

Setting up the POS: profile, payments and cashiers

Point of sale

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Point of sale

Setting up the POS: profile, payments and cashiers

Create a POS profile with the warehouse, price list and payment methods, and assign it to cashiers.

Intermediate · About 30 minutes · Version 1.0 · Updated 17 November 2026

Plan availability

Included in the **Kuza** and **Enterprise** plans. It is not part of **Biashara**. Contact us if you want to upgrade.

Overview

A **POS Profile** holds the settings for a till: which company, warehouse and price list it uses, which payment methods it accepts and who may use it.

Prerequisites

- A company, a shop warehouse and items with prices.
- A **Walk-in Customer** for anonymous sales (create it under **Customer**, with a group such as *Individual*).
- The Accounts Manager role to set up payment accounts.

Steps

Create modes of payment

1. Search for **Mode of Payment** and click **Add**.
2. Create one for each method: *Cash*, *M-Pesa* and *Card*.
3. In the **Accounts** table, choose the **Company** and the **Default Account** for that method: - *Cash*: a cash account (cash in hand) - *M-Pesa*: a bank-type account for your M-Pesa till or paybill - *Card*: the bank account that receives card settlements
4. Save.

Create the POS profile

1. Search for **POS Profile** and click **Add POS Profile**.
2. Enter a name, such as *Main Shop Till*, and choose the **Company**.
3. Choose the **Warehouse** the till sells from.

4. Choose the **Price List** and the **Currency**.
5. Under **Payments**, add each mode of payment and tick **Default** on the one used most, usually cash.
6. Under **Applicable for Users**, add the cashiers who may use this profile.
7. Optionally limit the items by **Item Group** or **Customer Group**, and set a default **Customer**.
8. Save.

Create the cashier users

1. Create a user for each cashier. Give only the roles they need, such as *Sales User* and *Accounts User* for POS. See Creating users and assigning roles.
2. Do not give cashiers the ability to change prices or delete invoices. See Permissions and restricting access.

Practical example

Mwangaza Hardware creates a profile *Main Shop Till*. It sells from the *Shop - MH* warehouse on the *Retail* price list, and accepts Cash, M-Pesa and Card. Two cashiers, Wanjiru and Otieno, are listed as applicable users.

Important notes

- One profile can be used by several cashiers, but only one shift should be open per till at a time.
- Match the M-Pesa account to your real till or paybill so reconciliation is simple.
- Prices come from the price list. Update it when your prices change. See Creating items.

Common mistakes

- Forgetting to add the cashier under **Applicable for Users**, so they cannot open the POS.
- Selling from a warehouse that holds no stock, so items show zero available.
- Missing payment accounts, so payments cannot be posted.

Troubleshooting

If the cashier sees *No POS Profile found*, the user is not listed on any profile, or the profile is disabled.

Next steps

Read Opening and closing a shift.

Related documentation

- Point of sale overview
- Opening and closing a shift
- Creating users and assigning roles
- The chart of accounts