then **Tax Setting** to see the **Vat List**. Press **Add New Vat**, type a name such as GST 8% and its rate, and save. You can switch a rate off with the status switch without deleting it. When you add or edit a product you choose which tax applies to it.



The tax list. Vat Groups below it combine several rates into one.

5 Add a rate

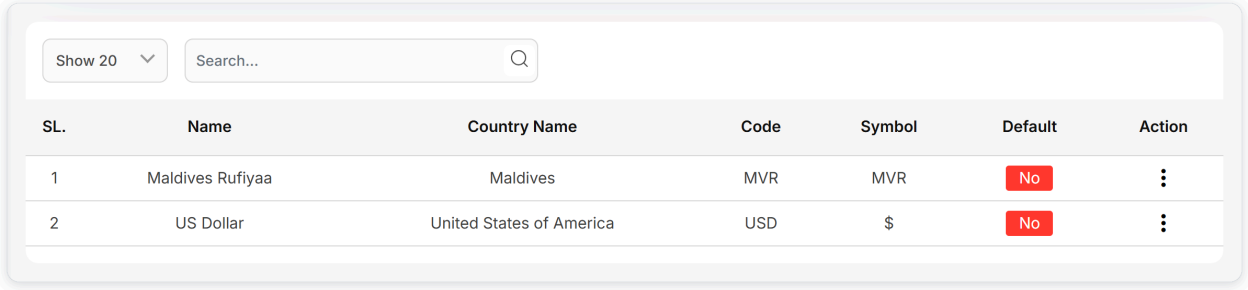


Two boxes: a name and a rate in percent

Not sure which rate to use? Ask your accountant, or check your tax authority. RekordPOS works out the figures; the rate itself is yours to decide.

6 Currency

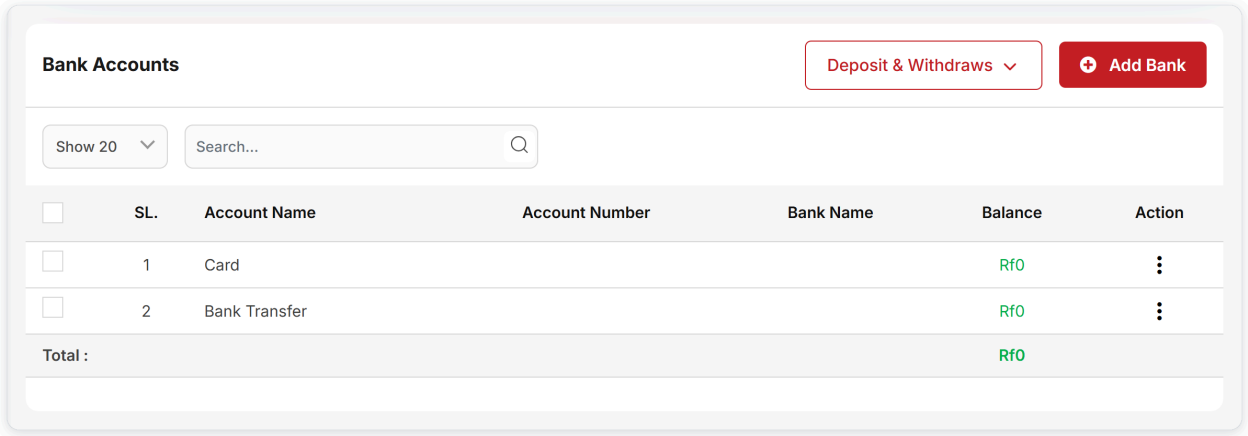
Open **Currencies**. The list shows each currency with its code and symbol. The one marked **Default** is used on every screen and every printed document, so check it is the right one before you sell anything.



Currencies. Press the Default button on the one you want.

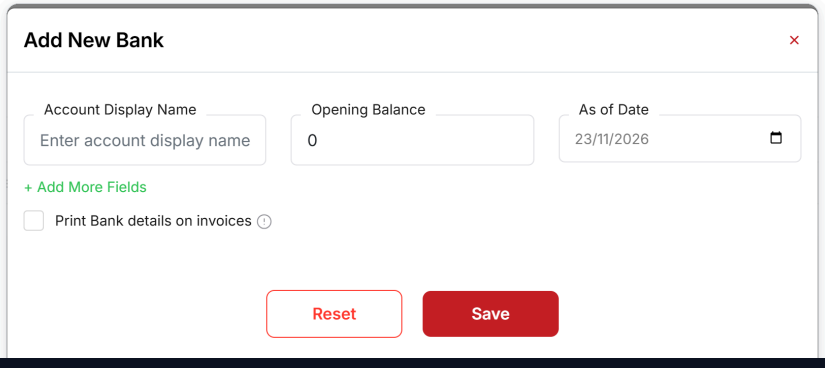
7 Bank accounts and payment types

Open **Finance and Accounts**, then **Bank Account**. Each payment method you accept other than cash has a row here, such as a card machine or a bank transfer. Press **Add Bank** to add one: give it a display name, add an opening balance and the date it applies from, and tick **Print bank details on invoices** if customers should see it.



Your payment accounts and what each holds

8 Add an account



9 Before you start selling

A quick check. Each of these takes a minute.

Is the shop name right?

It is printed at the top of every document. Look at it in General Settings.

Is the right currency the default?

Money is shown in it everywhere. Change it in Currencies.

Is there a tax rate for your products?

Add it under Tax Setting, and choose it on each product.

Do you have your payment accounts?

Add each card machine or bank account, so payments are recorded where they belong.

Is your logo uploaded?

Add it under Logos and signature, then print a test invoice to see how it looks.