

Marshal Business Suite

Point of sale & back office

GETTING STARTED GUIDE

Set up your shop, step by step.

15 steps, in the order a new shop needs them. Each one names the screen to open and what to do there.

What you will do

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02	Check your company details	Settings > General > Organisation
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Before you start

Have your logo, your price list, and - if you are VAT-registered - the device ID and activation key RSL issued for each shop.

1

Sign in and set your password

The welcome email

Your account is the key to everything below. The first person in becomes the administrator.

1. Open the welcome email from Marshal Business Suite and choose "Set your password".
2. Pick a password of at least 8 characters that you do not use anywhere else.
3. Sign in at <https://business.marshal.co.ls> and bookmark it on every computer and till you will use.

Tip: Turn on two-step sign-in under My Account. Anyone with your password then still needs your phone.

2

Check your company details

Settings > General > Organisation · <https://business.marshal.co.ls/settings/general/organization>

Your name, address and logo print on every receipt and invoice.

1. Check the business name and physical address.
2. Upload your logo.
3. Set the time zone to Africa/Maseru, so receipts and reports show your own time.

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Set up your shops

Settings > Stores · <https://business.marshal.co.ls/settings/stores>

Each shop keeps its own stock, tills, cash and fiscal device.

1. Open your first shop and check its name, address and contact number.

Tip: Switch between shops with the shop picker at the top of every screen; most settings apply to the shop that is selected.

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Register each shop's fiscal device with RSL

Settings > Fiscal & RSL > Device enrolment · <https://business.marshal.co.ls/settings/fiscal/enrolment>

Every receipt is signed on the shop's own device and filed with Revenue Services Lesotho (Lekuka).

1. Have the device ID, activation key and serial number RSL issued for this shop.
2. Enter them and choose Enrol. Marshal creates the device's keys and downloads your tax table.
3. Open Tax configuration and check the taxes listed are yours (e.g. 15% VAT on goods and services).

Tip: Each shop needs its own device. Repeat this step with the shop picker set to each shop in turn.

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Choose how customers can pay

Settings > Payments · <https://business.marshal.co.ls/settings/payments>

Each payment is recorded against the right method, and filed with RSL as that kind of money.

1. Switch on the methods you accept: cash, card, M-Pesa, EcoCash, bank transfer.
2. Under Payment destinations, say where each method's money lands (which bank account or mobile wallet).

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Create your product categories

Inventory > Categories · <https://business.marshal.co.ls/inventory/categories>

Categories group products on the till and in your reports.

1. Add the groups you think in - for example Groceries, Dairy, Household, Hardware.

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Add your products

Inventory > Products > Add product · <https://business.marshal.co.ls/inventory/products/new>

What the till sells and what RSL is told about each line.

1. Enter the name, category, selling price and barcode (scan it straight into the field).
2. Choose the tax: standard VAT, zero-rated or exempt - this decides what each receipt files with RSL.
3. Mark services as services, so they never count as stock.

Tip: Start with your fifty best sellers and add the rest over the first week.

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Put stock on the shelves

Inventory · <https://business.marshal.co.ls/inventory>

Stock goes down with every sale, so the counts need a starting point.

1. Enter the quantity you have on hand of each product, shop by shop.
2. If you run a warehouse, receive stock there and send it to shops with a requisition (Requisitions).

Tip: Do a stock take after the first month (Inventory > Stock Taking) to catch anything missed.

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Add your team

Settings > Users & Roles · <https://business.marshal.co.ls/settings/users>

Everyone signs in as themselves, so every sale, refund and cash drop has a name on it.

1. Add each cashier and supervisor with their email address.
2. Give them a role: Sales Personnel for cashiers, Supervisor for shift leaders, Admin for owners.
3. Choose which shops each person works in.

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Set your cash rules

Settings > Cash Management · <https://business.marshal.co.ls/settings/cash-management>

Decide how much cash a till may hold and who approves a shortfall.

1. Set the opening float for each till.
2. Set the most cash a till may hold before a drop to the safe.

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Receipts and printing

Settings > Receipt Preview, Settings > Printing · <https://business.marshal.co.ls/settings/receipt-preview>

What customers take home, and receipts that print without a click.

1. Check the receipt layout and add your footer message.
2. Follow Printing to set each till's receipt printer to print silently.

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End-of-day reports

Settings > End-of-Day Reports · <https://business.marshal.co.ls/settings/eod-reports>

Each shop's day, summarised and emailed to you.

1. Choose who receives each shop's report and at what time.

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Invoicing

Invoicing · <https://business.marshal.co.ls/invoicing>

Tax invoices for business customers, cleared with RSL when you issue them.

1. Add the services you bill under Billable items.
2. Raise an invoice for a customer and choose Issue to clear it with RSL.

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Open the day and make your first sale

Sales · <https://business.marshall.co.ls/sales>

The proof that everything above is in place.

1. Open the fiscal day (Settings > Fiscal & RSL > Fiscal day) - once a day, before the first sale.
2. Open the till with its float when Marshal asks.
3. Scan or pick a product, take the payment and print the receipt.
4. Check the receipt carries the QR code and verification code from RSL.

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Close the day

Cash Management · <https://business.marshall.co.ls/cash-management>

Count the cash, settle every till and send the day to RSL.

1. Close each till: count the drawer and explain any difference.
2. Accept the day's cash drops into the safe.
3. Close the fiscal day, which sends the day's totals to RSL.

Tip: The end-of-day report arrives in your inbox at the time you set in step 12.

Stuck on a step?

We're happy to help, or to walk you through it in a short call. 58070848 · billing@headway.co.ls