



ORYX Business

USER GUIDE

Everything behind your business, in one place.

How to use every page of ORYX Business: quotes and invoices, customers, stock, point of sale, bookings, payroll, bills, bank statements, VAT, the accountant's area, reports — and Mienx, your assistant.

Welcome

ORYX Business runs the money side of your business in one place — from the first quote to the VAT return. This guide walks you through every page, with step-by-step "How to" boxes for the jobs you do most.

How to use this guide

- **New here?** Read chapter 1 (Getting started) and chapter 2 (the Dashboard) first — 15 minutes.
- **Looking for one job?** Use the contents on the next page; every chapter has numbered **How to** boxes.
- Words in **bold** are the exact names of buttons, tabs and menu items on screen.
- Menu paths are written like **Sales** → **Quotes & invoices**: the group in the menu, then the page.
- What you see depends on your plan and on your role: if a page in this guide is missing from your menu, ask the owner of your account, or see **Settings**.

The boxes in this guide

TIP

A quicker way, or a habit that saves time.

GOOD TO KNOW

How something works behind the scenes, so there are no surprises.

CAREFUL

Something that is hard to undo.



Stuck? Ask Mienx. Tap her picture at the bottom right of any page and ask in English or Afrikaans — "who owes me money?", "make a quote for...", "how do I...?". Or open **Help & support** (the ? at the top) to ask our team.

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Getting started

This chapter takes you from creating your ORYX Business account to finding your way around the screen. Read it first if you are new, whether you are the owner setting things up or a staff member who has just been given access.

Organisations and businesses

Two words come up throughout ORYX Business, and they mean different things:

Term	What it is
Organisation	Your account. It has the plan you pay for, the people (users) who may sign in, and the settings that apply to everyone. Its name and plan show at the bottom of the menu.
Business (also called a book or entity)	One set of books inside the organisation: its own bank accounts, quotes, invoices, expenses and reports. An organisation can hold several businesses, and also Personal books for household money. How many businesses you can have depends on your plan.

For example, if you run a plumbing business and a small rental property, you would have one organisation with two businesses. Your bookkeeper might have access to both, while a sales person only sees the plumbing business.

Creating an account

Anyone can start free. The **Free** plan has every module, with small monthly limits, and no time limit. No bank card is needed. You can also start with a paid plan and try it free for 14 days.

Create your ORYX Business account

Quotes, invoices, stock, the till, payroll, VAT and your books — for South African businesses. Start free, no card needed.

Company name	Your name
<input type="text"/>	<input type="text"/>
Work email	Password (10+ characters)
<input type="text"/>	<input type="password"/>
Referral code (optional, from your adviser)	Country
<input type="text"/>	South Africa - ZAR - VAT 15%

☐ I agree to the [Terms of Service and Privacy Policy](#).

☐ Send me occasional product news. You can unsubscribe at any time.

Create my account

Questions first? [Talk to us](#)

Your plan

☒ Free	Free
☐ Starter	R 99 / month
☐ Business	R 599 / month
☐ Plus	R 999 / month

Free

Every module to try for as long as you like, with small monthly limits. No card needed.

- ✓ Every module — try it all
- ✓ 4 invoices and 4 quotes a month
- ✓ 2 customers, 4 products
- ✓ Payroll: calculate and preview (drafts)
- ✓ 1 user

 Free for as long as you like. No card needed. Upgrade any time — your data stays and the limits lift at once.

 Your books are private to your organisation. Only people you invite can see them.

 No card needed for the trial, and you can switch plans while you try ORYX Business.

 Help from a real team: [contact support](#)

The sign-up page: your details on the left, your plan on the right.

How to: create your ORYX Business account

- 1 On the website, click **Start free** (or use a sign-up link from your adviser).
- 2 Fill in **Company name**, **Your name**, **Work email** and a **Password** of at least 10 characters. If an adviser gave you a code, type it in **Referral code**.
- 3 On the right, under **Your plan**, **Free** is chosen for you. To try a paid plan instead, click it: the summary below lists what it includes and how many users it allows, and it is free for the first 14 days.
- 4 Tick **I agree to the Terms of Service and Privacy Policy**. Tick the product news box only if you want occasional news.
- 5 Click **Create my account**. We email you a 6-digit code.
- 6 On the **Check your email** page, type or paste the code. Your account opens as soon as all six digits are in (or click **Open my account**).

GOOD TO KNOW

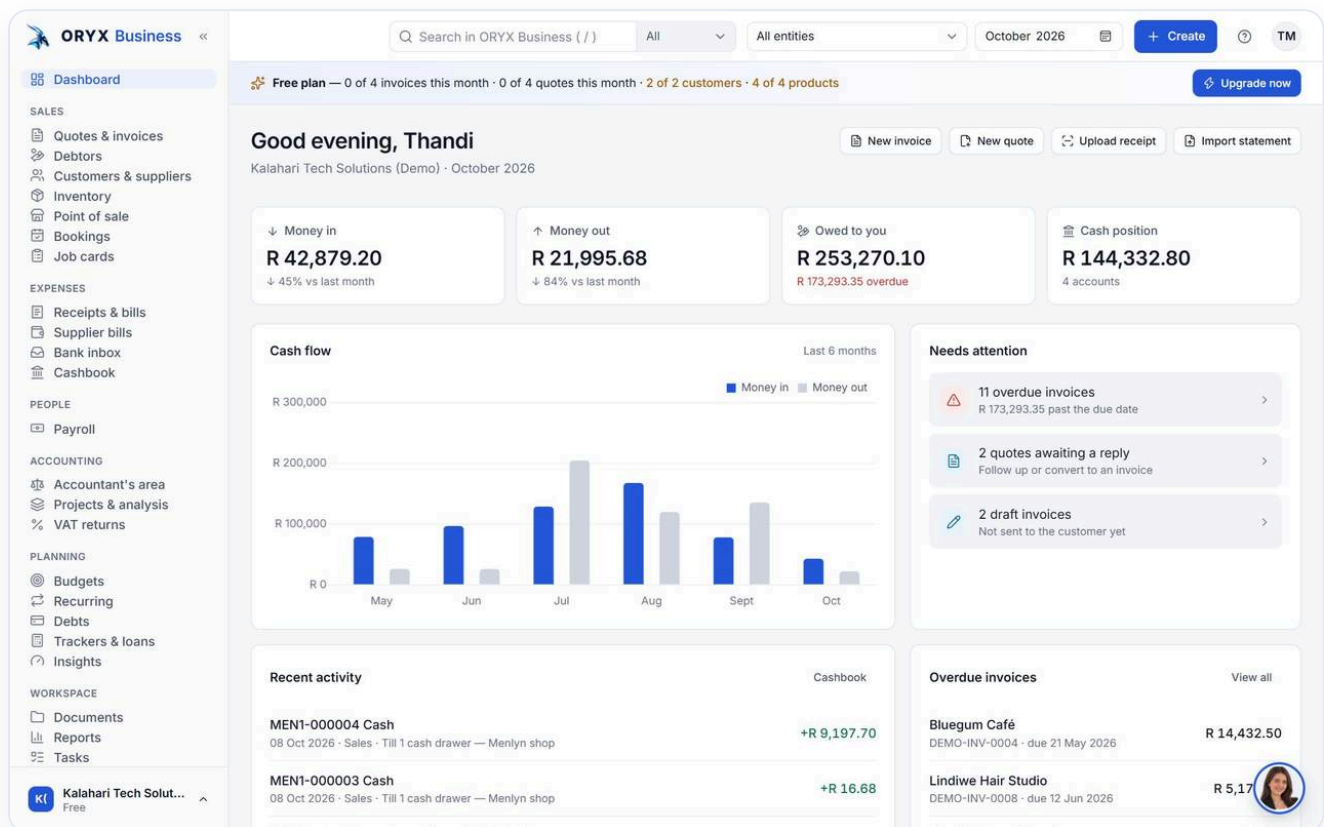
No email after a minute? Check your spam folder. If you typed the wrong address, click **Start again**. The country is fixed to South Africa, rand (ZAR) and 15% VAT.

If an adviser set up the account for you, the link in their email opens the sign-up page with your details already filled in. You only choose a password, accept the terms and click **Open my account**, without a code.

Your organisation profile

The first time you sign in after signing up, ORYX Business asks you to **Set up your organisation profile**: your logo, organisation name, industry, province, address and contact details, VAT number, company registration number, financial year end and whether you give discounts. These details print on your quotes and invoices, so a minute now saves typing later. Click **Get started** → to save, or **Skip for now** and finish it later under **Settings** → **Organisation profile**. Either way you land on **Quotes & invoices**, ready for your first document.

On the **Free** plan, a bar above every page shows what you have used this month (for example "1 of 4 invoices this month") with an **Upgrade now** button. When you reach a limit, ORYX Business tells you and offers the plans; nothing you already have is lost. On a trial of a paid plan, the bar shows how many days are left.



On the Free plan: what you've used this month, and Upgrade now.

GOOD TO KNOW

Monthly limits (invoices, quotes, receipts and bills, bank statement imports, job cards, till sales and questions to Mienx) start again on the 1st. Customers, products and employees count what you create: deleting one does not free a place. On the Free plan pay runs stay drafts — you can calculate and preview payslips, and finalise them once you upgrade.

Signing in

How to: sign in

- 1 Go to the ORYX Business website and choose to sign in. The **Sign in** page opens.
- 2 Type your **Email** and **Password**.
- 3 Click **Sign in**. You arrive on the Dashboard, or on the first page your role may open.

If your email address is a Google account (Gmail or Google Workspace), you can click **Continue with Google** instead and choose that account — no password to remember. Google matches you by email address. This works for everyone who signed up themselves; for people an administrator added, it depends on the **Sign-in method** the administrator chose (see Settings → Users & roles).

CAREFUL

After several wrong passwords, ORYX Business makes you wait a few minutes before you can try again. The message tells you how long.

How to: reset a forgotten password

- 1 On the sign-in page, click **Forgot your password?**
- 2 Check the email address and click **Email me a reset link**.
- 3 Open the email and click the button in it. The link works once and expires after 60 minutes.
- 4 Type your new password (10 or more characters) in both boxes and click **Save new password**.
- 5 Sign in with the new password.

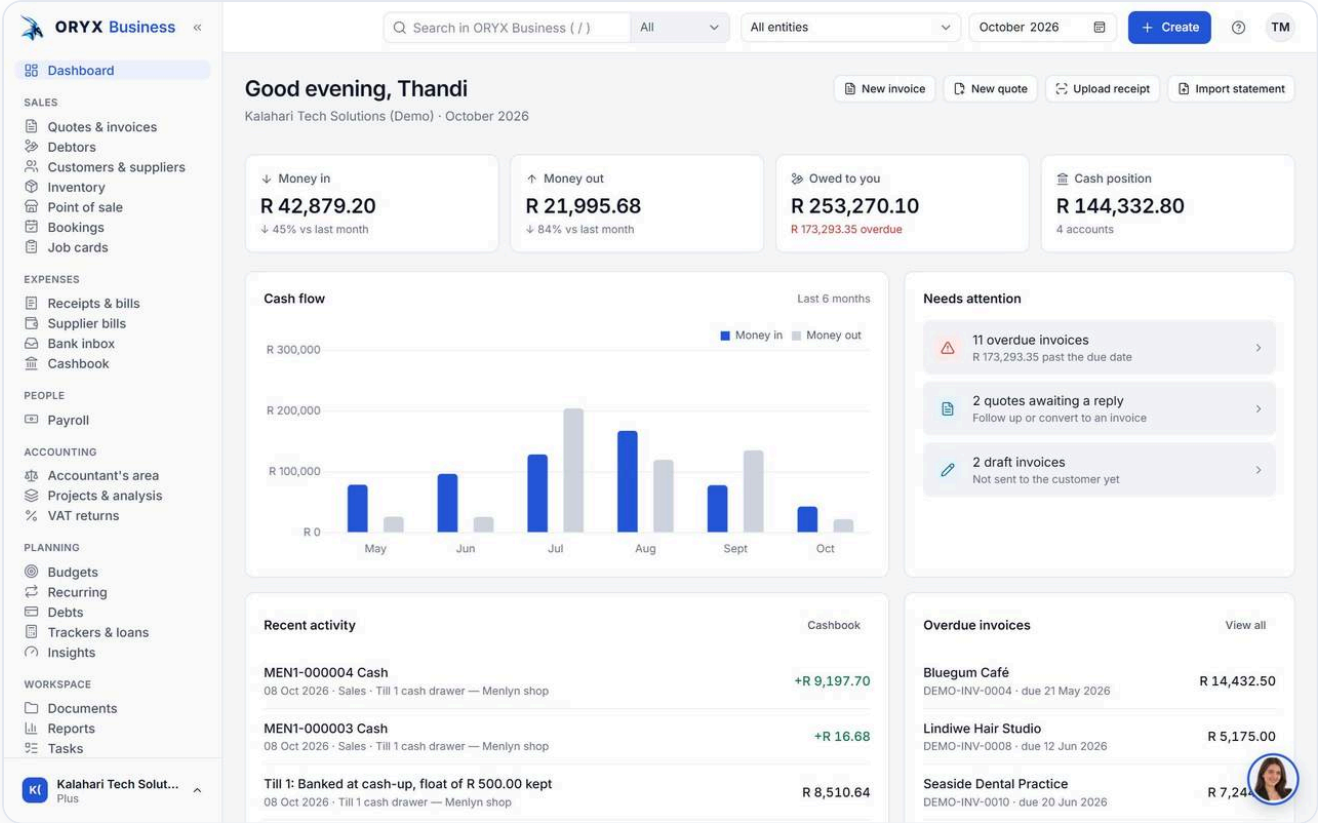
If the link has expired or was already used, the page says so and lets you ask for a new one. Need more help signing in? The sign-in page has a **Need help? Contact support** link that works without an account.

When someone else added you

Owners and administrators add staff under **Settings** → **Users & roles**. They enter your email address, choose your sign-in method and set your first password. ORYX Business does not send an invitation email, so the person who added you gives you these details. If you already use ORYX Business in another organisation, you simply sign in as usual and the new organisation appears in your organisation menu (see below).

To change your password once you are in, open the profile menu (your initials, top right) and choose **Change password**.

The screen at a glance



The main screen: the menu on the left, the top bar, and the page itself.

The menu (sidebar)

The menu on the left lists the pages you may open. It is built from three things: what your plan includes, which modules your organisation has switched on, and what your role allows. So two people in the same organisation may see different menus. The pages are grouped like this:

Group	Pages
(top)	Dashboard
Sales	Quotes & invoices, Debtors, Customers & suppliers, Inventory, Point of sale, Bookings, Job cards
Expenses	Receipts & bills, Supplier bills, Bank inbox, Cashbook
People	Payroll
Accounting	Accountant's area, Projects & analysis, VAT returns
Planning	Budgets, Recurring, Debts, Trackers & loans, Insights
Workspace	Documents, Reports, Tasks, Calendar, Ideas, Notes, Phone
System	Settings

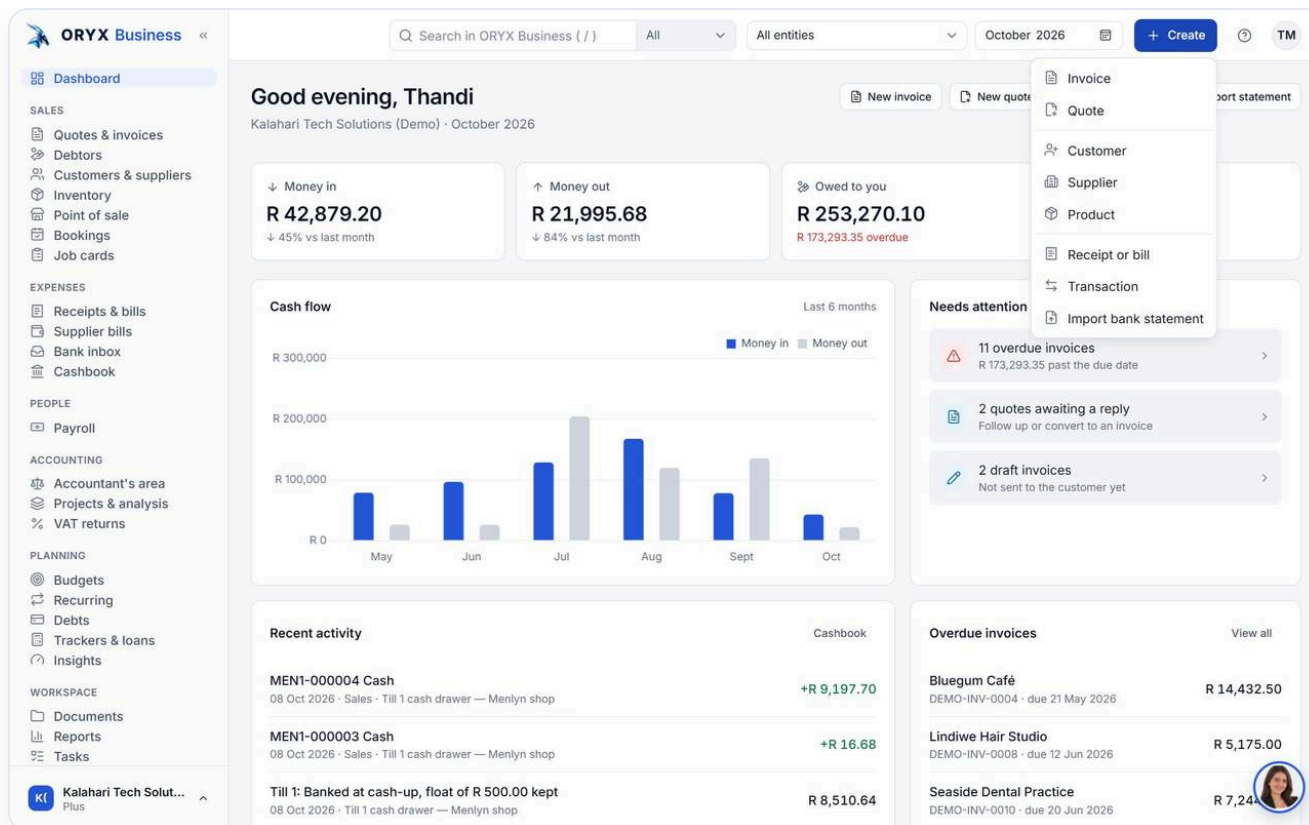
A small number next to **Receipts & bills**, **Bank inbox** or **Accountant's area** shows how many items are waiting for you. The arrows button at the top of the menu (**Collapse menu**) shrinks the menu to icons only; hover over an icon to see its name, and click the button again (**Expand menu**) to open it. ORYX

Business remembers your choice on that computer.

At the bottom of the menu is the **organisation button**: your organisation's name and plan (with "· trial" during a trial). Click it for **Organisation profile**, **Plan & billing** and **Settings**, and to switch organisation if you belong to more than one.

The top bar

Item	What it does
Page title	The name of the page you are on.
Search	Finds customers, invoices and credit notes, quotes and products. Pick where to look in the small list next to the box (All , Customers , Invoices , Quotes , Products), then type at least two letters. Press / anywhere to jump to the search box, use ↑ ↓ and Enter to open a result, and Esc to close the list.
Business selector	Chooses which business the page shows. All entities combines all the businesses you can see. It only appears on pages that use it (Dashboard, Cashbook, Budgets, Quotes & invoices, Inventory, Reports, Customers & suppliers, Job cards, Recurring, Bank inbox and Insights) and only when you have two or more businesses.
Period	A month picker on the Dashboard, Cashbook, Budgets, Reports and Bank inbox. Choose a month to look back in time.
Create	A shortcut menu for new things, wherever you are: Invoice , Quote , Customer , Supplier , Product , Receipt or bill , Transaction and Import bank statement . You only see what your plan and role allow.
Help (?)	Opens Help & support , where you can ask the ORYX Business team a question.
Profile menu	The circle with your initials. It shows your name, email, role and organisation, and has Plan & billing , Help & support , Change password , Dark mode / Light mode and Sign out .



The Create menu: everything you can make, from any page.

Messages from the ORYX Business team, such as planned maintenance, sometimes appear in a bar above the page. Information messages have a **x** to hide them.

In the bottom right corner is a round photo button: that is **Mienx**, your assistant. See the chapter on Mienx.

Using ORYX Business on a phone

On a phone the menu moves to a bar along the bottom of the screen:

- **Home** opens the Dashboard.
- **Sales** opens Quotes & invoices (or Customers & suppliers or Inventory, if that is what you have).
- **Create**, the round button in the middle, opens the same Create menu as on a computer.
- **Expenses** opens Receipts & bills (or the Cashbook or Bank inbox).
- **More** opens a sheet with every page in your menu, grouped as on a computer, plus **Help & support**, **Light / dark** and **Sign out**. Tap the **x** or outside the sheet to close it.

On a tablet, the menu shows icons only; tap the button at the top of the menu to open it fully for a moment.

Switching organisation

If you work in more than one organisation (for example, a bookkeeper with several clients), you use the same email and password for all of them.

How to: switch to another organisation

- 1 Click the organisation button at the bottom of the menu.
- 2 Under **Switch organisation**, click the organisation you want. A tick marks the one you are in now.
- 3 ORYX Business reloads and opens that organisation's Dashboard.

GOOD TO KNOW

Your role can be different in each organisation, so your menu may change after switching.

Light and dark mode

Open the profile menu and click **Dark mode** (or **Light mode** to go back). On a phone, use **More → Light / dark**. The choice is remembered on that device only.

Signing out

How to: sign out

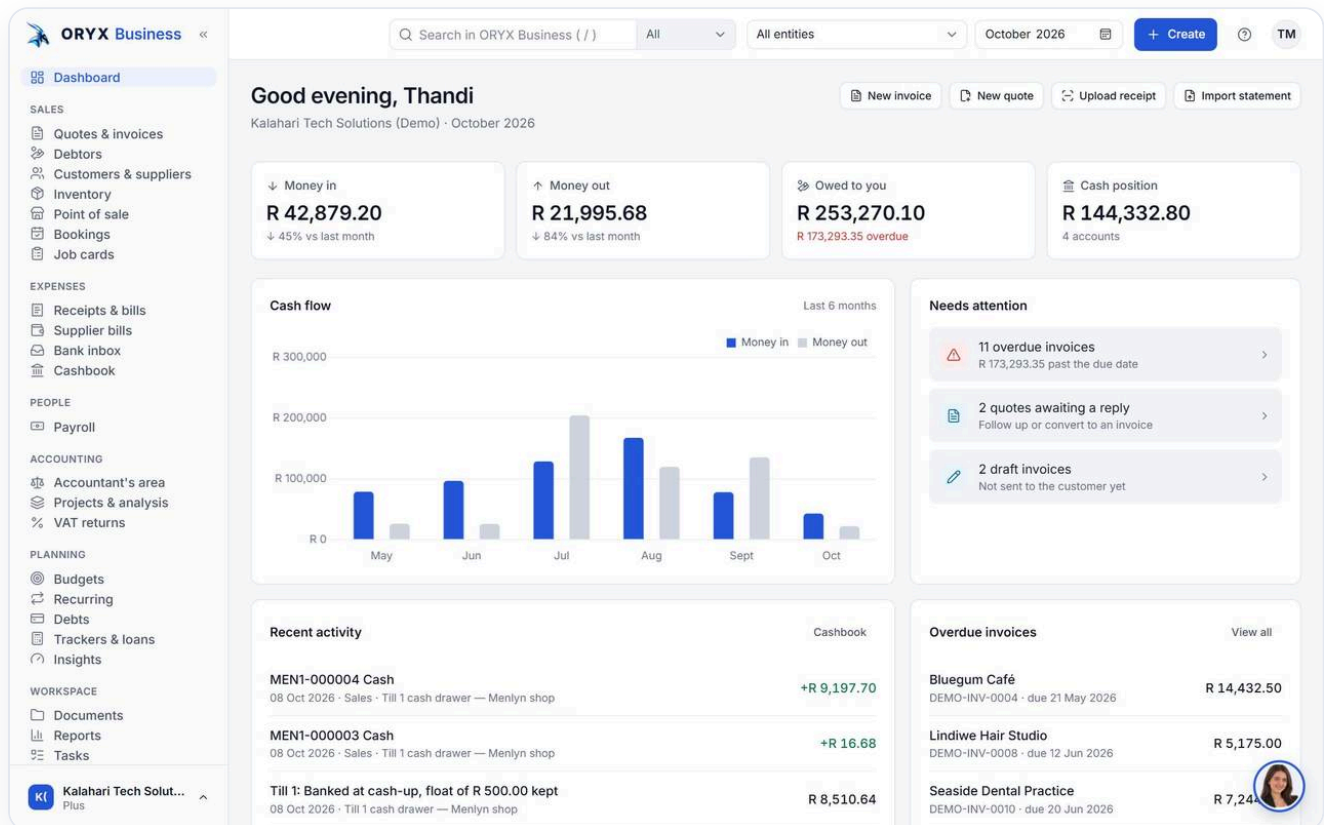
- 1 Click your initials in the top right corner (on a phone, tap **More**).
- 2 Click **Sign out**.
- 3 Confirm with **Sign out** in the **Sign out?** box.

TIP

Always sign out on a shared or public computer.

Dashboard

The Dashboard is your home page: a one-screen picture of the month, what customers owe you, and what needs your attention today. Owners and managers usually start their day here, but everyone sees a version that matches their role.



The Dashboard: key figures at the top, cash flow and the "Needs attention" list below.

What you see

The page greets you by name ("Good morning", "Good afternoon" or "Good evening"). Under the greeting is the business you are looking at (or your organisation's name when **All entities** is selected) and the month.

Two controls in the top bar decide what the Dashboard shows:

- The **business selector** (only when you have two or more businesses): one business, or **All entities** for everything you can see.
- The **period** (month picker): the month the figures are for. It starts on the current month.

Quick actions

Buttons in the top right of the page start the most common daily jobs: **New invoice**, **New quote**, **Upload receipt** and **Import statement**. You only see the ones your plan and role allow.

The four figures

Card	What it shows
Money in	Income recorded in the month. Underneath, the change against last month (for example "↑ 12% vs last month"). Click it to open the Cashbook.
Money out	Expenses recorded in the month, with the same comparison.
Owed to you	The total of all unpaid invoices. Underneath, how much of it is overdue, or how many invoices are open. Click it to open Quotes & invoices. If you don't use Quotes & invoices, this card shows Net this month (money in less money out) instead.
Cash position	The total balance of your bank, cash and card accounts, and how many accounts that covers. If your role does not show account balances, you see Net this month here instead.

Cash flow

A bar chart of money in and money out for the last six months, so you can spot a slow month or rising costs at a glance. Hover over a bar to see the exact amount.

Needs attention

A to-do list made for you, most urgent first. Each line is a link straight to the right page:

- **Overdue invoices:** how many, and how much is past the due date.
- **Bills to review:** receipts and bills read from email or uploaded, waiting for you to check and approve.
- **Bank notifications to confirm:** payments picked up from your bank alerts in the Bank inbox.
- **Quotes awaiting a reply:** follow them up, or convert them to invoices.
- **Draft invoices:** invoices not yet sent to the customer.
- **Products low on stock:** at or below their reorder level.
- Up to three **tasks** due today or overdue.

When nothing is waiting, the panel says **You're all caught up**.

Recent activity

The latest transactions with date, category, account and amount (income shows with a plus). The **Cashbook** link opens the full list. If you have no transactions yet, an **Import statement** button helps you get started.

The right-hand column

Panel	What it shows
Overdue invoices	Each overdue invoice with customer, number, due date and balance. Click one to open it; View all opens the overdue list.
VAT · <i>month</i>	Marked Estimate. Output VAT on invoices issued, Input VAT on expenses recorded, and the Net VAT payable (or refundable). Shown only when there is VAT in the month.

Spending by category	A ring chart of the month's expenses by category.
Coming up	Your next appointments from the Calendar, with a Calendar link.
Businesses	Only with All entities selected and two or more businesses: money in, money out and the net for each business. Click a business to switch the Dashboard to it.

If you use budgets, a **Budgets · month** panel at the bottom shows a progress bar per budget: how much is spent, how much is left, or how far over you are. **Manage** opens the Budgets page.

GOOD TO KNOW

The Dashboard only shows panels for the modules your organisation uses and your role may see. A sales person, for example, may not see bank balances.

Working with the Dashboard

How to: look at one business, or all of them

- 1 In the menu, open **Dashboard**.
- 2 In the top bar, open the business selector.
- 3 Choose a business, or **All entities** to combine them.
- 4 With **All entities**, you can also click a business in the **Businesses** panel to jump to it.

How to: see an earlier month

- 1 In the menu, open **Dashboard**.
- 2 Click the month picker in the top bar.
- 3 Choose the month. The figures, VAT estimate, spending chart and budgets change to that month.

The month you choose stays selected while you move to the Cashbook, Budgets, Reports and Bank inbox, so you can follow up on the same period.

How to: work through what needs attention

- 1 In the menu, open **Dashboard**.
- 2 In **Needs attention**, click the first line, for example "3 overdue invoices".
- 3 Deal with the items on the page that opens (send a reminder, approve the bill, confirm the bank notification).
- 4 Go back to the Dashboard. The list updates as items are dealt with.

When you have no business yet

If your organisation has no businesses yet (or none you have access to), the Dashboard shows a welcome card instead of figures.

How to: create your first business

- 1 On the Dashboard welcome card, click **Create a business**.
- 2 Type the **Name**, and choose the **Type: Business**, or **Personal** for household money.
- 3 Pick a **Colour**. It marks this business in lists and charts.
- 4 Enter the **Opening balance (R)**: what the bank account holds today. Use a minus sign for an overdraft.
- 5 Click **Save**. The Dashboard fills in as you start working.

TIP

Prefer to talk it through? Ask Mienx, your assistant (bottom right), to create the business for you.

Tips

TIP

The quickest daily routine: open the Dashboard, clear **Needs attention** from the top down, then use the quick action buttons for new invoices and receipts.

GOOD TO KNOW

The VAT panel is an estimate from your invoices and recorded expenses. For the figures to submit to SARS, use **VAT returns** (in the Accounting group of the menu).

GOOD TO KNOW

If you can't see a figure you expect, check the business selector: you may be looking at a different business, or at **All entities**.

Quotes & invoices

This is where you quote your customers, invoice them and keep track of what they still owe you. Owners, bookkeepers and sales staff use it every day; anyone whose role can only view documents sees everything but cannot change it.

The Quotes & invoices screen

In the menu, open **Sales** → **Quotes & invoices**. At the top you see four summary cards. Click a card to jump to the matching list:

- **Outstanding** — the total still owed on invoices you have sent, and how many invoices that is.
- **Overdue** — the part of that total that is past its due date.
- **Paid · last 30 days** — invoices paid in the last month.
- **Open quotes** — quotes that have been sent and are still waiting for a reply.

Below the cards is the list of all your documents, with tabs to narrow it down: **All**, **Unpaid**, **Overdue**, **Paid**, **Drafts**, **Quotes**, **Credit notes** and **Recurring**. Use the search box (**Search number, customer or reference**) to find a document quickly, and click a column heading to sort.

Quotes & invoices
Quote, invoice and get paid. Everything owed to you, in one place.

Record payment New quote + New invoice

Outstanding
R 253,270.10
15 unpaid invoices

Overdue
R 173,293.35
11 invoices past due

Paid · last 30 days
R 38,379.20
6 invoices

Open quotes
R 20,815.00
2 awaiting a reply

All Unpaid 15 Overdue 11 Paid Drafts 3 Quotes Credit notes Recurring

Search number, customer or reference

Number	Customer	Issued	Due	Amount	Balance due	Status
INV-0009 Invoice · Kalahari Tech Solutions (Pty) Ltd	Greenleaf Property Managers	09 Oct 2026	—	R 34,267.70	R 34,267.70	Unpaid
MEN1-000004 Invoice · Kalahari Tech Solutions (Pty) Ltd	Cash sale	08 Oct 2026	08 Oct 2026	R 9,197.70	R 0.00	Paid
MEN1-000003 Invoice · Kalahari Tech Solutions (Pty) Ltd	Cash sale	08 Oct 2026	08 Oct 2026	R 16.68	R 0.00	Paid
MEN1-000002 Invoice · Kalahari Tech Solutions (Pty) Ltd	Cash sale	08 Oct 2026	08 Oct 2026	R 1,343.43	R 0.00	Paid
CN-0001 Credit note · Kalahari Tech Solutions (Pty) Ltd	Cash sale	08 Oct 2026	—	R 16.68	—	Sent
MEN1-000001 Invoice · Kalahari Tech Solutions (Pty) Ltd	Cash sale	08 Oct 2026	08 Oct 2026	R 17,183.89	R 0.00	Paid
INV-0008 Invoice · Kalahari Tech Solutions (Pty) Ltd	Acme Holdings (Pty) Ltd	08 Oct 2026	06 Nov 2026	R 28,175.00	R 28,175.00	Unpaid

The Quotes & invoices list with its summary cards and tabs.

Column	What it shows
Number	The document number, and whether it is an invoice, quote or credit note.

Customer	Who the document is for.
Issued / Due	The issue date and, for invoices, the due date. Overdue invoices show in red with how many days overdue they are.
Amount	The document total, including VAT.
Balance due	What is still owed on an issued invoice.
Status	Draft, Unpaid, Part paid, Overdue, Paid or Cancelled for invoices; Draft, Sent, Accepted or Declined for quotes.

The buttons at the top right are **Record payment**, **New quote** and **New invoice**. The **More actions** button (...) holds **Import invoices**, **Customer statements** and **New recurring invoice**. Every row also has its own ... menu with everything you can do with that one document.

Drafts and issued documents

Every quote, invoice and credit note starts life as a **draft**. A draft is your working copy: you can change it freely, and it does not count as money owed. When you **create** (issue) an invoice it becomes final:

- it appears under **Unpaid** until it is paid;
- any stock items on it are taken out of stock (see the Inventory chapter);
- it is locked — it can no longer be edited in place.

If an issued invoice really needs correcting, open the row's ... menu and choose **Mark as draft** first. The stock goes back, and you can edit it again. A paid invoice cannot be changed at all; if the payment was recorded by mistake, delete the payment first.

GOOD TO KNOW

Sending a draft invoice by email (or by WhatsApp through Mienx) issues it at the same moment. Before anything is sent, the stock is checked — if there is not enough stock, the document is not sent and you are told why.

Creating a quote or invoice

Quotes and invoices open in a full-page editor with three numbered steps — **Customer**, **Invoice details** (or **Quote details**) and **Line items** — and a bar at the bottom with the running total and the action buttons.

The invoice editor: customer, document details, line items and the summary.

How to: create an invoice

- 1 In the menu, open **Sales** → **Quotes & invoices** and click **New invoice** (or **New quote** for a quote).
- 2 Under **1 Customer**, start typing in **Select customer — type a name, company or email...** and pick the customer from the list. Their email, address and payment terms are filled in for you.
- 3 Under **2 Invoice details**, check the **Issue date** and **Due date**. Use the **7d**, **14d**, **30d** or **60d** buttons to set the due date quickly. Add a **Customer reference / PO number** if the customer gave you one.
- 4 Under **3 Line items**, type a description (or a product name, SKU or barcode to pick a product), then the **Qty** and **Unit price**. Press **Enter** on a price to start the next line, or click **Add item**.
- 5 Check the summary: **Subtotal**, **Discount**, **VAT** and **Total**.
- 6 Optionally open **Notes & terms** and add payment terms, a bank reference or delivery notes.
- 7 Click **Preview** to see the document exactly as the customer will see it.
- 8 Click **Create invoice** to issue it, or **Save draft** to finish it later.
- 9 In the confirmation that appears, choose **Email to ...**, **Print / PDF** or **Back to list**.

TIP

Keyboard shortcuts in the editor: **Ctrl** + **S** saves a draft and **Ctrl** + **Enter** creates the document. **Tab** moves across a line. If you try to leave with unsaved changes, you are asked first.

Choosing or adding the customer

- When you type a name that is not in your list, you can choose **Add "..."** as a new customer — the customer is created on the spot and you can fill in their email and address.
- Or choose **Use "..."** just for this invoice (no customer record) for a once-off sale.
- **Enter details manually** opens the name, **Email** and **Address** fields so you can type or correct them. On the customer card, **Change** picks a different customer and **Edit details** opens the same fields.
- If the customer card says **no email — add one to send this by email**, type the address in. When you save, an email or address you typed for a customer who had none is also stored on the customer's record.
- If the customer has payment terms, the due date is set from them automatically.

Line items, discounts and VAT

- **Products:** if you use Inventory, typing two or more letters in the description shows matching products with their price and how many are in stock. Pick one to fill in the name and price. A small product tag shows under the line; click the **x** on it to unlink the product but keep the text and price. If the quantity is more than is in stock, the stock figure turns red.
- **Serial numbers:** for a product tracked by serial number, a field appears under the line on invoices and credit notes — enter one serial number per unit, separated by commas. An invoice for such a product cannot be issued without them.
- **Disc %:** a percentage discount on that line. This column shows when **I give discounts on individual lines** is switched on under **Settings → Documents & numbering**.
- **VAT per line:** **Default**, **15%**, **0%** or **Exempt**. Default follows the VAT switch in the summary. A product's own VAT setting is used when you pick it.
- Prices you type exclude VAT; VAT is worked out per line and added on top. Invoices made at the till keep their VAT-inclusive shelf prices, and VAT is worked out from those.
- The **VAT (15%)** switch in the summary turns VAT on or off for the whole document. It only appears for a business that has a VAT number. Without one you see a note that no VAT is charged — add the VAT number under **Settings → Business books** to issue tax invoices.

Numbers, dates and notes

The next number is suggested automatically. You can type over it, but every number must be unique. Owners and admins see a small gear next to the number that opens the number preferences: keep numbers automatic with your own **Prefix** and **Next number**, tick **Restart numbering at the start of each financial year**, or switch to entering numbers manually. The same settings are under **Settings → Documents & numbering**, along with **Invoice & quote design** (layout, colour and wording) and the **Default payment terms for new invoices**.

A new quote is valid for 30 days by default (**Valid until**). A new invoice's due date uses your default terms, or the customer's own terms. **Notes & terms** are printed on the document, and a new document starts with the notes you used on the last one of the same kind.

If you have more than one business, choose the right one in **Book** under the document details.

Printing, PDF and email

How to: email an invoice or quote

- 1 In the menu, open **Sales** → **Quotes & invoices**.
- 2 Open the ... menu on the document's row and choose **Email to customer** (or open an issued document and click **Email**).
- 3 Check the **To** address — it is filled in from the document.
- 4 Change the **Subject** and **Message** if you like.
- 5 Click **Send**. The full document is included in the body of the email, sent in your business's name.

To print or save a PDF, choose **Download PDF** in the row's menu, or **Print / PDF** on an issued document. The document opens in a new tab with your browser's print window; choose **Save as PDF** as the printer to keep a PDF copy.

GOOD TO KNOW

If email sending has not been set up yet, you see a message asking for it to be set up first, and nothing is sent.

Sending by WhatsApp with Mienx

Mienx, your assistant, can prepare a quote, invoice or credit note for WhatsApp. She makes a private view link that the customer opens on their phone without signing in, and writes a short WhatsApp message with that link. The customer sees the document exactly as it prints, with a **Print / save as PDF** button. The link works for 90 days.

How to: send an invoice by WhatsApp

- 1 Click the round Mienx button with her picture to open the assistant.
- 2 Ask, for example: "Send invoice INV-0012 to the customer on WhatsApp". You can also say "send it to me" to receive it on your own WhatsApp first.
- 3 Mienx reads back the document number, the total and exactly who it goes to. Check it and say yes.
- 4 If the customer has no cell number on file (or Mienx does not know your own number yet), she asks for it. She remembers your own number for next time.
- 5 Tap the **Send on WhatsApp** button in her reply. WhatsApp opens with the message ready — tap send.

GOOD TO KNOW

WhatsApp is not connected for automatic sending: you always press send in WhatsApp yourself. A draft invoice is issued as soon as the WhatsApp link is made, so the stock is checked first. Mienx can also create the quote or invoice for you — tell her the customer and the lines, and confirm what she reads back.

