DairyBook User Guide

The complete manual for farmers, cooperative managers and field agents. Covers DairyBook version 1.13.0 | Android and iOS | Edition: September 2026

DairyBook KE Limited · dairybook.app

Contents

1. About this guide 3
2. Getting started 3
3. My Farm: the dashboard 5
4. Animals 9
5. Milk and production 13
6. Breeding and reproduction 17
7. Animal health 18
8. Feed and nutrition 20
9. Finance 20
10. Records: the reference library 23
11. Selling milk and serving customers 24
12. Team and access 25
13. Working offline and syncing 27
14. Settings 28
15. Alerts and notifications 30
16. Quick starts by role 30
17. Troubleshooting and common questions 31
Appendix A: Screenshot reference 32
Appendix B: Glossary 34
About this document 34

1. About this guide

DairyBook keeps your animals, milk, breeding, health, feed and finances in one app, on the phone in your pocket, and it keeps working when the network does not. This guide covers every part of the app: what each screen shows, how to record the things you do every day, and how the data moves between your phone and the rest of your team.

1.1 Who this guide is for

The manual is written for three groups of people. You can read it end to end, or jump to the quick-start for your role in section 16.

Reader	Where to start
Farmers	Sections 2 to 8 cover everything you do at the parlour and in the field: registering animals, recording milk, health, breeding and feed. Section 16.1 is a one-page daily routine.
Cooperative and farm managers	Add sections 9 (Finance), 11 (Selling milk and customers), 12 (Team and access) and 13 (Working offline). Section 16.2 is the monthly rhythm.
Field agents and trainers	Read the whole guide, then use section 16.3 for the onboarding sequence and section 17 for the questions farmers ask most.

1.2 How to read the instructions

Steps are written the way you would say them out loud. A phrase in bold is something you tap or type.

- **Tap** means press once with your finger.
- **Swipe up** or **scroll** means drag the screen up to see what is further down.
- **Bottom tabs** are the four buttons along the bottom of every main screen: My Farm, Animals, Finance, Records.
- **Top bar** is the row of small icons at the very top: alerts, help, sync and settings.

> **A note on screenshots.** The screenshots in this guide were captured from the live demo at demo.dairybook.app, using the sample Green Valley Demo Farm, with Text size set to L (Settings › Appearance) so the text is easier to read. Appendix A lists every figure with the exact screen and the taps needed to reach it, so you can find the same screen on your own phone.

1.3 What DairyBook is built to do

Most farm software assumes a good connection. DairyBook assumes the opposite. Every record is saved on the phone first and then synchronised when a signal appears, so a milking recorded in a parlour with no bars is never lost. Section 13 explains this in full.

2. Getting started

2.1 Installing the app

DairyBook is available for Android and iOS. Install it the same way you install any other app.

1. Open the Google Play Store (Android) or the App Store (iOS).
2. Search for DairyBook, or use the download links on dairybook.app.
3. Tap Install, and open the app when it finishes.
4. Allow notifications when the phone asks. Alerts about heat, calving and low stock arrive this way.

> **Tip.** The app is designed to be set up once and then used offline. Do the first-time setup where you have a connection, then take the phone to the parlour.

2.2 Trying it before you commit

A live demo of the full app runs at demo.dairybook.app in a web browser, loaded with a sample farm. It is the fastest way to show a new farmer what the app does, and nothing you tap there affects a real farm.

2.3 The four tabs

Everything in DairyBook sits behind four buttons at the bottom of the screen. Once you know what lives where, the rest of the app is easy to find.

Tab	What it holds
My Farm	The dashboard: today's figures, quick actions, alerts that need attention, and the production and finance charts.
Animals	The herd list, and the profile page for each individual animal.
Finance	Money in and out: overview, transactions, budgets and reports.
Records	The reference library: inventories, directories, price lists, reports, staff, equipment and compliance records.



Figure 1. The four bottom tabs, with My Farm selected.

2.4 The top bar

The same four icons appear at the top of the main screens.

Icon	What it does
Bell	Alerts. The red number is how many items need attention. Tap to open the alerts list (section 15).
Question mark	Help for the screen you are on. Tap it and a panel slides up explaining that screen and what to do on it (section 2.5).
Cloud	Sync status at a glance. Tap to sync now; if the last sync failed, it opens the Sync Status screen instead (section 13).
Gear	Settings (section 14).



Figure 2. The top bar: alerts, help, sync and settings.

2.5 Help is built into every screen

You do not need this manual on the phone. Tap the question mark in the top bar and DairyBook explains the screen you are looking at right now. The panel gives a one-line description of the screen, then a short numbered “What to do” list.

On the dashboard, for example, the help panel reads: “Your farm at a glance: key stats, charts, and alerts that need your attention,” followed by three steps: review the summary cards and charts, switch tabs at the bottom to manage Animals, Finance or Records, and tap the gear icon or your avatar to open Settings.

> **For trainers.** Teach the question mark early. A farmer who knows about it can answer most of their own questions without calling you.

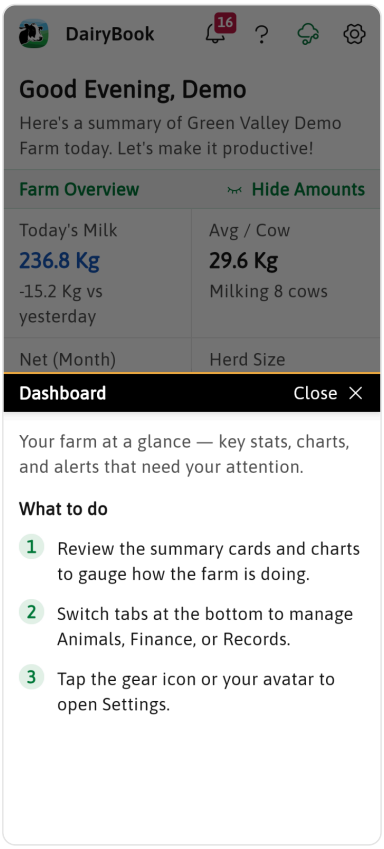


Figure 3. The in-app help panel for the dashboard.

3. My Farm: the dashboard

My Farm is the first screen you see. It greets you by name, names your farm, and then stacks a series of sections down the page. Scroll to move through them.

3.1 Farm Overview

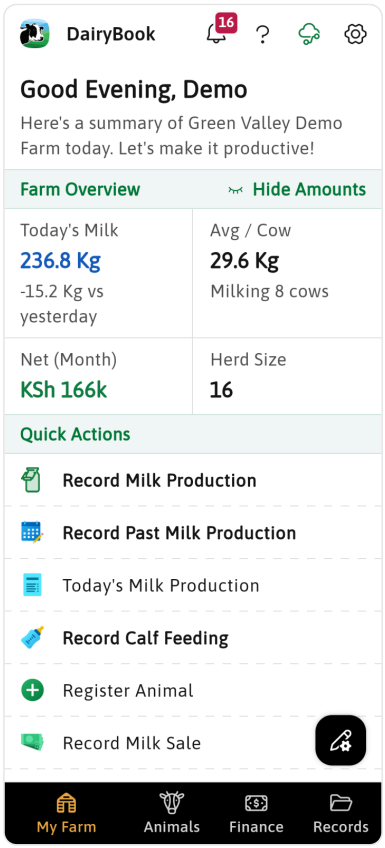


Figure 4. The My Farm dashboard, top of the screen.

Four figures summarise the day and the month.

Figure	Meaning
Today's Milk	Total kilograms recorded so far today, with the change against yesterday underneath.
Avg / Cow	Average yield per milking cow today, with the number of cows milked underneath.
Net (Month)	Income minus expenses for the current month.
Herd Size	How many animals are currently registered.

Tap Hide Amounts in the corner of the section to blank the money figures. This is useful when you are showing the phone to someone at the collection centre.

3.2 Quick Actions

The jobs done most often, one tap away:

- Record Milk Production
- Record Past Milk Production
- Today's Milk Production
- Record Calf Feeding
- Register Animal
- Record Milk Sale
- Record Expense
- Record Income

Below them sit Action Required and Calf Watch (sections 3.3 and 3.4).

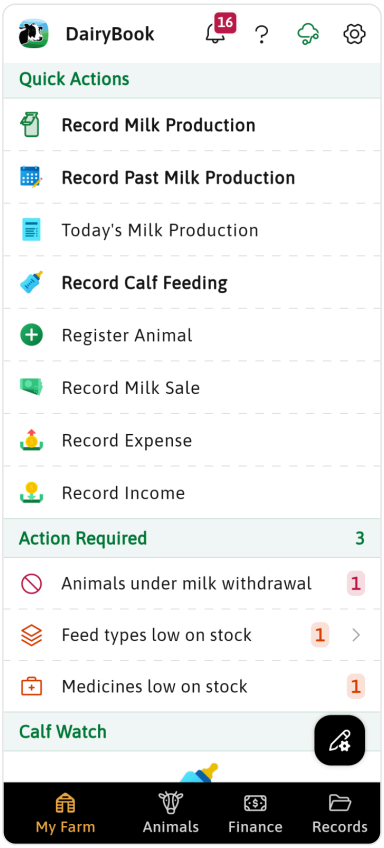


Figure 5. The Quick Actions list on the dashboard.

3.3 Action Required

Things the farm needs you to deal with, each with a count beside it. In the sample farm these are: animals under milk withdrawal, feed types low on stock, and medicines low on stock. Tap a row to see the animals or items behind it.

> **Why milk withdrawal matters.** When an animal has been treated with a medicine that has a withdrawal period, its milk must be kept out of the bulk tank until the period ends. DairyBook tracks this for you and lists the animals here.

3.4 Calf Watch

Lists calves currently on milk, so nobody is missed at feeding time. When there are none it simply says “No calves on milk”.

3.5 Milk Production

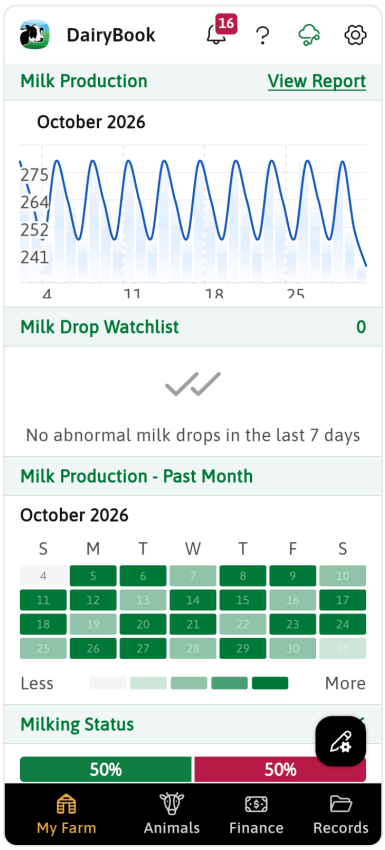


Figure 6. The milk production chart and the past-month heatmap.

