

POS PILOT — Help & User Guide

Welcome to **POS PILOT**, the shop point-of-sale for sales, products, stock, customers, pricing, shifts, reports, and (on **Pro**) commercial documents.

This guide explains how to **install** the program and how to **use it day to day**.
Default language is Portuguese; English is available from the first screen.

After installation you will also find this help under:

- **Start Menu** → **POS PILOT** → **Help (English)** (PDF), and
- `C:\Program Files\POS PILOT\docs\` (Markdown and PDF, when installed).

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1. Editions and license

POS PILOT has **two editions** only:

Edition	Includes
Standard	Core POS: sell, products, stock, customers, shifts, reports, Pricing (price lists and promotions), and margin / promotion reports. No Documents menu.
Pro	Everything in Standard, plus Documents (invoices, cash sales, quotes, proformas, receipts, delivery / return / credit / debit notes, convert documents, receive payment, branded A4/A5 PDFs with layout themes, filters).

Trial

After first installation you get a **3-day trial** that runs as full **Pro**, so you can evaluate everything including Documents.

After trial or when the license expires

Selling is blocked until an administrator activates a valid license key. You can still browse the catalog, settings, and other screens.

Activate a license

1. Open **Settings** → **License**.
2. Copy the **Install ID** and send it to your supplier (or call **+258 84 371 9711**).
3. Ask for a **Standard** or **Pro** key.
4. Paste the key and click **Activate**.

The key is tied to that computer's Install ID. A new PC needs a new key.

2. Install

What you need

- A **64-bit Windows 10 or Windows 11** computer for the shop counter
- The installer: `POS_PILOT_Setup_....exe` (or `POSPilotSetup.exe` from the website), provided by your supplier
- **MySQL** or **MariaDB** ready for the shop (often set up by your IT person). The installer does **not** install the database for you

Supported systems

System	Support
Windows 10 (64-bit)	Supported
Windows 11 (64-bit)	Supported
Windows 8.1 / 8 / 7 or 32-bit	Not supported
macOS / Linux	Not supported with this installer

Recommended PC

Item	Recommendation
Memory (RAM)	4 GB minimum; 8 GB if MySQL runs on the same PC
Disk	About 500 MB for the program, plus space for shop data
Display	1280×800 or larger; optional second screen for the customer display (F9)

Optional shop hardware

Device	Notes
Receipt printer	Common widths 58 / 76 / 80 mm (Windows printer)
Cash drawer	Usually opens through the receipt printer (cash payments or F8)
Customer display	Second monitor; open/refresh with F9
Barcode scanner	USB scanners that type like a keyboard work on the Sell screen

Steps

1. Double-click the setup EXE.
2. Choose installer language if asked (**English** or **Portuguese**).
3. Follow the wizard. Admin rights are required.

- Optional: create a desktop icon. A **Start Menu** shortcut is always created.
- Open **POS PILOT** from the Start Menu or Desktop.

What is installed

Item	Where
Program	C:\Program Files\POS PILOT\
Help (Markdown and PDF, EN and PT)	C:\Program Files\POS PILOT\docs\
Start Menu	App, Help (English), Ajuda (Português), Uninstall
Shop files (connection, exports, images, language packs, license)	%LOCALAPPDATA%\POS PILOT\data\ (kept when you update)

3. First start — database

- On the login screen, open **Configure database....**
- Enter host (often `localhost`), port (usually `3306`), user, password, and database name.
- Click **Test connection**.
- On a brand-new shop, you can enable **Create initial data** for sample products and demo users.
- Click **Save & connect**.

If you are not sure about these fields, ask the person who set up the server.

4. Sign in

- Choose language on the login screen if needed.
- Enter your **user** and **PIN**.
- Sign in.

Demo accounts

When the install is **not licensed** (including during the trial), the login screen shows demo credentials:

User	PIN	Role
admin	1234	Administrator
gerente	1111	Manager
caixa	0000	Cashier

Important: change these PINs in a real shop. Built-in accounts cannot be deleted, but you can change their PIN and details.

The login screen also shows **Assistance: +258 84 371 9711**.

Use **Logout** in the top bar to leave.

