



PixelPlus POS Full

Modules guide: every industry module, screen by screen

Version 2.0.0 · 2 October 2026

For business owners, managers and staff · PixelPlus IT

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1. How the modules work

PixelPlus POS Full is one system with a module for each kind of business. The till, stock, buying, customers, cash-ups and reports are always there. Everything else is a module you switch on when you need it.

Switching modules on

1. Sign in as an admin.
2. Open **Core platform → Industries & modules**.
3. Tick the modules your business uses and press **Save**. Their screens appear in the menu straight away, with their own reports, permissions and dashboard tiles.

Tip

Switch on only what you use. A module that is switched off keeps its records; switching it on again brings them back.

Who sees what

Each module adds its own permissions. Under **Core platform → Roles & permissions** make a role with exactly the permissions a person needs, then give that role to the person under **Users**. A **Department** limits which modules its members see.

Help on every screen

Every screen has a **? Help** button (or press **F1**). It explains what the screen is for, the steps, every field and the common mistakes, and you can type a question about the screen.

The books stay balanced

When the Accounting module is on, every sale, refund, purchase, payment, stock adjustment, production run, deposit and payroll run posts to the ledger by itself. Check **Accounting → Trial balance** at any time: it always balances.

2. Everyday POS screens

Dashboard

Today at a glance for the branch you are in, plus live figures from every module that is switched on.

Why: See straight away how trading is going and what needs attention, without running reports.

When: At opening, during the day and at closing. It refreshes every minute while it is open.

Step by step

1. Pick the branch at the top of the screen to change what you see.
2. Click any tile with a figure to open the screen behind it.
3. Tick off your own tasks in "My tasks".

Common mistakes

- Looking at another branch's figures — check the branch in the header.
- Reading "Sales this month" as including VAT — it is before VAT, like the accounts.

New sale

The till: ring up items, choose the customer, take payment and print the slip.

Why: Every sale moves stock, updates the customer's account and loyalty, and is posted to the books automatically.

When: Whenever you sell over the counter.

Step by step

1. Open your till first (Till & cash-up) — sales can't be made with the till closed.
2. Scan a barcode or tap a product. Weighed items ask for the weight; serial-numbered items ask for the serial.
3. Pick the customer if they have an account, loyalty card or special prices.
4. Tap the payment: Cash (type what they gave you to see the change), Card, EFT, Account, Split, Voucher, Points or Refill card.
5. The slip prints; vouchers, tickets and refill cards print from the buttons on the receipt screen.

Field	What to fill in
Hold / Held	Park a sale while you serve someone else, then bring it back.
Note	A note printed on the slip.
Lay-by	Puts the items aside for the chosen customer with a deposit.
Gift voucher	Sell a gift voucher of any value.
Bottle return	Pay back the deposit on returned bottles (water shops).

Common mistakes

- Selling to "Walk-in" when the customer has an account price — choose them first.
- Typing a different price without permission — only managers can change prices.
- Forgetting to scan the empty bottle swap — the till asks each time a bottle with a deposit is sold.

Sales history & refunds

Every sale, with reprint and refund.

Why: Find a sale for a customer, reprint a slip or give a refund that puts stock back and corrects the books.

When: For returns, queries and reprints.

Step by step

1. Search by slip number, customer or date.
2. Click  to reprint, or Refund to return items.
3. On a refund choose which items came back, whether they go back on the shelf or to damaged stock, and how the money goes back (the original way, cash, card or store credit).

Common mistakes

- Restocking damaged goods — untick "back on the shelf" so they go to damaged stock.
- Refunding cash for a card sale without a manager's say-so.

Quotes

Quotes for customers or prospects.

Why: Give a price in writing; turn it into a sale or invoice with one click when they accept.

When: Before a customer commits.

Step by step

1. New quote, choose customer (or type a prospect), add items and discounts.
2. Print or email it.
3. When accepted: →Sale to ring it up, or →Inv to invoice it.

Common mistakes

- Letting quotes expire — check the bell for quotes expiring.

Invoices

Invoices on a customer's account, credit notes and payments against them.

Why: Bill account customers; the debtors ledger and statements follow automatically.

When: For account customers and work billed later (job cards, rentals and dispatched orders make invoices for you).

Step by step

1. New invoice: customer, items (or free-text service lines), due date.
2. Email or print it.

3. Record payments under Customers → Record payment; credit notes take items back.

Common mistakes

- Deleting instead of crediting — always use a credit note so the books stay right.

Products & stock

Your products and services: prices, costs, barcodes, stock per branch, and all the extra details for each industry.

Why: Correct products are the base for correct sales, stock values and profit.

When: When you add new items, change prices or adjust stock.

Step by step

1. Add product: name, SKU, barcode (or let the system make one), price and cost.
2. Open "More details" for the product type (stock, service, rental, deposit, refill card...), weighing, serials, batches, medicine, clothing and water details.
3. Adjust stock only with a reason (damaged, lost, correction...) — every change is logged and posted.

Common mistakes

- Entering cost including VAT when the setting says costs exclude VAT (Settings → costs include VAT).
- Using the same barcode on two products.
- Adjusting stock to fix a sale mistake instead of refunding the sale.

Stocktake

Count all stock in a branch and correct the system to the count.

Why: Finds shrinkage and keeps stock values right for the books.

When: At least once a year (financial year end), and when stock seems wrong. For small, frequent counts use Cycle counts.

