BlueDuka user guide

Point of sale, stock, M-Pesa, customer debts, staff, accounting, procurement, production, quality and the full ERP: how to use every part, step by step.

blueduka.co.ke · Call or WhatsApp +254 727 177 155 (Monday to Saturday, 8am to 8pm)

Edition of 06 November 2026. The latest guide is always at blueduka.co.ke/guide/

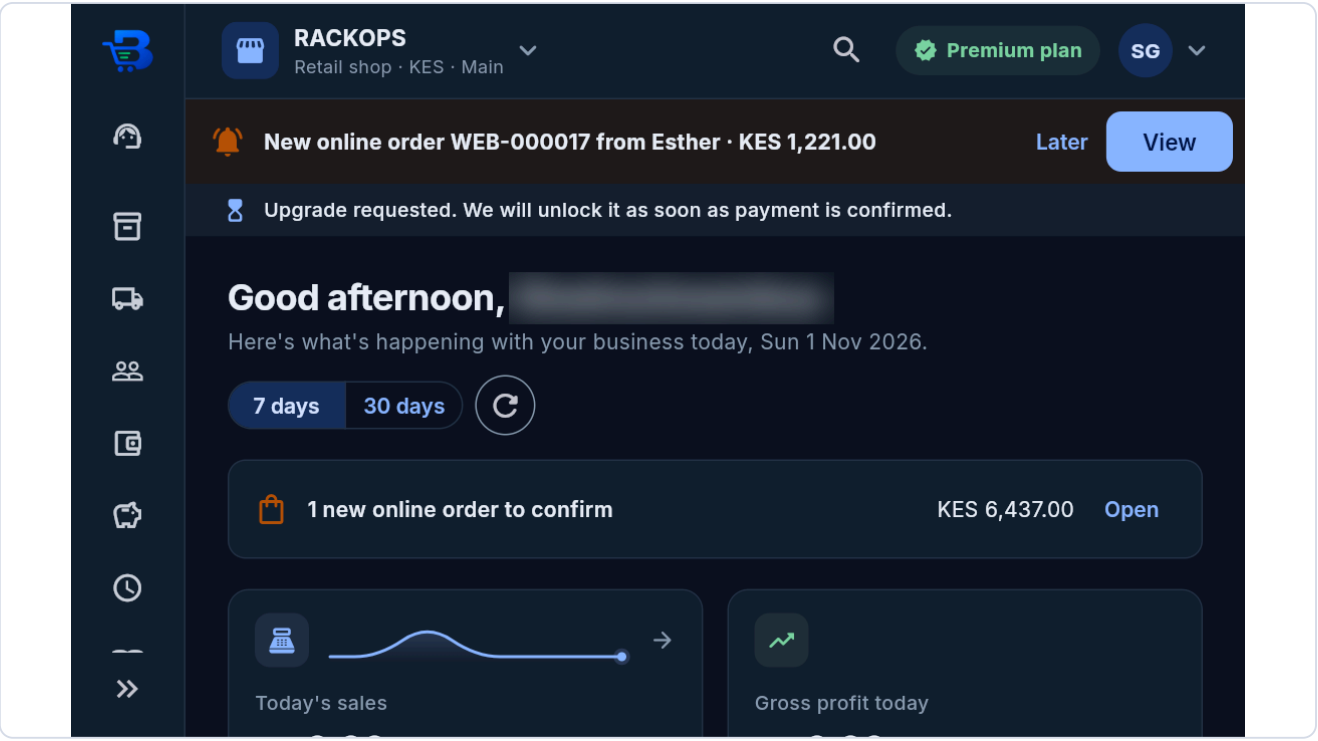
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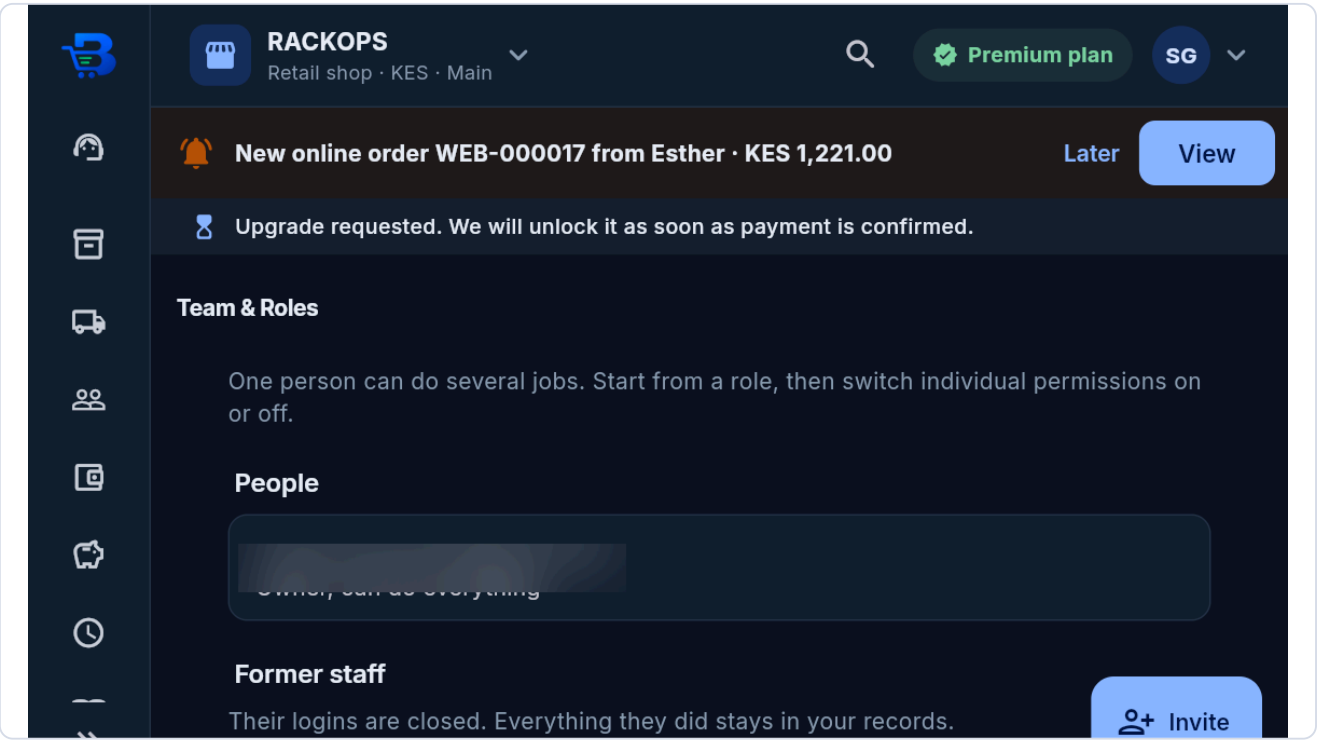
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PART 1

Getting started (owner)



The Overview: today's sales, money in by method and what needs attention



Team & Roles: invite staff and choose what each person can do

Try it first: on the login page, **Try a demo business, no sign-up** opens a sample business filled with realistic records. Choose the kind you want to see: a **shop**, a **restaurant and hotel** (tables, rooms, guests and an event), a **company** on the ERP (three branches, purchasing, production, staff and pay) or a **creative**

studio (jobs, invoices and a retainer). Change anything you like: the demo is deleted after 3 hours, and it never sends messages, M-Pesa prompts or anything else outside the app.

Your account: when you sign up, BlueDuka emails you a 6-digit code; type it to confirm your email before you open a shop. Forgot your password? Tap **Forgot your password?** on the login page, and we email a code to set a new one (codes work 15 minutes; everywhere you were logged in is logged out).

Plans: the Free plan is for trying BlueDuka: just you (no staff), 5 products, 10 sales in total (they don't start again each month; sales made during the free trial don't count) and up to 10 customers owing money at a time. Staff added during the free trial are paused (nothing they recorded is lost) until you choose a paid plan. When a limit is reached the app says which plan lifts it; upgrade in **Subscription & Billing** and pay by M-Pesa, for 1, 3 or 6 months, or a year for the price of 10 months (2 months free). Every new shop gets every feature free for the first month. ERP and manufacturing companies have their own plans (ERP Starter KES 4,999, ERP Business KES 9,999 with branches and warehouses, ERP Enterprise KES 19,999 with the API and no limits) after a month of everything free; restaurants and creative studios have theirs too (see 9b and 9c).

Business system: when you open a business, choose the system it runs on: **Retail POS** (shops, supermarkets, pharmacies, hardware…), **Wholesale and distribution**, **Restaurant and café**, **Manufacturing and production**, **General business ERP** (finance, procurement, HR and payroll, CRM, assets, budgets, branches) or **Creative studio**. Retail, restaurants and studios then pick their kind (a pharmacy, a café, web design…). One login can own several businesses of different systems, each with its own plan, staff and records.

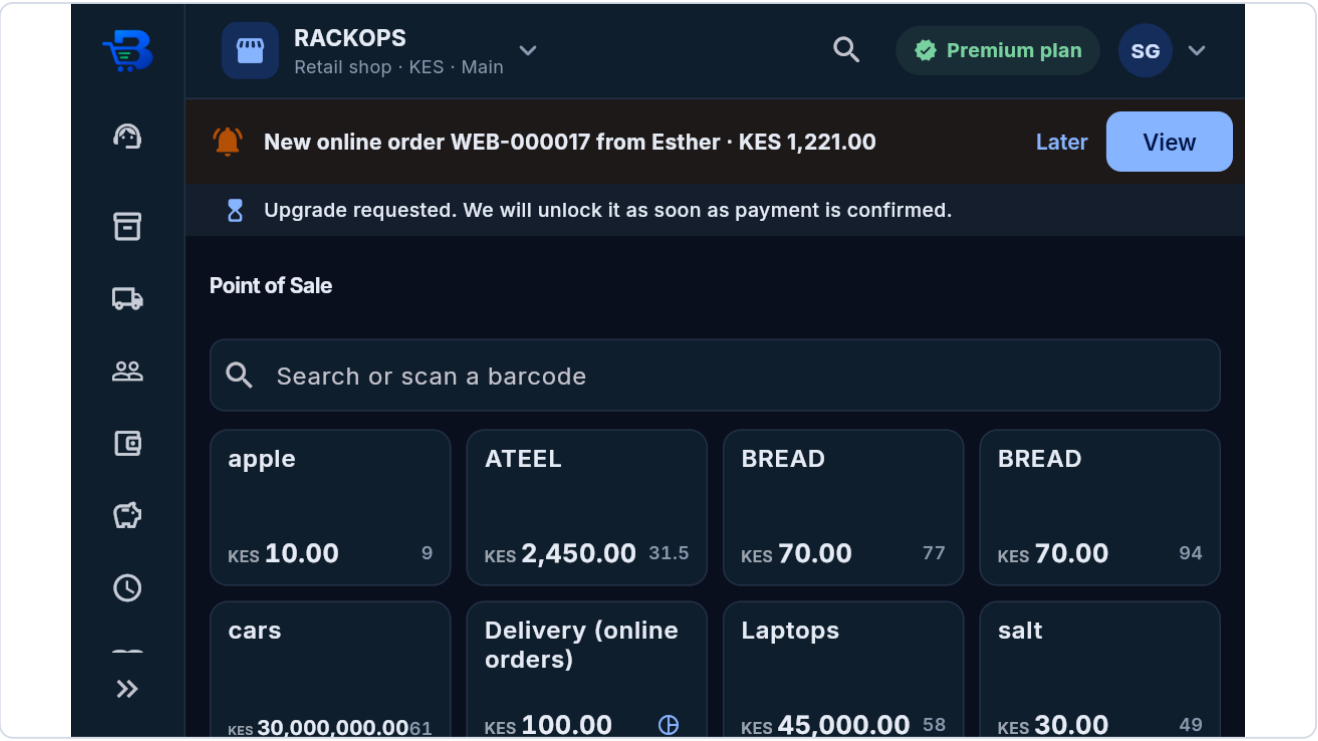
Start small, grow later: a shop can start as a plain POS and add more when it needs it. The owner opens **Grow your business** (shops) or the workspace home (wholesale, manufacturing, ERP):

- **Included** lists what came with the system; **Add when you need it** has a switch for each extra (loyalty points, the online shop, CRM, delivery, warehouses, budgets, assets…). A feature that needs a bigger plan says so when you switch it on. Switching one off hides it; its records are kept.
- **Move up to a bigger system**: a shop moves up to Wholesale or ERP, a wholesaler to ERP or Manufacturing. Everything recorded stays (products, stock, sales, customers and what they owe, suppliers, the books, the team); the menu changes and the features already used stay on. Tap **Move up** on the system you want: the next screen says what changes and, for a move to Manufacturing or ERP (which have their own plans), lists those plans with their monthly prices and marks the one recommended for your branches and team. Pick one:
  - **On a free trial**: the trial carries on as a trial of the new system; pay for the plan when it ends.
  - **On a paid plan**: the days you have left are turned into days of the new plan, worth the same money (20 days left of Business at KES 1,999 are worth about KES 1,333: that is 4 days of ERP Business at KES 9,999, or 8 days of ERP Starter at KES 4,999), starting at once, so nothing you paid for is lost. Then pay the new plan's monthly price by M-Pesa in **Subscription & Billing**, which opens for you after the move.
  - Moving from Retail POS to Wholesale uses the same plans: nothing changes in what you pay. ERP and manufacturing companies can switch the **Point of sale** on to keep a counter or factory shop.
- **Settings**: shop name, phone, receipt footer, and the payment methods you take.
- **Inventory**: add each product once, with selling price, buying cost and opening stock. The same name can't be added twice. To record more of a product, open it and add stock.
- **Team & Roles**: invite staff by email.
  - BlueDuka emails them a temporary password; they log in, choose their own password and join your shop.