Quotes to invoices

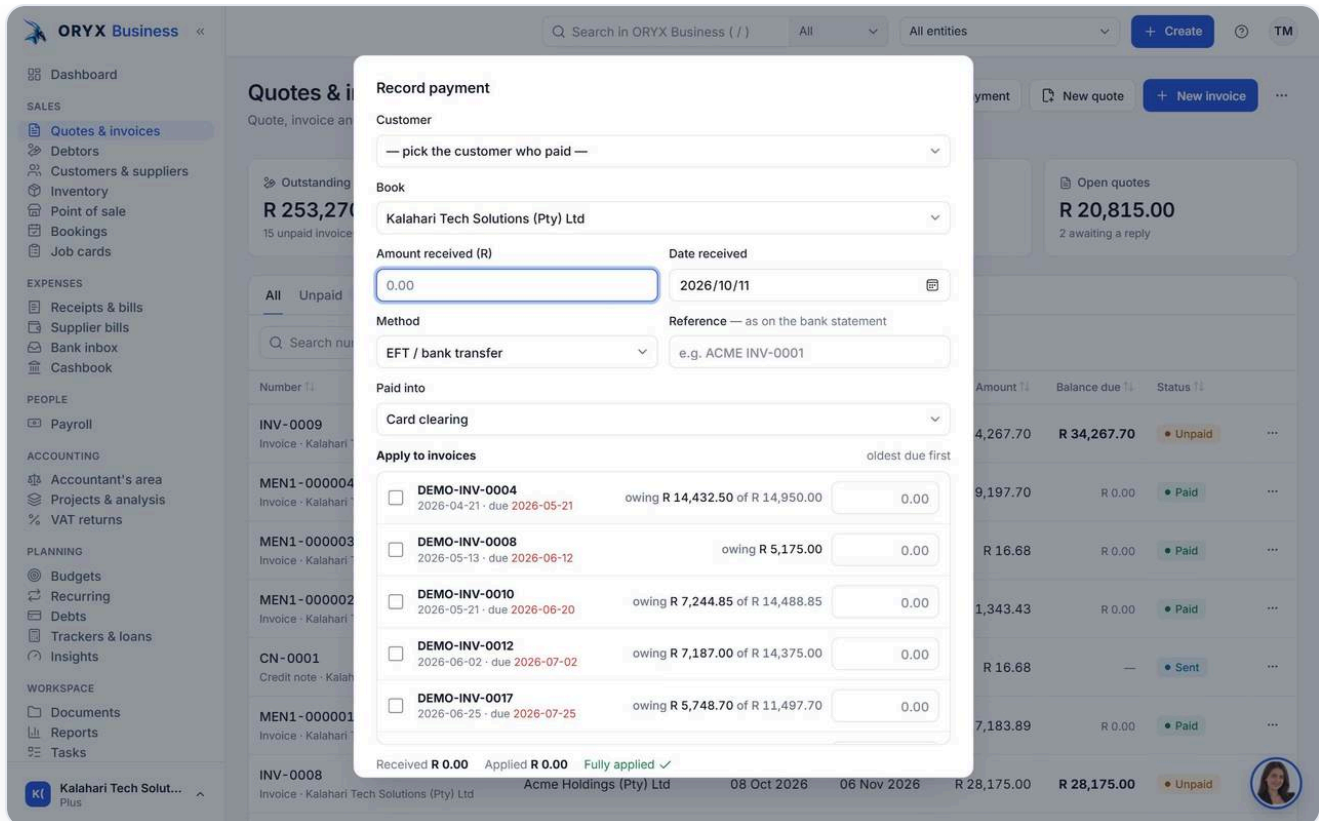
How to: convert a quote to an invoice

- 1 In the menu, open **Sales** → **Quotes & invoices** and click the **Quotes** tab.
- 2 Open the quote's ... menu and choose **Convert to invoice** (or open the quote and click **Convert to invoice**).
- 3 A new draft invoice opens with the same customer and lines, dated today, with the due date from the customer's terms (or your default terms).
- 4 Check the due date and lines, then click **Create invoice**.

The quote is marked **Accepted** and kept exactly as it was. A quote can only be converted once. You can also use **Mark as sent**, **Mark as accepted** or **Mark as declined** in a quote's menu to keep your list tidy.

Recording payments

When a customer pays, record the payment so the invoice shows as paid and the money appears in your cashbook. One payment can pay several invoices at once.



Recording a payment and applying it to open invoices.

How to: record a payment

- 1 In the menu, open **Sales** → **Quotes & invoices** and click **Record payment** (or choose **Record payment** in an invoice's menu).
- 2 Pick the **Customer** who paid, if it is not already filled in.
- 3 Enter the **Amount received (R)** and the **Date received**.
- 4 Choose the **Method** (EFT / bank transfer, Cash, Card or Other) and type the **Reference** as it appears on the bank statement.
- 5 Under **Paid into**, choose the bank account. Choose **Not banked yet — no cashbook entry** if the money is not in the bank yet.
- 6 Under **Apply to invoices**, the amount is spread over the customer's open invoices, oldest due first. Tick or untick invoices, or type amounts, to change it.
- 7 Click **Record payment**.

Anything not applied to an invoice stays on the customer's account as credit — you are asked to confirm this. Choosing **Mark as paid** on an invoice opens the same payment window. Payments on an invoice are listed in its **Payments** section; the bin icon deletes a payment, which puts the invoices it paid back to unpaid and removes its cashbook entry.

Credit notes

A credit note reduces what a customer owes — for returned goods, a pricing error or work not done.

How to: issue a credit note

- 1 In the menu, open **Sales** → **Quotes & invoices**.
- 2 Open the invoice's ... menu and choose **Credit note** (or open the invoice and click **Credit note**).
- 3 The invoice's lines are copied in. Remove the lines you are not crediting and adjust quantities or prices.
- 4 Fill in **Reason for credit**, for example "Goods returned — faulty unit".
- 5 For stock items, leave **back in stock** ticked if the goods came back, or untick it if they did not.
- 6 Click **Issue credit note**.

The credit note is applied to the invoice straight away, as far as the invoice's balance goes. Goods ticked **back in stock** return to stock. You can only return as many items as the invoice sold, and only serial numbers that were sold on it. Credit notes are listed on the **Credit notes** tab.

Duplicating, cancelling and deleting

- **Duplicate** starts a new document of the same kind with the same customer and lines. Check the dates and lines before you create it. Serial numbers are never copied.
- **Mark as cancelled** cancels an issued invoice or credit note; any stock it moved goes back. An invoice with payments or credits recorded against it cannot be cancelled until those are removed.
- **Delete** removes a draft for good. Numbers already used are not reused. An issued invoice cannot be deleted — cancel it instead, so the number stays accounted for.

Customer statements

A statement lists a customer's invoices, payments and balance for a period.

ORYX Business «

Search in ORYX Business (/) All All entities + Create ? TM

Quotes & invoices Record payment New quote + New invoice ...

Quote, invoice and get paid. Everything owed to you, in one place.

Outstanding **R 253,270.10**
 15 unpaid invoices

Overdue **R 173,293.35**
 11 invoices past due

Paid - last 30 days **R 38,379.20**
 6 invoices

Open c **R 20,€**
 2 awaiting a reply

Import invoices
 Customer statements
 New recurring invoice

All Unpaid 15 Overdue 11 Paid Drafts 3 Quotes Credit notes Recurring

Search number, customer or reference

Number	Customer	Issued	Due	Amount	Balance due	Status	
INV-0009 Invoice - Kalahari Tech Solutions (Pty) Ltd	Greenleaf Property Managers	09 Oct 2026	—	R 34,267.70	R 34,267.70	Unpaid	...
MEN1-000004 Invoice - Kalahari Tech Solutions (Pty) Ltd	Cash sale	08 Oct 2026	08 Oct 2026	R 9,197.70	R 0.00	Paid	...
MEN1-000003 Invoice - Kalahari Tech Solutions (Pty) Ltd	Cash sale	08 Oct 2026	08 Oct 2026	R 16.68	R 0.00	Paid	...
MEN1-000002 Invoice - Kalahari Tech Solutions (Pty) Ltd	Cash sale	08 Oct 2026	08 Oct 2026	R 1,343.43	R 0.00	Paid	...
CN-0001 Credit note - Kalahari Tech Solutions (Pty) Ltd	Cash sale	08 Oct 2026	—	R 16.68	—	Sent	...
MEN1-000001 Invoice - Kalahari Tech Solutions (Pty) Ltd	Cash sale	08 Oct 2026	08 Oct 2026	R 17,183.89	R 0.00	Paid	...
INV-0008 Invoice - Kalahari Tech Solutions (Pty) Ltd	Acme Holdings (Pty) Ltd	08 Oct 2026	06 Nov 2026	R 28,175.00	R 28,175.00	Unpaid	...

Kalahari Tech Solut... Plus

Customer statements: everyone who owes you, ready to email.

How to: email statements to customers who owe you

- 1 In the menu, open **Sales** → **Quotes & invoices**.
- 2 Click **More actions (...)** and choose **Customer statements**.
- 3 Set the **Statement from** and **To** dates.
- 4 The list shows each customer who owes money, with **Owed**, **Overdue** and **Last sent**. Click the eye icon to view one statement.
- 5 Tick the customers to send to (customers without an email address cannot be ticked).
- 6 Click **Email statements** and confirm.

When you view one statement, use the **This month**, **Last 3 months**, **This year** or **Everything** buttons to change the period, **Print / PDF** to print it, or **Email statement** to send it with your own message. You can also open a statement from a customer's page with the **Statement** button.

Recurring invoices

For retainers, rent, service contracts or subscriptions, set up a recurring invoice and the invoices are created for you on schedule. Click the **Recurring** tab, or choose **More actions** → **New recurring invoice**. This is explained in full in the **Recurring** chapter.

Importing invoices from another system

How to: import your invoice history

- 1 Export your invoices from Xero, Zoho Books or Sage One (or prepare a CSV or Excel file).
- 2 In the menu, open **Sales** → **Quotes & invoices**, click **More actions (...)** and choose **Import invoices**.
- 3 Drop the file in the box, or click the box to choose the file.
- 4 Under **These invoices belong to**, choose the business.
- 5 Check the preview: how many invoices and quotes will be imported, which are skipped and why, and how many new customers will be created.
- 6 Click **Import ... document(s)**.

Each invoice keeps its own number, dates, lines and VAT rates. Every total is checked against the file, and invoices that do not add up are listed instead of imported. Imported invoices arrive as issued documents — record payments against them as usual.

TIP

You can start a quote or invoice from anywhere with the **Create** button at the top of the screen, or from a customer's page with **New invoice** or **New quote**.

GOOD TO KNOW

If a period has been locked in the books, documents dated in that period can no longer be issued, changed or paid — you are told why when you try.

Debtors

Debtors shows who owes you money, for how long, and what has been done about it. Use it to chase payments: see your age analysis, log calls and promises to pay, set follow-up dates and send payment reminders by email — by hand or automatically.

The Debtors screen

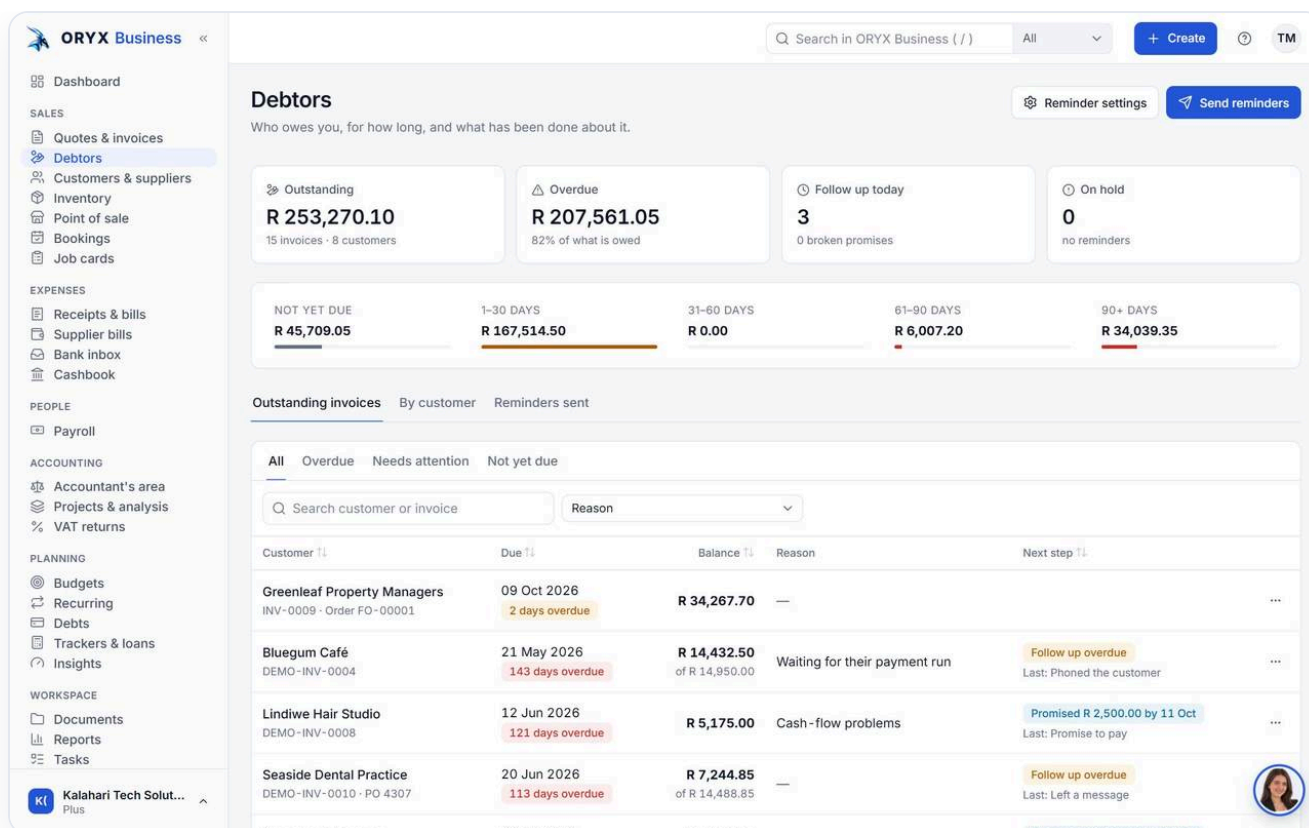
In the menu, open **Sales** → **Debtors**. Debtors works on the issued invoices of a business; if you have more than one business, choose it in the box at the top right. Next to it are **Reminder settings** and **Send reminders**. When automatic reminders are switched on, the page heading shows **Automatic reminders on**.

Four cards give you the picture at a glance:

- **Outstanding** — everything owed to you, with the number of invoices and customers.
- **Overdue** — the part that is past due, and what percentage of the total that is.
- **Follow up today** — follow-ups that are due today or late, plus broken promises to pay. Click this card to show only those invoices; click it again to show everything.
- **On hold** — invoices that get no reminders for now.

Under the cards is the ageing bar: **Not yet due**, **1–30 days**, **31–60 days**, **61–90 days** and **90+ days** overdue, each with its amount. Click a bucket to show only those invoices; **Show all** clears the filter.

The page has three tabs: **Outstanding invoices**, **By customer** and **Reminders sent**.



Debtors: the summary cards, the ageing bar and the outstanding invoices.

Outstanding invoices

This tab lists every issued invoice with a balance. The columns are **Customer** (with the invoice number), **Due** (how many days overdue, or when it is due), **Balance**, **Reason** (why it has not been paid) and **Next step** (a promise to pay, the follow-up date, whether it is on hold and the last step taken). Use the small tabs **All**, **Overdue**, **Needs attention** (follow-up due or promise broken) and **Not yet due**, the **Reason** filter, or the search box.

Click an invoice to open its side panel: balance, issue and due dates, the reason, any promise and follow-up date, the customer's phone (tap to call) and email, and the full **Collection history**. From there you can **Log a step**, **Put on hold**, **Open invoice** or open the **Customer**.

Logging what you did (follow-ups and promises)

Every call, message or promise you log is kept in the collection history, so anyone in your team can see what has happened.

How to: log a call and a promise to pay

- 1 In the menu, open **Sales** → **Debtors**.
- 2 Open the invoice's ... menu and choose **Log a step** (or click the invoice and then **Log a step**).
- 3 Under **What did you do?**, choose the action, for example **Phoned the customer**. The **Follow up on** date fills in from the action — change it if you like.
- 4 Under **Why haven't they paid?**, choose a reason, such as **Waiting for their payment run**.
- 5 Type a **Note**: who you spoke to and what was agreed.
- 6 If they promised to pay, fill in **Promised to pay by** and the **Promised amount (R)** (it defaults to the balance).
- 7 Click **Save**.

When the follow-up date arrives, the invoice shows **Follow up today** (or **overdue**) and is counted on the **Follow up today** card. If the promised date passes and the invoice is still open, it shows **Promise broken**.

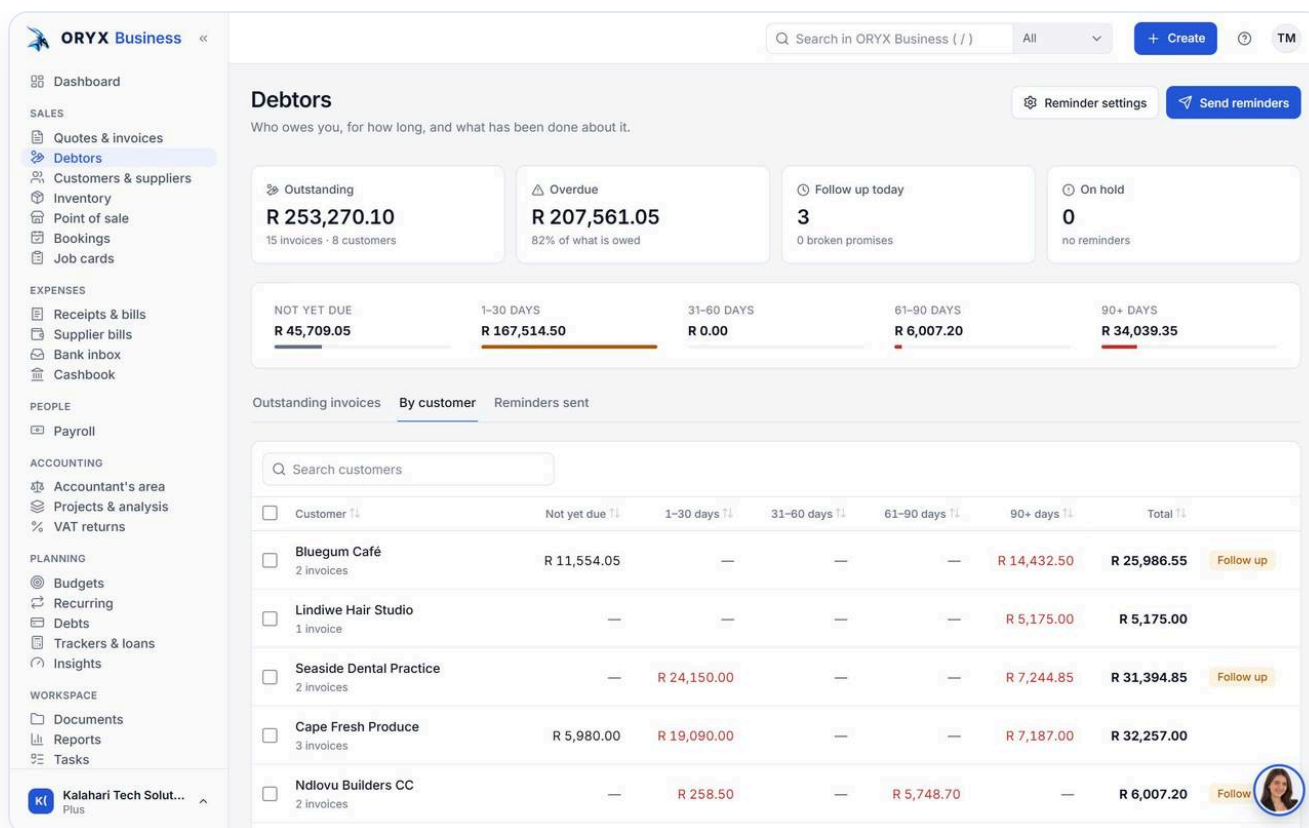
The actions you start with are **Phoned the customer**, **Left a message**, **Emailed / WhatsApp reminder**, **Promise to pay**, **Payment arrangement agreed**, **Escalated** and **Handed over for collection**. You can change them and the reasons under **Reminder settings**.

Putting an invoice on hold

If a customer has a query on an invoice, choose **Put on hold**. That invoice gets no reminders until you choose **Resume reminders**. The customer's other invoices are not affected.

By customer: the age analysis

The **By customer** tab is your age analysis: one row per customer with what they owe in each bucket (**Not yet due**, **1–30 days**, **31–60 days**, **61–90 days**, **90+ days**) and the **Total**. Badges show **Promise broken** or **Follow up**, and the row notes customers with no email or who get no reminders. Click a column heading to sort, for example by **90+ days**.



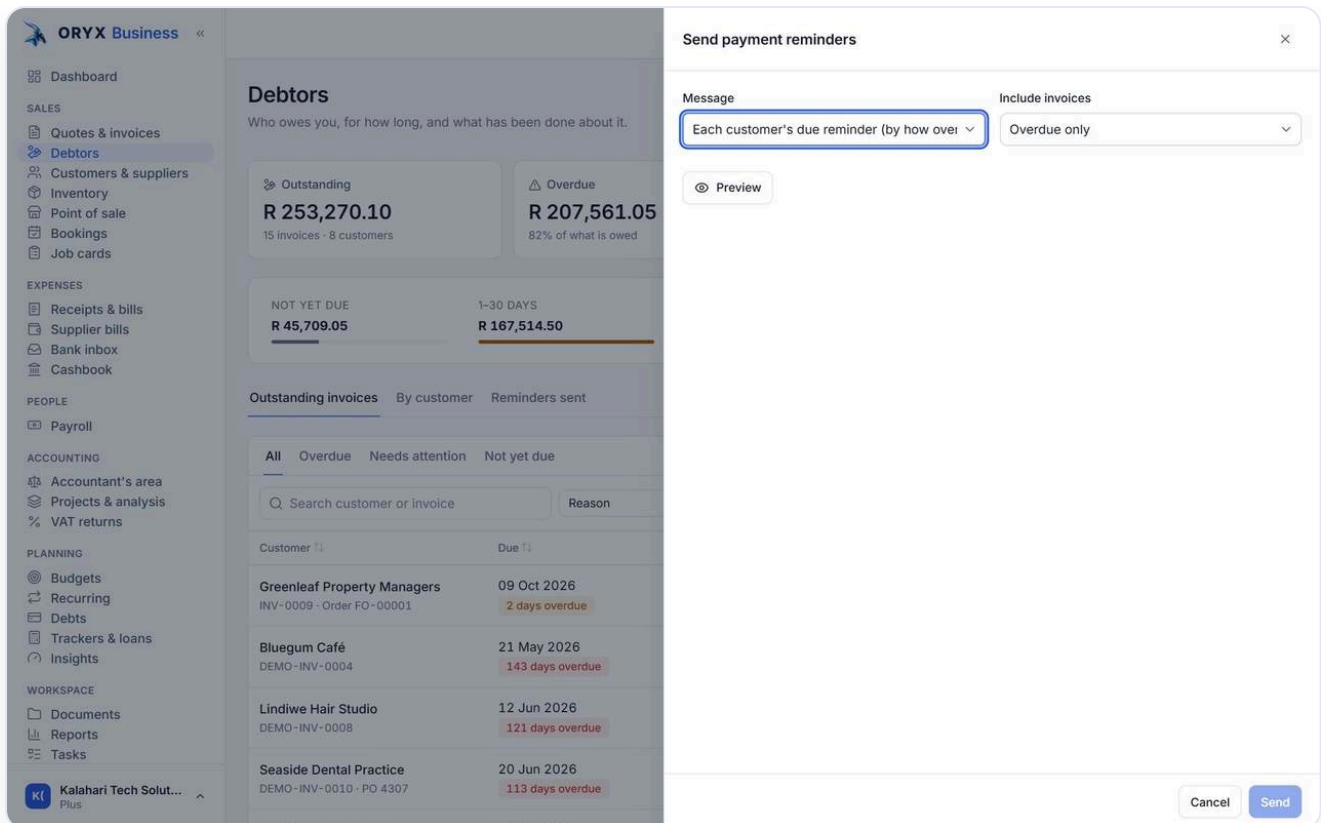
The age analysis by customer.

Click a customer to open their panel: what they **Owe**, what is **Overdue**, any **Credit on account**, their open invoices, the collection history and the reminder emails they were sent. From here you can **Log a step** for the customer as a whole (a follow-up date or reason then applies to all their open invoices), **Send reminder** or **Email statement**.

Under **Reminders for this customer** you can tick **Never send this customer payment reminders**, or type another address to send their reminders to (for example their accounts department), and click **Save**.

Sending payment reminders

A reminder is one email per customer listing all their open invoices, with your payment details. You always see a preview of who gets what before anything is sent.



Sending payment reminders: choose the message, preview, then send.

How to: send payment reminders

- 1 In the menu, open **Sales** → **Debtors** and click **Send reminders**. To remind only some customers, tick them on the **By customer** tab and choose **Send reminder** instead.
- 2 Under **Message**, keep **Each customer's due reminder (by how overdue they are)**, pick one reminder for everyone, or choose **My own message...** and write a subject and message.
- 3 Under **Include invoices**, choose **Overdue only**, **More than 14 days overdue**, **More than 30 days overdue** or **Also those not yet due**.
- 4 Click **Preview**. You see how many emails will go out, each customer with their invoices and total, and an example email.
- 5 Check the customers marked as skipped and why — for example **No email address**, **All invoices on hold**, **Customer asked not to get reminders** or **Below the minimum amount**.
- 6 Click **Send ... emails**.

GOOD TO KNOW

If you change any choice after previewing, preview again before sending. If the debts change between the preview and the send, you are asked to preview again, so nobody gets an out-of-date reminder. Each reminder sent is added to the collection history.

Reminder settings and automatic reminders

How to: switch on automatic reminders

- 1 In the menu, open **Sales** → **Debtors** and click **Reminder settings**.
- 2 Switch on **Send reminders automatically**. Reminders then go out on weekdays between 08:00 and 17:00, and each reminder is sent only once per invoice.
- 3 Set **Don't remind for less than (R)** so small balances are left alone (R 10.00 to start with).
- 4 Leave **Put the full statement under each reminder** on if you want the customer's statement included.
- 5 Under **Reminders**, open each reminder to switch it on or off, change when it is sent, and edit its subject and message.
- 6 Click **Save**.

There are five reminders. **Due soon** (a friendly heads-up a few days before the due date) starts switched off; **Just overdue** (1 day), **14 days overdue**, **30 days overdue** and **Final notice** (60 days) start switched on. In the messages you can use placeholders such as `{{customer_name}}`, `{{overdue_total}}`, `{{oldest_days}}`, `{{invoice_list}}` and `{{payment_details}}` — they are filled in for each customer.

Also in Reminder settings: **Non-payment reasons** (the list for "Why haven't they paid?") and **Actions** (what your team can log, each with the number of days until the next follow-up). Type in the empty line and click **Add**, or change one and click **Save**; untick **In use** to retire one.

Reminders sent

The **Reminders sent** tab lists every reminder run — the date, whether it was **Automatic** or sent by a person, and how many were sent, failed or skipped. Open a run to see each customer, the address it went to and any error.

TIP

Start each day with the **Follow up today** card: it shows exactly the invoices someone promised to look at today, and every broken promise.

GOOD TO KNOW

Payments are recorded under **Sales** → **Quotes & invoices (Record payment)**. As soon as an invoice is paid it disappears from Debtors. Only people whose role may change sales documents can log steps, send reminders or change the settings; others can look.

Customers & suppliers

One address book for everyone you sell to and buy from. Each contact keeps their details, payment terms and a history of their quotes, invoices and payments, so you can see the whole relationship in one place.

The Customers & suppliers screen

In the menu, open **Sales** → **Customers & suppliers**. The list has three tabs — **All**, **Customers** and **Suppliers** — and a search box (**Search name, company, email or phone**). A contact who is both a customer and a supplier appears on both tabs. The buttons at the top right are **Import** and **Add contact**.

Customers & suppliers

Everyone you sell to and buy from, with their documents and payments.

Import Add contact

All Customers Suppliers

Search name, company, email or phone

Name ↑	Type ↑	Contact	Paid to you ↑	You spent ↑	Documents ↑
CS Cape Cabling Supplies	Supplier	sales@capecabling.example	—	R 8,694.00	0 ...
CL CloudSoft Licensing	Supplier	invoices@cloudsoft.example	—	R 14,932.75	0 ...
DB Dr Anke Botha	Customer	reception@seaside-dental.example 021 555 0190	R 13,150.00	—	4 ...
FI Fatima Isaacs	Customer	orders@capefresh.example 021 555 0170	R 17,900.00	—	6 ...
HD Highveld IT Distributors	Supplier	orders@highveld-it.example	—	R 130,860.00	0 ...
JP Johan Pretorius	Customer	stay@mountainview.example 044 555 0132	R 64,646.00	—	4 ...
KS Karoo Courier Services	Supplier	accounts@karoo-courier.example	—	R 4,720.75	0 ...
LM Lerato Mokoena	Customer	hello@bluegum-cafe.example 082 555 0187	R 39,250.00	—	7 ...
LD Lindiwe Dube	Customer	bookings@lindiwe-hair.example 076 555 0149	R 38,096.00	—	3 ...

The Customers & suppliers list.

Column	What it shows
Name	The contact's name, with their company underneath.
Type	Customer , Supplier or Customer & supplier .
Contact	Email address and phone number.
Paid to you	The value of this customer's paid invoices (before VAT).
You spent	Expenses in your cashbook linked to this contact.
Documents	How many quotes, invoices and credit notes they have.

Each row's ... menu offers **Open**, **Edit** and, for customers, **New quote** and **New invoice**. If you use the Phone feature, you can also call the contact from here.

Adding a contact

How to: add a customer or supplier

- 1 In the menu, open **Sales** → **Customers & suppliers** and click **Add contact**.
- 2 Type the **Name** and choose the **Type: client** (customer), **supplier** or **both**.
- 3 Fill in the **Company**, **Email** and **Phone**.
- 4 Add the **Postal address** and **Street address**.
- 5 Add the **VAT number** and **Company registration no.** if they have them.
- 6 Optionally give an **Account / customer code** and their **Payment terms (days)**. Leave terms blank to use your default terms.
- 7 Add any **Notes** and click **Save**.

The screenshot shows the ORYX Business application interface. The main window is titled 'Customers & suppliers' and displays a list of contacts. A modal window titled 'Add contact' is open in the center, allowing the user to add a new contact. The modal contains the following fields:

- Name**: A text input field.
- Type**: A dropdown menu with 'client' selected.
- Company**: A text input field.
- Email**: A text input field.
- Phone**: A text input field.
- Postal address**: A text input field.
- Street address**: A text input field.
- VAT number**: A text input field.
- Company registration no.**: A text input field.
- Account / customer code**: A dropdown menu with 'optional' selected.
- Payment terms (days)**: A dropdown menu with 'default' selected.
- Notes**: A text input field.

At the bottom of the modal are 'Cancel' and 'Save' buttons. The background interface shows a sidebar with navigation options like 'Dashboard', 'Sales', 'Expenses', 'People', 'Accounting', 'Planning', and 'Workspace'. The main list of contacts includes entries like 'Cape Cabling Supplies', 'CloudSoft Licensing', 'Dr Anke Botha', 'Fatima Isaacs', 'Highveld IT Distributors', 'Johan Pretorius', 'Karoo Courier Services', 'Lerato Mokoena', and 'Lindiwe Dube'.

Adding a contact.

You can also add a customer straight from the quote or invoice editor — type the new name and choose **Add "..."** as a new customer — or from the **Create** button at the top of the screen (**Customer** or **Supplier**).

TIP

Fill in the payment terms. When you invoice this customer, the due date is worked out from their terms automatically, and the customer's email and address are filled in on every document.

A contact's details and history

Click a contact to open their page on the side of the screen. At the top are quick buttons — **New invoice**, **New quote**, **Record payment**, **Statement** and **Edit** (the sales buttons appear for customers only). Three figures summarise the relationship: **Invoiced** (issued invoices), **Open invoices** (awaiting payment) and **You spent** (linked expenses).

Below are three tabs:

- **Documents** — their quotes, invoices and credit notes with date, amount and status. Click one to open it.
- **Transactions** — payments and expenses in your cashbook linked to this contact.
- **Details** — type, email, phone, company, VAT number, address and notes.

The screenshot displays the ORYX Business interface. On the left is a sidebar with navigation menus for SALES, EXPENSES, PEOPLE, ACCOUNTING, PLANNING, and WORKSPACE. The main area is titled 'Customers & suppliers' and shows a list of contacts. The contact 'Lerato Mokoena' (Bluegum Café) is selected, opening a detailed view on the right. This view includes quick action buttons (New invoice, New quote, Record payment, Statement, Edit), summary cards for Invoiced, Open invoices, and You spent, and three tabs: Documents, Transactions, and Details. The Documents tab is active, showing a table of documents with columns for Document, Date, Amount, and Status.

Document	Date	Amount	Status
INV-0006 Invoice	23 Sept 2026	R 11,554.05	Unpaid
DEMO-QUO-0001 Quote	23 Aug 2026	R 14,892.50	Sent
DEMO-CN-0001 Credit note	23 Sept 2026	R 517.50	Sent
DEMO-INV-0034 Invoice	19 Sept 2026	R 5,462.50	Paid
DEMO-INV-0024 Invoice	30 Jul 2026	R 24,725.00	Paid
DEMO-INV-0014 Invoice	10 Jun 2026	R 14,950.00	Paid
DEMO-INV-0004 Invoice	21 Apr 2026	R 14,950.00	Overdue

A customer's page with their documents and payments.

Changing and archiving a contact

How to: archive a contact you no longer deal with

- 1 In the menu, open **Sales** → **Customers & suppliers**.
- 2 Open the contact's ... menu and choose **Edit**.
- 3 Click **Archive** at the bottom of the window.
- 4 Confirm. The contact disappears from your lists and pickers.

Archiving does not delete anything: the contact's documents and payments stay linked to them. To change details instead, make your changes in the same **Edit** window and click **Save**.

Importing contacts from another system

Moving from Xero, Zoho Books or Sage One? Export your contacts there and import them in one go. Any other CSV or Excel file with a Name column works too.

How to: import customers and suppliers

- 1 Export your contacts — in Xero: **Contacts** → **Export**; in Zoho Books: **Contacts** → ... → **Export**; in Sage One: **Customers / Suppliers** → **Export**.
- 2 In the menu, open **Sales** → **Customers & suppliers** and click **Import**.
- 3 Drop the file in the box, or click the box to choose it.
- 4 Under **Rows without a type become**, choose **Customers**, **Suppliers** or **Customers & suppliers**.
- 5 Tick **Update contacts that already exist** if the file should update contacts you already have.
- 6 Check the preview: which rows are new, which will be updated (and what changes), which are skipped and why, and any columns that are not imported.
- 7 Click **Import ... contact(s)**.

Nothing is saved until you click **Import**. Changed your mind? Open **Import** again, expand **Previous imports** and click **Undo** next to the import. Contacts it created are removed (unless they have been used since) and contacts it updated are put back as they were.

GOOD TO KNOW

Your customers and suppliers are one list for the whole organisation, even if you keep books for more than one business.

TIP

Suppliers are used when you receive stock (Inventory) and when you capture bills. Customers are used on quotes, invoices, job cards and recurring invoices.

Inventory

Inventory keeps the products and services you sell: their prices, how many you have, where they are and what they are worth. Stock comes in when you receive it and goes out automatically when you issue an invoice, so your counts stay right without extra work.

The Inventory screen

In the menu, open **Sales** → **Inventory**. The page has three tabs: **Products**, **Stock movements** and **Stock takes**. On the Products tab, three cards sum up your stock:

- **Products** — how many products you have, split into stocked items and services / non-stock items.
- **Stock value at cost** — what your stock on hand is worth, using the moving average cost.
- **Low stock** — how many items are at or below their reorder level. Click the card to list them.

The product list has the tabs **All**, **Stock items**, **Services & non-stock** and **Low stock**, a search box and a **Find a serial number** box. The buttons at the top right are **Receive stock**, **New product** and **Inventory settings** (the gear).

Inventory
Products and services you sell, what is on hand and what it is worth.

Products | Stock movements | Stock takes

Products
10
7 stocked · 3 service / non-stock

Stock value at cost
R 122,684.14
Moving average cost

Low stock
0
At or below the reorder level

All | Stock items | Services & non-stock | Low stock

Search name, SKU, barcode or category

Find a serial number

Product	Type	On hand	Avg cost	Stock value	Selling price
Business laptop 14" (i5, 16 GB, 512 GB SSD) LAP-14 · Hardware · Kalahari Tech Solutions (Pty) Ltd	Stock item	6 ea	R 11,242.86	R 67,457.14	R 14,899.00
Cat6 network cable (per metre) CAT6-M · Hardware · Kalahari Tech Solutions (Pty) Ltd	Stock item	883 m	R 5.86	R 5,177.00	R 14.50
Managed network switch 24-port SW-24 · Hardware · Kalahari Tech Solutions (Pty) Ltd	Stock item	5 ea	R 3,120.00	R 15,600.00	R 4,599.00
Microsoft 365 Business licence (month) M365-BUS · Services · Kalahari Tech Solutions (Pty) Ltd	Non-stock	—	—	—	R 395.00
On-site support (per hour) SVC-ONS · Services · Kalahari Tech Solutions (Pty) Ltd	Service	—	—	—	R 850.00
Remote support (per hour) SVC-REM · Services · Kalahari Tech Solutions (Pty) Ltd	Service	—	—	—	R 650.00
Rugged phone X5 Serials	Stock item	1 ea	R 2 500.00	R 2 500.00	R 3 999.00

The Inventory product list with stock value and low-stock cards.

Column	What it shows
Product	Name, with SKU, barcode and category underneath. Serial-tracked products show a Serials badge.

Type	Stock item, Service or Non-stock.
On hand	How many you have, in the product's unit. Shown in red with At reorder level when it is low.
Avg cost	The average cost per unit of the stock you hold.
Stock value	On hand × average cost.
Selling price	The price excluding VAT that is used on quotes and invoices.

TIP

The search box works with a barcode scanner: scan a barcode (or type an exact SKU) and press

Enter to open that product.

Products and services

There are three kinds of product:

- **Stock item** — counted, with a cost. Selling it takes it out of stock.
- **Service** — labour, call-outs and fees. Only a price is kept.
- **Non-stock** — things you sell but do not count.

How to: add a product

- 1 In the menu, open **Sales** → **Inventory** and click **New product**.
- 2 Choose the **Product type**: **Stock item**, **Service** or **Non-stock**.
- 3 Type the **Name**. Leave **SKU** blank to have one created for you, and scan or type the **Barcode** if it has one.
- 4 Add a **Category** and the **Unit** (ea, m, kg, l, box, pack, hour...).
- 5 Enter the **Selling price excl. VAT (R)** — the price including VAT is shown next to it — and choose the **VAT** setting.
- 6 For a stock item, enter the **Cost price excl. VAT (R)** and the **Opening quantity** you have now (and the **Location** if you have more than one).
- 7 Optionally set a **Reorder level** and tick **Track serial numbers** if every unit has its own serial.
- 8 Click **Create product**.

New product

PRODUCT TYPE

☒ **Stock item**
Counted, with a cost

☐ **Service**
Labour, call-outs, fees

☐ **Non-stock**
Sold, but not counted

Business
Kalahari Tech Solutions (Pty) Ltd

BASIC DETAILS

Name
e.g. Copper pipe 15mm

SKU (optional, created for you)
Automatic

Barcode (optional, scan it)

Category
e.g. Plumbing

Unit
ea

PRICING

Selling price excl. VAT (R)
0.00

VAT
Default for the document

Cost price excl. VAT (R) (per unit)
0.00

INVENTORY

Opening quantity
0

Location
Menlyn shop

Adding a new product.

Every SKU and barcode must be unique within a business. The **VAT** setting can be **Default for the document**, **Standard 15%**, **Zero-rated 0%** or **Exempt**; it is used on the invoice line when you pick the product. Under **Additional information** you can keep **Notes** such as a supplier code.

Click a product to open its own page: **On hand**, **Stock value** and **Selling price** (with your margin), stock **By location**, its **Serial numbers**, its recent **Movements** and notes. The buttons there are **Edit**, **Receive**, **± Adjust / write off**, **Move between locations** and **Archive**. Archiving hides the product from lists and pickers; its history stays.

GOOD TO KNOW

If you use Point of sale, extra till details — the shelf price including VAT, variants such as size or colour, extra barcodes and a picture — are set under **Point of sale** → **Products**. Names, stock and costs stay here in Inventory.

Receiving stock

How to: receive a delivery from a supplier

- 1 In the menu, open **Sales** → **Inventory** and click **Receive stock**.
- 2 Choose the **Supplier** and type their invoice or delivery note number under **Supplier invoice / delivery note**.
- 3 Check the **Date received** and choose **Into location**.
- 4 In **Add products**, type or scan each product's barcode, SKU or name and press **Enter**. Scanning the same item again adds one more.
- 5 Check the **Qty** and the **Cost / unit (R)** on each line (the cost starts at the current average).
- 6 For serial-tracked products, scan or type each serial number — the quantity follows the number of serials.
- 7 Click **Receive**.

The summary shows the total cost excluding VAT. If a product is not on file yet, click **New product** in the same window; receiving opens again afterwards with the new product available.