Step by step

1. Start a stocktake for the branch.
2. Count and enter quantities (scan to count).
3. Review the differences, then post. Gains and losses go to the books.

Common mistakes

- Selling while counting without accounting for it — count when closed, or count section by section.

Specials

Promotions: special prices, % off, buy N for R X, buy N get M free, with dates, days and times.

Why: Run promotions without changing the normal price.

When: When planning promotions and markdowns.

Step by step

1. Add a special, pick the type and the products or category.
2. Set the dates (and days / times if it is a happy hour).
3. The till applies it automatically and shows it on the slip.

Common mistakes

- Overlapping specials on the same product — the best one for the customer wins.

Suppliers

Your suppliers and what you owe them.

Why: Purchase orders, goods received and supplier payments keep the creditors ledger right.

When: When adding a supplier or paying one.

Step by step

1. Add the supplier.
2. Receive goods on GRVs against purchase orders.
3. Record payments; print a statement to check against theirs.

Common mistakes

- Paying a supplier outside the system — the balance then looks too high.

Purchase orders

Purchase orders to suppliers.

Why: Order exactly what you need and check deliveries against it.

When: When ordering stock.

Step by step

1. New purchase order: supplier, branch, items and costs.
2. Email it to the supplier.
3. When it arrives, Receive it (GRV) — short deliveries stay open.

Common mistakes

- Receiving without a PO and then also receiving the PO — stock doubles.

Goods received

Goods received vouchers — stock coming in from suppliers.

Why: Adds stock at the real cost, updates average cost and what you owe the supplier.

When: Every delivery.

Step by step

1. New GRV (or Receive from a purchase order).
2. Check quantities and costs against the supplier's invoice.
3. Batch-tracked items need the batch number and expiry date.

Common mistakes

- Capturing costs including VAT when the setting says excluding (or the other way round).

Customers

Your customers: contact details, account balances, credit limits, price levels, loyalty, consent to marketing.

Why: Account sales, statements, loyalty and CRM all hang off the customer record.

When: When a regular customer is added or their details change.

Step by step

1. Add a customer with at least a name and phone or email.
2. Set a credit limit for account customers.
3. Tick what they agreed to receive (email / SMS / WhatsApp) — POPIA.
4. Use  to open their full profile (CRM) and  for a statement.

Common mistakes

- Duplicates of the same customer — search first.
- Sending marketing to people who did not agree.

Till & cash-up

Open your till with a float, and cash up at the end of the shift.

Why: Proves the cash in the drawer matches what the system says should be there. Over and short amounts are posted to the books.

When: At the start and end of every shift.

Step by step

1. Open: count the float and type it in.
2. During the day: record money paid in or out of the drawer (e.g. petty cash).
3. Close: count the cash and enter card / EFT totals from the machines; the variance is shown.
4. A manager approves the cash-up if that is switched on.

Common mistakes

- Leaving a till open overnight — the next person can't open theirs.
- Not recording petty cash paid out — the till shows short.

Reports

Every report: sales, stock, customers, suppliers, staff, operations, financial and people.

Why: Answers "how are we doing" for any period, branch, customer or supplier. Each report prints, exports to Excel / PDF or emails.

When: Daily, monthly and at year end.

Step by step

1. Pick the period and branch at the top for the summary.
2. Open any report from the list; change dates and filters in the report window.
3. Use Print A4, Print slip, Excel, PDF or Email.

Common mistakes

- Comparing a branch report with an all-branch report.

Users

People who sign in, their role and branch access.

Why: Each person sees and does only what their role allows; every action is logged under their name.

When: When staff join, leave or change jobs.

Step by step

1. Add a user with a username and password (they change it on first sign-in).
2. Choose a role: Admin, Manager, Cashier or one of your own roles.
3. Optionally put them in a department (limits which modules they see) and user groups (extra permissions).
4. Deactivate people who leave — never share logins.

Common mistakes

- Giving everyone Admin.
- Sharing one login at a till — you lose the audit trail.

Branches

Your shops, warehouses and their tills (workstations).

Why: Stock, prices and sales are kept per branch.

When: When opening a branch or adding a till.

Step by step

1. Add the branch and its workstations.
2. Mark warehouses under Warehouse → Warehouses & branches.

Common mistakes

- Selling from the wrong branch — the till uses the branch it is opened in.

Business settings

Business details, VAT, payment methods, documents, email, printers and security.

Why: These settings drive every slip, invoice, VAT figure and email.

When: At setup, and when something about the business changes.

Step by step

1. Fill in your registered name, VAT number and address.
2. Set whether prices and costs include VAT.
3. Set up email so invoices and statements can be sent.

Common mistakes

- Changing "prices include VAT" after trading has started — talk to your accountant first.

Support

Ask PixelPlus IT for help.

Why: Questions and problems are tracked until they are answered.

When: When the help assistant can't answer.

Step by step

1. New ticket, describe what happened and what you expected.

What's new New

What changed in each version.

Why: Know about new features and fixes.

When: After an update.

Step by step

1. Open What's new from the menu; the newest version is at the top.
2. Read the changes before training staff on new features.

3. Core platform

Tasks

Tasks given to people or groups, with due dates and priorities.

Why: Nothing falls through the cracks; overdue tasks show in the bell and on the dashboard.

When: For follow-ups, maintenance, ordering, anything that needs doing.

Step by step

1. New task: what, who, by when.
2. The person marks it Started and Done.

Common mistakes

- Assigning to a group nobody watches.