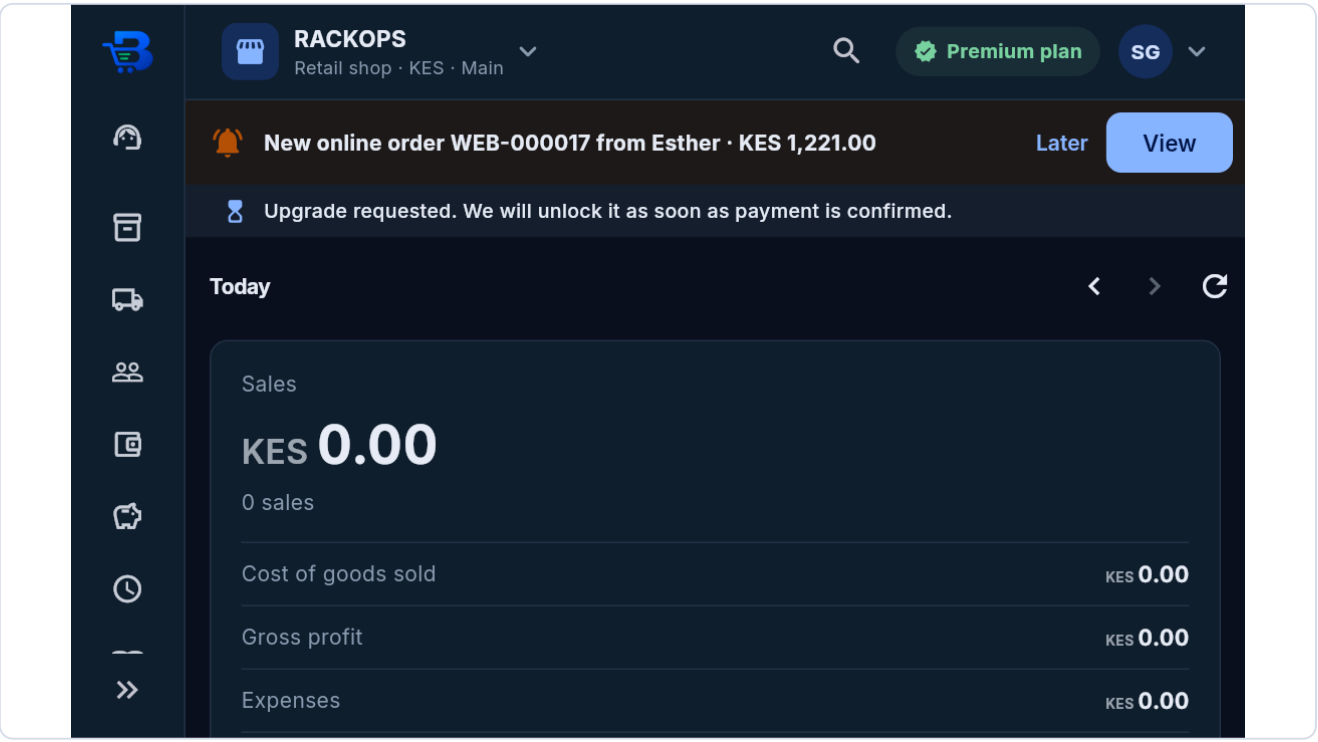
    - Pick a role (Cashier, Manager, ...).
    - With several branches, also pick the branches they work in. They only see those branches. Only managers and accountants work in several branches and switch between them; cashiers, customer service and stock staff work in one (the first one picked, or the main branch).
    - **More than one role**: a person can carry several default roles at once (a manager who is also the quality manager, a storekeeper who is also a quality inspector). Open them in **Team & Roles**, keep their main **Starting role** and tick the others under **Also carries these roles**; their permissions are added together. If the combination lets one person do two duties that should be separate (order goods, receive them and pay for them; set pay and pay salaries; make goods and release them from quality control; sell and check the till), BlueDuka warns you. It is allowed, for a small team, but it is safer to split them.
    - **Who can hand out roles**: only the owner changes what someone can do. Someone allowed to invite staff (a manager or HR officer) can only invite people into a role whose permissions they hold themselves, so nobody can create someone more powerful than they are. Only the owner invites managers and outside accountants.
    - **Colleagues' details**: everyone on the team sees who works there and their role. Phone numbers and exact permissions are shown only to the owner, HR and those who invite staff.
    - **Who sees what**: the owner and managers see everything; the owner can take any power away from a manager (switch it off in Team & Roles) or keep them to some branches. Only the owner and managers change the shop's settings (profile, payment methods, online shop, computers, points rules) and approve requests. Accountants see the books, expenses, reconciliation and reports only. Other staff see neither the settings nor the books.
- **Subscription & Billing**: your plan and paying by M-Pesa. New shops get a month with every feature.

PART 2

Selling



The point of sale: search or scan, then take cash, M-Pesa or credit



Sales: every receipt, with returns and reprints

- **Overview for cashiers**: a cashier's Overview shows only **their own sales for today**: how much they sold, money received by method, their best sellers today and their latest sales, plus low-stock alerts. Past days, trends, profit, the shop's debts and stock values are only for the owner and anyone given reports.

- **Point of Sale**: tap products or scan a barcode, then **Charge**.
  - Pay by cash, M-Pesa or another method, or **Pay later** (on credit, needs a customer).
  - **Cash + M-Pesa** (split): for a KES 4,500 bill paid with KES 4,000 cash and KES 500 by M-Pesa, choose **Cash + M-Pesa** and type the cash part; the M-Pesa part fills in by itself. Type the cash handed over to see the change, then send the M-Pesa prompt for the M-Pesa part (or find it in your till, or type the code). The receipt shows both payments.
- **M-Pesa**: there are three ways to take a payment.
  - **Ask the customer to pay (M-Pesa prompt)**: type their number, they get a PIN prompt for the amount on their phone, and as soon as M-Pesa confirms, the sale completes by itself with the M-Pesa code. Nothing to type. (Needs your till or paybill connected in Integrations.)
  - Tap **Find the payment in my till** to pick it from payments that arrived.
  - Type the code from the customer's message.
- **Receipts and returns**: every sale has a receipt. Returns are made from the receipt, and the stock goes back by itself.
- **Promotions** (owner, and managers): **Promotions > New promotion**. Choose % off or an amount off each item, on **every product**, some **categories** or **chosen products**, with a start and an end date (or end it by hand). The till shows the lower price with the old one struck through and applies it by itself; no cashier discount or approval is needed. Receipts show the offer's name. When two promotions fit a product, the bigger one is used. An amount off applies to whole items, not halves or quarters. What a promotion takes off can't be changed: end it and add a new one. Promotions work on the Windows app offline too.
- **Promotions on the online shop**: when creating a promotion choose **Till and online shop**, **Till only** or **Online shop only**. On the online shop page customers see the lower price, the old one crossed out and the offer; orders are priced with it. If an offer ends before an unpaid order is collected, the app asks to complete it at today's price; orders already paid online keep the price the customer paid.
- **Who may give discounts**: cashiers sell and take payment only. Discounts, promotions, returns and paying with points are for the owner, managers and the **Customer Service** role (Team & Roles). The owner can still give or take away single permissions per person.
- **Customer care and loyalty points** (Starter plan and above): **Customer care** is the customer desk.
  - The owner sets the rules under **Points rules** and turns points on. Common setting: 1 point for every KES 100 paid, 1 point = KES 1 off, usable from 100 points, for up to half of a bill; points lapse after 12 months without buying.
  - **Sign up**: customer service, managers or the owner sign a customer up with their own mobile number, after the customer agrees. Only registered numbers earn points.
  - **Earning**: at checkout type the member's number and tap **Find**; the sale earns points on what they pay. Or, after the sale, tap **Add loyalty points** on the receipt (within a day). Any cashier can do this.
  - **Paying with points**: managers and customer service type the points to use at checkout. If the shop can send SMS, the customer gets a 4-digit code to read out first, so only the phone's owner can spend the points.
  - Returns take back the points earned on what came back, and give back points that paid for it. Receipts show points earned, paid and the balance. Every change is kept in the member's points history; only the owner or a manager can correct points, with a reason.
  - Points belong to the whole business: a customer earns them in one branch and uses them in any other.
- **Approvals**: only the owner and managers approve. A promotion made by anyone else (customer service, say) always waits for their OK, on every plan. On the Business plan and above, **Approvals > Rules** (owner only) chooses which discounts, returns and refunds, and stock changes (from an amount,

or always) need a manager's OK.
    - When something needs approval, the cashier's screen says so and waits. Managers get a notification, open **Approvals**, see exactly what is asked (the products, quantities, amounts, the customer, the sale being returned and how the money goes back) and tap **Approve** or **Reject** (with a reason the cashier sees).
    - Once approved, the sale or return completes by itself on the cashier's screen. If they closed it, they finish it from **Approvals > My requests > Finish**, or **Withdraw** it.
    - Nobody approves their own request. The owner never needs approval. Requests nobody decides within a day, and approvals nobody uses within a day, expire.
- **Print or send**: from any receipt, invoice, quotation or online order, tap **Print** (A4 page, PDF, or an 80 mm receipt printer) or **Send on WhatsApp or SMS**. WhatsApp sends a **picture of the real receipt** (the same as the printed one: the shop's details, items, offers, payments, loyalty points and the KRA QR code when connected), with a short message, from your own WhatsApp.
    - **Android app**: type the customer's number, tap **Send**, then **Send on WhatsApp**. Their chat opens with the picture attached: press Send. The number does not need to be saved in your contacts. (WhatsApp Business is used if it is on the phone.)
    - **iPhone app**: tap **Copy picture and open the chat**. In the chat, tap and hold the message box, tap **Paste**, then Send.
    - **Computer**: tap **Copy picture and open WhatsApp**, then press **Ctrl+V** in the chat and Send.
    - WhatsApp always gets the picture, never a plain text. **SMS** sends a short text with a link to view, print or save it. For a walk-in customer, type their number; you can also save them as a customer.
- **Receipt printer** (Android and Windows apps): **Settings > Receipt printer**, for that phone or computer.
    - **Bluetooth** (phones): pair the printer in the phone's Bluetooth settings first (PIN often 0000 or 1234), then choose it.
    - **USB** (Windows): install the printer's driver (or "Generic / Text Only"), then choose it from the list.
    - **Network / Wi-Fi**: type the printer's IP address (hold FEED while switching it on to print it).
    - Pick **58 mm** or **80 mm**, tap **Print a test page**. Then every receipt has **Print receipt**, or switch on **Print every receipt after a sale**. The cash drawer can open by itself on cash sales.
    - On the website, keep using **Print** (A4 or 80 mm page).
- **Held stock warning**: if you add an item that is held for an online order, the till tells you, so you don't sell what a customer already ordered.
- **Live updates**: pages update by themselves. Sales on other tills, stock and payments appear within seconds.

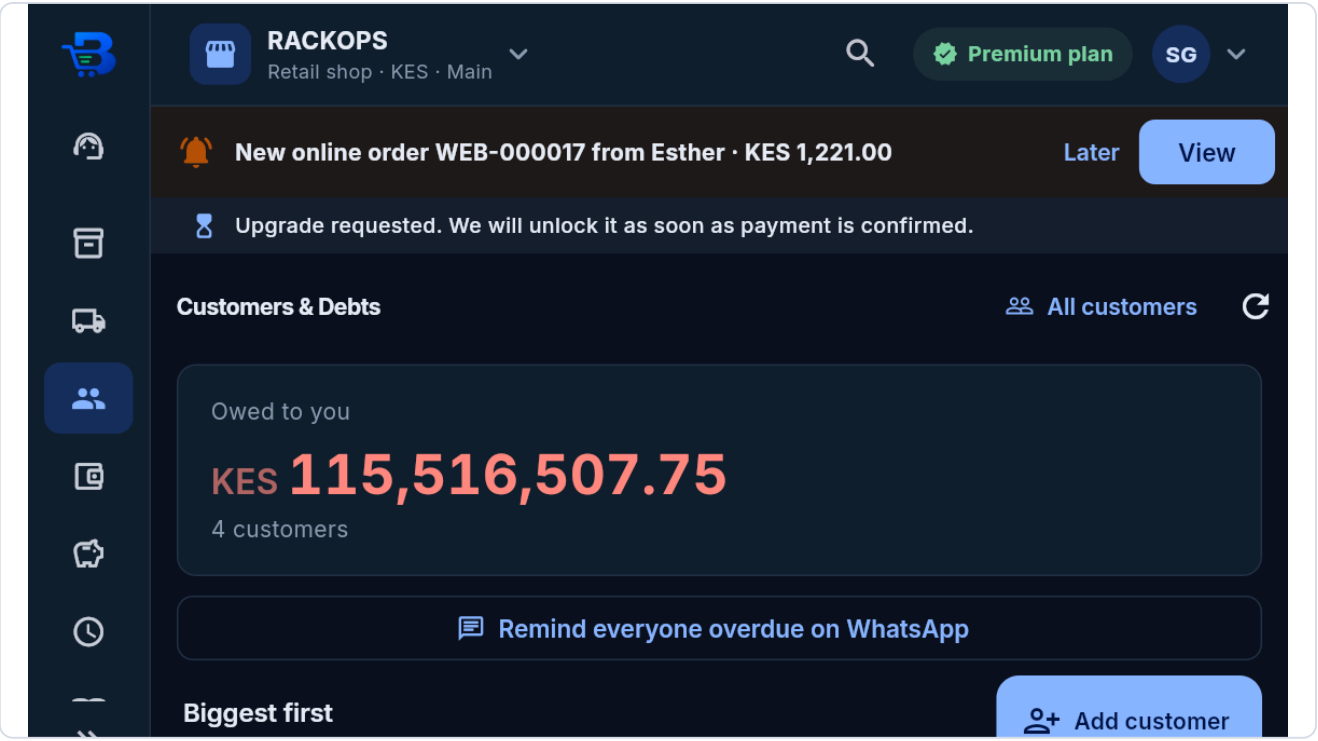
PART 3

Till shifts

1. **Open till.** BlueDuka shows the cash the last shift left in the drawer. Count it, then confirm it or enter what you found.
2. **During the shift**, M-Pesa and other electronic money is worked out for you. The expected cash is not shown to the cashier.
3. **Close till.**
   - Count all the cash in the drawer and enter the total.
   - BlueDuka compares it with what the records say should be there: **Balanced**, **Short** or **Over**.
   - That count is where the next shift starts, whoever opens it.
4. **Each shift keeps** its sales, electronic money, credit given and debts collected. It also keeps what customers owed at the start and at the end.
5. **Reports** show the busiest hours and each cashier's shifts (hours, sales per hour, short or over).