A line chart of daily production across the past month, with a View Report link to the full production report. Below it are two more views of the same data:

- **Milk Drop Watchlist**: animals whose yield has fallen abnormally in the last seven days. An empty watchlist reads “No abnormal milk drops in the last 7 days”.
- **Milk Production - Past Month**: a calendar heatmap. Each day is a square, shaded from light to dark for less to more milk. Gaps in the shading show days that were never recorded.

3.6 Milking Status and Financial Overview

Milking Status splits the herd into milking and not milking, as a percentage bar and a count. Financial Overview - This Month shows income and expenses for the current month; the Finance tab (section 9) has the detail.

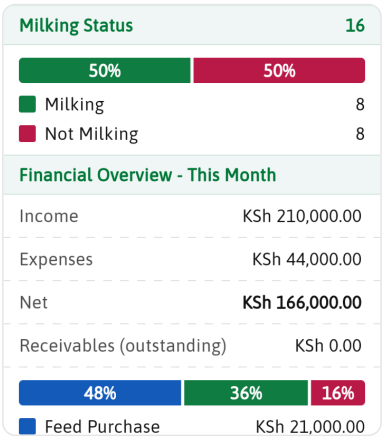


Figure 7. Milking Status and Financial Overview, at the bottom of the dashboard.

3.7 Customising the dashboard

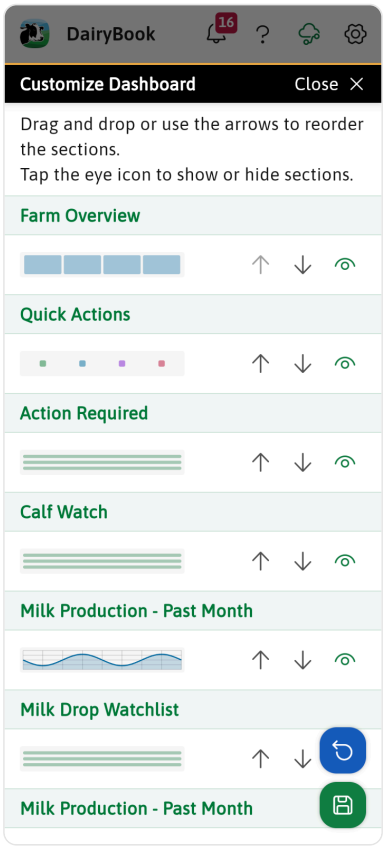


Figure 8. Customize Dashboard, with the reorder arrows and eye icons.

The dashboard is yours to arrange. A round button sits in the bottom-right corner of My Farm labelled Customize Dashboard.

1. Tap the round Customize Dashboard button on My Farm.
2. A panel opens listing every dashboard section with a small preview of each.
3. Use the up and down arrows beside a section to move it, or drag it into place.
4. Tap the eye icon beside a section to hide it, or to show it again.
5. Tap Reset to Default if you want the original order back.
6. Tap Close when you are done.

> **Worth doing on day one.** A smallholder milking twice a day usually moves Quick Actions and Action Required to the top and hides the charts. A manager usually does the opposite.

4. Animals

4.1 The herd list

Tap Animals in the bottom bar. Along the top are filter chips with counts (All, Cows, Heifers, Bulls), and under them a search box.

Each row in the list shows the animal's name, its breed, its ear tag on the right, a lactation-stage badge where one applies (for example Dry or Mid), and the animal type (Cow, Bull, Heifer, Female Calf).

- **To find one animal**: type a name or a tag number into Search animals.
- **To narrow the list**: tap a filter chip such as Cows or Heifers.
- **To change the order**: tap the sort button (two arrows) beside the Add Animal button.
- **To open an animal**: tap its row.

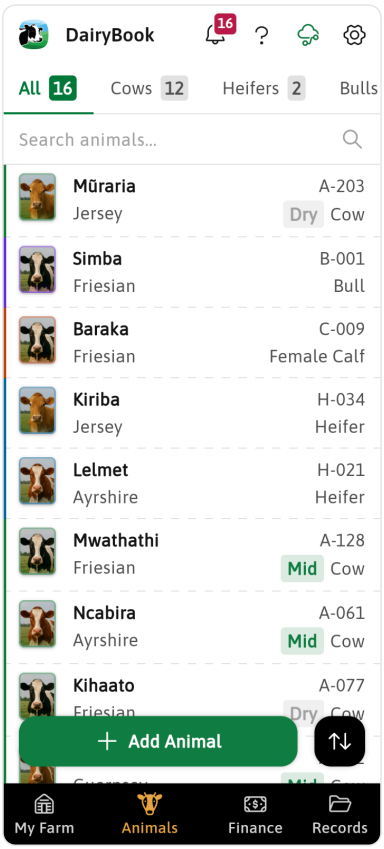


Figure 9. The animal list with filter chips and search.

4.2 Registering an animal

Tap Add Animal at the bottom of the herd list, or Register Animal from the dashboard Quick Actions. The form is divided into four tabs across the top: Basic Info, Purchase, Birth and Location. Fields marked with a red star are required.

Basic Info

Field	What to enter
Animal Type	Cow, bull, heifer, calf and so on.
Name	What you call the animal.
Photo	Tap Choose image to attach a picture. Worth doing, as it makes the herd list far quicker to scan.
Breed	For example Friesian, Jersey, Ayrshire, Guernsey.
Date of Birth	Tap the calendar icon to pick a date.
Sex	Male or female.
Age Category	The animal's life stage.
Health Status	For example Healthy.
Disposition Status	The animal's current standing on the farm.
Special Care Status	Flag an animal that needs particular attention.
Registration Type	How the animal came to be registered.
Main Note	Anything else worth recording.
Ear Tag	The tag number, for example A-203.

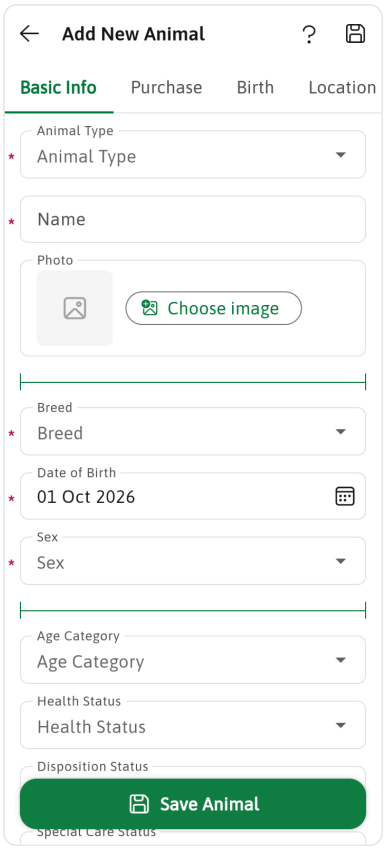


Figure 10. The Add New Animal form, Basic Info tab.

The Purchase, Birth and Location tabs hold the animal's purchase details, birth and parentage, and where it is kept. Fill in what you know; you can always come back and edit later.

1. Tap Add Animal.
2. Fill in the Basic Info tab, starting with Animal Type and Name.
3. Tap through Purchase, Birth and Location and add what applies.
4. Tap Save Animal at the bottom (or the save icon in the top bar).

> **Ear tags.** Give every animal a tag number and use the same numbering everywhere: on the animal, in the app and in your paper records. It is what ties a milk record, a treatment and a payment to the same cow.

4.3 The animal profile

Tapping an animal opens its profile. The header carries the photo, the name, badges for type and lactation stage, the breed, and a plain-language status line, for example "In heat now; breed within the day."

Below the header sit four figures:

Code	Meaning
DIM	Days in milk: how long since the animal last calved.
RPRO	The animal's current reproduction standing.
ECD	Expected calving date.
LACT	Which lactation the animal is in.

A value of N/A means there is nothing recorded yet.

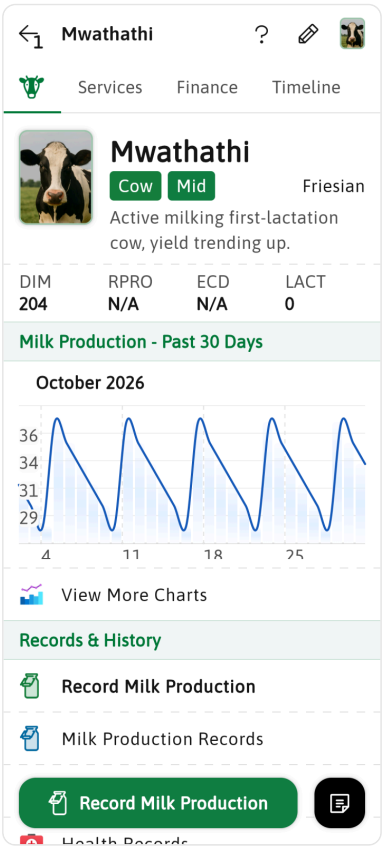


Figure 11. An animal profile, showing the header and the DIM / RPRO / ECD / LACT row.

Records & History

The first block of the profile is a list of shortcuts:

- Record Milk Production
- Milk Production Records
- Edit Animal Details
- Health Records
- Breeding Records
- Timeline
- Notes & Reminders

Basic Information and below

Scroll on and the profile lists everything recorded about the animal, grouped into Basic Information (ear tag, name, date of birth, age, breed, sex, animal type, health status, production status), Birth & Parentage, Physical Attributes (has horn, insured) and System Information (date registered, registered by, date updated, updated by).

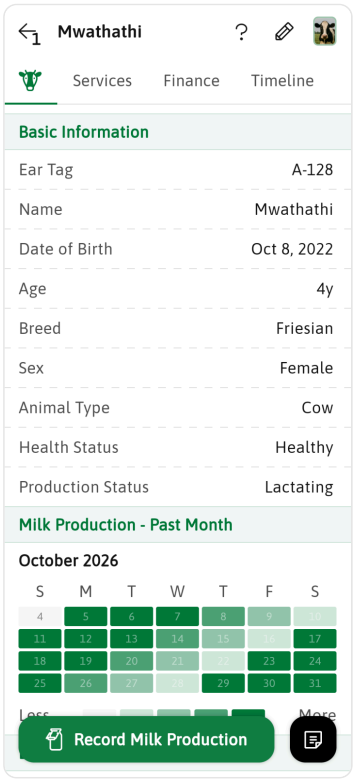


Figure 12. Basic Information on an animal profile.

