NEXTOREx

NEXTOREx Complete User Manual

Step-by-step guides for every part of NEXTOREx: POS, inventory, purchasing, accounting, CRM, users, plans and white label.

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Getting Started

Sign in, set up and make your first sale

Welcome to NEXTOREx

A short tour of what NEXTOREx does and the order to set things up in.

Plan: All plans

What this does

NEXTOREx is business software that runs in your web browser. It helps you sell, keep track of stock, buy from suppliers, follow up with leads and see your accounts, all in one place. Which parts you can use depends on your plan.

The apps you may see are:

- **POS & Inventory**: sales at the counter, customers, products and stock, suppliers and purchases, accounting and reports. Basic Manufacturing is part of it on the Pro plan and above.
- **CRM**: leads, deals, tasks and appointments.
- **Education**: students, fees, attendance and, on larger packages, staff, exams, timetable, library, transport, hostel and payroll. Start with Education getting started and academic structure.

Each app is bought on its own and keeps its own package. See Education plans, limits and combining apps.

Steps

Follow the guides in this order. Each one takes a few minutes.

1. Sign in and understand the dashboard
2. Complete your company setup
3. Add your first user
4. Add your first product
5. Add a customer
6. Make your first sale
7. Create your first purchase
8. Understand your accounts
9. Where to get help

What happens next

After these steps your business has a company, a product, a customer, a sale and a purchase, and you can see how they appear in your stock and accounts.

Important notes

- You do not need to learn everything at once. Start with selling, then add the rest when you need it.
- If a screen or button in these guides is not on your screen, your plan or your role may not include it. See How access works.

Related guides

- Search the Help Center

Sign in and understand the dashboard

Sign in to NEXTOREx and learn where the menu, app switcher and settings are.

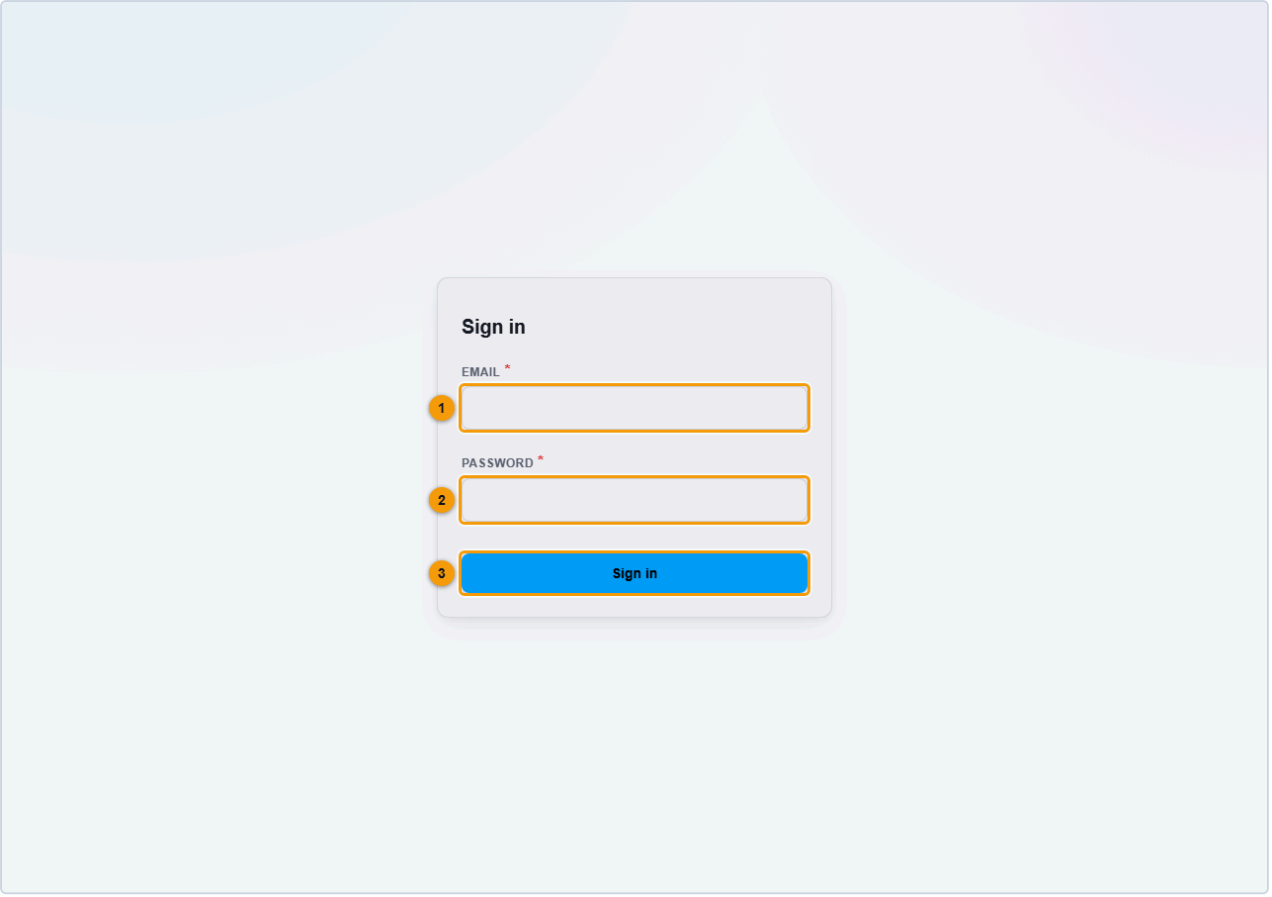
Plan: All plans

What this does

This guide shows how to sign in and find your way around.

Steps

1. Open the sign-in address you were given in your web browser.
2. Enter your **Email** (1) and **Password** (2).

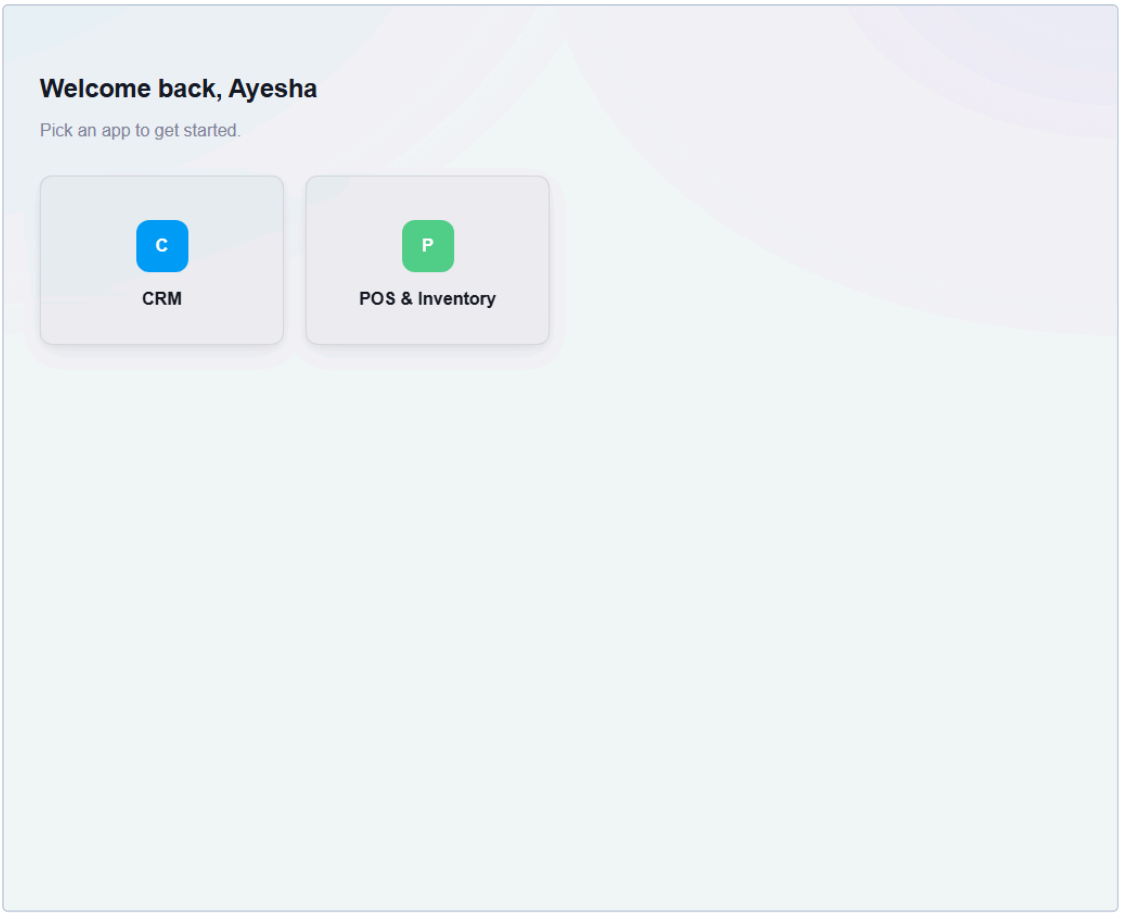


Email (1), password (2) and Sign in (3).

3. Click **Sign in** (3).

What happens next

NEXTOREx opens an app for you. If your plan has more than one app, you may land on a page that says *Welcome back* with a card for each app, such as **CRM** and **POS & Inventory**. Click a card to open that app.



Pick an app to get started.

Inside an app you will see:

- **Left menu**: the groups and pages for the app. Use **Filter menu** at the top to search it. Click **Collapse** at the bottom to make it narrower.
- **Top bar**: your business name, the place in your company you are working in, a **Switch app** button, the light and dark mode button, notifications and your profile picture. Click your picture for **Settings** and **Sign out**.
- **Page area**: the page you opened, with a title and buttons such as **Add Product**.

On most list pages:

- Click a row to select it.
- Double-click a row to open it.
- Right-click a row to see its actions.

Important notes

- If you cannot see a menu item, your role or plan may not include it. See How access works.

Related guides

- Complete your company setup

Your profile, password and preferences

Update your name and contact details, change your password, and set your language, time zone and date format.

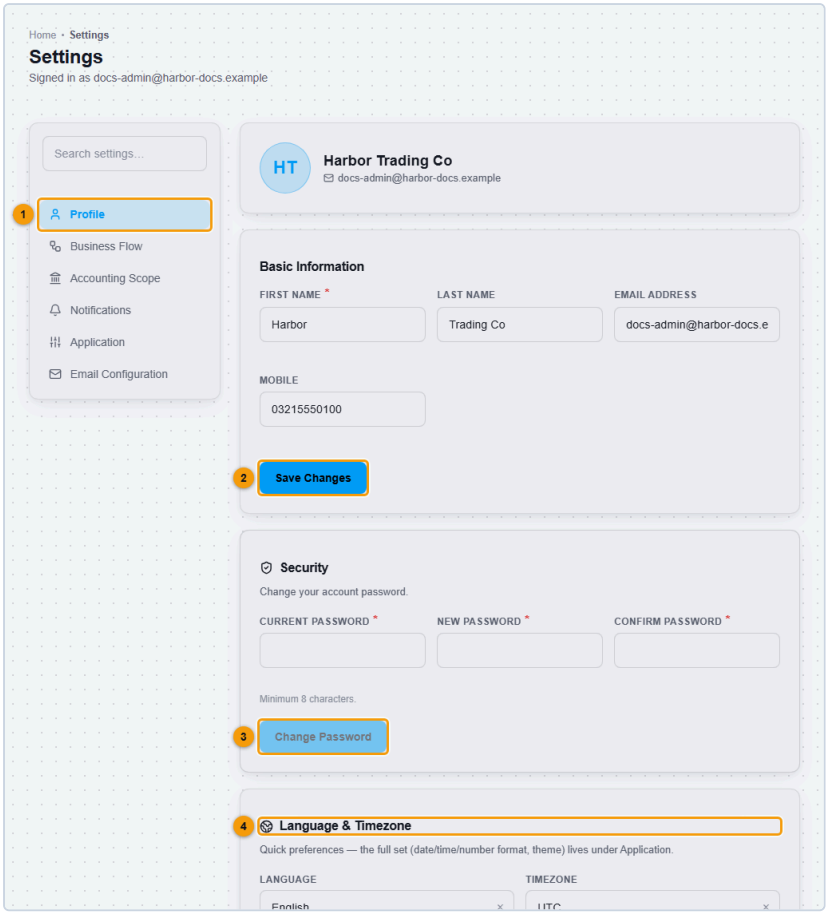
Plan: All plans

What this does

The **Settings** page is where you look after your own sign-in details and how NEXTOREx shows dates and times to you.

Open Settings

Open the **Settings** page. The **Profile** tab opens first.



Profile (1), Save Changes (2), Change Password (3) and Language & Timezone (4).

The left side lists the settings groups: **Profile**, **Business Flow**, **Accounting Scope**, **Notifications**, **Application** and **Email Configuration**.

Update your details

1. Under **Basic Information**, change your **First name**, **Last name** or **Mobile**.
2. Click **Save Changes** (2).

Change your password

1. Under **Security**, type your **Current password**.
2. Type a **New password** and type it again under **Confirm password**. Use at least 8 characters.
3. Click **Change Password** (3).

Set your language and time zone

Under **Language & Timezone** (4), choose your **Language** and **Timezone** and click **Save**. Under **Date & Time Format** choose how dates and times appear, then click **Save Format**. The example line shows what the format looks like.

Important notes

- You can only change your own password here. An administrator can reset a staff member's password from the user's edit page. See Edit a user.

Related guides

- Sign in and find your way around
- Where to get help

Complete your company setup

The first-time setup wizard that creates your company and the branches your staff work in.

Plan: All plans

What this does

The first time you sign in to a new business, NEXTOREx asks you to set up your company. You do this once. It creates your company and the structure your staff and records sit in.

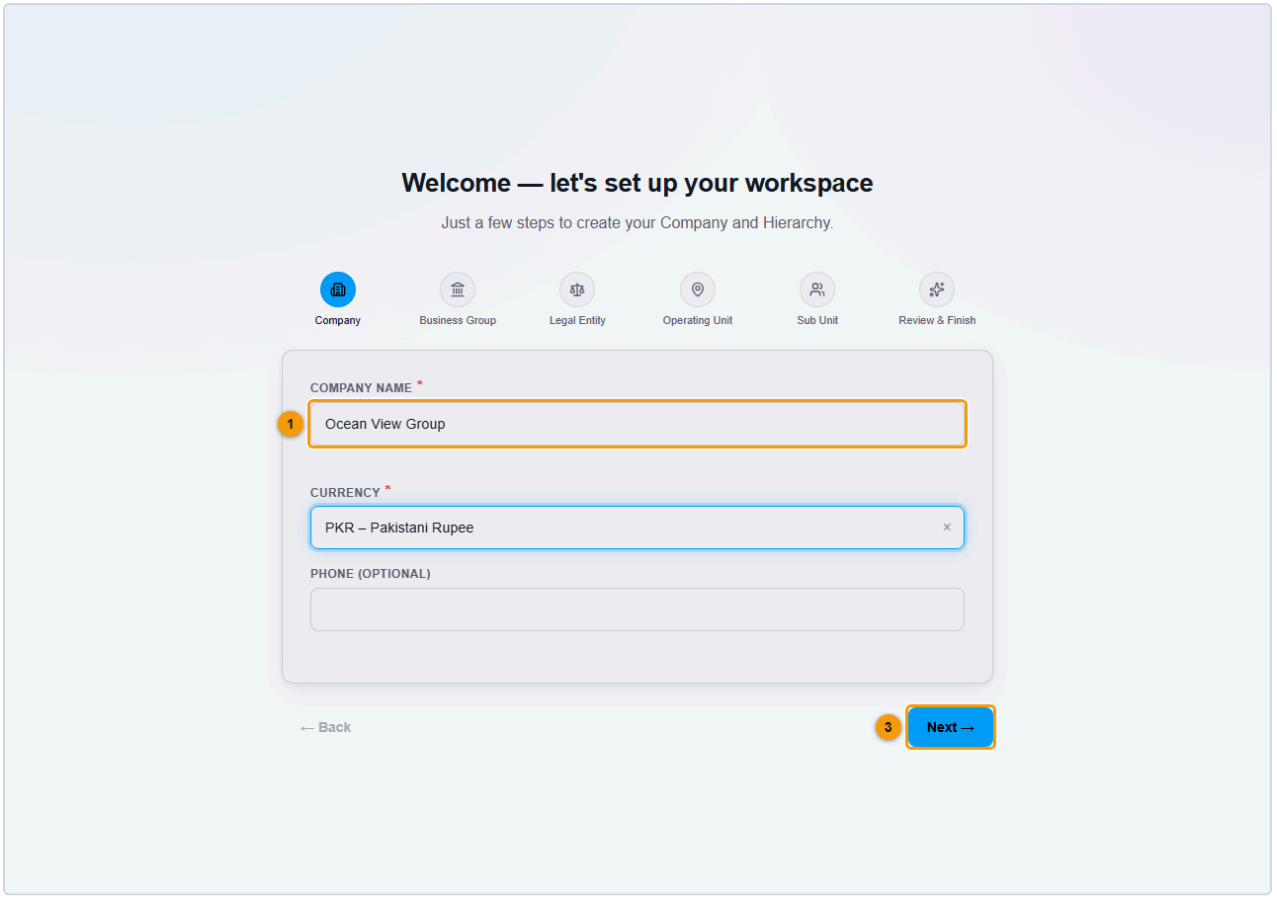
Before you start

- Have your company name and currency ready. For Legal Entity you will also need the country.

Steps

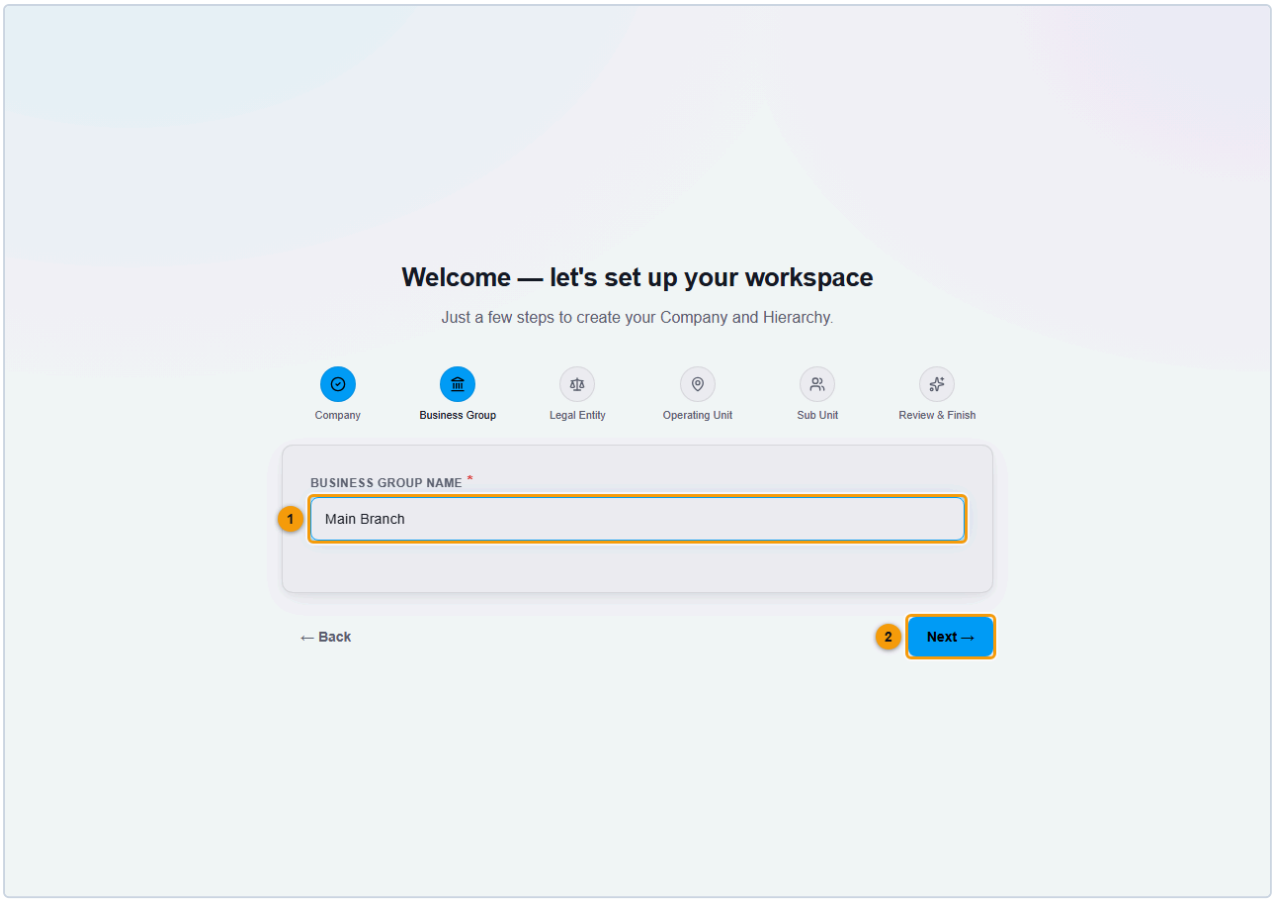
The page says *Welcome, let's set up your workspace* and shows six steps.

1. **Company**: enter your **Company name** (1), choose the **Currency** (2), and optionally add a phone number. Click **Next** (3).



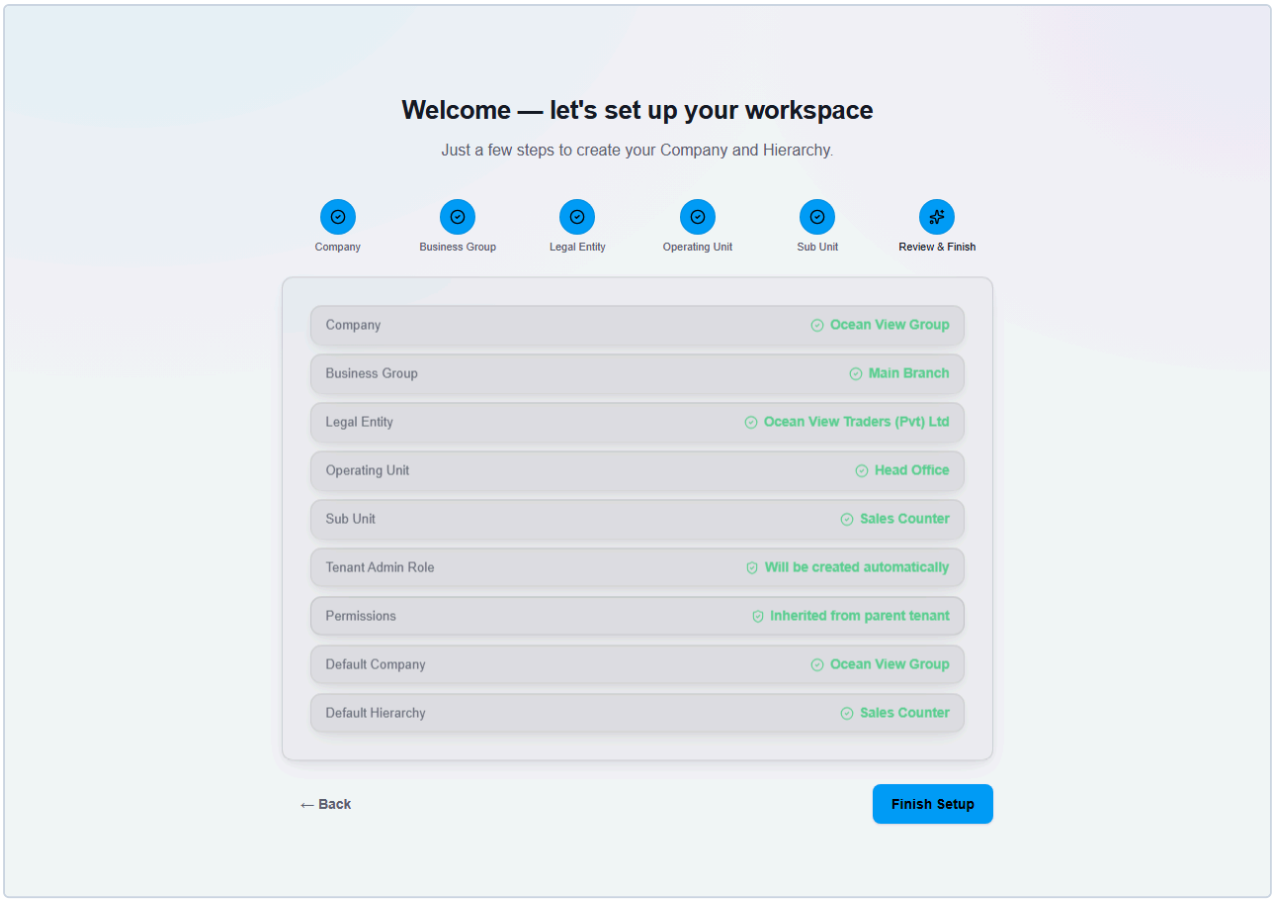
Company name, currency and Next.

2. **Business Group**: enter a name, for example *Main Branch*. Click **Next**.



Name your first branch or division.

3. **Legal Entity**: enter the name of your legal entity. Choose the **Currency** and **Country**. The registration number, STRN and address are optional. Click **Next**.
4. **Operating Unit**: enter a name, for example *Head Office*. Country, state and city are optional. Click **Next**.
5. **Sub Unit**: enter a name for the smallest unit where your staff work, for example *Sales Counter*. Click **Next**.
6. **Review & Finish**: check the summary of your company and units, then click **Finish Setup**.



Check everything, then click Finish Setup.

What happens next

NEXTOREx creates your company, your first Admin role and your default place to work, then opens the app. You can now add users, products and customers.

Important notes

- Every step needs a name before you can continue.
- Use a company name you have not entered before. If the wizard shows an error and you start again with the same name, it may fail. Use a different name or ask support.

Related guides

- Your company and branches
- Add your first user

Add your first user

Give a team member their own login with the right access.

Plan: All plans

What this does

You can run NEXTOREx alone, but a team member should have their own login so you know who did what.

Steps

1. Create a role for the job. Open **User Management**, then **Roles**, and click **Add Role**. See Roles.
2. Open **User Management**, then **Users**, and click **Add User**.
3. Enter the person's name, email and a password. Choose a **Department** and a **Designation**.
4. On the last step, click **+ Add Assignment**, choose where they work and their **Role**, mark it **Primary**, and click **Create User**.

The full steps with pictures are in Add a user.

What happens next

The person appears in your **Users** list and can sign in with their email and password.

Related guides

- Add a user
- How access works

Add your first product

Create a warehouse and your first product, then add stock to it.

Plan: Starter and above

What this does

Before you can sell, NEXTOREx needs to know what you sell and where you keep it.

Steps

1. Create a warehouse. Open **Inventory**, then **Warehouse**, click **Add Warehouse**, name it and switch on **Default warehouse**. See Warehouses.
2. Open **Inventory**, then **Product**, and click **Add Product**.
3. Enter the **Product name**, **SKU** and **Base UOM** (the unit you count in, such as Piece).
4. Enter the **Cost price** and **Sale price**, then click **Save Product**. See Add a product.
5. Add the stock you already have. Open **Stock**, then **Stock Adjustment**, click **Create adjustment**, choose the product and warehouse, choose **Opening Balance**, enter the quantity and click **Record Adjustment**. See Stock adjustments.

What happens next

Your product can now be sold at the POS. Its quantity shows in the product search at checkout.

Related guides

- Add a product
- Stock adjustments

Add a customer

Save a customer so you can sell to them and track what they owe.

Plan: Starter and above

What this does

A customer record lets you sell to a named person or business, and see what they owe you. For quick cash sales you can use the built-in **Walk-in Customer** instead.

Steps

1. Open **Customer**, then **All Customers**.
2. Click **Add Customer**.
3. Enter the **Customer name**, **Phone** and **Email**.
4. Click **Save**.

The full steps with pictures are in Customers.

What happens next

The customer appears in your list. You can pick them at the POS and on sales orders.

Related guides

- Customers
- Make your first sale

Make your first sale

Sell a product at the POS and see how it changes your stock.

Plan: Starter and above

What this does

This walks you through one complete sale at the counter.

Before you start

- You have a product with stock.

Steps

1. In the left menu, click **POS Checkout**.
2. Click the search box, type two or more letters of your product name, and press **Enter**. The product is added to the cart.
3. Leave the customer as **Walk-in Customer**, or click **Change** to choose a customer.
4. Leave the payment method as **Cash** and the amount received as the total.
5. Click **Checkout**.

The full steps with pictures are in Make a sale at the POS.

What happens next

The **Sale Complete** screen shows your sale number and total. Open **Stock**, then **Movements** to see the stock go down.

Related guides

- Make a sale at the POS
- Create your first purchase

Create your first purchase

Add a supplier, order goods from them and receive the goods into stock.

Plan: Starter and above

What this does

This walks you through buying stock from a supplier.

Steps

1. Open **Supplier**, then **All Suppliers**, click **New Supplier**, enter the name and click **Save Supplier**. See Suppliers.
2. Open **Supplier**, then **Purchase Order**, and click **New purchase order**. Choose the supplier and warehouse, add the product and quantity, and click **Create Purchase Order**. See Purchase orders.
3. On the order page, click **Mark ordered**.
4. When the goods arrive, click **Receive goods**, check the quantity and click **Confirm Receipt**. See Receive goods.

What happens next

Your stock goes up. To record paying the supplier, see Pay a supplier.

Related guides

- Purchase orders
- Pay a supplier

Understand your accounts

See how sales, purchases and payments appear in your accounts, and where to look.

Plan: Starter and above (some parts need Business and above)

What this does

NEXTOREx keeps your accounts for you. When you sell, buy or record a payment, it posts the matching entries in your accounts. You do not need to be an accountant to use it, but it helps to know where to look.

Steps

Look at these places after your first sale and purchase:

1. **Customer**, then **Ledger**: what each customer owes you. See Customer and supplier ledgers.
2. **Supplier**, then **Ledger**: what you owe each supplier.
3. **Finance**, then **Chart of Accounts**: the list of your accounts. See Chart of Accounts.
4. **Finance**, then **Journal Entry**: every entry, including the ones NEXTOREx made for you.
5. **Reports**: **Profit & Loss** and **Balance Sheet**. See Profit and Loss report.

What happens next

As you work, you will use:

- Receive a customer payment when a customer pays what they owe.
- Pay a supplier when you pay a supplier.
- Bank and cash accounts to track your bank and cash.

Important notes

- The vouchers, bank features and financial reports are part of Business and higher plans.
- NEXTOREx does not have a bank reconciliation screen or a Period Close. It does not replace your accountant's year-end work.

Related guides

- Chart of Accounts
- Vouchers and journal entries

Where to get help

How to find answers in the Help Center and how to reach the NEXTOREx team.

Plan: All plans

What this does

This page tells you where to look when you are stuck.

Steps

1. **Search this Help Center.** Use the search box at the top of every Help page. Type a few words, for example *refund* or *cheque*, and open a guide.
2. **Browse by topic.** The Help Center home page groups guides by area, such as POS & Sales, Inventory and Accounting.
3. **Check the Troubleshooting & FAQ section** for quick answers. See Common questions.
4. **Contact the team.** Use the Contact page and send us a message. Tell us what you were doing, what you expected and what happened. A picture of the screen helps.

What happens next

We will get back to you. If a guide is missing or wrong, tell us so we can fix it.

Related guides

- Common questions
- Welcome to NEXTOREx

POS & Sales

Checkout, sales orders, delivery and returns

Make a sale at the POS

Use POS Checkout to add products to a cart, pick a customer, take payment and finish the sale.

Plan: Starter and above

What this does

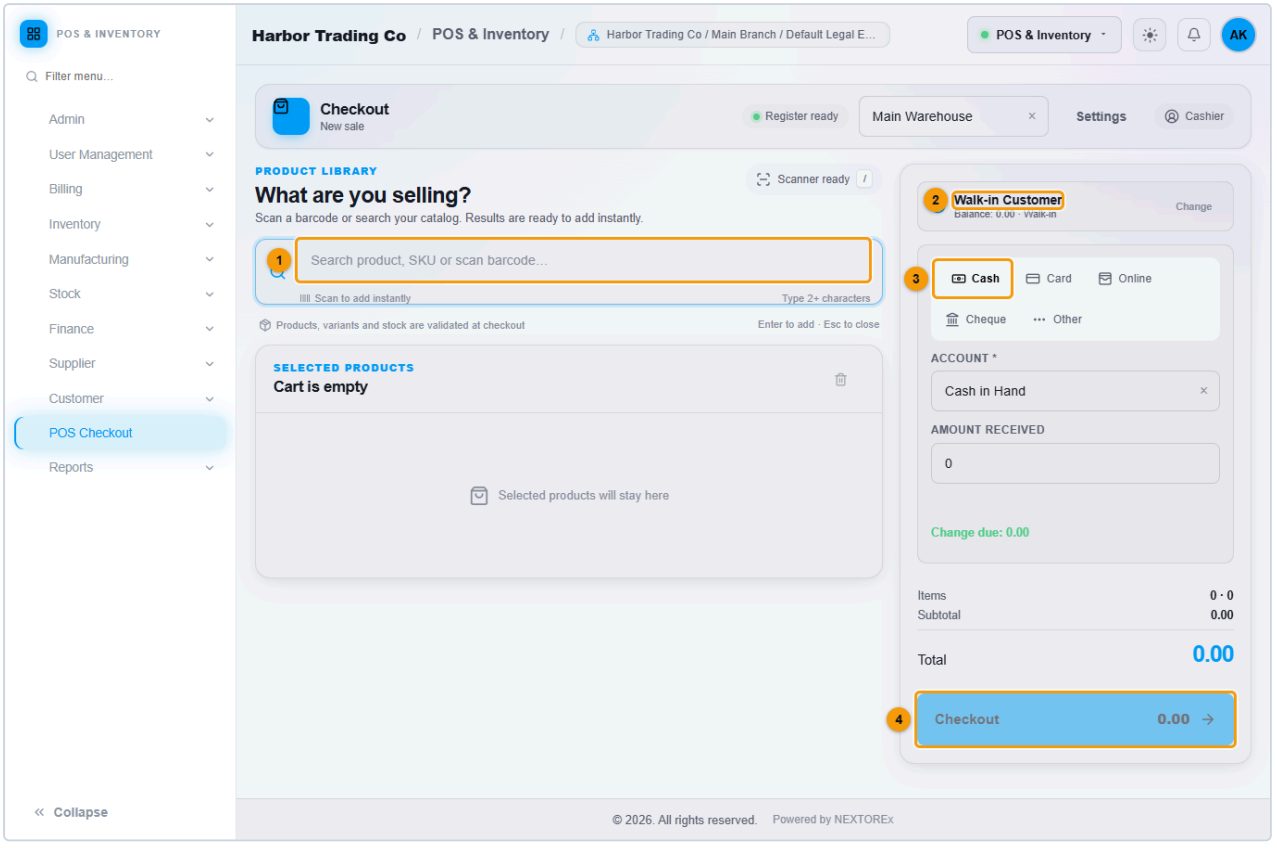
POS Checkout is the quick sale screen for the counter. You add products, take payment and finish in one screen. Each sale reduces your stock and is recorded in your sales and accounts.

Before you start

- You need at least one product with stock in a warehouse.
- For a named customer, create the customer first. Otherwise sell to **Walk-in Customer**.

Steps

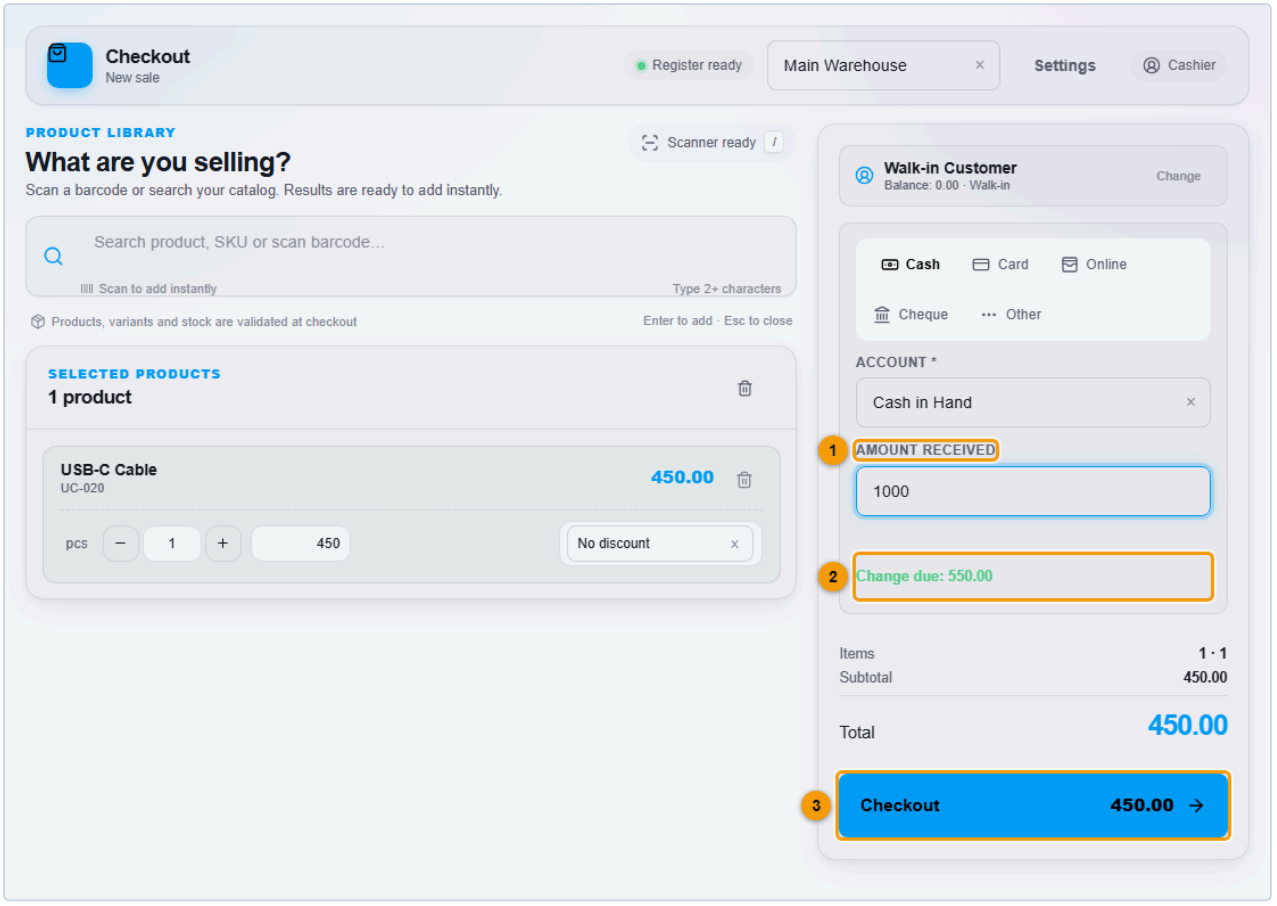
1. In the left menu, click **POS Checkout**.



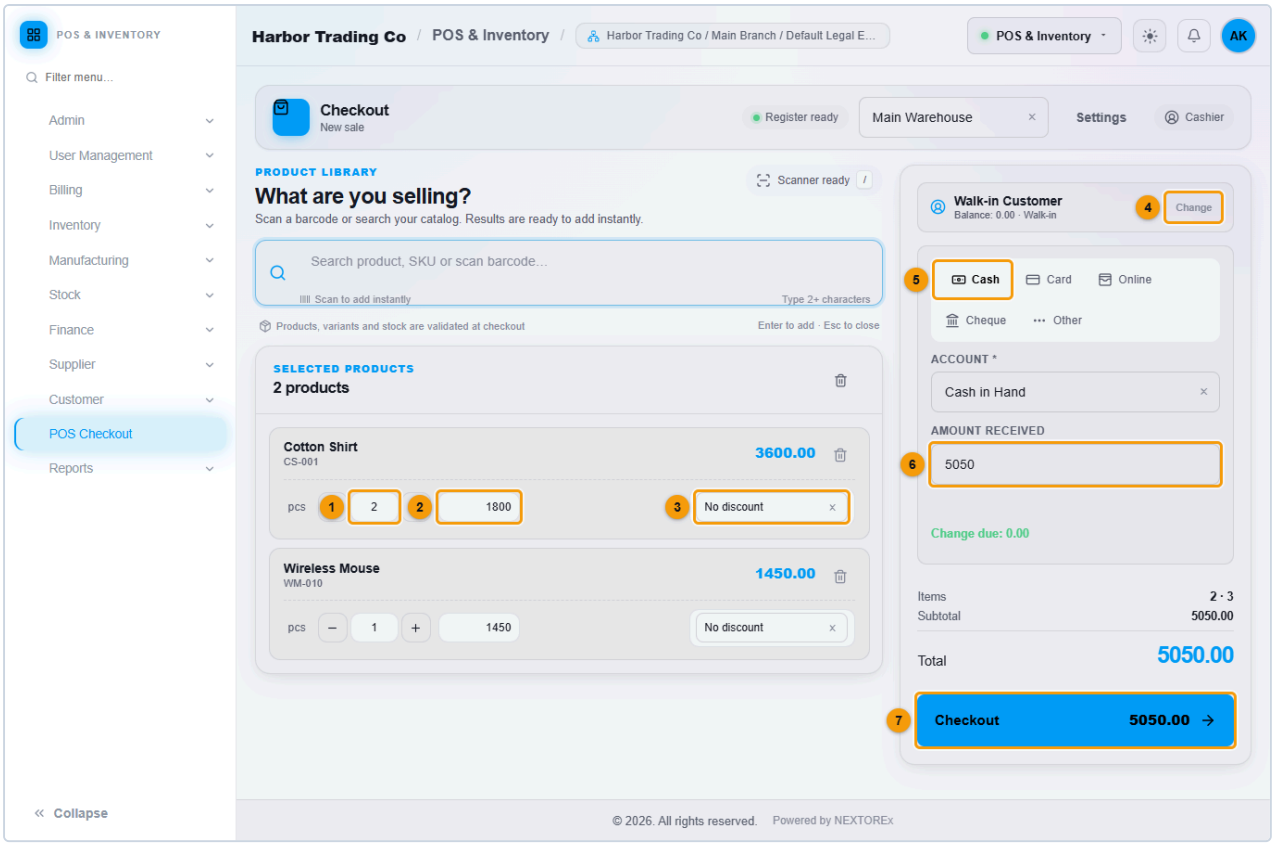
The checkout screen. Numbers match the steps below.

2. Check the warehouse at the top of the page. Your default warehouse is chosen for you.

3. Click the search box (1). Type at least two letters of a product name or SKU, or scan the barcode. Press **Enter** or click the product to add it to the cart.
4. Change the quantity with the **−** and **+** buttons or by typing a number. You can change the **unit price** and add a **discount** to a line.
5. To sell to a named customer, click **Change** next to the customer (2), search by name, phone or email, and pick the customer. Click **Use Walk-in** to go back to a walk-in sale.
6. Choose how the customer pays (3): **Cash**, **Card**, **Online**, **Cheque** or **Other**. Check the **Account** that will receive the money, for example *Cash in Hand*.
7. Leave **Amount received** as the total, type a smaller amount for a part payment, or, for a **Cash** sale, type the cash the customer handed over. If it is more than the total, the screen shows **Change due** (2). See Credit and part payments.



Amount received (1), Change due (2) and Checkout (3).

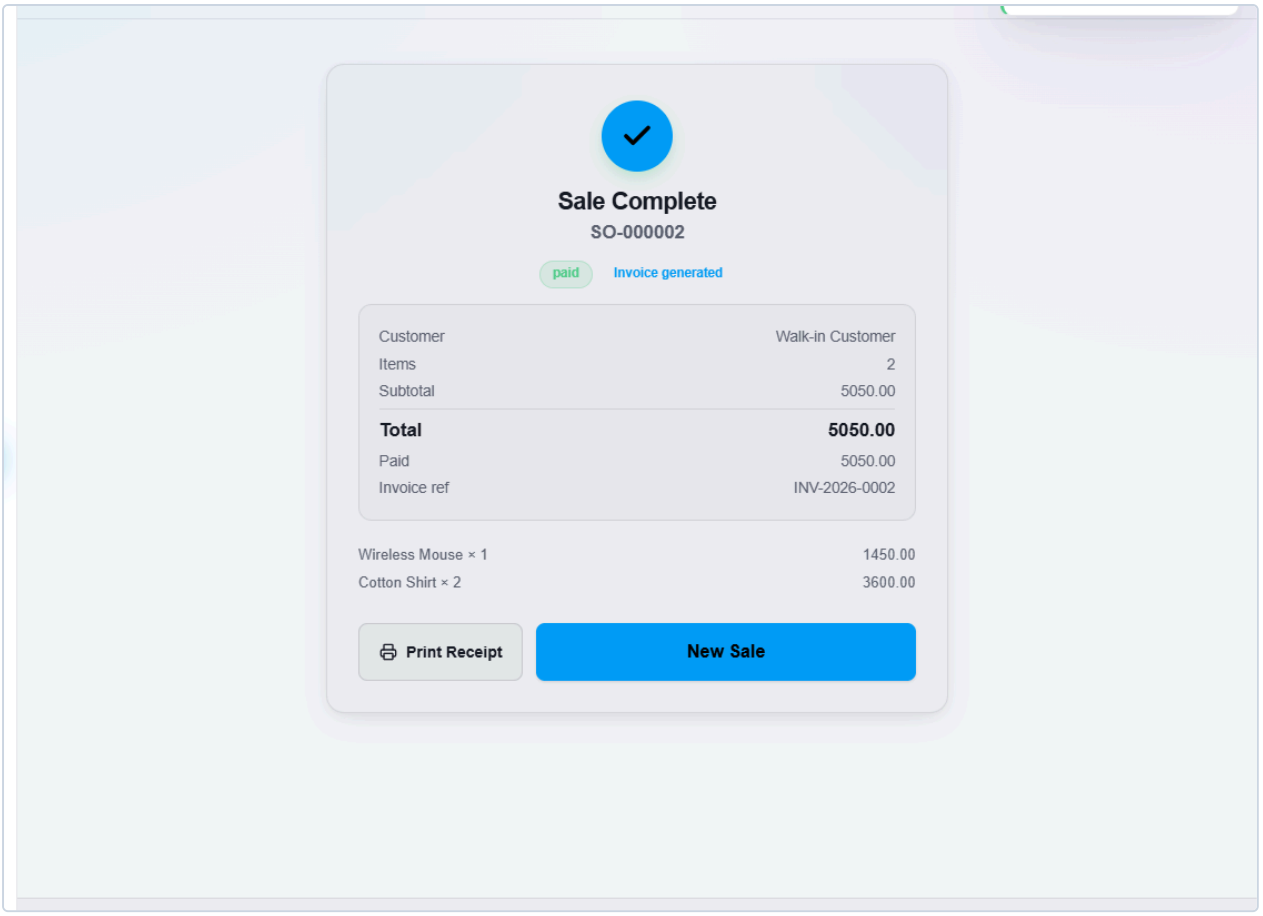


Quantity (1), price (2), discount (3), customer (4), payment method (5), amount received (6) and Checkout (7).

8. Click **Checkout** (7).

What happens next

The **Sale Complete** screen shows the sale number, the customer, the total and the amount paid. An invoice is created for the sale.



Print a receipt or start the next sale.

- The print window of your browser opens by itself with the receipt. Click **Print Receipt** to print it again. See POS settings and receipts.
- Click **New Sale** to start the next sale.

Your stock goes down by the quantities sold.

Important notes

- If a cash customer hands over more than the total, enter what they gave you. NEXTOREx records only the sale amount as the payment and shows the **Change due** for you to hand back. The extra cash is not recorded as a payment.
- POS Checkout does not add sales tax to the cart. If a sale needs sales tax, create it as a sales order.
- You cannot finish a sale with a payment of zero. To sell on credit with nothing paid, use a sales order.

Related guides

- POS settings and receipts
- Sales returns
- Credit and part payments
- Customers
- Sales orders

Credit and part payments

Sell to a customer who pays only part now, and see how much they still owe.

Plan: Starter and above

What this does

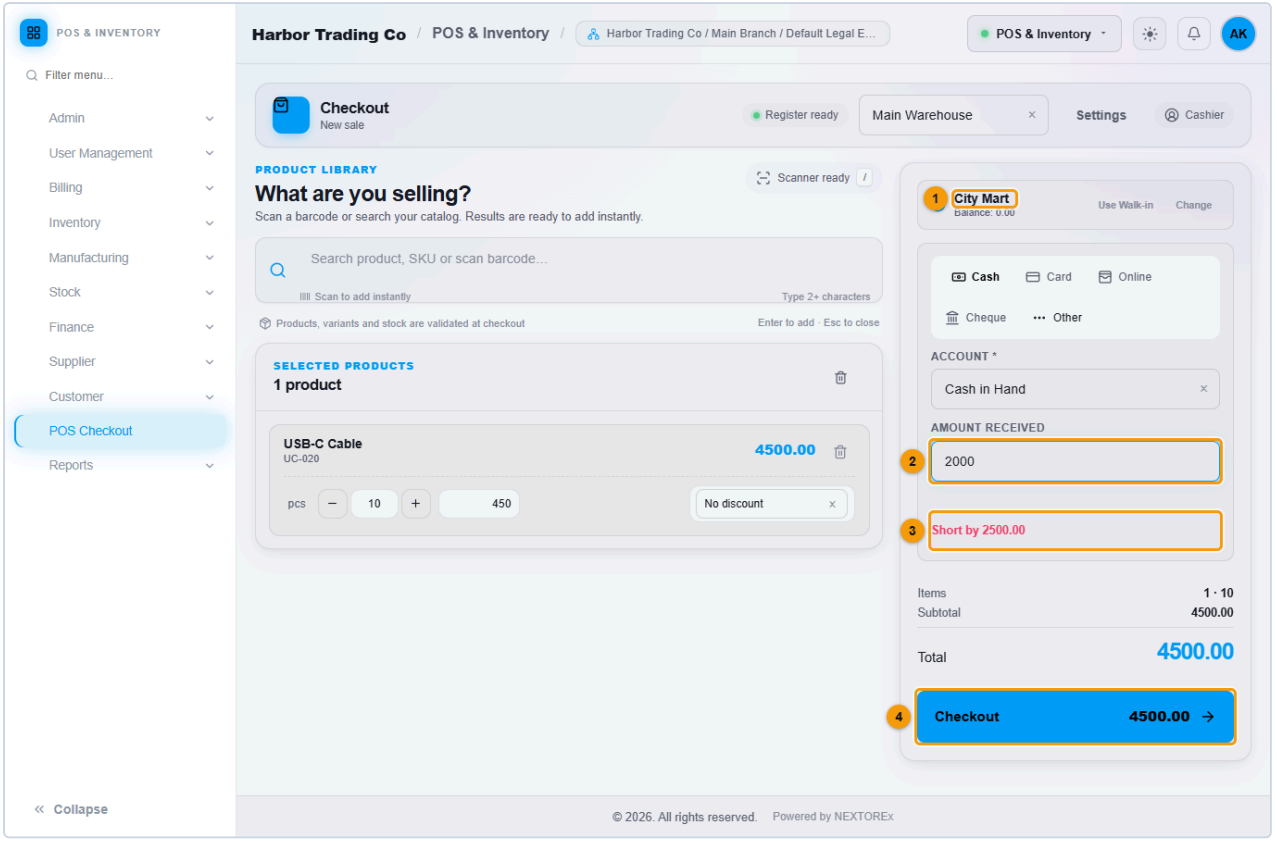
Sometimes a customer pays only part of the bill. NEXTOREx records the part payment and keeps the rest as an amount the customer owes you.

Before you start

- Create the customer. Part payments are recorded against a named customer.

Steps

1. Open **POS Checkout** and add the products. See Make a sale at the POS.
2. Click **Change** and choose the customer (1).
3. Type the amount the customer is paying now in **Amount received** (2). A red message (3) shows how much is **Short by**.

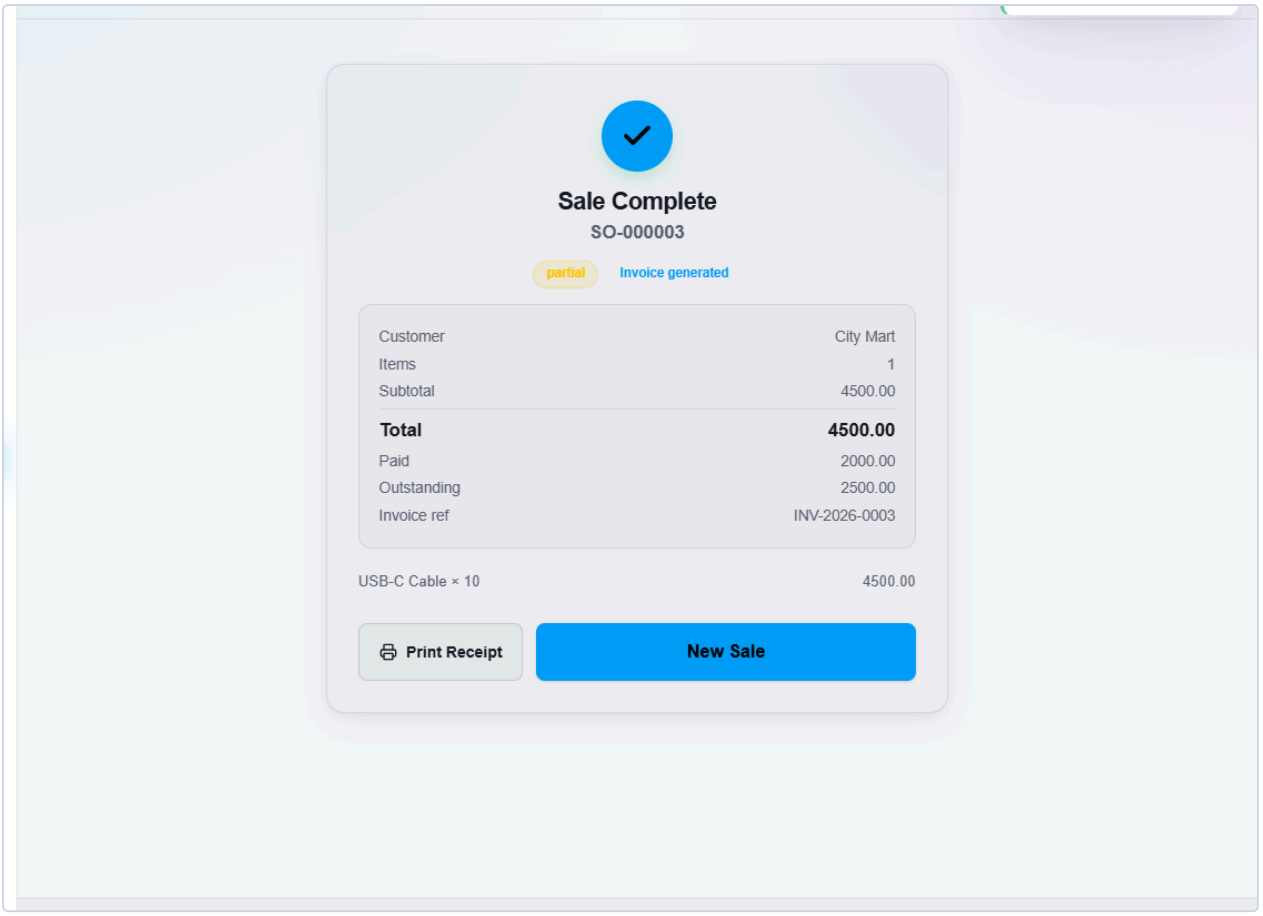


City Mart pays 2,000 of 4,500.

4. Click **Checkout** (4).

What happens next

The sale is marked **partial**. The screen shows how much was **Paid** and how much is **Outstanding**.



The customer still owes 2,500.

The outstanding amount is added to the customer's balance. You can see it in the **Customer Ledger**. When the customer pays more later, record it with a receipt voucher.

Important notes

- POS Checkout needs a payment of at least 0.01. For a sale where nothing is paid now, create a sales order instead.
- For a cash sale you may enter more than the total. NEXTOREx records only the total as the payment and shows the **Change due**.

Related guides

- Receive a customer payment
- Customer and supplier ledgers

Customers

Add customers, see what each one owes, and open their ledger.

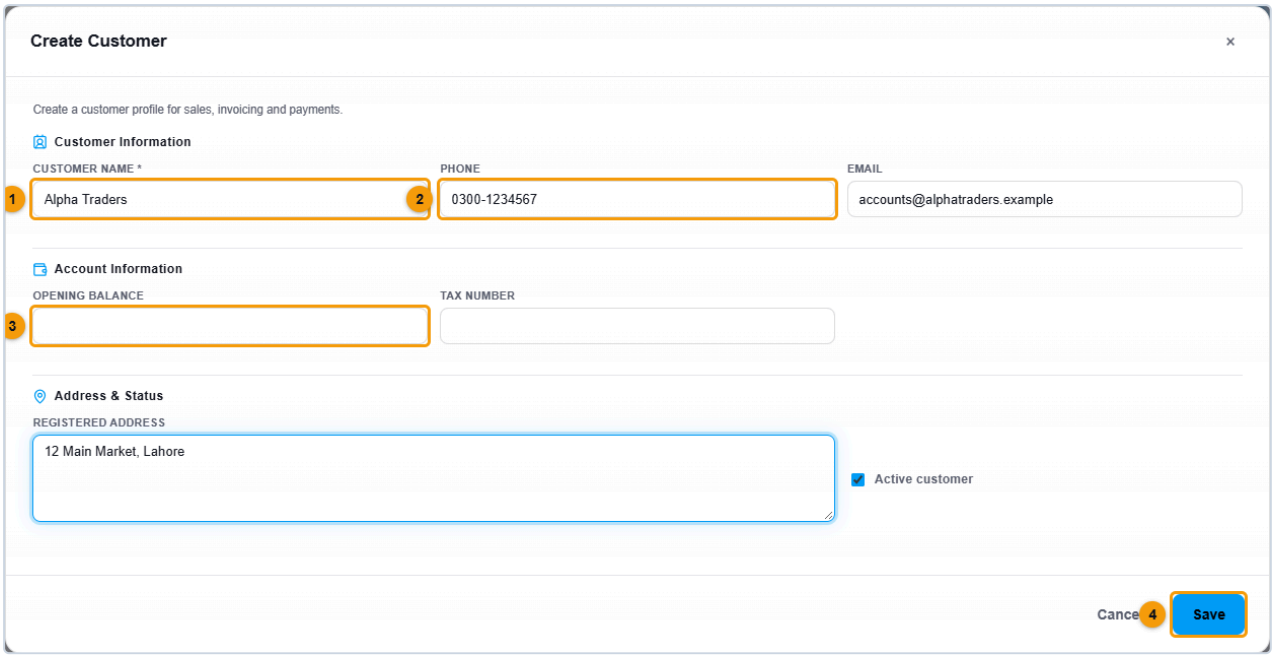
Plan: Starter and above

What this does

A customer record keeps a person or business's contact details and what they owe you. You pick a customer when you sell, so each sale is recorded against them.

Steps

1. Open **Customer**, then **All Customers**.
2. Click **Add Customer**. The **Create Customer** window opens.

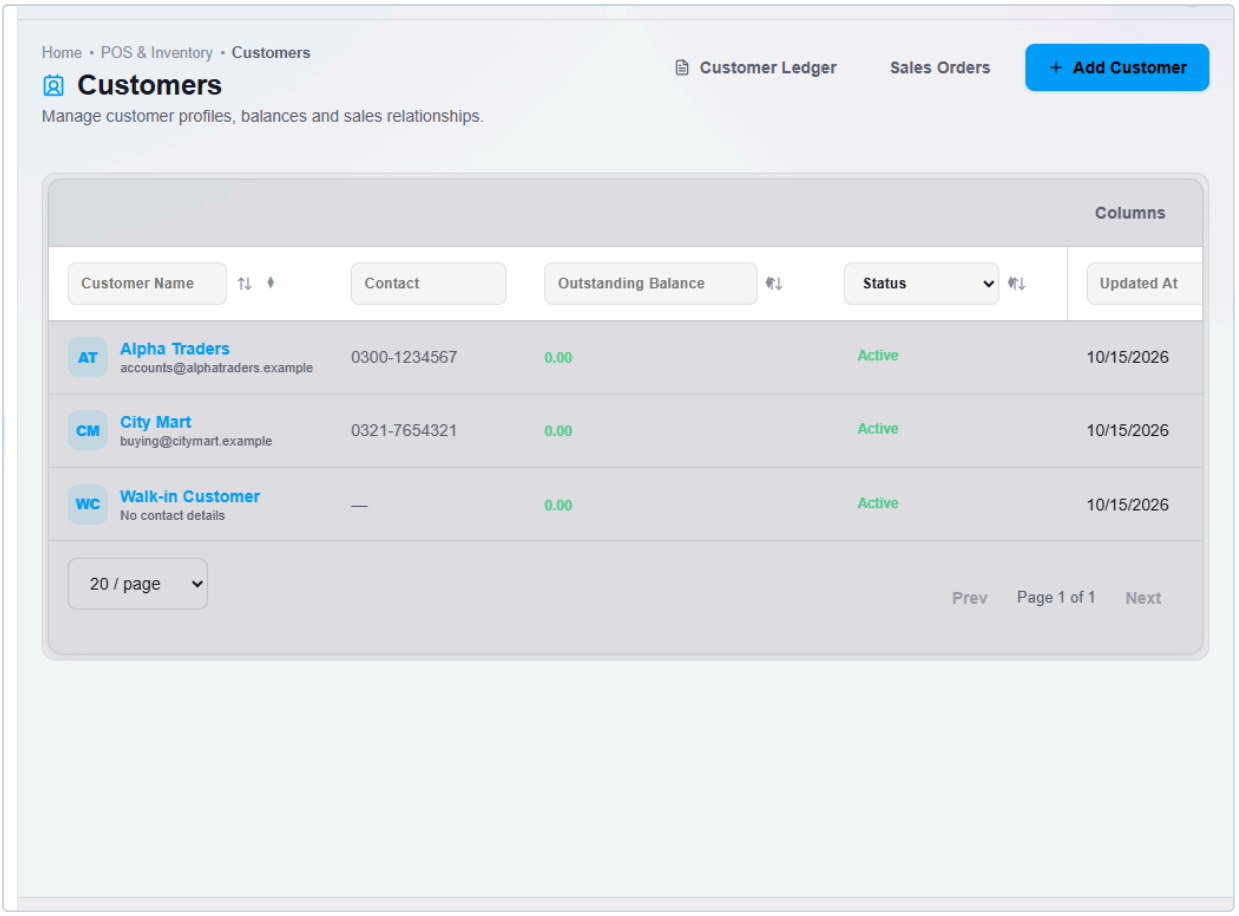


Name, phone and opening balance.

3. Enter the **Customer name** (1). This is the only required detail.
4. Add the **Phone** (2) and **Email**. You will use them to search for the customer at the POS.
5. If the customer already owes you money from before you started using NEXTOREx, enter it as the **Opening balance** (3).
6. Add the **Tax number** and **Registered address** if you need them on documents.
7. Click **Save** (4).

What happens next

The customer appears in the list with their outstanding balance.



Walk-in Customer is always there for cash sales.

- Double-click a customer to open their profile. The **Overview** tab shows contact details and balance. The **Transactions** tab lists their transactions.
- Click **Customer Ledger** at the top of the list for balances and statements of all customers.

Important notes

- **Walk-in Customer** is a built-in customer for sales where you do not need to record who bought.

Related guides

- Customer and supplier ledgers
- Make a sale at the POS

Sales orders

Create an order for a customer, confirm it, deliver the goods and collect payment later.

Plan: Starter and above

What this does

A sales order is an order from a customer that you deliver and get paid for later. Use it when the customer does not pay at the counter, when you deliver goods after taking the order, or when the sale needs sales tax.

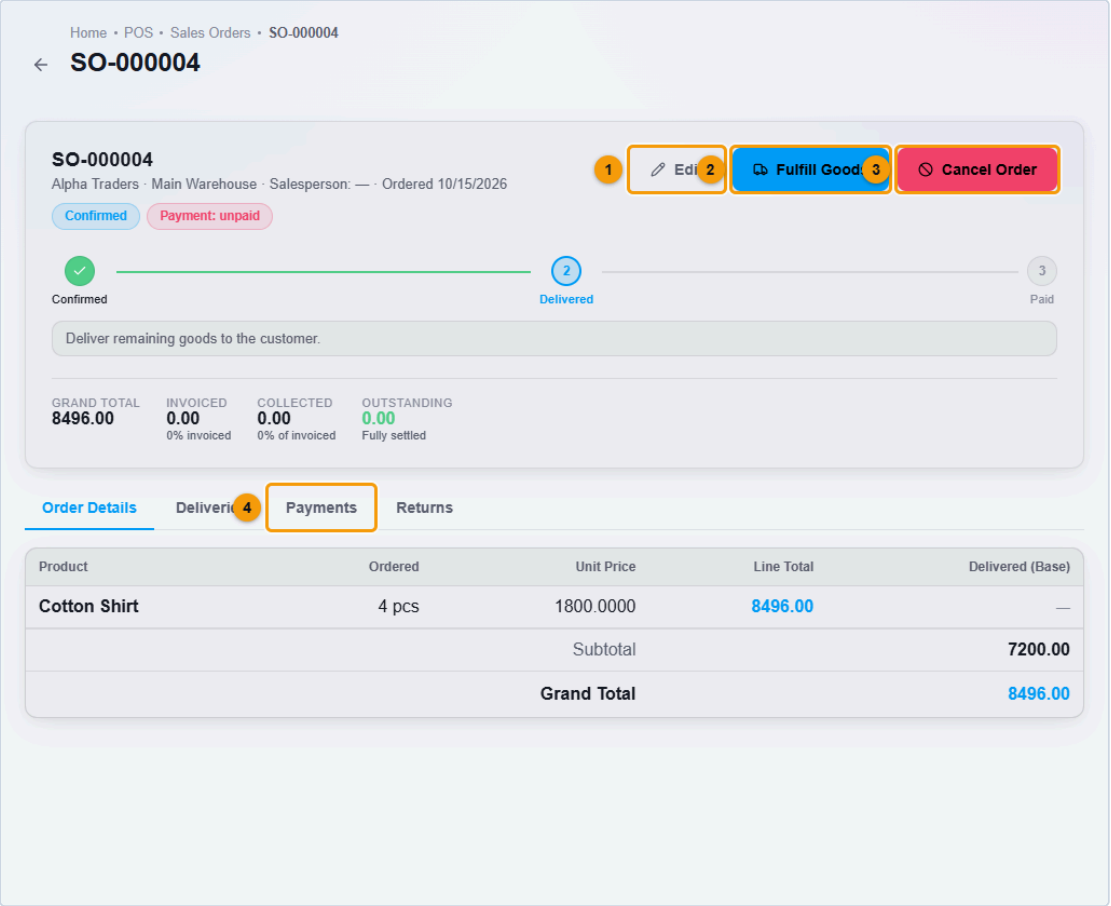
Before you start

- Create the customer and the products.

Steps

1. Open **Customer**, then **Sales Order**.
2. Click **Create Sales Order**. The **New Sales Order** window opens.
3. Under **Customer**, search for and choose the customer.
4. Choose the **Sales warehouse**, the warehouse the goods will come from. The order date is today unless you change it.
5. Under **Order Items**, search for a product by name, SKU or barcode and pick it. Set the **Qty**. The **Unit price** is filled in from the product. If the product has a tax rate, it is filled into **Tax**.
6. Click **Add product** for more lines. Check the **Order Summary** on the right: subtotal, discounts, tax and grand total.
7. Add notes if you need them. **Customer-facing notes** are for delivery instructions. **Internal notes** are for your team.
8. Click **Create Sales Order**.

The order is saved as a **Draft**. Open it from the list by double-clicking it.

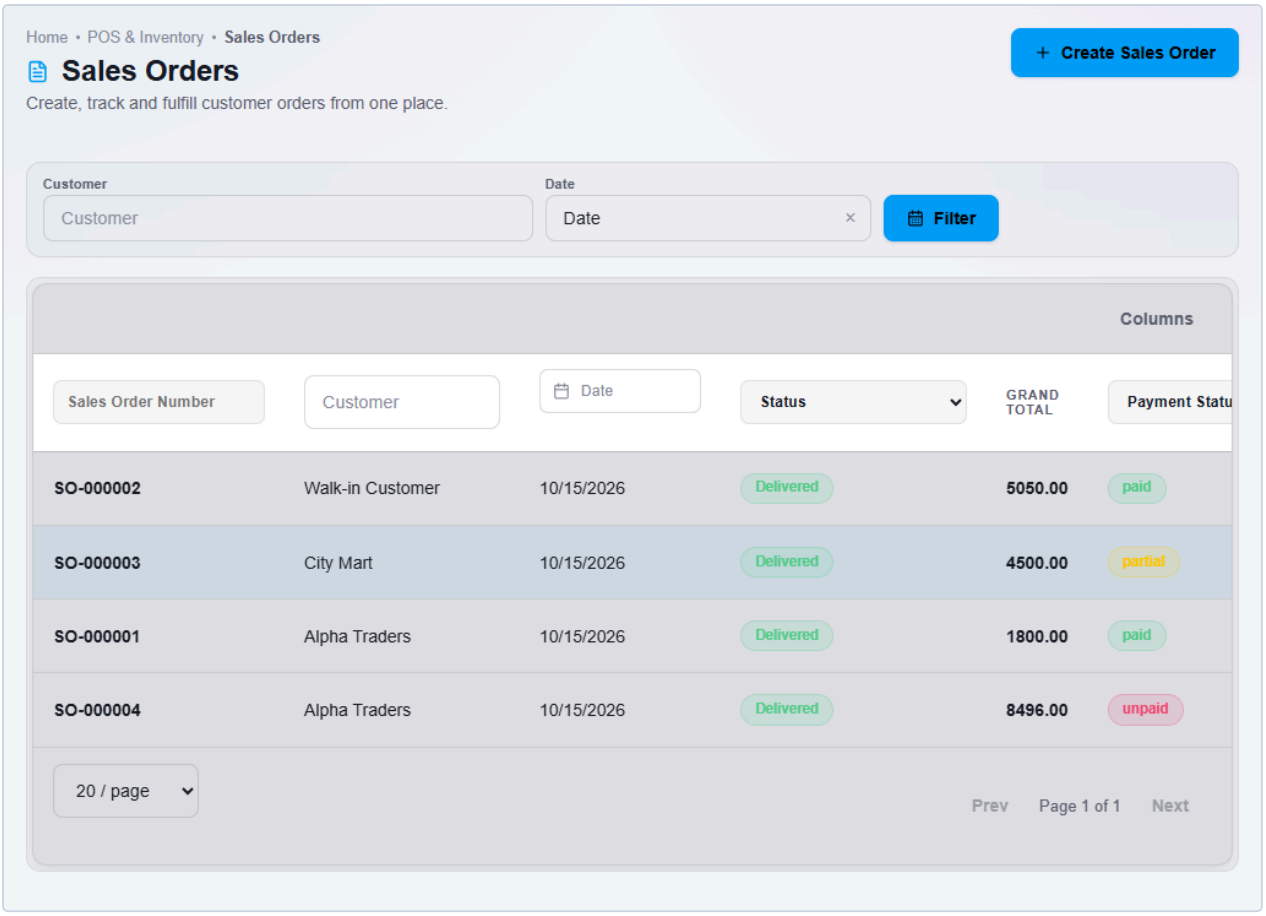


Edit (1), Fulfill Goods (2), Cancel Order (3) and the Payments tab (4).

1. Click **Confirm**. The order status becomes **Confirmed**.
2. When you hand over the goods, click **Fulfill Goods**. See Deliver an order.

What happens next

After delivery the order shows **Delivered** and an invoice is created automatically. The amount the customer owes is added to their balance. To record the customer's payment, see Receive a customer payment.



All sales orders with their status and payment status.

Important notes

- Confirm the order before you deliver it.
- On the order page, the **Collect Payment** button is not available yet. Record payments with a receipt voucher instead.
- After goods are delivered, the order page offers **Return Goods** if the customer sends something back.

Related guides

- Deliver an order
- Receive a customer payment
- Credit and part payments

Deliver an order

Record that goods have gone to the customer so stock goes down and the invoice is created.

Plan: Starter and above

What this does

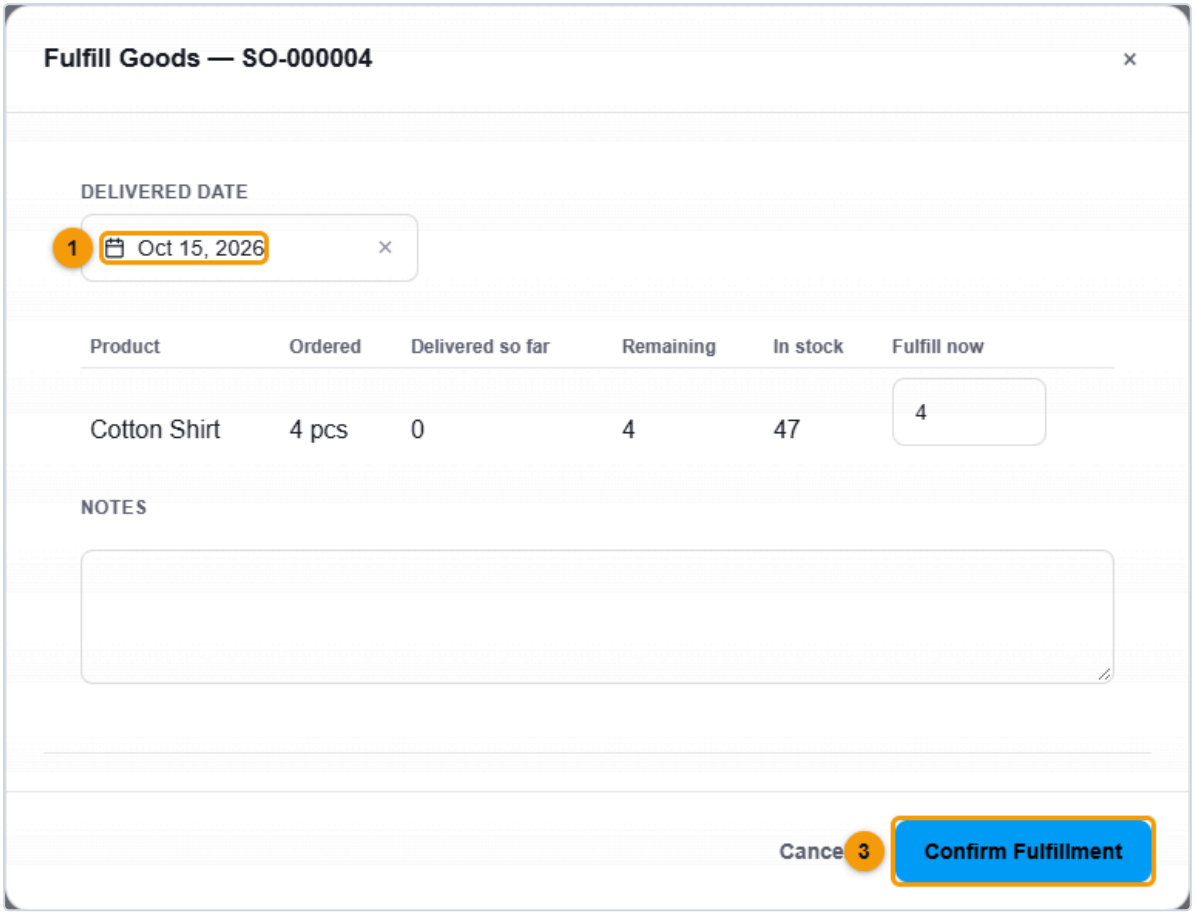
Fulfilling a sales order records that the goods have left your warehouse. NEXTOREx reduces your stock and creates the invoice.

Before you start

- The sales order must be **Confirmed**. See Sales orders.

Steps

1. Open **Customer**, then **Sales Order**, and double-click the order.
2. Click **Fulfill Goods**. The **Fulfill Goods** window opens.



Delivered date (1), quantity to fulfil (2) and Confirm Fulfillment (3).

3. Check the **Delivered date** (1).
4. For each product, the table shows **Ordered**, **Delivered so far**, **Remaining** and **In stock**. Check the **Fulfill now** quantity (2).
5. Add a note if you need one.

6. Click **Confirm Fulfillment** (3).

What happens next

- The order status becomes **Delivered**.
- Your stock goes down.
- An invoice is created and linked from the order, for example *Invoice: INV-2026-0004*.
- The **Deliveries** tab keeps a history of each delivery.

The order now says how much is still to collect. To record payment, see Receive a customer payment.

Related guides

- Sales orders
- Stock movements

Sales returns

Take goods back from a customer, put them back into stock and credit the customer's balance.

Plan: Starter and above

What this does

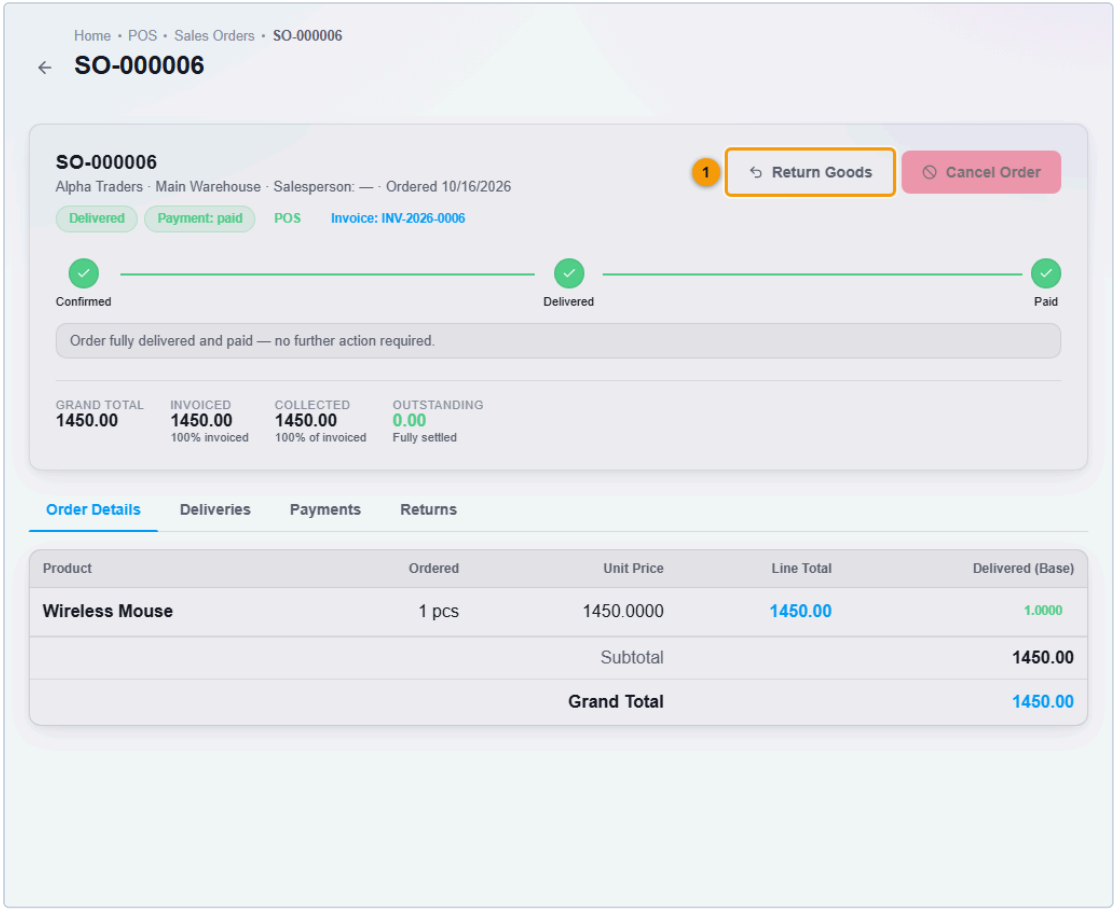
A sales return takes goods back from a customer. The returned quantity goes back into the warehouse you choose, and the value of the goods is credited to the customer's balance.

Before you start

- The sale must exist as a **sales order**. POS Checkout sales appear in **Sales Orders** too, so you can return them the same way.
- The Return Goods window shows how much of each product can still be returned.

Steps

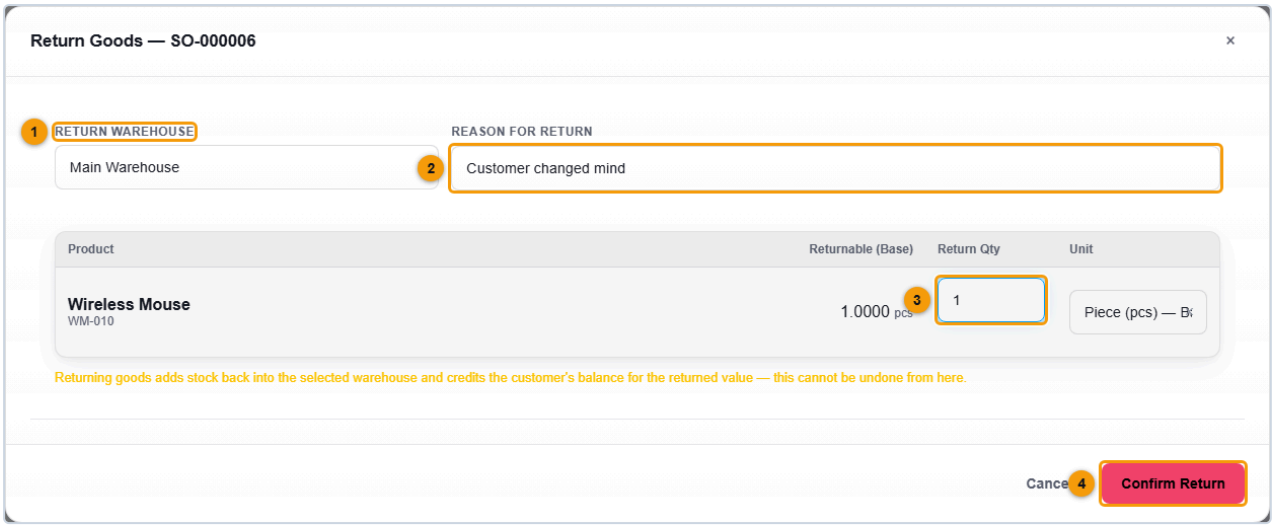
1. Open **Customer**, then **Sales Orders**, and open the order (for example **SO-000006**).
2. Click **Return Goods** (1).



Return Goods (1).

3. In the **Return Goods** window, check the **Return warehouse** (1). Stock goes back into this warehouse.
4. Type the **Reason for return** (2), for example *Customer changed mind*.

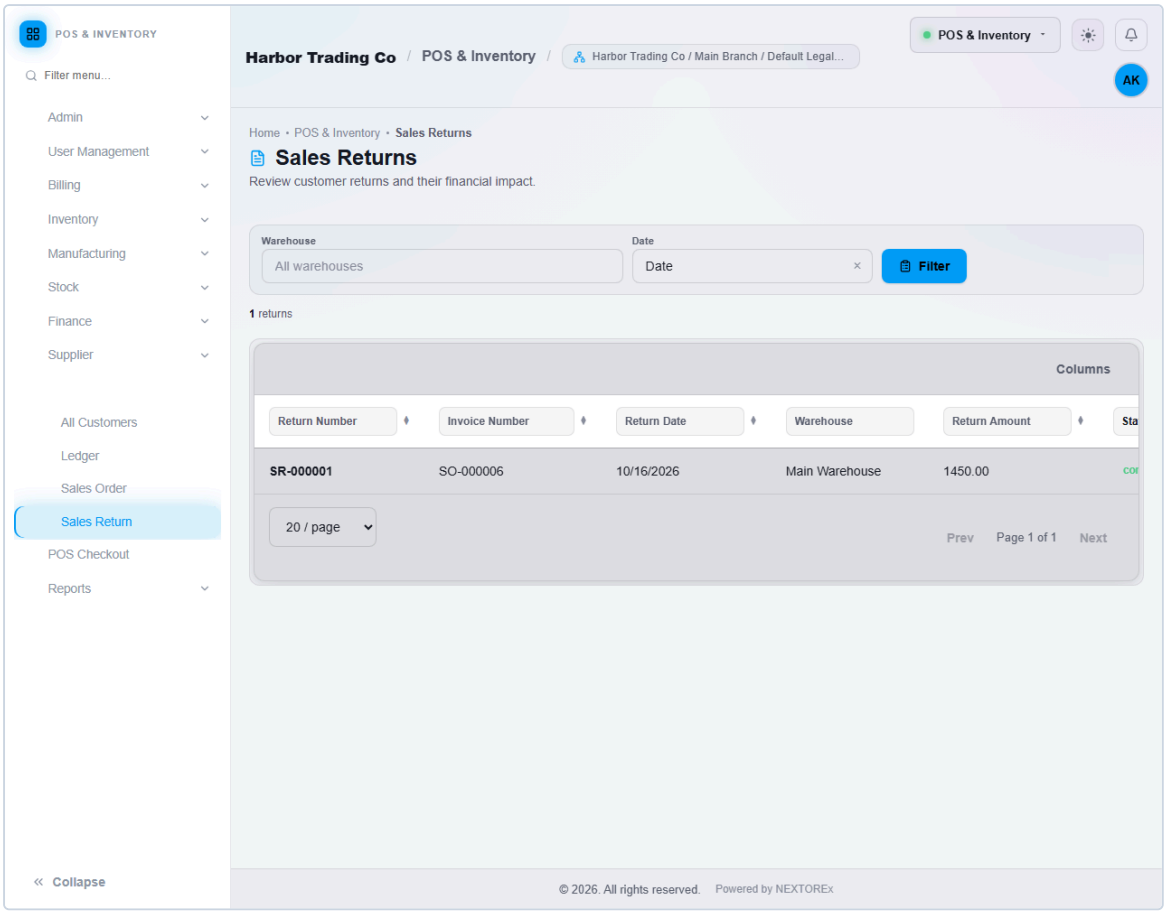
5. Enter the **Return Qty** (3) for each product the customer is returning. You cannot return more than the **Returnable** quantity.
6. Click **Confirm Return** (4).



Return warehouse (1), reason (2), return quantity (3) and Confirm Return (4).

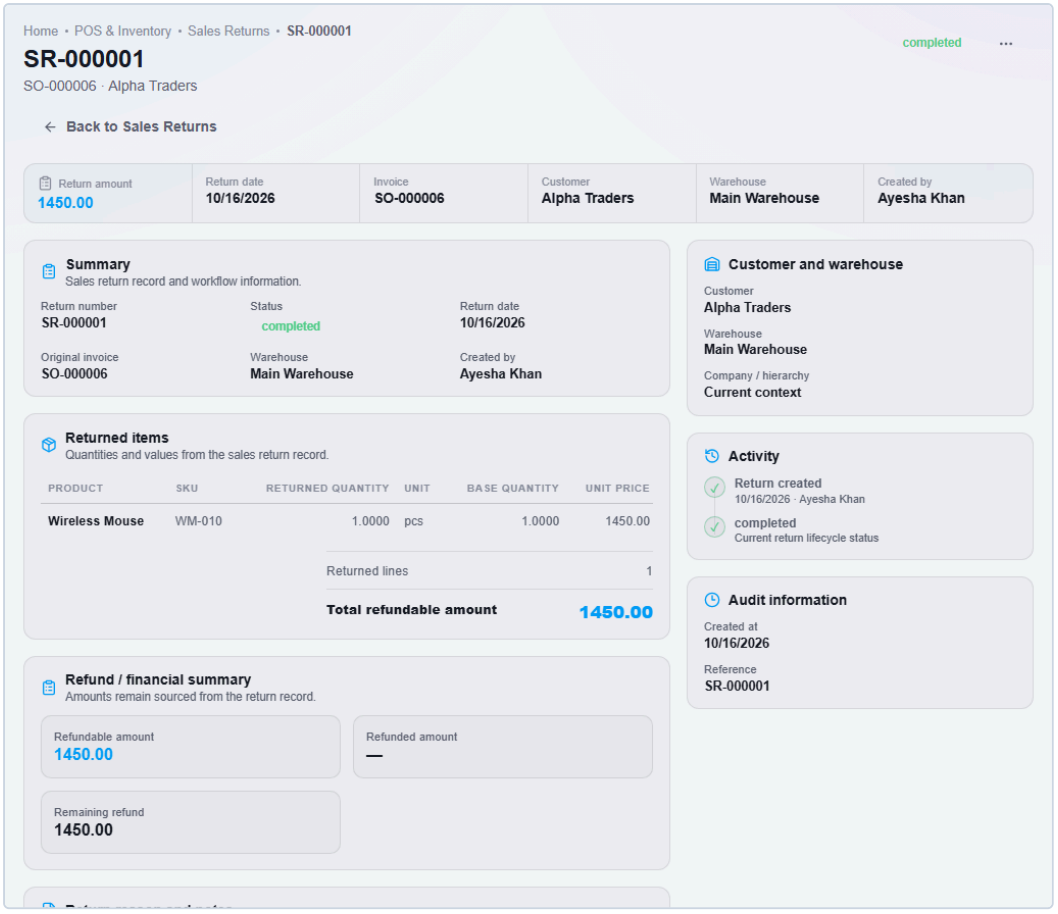
What happens next

- A return such as **SR-000001** is created with the status **completed**. Open **Sales Returns** to see all returns.