PART 4

Customers and debts



Customers and debts: who owes what, since when

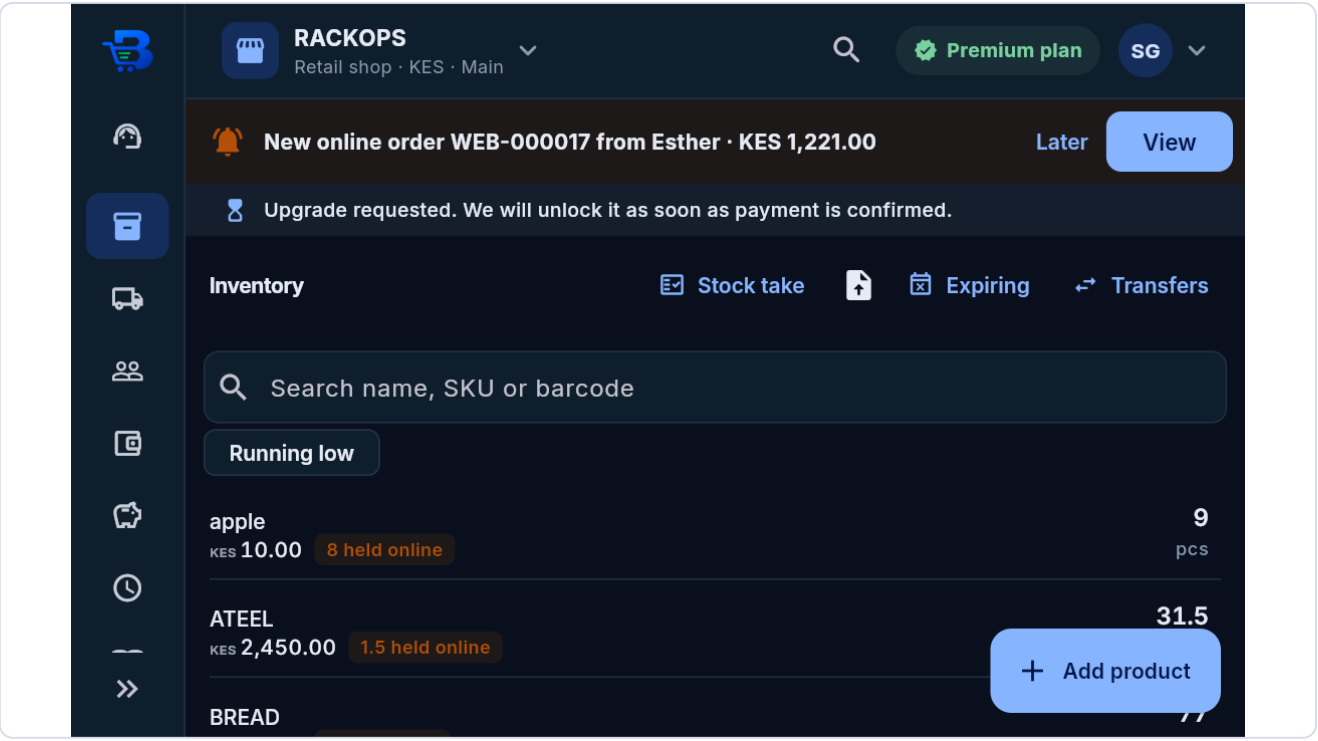
- **Credit sales**: sell on credit to a customer, with an optional credit limit. **Customers & Debts** shows who owes what.
- **Payments**: record a payment, or send an **M-Pesa prompt** for the debt. When the customer pays, the debt goes down by itself.
- **Automatic matching**: money a customer sends to your till counts against their debt automatically. This happens when:
  - it comes from their own number, or they used their number as the paybill account; and
  - no sale used the payment within 10 minutes. The owner can switch this off in **Integrations > M-Pesa**.
- **WhatsApp reminders**: no setup, no API keys.
  - **Remind on WhatsApp** opens WhatsApp with the amount and message ready, sent from your own number.
  - **Remind everyone overdue on WhatsApp** goes through everyone who has owed for 3 days or more, one tap each.
- **SMS**: on a phone, the SMS app opens with the message ready. Automatic texts work once the BlueDuka team has switched on its SMS account.
- **Bringing your customers in** (Customers & Debts > All customers > **Import**): an Excel (.xlsx) or CSV file with a Name column, and if you have them Phone, Email, KRA PIN, **Owes**, Credit limit and Notes.
  - The file is checked first; nothing is saved until you press Import, and then every row is saved together.
  - "Owes" is what the customer owed before you started with BlueDuka (their opening balance), dated on the day you choose. It shows in their balance, debts, statements and reminders and is paid off like any debt, but it is not a sale: it is left out of sales figures and eTIMS. In the books it is "Opening

balances".

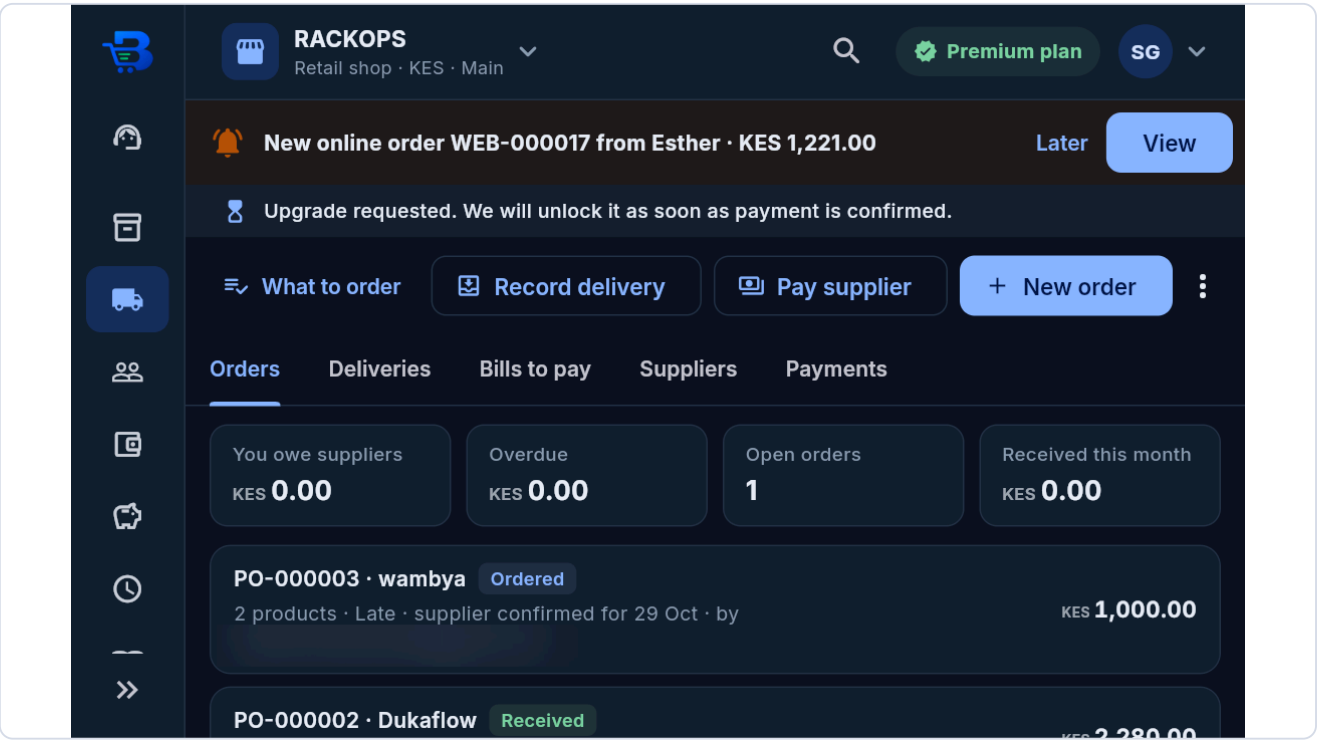
- A customer already in BlueDuka (same phone, or same name) is updated. An opening balance is recorded once per customer, so importing the same file twice never doubles a debt.

PART 5

Stock and purchases



Inventory: stock per branch, low-stock alerts and counts



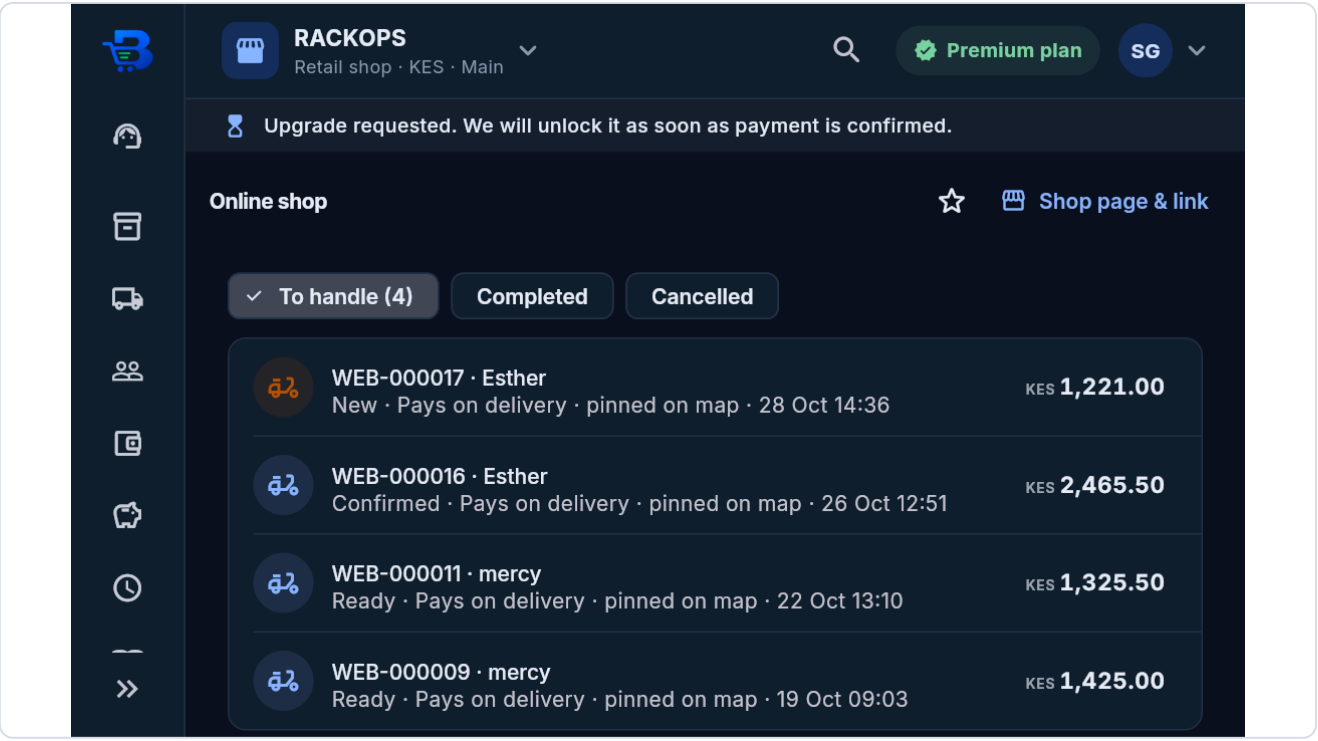
Purchases: orders, deliveries, bills and supplier payments

- From each product you can:
  - receive deliveries;
  - count stock;

    - adjust stock, with a reason.
- **Selling in parts** (e.g. a steel tube by the half): when adding a product, tick Half, Quarter or Eighth and set each part's own price. At the till, tapping it asks Whole, Half or Quarter. The part's price is charged and stock goes down by that fraction (3 halves = 1.5 tubes). Receipts show "3 × Half".
- **One product per name**: adding a name that exists offers to add stock to it, or to restore it if it was deleted.
- **Deleting a product** (owner, managers, stock controllers): open it and tap Delete product. It disappears from the till, lists and online shop. Past sales keep showing it. If it was never stocked or sold, it is removed completely.
- Low-stock alerts show what to reorder.
- **Expiry dates** (food, drinks, medicine, cosmetics): turn on "Track batches & expiry dates" on the product.
    - Each delivery then asks for the expiry date on the pack, and a batch number if it has one.
    - Sales take stock from the batch that expires first. Returns go back into the batch they came from, and transfers keep the batch and its date.
    - **Inventory > Expiring** lists what has expired or expires soon, what it is worth and a suggested discount (10% with a month left, 20% with two weeks, 30% in the last week). Set a clearance price or write the batch off from there. Write-offs follow your approval rules.
    - The warning period (30 days by default) is in Settings.
- **Serial and IMEI numbers** (phones, laptops, TVs, appliances): turn on "Track serial / IMEI numbers" on the product.
    - **Serial numbers > Record units in**: scan each unit's number when it arrives (a scanner adds a new line after each), with the warranty. The stock count still comes from the delivery.
    - At the till, checkout asks for the number of each unit sold: scan it, type it, or tap one in stock. The receipt prints it. A number never recorded on the way in is accepted and recorded as sold.
    - **Inventory > Find serial** shows any unit: in stock or sold, to whom, the receipt and the warranty left.
    - A return puts the unit back in stock (or marks it returned when it is not put back on sale). When only some units on a line come back, choose which.
    - Sales made on the Windows app without internet, and online-shop orders, don't need the numbers.
- **Purchases**: suppliers, purchase orders and goods received. Bills and supplier payments are for the owner.
- **What to order** (Purchases): products at or below their low-stock level, or that will run out within two weeks at the rate they sell, less what is already on order. They are grouped by the supplier who last delivered them, with that delivery's cost. Tap **Make order**, check the quantities, and place it.
- **Send to supplier**: WhatsApp (a picture of the order, plus the link to reply), SMS or email the order's link. The supplier opens the link without an account, prints it or saves it as a PDF, and replies: **confirm** with a delivery date, or **can't supply** with a reason. The order shows "seen", "confirmed for 14 Oct" or "can't supply", and **Late** once the date passes without delivery.
- When the goods arrive, **Receive goods** on the order: stock goes up, and a supplier bill is created.
- **Several branches**: stock is kept per branch, and you can move stock between branches.

