LocalBiz POS

User guide

How the system works, what each part does, and how it helps you run your shop: from the first sale of the day to the end-of-day cash-up.

Cashiers
Selling, payments, credit, receipts and returns: parts 2 to 4.

Owners & managers
Stock, buying, money and reports: parts 5 to 9.

Everyone
Daily routine (page 2), getting started and quick answers: parts 1 and 12.

Shop _____

Installed on _____

Contents

Keep this guide near the till. Each part explains what a page is for, how to use it step by step, and how it helps your business.

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What LocalBiz POS does for your shop

Faster, accurate selling

Tap or scan items, sell by kg, piece, bag or bale, and take cash, M-PESA, bank, card or credit. Prices always come from the system.

Stock you can trust

Every sale, purchase, return and loss changes the stock automatically. Low-stock alerts tell you what to reorder before it runs out.

Control of credit

Each credit customer has a limit. Every purchase on credit is listed until it is paid and closed, so money owed is never forgotten.

Real profit, every day

The system knows what each item cost you, including transport, so reports show true profit, not just sales.

Fewer losses

The daily cash-up compares the cash in the drawer with what the system expected. Every important action is recorded in a log that cannot be changed.

Works without internet

Everything runs on your own computer or tablet. Records stay in your shop and are backed up automatically every 6 hours.

Your daily routine

OPEN

- Sign in
- Count the opening float (cash in the drawer)
- Check **Low stock** on the Dashboard

DURING THE DAY

- Sell every item through the till
- Record stock that arrives
- Record expenses paid from the till

CLOSE

- Do the **Cash Up**
- Make sure today's backup ran
- Lock or sign out

> **How it helps:** following the same routine every day means the stock, the cash and the reports always agree, and any problem is spotted the same day, not at the end of the month.

1 Getting started & the menu

Every person who uses the system has their own username and password. What they can see and do depends on their role.

Signing in

1. Open **LocalBiz POS**. Enter your **Username** and **Password**, then press **Sign in**.
2. The menu on the left shows only the pages your role allows. On a phone, the menu is a bar at the bottom (**Till**, **Sales**, **Customers**, **Home** and **More**).
3. Stepping away? Press **Lock** at the bottom of the menu. Your sale stays on the till, and you sign back in with your password.
4. At the end of your shift press **Sign out**. To change your own password, press **Password**.

> **Never share passwords.** Every sale, void and stock change is recorded under the person who signed in, which protects honest staff.

The pages in the menu

PAGE	WHAT IT IS FOR
Point of Sale	The till: selling to customers. Shortcut `F2` from anywhere.
Sales History	Every receipt, reprinting, voiding a mistake and customer returns.
Customers	Regular customers, credit limits, what each one owes and payments.
Cash Up	End-of-day check of cash, M-PESA, bank and card against the system.
Dashboard	Today at a glance: sales, profit, low stock and recent sales.
Products	Items you sell, their sizes, prices and wholesale prices.
Inventory	Stock on hand, receiving stock, losses, stock counts and history.
Purchases & Suppliers	Buying stock, purchase orders, suppliers and what you owe them.
Expenses	Rent, electricity, transport, wages and other running costs.
Debts	Money the shop owes others, and money customers owe the shop.
Reports	Sales, profit and loss, purchases and credit for any period.
Administration	**Staff & Roles** (who can do what), **Backup & Restore** (protecting your records), **Audit Log** (history of important actions) and **Settings**.

2 The till: making a sale

The till has the products on the left and the current sale on the right. On a phone, the products fill the screen and the green bar at the bottom opens the sale.

Adding items

1. **Find the product:** tap it, type part of its name in the search box, tap a category, or scan its barcode. Pressing `Enter` after typing a code adds it straight away.
2. **Items sold whole** (a packet, a bottle) go straight into the sale with one tap. Tap again to add another.
3. **Items with sizes or sold by weight** open a window. Choose how you are selling it under **Sell by** (for example kg, gorogoro or Bag 90 kg), then type the quantity on the keypad.
4. For loose goods you can switch to **Amount (KES)**: type the money the customer wants to spend (e.g. 100) and the system works out the exact quantity.
5. Press **Add**. The window shows the amount before you add it, and warns if there is not enough stock.