Each return, the order it belongs to, the amount and the status.

- The returned quantity is added back to **Stock Levels** in the return warehouse.
- The customer's balance is credited for the returned value. You can see it in the **Customer Ledger**.
- Open the return to see the returned items, the reason and the activity.



The returned items, the reason and the refund summary.

Important notes

- You cannot undo a return from the return window. Check the quantity before you confirm.
- The credit stays on the customer's balance. NEXTOREx does not pay cash back from the return screen.

Related guides

- Sales orders
- Customers
- Stock levels

POS settings and receipts

Set the default customer, account and payment type for POS Checkout, and print receipts for your customers.

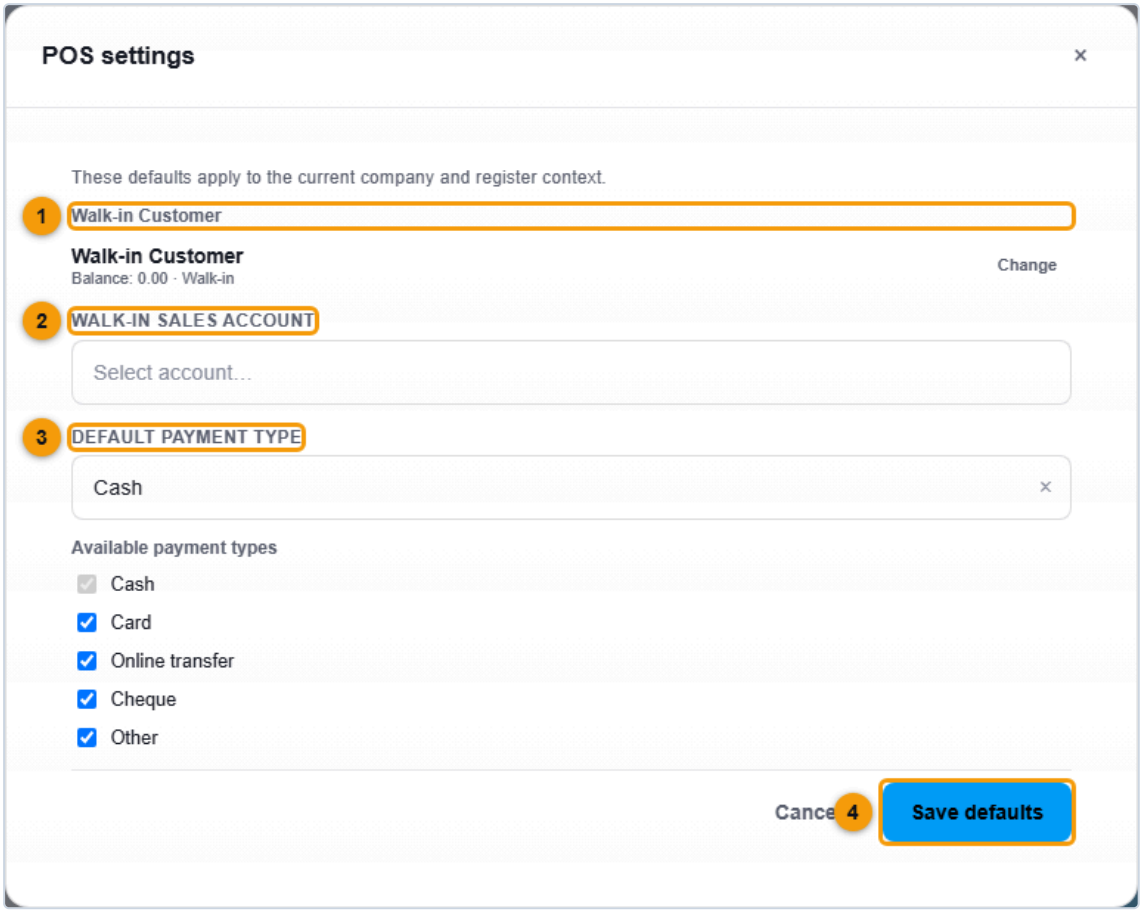
Plan: Starter and above

What this does

POS **Settings** sets the starting choices of the checkout screen so your cashier does not repeat them on every sale. Receipts are printed from your browser in a narrow format made for a receipt printer.

Change the POS defaults

1. Open **POS Checkout**.
2. Click **Settings** at the top right.



Walk-in customer (1), walk-in sales account (2), default payment type (3) and Save defaults (4).

3. Choose the **Walk-in Customer** (1) used when no customer is picked.
4. Choose the **Walk-in sales account** (2) that receives the money.
5. Choose the **Default payment type** (3), and the payment types that are available at checkout: **Cash**, **Card**, **Online transfer**, **Cheque** and **Other**.
6. Click **Save defaults** (4).

The defaults apply to the current company. Your cashier can still change the customer, payment type and account on any sale.

Print a receipt

When a sale is complete, your browser opens its print window with the receipt. Choose your printer and click **Print**. Click **Print Receipt** on the **Sale Complete** screen to print it again.



HARBOR TRADING CO

Sales Receipt

Receipt #	SO-000011
Date	10/16/2026
Time	12:00 AM
Cashier	Ayesha Khan
Customer	Walk-in Customer
Cotton Shirt	
1 x 1800.00	1800.00
Subtotal	1800.00
TOTAL	1800.00
Payment	Cash
Paid	1800.00

Thank you for shopping with us!

Powered by Harbor Trading Co

The receipt is laid out for an 80 mm receipt printer.

The receipt shows your company name, the receipt number, the date, the cashier, the customer, each item with its quantity and price, the subtotal, any discount or tax, the total, the payment type and the amount paid. For a part payment it also shows the **Balance due**.

Important notes

- The receipt is printed by your browser. Use the printer's own settings in the print window for paper size and copies.
- If a customer hands over more cash than the total, the receipt shows the amount paid, which is the sale total. The **Change due** is shown on the checkout screen, not on the receipt.

Related guides

- Make a sale at the POS
- Credit and part payments

Inventory

Products, stock, warehouses and adjustments

Add a product

Create a product with its code, unit, category and prices so you can sell and track it.

Plan: Starter and above

What this does

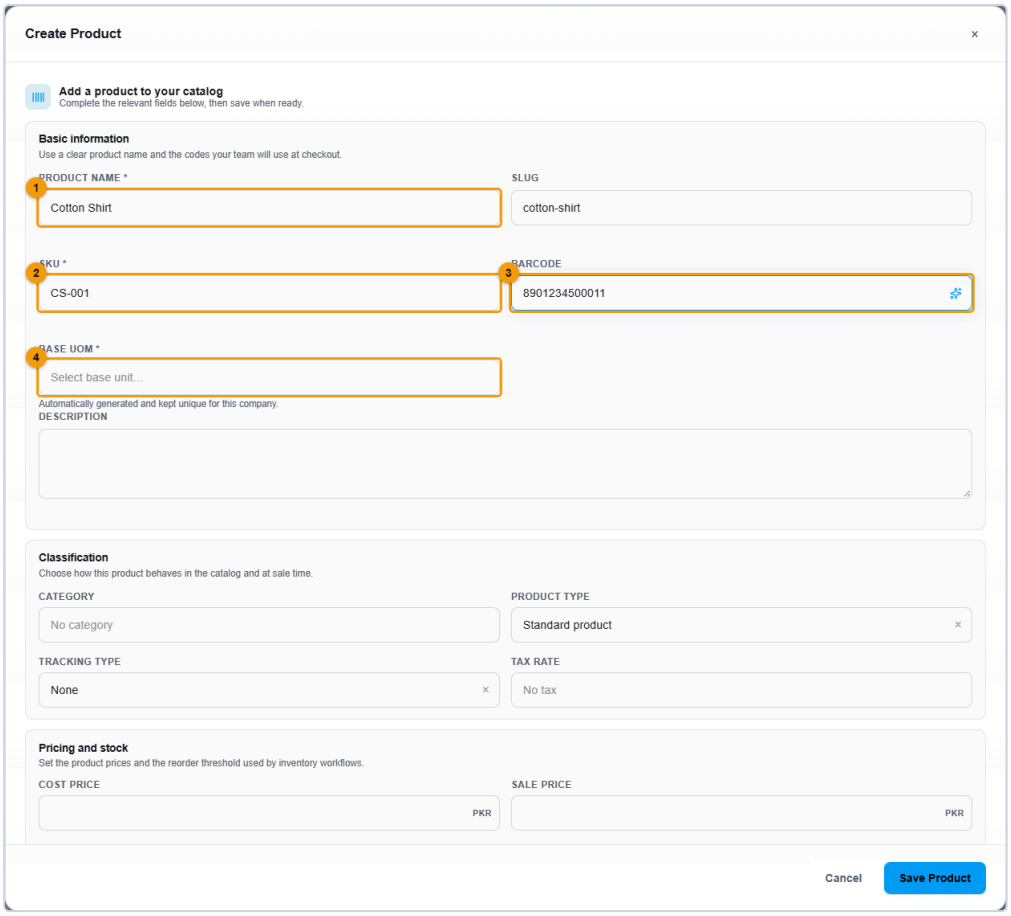
A product is anything you sell, buy or stock. Once a product exists you can sell it at the POS, order it from a supplier and see how much of it you have.

Before you start

- Create a **warehouse** if you have not yet. See Warehouses.
- Optional: create a **category** first so you can pick it. See Categories.

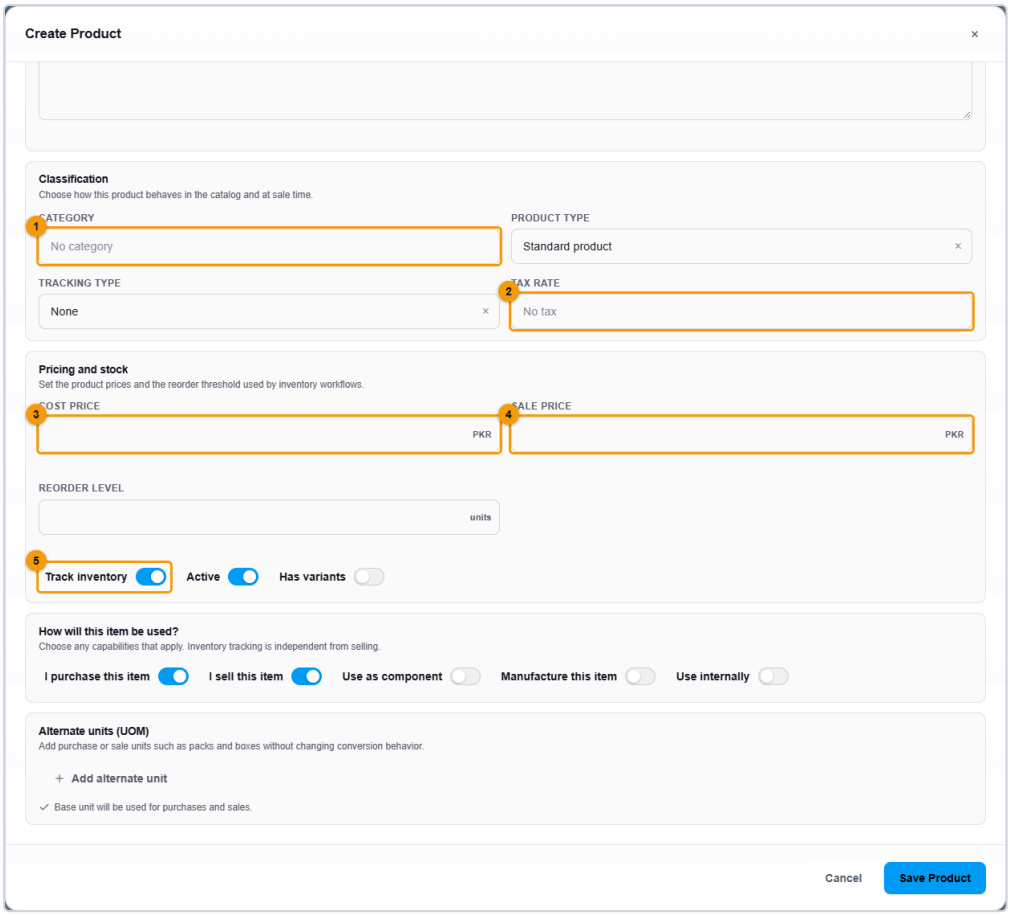
Steps

1. In the left menu, open **Inventory**, then **Product**.
2. Click **Add Product**. The **Create Product** window opens.



Basic information. Numbers match the steps below.

3. Enter the **Product name** (1) and a **SKU** (2). The SKU is your own short code, for example CS-001.
4. Add a **Barcode** (3) if the product has one. Type or scan it, or click the small sparkle button inside the box to have NEXTOREx create one.
5. Choose the **Base UOM** (4). This is the smallest unit you count the product in, such as Piece or Kilogram.
6. Scroll down. Choose a **Category** (1) and, if the product is taxed, a **Tax rate** (2).

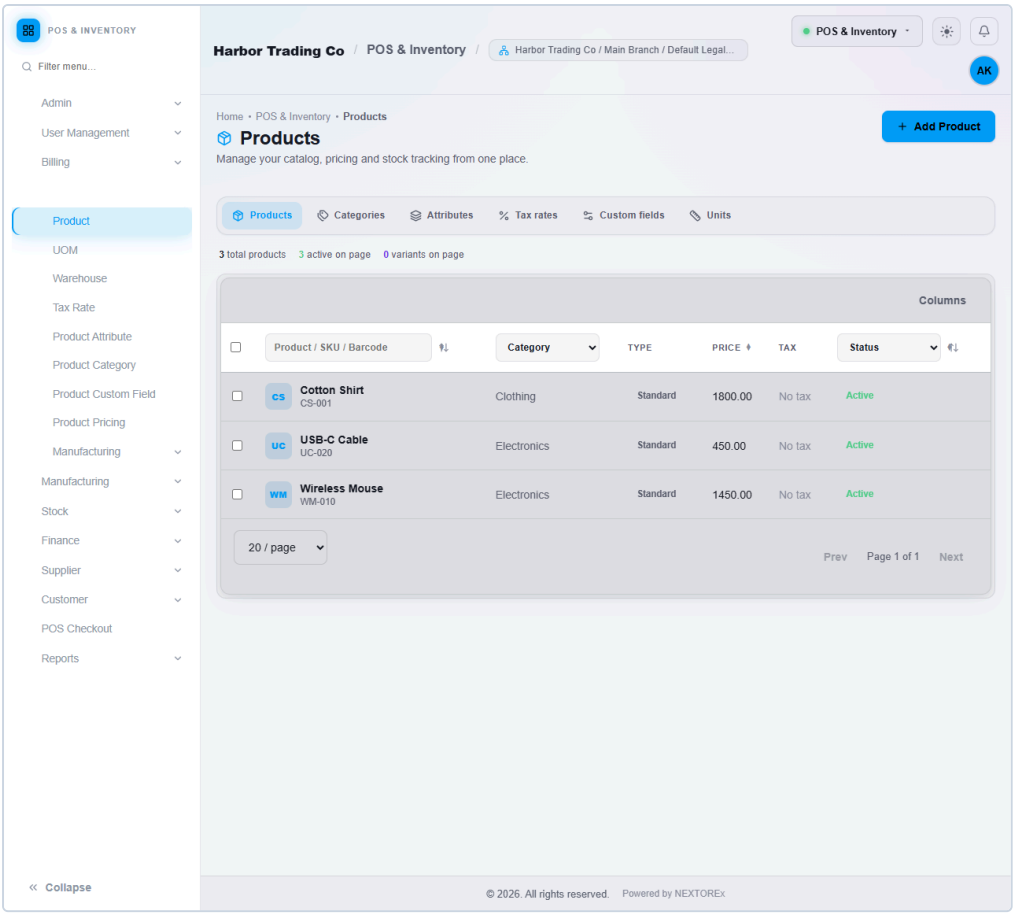


Classification, prices and options.

7. Enter the **Cost price** (3), what you pay, and the **Sale price** (4), what you charge.
8. Leave **Track inventory** (5) switched on so NEXTOREx counts your stock for this product.
9. Under **How will this item be used?** switch on **I purchase this item** and **I sell this item** as needed.
10. Click **Save Product**.

What happens next

The product appears in the **Products** list. You can now add stock to it, buy it from suppliers and sell it at the POS.



The Products list.

To change a product later, double-click it to open its page, then click **Edit**.

Important notes

- The product has no stock yet. Add opening stock with a stock adjustment.
- The list column named **Tax** may not show the tax rate you picked. Open the product to see its tax rate.

Related guides

- Categories
- Stock adjustments
- Make your first sale

Categories

Group your products into categories so they are easy to find and report on.

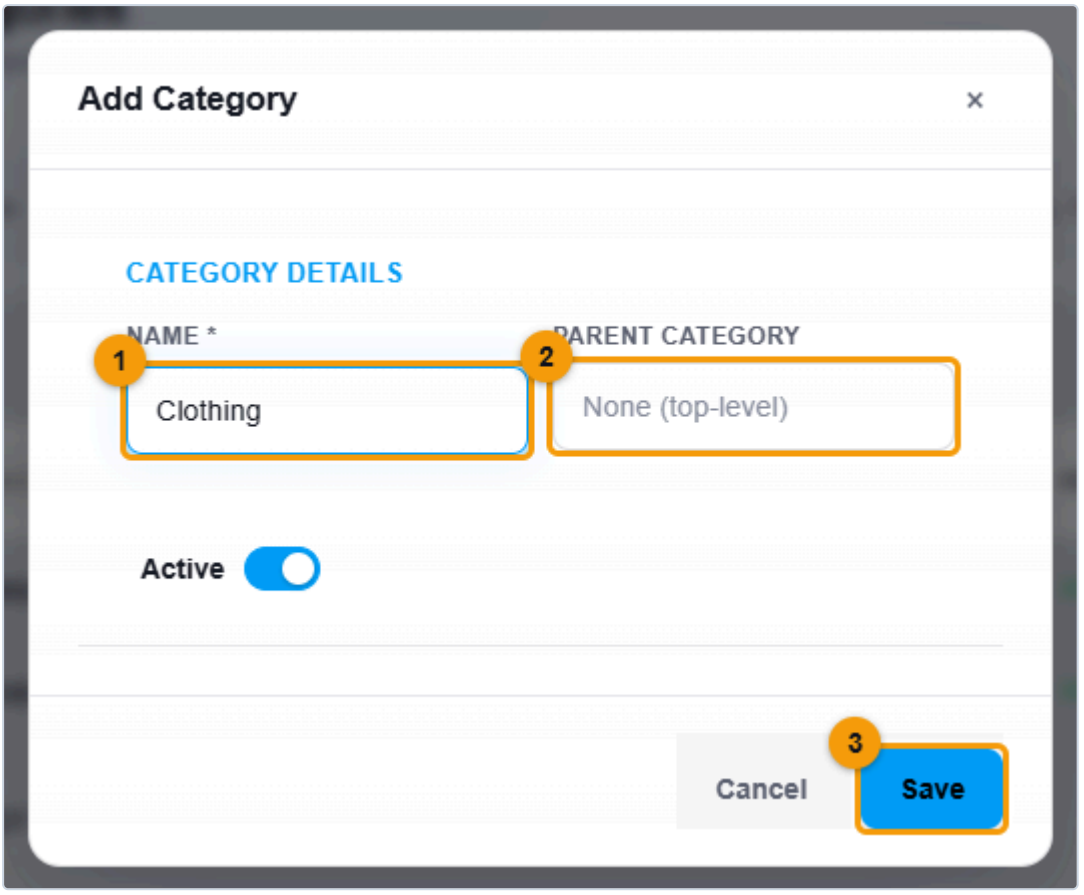
Plan: Starter and above

What this does

Categories group similar products, for example Clothing or Electronics. You can filter the product list by category.

Steps

1. Open **Inventory**, then **Product Category**. You can also open **Product** and click the **Categories** tab.
2. Click **Add Category**.

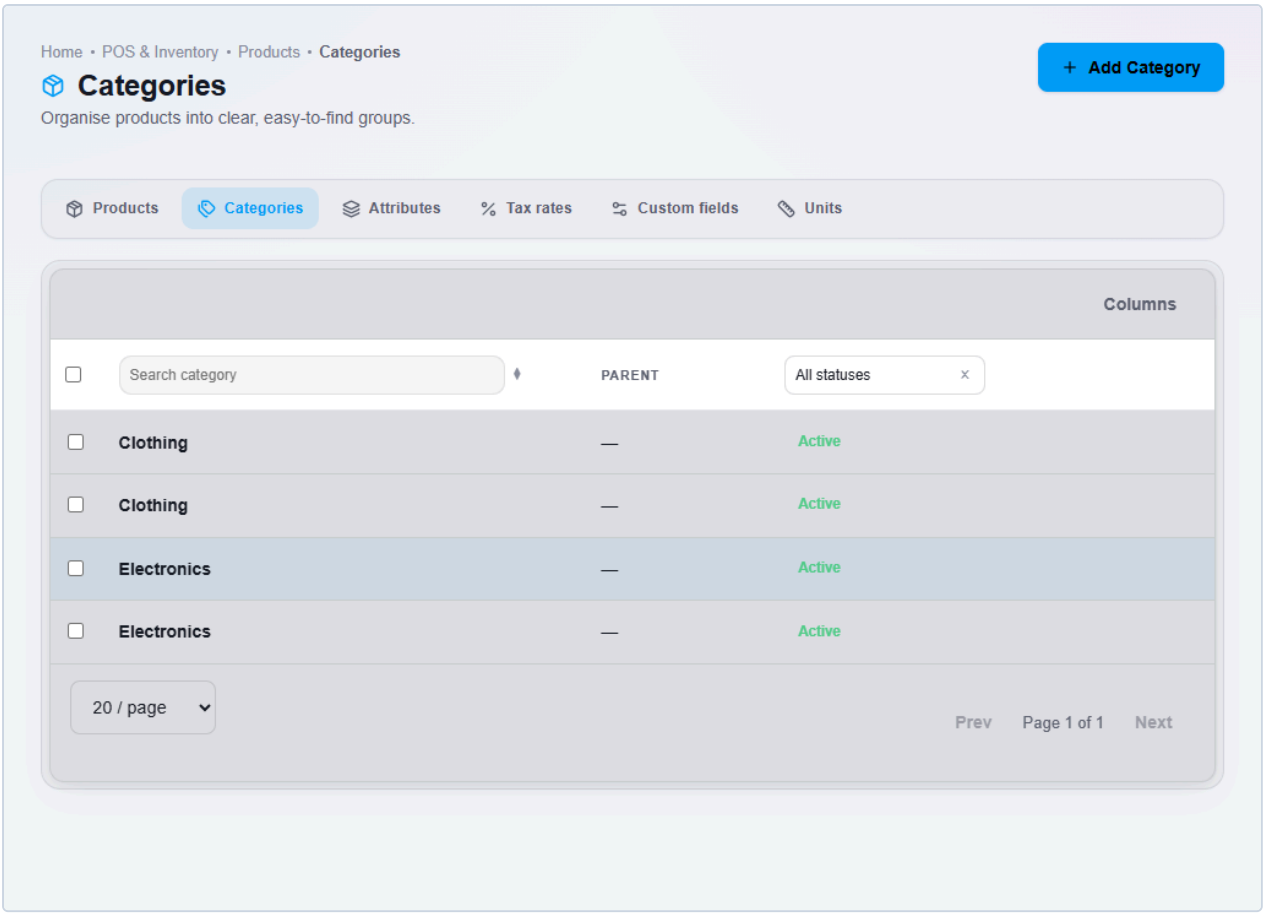


Name the category. Leave Parent category empty for a top-level group.

3. Enter the **Name** (1).
4. To place it inside another category, choose a **Parent category** (2). Leave it empty for a top-level category.
5. Click **Save** (3).

What happens next

The category is available when you add or edit a product.



The Categories list.

Related guides

- Add a product

Warehouses

Set up the places where you keep stock, such as a shop, store room or warehouse.

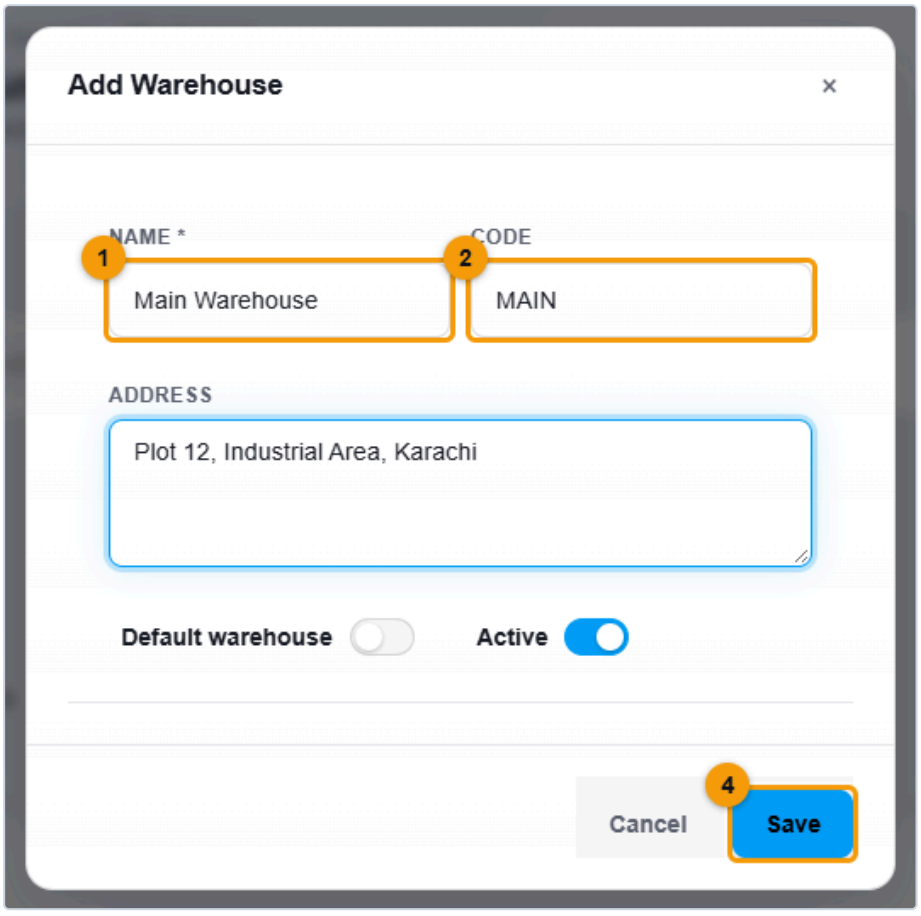
Plan: Starter and above

What this does

A warehouse is any place where you keep stock. A small shop may need only one. NEXTOREx records stock separately for each warehouse.

Steps

1. Open **Inventory**, then **Warehouse**.
2. Click **Add Warehouse**.

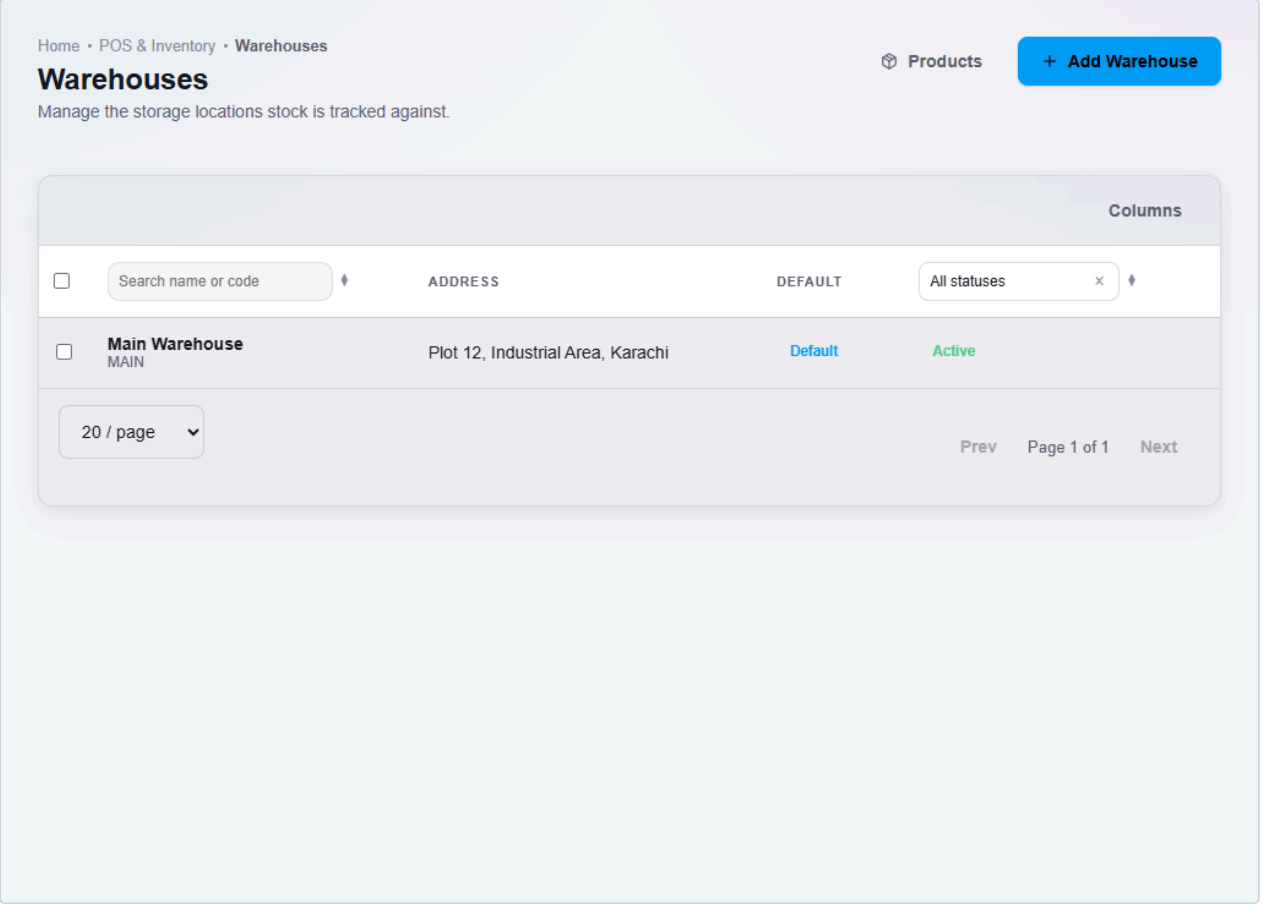


Name, code and address.

3. Enter a **Name** (1), for example Main Warehouse, and a short **Code** (2).
4. Optionally enter the **Address**.
5. Switch on **Default warehouse** (3) if this is where most sales and purchases happen. The POS uses it automatically.
6. Click **Save** (4).

What happens next

The warehouse is listed under **Warehouse**. You can choose it when you receive stock, adjust stock and sell.



The Warehouses list.

To change a warehouse, right-click it and choose **Edit**.

Important notes

- Create a warehouse before you add stock. Stock is always recorded against a warehouse.

Related guides

- Stock adjustments

Stock adjustments and opening stock

Add opening stock, or increase and decrease stock by hand, with a clear record of why.

Plan: Starter and above

What this does

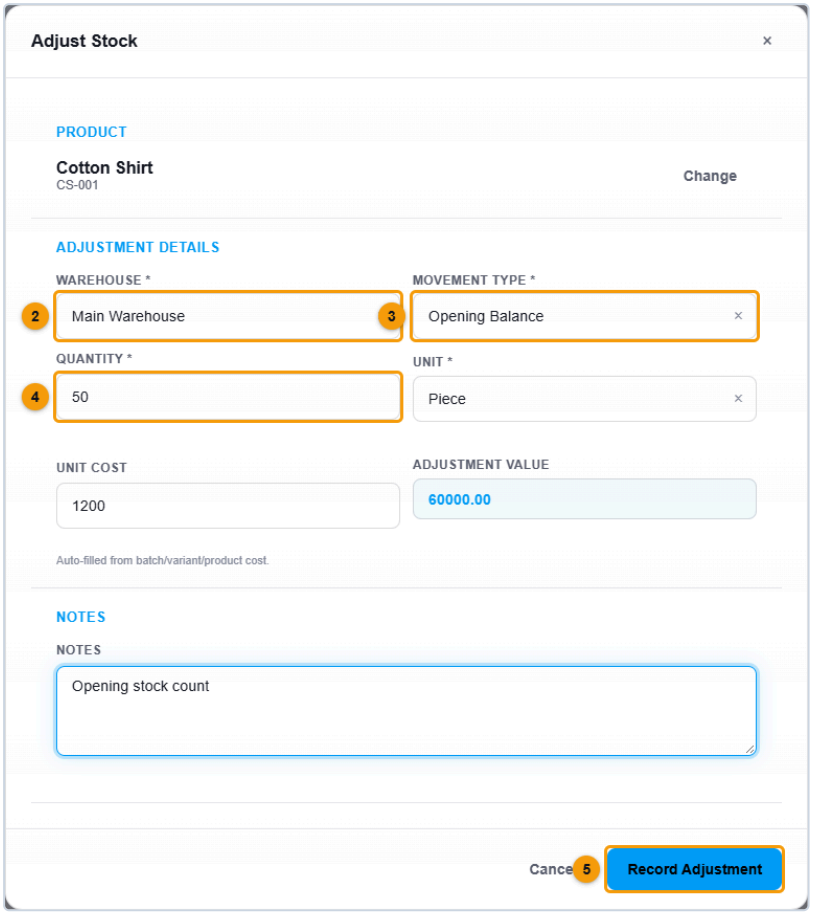
A stock adjustment changes the quantity of a product in one warehouse without a sale or purchase. Use it to enter the stock you already have when you start, or to correct the count after a stock-take.

Before you start

- Create the product and the warehouse.

Steps

1. Open **Stock**, then **Stock Adjustment**.
2. Click **Create adjustment**. The **Adjust Stock** window opens.



Product, warehouse, type and quantity.

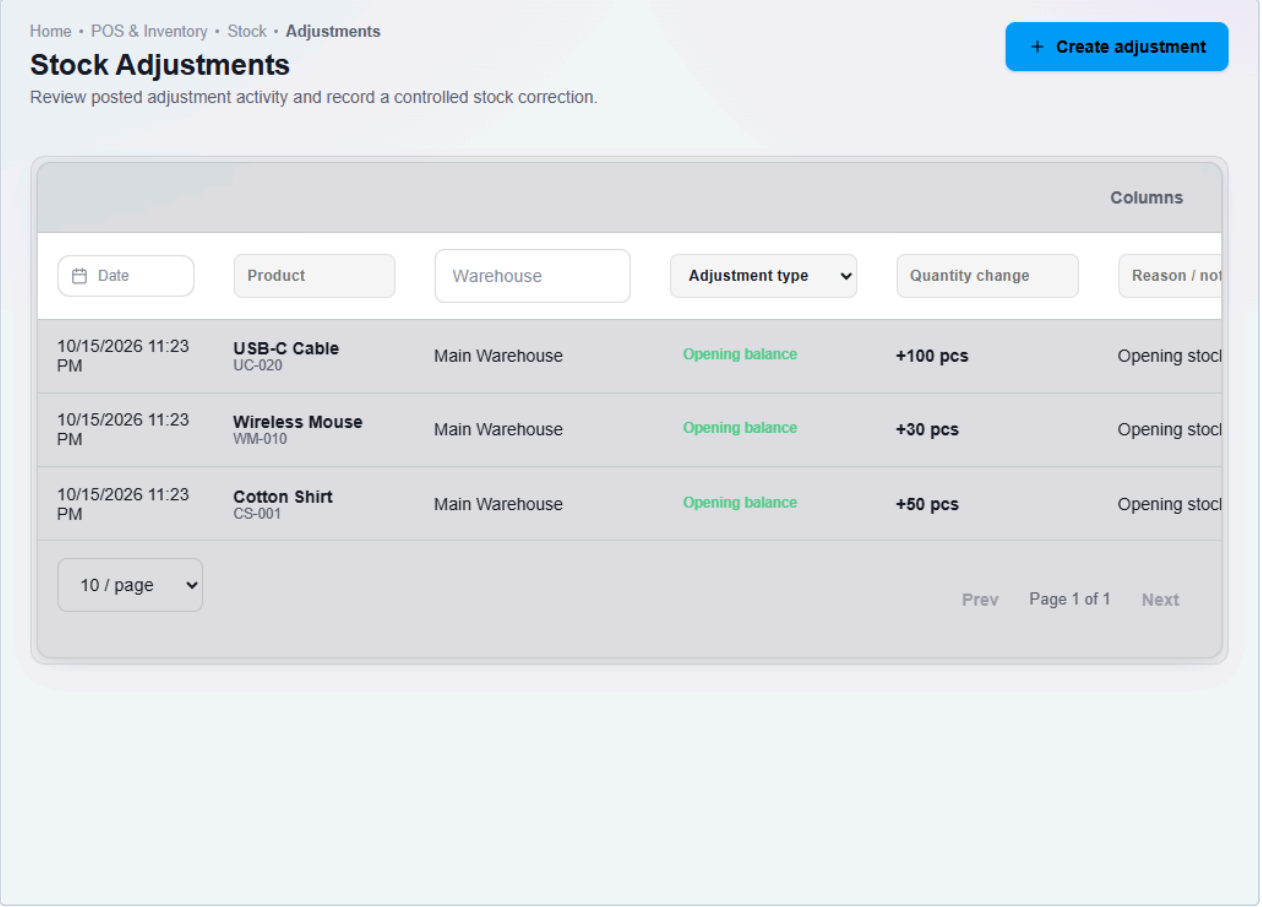
3. Under **Product**, search by name or SKU and pick the product.
4. Choose the **Warehouse** (2).
5. Choose the **Movement type** (3):
   - **Opening Balance** for the stock you already had.

- **Adjustment In** to increase stock.
- **Adjustment Out** to decrease stock.

6. Enter the **Quantity** (4). The **Unit** is filled in for you.
7. Check the **Unit cost**. It is filled in from the product and you can change it. The **Adjustment value** is worked out for you.
8. Add a note, for example *Opening stock count*.
9. Click **Record Adjustment** (5).

What happens next

The quantity changes straight away and the adjustment is listed with its date, type and who made it.



Every adjustment stays on record.

Important notes

- An **Opening Balance** is recorded as Inventory and Opening Balance Equity. It is not profit. See How opening stock is recorded.
- Adjustments are a record of what changed. To correct a mistake, record another adjustment.

Related guides

- Stock movements

Stock movements

See every change to your stock, from opening balances to sales, purchases and production.

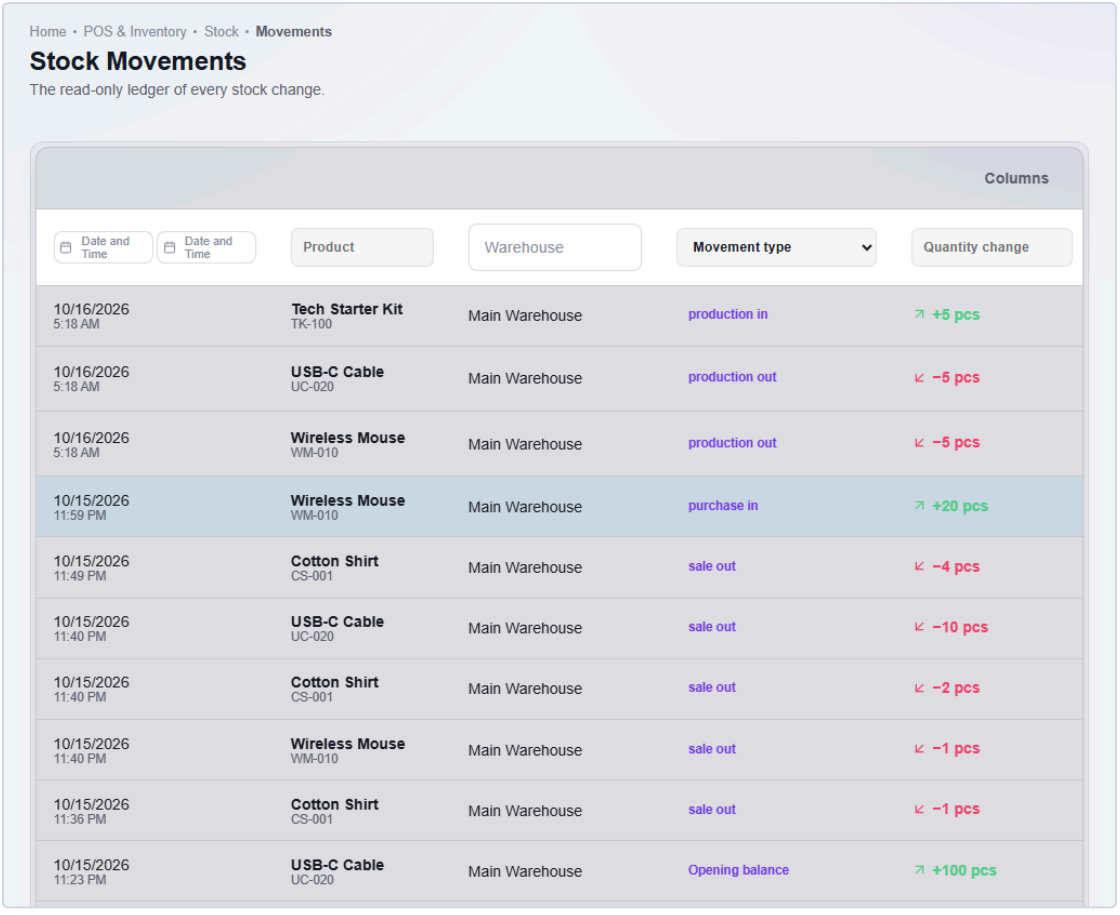
Plan: Starter and above

What this does

Stock Movements is the history of your stock. Every time a quantity changes, a line is added: an opening balance, a purchase receipt, a sale, an adjustment or a transfer. You cannot edit this list. It is there so you can see what happened and when.

Steps

1. Open **Stock**, then **Movements**.
2. Use the filters above the table to narrow the list:
   - **Date and Time**: a from and to date.
   - **Product** and **Warehouse**.
   - **Movement type**: Adjustment increase, Adjustment decrease, Opening balance, Purchase receipt, Sale, Transfer in or Transfer out.
3. Read the **Quantity change** column. A green plus means stock came in. A negative number means stock went out.



Each line is one change to one product in one warehouse.

What happens next

Nothing changes when you look at this page. To change stock, use a stock adjustment, a sale or a purchase.

Related guides

- Stock adjustments and opening stock
- Receive goods from a supplier

Stock levels

See how much of each product you have in each warehouse, and which products are out of stock.

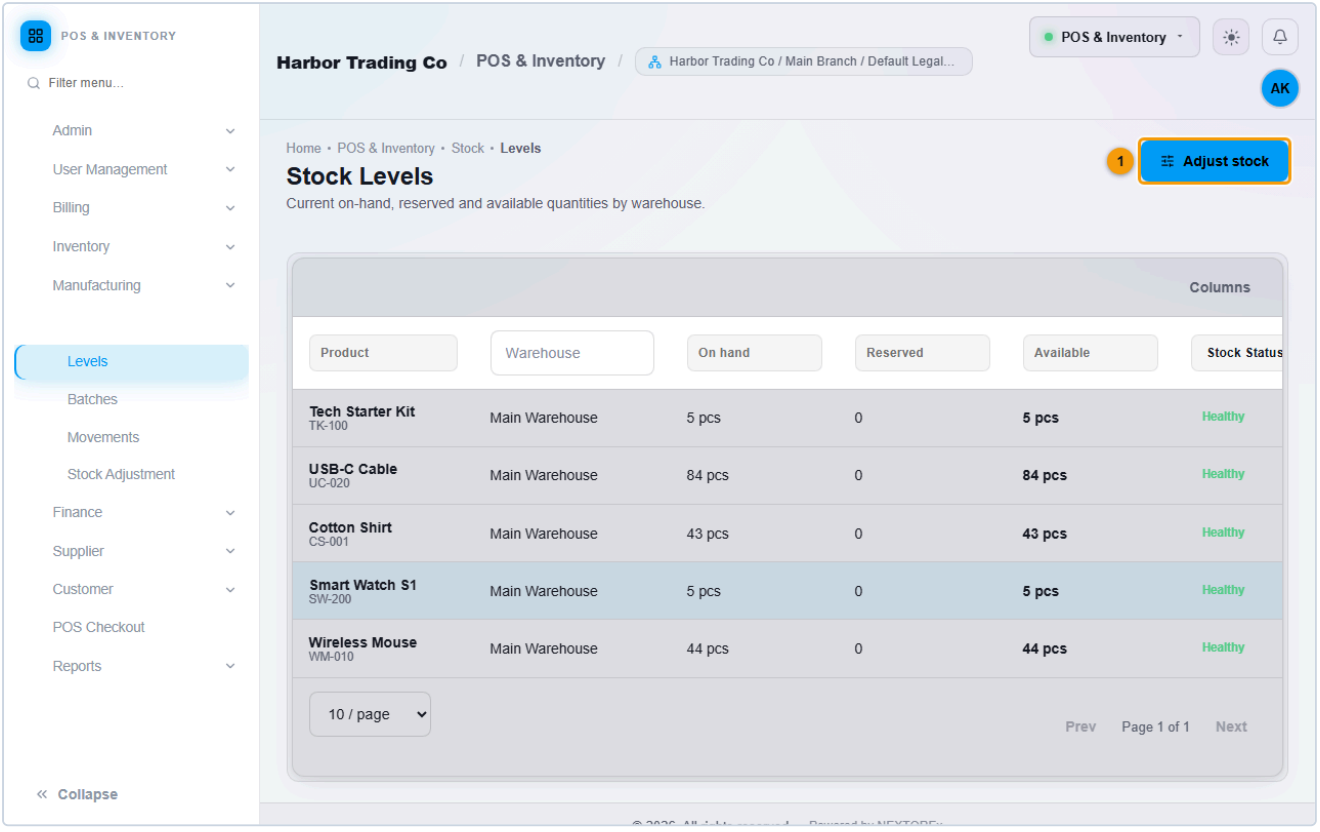
Plan: Starter and above

What this does

Stock Levels shows the quantity of each product in each warehouse: **On hand**, **Reserved** and **Available**, with a **Stock Status** of **Healthy** or **Out of stock**.

Steps

1. Open **Stock**, then **Levels**.
2. Read each row: the product and its SKU, the warehouse, and the quantities.
3. Use the filters at the top of each column to find a product or warehouse.
4. Click **Adjust stock** (1) to change a quantity. See Stock adjustments.



Adjust stock (1). Each product has one row per warehouse.

Related guides

- Stock adjustments and opening stock
- Stock movements

Tax rates

Create a sales tax rate and attach it to your products.

Plan: Starter and above

What this does

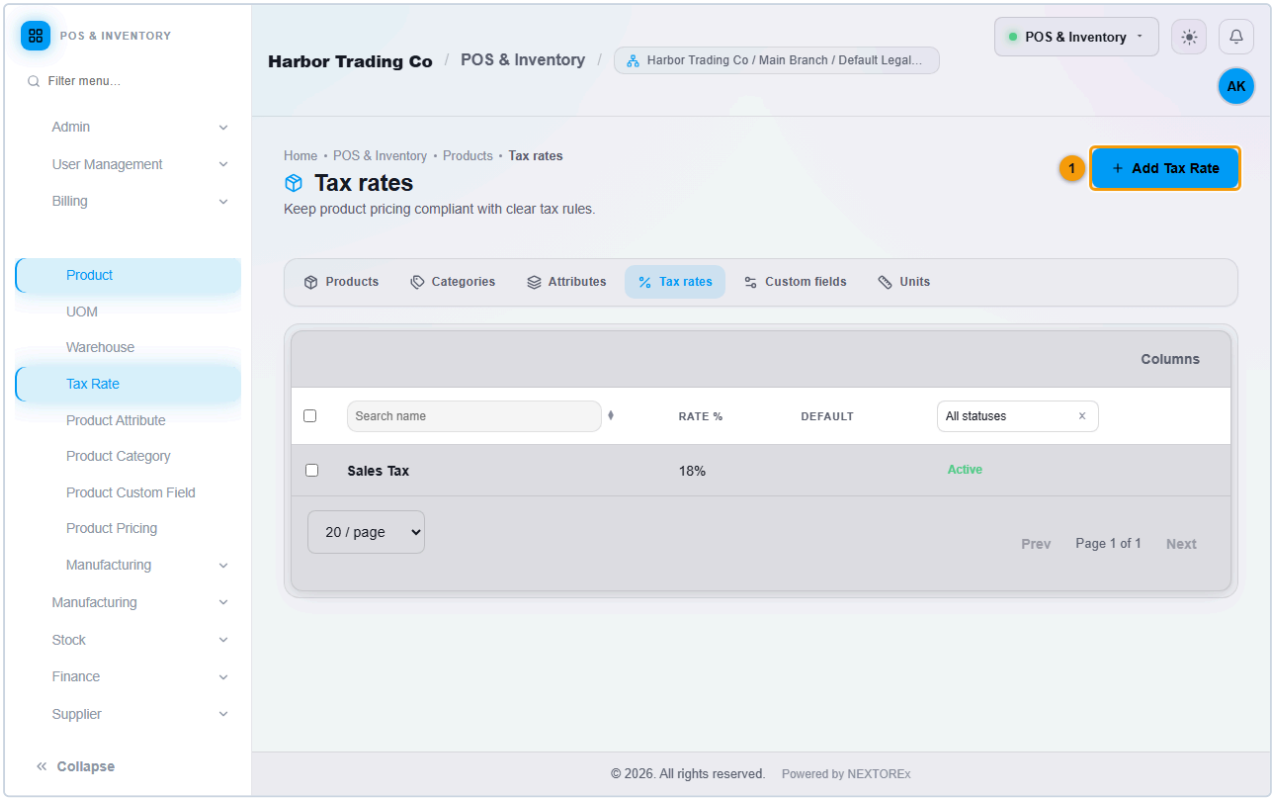
A tax rate is a named percentage, for example *Sales Tax 18%*. When you attach it to a product, sales orders for that product add the tax and show it separately from your sales.

Before you start

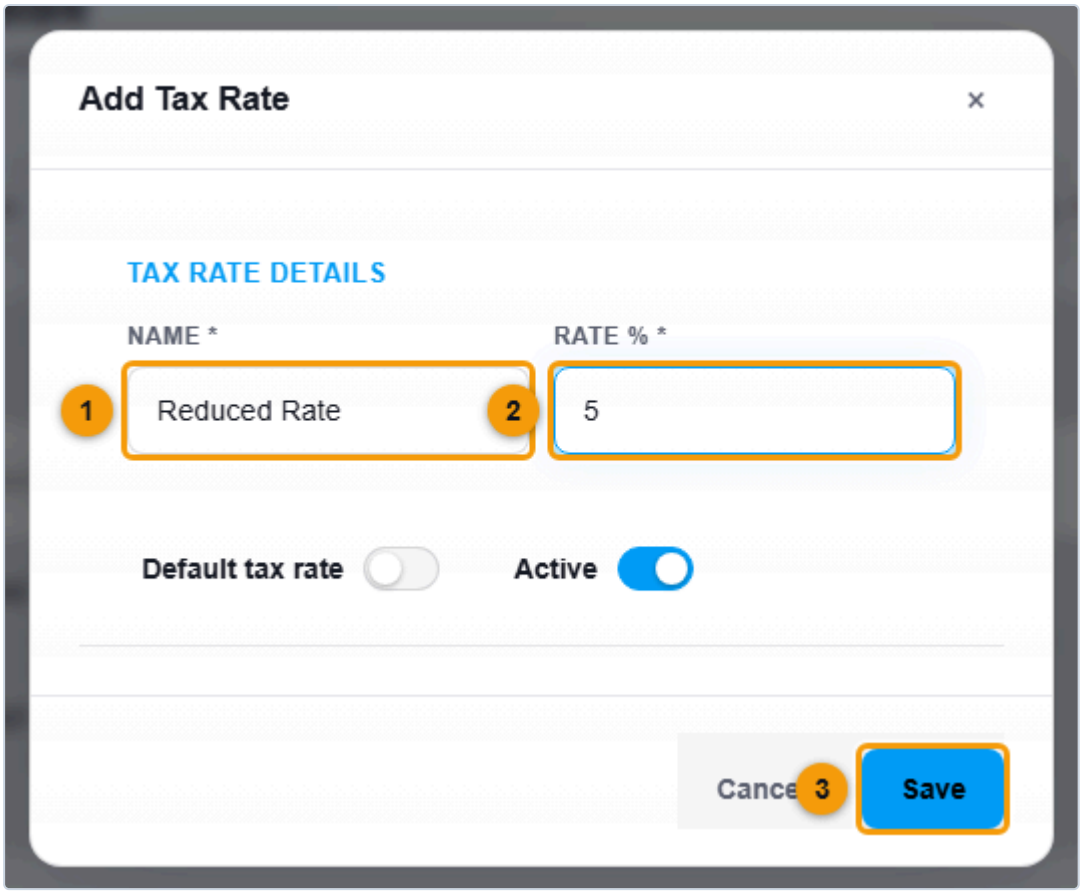
You need permission to manage inventory. Admins on plans that include Inventory have it by default.

Steps

1. Open **Inventory**, then **Tax Rate**.
2. Click **Add Tax Rate** (1).



Your tax rates. Add Tax Rate (1).



Name (1), rate (2) and Save (3).

3. Enter the **Name** (1) and the **Rate %** (2).
4. Switch on **Default tax rate** if most of your products use it.
5. Click **Save** (3).
6. Open a product, click **Edit**, choose the **Tax rate**, and click **Update Product**.

Important notes

- POS Checkout does not add tax to the cart. Sales orders do. See Sales orders.

Batches and expiry dates

Track products by batch number and expiry date, receive a batch from a supplier, and see what is left in each batch.

Plan: Starter and above

What this does

Use batch tracking for products that come in lots and may expire, such as food, medicine or cosmetics. Each time goods arrive you record a **Batch number** and, if you wish, a manufacture date and an expiry date. The **Batches** page then shows how much of each batch is left and how soon it expires.

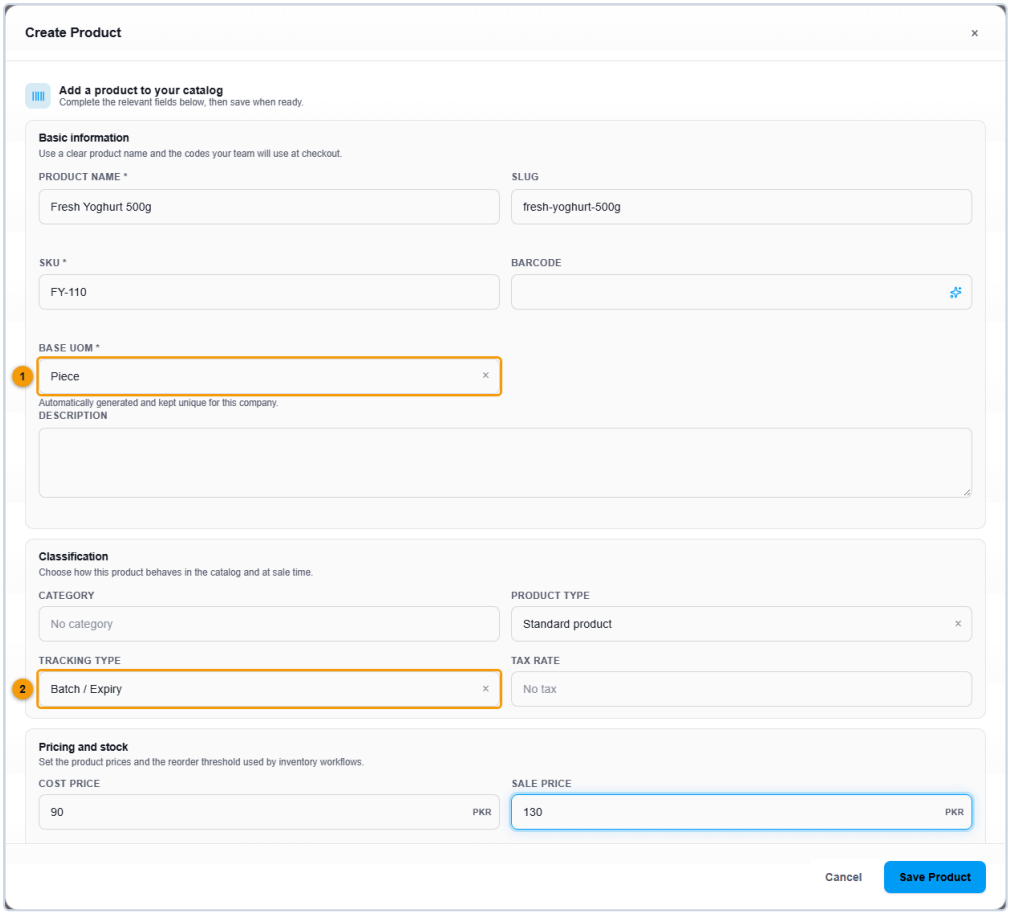
Before you start

- You need a supplier, a warehouse and a purchase order that has been marked as ordered. See Purchase orders.

Steps

1. Set up the product

1. Open **Inventory**, then **Product**, and click **Add Product**.
2. Choose **Batch / Expiry** in **Tracking type** (2).

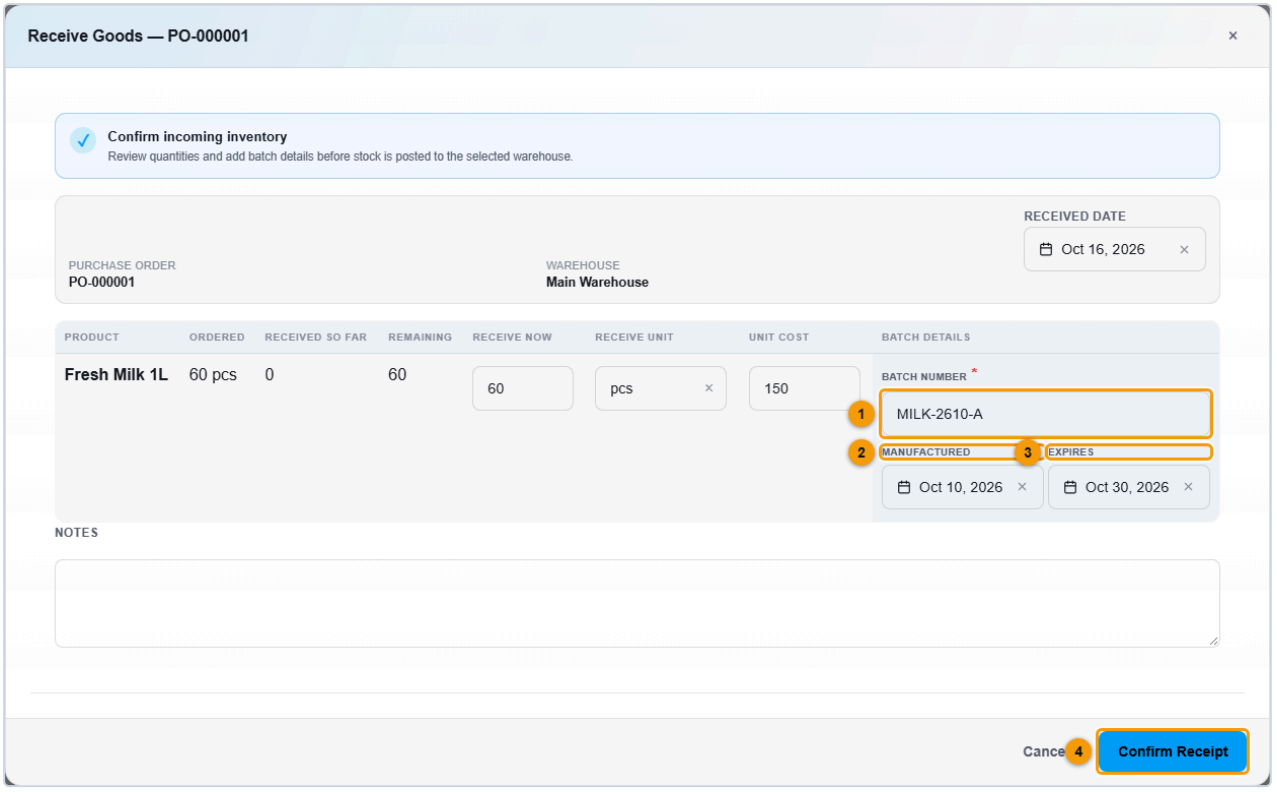


Base UOM (1) and Tracking type (2).

3. Fill in the other details and click **Save Product**.

2. Receive the batch

1. Open the purchase order and click **Receive goods**. See Receive goods from a supplier.
2. In **Batch details**, type the **Batch number** (1). It is required for a batch tracked product.
3. Optionally choose the **Manufactured** (2) and **Expires** (3) dates.

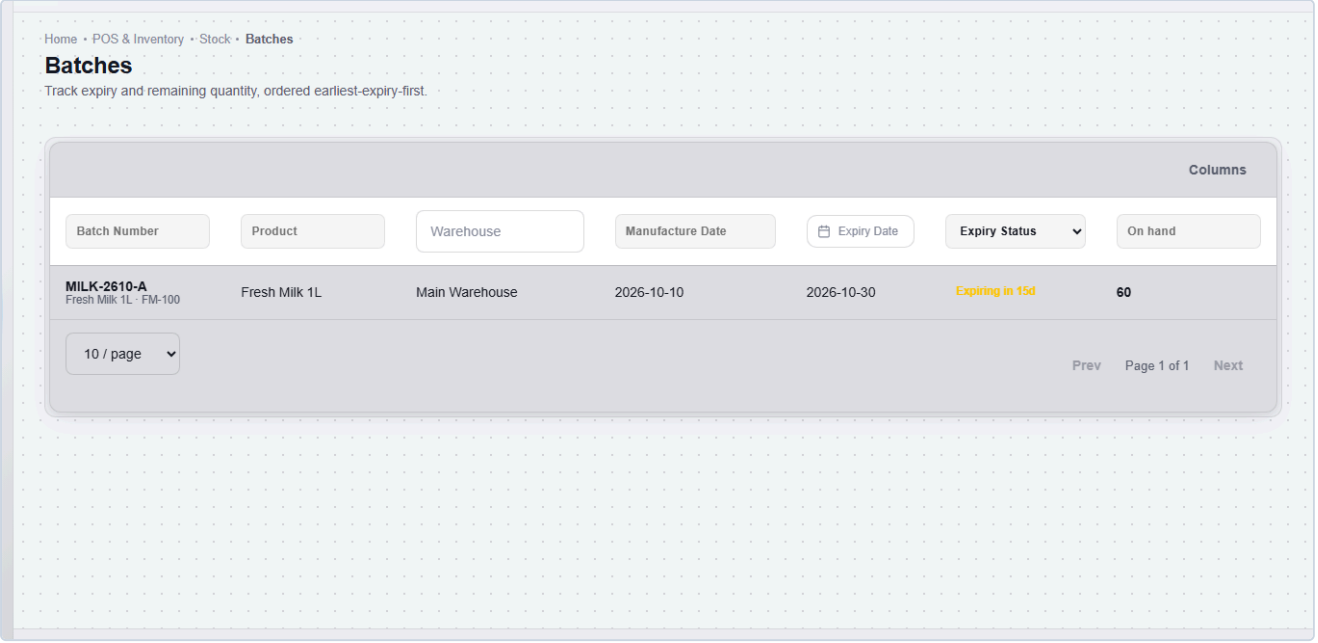


Batch number (1), Manufactured (2), Expires (3) and Confirm Receipt (4).

4. Click **Confirm Receipt** (4).

3. Check the batch

Open **Stock**, then **Batches**. Each row shows the batch number, product, warehouse, manufacture and expiry dates, the **Expiry Status** and the quantity **On hand**.



One row per batch. Expiry Status shows how long is left.

Use the filters at the top of each column to find a batch. **Expiry Status** can be set to **Valid**, **Expired** or **No expiry date**.

What happens next

- The batch is created in the order's warehouse with the quantity you received. The same quantity is added to Stock levels and appears in Stock movements.
- If you receive more of the same batch number into the same warehouse later, the existing batch quantity goes up. It does not create a second row.
- The purchase order shows the goods as received, as for any other product.

Important notes

- If a batch number is missing, NEXTOREx does not receive the goods. Nothing is saved, and you can correct the line and try again.
- Batches are listed with the earliest expiry first.

Related guides

- Receive goods from a supplier
- Stock levels
- Serial numbers and bundles

Units of measure

See the units NEXTOREx counts your products in, and add your own.

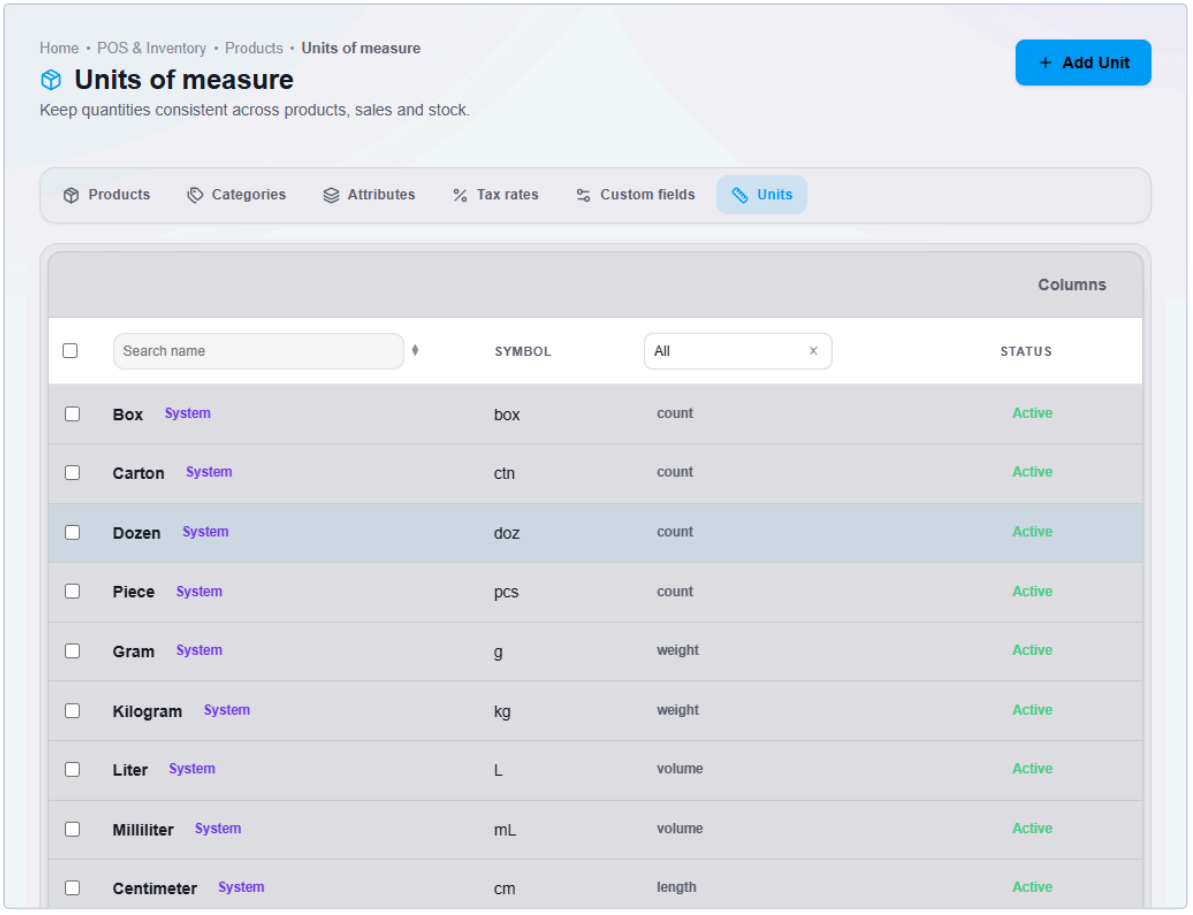
Plan: Starter and above

What this does

A unit of measure (UOM) is how you count a product: pieces, kilograms, litres, metres and so on. Every product has a **Base UOM**. Common units such as Piece, Box, Carton, Dozen, Kilogram, Gram, Litre and Metre are already there.

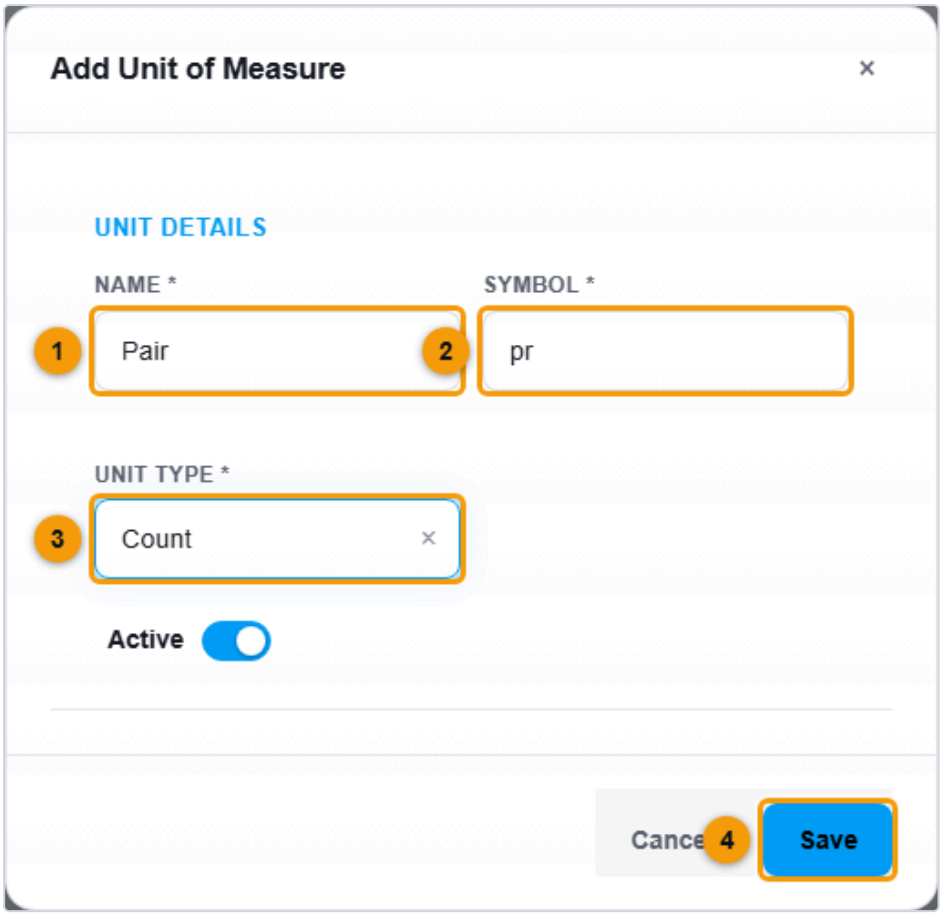
Steps

1. Open **Inventory**, then **UOM**.
2. Look through the list. Each unit has a name, a symbol and a status.



The units available when you add a product.

3. To add a unit, click **Add Unit**.



Name (1), symbol (2), unit type (3) and Save (4).

4. Enter the **Name** (1), for example *Pair*, and the **Symbol** (2), for example *pr*.
5. Choose the **Unit type** (3): **Count**, **Weight**, **Volume** or **Length**.
6. Click **Save** (4).

What happens next

The new unit can be chosen as the **Base UOM** when you add a product.

Related guides

- Add a product

Serial numbers and bundles

What the Tracking type Serial Number and the Bundle / Combo product type do today, and what they do not do yet.

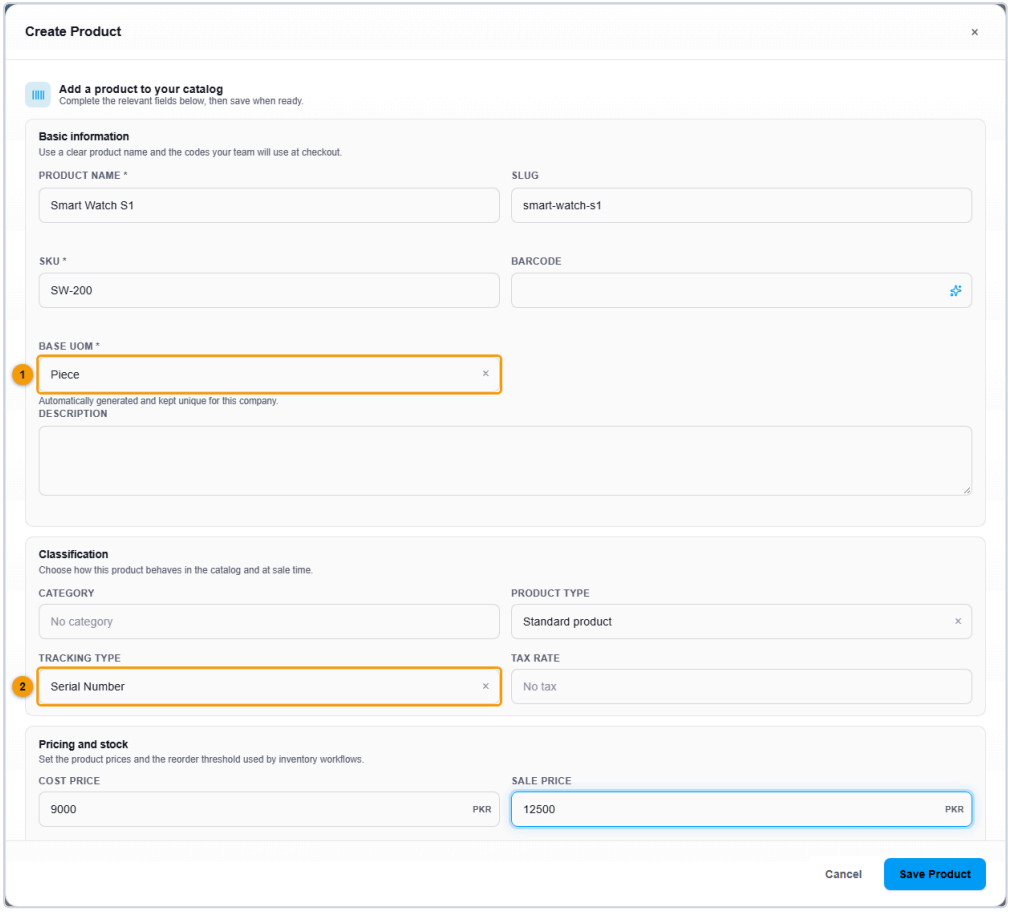
Plan: Starter and above

What this does

Two product settings sit on the **Create Product** window: **Tracking type** and **Product type**. They label a product as *serial tracked* or as a *bundle*. This guide explains exactly what each one does in the product today, so you can decide whether to use it.

Serial tracked products

1. Open **Inventory**, then **Product**, and click **Add Product**.
2. Choose **Serial Number** in **Tracking type** (2).



Base UOM (1) and Tracking type (2).

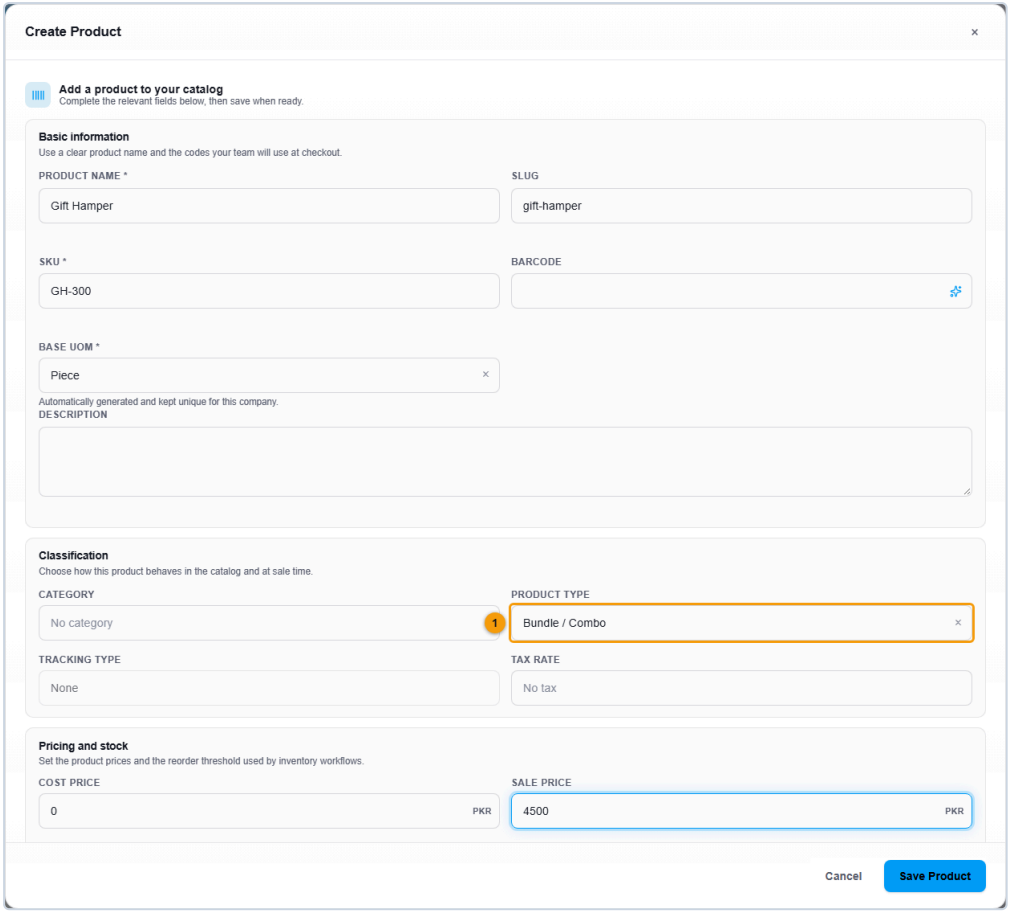
3. Fill in the other details and click **Save Product**.

The product page then shows **Tracking: Serial tracked**. You buy it, receive it and sell it like any other product, and **Stock Levels** shows its quantity.

> **Important:** NEXTOREx does not yet ask for individual serial numbers when you receive or sell a serial tracked product. The setting labels the product. It does not record a serial number per unit. If you need to know which unit went to which customer, keep that record outside NEXTOREx for now.

Bundle / Combo products

1. Click **Add Product**.
2. Choose **Bundle / Combo** in **Product type** (1).



Product type (1). Bundles are not stock tracked directly.

3. Enter the **Sale price** and click **Save Product**.

The product page shows **Product type: Bundle / Combo**. A bundle is not stock tracked directly, and it cannot have variants.

> **Important:** The product screen does not yet let you list the products that make up a bundle, so a bundle created here has no parts. If you sell a gift pack or kit, add its items as separate lines on one sales order.

Related guides

- Add a product
- Stock levels

- Sales orders

Purchasing & Suppliers

Suppliers, purchase orders and receiving

Suppliers

Add the businesses you buy from and keep their payment terms and balances.

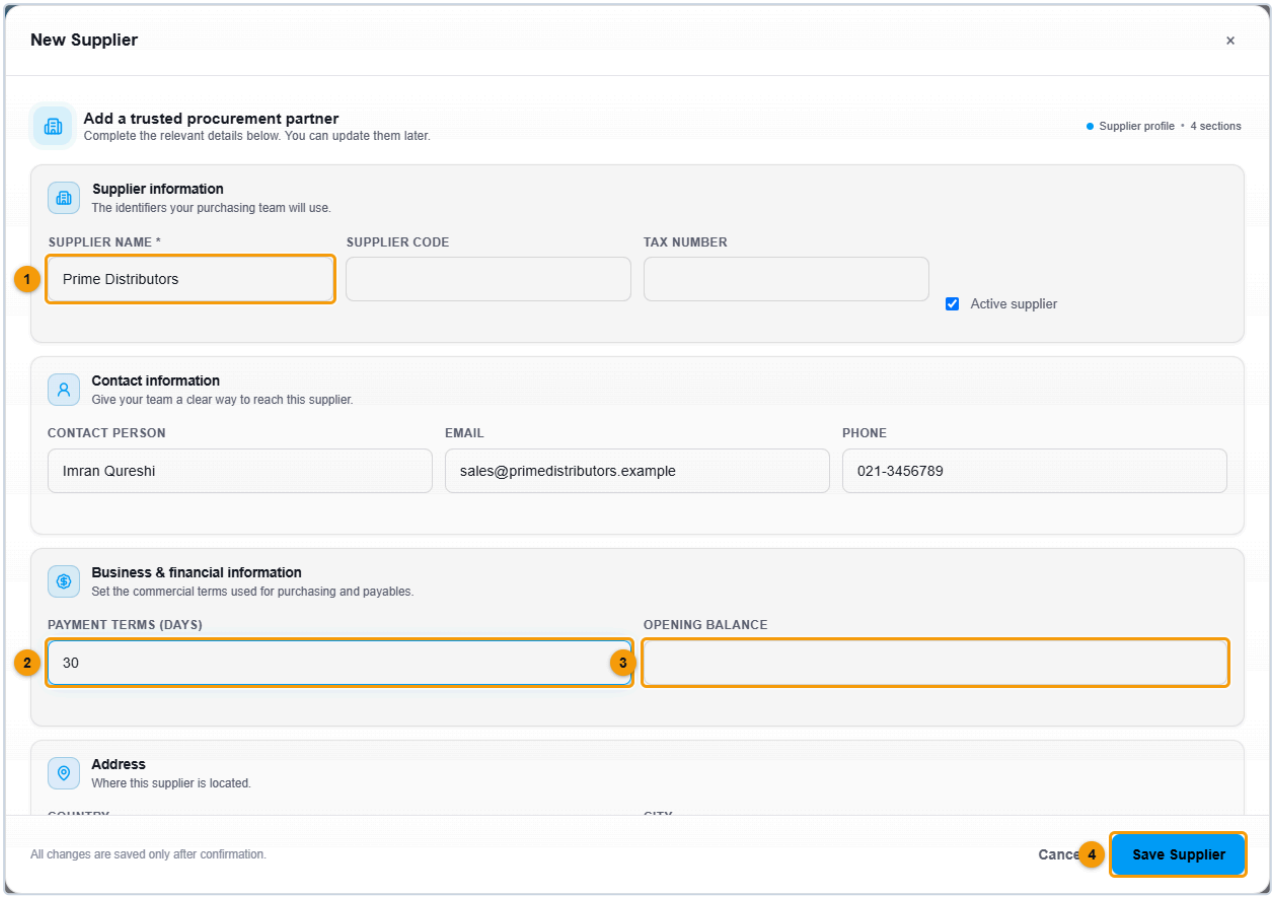
Plan: Starter and above

What this does

A supplier record keeps the details of a business you buy from, and how much you owe them.

Steps

1. Open **Supplier**, then **All Suppliers**.
2. Click **New Supplier**. The **New Supplier** window opens.



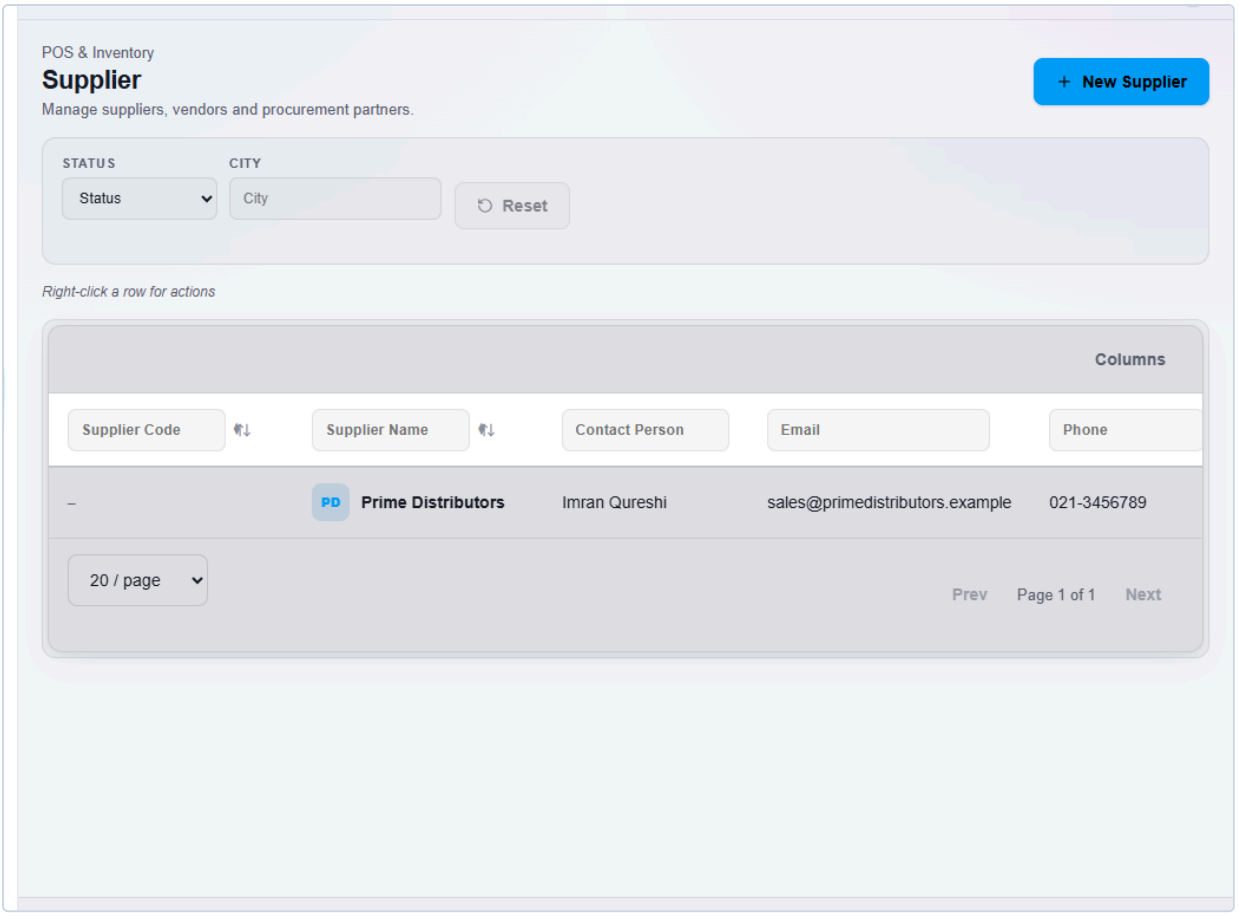
Supplier name, payment terms and opening balance.

3. Enter the **Supplier name** (1). You can add a **Supplier code** and **Tax number**.
4. Add the **Contact person**, **Email** and **Phone**.
5. Enter the **Payment terms (days)** (2), for example 30 if you normally pay after 30 days.
6. If you already owe this supplier money from before, enter it as the **Opening balance** (3).

7. Add the address if you want it on file.
8. Click **Save Supplier** (4).

What happens next

The supplier appears in the list and can be chosen on purchase orders.



The Suppliers list.

Related guides

- Purchase orders
- Customer and supplier ledgers

Purchase orders

Order goods from a supplier, keep the order as a draft or send it, and track what has arrived.