5. Who can do what

Task	Cashier	Manager	Administrator
Dashboard and customers	Yes	Yes	Yes
Sell and shifts	Yes	Yes	Yes
Products, stock, import/export		Yes	Yes

Task	Cashier	Manager	Administrator
Pricing		Yes	Yes
Documents (<i>Pro</i>)		Yes	Yes
Reports		Yes	Yes
Settings and user accounts			Yes
Discounts (within your limit)	Yes	Yes	Yes

On the Sell screen, sensitive actions (**Take money**, **Return / Void**, and some discount or tax edits) ask for a **supervisor PIN only if the signed-in user is a cashier**. Managers and administrators are not re-prompted. Voiding an entire sale still requires manager or admin rights.

Cashiers usually land on **Sell**; others on **Dashboard**.

6. Menus

Menu	Purpose
Dashboard	Today's overview
Sell	Cash register
Products	Catalog and categories
Stock	Quantities, warehouses, movements, expiring items
Customers	Customer list and history
Pricing	Price lists and promotions (<i>Standard and Pro</i>)
Documents	Formal commercial documents (<i>Pro only</i>)
Shifts	Open and close the till
Reports	Sales, margin, promotions, inventory exceptions
Data	Import / export files
Settings	Shop, printer, sync, license, and more
Users	Staff accounts

Switching pages may show a short **Loading...** indicator.

On **Standard**, **Documents** is hidden. During the 3-day Pro trial, Documents is available for evaluation.

7. Dashboard

Shows for **today**:

- Total sales and number of sales
- Average ticket
- Low-stock alerts
- **Expiring items** (expired or within each product's warn days)
- Sales by payment method
- Whether a shift is open
- Shortcuts and export of today's summary (CSV / Excel when available)

8. Sell (point of sale)

You must have an **open shift** before selling. Open one under **Shifts** if needed.

If the trial or license has expired, selling is blocked until **Settings** → **License** has a valid key.

Find products

- Type a name, SKU or barcode — suggestions appear.
- Tap a product tile or scan a barcode.
- Use category chips (**All**, a category, or **Uncategorized**).

Expiry at the counter

If a product has an expiry date, you may see a warning. Depending on **Settings** → **Expired products at sale**, the system either **warns and allows** the sale or **blocks** expired items.

Cart

- Change quantity or remove a line.
- Line discount with % (percent and/or amount).
- Order discount in the totals section. Discount % is limited by role (Settings).
- **Clear cart** with the button or **Ctrl+Del**.

If stock is too low and negative stock is not allowed, the sale is blocked until quantities are corrected.

Customer

Search by name, phone or email. Default walk-in customer is **POS CUSTOMER**.

If the customer has a **price list**, cart prices follow that list.

Hold a sale

- **Hold** saves the current cart.
- **Saved sales** restores it later (replaces what is currently in the cart).

Pay

Button	Shortcut	Meaning
Cash Sale	F12	Pay the full total in cash
Payment	F11	Split payment (cash, card, M-Pesa, E-Mola, and others from Settings)

In **Payment**: choose a method, enter the amount, add more methods until covered, then confirm. Change is calculated automatically. Receipts and the cash drawer follow Settings.

Returns and void — F5

After unlock (cashier needs supervisor):

1. Find the sale by number or from the recent list.
2. Set how many to return on each line.
3. Optionally restock.
4. Confirm.

Void sale (manager/admin) cancels the whole sale; enter a reason.

On **Pro**, from **Returns (F5)** you can also **Issue cash sale** on a completed POS sale to create a formal A4/A5 cash-sale document (stock was already deducted at the till).

Take money — F7

With an open shift: enter amount and reason. Recorded on the shift as cash taken out.

Shortcuts

Key	Action
F5	Returns / void
F6	Reprint a recent receipt
F7	Take money from the till
F8	Open cash drawer
F9	Open / refresh customer display
F11	Split payment
F12	Cash sale
Ctrl+Del	Clear cart

9. Products

(Managers and administrators)

- Search and filter by category.
- **New** or **Edit**: name, SKU, barcode, category, sell and cost price, tax, track stock, optional photo.
- **Expiry date** and **Warn days before expiry**.
- Status badges such as **Expired** / **Expiring soon**.
- Manage **categories**. Export the catalog from here or from **Data**.