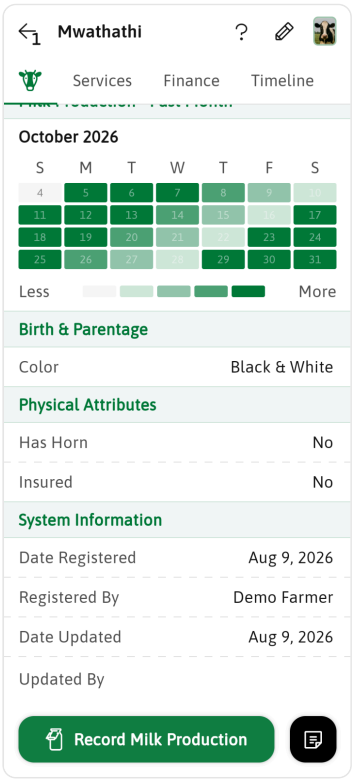


Figure 13. Birth & Parentage, Physical Attributes and System Information.

> **Who changed what.** System Information records who registered the animal and who last updated it. On a farm with several people recording, this is how you settle a question about a record.

4.4 The Services tab: every action for one animal

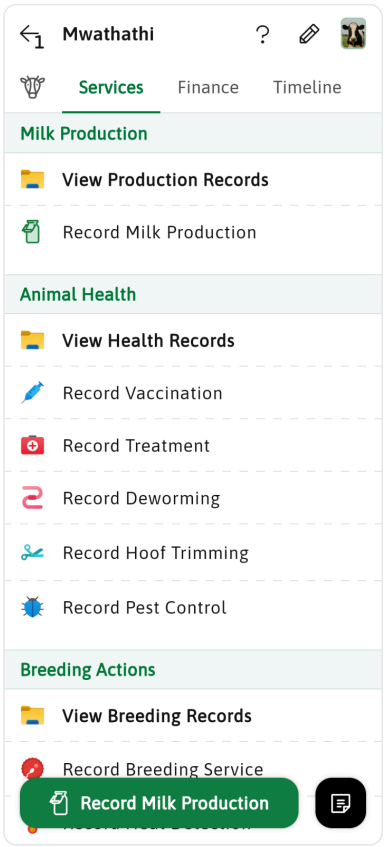


Figure 14. The Services tab on an animal profile.

Across the top of the profile are four tabs. The second, Services, is the working menu for that animal, grouped by area.

Group	Actions
Milk Production	View Production Records; Record Milk Production
Animal Health	View Health Records; Record Vaccination; Record Treatment; Record Deworming; Record Hoof Trimming; Record Pest Control
Breeding Actions	View Breeding Records; Record Breeding Service; Record Heat Detection; Record Pregnancy Check; Record Calving; Record Pregnancy Loss
Lifecycle	Weight tracking; Sell animal; Record death / cull; Mark dry-off
Archive	Archive Animal

> **Archive rather than delete.** Archiving takes an animal out of the working herd list while keeping its history intact for reports and audits.

4.5 The Finance tab

The third tab shows the money attached to that one animal. Switch between Month, Year and All-Time at the top, and filter by All, Income or Costs. The summary gives net, income and costs for the period. Sales, purchase price, vet, breeding and other costs tied to the animal appear here. The plus button adds a record directly against the animal.

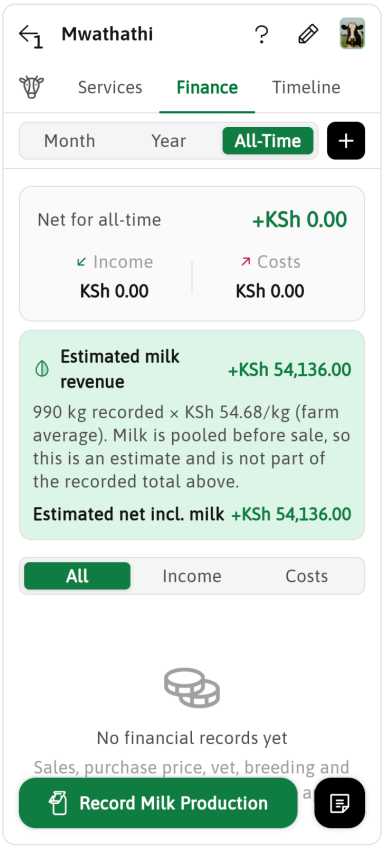


Figure 15. The Finance tab on an animal profile.

4.6 The Timeline tab

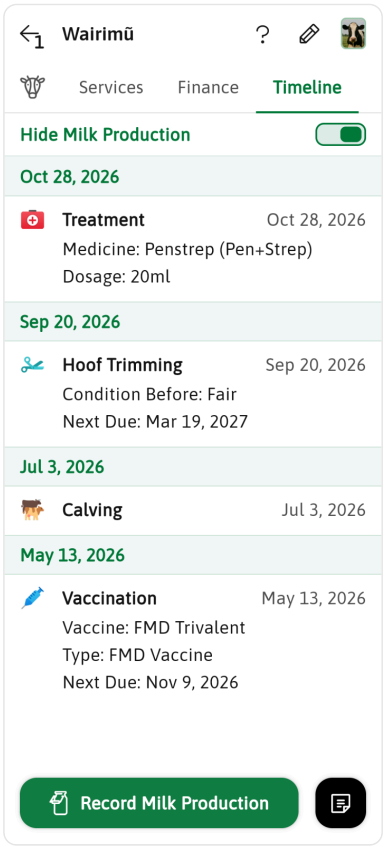


Figure 16. The Timeline tab, with Hide Milk Production switched on.

The fourth tab is the animal's life story in date order: calvings, treatments, services and the rest. A toggle at the top, Hide Milk Production, lets you take the daily milk entries out of the view so the significant events stand alone.

4.7 Working on many animals at once

For jobs that apply to a group, such as a whole-herd deworming or a batch of vaccinations, use batch activities instead of opening each animal in turn. Go to the Records tab and, under Animals, choose Start Batch Activity. View Batch Activities shows what has been run.

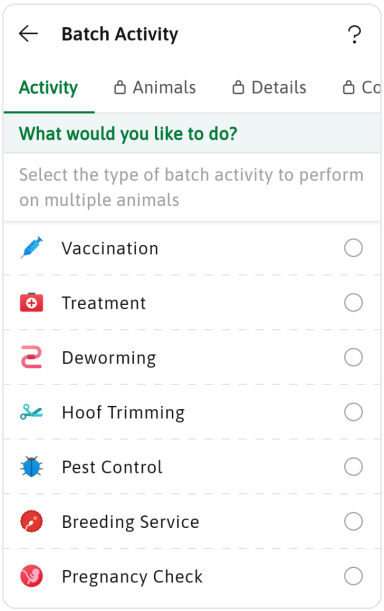


Figure 17. Start Batch Activity: choosing what to do to the group.

5. Milk and production

Recording milk is the job done most often, so it has been made short. There are three steps and the app remembers where you are: Weight, then Bucket, then Confirm.

5.1 Recording a milking

1. Start the record. From the dashboard tap Record Milk Production, or open the animal and tap the green Record Milk Production button at the bottom of its profile.
2. Check the animal. Its photo, name and breed appear at the top. The circular arrows beside the animal let you switch to a different one.
3. Enter the weight. Type the kilograms on the number pad. Use the dot key for a decimal and the back arrow to correct a digit.
4. Tap Record Weight.
5. Choose the bucket. Pick No bucket to record the weight exactly as entered, or select a bucket you have set up so its weight is taken off automatically.
6. Tap the confirm button. It names the figure, for example Confirm 8 Kg.
7. Check the summary. The Confirm step lists the animal, tag and breed, then milk weight, date and time.
8. Tap Save Record.

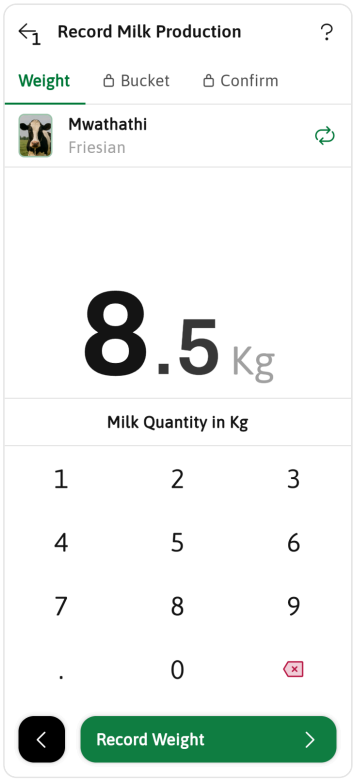


Figure 18. Step 1 of recording milk: the weight keypad.

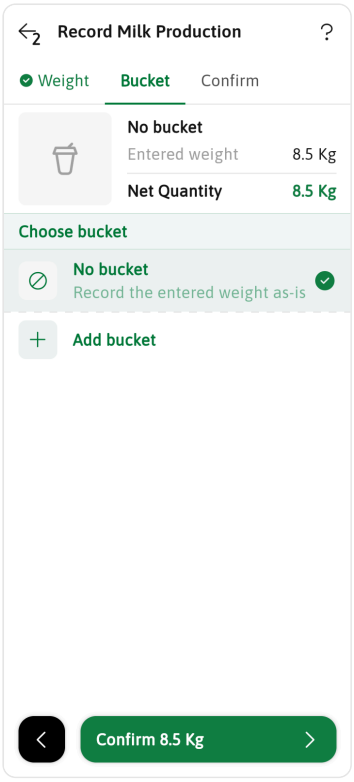


Figure 19. Step 2: choosing a bucket.

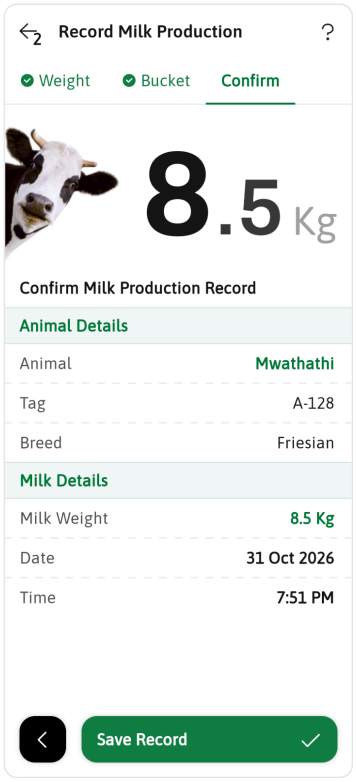


Figure 20. Step 3: the confirmation summary before saving.

5.2 Buckets and tare weights

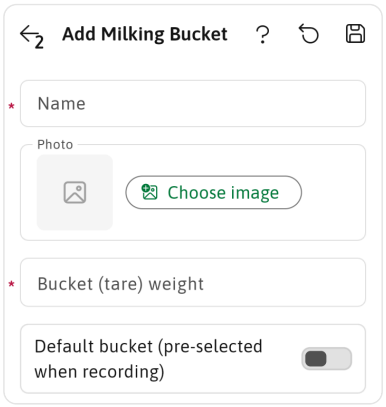


Figure 21. Adding a milking bucket and its tare weight.