Plan: Starter and above

What this does

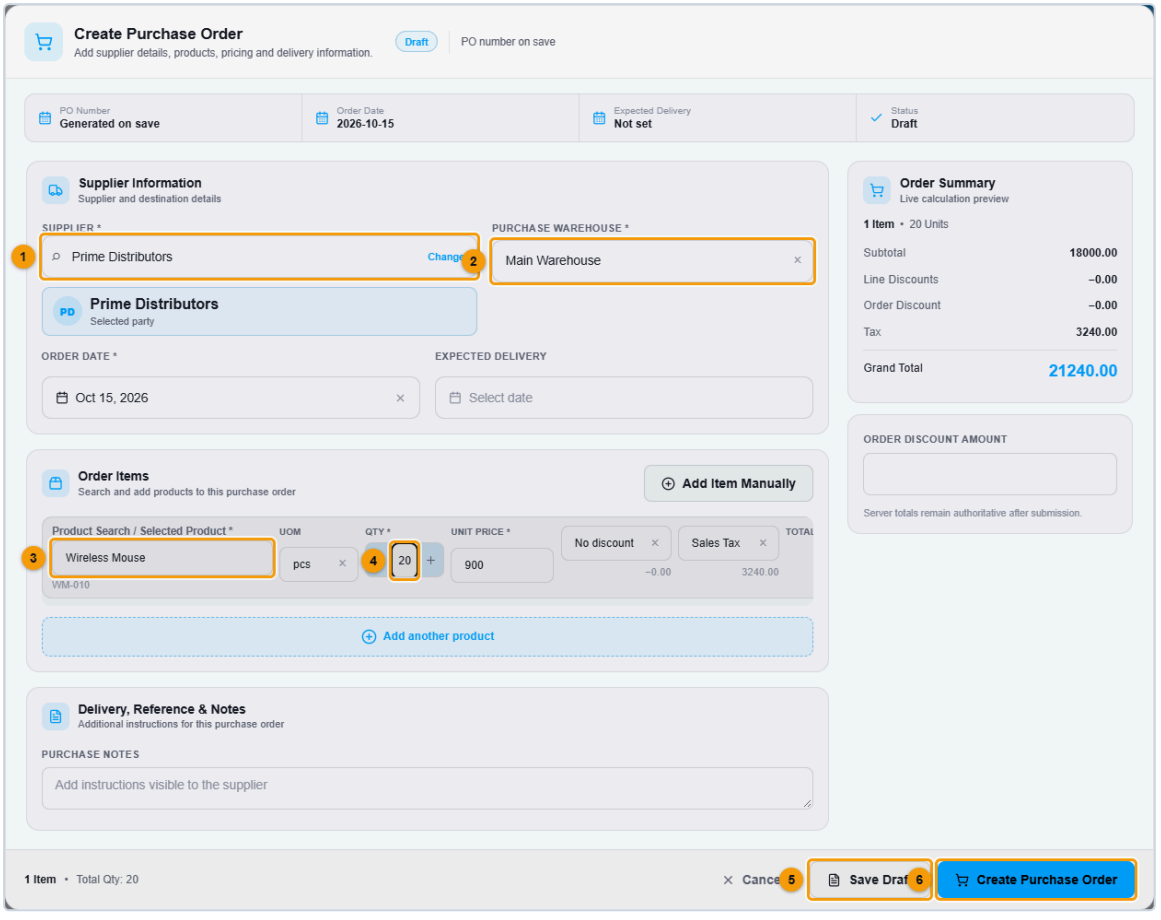
A purchase order (PO) is your order to a supplier. It records what you asked for, at what price, and later what you received and paid.

Before you start

- Add the supplier and the product.

Steps

1. Open **Supplier**, then **Purchase Order**.
2. Click **New purchase order**. The **Create Purchase Order** window opens.



Supplier (1), warehouse (2), product (3), quantity (4), Save Draft (5) and Create Purchase Order (6).

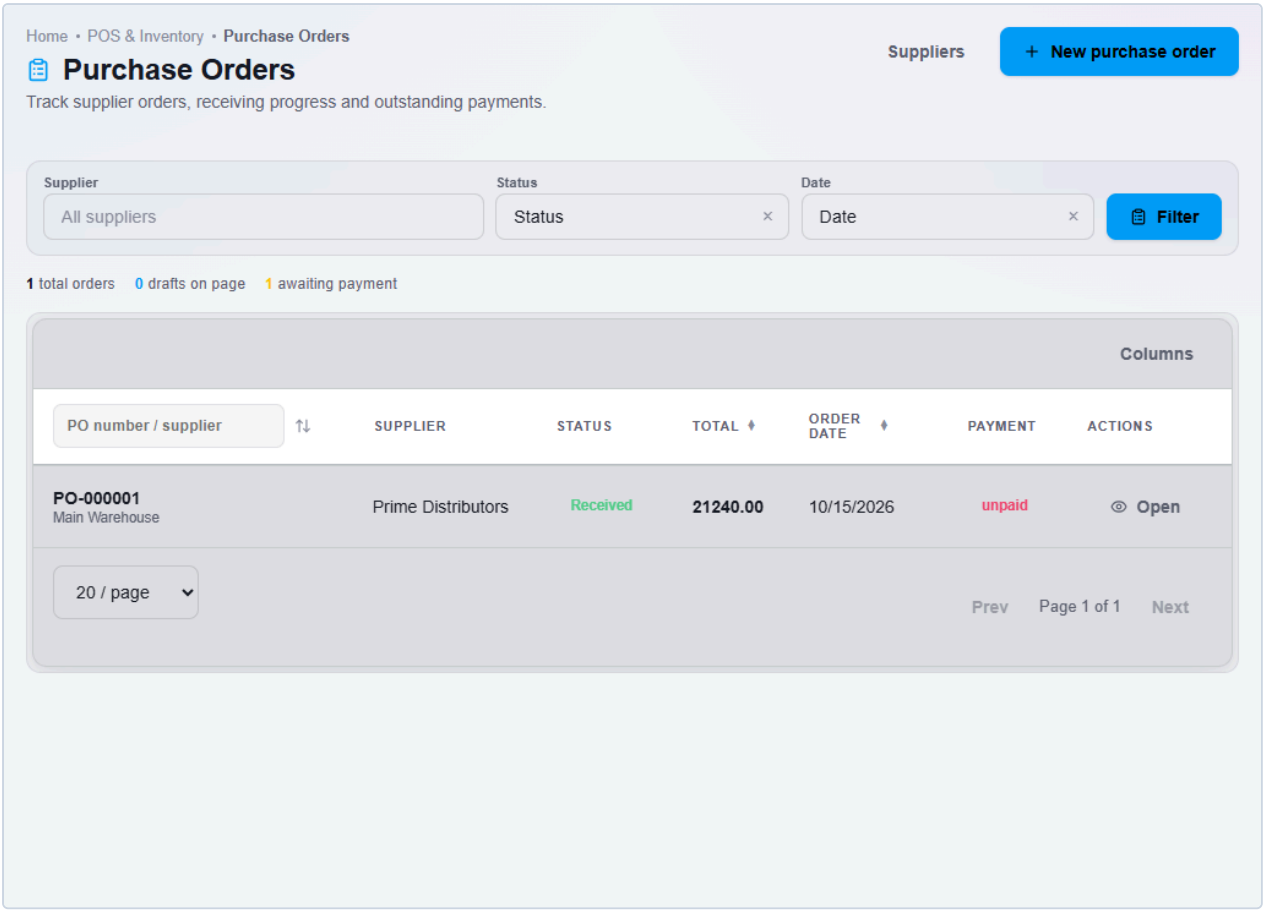
3. Search for and choose the **Supplier** (1).
4. Choose the **Purchase warehouse** (2), where the goods will arrive.
5. Search for a product (3) and pick it. Enter the **Qty** (4). The **Unit price** is filled in from the product cost and you can change it.

6. Click **Add another product** for more lines. The **Order Summary** on the right updates as you go.
7. Add purchase notes if the supplier needs instructions.
8. Click **Save Draft** (5) to keep working on it later, or **Create Purchase Order** (6).

What happens next

The order opens on its own page with the status **Draft**.

- Click **Mark ordered** when you have placed the order with the supplier.
- When the goods arrive, see Receive goods from a supplier.
- To pay the supplier, see Pay a supplier.



All purchase orders and their status.

Important notes

- A product's tax rate is filled in on the line, but NEXTOREx does not treat purchase tax as a separate recoverable tax in your accounts. Ask your accountant how you want to handle it.

Related guides

- Receive goods from a supplier
- Pay a supplier

Receive goods from a supplier

Record the goods that arrived so your stock goes up and the order shows what is still due.

Plan: Starter and above

What this does

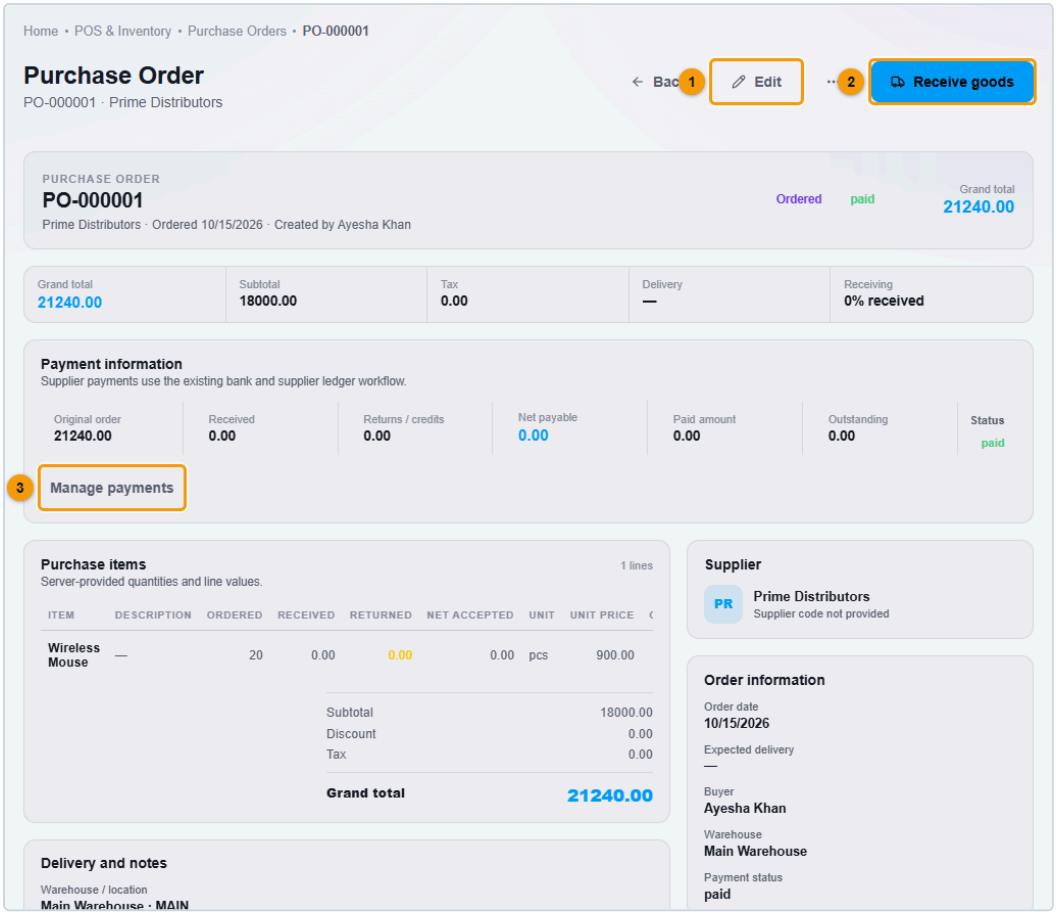
When the supplier's goods arrive, you record them against the purchase order. Your stock goes up and the order shows how much has been received.

Before you start

- You need a purchase order that has been marked as ordered.

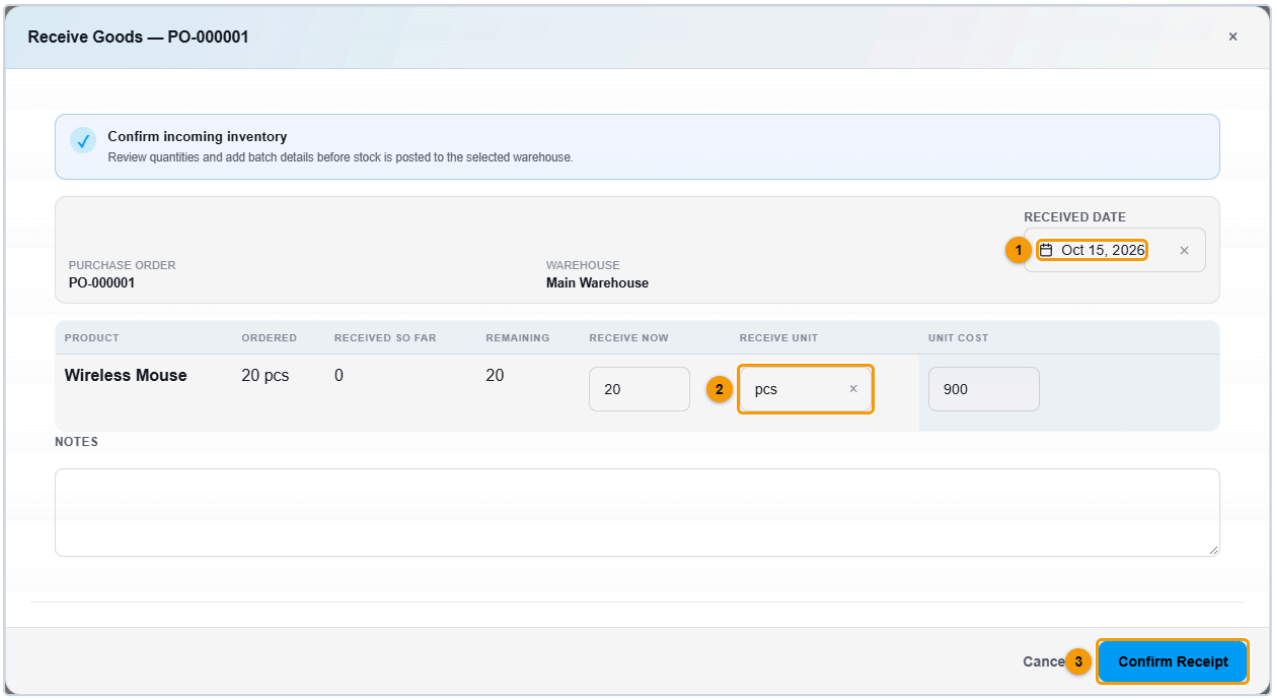
Steps

1. Open **Supplier**, then **Purchase Order**, and double-click the order.



Edit (1), Receive goods (2) and Manage payments (3).

2. Click **Receive goods** (2). The **Receive Goods** window opens.



Received date (1), quantity received (2) and Confirm Receipt (3).

3. Check the **Received date** (1).
4. For each product, check **Receive now** (2). It starts as the full quantity still to come.
5. Check the **Unit cost**.
6. Click **Confirm Receipt** (3).

What happens next

- Stock goes up in the order's warehouse.
- The order shows how much has been **Received** and the **Goods receipts** count goes up.
- The order now shows what you owe the supplier for the goods received. Before goods are received, **Net payable** is 0, so the payment status can read *paid*.

Related guides

- Pay a supplier
- Stock movements

Pay a supplier

Record a payment to a supplier and see what you still owe them.

Plan: Business and above

What this does

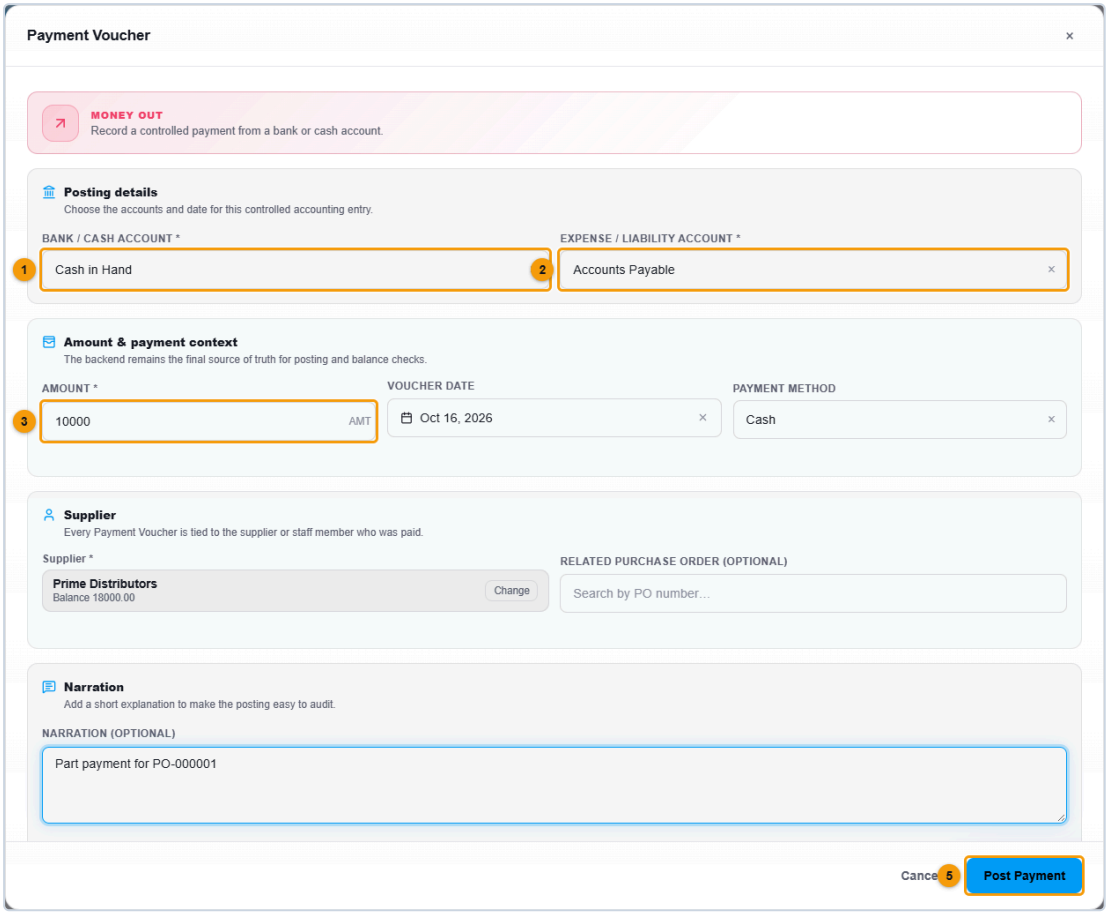
A payment voucher records money you paid to a supplier. It reduces what you owe them and reduces your cash or bank balance.

Before you start

- Receive the goods first. See Receive goods from a supplier.

Steps

1. Open **Finance**, then **Voucher**.
2. Click **Payment**. The **Payment Voucher** window opens.



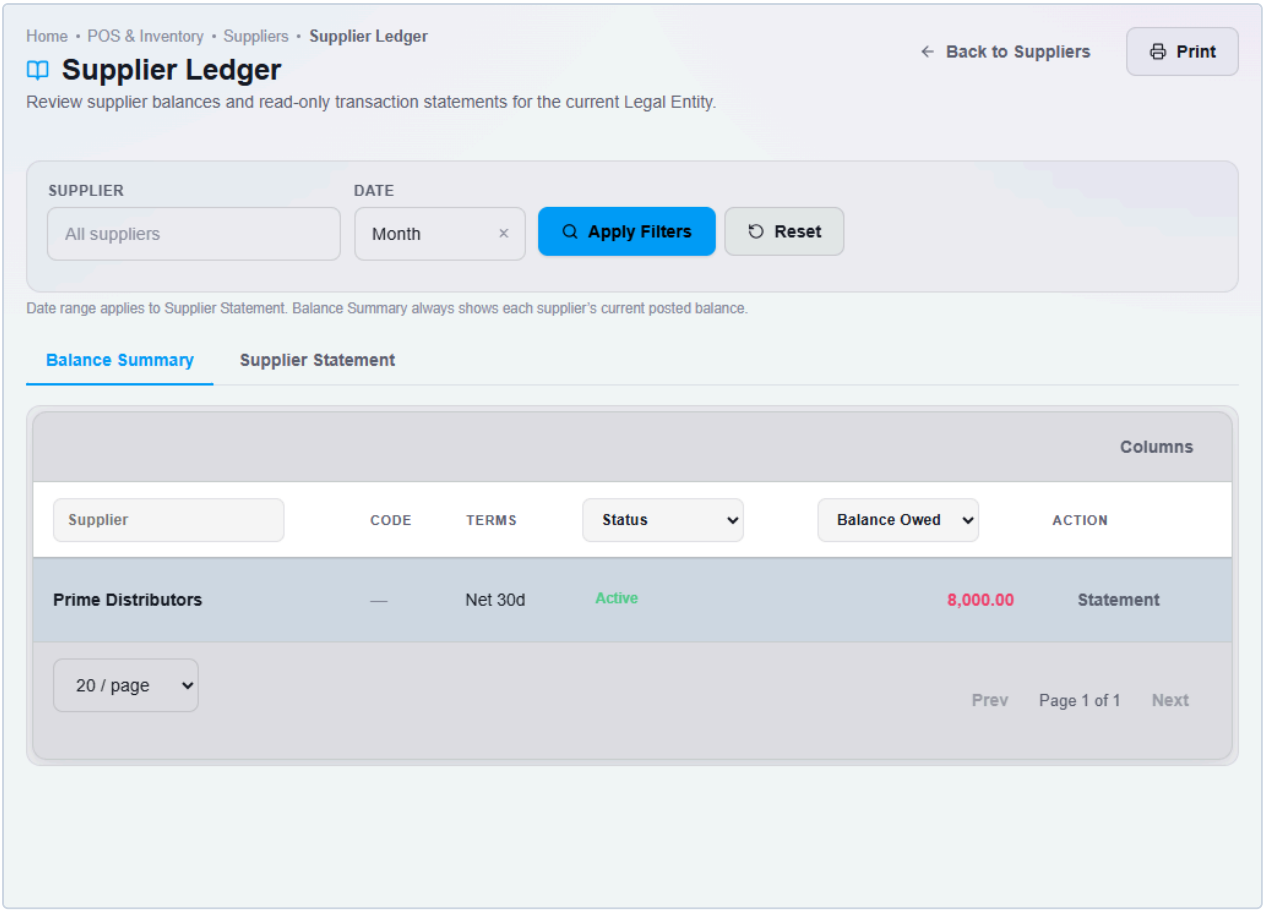
Account paid from (1), account (2), amount (3), supplier (4) and Post Payment (5).

3. Under **Supplier** (4), search for and choose the supplier.
4. Choose the **Bank / cash account** (1) the money comes from, for example *Cash in Hand*.
5. Choose the **Expense / liability account** (2). To pay a supplier for goods you bought, choose *Accounts Payable*.

6. Enter the **Amount** (3).
7. Add a **Narration**, for example *Part payment for PO-000001*.
8. Click **Post Payment** (5).

What happens next

The payment is posted to your accounts. Open **Supplier**, then **Ledger** to see the supplier's balance go down.



Balance owed to each supplier.

Important notes

- A voucher cannot be edited after it is posted. To correct a mistake, reverse it and post a new one. See Vouchers and journal entries.
- Vouchers are part of the accounting features on Business and higher plans.

Related guides

- Vouchers and journal entries
- Customer and supplier ledgers

Purchase returns

Send goods back to a supplier, take them out of stock and reduce what you owe, and record cash if the supplier pays you back.

Plan: Starter and above

What this does

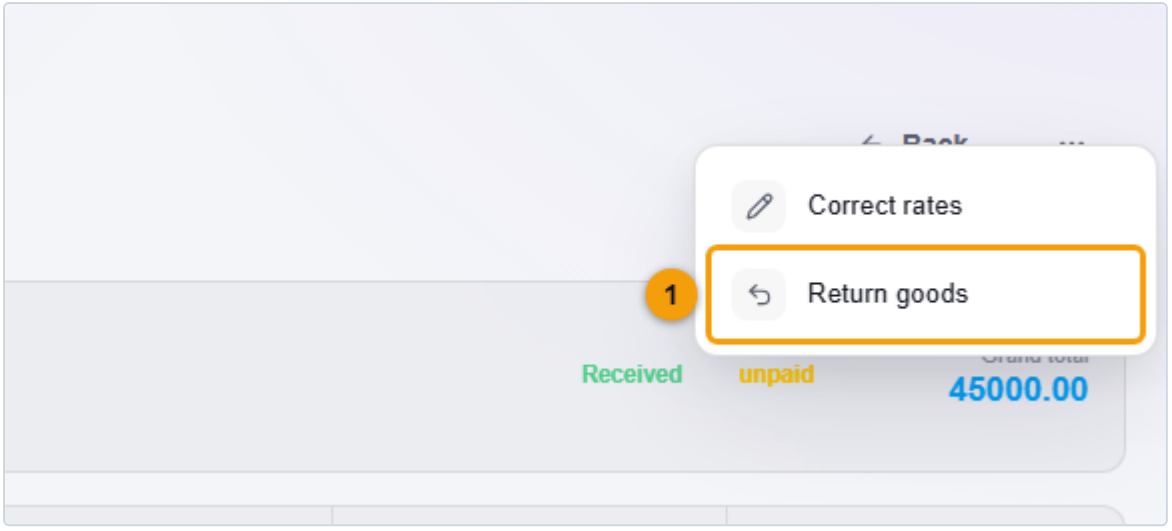
A purchase return sends goods back to a supplier. The returned quantity leaves your stock, and the value of the goods reduces what you owe that supplier.

Before you start

- Open a purchase order that has received goods. See Receive goods.
- The Return Goods window shows how much of each product can still be returned.

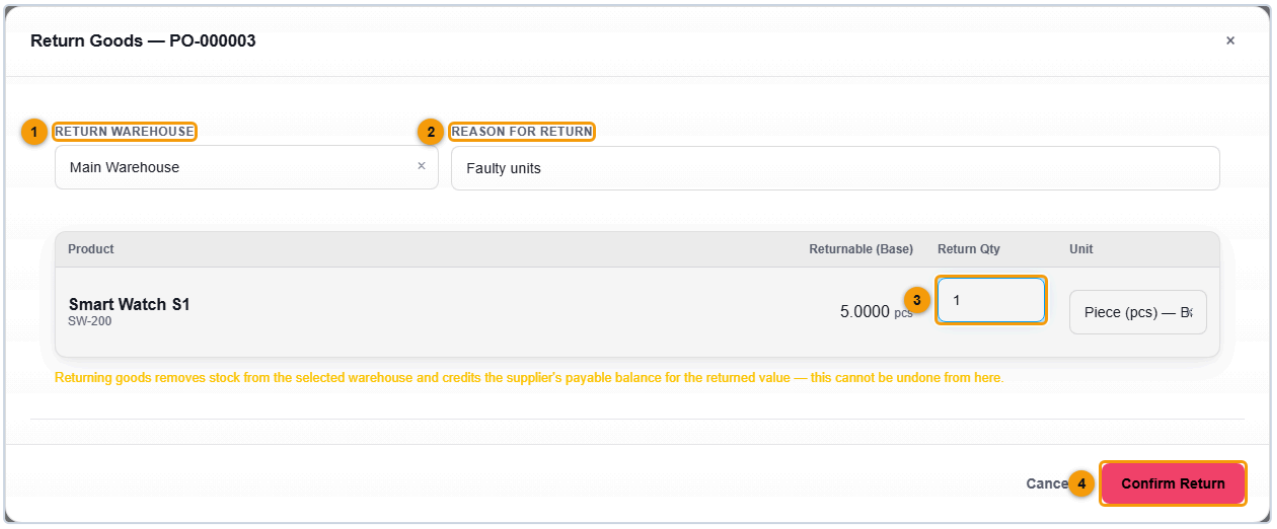
Steps

1. Open **Supplier**, then **Purchase Order**, and open the order (for example **PO-000003**).
2. Click the **...** button at the top right and choose **Return goods** (1).



Return goods (1).

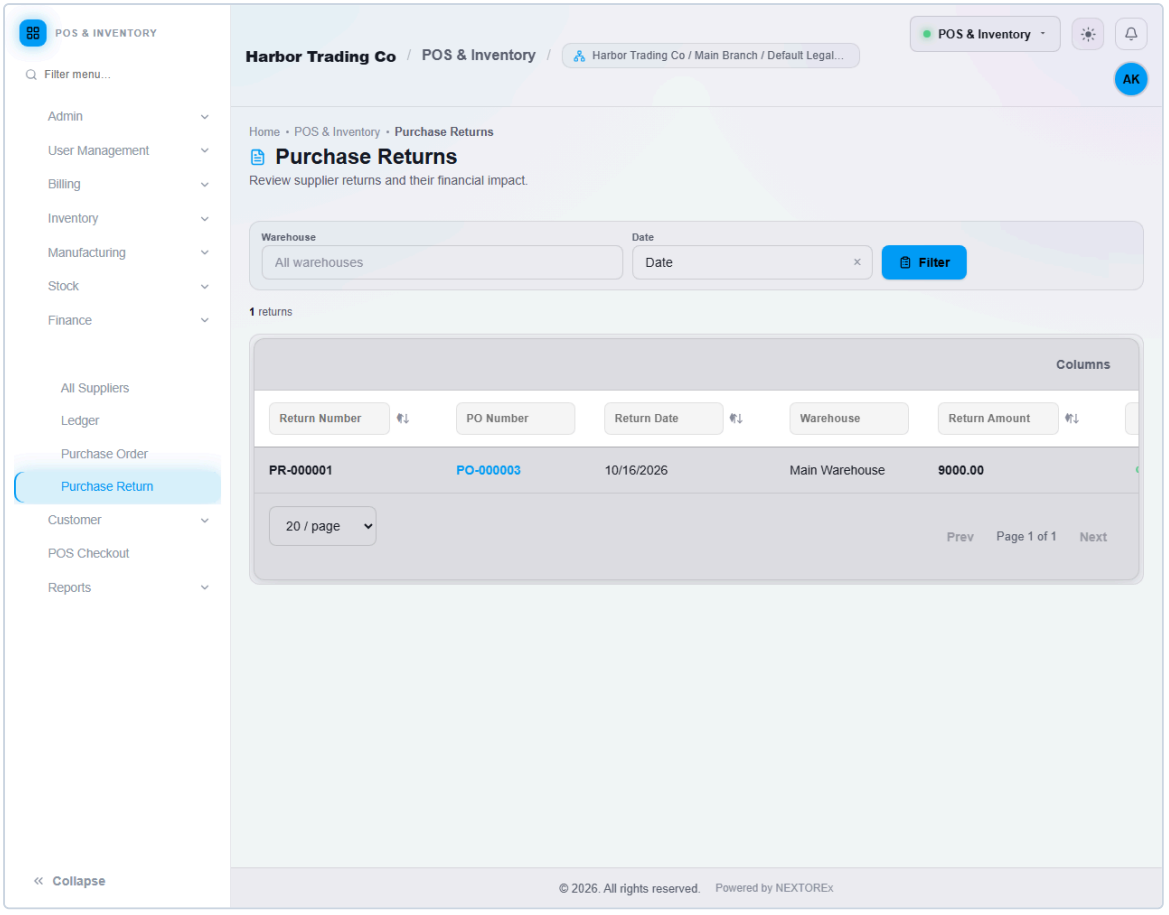
3. Check the **Return warehouse** (1). Stock leaves this warehouse.
4. Type the **Reason for return** (2), for example *Faulty units*.
5. Enter the **Return Qty** (3) for each product. You cannot return more than the returnable quantity.
6. Click **Confirm Return** (4).



Return warehouse (1), reason (2), return quantity (3) and Confirm Return (4).

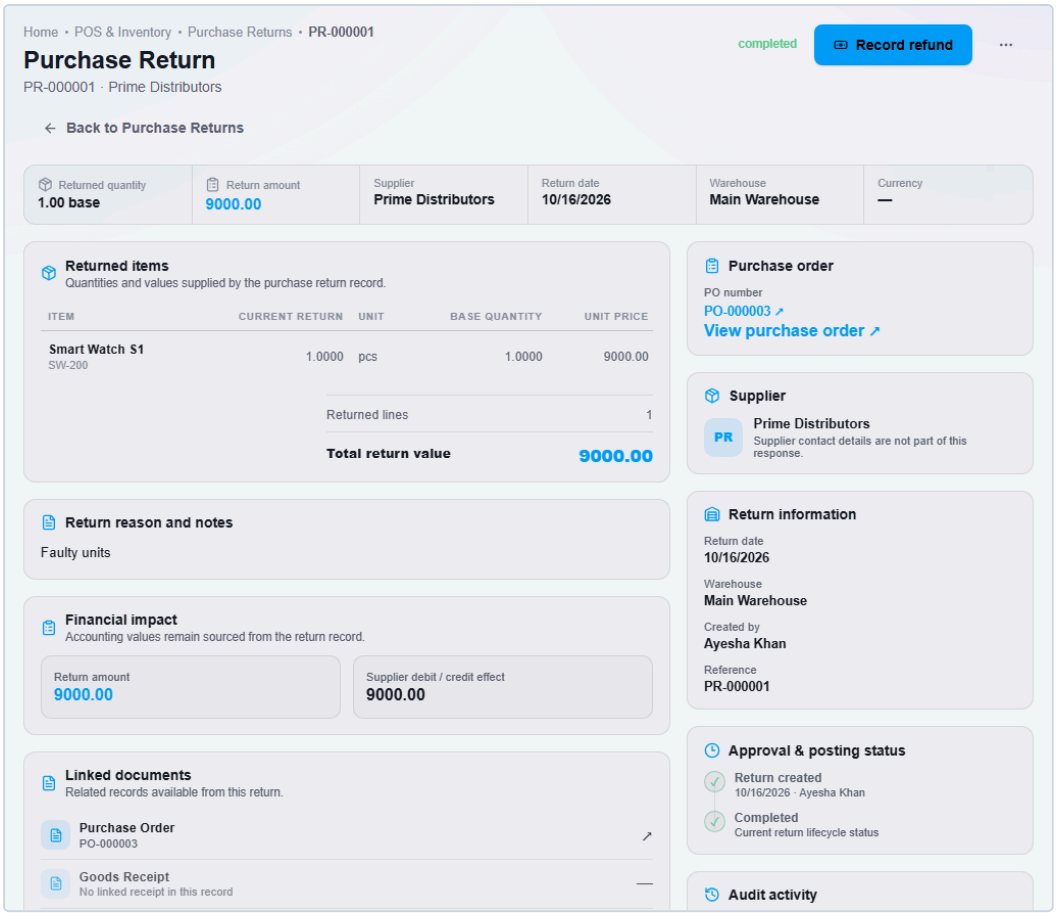
What happens next

- A return such as **PR-000001** is created with the status **completed**. Open **Supplier**, then **Purchase Return** to see all returns.



Each return, its purchase order, the amount and the status.

- The returned quantity is taken out of **Stock Levels** in the return warehouse.
- The value of the return reduces the supplier's payable balance. On the purchase order, the **Returns / credits** and **Net payable** figures change.
- Open the return to see the items, the reason and the financial impact.

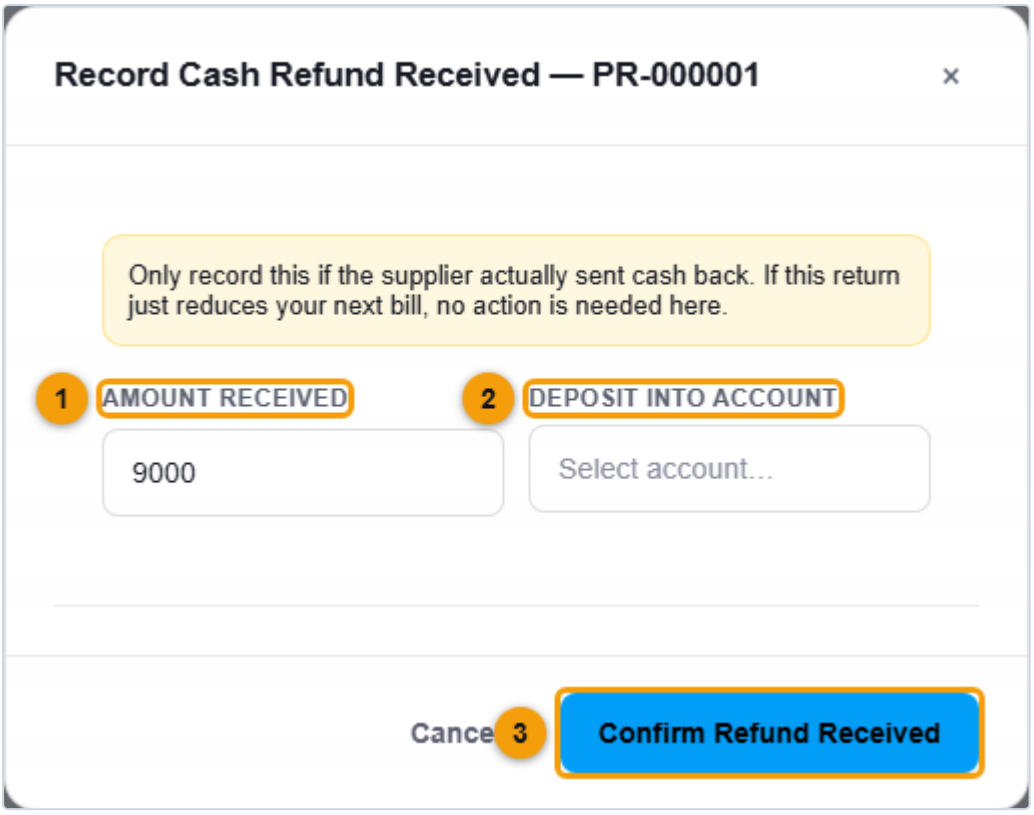


The returned items, reason and financial impact.

If the supplier pays you back in cash

Usually a return only reduces your next bill and nothing more is needed. If the supplier actually sends money back:

1. Open the return and click **Record refund**.
2. Enter the **Amount received** (1) and choose the **Deposit into account** (2).
3. Click **Confirm Refund Received** (3).



Amount received (1), deposit account (2) and Confirm Refund Received (3).

Only record a refund when money really arrived. Otherwise leave it.

Important notes

- You cannot undo a return from the return window. Check the quantity before you confirm.
- **Record refund** is shown only to users whose role allows refunds.
- NEXTOREx does not treat purchase tax as a separate recoverable tax in your accounts. A return follows the values on the purchase order. Ask your accountant how to treat purchase tax.

Related guides

- Purchase orders
- Receive goods
- Pay a supplier

Accounting & Banking

Accounts, vouchers, banking and reports

Receive a customer payment

Record money a customer pays you later, so their balance goes down.

Plan: Business and above

What this does

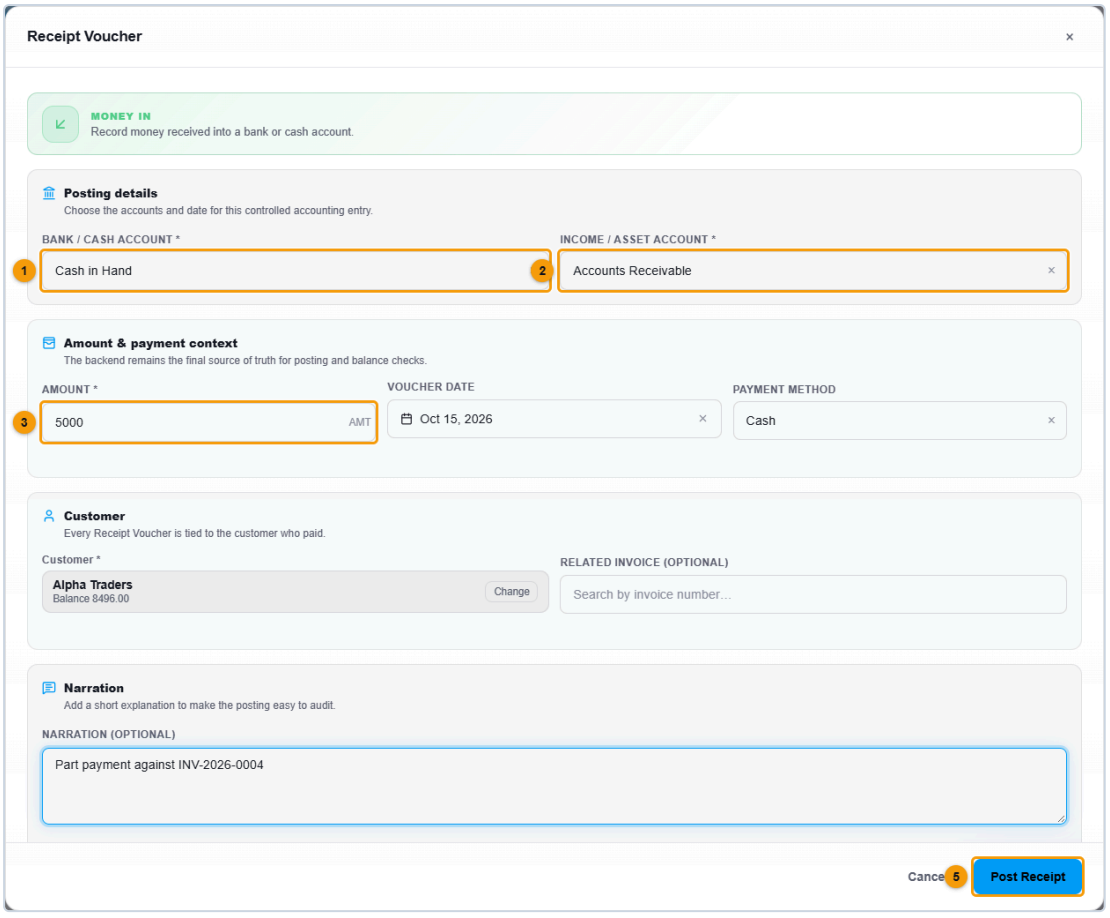
When a customer pays you money they owed, you record it with a receipt voucher. Their balance goes down and your cash or bank balance goes up.

Before you start

- The customer must already owe you money, for example from a part payment or a delivered sales order.

Steps

1. Open **Finance**, then **Voucher**.
2. Click **Receipt**. The **Receipt Voucher** window opens.

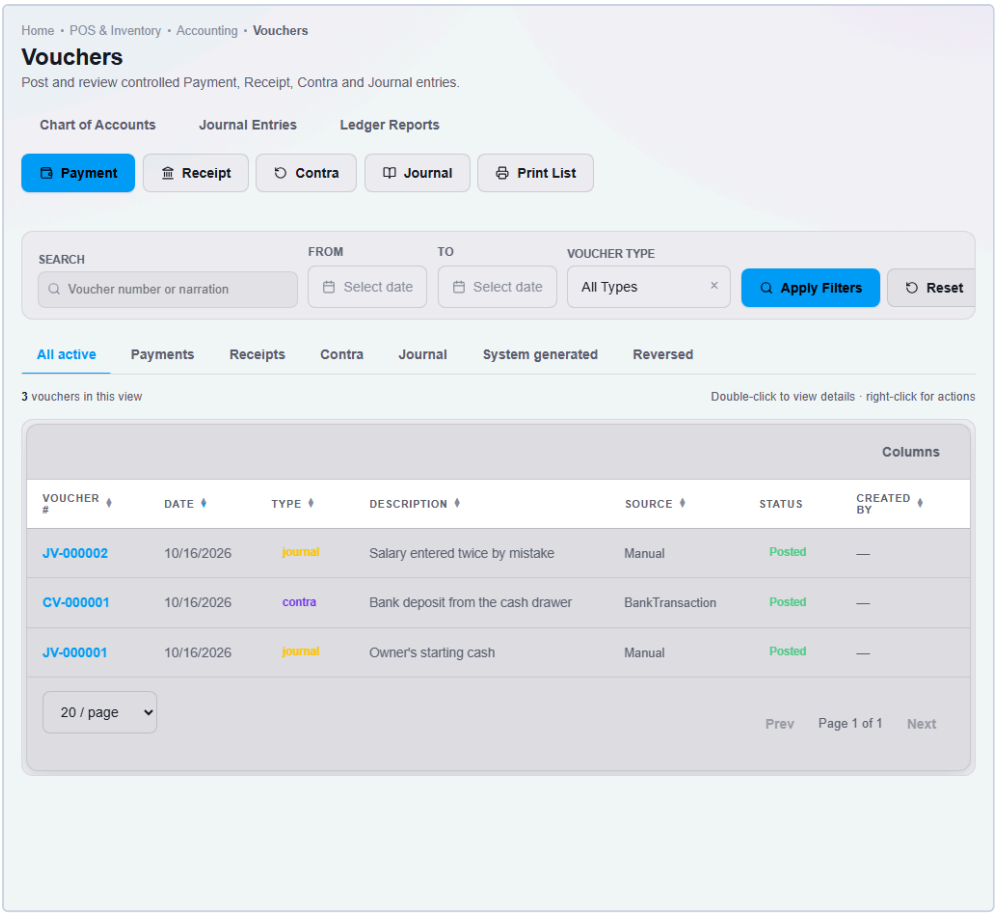


Cash or bank account (1), account (2), amount (3), customer (4) and Post Receipt (5).

3. Under **Customer**, search by name or phone and choose the customer. Their current balance is shown. If your account also uses Education, this box is called **Customer or Student** and every result carries a **CUSTOMER** or **STUDENT** badge. See Education receipt and payment vouchers.
4. Choose the **Bank / cash account** (1) that received the money, for example *Cash in Hand*.
5. Choose the **Income / asset account** (2). To collect from a customer for a sale already invoiced, choose *Accounts Receivable*.
6. Enter the **Amount** (3) and check the **Voucher date** and **Payment method**.
7. Add a **Narration**, for example *Part payment against INV-2026-0004*.
8. Click **Post Receipt** (5).

What happens next

The receipt is posted to your accounts. The customer's balance goes down by the amount you entered. Check it in the **Customer Ledger** or on the customer list.



Posted vouchers, including the receipt you just made.

Important notes

- The **Related invoice** box is optional. The payment reduces the customer's balance whether or not you pick an invoice.

Related guides

- Customer and supplier ledgers
- Vouchers and journal entries
- Student payments and fee statement

Chart of Accounts

See the list of accounts NEXTOREx keeps for your business and add your own.

Plan: Starter and above (adding accounts needs Business and above)

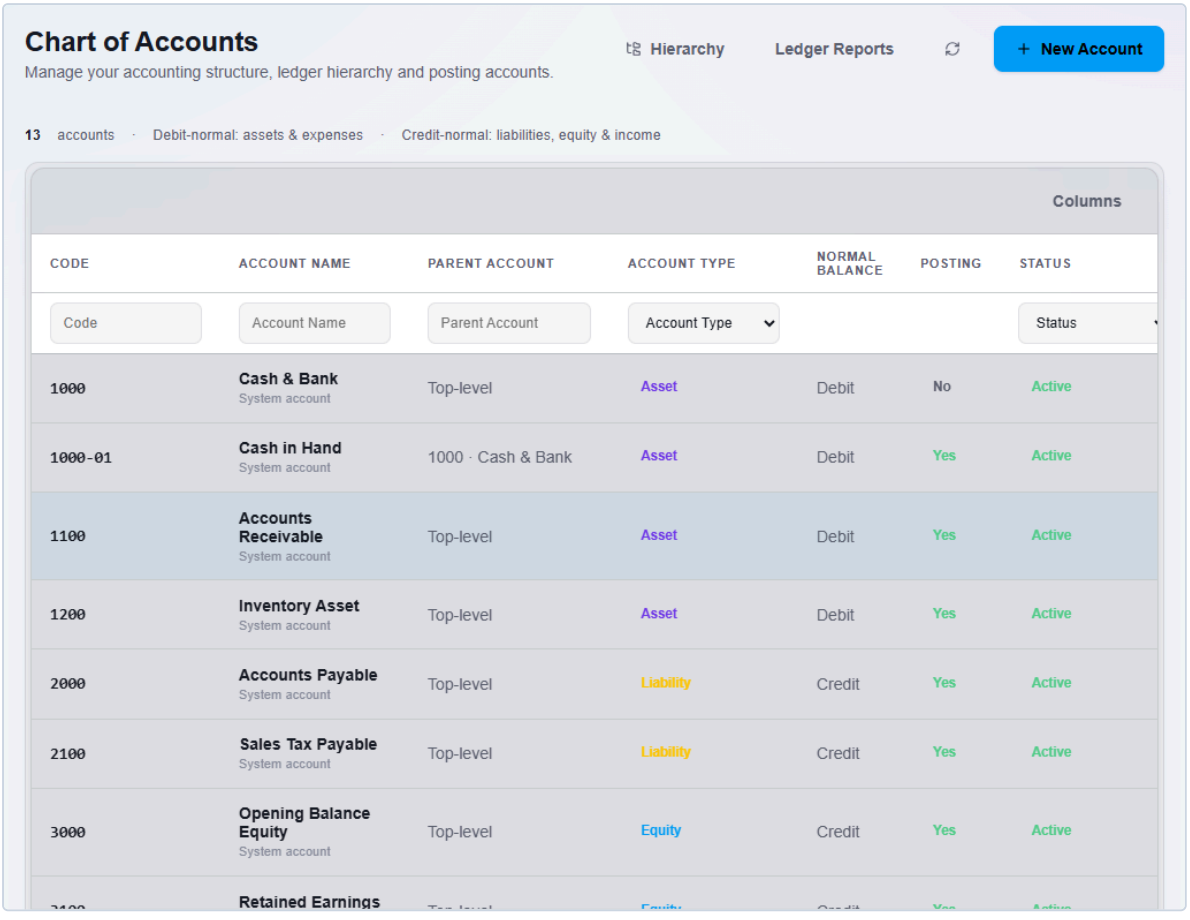
What this does

The Chart of Accounts is the list of accounts where NEXTOREx records money: cash, bank, what customers owe you, what you owe suppliers, sales, costs and more. NEXTOREx uses double-entry accounting, so every sale, purchase and payment is recorded in two accounts for you. A starting set of accounts is created with your business.

Steps

To look at your accounts:

1. Open **Finance**, then **Chart of Accounts**.
2. Read the list. Each account has a **Code**, **Account name**, **Account type**, **Normal balance**, and whether it can be posted to.



Your accounts, for example Cash in Hand, Accounts Receivable and Sales Revenue.

To add an account:

1. Click **New Account**.
2. Enter a **Code** and the **Account name**.

3. Choose the **Account category**. Optionally choose a **Parent account** to place it under another account.
4. Leave **Active account** switched on.
5. Click **Save Account**.

What happens next

The new account appears in the list and can be chosen when you post vouchers and bank transactions.

Important notes

- You do not need to make accounts for normal sales, purchases and stock. NEXTOREx posts those to the right accounts for you.
- Ask your accountant before adding accounts.

Related guides

- Vouchers and journal entries
- Customer and supplier ledgers

Vouchers and journal entries

Post payments, receipts, transfers and manual journal entries, and reverse a voucher if you made a mistake.

Plan: Business and above

What this does

A voucher is a record of money moving. NEXTOREx has four kinds:

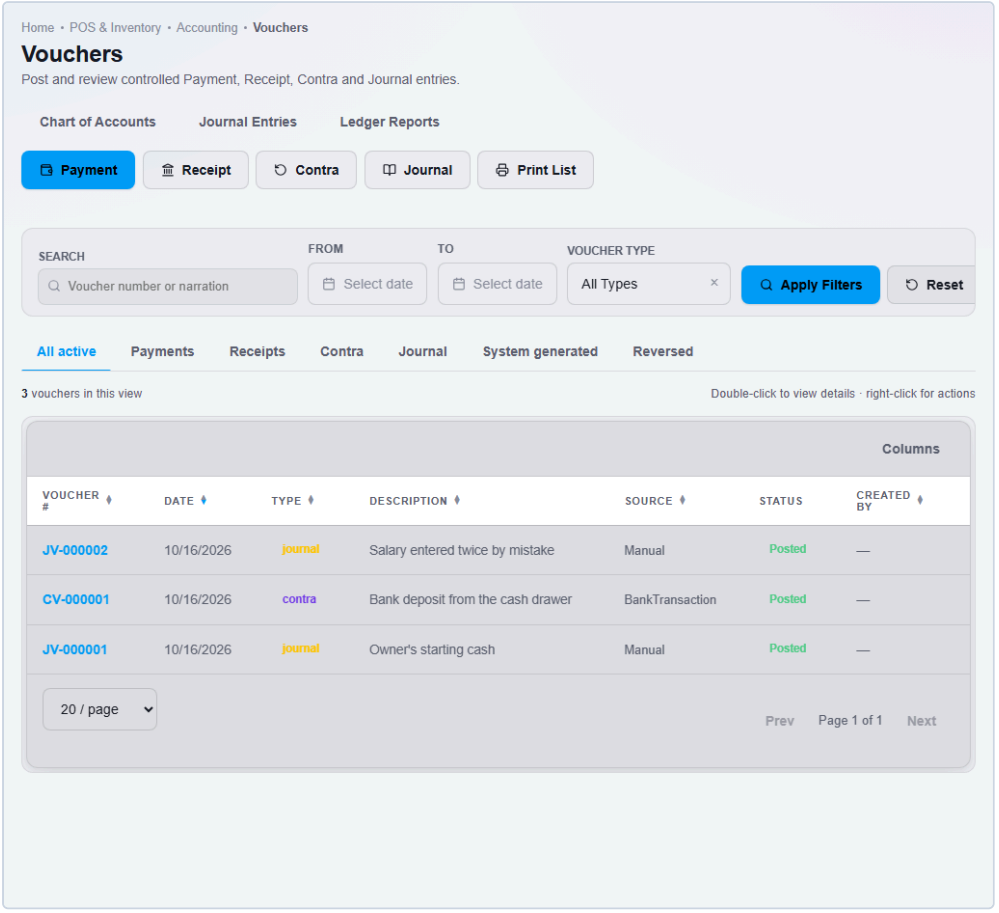
- **Payment**: money you pay out, for example to a supplier.
- **Receipt**: money you receive, for example from a customer.
- **Contra**: money moved between your own cash and bank accounts.
- **Journal**: a manual entry for an accountant, with debits and credits that must balance.

Sales, purchases and other actions in NEXTOREx also create entries for you. These are marked as system generated.

Steps

To see vouchers:

1. Open **Finance**, then **Voucher**.
2. Use the filters at the top to search by text, date or voucher type.



Posted vouchers with their type, date and status.

To post a voucher:

1. Click **Payment**, **Receipt**, **Contra** or **Journal**.
2. Fill in the window. See Pay a supplier and Receive a customer payment.
3. For a Journal voucher, add lines with **Add line**. Each line has an account and either a debit or a credit. The bottom of the window shows **Balanced** when debits equal credits.
4. Click the post button.

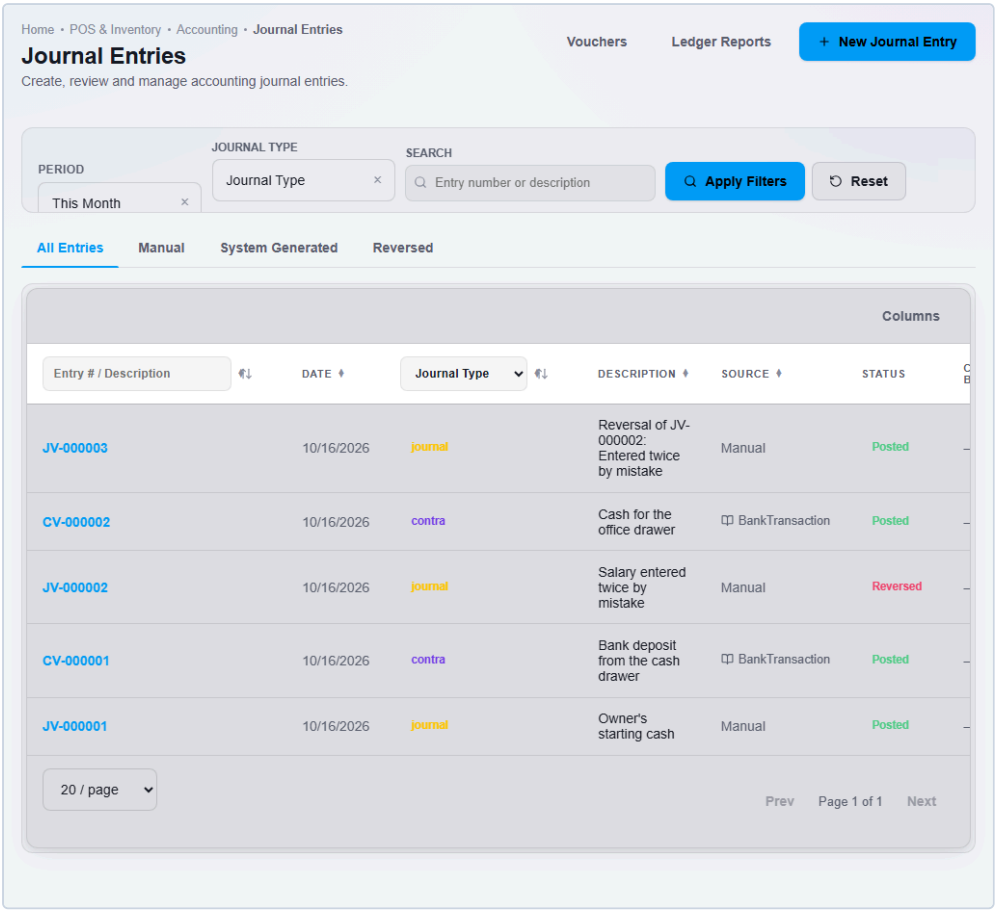
To look at or undo a voucher:

1. Right-click the voucher in the list.
2. Choose **View details**, **Print voucher** or **Reverse voucher**.

What happens next

If you made a mistake, choose **Reverse voucher** instead of trying to edit it. NEXTOREx records an opposite entry and marks the original as reversed. Then post the correct voucher.

The **Journal Entries** page shows all entries, with filters for manual, system generated and reversed entries.



Every entry, including the ones NEXTOREx made for you.

Schools and academies that use Education record student receipts and staff payments with the same screen. The party box shows **Student**, **Staff**, **Customer** and **Supplier** badges. See Education receipt and payment vouchers.

Step-by-step guides

- Post a journal voucher
- Move money between your own accounts (Contra voucher)
- Reverse a voucher
- Ledger reports

Related guides

- Chart of Accounts
- Customer and supplier ledgers
- Education receipt and payment vouchers

Bank and cash accounts

Add the bank accounts and cash drawers you use, with their opening balances.

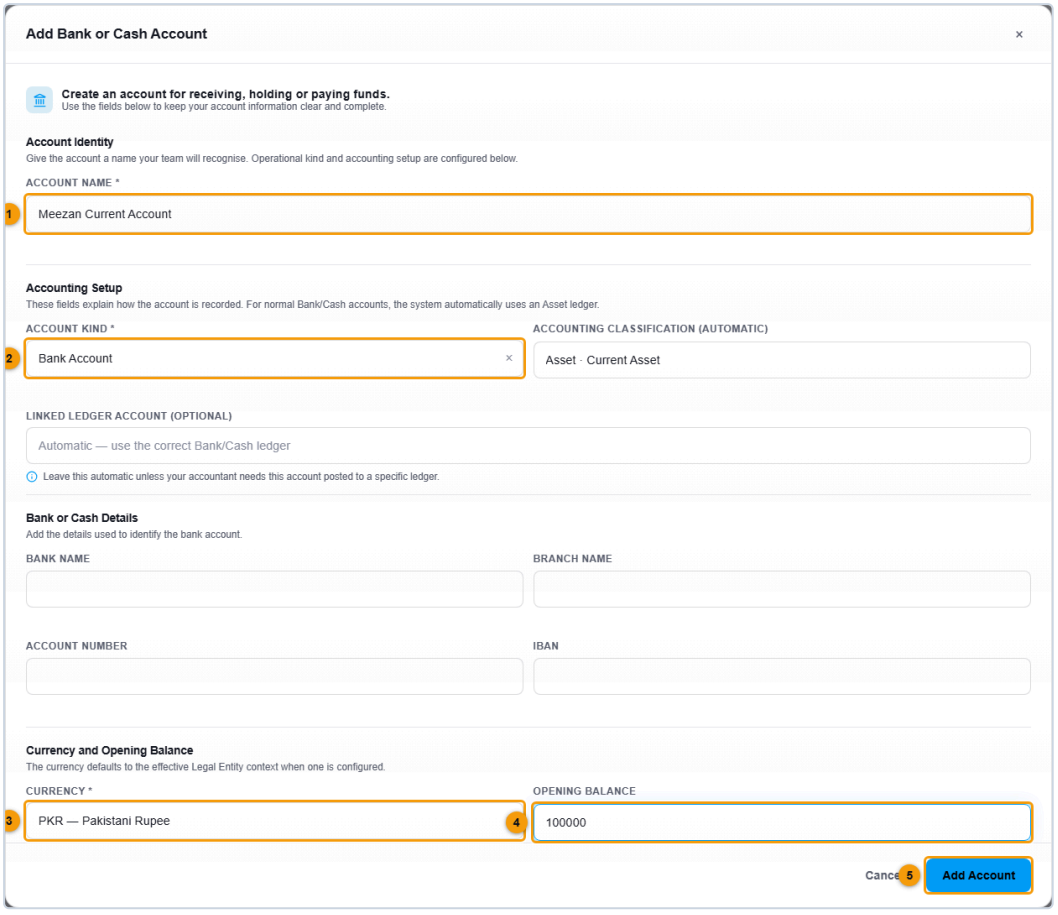
Plan: Business and above

What this does

Bank and cash accounts are the places your money sits: a bank account, or cash in a drawer. Sales, receipts and payments are recorded against them so you can see each balance. A cash account named **Cash in Hand** is created for you.

Steps

1. Open **Finance**, then **Bank**.
2. Click **Add Account**.

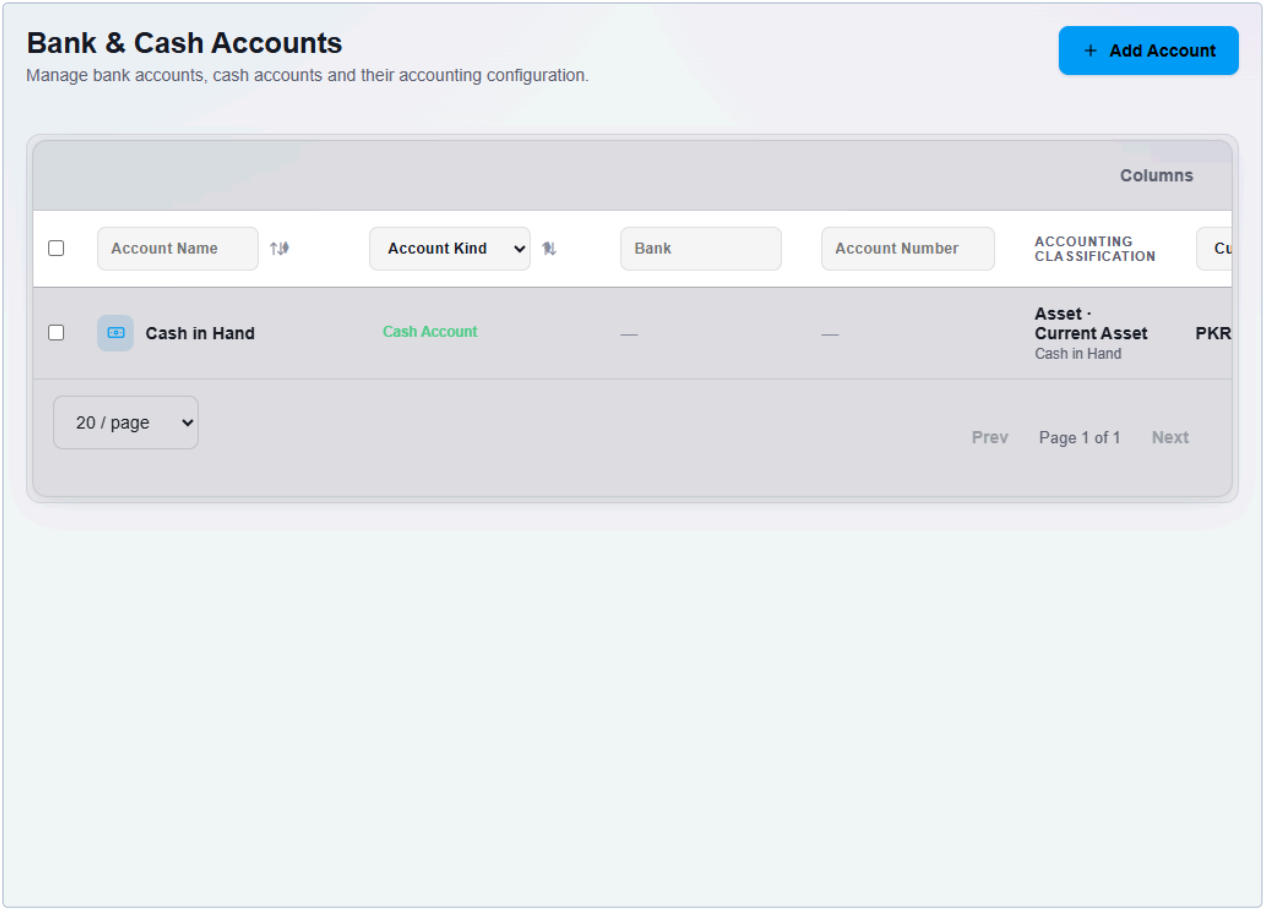


Name (1), kind (2), currency (3), opening balance (4) and Add Account (5).

3. Enter the **Account name** (1), for example *Meezan Current Account*.
4. Choose the **Account kind** (2): **Bank Account** or **Cash Account**.
5. Choose the **Currency** (3).
6. If the account already has money in it, enter the **Opening balance** (4).
7. Click **Add Account** (5).

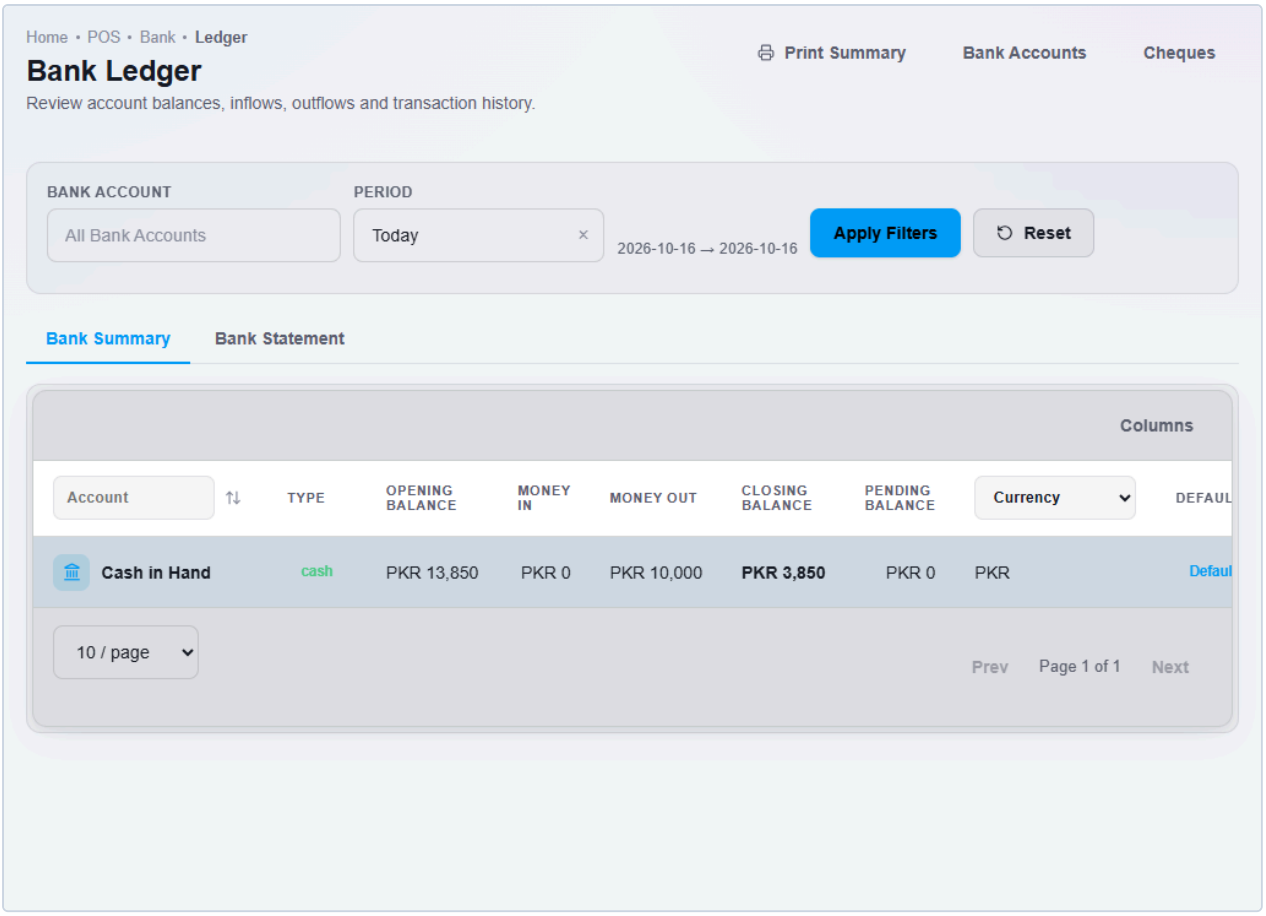
What happens next

The account is listed under **Bank** and can be used when you record deposits, withdrawals, transfers and cheques.



Your bank and cash accounts.

To see the money in and out of each account, open **Bank Ledger**. Use **Bank Summary** for balances and **Bank Statement** for a list of transactions.



Opening balance, money in, money out and closing balance for each account.

Related guides

- Deposits, withdrawals and transfers
- Cheques

Post a journal voucher

Step by step: post a manual journal entry with balanced debits and credits, then check it.

Plan: Business and above

What this does

A journal voucher is a manual entry for your accountant. You choose the accounts, and for each account you enter either a debit or a credit. NEXTOREx only posts the voucher when total debits equal total credits.

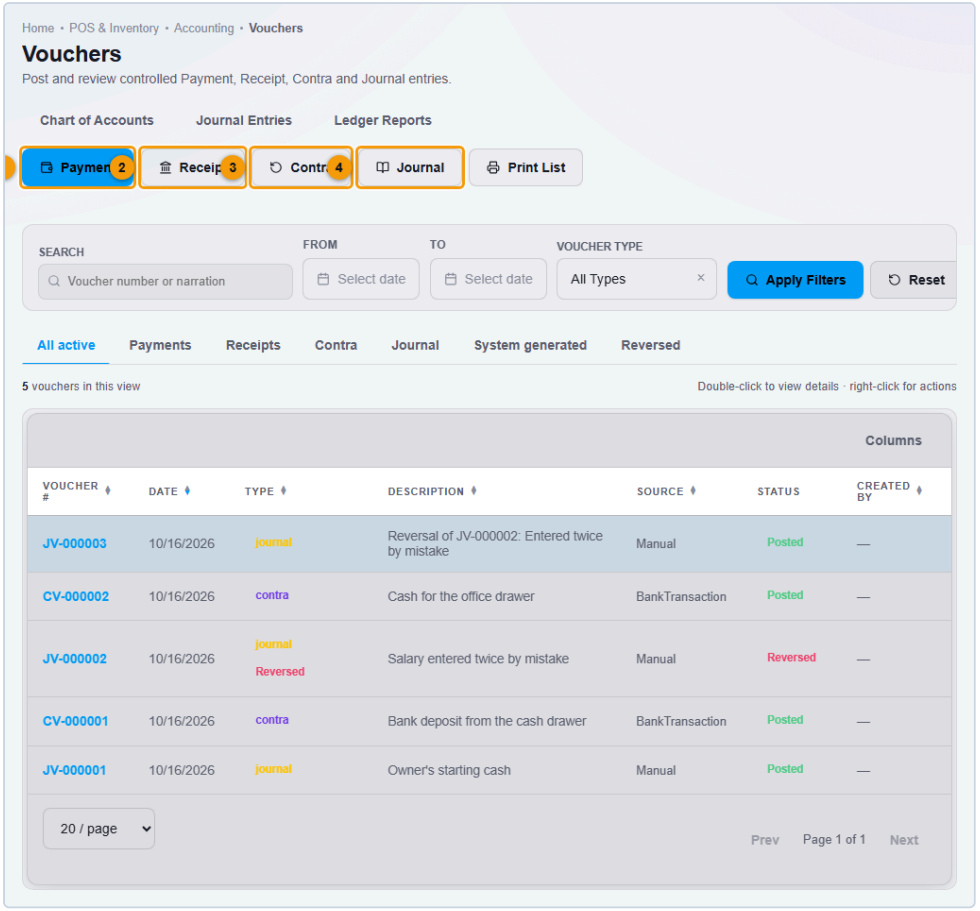
This guide posts a month-end accrual: the October salary of 30,000 is an expense now, and you owe it.

Before you start

- You need permission to post vouchers. Your plan must include accounting.
- Know the accounts you will use. Open **Chart of Accounts** to look them up. See Chart of Accounts.

Steps

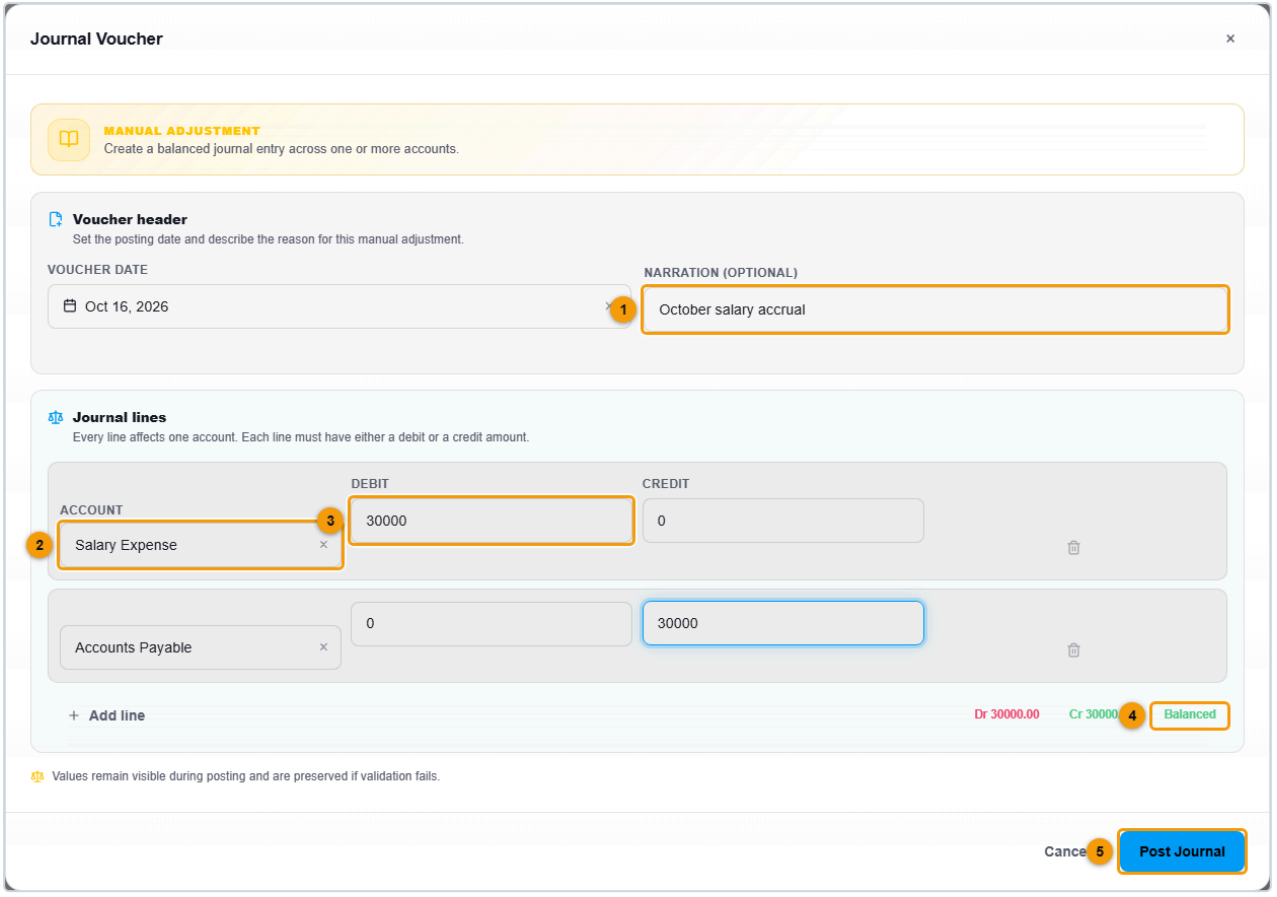
1. Open **Finance**, then **Voucher**.



Payment (1), Receipt (2), Contra (3) and Journal (4).

2. Click **Journal** (4). The **Journal Voucher** window opens.
3. Check the **Voucher date**. Type a **Narration** (1), for example *October salary accrual*.

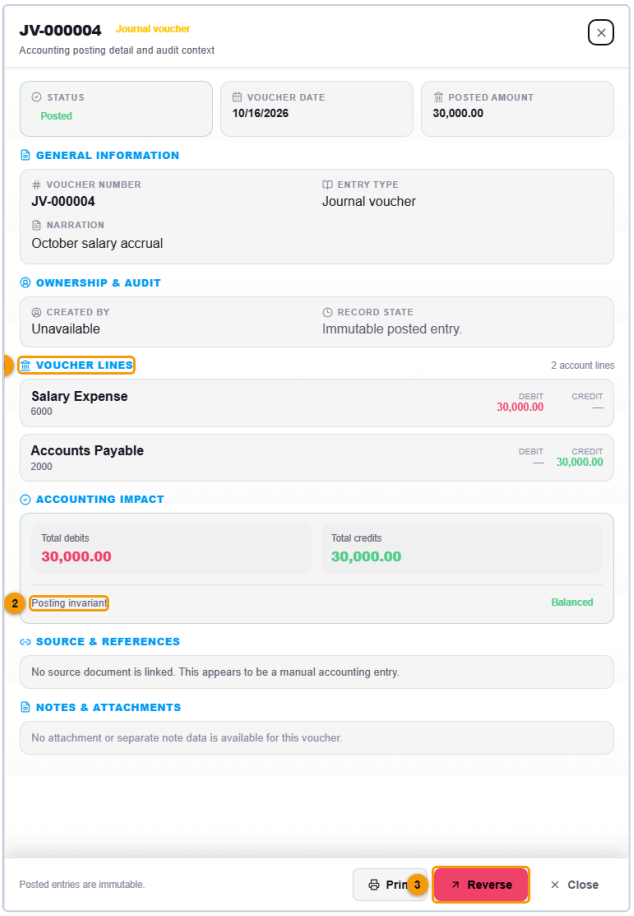
4. On the first line, choose the **Account** (2), for example **Salary Expense**, and type the amount under **Debit** (3).
5. On the second line, choose **Accounts Payable** and type the same amount under **Credit**.
6. Use **Add line** if you need more lines. Use the bin icon to remove a line.
7. Check the bottom of the window. It shows the total debit, the total credit and **Balanced** (4).
8. Click **Post Journal** (5).



Narration (1), account (2), debit (3), Balanced (4) and Post Journal (5).

What happens next

The voucher is posted with a number such as **JV-000004** and appears in the **Vouchers** list with the source **Manual**. Double-click it to open the details: the voucher lines, the total debits and credits, and the note *Posted entries are immutable*.



The lines (1), the Balanced check (2) and Reverse (3).

The accounts change straight away. Salary Expense shows in your Profit and Loss report, and Accounts Payable shows in your Balance Sheet.

Important notes

- You cannot edit or delete a posted voucher. If it is wrong, reverse it and post the correct one.
- Each line has a debit **or** a credit, not both.
- Do not use a journal voucher to move money in or out of a bank or cash account. Use a Contra voucher, a payment, a receipt or a bank transaction, so the balance shown for the bank or cash account stays right.

Related guides

- Vouchers and journal entries
- Reverse a voucher
- Ledger reports

Deposits, withdrawals and transfers

Record money going into or out of a bank or cash account, and move money between your accounts.

Plan: Business and above

What this does

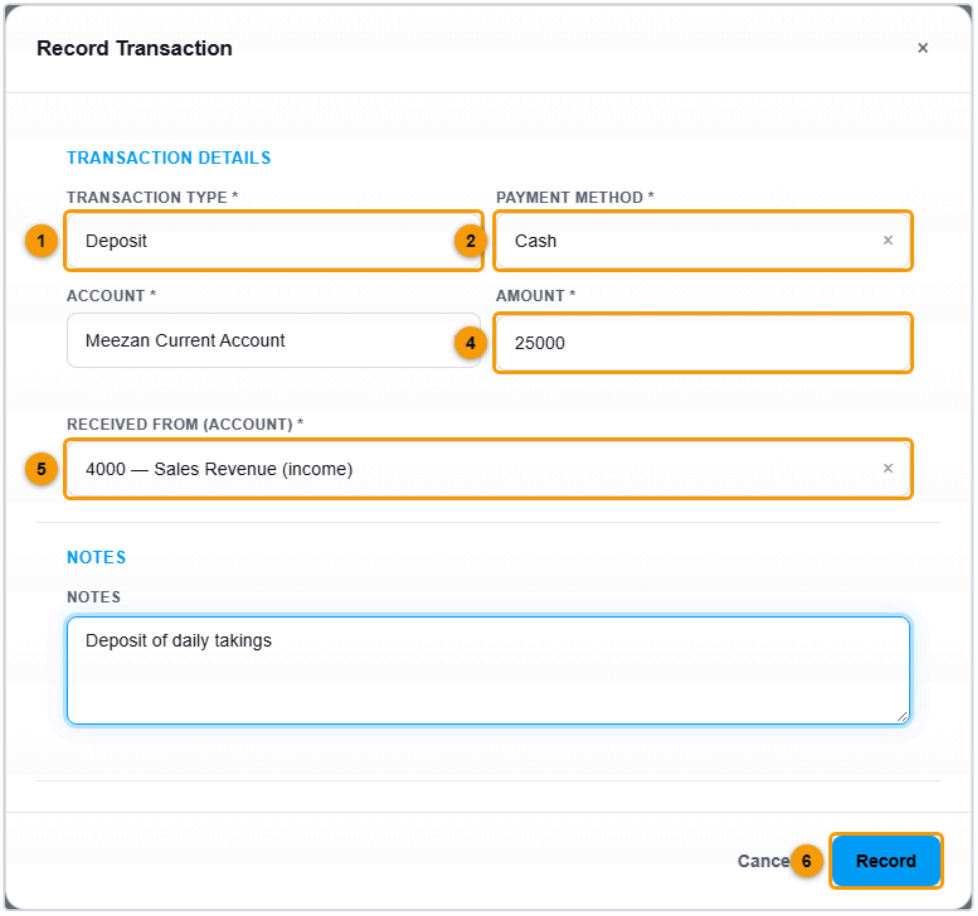
Use these to keep your bank and cash balances correct for money that does not come from a sale or a supplier payment: depositing takings, paying an expense from the bank, or moving cash to the bank.

Before you start

- Add your bank and cash accounts.

Record a deposit

1. Open **Finance**, then **Bank Transaction**.
2. Click **Record transaction**.



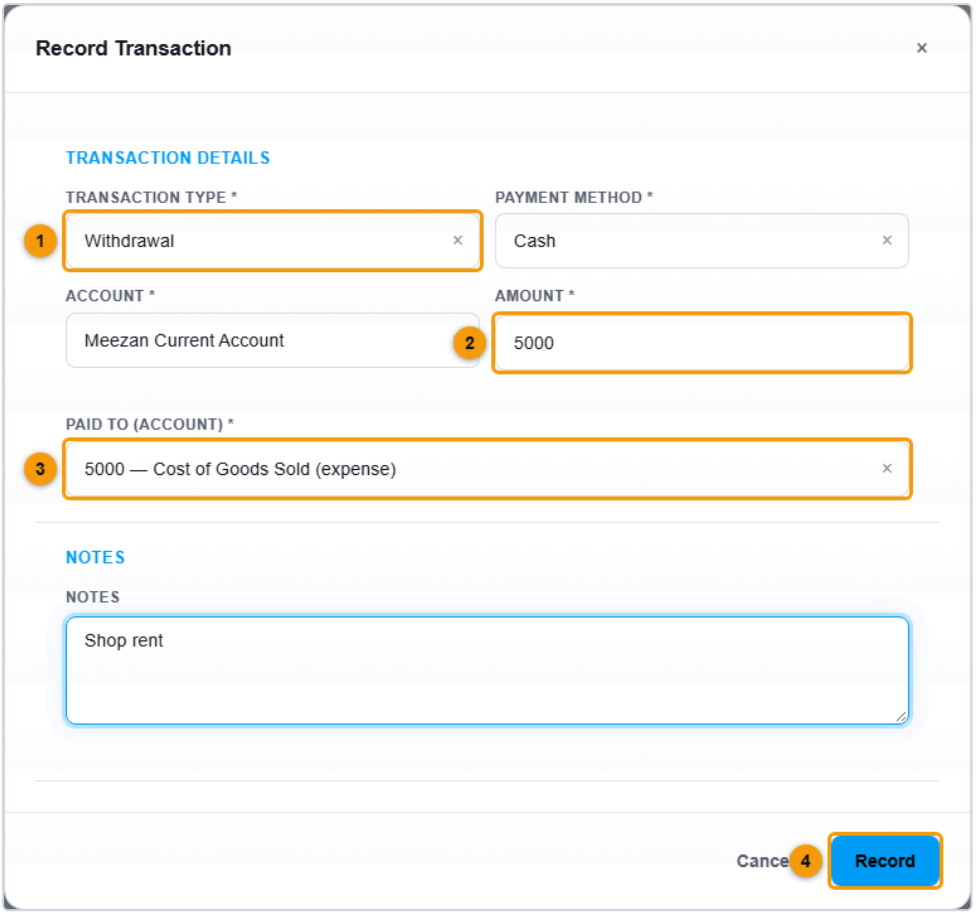
Type (1), method (2), account (3), amount (4), where the money came from (5) and Record (6).

3. Choose **Transaction type** (1) **Deposit**.
4. Choose the **Payment method** (2).
5. Choose the **Account** (3) that receives the money.
6. Enter the **Amount** (4).

7. Choose **Received from (account)** (5), the account the money comes from.
8. Add a note and click **Record** (6).

Record a withdrawal

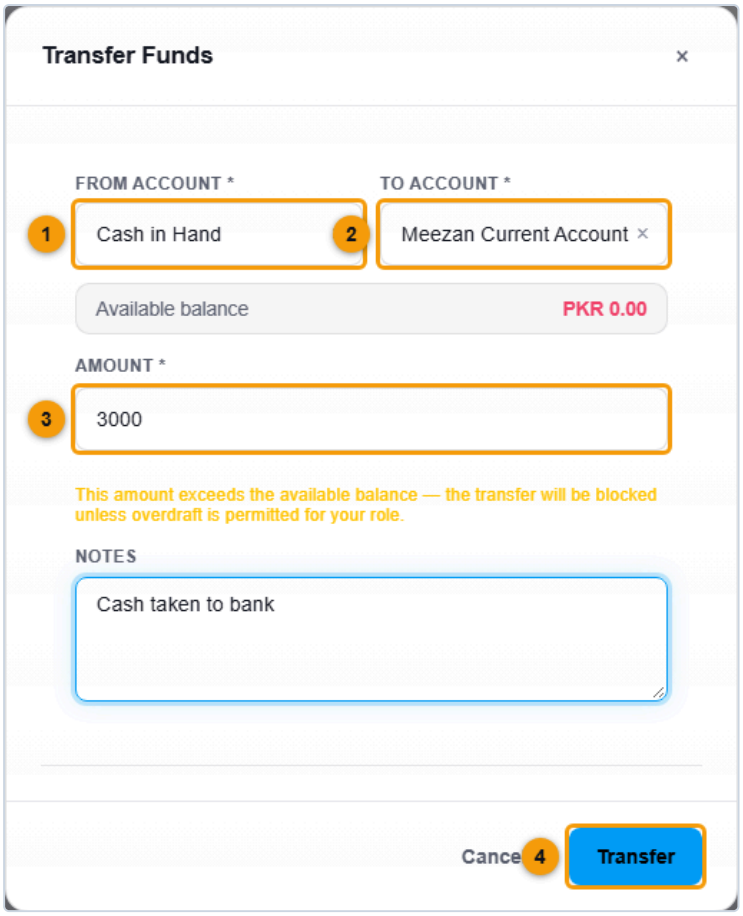
Do the same, but choose **Withdrawal** as the type. The last box becomes **Paid to (account)**. Choose the account the money was spent on.



A withdrawal asks where the money was paid to.