Clearing the whole catalog removes all products and categories — use only if you are sure.

10. Stock and warehouses

(Managers and administrators)

Stock views

Tabs typically include:

- **On hand** — quantities at the selected warehouse
- **Low stock** — at or below reorder level
- **Expiring** — expired or within warn window
- **Movements** — sales, returns, receives, adjustments

Also: **Receive** stock, **Adjust** with a reason, **valuation**, and export (CSV / Excel).

Warehouses (locations)

You can work with more than one stock location:

- Filter stock by **All** or one warehouse.
- Manage warehouses under **Stock** and **Settings** → **Warehouses**.
- Sales use the **default warehouse** for the session.

11. Customers

- Search, create and edit customers.

- Assign a **price list** (Pricing) so Sell uses special prices.
- Address, phone and **NUIT / VAT number** appear on Pro document PDFs (bill-to block).
- View purchase history and export the list.

12. Pricing

(Standard and Pro — managers and administrators)

Price lists

Create named lists and set per-product prices. Assign a list to a customer; Sell uses those prices automatically.

Promotions

Create promotions with a start and end date:

Type	Meaning
% off	Percent discount
Fixed price	Sell at a set price
Buy X get Y	Quantity promotion

Scope can be shop-wide, a category, or a product. Promotions apply after price-list resolution.

13. Documents (Pro)

(Managers and administrators — Pro edition or trial)

Document types

Invoice, cash sale, quote, proforma, receipt, delivery note, return note, credit note, debit note.

Typical flow

1. Choose type and customer.
2. Add lines (search products).
3. Save as draft, then **post**.
4. Export or print the PDF: **Print A4**, **Print A5**, or **Save PDF** (default size in **Settings** → **Documents**).

What the PDF looks like

Commercial PDFs are invoice-style documents branded with your shop:

- **Company logo** and shop details from **Settings** → **Shop profile**
- **Bill to** customer: name, bold **NUIT**, contacts (phone), address
- Document number, dates — **due date** is always shown on invoices, quotes and proformas (a dash if empty)
- Line items table and totals
- **Amount in words** (written total in the document language)
- **Digital signature** block below the totals (your signature image, or a blank line to sign by hand)
- On the **last page only**: optional **footer banner** image, then **footer text**, then the page number

Layout and language are chosen under **Settings** → **Shop profile** → **Commercial document PDFs** (see [§18](#)).

Convert documents

From	Can convert to
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From	Can convert to
Quote	Invoice, proforma, delivery note
Proforma	Invoice, delivery note
Invoice	Delivery note

From a posted invoice you can also create **credit / return / debit** notes and **Receive payment** (creates a receipt). Use debtors / outstanding lists to follow unpaid invoices.

Filters

On the Documents list: search, type, status (draft / posted / void), payment status, customer, and date range.

Documents settings

Settings → **Documents**: default A4/A5; per type whether to deduct stock and whether an open shift is required.

Settings → **Shop profile** also controls logo, footer text, footer banner, digital signature, PDF layout theme and document language (details in [§18](#)).

14. Shifts

1. **Open** a shift with the opening cash float.
2. Sell during the shift.
3. **Close**: enter counted cash; the system shows expected cash and the difference.

Held sales at close

If there are **held / saved sales**, a **handover checklist** appears. Closing is not blocked, but you must **acknowledge** the checklist before Confirm. A note is stored on the shift for the next cashier.

You can print the close report on the POS printer, as A4 PDF, both, or skip. Use history and date range to reprint or export past shifts.

15. Reports

(Managers and administrators)

- Sales by day, product, category, cashier, shift
- Tax
- **Margin by product** and **promotion usage** (*Standard and Pro*)
- **Inventory exceptions** (expired, near-expiry, out of stock, negative)
- Export to CSV / Excel / PDF when available

16. Import and export data

(Managers and administrators)

Use **Data** for CSV / Excel / PDF import and export, and download templates. Files are stored under `%LOCALAPPDATA%\POS PILOT\data\`.

17. Users

(Administrators only)

Create and edit staff: username, PIN, role, active flag. You cannot delete built-in demo accounts or your own account while signed in.