If you weigh milk in the bucket, DairyBook can subtract the bucket for you. On the Bucket step, tap Add bucket to set one up once; from then on it appears in the list and the app shows both the entered weight and the net quantity before you save.

Buckets are managed under the Records tab, in Operations & Assets, as Milking Buckets. Weighing Scales sit alongside them.

> **Bluetooth scales.** DairyBook can take weights directly from a Bluetooth scale, which removes typing mistakes. Register the scale under Records › Weighing Scales.

5.3 Recording a milking you missed

Record Past Milk Production, on the dashboard and under Records › Milk, is the same flow with a date you choose. Use it to catch up on a day when the phone was flat, or to enter a paper record.

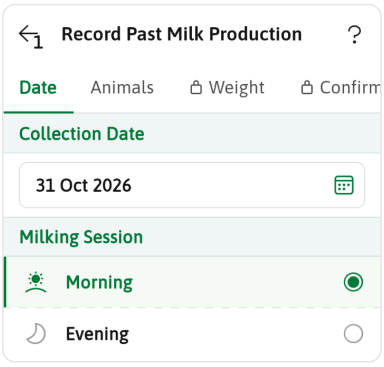


Figure 22. Record Past Milk Production: pick the date and session first.

5.4 Checking today

Today's Milk Production lists everything recorded today, so you can see at a glance which cows are still to be milked. It is on the dashboard Quick Actions and under Records › Reports.

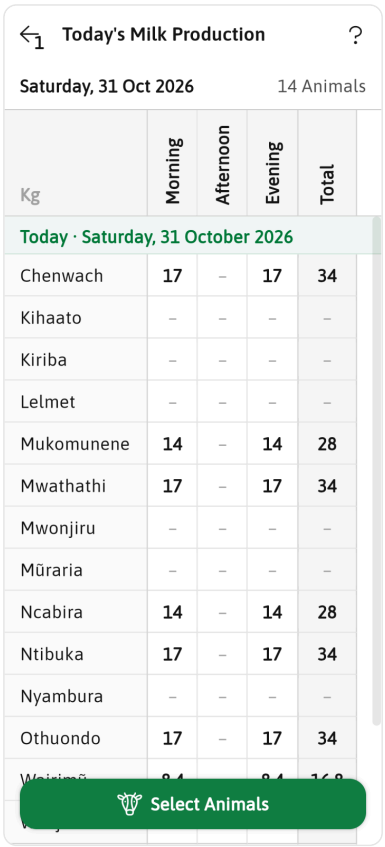


Figure 23. Today's Milk Production, by animal and session.

5.5 Spotting problems early

Two tools watch production for you. The Milk Drop Watchlist on the dashboard flags any animal whose yield falls abnormally over seven days, often the first sign of mastitis, heat or a feed problem. The past-month heatmap shows patterns across the whole herd, including days where nothing was recorded at all.

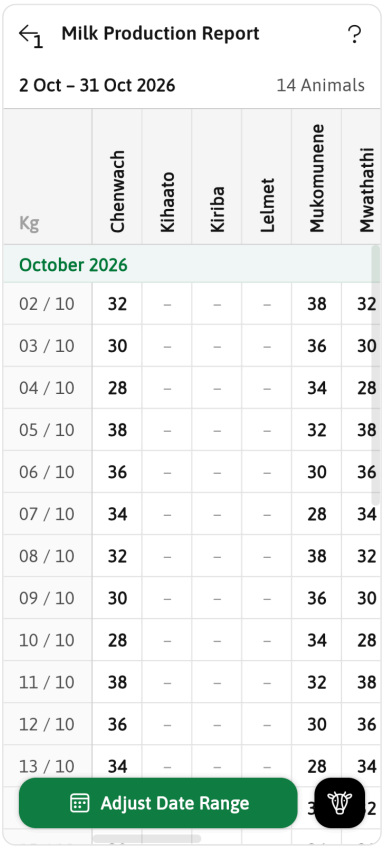


Figure 24. The Milk Production Report, day by day for each animal.

5.6 Calf feeding

Milk fed to calves is recorded separately so it does not disappear from your figures. Record Calf Feeding is on the dashboard Quick Actions and under Records › Calf Feeding, together with Record Past Calf Feeding. Calves currently on milk appear in Calf Watch on the dashboard, and Today's Calf Feeding and the Calf Feeding Report are under Records › Reports.

6. Breeding and reproduction

Breeding records live on the animal. Open the animal, tap Services, and use the Breeding Actions group.

Action	When to use it
Record Heat Detection	When you see an animal in heat. This starts the clock the app uses to tell you when to breed.
Record Breeding Service	When the animal is served, whether by AI or natural service.
Record Pregnancy Check	After the vet or technician checks. The result drives the expected calving date shown on the profile.
Record Calving	When the calf arrives.
Record Pregnancy Loss	If the pregnancy does not hold.
View Breeding Records	The full breeding history for that animal.

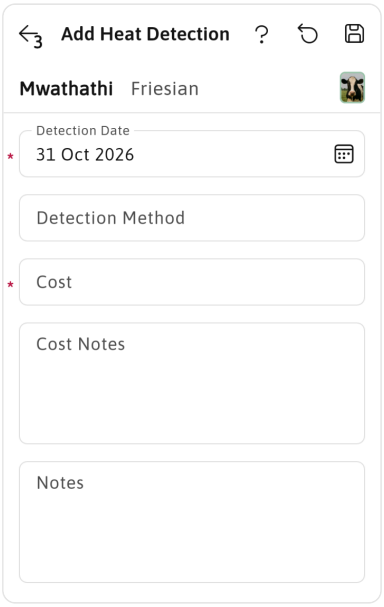


Figure 25. Recording a heat detection.

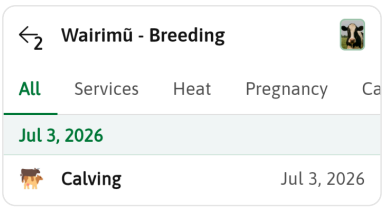


Figure 26. An animal's breeding records.

6.1 What the app tells you

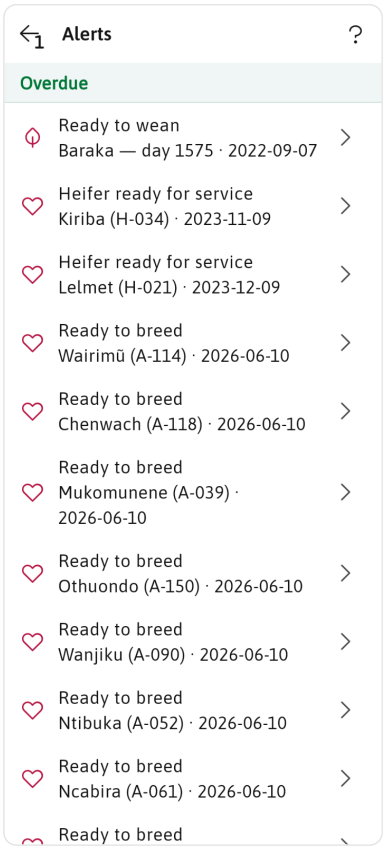


Figure 27. The alerts list, showing overdue breeding items.

Once heat and service records exist, DairyBook does the watching. The animal profile carries a plain-language line such as “In heat now; breed within the day,” and the alerts list (section 15) collects them all (“Ready to breed”, “Heifer ready for service”, “Ready to wean”), each with the animal, its tag and the date it became due, split into Overdue and Upcoming.

6.2 The breeding directories

Under the Records tab, the Breeding group holds the reference lists that sit behind these records:

- **AI Technician Directory**: the technicians you call, so a service record can name one.
- **Bull Directory**: bulls used for service, for genetic tracking through the generations.
- **Semen Inventory**: straws in stock, so you know what is in the flask before you order.

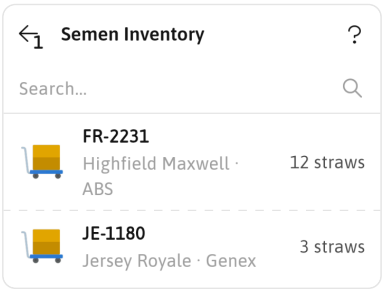


Figure 28. Semen Inventory, with the straws in stock.

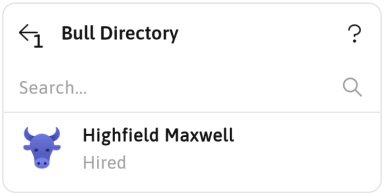


Figure 29. The Bull Directory.

6.3 Drying off

When a cow is to be dried off ahead of calving, open the animal, tap Services, and choose Mark dry-off under Lifecycle. The animal's badge changes to Dry and it drops out of the milking count on the dashboard.

7. Animal health

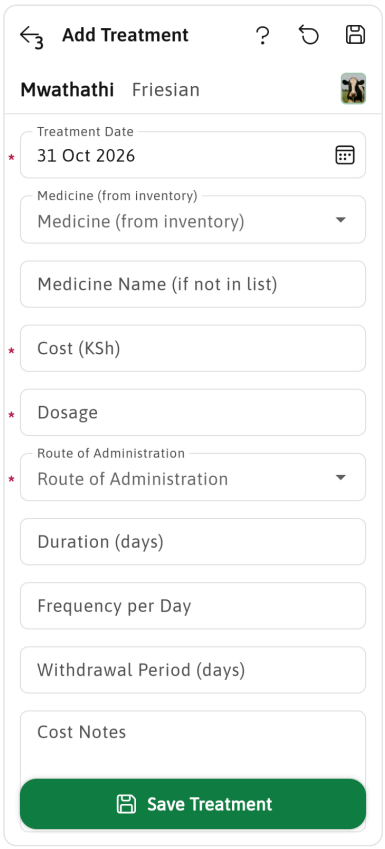


Figure 30. Recording a treatment, including its withdrawal period.

Health records are kept per animal, on the profile's Services tab under Animal Health.

Action	What it records
Record Vaccination	A vaccination given, for the schedule and for compliance.
Record Treatment	A treatment and the medicine used. This is what drives withdrawal tracking.
Record Deworming	A deworming.
Record Hoof Trimming	Hoof care.
Record Pest Control	Tick, fly and other pest treatments.
View Health Records	The animal's full health history.

7.1 Withdrawal periods

When you record a treatment with a medicine that has a withdrawal period, DairyBook keeps the animal out of your saleable milk until the period ends and lists it on the dashboard under Action Required as “Animals under milk withdrawal”. Check that line before every collection.

> **This is the safety net.** Milk from a treated animal reaching the bulk tank can cost a whole load. Record the treatment at the moment you give it, not at the end of the day.