Move money between your accounts

1. Click **Transfer funds**.

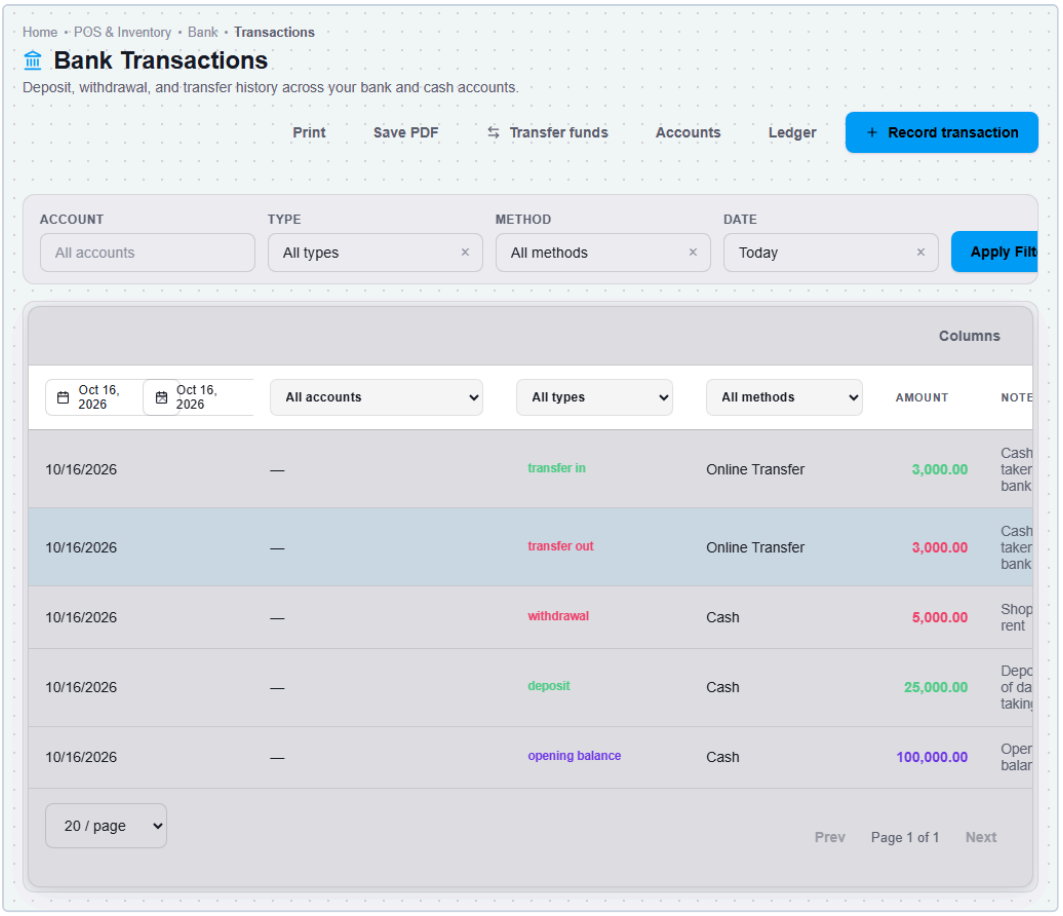


From account (1), to account (2), amount (3) and Transfer (4).

2. Choose the **From account** (1) and the **To account** (2).
3. Enter the **Amount** (3) and click **Transfer** (4).

What happens next

The transaction appears in the list with its type, account and amount. Both balances update.



Deposits, withdrawals and transfers.

Related guides

- Cheques
- Bank and cash accounts

Move money between your own accounts (Contra voucher)

Move cash into the bank, or bank money into the cash drawer, with a Contra voucher.

Plan: Business and above

What this does

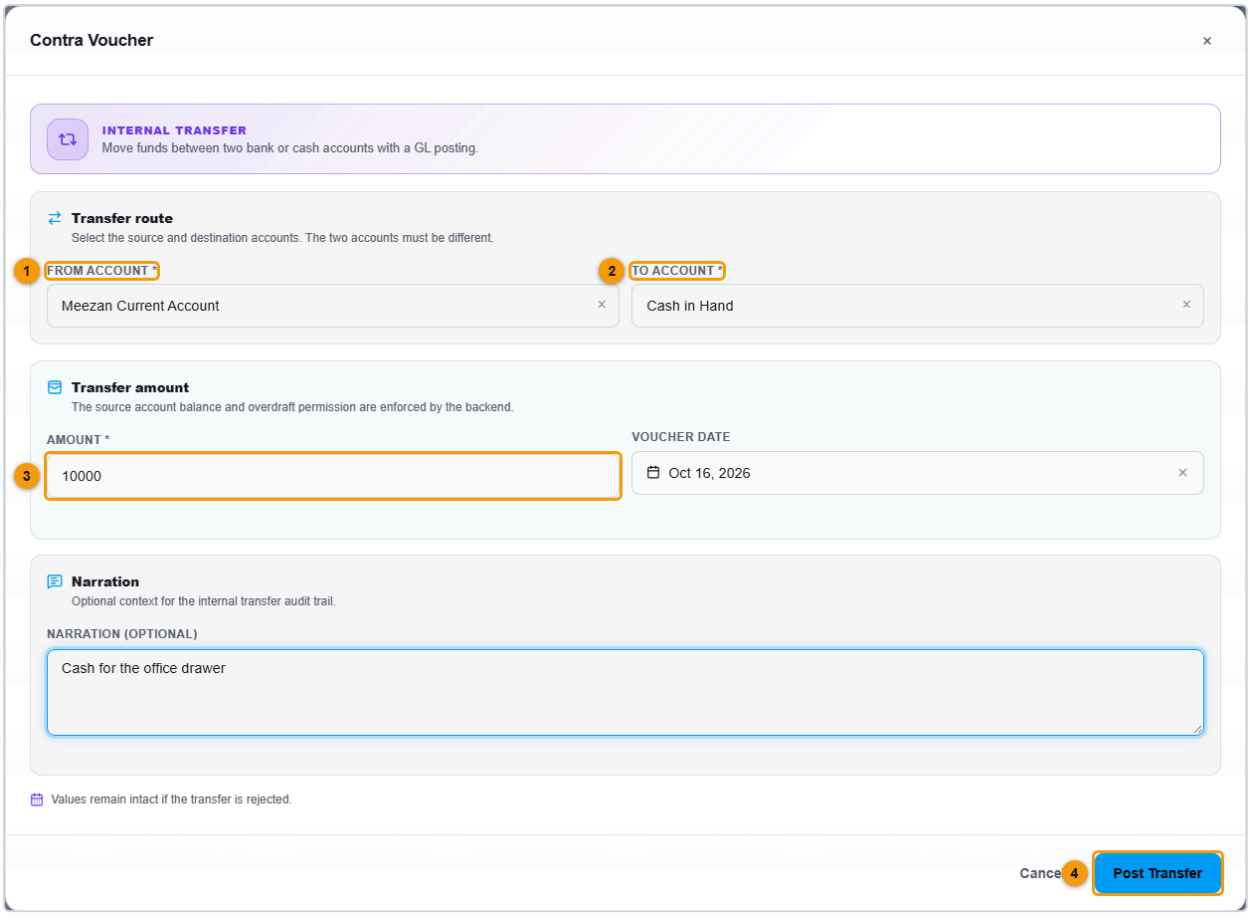
A Contra voucher moves money between two of your own bank or cash accounts, for example from the cash drawer to the bank. It is not income and not an expense, so it does not change your profit.

Before you start

- Create the accounts first. See Bank and cash accounts. A cash account called **Cash in Hand** already exists.
- The two accounts must be different.

Steps

1. Open **Finance**, then **Voucher**, and click **Contra**.
2. Choose the **From account** (1), where the money is now.
3. Choose the **To account** (2), where the money goes. The list shows the **Balance** of each account.
4. Type the **Amount** (3). Check the **Voucher date**.
5. Add a **Narration**, for example *Cash for the office drawer*.
6. Click **Post Transfer** (4).



From account (1), to account (2), amount (3) and Post Transfer (4).

What happens next

The voucher is posted with a number such as **CV-000002**. The amount leaves the first account and arrives in the second. Both movements appear in the Ledger reports and in the Bank ledger.

Important notes

- If the **From account** does not hold enough, NEXTOREx shows a warning. The transfer is blocked unless your role allows an overdraft.
- Posted vouchers cannot be edited. To undo a transfer, reverse the voucher.

Related guides

- Vouchers and journal entries
- Bank transactions

Cheques

Record a cheque you received or issued, then mark it cleared or bounced.

Plan: Business and above

What this does

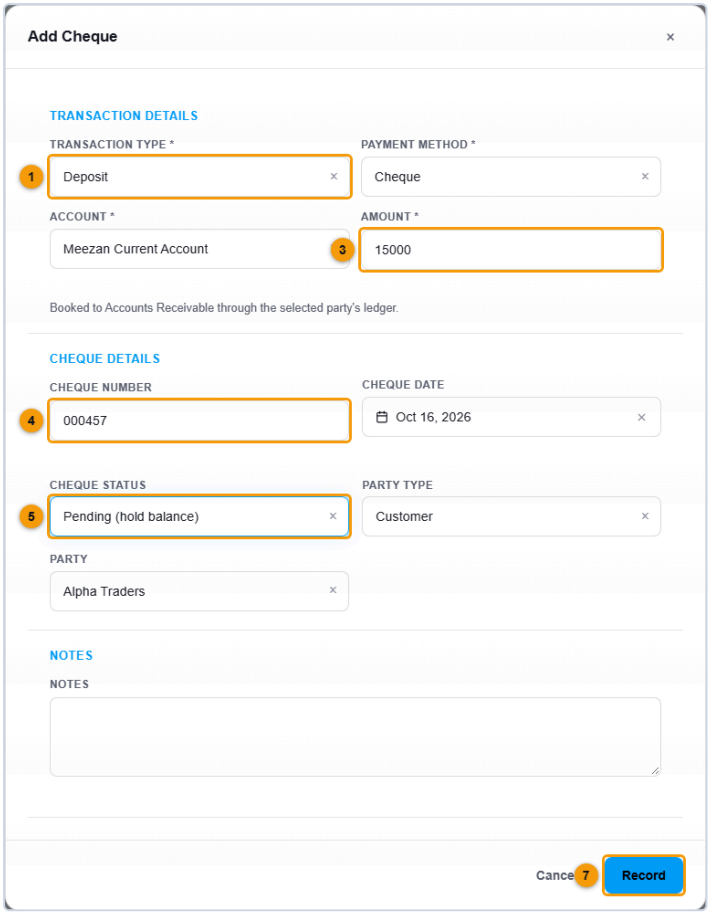
A cheque does not move money until the bank clears it. NEXTOREx lets you record the cheque as **Pending** and apply the money only when it clears. If the bank returns it, you mark it as bounced.

Before you start

- Add the bank account the cheque belongs to.

Record a cheque

1. Open **Finance**, then **Cheque**.
2. Click **Add Cheque**.



Type, account, amount, cheque number and status.

3. Choose **Transaction type**: **Deposit** for a cheque you received, **Withdrawal** for one you issued. The payment method is set to **Cheque**.
4. Choose the **Account** and enter the **Amount**.

5. Choose the other account in **Received from (account)** or **Paid to (account)**. For a cheque from a customer for an invoice, choose *Accounts Receivable*.
6. Enter the **Cheque number** and **Cheque date**.
7. Choose the **Cheque status**: **Pending (hold balance)** if the cheque has not cleared yet, or **Cleared (apply now)**.
8. Choose the **Party type** and **Party**. NEXTOREx will not save the cheque without them.
9. Click **Record**.

Clear or bounce a cheque

1. In the **Cheque** list, right-click the cheque.
2. Choose **Clear cheque** when the bank has cleared it. Confirm the message. The money is then applied to the account balance.
3. Choose **Mark as bounced** if the bank returned it.

The **Due & Overdue** tab is for cheques that are waiting to clear.

Important notes

- A pending cheque is held back from the balance until you clear it.

Related guides

- Bank and cash accounts
- Deposits, withdrawals and transfers

Reverse a voucher

Correct a posted voucher by reversing it. NEXTOREx posts an opposite entry and keeps the original.

Plan: Business and above

What this does

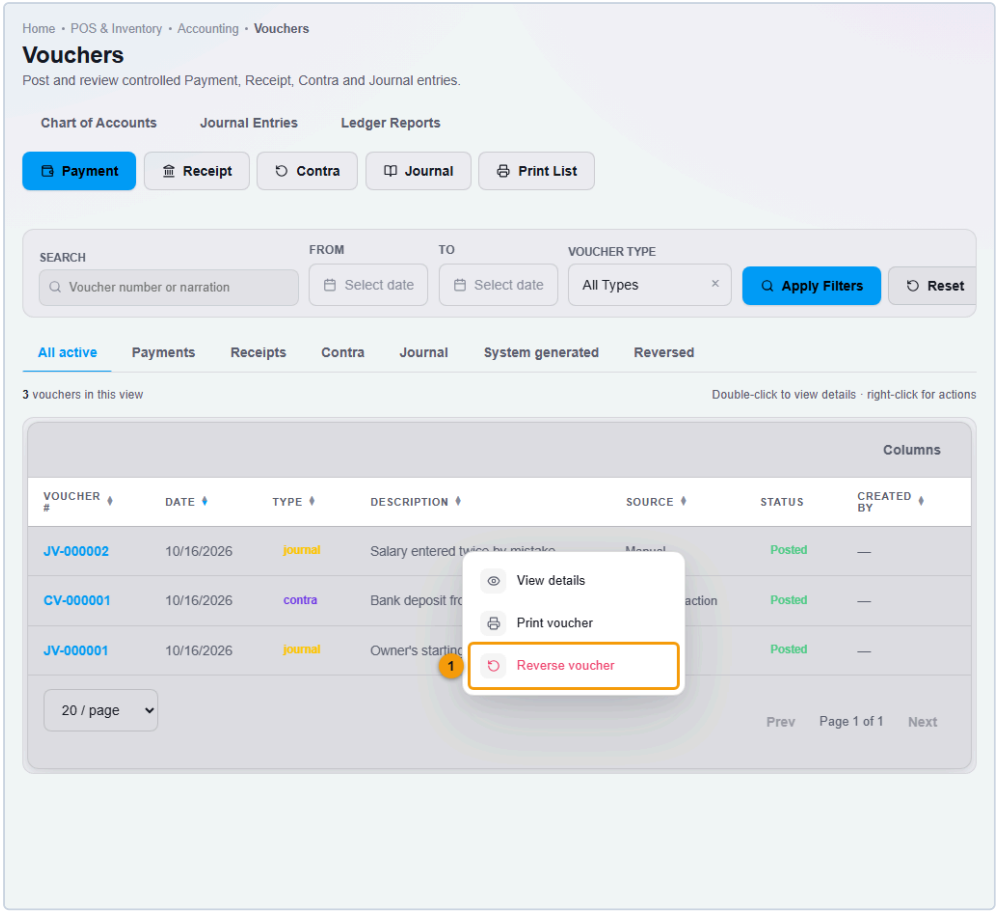
A posted voucher is never edited or deleted. If it is wrong, you reverse it. NEXTOREx posts a new voucher with the debits and credits swapped, and marks the original as **Reversed**. Then you post the correct voucher.

Before you start

You need permission to reverse vouchers. Know the voucher you want to reverse.

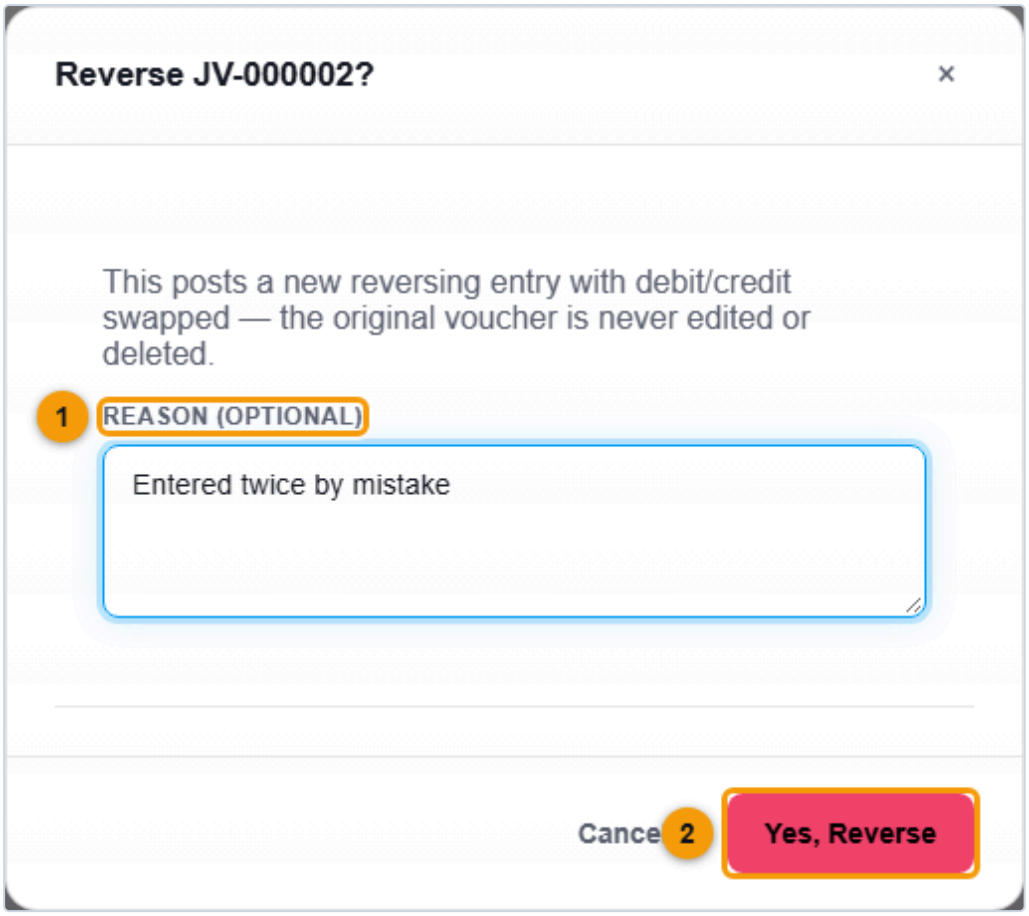
Steps

1. Open **Finance**, then **Voucher**.
2. Right-click the voucher in the list.



Reverse voucher (1).

3. Choose **Reverse voucher** (1).
4. Type a **Reason** (1) if you want to. It becomes part of the new voucher's narration.
5. Click **Yes, Reverse** (2).

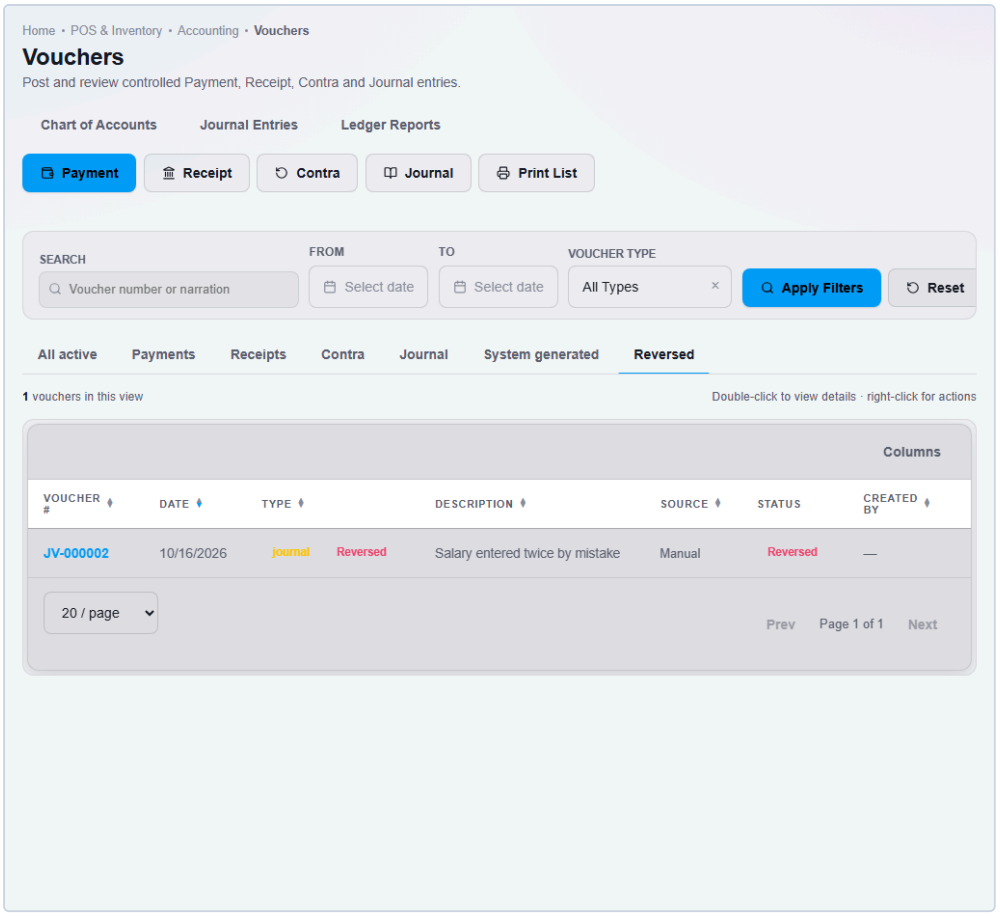


Reason (1) and Yes, Reverse (2).

You can also open the voucher and click **Reverse** at the bottom of the details window.

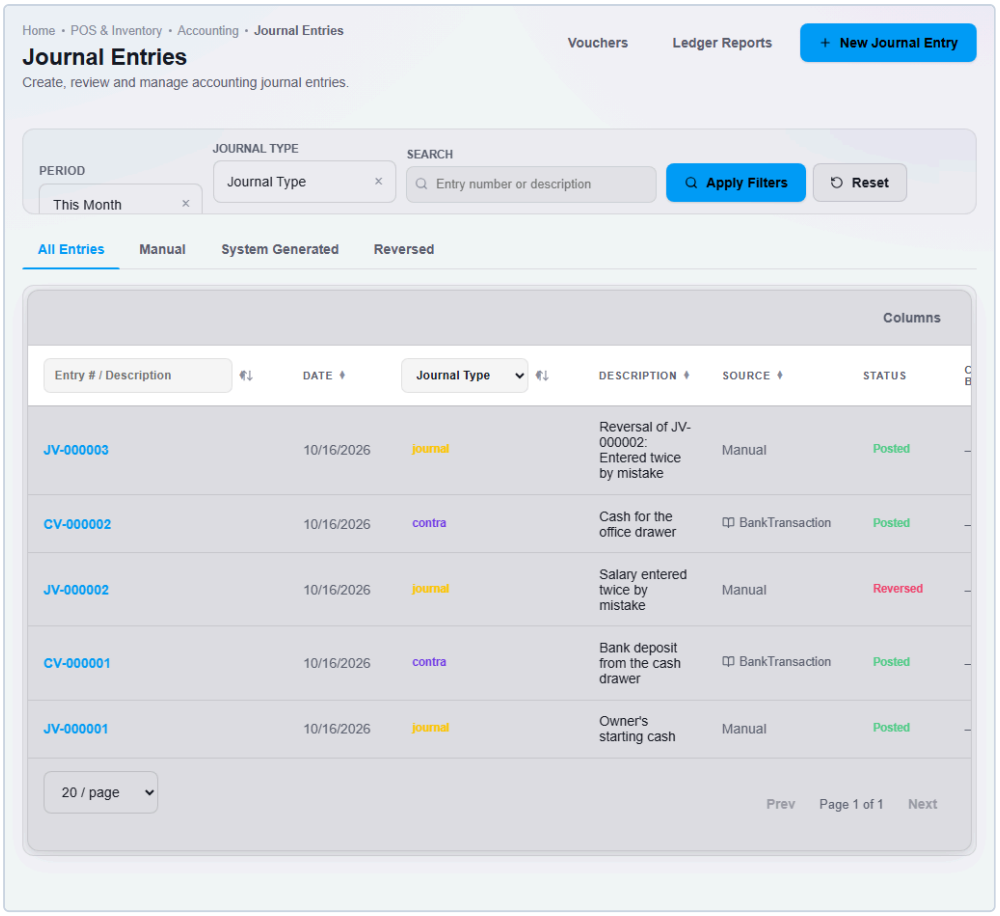
What happens next

- The original voucher, for example **JV-000002**, gets the status **Reversed**.
- A new voucher, for example **JV-000003**, is posted with the narration *Reversal of JV-000002*, followed by your reason.
- Open the **Reversed** tab to see all reversed vouchers.



Reversed vouchers stay on record.

- **Journal Entries** lists both the original and the reversal, so the history is complete.



The original is marked Reversed and the reversal is posted.

After reversing, post the correct voucher.

Important notes

- A reversal does not delete anything. The full history stays in your records for your accountant and auditors.

Related guides

- Post a journal voucher
- Vouchers and journal entries

Customer and supplier ledgers

See what each customer owes you and what you owe each supplier, with a statement of every transaction.

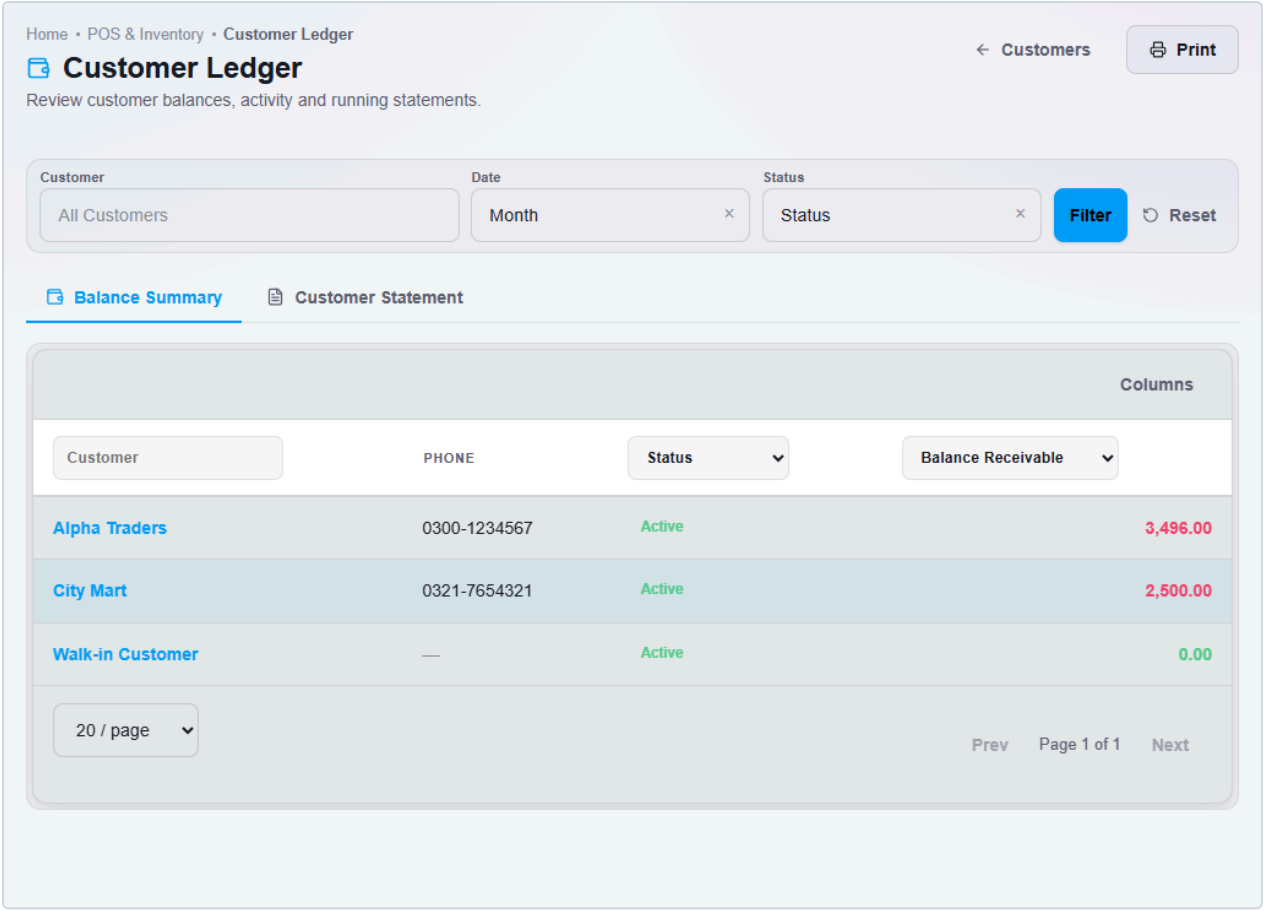
Plan: Starter and above

What this does

A ledger shows, for one customer or supplier, every amount added to their balance and every payment that reduced it. The balance summary lists everyone at once.

Customer Ledger

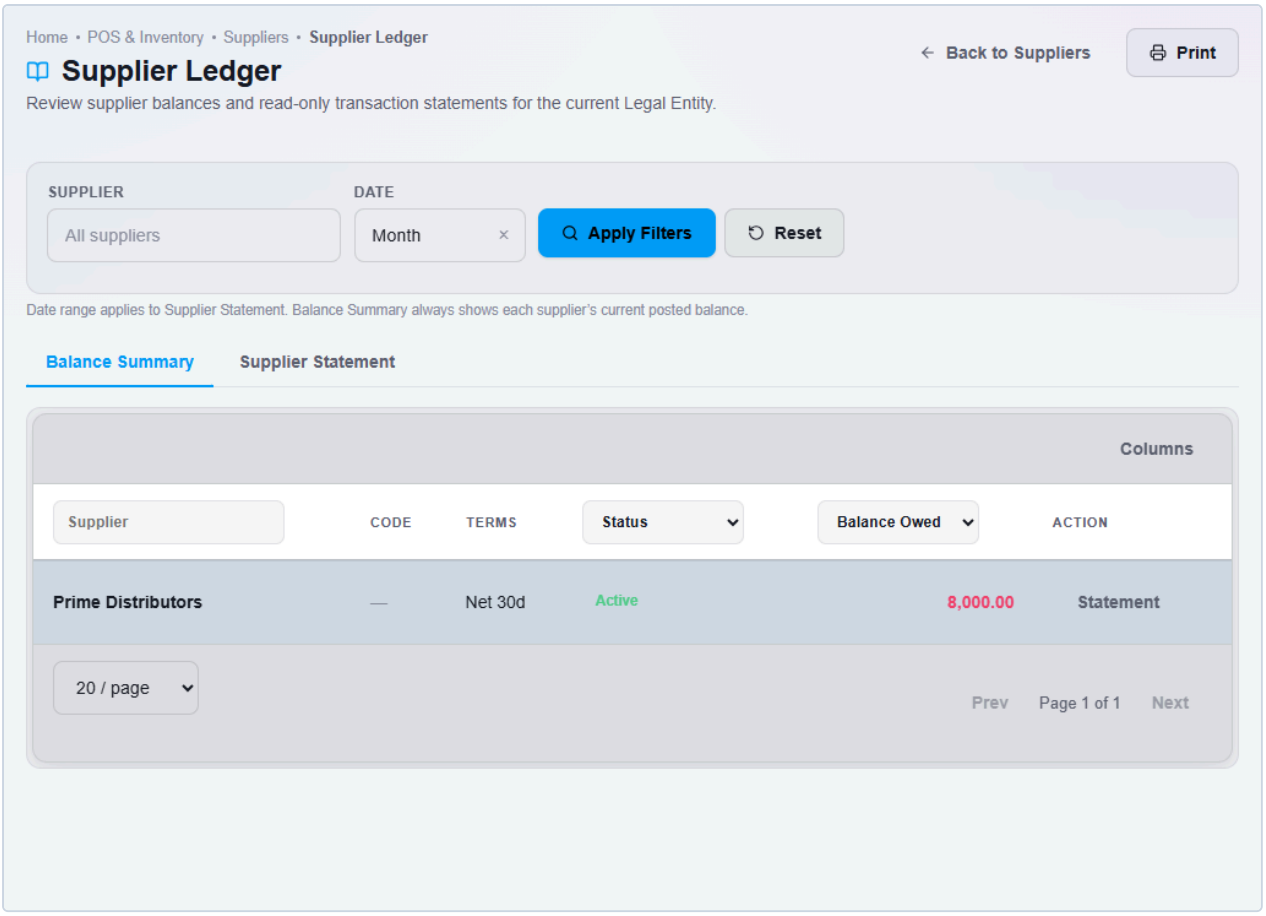
1. Open **Customer**, then **Ledger**.
2. The **Balance Summary** tab lists each customer with their **Balance Receivable**, the amount they owe you. Use the filters to choose a customer, a date range or a status.
3. Open the **Customer Statement** tab to see the detailed transactions for one customer.
4. Click **Print** to print what you are viewing.



Balance receivable for each customer.

Supplier Ledger

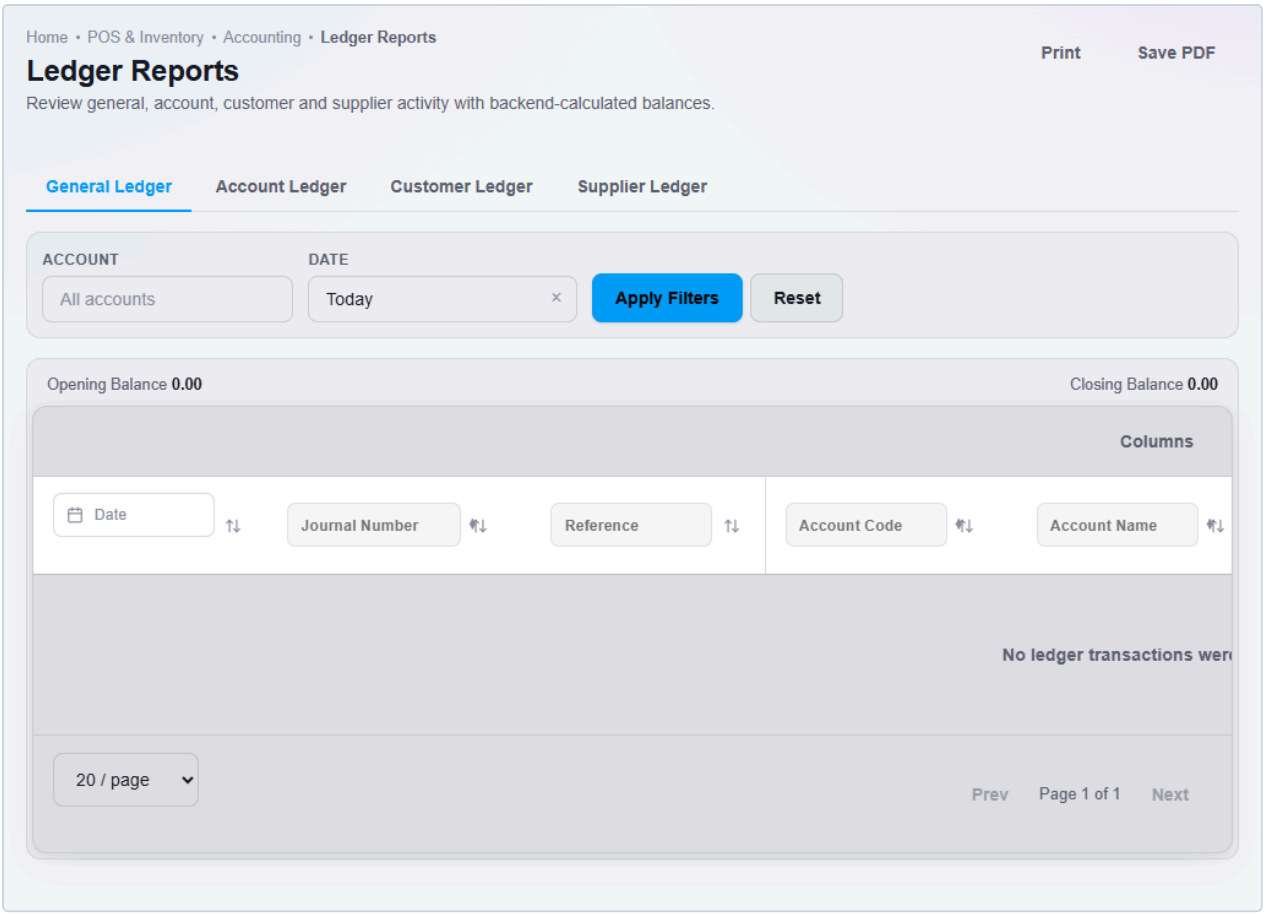
1. Open **Supplier**, then **Ledger**.
2. The **Balance Summary** tab lists each supplier with their **Balance Owed**.
3. Click **Statement** next to a supplier, or open the **Supplier Statement** tab, for the detailed transactions.



Balance owed to each supplier.

Ledger Reports

For a ledger across all accounts, open **Finance**, then **Ledger Reports**. It has four tabs: **General Ledger**, **Account Ledger**, **Customer Ledger** and **Supplier Ledger**. You can print the page or save it as a PDF.



Ledger Reports.

What happens next

Balances change as you sell, buy and record payments. See Receive a customer payment and Pay a supplier.

Related guides

- Receive a customer payment
- Aging report

Ledger reports

Read the General Ledger and the ledger of a single account to see every posting and the running balance.

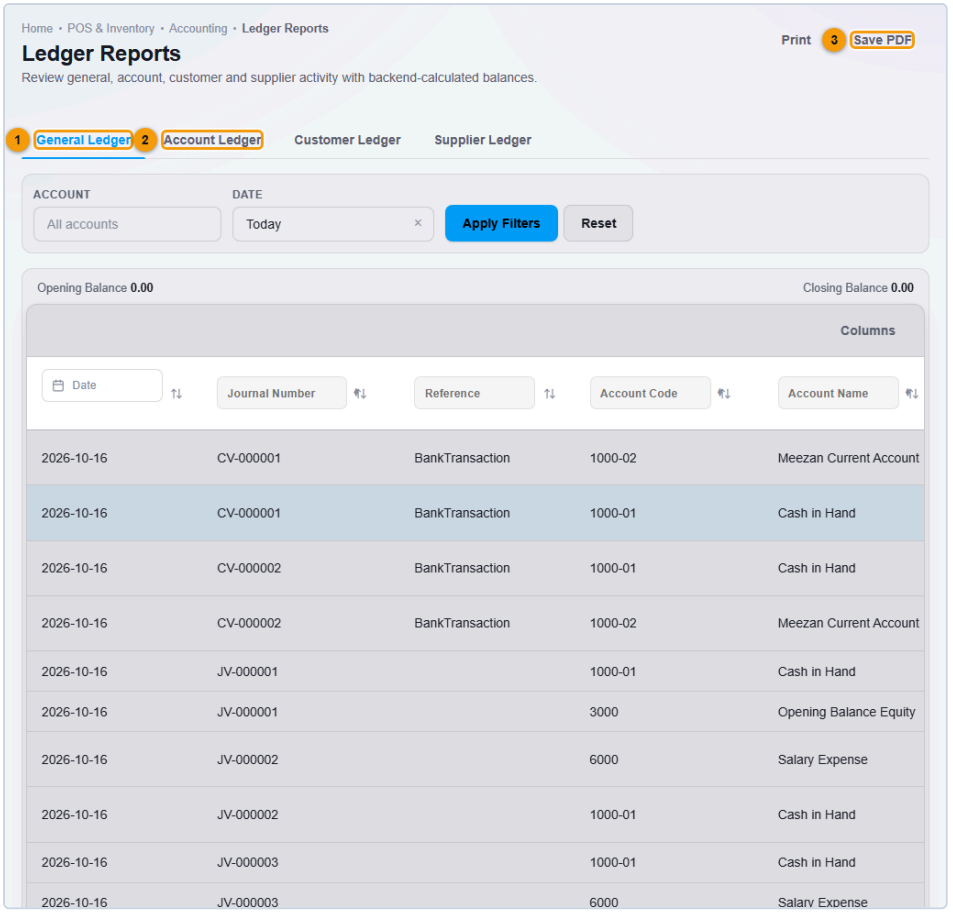
Plan: Business and above

What this does

Ledger Reports show every posting made to your accounts, with a running balance. Use them to find out how an account got to its balance.

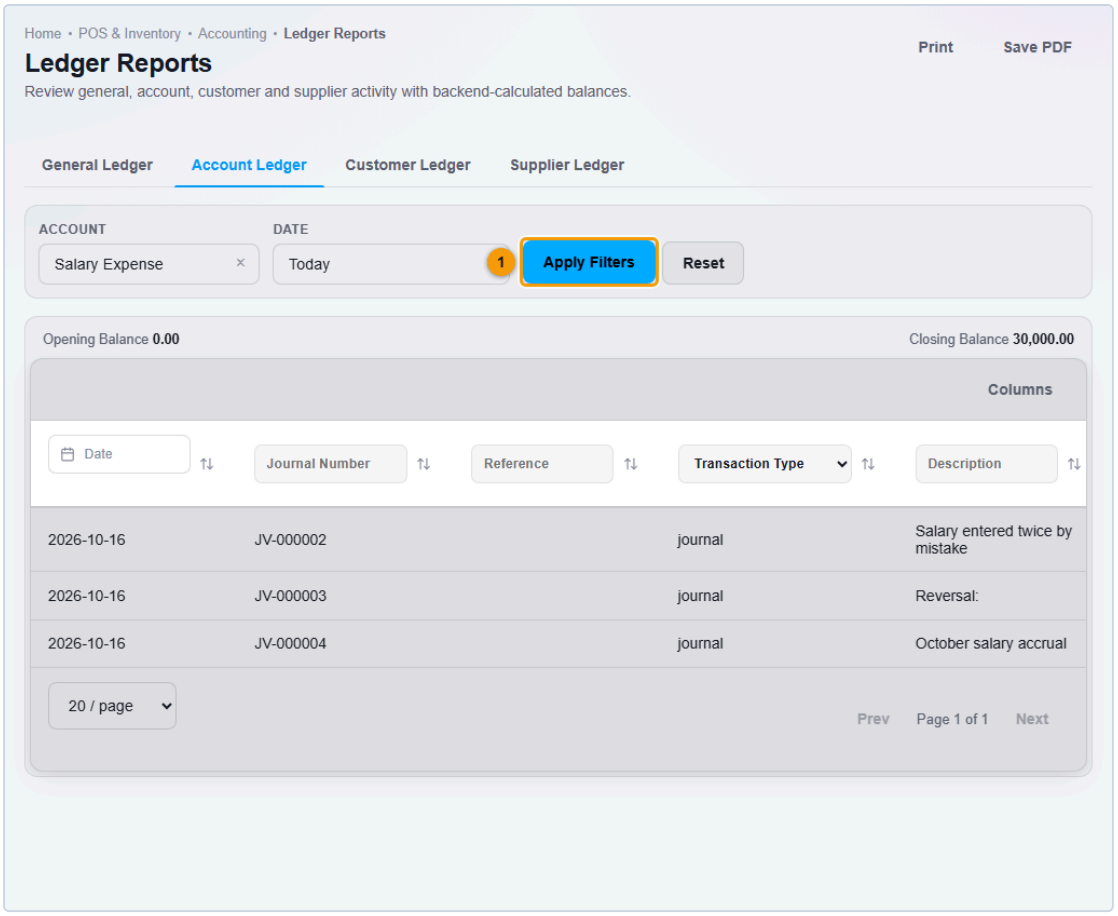
Steps

1. Open **Finance**, then **Voucher**, and click **Ledger Reports**. You can also open it from **Chart of Accounts** or **Journal Entries**.
2. Choose a tab: **General Ledger**, **Account Ledger**, **Customer Ledger** or **Supplier Ledger**.



The tabs (1 and 2) and Save PDF (3).

3. For **General Ledger**, set the date range and click **Apply Filters** to see the postings of all accounts.
4. For **Account Ledger**, choose the **Account** and click **Apply Filters** (1).



Choose the account, then Apply Filters (1).

5. Read the **Opening Balance** and **Closing Balance** at the top. Each row shows the date, the voucher number, the source, the account, the description, the debit, the credit and the running balance.
6. Use **Print** or **Save PDF** to keep a copy.

What happens next

Rows from a reversed voucher show the status **Reversed**, and the reversing voucher is a separate row. The status filter lets you show **Posted** or **Reversed** rows.

Important notes

- Customer and supplier statements are explained in Customer and supplier ledgers.
- There is no separate Trial Balance screen in NEXTOREx. Use the General Ledger and the Balance Sheet.

Related guides

- Post a journal voucher
- Chart of Accounts

How opening stock is recorded in your accounts

What your accounts show when you enter opening stock: Inventory goes up and Opening Balance Equity goes up, and your profit is not affected.

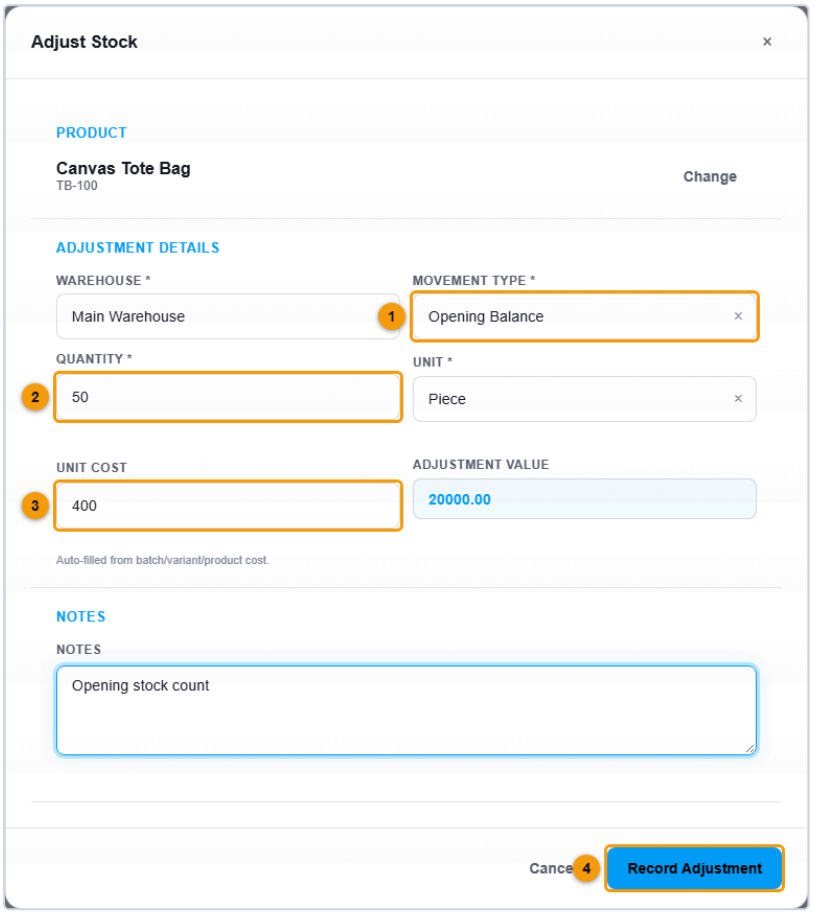
Plan: Business and above

What this does

When you start using NEXTOREx you already own stock. You enter it as an **Opening Balance** stock adjustment. This guide shows what that does to your accounts, so you can explain it to your accountant.

Steps

1. Open **Stock**, then **Stock Adjustment**, and click **Create adjustment**.
2. Choose the product and the warehouse.
3. Choose the **Movement type Opening Balance** (1).
4. Enter the **Quantity** (2) and the **Unit cost** (3).
5. Click **Record Adjustment** (4).



Movement type (1), quantity (2), unit cost (3) and Record Adjustment (4).

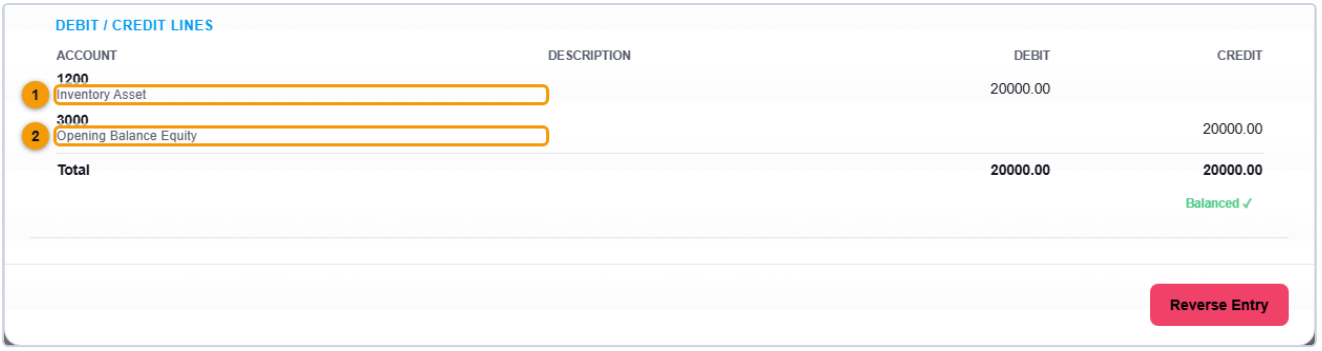
The full steps are in Stock adjustments and opening stock.

What happens in your accounts

NEXTOREx posts one system journal entry for the adjustment:

Account	Debit	Credit
Inventory Asset	quantity × unit cost	
Opening Balance Equity		quantity × unit cost

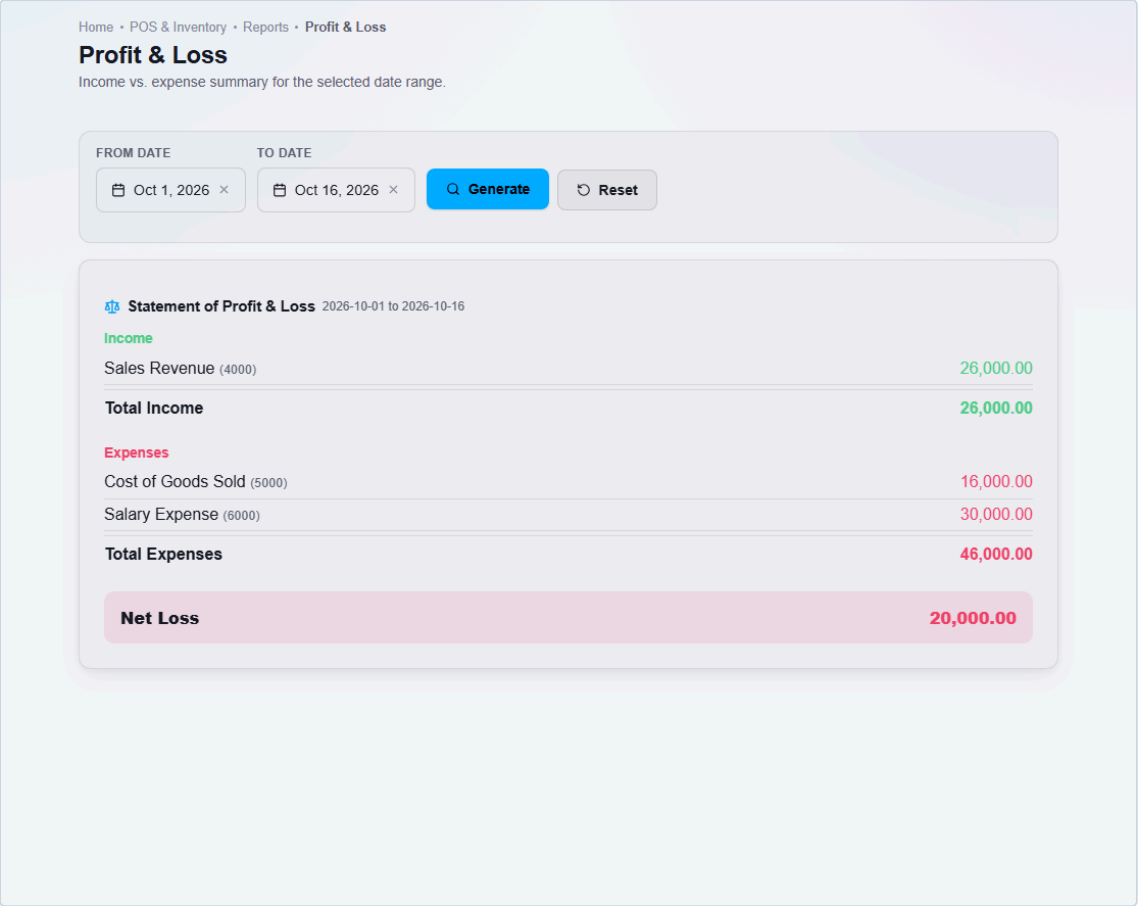
For 50 bags at 400, that is 20,000 debit to **Inventory Asset** and 20,000 credit to **Opening Balance Equity**. Open **Journal Entries** and double-click the entry. It is marked as system generated and linked to the stock movement.



Inventory Asset (1) and Opening Balance Equity (2).

Opening stock is not profit

Opening stock is something you already owned. It is recorded as an asset and as equity, not as income. It does not appear in your Profit and Loss report. It does appear in your Balance Sheet, under Assets (Inventory Asset) and under Equity (Opening Balance Equity).



Profit comes from sales and expenses. Opening stock is not in it.

Important notes

- Use **Opening Balance** only for the stock you already had on your start date. For a later stock count correction, use **Adjustment In** or **Adjustment Out**.
- A posted entry cannot be edited. To correct a wrong opening quantity, record another adjustment, and ask your accountant before you reverse the entry.

Related guides

- Stock adjustments and opening stock
- Balance Sheet

Profit and Loss report

See your income, costs and profit for any period.

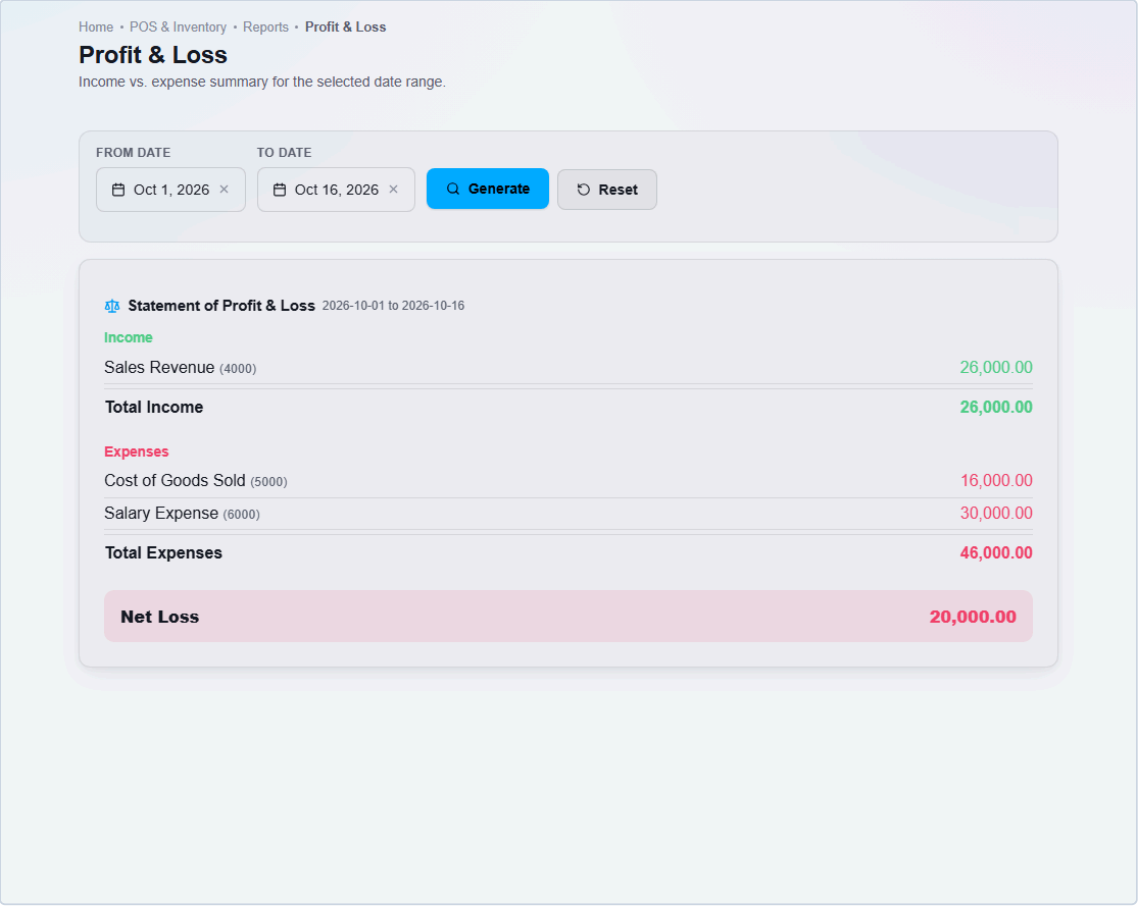
Plan: Business and above

What this does

The Profit & Loss report adds up your income and your expenses for a period and shows the difference: your net profit.

Steps

1. Open **Reports**, then **Profit & Loss**.
2. Choose the **From date** and **To date**.
3. Click **Generate**.



Income, expenses and net profit for the period.

What happens next

The report lists each income account (such as **Sales Revenue**) and each expense account (such as **Cost of Goods Sold**), with totals and the **Net Profit**. Click **Reset** to return to the default dates.

Important notes

- Opening stock that you enter as an **Opening Balance** stock adjustment is not part of your profit. It is recorded as Inventory (an asset) and Opening Balance Equity. See How opening stock is recorded.
- The report counts only what is posted in the dates you choose.

Related guides

- Balance Sheet
- How opening stock is recorded

Balance Sheet

See what you own, what you owe and your equity on any date.

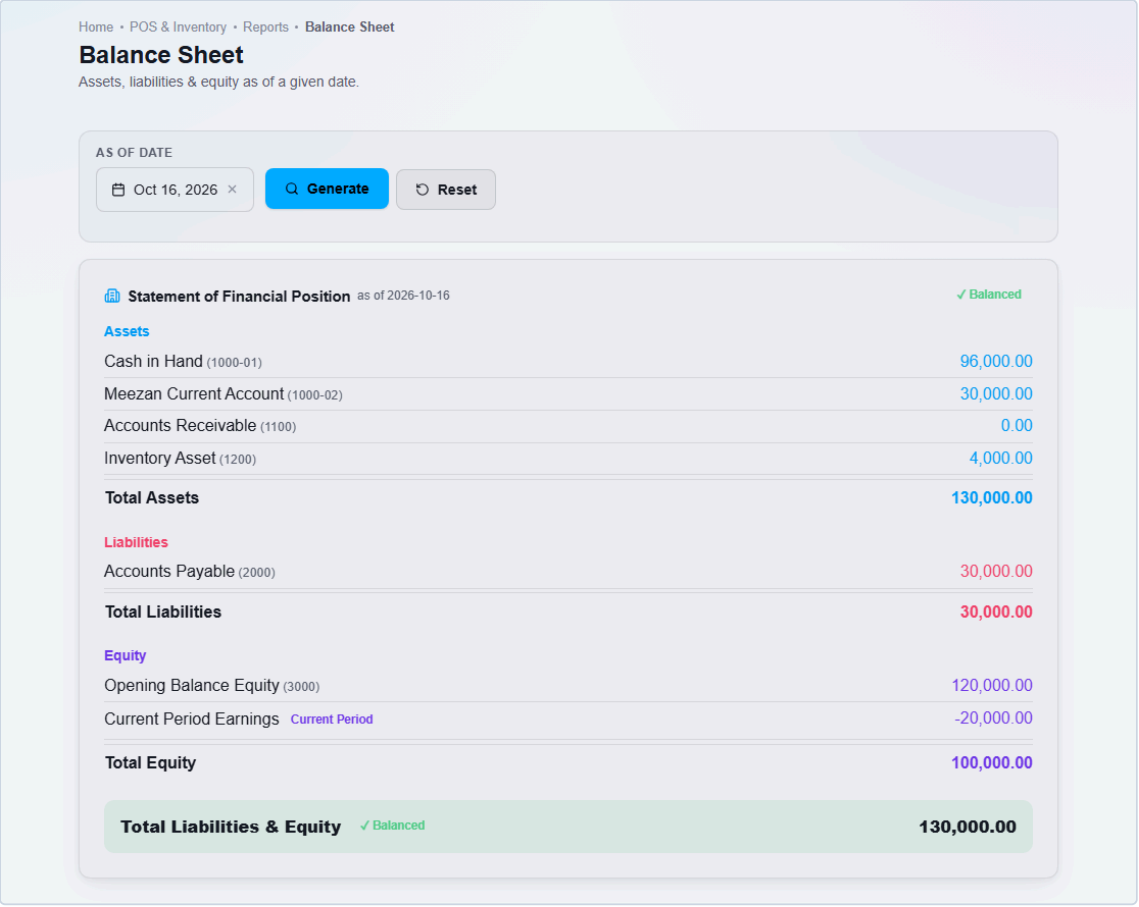
Plan: Business and above

What this does

The Balance Sheet shows your **Assets** (what you own, such as cash, money customers owe you and stock), your **Liabilities** (what you owe, such as supplier balances and sales tax payable) and your **Equity** on one date.

Steps

1. Open **Reports**, then **Balance Sheet**.
2. Choose the **As of date**.
3. Click **Generate**.



Assets, liabilities and equity.

What happens next

The report lists each account with its balance and shows totals. A green **Balanced** mark appears when total assets equal total liabilities plus equity.

Important notes

- Sales tax you charged on sales orders is shown as a liability (**Sales Tax Payable**), not as part of your sales revenue.
- Profit for the current period is shown as **Current Period Earnings** under Equity.

Related guides

- Profit and Loss report
- Aging report

Aging report

See which customers owe you money and which suppliers you owe, grouped by how overdue the amounts are.

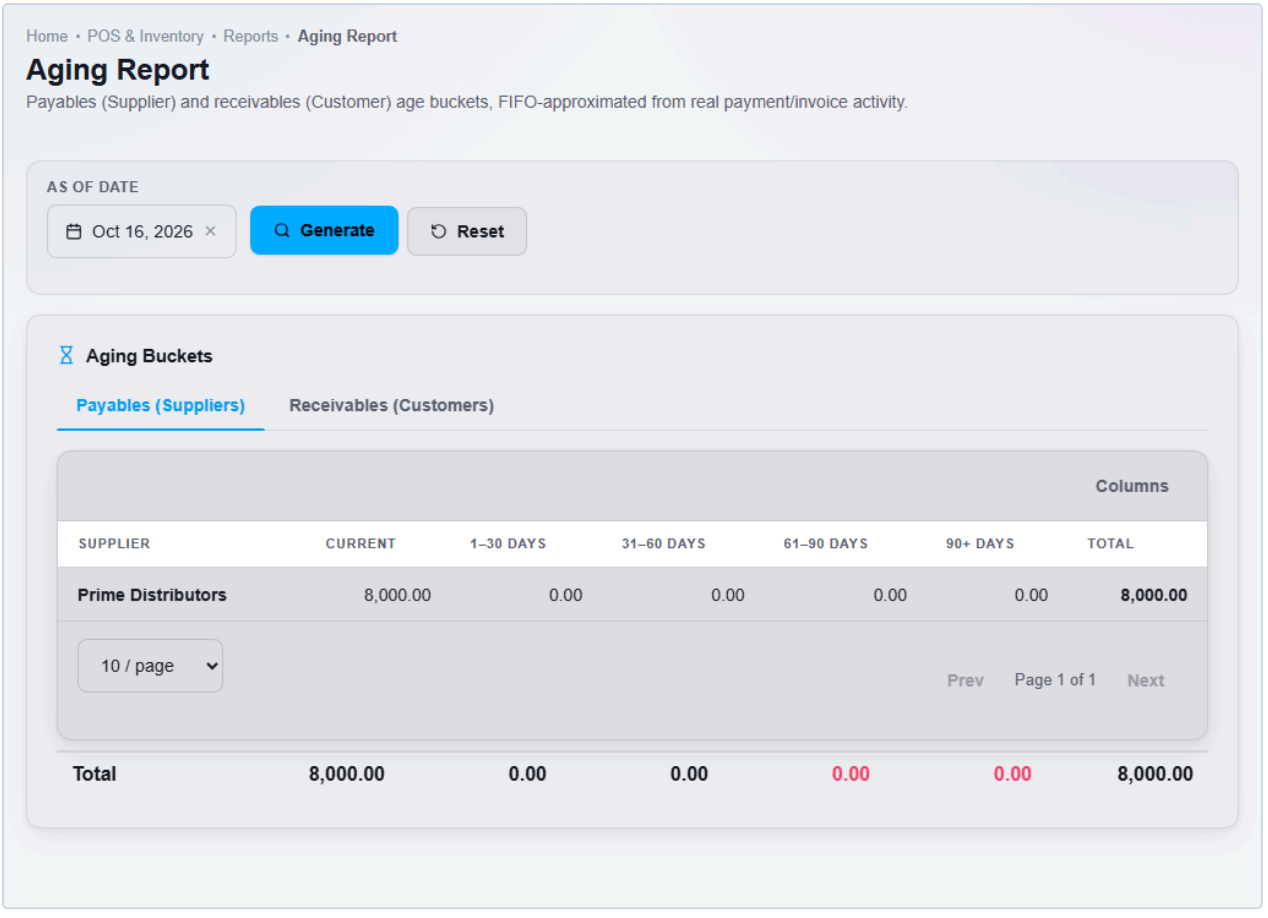
Plan: Business and above

What this does

The Aging report groups unpaid amounts by age: **Current**, **1 to 30 days**, **31 to 60 days**, **61 to 90 days** and **90+ days**. It helps you decide who to chase for payment and which supplier bills are due.

Steps

1. Open **Reports**, then **Aging Report**.
2. Choose the **As of date** and click **Generate**.
3. Use the **Payables (Suppliers)** tab for what you owe. Use the **Receivables (Customers)** tab for what customers owe you.



Payables and receivables by age.

Important notes

- The ages are estimated by matching payments to the oldest invoices first. Treat them as a guide and check the customer or supplier statement for exact amounts.

Related guides

- Customer and supplier ledgers

CRM

Leads, deals, tasks and appointments

Create a lead

Add a new lead to CRM with their contact details, source, status and priority.

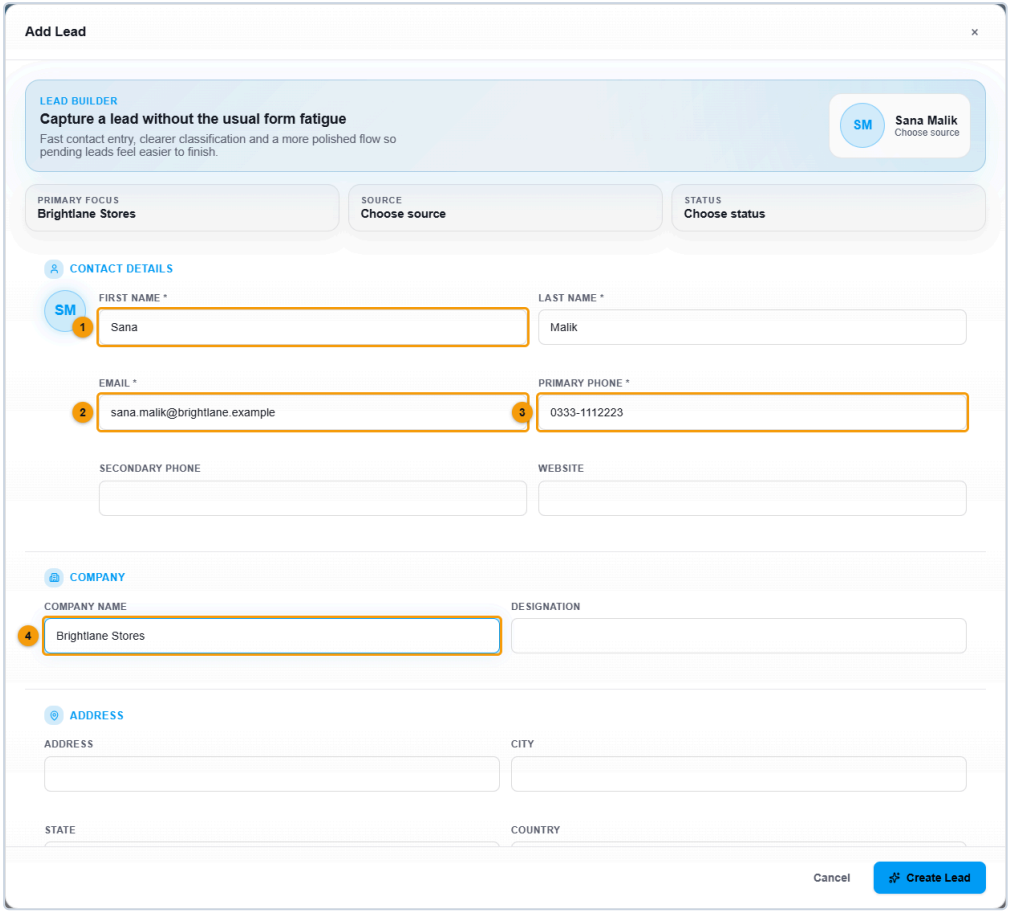
Plan: CRM Basic, Business, Pro and Agency

What this does

A lead is a person or business that may become a customer. Adding leads to CRM keeps every enquiry in one place so none are forgotten.

Steps

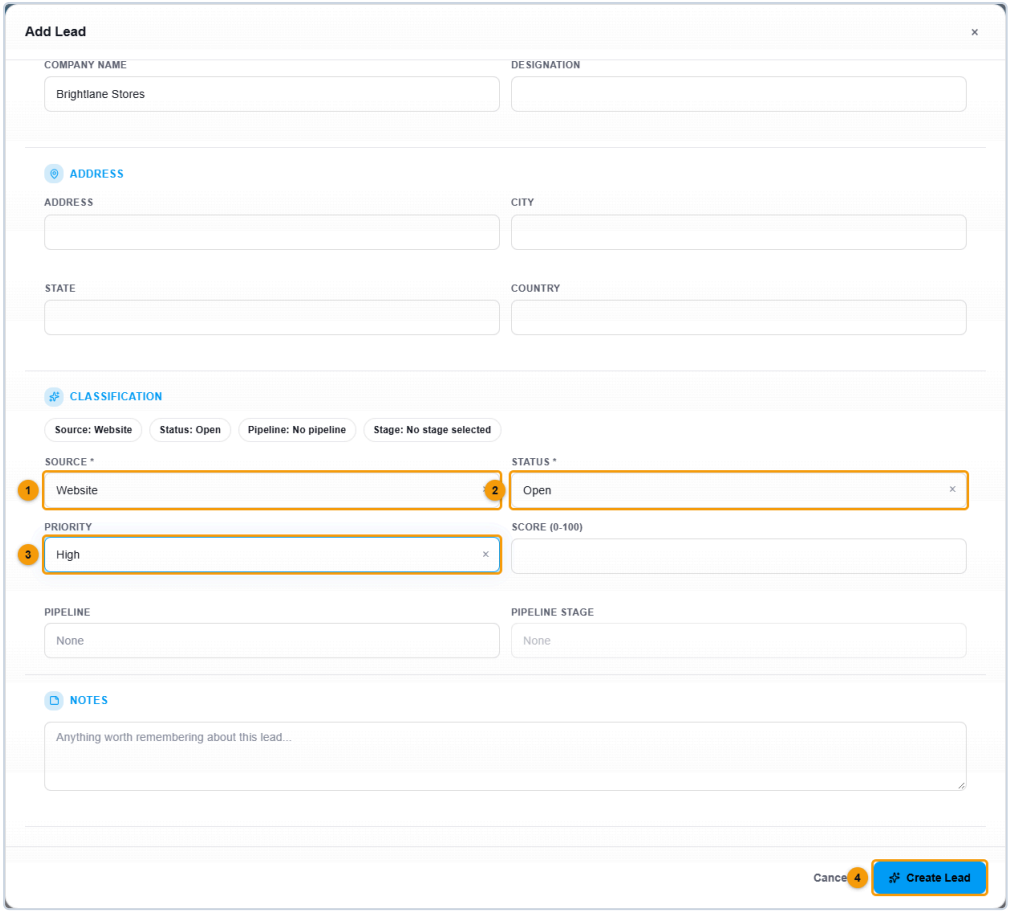
1. Open the **CRM** app. In the left menu, open **CRM**, then **Leads**, then **All Leads**.
2. Click **Add Lead**. The **Add Lead** window opens.



First name (1), email (2), phone (3) and company (4).

3. Enter the **First name** (1) and **Last name**. Both are required.
4. Enter the **Email** (2) and **Primary phone** (3). Both are required.
5. Add the **Company name** (4), designation and address if you know them.

6. Scroll down to **Classification**.

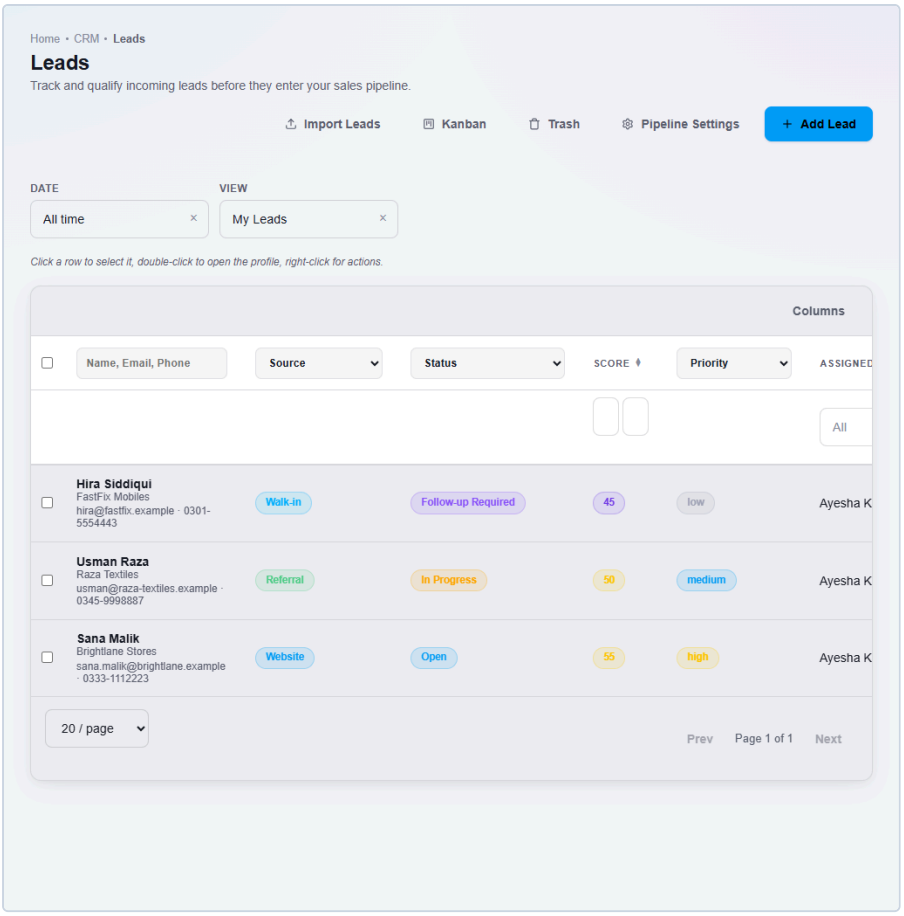


Source (1), status (2), priority (3) and Create Lead (4).

7. Choose the **Source** (1), where the lead came from, for example **Website** or **Referral**.
8. Choose the **Status** (2), for example **Open**. Optionally choose the **Priority** (3) and a **Score** from 0 to 100.
9. Add notes if you want, then click **Create Lead** (4).

What happens next

The lead appears in the **Leads** list. By default the list shows your own leads, with their source, status, score and priority.



Click a row to select it, double-click to open the profile, right-click for actions.

Important notes

- To add many leads at once, see Import leads from a CSV file.

Related guides

- The lead profile
- Import leads from a CSV file

The lead profile

Open a lead to see its details, add notes and files, assign it to a teammate and follow its history.

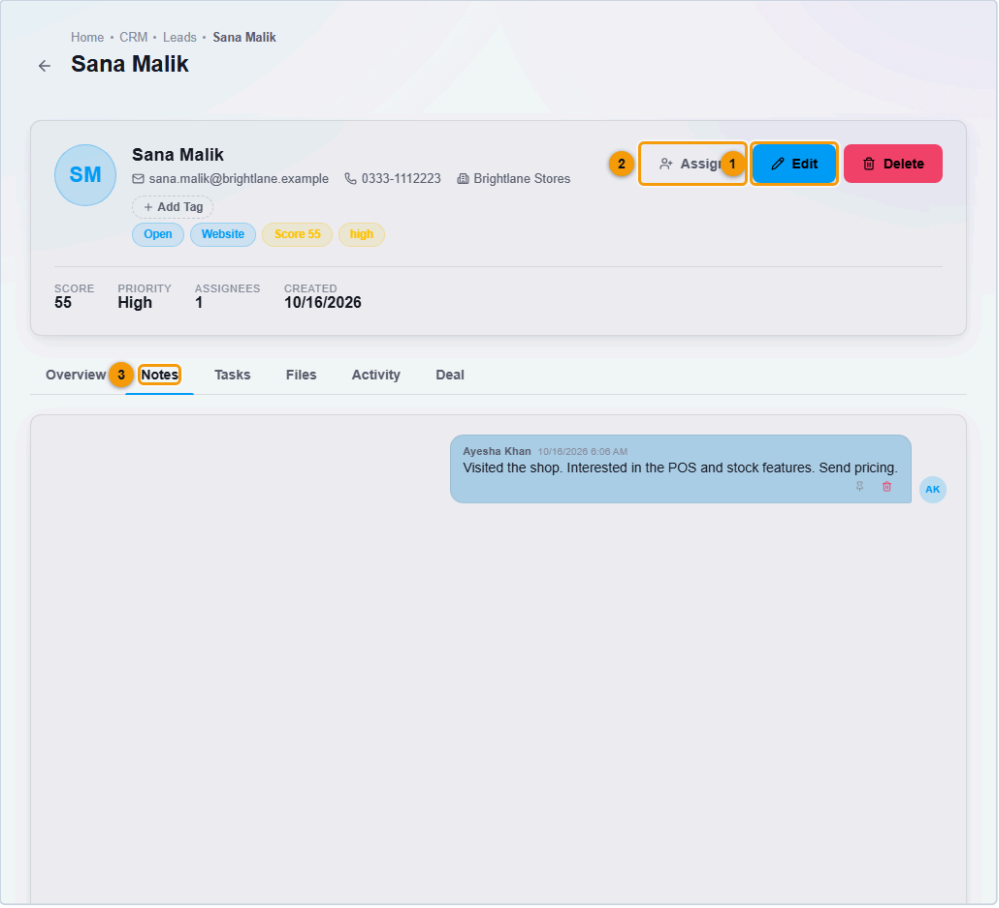
Plan: CRM Basic, Business, Pro and Agency

What this does

The lead profile is the page for one lead. It shows everything about them and keeps your notes, tasks, files and history together.

Steps

1. Open **CRM**, then **Leads**, then **All Leads**.
2. Double-click a lead to open the profile.



Edit (1), Assign (2) and the Notes tab (3).

At the top you can see the name, email, phone, company and tags such as the status, source, score and priority.

- Click **Edit** (1) to change the lead's details.
- Click **Assign** (2) to give the lead to a teammate.
- Click **Add Tag** to label the lead.
- Click **Delete** to remove the lead.

Use the tabs under the header:

- **Overview**: status, stage, pipeline, owner, company, address and assigned users.
- **Notes**: write a note and post it. Your notes show as a conversation, newest at the bottom.
- **Tasks**: things to do for this lead. See Tasks and follow-ups.
- **Files**: drag files onto the page, or click to choose them.
- **Activity**: a history of what happened, starting with *Lead was created*.
- **Deal**: the deals linked to this lead.

What happens next

Everything you add stays on the lead. Teammates who can see the lead see the same notes and tasks.

Related guides

- Create a lead
- Tasks and follow-ups
- Deals

Tasks and follow-ups

Add a task with a due date to a lead so you remember to follow up.

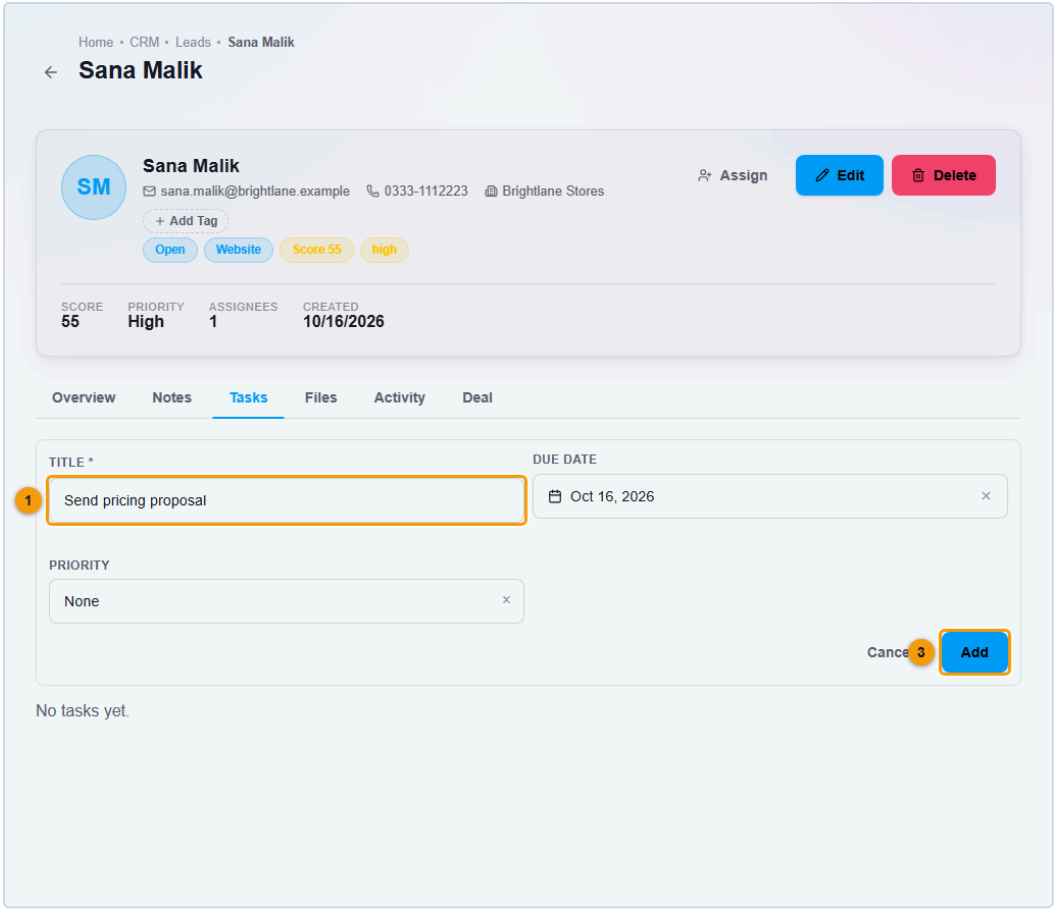
Plan: CRM Basic, Business, Pro and Agency

What this does

A task is a to-do on a lead, such as *Send pricing proposal*, with an optional due date and priority.

Steps

1. Open the lead profile and click the **Tasks** tab.
2. Click **+ Add Task**. A small form opens.

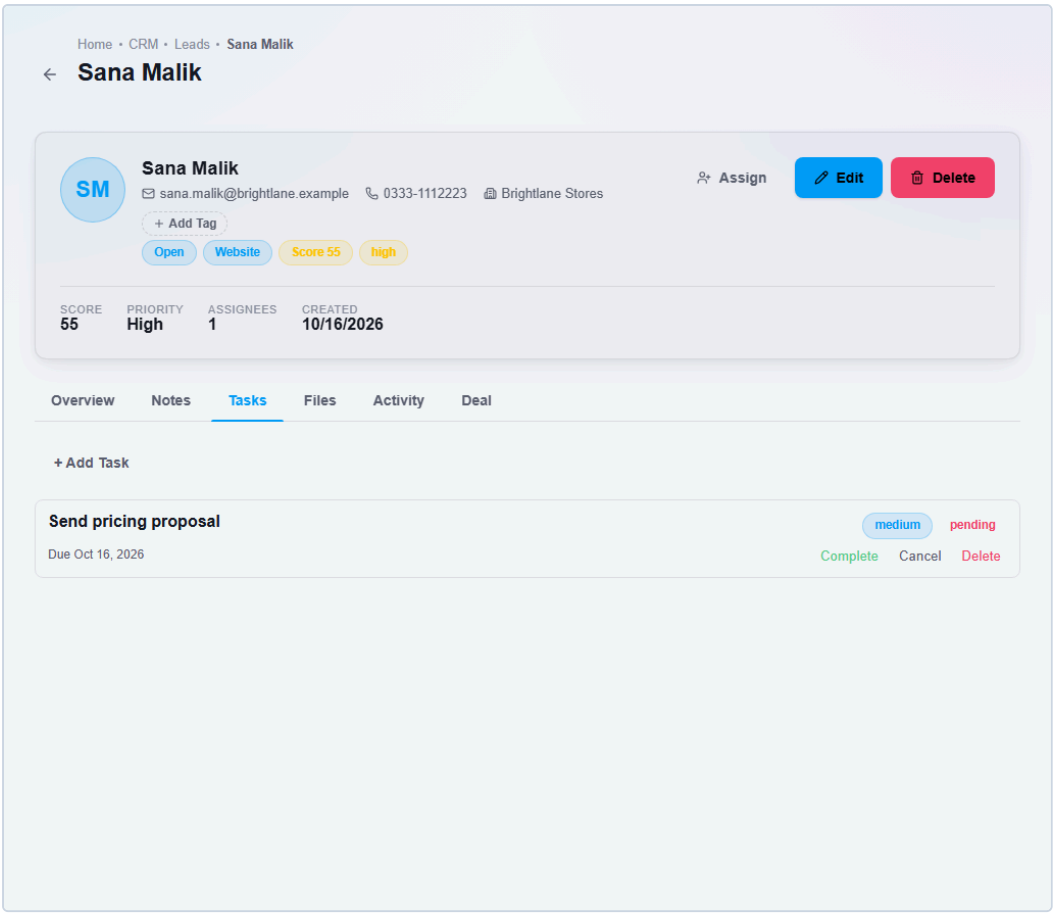


Title (1), due date (2) and Add (3).

3. Enter the **Title** (1). It is required.
4. Choose a **Due date** (2) and a **Priority**.
5. Click **Add** (3).

What happens next

The task appears in the lead's **Tasks** tab.



Tasks stay with the lead.

Important notes

- Add a due date to every task so you know when to follow up.

Related guides

- The lead profile
- Deals

Deals

Track a possible sale with its value, stage and expected close date.

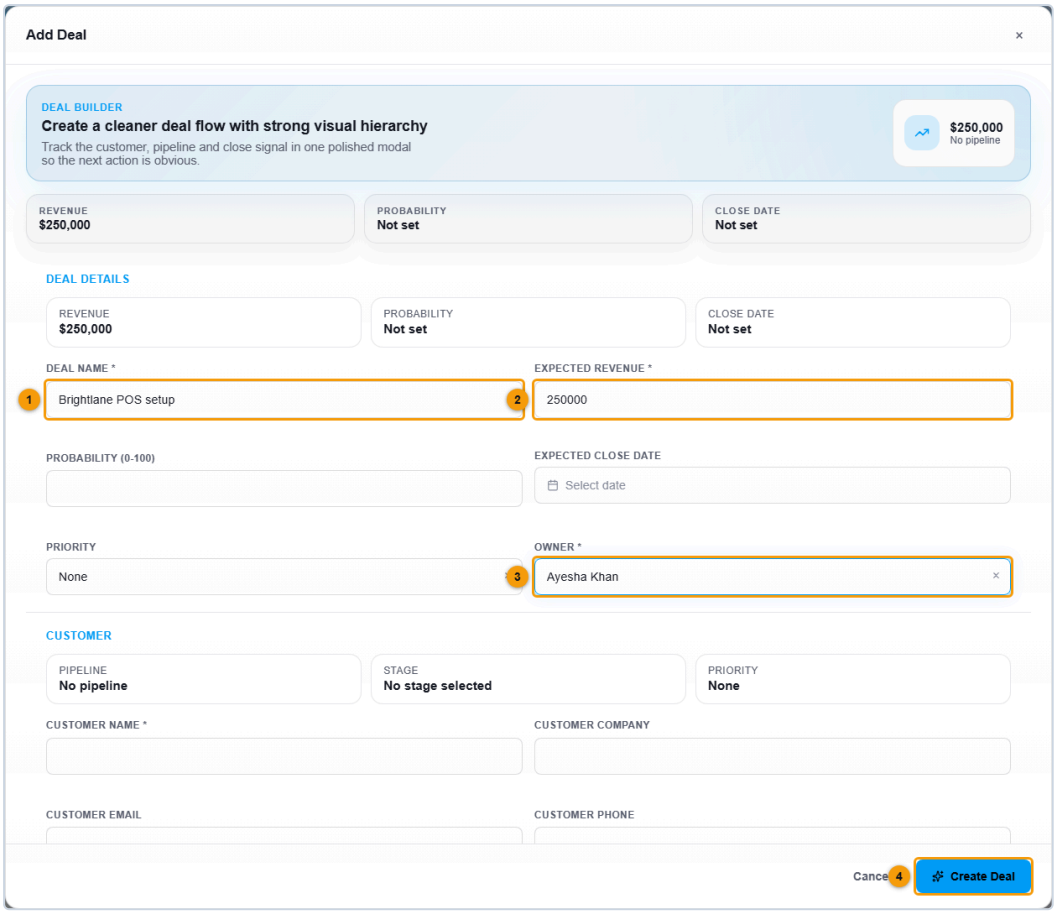
Plan: CRM Basic, Business, Pro and Agency

What this does

A deal is a possible sale. It has an expected value, an owner and a stage in your sales pipeline, such as New Deal, Proposal Sent or Won.