Stock value and average cost

Stock is valued at its **moving average cost**. Each delivery you receive at a new cost updates the average; stock going out is valued at the average at that moment. That is why the average cost on a product can change after you receive stock, and why the **Stock value at cost** card always matches what is on hand.

How invoices take stock out

- Quotes and draft invoices never touch stock.
- When an invoice is issued (created, emailed or sent by WhatsApp), each stock item on it is taken out of stock at your default location, at the average cost.
- If there is not enough stock, the invoice is not issued and you see a message such as "Not enough ... at Main".
- If an issued invoice is set back to draft or cancelled, exactly what it took out goes back in.
- A credit note with **back in stock** ticked brings the goods back, at what they cost when they were sold.

Services and non-stock items are never counted.

Serial numbers

For a product with **Track serial numbers** on, every unit has its own serial number. You enter the serials when you receive the stock, and again on the invoice when you sell it — an invoice cannot be issued without them. To trace one unit, type its serial in the **Find a serial number** box and press **Enter**: you see

which product it is, whether it is in stock or sold, where it is, and its full history with links to the invoices.

GOOD TO KNOW

Serial-tracked products always move in whole units and can never go below zero.

Adjustments and write-offs

How to: write off damaged stock

- 1 In the menu, open **Sales** → **Inventory** and open the product.
- 2 Click **± Adjust / write off**.
- 3 Choose **Remove (damaged, lost, own use)**, or **Add (found, correction)** for stock that turned up.
- 4 Choose the **Location** and enter the **Quantity** (for serial-tracked products, pick or type the serial numbers).
- 5 Type the **Reason** — for example Damaged, Lost / stolen, Own use, Found, Correction, Expired or Sample. A reason is required.
- 6 When adding stock, you can enter a **Cost per unit (R)**; leave it blank to use the average.
- 7 Click **Save adjustment**.

Stock locations and transfers

A location can be a shop, a store room or a vehicle. With only one location you never have to think about it: **Main** is created the first time stock comes in.

How to: add a location and move stock to it

- 1 In the menu, open **Sales** → **Inventory** and click **Inventory settings** (the gear).
- 2 Under **Stock locations**, type a name such as "Bakkie 1" and click **Add**. Use **Make default** to choose the location invoices take stock from, and untick **active** to retire one.
- 3 Click **Done**, then open the product you want to move.
- 4 Click **Move between locations**.
- 5 Choose **From** and **To**, enter the **Quantity** (or pick the serial numbers) and an optional **Note**.
- 6 Click **Move**.

Owners and admins also see a rule in Inventory settings: **Allow selling more than is on hand (stock goes negative until received)**. Off is safer — an invoice that would oversell is refused.

Stock takes (stock counts)

The screenshot shows the ORYX Business application interface. On the left is a sidebar menu with categories: SALES (Quotes & invoices, Debtors, Customers & suppliers, Inventory, Point of sale, Bookings, Job cards), EXPENSES (Receipts & bills, Supplier bills, Bank inbox, Cashbook), PEOPLE (Payroll), ACCOUNTING (Accountant's area, Projects & analysis, VAT returns), PLANNING (Budgets, Recurring, Debts, Trackers & loans, Insights), and WORKSPACE (Documents, Reports, Tasks). The main area is titled 'Inventory' with a subtitle 'Products and services you sell, what is on hand and what it is worth.' and a '+ New stock take' button. Below this are tabs for 'Products', 'Stock movements', and 'Stock takes'. The 'Stock takes' tab is active, showing a table with columns: #, Location, Started, Counted, and Status. One entry is visible: #1, Menlyn shop, Started 2026-10-02 - Thandi Mokoena, Counted 6 of 6, and Status Posted. At the top right of the main area are search and filter options. At the bottom right is a user profile icon.

#	Location	Started	Counted	Status
1	Menlyn shop	2026-10-02 - Thandi Mokoena	6 of 6	Posted

Stock takes: start a count, scan what is on the shelf, then post the differences.

How to: do a stock take

- 1 In the menu, open **Sales** → **Inventory**, click the **Stock takes** tab and click **New stock take**.
- 2 Choose the **Location** and click **Start counting**. Every stock product is listed with what is expected.
- 3 Scan each item's barcode or SKU in the scan box — every scan counts one. Or type the count in the **Counted** column. For serial-tracked items, scan each serial.
- 4 Leave a line blank if you did not count it; it is not changed.
- 5 Use **Differences only** to check what does not match, and **Save progress** to carry on later.
- 6 Click **Post differences** and confirm. Stock is adjusted to what you counted.

Cancel stock take closes it without adjusting anything. Posted stock takes stay in the list for reference.

Stock movements

The **Stock movements** tab is the full record of every change: **Opening stock, Received, Sold, Returned, Adjusted, Stock take, Moved out / Moved in** and reversals. Each line shows the date, product, location, quantity, value and reference (with a link to the invoice or credit note), and who did it. Filter by kind of movement and by date.

TIP

Set a reorder level on the items you never want to run out of, then check the **Low stock** card before you order from your suppliers.

Job cards

Job cards are work orders for jobs you do on site or in the workshop. Each card holds the customer, the site, the labour and materials, before-and-after photos and the customer's signature — and when the work is done, one click turns it into an invoice.

The Job cards screen

In the menu, open **Sales** → **Job cards**. The list shows every job with its number and title, the customer (and who it is assigned to), the scheduled date, the total and the status. A job with photos or a signature shows how many photos it has and **signed off**. Use the tabs to see jobs by status — **All**, **New**, **Scheduled**, **In progress**, **Done** and **Invoiced** — and the search box to find a job by number, title, customer or contractor.

Job cards

Work orders with labour, materials, site photos and a sign-off — then one click to an invoice.

Search in ORYX Business (/) All All entities + Create ? TM

+ New job

All New Scheduled In progress Done Invoiced

Search job number, title, customer or cc

Job #	Customer	Scheduled	Total	Status
JOB-0003 Wi-Fi dead spots in the warehouse · Kalahari Tech Solutions (Pty) Ltd	Mountain View Guesthouse Thabo Nkosi	05 Oct 2026	R 2,932.50	Scheduled
JOB-0006 Printer setup — cancelled by customer · Kalahari Tech Solutions (Pty) Ltd	Highveld Auto Spares Thabo Nkosi	02 Oct 2026	R 977.50	Cancelled
JOB-0002 Laptop not booting — diagnose and repair · Kalahari Tech Solutions (Pty) Ltd	Greenleaf Property Managers Thabo Nkosi	02 Oct 2026	R 1,495.00	In progress
JOB-0001 Office network upgrade — new switch and cabling · Kalahari Tech Solutions (Pty) Ltd	Seaside Dental Practice Thabo Nkosi	20 Sept 2026	R 7,532.50	Done
JOB-0005 Email migration to Microsoft 365 · Kalahari Tech Solutions (Pty) Ltd	Cape Fresh Produce Thabo Nkosi	12 Sept 2026	R 5,980.00	Invoiced
JOB-0004 Server room UPS replacement · Kalahari Tech Solutions (Pty) Ltd	Vusi Electrical Thabo Nkosi	—	R 4,771.35	New

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The Job cards list with the status tabs.

Each row's ... menu offers **Open**, **Print or PDF**, **Convert to invoice** (or **View invoice** once it has been invoiced), **Change status** and **Delete**.

Creating a job card

How to: create a job card

- 1 In the menu, open **Sales** → **Job cards** and click **New job**.
- 2 Choose the **Business** (if you have more than one) and the **Scheduled date**.
- 3 Type a **Job title**, for example "Geyser replacement — 12 Oak Ave".
- 4 Under **Customer (CRM)**, pick the customer. Their name, phone, email and address fill in any empty fields; you can also type the **Customer name**, **Phone** and **Email** by hand.
- 5 Fill in **Assigned to** (the contractor or team), the **Site address** and the **Work description**.
- 6 Under **Labour & materials**, add a line for each item: choose **Labour** or **Material**, type the description, the quantity and the **Unit (R)**. Click **Add line** for more.
- 7 Tick **Add VAT (15%) on top** if you charge VAT. The subtotal, VAT and total update as you type.
- 8 Click **Create job**. The job is numbered automatically and opens again so you can add photos and a sign-off.

Job cards

Work orders with

All New S

Q Search job

Job T

JOB-0003
Wi-Fi dead spots

JOB-0006
Printer setup — C

JOB-0002
Laptop not booting

JOB-0001
Office network up

JOB-0005
Email migration to

JOB-0004
Server room UPS

New job card

Business: Thabo — Personal

Scheduled date: yyyy/mm/dd

Job title: e.g. Geyser replacement — 12 Oak Ave

Customer (CRM): — link a CRM contact —

Customer name: Phone:

Email: Assigned to: Contractor / team

Site address:

Work description:

LABOUR & MATERIALS

Type	Description	Qty	Unit (R)	Line
Labour	Description	1	0.00	— X

+ Add line

☐ Add VAT (15%) on top

ct 2026 R 2,932.50 Scheduled

ct 2026 R 977.50 Cancelled

ct 2026 R 1,495.00 In progress

ept 2026 R 7,532.50 Done

ept 2026 R 5,980.00 Invoiced

R 4,771.35 New

A job card with labour and material lines.

Site photos and the customer's sign-off

Photos and the signature are saved the moment you add them — you do not have to click Save for them.

How to: add photos and get a sign-off

- 1 In the menu, open **Sales** → **Job cards** and open the job.
- 2 Under **Site photos**, choose **Photo**, **Before** or **After** as the label, then click **Add photo**. On a phone or tablet you can take the picture straight away.
- 3 Repeat for each photo. Click a photo to see it full size, or the small red cross to remove it.
- 4 When the work is done, hand the device to the customer. Under **Customer sign-off**, they sign in the white box with a finger, pen or mouse.
- 5 Type their name in **Signed by (name)** and click **Save sign-off**. Use **Clear** to start the signature again.

The saved signature shows who signed and when. **Replace signature** removes it so a new one can be captured.

TIP

Take a "Before" photo when you arrive and an "After" photo when you finish. Both print on the job card, which helps if a customer later queries the work.

Tracking progress

Move a job through its statuses as the work progresses: **New**, **Scheduled**, **In progress**, **Done**, **Invoiced** or **Cancelled**. Open the row's ... menu and choose the new status under **Change status**.

Printing a job card

Choose **Print** or **PDF** in the row's menu, or **Print / PDF** in the open job. The job card opens in a new tab with the print window. It shows your logo and business details, the customer and site, the job number, scheduled date, who it is assigned to and the status, the work description, the labour and material lines with totals, the site photos and the customer's signature. Choose **Save as PDF** as the printer to keep a PDF.

Turning a job card into an invoice

How to: invoice a finished job

- 1 In the menu, open **Sales** → **Job cards**.
- 2 Open the job's ... menu and choose **Convert to invoice**.
- 3 Click **Convert** to confirm.
- 4 A new draft invoice is created and you are taken to **Quotes & invoices**. Open the invoice from the **Drafts** tab.
- 5 Check the lines, set the due date, and click **Create invoice** to issue it.

The labour and material lines become invoice lines, the job number is used as the invoice reference, and a note "From job ..." is added. The job's status changes to **Invoiced**, and its menu now offers **View invoice**. A job can only be invoiced once, and it needs at least one labour or material line.

Deleting a job card

Choose **Delete** in the row's menu and confirm. Its photos and signature are removed too, and this cannot be undone. A job that has been invoiced keeps its invoice.

GOOD TO KNOW

Job card lines are plain text and prices — they are not linked to Inventory products, so a job card does not move stock. Pick products on the invoice if you need stock to come out.

Recurring

Some things happen every month: rent, salaries, subscriptions, a retainer you bill a client. Set them up once and ORYX Business takes care of them — recurring items post themselves to your cashbook, and recurring invoices are created for your customers on schedule.

There are two kinds of recurring work, in two places:

- **Recurring items (Planning → Recurring)** — money in or out of a bank account on the same day every month, posted to the cashbook.
- **Recurring invoices (Sales → Quotes & invoices, Recurring tab)** — an invoice to a customer every month, every 3 months or every year.

Recurring items

In the menu, open **Planning → Recurring**. Three cards show **Money in each month** and **Money out each month** (active items only) and how many **Items** you have, with the number paused. The list shows each item's **Day**, **Description** (with the bank account), **Category**, **Amount** and **Status** (Active or Paused). Use the tabs **All**, **Money out** and **Money in** to narrow it down.

Recurring
Rent, salaries, subscriptions and other monthly items — posted to the cashbook automatically on their day.

↓ Money in each month
R 9,500.00
active items

↑ Money out each month
R 21,979.00
active items

↔ Items
4
0 paused

Day ↑	Description ↑	Category ↑	Amount ↑	Status
1st	Office rent — Menlyn Kalahari Tech Solutions (Pty) Ltd - FNB Business Cheque	Rent	-R 18,500.00	Active
3rd	Fibre 500 Mbps Kalahari Tech Solutions (Pty) Ltd - FNB Business Cheque	Phone & Internet	-R 1,199.00	Active
5th	Microsoft 365 licences Kalahari Tech Solutions (Pty) Ltd - FNB Business Cheque	Software & Subscriptions	-R 2,280.00	Active
25th	Managed IT retainer — Karoo Clinic Kalahari Tech Solutions (Pty) Ltd - FNB Business Cheque	Services	+R 9,500.00	Active

Recurring items: what goes in and out every month.

How to: add a monthly expense such as rent

- 1 In the menu, open **Planning** → **Recurring** and click **Add recurring item**.
- 2 Choose **Expense** (or **Income** for money that comes in every month).
- 3 Enter the **Amount (R)** and the **Day of month** it goes off (1 to 28).
- 4 Choose the bank **Account** and the **Category**.
- 5 Type a **Description**, for example "Office rent".
- 6 Leave **Active** ticked and click **Save**.

From then on, the item is posted to the cashbook automatically each month once its day has come. To change an item, click it (or choose **Edit** in its ... menu). Untick **Active** to pause it without losing it. **Delete** removes the item; transactions it already posted stay in the cashbook.

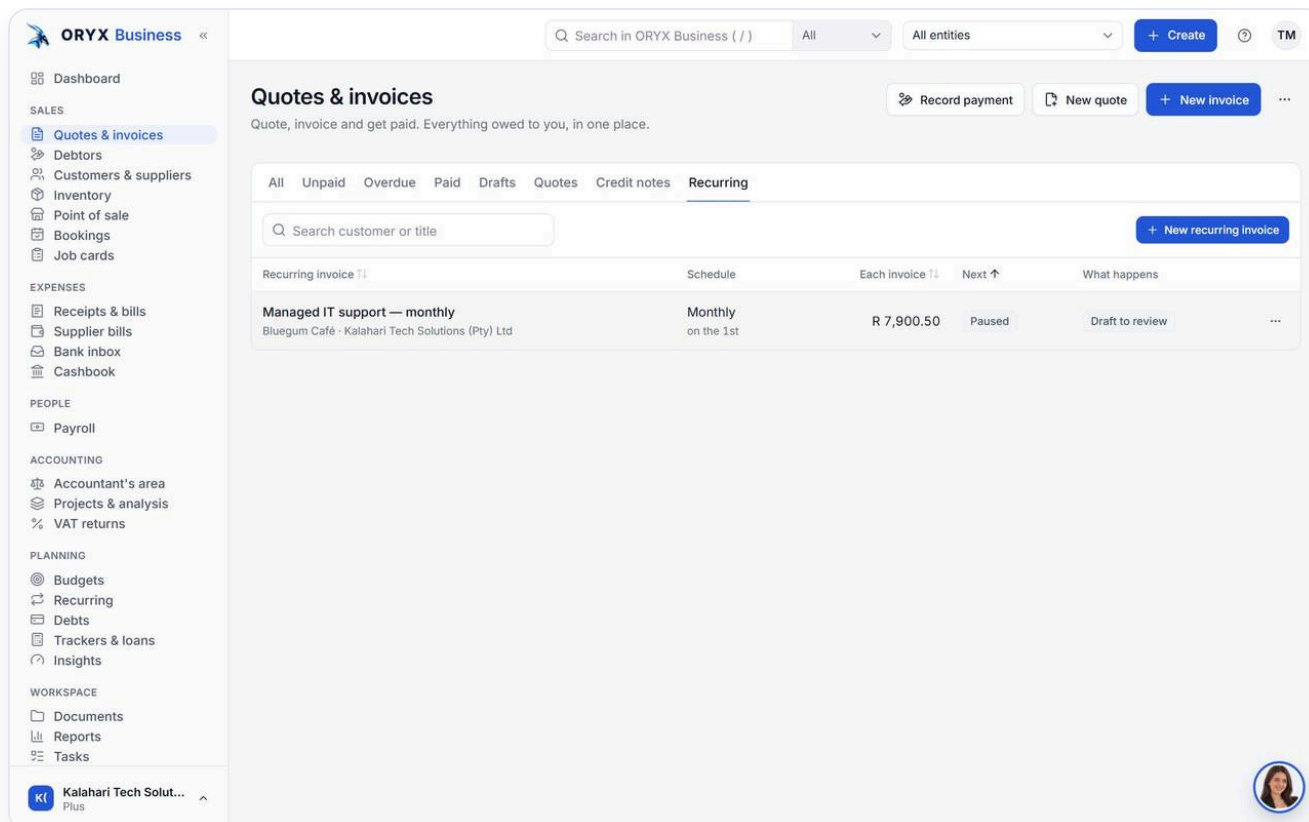
TIP

If an amount changes — a rent increase, a new subscription price — edit the item before its day comes round, and the new amount is used from then on.

Recurring invoices

A recurring invoice is a template: the customer, the lines and a schedule. Each time it is due, a real invoice is made from it with your normal numbering. Use it for retainers, rent you charge, service contracts or subscriptions.

In the menu, open **Sales** → **Quotes & invoices** and click the **Recurring** tab. The list shows each schedule with its customer and how many invoices it has created, the **Schedule** (how often, on which day, and until when), **Each invoice** (the amount), the **Next** date (or **Paused / Ended**) and **What happens** to each new invoice.



The Recurring tab under Quotes & invoices.

How to: set up a monthly invoice for a customer

- 1 In the menu, open **Sales** → **Quotes & invoices**, click the **Recurring** tab and click **New recurring invoice**.
- 2 Choose the **Customer**. **Invoice to**, **Email**, **Address** and the payment terms fill in for you. Give the schedule a name under **Name for this schedule** — only you see it.
- 3 Choose **How often**: **Monthly**, **Every 3 months** or **Yearly**.
- 4 Set **First invoice on** (the first invoice's date; later ones fall on the same day of the month), the **Payment terms** and, if it should stop, the date it **Ends**.
- 5 Add the lines you bill each time: description, quantity, unit price, discount and VAT. Click **Add item** for more. **Each invoice** shows the total.
- 6 Add a **Reference** (such as a contract or PO number) and **Notes** — both print on every invoice.
- 7 Under **When an invoice is created**, choose what should happen (see below). For emailing, check the **Email message**.
- 8 Leave **Active** ticked and click **Start schedule**.

ORYX Business

Search in ORYX Business (/)
 All

+ Create

Quotes & invoices

Quote, invoice and get paid. Everything owed to you, in one place.

🔄 Outstanding

R 253,270.10

15 unpaid invoices

⚠️ Overdue

R 173,293.35

11 invoices past due

✅ Paid - last 30 days

R 38,379.20

6 invoices

Record payment

New quote

+ New invoice

↑ Import invoices

✉ Customer statements

↻ New recurring invoice

Open card R 20,€ 2 awaiting a reply

All Unpaid 15 Overdue 11 Paid Drafts 3 Quotes Credit notes Recurring

Search number, customer or reference

Number ↕	Customer ↕	Issued ↓	Due ↕	Amount ↕	Balance due ↕	Status ↕	
INV-0009 <small>Invoice · Kalahari Tech Solutions (Pty) Ltd</small>	Greenleaf Property Managers	09 Oct 2026	—	R 34,267.70	R 34,267.70	Unpaid	...
MEN1-000004 <small>Invoice · Kalahari Tech Solutions (Pty) Ltd</small>	Cash sale	08 Oct 2026	08 Oct 2026	R 9,197.70	R 0.00	Paid	...
MEN1-000003 <small>Invoice · Kalahari Tech Solutions (Pty) Ltd</small>	Cash sale	08 Oct 2026	08 Oct 2026	R 16.68	R 0.00	Paid	...
MEN1-000002 <small>Invoice · Kalahari Tech Solutions (Pty) Ltd</small>	Cash sale	08 Oct 2026	08 Oct 2026	R 1,343.43	R 0.00	Paid	...
CN-0001 <small>Credit note · Kalahari Tech Solutions (Pty) Ltd</small>	Cash sale	08 Oct 2026	—	R 16.68	—	Sent	...
MEN1-000001 <small>Invoice · Kalahari Tech Solutions (Pty) Ltd</small>	Cash sale	08 Oct 2026	08 Oct 2026	R 17,183.89	R 0.00	Paid	...
INV-0008 <small>Invoice · Kalahari Tech Solutions (Pty) Ltd</small>	Acme Holdings (Pty) Ltd	08 Oct 2026	06 Nov 2026	R 28,175.00	R 28,175.00	Unpaid	...

Kalahari Tech Sol... Plus

What happens when an invoice is created

GOOD TO KNOW

Changing, running and stopping a schedule

CAREFUL

If you set the first invoice date in the past, the invoices for every period since then are created right away. You are asked to confirm before this happens.

TIP

Choose a day from 1 to 28 for the invoice date. A later day is moved to the 28th, so the invoice arrives at the same time every month, February included.

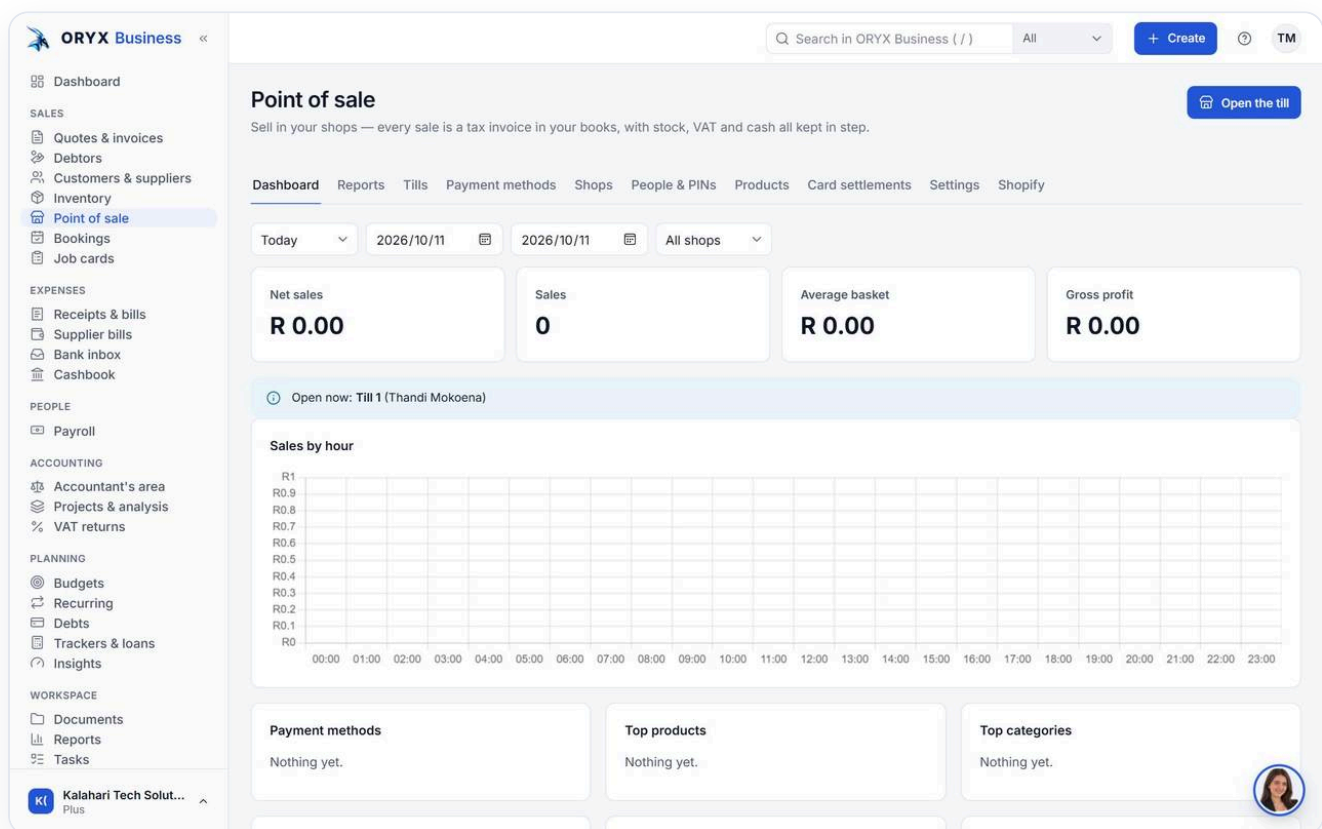
Point of sale

Sell over the counter in your shops. Every till sale is a tax invoice in your books, so stock, VAT, cash and your debtors all stay in step without extra work. Owners and administrators set it up in the back office; cashiers, supervisors and managers work at the till.

The point of sale has two parts:

- **The back office** — in the menu under **Sales** → **Point of sale**. Here you set up shops, tills, payment methods and people, and you see the dashboard and reports.
- **The till** — a full-screen selling page that works with a touch screen, a mouse, a keyboard and a USB or Bluetooth barcode scanner. Open it with the **Open the till** button at the top of the back office, or from the till's own bookmarked address.

The back office



The point of sale dashboard: today's sales compared with yesterday, sales by hour, payment methods and top products.

Across the top you see the tabs **Dashboard**, **Reports**, **Tills**, **Payment methods**, **Shops**, **People & PINs**, **Products**, **Card settlements**, **Settings** and **Shopify**. If you keep more than one set of books, a drop-down next to **Open the till** chooses the business.

- Owners and administrators see every tab.

- Supervisors and POS managers see the **Dashboard**, **Reports** and **Card settlements**.
- Cashiers see only a **Ready to sell** panel with an **Open the till** button.

Dashboard

Choose a period (**Today**, **Yesterday**, **Last 7 days**, **This month** or **Custom**) and, with more than one shop, a shop. You see **Net sales**, the number of **Sales**, the **Average basket** and **Gross profit** (or the VAT in sales). Each figure is compared with the period before. Below them are **Sales by hour**, **Payment methods**, **Top products**, **Top categories**, **Cashiers** and **Low stock**. A blue bar shows which tills are open right now. A yellow bar warns you about cash-up differences.

First-time set-up

The first time an owner or administrator opens **Point of sale**, a short set-up form appears: **Set up the point of sale**. It has four steps, and you can change everything later.

How to: set up the point of sale for the first time

- 1 In the menu, open **Sales** → **Point of sale**.
- 2 Under **1. Your shop**, choose an existing stock location, or type a **Shop name** for a new one. Fill in the **Till name**, the **Address on the slip** and the **Phone on the slip**. You can also enter a **Receipt number prefix** (for example CEN1). Each till numbers its own tax invoices, such as CEN1-000001.
- 3 Under **2. How customers pay**, tick the payment methods you accept, and choose the bank account that EFT payments go into.
- 4 Under **3. Who works the till**, give each staff member a POS role: **Cashier**, **Supervisor** or **POS manager**. Choose **No till** for people who don't sell.
- 5 Under **4. The slip**, type the messages for the top and bottom of the slip and your **Returns policy**, and choose a **Paper width** of 80 mm or 58 mm.
- 6 Click **Set up the point of sale**.

Tills

The **Tills** tab lists each till with its shop, the next slip number, whether it is **Open** (and by whom) or **Closed**, and its drawer account. Click a till to change it, or click **New till** to add one. Your plan may limit how many tills you can have, and the page tells you that limit.

In the till editor you set:

- the **Name**, the **Shop** and the **Slip number prefix**. The prefix can't be changed once the till has sold something.
- **Payment methods on this till**. If you tick none, the till offers all of them.
- **Who may use it**. If you tick nobody, everyone with a POS role may use it.
- **Hardware**: the **Receipt paper** width, **Print the slip automatically after every sale**, the **Cash drawer** setting, and an optional **Hardware bridge**. The bridge is a small program on the till computer that handles silent printing, the drawer and a card machine.
- **In use**. Untick it to switch a till off. You must close the till session first.

Till address. Each till has its own private web address, made from a long random code. Nobody can guess it, and it still needs a sign-in. Click **Copy** and bookmark the address on the till computer. If the link was ever shared outside the business, tick **Give this till a new address when saving (the old link stops working)** and click **Save**.

How to: add a till and bookmark it on the shop computer

- 1 In the menu, open **Sales** → **Point of sale** and click the **Tills** tab.
- 2 Click **New till**. Give it a **Name** and choose its **Shop**.
- 3 Choose the payment methods, the people and the hardware settings, then click **Save**.
- 4 Click the new till in the list. Under **Till address**, click **Copy**.
- 5 On the till computer, paste the address into the browser and bookmark it. Anyone with a POS role for this till can now sign in there.

Payment methods

The kinds of payment method are **Cash**, **Card**, **EFT**, **Instant EFT**, **On account**, **Store credit**, **Voucher / gift card** and **Other**. Cash always goes into each till's own drawer. Card and instant-EFT takings wait in a clearing account until the provider pays them out. EFT usually goes straight to the bank. Click **New method**, or click an existing one. Then set the **Name on the till and slip** and where the money **Lands in**. Tick **The cashier must type a reference (slip / authorisation number)** if you want the cashier to record the card slip number every time.

GOOD TO KNOW

Card machines and instant-EFT providers are not linked directly yet. The cashier confirms that the card machine approved the payment and types the slip or authorisation number.

Shops

A shop is a stock location. The till sells from that shop's stock, and the shop's address and phone number print on the slip. If you use branch codes under Projects & analysis, choose a **Branch code**. Every sale in that shop is then tagged for branch reports.

People & PINs

Owners and administrators can do everything at the till. Everyone else needs a POS role. A table on this tab shows exactly what each role may do:

	Cashier	Supervisor	POS manager
Sell, park, quotes, customers	Yes	Yes	Yes
Discount without approval (default limits)	5%	15%	100%
Change a price, sell on account, returns, cash in / out, cash-up of another till	—	Yes	Yes

Refund by another method, go over a credit limit, sell below cost	—	—	Yes
See cost and profit	—	—	Yes

When something needs more than the cashier's role, a supervisor or manager types their PIN at the till, and the approval is recorded with their name.

How to: give a staff member a POS role and a PIN

- 1 First make sure the person is a user of your organisation. If they are not, invite them under **Settings → Users**.
- 2 In the menu, open **Sales → Point of sale** and click the **People & PINs** tab.
- 3 Next to the person, choose a POS role. It saves straight away.
- 4 Click **Set PIN** (or **Change PIN**). Type a PIN of 4 to 8 digits.
- 5 Give the PIN to the person privately. They can change it later at the till under **Menu → My PIN**.

Products

Product names, stock and costs are kept under Inventory. This tab holds only the till settings for each product. Search for a product and click it to set:

- **Shelf price, VAT included.** Leave it empty to use the normal selling price plus VAT, or set a round shelf price like R 99.99. The VAT is worked out from it exactly.
- **A favourite tile on the till.** Favourites appear first, under ★ **Favourites**.
- **Variant of** and **Variant label** (for example Large / Red). A product with variants shows as one tile, and tapping it asks which variant.
- **Extra barcodes**, one per line, for old packaging, supplier codes or pack sizes.
- A **Picture** for the tile.

Settings

The **Settings** tab sets the rules for every till in this business:

- **Name for walk-in customers.**
- **A tax invoice needs the customer's details above** an amount you choose (R 5 000 by default, in line with the VAT Act).
- What happens when someone is **Selling more than is in stock**, **Selling below cost**, makes **Sales on account**, goes **Over the credit limit**, or gives a **Refund by another method than the customer paid**.
- Whether **Offline sales** are allowed.
- The **Discount limits without approval** for each role.
- The bank account that **Cash in comes from / drops go to**.
- The slip: messages, returns policy, paper width, **Print the logo**, **Show VAT per rate** and **Offer to email the slip**.

Card settlements

When your card machine or instant-EFT provider pays out, record the payout here. The top of the page shows how much is still waiting in each clearing account. Under **Record a payout**, choose **From** (the clearing account) and **Into** (the bank). Then fill in the **Date it reached the bank**, the **Takings settled (gross)**, the **Fee (excl. VAT)** and the **VAT on the fee**. The VAT is filled in at 15% for you. The page shows the amount **Paid into the bank**. Click **Record**. The takings move to the bank, and the fee is recorded as an expense with its VAT.

Reports

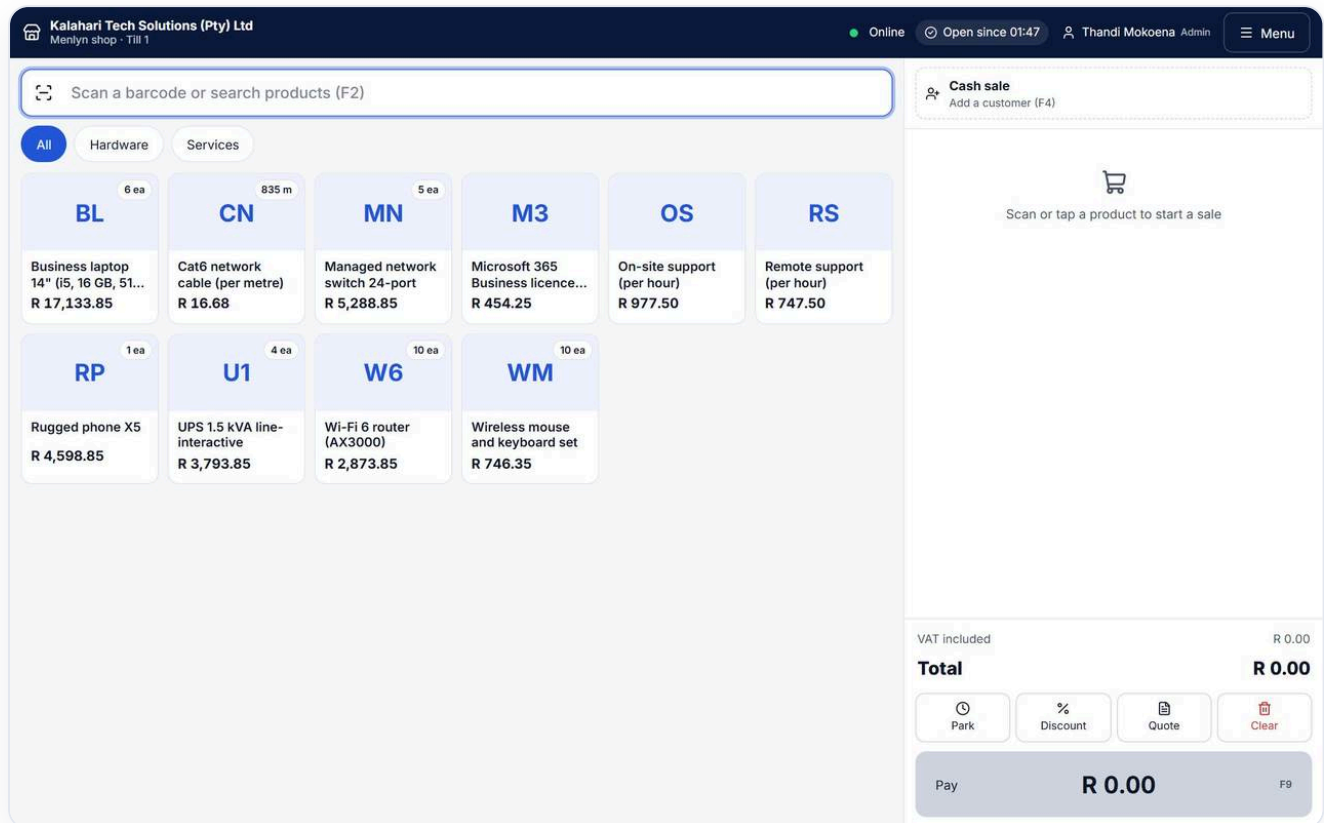
The **Reports** tab lists 21 reports down the side. They include **Sales summary**, **Sales detail**, **Product sales**, **Category sales**, **Gross profit**, **VAT**, **Payment methods**, **Cashiers**, **Tills**, **Hourly sales**, **Daily sales**, **Discounts**, **Voids and overrides**, **Returns and refunds**, **Cash-ups and variances**, **Cash in and out**, **Stock on hand**, **Low stock**, **Stock movement** and **Customer purchases**. Set **From** and **To**, and the **Shop**, **Till** or **Cashier** if you want to narrow it down, then click **Run**. Download any report as **CSV**, **Excel** or **PDF**. In **Cash-ups and variances**, click a Z number to see that till session in full: float, sales, payment methods, expected and counted cash, what was banked, and every cash movement with who approved it.

Shopify

If you also sell online through Shopify, the **Shopify** tab keeps the two in step. The page explains how to create an app in Shopify and which access scopes to give it. Paste the **Store address** and the **Admin API access token**, choose which of your stock Shopify sells from, and click **Connect**. Once connected:

- **Import products** brings your Shopify products in once. Importing again updates them and never duplicates them.
- Stock levels are sent to Shopify after every sale, return and receipt. **Send all stock levels now** sends them immediately.
- If you tick **Turn paid Shopify orders into invoices here (and take the stock)** and add the webhook address shown in Shopify with its signing secret, each paid online order becomes an invoice here.
- **Disconnect** stops the stock sync. The links between products are kept for when you reconnect.

The till



The till: search and product tiles on the left, the customer, basket and Pay button on the right.

Opening the till with a float

Open the till's bookmarked address, or click **Open the till** in the back office. If you may use more than one till, you first see **Choose a till**. When the till is closed, a window asks you to count the cash in the drawer. It also tells you how much the till was left with at the last cash-up.

How to: open the till at the start of the day

- 1 Open the till's address on the shop computer and sign in.
- 2 Count the cash in the drawer.
- 3 Type the amount under **Opening float**.
- 4 If you added cash from the bank or safe on purpose, tick **The difference was brought from the bank (not a mistake)**. Otherwise the difference is recorded as cash over or short.
- 5 Click **Open the till**. The top bar now shows **Open since** and the time.

What you see

- **Top bar:** the business, the shop and the till, **Online** or **Offline**, how many sales are waiting to be sent, who is signed in and their role, and the **Menu** button.
- **Left:** the search box (**Scan a barcode or search products (F2)**), the category buttons (**★ Favourites**, **All** and your categories), and the product tiles with price and stock. Stock running low is marked.

- **Right:** the customer (the walk-in name until you add one), the basket, the totals with the VAT included, and the buttons **Park**, **Discount**, **Quote**, **Clear** and the large **Pay** button.

Ringling up a sale

- **Tap a tile** to add one of that product. Tap again to add another.
- **Scan a barcode.** Anything you type or scan goes into the search box, and pressing **Enter** adds the product. To add several at once, type the quantity, a star and the code, for example **3*6001234567890**.
- **Search** by name, code or category. If nothing matches, **Sell as an open item** lets you type a description, a price including VAT and the VAT type. A typed price may need a supervisor's approval.
- Use the **-** and **+** buttons on a basket line to change the quantity. Tap the line itself to change the **Quantity** or the **Price each (incl. VAT)**, to give a discount on that line (as a % or in rand), or to **Remove** it.
- Press **F4** or tap the customer to find a customer by name, phone, email or account number, or to add a **New customer**. The till warns you if the customer has overdue amounts.

Scanning serial numbers

For products tracked by serial number, the till asks for the exact unit being sold. Scan the serial number into the search box or into the **Serial numbers** window. Without a scanner, tap a unit from the **In stock at this shop** list. Each serial number adds one unit, so the quantity always equals the number of serials. The till refuses a unit that was already sold, written off or is at another shop, and tells you why. It also refuses the same serial twice in one sale. You can't take payment until every serial-tracked line has its serial numbers.