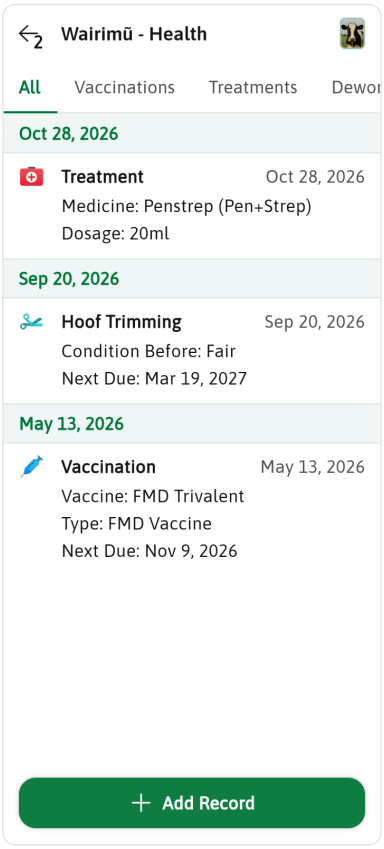


Figure 31. An animal’s health records.

7.2 Medicines and vets

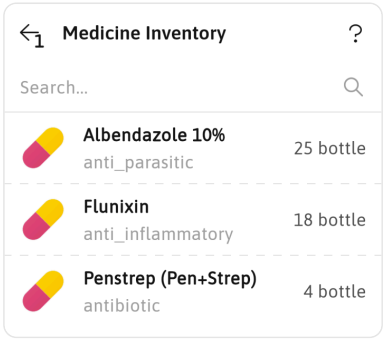


Figure 32. Medicine Inventory, with stock levels.

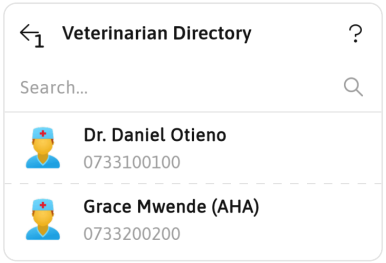


Figure 33. The Veterinarian Directory.

Under Records › Health:

- **Medicine Inventory**: what you hold, with stock levels. When a medicine runs low it appears on the dashboard under Action Required as “Medicines low on stock”.
- **Veterinarian Directory**: the vets you use, so a treatment record can name one.

7.3 Health status on the profile

Each animal carries a Health Status field, shown in Basic Information and set when you register the animal or through Edit Animal Details. Keep it current: it is the quickest read on the herd when someone else picks up the phone.

8. Feed and nutrition

Feed is managed from the Records tab, under Feed.

Screen	What it is for
Feed Inventory	What feed you hold and how much is left. Low stock appears on the dashboard under Action Required as “Feed types low on stock”.
Feed Preparation Recipes	Rations you mix yourself, so the same recipe is used every time.
Feed Types	The feeds you use, as a reference list.
Feed Suppliers	Who you buy from.

Feed purchases show up in Finance as expenses (in the sample farm, entries such as “Feed Purchase” and “Dairy Meal (18%), 250 units” appear in the transaction list), so the cost of feeding shows up against the income from milk.

> **The number that matters.** Feed is usually the largest cost on a dairy farm. Recording purchases as they happen is what makes the margin figure in Finance › Reports meaningful.

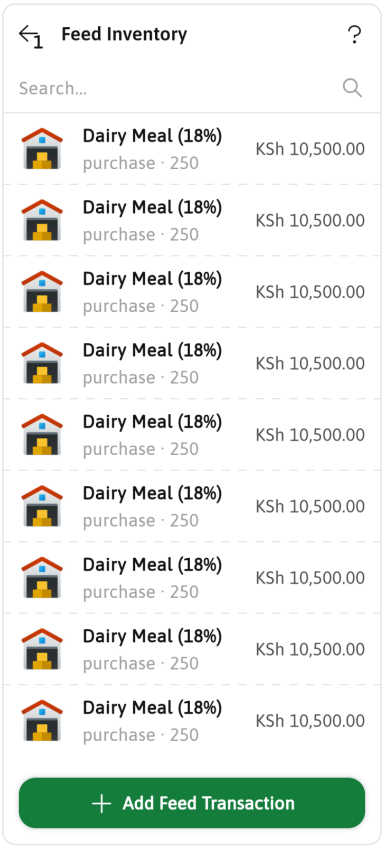


Figure 34. Feed Inventory: feed bought and used.

9. Finance

Tap Finance in the bottom bar. Four tabs run across the top: Overview, Transactions, Budgets and Reports.

9.1 Overview

At a Glance gives four totals (Today, This Week, This Month and This Year), each with the number of transactions behind it. Hide Amounts blanks the figures when you are not alone.

Cash Flow Status states the position in words, for example “Positive cash flow: income exceeds expenses by 51.3%”, with the net figure beneath. This Month splits income and expenses. Quick Actions at the bottom offer Add Income and Add Expense.

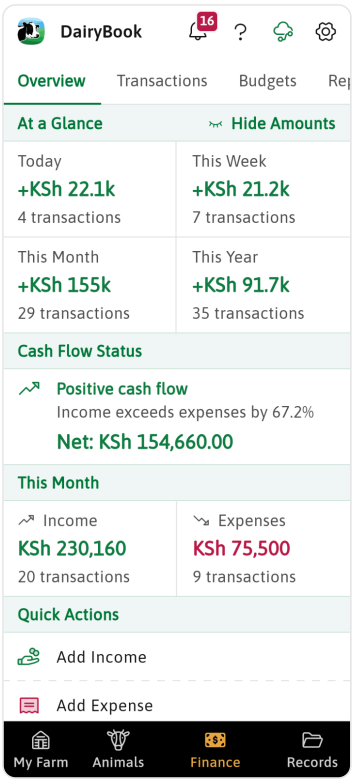


Figure 35. The Finance Overview tab.

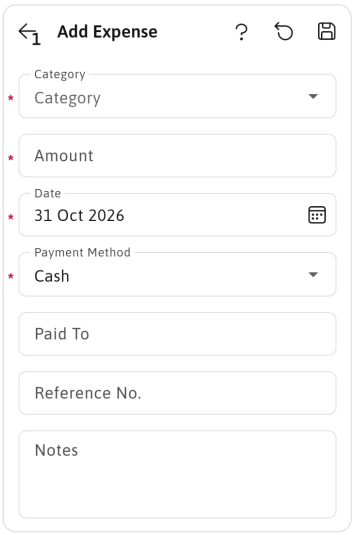


Figure 36. Recording an expense.

9.2 Transactions

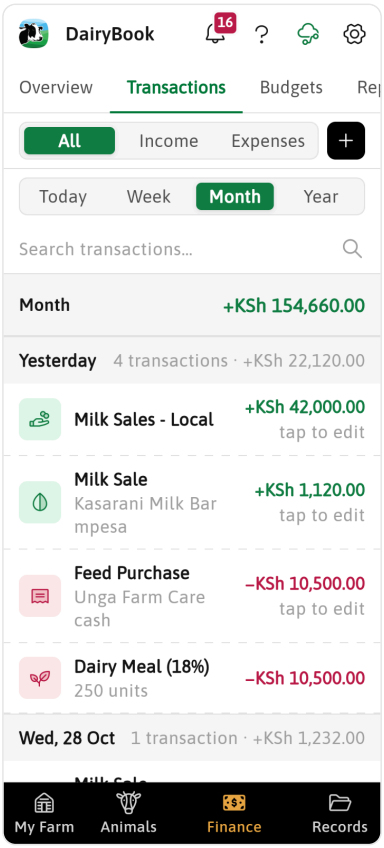


Figure 37. The Transactions tab with filters and a day's entries.

Every movement of money, newest first and grouped by day, with the day's count and net at the top of each group.

- Filter by All, Income or Expenses.
- Choose the period: Today, Week, Month or Year.
- Search transactions by text.
- Tap the plus button to add one.
- Tap any entry to edit it; each row shows "tap to edit".

A row carries the category, the other party, the payment method and the amount, for example "Milk Sale · Kasarani Milk Bar · mpesa · +KSh 1,120.00", or "Feed Purchase · Unga Farm Care · cash · –KSh 10,500.00". Income is green, expenses are red.

9.3 Budgets

Budgets are set a month at a time. Use the arrows beside the month name to move between months. Month Summary shows what has been spent, what was budgeted and what remains. Under By Category, a category with no budget reads “No budget set, tap to add”; tap it to set one. The plus button adds a budget.

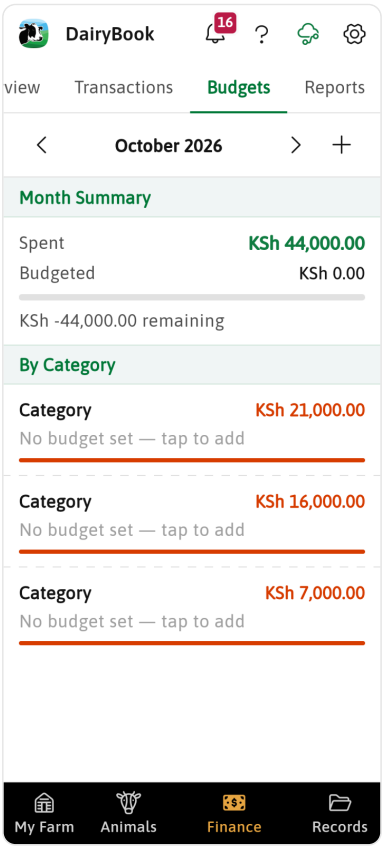


Figure 38. The Budgets tab.

9.4 Reports

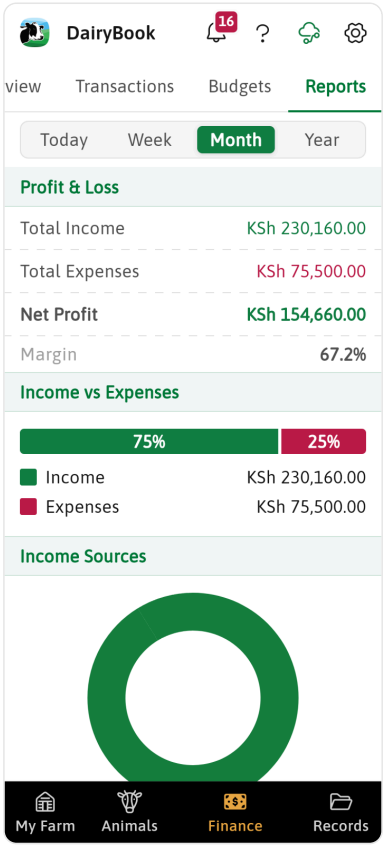


Figure 39. The Reports tab, showing Profit & Loss.

Choose a period (Today, Week, Month or Year) and the report rebuilds. Profit & Loss gives total income, total expenses, net profit and margin. Income vs Expenses shows the split as a bar. Income Sources breaks income down by where it came from.