Changing the sale

- Use **+** and **−** to change a quantity, or tap the item to type a new quantity.
- Tap **×** to remove an item, or **Clear** to empty the whole sale.
- **Discounts:** staff allowed to give discounts can tap an item to discount that line, or press **%** to discount the whole sale (as an amount or a percentage).
- **Add customer** attaches a customer to the sale. A customer is needed for credit sales.

Serving several customers at once

When one customer is still shopping, press **+ New sale** to start a sale for the next customer. Each open sale appears as a tab (e.g. *Sale 1 · 3 items · 450.00*, or the customer's name). Tap a tab to go back to it. Up to **3 sales** can be open at once, and they stay open while you visit other pages. Unpaid sales are cleared if the app is closed.

The wholesale counter

Shops with retail and wholesale have a **Retail | Wholesale** switch at the top of the menu. Each device remembers its counter.

- At the **wholesale** counter an orange banner shows, and every product is charged at its wholesale price.
- Products with a wholesale minimum show it (e.g. *Min 10 kg*). The **Charge** button stays grey until each item reaches its minimum. Smaller amounts are sold at the retail counter.
- Both counters sell from the same stock. Switching counter re-prices the sale straight away. Receipts are marked **WHOLESALE**.

> **How it helps:** prices always come from the system, so every cashier charges the same price, wholesale discounts only go to real wholesale customers, and every item sold is taken off the stock.

3 Taking payment & credit sales

Press **Charge** (or F9) to take payment and choose how the customer is paying. Only the payment methods your shop accepts appear (set at installation, and changed any time in Settings → Payment methods).

METHOD	WHAT TO DO
Cash	Type the cash received, or tap **Exact** or a quick amount. The system shows the change to give.
M-PESA	Confirm the payment on the shop phone, then type the M-PESA code from the message. You can search sales by this code later.
Bank	For a bank transfer or deposit: confirm the money has reached the shop account (or check the slip), then type the bank reference.
Card	Complete the payment on the card machine first, then type its approval code.
Split	Part cash and part by another method (e.g. Cash + M-PESA): enter the cash, then the other amount and its reference.
Credit	The customer takes the goods now and pays later. See below.

Press the green button to complete the sale. A **Sale complete** window lets you print or view the receipt. The shop can choose to print a receipt automatically after every sale (Settings).

Selling on credit

1. Choose **Credit**. If no customer is attached, press **Choose customer** and pick them (or add a new one).
2. The screen shows what they already owe and how much of their credit limit is left.
3. If they pay something now, enter it under **Deposit paid now**. The rest *goes on their account*.
4. Press **Complete credit sale**.

> **Rules that protect you:** credit must be switched on in Settings, the staff member must be allowed to sell on credit, and the customer must have a credit limit. If a sale would take a customer over their limit, an administrator must approve it by signing in at the till.

> **How it helps:** every credit sale is tied to a named customer and a limit, so credit never gets out of hand, and the system, not memory or a notebook, keeps track of who owes what.

4 Sales history, voids & returns

Sales History lists every receipt. Filter by date, status or counter, or search by receipt number or M-PESA code. Open a sale to see everything about it.

View receipt

Shows the receipt to print again or share. Reprints are marked as copies.

Void sale

For a sale entered by mistake. You must give a reason. The stock goes back and the money is removed from the day's totals. Only permitted staff can void.

Return items

When a customer brings goods back: choose the items and quantities, whether they go **back on the shelf**, and how the refund is given (cash, M-PESA, bank, card, or off their account).

Credit status

A credit sale shows whether it is **Not paid**, **Partly paid** or **Paid · closed**, and when it was settled.

> **How it helps:** sales are never deleted, only voided with a reason and a name, so mistakes can be fixed without opening the door to theft.

5 Products, prices & wholesale

The **Products** page lists everything you sell, with prices, stock and sizes. Use the search box and the Active / Archived switch to find items.