Activity tracking

Who did what, when — sign-ins, screens opened and changes.

Why: Accountability and finding out what happened.

When: When investigating a problem or checking staff use.

Step by step

1. Filter by person, date or action.

My companies

Switch between your businesses without signing out.

Why: Owners with more than one company (separate VAT numbers) can move between them.

When: If you run several businesses on PixelPlus.

Step by step

1. Link the other company with its admin login once.
2. Switch from here.

Roles & permissions

Your own roles with exactly the permissions you choose.

Why: The three built-in roles may not fit; e.g. "Supervisor" who may refund but not change prices.

When: At setup or when jobs change.

Step by step

1. New role: tick the permissions.
2. Give users the role on the Users screen.

Common mistakes

- Forgetting "Ring up sales" on a till role.

User groups

Groups that add extra permissions to their members and receive group tasks.

Why: Give a few people an extra right (e.g. stock adjustments) without a new role.

When: For teams such as "Buyers" or "Night shift".

Step by step

1. New group, tick extra permissions, add members.

Departments

Departments limit which modules a person sees.

Why: The workshop team sees the workshop, the butchery team the butchery.

When: In larger businesses.

Step by step

1. New department, pick its modules.
2. Set the department on the user.

Common mistakes

- Putting an admin in a department and then wondering where screens went.

Industries & modules

Switch on the industries and modules your business uses.

Why: Menus, till buttons and reports only show what you need.

When: At setup, or when you start a new line of business.

Step by step

1. Tick the modules and save. Data is kept if you switch one off.

Common mistakes

- Switching on everything — staff get confused by screens you don't use.

Company branding

Your colours, tagline and document footer.

Why: Slips, invoices and the app look like your business.

When: At setup.

Step by step

1. Pick the colours and save; upload the logo under Settings.

Works together with

Dashboard, Business settings, Users

4. Inventory management

Stock control (buckets)

Stock that is not on the shelf: reserved (orders, lay-byes), damaged and expired, per branch.

Why: Only sellable stock is offered at the till; losses are written off properly.

When: Weekly, and whenever damaged or expired stock is found.

Step by step

1. Move stock to damaged or expired, or back to sellable.
2. Write off, or return to the supplier for credit.

Common mistakes

- Leaving damaged stock as sellable.

Batches & expiry dates

Batches / lots with expiry dates.

Why: Sell oldest first (FEFO), block expired stock, trace any batch to the customers who bought it.

When: For food, medicine, chemicals — anything with an expiry.

Step by step

1. Batch-tracked products need a batch and expiry on every GRV.
2. Quarantine or expire batches when needed.

Common mistakes

- Receiving batch stock without a batch number.

Price levels

Price lists such as Trade, Wholesale or Staff — a % off, a % on cost, or set prices per product.

Why: Customers on a level get their price automatically at the till and on documents.

When: For trade and wholesale customers.

Step by step

1. New level and its rule.
2. Set the level on the customer.

Common mistakes

- A level that sells below cost — check the margin.

Customer pricing

A customer's own price for particular products.

Why: Agreed prices apply automatically.

When: When you agree a price with a customer.

Step by step

1. Add the customer and their products and prices.

Contract pricing

Contract pricing with start and end dates.

Why: Tender or supply contracts at fixed prices for a period.

When: When you sign a supply contract.

Step by step

1. Add the contract, dates and products.

Common mistakes

- Forgetting the end date.

Bulk pricing

Lower prices when buying more (quantity breaks).

Why: Encourage bigger orders.

When: For case or bulk pricing.

Step by step

1. Add the product, the minimum quantity and the price.

Price check

Look up any product's price, stock and the customer's price.

Why: Answer "how much is this?" without starting a sale.

When: On the shop floor.

Step by step

1. Scan or search.

Consignment stock in

Stock you hold for a supplier that you only pay for once sold.

Why: Keeps consignment stock out of your own stock value and creditors until sold.

When: When receiving consignment stock.

Step by step

1. Receive the consignment.
2. Settle with the supplier for what sold.

Consignment settlements

Paying the supplier for consignment stock that sold.

Why: You owe only for what sold.

When: Monthly, or as agreed.

Step by step

1. New settlement, calculate, post.

Barcodes, labels & QR codes

Print barcodes, shelf labels and QR codes.

Why: Fast scanning and correct shelf prices.

When: After new stock or price changes.

Step by step

1. Pick products, label size and quantity, print.

Common mistakes

- Printing shelf labels before the price change is saved.

Serial & IMEI numbers

Every serial / IMEI number in stock and sold, with warranty dates.

Why: Trace a unit to its sale and check warranty.

When: For phones, appliances, tools.

Step by step

1. Serials are captured when selling serial-tracked products.

Works together with

Expiring stock, Recalls, Products & stock, Batch traceability, Warranty & serial lookup, Weight labels

5. Retail

Loyalty programme

Loyalty points: how customers earn and spend them.

Why: Brings customers back.

When: At setup; check the ledger for queries.

Step by step

1. Set the rand per point and point value.
2. Customers earn on every sale and pay with points at the till.

Common mistakes

- Making points too valuable — work out the cost first.

Gift vouchers & credit

Gift vouchers and store credit.

Why: Sold vouchers are money owed to customers until used; the books show this correctly.

When: Selling, redeeming or checking a voucher.