9.5 Payments and M-Pesa

DairyBook tracks income, expenses and customer balances, and payments can be collected by M-Pesa. Where a cooperative applies deductions, they are applied and reconciled automatically against the member's account.

> **Reconciling.** Record the sale in DairyBook at the moment of sale and let the payment method field carry how it was paid. The transaction list then matches your M-Pesa statement line for line.

10. Records: the reference library

The Records tab is where everything that is not a daily entry lives: the inventories, directories and price lists that the rest of the app draws on. There is a search box at the top (Search actions) and a search button in the corner; on a screen this long, searching is usually faster than scrolling.

> **Set these up first.** A new farm should fill in Feed Types, Medicine Inventory, the vet and AI technician directories, Default Milk Price and Milking Buckets before recording daily work. Those lists are what the daily screens offer you to choose from.

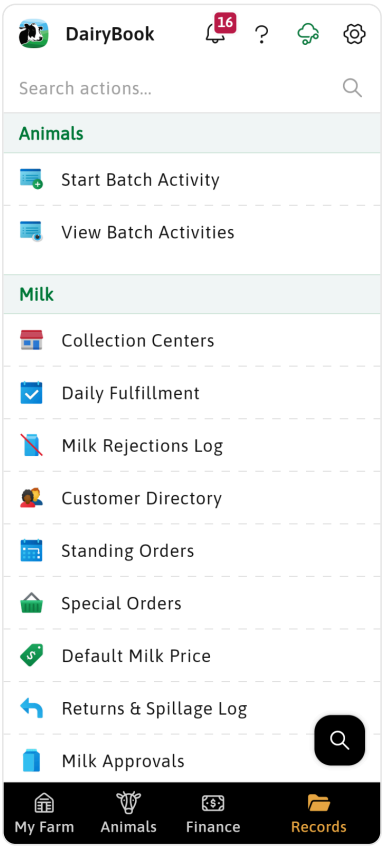


Figure 40. The Records tab, top of the list.

The full contents, in the order they appear:

Group	Screens
Animals	Start Batch Activity; View Batch Activities
Milk	Collection Centers; Daily Fulfillment; Milk Rejections Log; Customer Directory; Standing Orders; Special Orders; Default Milk Price; Returns & Spillage Log; Milk Approvals; Record Past Milk Production
Breeding	AI Technician Directory; Bull Directory; Semen Inventory
Health	Medicine Inventory; Veterinarian Directory
Feed	Feed Inventory; Feed Preparation Recipes; Feed Types; Feed Suppliers
Calf Feeding	Record Calf Feeding; Record Past Calf Feeding
Reports	Milk Production Report; Calf Feeding Report; Today's Milk Production; Today's Calf Feeding
Team & Access	Farm Staff; User Roles
Operations & Assets	Farm Tasks; Alerts & Notifications; Document Management; Equipment Registry; Equipment Maintenance; Farm Supplies; Weighing Scales; Milking Buckets

Group	Screens
Compliance & Quality	Inspections Log; Certifications; Insurance Policies; Insurance Claims; Land Parcels

11. Selling milk and serving customers

This section matters most to cooperatives, collection centres and any farm selling directly. All of it sits under Records › Milk.

11.1 Customers and orders

Screen	What it does
Customer Directory	Everyone you sell to: bars, neighbours, the cooperative.
Standing Orders	Regular repeating orders, so the daily quantity is known in advance.
Special Orders	One-off orders outside the standing pattern.
Daily Fulfillment	The day's deliveries against those orders: who has been served and who has not.
Default Milk Price	The price used unless a sale says otherwise.

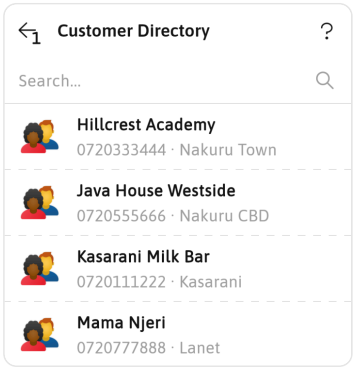


Figure 41. The Customer Directory.

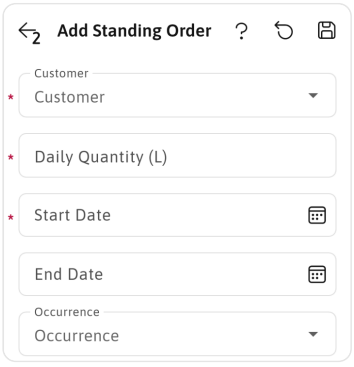


Figure 42. Adding a standing order.

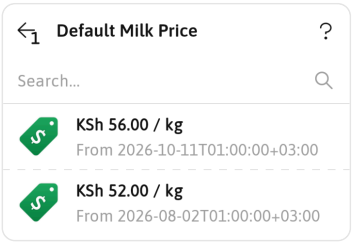


Figure 43. Default Milk Price, with earlier prices below the current one.

11.2 Recording a sale

Record Milk Sale is on the dashboard Quick Actions. The sale lands in Finance › Transactions with the customer and the payment method attached, and feeds the income figures on the dashboard and in Finance › Reports.

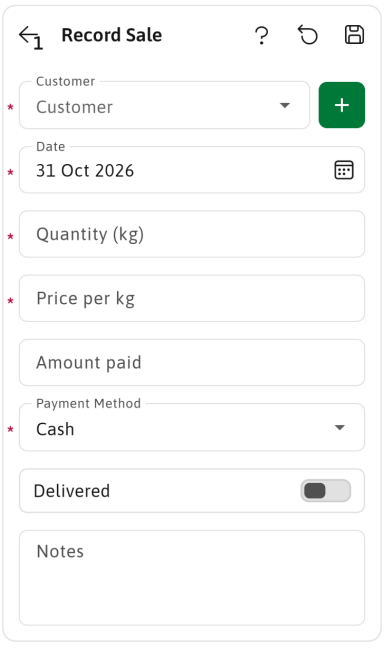


Figure 44. Recording a milk sale.

11.3 When milk does not make it

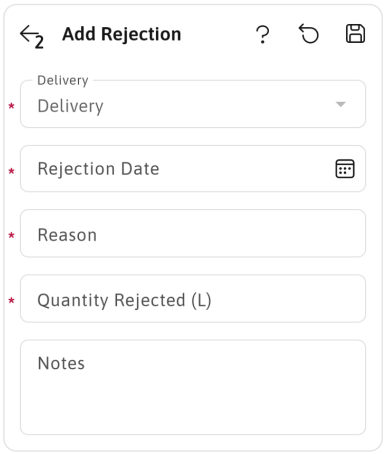


Figure 45. Logging a milk rejection.

Screen	What it does
Milk Rejections Log	Milk turned away at intake, with the reason. This is the record that protects you in a dispute.
Returns & Spillage Log	Milk returned or lost, so the gap between produced and sold is explained.
Milk Approvals	Milk cleared for sale or collection.

11.4 Collection centres

Collection Centers holds the intake points your farm or cooperative delivers to. For a cooperative running several centres, this is the list that ties intake to a place.

> **For cooperatives.** DairyBook supports several farms from a single installation with farm-level data isolation, so member farms cannot see each other's records. Member deductions are applied and reconciled automatically.

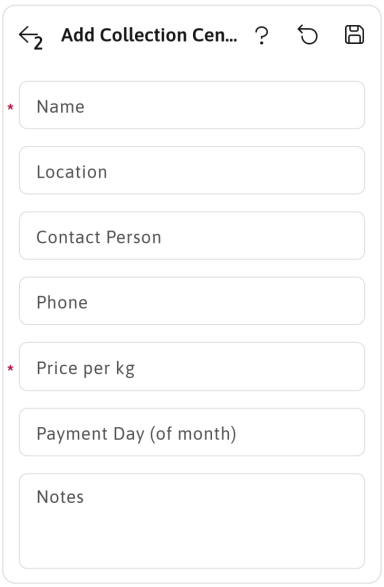


Figure 46. Adding a collection centre.

12. Team and access

More than one person can use DairyBook for the same farm, each with their own login and their own level of access. Open Settings › Team & Roles, or Records › Team & Access.

12.1 The team list

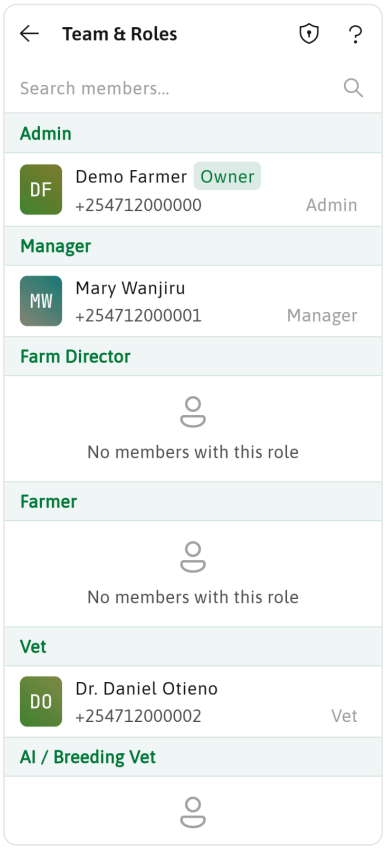


Figure 47. Team & Roles, with members grouped by role.

Team & Roles lists everyone grouped by role, each with their name and phone number. The farm owner carries an Owner badge. A role with nobody in it shows “No members with this role”. Use the search box at the top to find a member on a large team.

12.2 What each role can do

Tap the shield icon in the top bar of Team & Roles to open the Roles screen. It explains, in the app’s own words, exactly what each role can reach. Every role is drawn as a strip of the farm’s areas, colour-coded against a four-level key (No access, View only, Add & edit, Full control), with a count underneath. Tap a role to see precisely which screens it opens.

Role	What the app says it can do
Admin	“Full access, including team management and deleting records.” Marked Not invitable: the owner holds it.
Manager	“Add and edit everything; manage the farm. No deletes or team management.”
Farm Director	“Add and edit everything; manage the farm. No deletes or team management.”
Farmer	“Add and edit animals, milk and health. View finance and reports.”
Vet	“Full access to health records; read-only elsewhere.”
AI / Breeding Vet	“Full health & breeding access: manage breeding events, animals and the breeding catalog. Read-only on finance.”
Farm Hand	“Record milk collection only, for the animals currently being milked. Can edit own recent entries briefly. No animal browsing, health, finance, or reports.”
Read only	“View only: cannot make changes.”