Discounts and supervisor approval

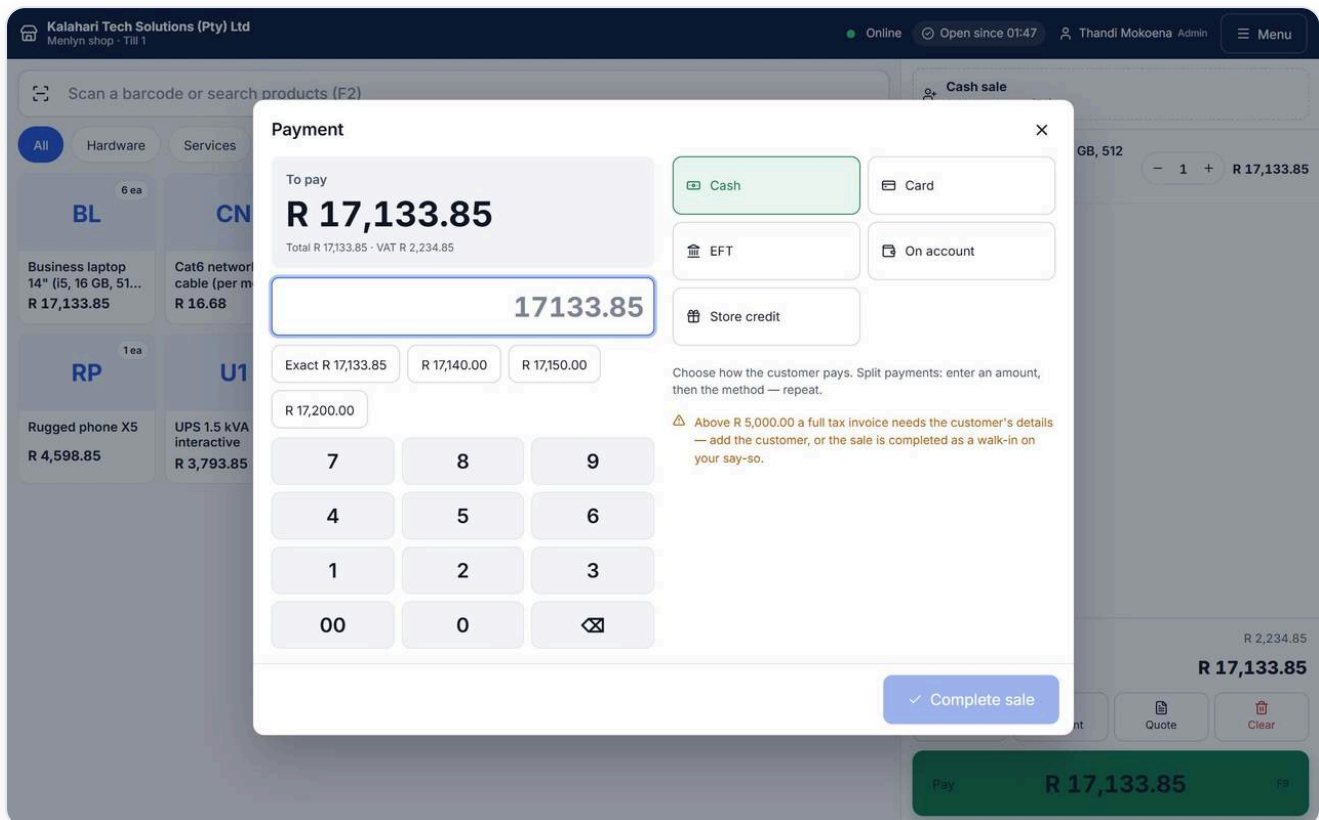
Give a discount on one line by tapping the line. For the whole sale, tap **Discount**, then choose 5%, 10%, 15% or 20%, or type a percentage or a rand amount, and tap **Apply**. A whole-sale discount is spread over the lines, so every line and its VAT stay exact.

Up to your own discount limit, nothing more happens. If a discount is above your limit, or you changed a price, sold below cost or did something else your role doesn't allow, an **Approval needed** window appears when you continue. The supervisor or manager taps their name under **Approved by**, types their **PIN** and taps **Approve**. Someone else has to approve; you can't approve your own request.

CAREFUL

After five wrong PINs, that PIN is locked for 15 minutes.

Taking payment, split payments and change



The payment window: the amount still to pay, quick cash amounts, the keypad and the payment methods.

How to: take payment and give change

- 1 Tap **Pay** or press **F9**. The **Payment** window shows what is **To pay**.
- 2 For cash, tap a quick amount such as **Exact R 120.00** or the next note up, or type the amount the customer gave you and tap **Cash**.
- 3 For card or EFT, tap the method. Type the slip or authorisation number when asked.
- 4 To split the payment, type part of the amount, tap a method, and repeat until nothing is left to pay. Remove a payment with its **x**.
- 5 Check the **Change** shown at the bottom, then tap **Complete sale**.
- 6 The **Sale complete** window shows the change in large print and the slip. Tap **Print**, or type an email address and tap **Email**. Then tap **New sale**.

- Change comes only from cash. A card, EFT or other method can't be more than what is due.
- **On account** needs a customer, and sales on account must be switched on. The sale stays open in Debtors.
- **Store credit** needs a customer with enough credit.
- Above the tax-invoice amount (R 5 000 by default), the till asks you to add the customer's details. Or you can choose **Complete as walk-in**.

Parking a sale and selling a quote

Tap **Park** (F8) to put a sale aside, for example while a customer fetches something. Give it a name and serve the next customer. To bring it back, open **Menu** → **Parked sales** and tap it. Tap **Quote** to **Save this basket as a quote**, or to find an open quote by number or customer and load it into the basket to sell.

Returns, refunds and exchanges

Returns need a supervisor or manager, so a cashier is asked for approval. A return becomes a credit note linked to the original sale, and the stock goes back on the shelf.

How to: do a return or refund

- 1 Tap **Menu** → **Return / exchange**.
- 2 Type the slip number (or its last digits) or the customer's name, and tap the sale. Leave the box empty to see today's sales at this till.
- 3 Under **Return**, enter how many of each item come back. Untick **Back in stock** for damaged items. For serial-tracked items, scan the serials coming back.
- 4 Choose a reason, such as **Faulty**, **Wrong size** or **Changed mind**, or type your own. The reason prints on the credit note.
- 5 Under **The customer gets**, choose **Their money back**, **Store credit on their account** or **An exchange now**.
- 6 For money back, choose the method under **Refund by**. A method marked * is not the one the customer paid with, so it needs a manager.
- 7 Tap **Do the return** and print the slip. For an exchange, the credit is waiting in the basket: ring up the new items and tap **Pay**.

If the customer still owed money on that sale, the return reduces what they owe first.

Cash in, cash out and the drawer

Under **Menu** → **Cash in / out**, choose **Cash out**, **Cash in**, **Bank drop** or **Till expense**. Type the amount and the reason. For a till expense, choose the expense category and tick **There is a valid tax invoice — claim the VAT** if there is one. Cashiers need a supervisor's approval. **Open the drawer (no sale)** asks for a reason and also needs a supervisor. Both are logged.

Reprinting a slip

Menu → **Reprint the last receipt** prints the last sale again. **Find a receipt** lets you search by slip number or customer and tap **Show** to view, print or email that slip. Reprints are logged.

The Menu

Tap **Menu** at the top right for: **Return / exchange**, **Parked sales**, **Quotes**, **Reprint the last receipt**, **Find a receipt**, **Cash in / out**, **Open the drawer (no sale)**, **X report**, **Cash-up (Z)** and close, **My PIN**, **Offline sales**, **Refresh products**, **Lock / switch cashier**, **Sign out**, **Another till** and **Back office**.

Changing cashier

The till stays open with its float and cash when cashiers change, and every sale records whoever rang it up. Finish, park or clear the current sale first. There are two ways to hand over:

- **Lock / switch cashier** locks the till. The next cashier taps their name, types their PIN and taps **Unlock**. Only people with a POS role and a PIN who may use this till are listed. Someone signed in with a PIN can only use the till. To reach the back office they choose **Back office (sign in)** and sign in with their email and password.
- **Sign out** is an ordinary sign-out. The next person signs in with their own email and password and comes straight back to this till.

GOOD TO KNOW

Owners and administrators never appear on the PIN list. They always sign in with their password.

Working offline

If the internet drops, the top bar shows **Offline**. You can keep selling for cash and card or EFT at shelf prices, within your own discount limit. These sales get a provisional slip marked "Pending". They are sent automatically when the connection is back, then numbered and taken out of stock. The top bar shows how many sales are waiting to be sent. Account sales, store credit, returns, quotes, price changes and discounts above your limit all need the connection. If the server refuses an offline sale for good (for example, the product was deleted meanwhile), it is kept under **Menu → Offline sales**. A supervisor captures it again and then taps **Dismiss**. You can't cash up while offline sales are still waiting.

X report and cash-up (Z)

An **X report** shows the till so far without closing it: the opening float, sales, returns, discounts, each payment method, the cash movements and the cash **Expected in the drawer**. You can print it.

How to: cash up and close the till

- 1 Finish, park or clear the current sale.
- 2 Tap **Menu → Cash-up (Z) and close**. The till's figures appear on the left.
- 3 Count the drawer and type how many of each note and coin you have. The **Counted cash** fills in by itself, or you can type the total.
- 4 Check the line below it: **Exactly right**, or over or short by an amount.
- 5 Under **Leave as float for tomorrow**, enter the cash that stays in the drawer. Everything above it is recorded as banked.
- 6 Add any **Notes** and tap **Close the till**. If the count differs, confirm with **Close anyway**. The difference is recorded as cash over or short.
- 7 The **Z report** appears. Tap **Print** and keep it with the banking.

Cashiers can cash up the till they opened. Supervisors and managers can cash up any till. A closed till session can't be changed afterwards.

Keyboard keys

Key	What it does
F2	Go to the search / scan box
F4	Choose or add a customer
F8	Park the sale (or show parked sales when the basket is empty)
F9	Pay
Esc	Close the open window

TIP

Any USB or Bluetooth barcode scanner that types like a keyboard works. Set it to send **Enter** after each code. Most cash drawers plug into the receipt printer and open when a slip prints.

TIP

For silent printing, run the browser in kiosk printing mode with the receipt printer as the default printer. Then tick **Print the slip automatically after every sale** on the till.

GOOD TO KNOW

A till receipt from a VAT vendor is an abridged tax invoice. Above R 5 000, the customer's name, address and VAT number are needed. That's why the till asks for them.

Bookings

An appointment diary for any business that books time: salons, consultants, trainers, tutors, repair shops. Your team books appointments in the diary, and customers can book themselves on your own online booking page. Reminders, deposits and invoices are all handled for you.

Open it in the menu under **Sales** → **Bookings**. The tabs across the top are **Today**, **Calendar**, **Services**, **Staff**, **Reports** and **Settings**. Which tabs you see depends on your bookings role (see [Who sees what](#) below). In this chapter, **Settings** means the Settings tab inside Bookings, not the main Settings page.

Today

The Bookings home page: today's appointments, bookings waiting for confirmation and the set-up checklist.

The home page shows four cards: **Today** (appointments today), **Next 7 days**, **Waiting for you** (bookings to confirm) and **This month** (booked value, appointments and no-shows). Below the cards you see:

- **Waiting for confirmation** — online bookings that arrived as Pending, each with **Confirm** and **Decline** buttons.
- Today's appointments with their time, customer, service, staff member and status. A **Deposit due** label shows where a deposit hasn't been paid yet. Click a row to open the appointment.
- When your booking page is switched on, its link with **Copy link** and **Open**.

The buttons at the top are **Block time**, **Walk-in** and **New appointment**.

Getting set up

Until everything is in place, a **Get set up** checklist shows six steps, each with a **Do it** button:

1. Set your opening hours.
2. Add your services.
3. Add your team.
4. Choose who does what.
5. Choose the business book for invoices.
6. Switch on your booking page.

Services

The **Services** tab lists what customers can book, with the time it takes, the price, the deposit, who offers it and whether it is **Bookable** online or **Staff only**. Use the **Active** and **Archived** tabs, and **Categories** to group services on your booking page (for example Hair, Nails, Consultations).

How to: add a service

- 1 In the menu, open **Sales** → **Bookings** and click the **Services** tab.
- 2 Click **New service**. Type the **Name** and choose a **Category** and **Colour**.
- 3 Type a **Description (shown to customers)** and set how long it **Takes (minutes)**.
- 4 If you need time before or after, set **Prep before (min)** and **Clean-up after (min)**. If only one can happen at a time (for example there is one machine or room), set **Max at the same time**.
- 5 Choose the **Price type** (**Fixed price**, **From (starting price)**, **Free** or **On request (not shown)**) and type the **Amount (R)**.
- 6 Choose a **Deposit**: **No deposit**, **Fixed amount**, **Percentage** or **Full payment upfront**, and its value.
- 7 Under **Offered by**, tick the people who do this service.
- 8 Leave **Customers can book this online** on, or switch it off for a staff-only service. Click **Save**.

Staff and resources

The **Staff** tab holds the people appointments are booked with. It can also hold a room, a piece of equipment or a vehicle that gets booked. The list shows each one's services, whether they work the business hours or **Own hours**, and the user login linked to them. Your plan may limit how many bookable staff you can have.

How to: add a staff member and their working hours

- 1 In the menu, open **Sales** → **Bookings**, click the **Staff** tab and then **Add**.
- 2 Type the **Name** and choose the **Kind** (**Staff member**, **Room**, **Equipment**, **Vehicle** or **Other**). Add a **Title**, **Colour**, **Email**, **Phone** and a **Short bio (shown to customers)**.
- 3 Under **ORYX Business login**, choose the person's own login so that they see their own diary. Also give them the **Staff member** role under the Bookings **Settings** → **Access** tab.
- 4 Set **Appointments at the same time**. Use more than 1 for classes, group sessions or a room with several chairs.
- 5 Under **Services**, tick what they do.
- 6 Under **Working hours**, choose **Business hours**, or **Own hours** to switch each day on or off, with times and an optional break.
- 7 Choose whether **Customers can choose them online** and whether to **Email them about their bookings**, then click **Save**.

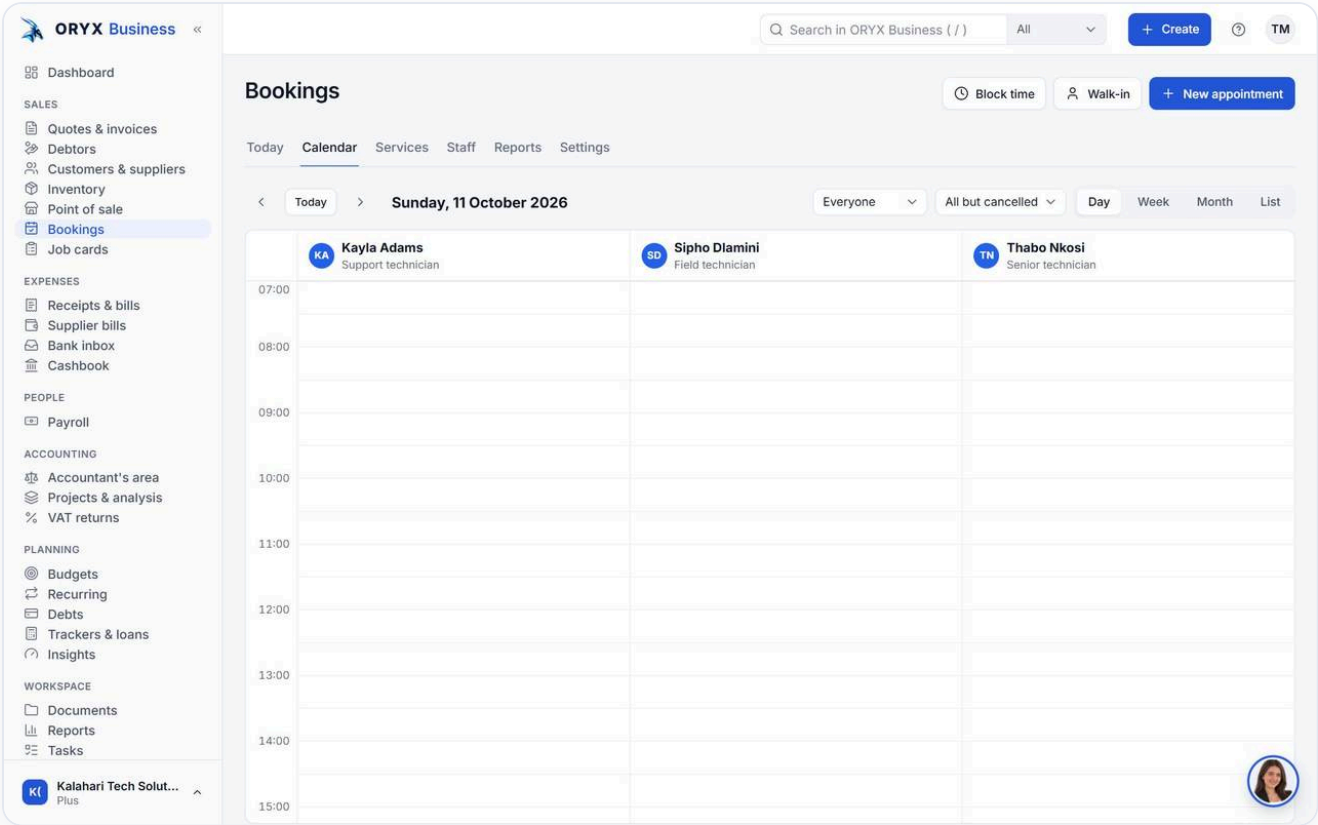
When you open an existing staff member, you can also upload a **Photo**. You see their **Time off coming up**, with a **Block time** button.

Opening hours, closed days and time off

Under **Settings** → **Hours & closures** you set the business **Opening hours** for each day, with an optional break. Staff without their own hours work these hours. Switch on **Closed on South African public holidays** if you close on them. Add **Closed days** such as stocktake or the year-end break, with a reason that customers see. A business with more than one branch can add a **Location**.

To take someone out of the diary for a while, click **Block time**. Choose **For** (a person, or **The whole business (closed)**) and the **Kind**: **Blocked time**, **Leave / away**, **Break** or **Internal event / training**. Set the **From** and **Until** times, or tick **Whole days**. If appointments are already booked in that time, you get a list of them so you can move or cancel them. To remove a block, click it in the calendar and choose **Remove this block**.

The calendar (diary)



The calendar in day view: one column per staff member, coloured by service.

The **Calendar** tab has four views: **Day** (one column per staff member), **Week** (one column per day), **Month** and **List**. Use **Previous**, **Today** and **Next**, or click the date to jump to another one. Filter by staff member and by status. By default every status is shown except cancelled appointments. Blocked time and leave show as shaded blocks, and a line marks the time now. In the month view, click a day to open it.

Making an appointment

The screenshot displays the ORYX Business software interface. On the left is a sidebar menu with categories: SALES (Quotes & invoices, Debtors, Customers & suppliers, Inventory, Point of sale, Bookings, Job cards), EXPENSES (Receipts & bills, Supplier bills, Bank inbox, Cashbook), PEOPLE (Payroll), ACCOUNTING (Accountant's area, Projects & analysis, VAT returns), PLANNING (Budgets, Recurring, Debts, Trackers & loans, Insights), and WORKSPACE (Documents, Reports, Tasks). The main area shows a 'Bookings' calendar for Sunday, 11 October 2026, with staff members Kayla Adams (Support technician) and Sipho Dlamini (Field technician) listed. A 'New appointment' form is open on the right, containing fields for Customer (search by name, phone or email), Name, Mobile, Email, Service (Laptop health check - 1 h - R 650), With (Anyone available), Date (2026/10/11), Time, Booked by (Phone), Status (Confirmed), and Price (R) (650.00). The form also includes a 'Cancel' button and a 'Book' button.

A new appointment: pick the customer, service and person, then one of the free times.

How to: book an appointment for a customer

- 1 In the menu, open **Sales** → **Bookings**. Click **New appointment**, or click an empty spot in the calendar.
- 2 Under **Customer**, search by name, phone or email and pick the customer. Or choose **+ New customer** and type their **Name**, **Mobile** and **Email**.
- 3 Choose the **Service** and **With** (a staff member, or **Anyone available**).
- 4 Choose the **Date**. Free times appear as buttons below. Click one, or type any **Time**.
- 5 Under **Details**, choose how it was **Booked by** (**Phone**, **Walk-in**, **WhatsApp** or **In person / other**) and the **Status**.
- 6 Change the **Price (R)** if needed. Add a **Customer's note** or an **Internal note** (only your team sees it).
- 7 Leave **Email the customer a confirmation on**, and click **Book**.

Walk-in opens the same form, set to now, with the status **Arrived (here now)**. Customers are matched by email or mobile number. If no match is found, a new customer is created in your Customers list, so you never end up with a second list.

GOOD TO KNOW

If the time is not free, the booking is refused. Managers (and owners and administrators) are asked whether to **Book anyway**. The override is recorded in the booking history.

Working with an appointment

Click an appointment to open it. You see the date and time, service, staff member, customer (with phone, WhatsApp and email links) and the customer's note. You can:

- Change its status with the buttons **Confirm**, **Check in**, **Start**, **Complete**, **No-show** or **Cancel**. You can also undo a step: **Restore**, **Undo check-in** or **Reopen**.
- **Move** it to another time or person.
- Under **Money**: see the price, the deposit, what was received and the balance. Use **Take payment** for a deposit, the balance or the full payment, **Refund** a payment, or **Create invoice**.
- Save **Internal notes**.
- See the **Messages** sent and due, and **Resend confirmation**.
- Read the full **History** (who did what, when) and the **Customer history**: visits, no-shows, cancellations and amount spent.

Moving and cancelling

How to: move an appointment

- 1 In the menu, open **Sales** → **Bookings** and click the **Calendar** tab.
- 2 Drag the appointment to the new time. In the day view, you can also drag it to another person's column.
- 3 Check the details in the **Move appointment?** window and click **Move**.
- 4 Or open the appointment, click **Move**, choose the new date and time from the free times, and click **Move**.

Only Pending and Confirmed appointments can be moved. The customer is emailed about the change if they have an email address, and their reminders move with the appointment.

How to: cancel an appointment

- 1 Open the appointment from the Today page or the calendar.
- 2 Click **Cancel**.
- 3 Type the **Reason**.
- 4 Leave **Email the customer** on to tell them, or switch it off.
- 5 Click **Cancel appointment**.

CAREFUL

If the appointment was already invoiced, cancelling it doesn't cancel the invoice. You get a warning to cancel or credit the invoice under Quotes & invoices.

Payments, deposits and invoices

Under **Settings** → **Payments & invoices**, choose the **Business book** where deposits, payments and invoices for bookings are recorded. Then choose when **Invoices** are made:

- **Only when I click "Create invoice"**
- **Automatically when a booking is confirmed**
- **Automatically when an appointment is completed**

A booking is never invoiced twice. Customers pay deposits by EFT using the booking reference, or at your business. When the money arrives, record it on the appointment with **Take payment**. Choose an **Into account** to record it in the cashbook as well.

GOOD TO KNOW

Online card payments for deposits are not connected yet. The page lists them as "Not connected".

Your online booking page

Customers book themselves on your own booking page. Set it up under **Settings** → **Booking page**:

- **Take bookings online** switches the page on or off.
- The link has **Copy** and **Open** buttons. Share it on WhatsApp, Instagram or your website. **Put it on your own website** gives you code to paste into your own site.
- **What customers see**: **Headline**, **About**, **Phone**, **WhatsApp number**, **Email**, **Brand colour**, **Address**, your social media links, **Booking terms** (customers must accept them) and a **Banner picture**.

Under **Settings** → **Rules** you decide:

- **Start times every** so many minutes, the **Minimum notice**, and **Up to how far ahead (days)** customers can book.
- **I confirm each online booking myself (they arrive as Pending)**.
- **Customers may choose who they book with**.
- Whether an email address and a mobile number are required, and the **Question in the notes box**.
- For changes by customers: **Cancel online until (hours before)**, **Move online until (hours before)**, **Moves allowed online** and **Refund deposits when cancelled in time**.

What the customer does

On your booking page the customer chooses a service, then **Who would you like?** (or **Anyone available**, which gives the most times to choose from). Next they **Pick a day and time**, then fill in **Your details**. They finish with **Confirm booking**, or **Request booking** when you confirm bookings yourself. They see **You're booked!** (or **Request received**), a reference, any deposit due with your payment instructions, and the buttons **Add to calendar** and **View or change booking**.

The customer's manage link

The confirmation email has a button that opens the customer's own booking page. There they can **Change date or time** or **Cancel booking** (with an optional reason), within the time limits you set under Rules. After that, the page tells them the booking can no longer be changed online, and they must contact you.

Reminders and messages

Under **Settings** → **Messages**:

- **Channels** shows whether email is ready. SMS and WhatsApp show as "Not configured".
- **Reminder hours before (up to three)**: for example **24, 2** sends a reminder a day before and two hours before. Leave it empty for no reminders.
- **Thank-you message (hours after)**: 0 means none.
- **Message wording**: edit the subject and text of each message, or switch it off. The messages are **Booking confirmed**, **Booking request received**, **Booking moved**, **Booking cancelled**, **Reminder**, **Thank you / follow-up**, **Staff: new booking** and **Staff: booking changed**. Use placeholders such as **{{first_name}}**, **{{date}}** and **{{time}}**. **Back to the default** restores the original wording.

Reminders are checked again just before they are sent. A cancelled or moved appointment doesn't get the old reminder.

Reports

The **Reports** tab has eight reports: **Appointments**, **By staff member**, **By service**, **Where bookings come from**, **Cancellations and no-shows**, **Revenue by day**, **Customers** and **Staff utilisation**. Choose dates (or **This month**, **Last month**, **This year**) and a staff member. Download any report as **CSV**, **Excel** or **PDF**.

Who sees what

Owners and administrators can do everything in Bookings. Give other members a bookings role on the Bookings **Settings** tab, under **Access**. The change applies at their next sign-in.

Role	What they can do
Bookings manager	All appointments, staff, services, hours, payments and reports. Not the booking-page settings or who has access.
Receptionist	Books, moves, checks in and cancels every appointment and takes payments. No setup or reports.
Staff member	Sees and manages only the appointments booked with them, and their own time off.

A staff member sees only **Today** and **Calendar**, showing their own diary. They can book, move and block time only for themselves. Their login must be linked to their staff record (see **Staff** above).

TIP

Use **Max at the same time** on a service when you have one machine or one treatment room. Then two staff members can never both book it for the same time.

TIP

Staff with **Own hours** can work outside your opening hours, for example a trainer with 06:00 sessions.

GOOD TO KNOW

Two people can never get the same slot. Every booking checks the time again at the moment it is saved.

Payroll

Pay your people correctly and on time. Payroll works out PAYE, UIF and SDL with the current SARS tax tables, issues payslips, tells you what to pay SARS on the EMP201, and makes the EMP501 file for the IRP5 and IT3(a) certificates at year end. It is for owners and the staff they trust with salaries.

Open it in the menu under **People** → **Payroll**. The tabs are **Overview**, **Employees**, **Leave**, **Pay runs**, **Reports**, **Settings** and **Audit trail**. If you keep more than one business, a drop-down at the top chooses which employer you are working on.

Who can use payroll

Payroll is private. Salaries, bank details and pay runs are visible only to people with a payroll role, and that includes owners and administrators. Payroll roles are separate from organisation roles. The first time, the owner sees **Payroll is private** and a **Manage payroll access** button, and can give themselves a role too. Only the owner or a payroll administrator can give or remove payroll roles. Each change asks for a reason and is recorded.

Payroll role	What they can do
Payroll administrator	Everything in payroll, including settings, reopening finalised runs and who has payroll access.
Payroll processor	Maintains employees and pay, captures inputs and calculates runs. Cannot approve or finalise.
Payroll approver	Reviews and approves runs, finalises them and marks them paid.
HR manager	Employee records and leave. Does not see salaries or bank details.
Payroll auditor	Read-only: runs, reports and the audit trail.

How to: give someone payroll access

- 1 In the menu, open **People** → **Payroll**, click the **Settings** tab and then **Access**. (The first time, click **Manage payroll access** instead.)
- 2 Find the person in the list.
- 3 Under **Payroll role**, choose their role, or **No payroll access** to remove it.
- 4 Type the reason (it is kept in the audit trail) and click **Give access**.

Setting up payroll

Until payroll is set up, the **Overview** tab shows **Set up payroll** with three steps: **Employer details**, **Pay schedule** and **Employees**. The set-up guide takes you through employer, pay schedule, leave, employees, year to date and ready.

How to: set up payroll for the first time

- 1 In the menu, open **People** → **Payroll** and click **Set up** next to **Employer details**.
- 2 Type your **PAYE reference** (starts with 7), **UIF reference** (starts with U) and **SDL reference** (starts with L), and the address for payslips. Tick whether you pay the Skills Development Levy (payroll over R500 000 a year) and contribute to UIF. Click **Save and continue**.
- 3 Click **Add pay schedule**. Choose how often you pay: **Monthly**, **Every two weeks** or **Weekly**. For monthly pay, choose the pay day (for example the 25th, or **Last day of the month**). The next pay periods are previewed. Click **Save**.
- 4 Check the leave types and click **Looks good**. They are set up with the Basic Conditions of Employment Act minimums.
- 5 Add your employees one by one, or click **Import from a file** to load a spreadsheet or an export from your previous payroll system.
- 6 If you start part-way through the tax year (which begins on 1 March), click **Import year-to-date amounts**. Otherwise choose **No, we start fresh**.
- 7 Click **Start the first pay run**.

The rest of the employer details are under **Settings** → **Employer**:

- The UIF reference for Labour / uFiling.
- What shows on payslips: trading name, a note at the bottom, and **Show employer contributions (UIF, SDL, pension) on payslips**.
- The contact person, physical address and SIC7 code that SARS needs for the EMP501.
- The Employment Tax Incentive.
- The **Four-eyes** control: a pay run must be approved by someone other than the person who calculated it.

Employees

ORYX Business

Dashboard

SALES

Quotes & invoices

Debtors

Customers & suppliers

Inventory

Point of sale

Bookings

Job cards

EXPENSES

Receipts & bills

Supplier bills

Bank inbox

Cashbook

PEOPLE

Payroll

ACCOUNTING

Accountant's area

Projects & analysis

VAT returns

PLANNING

Budgets

Recurring

Debts

Trackers & loans

Insights

WORKSPACE

Documents

Reports

Tasks

KI Kalahari Tech Solut... Plus

Search in ORYX Business (/)

All

+ Create

TM

Employees

Everyone you pay, with their pay, tax and bank details.

Imports Import Add employee

Overview Employees Leave Pay runs Reports Settings Audit trail

Active Former employees

Search name, number or job

All records

Employee	Department	Paid	Pay	Status
Kayla Adams EMP004 - Junior support technician	Technical	Monthly — 25th	R 9,800.00	Active
Sipho Dlamini EMP003 - Field technician	Technical	Monthly — 25th	R 16,500.00	Active
Thabo Nkosi EMP001 - Senior technician	Technical	Monthly — 25th	R 28,500.00	Active
Anika Venter EMP002 - Office manager	Administration	Monthly — 25th	R 22,000.00	Active

The employee list, with flags for missing tax numbers, bank details or ID numbers.

The **Employees** tab lists everyone with their department, pay schedule, pay and status. The **Active** and **Former employees** tabs separate current staff from people who have left. Filter to find records with **No tax number**, **No bank details** or **No ID number**. The Overview's **Needs attention** panel counts the same gaps.

How to: add an employee

- 1 In the menu, open **People** → **Payroll** and click **Add employee**.
- 2 Under **Personal details**, type the name, choose the **Identity document** and type the **ID / passport number**. The date of birth fills in from a South African ID. Add the **Income tax number** (needed for the IRP5), the email address (payslips are sent there) and the address.
- 3 Under **Employment**, set the **Start date**, **Pay schedule**, **Employment type**, department or cost centre, and the **Hours per week**. Under 24 hours a month, no UIF is deducted.
- 4 Under **Pay and tax**, choose **Salary** (and type the **Salary per pay period**) or **By the hour** (and type the **Hourly rate**). Leave **How PAYE is worked out** on **Normal (tax tables)** unless SARS issued a directive.
- 5 Under **Banking**, choose **Paid by** and enter the bank, account number, branch code, account type and account holder.
- 6 Watch the **Estimated take-home** panel on the right. It shows gross pay, PAYE, UIF, net pay and cost to company as you type.
- 7 Click **Add employee**. New employees start on the next pay run of their schedule.

When you change an existing employee, type a reason in the bar at the bottom before you click **Save changes**. The reason goes into the change history. Other parts of the **Pay and tax** section:

- **People on the medical aid**, including the employee. This gives the medical tax credit when medical aid is deducted.
- **Extra PAYE per period (R)**, if the employee asks for it.
- **Exempt from UIF**, with the reason.
- The travel allowance / company car option for at least 80% business use (20% taxed instead of 80%).
- For a tax directive: the **Directive number** and the percentage, or the PAYE amount per period.

Regular earnings and deductions

On a saved employee, **Regular earnings and deductions** holds what is paid or deducted every pay run. Click **Add item**, choose the item, type the **Amount per pay period (R)** (or hours, or a percentage of basic salary), add optional **From** and **Until** dates and a **Note** for the payslip, and click **Save**. The built-in items include:

- **Earnings**: overtime, commission, bonus / 13th cheque, travel allowance and other allowances.
- **Taxable benefits**: company car benefit and other taxable benefits.
- **Deductions**: pension fund, provident fund, retirement annuity, medical aid, garnishee order, union fees.
- **Employer contributions**: pension fund, provident fund and medical aid paid by the employer.

Each item already knows how it is taxed. To stop an item, click its bin icon. It stops from the next pay run, and past runs are not changed.

Loans, leave, documents and leaving

- **Loans and advances:** click **New loan or advance**, then enter the amount lent and how much to **Deduct per pay run (R)**. It is repaid automatically from each pay run. The menu next to a loan offers **Statement**, **Record a repayment**, **Settle on the next pay run**, **Change the instalment...** and **Write off the balance....**
- **Leave:** see the employee's balances, **Record leave**, or **Adjust** a balance (an opening balance, or a correction).
- **Documents:** **Upload** an ID copy, contract, tax directive, bank confirmation letter or medical aid certificate. They are stored privately.
- **Pay history:** every pay run the employee was in, with a link to each payslip.
- **Paid by a previous payroll system this tax year:** opening year-to-date figures for someone you took over part-way through the year.
- **More → End employment....:** choose the last day of work and the reason. The record and all pay history are kept. Next, you can add leave pay-out, notice pay and a severance benefit (with the SARS directive) to the final pay run. **Reinstate employee...** brings someone back.

Running a pay run

September 2026 • Paid

Monthly — 25th · 01 Sept – 30 Sept 2026 · paid 25 Sept 2026 · tax year 2026/27 · SARS rules 2027.1

Inputs — Review — Approved — Finalised — **5 Paid**

Finalised by Thandi Mokoena on 02 Oct 2026 · paid on 25 Sept 2026. This run is locked.

Employees	Gross pay	PAYE	UIF	SDL	Net pay	Cost to company
4	R 84,300.00	R 9,008.25	R 1,258.72	R 821.63	R 69,664.89	R 87,888.49

Employee	Gross	PAYE	UIF	Deductions	Net pay	Status
Kayla Adams EMP004	R 9,800.00	R 279.00	R 98.00	R 0.00	R 9,423.00	OK
Sipho Dlamini EMP003	R 19,000.00	R 1,845.00	R 177.12	R 0.00	R 16,977.88	OK
Thabo Nkosi EMP001	R 33,500.00	R 5,035.25	R 177.12	R 2,137.50	R 26,150.13	OK
Anika Venter EMP002	R 22,000.00	R 1,849.00	R 177.12	R 2,860.00	R 17,113.88	OK

4 paid · net R 69,664.89

A pay run: the progress steps, the totals for gross, PAYE, UIF, SDL and net pay, and one line per employee.

Each pay run moves through five steps: **Inputs**, **Review**, **Approved**, **Finalised** and **Paid**. The **Pay runs** tab lists every run with its period, pay date, number of employees, net pay and status.

How to: run payroll for the month

- 1 In the menu, open **People** → **Payroll**. On the **Overview**, click **Start pay run** next to the period (or **Continue** for one already started). Everyone on the schedule is added automatically.
- 2 Add this month's extras. Click an employee's row menu and choose **Add once-off amount** for overtime, commission, a bonus, back pay or a once-off deduction. Use **More** → **Import hours...** to load approved hours from a spreadsheet.
- 3 To skip someone this month, choose **Leave out of this run** and give the reason.
- 4 Click **Calculate**. Check the totals and the **Needs a look** tab. An employee marked **Error** can't be paid correctly until you fix the problem. **Review** means it is worth a second look.
- 5 Click a row to see that employee's payslip and **How PAYE was worked out**.
- 6 If you change anything, click **Recalculate**. Then the approver clicks **Approve**.
- 7 Click **Finalise**. The run is locked and the payslips are issued.
- 8 Pay the salaries (use **Bank file** for your bank's bulk payments). Then click **Mark as paid**, choose the date, and optionally record the net pay in the cashbook.

- **Bank file** lists each payment and anyone left out with the reason (for example, missing bank details). Choose a file format and click **Download file**.
- **More** also offers **Change pay date...** (PAYE uses the tax year of the pay date), **Journal** (a balanced payroll journal you can export to CSV or Excel), **History of this run** and **Delete this draft**.
- **Extra pay run for a finished period...** (under **Start pay run** on the Pay runs tab) pays a bonus, commission or correction after a month was finalised. PAYE, UIF and SDL are worked out on everything paid in that period, less what was already deducted.

CAREFUL

To correct a finalised run, a payroll administrator uses **More** → **Reopen pay run...** and gives a reason. Payslips already sent may no longer match. Recalculate, approve and finalise again, and send the payslips again.

Payslips

Once a run is finalised, click **Payslips** to open all payslips as one PDF. Click **Email payslips** to send each employee their own payslip as a PDF. Employees without an email address are skipped, and you are told how many. For one employee, use the row menu: **Payslip (PDF)** or **Email payslip to** The payslip shows earnings, taxable benefits, deductions (PAYE, UIF and the rest), net pay and the year to date. It can also show employer contributions and leave balances. Payslips are always rebuilt from what was actually calculated, so a payslip reprinted years later shows exactly what was paid.

PAYE, UIF and SDL

- **PAYE** uses the SARS tax tables for the tax year of the pay date, with the age rebates, the medical tax credit and retirement fund deductions. Bonuses and leave pay-outs are taxed with the bonus (annual payment) method. The Overview and **Settings** → **Tax tables** show which SARS tables are in use.

- **UIF** is 1% from the employee and 1% from the employer, up to the monthly ceiling. It doesn't apply to people working under 24 hours a month.
- **SDL** is 1% of payroll, paid by the employer when you are liable.
- The **Employment Tax Incentive**, if you switch it on under Settings, is worked out each month for qualifying employees aged 18 to 29 earning under R7 500. It reduces the PAYE you pay on the EMP201.

EMP201 (monthly)

Under **Reports** → **PAYE, UIF and SDL (EMP201)**, each month shows what is due to SARS, the due date and what was paid. Click **Record payment** on a month to see the EMP201 figures: PAYE, UIF (employee and employer), SDL and any ETI claimed. The page also warns you about pay runs in that month that are not finalised yet.

How to: submit and record the EMP201

- 1 In the menu, open **People** → **Payroll**, click the **Reports** tab and choose **PAYE, UIF and SDL (EMP201)**.
- 2 Click **Record payment** on the month.
- 3 Submit the EMP201 on SARS eFiling with these figures, and pay using the payment reference number (PRN) that eFiling gives you.
- 4 Back in payroll, fill in **Paid on** and the **Payment reference (PRN)**. You can also record the payment in the cashbook.
- 5 Click **Record payment**.

IRP5, IT3(a) and EMP501 (twice a year)

Tax certificates (EMP501)

Overview Employees Leave Pay runs **Reports** Settings Audit trail

< All reports

Twice a year SARS needs every employee's tax certificate (IRP5 or IT3(a)) and a reconciliation with your monthly EMP201s: the **interim** for March–August (due by end October) and the **annual** for the full tax year (due by end May). ORYX Business makes the import file for SARS e@syFile.

Tax year 2026/27 Interim (Mar–Aug) **Annual (Mar–Feb)**

20 things to fix before the file can be made:

- Physical address: street is missing — Payroll settings → Employer
- SIC7 code is missing — Payroll settings → Employer
- Physical address postal code (4 digits) is missing
- Physical address: suburb or city is missing
- Kayla Adams: SA ID number is missing or not valid
- Kayla Adams: residential street address is missing
- Kayla Adams: residential postal code (4 digits) is missing
- Kayla Adams: residential suburb or city is missing

> 12 more

Check:

- The PAYE reference fails the SARS check digit — please check it
- Kayla Adams: bank details incomplete — reported as not paid by EFT
- Sipho Dlamini: bank details incomplete — reported as not paid by EFT
- Thabo Nkosi: bank details incomplete — reported as not paid by EFT
- Anika Venter: bank details incomplete — reported as not paid by EFT

	On certificates	On EMP201s	Difference
PAYE	R 24,424.75	R 15,416.50	R 9,008.25
UIF	R 3,776.16	R 2,517.44	R 1,258.72

File for e@syFile

Submission

Test file (try the import first)

Download Import file

Tax certificates (EMP501): the reconciliation with your EMP201 payments and the file for e@syFile.

Under **Reports → Tax certificates (EMP501)** you prepare the **Interim (Mar–Aug)** reconciliation, due by the end of October, and the **Annual (Mar–Feb)** one, due by the end of May. Choose the tax year. You see:

- A list of things to fix before the file can be made, for example a missing tax number.
- A **Reconciliation** of the PAYE, UIF, SDL and ETI on the certificates against the EMP201 payments you recorded.
- Every employee's certificate: **IRP5**, or **IT3(a)** when no tax was deducted.