Steps

1. Open **CRM**, then **Deal**, and open the deals list.
2. Click **Add Deal**. The **Add Deal** window opens.

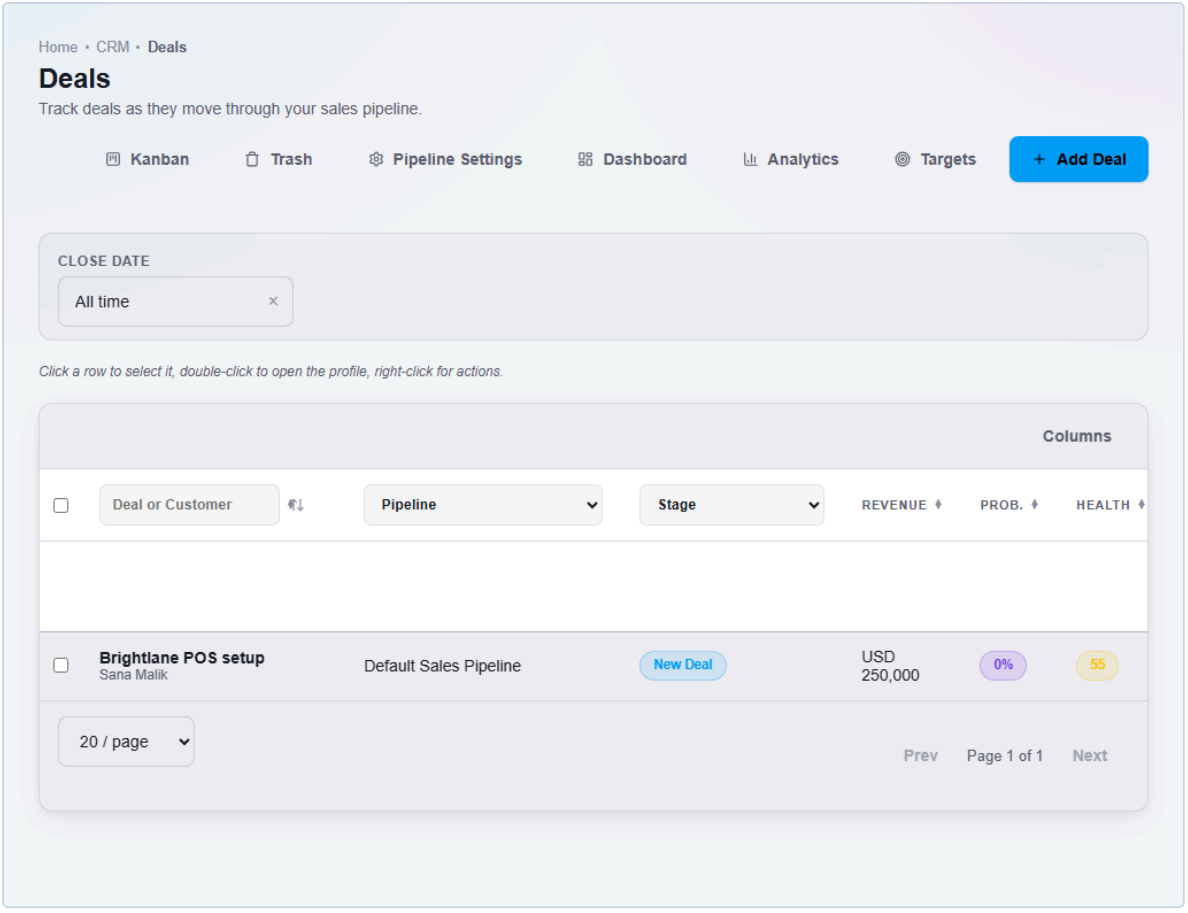


Deal name (1), expected revenue (2), owner (3) and Create Deal (4).

3. Enter the **Deal name** (1) and the **Expected revenue** (2).
4. Optionally enter the probability from 0 to 100, the expected close date and the priority.
5. Choose the **Owner** (3), the teammate responsible.
6. Enter the **Customer name** and, if you want, their company, email and phone.
7. Check the **Pipeline** and **Stage**. New deals start at the first stage, *New Deal*.
8. Click **Create Deal** (4).

What happens next

The deal appears in the **Deals** list. You can filter by pipeline, stage, priority and status (**Open**, **Won** or **Lost**). The **Kanban** button shows the deals as cards in columns, one column for each stage.



Deals with their revenue, stage and status.

Double-click a deal to open its profile.

Related guides

- The lead pipeline and Kanban
- The lead profile

The deal profile and CRM dashboard

Open a deal to see its value, stage and owner, hand it to a teammate, mark it won or lost, and read the CRM revenue dashboard.

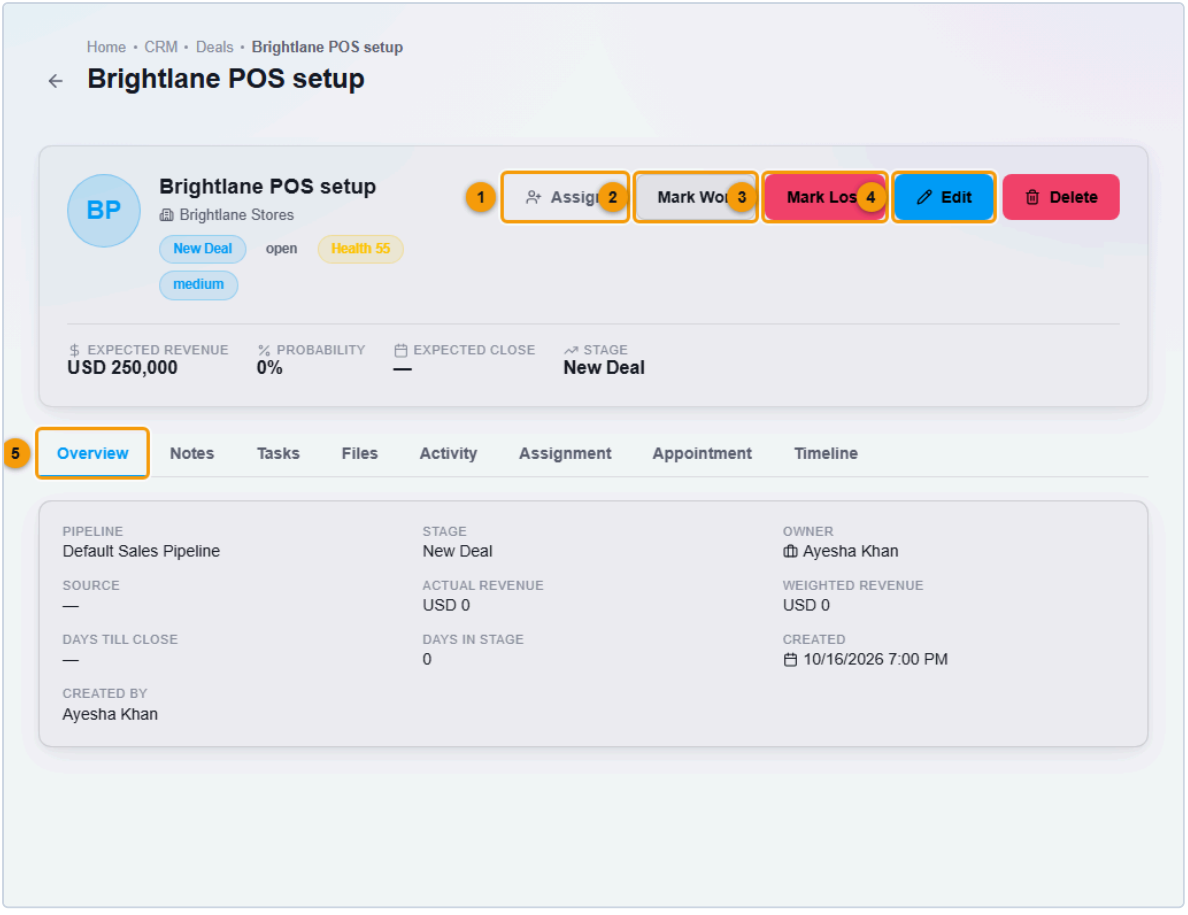
Plan: CRM Basic, Business, Pro and Agency

What this does

The deal profile is the full page for one deal. It shows what the deal is worth, where it is in the pipeline and who owns it. You close the deal from here as **won** or **lost**. The CRM dashboard adds up all your deals in one page.

Open a deal

1. Open **CRM**, then **Deal**, then **All Deals**.
2. Double-click the deal.



Assign (1), Mark Won (2), Mark Lost (3), Edit (4) and the tabs (5).

The top of the page shows the deal name, the customer's company, the stage, the status (**open**, **won** or **lost**), a **Health** score and the priority. Below that you see the **Expected revenue**, the **Probability**, the **Expected close** date and the **Stage**.

The **Overview** tab adds the pipeline, the owner, the source, the **Actual revenue**, the **Weighted revenue**, the days until the close date and the days the deal has been in its stage. Weighted revenue is the expected revenue multiplied by the probability.

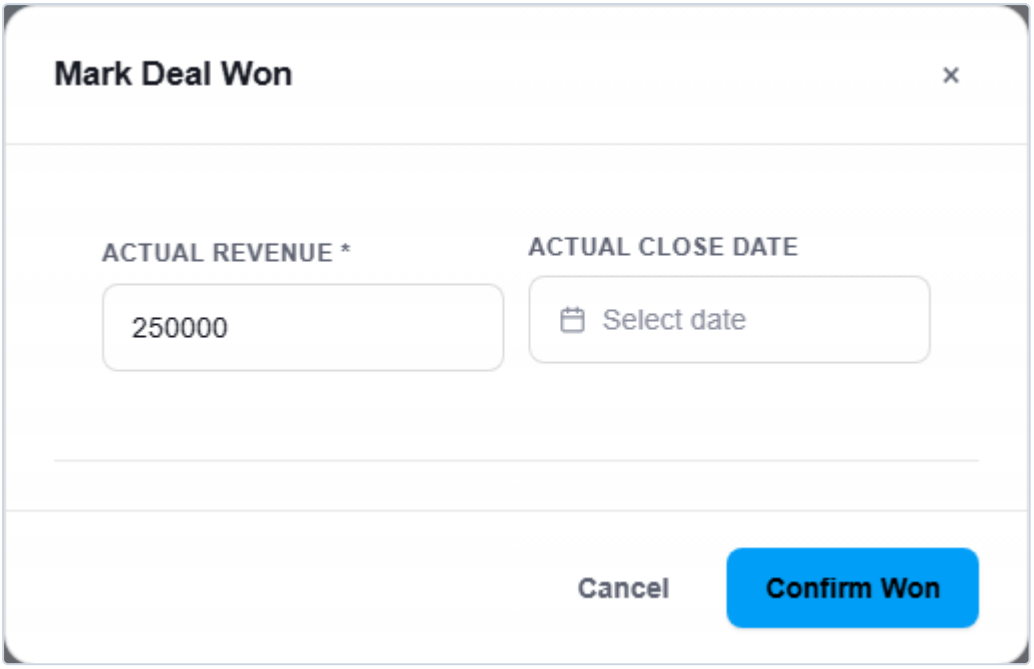
The other tabs are **Notes**, **Tasks**, **Files**, **Activity**, **Assignment**, **Appointment** and **Timeline**.

Change the deal

- **Edit** (4) opens the deal so you can change its details.
- **Assign** (1) gives the deal to another teammate.

Close the deal as won

1. Click **Mark Won** (2).
2. Enter the **Actual revenue** you earned. Add the **Actual close date** if it was not today.
3. Click **Confirm Won**.

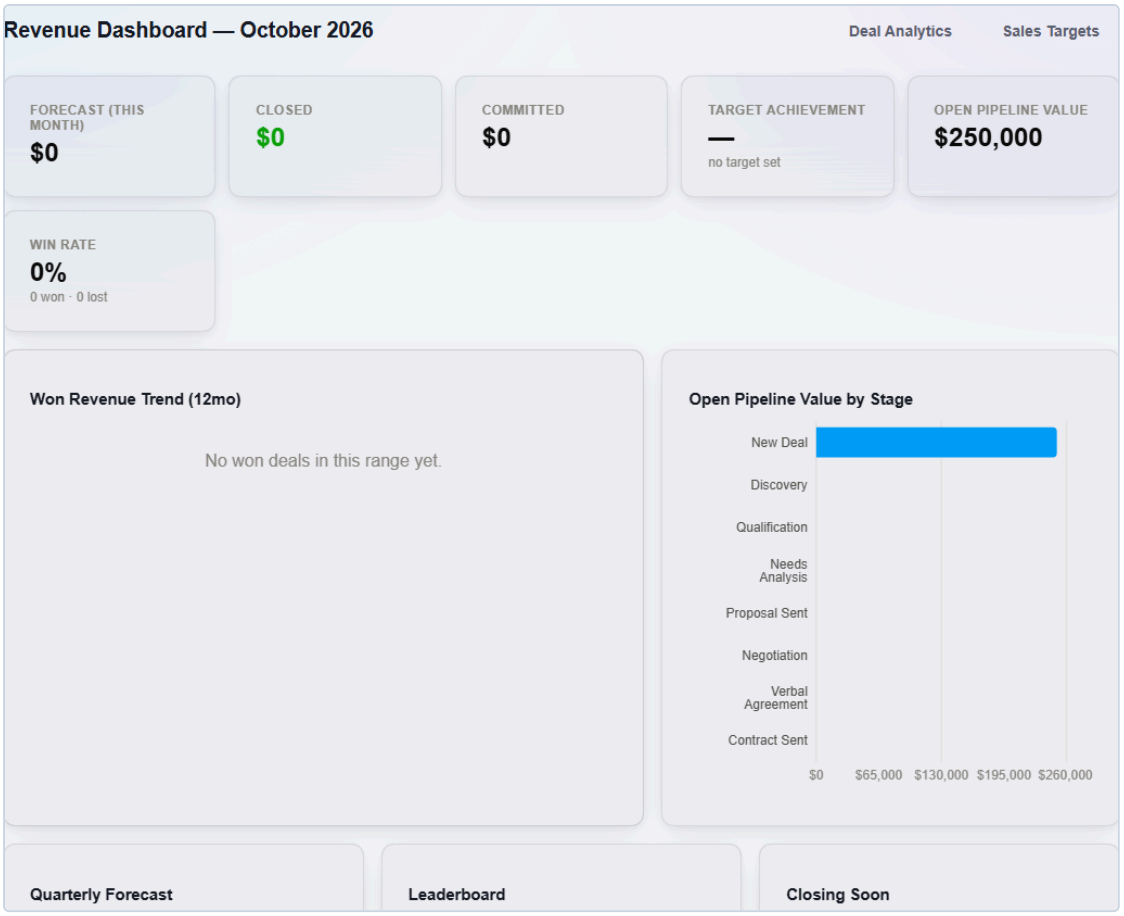


Enter the actual revenue and confirm.

Click **Mark Lost** (3) if the deal did not happen.

The CRM dashboard

Open **CRM**, then **CRM Dashboard** to see this month's **Revenue Dashboard**. It shows the forecast for the month, the revenue closed and committed, how close you are to your target, the value of your open pipeline and your win rate. Charts show won revenue over the last 12 months and the open pipeline value in each stage. A leaderboard ranks your sellers, and **Closing Soon** lists deals close to their close date.



The numbers are built from your deals. A new account shows zeros until deals are won.

Important notes

- The dashboard only counts the deals you have in NEXTOREx. It shows **no target set** until a sales target is set for you.
- Mark a deal won only when the sale is agreed.

Related guides

- Deals
- Appointments
- Tasks and follow-ups

The lead pipeline and Kanban

See your leads as cards in columns and review the stages of your pipeline.

Plan: CRM Basic, Business, Pro and Agency

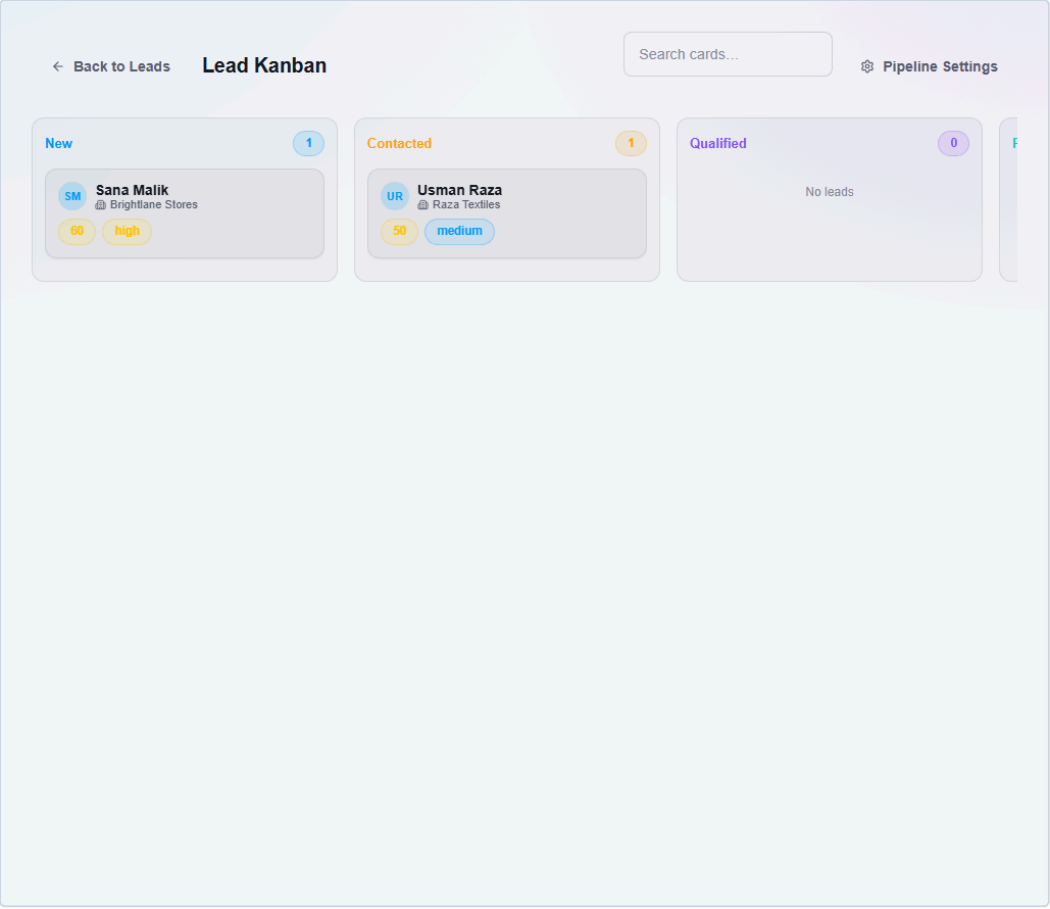
What this does

A pipeline is the list of stages a lead moves through. The Kanban board shows your leads as cards, grouped by stage.

Steps

To see the Kanban board:

1. Open **CRM**, then **Leads**, then **All Leads**.
2. Click **Kanban** at the top right.



Leads grouped by stage.

Click **Back to Leads** to return to the list.

To see or change the stages:

1. Open **CRM**, then **Leads**, then **Pipeline Setup**, or click **Pipeline Settings** on the Leads page.
2. You will see your pipelines, such as **Default Lead Pipeline**, with the number of stages. The buttons let you add, edit, clone or delete a pipeline.

Important notes

- A new lead only appears on the Kanban board if it has a pipeline and a stage. You can choose them when you create or edit a lead.

Related guides

- Create a lead
- Deals

Appointments

Book a meeting with a client, pick an open time slot, confirm it and record the outcome.

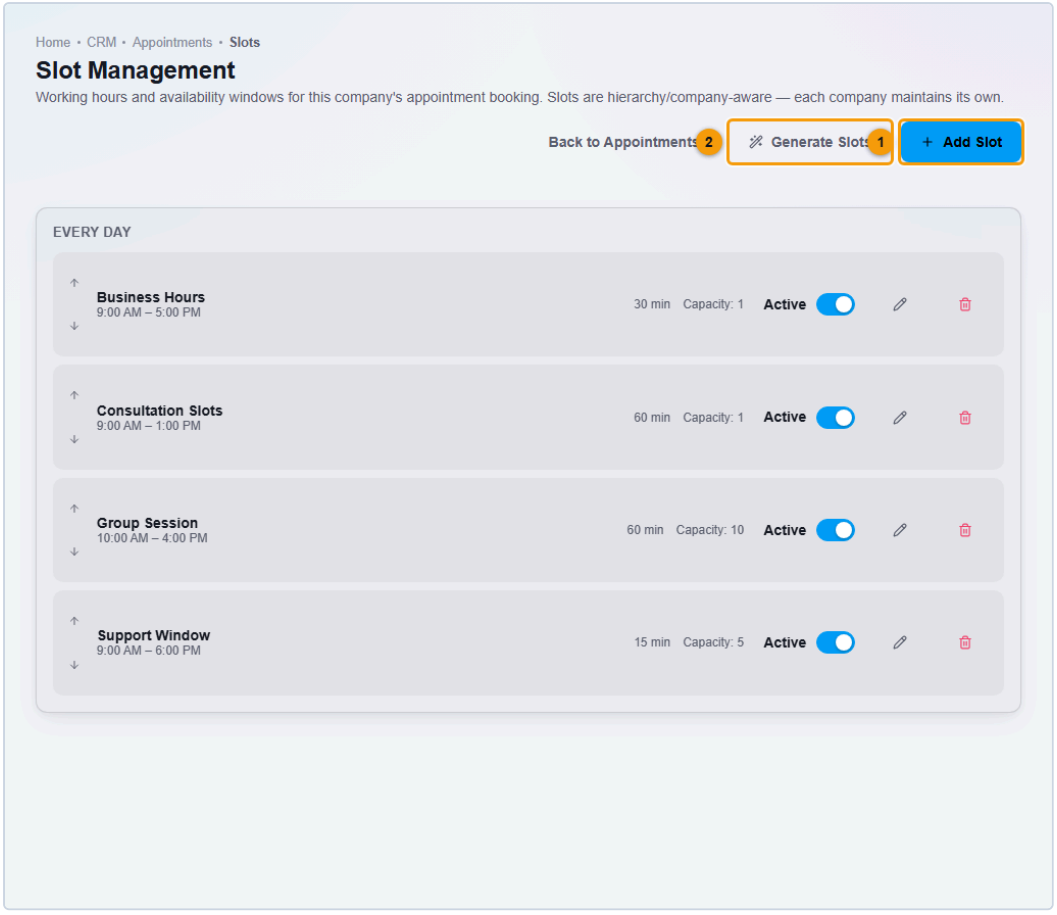
Plan: CRM Basic, Business, Pro and Agency

What this does

Appointments keep your meetings with clients in one place. You choose a date, a meeting length and one of the open time slots of the owner, and the appointment then moves through **scheduled**, **confirmed** and **completed**, with an outcome you record at the end.

Before you start

Your company needs working-hour windows, called slots. Open **CRM**, then **Appointments**, then **Slots** to see them.

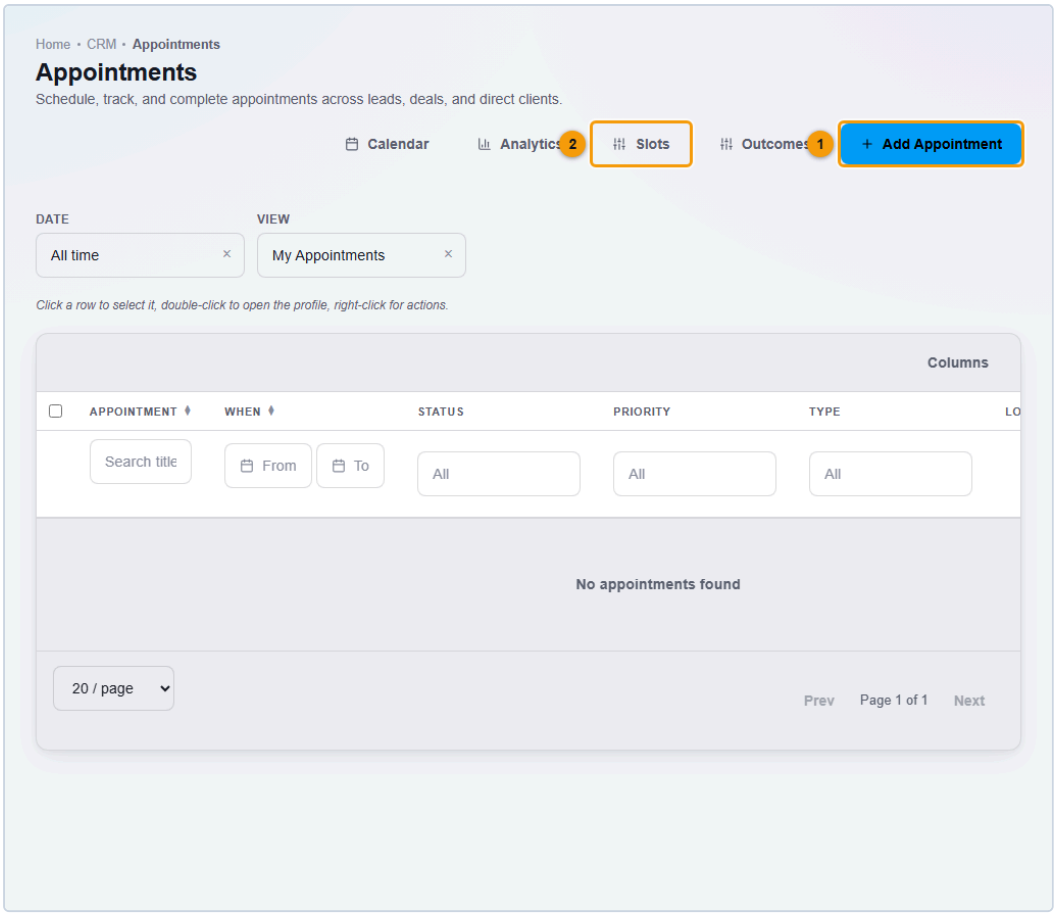


Add Slot (1) and Generate Slots (2). Each row is a window such as Business Hours, 9:00 AM to 5:00 PM.

If the list is empty, click **Add Slot** (1) and enter a **Name**, the **Day**, the **Duration (min)** of one slot, the **Max bookings** (0 means unlimited), and the **Start time** and **End time**. Click **Save Slot**. Use the switch on a row to stop offering a window.

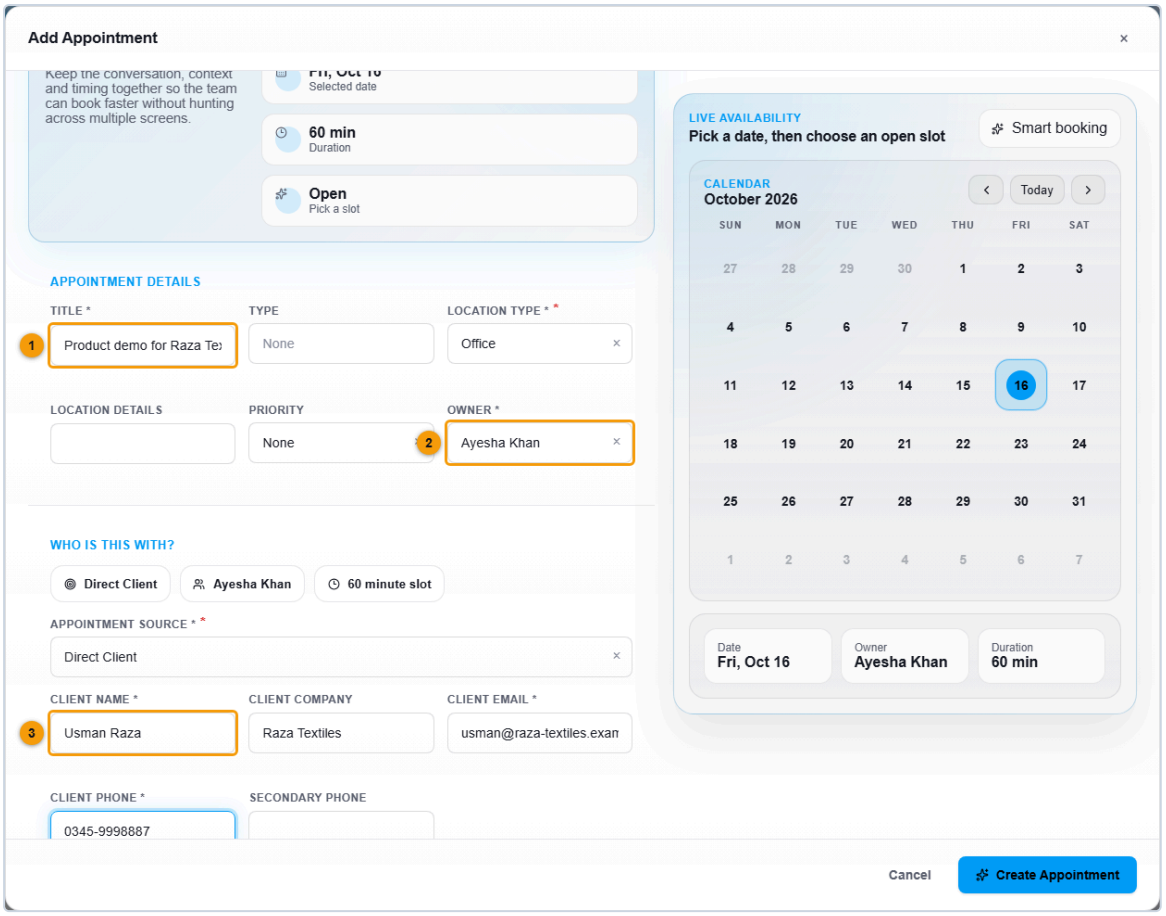
Book an appointment

1. Open **CRM**, then **Appointments**.



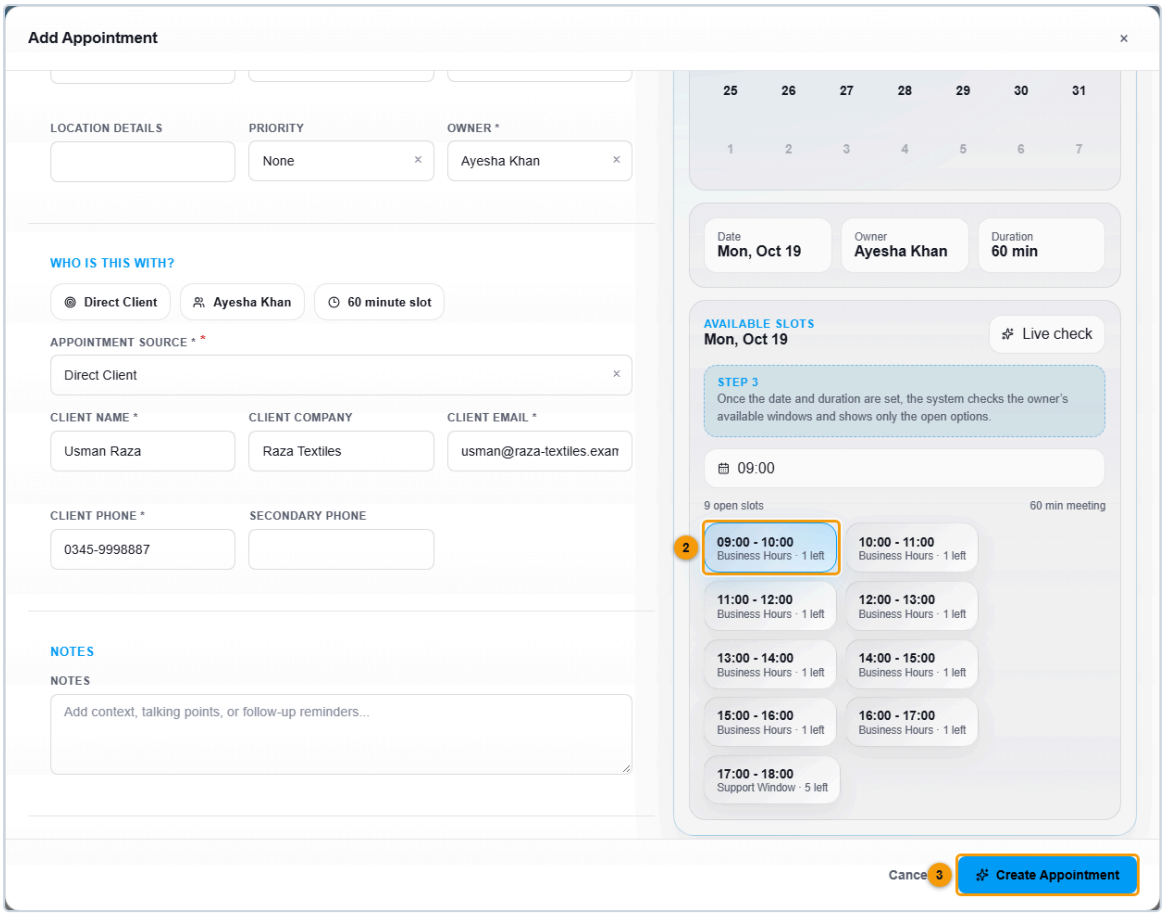
Add Appointment (1), Slots (2) and Calendar (3).

2. Click **Add Appointment** (1).
3. Enter the **Title** (1), choose the **Owner** (2), and enter the client's **Name** (3), **Email** and **Phone**.



Title (1), owner (2) and client name (3).

4. On the calendar at the right, click the **date**.
5. Under **Pick a meeting length**, choose **15, 30, 45, 60, 90** or **120 min**.
6. Under **Available slots**, click an open time. Only free times are shown.



Meeting length (1), open slot (2) and Create Appointment (3).

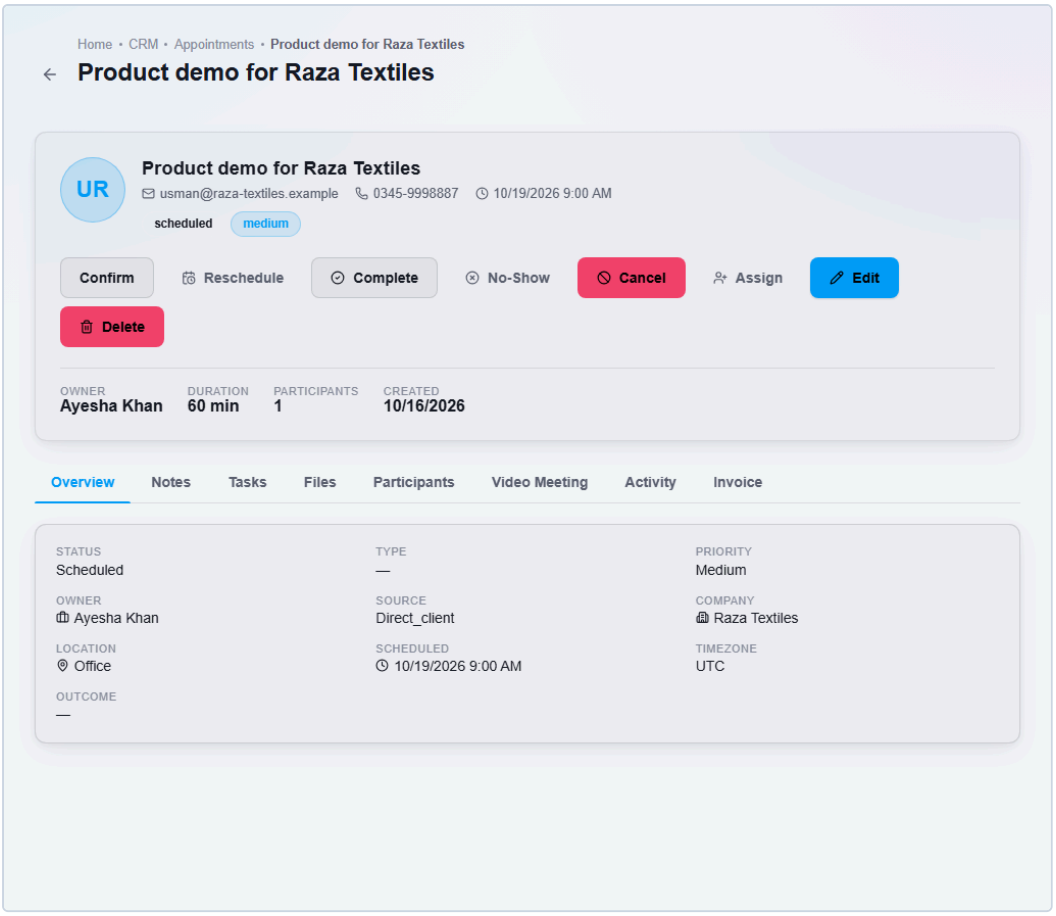
7. Click **Create Appointment** (3).

The appointments list covers meetings with leads, deals and direct clients. The steps above book a **Direct Client**.

Confirm, complete or change an appointment

Double-click the appointment to open its profile. The buttons at the top move it along:

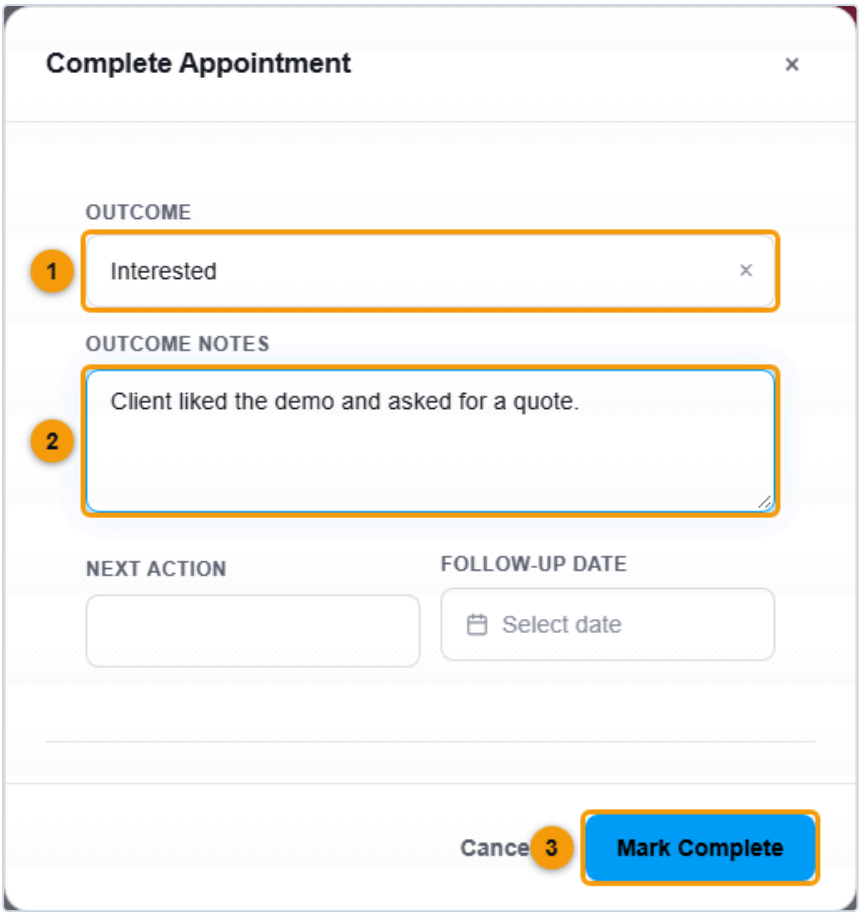
Button	What it does
Confirm	Marks the appointment as confirmed.
Reschedule	Moves it to another date and time.
Complete	Closes it and records the outcome.
No-Show	Records that the client did not come.
Cancel	Cancels the appointment.
Assign	Gives it to another teammate.



The profile with its action buttons and tabs: Overview, Notes, Tasks, Files, Participants, Video Meeting, Activity and Invoice.

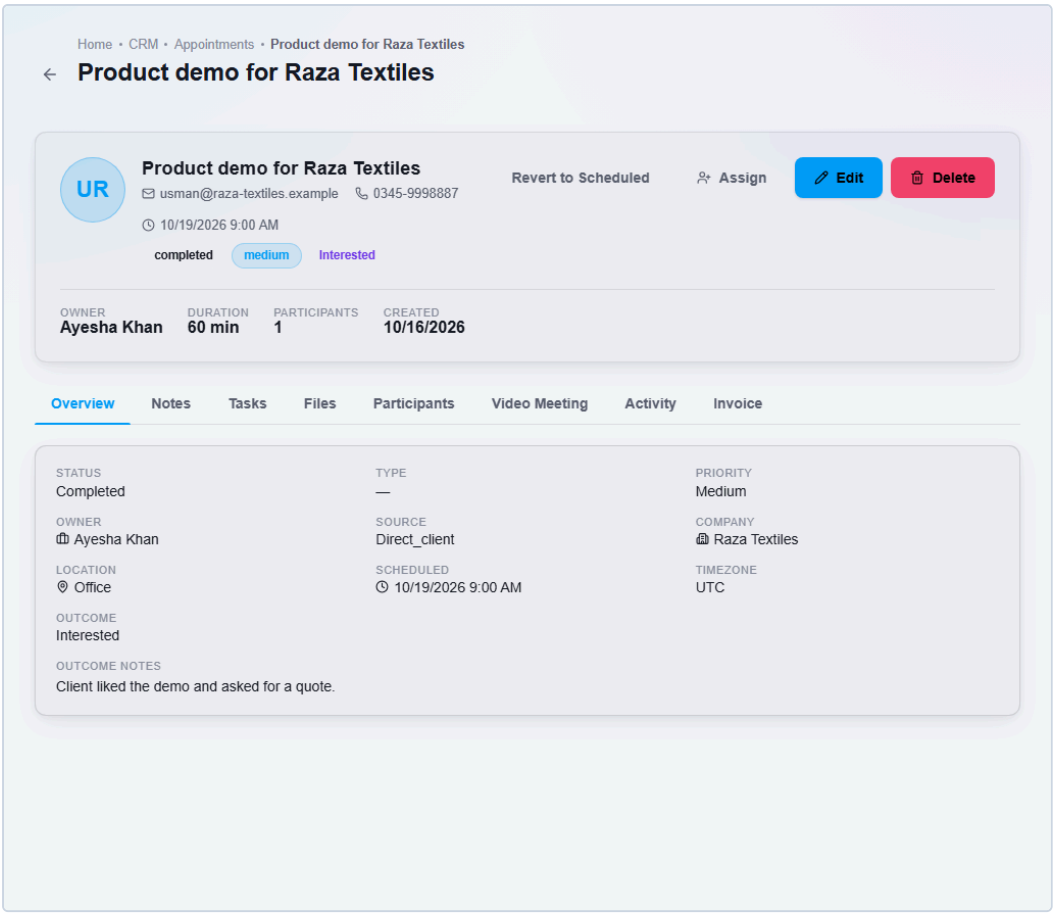
Record the outcome

1. Click **Complete**.
2. Choose the **Outcome**, for example **Interested**, **Proposal Requested** or **Closed Won**.
3. Add **Outcome notes**, and a **Next action** with a **Follow-up date** if you need one.
4. Click **Mark Complete**.



Outcome (1), outcome notes (2) and Mark Complete (3).

The profile shows the status **completed** with the outcome and your notes. **Revert to Scheduled** is available if you completed it by mistake.



The outcome and notes are kept on the appointment.

Important notes

- Slots belong to the company you are working in. Each company keeps its own working hours.
- Use **Calendar** at the top of the list to see appointments by month, week or day.

Related guides

- The lead profile
- Tasks and follow-ups
- Deals

Import leads from a CSV file

Add many leads at once from a spreadsheet saved as a CSV file.

Plan: CRM Basic, Business, Pro and Agency

What this does

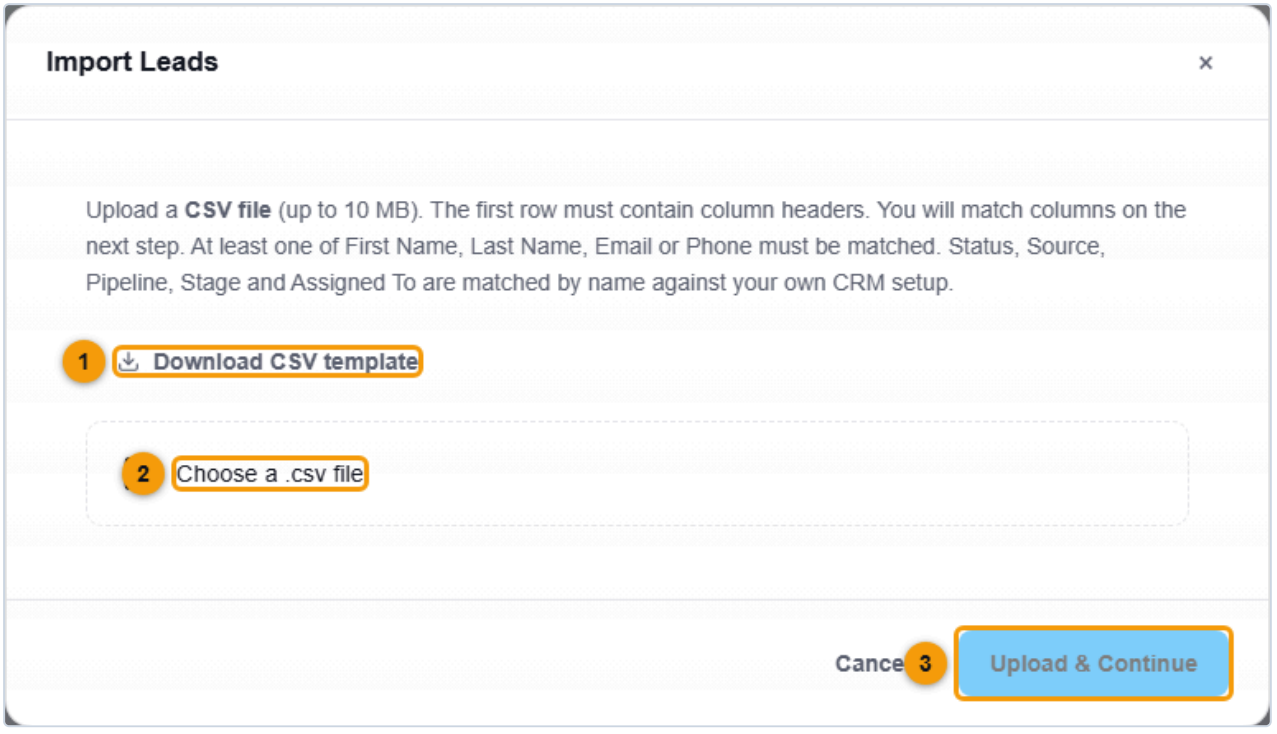
If you already have your leads in a spreadsheet, you can import them instead of typing each one.

Before you start

- Save your spreadsheet as a **CSV** file. The first row must have column headings. The file can be up to 10 MB.
- Each lead needs at least one of: first name, last name, email or phone.

Steps

1. Open **CRM**, then **Leads**, then **All Leads**.
2. Click **Import Leads**.



Download the template, choose your file, then continue.

3. Click **Download CSV template** if you want a ready-made file to fill in.
4. Click **Choose a .csv file** and pick your file.
5. Click **Upload & Continue**.
6. On the next step, match each column in your file to a lead field.

What happens next

NEXTOREx matches **Status**, **Source**, **Pipeline**, **Stage** and **Assigned To** by name against your own CRM setup, so the names in your file should match the names in your CRM.

Important notes

- Only CSV files are supported for import.

Related guides

- Create a lead

Education

Students, fees, attendance, exams and more

Education getting started and academic structure

Set up your school in NEXTOREx: find the Education menu, then create Academic Groups, Sections and Subjects before you admit students.

Plan: Education Essentials and above

What this does

NEXTOREx Education helps a school or academy manage students, fees, attendance and, on larger packages, staff, exams, timetables, a library, transport, hostel and payroll. This guide shows where everything is and how to build your **academic structure**, the Groups, Sections and Subjects that every other Education screen depends on.

- **Academic Group**: a class, grade or programme, for example **Grade 7**.
- **Academic Section**: a division inside one Group, for example **Section A**. A Section always belongs to one Group.
- **Subject**: a subject taught to one Group, for example **Mathematics**.

Who can use it

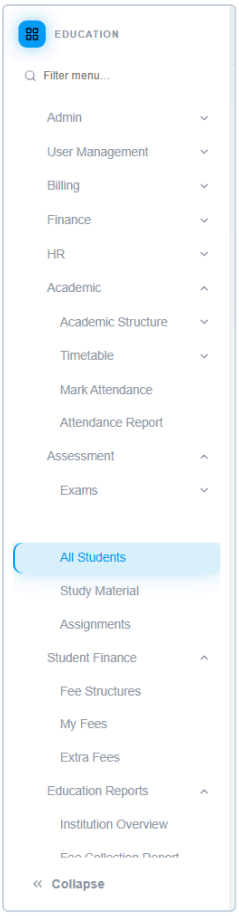
Staff whose role allows it. A school owner or administrator normally sets up the structure once. Teachers and other staff only see the screens their role allows.

Which package includes it

All three Education packages include the academic structure. See Education plans, limits and combining apps for what each package adds.

Where to find it

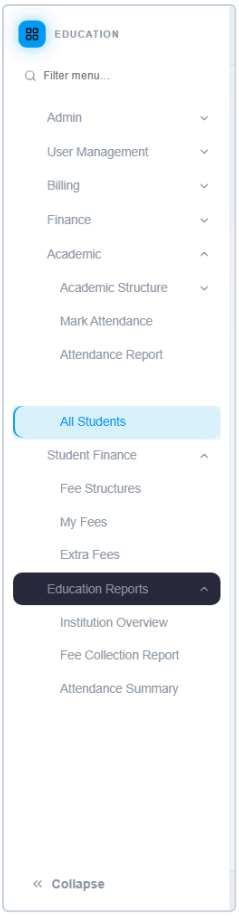
Open the **Education** application. The menu on the left groups the screens:



The Education menu. Academic, Assessment, Students, Student Finance and Education Reports are the groups you will use most.

- **Academic** holds **Academic Structure**, **Timetable**, **Mark Attendance** and **Attendance Report**.
- **Students** holds **All Students**, **Study Material** and **Assignments**.
- **Student Finance** holds **Fee Structures**, **My Fees** and **Extra Fees**.
- **Education Reports** holds the reports and the Institution Overview.

Your menu shows only what your package and your role include. For example, an Education Essentials school does not see Timetable, Exams, Library, Transport, Hostel or Payroll.



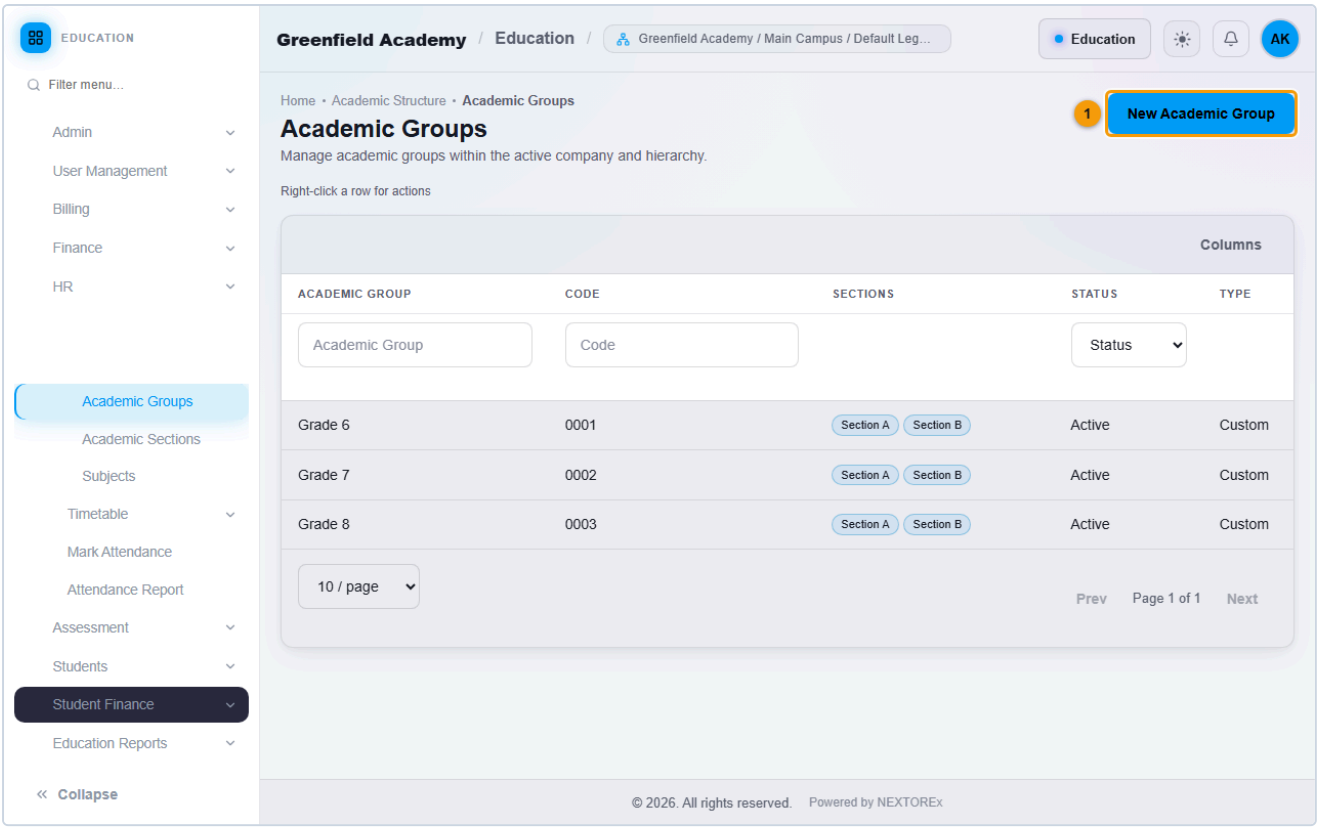
The menu of an Education Essentials school. Staff, Timetable, Exams, Library, Transport, Hostel and Payroll belong to larger packages.

Steps

Create the structure in this order. Each step needs the one before it.

1. Create your Academic Groups

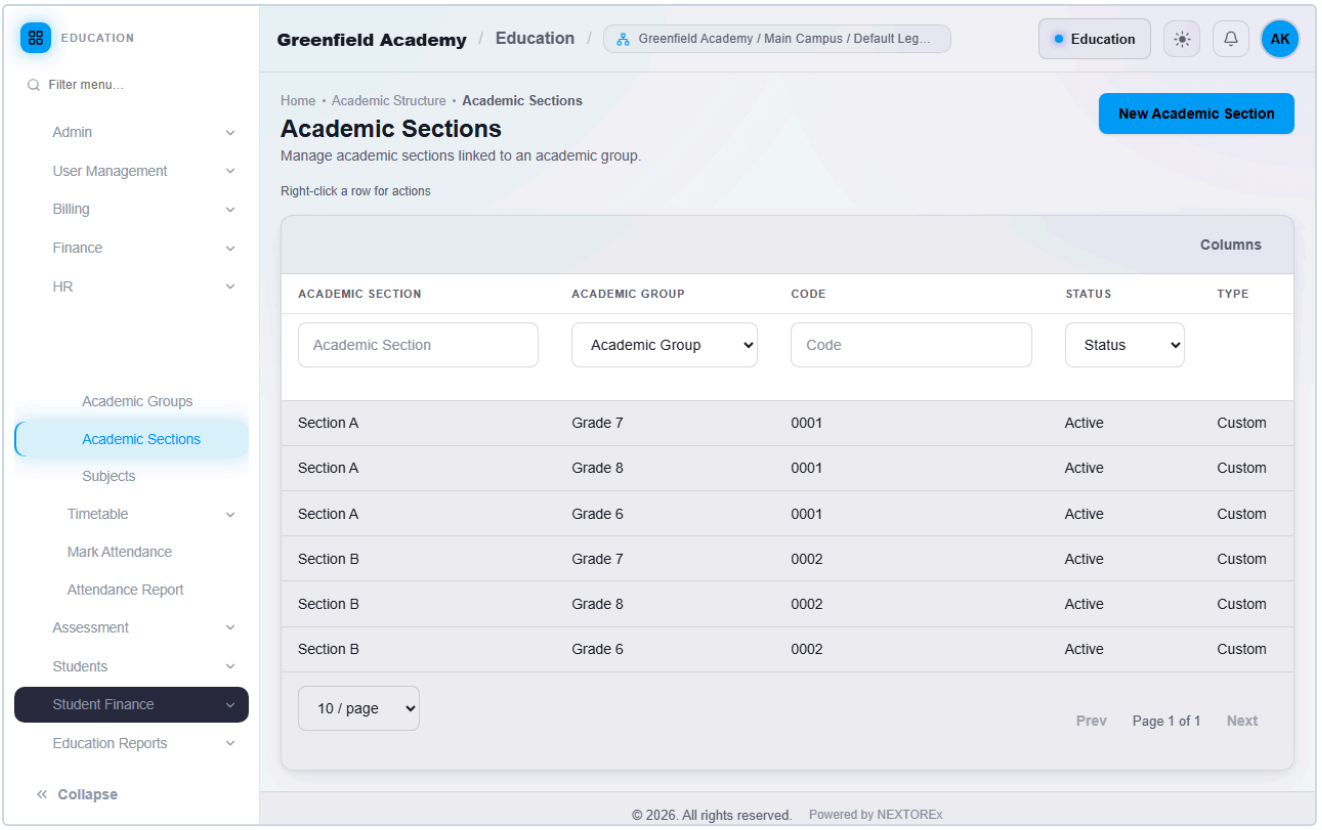
1. Open **Academic**, then **Academic Structure**, then **Academic Groups**.
2. Click **New Academic Group** (1).
3. Enter the **Academic Group Name**, for example `Grade 7`. NEXTOREx creates the code for you.
4. Click **Save**. Repeat for every class or grade.



Academic Groups, each showing the Sections inside it. Use New Academic Group (1) to add one.

2. Create the Sections inside each Group

1. Open **Academic Structure**, then **Academic Sections**.
2. Click **New Academic Section**.
3. Choose the **Academic Group** first. Then enter the **Academic Section Name**, for example `Section A`.
4. Add a short **Description** if you want, for example `Morning batch, Block 1`. It is shown later when you choose a Section.
5. Click **Save**.

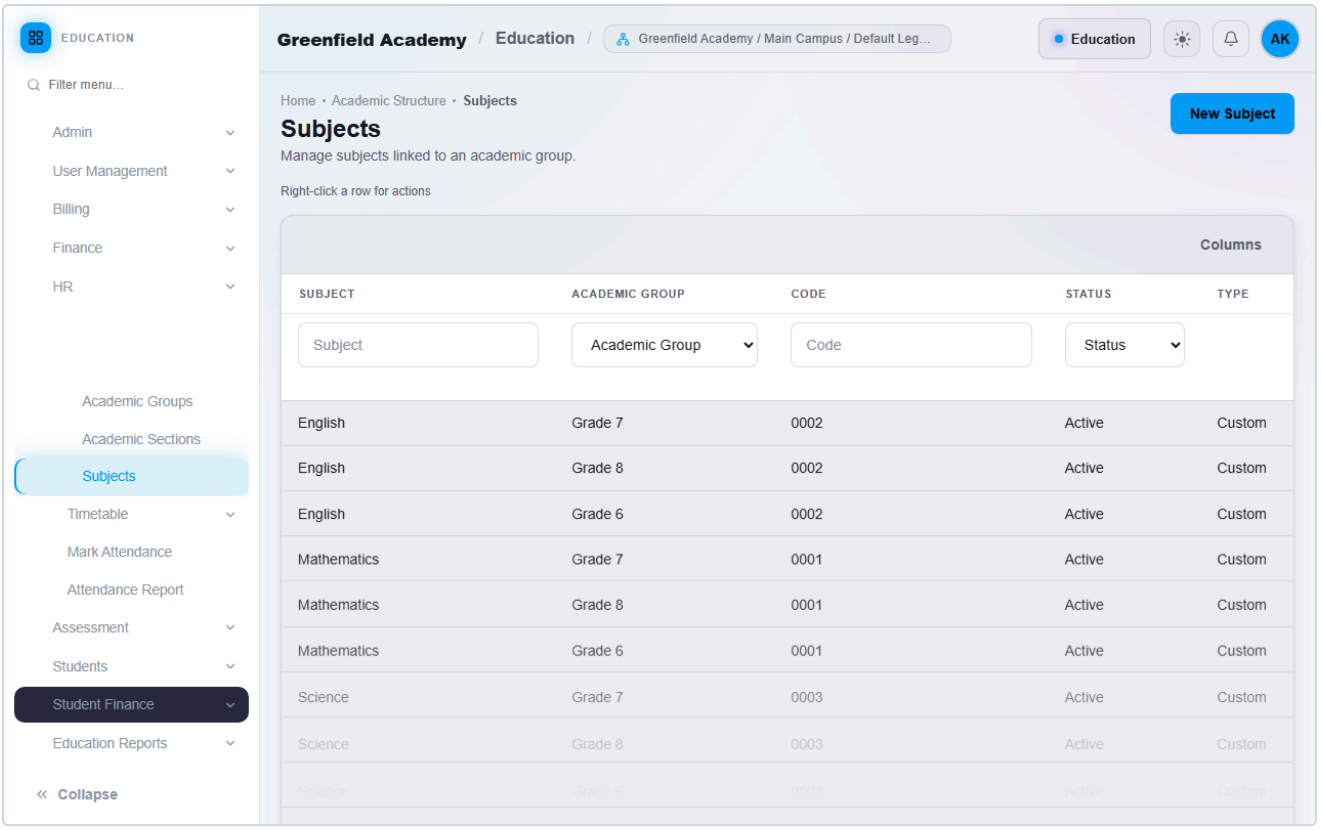


Sections, each belonging to a Group.

3. Create your Subjects

1. Open **Academic Structure**, then **Subjects**.
2. Click **New Subject**, choose the **Academic Group** the Subject is taught to, and enter the **Subject Name**.
3. Click **Save**.

If the same Subject is taught in several Groups, add it once for each Group.



Subjects, each belonging to a Group.

What happens next

You can now admit students. Every place that asks for a Group and a Section works the same way: pick the **Group first**, then the **Section**. Read Students: admission and management next.

Important rules

- A Section cannot exist without a Group.
- Wherever you choose a Group and a Section, the Section list shows **only the Sections of the Group you chose**. Changing the Group clears the Section so the two can never disagree.
- Your company and branch setup comes first. If you manage more than one campus or branch, see Company and branches. Multi-branch setup is part of the platform for every package, not a feature of one Education package.

Common mistakes

- Creating Sections before Groups. Create the Group first.
- Spelling the same Group two ways (for example `Grade 7` and `Class 7`). Choose one name and keep to it.
- Adding Subjects to the wrong Group. A Subject belongs to exactly one Group.

Related guides

- Students: admission and management

- Fees, scholarships, waivers and fee generation
- Student attendance

Students: admission and management

Record inquiries and admissions, put each student in a Group and Section, follow the admission steps, edit records and understand the Student limit of your package.

Plan: Education Essentials and above

What this does

The **Students** screen holds every student record, from the first inquiry to enrolment and withdrawal. Each student has a Group and a Section, an admission status, guardian details and a fee history.

Who can use it

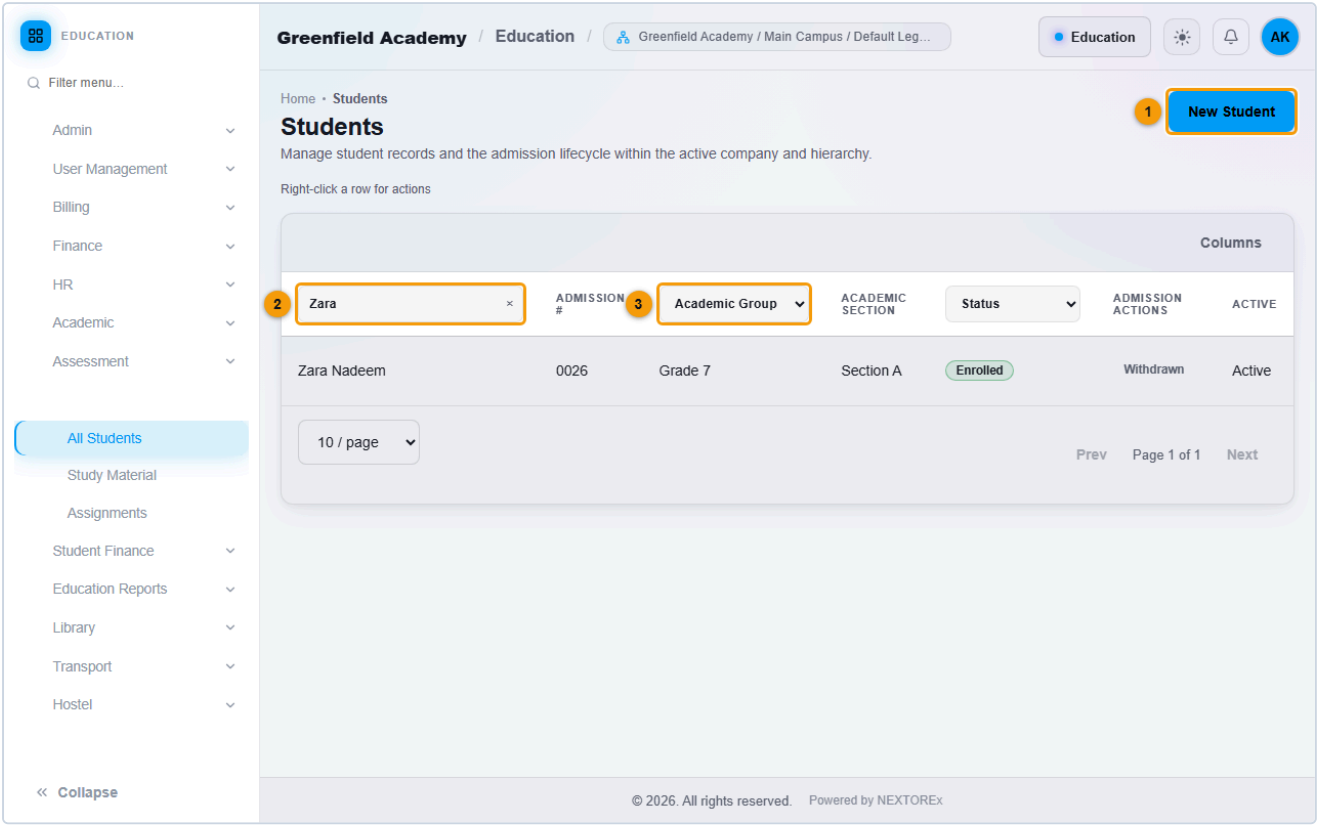
Staff whose role includes the Student permissions. Students themselves only see their own information.

Which package includes it

All Education packages. The number of students you can have enrolled depends on the package: 200 on Education Essentials, 750 on Education Standard and 2,500 on Education Campus.

Where to find it

Open **Students**, then **All Students**.

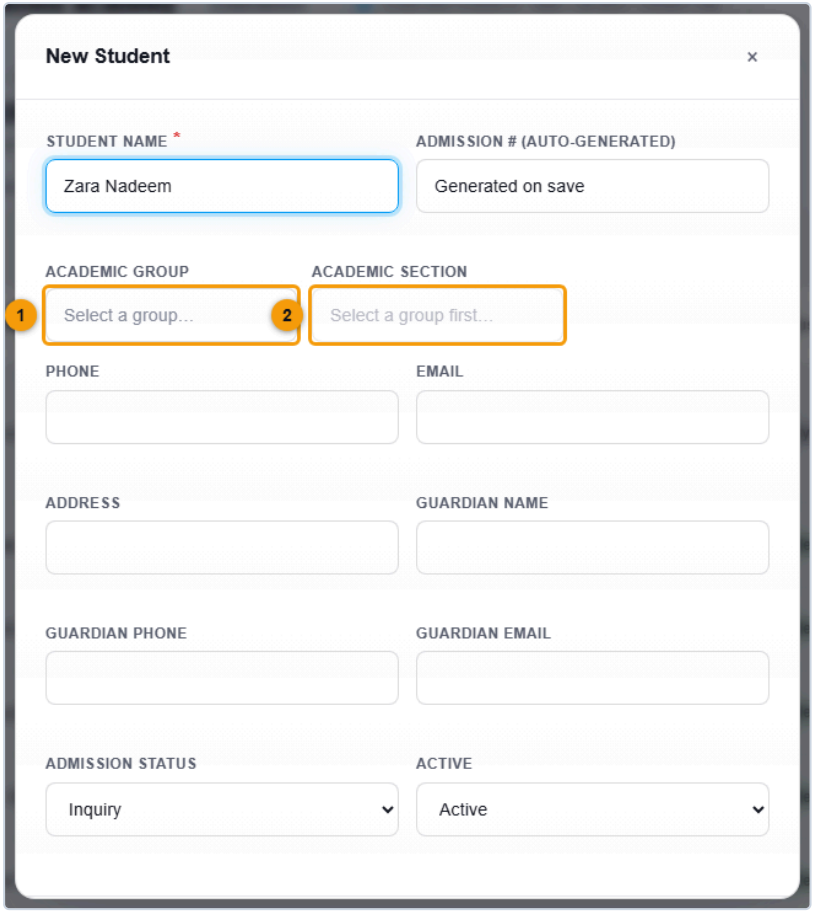


Click New Student (1) to add a record. Search by name, code, phone or email (2). Filter by Academic Group (3) or admission status.

Steps: add a student

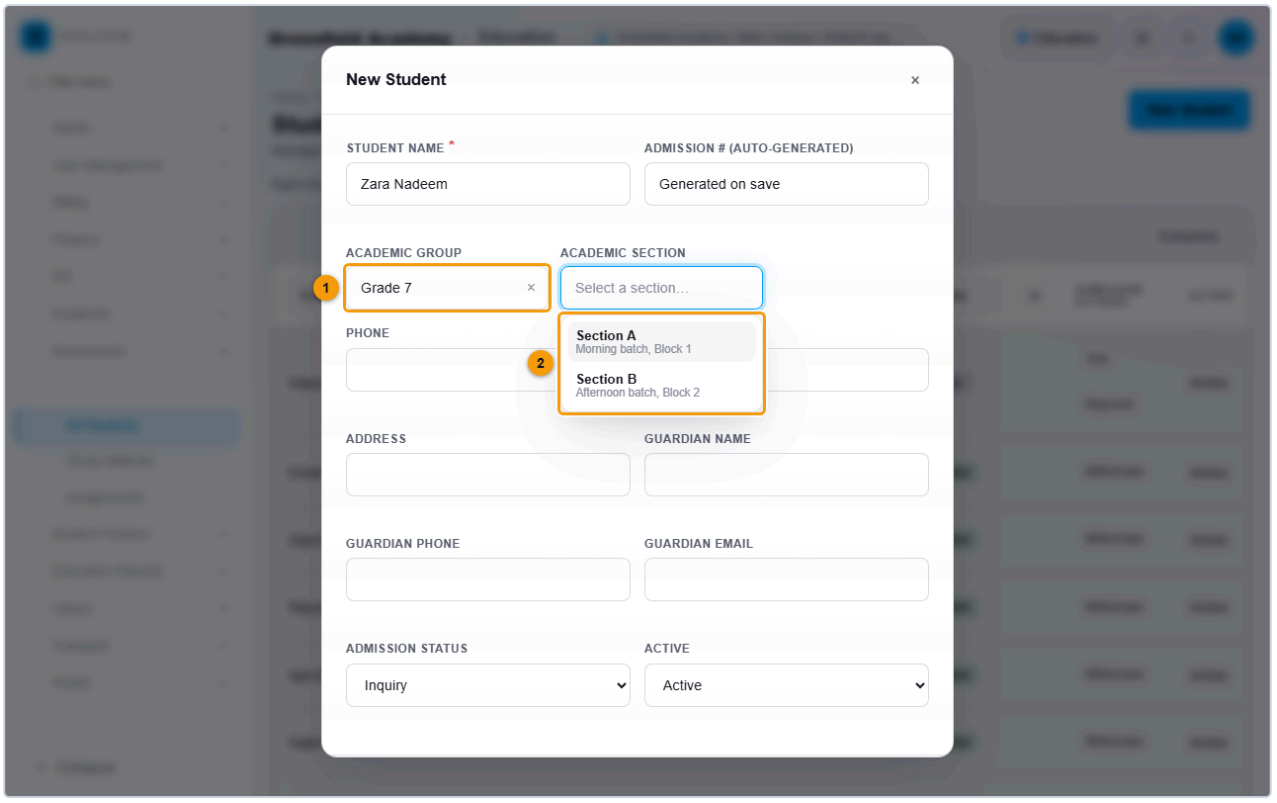
1. Click **New Student** (1).

2. Enter the **Student Name**. The **Admission #** is created for you when you save.
3. Choose the **Academic Group** first. The **Academic Section** stays unavailable until a Group is chosen.



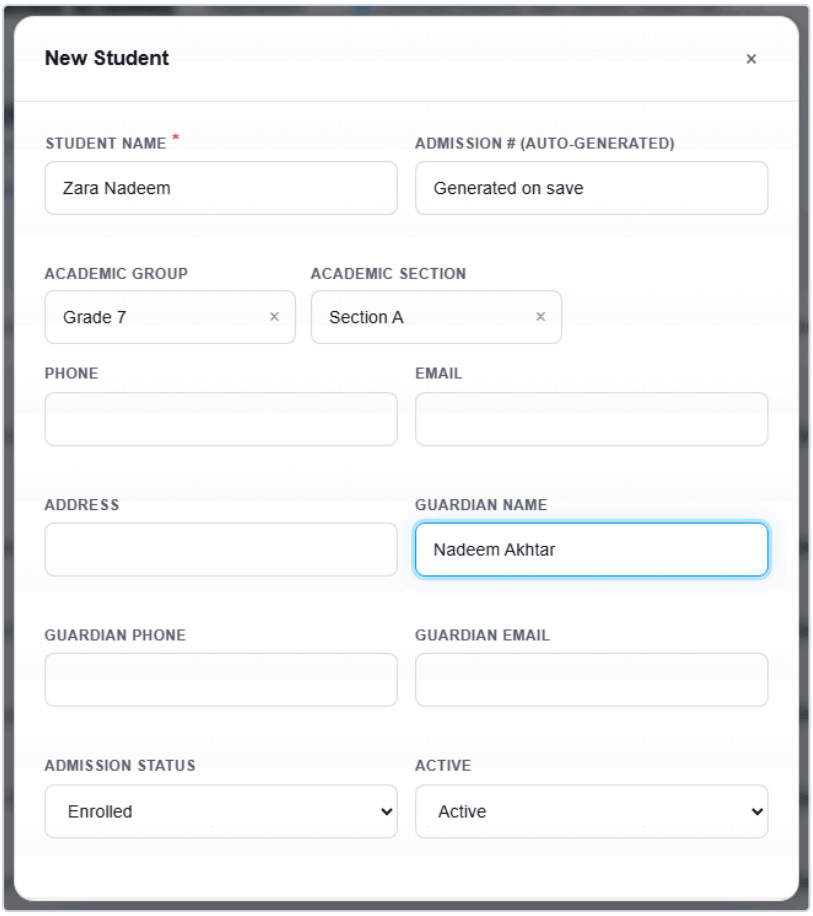
Before a Group is chosen, the Section says Select a group first (2).

4. Open **Academic Section**. Only the Sections that belong to the chosen Group are listed, and each shows its short description.



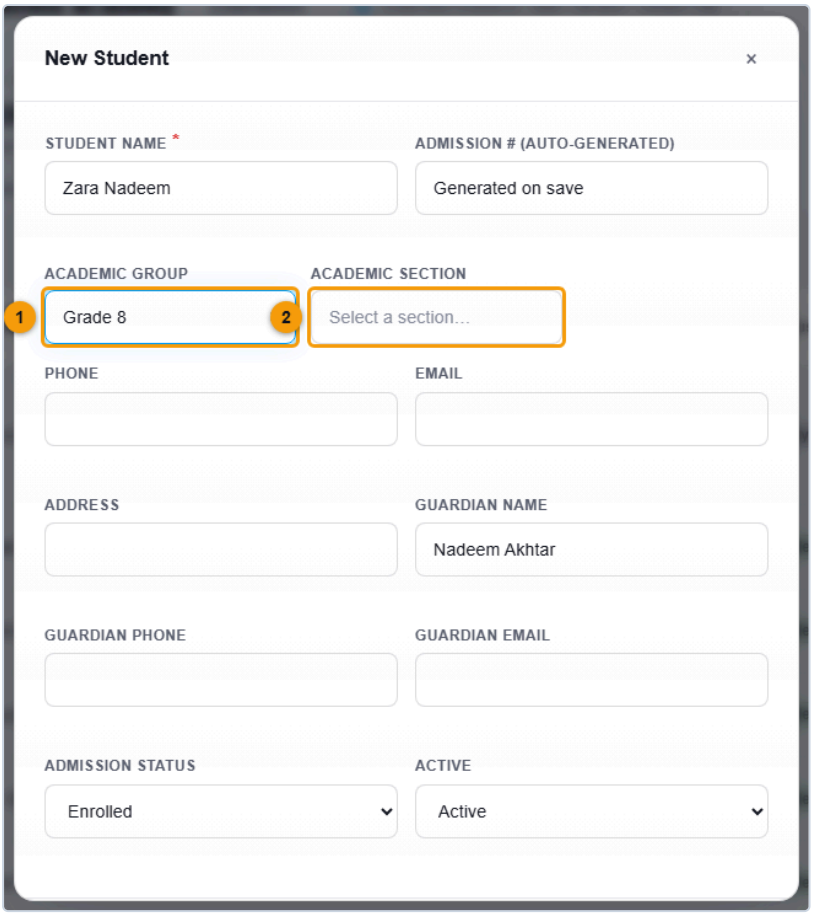
After choosing Grade 7 (1), only Section A and Section B of Grade 7 are offered (2).

5. Fill in the guardian name, phone and email if you have them, and choose the **Admission Status**. Use **Inquiry** for a prospective student and **Enrolled** for a student who has joined.
6. Click **Save**.



A completed New Student form.

If you change the Group after choosing a Section, the Section is cleared so you cannot end up with a Section from another Group.



After changing the Group (1) the Section (2) is empty again and you choose it again.

The student login

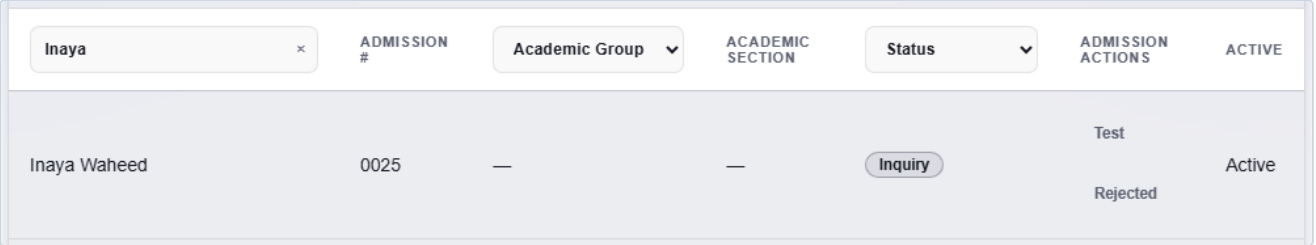
When a student is saved, NEXTOREx also creates a **Student Portal** login. A window appears with the **login email** and a **one-time password**. Share them with the student or guardian. The student is asked to change the password after the first sign-in. Copy the password before you click **Done**, because it is not shown again.

Student portal logins do **not** use up the User seats of your package. See Education plans, limits and combining apps.

The admission steps

A record moves forward one step at a time, using the action links at the end of its row:

From	Next step
Inquiry	Test or Rejected
Test	Admitted or Rejected
Admitted	Enrolled or Withdrawn
Enrolled	Withdrawn
Rejected or Withdrawn	No further steps

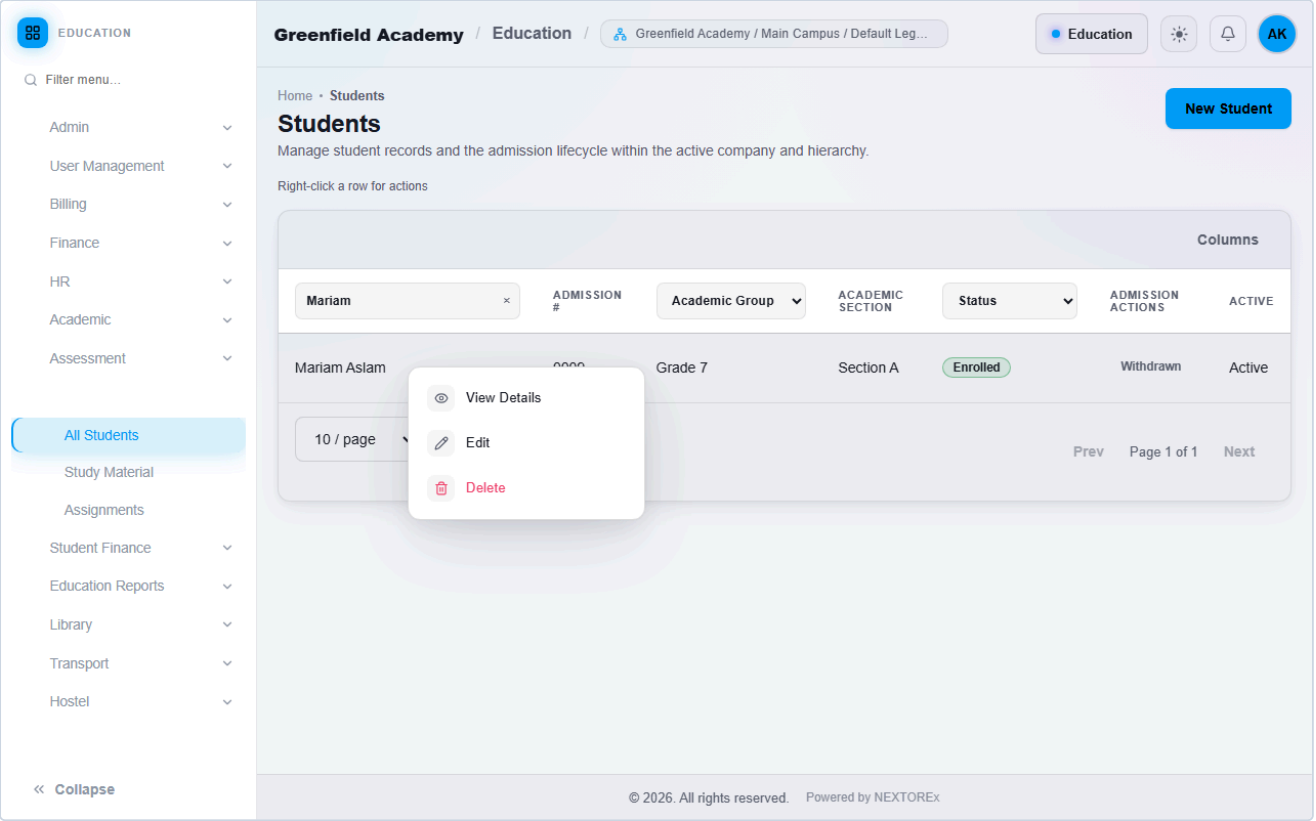


An Inquiry record offers Test and Rejected. An Enrolled record offers Withdrawn.

A student counts toward your package limit only while the status is **Enrolled**, the student is **Active** and the record is not deleted.

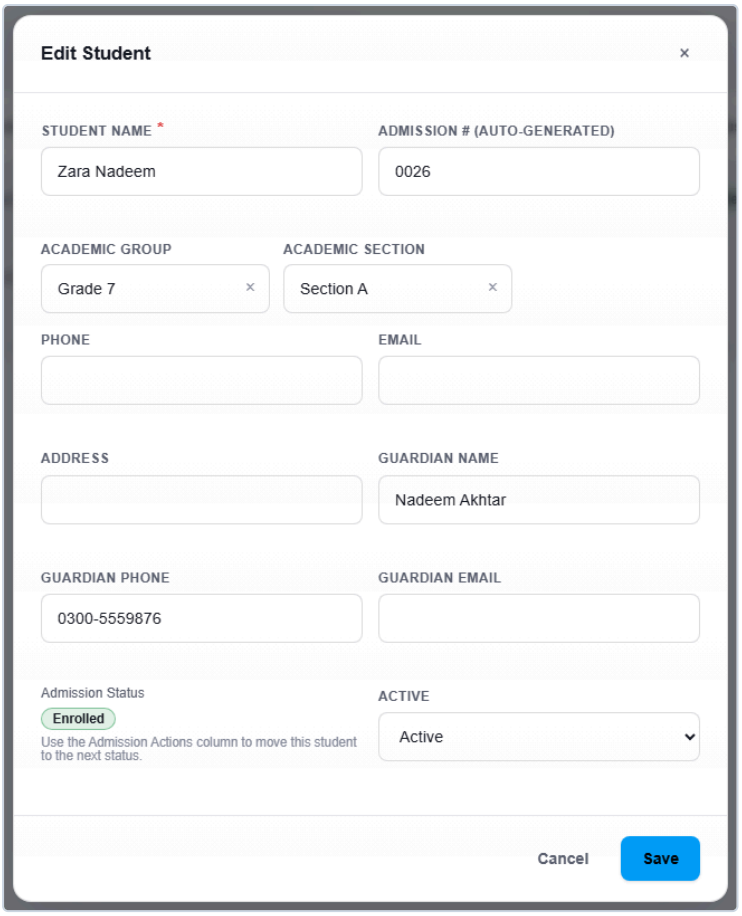
Edit, view or delete a student

1. Right-click the student's row.
2. Choose **View Details**, **Edit** or **Delete**.



The row menu: View Details, Edit and Delete.