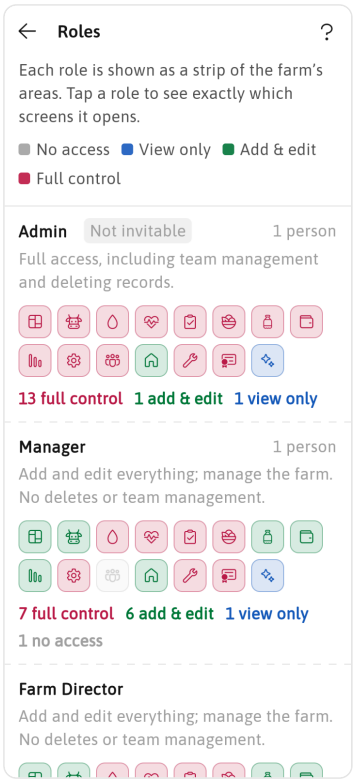


Figure 48. The Roles screen, with the access key and the per-role strips.

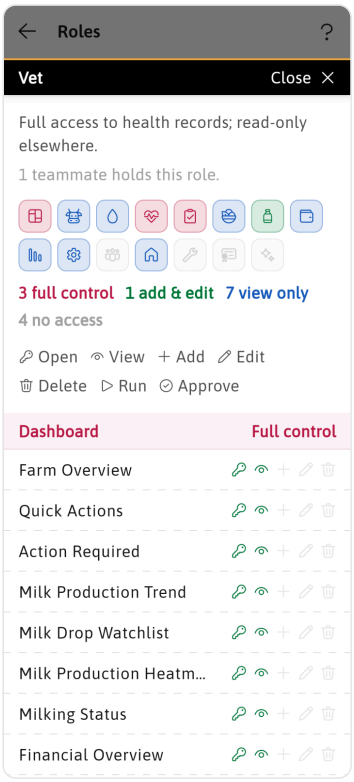


Figure 49. One role opened, showing exactly which screens it can use.

12.3 Choosing the right role

Settings describes Team & Roles as "Invite teammates and manage what they can do". The wider staff records and role definitions live under Records › Team & Access, as Farm Staff and User Roles.

- **Farm Hand** is deliberately narrow: milk recording only, for animals currently being milked, with a short window to correct their own entries. It is the right role for casual parlour help.
- **Farmer** suits anyone doing the daily animal work, including health and breeding, who should see the money but not change it.
- **Vet** and **AI / Breeding Vet** give an outside professional exactly the records they need and nothing else.
- **Read only** is for an accountant, a lender or an inspector.
- **Manager** and **Farm Director** can run the farm but cannot delete records or change the team. This is deliberate, so the audit trail holds.

> **Give the smallest access that works.** Only Admin can delete records and manage the team, and it cannot be handed out by invitation. Read only is the right answer far more often than people expect.

12.4 Several devices, one farm

Several phones can be used on the same farm at once and stay consistent. Where two devices change the same record while offline, the most recent change wins once they both sync. Section 13 explains the mechanics.

13. Working offline and syncing

This is the part of DairyBook that matters most in a parlour with no bars, and the part farmers most need to trust. The rule is simple: record as normal, and never wait for a connection.

13.1 How it works

- **Capture anywhere.** Every feature works with no connection. Record milking in the parlour and treatments in the field.
- **Saved on the phone first.** Records are written to the phone's own database before anything is sent anywhere.
- **Sync when a signal appears.** Only what changed is sent, and the queue is prioritised: milk and payments first, then health and breeding.

- **Several devices stay consistent.** Where the same record was changed in two places, the most recent change is the one kept.
- **Records can be verified.** Entries can be cryptographically signed per device, giving a tamper-evident trail for compliance.

13.2 Reading the sync icon

The cloud icon in the top bar is the everyday indicator. Tap it to sync now; if the last sync failed, it opens the Sync Status screen instead. To open Sync Status at any time, go to Settings › Data Synchronization.

13.3 The Sync Status screen

At the top: the current state and when it last succeeded (for example “Synced, 7m ago”), with a refresh control beside it. Then:

Section	What it tells you
Synchronize Now	Sends and receives immediately. Use it before walking out of signal, and after coming back into it.
All synced / View All	Whether anything is still waiting, and what.
Sync Status	Status (for example Idle), Direction, Last Full Sync and Last Delta Sync.
Sync History	Previous sync runs.
Buckets	Each area of data (Admin, Animals, Financial, Health, Milk, Setup) at both Farm and Global level, each with a version number and a state such as “In sync”.
Force Full Sync	Re-syncs all data from the server. A last resort, not a daily habit.

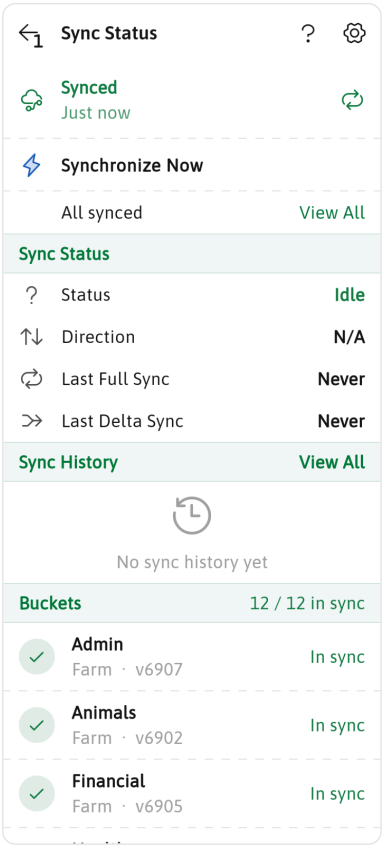


Figure 50. The Sync Status screen.

13.4 What to do when something looks wrong

1. Open Sync Status (Settings › Data Synchronization) and read the top line. If it says Synced with a recent time, your data is safe.
2. If items are waiting, check the phone actually has a connection, then tap Synchronize Now.
3. Look at the Buckets list. A bucket that is not “In sync” tells you which area is stuck.
4. If a record still has not appeared on another phone after a successful sync on both, use Force Full Sync on the phone that is missing it.
5. If it still does not resolve, note the animal or record and the time, and contact support at hello@dairybook.app.

> **Do not reinstall.** Uninstalling the app to “fix” sync risks anything not yet uploaded. Always sync first, and ask before reinstalling.

14. Settings

Tap the gear icon in the top bar. Settings is grouped into sections.

Section	What it holds
Network & Synchronization	Network Connection; Data Synchronization (section 13).
Account	My Profile: your own details.

Section	What it holds
Team	Team & Roles: invite teammates and manage what they can do (section 12).
Dashboard	Show values at dashboard: a switch that hides or shows the money figures on My Farm.
Appearance	Theme (System, Light or Dark); Text size (S, M, L, XL); and switches for Bold text, High contrast, Larger touch targets, Dyslexia-friendly font, Increased line spacing and Reduce motion.
Application	Notifications: configure notification preferences. Language: English, with more languages coming.
About	About DairyBook with the version number; Privacy Policy; Terms of Service.
Authentication	Log Out.

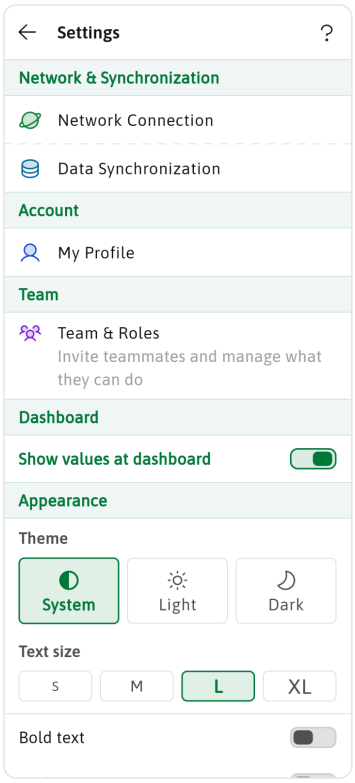


Figure 51. The Settings screen.

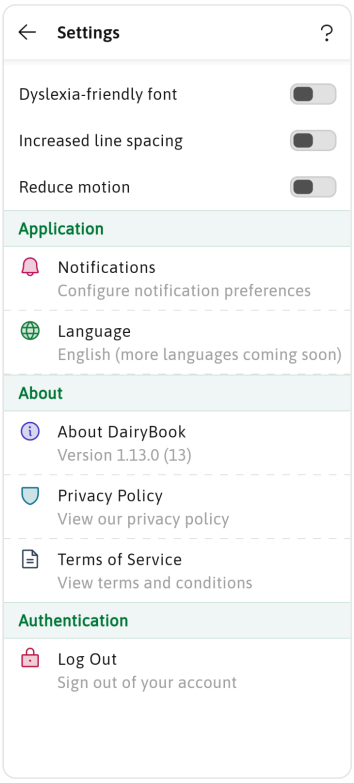


Figure 52. The rest of Settings: Application, About and Log Out.

14.1 Making the app easier to use

The Appearance settings are worth showing every new user, particularly anyone working in bright sun or with poor eyesight. Larger touch targets and text size L or XL make a real difference to someone entering weights with wet hands in a parlour.

> **Accessibility.** High contrast, bold text, a dyslexia-friendly font, increased line spacing and reduce motion are all one switch each. There is no reason for anyone to struggle with the default.

15. Alerts and notifications

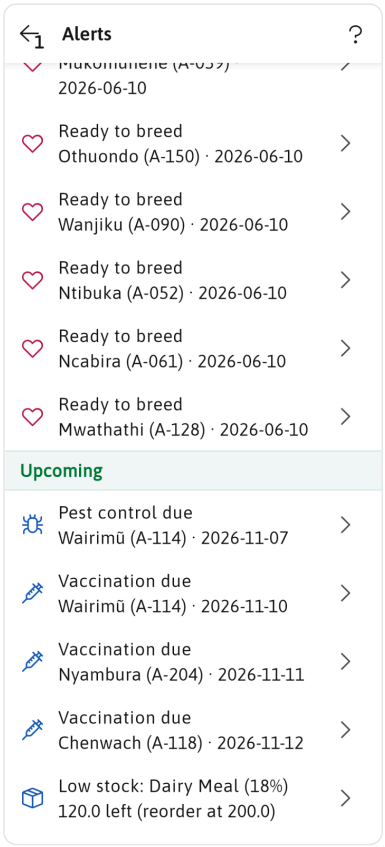


Figure 53. Upcoming alerts: vaccinations, pest control and low stock.

The bell in the top bar carries a count of items needing attention. Tap it to open the Alerts screen, where items are grouped into Overdue and Upcoming.

Each alert names what is needed, the animal and its tag, and the date it became due, for example “Ready to breed · Wairimũ (A-114) · 2026-07-03”, “Heifer ready for service · Kiriba (H-034)”, or “Ready to wean · Baraka, day 1493”. Tap an alert to go to the animal.

Alerts also surface on the dashboard under Action Required, which covers stock and safety items: animals under milk withdrawal, feed types low on stock and medicines low on stock.

Notification preferences are set in Settings › Application › Notifications. The wider alert configuration sits under Records › Operations & Assets › Alerts & Notifications.