Step by step

1. Sell from the till (Gift voucher).
2. Redeem with the Voucher payment button.

Common mistakes

- Expiring vouchers too soon — at least 3 years (Consumer Protection Act).

Lay-byes

Goods put aside while the customer pays them off.

Why: The stock is reserved and payments are held until collection.

When: When a customer can't pay in full now.

Step by step

1. From the till: Lay-by with a deposit.
2. Take payments; Collect when paid.
3. Cancel with the fee if they give up.

Common mistakes

- Handing over goods before the lay-by is collected in the system.

Quick keys

Big buttons on the till for items without barcodes.

Why: Faster selling of bread, coffee, refills...

When: At setup.

Step by step

1. Add keys with label, product and colour.

Returns & exchanges

Returns and exchanges in one step.

Why: Refund the returned item and sell the new one together.

When: When a customer swaps a size or item.

Step by step

1. Find the sale, pick what comes back, add what they take.

Works together with

Customers, New sale, Sales history & refunds

6. Warehouse

Order fulfilment (pick, pack, dispatch)

All confirmed sales orders flowing through pick, pack and dispatch.

Why: Nothing ships late or wrong; each step updates stock and invoicing.

When: All day in the warehouse.

Step by step

1. Print the pick list (shows bins).
2. Record picking (scan or type).
3. Pack (parcel labels print).
4. Dispatch: stock leaves and the customer is invoiced; a delivery is booked if we deliver.

Common mistakes

- Dispatching before picking is recorded.

Sales orders

Customer orders for delivery or collection later.

Why: Confirming reserves the stock so the till can't sell it twice.

When: For phone, email, B2B and trade orders.

Step by step

1. New order: customer, items (their price fills in), needed-by date.
2. Confirm & reserve.
3. Fulfil on the Order fulfilment screen.

Common mistakes

- Leaving orders unconfirmed — the stock isn't held.
- Forgetting the backorder for short items.

Receiving

Purchase orders waiting to arrive.

Why: Receive deliveries quickly against the order.

When: When a delivery arrives.

Step by step

1. Click Receive, check what came, save.
2. Put the stock away into bins.

Warehouses & branches

Which branches are warehouses and which are shops.

Why: Warehouses hold and ship stock but don't sell over the counter.

When: At setup.

Step by step

1. Mark the branch as a warehouse.

Bin locations

Shelf and rack locations inside a branch.

Why: Pick lists tell staff exactly where to find each item.

When: When setting up the warehouse and putting stock away.

Step by step

1. Add bins (e.g. A-01-03).
2. Put stock into bins; picking and sales take it out.

Common mistakes

- Stock in the branch but not in any bin — put it away.

Cycle counts

Small, frequent counts of part of the stock.

Why: Keeps stock accurate without closing for a full stocktake.

When: Weekly per area.

Step by step

1. New count: by category, bin, products or low stock.
2. Start, count, post.

Works together with

Dispatch board, Goods received, Quotes, Stocktake

7. Butchery

Carcasses

Carcasses bought, with tag, grade, weight and cost.

Why: Each one is booked into stock and onto the supplier's account, and every cut can be traced back to it.

When: Every delivery from the abattoir.

Step by step

1. New carcass: template, supplier, tag, grade, weight and price per kg.
2. Attach photos and the abattoir slip.
3. Receive into stock, then Break it down.

Common mistakes

- Using the hot weight when you are invoiced on cold weight.

Breakdowns (cutting)

Cutting a carcass into cuts, weighing everything.

Why: Gives each cut its true cost per kg (by value) and shows yield, waste and loss.

When: Each time you cut.

Step by step

1. Start from the carcass (cuts fill in from the template).
2. Weigh every cut and the bone, fat and trim.
3. Add labour / packaging if you want it in the cost.
4. Post: the carcass leaves stock and the cuts come in at their cost.

Common mistakes

- Not weighing waste — it then shows as moisture loss.
- Leaving the value per kg blank for a cut with no selling price.

Yield & waste report

Yield, waste and loss per carcass and per cut, against the template.

Why: Shows which suppliers, grades and butchers give the best yield.

When: Weekly and monthly.

Step by step

1. Pick dates and animal; export or print.

Breakdown templates

The usual cuts from a carcass and their expected %.

Why: Speeds up breakdowns and gives the yield target.

When: At setup, and when you change your cutting plan.

Step by step

1. Pick the carcass stock item, add cuts and expected %.

Common mistakes

- Percentages adding up to more than 100%.

Weight labels

Print pack labels with weight, price and a price barcode.

Why: The till rings up the exact pack price by scanning the label.

When: When pre-packing meat, cheese, produce.

Step by step

1. Pick the product, weigh, print.
2. Products need a PLU and "sold by weight".

Common mistakes

- Barcode settings off — switch them on in Scales & scale barcodes.

Scales & scale barcodes

Connect a scale to this computer and set up price / weight barcodes.

Why: Weighed items are accurate and fast.

When: At setup of each till with a scale.

Step by step

1. Set the scale's speed and how it sends weight, then test.
2. Set the barcode layout to match your label scale.

Field	What to fill in
Barcode starts with	Usually 20–29 (in-store numbers).
PLU digits	How many digits the product number has on the label.
Price or weight	What the number on the label means.

Common mistakes

- Using a browser other than Chrome / Edge for scales.

8. Pharmacy

Dispense

Dispense a prescription.

Why: Checks the script, repeats and allergies, prints labels and records the register.

When: For every script.