PART 6

Online shop (Starter plan and above)



Online orders arrive in the app with the customer's details

- **Online Shop > Shop page & link** (owner): switch on "Taking online orders", choose collection, delivery (with a fee and the areas you cover) and whether customers may pay on delivery or collection.
- **Photos and descriptions**: in Inventory, open a product > **Photo and description**. On a phone tap **Take photo** (or **Choose photo**), and type a few words customers should know (size, colour, what it is for). Customers see the photo on your shop and can tap a product to see it big with its description. Photos are made smaller and any camera details or location are removed before they are kept. A clear photo on a plain background sells best.
- Share the link on WhatsApp (status, groups), Facebook or Instagram. The QR code shows on the same page: **Print QR poster** prints a page with your shop's name, "Scan to order" and the code; **Save QR picture** keeps it as an image. Print it before you open the shop if you like.
- Customers see your products and prices, add them to a cart and order with their name and phone number, then **collect** at the shop or get it **delivered**. With M-Pesa connected in Integrations they **pay online** with a PIN prompt when they order; the payment is confirmed by M-Pesa by itself and shows on the order.
- **Delivery pin**: at checkout the customer types their area or landmark and taps **Find on map**, or taps **Use my location (GPS)**, then drags the pin to their exact gate (or just taps the map on their place).
  - A computer, or a phone with Location/GPS off, only knows where its internet line is registered (often another country, e.g. Germany). BlueDuka never uses such a location: it refuses anything outside the country, far from the shop, or rougher than 1.5 km, and asks the customer to tap their place instead.
  - If the customer doesn't pin at all, BlueDuka finds the typed address on the map and marks it **approximate** so the rider knows to call.

- **Delivering**: open the order. The **Delivery** box shows the pin on a map, the address and either **Paid** or **Collect KES ...**. Tap **Directions** for Google Maps, or **Send to rider**: type the rider's number (it is remembered) and send on WhatsApp or SMS. The rider gets one clear message (customer, phone, address, map link, items, how much to collect) and a private rider page with the map, a **Navigate** button, **Call** and **WhatsApp** the customer. The rider page works for 7 days and shows only that delivery.
- **The customer's receipt**: their order page has a download button that changes with the payment: before paying it is the order ("Not paid yet"); once M-Pesa confirms it becomes a **Payment receipt** marked PAID with the M-Pesa code and time; when you record the sale it becomes the full receipt, which they can also print. The page updates by itself when the payment arrives.
- **Alerts**: when an order comes in, everyone who handles online orders gets a sound, a banner on every page ("New online order WEB-0004 from Wanjiru") and a number on Online Shop until someone confirms it. They also get an email for new and paid orders (the owner can switch emails off in Shop page & link).
  - **Notifications when BlueDuka is closed**: in **Settings > Notifications on this device** tap **Turn on notifications** on each phone or computer browser. New and paid orders, approval requests and supplier replies then pop up even when the app isn't open.
- **Shop location** (owner, with delivery on): in **Shop page & link**, tap your shop on the map and **Save location**. Customers' maps open there, and pins far from your shop are refused.
- **Rider's report**: on the rider page the rider taps **Delivered** and says what they collected: cash (amount), M-Pesa (the code from the customer's message) or nothing. The order shows it, everyone handling orders is alerted, and **record the sale** is filled in with it.
- Never shown online: buying costs, stock values, other customers, staff. To hide a product, open it in Inventory and switch off "Show in the online shop".
- **Online sales are normal sales**: they show in Sales (tagged **Online**, with a Till / Online shop / Invoices filter), count in today's sales, reports, profit and the customer's history, and take stock off the shelf like any till sale.
  - **Paid online**: the sale is recorded **the moment M-Pesa confirms**, at the price the customer paid. Stock leaves the shelf then. The order stays open until you deliver or hand it over (**mark delivered**).
  - **Pay on delivery or collection**: the items are **held** as soon as the order comes in. Inventory shows "2 held online" and the online shop won't sell them to anyone else. They leave the shelf when you record the sale at hand-over (or come back if the order is cancelled).
  - **Reports** show **Sales by channel** (till, online shop, invoices, with each one's share) and **Sales by category** (with the online part), and Insights tells you what share the online shop brings and which category sells best online.
- **Online Shop** lists the orders. For each order:
  - **Confirm** it;
  - mark it **ready** or **out for delivery**, with one tap to tell the customer on WhatsApp;
  - when the customer has the goods, **record the sale**. Stock then leaves the shelf, and the money (M-Pesa paid online, plus cash or M-Pesa taken at the door) goes into today's sales.
- If a price changed since the order, the app asks before using today's price. Cancelling needs a reason, which the customer sees.
- **Cancelling a paid order**: send the refund to the customer by M-Pesa first, then cancel and type the refund's M-Pesa code. BlueDuka reverses the sale (a return, refunded by M-Pesa) and puts the stock back in one step.
- The customer gets a private link to follow their order and to message the shop on WhatsApp.

PART 7

Staff time and pay (Business plan and above)

- **Time & Pay > My time**: everyone taps **Clock in** when they start and **Clock out** when they leave, and sees their own hours and payslips.
- For the owner, or anyone given "Staff clock-in records, pay settings, advances and the pay sheet":
  - **Pay settings**: monthly salary, pay per day worked, or commission only. Add a commission % on the sales the person rings up (less returns), and choose whether till shortages from their shifts come off their pay.
  - **Team**: who is at work now, and every clock-in. A missed day or a forgotten clock-out is fixed with a reason, which is kept in the activity log.
  - **Pay sheet**: worked out live from clock-ins, sales, shifts, advances, bonuses and deductions. **Approve** it at month end; each person then sees their payslip, which can be printed or sent on WhatsApp as a picture. **Mark paid** (cash, M-Pesa, bank) also records a salary expense, so profit reports include it. A sheet can be reopened until someone is marked paid.
- The pay sheet is gross pay **before PAYE, SHIF, NSSF and the Housing Levy**: your accountant works those out.

PART 8

Credit score and certified reports (owner)

- **Credit Score** (owner only, every plan) shows a score from **300 to 850** worked out from the last 6 months of your records: how many days you sell, how much, whether sales are growing, how long you have kept records, whether customers on credit pay back, how much money comes by M-Pesa, Airtel, bank or card (and is confirmed by Safaricom), profit after buying costs and expenses, and supplier bills and till closings. Each part shows its points and a tip to raise it. Parts you don't use (no supplier bills, no till shifts) are not counted against you.
- Bands: 750+ Excellent, 670 Good, 580 Fair, 500 Developing, below 500 Needs work. A new shop sees a **provisional** score until it has 30 days of records, 20 days with sales and 50 sales.
- **Make certified report (PDF)** (Business plan and above): a signed report to give a bank, SACCO or supplier. Each report has its own serial number (BD-CR-...), a QR code, and is valid for 90 days. Up to 3 a day.
- The lender scans the QR code or opens **api.blueduka.co.ke/v/** and types the serial: the page shows the figures BlueDuka issued, whether the report is still valid, and checks the PDF file itself. A changed file, a made-up serial or a withdrawn report shows as not genuine.
- In the list you see how many times each report was checked. **Withdraw** a report sent to the wrong person.
- The score uses only your BlueDuka records. It is not a credit bureau (CRB) score and BlueDuka does not lend money.

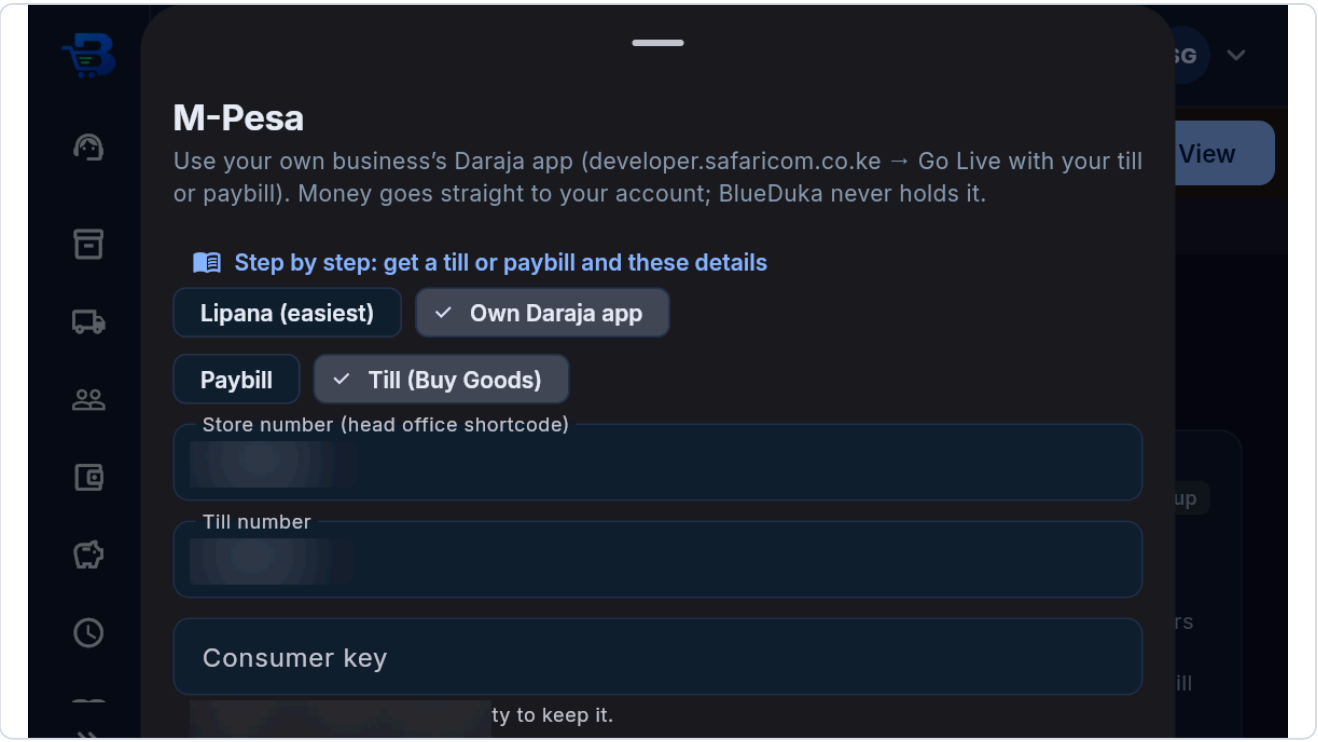
PART 9

Accounting books (Business plan and above)

- **Accounting** (Operations) keeps double-entry books by itself. Every sale, payment, customer return, expense, delivery, supplier bill and payment, return to a supplier, stock count or adjustment and till shortage becomes a balanced journal entry. Nothing extra to type; older records are added the first time the books open.
- **Overview**: this month's sales, gross profit, expenses and net profit, and the money in cash, M-Pesa, bank and other accounts.
- **Statements**: profit and loss, balance sheet and trial balance for any period. Tap an account to see its entries with a running balance, and an entry to see its lines.
- **Journals**: every entry. **Manual journal** (accounting.journal permission) is for what the shop's records don't cover: a loan, the owner putting money in or taking it out, depreciation, suppliers' VAT invoices, corrections. Debits must equal credits. Entries are never edited or deleted; **Reverse** cancels a manual journal with an opposite entry.
- **Accounts**: the chart of accounts. Add your own (e.g. a second bank account). BlueDuka's own accounts keep their type.
- **Reconcile**: upload the M-Pesa statement (M-PESA business portal, export as CSV) or a bank statement saved as CSV. Each line is matched to a payment, expense, supplier payment or refund by its transaction code, or by the same amount within 2 days. Lines not in the books can be **posted** to an account (e.g. M-Pesa charges to "Bank and M-Pesa charges") or ignored. The page also lists money recorded in BlueDuka that is missing from the statement, often a mistyped M-Pesa code.
- **Tax**: for the chosen month, VAT (output VAT from sales, input VAT from what was posted to "VAT on purchases") for VAT-registered shops, or Turnover Tax (1.5% of gross sales) for the others, the due date (the 20th of the next month) and, only for shops that connected KRA eTIMS, how many sales KRA has accepted. A summary to help filing, not a filing.
- **Questions**: the accountant asks about an entry or anything else; the shop answers here.
- **Close a month** (accounting.close): its figures then never change. Anything recorded later with an earlier date goes into the first open day, keeping its real date. Only the owner can reopen.
- **Export the books**: a ZIP of CSV files (trial balance, profit and loss, balance sheet, general ledger, chart of accounts, and journals in the layout Xero, QuickBooks and Sage import).
- **Your accountant**: in Team & Roles, **Invite someone** and choose **Outside accountant** (owner only). They see the books and reports, post journals, match statements and close months, but cannot sell or change stock. They use no staff place, and one accountant can do the books of several shops (up to 3 outside accountants per shop). Staff can also be given the **Accountant Set** role, which now includes the books.
- Not included yet: payroll deductions (PAYE, SHIF, NSSF, Housing Levy). Record them as manual journals.

PART 10

M-Pesa and other connections (owner)



M-Pesa set-up: your own till or paybill

Until M-Pesa is connected, the app says so at the checkout with a **How to set it up** button that opens these same steps. Staff are asked to tell the owner.

M-Pesa (your own till or paybill), Business plan and above. Done once; money goes straight to your account.