Adding a product

1. Press **Add product**. Enter the **name**, choose the **category** (or press **+** to create one), and optionally the brand and barcode (scan it into the box).
2. The **SKU / item code** is created automatically when you save, e.g. *BEA-0012*. It cannot be typed or changed.
3. Choose the **base unit**: the unit stock is counted in (kg, piece, litre…). This cannot change later.
4. Enter the **selling price** and the **cost** per base unit.
5. Wholesale shops: enter the **wholesale price** and the **wholesale minimum** (e.g. 10 kg). Leave the price empty to use the retail price.
6. Set the **low-stock alert** level and the **opening stock** (what you have right now), then press **Add product**.

Other selling units (sizes)

Sell the same stock in other sizes, for example **Bag 90 kg**, **Gorogoro (2 kg)**, **grams**, **Bale (12)** or **Carton (12)**. Use **+ Add unit…** or a quick-add button, then say how much of the base unit it contains.

- **Price empty:** the size is charged at the base price × its size (e.g. 2 kg × 140).
- **Price set:** the size has its own price, for example a cheaper price per bag. Wholesale shops can also give each size its own wholesale price.
- Stock is always kept in the base unit. Selling one Bag 90 kg takes 90 kg off the stock.

Categories, editing and archiving

- **Categories** groups products on the till and in reports (e.g. Beans, Rice, Flour, Household).
- Press the pencil to edit a product. Price changes are recorded in the audit log.
- Products are never deleted. **Archive** an item you no longer sell: it leaves the till but its history stays. Restore it any time.

> **How it helps:** one product can be sold loose, by the gorogoro and by the bag, each at the right price, while the stock stays exact in kilograms. Correct costs mean every report shows true profit.

6 Inventory & receiving stock

The **Inventory** page shows the stock of every product, its value, and which items are low or out of stock. Tick **Low stock only** to see what to reorder.

Receiving many products at once

1. Press **Receive stock**. Every product is listed with its current stock.
2. Choose who it came from: a supplier, or **No supplier account (paid in full)** with an optional name.
3. Next to each product that arrived, choose the unit (kg, bag, carton…), type the **quantity received** and check the **cost per unit** (the last cost is filled in for you). Leave the others empty.
4. Check the total at the bottom and press **Receive**. Everything is saved as one purchase.

Adjusting one product

Press **Adjust** next to a product and choose the reason:

REASON	WHEN TO USE IT
Receive stock	A small delivery of one item.
Opening stock	Stock you had before using the system.
Stock count	Set the stock to what you physically counted. The difference is recorded.
Damaged · Expired · Wastage	Spoilt or torn items, past expiry, spillage when weighing, pests.
Correction (remove)	Fix a mistake in the recorded stock.

Movement history shows every change to a product's stock: each sale, purchase, return and adjustment, with the date and the person.

> **Count regularly.** A stock count once a week for fast-moving items (and monthly for the rest) shows losses early, while they are still small.

> **How it helps:** you always know what is on the shelf and what it is worth, and losses from damage or wastage are recorded instead of quietly disappearing.

7 Purchases, suppliers & purchase orders

Purchases & Suppliers has three tabs: **Purchases**, **Purchase orders** and **Suppliers**. Recording what you buy keeps stock, costs and supplier balances correct.

Two ways to record a purchase

From a supplier

- Choose the supplier and their invoice number
- Add the items, quantities and costs
- Pay all, part or nothing now; the rest is owed to the supplier

Quick purchase

- For a farmer or walk-in seller with no account
- Optionally note who sold it (**Bought from**)
- Always paid in full

- **Transport, loading & packaging** costs are spread over the items, so each item's cost is its true landed cost.
- **Never stocked it before?** Press **New product** inside the purchase: enter the name, category, unit and selling price. The SKU is created and the cost comes from the purchase.
- Open a purchase to **Return to supplier** (bad goods) or **Pay supplier**.

Purchase orders

1. On the **Purchase orders** tab press **New purchase order**. Choose the supplier, the delivery date and any notes, then add the items with the agreed prices. Press **Create order**.
2. Press **Print** or **Save PDF** to send a professional order with your logo and details. On a tablet, **Share** sends it by WhatsApp or email.
3. Press **Mark as sent**. You can still **Edit** or **Cancel order** until the goods arrive.
4. When the delivery comes, open the order and press **Receive goods**. The purchase is filled in from the order; correct any quantity that differs and save. Stock goes in and the order closes as **Received**.