18. Settings

(Administrators)

Typical sections:

Section	What it controls
Shop profile	Name, address, NUIT, logo, footer, signature, commercial PDF look — see below
Language	Interface language; reload packs; import ZIP
Appearance	Light / dark / system; colour palettes
Warehouses	Stock locations and default
Taxes	Named tax codes, default tax, tax-inclusive prices
Stock / expiry	Allow negative stock; expired products at sale (warn or block)
Discount limits	Max % by role
POS printer	Receipt printer and drawer
Customer display	Second screen / COM display
Payment methods	Cash, card, M-Pesa, E-Mola, custom
Currencies	Base currency (default MZN / MT)
Sync	Standalone or Terminal mode — see §19
License	Status, Install ID, activate key — see §1
Documents (Pro)	Default PDF size; stock / shift rules per type

Shop profile and commercial PDFs

Under **Settings** → **Shop profile**:

Setting	Effect
Shop name, address, phone, NUIT	Shown on receipts and document PDFs
Company logo	Appears in the PDF header (theme-dependent placement)
Footer text	Shown on thermal receipts and at the bottom of commercial PDFs
Footer banner	Optional image on the last page of commercial PDFs (above footer text)
Digital signature	Image below totals on commercial PDFs; if empty, a blank sign line is left
PDF layout	Visual theme for all commercial document exports (Pro)
Document language	Labels on the PDF: same as the app, or force English / Portuguese

PDF layout themes (Pro):

Theme	Look
Pilot (default)	Logo and shop on the left; document title and meta on the right; navy table
Ledger	Centered title; From Bill to columns; classic dates strip above items
Air	Document info top-left; company top-right; striped item rows

Theme	Look
Open	Title row, then company and parties columns; open table style
Band	Strong title rules; company and bill-to side by side; hairline table

Change the theme once; every new **Save PDF** / print uses it. Amount in words follows the document language.

Back up your MySQL/MariaDB database regularly (outside the app).

19. Sync (several tills)

Use this when more than one computer (or a tablet) should share the same shop data over the local network.

On the main PC (database / host)

1. Keep MySQL on this PC (or reachable from it).
2. Open **Settings** → **Sync**.
3. Enable the **sync server** (default port **8765**).
4. Allow that port through the Windows firewall if other devices cannot connect.

On a second till (Terminal)

1. Set mode to **Terminal**.
2. Enter the host URL, for example `http://192.168.1.10:8765`.
3. Enter a device name.
4. **Pair** with an admin or manager PIN.
5. Use **Sync now** when needed. Check last sync time, pending items, and errors on the same screen.

Standalone mode means this PC works alone with its own database connection and does not act as a network terminal.

20. Printer, drawer and customer screen

Configure under **Settings**. You can still sell if a device fails — fix printing later.

Device	How it is used
Receipt printer	Automatic receipts and reprints (F6)
Cash drawer	Opens on cash payments and with F8
Customer display	Open or refresh with F9

21. Change or add a language

- Built-in: **Portuguese (pt)** default and **English (en)**.
- Switch on the login screen, top bar, or **Settings** → **Language**.
- Import a language ZIP or place a pack under the data `locales` folder, then reload.
- You can fix a separate **receipt language** if needed.

22. Uninstall

Use **Windows Settings** → **Apps** or **Start Menu** → **POS PILOT** → **Uninstall**.

Shop data under `%LOCALAPPDATA%\POS PILOT\` may remain; remove it only if you no longer need the shop files. Your MySQL

database is separate and is not removed by the uninstaller.

23. Common problems

Problem	What to try
Cannot sell	Open a shift ; check License (trial ended?); call +258 84 371 9711
"No permission"	Sign in with the correct role, or ask an administrator
Documents menu missing	You are on Standard (or need Pro); activate a Pro key or use the trial
Product expired blocked	Change Settings → Expired products at sale , or update the product expiry
Printer / drawer / display	Check Windows printer, cables, and Settings; selling can continue without them
Database connection failed	Verify host, port, user, password, and that MySQL is running
Another copy already open	Close the other window, or ask support about forced start
Terminal cannot sync	Check host IP, port 8765 , firewall, and Pair again
Need a new license after PC change	Send the new Install ID from Settings → License

POS PILOT — User Guide. For license generation (suppliers only), see the separate licensing guide.