> **Clear the overdue list weekly.** An alerts screen with fifty overdue items stops being read. Work through it once a week and the count stays meaningful.

16. Quick starts by role

16.1 The farmer’s daily routine

1. Open the app. Read the top of My Farm: today’s milk, the average per cow and the herd size.
2. Check Action Required. Deal with anything under milk withdrawal before milk leaves the farm.
3. Milk and record. Use Record Milk Production, one animal at a time: weight, bucket, confirm, save.
4. Feed the calves and record it with Record Calf Feeding.
5. Record anything that happened (a treatment, a heat, a service) on the animal’s Services tab, at the time it happens.
6. Record money as it moves: Record Milk Sale, Record Expense, Record Income.
7. Check the bell for anything due tomorrow.
8. When you next have a signal, tap the cloud icon to sync, and check Settings › Data Synchronization says Synced.

16.2 The manager’s week and month

1. Weekly: work through the Alerts list until Overdue is empty.
2. Weekly: read the Milk Drop Watchlist and follow up any animal on it.
3. Weekly: check the past-month heatmap for days with no recording, and find out why.
4. Weekly: review Records › Milk › Daily Fulfillment against Standing Orders.
5. Monthly: open Finance › Reports and read Profit & Loss and margin for the month.
6. Monthly: set or revise budgets in Finance › Budgets.
7. Monthly: check Feed Inventory and Medicine Inventory against what was actually used.
8. Monthly: review Team & Roles and remove anyone who has left.

16.3 The field agent’s onboarding sequence

A workable order for setting a new farm up in one visit:

1. Install the app and complete the first-time setup while you still have a connection.
2. Show the four bottom tabs and the question mark help. Make sure they can find help without you.
3. Set Appearance: text size and, if needed, larger touch targets.
4. Fill the reference lists together: Feed Types, Medicine Inventory, the vet and AI technician directories, Default Milk Price, Milking Buckets.
5. Register the herd. Photograph each animal and enter its ear tag as you go.
6. Record one milking together, end to end, and let them do the second one.
7. Record one expense and one milk sale together.
8. Customise the dashboard for how they actually work.
9. Show the sync icon and explain that records are safe on the phone before they are sent.
10. Set a follow-up date and check the heatmap then: gaps show where the habit has not stuck.

> **The habit is the hard part.** The app is not the difficulty; recording at the moment the thing happens is. Anything recorded "later" is usually recorded never.

17. Troubleshooting and common questions

17.1 Questions farmers ask

Question	Answer
Does it really work without internet?	Yes. Every feature works with no connection, and records sync automatically once you are back online.
Will I lose my records if there is no signal?	No. Records are written to the phone first. They stay there until they have been sent.
Can I manage more than one farm?	Yes. DairyBook supports several farms from one installation, with farm-level data isolation, built for cooperatives and extension workers.
How do payments work?	Track income, expenses and customer balances, and collect payments by M-Pesa. Cooperative deductions are applied and reconciled automatically.
Can I record milk with a scale?	Yes. DairyBook connects to Bluetooth scales to capture weights automatically and cut typing errors.
Is my data safe and verifiable?	Records can be cryptographically signed with per-device keys, creating a tamper-evident audit trail for compliance.

17.2 When something is not right

Problem	What to do
The dashboard shows 0 Kg today	Nothing has been recorded yet today, or it was recorded against a past date. Check Today's Milk Production.
An animal is missing from the list	Check the filter chips at the top: you may be on Cows rather than All. If it was archived, it is out of the working list by design.
A record is on one phone but not another	Open Sync Status on both and tap Synchronize Now. If it is still missing, use Force Full Sync on the phone that lacks it.
Money figures are hidden	Hide Amounts is on, or Show values at dashboard is switched off in Settings.
Milk cannot be sold from an animal	It is probably under a withdrawal period from a treatment. Check Action Required on the dashboard.
The app feels hard to read	Settings › Appearance: raise the text size, or turn on high contrast and bold text.
Someone can see what they should not	Check their role in Settings › Team & Roles and move them down: Read only for anyone who does not need to change records.

17.3 Getting help

- In the app: the question mark in the top bar explains the screen you are on.
- By email: hello@dairybook.app
- On the web: dairybook.app

Appendix A: Screenshot reference

Every figure in this guide was captured from the interactive demo at demo.dairybook.app. The table below lists each one with the screen it shows and the taps needed to reach it, so you can retake any screenshot from your own farm if you prefer.

If you replace a figure, keep the new screenshot at the same phone width, so the figures sit consistently down the page.

Figure	Screen	How to get there
Figure 1	The four bottom tabs, with My Farm selected.	Any main screen. Photograph the bottom bar.
Figure 2	The top bar: alerts, help, sync and settings.	Any main screen, at the very top.
Figure 3	The in-app help panel for the dashboard.	Any screen, tap the question mark in the top bar.
Figure 4	The My Farm dashboard, top of the screen.	Tap My Farm, scroll to the very top.
Figure 5	The Quick Actions list on the dashboard.	My Farm, scroll down one screen.
Figure 6	The milk production chart and the past-month heatmap.	My Farm, scroll to the Milk Production section.
Figure 7	Milking Status and Financial Overview, at the bottom of the dashboard.	My Farm, scroll to the bottom.
Figure 8	Customize Dashboard, with the reorder arrows and eye icons.	My Farm, tap the round button bottom-right.
Figure 9	The animal list with filter chips and search.	Tap Animals in the bottom bar.
Figure 10	The Add New Animal form, Basic Info tab.	Animals tab, tap Add Animal.
Figure 11	An animal profile, showing the header and the DIM / RPRO / ECD / LACT row.	Animals tab, tap any animal.
Figure 12	Basic Information on an animal profile.	Open an animal, scroll past Records & History.
Figure 13	Birth & Parentage, Physical Attributes and System Information.	Open an animal, scroll to the bottom.
Figure 14	The Services tab on an animal profile.	Open an animal, tap Services.
Figure 15	The Finance tab on an animal profile.	Open an animal, tap Finance.
Figure 16	The Timeline tab, with Hide Milk Production switched on.	Open an animal, tap Timeline, switch on Hide Milk Production.
Figure 17	Start Batch Activity: choosing what to do to the group.	Records tab, tap Start Batch Activity.
Figure 18	Step 1 of recording milk: the weight keypad.	Open an animal, tap Record Milk Production.
Figure 19	Step 2: choosing a bucket.	In the milk recording flow, enter a weight and tap Record Weight.
Figure 20	Step 3: the confirmation summary before saving.	In the milk recording flow, choose No bucket and tap the Confirm button.
Figure 21	Adding a milking bucket and its tare weight.	Records tab, tap Milking Buckets, then the add button.
Figure 22	Record Past Milk Production: pick the date and session first.	Records tab, tap Record Past Milk Production.
Figure 23	Today's Milk Production, by animal and session.	My Farm, tap Today's Milk Production.

Figure	Screen	How to get there
Figure 24	The Milk Production Report, day by day for each animal.	Records tab, tap Milk Production Report.
Figure 25	Recording a heat detection.	Open an animal, tap Services, then Record Heat Detection.
Figure 26	An animal's breeding records.	Open an animal, tap Services, then View Breeding Records.
Figure 27	The alerts list, showing overdue breeding items.	Tap the bell icon in the top bar.
Figure 28	Semen Inventory, with the straws in stock.	Records tab, tap Semen Inventory.
Figure 29	The Bull Directory.	Records tab, tap Bull Directory.
Figure 30	Recording a treatment, including its withdrawal period.	Open an animal, tap Services, then Record Treatment.
Figure 31	An animal's health records.	Open an animal, tap Services, then View Health Records.
Figure 32	Medicine Inventory, with stock levels.	Records tab, tap Medicine Inventory.
Figure 33	The Veterinarian Directory.	Records tab, tap Veterinarian Directory.
Figure 34	Feed Inventory: feed bought and used.	Records tab, tap Feed Inventory.
Figure 35	The Finance Overview tab.	Tap Finance in the bottom bar.
Figure 36	Recording an expense.	My Farm, tap Record Expense.
Figure 37	The Transactions tab with filters and a day's entries.	Finance tab, tap Transactions.
Figure 38	The Budgets tab.	Finance tab, tap Budgets.
Figure 39	The Reports tab, showing Profit & Loss.	Finance tab, tap Reports.
Figure 40	The Records tab, top of the list.	Tap Records in the bottom bar.
Figure 41	The Customer Directory.	Records tab, tap Customer Directory.
Figure 42	Adding a standing order.	Records tab, tap Standing Orders, then the add button.
Figure 43	Default Milk Price, with earlier prices below the current one.	Records tab, tap Default Milk Price.
Figure 44	Recording a milk sale.	My Farm, tap Record Milk Sale.
Figure 45	Logging a milk rejection.	Records tab, tap Milk Rejections Log, then the add button.
Figure 46	Adding a collection centre.	Records tab, tap Collection Centers, then the add button.
Figure 47	Team & Roles, with members grouped by role.	Settings, tap Team & Roles.
Figure 48	The Roles screen, with the access key and the per-role strips.	Settings › Team & Roles, tap the shield icon in the top bar.
Figure 49	One role opened, showing exactly which screens it can use.	On the Roles screen, tap a role.
Figure 50	The Sync Status screen.	Tap the gear icon in the top bar, then Data Synchronization.
Figure 51	The Settings screen.	Tap the gear icon in the top bar.
Figure 52	The rest of Settings: Application, About and Log Out.	Settings, scroll to the bottom.
Figure 53	Upcoming alerts: vaccinations, pest control and low stock.	Tap the bell icon in the top bar, scroll to Upcoming.

Appendix B: Glossary

Term	Meaning
Batch activity	An action applied to a group of animals at once rather than one at a time.
Bucket	A container with a known weight, registered in the app so its weight is deducted automatically from a milk weighing.
Delta sync	Sending only what has changed since the last sync, rather than everything.
DIM	Days in milk: how long since the animal last calved.
Dry / dry-off	A cow deliberately stopped from milking ahead of calving. Shown as a Dry badge on the animal.
ECD	Expected calving date.
Heat	The period when a cow can conceive. Recording it starts the app's breeding reminders.
LACT	The lactation the animal is currently in.
Offline-first	Designed so every feature works with no connection, syncing later.
RPRO	The animal's current reproduction standing, shown on the profile header.
Withdrawal period	The time after a treatment during which the animal's milk must not be sold.

About this document

This guide was written from the DairyBook application itself, working screen by screen through the interactive demo at demo.dairybook.app, together with the product information published on dairybook.app. Screen names, field names, button labels and menu contents are reproduced as they appear in the app at version 1.13.0.

Where the app displays a figure or a status in the sample farm, it has been used as an example only. Your own figures will differ.

Anything not observed directly in the app has been left out rather than guessed. If a screen in your build differs from the description here, trust the app and update this guide.