Guide for the shop or branch manager

Guides by job role

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

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Guide for the shop or branch manager

Run one location day to day: tills, refunds, discounts, stock, staff and the daily close.

Intermediate · About 20 minutes · Version 1.0 · Updated 17 November 2026

Your role

You are responsible for one shop or branch: sales, cash, stock and the people. You check what the cashiers and storekeepers do, and you make the decisions they cannot.

Open the day

- Check the staff present, and that each cashier opens their own shift. See Opening and closing a shift.
- Look at the **Stock Balance** for items that must be on the shelf today. See Stock reports.
- Receive deliveries with the storekeeper. See Guide for the storekeeper.

During the day

- **Discounts.** Only approve within your rules. Record who agreed.
- **Refunds and returns.** Check the goods and the original receipt, then have the cashier do a return in the system. See Returns and corrections at the till.
- **Price questions.** Prices come from the price list. Ask the owner or accountant to change it, not the till.
- Watch for stock-outs of fast-moving items, and raise a **Material Request** to your head office or buyer.

Close the day

1. Each cashier closes their shift and counts their cash. See Opening and closing a shift.
2. Review the **POS Closing Entry** for each cashier. Read the **difference** and the note. See Point of sale reports and the daily routine.
3. Bank the cash and keep the deposit slip. Pass the figures to the accountant.
4. Check the M-Pesa and card totals against the till phone and statements.

Every week

- Count a few items and compare. See Opening stock and stock counts.
- Review the *Item-wise Sales Register* for best and slow sellers.
- Check overtime and attendance. See Attendance.

Every month

- Compare sales, expenses and stock losses with the previous month and the budget. See Budgets.
- Meet each cashier about repeated differences.

Common mistakes

- Approving discounts and refunds by word of mouth, with no record.
- Closing the day without looking at the differences.
- Keeping large cash in the shop overnight.

Who to ask

The owner for pricing and policy, the accountant for banking and reconciliation.

Related documentation

- Point of sale reports and the daily routine
- Returns and corrections at the till
- Stock reports
- Guide for the cashier