How to: make the EMP501 file for e@syFile

- 1 In the menu, open **People → Payroll**, click the **Reports** tab and click **Tax certificates (EMP501)**.
- 2 Choose the tax year and **Interim (Mar–Aug)** or **Annual (Mar–Feb)**.
- 3 Fix everything in the red list. Click an employee to open their record.
- 4 Check that the **Reconciliation** shows no differences. A difference usually means a month's EMP201 payment was not recorded.
- 5 Under **Submission**, choose **Test file (try the import first)** and click **Download import file**. Import it in e@syFile Employer and validate it.
- 6 When the test imports cleanly, download a **Live submission** file, import it, and submit through eFiling.

CAREFUL

The EMP501 file contains ID and bank numbers. Store it safely and delete copies you don't need.

Leave

The **Leave** tab has three views. **Requests** has **Waiting**, **Upcoming** and **All** tabs, with **Approve**, **Decline...** and **Cancel leave....** **Balances** shows every employee's balances. **Public holidays** lists the South African public holidays, and you can add once-off holidays such as an election day.

How to: record leave

- 1 In the menu, open **People** → **Payroll**, click the **Leave** tab and click **Record leave**.
- 2 Choose the employee and the **Type of leave**.
- 3 Choose the **First day** and the **Last day**. The **Working days** are counted for you, without weekends and public holidays. Use .5 for a half day.
- 4 Check the balance shown, add a reason if you like, leave **Approve now** on and click **Save**.

Leave builds up as pay runs are finalised. Unpaid leave is deducted from pay on the next run. Under **Settings** → **Leave types** you can change the leave types. They start with the legal minimums: 15 working days annual leave a year, 30 days sick leave per 3-year cycle and 3 days family responsibility leave a year. You may give more, but never less.

Reports and the audit trail

The **Reports** tab includes only finalised pay runs, selected by pay date. Next to the EMP501 card, the reports are **Payroll summary**, **PAYE**, **UIF and SDL (EMP201)**, **Gross to net by employee**, **Payroll detail**, **Cost to company by department**, **Earnings and deductions**, **Pay run changes**, **Tax year to date**, **Leave balances** and **Loans and advances**. Choose a tax year or your own dates, filter by department or branch, and download as **CSV**, **Excel** or **PDF**.

The **Audit trail** tab shows every change to payroll: who made it, when, what it was before and after, and why. It can't be edited or deleted.

TIP

Under **Settings** → **Accounting** you can name the payroll journal accounts and give them the codes from your accounting software, so the journal export imports cleanly.

TIP

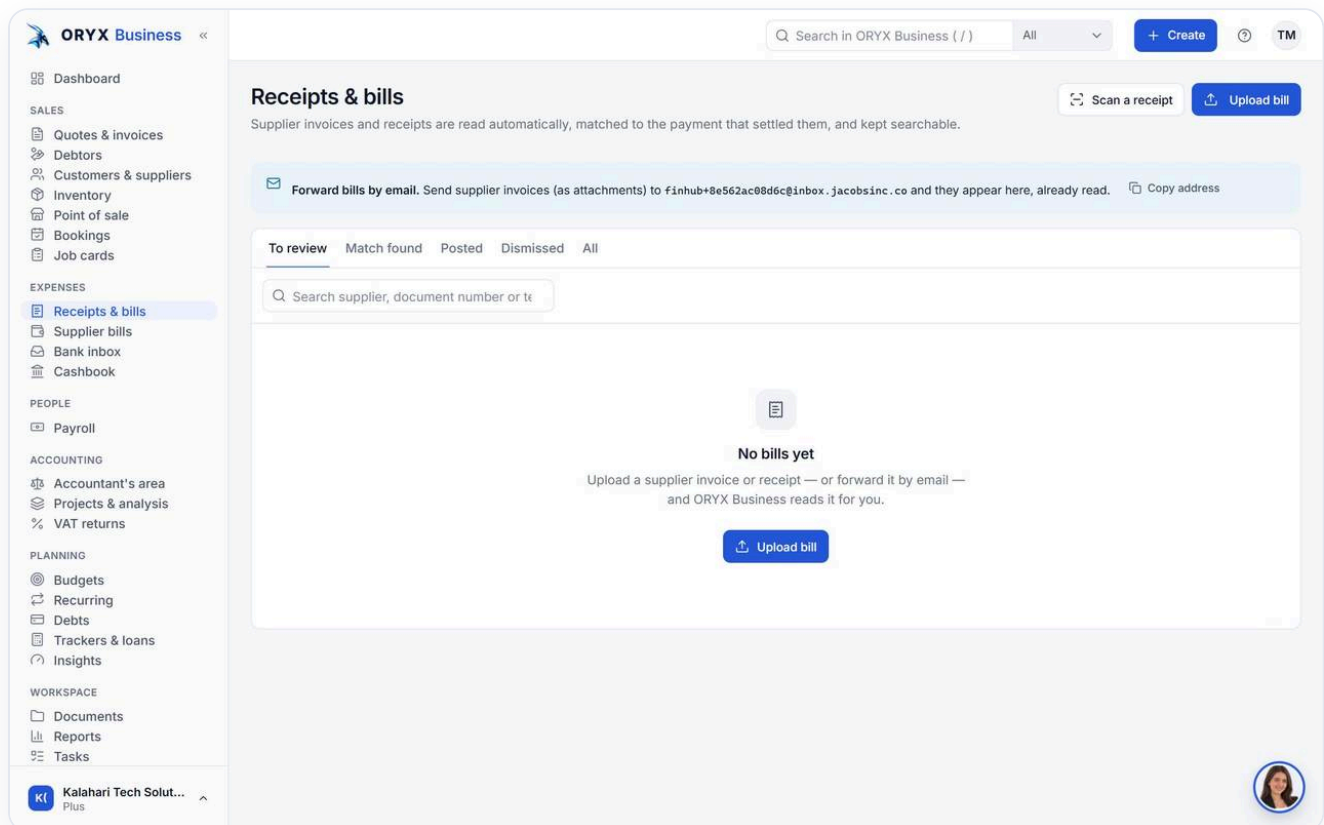
Switch on **Four-eyes** under **Settings** → **Employer** if you want a second person to check every pay run before it is approved.

GOOD TO KNOW

Every pay run records the SARS rule version it used. A finalised run always shows exactly what was calculated, even after new tax tables come in.

Receipts & bills

Receipts & bills is where the paperwork for your spending lands: supplier invoices and till slips you upload, photograph or email in. ORYX Business reads each document for you, suggests what it was for, and then lets you match it to the payment that settled it, record it as an expense, or put it on the list of supplier bills still to pay.



The Receipts & bills list, with bills waiting to be reviewed.

Two ways to capture a slip

There are two buttons at the top of the page, and they do different things:

- **Upload bill** keeps the document in this list first. It is read, you check it, and then you decide what happens to it (matched to a payment, added as an expense, or sent to Supplier bills). Use this for supplier invoices, especially ones you may not have paid yet.
- **Scan a receipt** is the quick way for something you have *already paid*, such as a fuel or hardware slip. It opens a short form, reads the photo, and saves an expense straight into your cashbook with the slip attached as a backup. It does not appear in this list.

You can also open the quick receipt form from anywhere with **Create** → **Receipt or bill** in the top bar, or with **Scan a receipt** on the Cashbook page.

What you see on the page

- **Forward bills by email** — if your organisation has email forwarding set up, a blue note shows your own forwarding address with a **Copy address** button.
- **Tabs** — **To review** (everything not yet dealt with, with a count), **Match found**, **Posted**, **Dismissed** and **All**.
- **Search** — finds bills by supplier, document number or text read from the document.
- **Columns** — **Supplier** (with the category under it), **Document** (the invoice number, and whether it was **Uploaded** or **Emailed in**), **Date**, **Amount** (with the VAT under it) and **Status**.
- A **Review** button on every bill still waiting, and a ... menu with **View document**, **Review**, **Confirm match**, **Add as expense** and **Dismiss** (or **Delete** once a bill has been dealt with).

The status badge tells you where each bill is:

Status	What it means
Needs review	The document was read; check the details and decide what to do with it.
Match found	A payment in your cashbook looks like it settled this bill. The date and amount of that payment show under the badge.
Couldn't read	No supplier or amount could be read. The file is kept; type the details in yourself.
Posted	Dealt with: linked to a payment, recorded as an expense or sent to Supplier bills.
Dismissed	Set aside, for example a duplicate or a document that is not a bill.

The number next to **Receipts & bills** in the menu is how many bills are waiting for review.

How to: upload a supplier invoice

- 1 In the menu, open **Expenses** → **Receipts & bills**.
- 2 Click **Upload bill** and choose the PDF or photo — or simply drag the file anywhere onto the page and drop it when **Drop the bill here** appears.
- 3 Wait for the message **Reading the document....** When it is done you see **Bill added — check the details** and the review panel opens.
- 4 Check what was read and correct anything that is wrong (see "Reviewing a bill" below).
- 5 Choose what to do with it: **Confirm match**, **Add expense** or **Add to Supplier bills**. If you are not ready yet, click **Save details** and come back to it later from the **To review** tab.

How to: email bills in

- 1 In the menu, open **Expenses** → **Receipts & bills**.
- 2 In the blue **Forward bills by email** note, click **Copy address**.
- 3 In your email program, forward the supplier's email to that address, with the invoice attached as a PDF or photo. (Many people set up an email rule that forwards invoices from regular suppliers automatically.)
- 4 The bill appears in the list a little later, already read, marked **Emailed in**.

GOOD TO KNOW

The forwarding address is personal to you, and the list shows the bills *you* uploaded or emailed in. If the blue note is not there, email forwarding has not been set up for your organisation yet.

Automatic reading

When a bill is uploaded or emailed in, ORYX Business uses AI to read it: the supplier's name, the invoice number, the date, the total including VAT and the VAT amount. It also suggests a category when one of your expense categories fits. PDF files and photos (JPG, PNG, WEBP, GIF, HEIC) up to 20 MB can be uploaded.

Reading is a help, not a guarantee — always glance at the amount and date before you post. If AI reading is not available for your organisation, or a document is too unclear, the bill is still stored but shows **Couldn't read**; just type the details in.

Reviewing a bill

Click a bill (or its **Review** button) to open it. The document is shown on the left. On the right you can change:

Field	What to enter
Supplier	Who sent the invoice.
Invoice number	The supplier's own number, as printed.
Date	The invoice date.
Amount incl. VAT (R)	The total you have to pay.
VAT (R)	The VAT on the invoice (0.00 if there is none).
Category	The expense category, such as Rent or Stock & Purchases. Categories keep your reports and VAT accurate.

Below the fields are the choices for what to do with the bill. Whatever you choose, the details you typed are saved first.

How to: link a bill to the payment that settled it

- 1 Open the **Match found** tab and click the bill.
- 2 In the **Looks already paid** box, check the payment shown (description, date and amount).
- 3 Click **Confirm match**.
- 4 The bill moves to **Posted** and the document is attached to that payment in your cashbook — no second expense is created.

A match is suggested when a money-out entry in your cashbook has exactly the same amount within three weeks of the invoice date. You can also confirm a match straight from the list with ... → **Confirm match**.

How to: record a paid bill as an expense

- 1 Open the bill from the **To review** tab.
- 2 Check the details and choose a **Category**.
- 3 In the **Record as an expense** box, choose the account under **Paid from**.
- 4 Click **Add expense**.
- 5 A money-out entry is added to your cashbook with the document attached, and the bill shows as **Posted**.

Use this when the payment is not in your cashbook yet (for example, you paid with cash). The quick route from the list is ... → **Add as expense**.

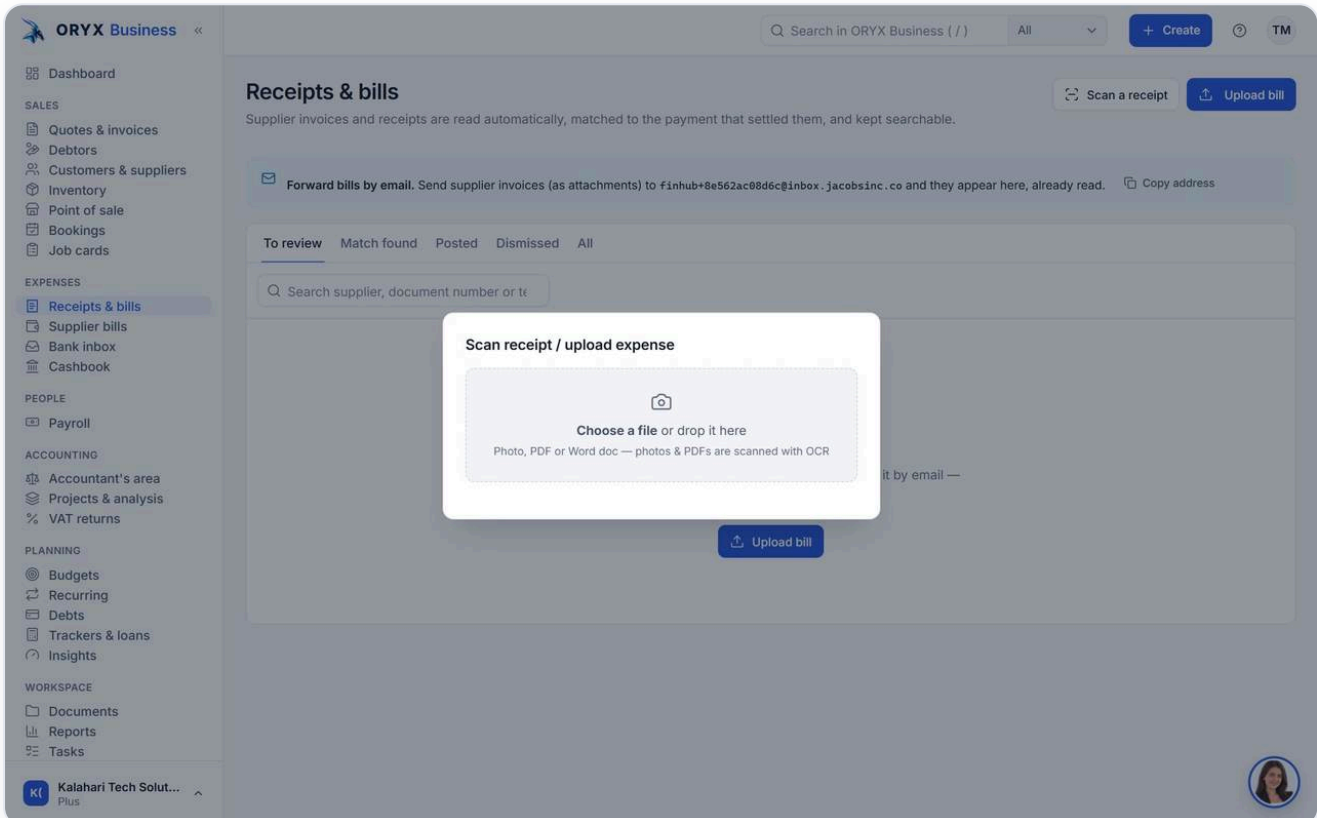
How to: turn a bill into a supplier bill to pay later

- 1 Open the bill from the **To review** tab and check the details and category.
- 2 Find the **Not paid yet?** box.
- 3 Choose the **Business book** it belongs to.
- 4 Optionally choose the **Due** date. If you leave it empty, the supplier's payment terms are used (or 30 days).
- 5 Click **Add to Supplier bills**.
- 6 The bill now waits under **Expenses** → **Supplier bills** with its document. Record the payment there when you pay it; the expense is recorded at that point.

The **Not paid yet?** box only appears when your organisation uses Supplier bills. See the Supplier bills chapter for paying.

How to: dismiss or delete a bill

- 1 For a duplicate or a document that is not a bill, open it and click **Dismiss** (or use ... → **Dismiss** in the list).
- 2 Dismissed bills stay under the **Dismissed** tab, so nothing is lost.
- 3 To remove a bill completely, open the **Posted** or **Dismissed** tab, click ... → **Delete** and confirm. The bill and its stored document are removed for good (a copy already attached to a cashbook entry stays there).



The Scan receipt / upload expense form after a slip was read.

Scanning a receipt you already paid

How to: scan a till slip into the cashbook

- 1 In the menu, open **Expenses → Receipts & bills** and click **Scan a receipt** (or use **Create → Receipt or bill**).
- 2 Click **Choose a file** or drop the file on the box. On a phone you can take a photo straight away. Photos, PDFs and Word documents are accepted.
- 3 Wait while the slip is read. The line under the picture says what was found, for example the amount, the date and the supplier.
- 4 Check **Amount (R)** and **Date**, and choose the **Account (entity)** it was paid from.
- 5 Choose the **Expense category** and add a **Description** if needed. Optionally pick the **Supplier**.
- 6 Tick **Price includes VAT** if the slip shows VAT. The VAT part is worked out at your VAT rate.
- 7 Click **Save expense + backup**. The expense is added to the cashbook with the slip attached.

Photos are read with AI when it is available for your organisation; otherwise (or if AI cannot read it) the text is recognised on your device instead, which is less accurate. PDFs with text are read directly; a scanned PDF is read from its first page. Word documents are not read — they are simply stored as the backup, and you fill in the details. Large photos are shrunk automatically before they are uploaded.

If you pay from a personal book, a **For whom?** field appears: choose **Family (household)** or a family member. If your organisation uses projects, a **Project & analysis** box lets you choose the project or branch the cost belongs to.

Categories

Every bill and receipt should have an expense category. The automatic reading suggests one when the name matches one of your categories exactly. The list of categories is kept under **Settings → Bank accounts & categories**, where an administrator can add new ones.

TIP

Upload the invoice as soon as it arrives, even before you pay it. If you import your bank statement later, the payment will show up as a **Match found** and you only have to click **Confirm match**.

GOOD TO KNOW

People with the **Receipt capture** role can upload bills, correct the details and send them to Supplier bills, but confirming matches, adding expenses and dismissing or deleting bills is done by an owner, administrator, accountant or member.

CAREFUL

If your accountant has locked the books up to a certain date, you cannot add an expense dated on or before that date. Use the real payment date, or ask your accountant.

Supplier bills

Supplier bills keeps track of what your business owes its suppliers: every invoice still to be paid, when it is due, and the payments you make against it. Owners and the person who pays the bills use it to see what is overdue, pay suppliers in one batch, and use supplier credit notes.

Supplier bills
What you owe your suppliers, when it is due, and paying it.

You owe
R 61,696.00
3 suppliers

Overdue
R 27,414.50
pay these first

Due in 7 days
R 25,829.00
coming up

Drafts
1
to check and approve

Ageing bar:

NOT YET DUE	1-30 DAYS	31-60 DAYS	61-90 DAYS	90+ DAYS
R 34,281.50	R 27,414.50	R 0.00	R 0.00	R 0.00

Table:

Supplier	Date	Due	Total	Owed	Status
Highveld IT Distributors BIL-0002 - their ref HV-20988	15 Aug 2026	14 Sept 2026	R 49,588.00	R 27,414.50	27 days overdue
Cape Cabling Supplies BIL-0004 - their ref CCS-8102	12 Sept 2026	12 Oct 2026	R 4,094.00	R 4,094.00	To pay
Highveld IT Distributors BIL-0010 - their ref HV-21233	17 Sept 2026	17 Oct 2026	R 21,735.00	R 21,735.00	To pay
CloudSoft Licensing BIL-0009 - their ref CSL-56904	22 Sept 2026	22 Oct 2026	R 8,452.50	R 8,452.50	To pay

Supplier bills: the totals, the ageing bar and the bills still to pay.

What you see on the page

Open **Expenses** → **Supplier bills**. Supplier bills belong to a business book; if you have more than one, choose the book in the drop-down at the top right.

- **Buttons** — **Supplier credit note**, **New bill** and **Pay bills**.
- **Summary cards** — **You owe** (the total and how many suppliers), **Overdue**, **Due in 7 days** and **Drafts** (bills still to be checked and approved).
- **Ageing** — a bar for each age group: **Not yet due**, **1-30 days**, **31-60 days**, **61-90 days** and **90+ days** overdue, with the amount in each.
- **Tabs** — **To pay**, **All bills**, **Payments** and **By supplier**.

The bill lists show the **Supplier** (with your bill number and the supplier's reference under it), **Date**, **Due**, **Total**, what is still **Owed** and the **Status**. Use the search box to find a supplier or invoice number.

Status	What it means
--------	---------------

Draft	Captured but not yet approved. It is not on the list to pay.
To pay	Approved and still owed (fully or partly).
... days overdue	To pay, and past its due date. Amber up to 30 days, red after that.
Paid	Nothing is owed any more.
Void	Cancelled. It stays on record but is not owed.
Credit to use / Credit used	A supplier credit note with an amount still available, or one that has been used up.

The tabs

- **To pay** — approved bills still owed, oldest due date first, with quick filters **All**, **Overdue** and **Due in 7 days**. Tick bills here and click **Pay these** to pay them in one go.
- **All bills** — every bill and credit note, filtered by **Drafts**, **To pay**, **Paid**, **Credit notes** or **Void**.
- **Payments** — every supplier payment: date, supplier and the bills it paid, the account it came **From** (or "Not in the cashbook") and the amount **Paid**.
- **By supplier** — the creditors age analysis: one line per supplier with the amount in each age group, the total and the next due date. Click a supplier to see their bills.

Capturing bills

There are two ways a bill arrives here:

- From **Receipts & bills**: upload or email in the supplier's invoice, check what was read, and click **Add to Supplier bills**. The bill arrives ready to pay, with the document attached.
- By typing it in with **New bill**, as described below — useful for invoices with several lines or VAT types.

Supplier bills
What you owe your suppliers, when it is due, and when it's paid.

You owe **R 61,696.00**
3 suppliers

NOT YET DUE **R 34,281.50** 1-30 DAYS **R 27,414.50**

To pay All bills Payments By supplier

All Overdue Due in 7 days

Search supplier or invoice number

Supplier

Highveld IT Distributors
BIL-0002 - their ref HV-20988

Cape Cabling Supplies
BIL-0004 - their ref CCS-8102

Highveld IT Distributors
BIL-0010 - their ref HV-21233

CloudSoft Licensing
BIL-0009 - their ref CSL-56904

New supplier bill

Supplier
Search or type a new supplier

Their invoice number
As printed by the supplier — used to catch duplicates.

Date
2026/10/11

Due
yyyy/mm/dd

Leave empty for the supplier's payment terms (or 30 days).

☒ Amounts include VAT (as on the invoice)

Item	Qty	Price (R)	VAT	Category	Amount
What was bought	1	0.00	Standard		R 0.00

+ Add a line

Excl. VAT **R 0.00**
VAT **R 0.00**
Total **R 0.00**

Notes

Cancel Save as draft Save — to pay

Capturing a new supplier bill line by line.

How to: capture a supplier bill

- 1 In the menu, open **Expenses** → **Supplier bills** and click **New bill**.
- 2 Under **Supplier**, start typing the name and pick the supplier from the list. If they are new, click **+ New supplier "..."** and they are added to your customers and suppliers.
- 3 Enter **Their invoice number** exactly as printed — it is used to catch duplicates.
- 4 Check the **Date** and, if you know it, the **Due** date. Left empty, the due date follows the supplier's payment terms, or 30 days.
- 5 Leave **Amounts include VAT (as on the invoice)** switched on if the prices on the invoice include VAT.
- 6 For each line, type **Item**, **Qty** and **Price (R)**, choose the **VAT** type and the **Category**. Use **Add a line** for more lines. The totals excluding VAT, the VAT and the total update as you type.
- 7 Add **Notes** if you want to.
- 8 Click **Save — to pay** to put it straight on the list to pay, or **Save as draft** if someone else must approve it first.

The VAT types are **Standard rate**, **Zero-rated**, **Exempt** and **No VAT**. If the business book has no VAT number, only **No VAT** is offered and no VAT is claimed on purchases. If your organisation uses projects, you can choose a project or branch for the whole bill and, with the small tag on a line, a different one for that line.

GOOD TO KNOW

The same supplier invoice number can only be captured once per supplier and book. If you try again you see a message like "... invoice ... is already captured".

How to: check and approve a draft

- 1 Open the **All bills** tab and choose **Drafts** (the **Drafts** card shows how many there are).
- 2 Click the bill to open it. You see its lines, the VAT, the total and any attached document.
- 3 If something is wrong, click **Edit**, correct it and save.
- 4 Click **Approve**. The bill is now on the list to pay.

Opening a bill

Clicking any bill opens it on the side: the date, due date, book, the lines, totals and what is **Still owed**. Under **Paid / credited** you see each payment and credit note used on it. In the **Document** section you can open the attached invoice, or choose a file to attach one. The buttons at the bottom depend on the bill: **Edit**, **Void**, **Approve**, **Record payment** or **Use against a bill**.

Due dates and ageing

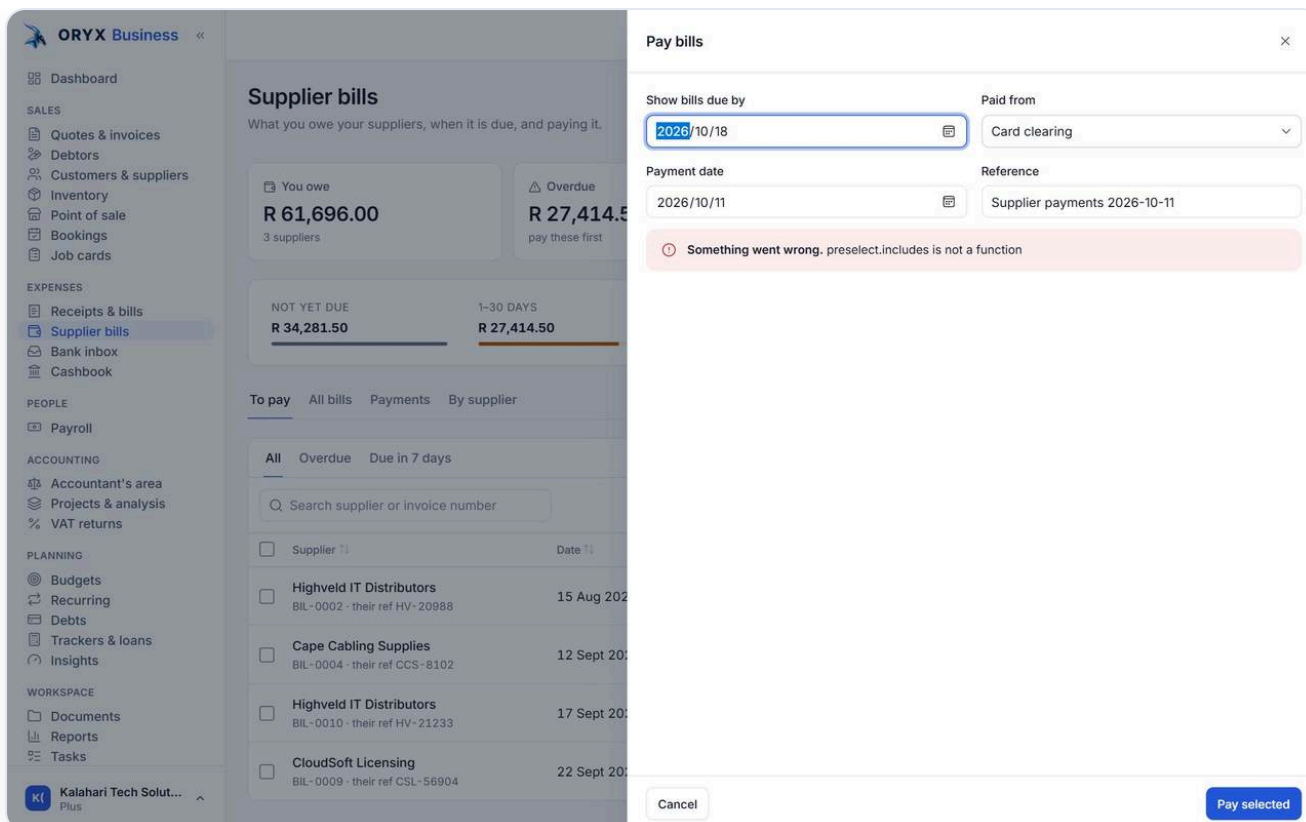
Every bill has a due date — the one you entered, or the supplier's payment terms, or 30 days after the invoice date. A bill becomes overdue the day after its due date, and the badge counts the days. The ageing bar and the **By supplier** tab group what you owe by how late it is, so you can see at a glance who to pay first.

Paying bills

How to: pay one supplier

- 1 Open the bill and click **Record payment**.
- 2 The **Pay ...** window lists all of that supplier's open bills. Tick the ones this payment covers and, under **Pay (R)**, adjust the amount for a part-payment.
- 3 Choose **Paid from** — the bank account the money left. Choose — **Not through a bank account here** — if it was paid some other way.
- 4 Check the **Date**, choose **How** (EFT, Card, Cash or Other) and add a **Reference**, such as the reference on your bank payment.
- 5 Check the **Total payment** line and click **Record payment**.

A payment from a bank account is also recorded in that account's cashbook as one money-out entry ("Supplier payment — ..."), carrying the VAT share of the bills it settles. Bills paid in full change to **Paid**; part-paid bills stay on the list with the smaller amount owed.



Pay bills: choose what is due, record the payments and download the list for your bank.

How to: pay several suppliers at once

- 1 Click **Pay bills** (or tick bills on the **To pay** tab and click **Pay these**).
- 2 Set **Show bills due by** — by default a week from today — to list what is due.
- 3 Choose **Paid from**, the **Payment date** and a **Reference**.
- 4 Untick any bill you do not want to pay now. The line under the list shows how many bills, how many supplier payments and the total.
- 5 Click **Pay selected** and confirm with **Record payments**. One payment is recorded per supplier.
- 6 Click **Download the payment list (CSV)**. It lists each supplier, the amount and the bills it pays — use it to load the payments in your bank.

CAREFUL

Recording payments here does not move any money. Make the actual payments in your banking app too.

How to: undo a payment

- 1 Open the **Payments** tab.
- 2 On the payment, click ... → **Delete payment**.
- 3 Confirm. The bills are owed again and the cashbook entry is removed.

Supplier credit notes

When a supplier gives you credit — for returned goods or an overcharge — capture their credit note and use it against an open bill.

How to: capture and use a supplier credit note

- 1 Click **Supplier credit note**.
- 2 Choose the supplier, enter **Their credit note number** and the date, and add the lines just like a bill.
- 3 Click **Save**. It shows as **Credit to use**.
- 4 Open the credit note and click **Use against a bill**.
- 5 Choose the bill under **Against bill**, check the **Amount (R)** (it cannot be more than is left on the credit note or the bill) and click **Use credit**.

Changing or cancelling a bill

A bill can be edited until a payment or credit note has been used on it. After that it is locked — delete the payment first if you really need to change it. To cancel a bill, open it, click **Void** and give a reason. A void bill stays on record but is no longer owed.

TIP

Keep the **Due in 7 days** card in view. Running **Pay bills** once a week with "due by" set a week ahead means nothing slips into the overdue columns.

GOOD TO KNOW

The expense reaches your cashbook when you pay a bill, not when you capture it. People with the **Receipt capture** role can capture bills and save drafts; approving, paying, using credit notes and voiding is done by an owner, administrator, accountant or member.

CAREFUL

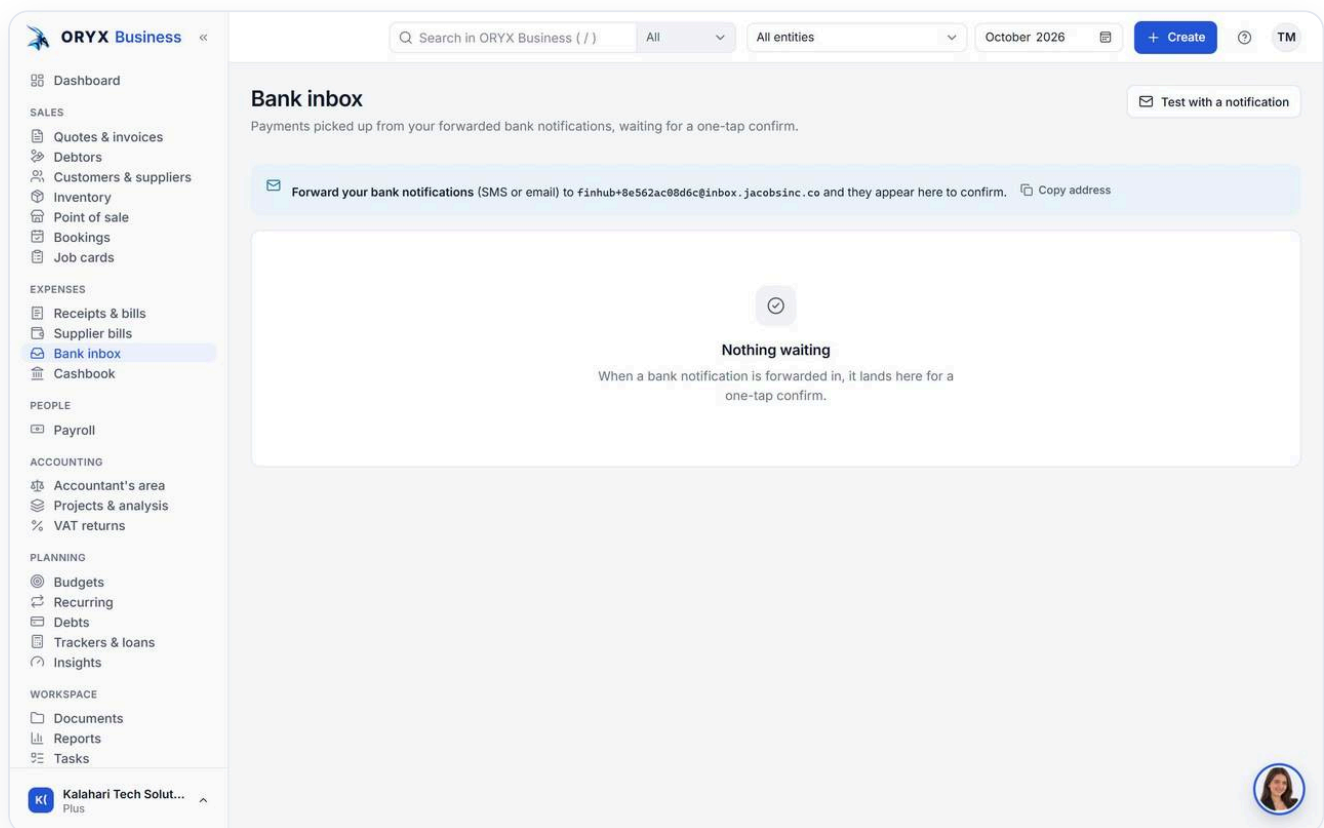
If the books are locked up to a date, bills and payments dated on or before it cannot be added or changed.

Bank inbox and statement import

You should not have to type in what your bank already knows. ORYX Business gives you two ways to bring bank activity into your cashbook: the **Bank inbox**, which picks up the payment notifications (SMS or email) you forward from your bank, and **Import statement**, which reads a whole bank statement at once.

The Bank inbox

Most South African banks send a notification for every payment in or out. Forward those notifications to your personal ORYX Business address and each one appears in the Bank inbox, already read: the amount, whether money came in or went out, the date, the shop or payer, the bank, the last digits of the account or card, and the bank reference. You then confirm it with one click, and it becomes a cashbook entry.



The Bank inbox with notifications waiting to be confirmed.

What you see on the page

- A blue note with your forwarding address and a **Copy address** button. If the inbox is not set up yet, an amber note says so — an administrator adds the forwarding address under **Settings** → **Integrations**.
- **Test with a notification** — paste a notification by hand to see how it is read.
- The list of notifications **to confirm**, with **Date**, **Details**, **Account**, **Category** and **Amount**, and three buttons on each row: the eye (**View original message**), **Add to cashbook**, and the bin (**Dismiss**).

Under the details you may see small tags:

Tag	What it means
reserved	The bank has only reserved the amount (pending authorisation); it may still change.
needs review	The message came from your bank but could not be read clearly. Open the original and fill in the details yourself.
acc/card ... 1234	The last digits of the account or card the bank mentioned.
Ref:	The bank reference. It is added to the description when you confirm.

The number next to **Bank inbox** in the menu shows how many notifications are waiting.

How to: set up the Bank inbox

- 1 In the menu, open **Settings** → **Integrations** and copy **Your personal forwarding address** from the **Bank inbox (auto-capture)** panel.
- 2 In your email, create a rule that forwards the messages from your bank to that address. (If your bank sends SMSes, use your phone's forwarding or your bank's option to send notifications by email.)
- 3 Open **Settings** → **Bank accounts & categories** and click the pencil next to the matching account.
- 4 In **Bank-notification match**, type the account or card digits your bank shows in its notifications (for example 8281 or 974188).
- 5 Optionally tick **Auto-add settled notifications for this account (skip review)**.
- 6 Click **Save**. Repeat for each account and card.

With the match digits set, each notification is placed on the right account automatically. When **Auto-add settled notifications** is on, a notification goes straight into the cashbook without waiting in the inbox — but only when it really came from a known bank, matched an account, is not just a reservation and does not look like a duplicate. Everything else waits for you.

How to: confirm a notification

- 1 In the menu, open **Expenses** → **Bank inbox**.
- 2 If the **Account** column shows **Choose an account**, pick the account it belongs to.
- 3 Choose a **Category**.
- 4 For a row marked **needs review**, click the eye to read the original message, then type what it was for, choose **Expense** or **Income** and enter the amount.
- 5 Click **Add to cashbook**. The row disappears from the inbox and the entry appears in your cashbook.

If a notification is not something you want in the books, click the bin to dismiss it.

How to: test how a notification is read

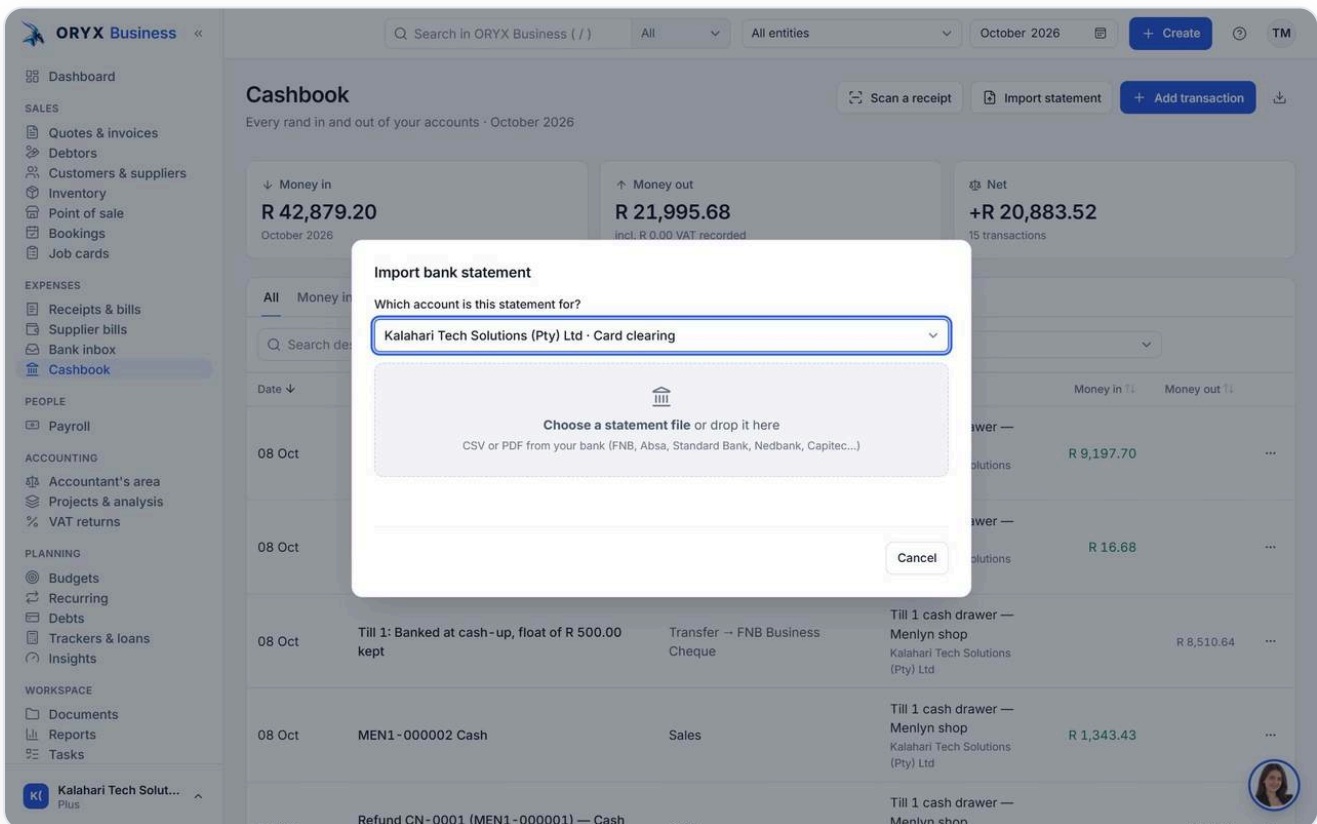
- 1 On the Bank inbox page, click **Test with a notification**.
- 2 Paste the text of a bank SMS or email.
- 3 Click **Read it**. The notification lands in your inbox just like a forwarded one (or is added straight away when auto-add applies).