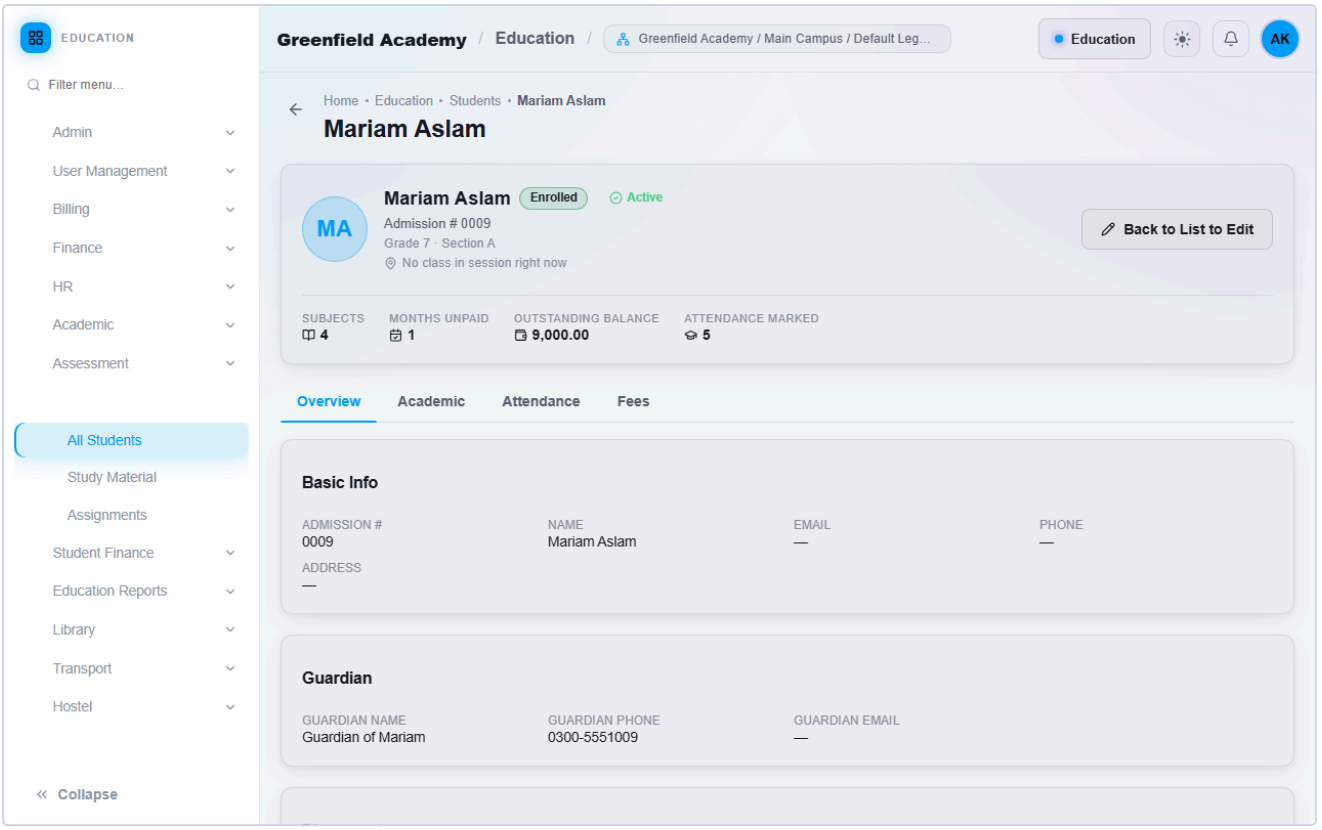
Edit opens the same form as **New Student**.



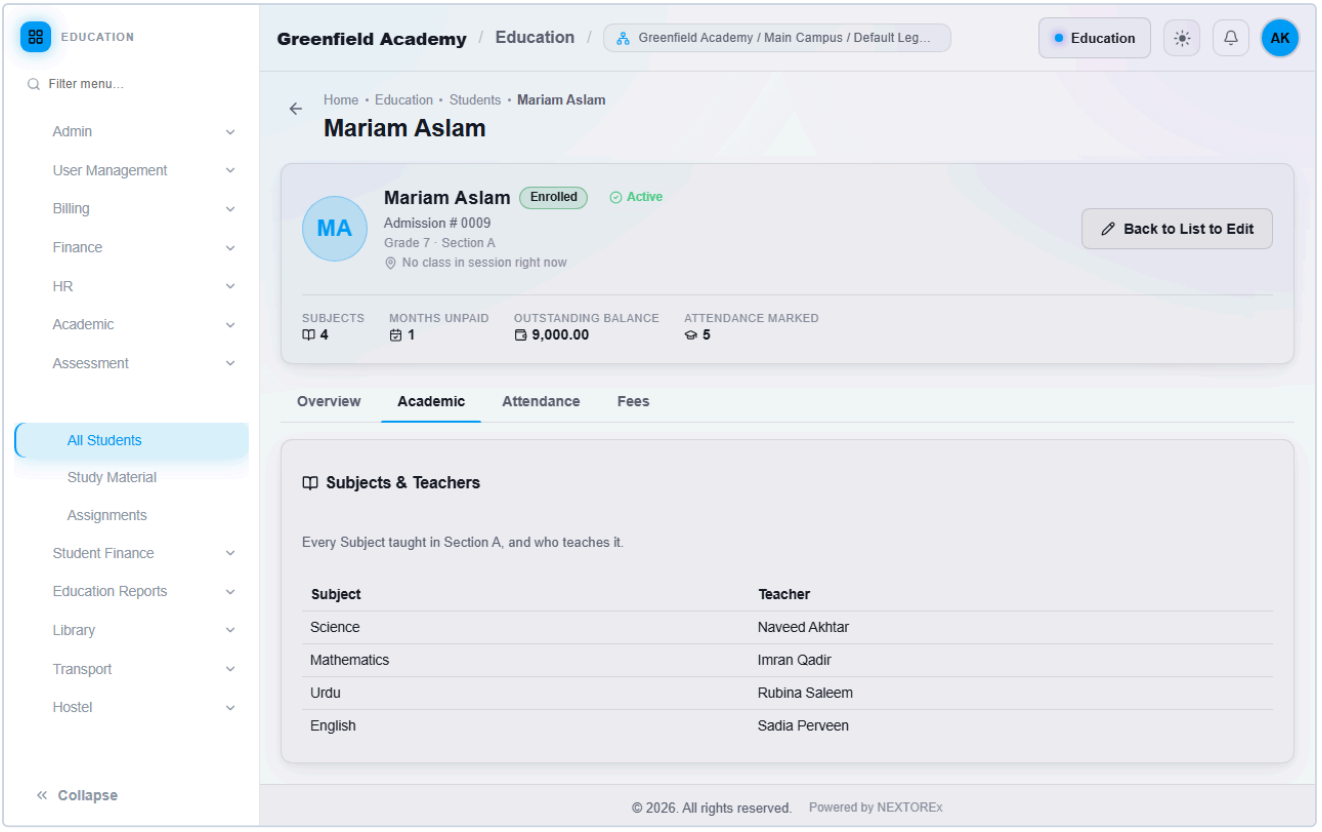
The Edit Student window.

View Details opens the student profile. The top shows the number of Subjects, months unpaid, the outstanding balance and how many days of attendance are marked. The tabs are:

- **Overview**: personal and guardian details and the Group and Section.
- **Academic**: the Subjects of the student's Section and who teaches each one.
- **Attendance**: present, absent, late and leave days, month by month.
- **Fees**: every fee invoice of the student. See Student payments and fee statement.



The student profile with its summary and tabs.

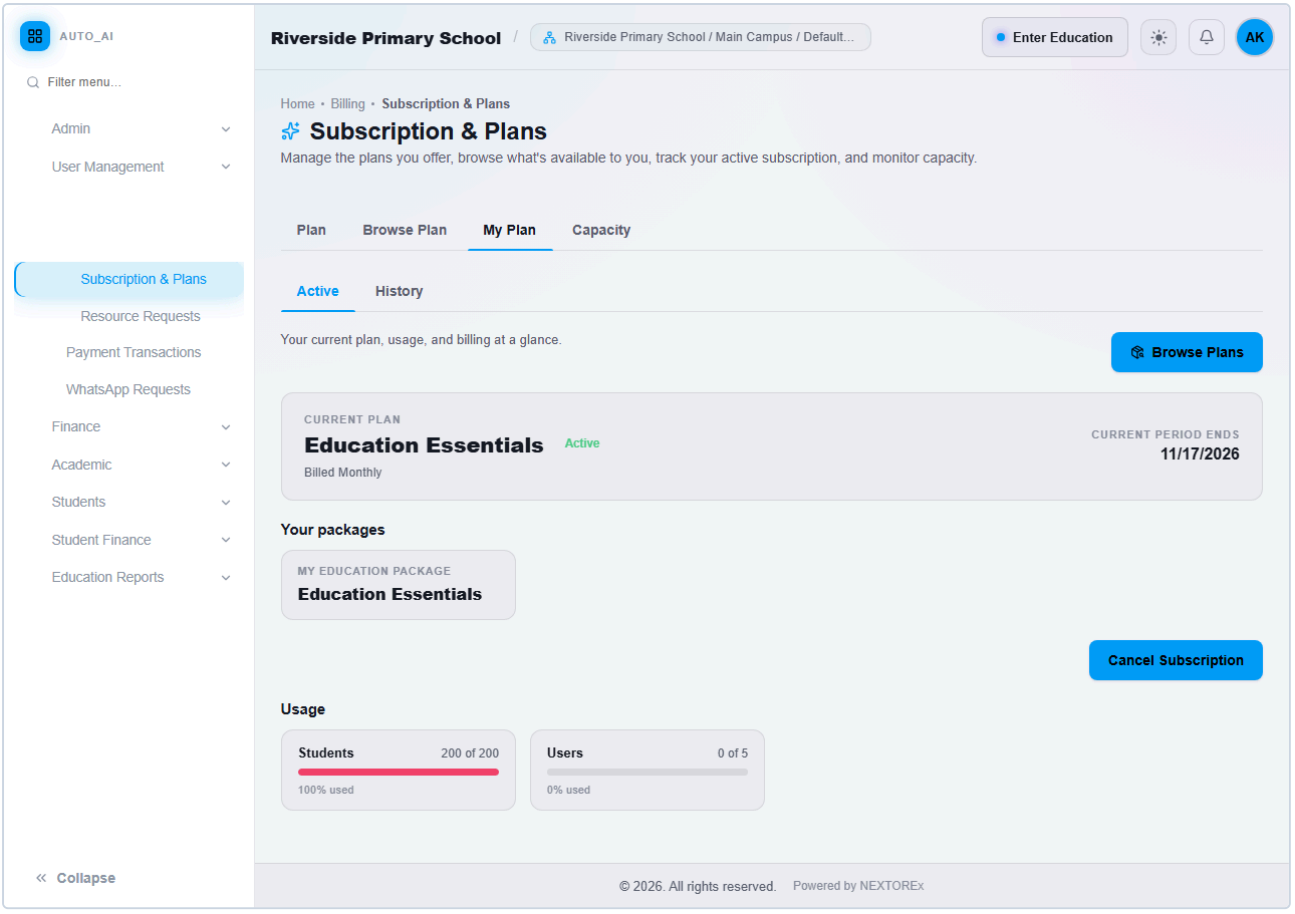


The Academic tab lists the Subjects of the student's Section and the teachers.

Student limit

Your package allows a fixed number of **enrolled** students.

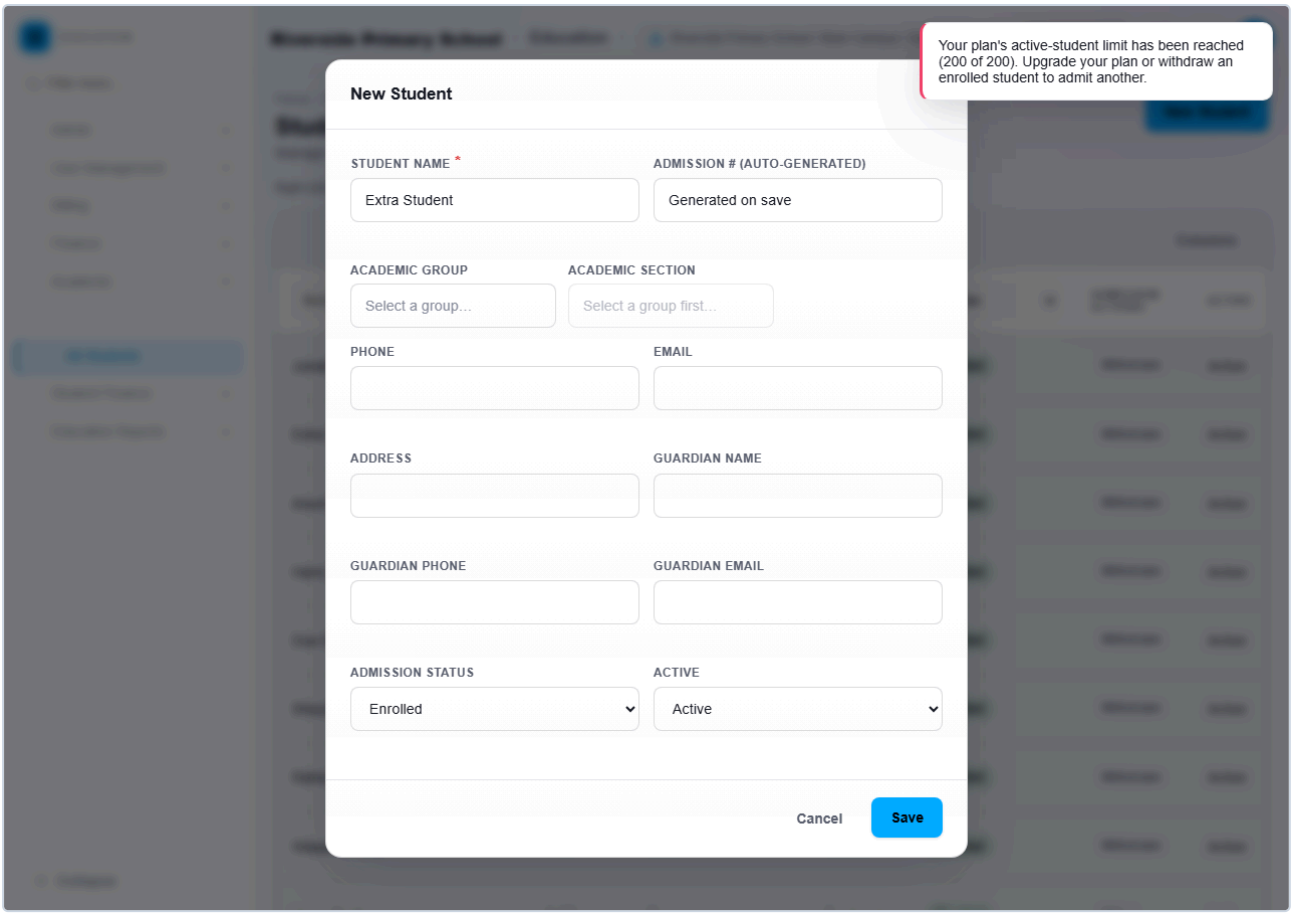
- A billable Student is a student who is **enrolled**, **active** and **not deleted**.
- Inquiry, Test, Admitted and Rejected records do not use up capacity.
- You can see usage under **Billing**, **Subscriptions**, **Subscription & Plans**, **My Plan**.



This school is using 200 of its 200 student places.

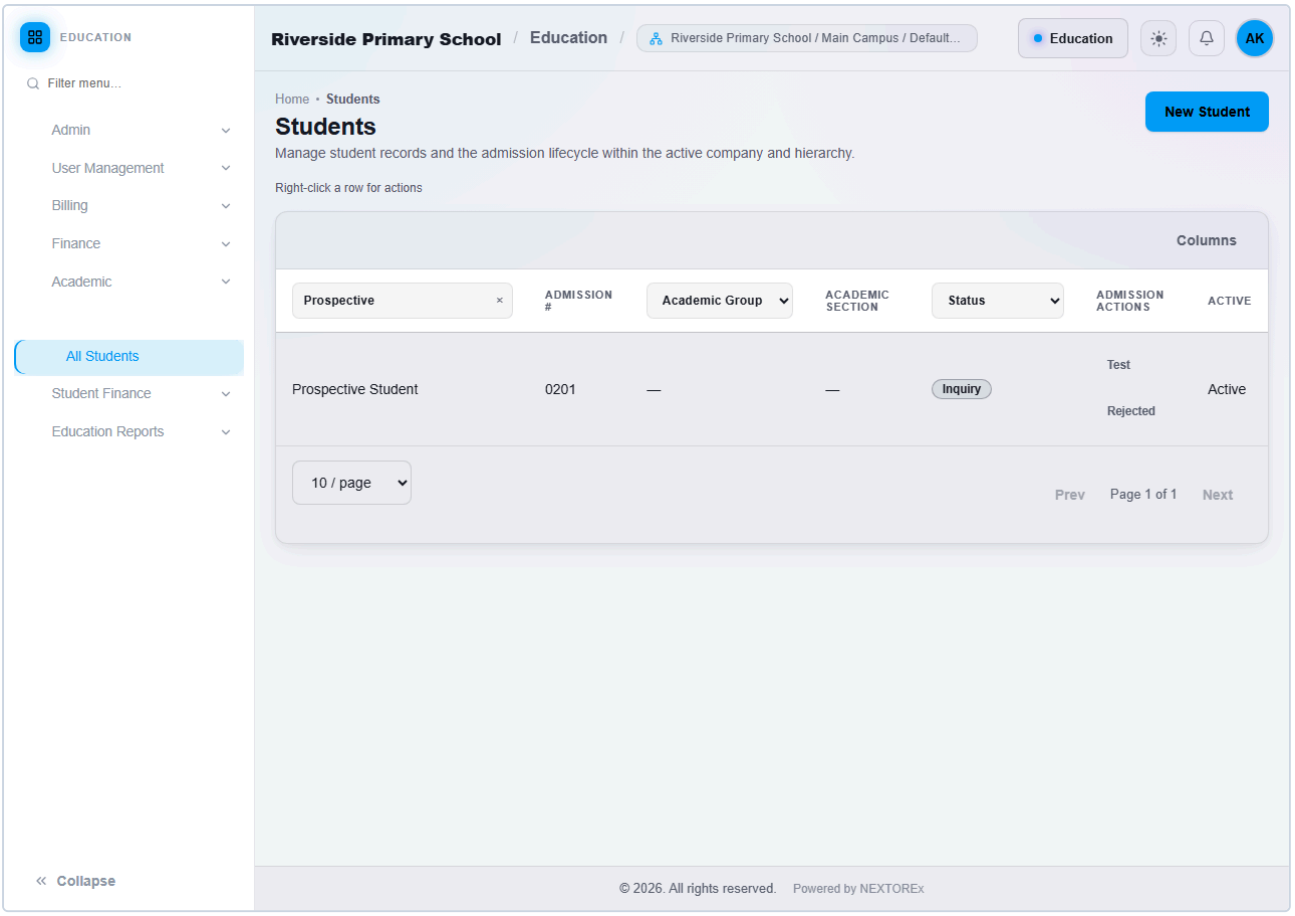
When the limit is reached:

- Your existing students and data stay safe and keep working.
- You can still record inquiries, edit students, take attendance and collect fees.
- You cannot add or re-activate another enrolled student until a place becomes free or you upgrade.



Saving an enrolled student at the limit is refused with a clear message.

To free a place, withdraw a student who has left. To increase the limit, move to a larger package.



An inquiry can still be saved at the limit because it does not use a student place.

If you move to a smaller package than the number of students you already have, **no student is deleted**. For example, a school with 600 students on a 200-student package keeps all 600, but no new enrolled student can be added until the number falls below the limit or the package is upgraded.

Important rules

- Pick the Group first, then the Section.
- Admission status moves forward only. A Rejected or Withdrawn record is final.
- Deleting a student removes the record from your lists and it no longer counts toward the limit.

Common mistakes

- Saving a student as **Enrolled** before you are ready. Use **Inquiry** until the admission is confirmed.
- Closing the login window without copying the one-time password.
- After a refused save, trying a different record in the same window. Close the window and open **New Student** again.

Related guides

- Education getting started and academic structure
- Fees, scholarships, waivers and fee generation
- Student attendance

- Education plans, limits and combining apps

Fees, scholarships, waivers and fee generation

Set up a Fee Structure for a Group, assign partial scholarships or a full waiver, and generate each month's student fees without creating duplicates.

Plan: Education Essentials and above

What this does

A **Fee Structure** says how much students in one Academic Group pay and how often. When you **generate** fees, NEXTOREx creates one fee invoice for every student in that Group. A **scholarship** lowers what one student pays. A scholarship of 100 percent is a **waiver**: the student is recorded as waived and no money is owed.

Who can use it

Staff whose role allows Fee Structure, Scholarship and Fee Generation actions, usually the accounts or administration team.

Which package includes it

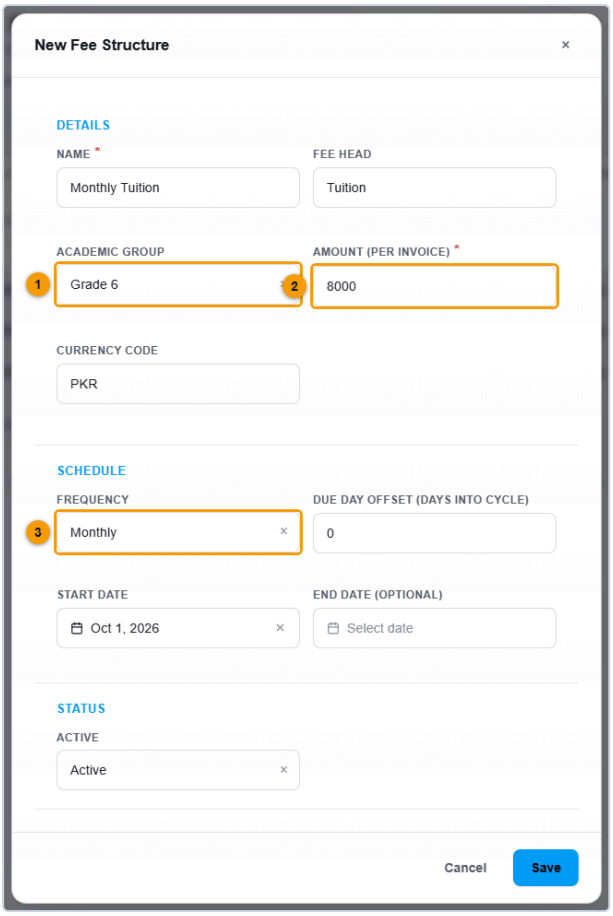
All Education packages include fees, scholarships and waivers.

Where to find it

Open **Student Finance**, then **Fee Structures**.

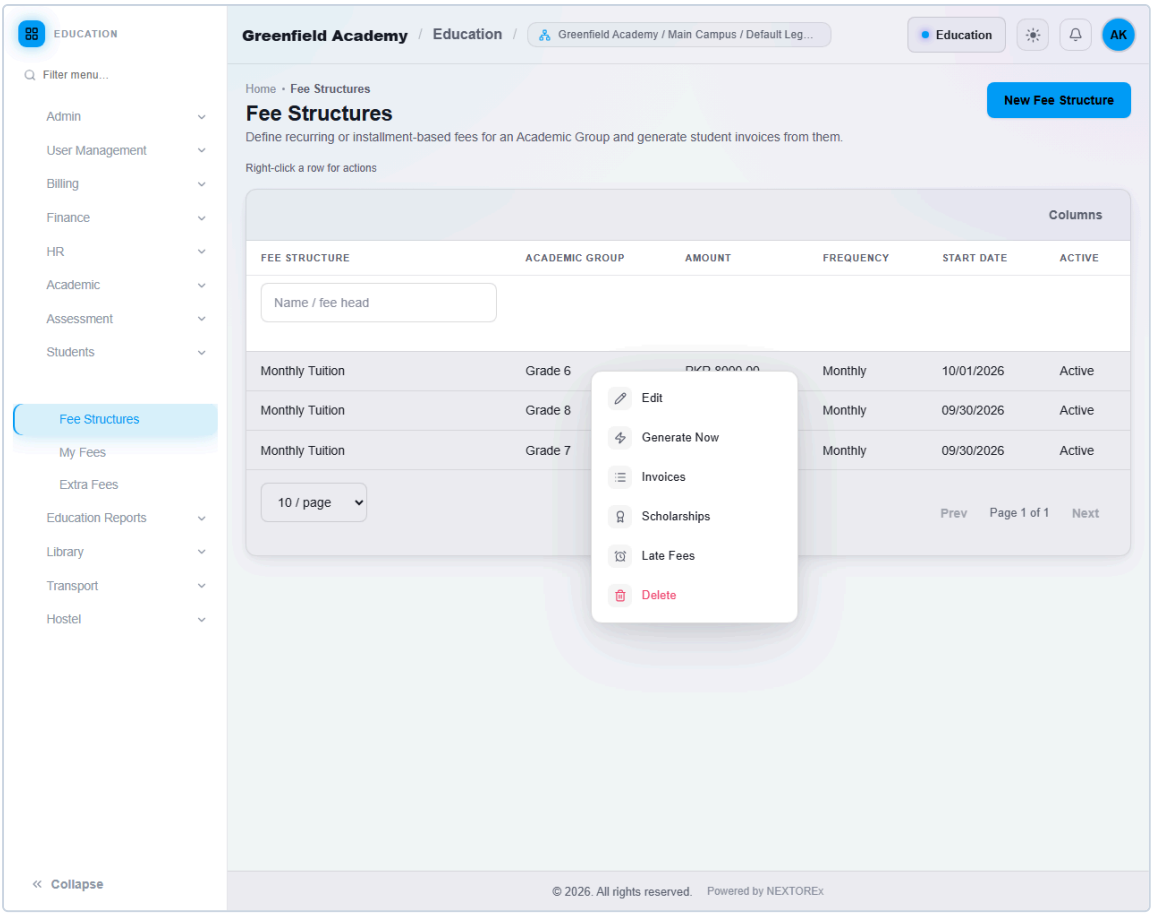
Steps: create a Fee Structure

1. Click **New Fee Structure**.
2. Enter a **Name**, for example `Monthly Tuition`, and an optional **Fee Head**, for example `Tuition`.
3. Choose the **Academic Group** (1). The fee is charged to the students of this Group.
4. Enter the **Amount (per invoice)** (2).
5. Type the **Currency Code**, for example `PKR`. If you leave it empty the fee is created in US dollars, so always type your own currency.
6. Under **Schedule**, choose the **Frequency** (3): one-off, monthly, termly or installments. For installments, also enter how many.
7. Set the **Due Day Offset (days into cycle)** and the **Start Date**. An **End Date** is optional.
8. Click **Save**.



A monthly Fee Structure for one Academic Group. The Group (1), Amount (2) and Frequency (3) matter most.

The list shows every Fee Structure. Right-click a row for its actions.

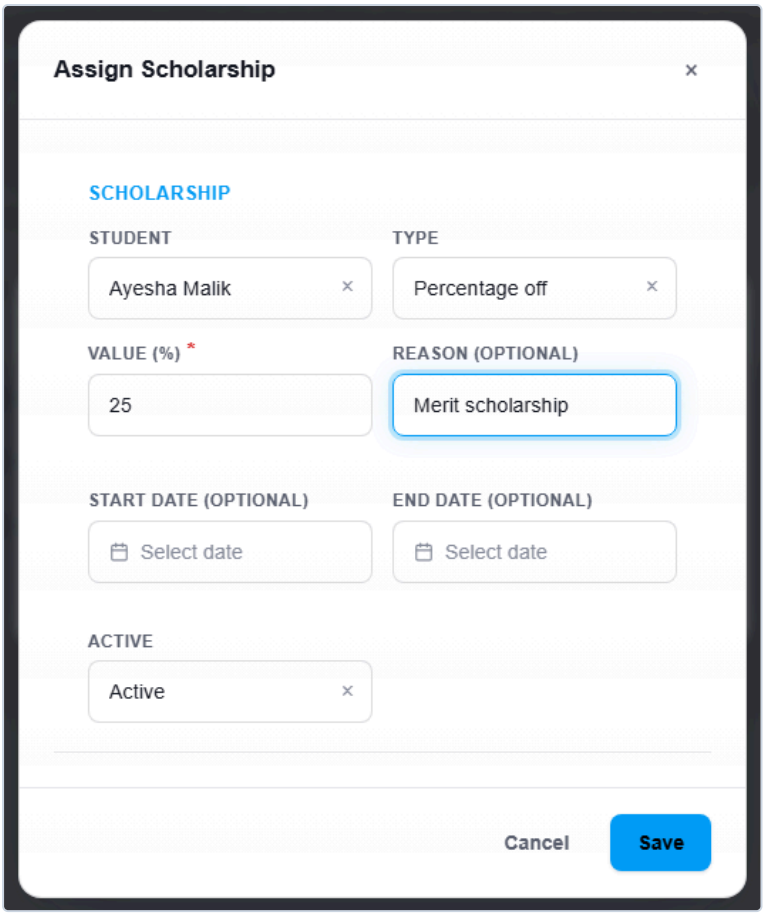


Edit, Generate Now, Invoices, Scholarships, Late Fees and Delete.

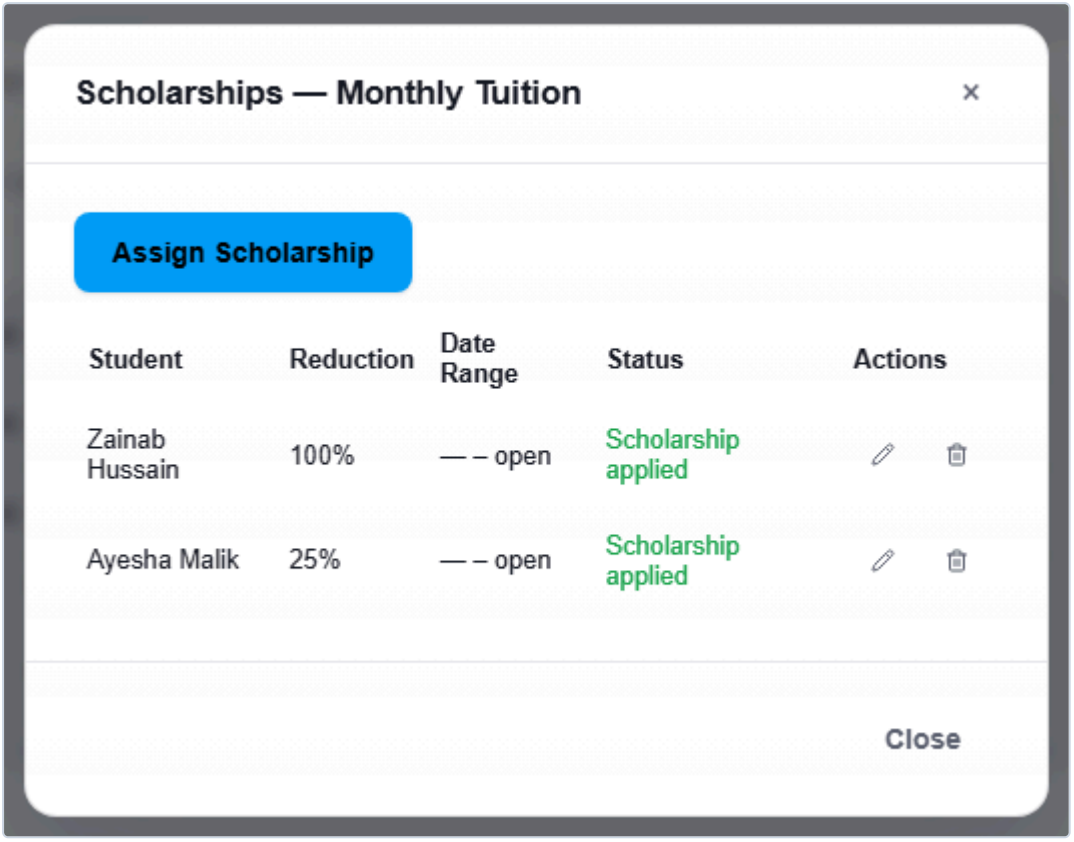
Steps: give a scholarship or a waiver

Assign scholarships **before** you generate the month, so the invoice is created with the right amount.

1. Right-click the Fee Structure and choose **Scholarships**.
2. Click **Assign Scholarship**.
3. Choose the **Student**. Choose the **Type**: **Percentage off** or **Fixed amount off**. Enter the **Value**.
4. Add a **Reason** if you want. You can also set a start and end date.
5. Click **Save**.



A 25 percent scholarship with a reason.



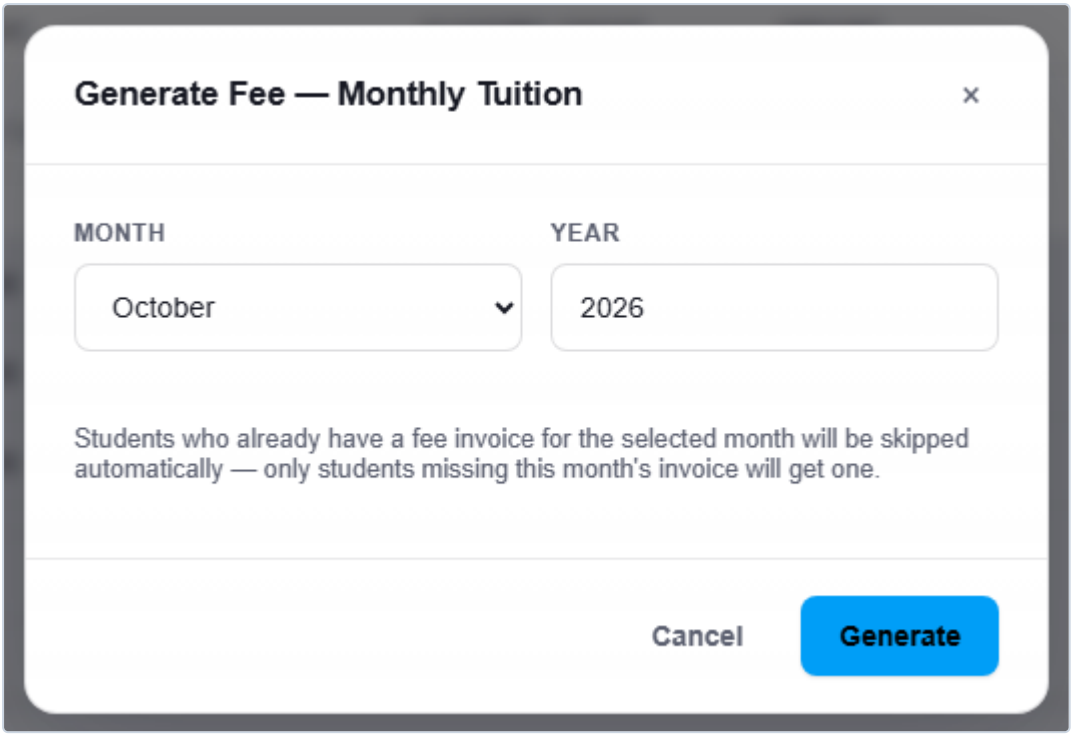
The Scholarships window lists each student's scholarship for this Fee Structure.

What each kind does:

Kind	What the student sees
Partial scholarship, for example 25 percent	The invoice is created for the full amount and a credit note lowers the amount due. A fee of 8,000 with a 25 percent scholarship shows 6,000 still due.
100 percent scholarship (waiver)	**No invoice and no credit note are created.** The fee is recorded as **Waived** with nothing due.

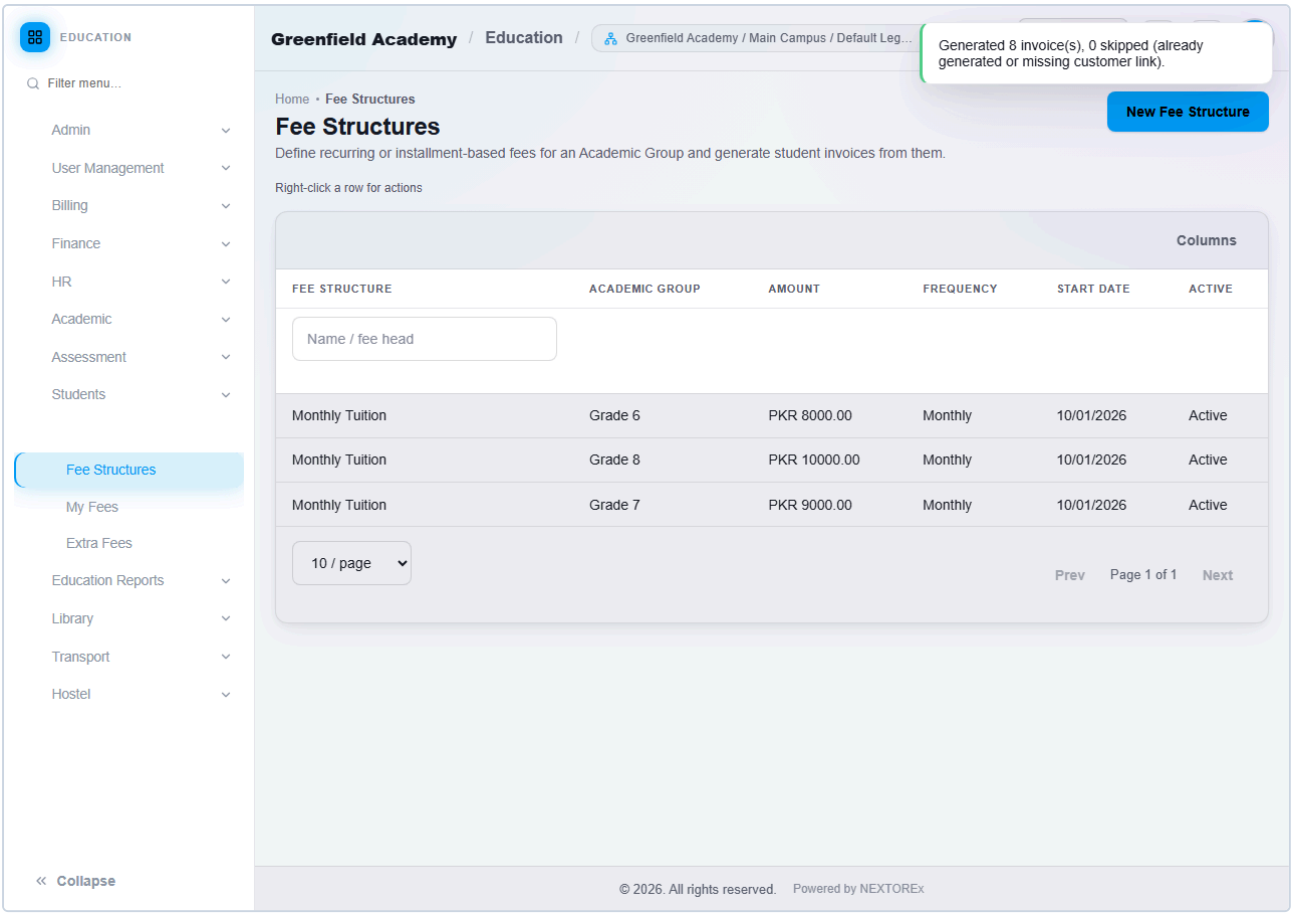
Steps: generate fees

1. Right-click the Fee Structure and choose **Generate Now**.
2. Choose the **Month** and **Year**.
3. Click **Generate**.



Choose the month and year to generate.

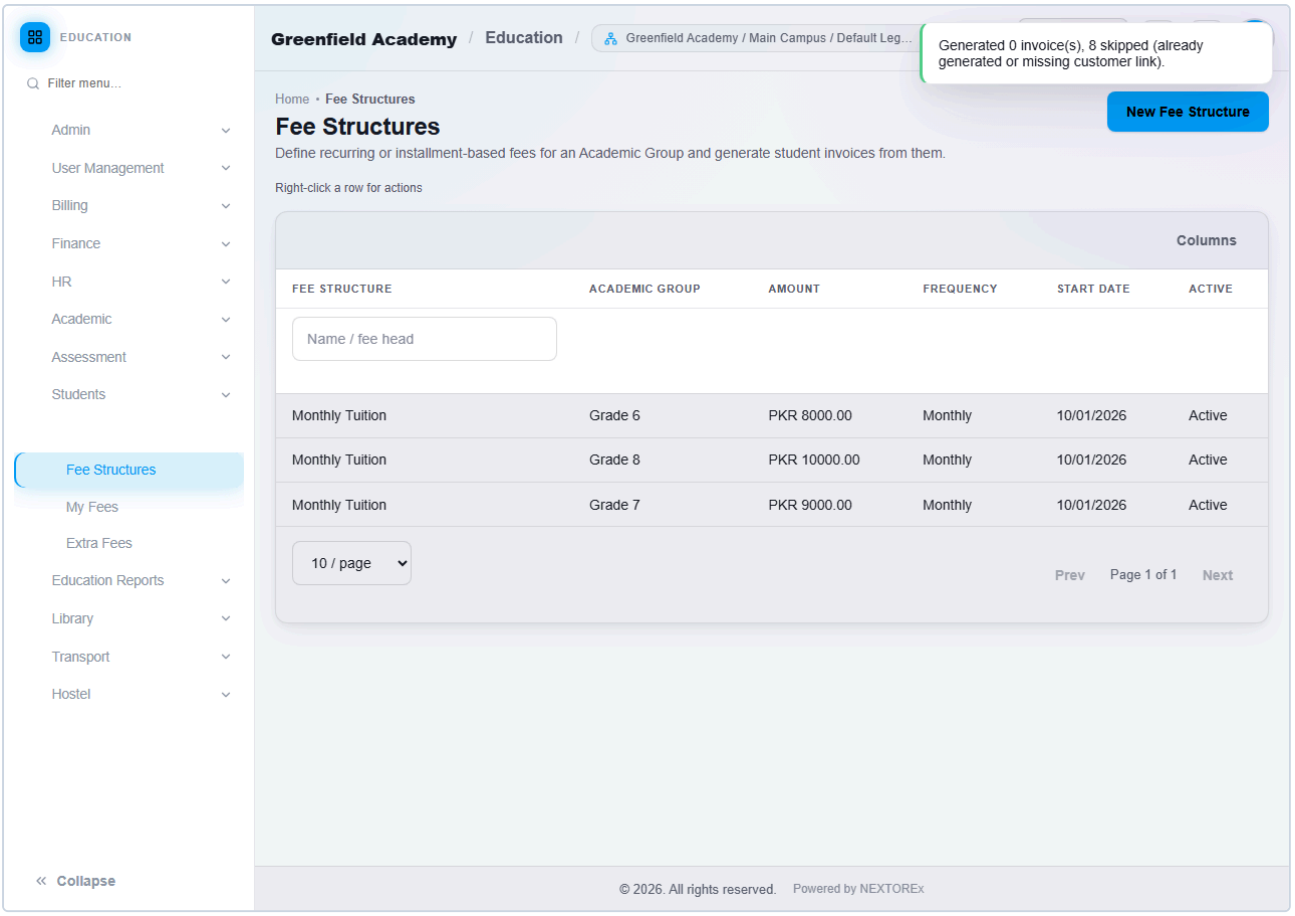
A message tells you how many invoices were created and how many were skipped.



Eight invoices were created for the eight students of the Group.

Generating twice is safe

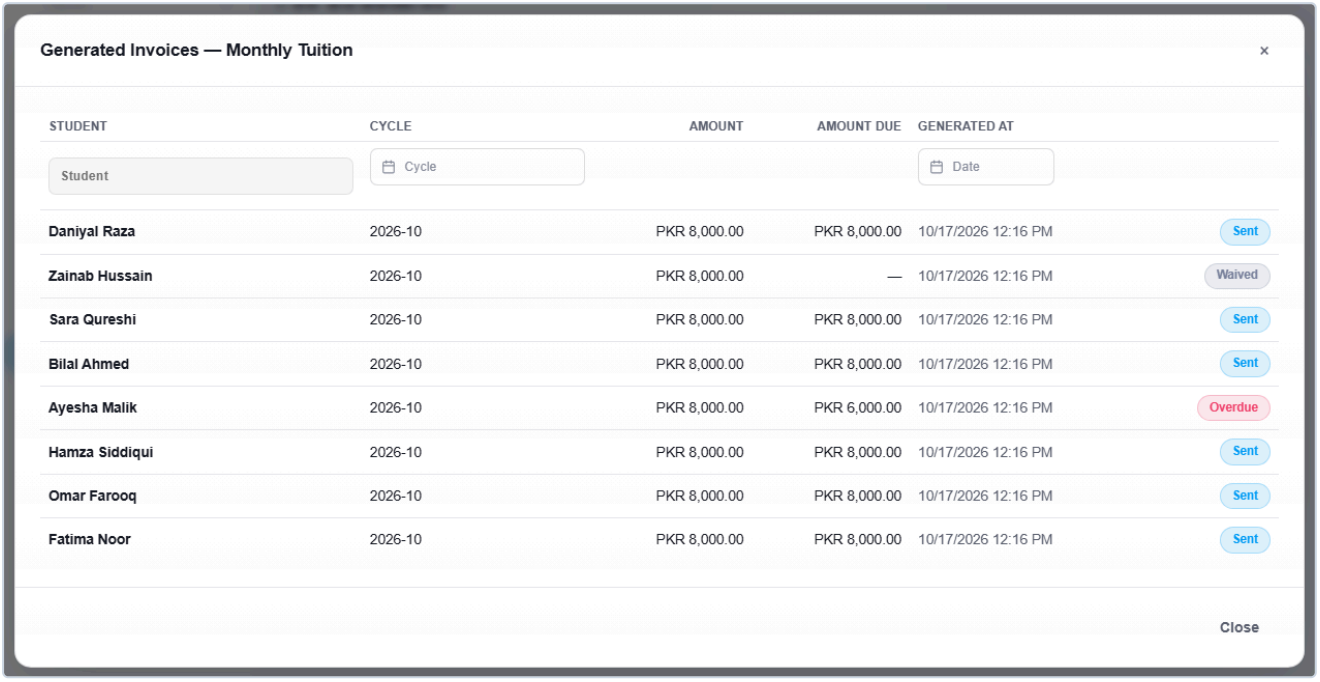
Students who already have a fee invoice for the selected month are **skipped automatically**. Only students who are missing that month's invoice get one. You can generate again at any time without charging anyone twice.



The second run creates nothing and reports the students it skipped.

See what was generated

Right-click the Fee Structure and choose **Invoices**. Each row shows the student, the month, the amount, the amount still due and the status. A waived student shows **Waived** and no amount due.



One partly paid scholarship student (6,000 due) and one waived student, among the invoices of the month.

What happens next

Collect the money with a receipt. See Student payments and fee statement. Look at who still owes money with the **Dues only** filter of the Fee Collection report.

Other fee tools

- **Late Fees**: right-click a Fee Structure and choose **Late Fees**. A late fee rule has a grace period and either a percentage or a fixed amount. Overdue fee invoices are not charged anything unless you create a rule.
- **Extra Fees**: open **Student Finance**, then **Extra Fees** to charge a one-off fee with a reason and an amount to chosen students, to a whole Group or Section, or to enter each student's own opening balance.
- **Transport and hostel fees** are generated from their own screens. See Transport and Hostel.

Important rules

- Fees are charged to the students of the Fee Structure's Group. Students without a Group are not included.
- Use the same currency for all of your fees.
- A scholarship does not change an invoice that was already generated. Assign it first, then generate.
- Online fee payment is not part of Education. Fees are collected by recording a receipt.

Common mistakes

- Forgetting the **Currency Code**. Type it every time.
- Assigning a scholarship after the month was generated and expecting the existing invoice to change.
- Entering 100 percent as a normal discount and then looking for an invoice. A full scholarship creates no invoice by design. Look for the **Waived** status instead.

Related guides

- Student payments and fee statement
- Education receipt and payment vouchers
- Education reports and dashboard

Student payments and fee statement

Record a fee payment from a student, see what each student still owes in the Fees tab, and find every unpaid invoice with the Dues only filter.

Plan: Education Essentials and above

What this does

This guide shows how to record the money a student pays, how to read a student's **fee statement**, and how to list everyone who still owes fees.

Who can use it

Staff whose role can create vouchers and view students. Students can see their own invoices in **My Fees**.

Which package includes it

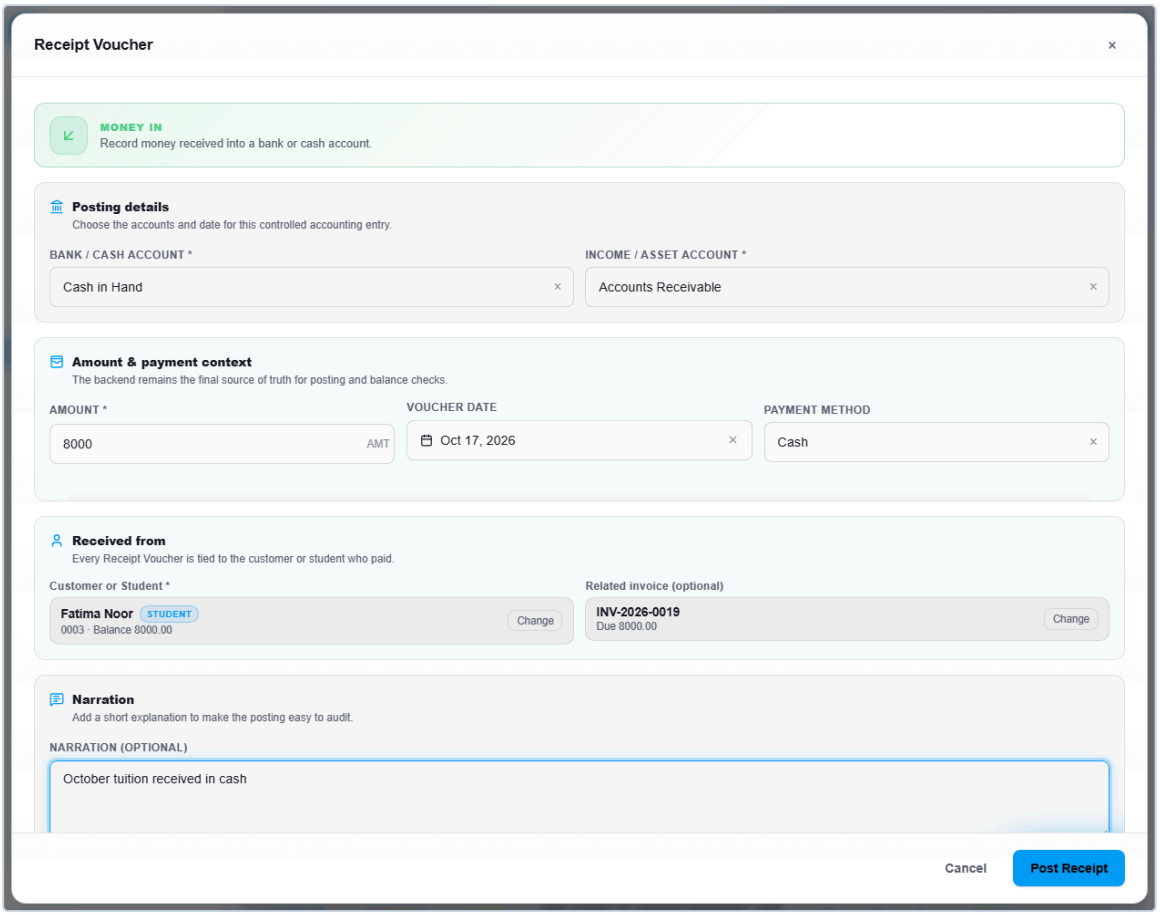
All Education packages. Recording receipts uses the shared finance screens that every Education package includes. This is not the full ERP or POS accounting application. See Education receipt and payment vouchers.

Where to find it

- The fee statement is the **Fees** tab of a student's profile: **Students**, **All Students**, then right-click the student and choose **View Details**.
- Payments are recorded in **Finance**, then **Voucher**, using **Receipt**.
- Dues are listed in **Education Reports**, then **Fee Collection Report**.

Steps: record a payment

1. Open **Finance**, then **Voucher**, and click **Receipt**.
2. Choose the **Bank / Cash Account** that receives the money, for example **Cash in Hand**.
3. For **Income / Asset Account**, choose **Accounts Receivable**. Fee invoices are held there until they are paid.
4. Enter the **Amount**.
5. In **Customer or Student**, type the student's name and choose the student. A **STUDENT** badge shows who you picked, with the admission number and the current balance.
6. In **Related Invoice**, type `INV` and choose the invoice that is being paid. Only the invoices of the student you chose are offered.
7. Click **Post Receipt**.



A receipt for a student, linked to the invoice it pays.

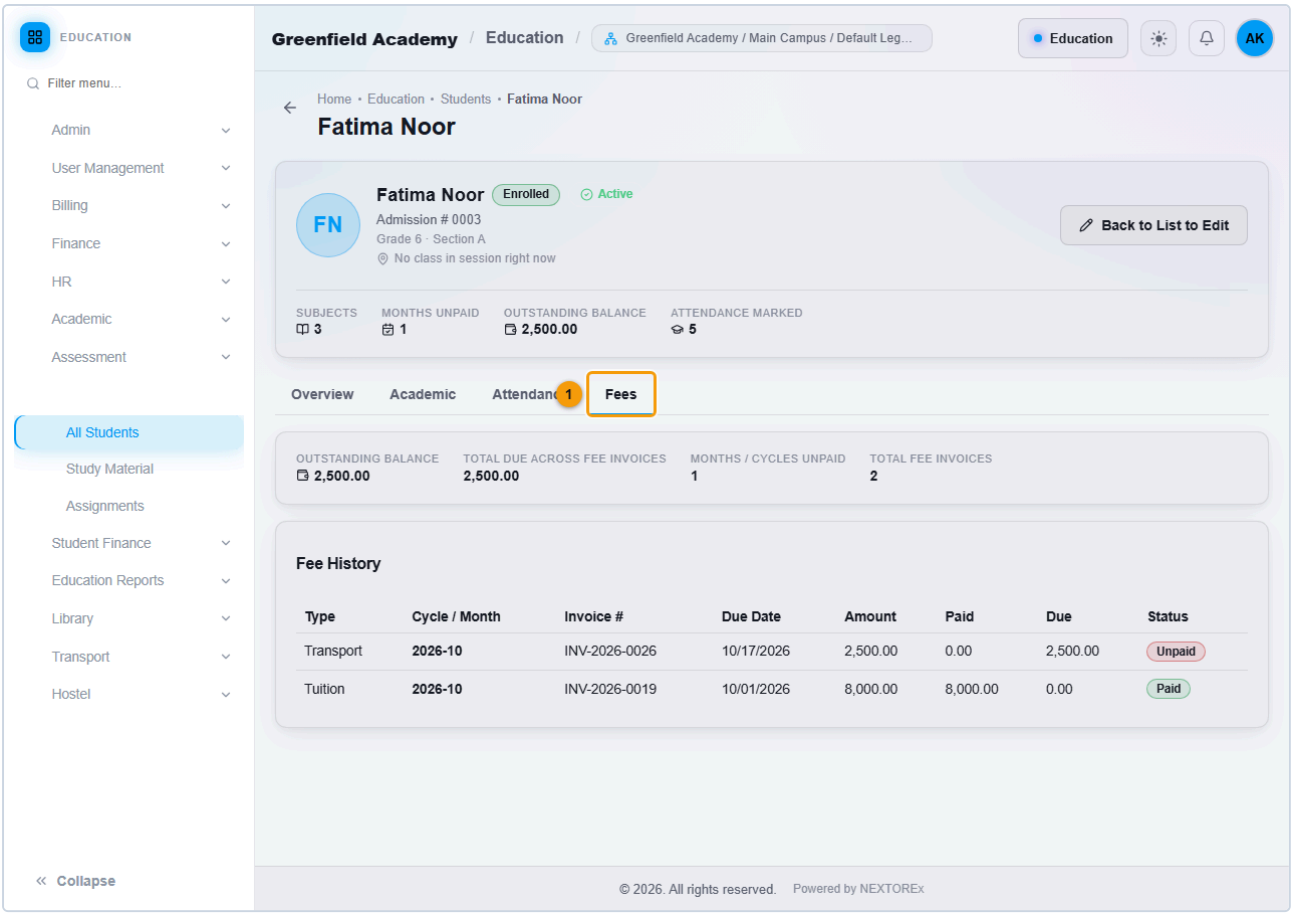
The invoice is updated straight away. Paying the full amount shows **Paid**. Paying less shows **Partially Paid** with the rest still due.

Read a fee statement

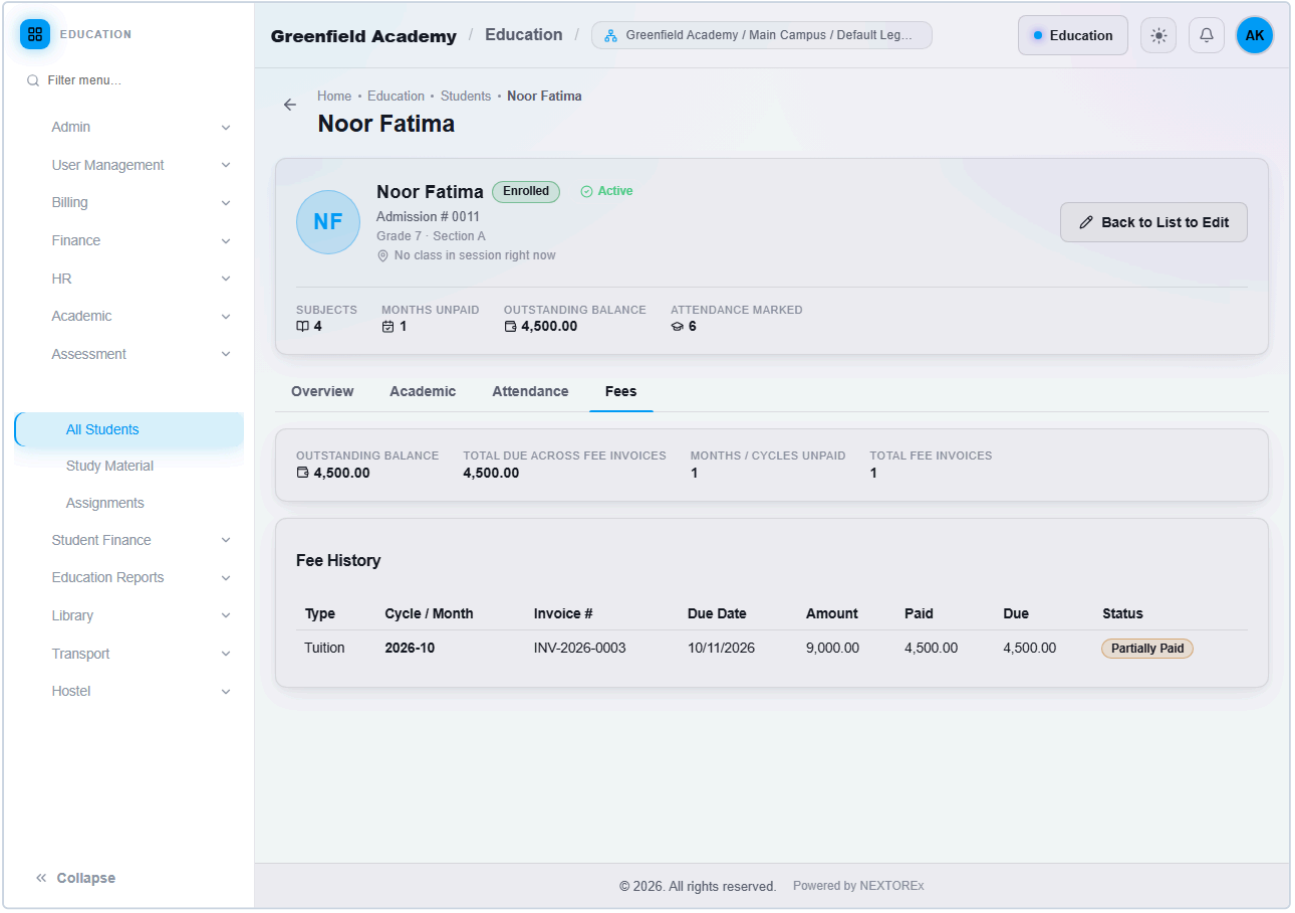
Open the student's profile and click the **Fees** tab (1). The summary shows the **Outstanding Balance**, the total due across fee invoices, the number of months or cycles still unpaid and the number of fee invoices. **Fee History** lists every invoice with its type, month, invoice number, due date, amount, paid, due and status.

Fee History includes every kind of Education charge: tuition, transport, hostel, library fines, late fees and extra fees.

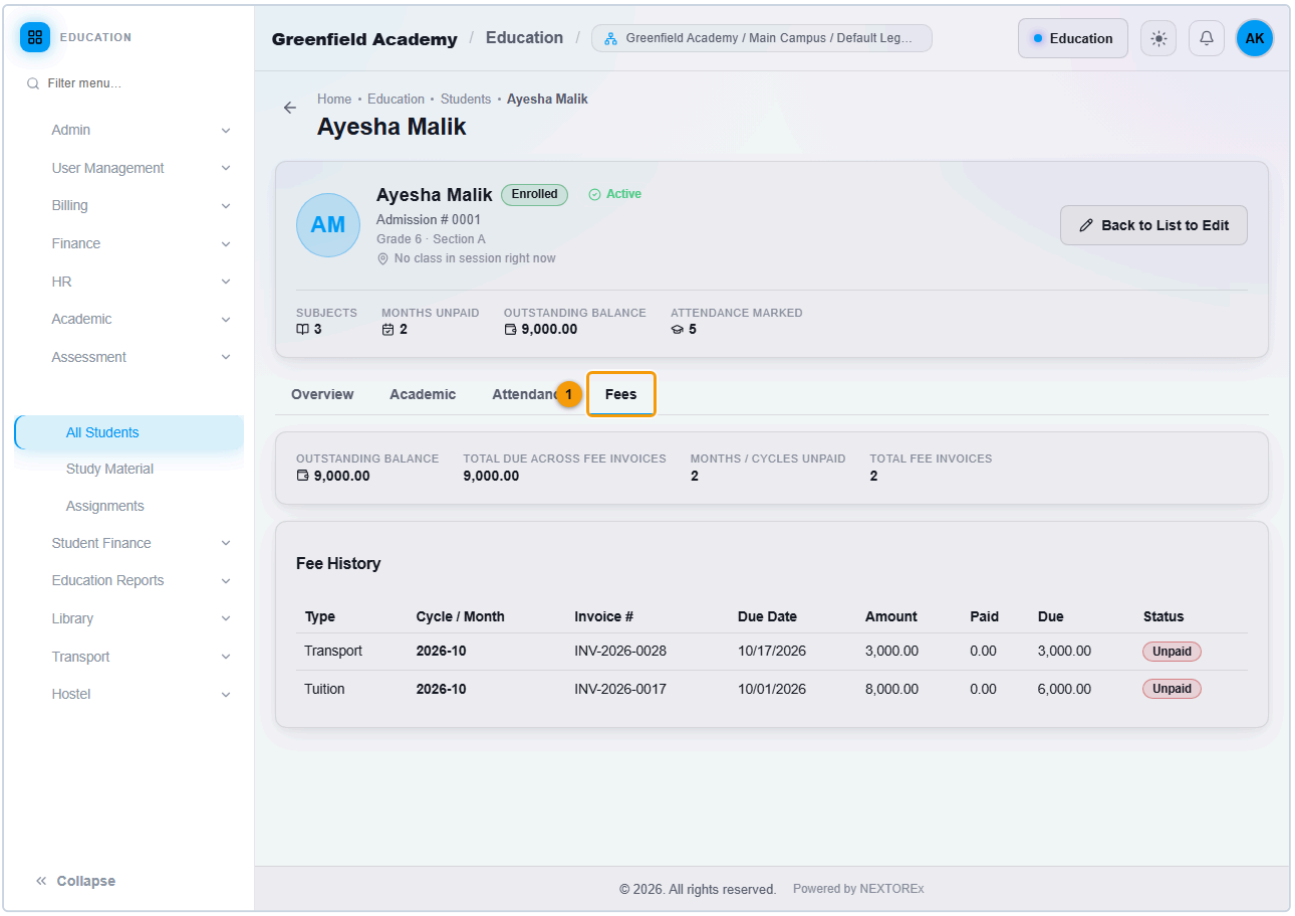
Status	Meaning
Paid	The invoice is fully paid.
Partially Paid	Some money has been received. The rest is in the **Due** column.
Unpaid	Nothing has been received.
Waived	The fee was fully waived by a 100 percent scholarship. Nothing is due.



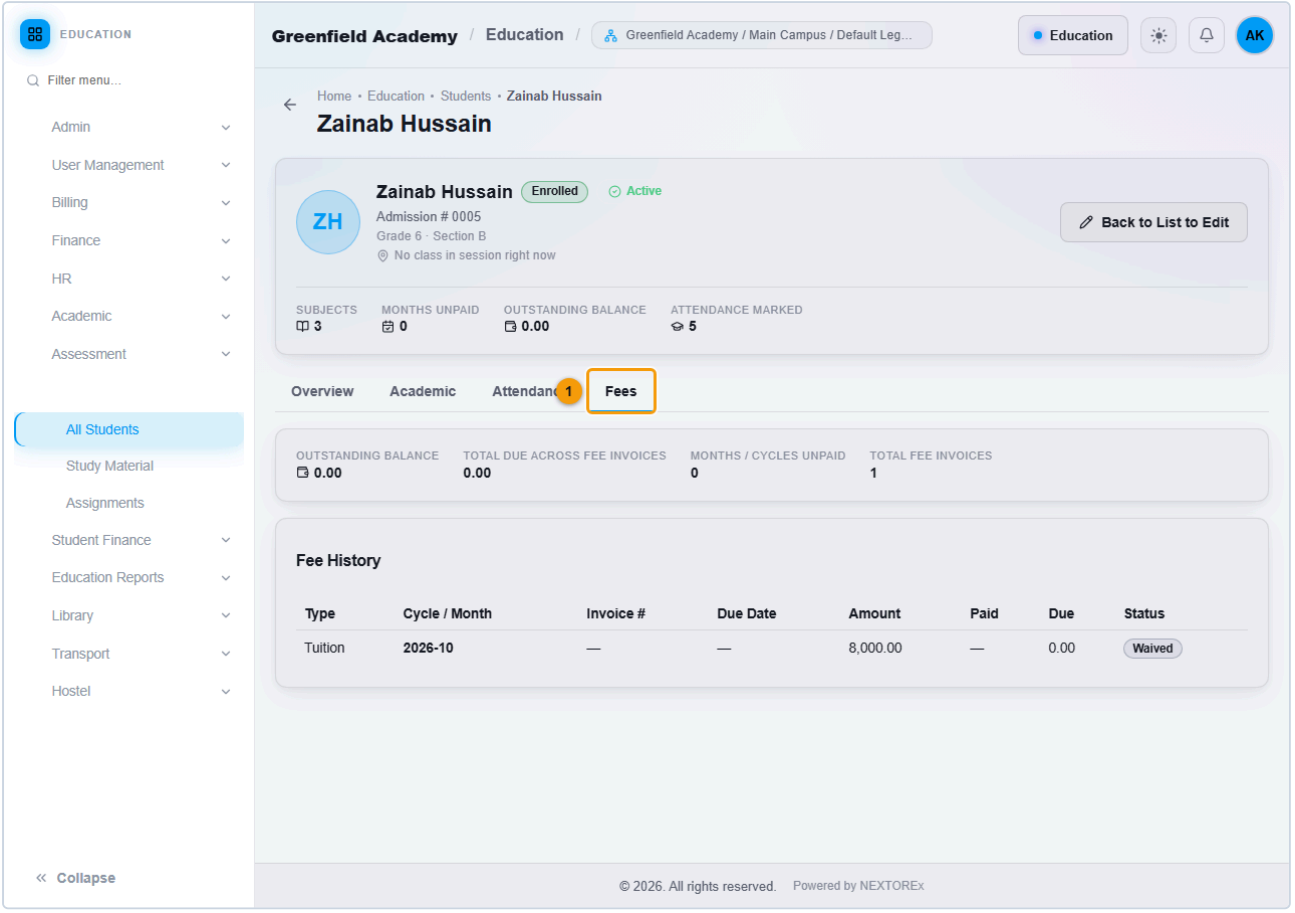
The tuition invoice is Paid. The separate transport invoice is still Unpaid.



A part payment: 4,500 of 9,000 received, 4,500 still due.



With a 25 percent scholarship the invoice is 8,000 and the amount due is 6,000.

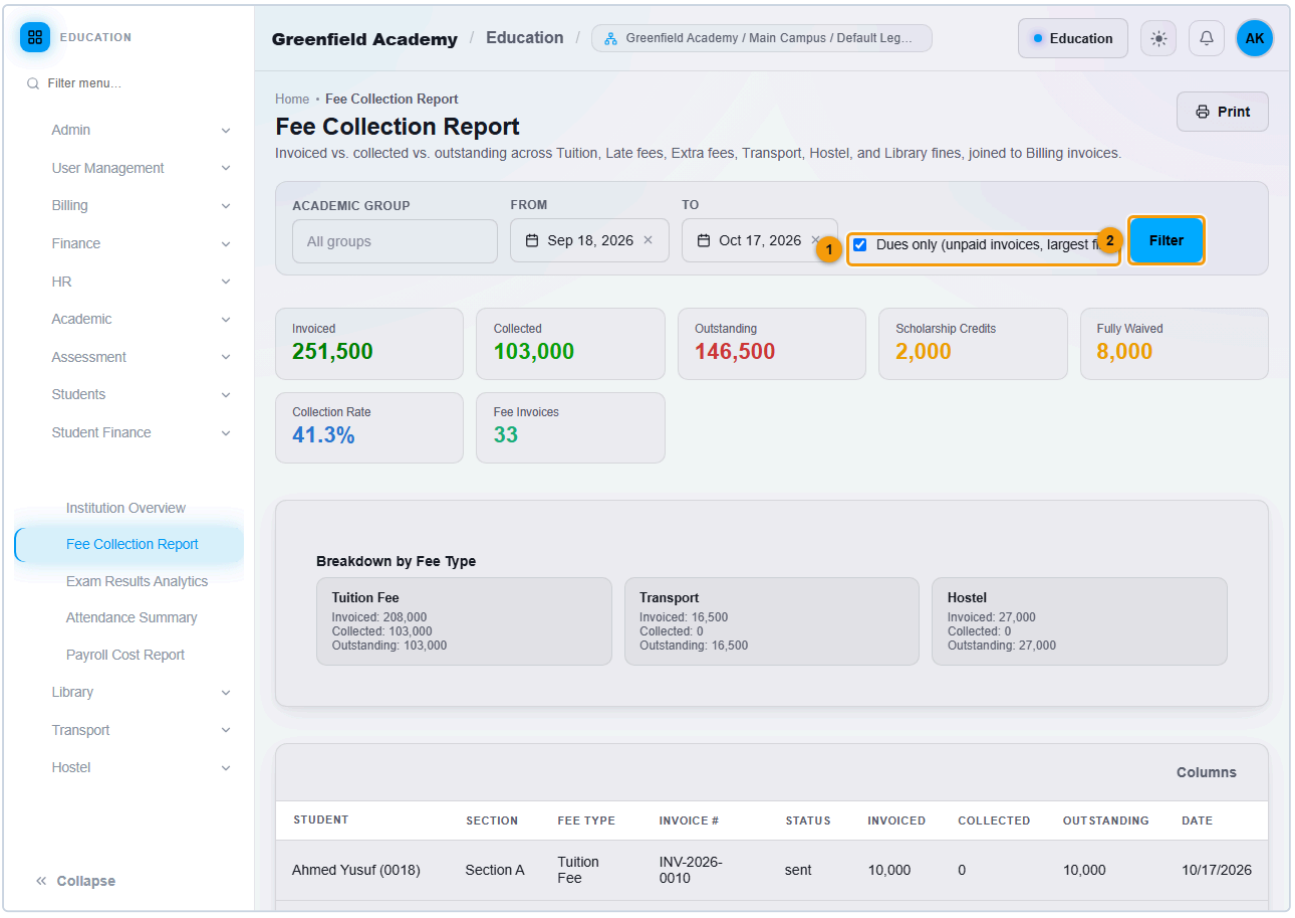


A fully waived fee shows Waived, no invoice number and nothing due.

Find everyone who owes fees

1. Open **Education Reports**, then **Fee Collection Report**.
2. Choose the dates and, if you want, an **Academic Group**.
3. Tick **Dues only (unpaid invoices, largest first)** (1).
4. Click **Filter** (2).

The table lists only unpaid invoices, largest amount first. The cards at the top show the totals invoiced, collected and outstanding, the scholarship credits and the fully waived amount.



Tick Dues only (1) and click Filter (2).

What students see

A student who signs in to the Student Portal opens **Student Finance**, then **My Fees**. It lists their own invoices and payments only.

Important rules

- A receipt linked to a student's invoice must be credited to **Accounts Receivable**. NEXTOREx refuses any other account for a student invoice.
- A receipt can only be linked to an invoice that belongs to the student you chose.
- A receipt that is wrong cannot be edited. Reverse it from the voucher list and post a new one. See Education receipt and payment vouchers.

Common mistakes

- Choosing the wrong student with a similar name. The student's admission number is shown under the name.
- Leaving **Related Invoice** empty, so the payment is not matched to a fee. Choose the invoice.
- Looking for a waived fee in the unpaid list. A waived fee is not owed, so it does not appear under **Dues only**.

Related guides

- Fees, scholarships, waivers and fee generation
- Education receipt and payment vouchers
- Education reports and dashboard

Education receipt and payment vouchers

Record money received from students and money paid to staff in Education, choose the right person in one search box, and understand why a payment can be refused.

Plan: Education Essentials and above

What this does

A **voucher** is a record of money moving. In Education you use two kinds every day:

- **Receipt**: money received, for example a student paying fees.
- **Payment**: money paid out, for example a staff member's advance.

Education can record these transactions on its own. You do not need to buy the ERP or POS application for it.

Who can use it

Staff whose role allows creating and viewing vouchers, normally the accounts team.

Which package includes it

All Education packages include receipts and payments for student and staff money. Payments to staff need the staff features of Education Standard or Education Campus, because Essentials has no staff records.

What Education includes, and what it does not

Education includes the shared finance screens it needs: **Finance**, **Voucher**, the account and bank lists you can view, and ledgers for students and staff. It is **not** the ERP or POS accounting application. It has no sales orders, POS checkout, product stock or purchasing. If you also buy the ERP/POS application, those screens appear in the same account. See Education plans, limits and combining apps.

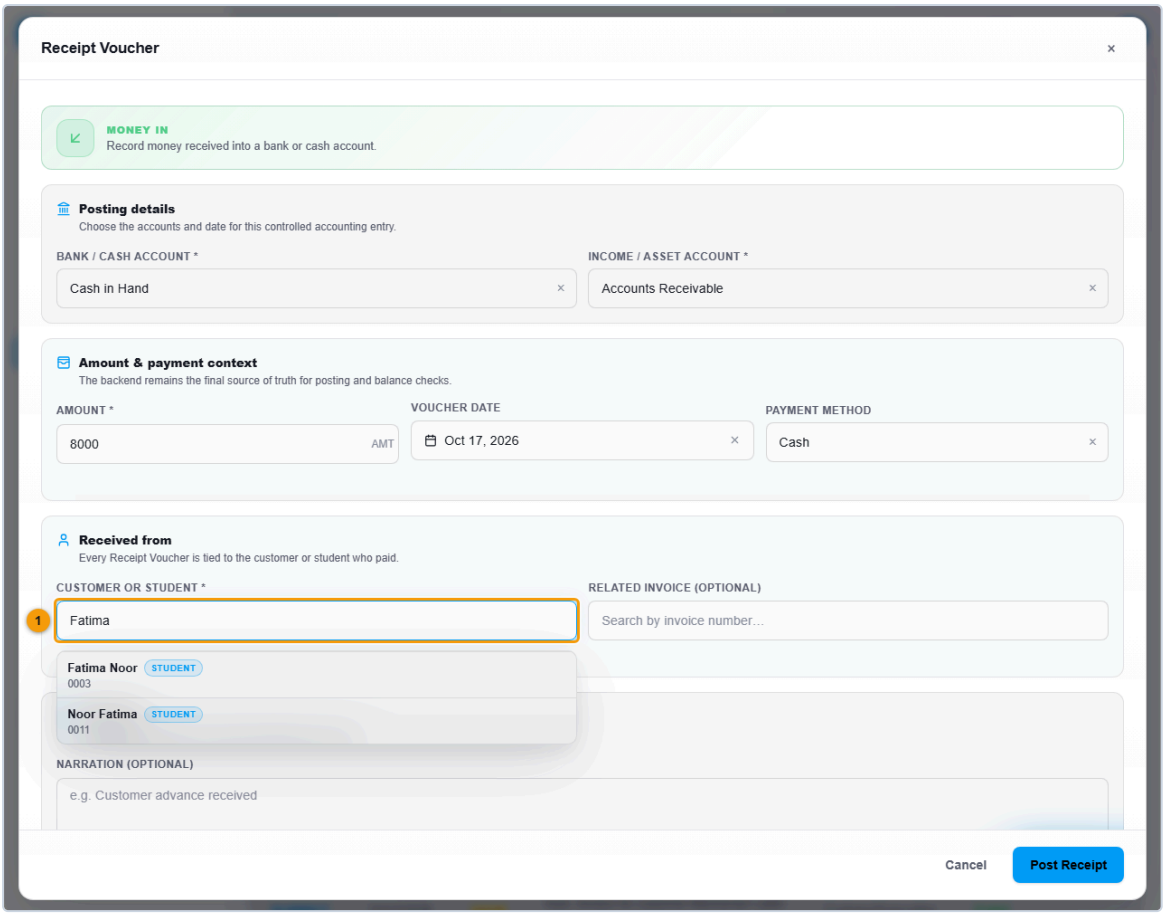
Where to find it

Open **Finance**, then **Voucher**. Use the **Receipt** and **Payment** buttons at the top.

Steps: a receipt from a student

The full steps are in Student payments and fee statement. In short:

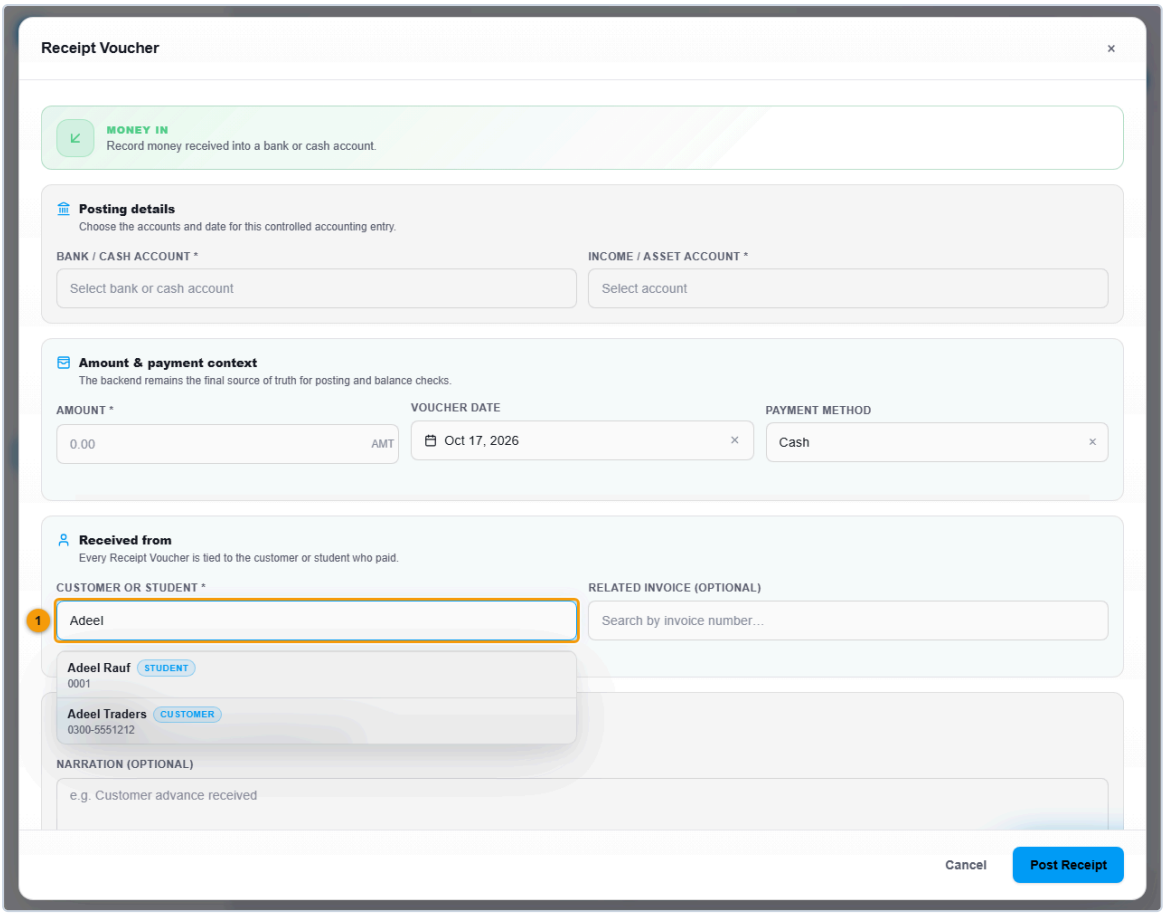
1. Click **Receipt**.
2. Choose the **Bank / Cash Account** and the **Income / Asset Account**.
3. Enter the **Amount**.
4. Type the student's name in **Customer or Student** (1) and choose the person.
5. Choose the **Related Invoice** if the money pays a fee invoice.
6. Click **Post Receipt**.



Type part of the name. Each match shows a STUDENT badge and the admission number.

One box for students and customers

The **Customer or Student** box searches both lists at once and marks each result with a badge. If your organisation uses only Education, you see students. If you also use the ERP/POS application, you also see customers, and the badge tells them apart.

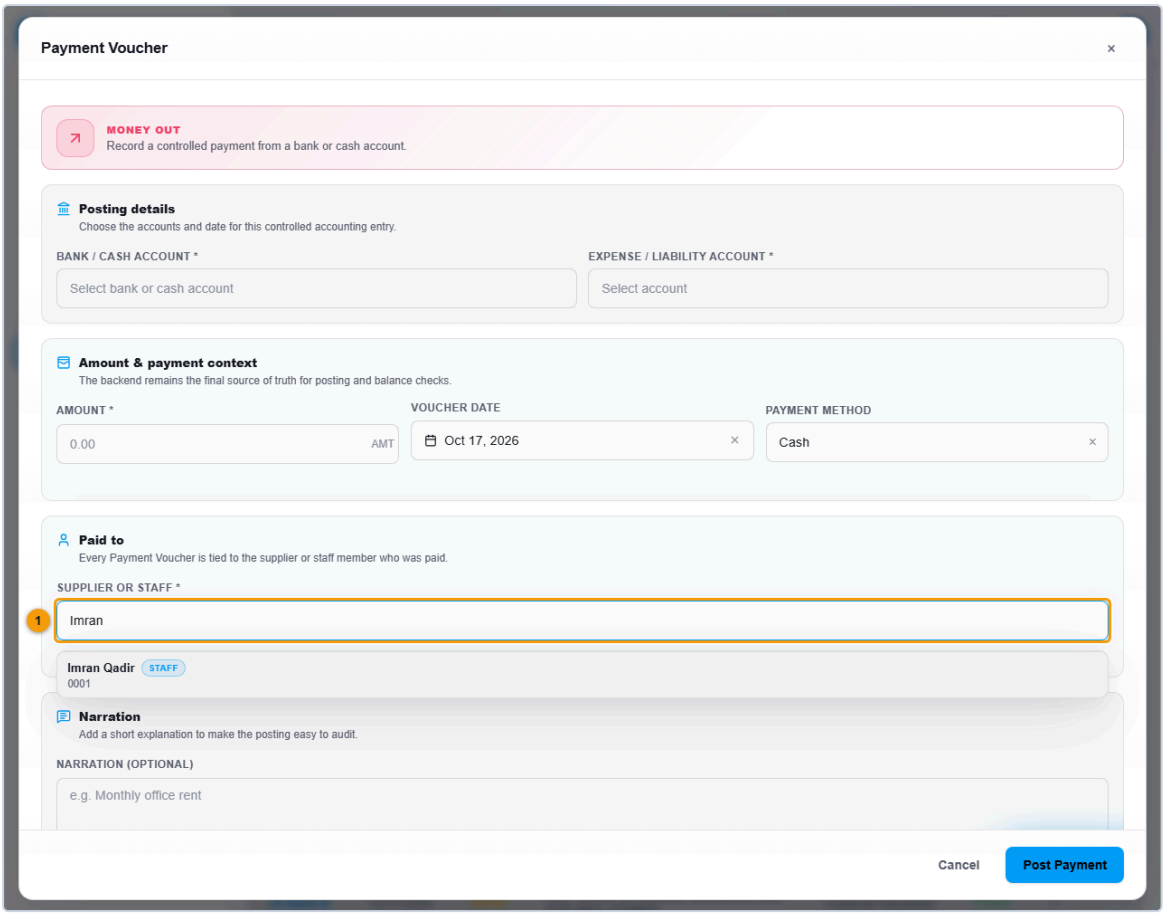


The same search finds a student and a customer with a similar name. The badges show which is which.

Steps: a payment to a staff member

1. Click **Payment**.
2. In **Supplier or Staff** (1), type the person's name. A **STAFF** badge shows a staff member. If you also use the ERP/POS application, suppliers appear here with a **SUPPLIER** badge.
3. Choose **Advance (recoverable)** if the money is an advance you expect to recover, or **Reimbursement (expense)** if it repays the staff member for something they paid for.
4. Choose the **Bank / Cash Account** that pays, enter the **Amount** and click **Post Payment**.

For a staff member, the account can stay empty. NEXTOREx then uses its default staff advance or reimbursement account.

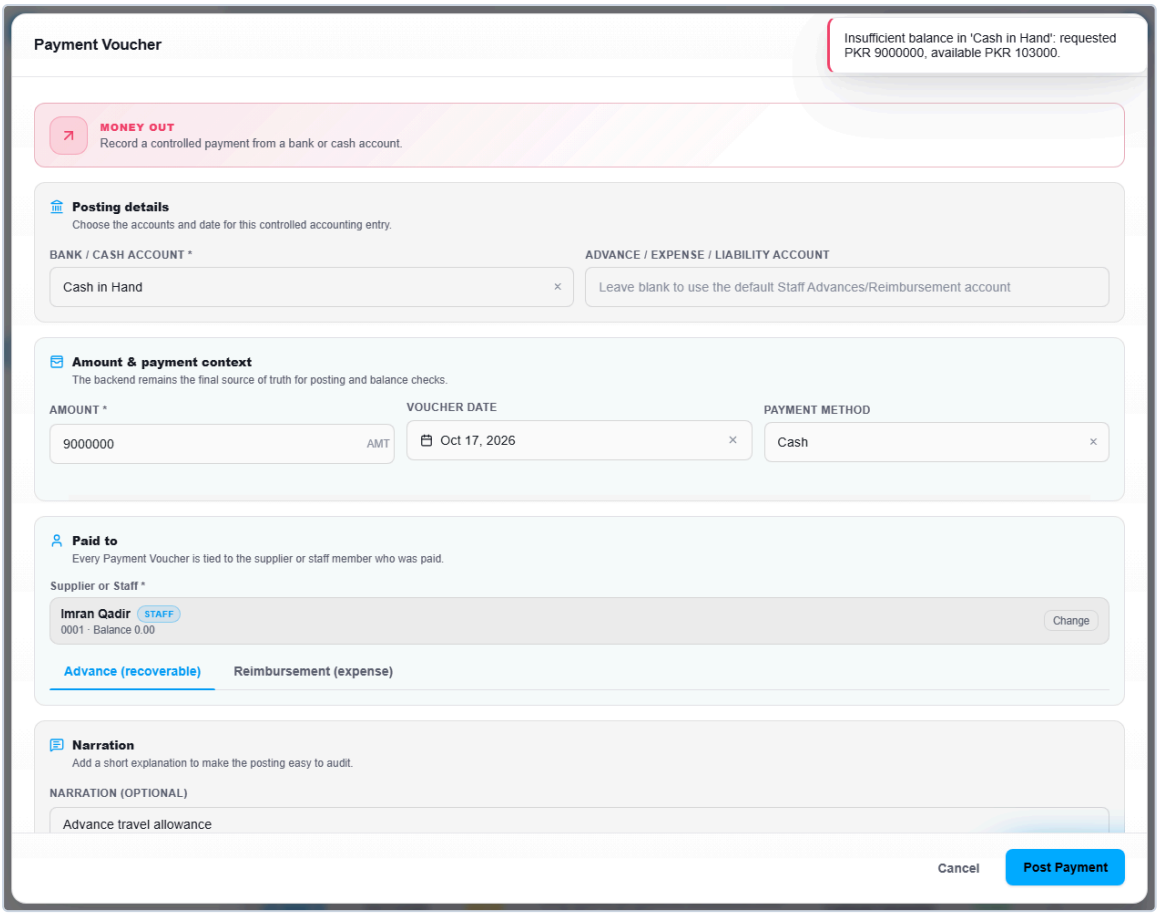


In a payment, the same box searches staff, and suppliers if you use ERP/POS.

Salaries are normally paid from **Payroll**, not from a voucher. See Payroll.

Payments are refused when the money is not there

You cannot pay out more than the account holds. NEXTOREx shows a message such as *Insufficient balance in 'Cash in Hand': requested PKR 9000000, available PKR 103000* and nothing is posted. Money enters the account when you record receipts, for example from students. Check the balance, or choose a different account, and try again.



The payment is refused with the requested and available amounts.

What happens next

The voucher appears in the list. To undo a voucher, right-click it and choose **Reverse voucher**, then post the correct one. Posted vouchers are never edited.