Step by step

1. Pick the patient and script.
2. Send to the till; batches are chosen oldest first.

Common mistakes

- Dispensing a schedule 5+ item without a script.

Prescriptions

Prescriptions with doctor, repeats and validity.

Why: Controls repeats and scheduled medicines.

When: When a script comes in.

Step by step

1. Capture the script and items.
2. Dispense each fill.

Common mistakes

- Wrong number of repeats.

Dispensing register

Every dispensing.

Why: Legal register and patient history.

When: Audits and queries.

Step by step

1. Filter by date, patient or medicine.
2. Open a dispensing to see the script, batches and who dispensed it.
3. Print the list for an inspection.

Medicines

Medicine details: schedule, NAPPI, strength, ingredients, warnings.

Why: Correct labels and legal controls.

When: When adding medicines.

Step by step

1. Search the medicine.
2. Fill in the schedule, NAPPI code, strength, form, active ingredients, dosage and warnings.
3. Tick "Needs a prescription" for S2+ items that need a script at the till.

Batches & expiry dates

Medicine batches and expiry dates.

Why: FEFO and recalls.

When: Receiving and checking stock.

Step by step

1. Batches are made when stock is received on a GRV with a batch number and expiry.
2. Open a batch to quarantine, release or expire it.
3. Use Traceability to see who bought it.

Expiring stock

Stock expiring soon.

Why: Sell or return it before it expires.

When: Weekly.

Step by step

1. Choose how far ahead to look (e.g. 90 days).
2. Sell the soonest-expiring stock first, or return it to the supplier.
3. Expire batches that are past their date so they can't be sold.

Recalls

Product recalls by batch.

Why: Find and contact every customer who bought the batch.

When: When a supplier or SAHPRA issues a recall.

Step by step

1. Start the recall: stock is quarantined.
2. Notify affected customers.
3. Close when done.

Batch traceability

Where a batch came from and who bought it.

Why: Full traceability for recalls and complaints.

When: On demand.

Step by step

1. Enter the batch number.

Scheduled medicine register

Register of scheduled medicines dispensed.

Why: Legal requirement for S5 and above.

When: Monthly and for inspections.

Step by step

1. Pick the period and the lowest schedule to include (e.g. S5).
2. Check each entry has a script and doctor.
3. Print or export for the inspector.

Works together with

Batches & expiry dates, Products & stock

9. Workshop & repairs

Workshop board

Every open job by stage, with technicians' workload.

Why: See what is waiting, late or ready at a glance.

When: All day in the workshop.

Step by step

1. Book in new jobs from here.
2. Click a job to move it on.

Job cards

A repair or service from booking in to collection.

Why: Records the problem, parts, labour, the customer's OK, deposit, invoice and repair warranty.

When: Every job.

Step by step

1. Book in: customer, item, problem, what was left with it.
2. Diagnose, add parts and labour, and ask the customer to approve (link by email / SMS).
3. Start work, take parts from stock, Job done (customer told).
4. Invoice (deposit taken off) and mark Collected.

Common mistakes

- Starting work before the customer approved a big quote.
- Collected without invoicing.

Devices

Customer devices with IMEI / serial.

Why: Repair history and warranty per item.

When: When booking in.

Step by step

1. Add the device when booking in a job (or from the job card).
2. Type the IMEI (dial *#06#) or serial number.
3. Open the device later to see its repair history and warranty.

Common mistakes

- IMEI typos — the system checks the IMEI is valid.

Warranty & serial lookup

Check warranty by IMEI, serial, registration, VIN, job or phone number.

Why: Answer warranty questions instantly.

When: When a customer brings something back.

Step by step

1. Type or scan and press Look up.

Workshop settings

Labour rate, warranty periods, service intervals and job card terms.

Why: Used on every job card.

When: At setup.

Step by step

1. Set your normal labour rate per hour.
2. Set the repair warranty days (3 months minimum by law) and the service interval.
3. Edit the job card terms and save.

Works together with

Serial & IMEI numbers, Vehicle job cards

10. Vehicle repair

Vehicle job cards

Job cards for vehicles: odometer, fuel, service plans and history.

Why: Full service history per vehicle.

When: Every vehicle job.

Step by step

1. As for job cards; pick the vehicle and odometer.
2. Service jobs set the next service date and km.

Vehicles

Customer vehicles: registration, VIN, engine number and service details.

Why: History, reminders and warranty.

When: First time a vehicle comes in.

Step by step

1. Add the registration and owner.
2. Add the VIN (17 characters) and engine number from the licence disc.
3. Set the next service km / date, or let the service job set it.

Common mistakes

- VIN typos — 17 characters, never I, O or Q.

Service due

Vehicles due for a service or licence renewal.

Why: Bring customers back.

When: Weekly.

Step by step

1. Send a reminder or book them in.

Service plans

Prepaid service / maintenance plans.

Why: Plan jobs aren't billed to the customer; services are counted down.

When: When a vehicle has a plan.

Step by step

1. Add the plan for the vehicle with its end date, km limit and number of services.
2. On a job card choose "Who pays: Service plan" and the plan.
3. Each completed plan job uses up one service.

Common mistakes

- Plan past its km or date.

11. Manufacturing

Production schedule

Timeline of work orders per work centre.

Why: See load and clashes; move steps around.

When: Daily planning.

Step by step

1. Click a bar to start, finish or move it.

Production orders

Orders to make a quantity of a product.