GOOD TO KNOW

One-time PINs, marketing messages and "your statement is ready" emails are recognised and ignored. A notification that is already in the inbox or already in the cashbook is skipped as a duplicate. Emails that do not look like they come from a bank are ignored, and only notifications sent from a known bank's address are ever added automatically — this protects you against fake notifications. The inbox is personal: you see the notifications you forwarded.

Importing a bank statement

For a whole month (or more) at once, import the statement your bank lets you download. ORYX Business reads every line, suggests a category for each, flags duplicates, and lets you tick what to import.



Import bank statement: choose the account and the file.

How to: import a bank statement

- 1 In the menu, open **Expenses** → **Cashbook** and click **Import statement** (or use **Create** → **Import bank statement**).
- 2 Under **Which account is this statement for?**, choose the account.
- 3 Click **Choose a statement file** (or drop it on the box) and pick the CSV or PDF statement from your bank — FNB, Absa, Standard Bank, Nedbank, Capitec and others work.
- 4 Wait while the transactions are read. You then see **Found ... transactions**, and how many look like duplicates.
- 5 Go through the list: untick anything you do not want, and change the **Category** where the suggestion is wrong.
- 6 If this is the first import into an empty account, check **Set this account's opening balance** (see below).
- 7 Click **Import selected**. You see how many transactions were imported.

Reviewing the lines

- Every line has a tick box, the **Date**, the **Description**, a **Category** and the **Amount** (money in with a plus, money out with a minus).
- **already in** — the same transaction is already in this account. These lines are unticked for you.
- **possible dup** — something with the same date and amount already exists (perhaps captured from a notification or a receipt). Check before you import; these stay ticked.
- **Link all to a tracker or loan (optional)** — tags every imported line to one of your trackers or loans.
- For a personal book, **Tag these personal expenses to** chooses the family member (or Family) for the expenses.
- ← **Back** takes you back to choose a different file.

The opening balance

The first time you import into an account with no entries yet, ORYX Business offers to set the account's opening balance, so that its balance matches the bank. If the statement has a balance column, the balance *before* your earliest transaction is filled in for you; adjust it if needed. Leave the box unticked if the account started at zero.

CSV or PDF?

Both work when AI reading is available for your organisation; the AI understands any bank's layout and suggests categories. Without it, only CSV files can be imported (PDF import needs AI reading), and categories are not suggested — choose them yourself.

Matching to your bills

Once bank payments are in the cashbook, they are matched to the supplier invoices waiting in **Receipts & bills**: a bill with a payment of exactly the same amount within three weeks of its date shows as **Match found**, and one click on **Confirm match** attaches the invoice to that payment. Bills you pay through

Supplier bills are recorded in the cashbook when you record the payment there, so do not import that same payment a second time — untick it if it is flagged **possible dup**.

TIP

Use both: forward notifications for day-to-day activity, then import the month's statement as a check. Lines already captured from notifications show as **already in** or **possible dup**, so you only import what is missing.

CAREFUL

Transactions dated on or before your books' lock date cannot be added. If an import or a confirmation is refused for that reason, speak to your accountant.

Cashbook

The Cashbook is the record of every rand in and out of your bank accounts, cash boxes and cards. Entries arrive from statement imports, the Bank inbox, scanned receipts, customer and supplier payments — and anything you add by hand. Keeping it complete and categorised is what makes your reports, budgets and VAT figures right.

ORYX Business «

Q Search in ORYX Business (/) All All entities October 2026 + Create ? TM

Cashbook Every rand in and out of your accounts · October 2026

Scan a receipt Import statement + Add transaction

↓ Money in **R 42,879.20** October 2026

↑ Money out **R 21,995.68** Incl. R 0.00 VAT recorded

Net **+R 20,883.52** 15 transactions

All Money in Money out Transfers Uncategorized

Q Search description, contact or amount All categories All accounts

Date ↓	Description ↑	Category ↑	Account ↑	Money in ↑	Money out ↑
08 Oct	MEN1 - 000004 Cash	Sales	Till 1 cash drawer — Menlyn shop Kalahari Tech Solutions (Pty) Ltd	R 9,197.70	...
08 Oct	MEN1 - 000003 Cash	Sales	Till 1 cash drawer — Menlyn shop Kalahari Tech Solutions (Pty) Ltd	R 16.68	...
08 Oct	Till 1: Banked at cash-up, float of R 500.00 kept	Transfer → FNB Business Cheque	Till 1 cash drawer — Menlyn shop Kalahari Tech Solutions (Pty) Ltd		R 8,510.64 ...
08 Oct	MEN1 - 000002 Cash	Sales	Till 1 cash drawer — Menlyn shop Kalahari Tech Solutions (Pty) Ltd	R 1,343.43	...
08 Oct	Refund CN-0001 (MEN1-000001) — Cash	Sales	Till 1 cash drawer — Menlyn shop		R 16.68 ...

The Cashbook for one month, with totals at the top.

What you see on the page

Open **Expenses** → **Cashbook**. The cashbook shows one month at a time: choose the month in the period box in the top bar. If you keep more than one business or book, the drop-down next to it (**All entities** or a single book) narrows the list.

- **Buttons** — **Scan a receipt**, **Import statement**, **Add transaction** and the download button (**Export CSV**), which downloads the month's entries as a spreadsheet file.
- **Totals** — **Money in**, **Money out** (with the VAT recorded on expenses) and **Net** for the month.
- **Tabs** — **All**, **Money in**, **Money out**, **Transfers** and **Uncategorised**.
- **Filters** — **All categories** and **All accounts**, plus a search box that finds a description, contact or amount.
- **Columns** — **Date**, **Description**, **Category**, **Account**, **Money in** and **Money out**. Under the description you see the contact, the family member, the tracker or loan, and whether the entry is shared. A small picture or paperclip means a slip is attached; click it to open the slip.

- A line at the bottom counts the entries and totals money in, money out and the net.

Click an entry to edit it, or use its ... menu for **Edit**, **View attachment** and **Delete**. Entries that someone else shared with you are marked **Shared with you (read only)**.

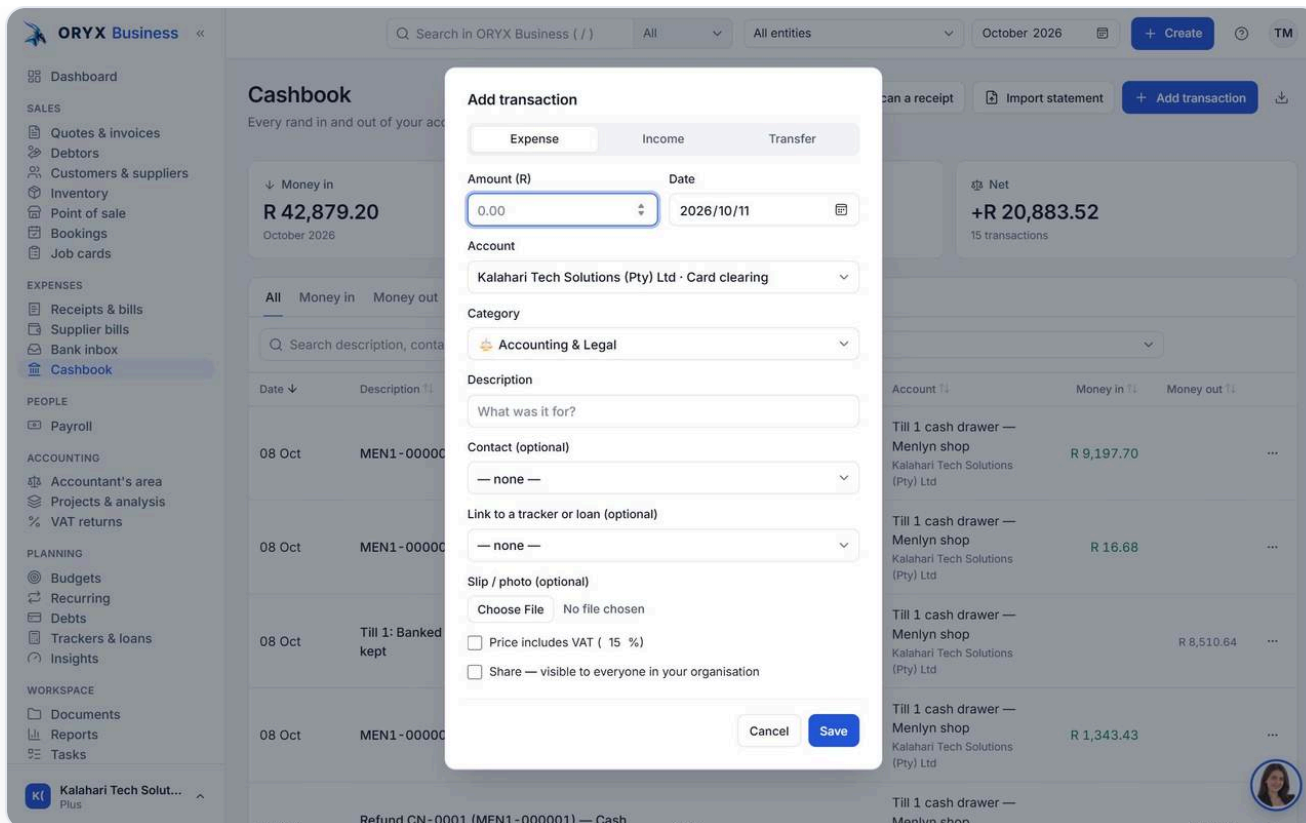
Accounts

Every entry belongs to an account. An account is a bank account, cash box, credit card or savings account inside one of your books. You manage them under **Settings → Bank accounts & categories**, where the **Accounts** table shows each account's entity, type, opening balance and current **Balance**.

How to: add a bank account

- 1 In the menu, open **Settings → Bank accounts & categories**.
- 2 In the **Accounts** panel, click **Add**.
- 3 Choose the **Entity** (the business or book it belongs to) and type a **Name**, such as "FNB Business Account".
- 4 Choose the **Type**: **Bank account**, **Cash**, **Credit card** or **Savings**.
- 5 Enter the **Opening balance (R)** — what the account held before the first entry you will record. Use a minus for an overdraft.
- 6 If you use the Bank inbox, fill in **Bank-notification match** (see the Bank inbox chapter).
- 7 Click **Save**.

To stop using an account, edit it and click **Archive**. Its history stays.



Adding a transaction: choose Expense, Income or Transfer at the top.

Adding transactions

How to: add an expense or income by hand

- 1 In the menu, open **Expenses** → **Cashbook** and click **Add transaction** (or use **Create** → **Transaction**).
- 2 At the top, choose **Expense** or **Income**.
- 3 Enter the **Amount (R)** and the **Date**.
- 4 Choose the **Account** and the **Category**.
- 5 Type a **Description** ("What was it for?") and, if you like, choose a **Contact**.
- 6 Tick **Price includes VAT** if the amount includes VAT; the VAT part is worked out at your VAT rate.
- 7 Optionally attach a **Slip / photo** (photo, PDF or Word document), which is kept as a backup.
- 8 Click **Save**.

Other fields appear when they apply:

Field	When you see it
For whom?	An expense from a personal book: choose Family (household) or a family member. It is required there.

Link to a tracker or loan (optional)	When you have trackers or loans (see the Planning chapter).
Project & analysis	When your organisation uses projects or analysis codes: choose the project, branch or department.
Share — visible to everyone in your organisation	Tick it to let other users see the entry (read only), even if they cannot see that book.

Transfers

Moving money between your own accounts — say from the cheque account to savings, or paying the credit card from the bank — is a transfer, not an expense. It does not count as money in or out of the business.

How to: record a transfer between accounts

- 1 Click **Add transaction** and choose **Transfer** at the top.
- 2 Enter the **Amount (R)** and the **Date**.
- 3 Under **Account**, choose where the money came from; under **To account**, where it went.
- 4 Add a description and click **Save**.

Transfers appear on the **Transfers** tab and show "Transfer → *account*" in the Category column.

Categories

Categories say what money was for — Rent, Fuel, Sales, Stock & Purchases and so on. They drive your reports, budgets and VAT, so try to keep the **Uncategorised** tab empty. The list is under **Settings** → **Bank accounts & categories** in the **Categories** panel. An administrator can click **Add** to create one, with a **Name**, a **Kind (Expense or Income)** and an optional **Icon (emoji)**, or click the pencil to rename one.

How to: clear the Uncategorised list

- 1 In the Cashbook, open the **Uncategorised** tab.
- 2 Click the first entry to open it.
- 3 Choose the right **Category** and click **Save**.
- 4 Repeat until the tab shows **Everything is categorised**. Check the other months with the period box in the top bar.

Changing and deleting entries

Click an entry, change what you need and click **Save**. To replace a slip, choose a new file in **Slip / photo**. To remove an entry, use ... → **Delete**; it is removed from the cashbook and your reports, and any attached slip goes with it.

Entries created by other parts of ORYX Business — such as a supplier payment recorded under Supplier bills — are best changed where they were made, so both places stay in agreement.

Keeping the cashbook in line with the bank

There is no separate "reconcile" screen; instead, a few habits keep the cashbook and the bank in agreement:

- Set each account's opening balance correctly — when you add the account, or with the offer on your first statement import.
- Import each month's statement. Lines already in the cashbook are flagged **already in** and left out, so you only add what is missing.
- Compare the **Balance** shown for the account under **Settings** → **Bank accounts & categories** with the closing balance on your bank statement. If they differ, look for a missing, duplicated or wrongly dated entry.
- Record transfers as transfers, not as an expense on one side and income on the other.

If your accountant runs the ledger in the Accountant's area, its **Ledger checks** also confirm that each bank account in the ledger equals the cashbook.

TIP

Use the search box with an amount (for example 1250.00) to find a specific payment quickly.

GOOD TO KNOW

Adding, editing and importing transactions needs a role that may edit the books (owner, administrator, accountant or member). Viewers can look but not change. **Export CSV** is available when your plan includes Reports.

CAREFUL

When the books are locked up to a date, entries dated on or before it cannot be added, changed or deleted.

Accountant's area

The Accountant's area keeps a full double-entry general ledger for each business book, built automatically from the invoices, payments, bills, cashbook, stock, payroll and VAT returns you already record. Your accountant works here: journal entries, the chart of accounts, the trial balance, income statement and balance sheet, lock dates and year end. Business owners use it to see the figures and to send their accountant a note.

The screenshot shows the 'Accountant's area' dashboard for 'Kalahari Tech Solutions (Pty) Ltd'. The interface includes a sidebar with navigation menus for SALES, EXPENSES, PEOPLE, ACCOUNTING, PLANNING, and WORKSPACE. The main content area is titled 'Accountant's area' and provides an overview of key financial figures and shortcuts. Key figures include Sales (R 731,823.71), Gross profit (R 612,243.85), Net profit (R 193,974.40), Bank and cash (R 142,032.80), and Customers owe (R 248,770.10). Shortcuts for actions like 'Send a note to my accountant', 'Process journal entries', 'Recurring journal entries', and 'VAT' are provided. A 'Ledger checks' section shows that trial balance and journal balances are correct. A 'This book' section displays ledger start and end dates, financial year, and locked books.

The Accountant's area overview: key figures, shortcuts and the ledger checks.

Finding your way around

Open **Accounting** → **Accountant's area**. If you have more than one business book, choose the book in the drop-down at the top right. The tabs are:

Tab	What it is for
Overview	Key figures for this financial year, shortcuts, the ledger checks and facts about the book.
Notes	Questions and answers between the business and its accountant (the number shows unread notes).
Journal entries	Adjustments your accountant enters, such as accruals and depreciation.
Recurring journals	Journals that repeat every week, month, quarter or year.

Reports	Trial balance, income statement, balance sheet, general ledger and more.
Trial balance export	The trial balance as CSV, Excel or PDF for your accountant's own software.
Chart of accounts	The list of ledger accounts.
Settings	Lock date and year end , Opening balances and Category mapping .

Before the ledger is started, the tabs are **Overview**, **Notes**, **Set up the ledger**, **Chart of accounts** and **Category mapping**.

Who can do what

Role	View figures and reports	Enter journals	Mark journals as reviewed, edit reviewed ones	Chart, mapping, opening balances, lock date, year end
Owner / Administrator	Yes	Yes	Yes	Yes
Accountant	Yes	Yes	Yes	Yes
Member	Yes	Yes	No	No
Viewer	Yes	No	No	No

Inviting your accountant

How to: give your accountant access

- 1 In the menu, open **Settings** → **Users & roles** (administrators only) and click **Add user**.
- 2 Enter your accountant's **Name** and **Email (used to sign in)**.
- 3 Under **Role**, choose **Accountant (runs the ledger)**.
- 4 Choose the **Sign-in method** and set a **Password** to give them.
- 5 Under **Can see these entities**, tick the business books they look after.
- 6 Click **Save**. If your accountant already uses ORYX Business for other clients, they are simply added to your organisation and keep their own sign-in.

If your accountant does not sign in, an administrator can still enter their **Name** and **Email** under **Notes** → **Your outside accountant**, so that notes are emailed to them.

Setting up the ledger

A book has no ledger until someone with the Accountant role (or an administrator) starts it. Nothing is posted until you click the final button.

How to: start the general ledger

- 1 Open **Accounting** → **Accountant's area** and click **Set up the ledger**.
- 2 Under **1. What the ledger will start with**, look at the dry run: the trial balance the ledger would have, built from everything already recorded, and how many of each document will be posted. Nothing has been posted yet.
- 3 Under **2. Check the set-up**, open the **Chart of accounts** (a South African chart with control accounts for debtors, creditors, VAT, stock and payroll) and the **Category mapping**, and adjust them if needed.
- 4 Check the **Start date** — the first day with activity — and click **Save** if you change it.
- 5 Under **3. Start**, click **Start the ledger** and confirm. One journal is posted per document.
- 6 Enter balances from before your records began under **Settings** → **Opening balances** (see below).

From then on the ledger keeps itself up to date: every invoice, payment, bill, cashbook entry, stock movement, pay run and submitted VAT return posts its own journal. When a document changes, the ledger posts a reversal of the old journal and a new one, so nothing is ever overwritten and the history stays visible.

The overview

The cards show **Sales**, **Gross profit**, **Net profit** (before tax, this financial year), **Bank and cash**, **Customers owe**, **Owed to suppliers** and **VAT owed to SARS** (or **VAT refund due**). If your organisation uses projects, a **Show** drop-down recalculates the figures for one project or branch. The shortcuts lead to notes, journals, recurring journals, VAT, reports and the trial balance export.

Ledger checks confirm that the trial balance balances, every journal balances, accounts receivable equals what customers owe, accounts payable equals what you owe suppliers, inventory equals the stock valuation and each bank account equals the cashbook. Accounts that should be cleared — such as Suspense, where uncategorised cashbook entries land — are flagged. **This book** shows when the ledger started, the financial year, the lock date and the number of posted journals.

Notes to the accountant

How to: send your accountant a note

- 1 Open the **Notes** tab and click **New note** (or click **Send a note to my accountant** on the overview).
- 2 Choose the **Business book** if you have more than one, and type a **Subject**.
- 3 Write the **Note** and click **Send**.
- 4 The note is emailed to the people with the Accountant role who can see the book (and to the outside accountant, if set). Replies appear in the same thread and are emailed back to the owners and administrators.

Notes are listed under **Open**, **Closed** and **All**. Open a thread to read it, write a **Reply**, or **Close / Reopen** it. Notes cannot be edited or deleted. From any journal you can click **Ask my accountant about this** to start a note about it.

Accountant's area
Kalahari Tech Solutions (Pty) Ltd — the general ledger, journal entries and reports your accountant works with.

Overview Notes **Journal entries** Recurring journals Reports Trial balance export Chart of accounts Settings

► How journal entries work

New journals 0 Reviewed journals

▼ Actions Import journals Export Search

☐	Date	Effect	Account	Reference	Description	VAT type	Amount	VAT	Incl. VAT	By affecting account
☐	2026/10/11	Debit	Choose...			No VAT	0.00	0.00	R 0.00	(None)

You have no new journals to review. Import your journals or enter them above.

Save Mark selected as reviewed Mark all as reviewed Print preview

Process journal entries: draft lines waiting to be reviewed.

Journal entries

Journals work like Sage's "Process Journal Entries". The **New journals** tab holds drafts; drafts change nothing in the ledger until they are marked as reviewed. Each line has a **Date**, **Effect** (Debit or Credit), **Account**, **Reference**, **Description**, **VAT type**, **Amount** (excluding VAT), **VAT**, **Incl. VAT** and an optional **By affecting account**.

- The account gets the amount excluding VAT. The VAT goes to VAT input (debit lines) or VAT output (credit lines) and onto your VAT201. The affecting account gets the amount including VAT.
- Lines without an affecting account are posted together per date and reference, and must balance. An amber message shows any difference.
- Accounts receivable, accounts payable and inventory cannot be journalled — they always follow their invoices, bills and stock.

How to: enter and post a journal

- 1 Open the **Journal entries** tab.
- 2 On the empty line, enter the date, choose Debit or Credit, the account, a reference and description, the VAT type and the amount.
- 3 Choose a **By affecting account**, or click + to add the opposite line of a multi-line journal (it copies the date, reference and description).
- 4 Click **Save**. The lines are kept as drafts; use **Print preview** to check them on paper.
- 5 To post, tick the lines and click **Mark selected as reviewed**, or click **Mark all as reviewed**.

Posted lines move to **Reviewed journals**, where you can filter by date, search, export and print.

Someone who may review can still **Edit** or **Delete** a reviewed journal: the change is posted as a reversal plus the corrected entry. Click a journal number to see its lines, its source document and its history.

To bring in many journals at once, click **Import journals**, download the template, and upload a CSV with the columns Date, Effect, Account, Reference, Description, VAT Type, Amount and By affecting account. Lines arrive as drafts; if any line has a problem, nothing is imported and the problems are listed. **Export** downloads journals as CSV.

Recurring journals

For entries you post every period, such as monthly depreciation, click **Add recurring journal** on the **Recurring journals** tab. Give it a **Template name**, a **Frequency** (Monthly, Weekly, Quarterly or Yearly), a **Start date** and optional **End date**, and enter the lines. Tick **Mark as reviewed** to post straight away; otherwise drafts are created under New journals on each run date. Missed dates are caught up, each date once. Use **Create due journals now** to run them immediately, and the row menu to **Edit**, **Stop** or **Delete** a template.

ORYX Business

Search in ORYX Business (/)

All ▾

+ Create

?

TM

Dashboard

SALES

- Quotes & invoices
- Debtors
- Customers & suppliers
- Inventory
- Point of sale
- Bookings
- Job cards

EXPENSES

- Receipts & bills
- Supplier bills
- Bank inbox
- Cashbook

PEOPLE

- Payroll

ACCOUNTING

- Accountant's area**
- Projects & analysis
- VAT returns

PLANNING

- Budgets
- Recurring
- Debts
- Trackers & loans
- Insights

WORKSPACE

- Documents
- Reports
- Tasks

Kalahari Tech Solutions (Pty) Ltd - 01 Mar 2026 – 11 Oct 2026

Account	Name	Type	Debit	Credit
1000	Sales	Sales		R 731,823.71
2000	Cost of sales	Cost of sales	R 116,885.46	
2100	Stock adjustments and write-offs	Cost of sales	R 2,694.40	
3050	Advertising and marketing	Expense	R 6,404.35	
3100	Bank charges	Expense	R 2,137.00	
3200	Computer and software expenses	Expense	R 26,437.61	
3250	Consulting fees	Expense	R 2,000.00	
3300	Depreciation	Expense	R 1,250.00	
3350	Electricity and water	Expense	R 9,341.75	
3450	Insurance	Expense	R 4,891.00	
3650	Fuel and travel	Expense	R 7,100.00	
3700	Courier and postage	Expense	R 4,105.00	

Reports

Report	What it shows
Trial balance	Every account's balance, debits equal to credits. Choose Closing balances or Opening, movement, closing . Click an account to see its transactions.
Income statement	Sales, cost of sales, gross and net profit, excluding VAT, on the accrual basis. Compare with the previous period or year.
Balance sheet	Assets, equity and liabilities at a date, optionally compared with last year end.
General ledger	Each account's transactions with a running balance and a link to the source document. Choose one account or all with activity.
Journal report	Every posted journal and its lines; filter to journals from documents, journal entries or reversals.
VAT reconciliation	Ledger VAT per tax period against the VAT201 returns.
Ledger checks	The control-account checks from the overview, each marked OK, Check or Problem.

Trial balance export

On the **Trial balance export** tab, choose the **Format** (CSV, Excel or PDF), the **Date range**, what to **Show** (closing balances, or opening, debits, credits and closing) and which **Account numbers** to use, then click **Export data**. If your accountant uses their own numbering, click **Assign account numbers**, type their number next to each account and click **Save account numbers**; then choose **Assigned account numbers (yours)** when exporting.

Chart of accounts

The **Chart of accounts** tab lists every account by section with its number, what uses it and its balance; search to find one. Administrators and accountants can click **Add account** (number, name, type, description and your own account number) or the pencil to change one. System accounts and accounts linked to a cashbook account have limits on what can change. An account that has been used cannot be deleted, but it can be made inactive so it is not offered in new journals.

Settings

Lock date and year end

Once your accountant has finished a period, lock it: nothing dated on or before the lock date can then be added, changed or deleted anywhere — invoices, payments, bills, cashbook entries, pay runs, VAT returns or journals.

How to: lock a period

- 1 Open **Settings** → **Lock date and year end** in the Accountant's area.
- 2 Choose the **New lock date**.
- 3 If you are moving the date back to open a locked period, type a **Reason** — it is kept in the audit trail.
- 4 Click **Save lock date**. **Remove the lock** takes it away completely (also with a reason).

How to: close a financial year

- 1 Make sure no draft journals are left in the year.
- 2 Under **Year end**, choose the **Financial year ending** date.
- 3 Click **Close the year** and confirm.
- 4 The year is recorded and locked. Its profit is carried into Retained earnings in every report, so no closing journals are needed.

Opening balances

Enter balances from before your records start — fixed assets, accumulated depreciation, loans, capital, retained earnings — usually from last year's trial balance. Set the **Date of the opening balances**, add a line per account with a debit or credit, and click **Save opening balances**. Any difference goes to Opening balance equity. Debtors, creditors and stock come from their own documents, and bank opening balances are set on each cashbook account.

Category mapping

Each cashbook and supplier-bill category posts to a ledger account (for example Rent to Rent paid). Change the account in the **Posts to** column and click **Save mapping**. Entries that already used the category are re-posted as a reversal and a new journal.

TIP

Keep the cashbook's **Uncategorised** tab empty: uncategorised entries post to Suspense, which the ledger checks will flag for your accountant.

GOOD TO KNOW

The Accountant's area comes with plans that include Reports. Posted journals can never be changed or deleted — corrections are always a reversal plus a new entry.

Projects & analysis

Projects & analysis shows whether each job, contract, branch or department actually makes money. You tag invoices, supplier bills and expenses with a project or an analysis code, and ORYX Business works out revenue, costs, profit and budgets for each — straight from your accounting records.

The screenshot shows the ORYX Business interface. The left sidebar contains a navigation menu with categories: SALES (Quotes & invoices, Debtors, Customers & suppliers, Inventory, Point of sale, Bookings, Job cards), EXPENSES (Receipts & bills, Supplier bills, Bank inbox, Cashbook), PEOPLE (Payroll), ACCOUNTING (Accountant's area, **Projects & analysis**, VAT returns), PLANNING (Budgets, Recurring, Debts, Trackers & loans, Insights), and WORKSPACE (Documents, Reports, Tasks). The main content area is titled 'Projects & analysis' and includes a search bar, a '+ Create' button, and a '+ New project' button. Below the title, there are tabs for 'Projects', 'Reports', 'Dimensions & codes', and 'Payroll links'. Under the 'Projects' tab, there are filters for 'Active', 'Completed', 'Archived', and 'All'. Two project cards are displayed: 'Network upgrade — Karoo Clinic' (P-002) and 'Office fit-out — Acme' (P-001). Each card shows a table with Revenue, Costs, and Profit, and a progress bar indicating '0% of the cost budget used'.

Revenue	Costs	Profit
R 6,500.00	R 0.00	R 6,500.00

Revenue	Costs	Profit
R 18,000.00	R 0.00	R 18,000.00

The Projects tab: one card per project with its revenue, costs and profit.

Projects and analysis codes

- A **project** collects the income and costs of one job, contract or client engagement. It has a customer, a person responsible, dates, a status and optional budgets.
- A **dimension** is another way to slice your figures — **Branch, Department, Division, Location, Cost centre, Region, Contract** or a **Custom** one of your own. Each dimension has a list of values (codes), such as "Cape Town" and "Durban" for Branch.

You can use several at once: an invoice can belong to Project Alpha, the Centurion branch and the Sales department.

What you see on the page

Open **Accounting** → **Projects & analysis**. The tabs are **Projects**, **Reports**, **Dimensions & codes** and, if you use Payroll, **Payroll links**.

The **Projects** tab shows a card per project with its status, code, customer, and its **Revenue**, **Costs** and **Profit**. If a cost budget is set, a bar shows how much of it has been used (amber from 80%, red at 100%). Filter with **Active**, **Completed**, **Archived** and **All**, and choose a book at the top if you have more than one.

How to: create a project

- 1 In the menu, open **Accounting** → **Projects & analysis** and click **New project**.
- 2 Enter the **Project name** and, if you like, a **Code** such as P-0012.
- 3 Choose the **Business book** (if you have more than one), the **Customer** and who is **Responsible**.
- 4 Set the **Status** and the **Start** and **End** dates.
- 5 Optionally enter a **Revenue budget (R)**, **Cost budget (R)** and **Profit budget (R)**.
- 6 Add a **Description** and **Notes** if helpful, then click **Save**.

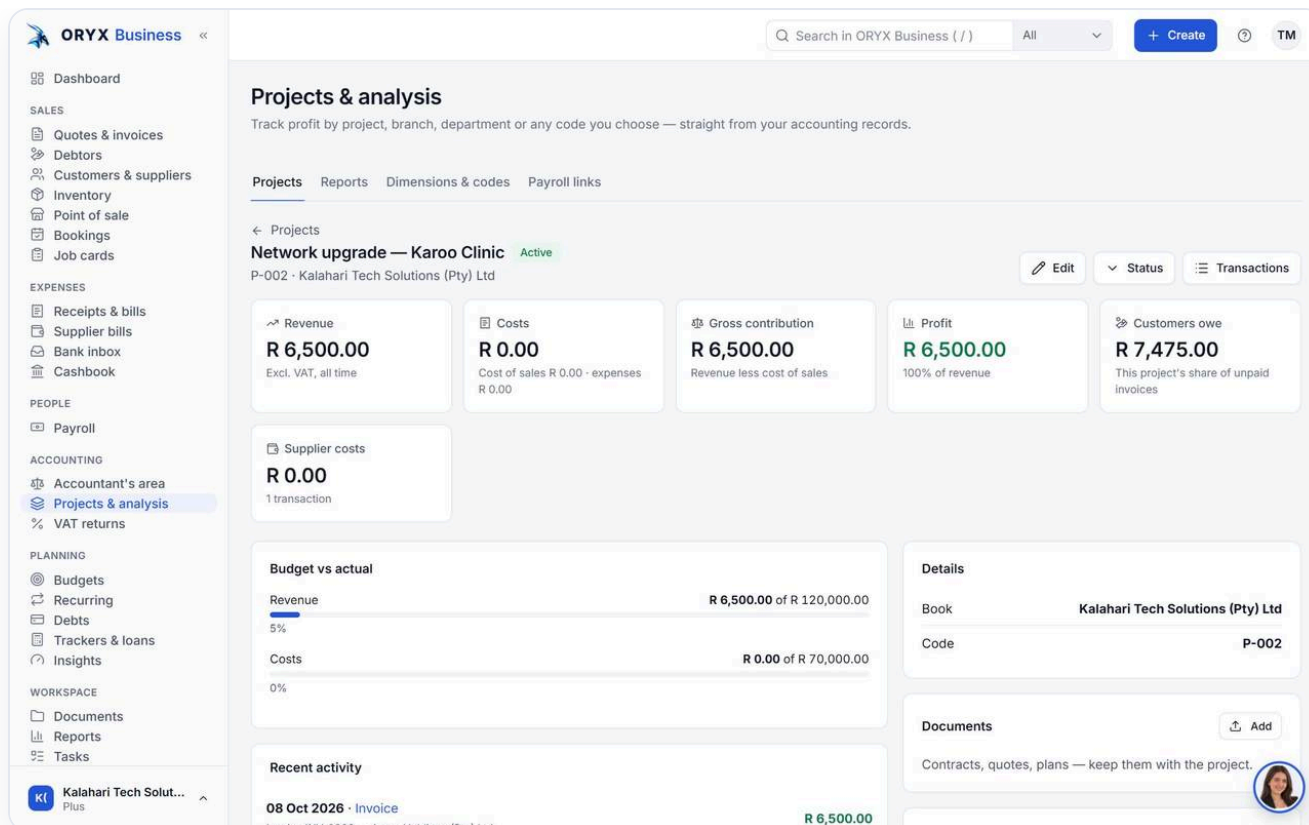
Tagging your transactions

Once projects or codes exist, a **Project & analysis** box appears on the screens where you record money: quotes, invoices and credit notes, supplier bills and credit notes, cashbook transactions, scanned receipts, customer and supplier payments, journal entries and stock received. It is a row of small drop-downs, one per dimension; a dimension with many values lets you type to search.

- What you choose at the top of a document applies to every line.
- On documents with lines, each line has a small tag. Click it to give that line its own project or code; leave a field on **As document** to follow the document. Click **Done** to close it.
- Records you do not tag stay **Unallocated** — reports show them as such and never guess.

How to: put a supplier bill on a project

- 1 Open **Expenses** → **Supplier bills** and click **New bill** (or edit a draft).
- 2 In the **Project & analysis** box, choose the project (and branch or department, if you use them).
- 3 If one line belongs elsewhere, click that line's tag and choose a different project.
- 4 Save the bill. Its costs now count towards the project.



A project's dashboard: figures, budget vs actual and recent activity.

A project's dashboard

Click a project card to open it.

- **Figures** — **Revenue** (excluding VAT), **Costs** (cost of sales and expenses), **Gross contribution**, **Profit** (with its percentage of revenue), **Customers owe** (this project's share of unpaid invoices) and **Supplier costs**.
- **Budget vs actual** — a bar for revenue, costs and profit against the budgets, showing how much is over.
- **Recent activity** — the latest documents posted to the project, with links to open them.
- **Details** — customer, responsible person, dates, book and code.
- **Documents** — click **Add** to keep contracts, quotes or plans with the project.
- **History** — who changed what, and when.

The buttons at the top are **Edit**, **Status** (**Mark completed**, **Put on hold**, **Archive**, **Reactivate**, **Reopen** or **Restore**, depending on where it is) and **Transactions**, which opens every ledger line of the project.

GOOD TO KNOW

Project figures come from the general ledger. If the ledger has not been started for the book yet, the dashboard says so with a link to **Start the ledger** (see the Accountant's area chapter). Tags you add before then are kept and count from the start.

An archived project can no longer be chosen on new transactions, but its history and reports stay.

Dimensions & codes

The **Dimensions & codes** tab lists your dimensions on the left and the values of the selected one on the right, with each value's code, book and status.

How to: add branches (or any other dimension)

- 1 Open the **Dimensions & codes** tab and click **Add dimension**.
- 2 Choose the **Kind** (for example Branch) and check the **Name**, then click **Save**.
- 3 With the new dimension selected, type a value such as "Cape Town" in the box below the list and click **Add**.
- 4 Repeat for each branch. Click the pencil on a value to change its **Name** or **Code**, limit it to one book under **Used in**, or untick **Active**.

Use **Rename** to rename a dimension and **Switch off** to stop offering it on new transactions — everything already tagged keeps it and reports still show it. A value that has been used cannot be deleted; make it inactive instead. Projects are added and changed on the **Projects** tab.

Payroll links

If you run payroll, the **Payroll links** tab connects your payroll departments, cost centres or branches to analysis values, so salaries are split across them when pay runs post. Choose the value under **Posts salaries to** for each payroll unit and click **Save links**. Payroll units themselves are set up under **Payroll** → **Settings**.

Projects & analysis
Reports from your general ledger, by any project or analysis code.

Projects Reports Dimensions & codes Payroll links

Profit by dimension
Revenue, costs and profit side by side — per project, branch, department...

Profit & loss by dimension
The full income statement with a column per value.

Budget vs actual
Each project's revenue, cost and profit against its budgets.

Customer revenue
Who you earned from, per project or code.

Supplier costs
Who you spent with, per project or code.

Transaction detail
Every ledger line for a code, traced to its document.

Compare by: Project Period: This financial year to From: 2026/03/01 To: 2026/10/11 Project: All Branch: All

Department: All Customer / supplier: All Account: All

Run

Download: CSV Excel PDF

Profit by project - 1 Mar 2026 to 11 Oct 2026

Project	Revenue	Cost of sales	Gross profit	Expenses	Profit	Margin
Network upgrade — Karoo Clinic	R 6,500.00	R 0.00	R 6,500.00	R 0.00	R 6,500.00	100%
Office fit-out — Acme	R 18,000.00	R 0.00	R 18,000.00	R 0.00	R 18,000.00	100%
Unallocated	R 707,323.71	R 119,579.86	R 587,743.85	R 418,269.45	R 169,474.40	24%
Total	R 731,823.71	R 119,579.86	R 612,243.85	R 418,269.45	R 193,974.40	24%

Click a row to see its transactions. Amounts exclude VAT. "Unallocated" is everything posted without this dimension.

Profit by dimension: revenue, costs and profit side by side.

Reports

On the **Reports** tab, choose a report, set the filters and click **Run**. Every report downloads as **CSV**, **Excel** or **PDF**. Click a row to see the transactions behind it. Amounts exclude VAT.

Report	What it shows
Profit by dimension	Revenue, costs and profit side by side — per project, branch, department ...
Profit & loss by dimension	The full income statement with a column per value.
Budget vs actual	Each project's revenue, cost and profit against its budgets.
Customer revenue	Who you earned from, per project or code.
Supplier costs	Who you spent with, per project or code.
Transaction detail	Every ledger line for a code, traced to its document.

The filters are **Book**, **Compare by** (the dimension to show as columns), **Period** (this financial year to date, this financial year, last financial year, this month, last month, all time or custom), **From** and **To**, a drop-down per dimension, and a customer or supplier.

In the Accountant's area overview, the **Show** drop-down also recalculates the main figures for a single project or code.

Who can do what

- Owners, administrators and accountants can do everything, including adding dimensions and payroll links.
- Members can do everything except manage dimensions.
- The **Sales** and **Receipt capture** roles can see the projects and codes and choose them on what they capture, without seeing profit figures.
- Viewers can see projects, figures, reports and budgets.

TIP

Agree with your team which dimensions you need before you start — two or three well-used ones (say Project and Branch) give clearer reports than many half-used ones.

GOOD TO KNOW

Changing the project on a document that is already posted is recorded as a correction in the ledger, so the change stays visible.

VAT returns

VAT returns works out your VAT201 for every tax period from what you already record — invoices, credit notes, supplier bills, cashbook entries and journals — and lays it out field by field, the way SARS eFiling asks for it. You check the figures, add the few things ORYX Business cannot know, file on eFiling, and mark the return as submitted.

Before you start

- VAT returns belong to a business book that is registered for VAT. Enter the book's **VAT number** under **Settings** → **Organisation profile** (choose the book at the top of the profile if you have more than one). Until then the page shows **Not registered for VAT**.
- The VAT rate (15%) is set under **Settings** → **Organisation profile** as **VAT rate (%)**; only an administrator can change it.
- Check the **VAT settings** on this page once (see below), so the tax periods match your registration.

VAT returns

Your VAT201 figures for each tax period, worked out from your invoices, bills and cashbook.

Category B · invoice basis

Tax Period	Status	Amount
Sep 2026 – Oct 2026 01 Sept 2026 – 31 Oct 2026	In progress	
Jul 2026 – Aug 2026 01 Jul 2026 – 31 Aug 2026 · SARS ref DEMO-20260701	Submitted	paid R 25,525.44
May 2026 – Jun 2026 01 May 2026 – 30 Jun 2026	Ready to file	
Mar 2026 – Apr 2026 01 Mar 2026 – 30 Apr 2026	Ready to file	
Jan 2026 – Feb 2026 01 Jan 2026 – 28 Feb 2026	Ready to file	
Nov 2025 – Dec 2025 01 Nov 2025 – 31 Dec 2025	Ready to file	
Sep 2025 – Oct 2025 01 Sept 2025 – 31 Oct 2025	Ready to file	
Jul 2025 – Aug 2025 01 Jul 2025 – 31 Aug 2025	Ready to file	

The list of tax periods, with the status of each return.