Important rules

- A receipt against a student invoice must go to **Accounts Receivable**.
- A receipt can only be linked to an invoice of the person you chose.
- An overdraft is always refused.
- The list of vouchers shows entries NEXTOREx created automatically, such as one for every fee invoice, as well as the ones you post.

Common mistakes

- Looking for a customer or supplier screen in an Education-only account. Those belong to the ERP/POS application.
- Choosing the wrong account for a student invoice receipt. Choose **Accounts Receivable**.
- Paying salaries by hand-made vouchers instead of using **Payroll**.

Related guides

- Student payments and fee statement
- Payroll
- Vouchers and journal entries

Student attendance

Mark daily attendance for a Section, save it, correct it later, and read the attendance report and summary.

Plan: Education Essentials and above

What this does

Teachers and administrators record who was present, absent, late or on leave for each Section every day. The saved register feeds the attendance report, the attendance summary and each student's profile.

This guide is about **student** attendance. Your staff's own attendance, with Check In, Check Out and leave, is separate. See Staff and staff attendance.

Who can use it

Staff with the **Mark Attendance** permission. People who can view attendance see every Section. A teacher who has been assigned to a Section sees only the Sections they are assigned to.

Which package includes it

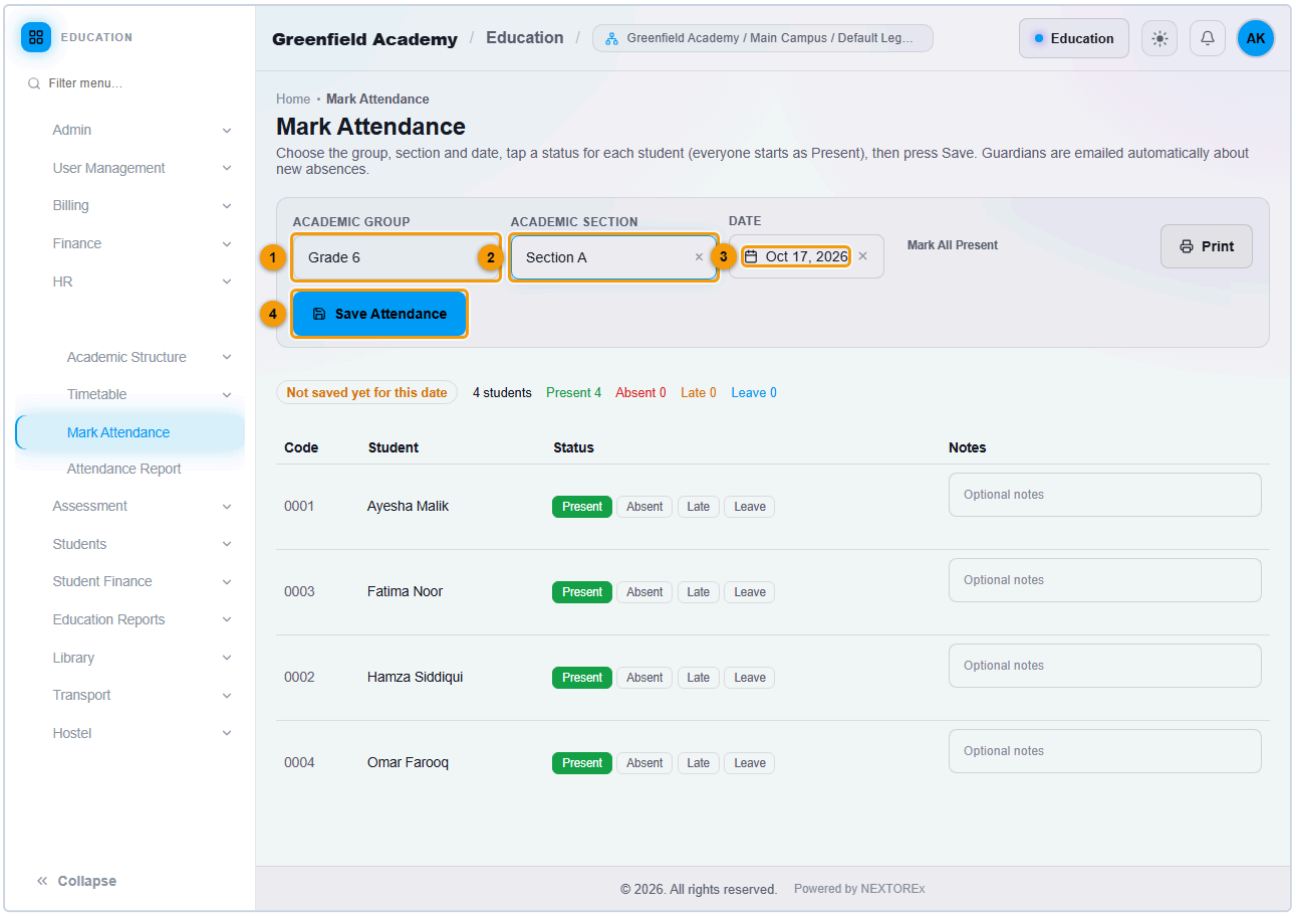
All Education packages.

Where to find it

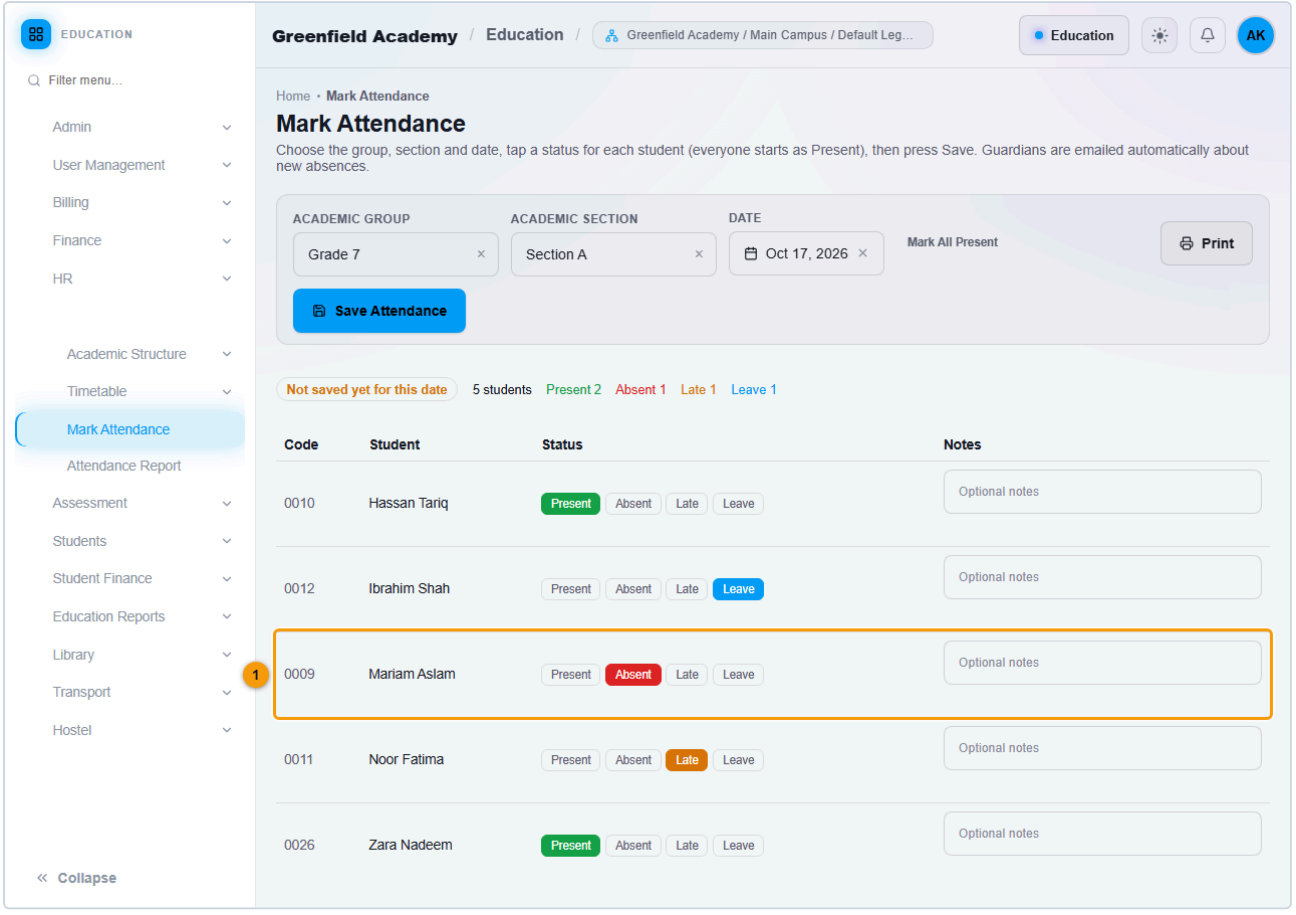
Open **Academic**, then **Mark Attendance** to record a day, or **Attendance Report** to review it. A summary for the whole school is in **Education Reports**, then **Attendance Summary**.

Steps: mark a day

1. Open **Academic**, then **Mark Attendance**.
2. Choose the **Academic Group** (1) and then the **Academic Section** (2).
3. Check the **Date** (3). It starts as today.
4. Everyone starts as **Present**. For each student who was not, click **Absent**, **Late** or **Leave**. Use the **Notes** box for a short remark.
5. Click **Save Attendance** (4).



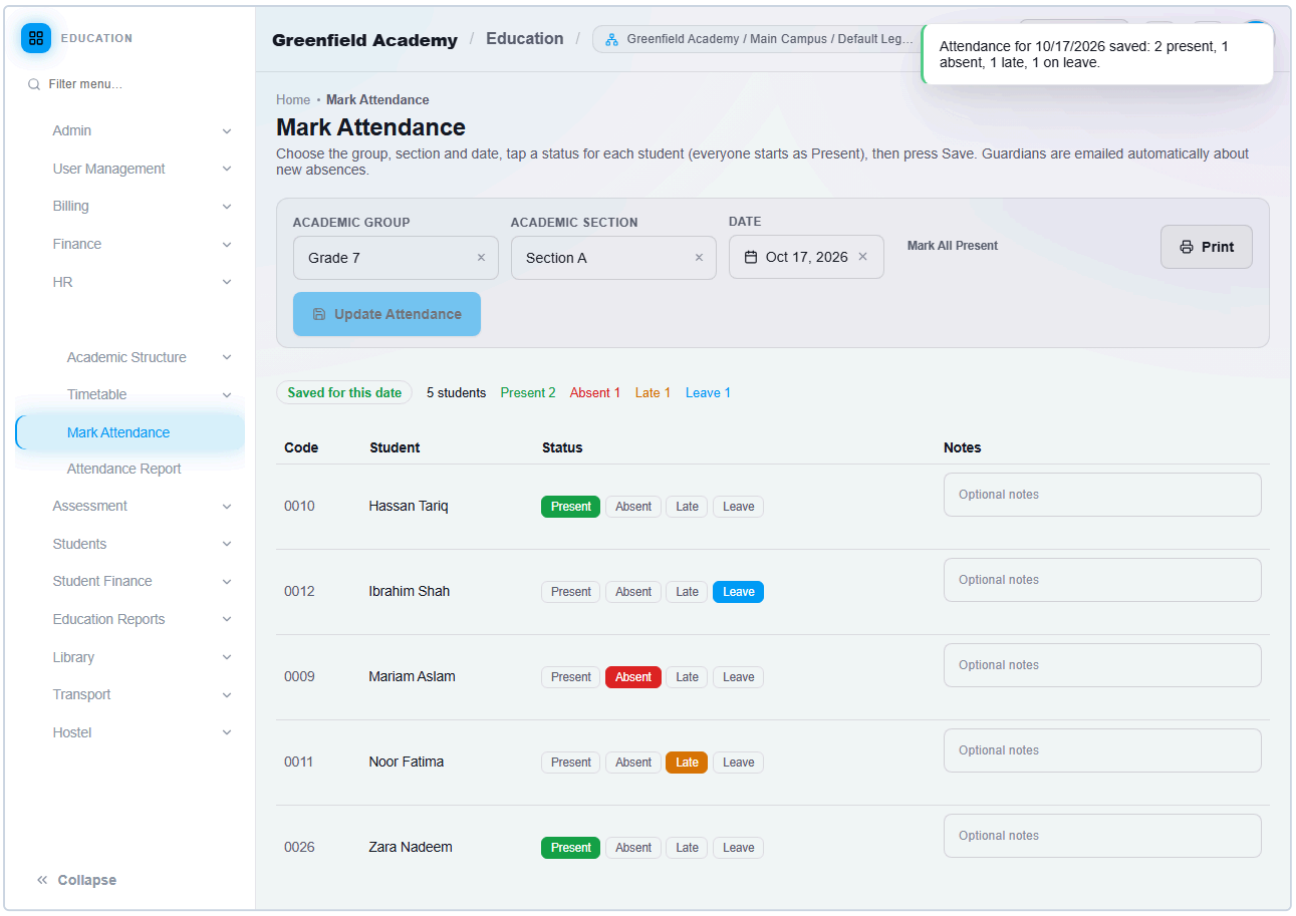
Choose the Group (1), Section (2) and Date (3). Then mark exceptions and click Save Attendance (4).



One student marked Absent, one Late and one on Leave.

The buttons above the list show counts for the day: students, present, absent, late and leave. The label beside them says **Not saved yet for this date** until you save.

After saving, a message confirms the totals, for example *Attendance for 10/17/2026 saved: 2 present, 1 absent, 1 late, 1 on leave.*

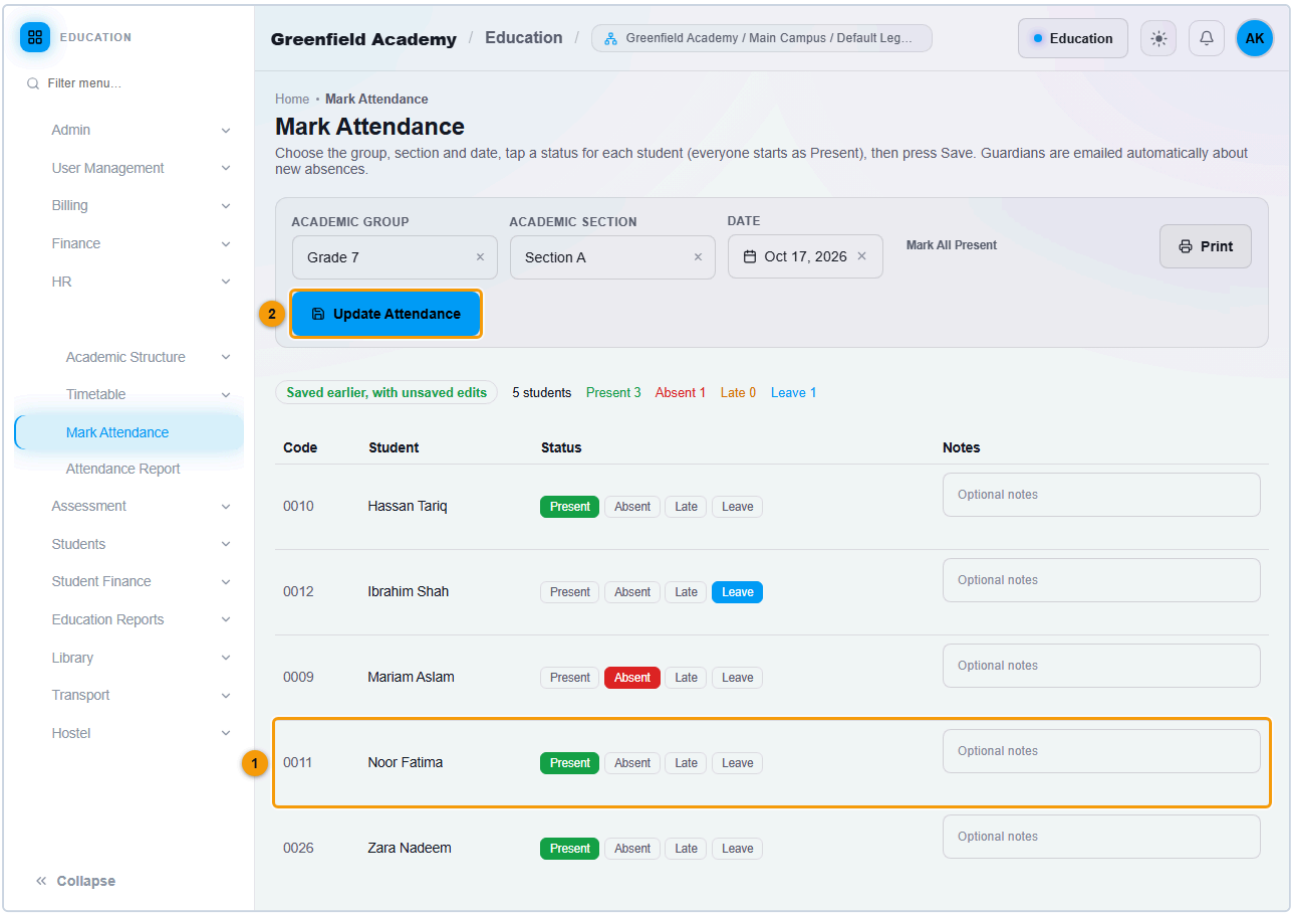


The saved message shows the totals for the day.

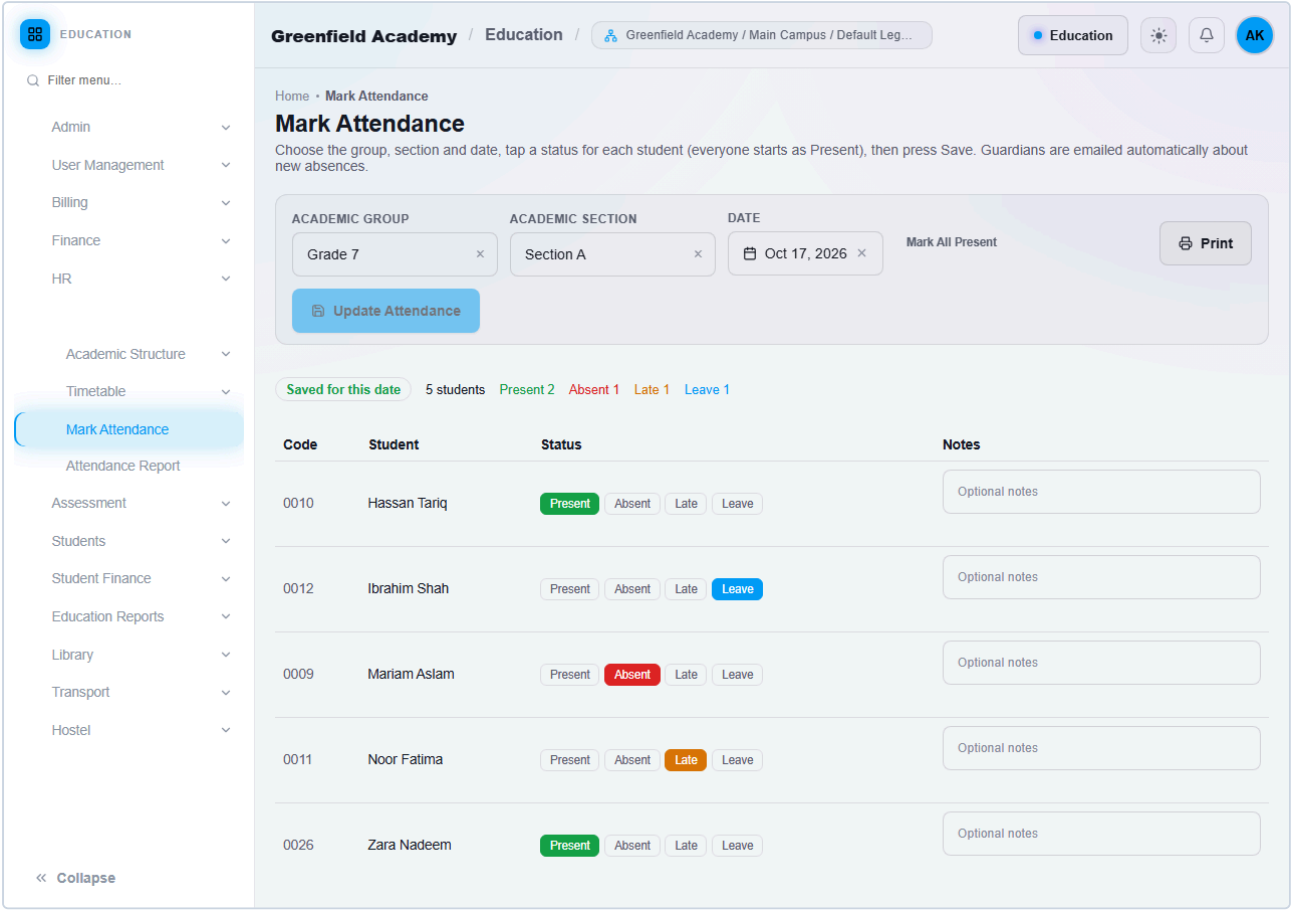
The register lists the students who are **enrolled** and **active** in that Section. **Mark All Present** resets the list, and **Print** prints it.

Open a saved day and correct it

1. Choose the same Group, Section and Date again. The label now reads **Saved for this date** and the saved statuses are shown.
2. Change any student's status.
3. Click **Update Attendance** (2).



A saved day can be corrected with Update Attendance.



After reloading the page, the saved statuses are still there.

Saving the same day again never creates a second record for a student. It updates the existing one.

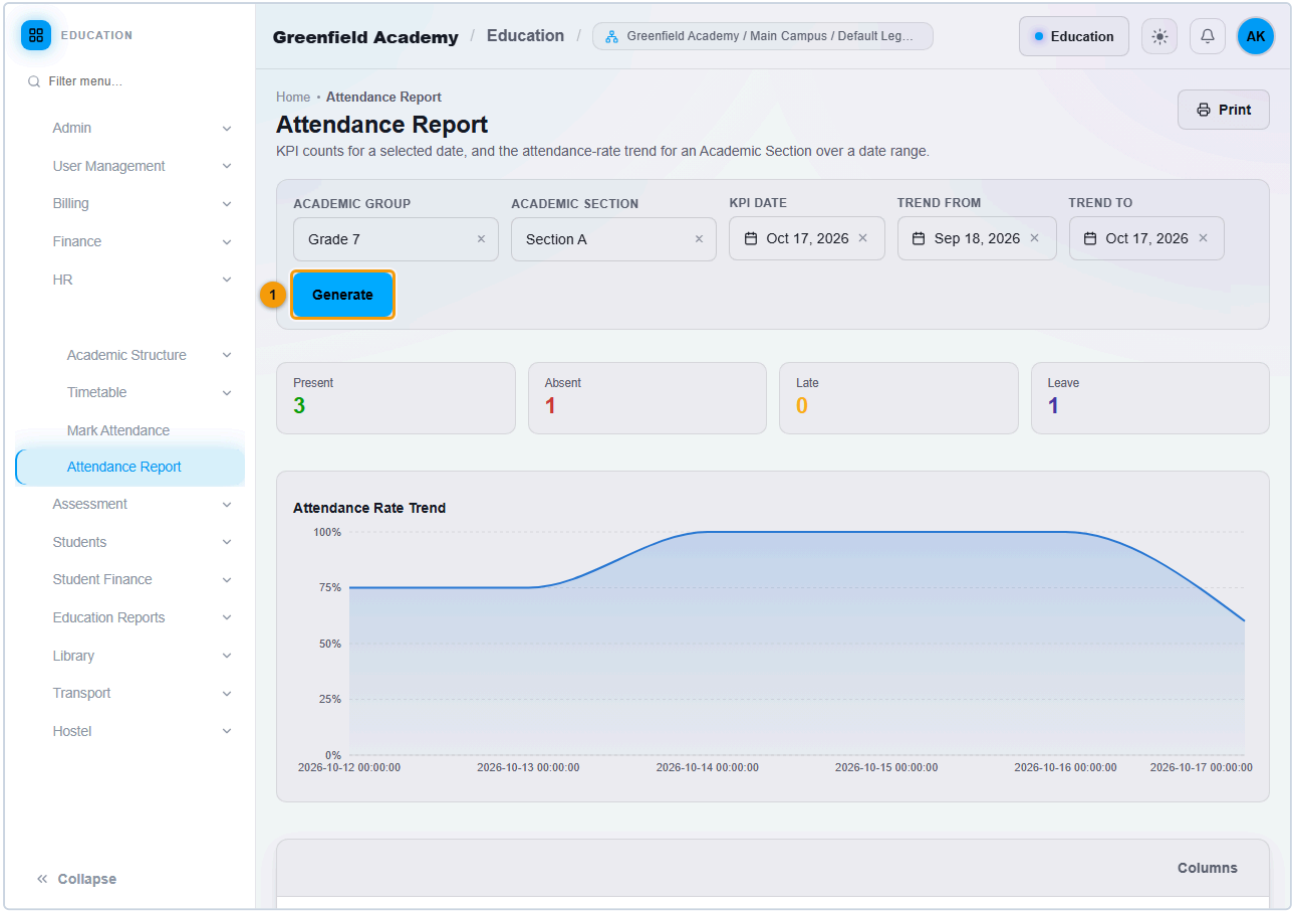
Guardian email for absences

When a student is newly marked **Absent** and a **Guardian Email** is recorded on the student, NEXTOREx emails the guardian. Record the guardian's email when you admit the student.

Read the attendance report

1. Open **Academic**, then **Attendance Report**.
2. Choose the **Academic Group** and **Academic Section**.
3. Set the **KPI Date**, and the **Trend From** and **Trend To** dates.
4. Click **Generate** (1).

You see the counts for the KPI date and the attendance-rate trend for the Section. The table lists each day with present, absent, late and leave counts and the attendance percentage.



The counts for one day, the trend, and the daily table for one Section.

The school-wide summary by Section is described in Education reports and dashboard.

Important rules

- Attendance is kept per student per day. Correct a mistake by opening the day and updating it.
- Only students who are enrolled and active appear on the register.

- Future dates cannot be selected. You can mark today and any earlier day.
- Changing the Group while you have unsaved changes asks you to confirm before the changes are discarded.

Common mistakes

- Forgetting to click **Save Attendance**. The label **Not saved yet for this date** reminds you.
- Marking the wrong Section. Check the Group and Section before saving.
- Expecting a student who is still an Inquiry or Admitted to appear. Only enrolled students are on the register.

Related guides

- Students: admission and management
- Staff and staff attendance
- Education reports and dashboard

Staff and staff attendance

Add teachers and staff, then use My Attendance, Team Attendance, My Leave, Leave Management and Attendance Settings to record who worked, who was late and who was on leave.

Plan: Education Standard and above

What this does

Staff holds the employment record of every teacher and staff member. **Staff attendance** records who came to work, who was late, who was on leave and which days were holidays.

Who can use it

Staff with the Staff Profile and Staff Attendance permissions. A staff member whose login is linked to an active staff profile can check in for themselves and ask for leave.

Which package includes it

Education Standard and Education Campus. Education Essentials does not include Staff or Staff Attendance.

How staff use your User seats

A staff member is also a user who signs in. Adding a staff member uses **one ordinary User seat** of your package, the same seats you see as **Users** under **My Plan**. There is no separate limit for staff. Student portal logins do not use seats. If your package has no seat left, the new staff member is refused with a message that the user limit has been reached.

Where to find it

Open **HR**. It holds **Staff**, **My Payslips**, **Attendance** and **Payroll**.

- **Staff** is the list of staff profiles.
- **Attendance** holds five screens: **My Attendance**, **My Leave**, **Team Attendance**, **Leave Management** and **Attendance Settings**. You see only the screens your role allows.
- **Payroll** is a separate workflow. See Payroll.

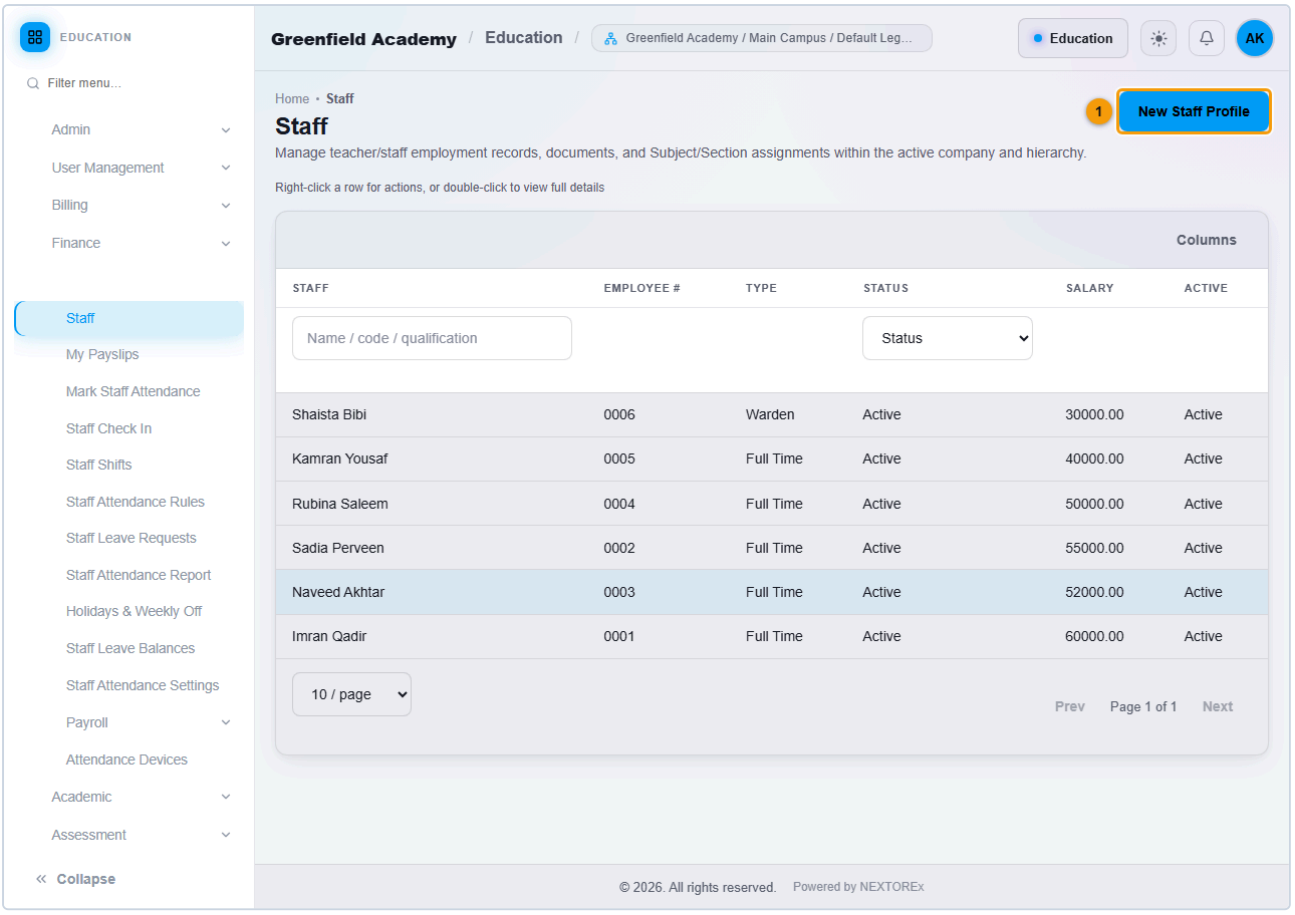
Attendance and Payroll are two different things. Attendance records who worked and when. Payroll turns salaries into payslips and pays them. Recording attendance does not pay anyone, and generating payroll does not change attendance.

Who sees which staff

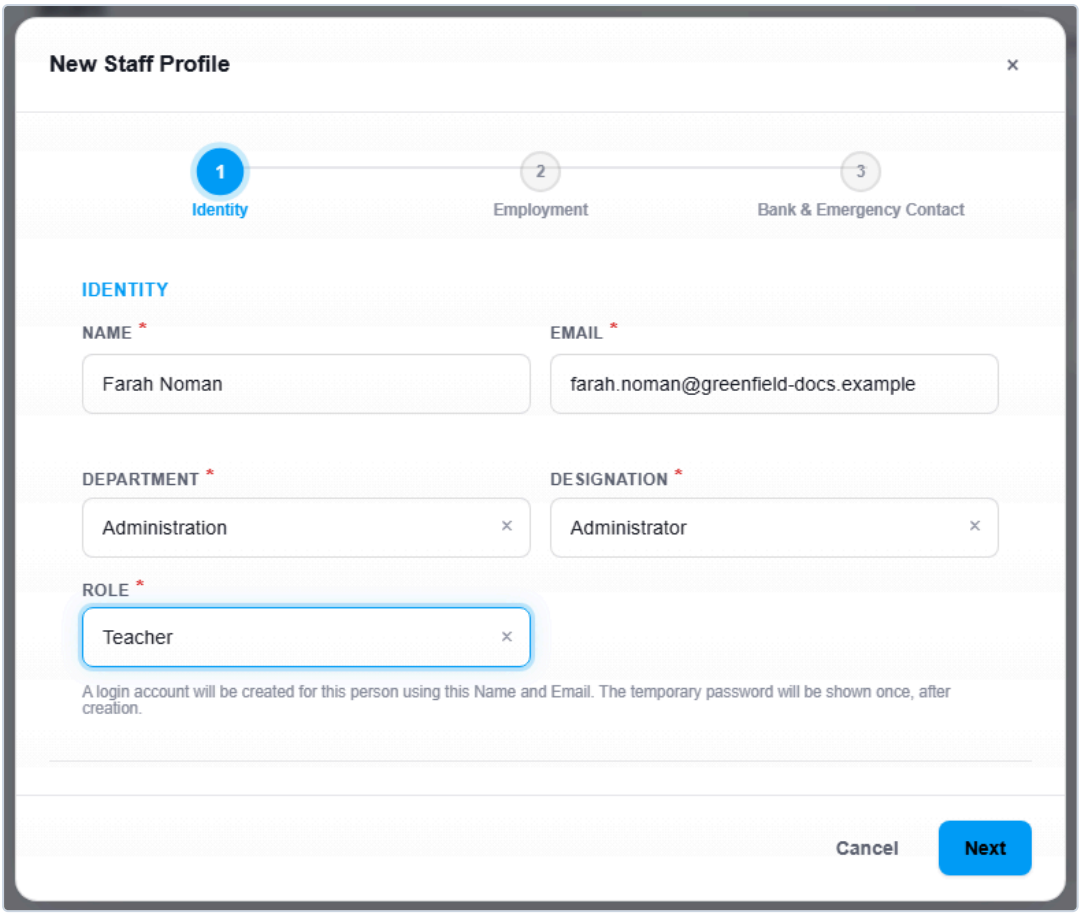
You work with your own place in the hierarchy (Business Group, Legal Entity, Operating Unit, Sub Unit) **and the places beneath it**. A manager of an Operating Unit sees the staff of that Operating Unit and of the Sub Units under it. A manager of one Sub Unit sees only that Sub Unit. Nobody can see a parent, a sibling or an unrelated branch. This applies to Staff, Team Attendance, Leave Management and Payroll, and to the Role and Staff lists you can choose from. See Roles.

Steps: add a staff member

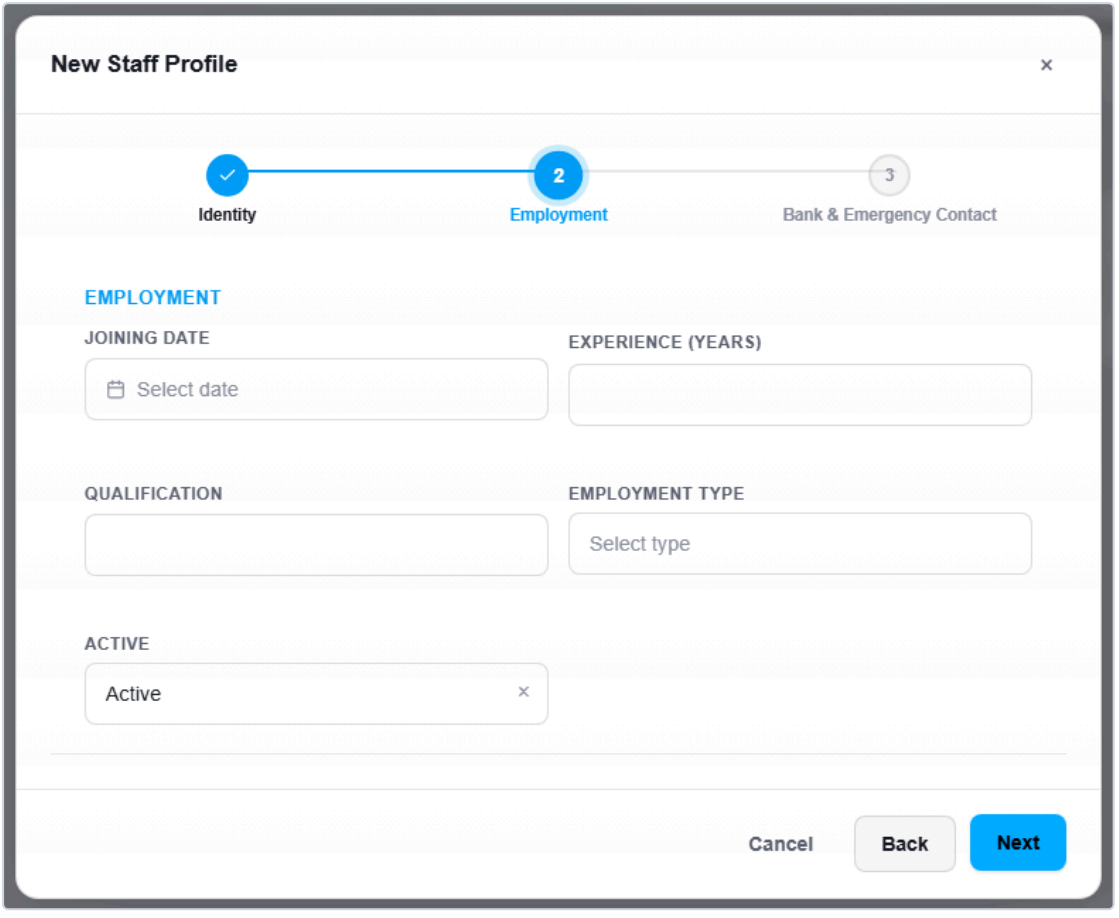
1. Open **HR**, then **Staff**, and click **New Staff Profile** (1).
2. On **Identity**, enter the **Name** and **Email**, and choose the **Department**, then the **Designation**, and the **Role**. The role decides what the person can do. You can choose only roles from your own place in the hierarchy and the places beneath it. See Roles and access.
3. Click **Next**. On **Employment**, enter the joining date, qualification, employment type and salary.
4. Click **Next**. On **Bank & Emergency Contact**, add the details you want to keep, then save.



Staff with their employee number, type, status and salary. Click New Staff Profile (1) to add one.



Identity: name, email, department, designation and role.

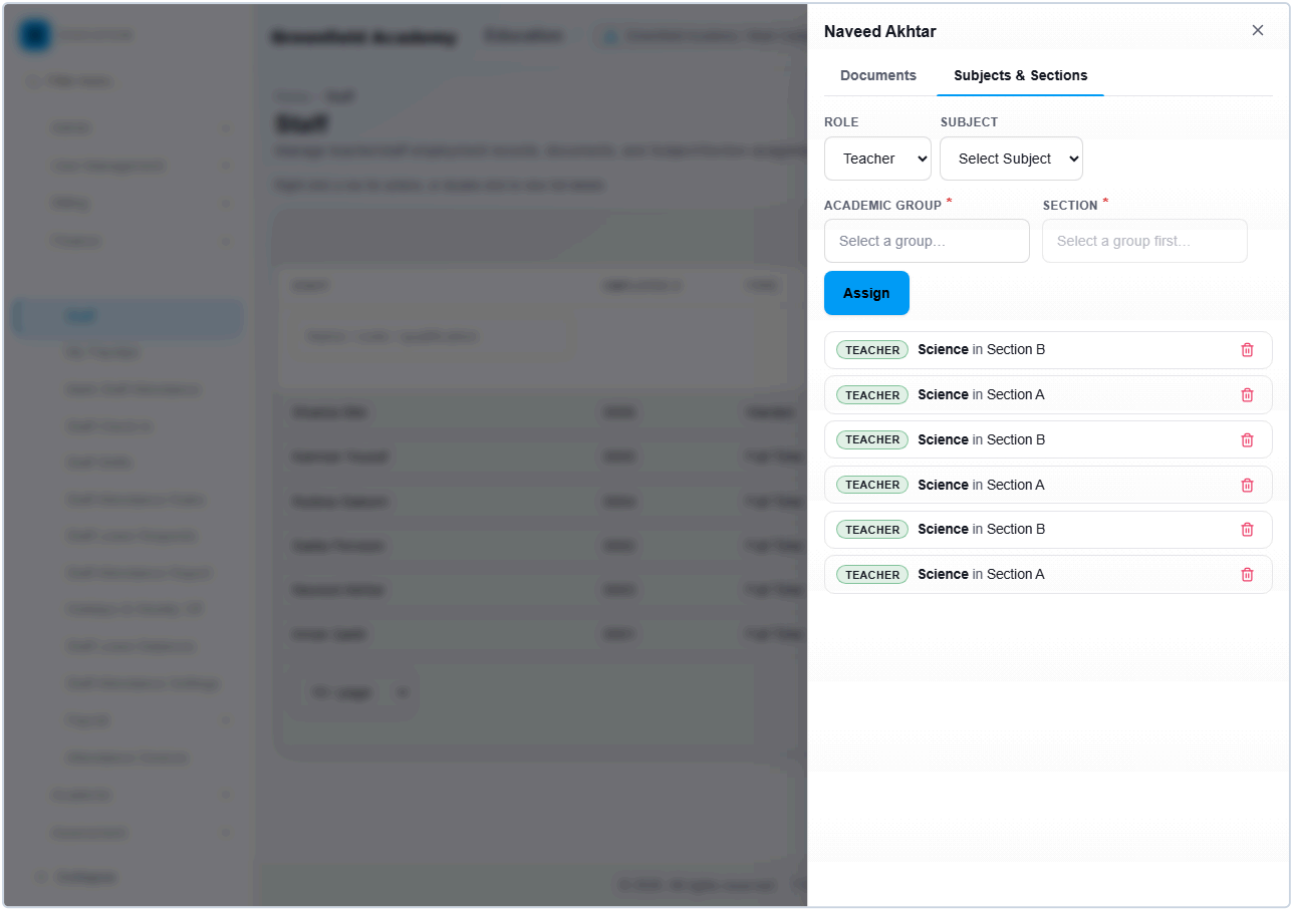


Employment: joining date, qualification, type and salary.

A login account is created for the person from the name and email. A temporary password is shown **once** after saving. Copy it and share it safely.

Steps: assign a teacher to Subjects and Sections

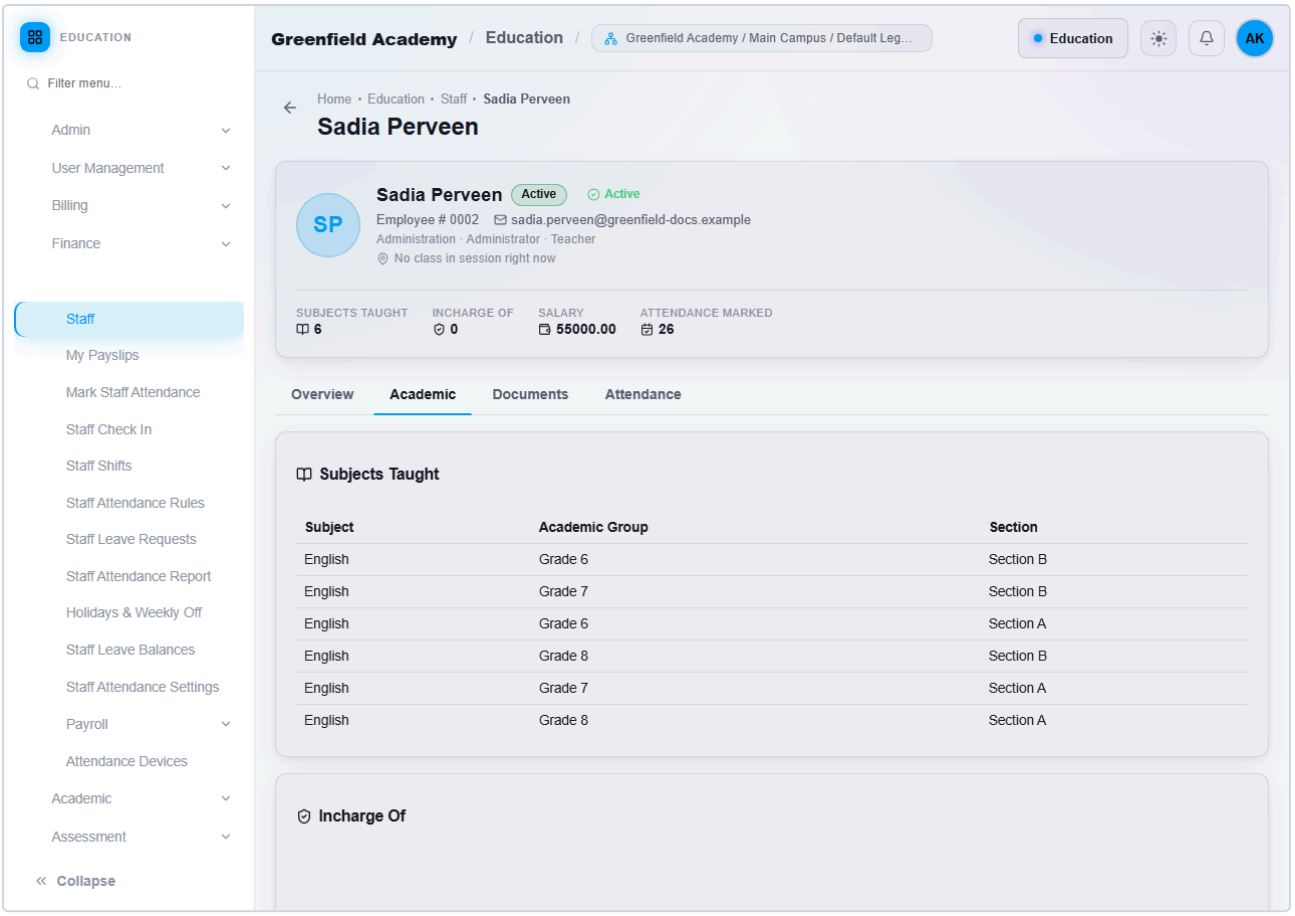
1. On the **Staff** list, right-click the teacher and choose **Documents & Assignments**.
2. Open **Subjects & Sections**.
3. Choose the **Subject**, the **Academic Group** and the **Section**, and click **Assign**. A teacher can also be made **Incharge** of a Section.



A teacher is linked to each Subject and Section they teach.

These links decide which Sections a teacher can see for attendance, marks, the timetable, study material and assignments.

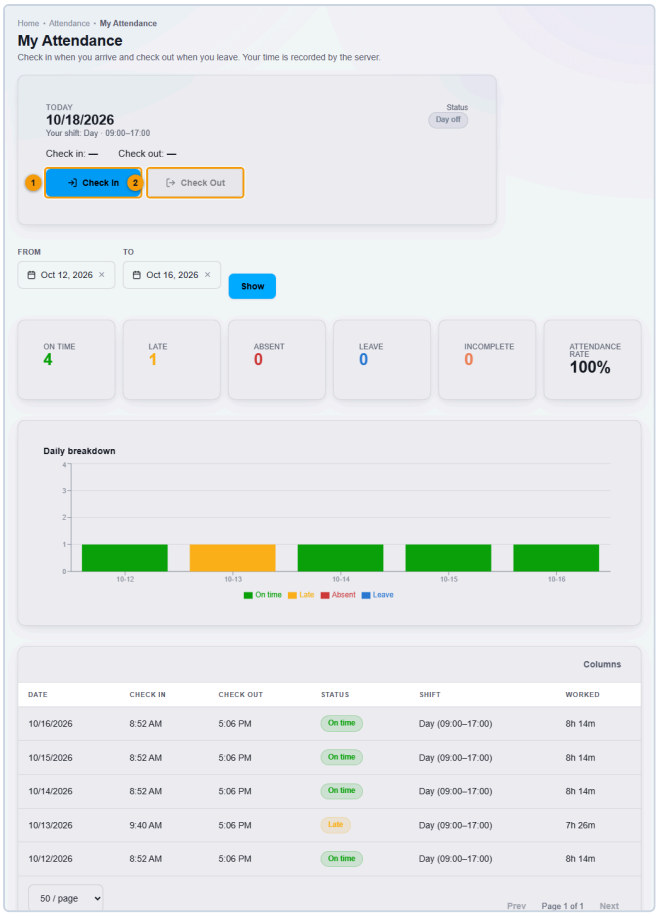
The staff profile (right-click, **View Details**) shows the identity, employment and bank details, the Subjects taught, the documents and a month-by-month attendance summary.



The Academic tab lists the Subjects a teacher teaches and the Sections they are Incharge of.

My Attendance

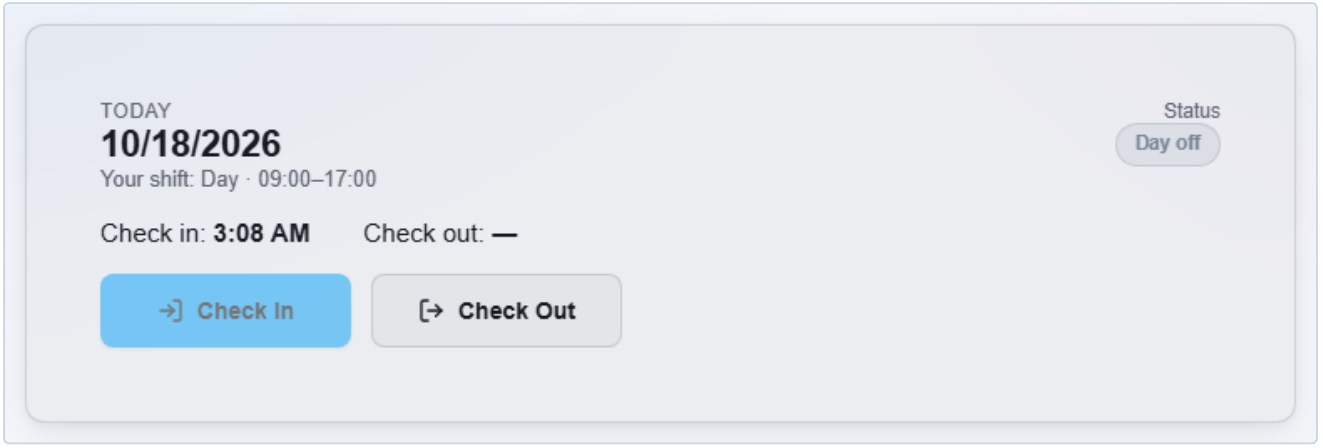
My Attendance is the screen every staff member uses for their own day. Open **HR**, then **Attendance**, then **My Attendance**.



Today's card with Check In (1) and Check Out (2), then your summary, chart and own history.

Check In and Check Out

1. The **Today** card shows today's date, your shift, your status, and your **Check in** and **Check out** times.
2. Click **Check In** (1) when you arrive. The system records the current time of your institution. **You do not choose the time yourself.**
3. Click **Check Out** (2) when you leave. **Check Out** stays greyed out until you have checked in.
4. After you check in, **Check In** is greyed out. There is one check-in a day.



The recorded time appears next to Check in. Check In is now unavailable.

Under the card, choose **From** and **To**, then click **Show** to see your own history. You see:

- **Summary tiles**: **On time**, **Late**, **Absent**, **Leave**, **Incomplete** (a finished day with a check-in but no check-out) and **Attendance rate**.
- A **Daily breakdown** chart.
- A table with the **Date**, **Check in**, **Check out**, **Status**, **Shift** and **Worked** time.

If your login is not linked to an active staff profile, the screen says so and there is nothing to check in to. Ask your administrator.

What the statuses mean

Status	What it means
On time	You checked in by your shift start plus the grace time.
Late	You checked in after the grace time. On the **Today** card the badge also shows how many minutes late.
Absent	The working period is over and there is no attendance, no approved leave and no day off.
Leave	You have **approved** leave for that day.
Day off	A weekly off day or a holiday. It is never counted as an absence.
Half day / **Short time**	Shown when the time worked is below the limits set in Attendance Settings.
No check-out	You checked in but never checked out.

How Late is decided

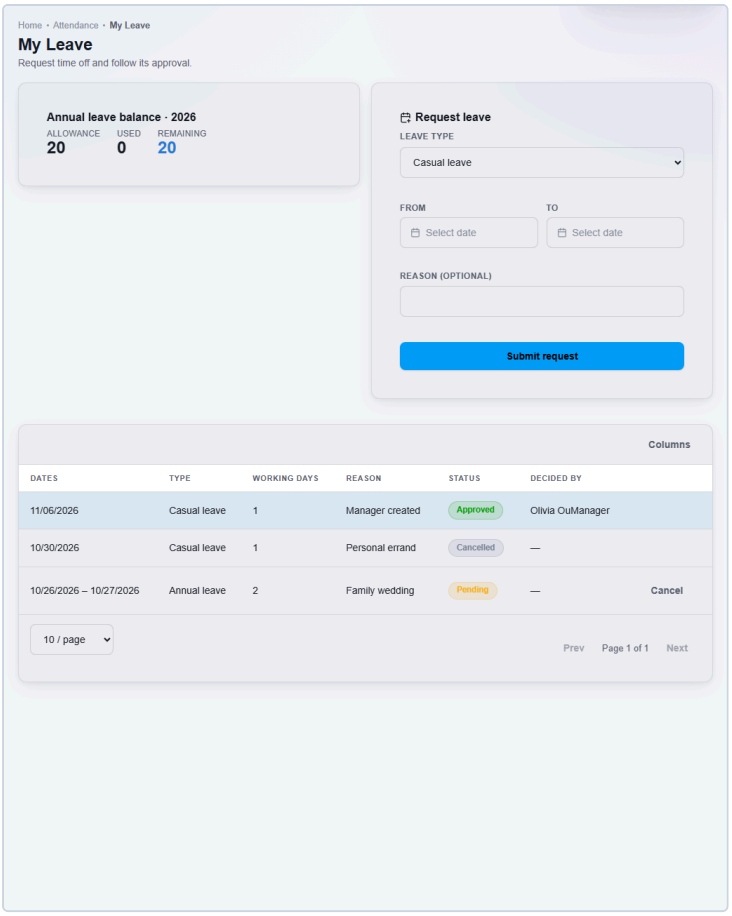
The system compares your **Check In** with your **Shift** start time and the **Grace time** in your attendance rule. For example, with a 09:00 shift and a 15-minute grace time, a check-in at 09:15 is **On time** and 09:16 is **Late**. This is only an example. Your own result follows the shift and grace time your administrator set in **Attendance Settings**.

When someone becomes Absent

Absent is never given to a future day, or to today before the working period has finished. A staff member is absent only after the day is over, when there is no check-in, no approved leave and the day is not a weekly off day or holiday. The shift and rule decide the details, and **Absent** can appear a little after the day closes.

My Leave

Open **HR**, then **Attendance**, then **My Leave**.



Your annual leave balance, the request form and your requests.

1. Look at **Annual leave balance** for the year: **Allowance**, **Used** and **Remaining**. If no allowance was set for you, the card says so. You can still ask for other kinds of leave.
2. Under **Request leave**, choose the **Leave type**, then **From** and **To**, and add a **Reason** if you want to.
3. Click **Submit request**.
4. Your request appears in the table as **Pending**. A manager then makes it **Approved** or **Rejected**.
5. To withdraw a request that is still **Pending**, click **Cancel** on its row and confirm. It shows as **Cancelled**.

> **Important:** Submitting a request does **not** make your attendance **Leave**. Only an **Approved** request does. Until then the day is judged like any other day.

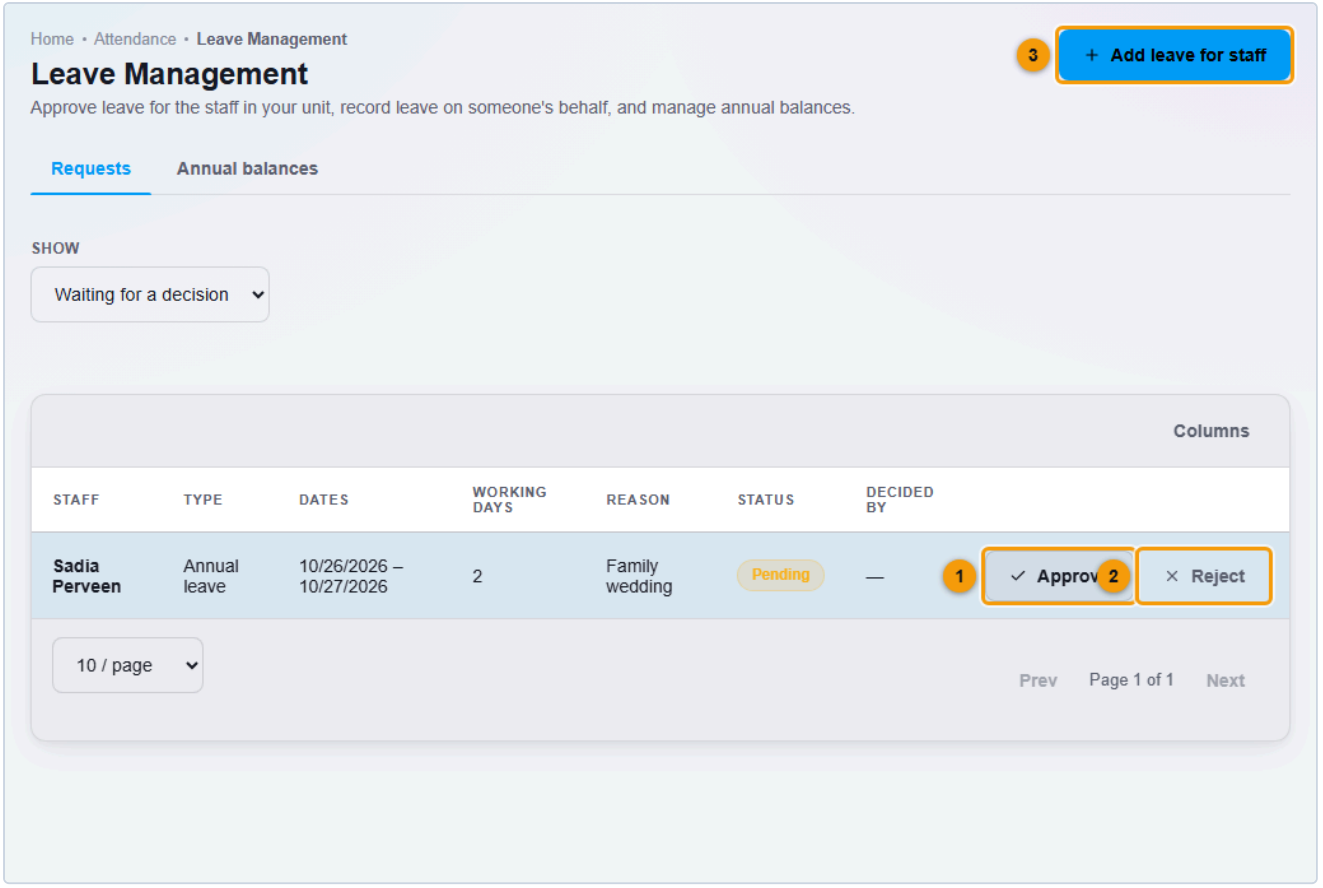
The table shows **Dates**, **Type**, **Working days**, **Reason**, **Status** and **Decided by**. Leave that a manager recorded for you shows **Recorded by manager**.

Leave types and the annual balance

The leave types are **Annual leave**, **Sick leave**, **Casual leave**, **Unpaid leave** and **Other**. Only **Annual leave** is tracked against a balance. It is checked when you ask and again when it is approved, and the days are counted when it is approved. The other types do not use the annual balance. A weekly off day or holiday inside a leave range still shows as **Day off**, not as an absence.

Leave Management

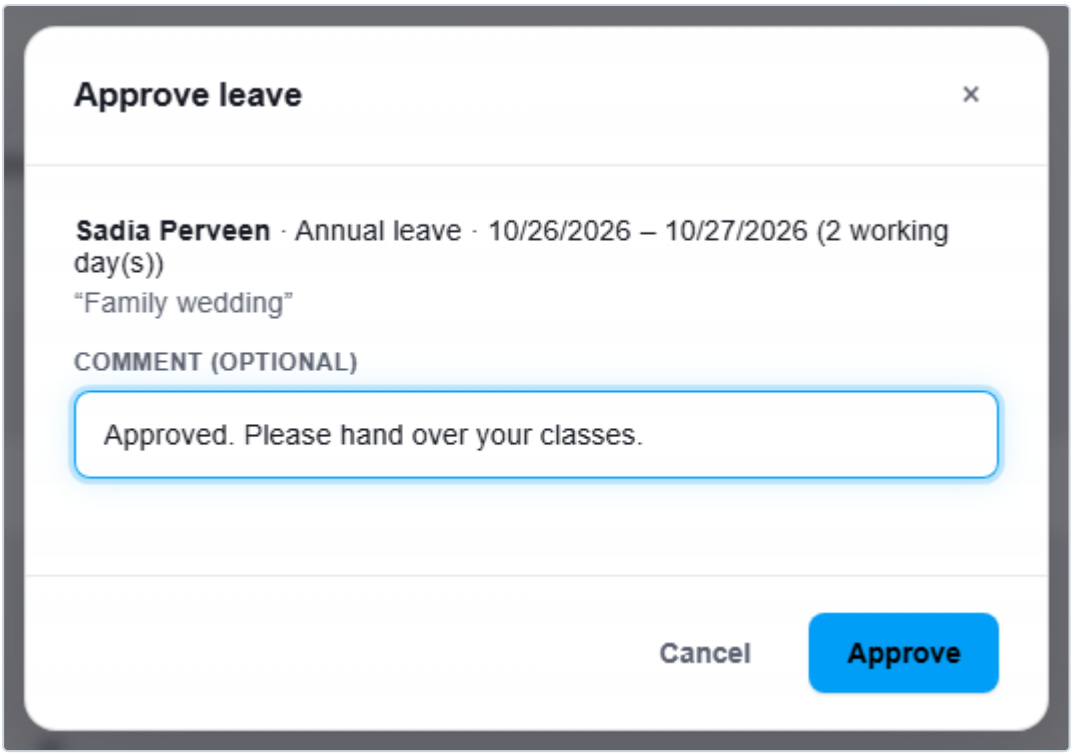
Open **HR**, then **Attendance**, then **Leave Management**. It has two tabs: **Requests** and **Annual balances**. You see only the staff within your own place in the hierarchy and the places beneath it.



Requests waiting for a decision. Approve (1), Reject (2) and Add leave for staff (3).

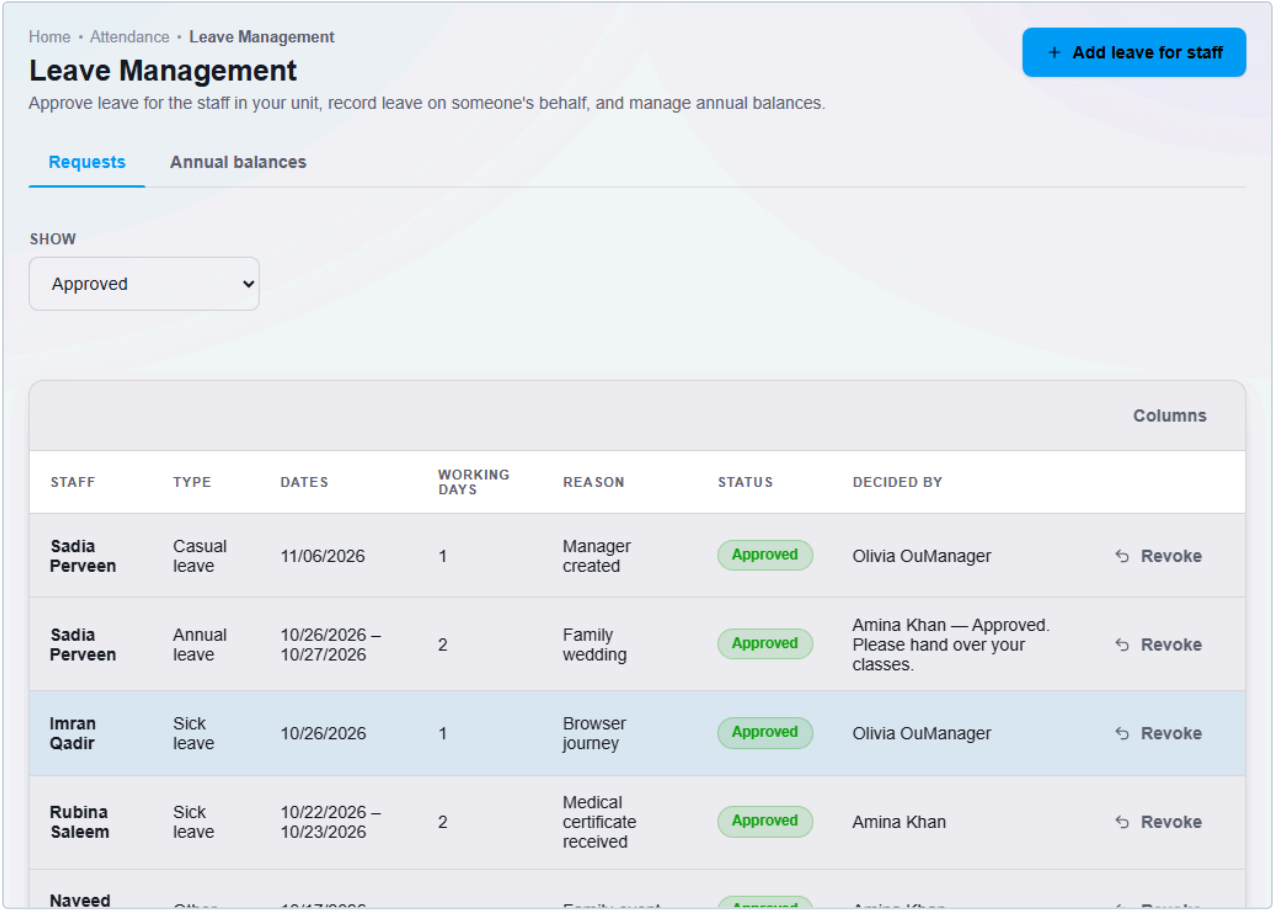
Approve or reject a request

1. On **Requests**, the list starts on **Waiting for a decision**. Use **Show** to see **Approved**, **Rejected**, **Cancelled** or **Everything**.
2. Click **Approve** (1) or **Reject** (2) on the row.
3. Read the request, add a **Comment (optional)**, and confirm.



Check the staff member, type, dates and working days, then confirm.

An approved request becomes **Leave** in the staff member's attendance for those days. You can **Revoke** an approved leave later. Any annual balance it used is given back and the days are worked out again.

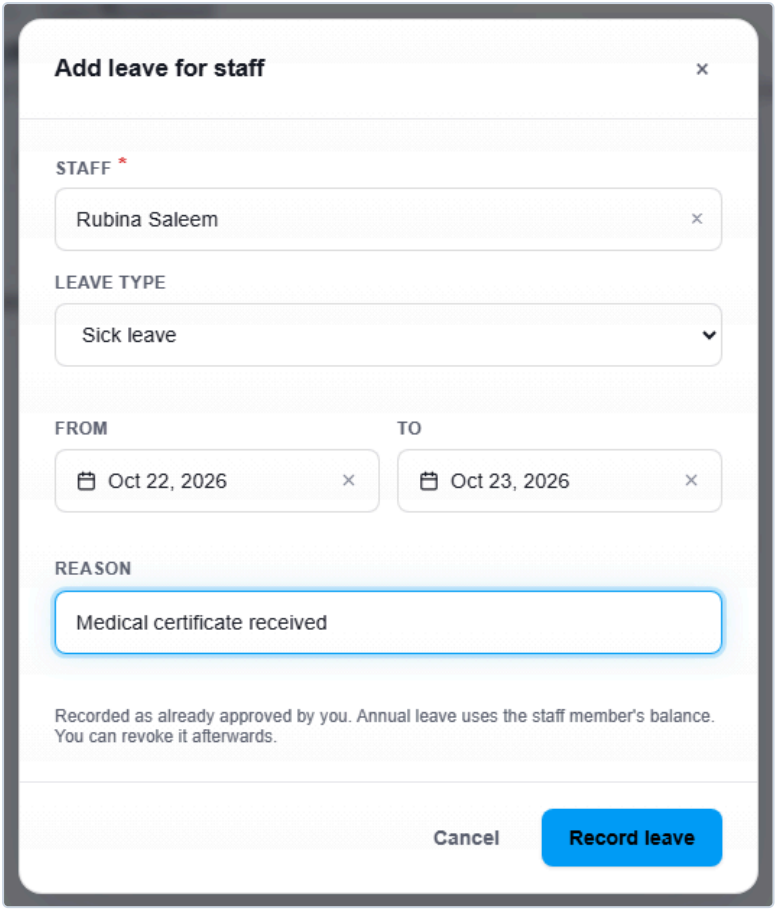


Approved leave. Revoke undoes it.

Add leave for a staff member

Use this when someone told you in person, or sent a medical certificate.

1. Click **Add leave for staff** (3).
2. Choose the **Staff**, the **Leave type**, **From**, **To** and a **Reason**.
3. Click **Record leave**.

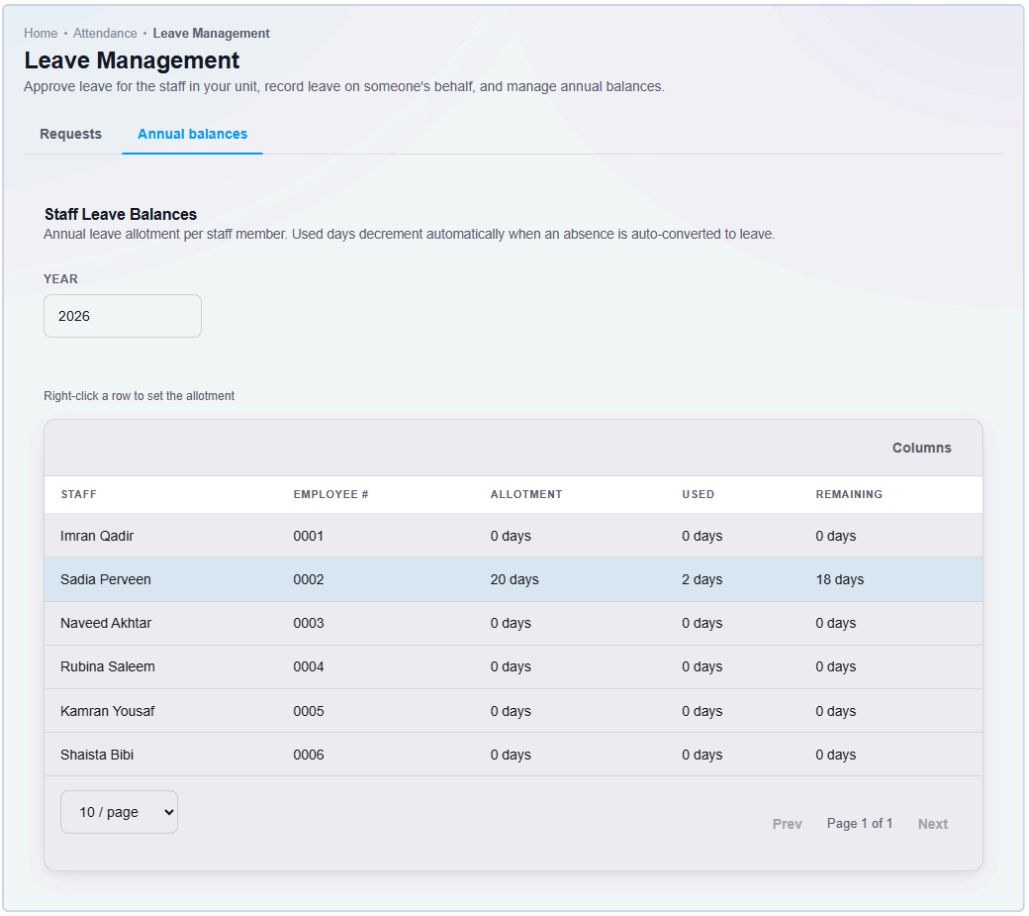


Leave you record is saved as already approved.

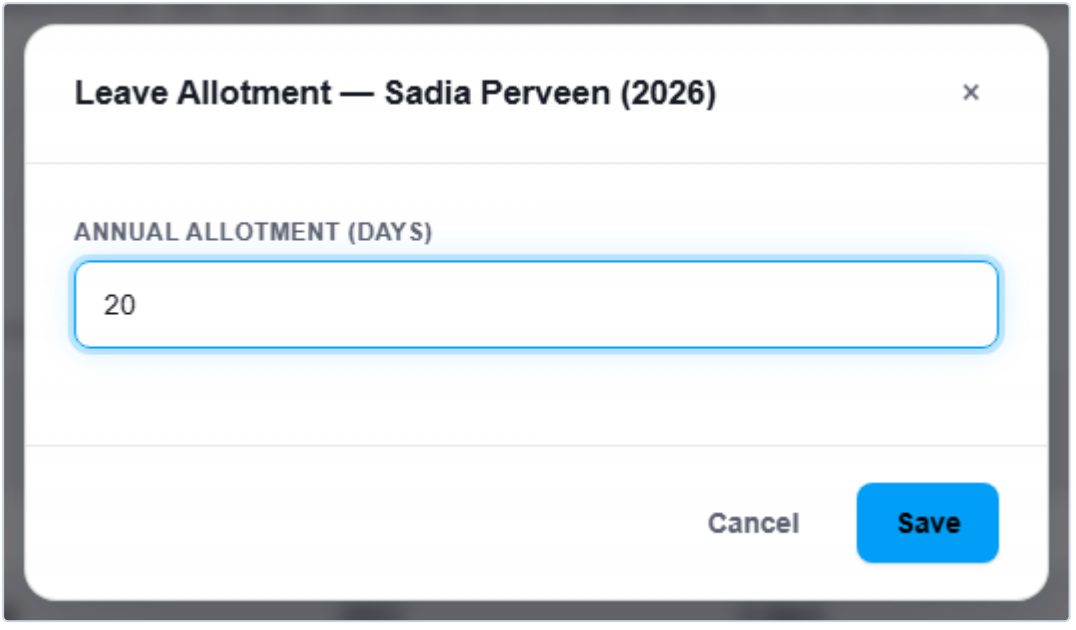
Leave that a manager adds is **Approved immediately**. Annual leave uses the staff member's balance.

Annual balances

Open the **Annual balances** tab. It shows the **Allotment**, **Used** and **Remaining** days of each staff member for a year. To set the allowance, right-click a staff member, choose **Set Allotment**, enter the days and click **Save**.



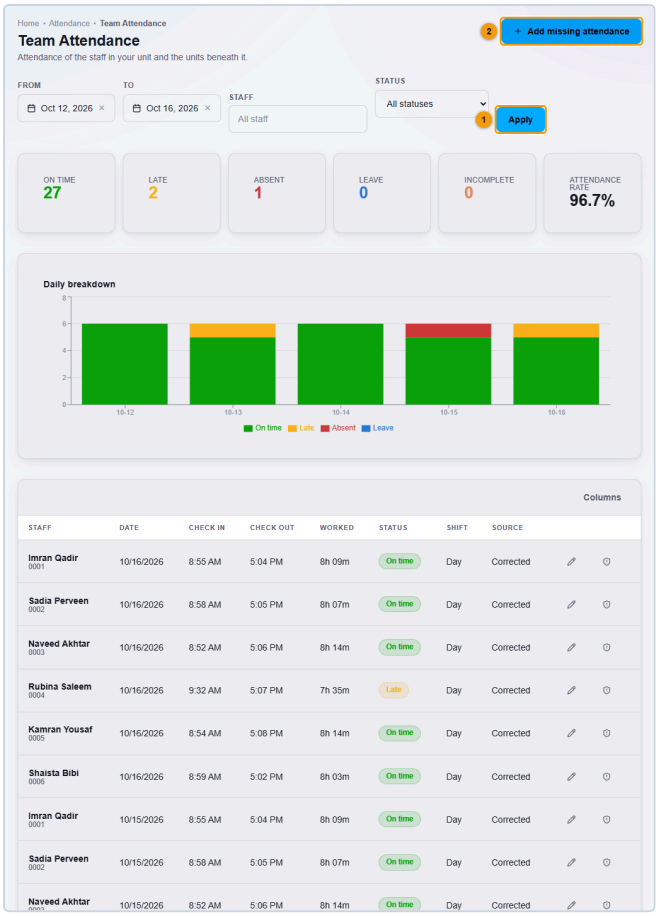
Allowance, days used and days remaining.



Enter the annual allotment in days.

Team Attendance

Open **HR**, then **Attendance**, then **Team Attendance**. It shows the attendance of the staff in your unit and the units beneath it. It replaces the older **Mark Staff Attendance** and **Staff Attendance Report** screens.



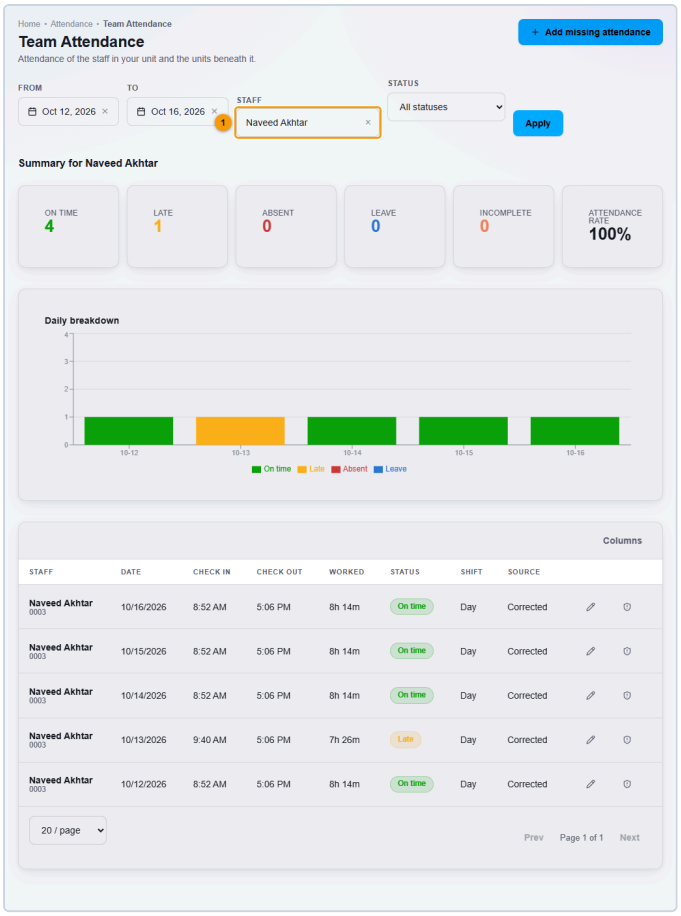
Choose the dates and filters, then click Apply (1). Add missing attendance (2) is for forgotten days.

The table has these columns: **Staff**, **Date**, **Check in**, **Check out**, **Worked**, **Status**, **Shift** and **Source**. **Unit** appears when you can see more than one unit. **Source** shows **Self** for a staff member's own check-in, **Device** for an attendance device, and **Corrected** when a manager changed the times.

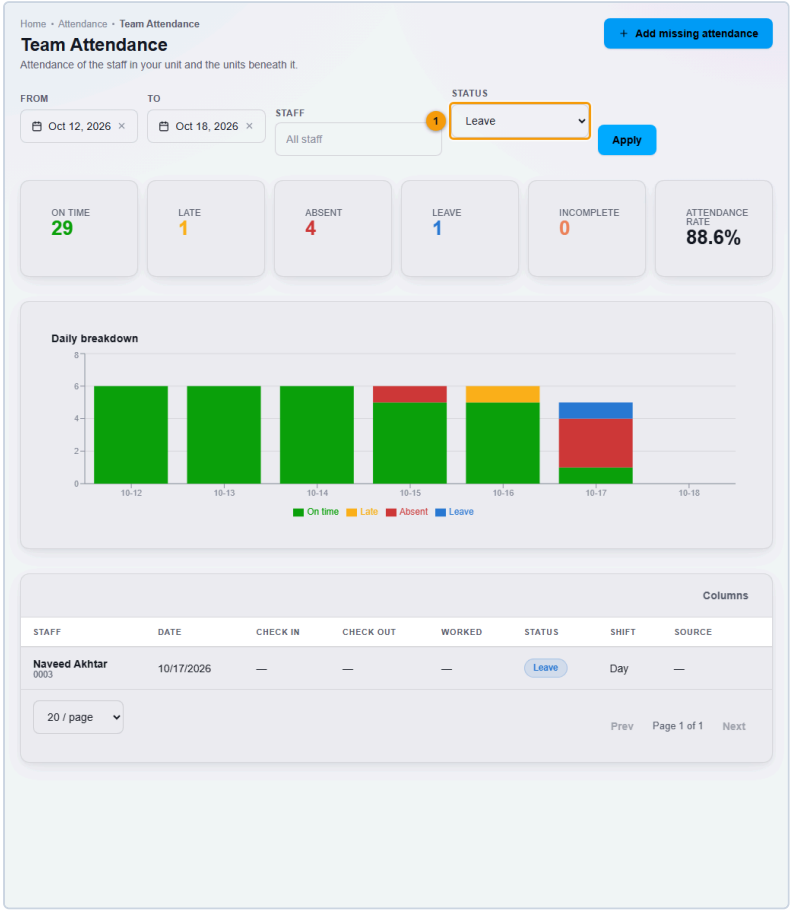
Choose these filters, then click **Apply**:

- **From** and **To** for the dates.
- **Staff** for one person.
- **Unit** to look at one unit (only when you can see more than one).
- **Status**: **On time**, **Late**, **Absent**, **Leave**, **Day off / Holiday**, **Half day / Short time** or **No check-out**.

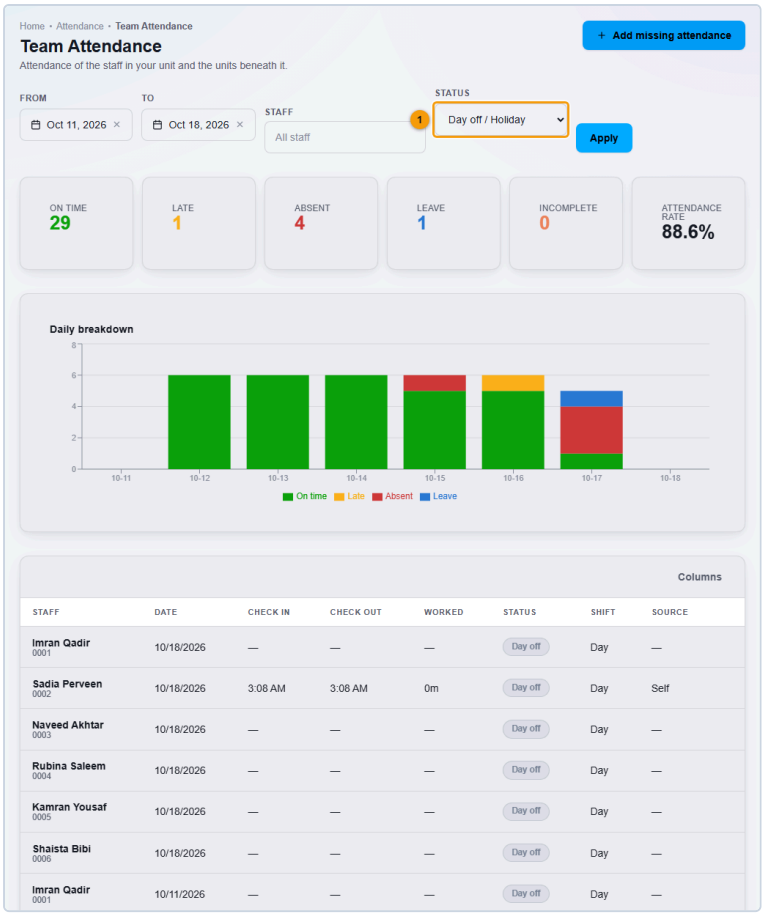
The summary tiles and the daily chart cover the dates and the staff you chose. The **Status** filter narrows the table only.



When you choose one Staff, the tiles and chart show only that person.



Filtered to Leave: approved leave shows as Leave.



Weekly off days and holidays show as Day off, not Absent.

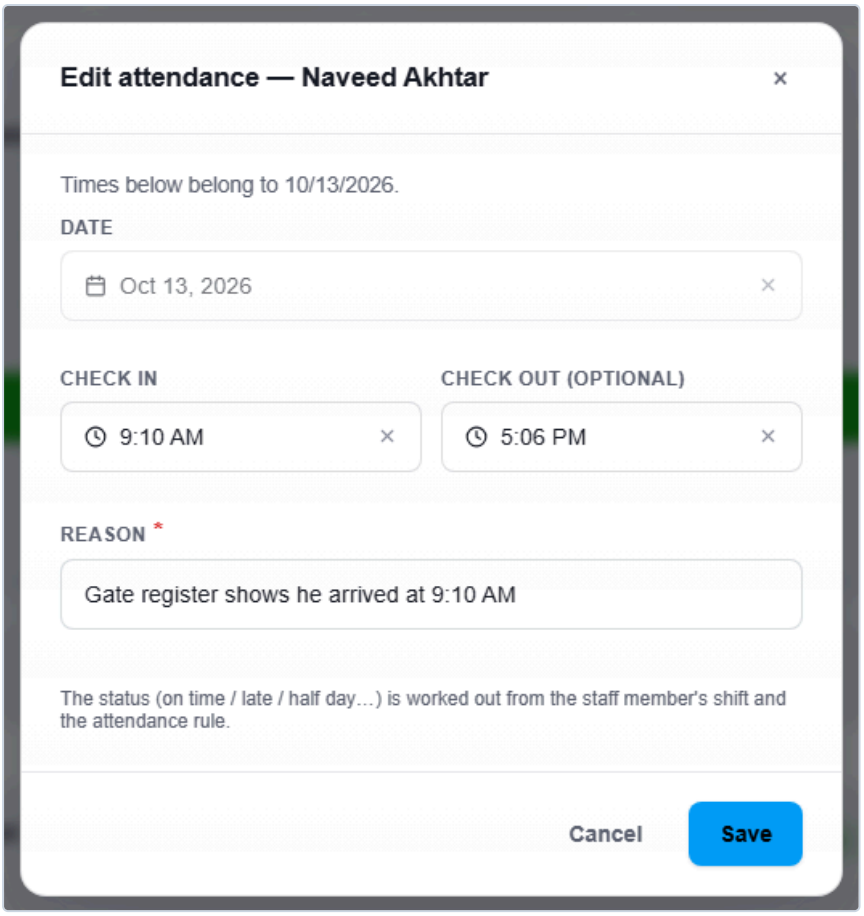
Attendance summaries

The tiles show **On time**, **Late**, **Absent**, **Leave**, **Incomplete** and **Attendance rate**. The rate is the days attended divided by the days expected. Leave and days off are not counted against anyone. These are the only summaries on the screen.

Correct an attendance record

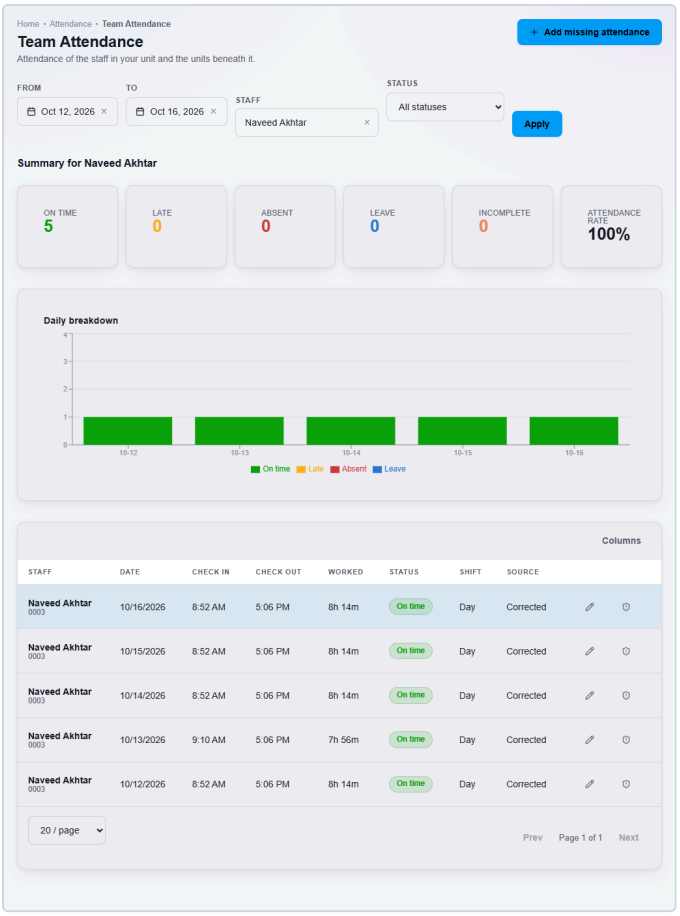
Use this when the recorded times are wrong.