1. **Get a Business Till or Paybill** from Safaricom: apply on M-PESA for Business (m-pesaforbusiness.co.ke) or at a Safaricom shop. Have ready the administrator's ID, your KRA PIN, business registration certificate or permit, a bank letter or cancelled cheque, and a Safaricom line in your name. You get a **Store number** and **Till number** (Buy Goods) or a **Paybill number**, and M-PESA business portal access for your administrator. Pochi la Biashara and personal numbers can't be connected.
2. **Open a free Daraja account** at developer.safaricom.co.ke.
3. **Go Live** in Daraja: enter the Store number (till) or Paybill number, your business name and the username of your M-PESA portal administrator, then the one-time code Safaricom sends to the administrator's phone. Choose M-PESA Express (Lipa na M-PESA Online) and C2B.
4. **Copy your keys**: Daraja > My Apps > your live app gives the **Consumer Key** and **Consumer Secret**; Safaricom emails the **Passkey** to your administrator (if not, ask apisupport@safaricom.co.ke). Keep them private.
5. **Connect in BlueDuka**: Integrations > M-Pesa till / paybill > Own Daraja app > Live; choose Till (Store number and Till number) or Paybill (Paybill number); paste the three keys; switch on; Save. Payments then appear at the checkout by themselves.
6. **Test**: sell KES 10, choose M-Pesa > Ask the customer to pay, and pay with your own phone.
7. No Daraja approval yet? Choose **Lipana** in the same screen and paste your Lipana secret key instead.

Airtel Money

- Easiest: Airtel Money (and T-Kash) customers can pay your **M-Pesa till or paybill** directly from their Airtel menu. It reaches you as a normal M-Pesa payment, so with M-Pesa connected it is confirmed by itself (choose M-Pesa at checkout). Safaricom charges the till a small fee on these (currently 0.5%, at most KES 200).
- Or get your own **Airtel Money till** at an Airtel shop (usually ID, KRA PIN and business registration or permit), then save it in **Integrations > Airtel Money**. Cashiers see it at checkout and it prints on invoices. At checkout choose Airtel and type the transaction ID; check the message on your Airtel line first (not confirmed automatically).

Bank and card

- Save your **bank name, account name, account number, branch** and your **bank's M-Pesa paybill** in **Integrations > Bank & card**. Customers then see where to pay at checkout and on invoices (How to pay), with the receipt or invoice number as the reference.
- Customers pay by transfer or PesaLink, by M-Pesa to your bank's paybill with your account number, or by card on a card machine (PDQ) from your bank. At checkout choose Bank or Card and type the reference or approval code; check your bank's message or app before handing over goods for a transfer.

KRA eTIMS (optional), Business plan and above. Only if your business needs it: nothing about KRA shows in BlueDuka (receipts, settings, reports) until you connect it here. Once connected, every sale goes to KRA by itself in the background. Done once per branch, with **your shop's own KRA registration**: you apply to KRA yourself and KRA decides whether to approve it. BlueDuka is not a KRA-certified eTIMS integrator. Full guide: blueduka.co.ke/kra-etims.

1. Have your **KRA PIN and iTax password** (itax.kra.go.ke).
2. On the **eTIMS portal** (etims.kra.go.ke; the test portal is etims-sbx.kra.go.ke), choose **Sign Up** with your PIN, then **Service Request > eTIMS** and pick **OSCU (Online Sales Control Unit)**, the type for businesses that sell with their own software (not eTIMS Lite or the Client app). Upload KRA's **eTIMS Commitment Form**.
3. When KRA approves (by SMS), note the **device serial number** and your **branch id** (head office is usually 00). If KRA also gave you **API keys** (Consumer Key and Secret), keep them.
4. **Connect in BlueDuka**: Integrations > KRA eTIMS: tick that the registration is your shop's own, enter the KRA PIN (it is then printed on your receipts and invoices), branch id, device serial (and API keys, if any). Test first; when KRA has approved you, tick that, choose **Live** and **Save and connect**. Choose a default KRA item class and switch on sending every sale.
5. **Set each product's tax** in Inventory (VAT 16%, exempt, zero-rated...), and switch on **VAT-registered** in Settings if you are.
6. **Check a receipt**: once KRA accepts a sale, its receipt shows KRA's invoice number, signature and QR code. Sales still waiting or rejected never show on customers' receipts: Integrations > KRA eTIMS shows them, with the reason, and sends them again.
7. **API keys and webhooks** (Premium): connect other software. See DEVELOPERS.md.

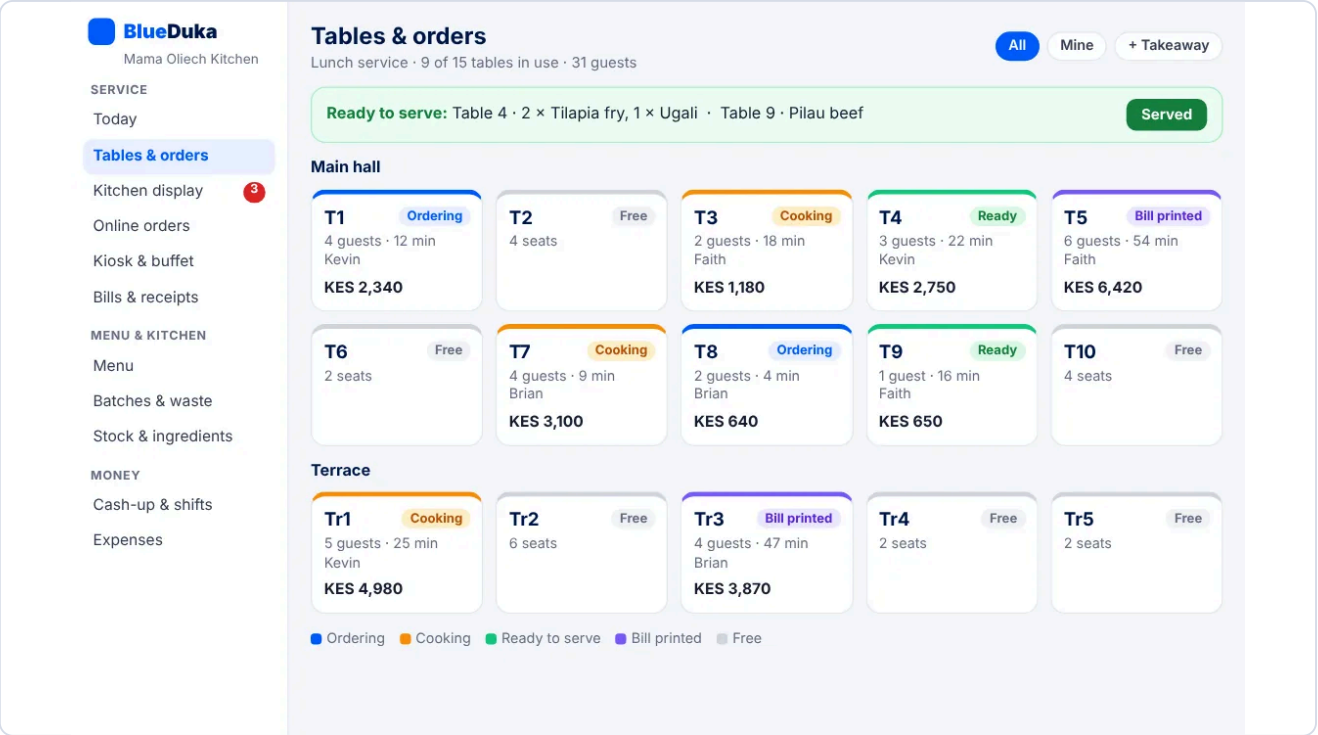
PART 11

Installing BlueDuka and working offline

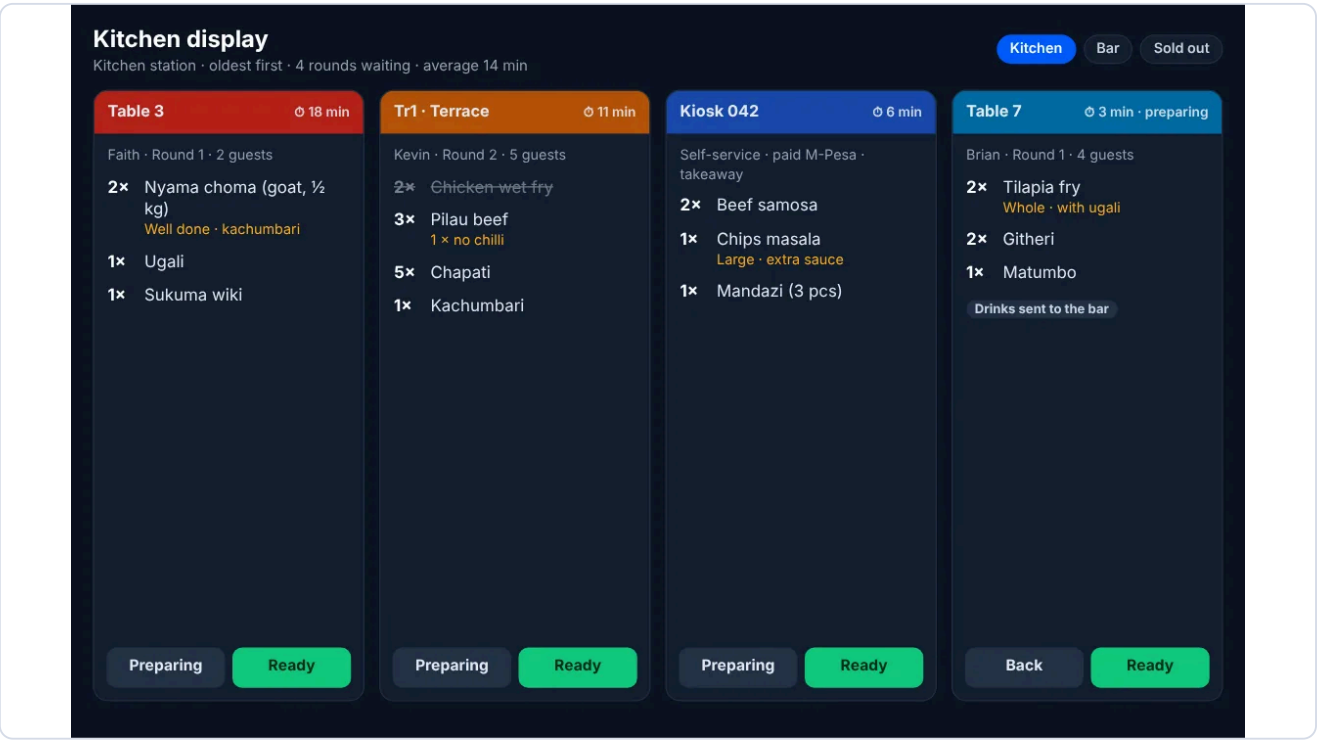
- **Android**: download it from blueduka.co.ke/download (BlueDuka is not on Google Play). Allow your browser to install unknown apps when the phone asks, then tap Install. When a newer version is out, the app tells you and installs it over the old one, keeping your data.
- **Windows**: download it from blueduka.co.ke/download, Help & guide, or the **Computers** page.
- **iPhone and iPad**: open blueduka.co.ke/app in Safari, log in, tap **Share**, then **Add to Home Screen**. It opens from its own icon and works offline like the apps. The same works in Chrome or Edge on a computer (**Install BlueDuka** in the address bar). A plain browser tab needs internet, so on a shared computer nothing is kept.
- **Computers per plan**: each plan allows a number of computers; phones, tablets and BlueDuka installed from the browser are not counted. Every device appears under **Computers**, and the owner can remove a lost one: it stops at once.
- **Without internet**, the Windows and Android apps and BlueDuka installed from the browser keep doing most of the daily work (open it online once a day so prices and stock stay up to date):
  - **Selling**: cash, typed M-Pesa codes and credit sales; returns on sales already uploaded (open the sale once while online); new customers and debt payments.
  - **Till**: open and close shifts. Whether a shift balanced shows once it uploads.
  - **Stock**: add new products, change prices, receive stock (with batch and expiry dates), counts and adjustments.
  - **Purchases**: purchase orders, deliveries from suppliers (direct or against an order opened once online) and supplier payments.
  - **Staff and money**: clock in and out, and expenses.
  - **Reading**: products, customers, today's sales, debts, the till, purchases and reports show the last copy from when the device was last online.
- Everything is kept on the device (in the app's private storage) and uploads by itself, in order, when the internet is back. Nothing is recorded twice. The strip at the top shows what is waiting. A big refund or stock change that needs a manager's approval waits in **Offline records** until it is approved.
- **Discounts offline**: discounts on items work offline. A discount at or above the amount that needs approval asks for a manager's **offline PIN**, typed on the device. Each owner or manager sets theirs while online in **Settings > Offline approval PIN** (4 to 6 digits, not easy to guess). Every offline approval is in the Activity log, and anything that wasn't properly approved is flagged and the managers are told when it uploads.
- **Invoices offline**: make invoices as usual; the invoice number is given when it uploads.
- **Needs the internet**: a discount on the whole order, M-Pesa PIN prompts, other approvals, transfers between branches, online shop orders, the pay sheet, reports for other periods, and settings.

PART 12

Restaurants and cafés



Tables and orders



The kitchen display

A business set up as **Restaurant or café** opens on **Tables** and has its own plans: **Café** (KES 1,499 a month), **Restaurant** (KES 2,999) and **Restaurant Pro** (KES 5,999), after a one-month trial of Restaurant Pro. There is no free plan: when nothing is paid, every record is kept but new orders wait until a plan is paid. Restaurants are being tried with a few businesses first: call or WhatsApp BlueDuka to join.

A restaurant account only has what a restaurant needs: shop features such as promotions, loyalty points, invoices, credit reports and customer service roles are left out, and staff roles include **Waiter** and **Kitchen**. Screens update by themselves as orders, tables, the kitchen and payments change, on every device, so nobody needs to refresh.