Why: Materials are reserved and used, work is scheduled and finished goods come in at true cost.

When: Whenever you produce.

Step by step

1. New order: product, quantity, start.
2. Release (materials reserved, work orders scheduled).
3. Issue materials, do the work orders, Complete with good and scrap quantities.

Common mistakes

- Completing without entering scrap — the cost per unit is then too low.

Work orders

One production step at a work centre.

Why: Actual hours go into product cost.

When: On the factory floor.

Step by step

1. Start when you begin; Finish with hours worked.

Bills of materials

Recipes: materials (with waste %) and operations.

Why: Costing, material requirements and scheduling all come from the recipe.

When: When you make a new product or change one.

Step by step

1. Add materials and steps.
2. Make it the active version.
3. Copy to a new version for changes.

Common mistakes

- A recipe that uses itself.
- Leaving waste % at 0 when there is waste.

Material planning

What open production orders still need versus stock and orders.

Why: Order raw materials in time.

When: Before releasing orders and weekly.

Step by step

1. Create purchase orders for the shortfall.

Work centres

Production areas with cost per hour and hours per day.

Why: Costing and scheduling.

When: At setup.

Step by step

1. Add each production area.
2. Enter the cost per hour of the people and overheads there.
3. Enter the hours it works per day for scheduling.

Machines

Machines with running cost and maintenance dates.

Why: Costing, scheduling and service reminders.

When: At setup.

Step by step

1. Add the machine and its work centre.
2. Enter its running cost per hour.
3. Set the next service date; set it to Broken down or In maintenance so it isn't scheduled.

Works together with

Purchase orders

12. Clothing

Styles

Garment styles and their size / colour variants.

Why: Each size and colour is its own stock item with its own barcode, reported per style.

When: When a new range arrives.

Step by step

1. New style with price and cost.
2. Make sizes & colours.
3. Receive stock on a GRV; print labels.

Common mistakes

- Creating variants by hand as separate products.

Size / colour matrix

Stock and sales per size and colour.

Why: See which sizes sell out so you reorder the right ones.

When: Weekly buying review.

Step by step

1. Pick the style and branch.
2. Read stock on hand per size and colour; sales for the period are in brackets.
3. Reorder the bold (selling) sizes; red cells are sold out.

Fashion report

Sales, margin, sell-through and weeks of cover by style, colour, size, season or brand.

Why: Decide what to reorder, mark down or move.

When: Weekly and end of season.

Step by step

1. Choose to group by style, colour, size, season, brand or category.
2. Pick the dates and branch.
3. Sort by sell-through: reorder high ones, mark down low ones; export to Excel.

Stock rotation & ageing

Stock age and idle items, with suggested transfers and markdowns.

Why: Free up cash and space.

When: Monthly and before season end.

Step by step

1. Transfer idle stock to branches that sell it.

2. Mark down selected items as a special.

Sizes, colours & seasons

Sizes, colours, seasons and their order and SKU codes.

Why: Consistent variants and reports.

When: At setup.

Step by step

1. Add your sizes in order (XS, S, M, L... with order 1, 2, 3...).
2. Add colours with a short SKU code (BLK, NVY) and a swatch.
3. Add seasons (e.g. Winter 2026).

Common mistakes

- Different spellings of the same colour.

Works together with

Specials

13. Water shop

Bottles & deposits

Bottles out on deposit and value on refill cards.

Why: This is money you hold for customers.

When: Monthly check.

Step by step

1. Check bottles out and deposits held per customer.
2. Compare the total with the ledger figure (Accounting).
3. Export for your records.

Refill cards

Prepaid refill cards.

Why: Customers prepay refills; each refill uses one.

When: Selling and checking cards.

Step by step

1. Make a product of type "Prepaid refill card" with the number of refills and the refill product.
2. Sell it at the till; the card prints with a QR code.
3. Pay with Refill card at the till.

14. Deliveries & logistics

Dispatch board

The day's deliveries per driver.

Why: Plan routes and see progress live.

When: Every morning and during the day.

Step by step

1. Assign deliveries to drivers in stop order.
2. Print route sheets.

Driver screen

A driver's own deliveries on their phone.

Why: Navigate, call, and record proof of delivery and money collected.

When: On the road.

Step by step

1. Tap Delivered: name, signature, money collected.

Deliveries

Every delivery with status and proof.

Why: Know what was delivered, failed or collected.

When: All day.

Step by step

1. Add a delivery (or let dispatched sales orders and routes make them).
2. Assign a driver on the Dispatch board.
3. The driver marks it delivered with a signature, or failed with the reason.

Delivery routes

Regular delivery runs with stops.

Why: Make a week of deliveries with one click.

When: For standing orders (water, bakery, wholesale).

Step by step

1. Add the route, the days it runs and the driver.
2. Add the stops in order with their usual order.
3. Click "Make this week's deliveries".

Drivers

Drivers and their licence / PrDP expiry.

Why: Legal compliance and the driver screen.

When: At setup.

Step by step

1. Add the driver, cell and licence details.
2. Link their user login so they can use the Driver screen.
3. Keep licence and PrDP expiry dates up to date — you are warned 30 days before.

15. Rentals

Booking calendar

Bookings per rental item on a timeline.

Why: See availability and overdue returns.

When: Daily.

Step by step

1. Choose the start date, period and type of item.
2. Click a booking to open it.
3. Red outlines are overdue returns — phone the customer.

Rental bookings

Hire bookings from quote to return.