Suppliers

The **Suppliers** tab lists everyone you buy from and how much you owe each one. Open a supplier to see their statement, print it or save it as PDF, and record payments.

> **How it helps:** purchase orders make ordering clear and professional, deliveries are checked against what was ordered, and you always know what you owe each supplier and what your stock truly cost.

8 Customers, credit & debts

The **Customers** page keeps your regular customers, their credit limits and everything they owe.

Adding a customer

Press **Add customer**. Enter the name and phone number (at least 10 digits, e.g. 0712 345 678). To allow credit, an administrator sets a **Credit limit**: the most this customer may owe at any time. Leave it empty for no credit.

What a customer owes

Open a customer to see the **Taken on credit** list: every purchase they took on credit, with the items, and its status.

STATUS	MEANING
Not paid	Nothing has been paid for this purchase yet.
Partly paid	Some has been paid; the remaining amount is shown.
Paid · closed	Fully paid. Hidden by default; press *Show paid* to see them.

Recording a payment

1. Press **Pay** next to the purchase being paid. The amount still owed is filled in.
2. Choose how they paid (cash, M-PESA…) and add the M-PESA code, then press **Record payment**.
3. A general payment (not for one purchase) pays off the oldest purchases first. The money appears in the day's takings and in the cash-up.

Print or share a customer's **statement** to show them exactly what they owe and why.

Debts

- **We owe:** people the shop owes apart from suppliers, such as a landlord or a loan. Use **Add someone we owe**, then **Record money owed** and record payments as you pay.
- **Owed to us:** every customer who owes the shop money, in one list.

> **How it helps:** no more lost notebooks. Every shilling owed, to you or by you, is listed with dates, so you can follow up and plan your cash.

9 Money: expenses, cash-up & reports

Expenses

Press **Record expense** for rent, electricity, transport, wages and other running costs: choose the category, amount, how it was paid and the date. Use **Categories** to add your own. A wrong entry is **voided** with a reason, never deleted. Expenses are taken off your profit in the reports.

End-of-day cash-up

1. Open **Cash Up** and check the **Day** and the **Opening float** (cash you started with).
2. Count the cash in the drawer. Either **count notes & coins** (type how many of each) or **enter the total**.
3. For each other way the shop is paid, enter what came in today: **M-PESA** (from the shop phone's messages or statement), **Bank** (from the bank app, SMS alerts or statement) and **Card** (from the card machine's end-of-day report).
4. Enter any **cash taken out** (banked or given to the owner).
5. The system shows what it expected for cash and each method, and any **difference** (short or over). Add a note to explain, then press **Save cash-up**.

> **Do it every day.** A small difference found today is easy to explain. A month of differences is not. Saved cash-ups cannot be changed.

Dashboard and reports

The **Dashboard** shows today's sales, transactions, gross profit, stock value, low-stock items, top products and the last 14 days.

Reports cover any period (show by day, week or month). Press **Print** or **Save PDF** to keep a copy.

REPORT	WHAT IT TELLS YOU
Sales	Sales by day, product, category, cashier, payment method and counter (retail / wholesale).
Profit & loss	Revenue, cost of goods sold, gross profit, expenses and **net profit**.
Purchases	What you bought, from whom, at what landed cost, and what is unpaid.
Who owes what	Who owes the shop money and how much.

> **How it helps:** you see where the money comes from and where it goes, which products make the most profit, and whether the business is really growing.

10 Staff, security & settings

Staff & roles

On **Staff & Roles**, the administrator adds each person with **Add staff member** (full name, username, password, role). Each role decides what that person can do.

ROLE	USUALLY ALLOWED
Administrator	Everything, including settings, staff, backups and approving credit over the limit.
Manager	Selling, voids, products, stock, purchases, customers and credit, expenses, cash-up and reports.
Cashier	Selling at the till and their own sales. Extra permissions (credit, discounts) can be given if needed.

- Press **New role** to create your own roles, or **Edit** to tick exactly which permissions a role has.
- Forgotten password? The administrator uses **Reset password**. A person who leaves is made inactive (untick **Account active**); their history stays.

