

Running a retail shop

Industry guides

Documentation version 1.0
Published 17 November 2026
https://www.hesabuerp.co.ke/documentation/

Industry guides

Running a retail shop

A setup and daily routine for a shop that sells over the counter, from items to till to month end.

Beginner · About 25 minutes · Version 1.0 · Updated 17 November 2026

Plan availability

Needs the **Kuza** or **Enterprise** plan, which include selling, point of sale, buying and stock.

Who this is for

Shops that sell to walk-in customers for cash, M-Pesa or card: hardware, groceries, pharmacies, boutiques, agrovets.

Modules you will use

Stock, Point of sale, Buying, Accounting. Selling is used only for customers on credit.

Set up, in this order

1. **Company and tax.** Your company, fiscal year, KRA PIN and VAT. See Creating and configuring your company and VAT.
2. **Warehouses.** One for each shop, and one for the back store if you have one. See Warehouses and business locations.
3. **Items.** Import your items with codes, barcodes, units, selling prices and reorder levels. See Creating items and Importing data.
4. **Opening stock.** Count and enter it. See Opening stock and stock counts.
5. **Suppliers.** See Creating and managing suppliers.
6. **Point of sale.** Payment methods, profile and cashiers. See Setting up the POS.
7. **Users.** One login per person. See Example access setups.

Your daily routine

When	Who	What
Opening	Cashier	Open the shift, count the float
All day	Cashier	Sell, take payments, handle returns
Closing	Cashier and manager	Close the shift, count, note differences
Evening	Manager	Review closing entries and low stock
Morning	Storekeeper	Receive deliveries and submit receipts

Weekly and monthly

- Reorder what is below its reorder level. See Stock valuation and reorder levels.
- Count a few fast-moving items every week.
- Reconcile M-Pesa, card and bank. See Bank accounts and bank reconciliation.
- File VAT and PAYE. See Kenya tax overview.

Tips for retailers

- Use **barcodes**. Scanning is faster and has fewer errors than typing. See Barcodes and scanners.
- Set **price lists** for retail and for wholesale customers, if you have both.
- Use **batches and expiry dates** for pharmacies and food. See Batches and serial numbers.
- Review slow-moving stock monthly. See Stock reports.

Common mistakes

- Selling without an open shift, so sales are not tied to a cashier.
- Entering prices with and without VAT inconsistently.
- Skipping stock counts, then losing track of shrinkage.

Next steps

Read the cashier guide and the storekeeper guide.

Related documentation

- Point of sale overview
- Creating items
- Stock valuation and reorder levels
- VAT: setting up, recording and returning