- **Your own screens**: a restaurant or café doesn't see the shop's till, online shop or invoices. Its menu is laid out the way restaurants work:
  - **Service**: **Today** (sales, guests, tables in use, how long the kitchen is taking, best sellers, how guests paid, and the steps left before your first service), **Tables & orders**, **Kitchen display**, **Online orders**, **Kiosk & buffet**, **Bills & receipts**.
  - **Menu & kitchen**: **Menu** (dishes and drinks in sections, with photos, prices and a few words for guests; switch one off when it runs out), **Batches & waste**, **Stock & ingredients**, **Suppliers & purchases**.
  - **Money**: **Cash-up & shifts**, **Expenses**, **Regulars & tabs**, **Accounting**.
  - **Staff**: **Staff & roles**, **Shifts & handover**, **Hours & pay**. Then **Owner view**, **Service reports** and **Floor & kitchen setup**.
- **Set up** (Floor & kitchen setup): add your tables (and areas such as Terrace). On the Restaurant plan, add stations (Kitchen, Bar) and choose which menu sections go to each, add item options (Size: Small, Large +KES 50) and recipes (one plate of Pilau uses 250 g of rice and 30 ml of cooking oil). Choose a service charge and whether waiters may take payment.
- **The menu** (Menu): add sections (Breakfast, Mains, Drinks), then each dish or drink with its price, section, photo and a short description. Bottled drinks and packaged snacks can have a **barcode** (type it, use a USB or Bluetooth scanner, or tap the camera on a phone) and **Count its stock** on: they are then received into stock by scanning (Stock & ingredients or Suppliers & purchases) and come off stock as they are sold. Dishes cooked in the kitchen leave it off: their ingredients are counted through recipes. Scanning a code nothing has yet offers to add it. Ingredients you buy but don't sell as they are (rice, cooking oil) go under **Ingredients & stock items**: they keep their stock and work in recipes, but waiters and guests never see them.
- **How ingredients are counted**: each ingredient is counted in the unit you buy it in, chosen under **Counted in** when you add it: cooking oil, milk and juice in litres; onions, tomatoes, rice, flour, sugar and meat in kilograms; eggs and bread in pieces. Add its **buying cost** per litre or kg (a 20 litre jerrycan for KES 5,000 is 250 per litre); purchases keep it up to date. Receive stock in that unit (a 20 litre jerrycan is 20, a 50 kg bag of onions is 50). Recipes and waste can then be typed in **ml** or **grams**: one plate uses 30 ml of oil and 150 g of onions, and BlueDuka takes 0.03 litres and 0.15 kg off the stock. As a guide, a tablespoon is about 15 ml, a cup about 250 ml and a medium onion about 150 g. An ingredient first added in pieces by mistake can be changed under **Counted in**; then count it and correct the stock, and check its recipes.
- **Taking an order**: tap a free table, choose the number of guests, **Add items** (tap them, or scan a bottled drink's barcode with a scanner or the phone's camera), then **Send to kitchen**: the items become a round and a kitchen copy prints (each station on its own printer, set per device). Add more rounds any time. **Takeaway** opens an order without a table.
- **Changing an order**: take off an item not yet sent at any time; an item already sent needs a reason and the void permission (a manager's approval above the amount set in Approvals). **Move or merge** tables, **hand an order to another waiter**, or **cancel** it (with a reason). Everything is in the activity log and the restaurant reports.
- **Paying**: **Pay** settles the whole bill, or on the Café plan and above **Choose items** for split bills, with one or more payments (cash with change, M-Pesa code or PIN prompt, card, bank), the service charge and a tip (recorded for the staff, never part of sales or the till). The bill becomes one ordinary sale: receipts,

M-Pesa, stock, books and eTIMS work as for any sale. A bill can never be charged twice.

- **Who has paid**: every table shows where its bill stands: **Unpaid**, **Bill printed** (waiting to pay), **Payment pending** (an M-Pesa prompt sent, not answered yet), **Part paid** or **Paid**. The cashier or a manager can take a **part-payment** (a guest pays some now, online only); it is used first when the rest is paid, so the whole order is still one sale. An order with a part-payment can't be cancelled, and items can't be taken off below what was already paid.
- **Shifts & handover**: a waiter taps **Start my shift** (morning, evening...). A manager can give them a section or particular tables. **Take a break** and **Back from break** keep the times. The shift shows, live, the bills of the orders they took, the guests, what they took in cash and M-Pesa, their tips (kept apart from the till) and their tables still open. **End shift & hand over** never closes or pays a table: open tables stay with them or go to a colleague on shift, by name, with a note for the next shift. The waiter says how much cash they hand in; a manager counts it and approves (a different manager for their own shift). A short or over count needs a note and stays on record. A manager can end a shift someone forgot, with a reason (in the activity log). Sales stay with the waiter who took the order, even after it is handed on. Switch on **Waiters start a shift before opening tables** in Floor & kitchen setup to make shifts required. When the shop uses Hours & pay, starting and ending a shift also clocks in and out.
- **Batches** (Restaurant plan, Batches & waste): for dishes cooked ahead (a pot of pilau, a tray of chapatis), a manager opens **Batch dishes** and taps **Cook in batches** on the dish, with a usual number of portions and, if you like, how many hours it may be served. A dish without a recipe shows **Add recipe**: write what one plate uses there, and the batch settings follow. **Change** and **Stop** are on each batch dish. **Cook a batch** takes the recipe's ingredients for all its portions out of stock at once; plates sold then come out of the pot, so nothing is counted twice. A plate counts as paid for from the pot when its bill is paid; plates already served on tables not yet paid show as **on tables**. Each pot shows the portions left in the pot and warns when it is past its time. **Finish batch** records only what is really left in the pot as leftover; plates on unpaid tables stay counted from that pot when the tables pay, so they are never wasted or used twice. With no pot open, a plate is treated as cooked to order and uses its recipe.
- **Waste**: **Record waste** for anything thrown away (spoiled, past its date, burnt, dropped, sent back, wrong order, leftover) with how much. A stock item comes out of stock; a plate uses its recipe's ingredients; portions from a pot just leave the pot. Each record keeps its cost. Set **Waste a manager must approve** in Floor & kitchen setup: bigger waste recorded by the kitchen waits on the **Waste** tab (managers get a notification) and nothing leaves stock until it is approved. The **Report** tab shows what waste cost, as a share of sales, by reason, item and person, and how much of each batch was sold or wasted. Waste is a stock loss in the books; ingredients used for dishes are cost of sales.
- **Online orders** (Restaurant plan): your own link and QR code where customers order from your menu to collect or for delivery, and pay by M-Pesa or when they get it. Open it in **Online orders > Online menu & link**; **Put the whole menu online** adds every dish and drink (ingredients never show), or switch single items with **Sell online** in Menu. Sold-out items are greyed out and can't be ordered. A new order rings on Online orders (and phones); **Accept & send to the kitchen** puts it on the kitchen screen as a takeaway named after the order (WEB-00012 Jane). When the kitchen marks it ready, a collection order turns **Ready** on the customer's page; a delivery waits until you tap **Out for delivery** with the rider's name and phone, and the customer sees who is coming and can call them. The rider's link lets them say it was delivered and what they collected. **Customer has it** records one sale for the order (paid online, at the door or to the rider): it shows in Today, Bills and the reports and uses the dishes' ingredients like any bill. Online orders can't be paid or changed from the floor. Cancelling takes them off the kitchen screen (a paid order is refunded by M-Pesa first). Orders not accepted within 5 minutes show as an alert.
- **Self-service kiosk and buffet** (Restaurant Pro, Kiosk & buffet): a tablet or computer where guests order and pay by themselves. A manager taps **Kiosks > Add a kiosk** and gets an 8-letter code (it works once, for 15 minutes); on the kiosk device open BlueDuka, tap **Use this device as a self-service kiosk** and

type it. From then on that device only shows your menu (or buffet tickets): it never signs in as staff, can't open any staff screen, and starts again after each order or two minutes without a touch. Guests choose dishes (with their options) or buffet tickets (adults and children), then pay with an **M-Pesa prompt** on their phone or **at the counter**. Paid orders become one sale each and food goes to the kitchen as "Kiosk 042". Guests get their number and a QR ticket. Put **Collection screen** on a TV: it shows numbers being prepared and ready (with a sound). At the counter or the buffet door, **Orders > Ticket** scans the QR code (or type the number): food is handed over once it's ready, buffet guests are let in once, on the day they paid. Counter orders not paid within 30 minutes are cancelled. **Buffets** sets each buffet's adult and child price and the hours it's sold. To stop a kiosk, **Remove** it (it stops at once) or make a **New pairing code**. Staff can also hold the restaurant's name on the kiosk for 8 seconds to stop it.

- **Kiosk receipts**: connect a receipt printer (58 or 80 mm, network, USB or Bluetooth) to the kiosk: hold the restaurant's name for 8 seconds, choose **Set up the receipt printer**, find or type the printer, **Test** and **Save**. Each order then prints its receipt with the guest's number: **PAID** with the items, VAT, the M-Pesa payment and the QR ticket when paid by M-Pesa, or **PAY AT THE COUNTER** with the amount to pay. When a counter order is paid, the kiosk (if still on that order) and the counter's printer print the paid receipt.
- **What needs attention**: **Today** and **Owner view** start with alerts, each opening the place to deal with it: the kitchen running late, food standing ready, guests waiting on the QR menu, bills printed but not paid, waste or handovers to approve, batches past their time, shifts left open, running low, approvals and cash short today. Everyone sees only what they can act on. The most urgent also go to managers' phones as notifications (each one now and then, not over and over).
- **Owner view** (owners and managers): today, yesterday, 7 or 30 days or this month, for one branch or all of them: sales and money collected (against the period before), what is still to collect (open tables and tabs), guests, sales by day, how guests paid, best sellers, orders by status and type, items taken off after reaching the kitchen, cancelled orders, discounts and returns, an **estimated gross profit** (dishes at their recipe's cost, other items at their cost; it says how much of the sales had a known cost), cash counts of tills and waiters, waste, what is running low and, with several branches, each branch side by side. Every figure comes from the records. A manager given one branch sees only that branch.
- **Kitchen screen** (Restaurant plan): rounds appear by themselves with a sound, oldest first, with the table, the waiter and how long they have waited. A round nobody has started rings again every 20 seconds, and a flashing bar shows how many are waiting, until someone taps **Start preparing**. Each ticket has one big button for the next step: **Start preparing**, **All ready**, then **Served**; tap a single item to mark just that one ready. The screen stays on while it is open. **Test sound** checks the volume. In a browser, sound works once anyone has tapped the page since it was opened; after a reload a red bar asks for one tap. The BlueDuka app (Windows or Android), or the website installed as an app, always rings without a tap. On an Android tablet, set the screen timeout to the longest. Give kitchen staff the **Kitchen** role.
- **Ready to serve**: when the kitchen marks food ready, the waiter who took the order is told at once, on whatever screen they are: a sound, a message with a **Tables** button, a notification on their phone (and on Windows), and a **Ready to serve** list on the Tables screen, grouped by table. They tap **Served** when it is on the table. Waiters only see and serve their own tables; managers see all.
- **Sold out**: on the kitchen screen, **Sold out** lists every dish and drink with a switch. Switch off what has run out: waiters see it greyed out and can't add it, and guests see "Sold out" on the QR menu. Switch it back on when it is ready again. The kitchen team and managers can do this; each change is in the activity log.
- **QR menu** (Restaurant plan): **Floor & kitchen setup > QR codes (PDF)** downloads printable cards (four to a page, with your name, the table and a large QR code) to cut out and put on the tables; a single table's card is in that table's settings. Guests scan it with the phone camera, no app needed, and see your

menu with photos, descriptions and prices in your shop's currency (add them in Menu). They choose items, add a note and send the order, or tap **Call the waiter** or **Bring the bill**. A waiter accepts it on the Tables screen (and gets a notification) and it goes to the kitchen as a round. The guest's page then shows whether the order was confirmed, is being prepared, or is ready. Guests pay at the table as usual. A new code for a table (in its settings) stops the old card working.

- **Without internet** on the Windows till and the Android app: open tables, add and send rounds, print, take payment (cash, card, typed M-Pesa codes) and void within your own limit. Everything uploads by itself when the internet is back; a change the server can't accept (for example a table paid on another device) stays on the Tables screen with the reason. The QR menu, the kitchen screen and Sold out need internet.
- **Roles**: **Waiter** (own tables, own shift), **Cashier** (every table, moving, payment, part-payments), **Kitchen** (kitchen screen, batches and waste), Manager and owner (everything, including shifts, cash counts and approving waste). The owner can switch single permissions on or off as for shops.

Rooms, events and stays (Restaurant Pro)

For a restaurant with rooms, a guest house, a lodge or a small hotel. Open **Rooms, events & stays**. There is no limit on the number of rooms.

- **Setup** (owner and managers): add your **room types** with the price a night and how many people each sleeps (for example Single, Double, Family room), then each **room** with its number. A room type can be shown on the online booking page or kept for the front desk only. The picture button on a room type adds up to 8 **photos** that guests see on the online booking page.
- **Front desk**: today's arrivals, guests leaving, guests in the house and the next 7 days. **New reservation** takes the dates, room type, number of guests and the guest's name and phone; the room can be given now or at check-in. BlueDuka never lets a room type be booked beyond the rooms you have on any night, and never puts two guests in one room on the same night. Rooms marked out of order don't count.
- **Deposits**: take a deposit in cash, card or an M-Pesa code, or send an **M-Pesa prompt** to the guest's phone; it is recorded by itself when they pay. Deposits count in the till and the books straight away.
- **Check-in**: choose the room and, for the guest register, the ID or passport number and nationality. Only the front desk sees these. A room that hasn't been cleaned asks before letting the guest in.
- **Charging to the room**: on a restaurant or bar bill, **Charge to a room** puts it on the guest's account instead of taking payment (the cashier or receptionist does this). It shows on their stay and is paid at check-out.
- **Check-out**: the nights to charge (fewer if they leave early, more if they stayed on), less the deposit, plus what was charged to the room. One payment can cover everything; several payments work too. The room nights become one ordinary receipt, so eTIMS, reports and the books work as for any sale. The room is then marked **Needs cleaning**. A manager can leave an unpaid balance on the guest's account.
- **Cancelling**: a reservation can be cancelled, or marked **No-show** once the arrival day has come. A deposit already paid is kept as a cancellation fee (its own receipt); to give it back, refund that receipt from Bills.
- **Housekeeping**: every room with its status (clean, needs cleaning, out of order), whether a guest is in it, arriving or leaving today. Housekeepers see rooms only, never guests' names or money.
- **Calendar**: every room over two weeks. Tap a stay to open it, or an empty day to book that room.
- **Online booking page** (Setup > Online booking page): guests choose their dates, see which rooms are free with the price for their stay, and book. With a deposit set (for example 30%), an M-Pesa prompt asks for it and the room is held for 20 minutes while they pay; unpaid holds are released by themselves.