Why: Contract, deposit, check-out / in, damages and invoice in one place.

When: Every hire.

Step by step

1. Book (availability is checked).
2. Sign the contract and take the deposit.
3. Check out, then check in (late, km and damage charges).
4. Invoice (deposit taken off), pay back what is left of the deposit, close.

Common mistakes

- Checking out without a signed contract or deposit.

What's available?

What is free for a period and what it would cost.

Why: Quote quickly on the phone.

When: When a customer asks.

Step by step

1. Pick from and until.
2. Tick the free items the customer wants.
3. Click "Book these" to make the booking.

Rental items

Everything you hire out with rates and deposits.

Why: Pricing and availability.

When: At setup.

Step by step

1. Add the item with its type and asset number / registration.
2. Enter the rates you charge (hour, day, weekend, week, month) and the deposit.
3. Vehicles: free km per day and the rate per extra km.

Rental settings

Late-return grace time and hire terms.

Why: Printed on every agreement.

When: At setup.

Step by step

1. Set the grace time before late fees start.
2. Edit the hire terms printed on the agreement.
3. Save.

16. Ticketing

Events

Events with ticket types and seating.

Why: Sell tickets at the till with QR codes and control entry.

When: For every event.

Step by step

1. Add ticket types and quantities.
2. For seated events add seats.
3. Put on sale.

Common mistakes

- Ticket quantities more than the venue holds.

Gate scanning

Scan tickets at the gate.

Why: Each ticket gets in once; fakes and wrong events are stopped.

When: At the event.

Step by step

1. Pick the event and gate, then scan.

Event report

Sales, seats and attendance per event.

Why: Know how the event did.

When: Before and after events.

Step by step

1. Pick the event.
2. Read tickets sold per type, scans per gate and arrivals per hour.
3. Print or export.

Tickets sold

Every ticket sold.

Why: Reprint, cancel or re-issue.

When: Customer queries.

Step by step

1. Search by ticket number, seat or name.
2. Open a ticket to reprint it, cancel it or make a new QR code.
3. To give money back, refund the sale instead.

17. CRM & marketing

Customer profiles

Everything about one customer on one page.

Why: Serve customers better and spot who is drifting away.

When: Before a call or visit.

Step by step

1. Search the customer; use the tabs for purchases, account, deals and notes.

Sales pipeline

Deals by stage with a weighted forecast.

Why: Know what sales are coming.

When: Weekly sales meetings.

Step by step

1. Drag deals between stages.

Opportunities

Possible sales you are working on.

Why: Follow up and forecast.

When: When a lead comes in.

Step by step

1. Add the deal with customer, value and expected close date.
2. Move it through the stages (or drag it on the Sales pipeline).
3. Make a quote from it when you are ready.

Communication history

Every message sent to customers and calls logged.

Why: Anyone can see the full history.

When: Before contacting a customer.

Step by step

1. Messages sent by the system appear here automatically.
2. Log calls, visits and notes with "New".
3. Filter by customer or channel.

Campaigns

Email, SMS and WhatsApp campaigns to groups of customers.

Why: Promote specials to the right people, with their permission.

When: For promotions.

Step by step

1. Choose recipients, send a test, send.

Common mistakes

- Sending without a test.

Marketing settings

SMS and WhatsApp provider details.

Why: Needed to send SMS / WhatsApp.

When: At setup.

Step by step

1. Pick your SMS provider and paste its login details.
2. For WhatsApp, paste the Meta phone number ID, token and approved template name.
3. Send a test to your own number.

Works together with

Customers

18. Accounting

Accounting overview

Your books at a glance.

Why: Everything you sell, buy and pay is posted automatically as balanced double entries.

When: Monthly with your accountant.

Step by step

1. Check the summary figures and the 12-month income and expenses chart.
2. Use the links to drill into statements.
3. Ask your accountant to review monthly.

Chart of accounts

Chart of accounts.

Why: Where every amount is posted.

When: At setup; add expense accounts as needed.

Step by step

1. Add any extra expense or income accounts you need.
2. System accounts (bank, VAT, debtors...) are used automatically and can't be removed.
3. Give accounts the codes your accountant uses.

Common mistakes

- Deleting system accounts — they can't be removed.

Journals

Manual journals.

Why: Corrections, depreciation, opening balances.

When: Month end.

Step by step

1. Debits must equal credits; Post.

Cash book

Money in and out of the bank not from sales (rent, fees, drawings).

Why: Every bank movement belongs in the books.

When: When you pay expenses.

Step by step

1. Add money paid out (rent, electricity) or received (interest) with the account it belongs to.
2. Pick the bank or cash account.
3. It is posted to the ledger straight away.

Bank reconciliation

Bank statements and reconciliation.

Why: Proves the books agree with the bank.

When: Monthly.

Step by step

1. Import the CSV, match lines, post the rest.

Debtors

What customers owe, by age, against the control account.

Why: Collections and checking.

When: Monthly.

Step by step

1. Pick the date.
2. Check the subledger total equals the control account.
3. Follow up the oldest balances.

Creditors

What you owe suppliers, by age.

Why: Plan payments.

When: Monthly.

Step by step

1. Pick the date.
2. Check the subledger equals the control account.
3. Plan supplier payments by age.

VAT

VAT201 figures for a period.

Why: Submit your VAT return to SARS.

When: Every VAT period.