What you see on the page

Open **Accounting** → **VAT returns**. If you have more than one business book, choose it in the drop-down at the top right. The line at the top shows your VAT category and whether you are on the invoice or payments basis, followed by a list of tax periods, newest first. Each period shows its dates, any SARS reference, and its status:

Status	What it means
In progress	The period has not ended yet; the figures keep changing as you record more.
Ready to file	The period has ended and the return has not been marked as submitted.
Submitted	You marked it as submitted. The amount paid (or the refund) is shown next to it.

Click a period to open its return.

VAT returns
Your VAT201 figures for each tax period, worked out from your invoices, bills and cashbook.

Sep 2026 – Oct 2026
Kalahari Tech Solutions (Pty) Ltd · VAT no 4870261934 · 01 Sept 2026 – 31 Oct 2026

VAT payable
R 19,124.26
Field 20

CALCULATION OF OUTPUT TAX

1	Standard rate (excluding capital goods/services and accommodation) — consideration incl. VAT	R 210,461.75	Details
1A	Standard rate (only capital goods and/or services) — incl. VAT	0.00	
2	Zero rate (excluding goods exported)	R 0.00	
2A	Zero rate (only exported goods)	R 0.00	
3	Exempt and non-supplies	R 0.00	
4	Output tax on field 1	R 27,451.54	Details
4A	Output tax on field 1A	R 0.00	
5	Accommodation exceeding 28 days (excl. VAT)	0.00	
6	60% of field 5	R 0.00	
7	Accommodation not exceeding 28 days (excl. VAT)	0.00	
8	Field 6 + field 7	R 0.00	

A VAT201 return: output tax, input tax and the amount payable or refundable.

The return

At the top you see the period, the book, its VAT number and dates, and a large box with **VAT payable** or **Refund due to you** (field 20). Below that the return follows the VAT201 layout in two parts: **Calculation of output tax** (fields 1 to 13) and **Calculation of input tax** (fields 14 to 20). Click **Details** next to a field to see every invoice, bill, cashbook entry or journal that makes up the amount, with a link to open it.

What is included

Field	Where the figure comes from
1 and 4	Standard-rated lines on your invoices (including VAT) and the VAT on them, plus cashbook income with VAT that is not a payment of an invoice.
2	Zero-rated invoice lines. Invoice lines with no VAT at all are counted here too, with a warning to check whether they are exempt instead.
3	Exempt and no-VAT invoice lines.

12	VAT on supplier credit notes you received.
14	VAT on supplier bills and cashbook expenses in a "capital goods" category (by default, Equipment).
15	VAT on all other supplier bills and cashbook expenses. Supplier payments are not counted a second time.
18	VAT on credit notes you issued to customers.
Totals	Fields 4A, 6, 8, 9, 11, 13 (total output tax), 19 (total input tax) and 20 (13 minus 19) are worked out for you.

Journal entries with a VAT type that your accountant posts in the Accountant's area are included in the right fields as well.

Fields you fill in yourself

Some amounts cannot be known from your records: capital goods sold (**1A**), accommodation (**5** and **7**), change in use and second-hand goods exported (**10**), imported goods (**14A** and **15A**), change in use (**16**) and bad debts (**17**). While the return is not submitted, these fields have a box to type in. You can also add to fields 12 and 18; anything ORYX Business already found is shown next to the box (" + R ... from ORYX Business").

How to: review and file a VAT return

- 1 In the menu, open **Accounting** → **VAT returns** and click the period marked **Ready to file**.
- 2 Read any blue notes at the top — for example lines without a VAT type, or rounding differences.
- 3 Go through the fields. Click **Details** on any amount that looks wrong and open the document to fix it at the source.
- 4 Type in any of the fields that apply to you (accommodation, imports, change in use, bad debts).
- 5 Check the **Basis** and add **Notes** if you want to remember something, then click **Save**.
- 6 If you want a copy, download it as **CSV**, **Excel** or **PDF**.
- 7 Capture the figures on SARS eFiling and submit the return there.
- 8 Back in ORYX Business, click **Mark as submitted to SARS**, enter the **SARS reference** if you have it, and click **Mark as submitted**.

CAREFUL

ORYX Business does not send the return to SARS for you. Marking it as submitted only records that you filed it on eFiling, and keeps the figures you filed.

After submitting

A submitted return keeps its figures. If anything dated in that period changes later — an invoice edited, a bill added — a warning on the return names the fields that changed. Click **Reopen**, give a reason (it is kept in the audit trail), and look at the new figures; you may need to file a correction with SARS. If your accountant runs the ledger, marking a return as submitted also posts the VAT to the VAT payable account, and the **VAT reconciliation** report in the Accountant's area compares the ledger with your returns.

VAT settings

How to: set your VAT category and basis

- 1 On the VAT returns page, click **VAT settings**.
- 2 Choose your **VAT category (tax period)** as on your VAT registration (VAT103): **A** or **B** every two months, **C** every month, **D** every six months, or **E** every year.
- 3 Choose the **Accounting basis: Invoice basis (most vendors)** or **Payments basis (only if SARS approved it)**.
- 4 Under **Capital goods**, tick the expense categories whose VAT belongs in field 14 (for example Equipment or Vehicles).
- 5 Click **Save**. The list of periods is rebuilt for the new category.

On the invoice basis, VAT counts when an invoice or bill is dated. On the payments basis it counts when the money moves. You can also switch the basis for a single return with the **Basis** drop-down on that return.

TIP

The more of your spending is captured with the right VAT (supplier bills with VAT lines, receipts with **Price includes VAT** ticked), the bigger your input tax claim. Scan every slip that shows VAT.

GOOD TO KNOW

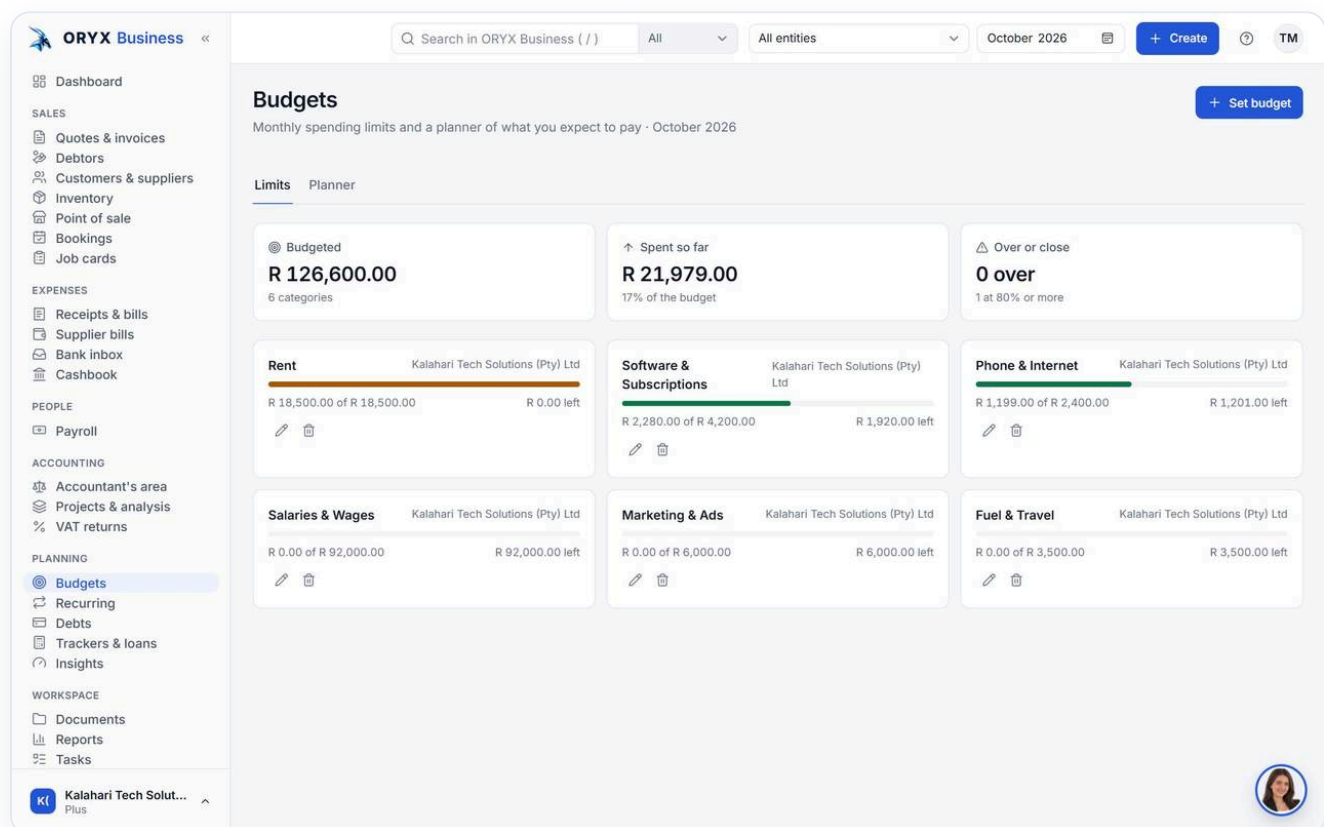
Everyone who can see reports can view VAT returns and download them. Saving, marking as submitted, reopening and changing the VAT settings needs a role that may edit the books (owner, administrator, accountant or member). Once your accountant locks a period, its return can no longer be changed.

Planning: budgets, debts, trackers and insights

The pages in the **Planning** part of the menu help you look ahead: set spending limits and plan your monthly costs, work out the fastest way to clear your debts, follow the money spent on a vehicle or a loan, and find the subscriptions and debit orders hiding in your bank statements. They work for a business and for personal or household books alike.

Budgets

Open **Planning** → **Budgets**. The page has two tabs: **Limits**, a monthly spending limit per category, and **Planner**, a list of what you expect to pay each month compared with what you actually paid. Use the period box in the top bar to choose the month, and the business drop-down next to it to look at one book or **All entities**.



Budget limits: how much of each category's monthly limit has been spent.

Limits

At the top you see **Budgeted** (the total of your limits), **Spent so far** (and what percentage of the budget that is) and **Over or close** (how many categories are over their limit, and how many are at 80% or more). Below is a card per category with a bar, "R ... of R ...", and either how much is **left** or how much you are **Over by**. The bar turns amber at 80% and red when you go over.

How to: set a monthly budget

- 1 In the menu, open **Planning** → **Budgets** and stay on the **Limits** tab.
- 2 Click **Set budget**.
- 3 Choose the **Entity** (business or book) and the expense **Category**.
- 4 Enter the **Monthly limit (R)**.
- 5 Tick **Share — visible to everyone in your organisation** if other users should see this budget.
- 6 Click **Save**. Spending in that category is counted against the limit from your cashbook.

Use the pencil on a card to change the limit, or the bin to remove it — your transactions are not affected.

Planner

The planner is a worksheet of the costs you expect every month — rent, the car repayment, insurance, subscriptions — compared with what you actually spent in the same category in the chosen month. The cards show **Projected**, **Actual**, the **Difference** (under or over plan) and **Projected / year**. Items are grouped automatically by their category into sections such as Home, Transportation, Health, Debt & Savings and Business & Operations, each with its own projected, actual and difference.

How to: add a planned monthly cost

- 1 On the Budgets page, open the **Planner** tab and click **Add planned item**.
- 2 Choose the **Entity** and type the **Item**, for example "Office rent".
- 3 Choose the **Category** — without one, the **Actual** column cannot be filled in.
- 4 Enter the **Monthly cost (R)**.
- 5 If it repays a loan, choose it under **Repaying which loan?** (loans are created under Trackers & loans).
- 6 Add **Notes** if you like, leave **Active** ticked, and click **Save**.

Untick **Active** to pause an item without deleting it; it is shown faded with a **Paused** badge. The planner is for planning only — it never creates transactions.

Debts & payoff plan

Open **Planning** → **Debts**. Here you list every loan, credit card, store account or other debt you owe, record what you pay, and let the payoff planner show how quickly you can be debt-free.

ORYX Business «

Search in ORYX Business (/) All + Create ? TM

Debts & payoff plan + Add debt

Every loan, card and account you owe, and the fastest way to pay them off.

Total debt
R 265,150.00
3 active debts

Minimum each month
R 10,300.00
across all debts

% Interest each month
R 2,736.42
what waiting costs you

Paid off so far
R 0.00
recorded payments

Active	Paid off	All			
Creditor	Balance	Rate	Min / month	Due	Progress
Nedbank credit card <small><svg class="i" aria-hidden="true"><use href="#i-credit-card"/></svg>Credit card</small>	R 14,250.00	19.5%	R 950.00	On the 20th	53% of R 30,000.00
FNB Business overdraft <small><svg class="i" aria-hidden="true"><use href="#i-landmark"/></svg>Loan</small>	R 38,500.00	13.3%	R 1,500.00	On the 1st	23% of R 50,000.00
WesBank — Hilux 2.4 GD-6 <small>Vehicle finance</small>	R 212,400.00	11.8%	R 7,850.00	On the 15th	45% of R 389,000.00

Payoff planner See how quickly you can be debt-free

Total I can pay per month (R) Strategy Avalanche — highest interest first (cheapest)

Debt-free by
May 2029
31 months

Total interest you'll pay
R 43,868.68
same as other strategy

vs minimums only
0 months sooner and R 0.00 less interest than paying only minimums

PAYOFF ORDER

1. Nedbank credit card - Apr 2028 2. FNB Business overdraft - Dec 2028 3. WesBank — Hilux 2.4 GD-6 - May 2029

Debts & payoff plan: your debts and the planner that shows when you will be debt-free.

The cards at the top show **Total debt**, **Minimum each month**, **Interest each month** ("what waiting costs you") and **Paid off so far**. The table lists each debt with its **Creditor** and type, **Balance**, interest **Rate**, **Min / month**, the **Due** day and a **Progress** bar. Filter with **Active**, **Paid off** and **All**.

How to: add a debt

- 1 In the menu, open **Planning** → **Debts** and click **Add debt**.
- 2 Enter who it is **Owed to (creditor)** and choose the **Type**: Loan, Credit card, Store account, Vehicle finance, Bond, Personal surety, SARS / tax debt or Other.
- 3 Choose the **Entity** it belongs to and, optionally, a **Linked contact**.
- 4 Enter the **Current balance (R)** and the **Original amount (R)** (if you leave it empty, the balance is used).
- 5 Enter the **Interest rate (% per year)** (0 for interest-free), the **Minimum payment / month (R)** and the **Due day of month**.
- 6 Add **Notes** such as the account number, and click **Save**.

How to: record a debt payment

- 1 On the debt's ... menu, click **Record payment**.
- 2 Check the **Amount (R)** (it starts at the minimum payment) and the **Date**.
- 3 Leave **Also book as expense from account** ticked and choose the **Account** if the payment should also appear in your cashbook. Untick it if it is already there.
- 4 Add a **Note** if you like and click **Record payment**. The balance goes down; when it reaches zero you see **Debt fully paid off!**

Click a debt (or ... → **Payment history**) to see every payment recorded on it. To remove a debt you no longer track, edit it and click **Archive**; its payment history stays.

The payoff planner

Under the table, the **Payoff planner** works out a month-by-month plan for your active debts. Enter **Total I can pay per month (R)** and choose a **Strategy**:

- **Avalanche — highest interest first (cheapest)**: every debt gets its minimum, and everything extra goes to the debt with the highest interest rate.
- **Snowball — smallest debt first (quick wins)**: the extra goes to the smallest balance first, so debts disappear sooner.

The planner then shows **Debt-free by** (the month and the number of months), the **Total interest you'll pay** and how much that saves compared with the other strategy, how it compares with paying only the minimums, the **Payoff order** with the month each debt is cleared, and a chart of your total debt going down. If your amount is below the combined minimums, a warning says some debts will fall behind; if it can never pay off the debts, the planner tells you to increase the monthly amount.

TIP

Try a few amounts in **Total I can pay per month** — even a small increase above the minimums often brings the debt-free date forward by months and saves a lot of interest.

Trackers & loans

Open **Planning** → **Trackers & loans**. A tracker or loan is a bucket you link transactions to, from any account or book:

- A **Tracker** totals everything linked to it — for example all the costs of a vehicle, a renovation or one child.
- A **Loan** keeps a running balance: money out (what you lent or spent) minus money in (what was repaid). Use it for a loan to a family member or staff member, or money you lent the business.

The table shows each **Name**, its **Type**, what was **Spent**, what came back (**Repaid / in**) and, for loans, what is **Outstanding**.

ORyx Business

- Dashboard
- Sales
 - Quotes & invoices
 - Debtors
 - Customers & suppliers
 - Inventory
 - Point of sale
 - Bookings
 - Job cards
- Expenses
 - Receipts & bills
 - Supplier bills
 - Bank inbox
 - Cashbook
- People
 - Payroll
- Accounting
 - Accountant's area
 - Projects & analysis
 - VAT returns
- Planning
 - Budgets
 - Recurring
 - Debts
 - Trackers & loans**
 - Insights
- Workspace
 - Documents
 - Reports
 - Tasks

Search in ORYX Business (/)
All
+ Create
TM

Trackers & loans

Link transactions from any account to a bucket — a project, a vehicle or a loan. A tracker totals what is linked; a loan keeps a running balance.

+ New tracker or loan

Name ↑	Type ↕	Spent ↕	Repaid / in ↕	Outstanding ↕
Director loan — T. Nkosi <small>0 linked transactions</small>	Loan	R 0.00	—	R 0.00 ...
Hilux 2.4 GD -6 <small>0 linked transactions</small>	Tracker	R 0.00	—	— ...
Office fit-out — Menlyn <small>0 linked transactions</small>	Tracker	R 0.00	—	— ...

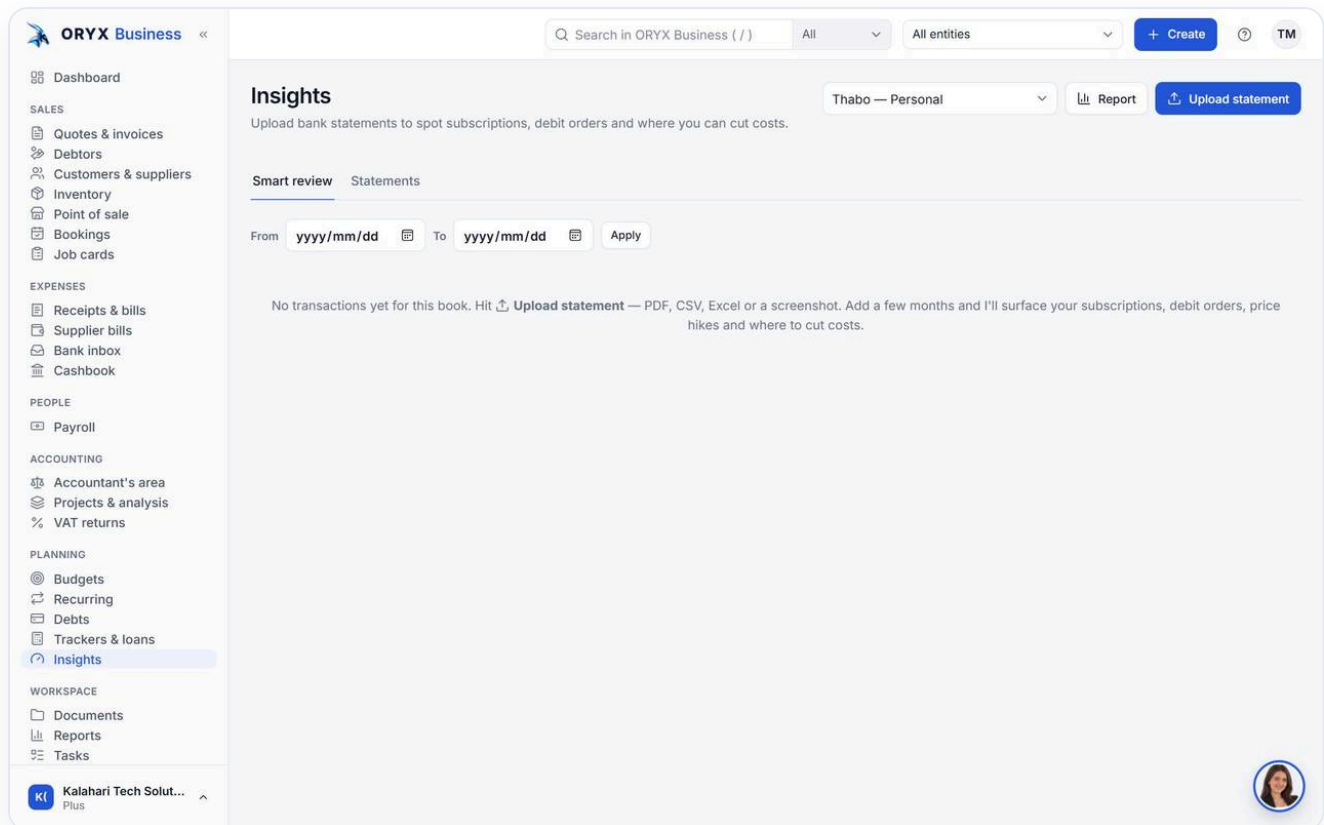
How to: create a loan and link payments to it

You can also link a whole imported bank statement with **Link all to a tracker or loan (optional)**, and point a planned budget item at a loan with **Repaying which loan?**. Click a tracker or loan to see all its linked transactions. To stop using one, edit it and click **Archive** — the transactions stay, they just lose the tag.

Trackers and loans are personal: each user sees only the ones they created.

Open **Planning** → **Insights**. Insights reads bank statements to find your recurring costs — subscriptions, debit orders and price increases — and shows what they add up to per month and per year. It is an analysis tool: statements uploaded here are kept separately and are **not** added to your cashbook (use

Import statement on the Cashbook page for that).



Insights: recurring payments found in your statements, per month and per year.

How to: find your subscriptions and debit orders

- 1 In the menu, open **Planning** → **Insights** and, if you have more than one book, choose the business at the top.
- 2 Click **Upload statement** and choose a PDF, CSV, Excel file or a screenshot of your statement. Upload a few months for the best results.
- 3 When you see **Added ... transactions**, the **Smart review** tab opens.
- 4 Look at the cards: **Recurring / month**, **Recurring / year**, **Subscriptions** and **Debit orders**.
- 5 Go through the **Recurring payments** list. For each merchant, set the **Type** (Subscription, Debit order, Once-off or Income) and a **Category**. Your choice is remembered and the totals update.
- 6 Use **From**, **To** and **Apply** to look at a shorter period, and **Clear** to go back to everything.

In the list, a **guess** tag means the type was suggested automatically and has not been confirmed by you yet. A **price ↑** tag means the amount has changed over time — a possible price increase worth checking. Each line shows the merchant, a sample description, when it was first and last seen, and the amount per month and per year.

Statements

The **Statements** tab lists every statement you uploaded with its period, source, number of lines and the money in and out. Use the eye to view its transactions, the document button to open the original file, and the bin to delete it with its lines.

How to: create an executive report

- 1 On the Insights page, click **Report**.
- 2 Choose the **From** and **To** dates.
- 3 Under **Statements to include**, untick any you want to leave out.
- 4 Click **Generate report**. A written summary of your income, spending and recurring costs appears.
- 5 Click **Print** to print it or save it as a PDF.

GOOD TO KNOW

Automatic detection of subscriptions, reading of scanned statements and screenshots, and the written report use AI reading. When it is not available for your organisation, a note on the page says so: CSV, Excel and text PDFs still work, and the report shows the numbers without the written narrative.

GOOD TO KNOW

Viewing these pages needs access to the books; adding or changing budgets, debts, trackers and statements needs a role that may edit the books (owner, administrator, accountant or member).

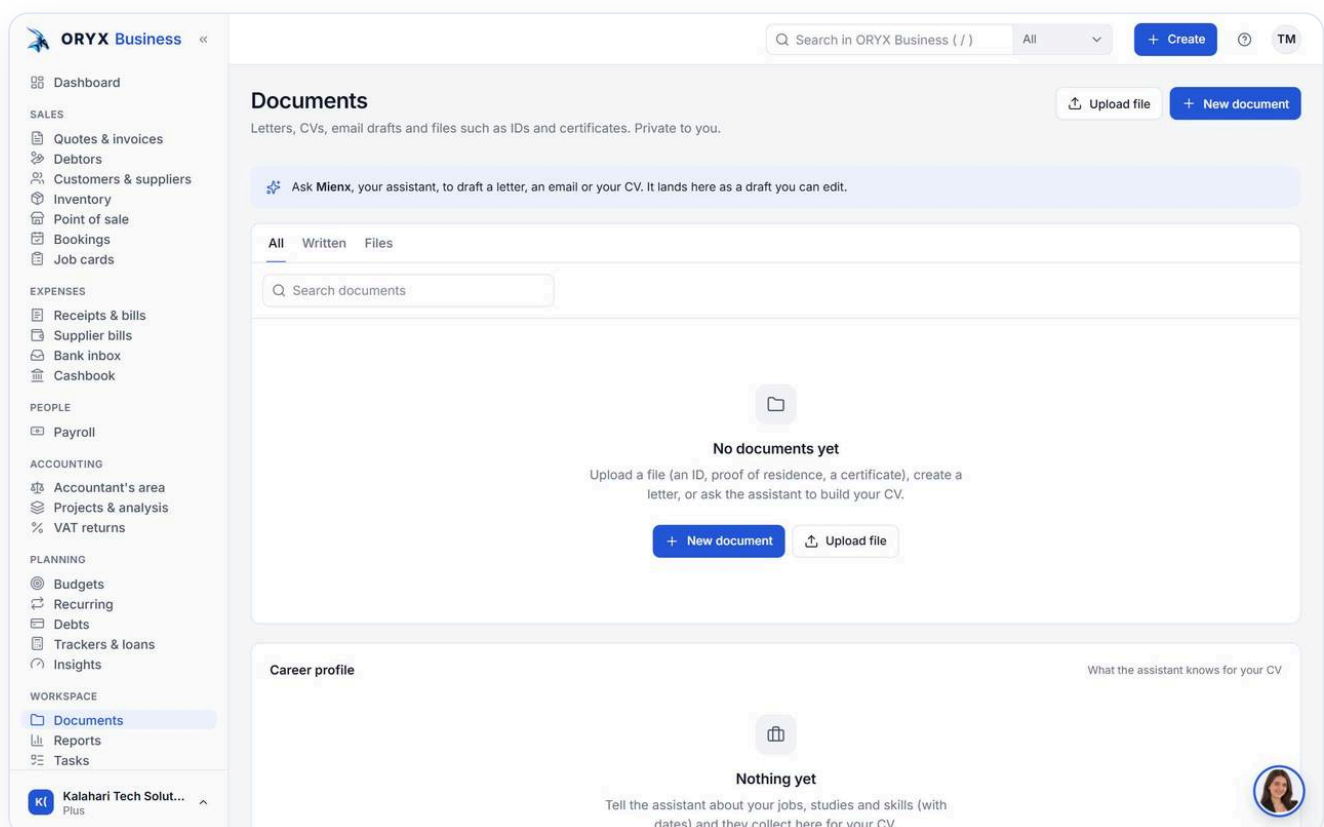
Workspace: documents, reports, tasks and more

The Workspace group in the menu holds the everyday office tools: your documents, a cash summary report, a to-do list, a calendar, an ideas board, a floating notepad and a phone. Everyone can use them, as far as your organisation has them switched on.

In the menu, the Workspace group lists **Documents, Reports, Tasks, Calendar, Ideas, Notes** and **Phone**. Notes and Phone are different from the rest: they open as small floating panels on top of the page you are on, so you can jot a note or make a call without losing your place.

Documents

Documents is your private filing cabinet for letters, CVs, email drafts and copies of important papers such as an ID or proof of residence. Other users in your organisation can't see your documents.



Documents: your letters, drafts and uploaded files, with the career profile below.

What you see

- Two buttons at the top: **Upload file** and **New document**.
- A list with **Title**, **Type**, **Status** (Draft, Sent or File) and **Updated**. Click a column heading to sort.
- Tabs to filter the list: **All**, **Written** (documents you typed or Mienx drafted) and **Files** (uploads), plus a **Search documents** box.

- A **Career profile** panel: facts about your work history that Mienx has collected for your CV. Click the bin next to a fact to remove it.

Click a written document to open it in the editor. Click an uploaded file to open it in a new tab. The menu at the end of each row has **Open** or **Download**, and **Delete**.

How to: write a letter or other document

- 1 In the menu, open **Workspace** → **Documents**.
- 2 Click **New document**.
- 3 Type a **Title** and choose the **Type: CV, Letter, Email draft** or **Document**.
- 4 Type the text in the big box. For headings start a line with #, for a bullet list start lines with -, and put ** around words for bold.
- 5 Click **Preview** to see how it looks, and **Edit** to go back to typing.
- 6 Click **Save**.

How to: print a document or save it as a PDF

- 1 In the menu, open **Workspace** → **Documents** and click the document.
- 2 Click **Print / PDF**. A neatly formatted copy opens in a new tab with the print window.
- 3 Choose your printer, or choose "Save as PDF" as the printer to keep a PDF copy.

How to: send an email draft

- 1 In the menu, open **Workspace** → **Documents** and click the email draft (Mienx's drafts land here too).
- 2 Check the **To** address, the **Subject** and the text, and click **Save** if you changed anything.
- 3 Open the draft again and click **Send email**. (The button appears once an email draft has been saved.)
- 4 Confirm. The status changes to **Sent**.

GOOD TO KNOW

Sending email needs email sending to be set up for ORYX Business. If it isn't, you get a message instead and nothing is sent.

How to: upload a copy of an important paper

- 1 In the menu, open **Workspace** → **Documents**.
- 2 Click **Upload file**.
- 3 In **What is it?**, type a name or pick a suggestion such as ID copy, Proof of residence or Tax certificate (IRP5).
- 4 Click **Choose a file** (or drop the file on the box). PDFs, photos and Word or Excel files up to 20 MB are accepted.
- 5 Click **Upload**.

CAREFUL

Deleting a document removes it for good, including any stored file.

TIP

Ask Mienx to "draft a letter to my landlord" or "build my CV". The draft appears in Documents for you to check, edit and send.

Reports

Reports gives a quick cash summary of one business: what you invoiced, what came in and went out of the bank, by category, for a month or a financial year.

What you see

Reports work on one business at a time, because adding businesses together would mix different books. If **All entities** is selected and you have more than one business, the page asks you to choose the book to report on.

- Period tabs: **Month** (the month in the top bar), **This financial year** (from the start of your financial year to today) and **Last financial year**.
- **Export CSV** (month view only) downloads the month's cashbook entries to open in Excel.
- Sales cards: **Invoiced**, **Credited** (credit notes), **VAT on sales** and **Owed to you now**.
- Cashbook cards: **Income**, **Expenses**, **Net cash flow**, and a VAT card. If you use VAT returns, the VAT card links to **Open VAT returns**.
- **Income** and **Expenses** tables by category, with the number of entries, the VAT portion and the amount.
- For a personal book: **Personal spending by family member**.

How to: see this year's figures for a business

- 1 In the menu, open **Workspace** → **Reports**.
- 2 Choose the business in the top bar (or click its button on the page).
- 3 Click **This financial year**.
- 4 Read the cards at the top, then the Income and Expenses tables per category.

How to: export a month to a spreadsheet

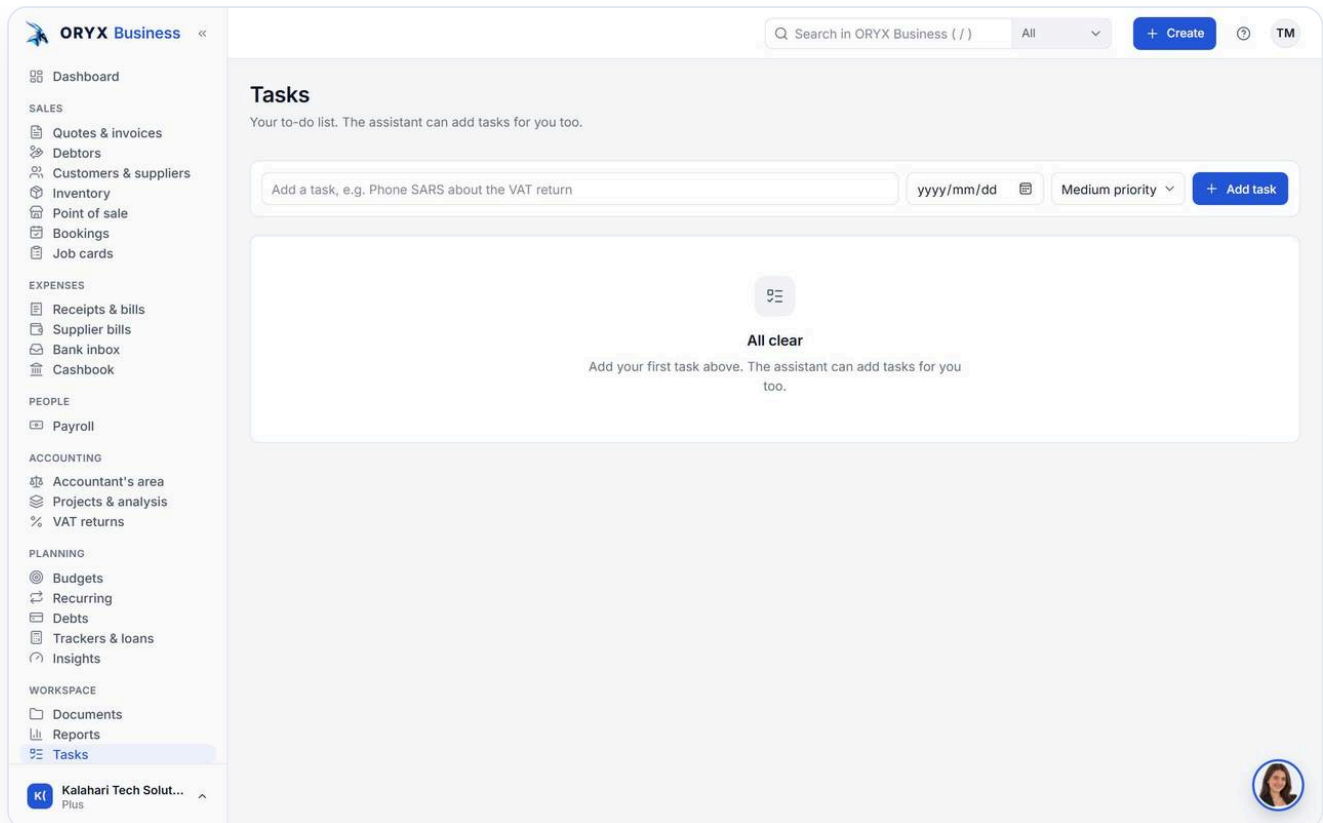
- 1 In the menu, open **Workspace** → **Reports**.
- 2 Choose the business and pick the month in the top bar.
- 3 Make sure **Month** is selected and click **Export CSV**.

GOOD TO KNOW

This report is on a cash basis: it counts money in and out of the business's bank and cash accounts in the period, amounts include VAT, and unpaid invoices are not counted. It is not an income statement. If you have the Accountant's area, the trial balance, income statement, balance sheet and general ledger are there.

Tasks

Tasks is your personal to-do list. Your tasks are private to you. Mienx can add tasks for you too, and tasks due today or overdue also appear on the Dashboard.



Tasks: add a task at the top; tasks are grouped by when they are due.

Tasks are grouped into **Overdue**, **Today**, **Upcoming**, **Someday** (no due date) and **Done** (the 15 most recent). A coloured dot shows the priority, and an overdue date is highlighted.

How to: add a task

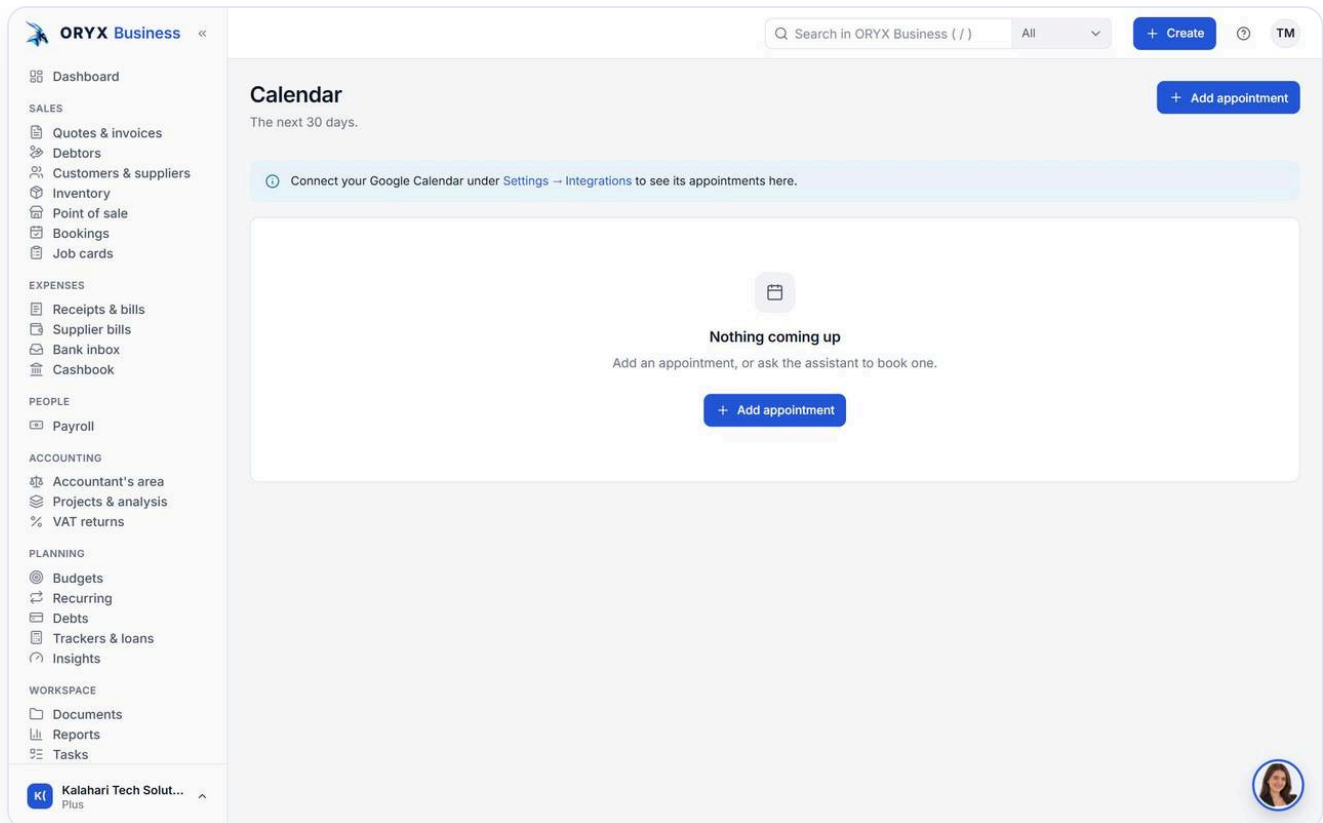
- 1 In the menu, open **Workspace** → **Tasks**.
- 2 Type the task in the box at the top, for example "Phone SARS about the VAT return".
- 3 Optionally pick a due date and a priority (**Medium priority**, **High priority** or **Low priority**).
- 4 Click **Add task**.

How to: complete, change or delete a task

- 1 In the menu, open **Workspace** → **Tasks**.
- 2 Tick the box in front of a task to mark it done. Untick it in the Done group to bring it back.
- 3 Click the pencil to edit the **Title**, **Notes**, **Due date** or **Priority**, then click **Save**.
- 4 Click the bin to delete a task, and confirm.

Calendar

The Calendar lists your appointments for the next 30 days, grouped by day, with today marked. If your organisation has connected Google Calendar, those appointments show here too, read-only.



Calendar: the next 30 days, day by day.

How to: add an appointment

- 1 In the menu, open **Workspace** → **Calendar**.
- 2 Click **Add appointment**.
- 3 Type a **Title**, and choose the **Start** date and time. **End (optional)**, **Location** and **Notes** are optional.
- 4 Click **Save**.
- 5 ORYX Business offers to add it to your Google Calendar as well: click **Add to Google Calendar** (it opens Google with the details filled in) or **No thanks**.

To change or remove an appointment you made in ORYX Business, use the pencil or bin on its row. Google Calendar appointments can only be changed in Google.