Security

- The screen can **lock automatically** when nobody uses it (Settings → Credit & security). The till keeps the current sale.
- The **Audit Log** keeps a permanent record of important actions: sign-ins, price changes, voids, returns, stock adjustments, credit approvals and settings changes. Entries cannot be edited or deleted.

Settings (administrator)

SECTION	WHAT YOU CAN SET
Business profile	Name, logo, owner, phone, location, KRA PIN, and the **Retail & wholesale counters** switch.
Receipts	Header note, footer message, receipt number prefix, printer, print straight away, print after every sale.
Stock rules	What happens when stock is not enough for a sale: block the sale, or allow it.
Payment methods	Which ways customers can pay: cash, M-PESA, bank and card. Switch one on when you start taking it; it then appears at the till and in the cash-up.
Credit & security	Allow credit sales, and the automatic screen lock.
Date & time	How dates and times are shown and printed.

> **How it helps:** each person can only do what their job needs, and every important action carries a name, which discourages mistakes and theft.

11 Backups & the tablet app

Backups: protecting your records

Your records are kept on your own device. A backup is a copy you can bring back if the computer breaks, is stolen or is replaced.

- **Automatic backups** run **every 6 hours** while the system is open, into the folder chosen in **Backup & Restore** (a flash drive or another disk is best). The latest 28 (about a week) are kept.
- **Back up now** makes a copy at any time, for example before a big change. Copy it to a flash drive and keep it away from the shop.
- **Restore**: press **Choose backup file…** and pick the backup. The system checks the file and shows which shop and date it is from before you confirm. Only do this with your administrator or our support.

> **Rule of thumb:** keep one recent backup **outside** the shop (a flash drive at home, or Google Drive on the tablet). A backup in the same building is lost with the computer in a fire or theft.

Using a tablet or phone

The Android app has the same pages as the computer: it can be the main till or an extra one. Each device is activated with its own code.

- **Scanning:** tap **Scan** on the till to use the camera as a barcode scanner.
- **Receipts:** share the receipt by WhatsApp or SMS, or print it through a Bluetooth receipt-printer app. Purchase orders and statements are shared the same way.
- **Backups:** on the tablet, sign in with Google and switch on **Back up to Google Drive every 6 hours**, or press **Save or share backup**.
- **Phones:** the menu is at the bottom (**More** shows every page); lists become cards and windows open from the bottom of the screen.

> **How it helps:** a tablet costs less than a computer and works through power cuts on its battery; a phone lets the owner check sales and stock away from the shop.

12 Quick answers & support

PROBLEM	WHAT TO DO
I can't see a page or a button	Your role doesn't allow it. Ask the administrator to give your role that permission under Staff & Roles.
Charge button is grey	The sale is empty, or (wholesale counter) an item is below its wholesale minimum. Add more or sell at the retail counter.
"The price has changed"	A price was updated while the item was in the sale. Remove the item and add it again.
Credit is refused	Credit sales may be switched off, the customer may have no credit limit, or the sale goes over the limit and needs an administrator's approval.
Not enough stock	Receive the stock first, or do a stock count if the shelf has more than the system shows.
Receipt does not print	Check the printer is on, has paper and is chosen in Settings → Receipts. You can always reprint from Sales History.
Wrong sale entered	Open it in Sales History and use Void sale with a reason (manager or administrator).
Forgot my password	The administrator resets it in Staff & Roles → Reset password.
Power went off during a sale	Every completed sale is saved immediately. Open the system again; only an unfinished sale needs to be entered again.
Phone number refused	Phone numbers need at least 10 digits, e.g. 0712 345 678, or leave the box empty.
New or replaced computer	Call us. We install the system, restore your latest backup and give you a new activation code.

Good habits

Every day

- Sell everything through the till
- Record deliveries and expenses the same day
- Do the cash-up before closing

Every week

- Count fast-moving stock
- Follow up customers who owe money
- Copy a backup to a flash drive or Drive

Need help?

Call or WhatsApp us with the name of the page and what you were doing. A photo of the screen helps us fix it faster.

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