Step by step

1. Pick the VAT period.
2. Copy the VAT201 field figures into SARS eFiling.
3. Lock the period in Accounting settings once submitted.

Common mistakes

- Locking the period before your accountant checked it.

Trial balance

Trial balance.

Why: Debits equal credits — the starting point for statements.

When: Month end.

Step by step

1. Pick the date.
2. Check that total debits equal total credits.
3. Click an account for its ledger.

Income statement

Income statement (profit and loss).

Why: Did you make a profit?

When: Monthly.

Step by step

1. Pick the period (and branch).
2. Read sales, cost of sales, gross profit, expenses and net profit.
3. Print or export for your accountant.

Balance sheet

Balance sheet.

Why: What you own and owe.

When: Monthly and year end.

Step by step

1. Pick the date.
2. Check assets = liabilities + equity.
3. Print or export.

Cash flow

Cash flow statement.

Why: Where cash came from and went.

When: Monthly.

Step by step

1. Pick the period.
2. See cash from operations, investing and financing.
3. Opening cash + movement = closing cash.

General ledger

General ledger per account.

Why: See every entry behind a figure.

When: When checking a balance.

Step by step

1. Pick an account and period.
2. Every entry shows its source document.
3. Export to Excel if needed.

Accounting settings

Ledger start date, lock date and financial year.

Why: Lock closed periods so nobody changes them.

When: At setup and after each VAT / year end.

Step by step

1. Set the date the ledger starts and your financial year start month.
2. Set the lock date after each VAT period or year end.
3. Choose the accounts for cash paid in / out at the till.

Works together with

Customers, Suppliers

19. HR & payroll

Time clock

Staff clock in and out with a PIN.

Why: Hours for payroll and attendance.

When: Start and end of every shift.

Step by step

1. Tap your name, type your PIN.

Common mistakes

- Clocking in for someone else.

Employees

Employee records: personal, pay, tax, bank and files.

Why: The base for payroll, leave and the time clock.

When: When someone joins or changes.

Step by step

1. Add the employee with ID number, start date, pay type and rate.
2. Add tax number, bank details and medical aid members.
3. Set a clock-in PIN for the time clock.

Common mistakes

- Missing tax number — needed for IRP5s.

Contracts

Employment contracts with e-signature.

Why: BCEA requires written particulars of employment.

When: When someone starts.

Step by step

1. Add the contract with position, hours, pay, leave and notice.
2. Print it or have the employee sign on screen.
3. It becomes "Signed — in force".

Qualifications

Qualifications, licences and their expiry.

Why: Compliance and reminders.

When: When added or renewed.

Step by step

1. Add the qualification or licence with its expiry date.
2. Attach a copy.
3. Renew before it expires.

Attendance

Clock-ins and hours to approve.

Why: Approved hours flow into payroll.

When: Before payroll.

Step by step

1. Check clock-ins for missing clock-outs.
2. Fix breaks and hours if needed.
3. Approve (or Approve all) before payroll.

Roster

Weekly shift roster.

Why: Plan staff; compare with hours worked.

When: Weekly.

Step by step

1. Click a cell to add a shift.
2. Copy a week to the next week.
3. Print and put it up.

Leave

Leave applications and approvals.

Why: Correct leave balances and payroll.

When: When staff ask for leave.

Step by step

1. Add the request (or the employee does).
2. Approve or decline it.
3. Approved leave shows on the roster and in payroll.

Leave balances

Leave earned, taken and available.

Why: Answer "how much leave do I have?".

When: On request.

Step by step

1. Pick the date.
2. Read each employee's available leave (pending in brackets).

3. Print for staff.

Payroll

Monthly / weekly payroll with SA PAYE, UIF and SDL.

Why: Accurate payslips and statutory amounts, posted to the books.

When: Every pay period.

Step by step

1. New run, calculate, check, finalise, mark paid, email payslips.

Common mistakes

- Finalising before approving attendance.

Payslips

Payslips per employee.

Why: Employees' record of pay.

When: After payroll.

Step by step

1. Open a payslip from the payroll run.
2. Adjust a once-off item if needed (before finalising).
3. Print or email.

EMP201 & tax certificates

EMP201 monthly figures and IRP5 tax certificates.

Why: SARS submissions.

When: Monthly and at tax year end.

Step by step

1. Pick the month for the EMP201 (PAYE, UIF, SDL to pay SARS).
2. Pick the tax year for IRP5 certificates.
3. Print or export.

Earnings & deductions

Earnings and deductions.

Why: Allowances, overtime, pension, medical aid and more.

When: At setup.

Step by step

1. Add earnings (allowances, bonus) and deductions (pension, loans).
2. Say whether each is taxable and counts for UIF.
3. Add them to employees with their amounts.

Leave types

Leave types and entitlements.

Why: BCEA leave rules.

When: At setup.

Step by step

1. Check the standard BCEA leave types.
2. Change entitlements if your policy gives more.
3. Add any extra leave types.

Leave adjustments

Manual leave corrections.

Why: Opening balances and corrections.

When: As needed.

Step by step

1. Add an adjustment with the days and the reason (e.g. opening balance).
2. It changes the balance straight away.

Payroll settings

Tax tables, UIF, SDL and payroll options.

Why: Correct deductions.

When: Each new tax year (1 March).

Step by step

1. Check the tax tables for the current tax year (they change on 1 March).
2. Set SDL if your payroll is over R500 000 a year.
3. Save.

Common mistakes

- Using last year's tax tables.