With no deposit, the room is simply reserved. Guests get a private link to see their booking, and can cancel it there until they have paid. M-Pesa must be connected for a deposit.

- **Booking sites** (Airbnb, Booking.com, Expedia, Vrbo...): in Setup, tap a room, then **Booking sites**. Copy the room's own calendar link into each site's "Import calendar", so the site closes the nights booked in BlueDuka (only dates are shared, never guests' names). Then paste each site's "Export calendar" (iCal) link into the room: every 30 minutes BlueDuka reads it, and each booking there becomes a reservation in that room, follows changed dates, and is cancelled if it is cancelled on the site. Such a reservation has no price (it was paid on the site): if the guest pays at the desk, a manager sets the price before check-out. Sites read calendars every few hours, so on busy days check new bookings; if a site booking lands on a room already taken, it is kept without a room and the desk is told to give it another.
- **Events and group bookings** (the **Events** tab): weddings, conferences, meetings, parties and tour groups.
  - Add your **halls and spaces** in Setup (a hall, a garden, a boardroom) with how many people they hold, a price an hour, a day or an event, and photos.
  - **New event** takes the name, dates, number of guests and the organiser. It starts as an enquiry.
  - **Book a space** for set hours (past midnight works too). A space is never given to two confirmed events at the same time; confirming an enquiry checks this.
  - **Meals, drinks and extras**: pick menu items (stock and reports see them) or add anything else with a price, for example "Lunch buffet" for 150 people, a PA system or decoration.
  - **Rooms for the group**: add rooms from the event. Choose who pays for them: the organiser on the event's bill, or each room at its own check-out.
  - Take deposits (or an M-Pesa prompt to the organiser), then **Close the bill**: one receipt with the spaces, meals and extras (and the rooms, when the organiser pays them), paid by the deposits first. What isn't paid stays on the organiser's account. Cancelling keeps any deposit as a fee, refunded from Bills if you choose.
  - The online page shows your halls and spaces with photos; guests send an **enquiry** (date, guests, spaces, rooms, meals) that arrives in Events for you to price and confirm.
- **Report** (owner and managers): occupancy, room revenue, the average price a night (ADR), revenue per available room (RevPAR), revenue by room type, what was charged to rooms, cancellations and no-shows.
- **Roles**: **Receptionist** (reservations, check-in and check-out, deposits, charging bills to rooms, events), **Housekeeper** (room status only), Manager and owner (also setup, prices and the report).

PART 13

Creative studios (design, web, social media, branding)

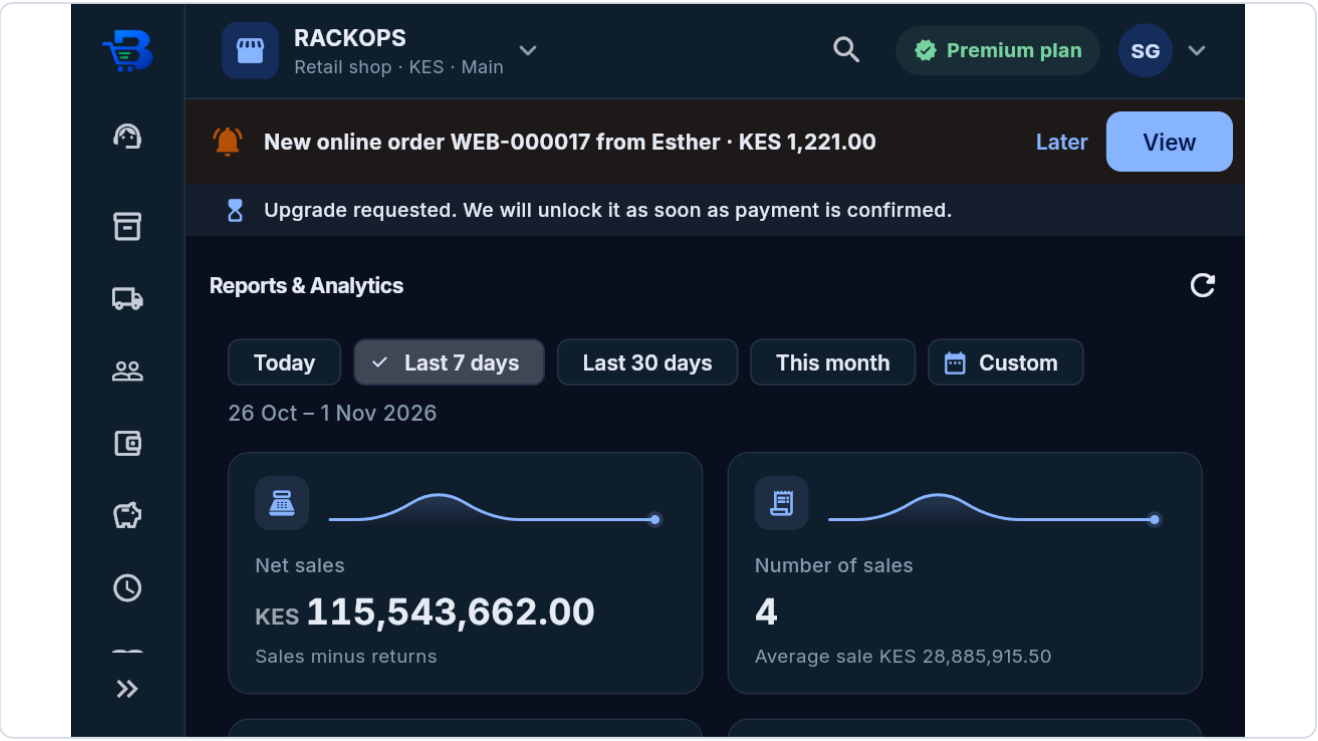
Graphic designers, web designers, social media marketers, branding studios, photographers and writers run on projects, not stock. Choose a creative kind when you set up (graphic design, web design and development, social media marketing, branding and identity, photography and video, content writing, printing and signage design, or other creative work) and the studio gets its own screens. Stock, tills, purchases, the online shop and branches are not shown. A studio account stays a studio: a shop or a restaurant needs its own account.

- **The plan**: one plan with everything, **KES 500 a month**, for you and 3 people. Each extra person is **KES 100 a month**. Every new studio gets 14 days free first, with no card, and can try a team of up to 10 people during that time. Pay by M-Pesa in Subscription & Billing, or a year for the price of 10 months.
- **Extra people**: when you pay, choose how many extra people to pay for (the app suggests the people already on your team). A team of you and 5 people is KES 500 + 2 × KES 100 = KES 700 a month. To add someone in the middle of a paid period, open Subscription & Billing, Your team, Add people: you pay only for the days left (2 people with 15 days left costs KES 100), and later payments carry them on. If you pay for fewer people than you have, the people added last are paused until you add seats; nothing they recorded is deleted.
- **If the plan ends**: every project, invoice and client stays and you can still see them; new work waits until the plan is paid.
- **Services & prices**: your usual services and prices are ready from the start, for the kind you chose (for example Logo design, Website design, Social media management). Change them or add your own.
- **New project** (Projects or the Dashboard): the client (an existing one, or a new name and phone), the project name, the brief, the deadline, who works on it, the revision rounds included, the deposit to start, and the price lines. Each line starts from one of your services; change its wording and price for this client.
- **Stages**: Brief, In progress, With client (for review), Changes, Delivered. The big button on a project moves it on: **Start work**, **Send for review**, **Mark delivered**. Moving from review to changes counts a revision round. The board shows every open project by stage; the Dashboard shows what is due this week and what is late.
- **Updates**: post what you did, with a link to the files (Google Drive, Figma, Dropbox, the test website). Switch off **Client can see it** to keep a note inside the studio. Internal notes, hours and costs never show to the client.
- **The client link**: **Send the client link** opens WhatsApp with a private link to the project. There the client sees the stage, the deadline, the brief, the work you shared, the quote, and the invoice with how to pay. They can **accept the quote**, **approve the work** or **ask for changes**, or send a message; you are told at once and it shows on the project and the Dashboard. From the project's menu you can switch the link off, or make a new link so the old one stops working.
- **Quote, invoice and payments**: **Send quote** sends the link with the quote. **Client accepted** records a yes given by phone. **Make invoice** makes the invoice from the price lines, with the deposit if one was paid; the rest is what the client owes. **Record payment** adds later payments; the client's balance, reminders and statements are in **Clients & payments**, and every invoice is in **Invoices & quotes**.
- **Time and costs**: log hours (everyone, for their own work) and costs (printing, stock photos, fonts, ads paid for the client) on each project. The owner sees what the project earned after costs.

- **Retainers**: monthly work such as social media management or website care. Choose the client, the amount and the day of the month (1 to 28): the invoice is made by itself on that day every month, and can be texted to the client. **Invoice now** makes the next one today; **Pause** stops it.
- **Team**: a **Designer** sees only the projects given to them, without prices or money, and can post updates, move the stage and log hours. A **Studio Manager** runs every project, the invoices, payments and retainers. Expenses, the accounting books and Hours & pay work as for a shop.

PART 14

Running a bigger business



Reports: profit, best sellers and staff, over any period

- **Business health** (Reports > Business health; owners and finance): revenue, gross profit, operating and net profit, margin and expenses against the period before; monthly revenue and gross profit against your **Targets**; quick and current ratios; best and slowest sellers; dead stock (not sold for 60 days) and stock turnover; customer retention; debtor ageing; a 30-day cash forecast; sales by employee and branch; expenses by category. "What needs attention" says what is happening, why it matters and what to do.
- **Leave, rota and reviews** (Time & pay; Business plan): staff ask for leave (Sundays not counted; annual leave checked against what is left, 21 days by default); HR approves. The rota plans shifts and can copy a week. Reviews score five areas and attach the person's sales, hours and leave; the person acknowledges them.
- **Buying** (Purchases, or Products > Ask to buy; Business plan): staff ask for goods; a buyer approves, or approves and orders. "Order all together" puts every branch's requests on one order to one supplier (central purchasing). Supplier price lists fill new orders; supplier performance scores on-time delivery, delivery in full, returns and price changes.
- **Sizes and colours, bundles, exchanges**: a product can have variants (each with its own price, barcode and stock); the till asks which. A bundle sells several products as one and takes its parts off the shelf. In a return, "Exchange for other goods" swaps items and works out what is paid or handed back.
- **Customer care** (Customers & Debts): groups and ready-made segments, campaigns by WhatsApp or SMS (customers who said no are never included), and a feedback and complaints log.
- **Appointments** (salons, barbers, spas): book a service with a staff member, check out at the till, and add each person's service commission to the pay sheet. **Time and billing** (consultants, lawyers, accountants): record hours per client and invoice them in one step.

- **Projects** (Business plan; switch on in Grow): tasks with owners and deadlines, materials from stock and other costs, progress updates with links, invoices, and profit and budget use per project and department.
- **Your companies** (Settings, owners; Premium or ERP Business): sell from one of your companies to another (an invoice in one, a delivery and supplier bill in the other) and see consolidated statements, with sales between your companies taken out.
- **Cash flow statement** (Accounting > Reports > Cash flow): money in and out by operating, investing and financing.

PART 15

Quick start by type of business

Every business starts with section 1 (settings, products, staff). These are the extra steps that matter for each kind of shop. Call or WhatsApp **+254 727 177 155** and we set it up with you for free.

Supermarkets and minimarts

1. Import products from Excel (**Inventory > Import products**) with barcodes, prices and buying costs.
2. Connect a USB or Bluetooth barcode scanner; it types into the till's search box. On phones, tap the camera button to scan.
3. Turn on **Till shifts** (Business plan) so each cashier opens and closes with a cash count.
4. Set **Low-stock levels** and use **Purchases > Reorder list** to order by supplier.
5. Connect your M-Pesa till (section 8) so payments confirm themselves.

Pharmacies and agrovets

1. On each medicine, switch on **Track batches and expiry dates**.
2. Record every delivery with its batch number and expiry date (**Purchases > Record a delivery**). The oldest batch sells first.
3. Check **Inventory > Expiring soon** every week; it suggests a clearance discount.
4. Agrovets: sell seeds and chemicals by the kilogram or litre, and give farmers credit accounts with limits.

Hardware shops

1. Set each product's unit: piece, kilogram, litre or metre (cement by the bag, wire by the metre).
2. Make **Quotations** for contractors (**Invoices & Quotes**); when they agree, turn it into a sale in one tap.
3. Give contractors credit accounts with limits (**Customers & Debts**) and send statements on WhatsApp.

Butcheries

1. Add each cut in **kilograms** with its price per kilo.
2. At the till, type the weight from your scale; the price works itself out.
3. Record deliveries by weight, and trimming or spoilage as **stock adjustments** with a reason.
4. Give hotels and schools credit accounts, and their M-Pesa payments come off what they owe.

Wines and spirits

1. Give every bottle a barcode and sell by scanning, so stock goes down as it sells.
2. Each attendant logs in with their own account; every sale and discount shows who did it.
3. Turn on **Till shifts** and **Approvals** for big discounts and price changes (Business plan).
4. Count stock weekly (**Inventory > Stock count**): the difference against what should be there is shown.

Boutiques, clothing and shoe shops

1. Add a product once, then **Variants** for each size and colour, each with its own barcode and stock.
2. At the till, pick the product, then the size and colour.
3. For a different size, open the sale and use **Return > Exchange for other goods**: only the difference is paid.
4. Share your **Online shop** link on Instagram and WhatsApp (Starter plan and above).

Phone, electronics and appliance shops

1. On each phone, laptop or TV, switch on **Track serial / IMEI numbers** and set the warranty in months.
2. Record each unit's serial when it arrives (**Serial numbers > Record units in**; scan each one).
3. At the till, choose the exact unit; its serial prints on the receipt.
4. **Inventory > Find serial** shows any unit's history and the warranty left.