GOOD TO KNOW

An administrator connects Google Calendar under **Settings** → **Integrations**. The Calendar is for your own diary; customer appointments are handled in **Bookings**, if your organisation uses it.

Ideas

Ideas is a board for business ideas you want to keep, from the first spark to done. Like tasks, your ideas are private to you.

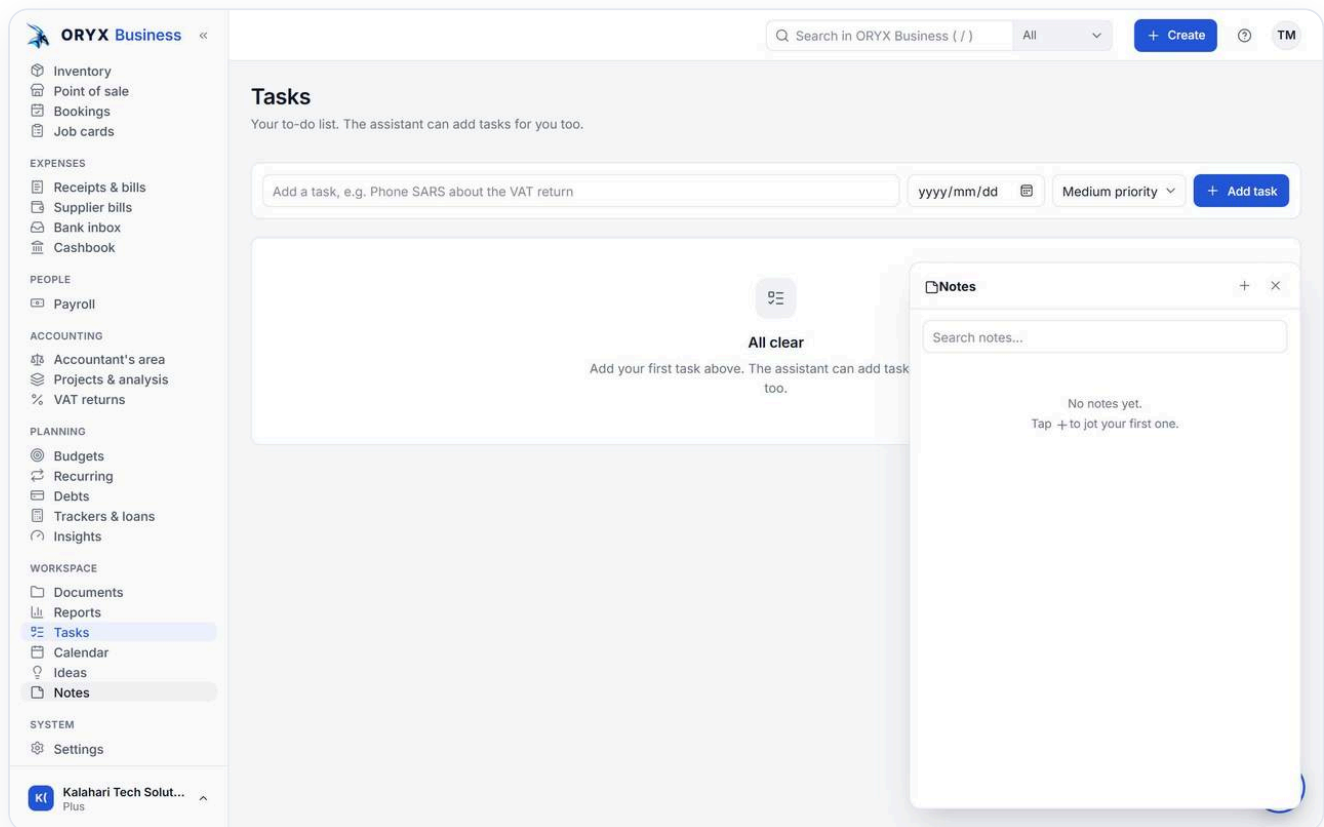
How to: capture and track an idea

- 1 In the menu, open **Workspace** → **Ideas**.
- 2 Click **New idea**.
- 3 Type a **Title** and the **Details**: what it is, who it is for, why now.
- 4 Choose a **Status**: **Spark**, **Exploring**, **Building**, **Parked** or **Done**.
- 5 Click **Save**. The idea appears as a card; click it any time to update the status.

When you open an existing idea you can also click **Make it a task**, which adds a task "Work on idea: ..." to your Tasks, or **Delete**.

Notes

Notes is a floating notepad for quick jottings: a phone number, what a customer said, a reminder. It opens on top of whatever page you are on, and saves as you type.



The floating notepad, open over another page.

How to: jot a note

- 1 In the menu, click **Workspace** → **Notes**. The notepad opens on the right.
- 2 Click **+** (**New note**).
- 3 Type a **Title** and your note. It saves by itself a moment after you stop typing ("Saved" flashes at the bottom).
- 4 Click **< All notes** to go back to the list, or **×** (or **Esc**) to close the notepad.

The list shows each note's title, the start of the text and when it was last edited. Type in **Search notes...** to find one. To delete a note, open it and click **Delete**; this cannot be undone.

Phone

Phone is a softphone: a dial pad in your browser that makes and receives calls through your company's phone system (PBX). It suits offices whose phone system supports calls from a web browser.

Setting up

An administrator first enters the phone system's details under **Settings** → **Integrations** → **Phone (softphone)** in the **PBX server** part. Then each person adds their own extension in the same place:

How to: set up your phone

- 1 In the menu, open **Settings** and choose **Integrations**.
- 2 Under **Phone (softphone)**, type your **SIP extension / user** (for example 1001), your **Display name** and your **SIP password**. Your phone system administrator can give you these.
- 3 Click **Save my phone**. When it shows "ready", you can make calls.

Making and taking calls

How to: make a call

- 1 In the menu, click **Workspace** → **Phone**. The dial pad opens; the status at the top should read **Ready**.
- 2 Type a number or extension, or type a name in **Find a CRM contact...** and click the customer or supplier to dial their number.
- 3 Click **Call**. The first time, allow your browser to use the microphone.
- 4 During the call use **Mute**, and the keypad for menu choices. Click **Hang up** to end the call.

You can also call a customer from **Customers & suppliers**: their row menu has **Call** followed by their number. When someone rings you, the dial pad opens by itself and shows the caller's name if the number belongs to a contact; click **Answer** or **Reject**.

GOOD TO KNOW

You can only receive calls while ORYX Business is open in your browser. If the status shows **Not set up**, add your extension first; if it shows **Login failed**, check your extension and password.

Mienx, your assistant

Mienx is the assistant built into ORYX Business. Ask her in plain English or Afrikaans, by typing or talking, who owes you money, how the month looks, or to make a quote and send it. She works with your real data and only does what your role allows.

The screenshot shows the ORYX Business dashboard for 'Kalahari Tech Solutions (Demo)' in October 2026. The dashboard includes a sidebar with navigation links for SALES, EXPENSES, PEOPLE, ACCOUNTING, and PLANNING. The main area displays financial summaries: Money in (R 42,879.20), Money out (R 21,995.68), Owed to you (R 253,270.10), and Cash position (R 144,332.80). A 'Cash flow' bar chart shows data from May to October. Below the chart is a 'Recent activity' section with transactions like 'MENT-000004 Cash' and 'Till 1: Banked at cash-up'. The Mienx chat panel is open in the bottom right corner, showing a greeting and a list of recent conversations.

The Mienx chat panel, opened from the round photo button in the bottom right corner.

Opening Mienx

Click the round photo button in the bottom right corner of any page (**Ask Mienx, your assistant**). The chat panel slides open. Click the button again, or the **x** in the panel, to close it. Your conversation stays while you move between pages.

The panel has:

Part	What it does
Header	Mienx · "your assistant · jou assistent", with three buttons: the speaker (spoken replies on or off), the bin (New conversation) and x (close).
Messages	Your questions on the right, Mienx's answers on the left. While she works you see "Thinking...".
Microphone	Talk instead of typing (see Talking to Mienx below).
EN / AF	The language Mienx listens for when you talk.

Ask or tell me
anything...

Type your message here and press **Enter** or the send button.

GOOD TO KNOW

You only see Mienx if your plan includes the AI assistant and your organisation has it switched on (an administrator can do this under **Settings** → **Modules, AI assistant**). She also needs the AI service to be connected on the ORYX Business platform; if it is not, you see a message instead of a reply. Contact support if that happens.

What Mienx can do

Mienx looks things up in ORYX Business rather than guessing, and she can do some of the work for you. What she can reach depends on your modules and your role: a person who can't see Debtors in the menu can't ask Mienx about debtors either.

Your money

- Income, expenses, the net result and account balances, for one business or all, for this month or another month.
- Search transactions by words in the description, business, month or type.
- Record income or an expense you tell her about ("I paid R 450 for diesel today"). For a personal book she asks who it was for: "Family" or a family member.
- List your debts with balances, interest rates and minimum payments.

Customers who owe you (Debtors)

- Who owes you money, how overdue it is, and the open invoices per customer.
- How much one customer owes.

Quotes and invoices

- Make a **draft quote** or **draft invoice** for a customer. She matches an existing customer by name or email, and adds the lines with quantity and price (excluding VAT), or uses a product's code (SKU) to take its price. She can add 15% VAT and set the payment terms.
- She reads the lines back to you before she creates the document, so check them.
- An invoice she makes stays a **draft** until it is sent.

Sending quotes and invoices

Mienx can send a quote, invoice or credit note:

- **By email**, to the customer's email address on file or an address you give her.
- **By WhatsApp**, to the customer's cell number on file, another number, or your own number.
WhatsApp messages are not sent automatically: Mienx gives you a  **Send on WhatsApp** button.
Tap it and WhatsApp opens with the message and link ready; you press send in WhatsApp.

Before she sends anything, Mienx reads back the document number, the total, exactly who it goes to and how, and waits for your "yes". A draft invoice is issued when it is sent.

If you want documents on your own WhatsApp, tell her your cell number once ("my WhatsApp number is 082 123 4567"); she remembers it.

Bookings

If you use Bookings: the appointments on a day or in a date range (with customer, service, staff member and status), finding a booking by customer name, phone or reference, and the free times for a service on a date, optionally with a particular staff member. Staff members only see their own diary.

Tasks, ideas and your calendar

- Add a task (with a due date and priority), list your open tasks, and mark a task done.
- Save an idea to your Ideas board.
- List your upcoming appointments (including a connected Google Calendar) and add an appointment to your Calendar.

Customers, suppliers and businesses

- Search your customers and suppliers.
- Create a new business or personal book for you.

Letters, email drafts and your CV

- Write letters and other documents. They land in **Workspace → Documents**.
- Draft emails. Mienx never sends email herself: the draft waits in Documents for you to check and click **Send email**.
- Build a CV. Whenever you tell her about a job, qualification, skill or achievement, she saves it to your **Career profile** (shown in Documents). Ask for a CV and she puts it together, suggests where to submit it in South Africa and offers a cover letter.
- Update a document she wrote earlier.

When Mienx shares a document, a  **Open document** button appears in the chat.

How-to help

Ask "How do I...?" and Mienx tells you which menu and button to use, step by step, pointing only to pages you can open.

GOOD TO KNOW

Mienx cannot look up salaries or payslips. Payroll information is only available in Payroll, to people with a payroll role.

Asking our team for help

When something isn't working, you're stuck, or you need a person (a plan or billing question), Mienx can log a support request with the ORYX Business team for you — she says so when she introduces herself.

How to: log a support request through Mienx

- 1 Open Mienx and describe the problem in your own words, for example "the PDF of my invoice shows the old logo".
- 2 She reads back the subject and the message she will send, and asks **Shall I log this?**
- 3 Say yes. She gives you the reference number and a 📄 **Open your support request** link.
- 4 Our reply arrives under **Help & support** and by email. Ask Mienx "any news on my support requests?" to see where they stand.

Example questions

- Who owes me money? / Wat is agterstallig?
- How much does Bester Bouwerke owe?
- How did Smit Plumbing do in September?
- What did we spend on fuel this month?
- I bought stationery for R 320 at PNA today, VAT included.
- Make a quote for Thandi Mokoena: 3 hours call-out at R 650 an hour plus a geyser element at R 480, add VAT.
- Make an invoice for ABC Logistics for 10 × product SKU PIPE-22, 30 days to pay.
- Send INV-0012 to the customer by email.
- Send QUO-0003 to my WhatsApp.
- What appointments do we have tomorrow? Is there a free time for a haircut on Friday with Lerato?
- Remind me to phone SARS on Monday, high priority.
- Book a meeting with the bank on 14 October at 10:00.
- Draft an email to my supplier asking for an updated price list.
- I worked at Goons IT as a technician from 2019 to 2023. Now build my CV.
- How do I add my logo to my invoices?

Talking to Mienx

In browsers that support speech (such as Chrome and Edge) you can talk instead of typing, and hear her answers.

How to: ask Mienx by voice

- 1 Open Mienx with the round photo button.
- 2 Check the language button: **EN** for English or **AF** for Afrikaans. Click it to switch.
- 3 Click the microphone button. The first time, allow the browser to use your microphone.
- 4 Speak. Your words appear in the box, and the message is sent when you stop talking.
- 5 To hear the replies, click the speaker button in the header. Click it again to switch spoken replies off.

TIP

If the microphone and language buttons are missing, your browser does not support speech input. You can still type.

Working safely with Mienx

How to: send an invoice through Mienx

- 1 Open Mienx and ask, for example, "Make an invoice for Thandi Mokoena for a geyser service, R 1 200, add VAT".
- 2 Check the customer and every line Mienx reads back, and answer "yes" or correct her.
- 3 She creates the draft invoice and tells you its number.
- 4 Ask "Send it to her by email" (or "on WhatsApp").
- 5 Mienx reads back the number, total and recipient. Answer "yes".
- 6 For email she confirms it is sent. For WhatsApp, tap  **Send on WhatsApp** and press send in WhatsApp.

- Mienx asks a short question when something is unclear, for example which business an expense belongs to.
- She never sends anything without your clear yes, and never sends ordinary emails herself.
- Anything she creates is a normal record in ORYX Business: check it on its page and change it like any other.

Starting a new conversation

Click the bin button in the header (**New conversation**) to clear the chat and start fresh. The conversation is also cleared when you reload the page or sign out, so Mienx does not remember earlier chats. Anything she created (invoices, tasks, documents) stays in ORYX Business.

TIP

Start a new conversation when you change topic. In a long chat Mienx only keeps the most recent messages in mind. If a request is too big, she may answer that she "took too many steps"; ask in smaller parts instead.

Settings

Settings is where you set up your organisation: the details printed on your documents, your businesses, who may sign in and what they may do, which modules you use, document numbering and design, bank accounts, connections to other systems and your own password. Most sections are for owners and administrators; everyone has **My account & security**.

Finding your way in Settings

In the menu, open **System** → **Settings** (or click the organisation button at the bottom of the menu and choose **Settings**). The sections are listed on the left in groups. You only see the sections your plan, modules and role allow:

Group	Section	Who sees it
Organisation	Organisation profile	Everyone (changes need the right role)
	Plan & billing	Everyone (only owners and administrators can change the plan)
	Users & roles	Owners and administrators
	Modules	Owners and administrators
Documents & finance	Documents & numbering	Owners and administrators, when you use Quotes & invoices
	Bank accounts & categories	When you use the Cashbook or Receipts & bills
Connections	Integrations	When you use the Bank inbox, Calendar or Phone, or your plan includes API access
You	My account & security	Everyone

On a phone you first see the list of sections; tap one to open it and use ◀ **Settings** to go back.

Organisation profile

These details appear on your quotes, invoices and statements. If you have more than one business, choose the business in the list at the top right of the panel first: each business has its own profile.

Organisation profile

These details appear on your quotes, invoices and statements.

Organisation name * Kalahari Tech Solutions (Pty) Ltd **Industry** — choose —

Organisation location South Africa **Province** Western Cape

[+ Organisation address & contact details](#)

Address
Unit 7, Techno Park
Stellenbosch
7600

Email on documents accounts@kalahari-tech.example **Phone** 021 555 0100

Website
kalahari-tech.example

Tax & registration

VAT number — leave blank if not VAT registered **Company registration number** 2019/482736/07

Financial year ends 4870261934 **VAT rate (%)**

Settings → Organisation profile: the details printed on your documents.

Field	What to enter
Logo	Upload logo... to add it (PNG, JPG or SVG, up to 1 MB); Remove to take it off. Shown on your quotes and invoices.
Organisation name *	The name on your documents. Required.
Industry, Province	Choose from the lists. The location is always South Africa.
Organisation address & contact details	Click to open: Address, Email on documents, Phone, Website.
VAT number	Leave blank if you are not VAT registered. Only a VAT-registered business prints "Tax invoice" and charges VAT.
Company registration number	For example 2020/123456/07.
Financial year ends	The month your financial year ends (for example End of February). Used for "This financial year" in reports and for numbering that restarts each year.
VAT rate (%)	The VAT rate, normally 15. Only owners and administrators can change it.
Bank details for payments	Bank, account name, account number and branch code, printed on invoices.

The regional settings are fixed: rand (ZAR), English, and South African time. Click **Save profile** when you are done. If the fields are greyed out, your role may look at the profile but not change it.

Businesses & books

Under the profile, **Businesses & books** lists every business and personal book you can see, with its type.

How to: add another business

- 1 In the menu, open **Settings** and choose **Organisation profile**.
- 2 Under **Businesses & books**, click **Add business / book**.
- 3 Type the **Name** and choose the **Type: Business** or **Personal**.
- 4 Choose a **Colour** and enter the **Opening balance (R)** of its bank account (a minus for an overdraft).
- 5 Click **Save**. Then choose the new business at the top of the profile and fill in its details.

Click the pencil next to a business to rename it or change its colour. In the same box:

- **Share with other users:** tick the people who may see and work in this book with you (administrators, and the person who created the book, can do this).
- **Family members** (personal books only): add the names you tag personal expenses to. "Family (household)" is always available.
- **Archive:** hides the business but keeps its history.

GOOD TO KNOW

Your plan sets how many businesses you can have. **Plan & billing** shows how many you use.

Plan & billing

Shows **Your plan**, its status (for example "Free trial · 9 days left", **Active**, **Payment overdue** or **Cancelled**) and what you use out of what the plan allows: **Users** and **Businesses**, and on a plan with usage limits each of them too (for example **Invoices this month 3 of 4**, **Customers 2 of 2**). If you were signed up by an adviser, their contact details are shown too.

Plan & billing

YOUR PLAN

Plus (Active)

Free
R 0 - free for as long as you like
Every module to try for as long as you like, with small monthly limits. No card needed.
[Move to Free](#)

Starter
R 99.00 /month excl. VAT
For sole traders and small businesses: unlimited quotes and invoices, receipts, bank statements, VAT and your accountant.
[Move to Starter](#)

Business
R 599.00 /month excl. VAT
For a growing business: Starter plus stock, a till, bookings, job cards, payroll and the accountant's area.
[Move to Business](#)

Current plan
Plus
R 999.00 /month excl. VAT
For businesses with more than one company or shop: everything, more tills and people, and API access.

Feature	Free	Starter	Business	Plus
Quotes, invoices, credit notes & debtors	✓	✓	✓	✓
Documents, letters & reports	✓	✓	✓	✓
Mienx, your AI assistant	✓	✓	✓	✓
Receipts (read automatically)	✓	✓	✓	✓
Supplier bills	✓	✓	✓	✓
Cashbook & bank statement import	✓	✓	✓	✓

Plan & billing: your plan, what you use, and the plans side by side.

Below that, a table compares the plans — **Free**, **Starter**, **Business** and **Plus**: the price per month (excluding VAT), every module each includes, and a **Limits** section (invoices and quotes a month, customers, products, employees, tills, questions to Mienx, users and businesses). Your plan is marked **Current plan**.

How to: change your plan

- 1 In the menu, open **Settings** and choose **Plan & billing** (or use **Plan & billing** in your profile menu).
- 2 Find the plan you want in the table.
- 3 On the Free plan, click **Upgrade to** During a trial, click **Switch to** Otherwise click **Upgrade to ...** or **Move to**
- 4 Confirm.

- **From the Free plan** the upgrade happens straight away: the limits lift at once, your data stays exactly as it is, and the new plan is billed monthly from that day.
- **During the trial** the switch happens straight away and ORYX Business reloads. Nothing is charged. Moving to a smaller plan hides the features it doesn't include; your data stays.
- **After the trial** your click sends a request. The ORYX Business team confirms the change and the new price with you before it takes effect. While it is waiting you can click **Withdraw request**.

GOOD TO KNOW

Only owners and administrators can change the plan. Others see "Ask an administrator to change the plan".

Users & roles

Owners and administrators decide who may sign in to the organisation and what each person may do. The list shows each user's **Name**, **Email** (with their sign-in method), **Role** (with the businesses they can see) and **Last login**.

The screenshot shows the ORYX Business Settings page. The left sidebar contains a navigation menu with categories like SALES, EXPENSES, PEOPLE, ACCOUNTING, PLANNING, and WORKSPACE. The main content area is titled 'Settings' and has a sub-section 'Users & roles'. Below this, there's a table of users. The table has columns for Name, Email, Role, and Last login. Two users are listed: Thandi Mokoena (Owner) and Thabo Cashier (Member). The interface also includes a top navigation bar with a search bar and a 'Create' button.

Name	Email	Role	Last login
Thandi Mokoena (you)	dev@test.local Password	Owner sees everything	2026-10-11 21:25
Thabo Cashier	cashier@dev.test Password	Member (Full, Legacy) Thabo — Personal, Kalahari Tech Solutions (Pty) Ltd	2026-10-08 20:11

Settings → Users & roles: everyone who can sign in to your organisation.

How to: add a user

- 1 In the menu, open **Settings** and choose **Users & roles**.
- 2 Click **Add user**.
- 3 Type their **Name** and **Email (used to sign in)**, and choose a **Role** (see the table below).
- 4 Choose the **Sign-in method**: **Password only**, **Password or Google**, or **Google only**. The Google options are only available when Google sign-in is set up.
- 5 Type a starting **Password** (10 or more characters).
- 6 Under **Can see these entities**, tick the businesses this person may work in. (Administrators see everything, so this list is hidden for them.)
- 7 Click **Save**, then give the person their email address and password yourself. No invitation email is sent.

If the person already uses ORYX Business elsewhere, they are simply added to your organisation and keep their own password. Only they can change their name, email, password or sign-in method.

To change someone's role or businesses, click the pencil on their row. To remove their access, click **Deactivate** (the no-entry sign) and confirm; the row then shows as inactive. You can't deactivate yourself, and the owner always stays an administrator.

Roles

Role	What they can do
Owner	Everything, in every business. The person who created the organisation.
Administrator	Everything, in every business, including users, modules and the plan.
Accountant (runs the ledger)	Sales, stock, customers and suppliers, expenses (including approving them), the cashbook and reports, and the Accountant's area: journals, reviewing and posting them, the chart of accounts, opening balances and lock dates. Only in the businesses ticked for them.
Member (full, legacy)	Much the same as the accountant without running the ledger. Kept for older accounts.
Sales	Quotes, invoices, customers and suppliers, and looking up stock. Can choose a project or branch on what they capture, without seeing profitability.
Receipt capture	Capturing receipts and bills, and looking up suppliers.
Viewer (read-only)	Looks at the books, reports, sales, stock and expenses, but can't change anything.

Everyone, whatever their role, has their own Tasks, Ideas, Notes, Documents and Calendar, private to them.

GOOD TO KNOW

Three modules have their own access, set on their own pages rather than here:

- **Payroll:** salaries are private, so payroll access is granted separately even for owners and administrators. The owner (or a payroll administrator) gives people a payroll role in **Payroll** → **Settings** → **Access**.
- **Point of sale:** owners and administrators can do everything; give other staff a till role (such as Cashier, Supervisor or POS manager) in **Point of sale** → **People & PINs**.
- **Bookings:** owners and administrators have full access; give others a bookings role (Bookings manager, Receptionist or Staff member) in **Bookings** → **Settings** → **Access**.

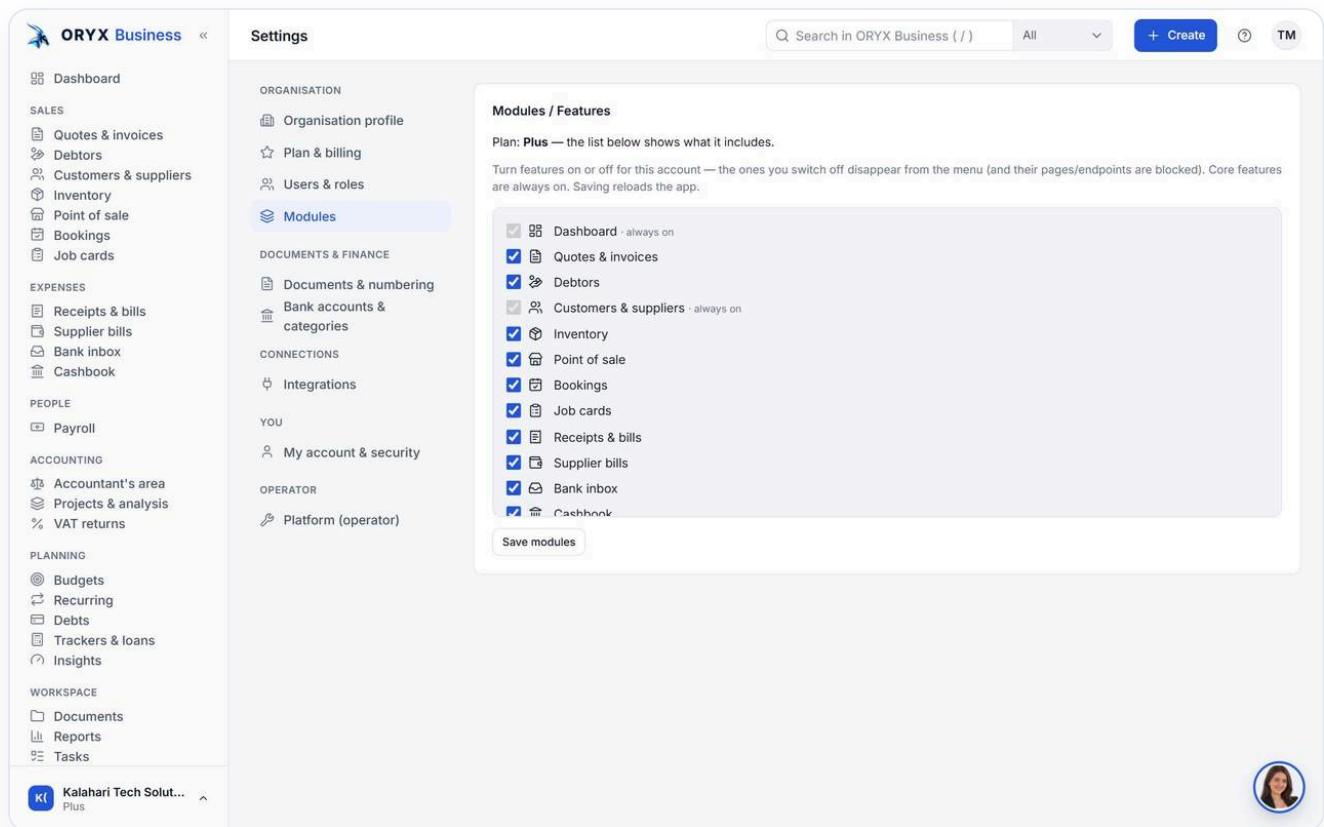
Add the person under **Users & roles** first.

CAREFUL

Your plan sets the maximum number of active users. When you reach it, deactivate someone or upgrade the plan before adding another person.

Modules

Modules lets owners and administrators switch features on or off for the whole organisation. A module you switch off disappears from everyone's menu, and its pages are blocked. Its data is never deleted: switch it on again and everything is still there.



Settings → Modules: tick the features your organisation uses.

How to: switch a module on or off

- 1 In the menu, open **Settings** and choose **Modules**.
- 2 Tick the modules you want, and untick the ones you don't use (for example Debts or Ideas).
- 3 Click **Save modules**. ORYX Business reloads with the new menu.

The list only shows what your plan includes. Core features (Dashboard, Customers & suppliers and Settings) are marked "always on" and can't be switched off. To get a module your plan doesn't include, change your plan under **Plan & billing**. The **AI assistant** (Mienx) is switched on and off here too.

Documents & numbering

For organisations that use Quotes & invoices. Three panels control how your documents are numbered and look.

Numbering

The table shows the next number for **Invoices**, **Quotes** and **Credit notes**, or "typed in by hand". Moving from Xero or Sage? ORYX Business carries on after the highest number you already have, or you can set the next number yourself.

How to: set your invoice numbers

- 1 In the menu, open **Settings** and choose **Documents & numbering**.
- 2 Next to **Invoices**, click **Change**.
- 3 Choose **Continue auto-generating invoice numbers**, then set the **Prefix** (for example INV-) and the **Next number**.
- 4 Optionally tick **Restart numbering at the start of each financial year**. You can put {FY} (financial year), {YYYY} or {YY} (year of the document) in the prefix.
- 5 Check the preview ("Next invoice: ...") and click **Save**.

Choose **Enter invoice numbers manually** instead if you want to type each number yourself. Recurring and converted documents still get the next automatic number.

Design, terms & payment details

How to: design your invoices and quotes

- 1 In the menu, open **Settings** and choose **Documents & numbering**.
- 2 Under **Invoice & quote design**, click **Design**.
- 3 Choose a **Layout** (**Classic**, **Header band** or **Compact**), a **Colour**, the **Font** and the **Logo size**.
- 4 Change the **Invoice title**, **Quote title** and **Credit note title** if you like.
- 5 Tick what to show: **Bank details on invoices**, **Product codes (SKU) column**, **"Accepted by" signature lines on quotes**.
- 6 Type your **Standard invoice terms**, **Standard quote terms** and **Footer**. Use the **Invoice / Quote / Credit note** tabs above the preview to check each one.
- 7 Click **Save design**. New and existing documents print with it. **Reset to default** goes back to the standard design.

Your logo, address, VAT number and bank details come from the **Organisation profile**. The customer's VAT number is always printed when it is on file.

Preferences

- **I give discounts on individual lines:** adds a Disc % column to quotes and invoices.
- **Default payment terms for new invoices:** **Due on receipt**, **7 days**, **14 days**, **30 days** or **60 days**.

Click **Save preferences**.

Bank accounts & categories

Accounts

The bank, cash, card and savings accounts of each business, with the opening balance and the current balance.

How to: add a bank account

- 1 In the menu, open **Settings** and choose **Bank accounts & categories**.
- 2 Under **Accounts**, click **Add**.
- 3 Choose the **Entity** (business), type the **Name** (for example FNB Business Account) and choose the **Type**: **Bank account**, **Cash**, **Credit card** or **Savings**.
- 4 Enter the **Opening balance (R)**.
- 5 If you use the Bank inbox, enter the **Bank-notification match**: the last digits of the account or card as your bank shows them in its alerts. Tick **Auto-add settled notifications for this account (skip review)** only if you trust those alerts without checking.
- 6 Click **Save**.

Click the pencil on an account to change it, or **Archive** to hide an account you no longer use.

Categories

The income and expense categories used in the cashbook, budgets and reports. Administrators can click **Add** or the pencil to set the **Name**, **Kind (Expense or Income)** and an **Icon (emoji)**.

Integrations

Connections between ORYX Business and other services. You see the panels for the modules you use.

Panel	What it is for
Bank inbox (auto-capture)	Shows Your personal forwarding address , with a Copy button. Set a rule in your email to forward your bank's payment alerts to this address, and they turn into transactions for you to review in the Bank inbox. Use the Bank-notification match digits on each account (above) so ORYX Business knows which account an alert belongs to.
API keys (external systems)	Owners and administrators, when the plan includes API access. Lets another system create quotes and contacts in this organisation. Click Generate , name the key and copy it straight away: it is shown only once. Click the no-entry sign to revoke a key; systems using it lose access.
Google Calendar	Administrators. Paste each calendar's Secret address in iCal format (in Google Calendar: Settings → your calendar → Integrate calendar), give it a name, and click Save calendars . Add calendar adds another row. The appointments then show, read-only, in the Calendar.

**Phone
(softphone)**

Each person enters their own **SIP extension / user**, **Display name** and **SIP password**, then clicks **Save my phone**. Administrators also see **PBX server**: the **WebSocket URL**, **SIP domain** and **STUN server** of your phone system, shared by all users, with **Test connection**. Your phone system must support calls from a web browser (WebRTC over a secure WebSocket). See the Phone section in the Workspace chapter.

My account & security

Everyone has this section. It shows your name, email and role, and lets you:

How to: change your password

- 1 In the menu, open **Settings** and choose **My account & security**.
- 2 Type your **Current password**.
- 3 Type a **New password** of 10 or more characters.
- 4 Click **Update password**.

- **Emails from ORYX Business**: tick or untick **Send me product news and offers**. It saves as soon as you click.
- **Appearance**: **Switch light / dark** changes between light and dark mode on this device.

TIP

You can also change your password from the profile menu (your initials, top right) with **Change password**.

Help & support

When you are stuck, ask the ORYX Business team. Help & support is where you send a question about plans and billing, how to do something, or something that isn't working, and where you read our replies. Everyone in your organisation can use it.

Opening Help & support

There are three ways in:

- Click the ? button in the top bar.
- Open the profile menu (your initials, top right) and click **Help & support**.
- On a phone, tap **More** and then **Help & support**.

Help & support

Search in ORYX Business (/) All Create ? TM

The ORYX Business user guide

Every page of ORYX Business, step by step — with pictures and numbered **How to** boxes for the jobs you do most: quotes and invoices, customers, stock, the till, bookings, payroll, bills, bank statements, VAT and more. Read it on screen, keep it on your phone or print it for your team.

[Download the user guide](#) [Open in a new tab](#) Version October 2026 · 156 pages · 10.2 MB

1. Getting started 2. Dashboard 3. Quotes & invoices 4. Debtors 5. Customers & suppliers 6. Inventory 7. Job cards 8. Recurring 9. Point of sale 10. Bookings 11. Payroll 12. Receipts & bills 13. Supplier bills 14. Bank inbox and statement import 15. Cashbook 16. Accountant's area 17. Projects & analysis 18. VAT returns 19. Planning: budgets, debts, trackers and insights 20. Workspace: documents, reports, tasks and more 21. Miex, your assistant 22. Settings 23. Help & support

How can we help?

Ask the ORYX Business team anything — plans and billing, how to do something, or something that isn't working. We reply here and by email. [+ New request](#)

Your requests

Reference	Subject	Topic	Status	Updated
08-1002	How do I add a second business? by Thandi Mokoena	General queries	Received	2026-09-30

Help & support: start a new request, and follow your earlier ones.

What you see

At the top, **How can we help?** with the **New request** button. Below it, **Your requests** lists the questions you have sent:

Column	Meaning
Reference	The request's reference. Quote it if you contact us another way.
Subject	What the request is about.

Topic	Sales, General queries or Technical support.
Status	Received (new), Open (we are working on it), Answered (we replied and are waiting for you) or Solved .
Updated	The date of the last change.

Owners and administrators also see the requests other people in the organisation sent, marked "by" with the person's name.

Messages from the team about the service (for example planned maintenance) may also appear in a bar at the top of every page.

Asking for help

The screenshot shows the 'New request' form in the 'Help & support' section of the ORYX Business application. The form is titled 'New request' and has a 'Topic' dropdown menu set to 'General queries'. The 'Subject' field contains the text 'e.g. How do I add my logo to invoices?'. The 'Message' field contains the text 'Tell us what you need. For a problem: what you did, what happened and any error message.'. Below the message field is a section for 'Screenshots or files (optional — up to 5, 5 MB each)' with a 'Choose Files' button and the text 'No file chosen'. At the bottom of the form are 'Send' and 'Cancel' buttons. The sidebar on the left lists various business modules: Dashboard, SALES (Quotes & invoices, Debtors, Customers & suppliers, Inventory, Point of sale, Bookings, Job cards), EXPENSES (Receipts & bills, Supplier bills, Bank inbox, Cashbook), PEOPLE (Payroll), ACCOUNTING (Accountant's area, Projects & analysis, VAT returns), PLANNING (Budgets, Recurring, Debts, Trackers & loans, Insights), and WORKSPACE (Documents, Reports, Tasks). The top right of the application shows a search bar, a 'Create' button, and a user profile icon.

A new request: choose a topic, describe what you need and attach screenshots.

How to: send a request to the ORYX Business team

- 1 In the top bar, click ? to open **Help & support**.
- 2 Click **New request**.
- 3 Choose the **Topic**: **Sales** (plans, pricing, buying), **General queries** (how-to and account questions) or **Technical support** (something not working).
- 4 Type a short **Subject**, for example "How do I add my logo to invoices?"
- 5 In **Message**, tell us what you need. For a problem: what you did, what happened, and any error message.
- 6 Optionally add **Screenshots or files**: up to 5 files of 5 MB each (pictures, PDF, text, CSV, Excel or Word).
- 7 Click **Send**. You get a reference number and the request opens.

GOOD TO KNOW

We see which organisation you are in and reply to the email address you sign in with. We reply on the request in ORYX Business and by email.

Following up

Click a request in **Your requests** to open the full conversation: your messages, the team's replies, any attached files (click one to open it) and the status. Some replies are marked **automated**: these come from our support assistant. If an automated answer doesn't help, just reply and a person takes over.

How to: reply to the team

- 1 In the top bar, click ? and click the request in **Your requests**.
- 2 Read the latest reply at the bottom of the conversation.
- 3 Type your answer in **Add a message**. Attach files under **Attach** if needed.
- 4 Click **Send**.
- 5 Click ← **All requests** to go back to the list.

If a request is **Solved** but you need more help, reply to it: replying reopens it.

When you can't sign in

The sign-in page has a **Need help? Contact support** link. It opens a support form you can use without signing in. For a forgotten password, use **Forgot your password?** on the sign-in page first (see Getting started).

This manual

You can download this manual as a PDF at any time: open **Help & support** (the ? at the top) and click **Download the user guide** at the top of the page — or **Open in a new tab** to read it in your browser. Keep a copy on your computer or print the chapters your staff need.

TIP

For a quick "how do I...?" while you work, ask Mienx, your assistant. She tells you which menu and button to use.

Glossary

Words you will meet in ORYX Business and this manual.

Term	Meaning
Accountant's area	The accounting part of ORYX Business: the general ledger, journals, chart of accounts and financial statements such as the trial balance, income statement and balance sheet.
Age analysis	A view of what customers owe, split by how long it has been outstanding. Shown in Debtors.
All entities	The choice in the top-bar business selector that combines all the businesses you can see.
Bank inbox	Where bank payment alerts you forward by email arrive as transactions waiting for you to confirm.
Business / book / entity	One set of books inside your organisation, with its own accounts, documents and reports. A Personal book is for household money.
Cash basis	Counting income and expenses when the money actually moves in or out of the bank, not when an invoice is issued.
Cashbook	The list of money in and out of each bank, cash and card account.
Category	A label for income or expenses (such as Fuel or Sales) used in the cashbook, budgets and reports.
Credit note	A document that reduces or cancels what a customer owes on an invoice.
Debtor	A customer who owes you money.
Draft	A document that is saved but not yet sent or issued.
EMP201 / EMP501 / IRP5	SARS payroll forms: the monthly employer declaration, the reconciliation, and the employee tax certificate.
Financial year	Your business's 12-month accounting year, ending in the month set in the Organisation profile (often February).
Input VAT / Output VAT	VAT you paid on expenses (you can claim it back) / VAT you charged on sales (you pay it over to SARS).

Job card	A record of work being done for a customer, from booking to invoicing.
Journal	An accounting entry made directly in the ledger, usually by an accountant.
Mienx	The AI assistant built into ORYX Business.
Module	A part of ORYX Business that can be switched on or off, such as Inventory or Payroll.
Opening balance	What an account held on the day you started using ORYX Business.
Organisation	Your ORYX Business account: the plan, the users and the shared settings. It holds one or more businesses.
Period	The month chosen in the top bar for the Dashboard, Cashbook, Budgets, Reports and Bank inbox.
Plan / trial	The subscription that decides which modules, how many users and how many businesses you have. New accounts start with a free 14-day trial.
Point of sale / till	Selling over the counter, with cashiers signing in to a till.
Prefix	The letters in front of a document number, such as INV- in INV-0012.
Quote	A price offer to a customer, which can be turned into an invoice once accepted.
Recurring invoice	An invoice that ORYX Business creates for you on a schedule, such as monthly.
Reference	The number of a support request.
Role	What a user may do in the organisation, such as Administrator, Sales or Viewer (read-only).
SKU	A product code, used to find a product and its price.
Statement	A summary sent to a customer of their invoices, payments and balance.
Stock take	Counting the stock you actually have and correcting the system's figures.
Supplier bill	An invoice you received from a supplier and must pay.
Tax invoice	An invoice from a VAT-registered business that shows VAT as SARS requires.
VAT201	The VAT return you submit to SARS. Prepared under VAT returns.