Salons, barbers and spas

1. Sign up as **Salon, barber or spa**: **Appointments** is switched on.
2. Add each service (haircut, braids, massage) as a product with its price.
3. Book clients by stylist and time; walk-ins are sold at the till as usual.
4. Pay: in **Time & Pay**, open each person's pay settings. A stylist on a monthly salary: choose **Monthly salary **and set** Commission on services** to 0 (or a small rate on top). A stylist paid by commission only: choose **Commission only** and set their rate. Empty uses the rate on the Commissions screen.
5. At the end of the month, open **Appointments > Commission** and **Add to the pay sheet**: each person's commission goes onto the month's pay sheet once, at their own rate.
6. **Online booking**: Appointments > the globe button. Choose the services (with how long each takes), who customers can book, and your opening hours, then switch on **Take bookings online** and share the link (WhatsApp, Instagram bio, Google Business Profile). Customers see each person's free times, how busy you are right now and who is free next, then book with their name and phone. Nobody can be booked outside their rota shifts or on approved leave, or twice at the same time. Online bookings show in Appointments as "booked online" and the team gets a notification; the customer gets a private link to see or cancel their booking.

Consultants, agencies, contractors and accountants

1. Record hours per client and job in **Time and billing**, then bill them on one invoice.
2. On the Business plan, use **Projects** for tasks, materials and costs, stage invoices and profit per project.

Restaurants and cafés: see 9b. Creative studios: see 9c.

PART 16

Setting up the ERP, step by step

For companies on **General business ERP** (ERP Starter, Business or Enterprise). Work through it in this order; most companies are running within two weeks. We help for free: **+254 727 177 155**.

Week 1: the company and its money

1. **Staff, roles & branches**: add each branch and warehouse, then invite staff with their roles and branches. A branch manager sees only their branch's figures.
2. **Accounting & ledger**: check the chart of accounts, set VAT if you are registered, and connect M-Pesa and your bank for matching (section 8). Connect KRA eTIMS if you need it.
3. **Customer accounts**: import customers from Excel with what each one owes, and set credit limits.
4. **Procurement & payables**: add suppliers, then enter what you owe each of them.

Week 2: stock, buying and people

1. **Inventory & warehouses**: import products, then record opening stock in each warehouse. Use transfers to move stock between them.
2. **Procurement**: save each supplier's price list. Staff send **purchase requests**; a buyer approves them, and **Order all together** puts every branch's requests on one order.
3. **HR & payroll**: create an employee file for each person (pay, bank or M-Pesa, KRA PIN, NSSF and SHA numbers). Check the payroll rules (PAYE, NSSF, SHA, Housing Levy) with your accountant before the first payroll.
4. **Approvals**: choose what needs a manager's approval: big discounts, stock adjustments, large payments.

Every month

1. Run payroll in **HR & payroll**, check it, then send payslips and the remittance list.
2. Match M-Pesa and bank statements in **Finance office**.
3. Open **Reports & analytics**: profit and loss, balance sheet, cash flow, VAT summary, and **Business health** for what needs attention.
4. Give your accountant their own login (Accountant role): they see the books and reports, nothing else.

When you grow

- More branches or warehouses: **ERP Business** (10) or **ERP Enterprise** (no limit).
- Several companies under one owner: create each company, then **Settings > Your companies** to sell between them and see consolidated statements (ERP Business and above).
- A counter or factory shop: switch on **Point of sale** in the workspace home.

PART 17

Wholesale, distribution and manufacturing

Wholesale and distribution (the **Distribution desk**)

1. Add warehouses (**Warehouses**) and record opening stock in each.
2. Give customers accounts with credit limits (**Customer accounts**).
3. Take **bulk orders and invoices**; stock leaves the warehouse when the order is delivered.
4. Plan **Deliveries** with riders or drivers; cash collected on delivery is recorded against the order.
5. Reorder from **Suppliers & procurement** when stock runs low.

Manufacturing and production (the **Production floor**)

1. Add raw materials and finished goods (**Raw materials & finished goods**), each in the unit you buy or make it in, with buying costs. When adding each one, choose **What it is**: **For sale** (finished goods), **Raw material**, or **Supplies and packaging**. Only items for sale appear at the till, on invoices and quotations and in the online shop; raw materials and supplies are bought, counted and used in production but can never be sold by mistake. Filter Stock by **For sale**, **Raw materials** or **Supplies** to see each. Machinery and equipment are not stock: record them under **Assets**.
2. Make a **Bill of materials** for each product: what goes into one unit, plus labour and overheads.
3. **Production planning** shows what you can make with the materials you have.
4. Open a **Work order**: it takes the materials out of stock and, when finished, adds the products to stock.
5. Check quality in **Quality control** (see 9i): goods received, checks during a run and finished goods.
6. **Production costing** shows what each unit really cost.
7. Sell through **Customer orders & invoices**, or a factory shop with the point of sale.

To import raw materials or supplies from a file: **Stock > Import**, choose **Raw materials** (or **Supplies and machinery**) under **What is in this file?**, then choose the Excel or CSV file. No selling price is needed. To mix kinds in one file, add an **Item type** column (product, raw material or supply) and choose **The file says**.

PART 18

Finance and procurement controls (ERP)

Finance and procurement work as one system: every sale, delivery, bill, payment, expense and pay run already posts to the books, so finance never types in what another department recorded.

Roles. In **Staff, roles & branches**, give people a finance or procurement role: Finance Director, Finance Manager, Accounts Payable Officer, Accounts Receivable Officer, Treasury Officer, Procurement Manager, Procurement Officer, Storekeeper, Department Manager or Company Director. Each sees only what their job needs.

Approval limits. In **Approvals > rules** (or **Finance HQ > Controls > Approval limits**) switch on **Placing purchase orders**, **Paying suppliers** and **Recording expenses**, and set up to three limits:

1. **From**: at or above this amount one manager approves.
2. **Two approvers from**: two different people must approve.
3. **A director must approve from**: one of the two must have the director's "approve large amounts" right.

For example: from KES 5,000 one approver; from KES 5,000 to 50,000 two; above 50,000 a director as one of them. You, the owner, can always approve on your own. Nobody approves their own request.

Purchasing controls (**Finance HQ > Controls > Purchasing controls**):

- **Separate duties**: whoever prepared a purchase order can't receive it, and whoever received the goods can't check the supplier's invoice for them. On by default for ERP, wholesale and manufacturing.
- **Budgets**: **Warn** or **Stop it** when an order or expense goes over budget. Add a **Purchases** line to a budget to control spending on orders.
- **Quotations**: from a set amount, ask for a minimum number of quotations before an order is awarded.

From need to payment

1. A department asks for goods: **Buying > Requests > Ask for goods** (with the department and the reason).
2. Procurement approves it, or taps **Get quotations**: **Buying > Quotations** sends the same list to several suppliers by WhatsApp. Record each supplier's prices as they reply; BlueDuka marks the cheapest and the fastest and shows each supplier's delivery record.
3. **Award** a quotation and write why. This creates the purchase order at the quoted prices.
4. If the order is above your limit it shows **Awaiting approval**; it goes to the supplier once approved, or back to a draft if rejected.
5. The storekeeper **receives the goods**: quantities accepted go into stock; damaged, wrong or expired items are recorded as **rejected** with a reason and are not billed.
6. Finance opens the bill (**Purchases > Bills to pay**, tap the bill) and enters the supplier's invoice. BlueDuka matches it against the order and the delivery and shows any price or quantity difference. A difference is only accepted with a note.
7. Accounts payable **pays the supplier**. Above the payment limit it waits for approval, then is released.

Finance HQ shows the whole company for the period: revenue, gross and net profit, cash, bank and mobile money balances (with accounting on), what customers owe, what is owed to suppliers and when, orders waiting for approval or still to arrive, budgets, payroll not yet paid, stock value and what falls due in the next 30 days. Each card shows its figure, the change on the period before and a chart: income by product

category, expenses by kind, supplier balances, sales over time against the period before, and six months of income against costs. The shortcuts along the top open Accounting, Expenses, Purchases, Customers, Payroll, Stock, Budgets, Approvals and Reports. Pick a branch at the top to see that branch alone, or tap a branch in the Branches card to see its purchase orders, then any order to see its deliveries and bill. Businesses that are not ERP see the same dashboard under **Headquarters**.

Several companies. An owner of more than one company (Premium and ERP Business plans) can choose **Consolidated: all companies** at the top. The cards then add every company together (sales between your own companies are taken out), with income, profit and supplier balances by company and a table of the companies side by side. Tap a company to switch to it.

Buying > Insights points out possible duplicate orders, price rises, suppliers who charge more or deliver late, items bought most often and items several branches buy separately (order them together).

Approved and posted records are never deleted: a wrong delivery is corrected with a return to the supplier, a wrong bill with a cancellation or credit, a wrong journal with a reversal. The activity log shows who created, approved, rejected or changed each one, and when.

PART 19

Quality control (manufacturing and ERP)

Quality control covers everything from raw materials arriving to finished goods going out. Open **Quality control**.

1. Set standards (**Standards**, quality or production managers). For each product (or a whole category) and stage (**Goods received**, **During production**, **Finished goods**, **Stock on hand**) add the checklist: a **measurement** with its lowest and highest acceptable value (moisture up to 14%, weight 390 to 420 g), a **pass or fail** check, or a **note**. Mark a check **critical** if failing it fails the lot. Set how much to sample (a percent, with a minimum), how often to check during a run (every 30 minutes, say), whether the lot waits in **quarantine**, and whether a quality manager must release lots that pass.

2. Inspections open by themselves. A delivery of a product with a goods-received standard, or a finished run of a product with a finished-goods standard, opens an inspection linked to the supplier, purchase order, delivery or work order, batch and branch or warehouse. Quarantined stock still counts in stock but can't be sold, used in production, moved or transferred until it is decided. The **Overview** lists checks due during running work orders; tap **Check now**. To inspect stock on hand (a complaint, a doubtful batch) use **Inspections > Inspect stock**.

3. The inspector records results against the checklist. Measurements outside their range, a failed check or failed units in the sample fail the lot automatically, and a failed lot opens a **non-conformance report (NCR)**.

4. A quality manager decides (someone other than the inspector). The lot can be split:

- **Accept**: released for sale or use. Accepting a failed lot needs a note (a concession).
- **Rework**: stays in quarantine under a new inspection after the rework.
- **Return to the supplier**: a supplier return is made and credited against what you owe.
- **Dispose of**: written off as waste, with the value counted as a quality cost.

A lot that passes a standard that needs no release is released at once.

5. Non-conformance reports record what went wrong, the **root cause**, the **corrective action** and the **preventive action**, with a severity, due date and cost. A quality manager closes a report once the root cause and corrective action are recorded.

6. Trace a batch or production run: backward to the materials and the suppliers who delivered them, forward to the runs that used a material and the customers who bought the finished goods. Products tracked by batch (with expiry dates) are traced exactly: each run becomes a batch named after its work order. For other products the customers shown are those who bought the product at that branch between that run and the next.

7. Overview: pass rate, lots in quarantine and their value, what happened to inspected lots, the most common defects, supplier quality, production yield, the cost of poor quality and open reports.

Roles. Quality Inspector records results and raises reports. **Quality Manager** also releases or rejects lots, closes reports and sets standards. Managers have all of it; Production Managers can inspect and set standards but not release their own goods.

PART 20

Privacy and safety

- Staff only see the shops and branches they were given, and only do what their role allows. Only the owner and managers switch branches, change the shop's settings or approve; only accountants (and the owner and managers) see the books.
- A worker belongs to one shop. While on a shop's team they can't open their own shop, join another shop, switch shops or change the shop's settings. Once the owner removes them from the team, they are free to start their own shop or join another.
- Sales are never deleted or edited. Mistakes are corrected with returns, and important actions are kept in the **Activity log**.
- **Removing someone from the team** logs them out at once and closes their login. Nothing they recorded is deleted: their sales, shifts and payments stay in your books, and **Team & Roles > Former staff** shows how each of them did.
- Never share your password. If a phone or computer is lost, the owner removes the person or the computer.
- **If the owner dies or can no longer act** (Settings > **Business continuity**): the company must never be locked away with one person's password.
  1. The owner names up to three **successors** from the team and a waiting period (7 to 60 days, 14 by default). Each successor is emailed that they were named.
  2. If the owner dies, becomes unable to act, or can't be reached and the business is stuck, a successor opens **Business continuity** and files a claim: the reason, what happened, and a document reference (a death certificate number, a medical or court document).
  3. The owner and the other successors are emailed at once. A living owner taps **I'm here, stop this** and nothing changes.
  4. BlueDuka checks the documents with the successor and verifies or rejects the claim. Nothing moves without it.
  5. When the waiting period is over, the successor taps **Take over the company** and confirms with their own password. Ownership moves; the business stays exactly as it was (records, M-Pesa and bank set-up, subscription). If the owner died, their login is closed, they are signed out everywhere and the API keys they made stop working. Everyone who should know is emailed, and every step is in the **Activity log**.
  6. Nobody ever needs the owner's password. With no successor named, the family or partners contact BlueDuka support with the documents; ownership can then go to an existing member of the team after checks.
  7. A living owner can also hand the company over (retiring, selling, a new CEO): **Business continuity > Hand over**, choose the person and confirm with the owner's password.
- **Two-step login** (Settings > Your account > Two-step login): after your password, a 6-digit code from an authenticator app (Google Authenticator, Microsoft Authenticator, Authy; recommended) or from your email.
  - Setting it up gives you 10 backup codes. Keep them away from your phone; each one logs you in once if you lose the phone or can't get the email. Make new ones there at any time.
  - It applies to Google sign-in too. Changing your password ends any login that is waiting for its code.
  - **Required for owners of a business system** (ERP or manufacturing): after 7 days, the business opens only once it is on, and it can't be switched off (you can switch between the app and email).

- **Daily summary email** (owner, Settings): each evening at the hour you choose, today's sales, money in by method, expenses, profit, what customers owe and what is running low, to your confirmed email address.