1. Find the staff member and the day, then click the pencil icon on the row.
2. Change **Check in** or **Check out**. The date stays the same: the times belong to that attendance day.
3. Enter the **Reason**. It is required.
4. Click **Save**.



Change the times and give a reason.

The status is worked out again from the shift and the attendance rule. In the example the check-in moved from 9:40 AM to 9:10 AM, so **Late** became **On time**. The row then shows **Corrected** in **Source**.



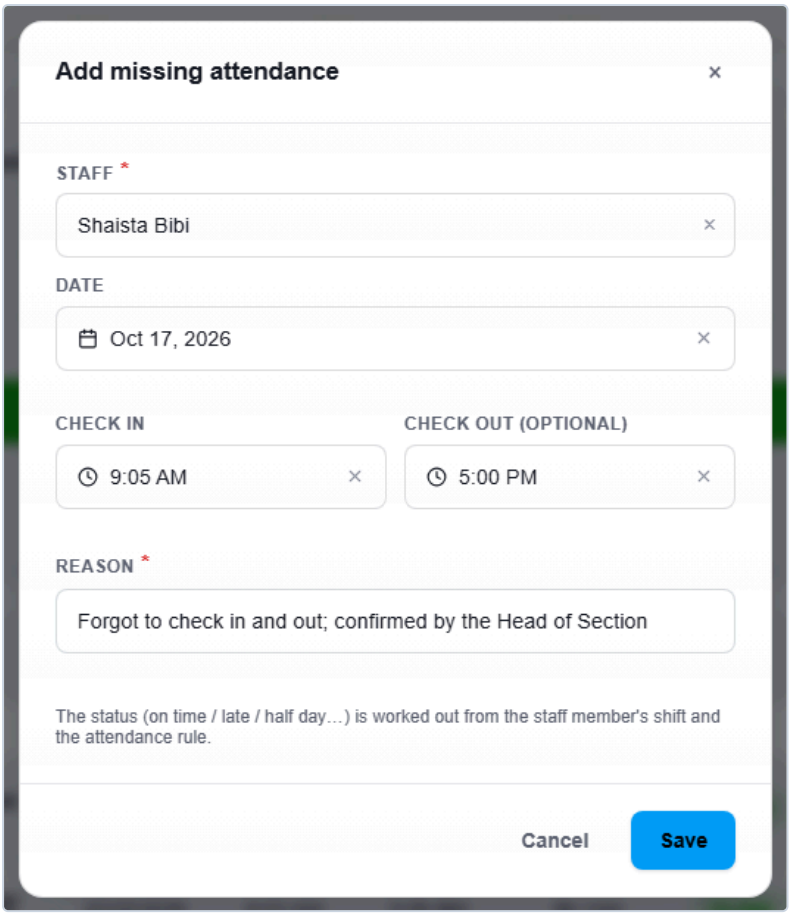
The day is recalculated and shown as Corrected.

Rows for approved leave and for days off cannot be edited here.

Add missing attendance

Use this when a staff member forgot to check in **and** out, so no attendance exists for that day.

1. Click **Add missing attendance** (2).
2. Choose the **Staff** and the **Date**.
3. Enter **Check in**, and **Check out** if you know it.
4. Enter the **Reason**, then click **Save**.



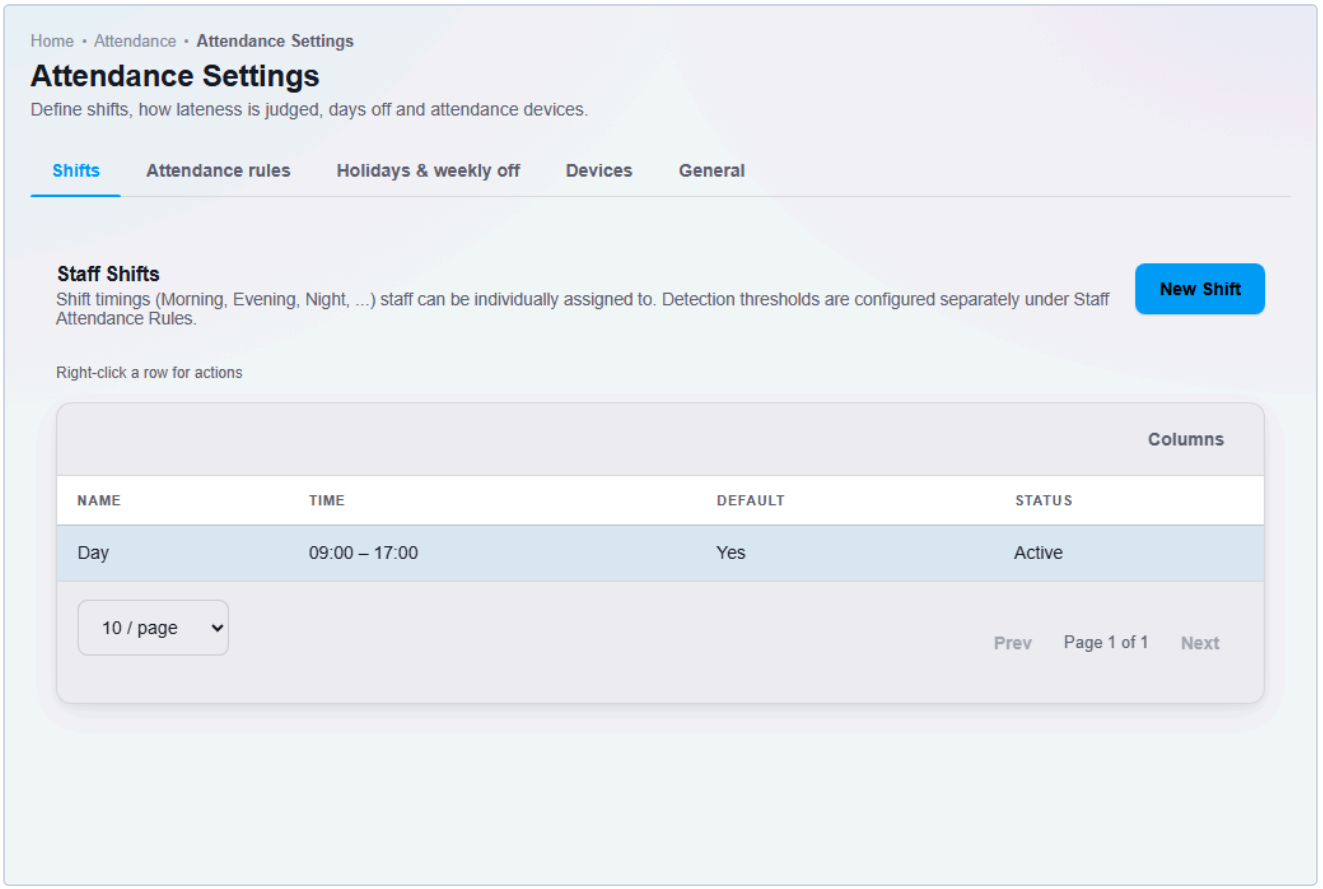
Staff, date, times and a reason.

A staff member has one attendance record per day. Adding attendance for a day that already has one updates it. It does not make a second record.

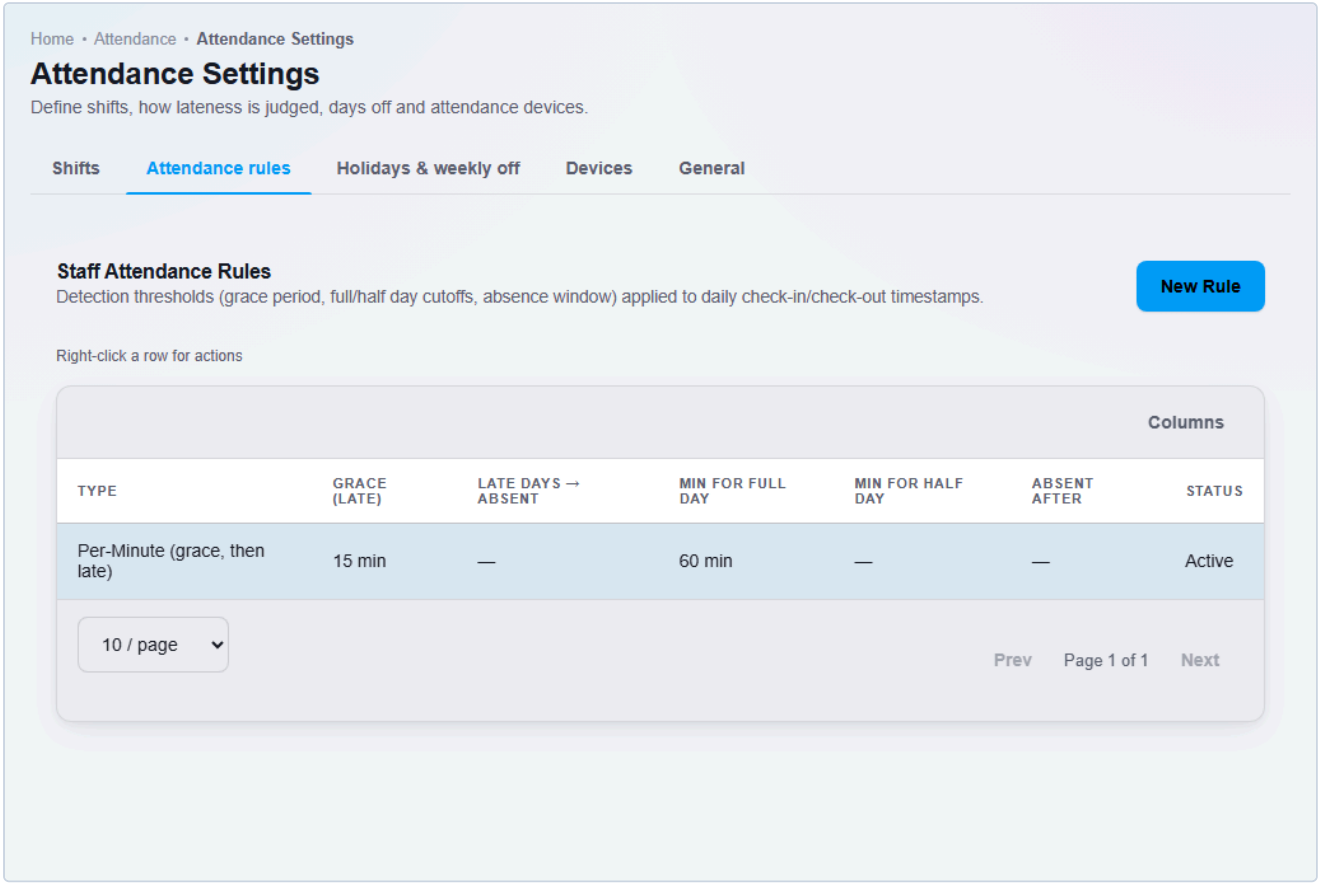
Attendance Settings

Open **HR**, then **Attendance**, then **Attendance Settings**. It is for administrators. It has five tabs.

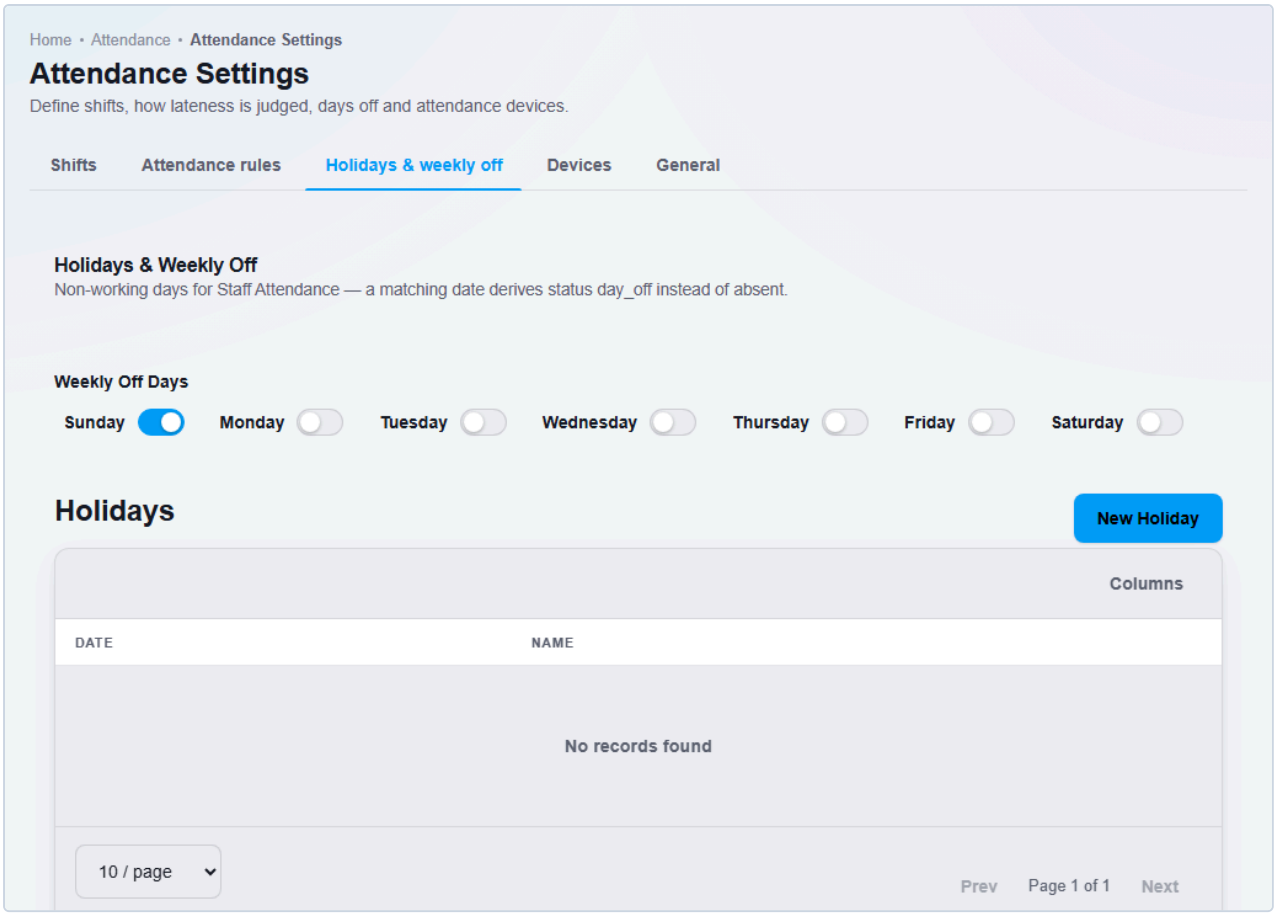
Tab	What it is for
Shifts	The working hours, for example **Day**, 09:00 to 17:00. One shift can be the default.
Attendance rules	How strict lateness is: the **Grace (late)** time and the minutes needed for a full or half day.
Holidays & weekly off	The **Weekly Off Days** and the **Holidays**. These dates count as a day off, not an absence.
Devices	Attendance devices that an administrator can register.
General	Company-wide behaviour, such as **Auto-convert Absent to Leave**.



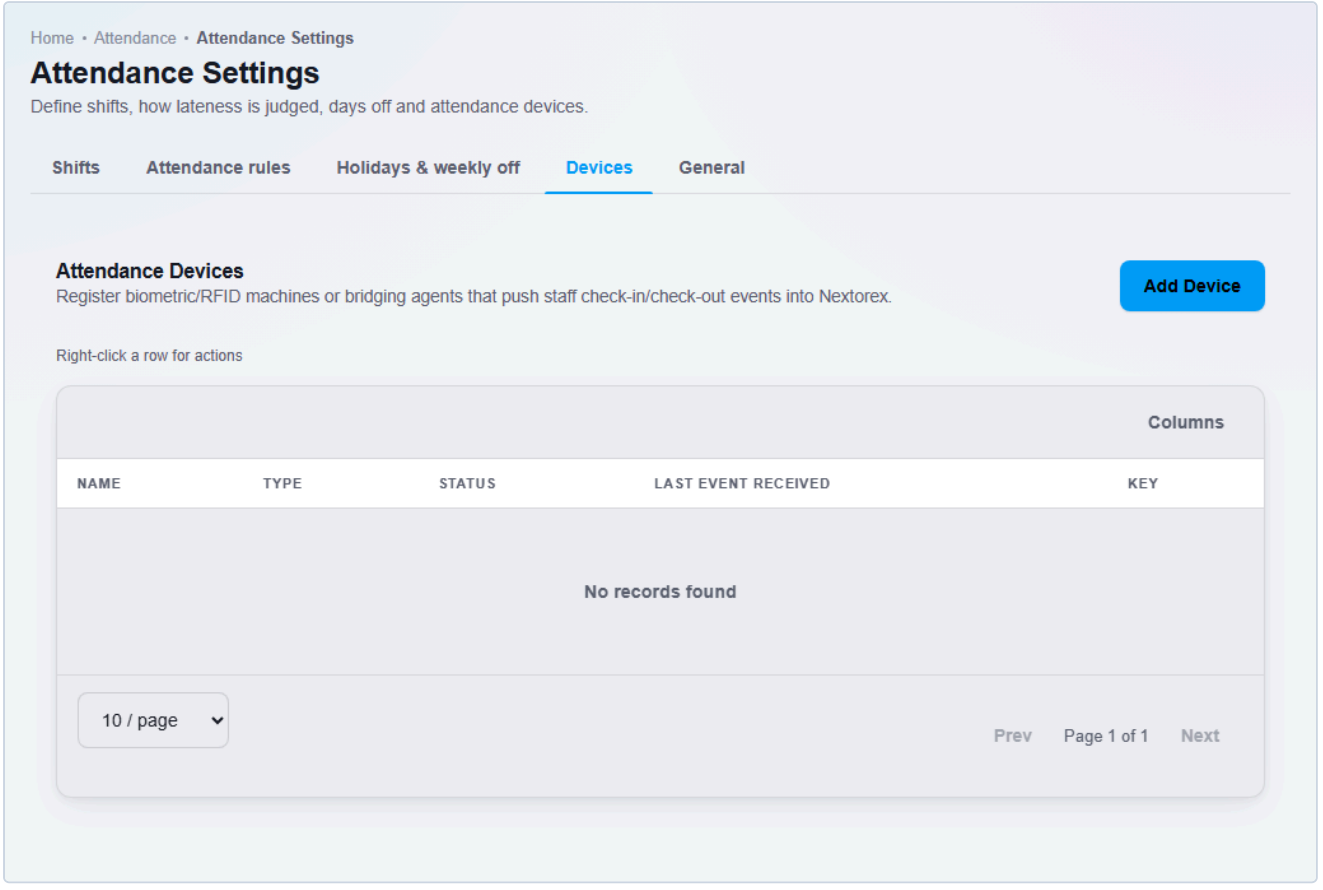
Shifts: name, time, default and status.



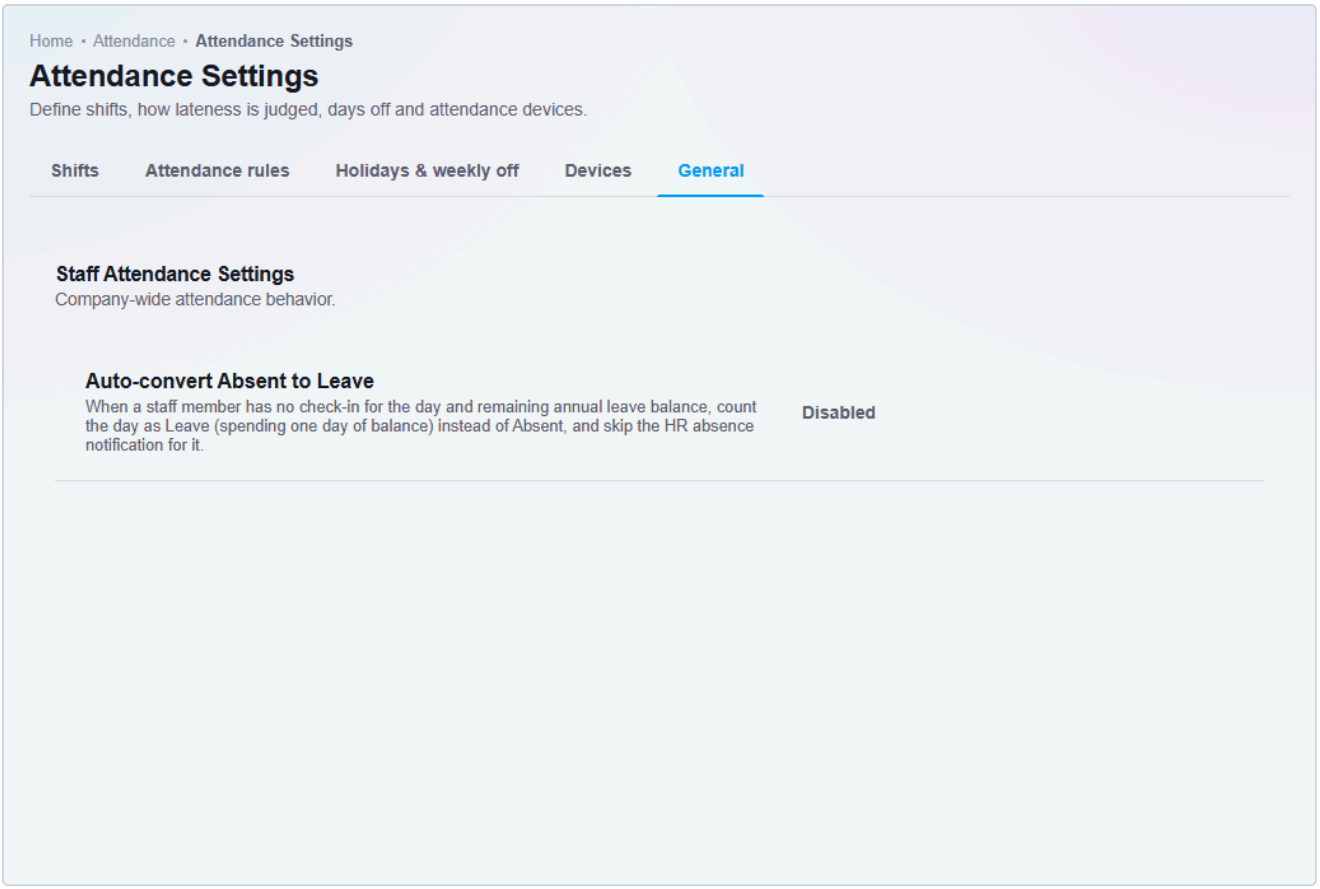
The grace time and the limits for a full or half day.



Weekly off days and holidays. A matching date becomes a day off.



Registered devices. Device configuration is for authorized administrators.



Company-wide attendance behaviour.

Add holidays **before** the days they fall on, so a school holiday is never judged as an absence. When **Auto-convert Absent to Leave** is on, a day with no check-in becomes **Leave** while the staff member still has annual balance, instead of **Absent**. It is off until you turn it on.

Important rules

- One staff member uses one User seat.
- Check In and Check Out record the system's time. Staff cannot choose it. Only a manager can correct times, and a correction needs a reason.
- Only **Approved** leave becomes **Leave**. A **Pending** request changes nothing.
- Approved leave and day-off rows cannot be edited.
- **Absent** is never given to a future day.
- Attendance and Payroll are separate. See Payroll.
- Student attendance is separate from staff attendance. See Student attendance.

Common mistakes

- Forgetting to add holidays, so a school holiday looks like an absence.
- Expecting a leave request to count before a manager approves it.
- Choosing a Role that gives the person too little or too much access. Check the role.
- Losing the temporary password. It is shown once.

Related guides

- Payroll
- Student attendance
- Roles
- Timetable
- Add a user
- Education plans, limits and combining apps

Payroll

Generate monthly payslips for your staff, review them, finalise the month, pay each payslip from a cash or bank account, and see what happens when the balance is too low.

Plan: Education Campus

What this does

Payroll creates one **payslip** for every active staff member for a month. Each payslip starts from the staff member's salary, subtracts deductions and any advance installment, and shows the **net pay**. You then pay each payslip from a cash or bank account.

Payroll is a separate workflow from attendance. Attendance records who worked and when. Payroll only uses the month's records when a deduction rule depends on absences or late arrivals. See Staff and staff attendance.

Who can use it

Staff whose role includes the Payroll permissions: view, manage (generate and finalise) and pay. Education finance access is **intentionally limited**: payroll payments use the shared finance screens, not the full ERP or POS accounting application. See Education receipt and payment vouchers.

You see payroll only for the staff in your own place in the hierarchy and the places beneath it. A manager of one Sub Unit does not see the payslips of another Sub Unit.

Which package includes it

Education Campus. Education Essentials and Education Standard do not include Payroll.

Where to find it

Open **HR**, then **Payroll**, then **Payroll Runs**. The same group holds **Staff Advances** and **Deduction Rules**.

Before you start

- Add your staff and set their salaries on the **Staff** screen. See Staff and staff attendance. If an active staff member has no salary, the page warns you that they would be paid 0 and links to the **Staff** screen.
- Record the month's attendance. Deductions that depend on absences or late arrivals use this month's records.
- Make sure the account you will pay from has enough money. Receipts from students add money to it.

The page

The **Pay period** chooses the month. You can also filter by **Staff**, **Status** (**Waiting to be paid** or **Paid**) and, when you can see more than one unit, **Unit**. Click **Apply** after you change a filter.

The table shows each staff member by **name** and employee code. It does not show internal numbers.

Column	What it shows
Staff	The staff member's name and employee code.
Unit	Their unit. It appears when you can see more than one unit.
Period	The month, for example 2026-10.
Gross	The salary before deductions.
Deductions	Deduction rules and any advance installment. Hover to see the advance part.
Net pay	What the staff member is paid.
Status	**Draft**, **Ready to pay** or **Paid**.
Paid on	The date it was paid.
Actions	A print icon for the payslip and, for an unpaid payslip, the **Pay** button.

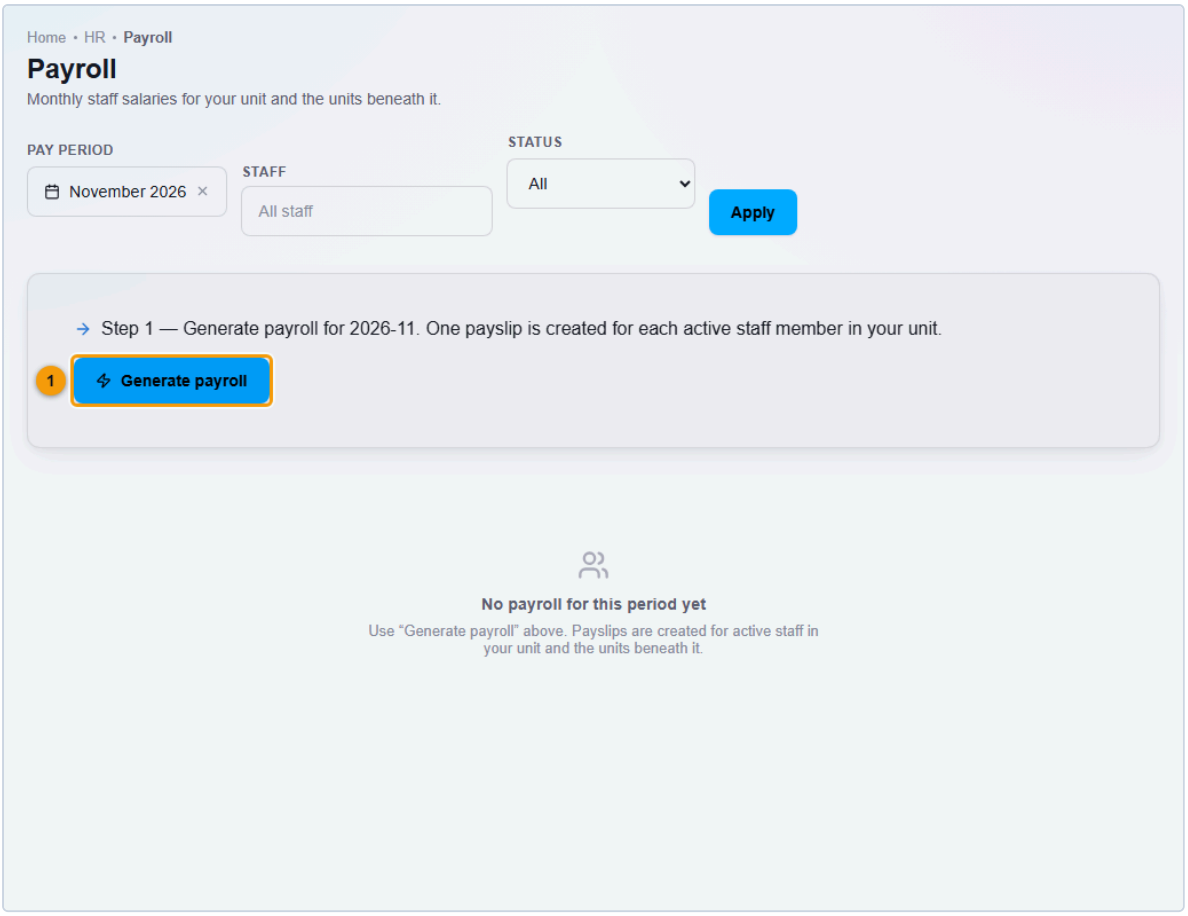
The tiles above the table show **Payslips** paid out of the total, **Gross**, **Deductions** and **Net pay**.

A box above the tiles always tells you the next step, for example **Step 1 — Generate payroll**, **Step 2 — Review the payslips** or **Step 3 — payslips are waiting to be paid**.

Steps: Generate, Review, Finalise, Pay

1. Generate

1. Open **Payroll Runs** and choose the **Pay period**, the month you want to pay.
2. Click **Generate payroll** (1). Generating can take a little while, because the month's attendance is closed first.

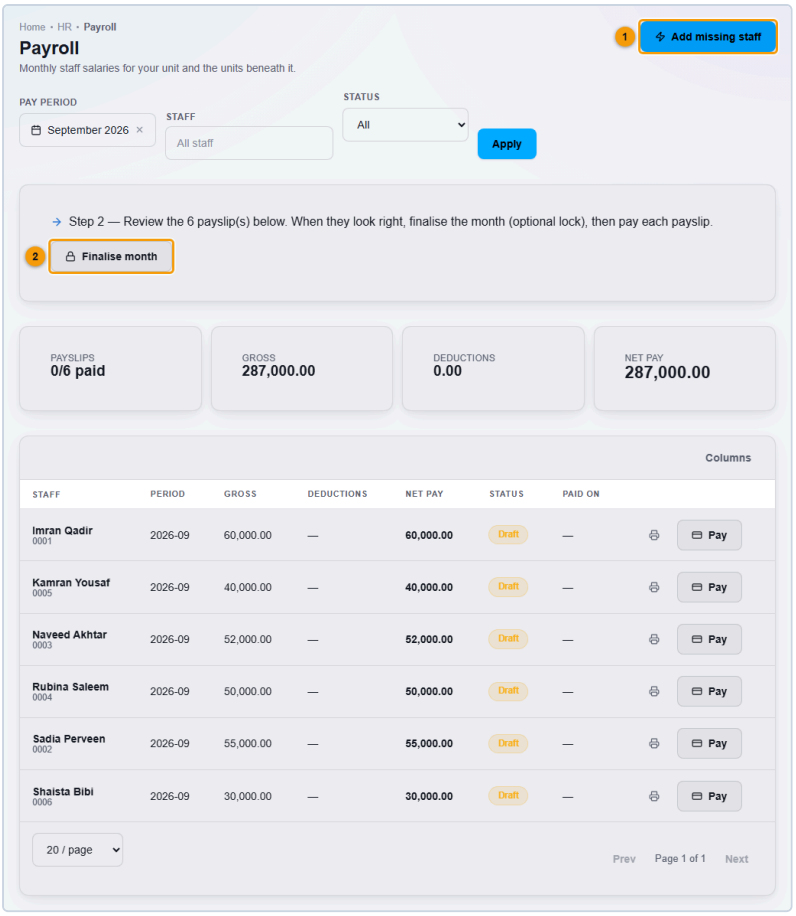


Choose the month, then click Generate payroll (1).

A **Draft** run appears with one payslip for each active staff member in your unit and the units beneath it.

2. Review

Check each payslip: the gross, the deductions and the net pay. The box above the tiles says **Step 2 — Review**. If you add a staff member before you finalise, click **Add missing staff** (1). It adds payslips only for staff who do not have one. Payslips that already exist are never created twice.



A Draft run. Add missing staff (1) is available only while the run is a draft. Finalise month (2) closes the month.

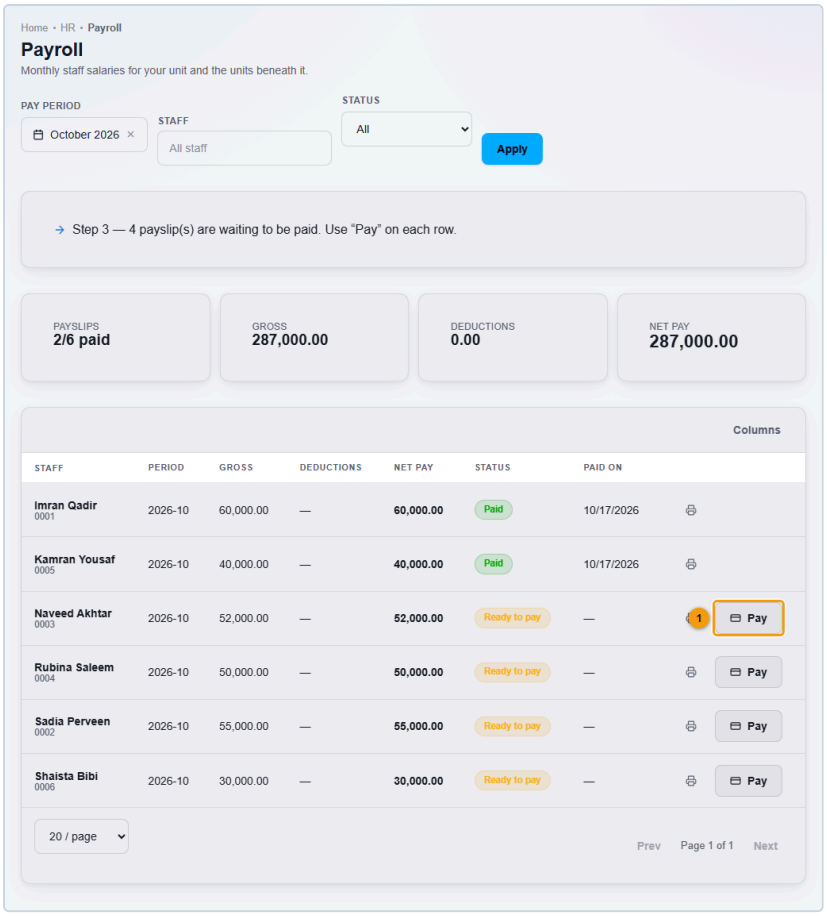
3. Finalise

Click **Finalise month** (2) and confirm when the payslips look right. The status changes from **Draft** to **Ready to pay**.

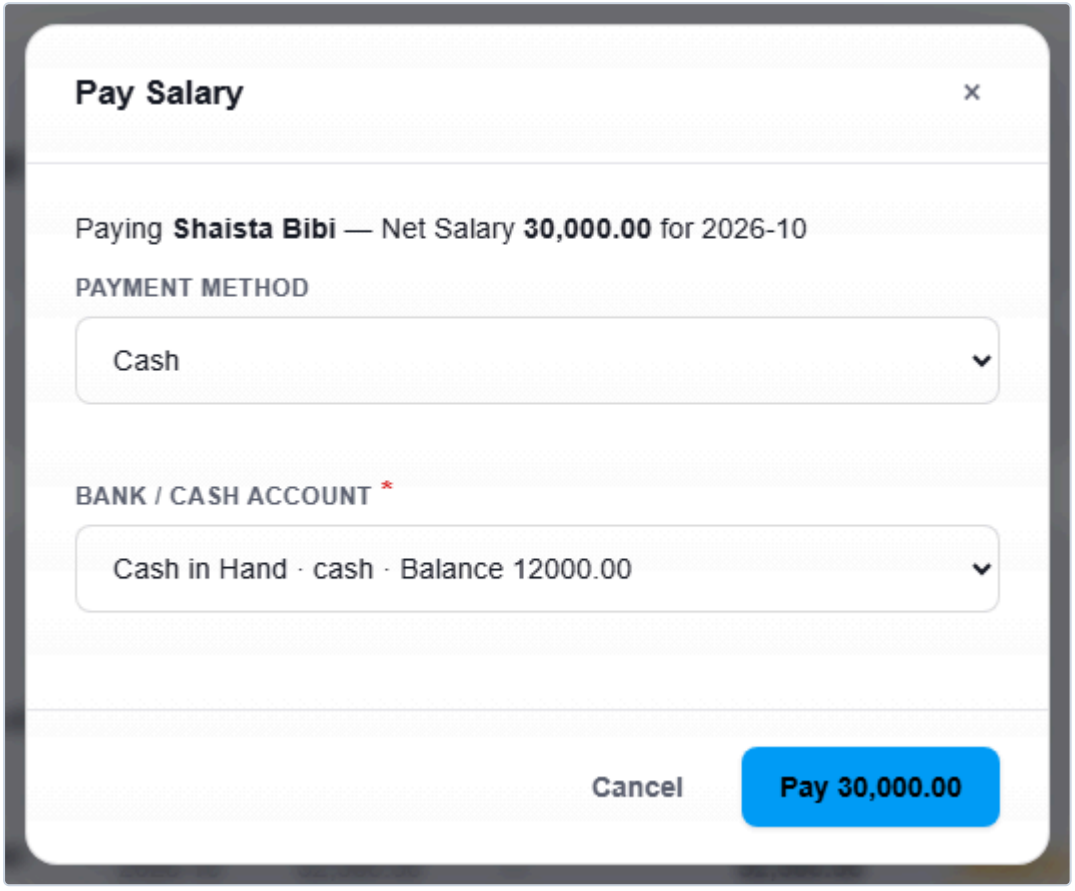
A finalised run is **locked**. The **Add missing staff** button goes away and no new payslips are added to that month. A staff member who joins after you finalise is therefore not part of that run. This is how the month is kept fixed, so review who is included **before** you finalise.

4. Pay

1. Click **Pay** on a payslip's row.
2. Choose the **Payment method** (**Cash**, **Bank Transfer** or **Cheque**) and the **Bank / Cash account**. The list shows each account's balance.
3. Click the **Pay** button, which shows the amount.

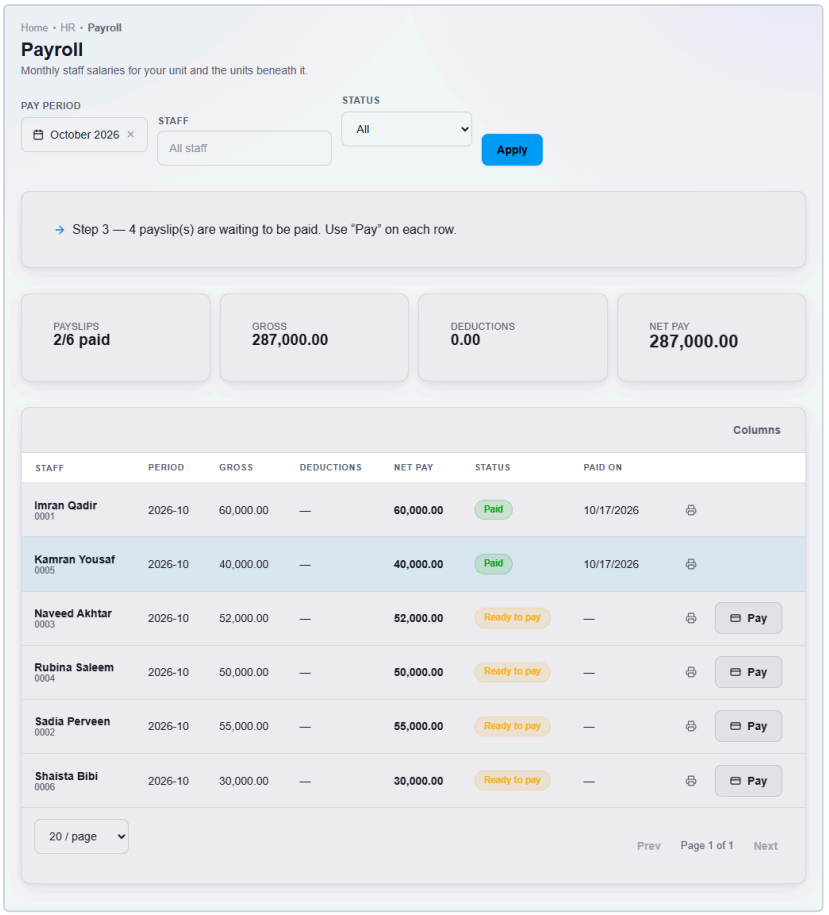


A finalised month. Unpaid payslips show Ready to pay and have a Pay button (1).



The Pay Salary window shows the staff member, the net salary and the account balance.

The message **Salary paid.** appears and the status changes to **Paid**, with the date in **Paid on**. The tile shows how many are paid, for example **2/6 paid**.

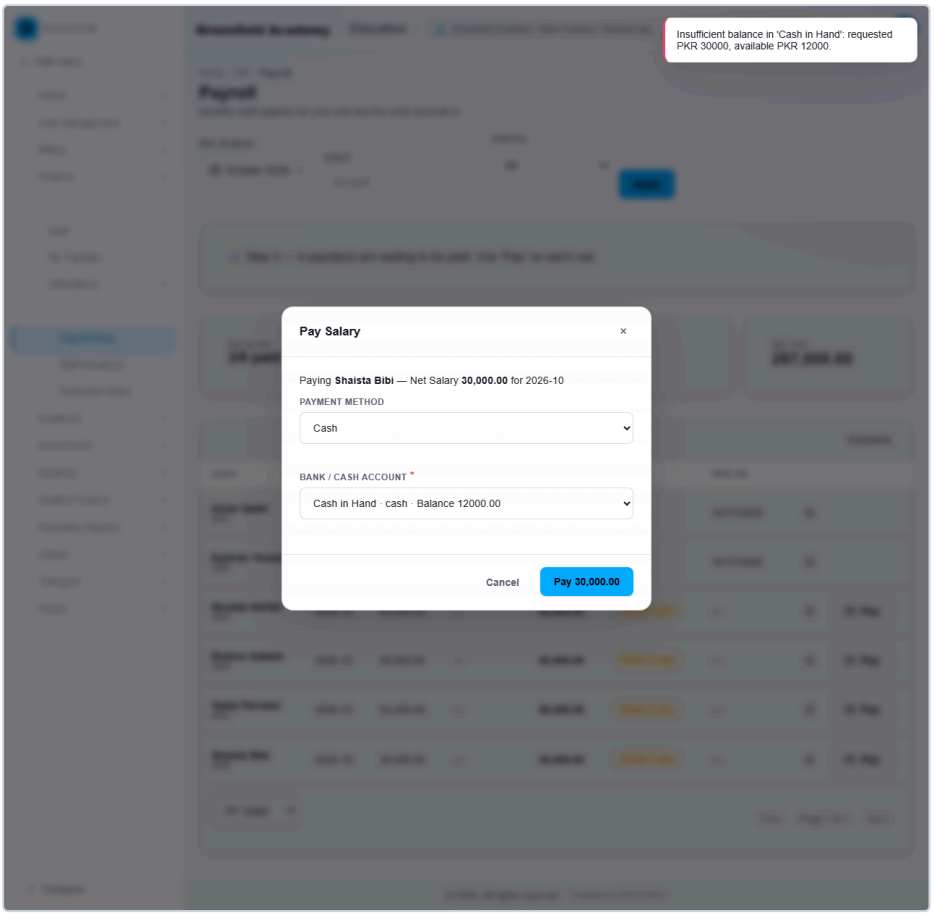


Paid payslips show Paid and the date. The others still wait.

You pay each payslip separately. The normal order is to finalise first, but the **Pay** button is also shown on **Draft** payslips. Paying a payslip posts the payment to your cash or bank account through the shared finance screens. This guide does not cover full accounting.

When the balance is too low

If the account holds less than the net pay, the payment is **refused** and nothing is posted. The message shows the amount requested and the amount available, for example *Insufficient balance in 'Cash in Hand': requested PKR 30000, available PKR 12000.* Add money to the account, for example by recording a student receipt, then pay again. The payslip stays unpaid until it is paid.



A payment larger than the account balance is refused.

Advances and deductions

- **Staff Advances**: advance salary given to staff. It is recovered through a fixed monthly installment the next time payroll is generated.
- **Deduction Rules**: salary deductions applied automatically when payroll is generated. Flat and percentage rules apply to every active staff member. Attendance-based rules use that month's absent and late counts.

Each payslip shows the deductions and advance installment that were applied.

The payroll cost report

Education Reports, then **Payroll Cost Report**, shows the total net pay per month and a trend across recent months. See Education reports and dashboard.

Important rules

- One payslip per staff member per month.
- A finalised month is locked: no new payslips are added to it.
- A payslip that is already paid cannot be paid again.
- A payslip with a net pay of zero has nothing to pay.
- A payment can never take an account below zero.

- You see payroll only for staff in your own place in the hierarchy and the places beneath it.

Common mistakes

- Generating payroll before the month's attendance is recorded.
- Finalising before checking who is included. A staff member added afterwards is not in the finalised run.
- Trying to pay salaries when the cash or bank account is empty. Record receipts first.
- Expecting the run to pay everyone at once. You pay each payslip separately.

Related guides

- Staff and staff attendance
- Education receipt and payment vouchers
- Education reports and dashboard

Exams, marks and report cards

Set up terms and grading, create an exam, enter marks, publish the results and print each student's report card.

Plan: Education Standard and above

What this does

You create an **exam** for a Term and an Academic Group, say which Subjects it covers and the maximum marks of each. Teachers enter the marks. When you **publish** the exam, the marks are locked and each student has a **report card** with their marks, grades, total and percentage.

Who can use it

Staff with the Exam permissions to create and publish exams. Teachers with the permission to enter marks can enter marks only for the Subjects and Sections they are assigned to. Students can see their own published report cards.

Which package includes it

Education Standard and Education Campus. Education Essentials does not include exams.

Where to find it

Open **Assessment**. It holds **Exams** (with **All Exams**, **Marks Entry**, **Report Cards**, **Terms** and **Grading Schemes**).

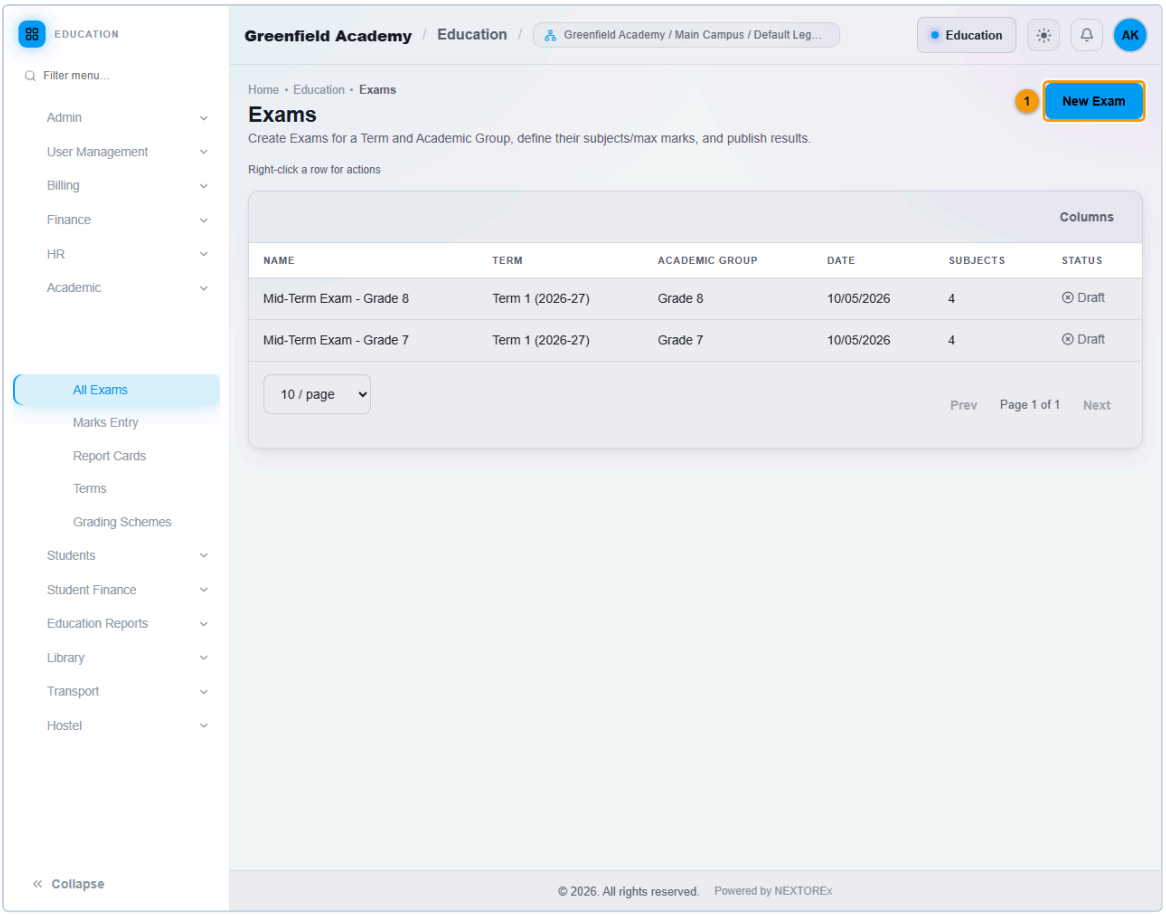
Before you start

Set up these three things once:

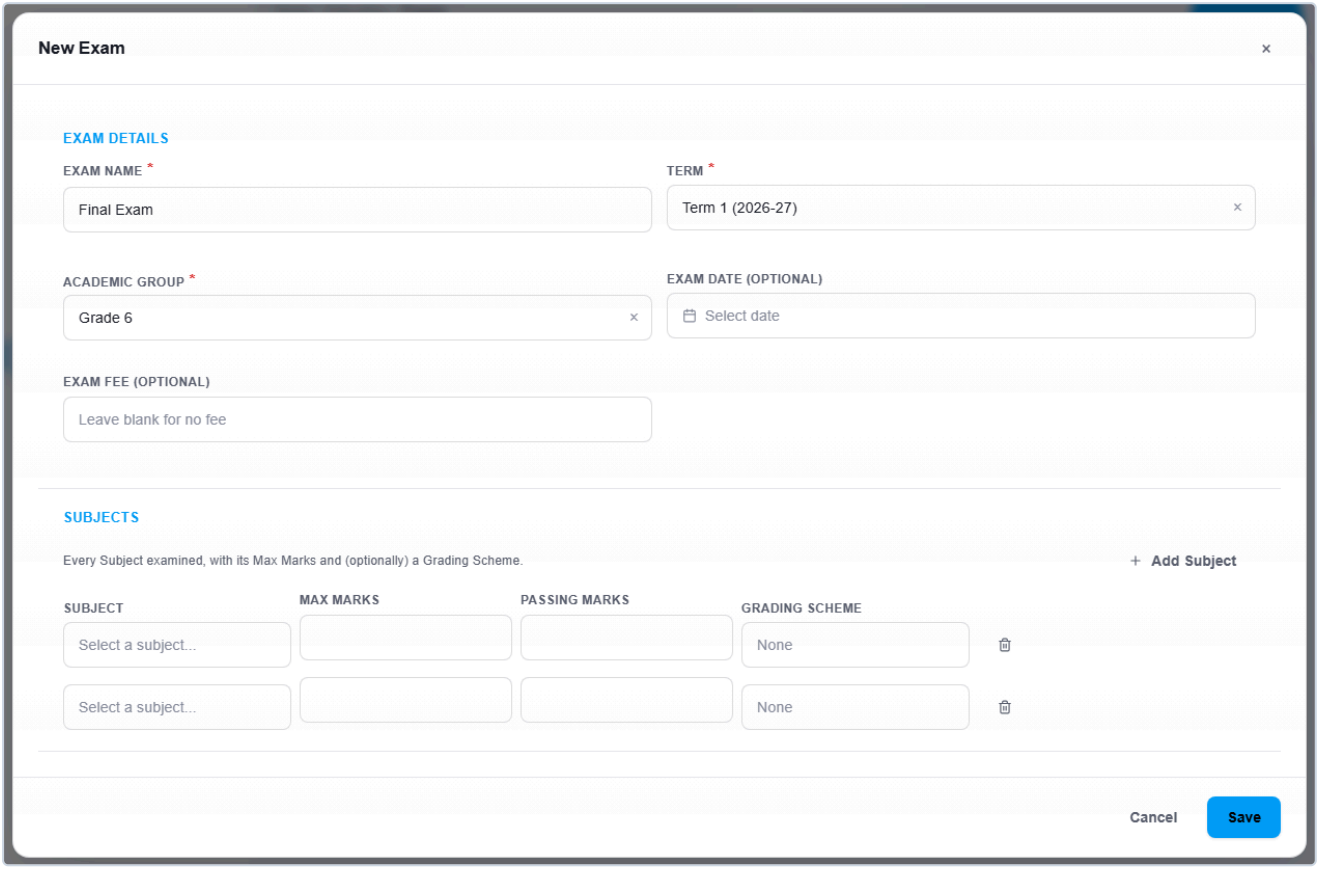
1. **Terms**: open **Terms** and click **New Term**. Enter the **Term Name**, **Start Date** and **End Date**.
2. **Grading Schemes**: open **Grading Schemes** and click **New Grading Scheme**. Choose the **Type** (**Percentage**, **GPA** or **Custom**) and click **Add Band** for each grade. Each band has a **Min Score**, a **Max Score** and a **Label**, for example 90 to 100 is `A+`.
3. Academic Groups, Sections and Subjects, and the teachers assigned to each Subject.

Steps: create an exam

1. Open **Assessment**, **Exams**, **All Exams** and click **New Exam** (1).
2. Enter the **Exam Name**, and choose the **Term** and the **Academic Group**.
3. Optionally set the **Exam Date**.
4. Click **Add Subject** for each Subject in the exam. Enter the **Max Marks**, the **Passing Marks** and, if you want, a **Grading Scheme**.
5. Click **Save**.



Each exam shows its Term, Group, date, number of Subjects and status. New Exam (1) creates one.

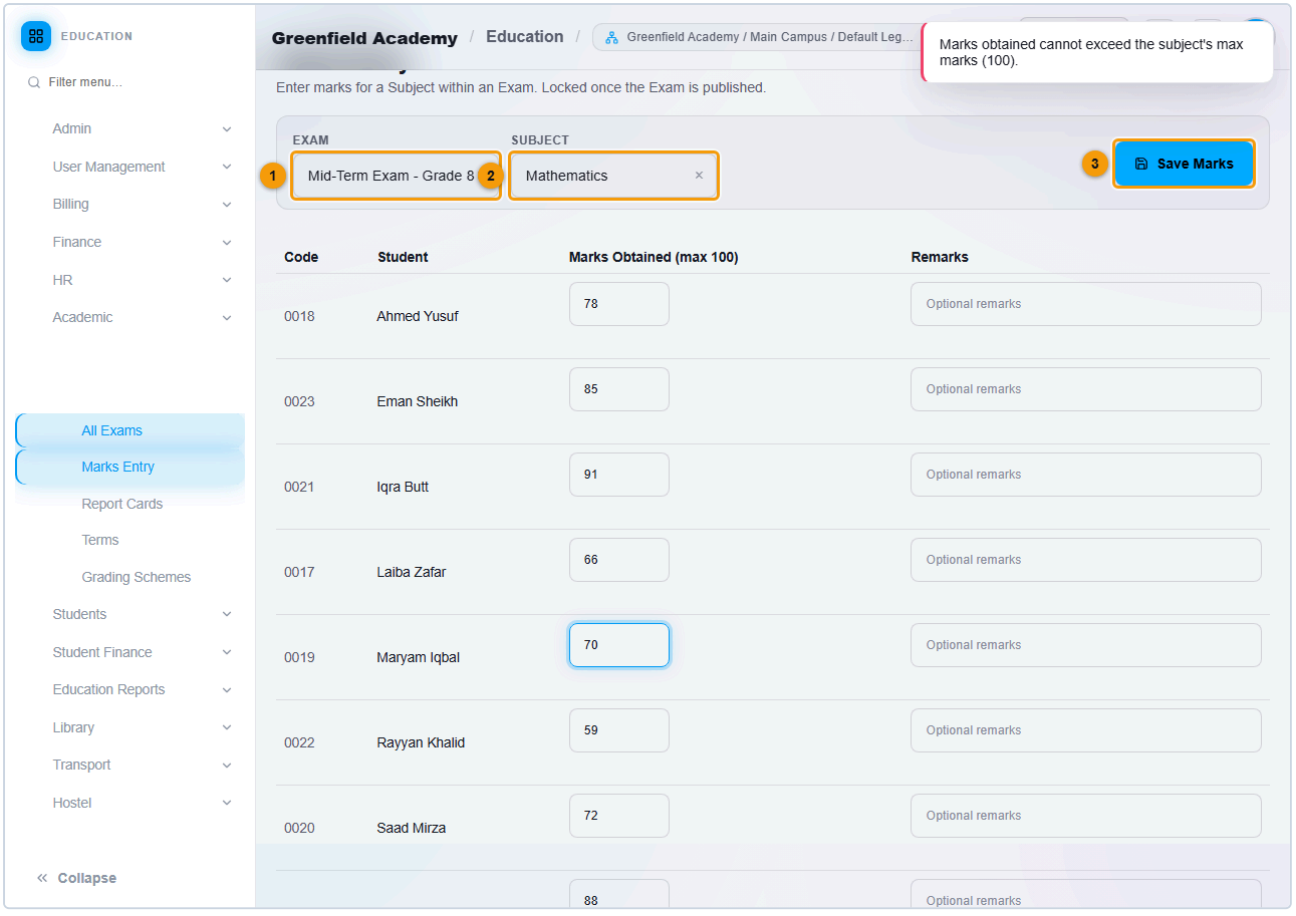


An exam belongs to one Term and one Group and lists the Subjects with their maximum marks.

A new exam is a **Draft**.

Steps: enter marks

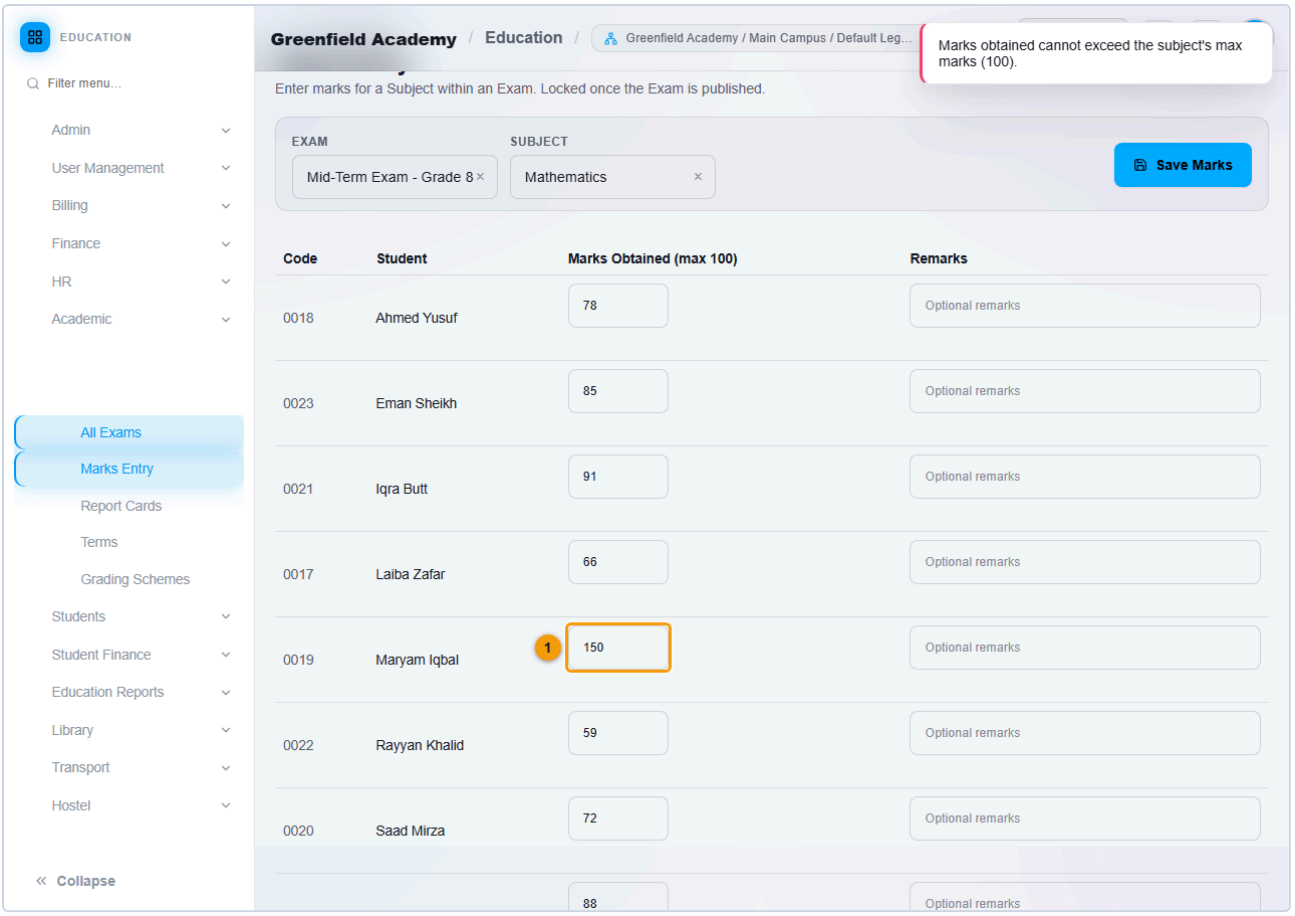
1. Open **Assessment**, **Exams**, **Marks Entry**.
2. Choose the **Exam** (1) and the **Subject** (2). Each Subject shows its maximum, for example *Mathematics max 100*.
3. Type each student's **Marks Obtained**. Add a **Remarks** note if you want.
4. Click **Save Marks** (3).



Choose the Exam (1) and the Subject (2), type the marks and click Save Marks (3).

Invalid marks are refused

A mark above the Subject's maximum is not saved. NEXTOREx shows *Marks obtained cannot exceed the subject's max marks (100)* and keeps the page so you can correct the number.

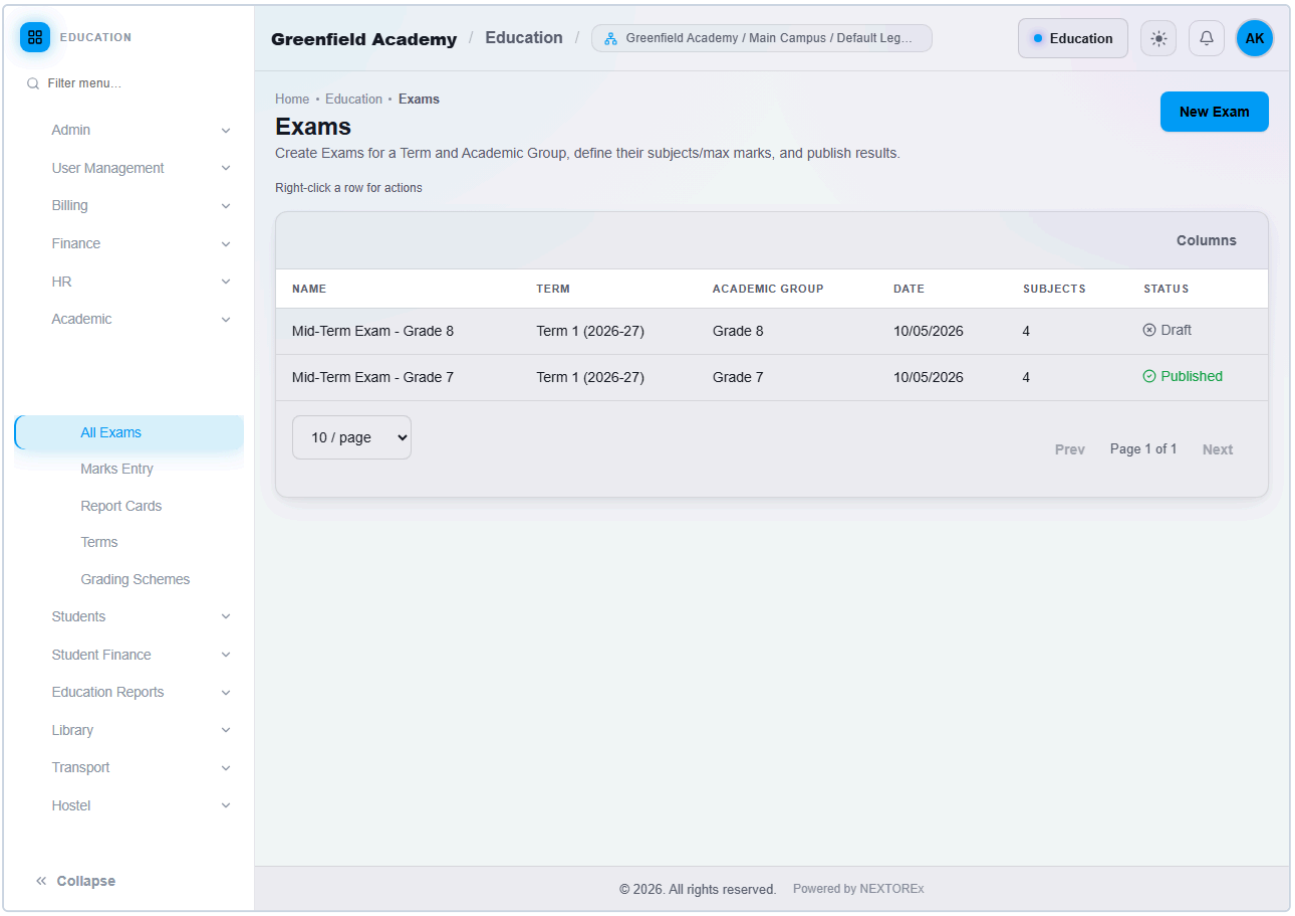


150 is more than the maximum of 100, so the marks are not saved until it is corrected.

When all marks are valid, a message such as **8 mark(s) saved.** confirms the save.

Steps: publish the results

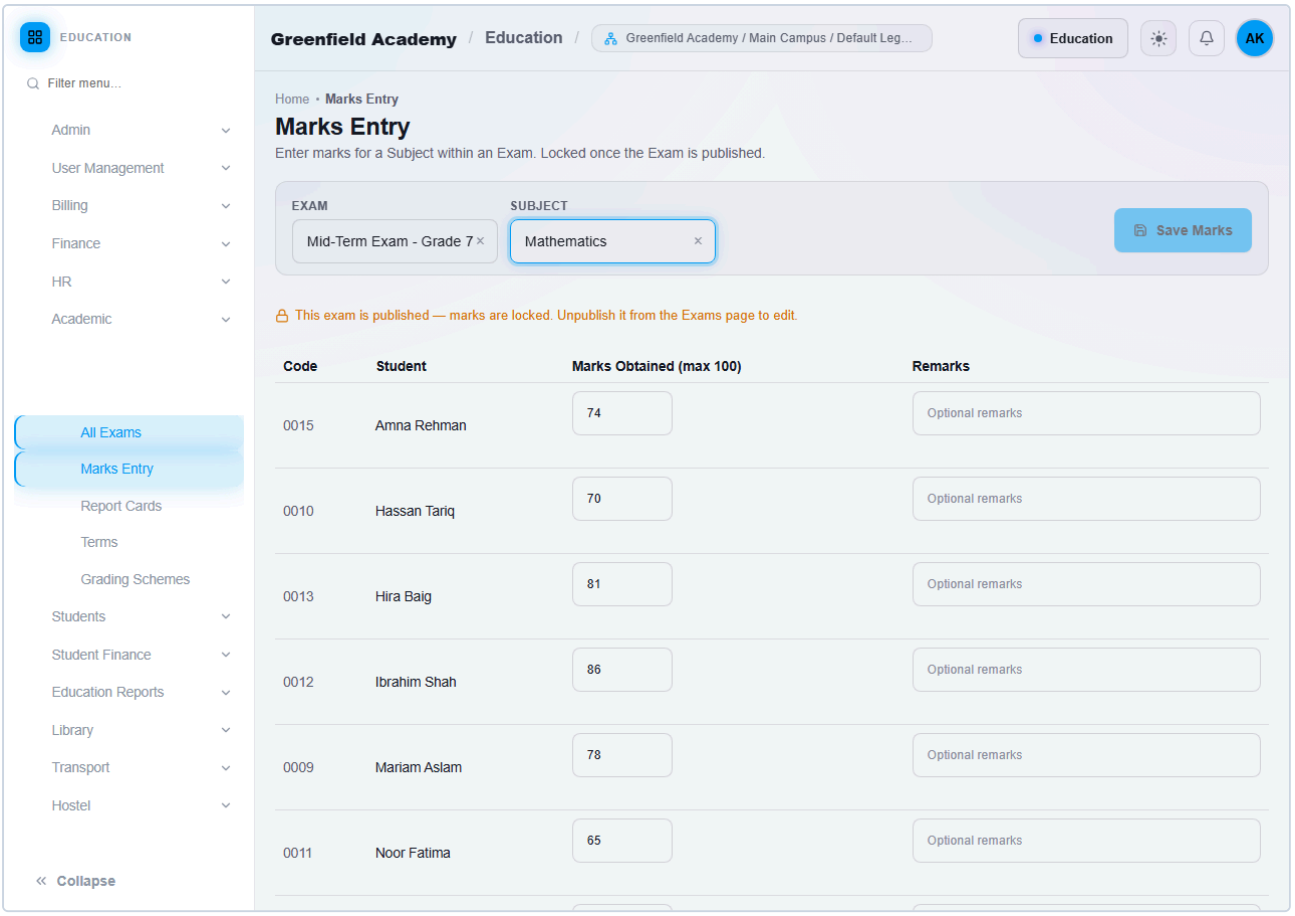
1. Open **All Exams**, right-click the exam and choose **Publish**.
2. The exam status changes from **Draft** to **Published**.



The Grade 7 exam is Published. The Grade 8 exam is still a Draft.

Marks are locked after publishing

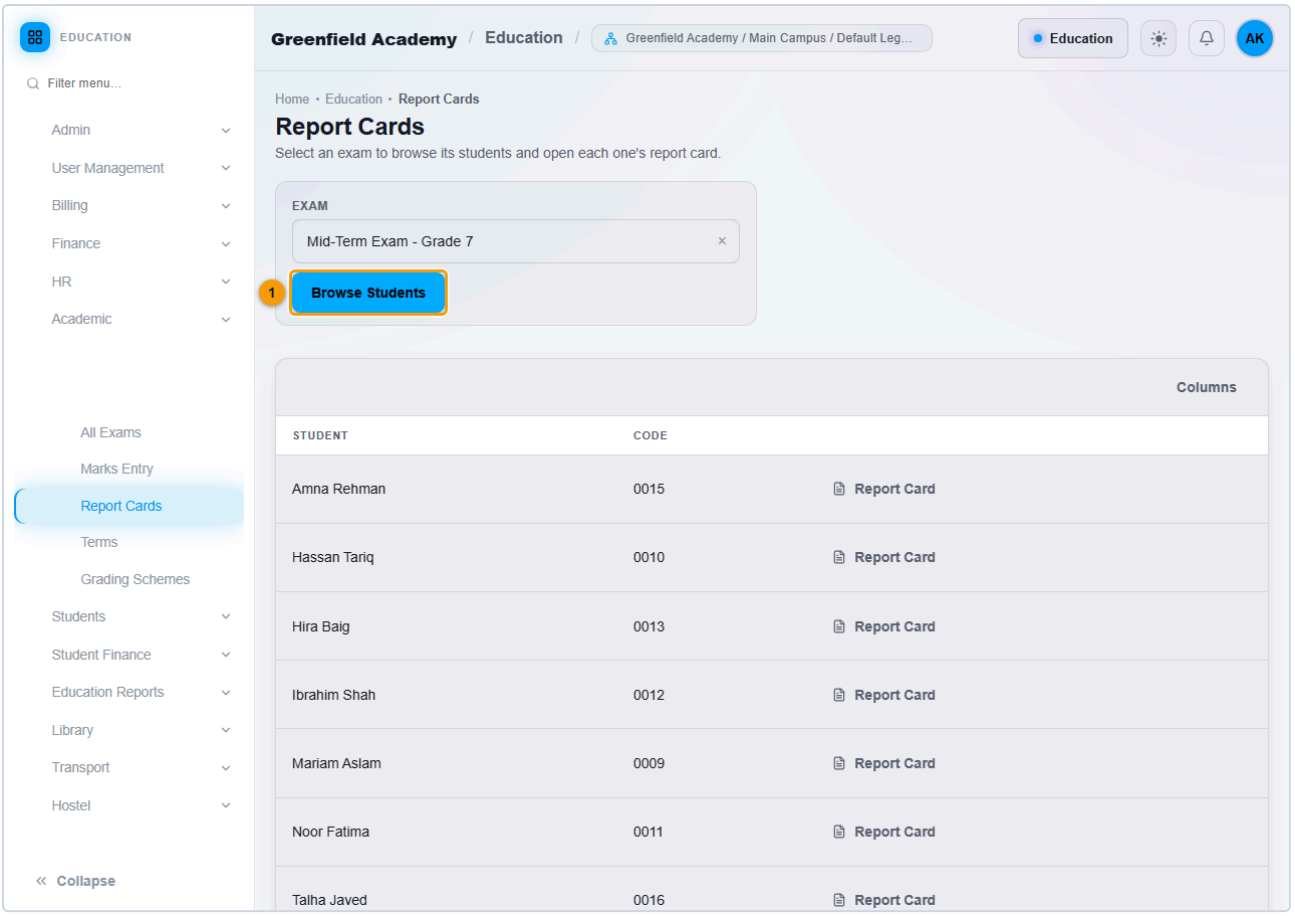
On **Marks Entry**, a published exam shows *This exam is published, marks are locked. Unpublish it from the Exams page to edit.* To change a mark, right-click the exam on **All Exams**, choose **Unpublish**, correct the marks and publish again.



A published exam cannot be edited on Marks Entry.

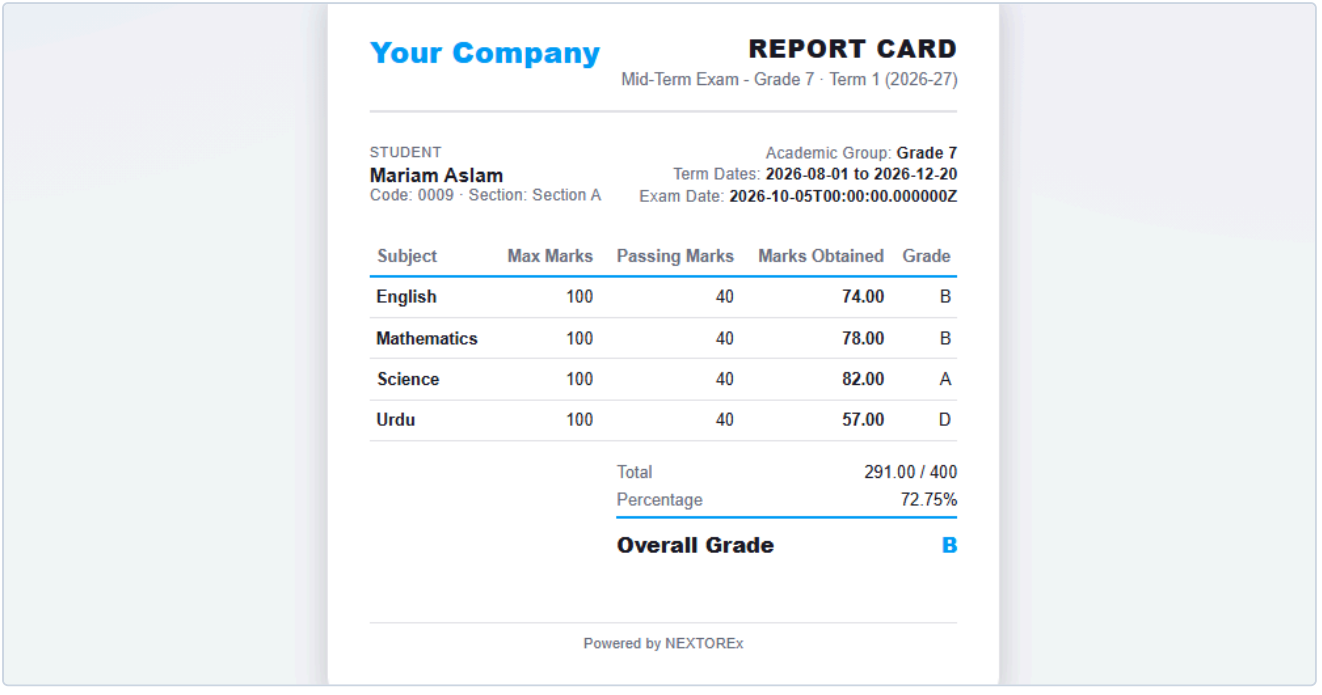
Report cards

1. Open **Assessment**, **Exams**, **Report Cards**.
2. Choose the **Exam** and click **Browse Students** (1).
3. Click **Report Card** on a student's row.



Choose an exam and click Browse Students (1). Each student has a Report Card link.

The report card shows each Subject with its maximum marks, passing marks, marks obtained and grade, then the **Total**, **Percentage** and **Overall Grade**. Use **Print** to print it. A card for an exam that is not published yet is marked as a preview. The heading at the top shows the brand name from your branding settings. If no brand name has been set, it reads **Your Company**.



Your Company

REPORT CARD

Mid-Term Exam - Grade 7 · Term 1 (2026-27)

STUDENT
Mariam Aslam
Code: 0009 · Section: Section A

Academic Group: **Grade 7**
Term Dates: **2026-08-01 to 2026-12-20**
Exam Date: **2026-10-05T00:00:00.000000Z**

Subject	Max Marks	Passing Marks	Marks Obtained	Grade
English	100	40	**74.00**	B
Mathematics	100	40	**78.00**	B
Science	100	40	**82.00**	A
Urdu	100	40	**57.00**	D

Total 291.00 / 400
Percentage 72.75%

Overall Grade **B**

Powered by NEXTOREx

A student's report card for a published exam.

Students see their own published report cards. The **Exam Results Analytics** report shows pass rates for a published exam. See Education reports and dashboard.

Important rules

- Marks cannot be more than the Subject's maximum.
- A published exam is locked. Unpublish it first to change marks.
- A teacher can enter marks only for the Subjects and Sections assigned to them.
- Only published exams are available in the Exam Results Analytics report.

Common mistakes

- Publishing before every Subject's marks are entered.
- Creating an exam before the Term exists.
- Forgetting to assign the teacher to the Subject and Section, so the teacher cannot enter marks.

Related guides

- Staff and staff attendance
- Timetable
- Education reports and dashboard

Timetable

Define periods and rooms, then build the weekly timetable of each Section, with clashes for Sections, teachers and rooms stopped for you.

Plan: Education Standard and above

What this does

The **Timetable** shows the week of one Section: for every period of every day, which Subject is taught, by which teacher, in which room. NEXTOREx stops you from booking the same Section, teacher or room twice in the same slot.

Who can use it

Staff with the Timetable permissions can create and change timetables. Teachers and students can see the timetable they are allowed to see.

Which package includes it

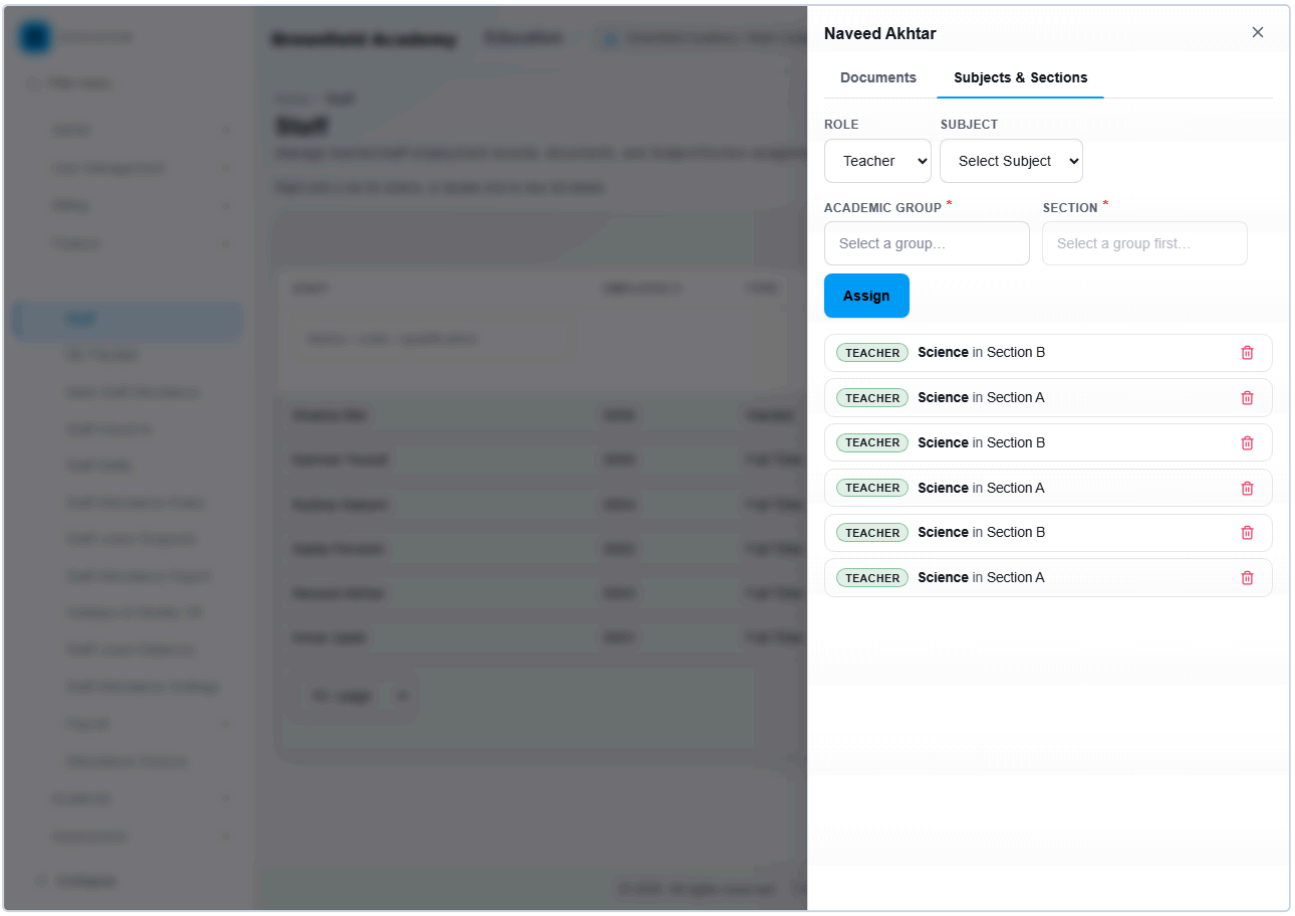
Education Standard and Education Campus. Education Essentials does not include the Timetable.

Where to find it

Open **Academic**, then **Timetable**. It holds **Timetable**, **Rooms** and **Periods**.

Before you start

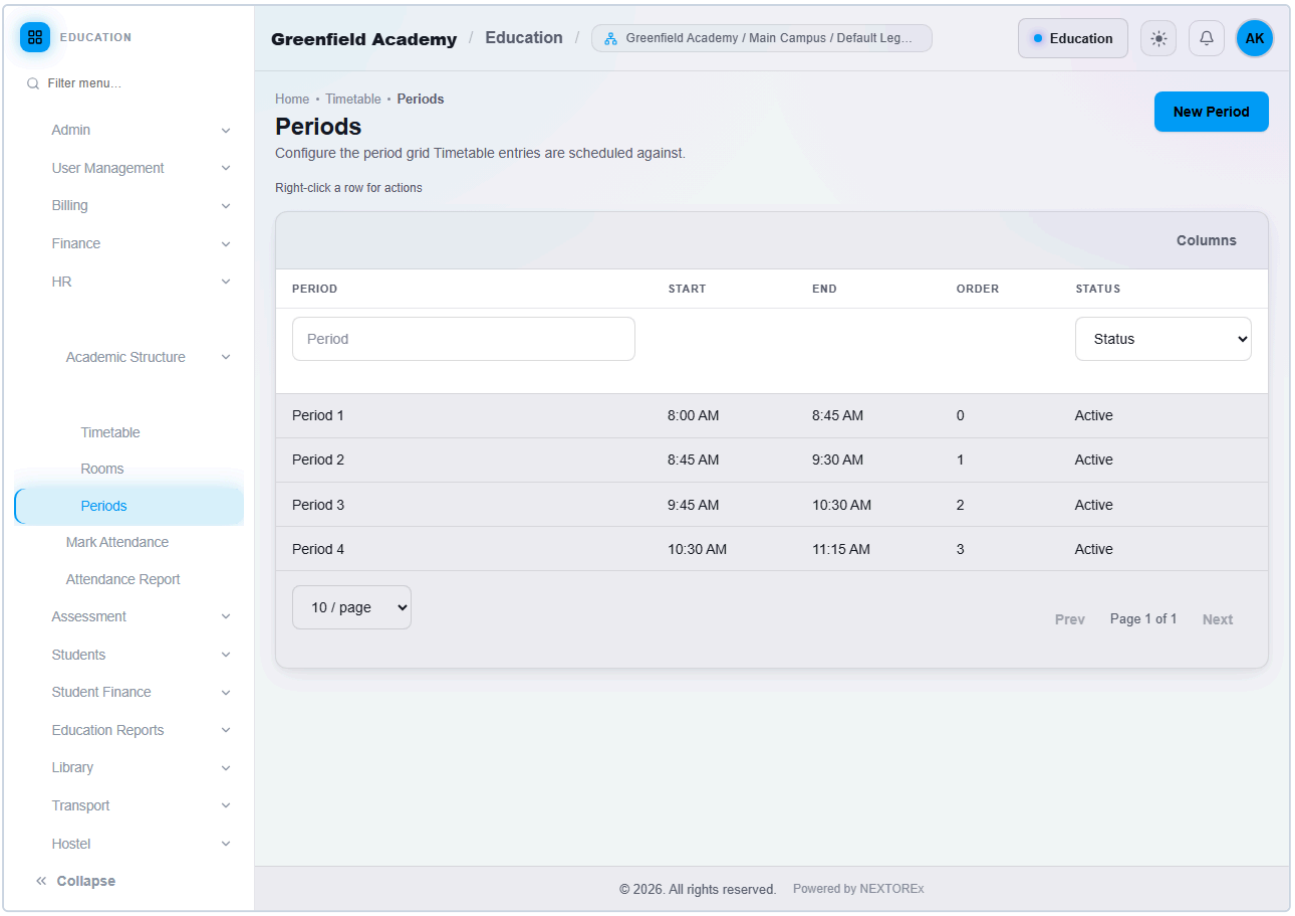
1. Create your Groups, Sections and Subjects. See Education getting started and academic structure.
2. Add your teachers and assign each one to the Subjects and Sections they teach. See Staff and staff attendance. Only teachers assigned to a Subject in a Section can be placed on that Section's timetable.



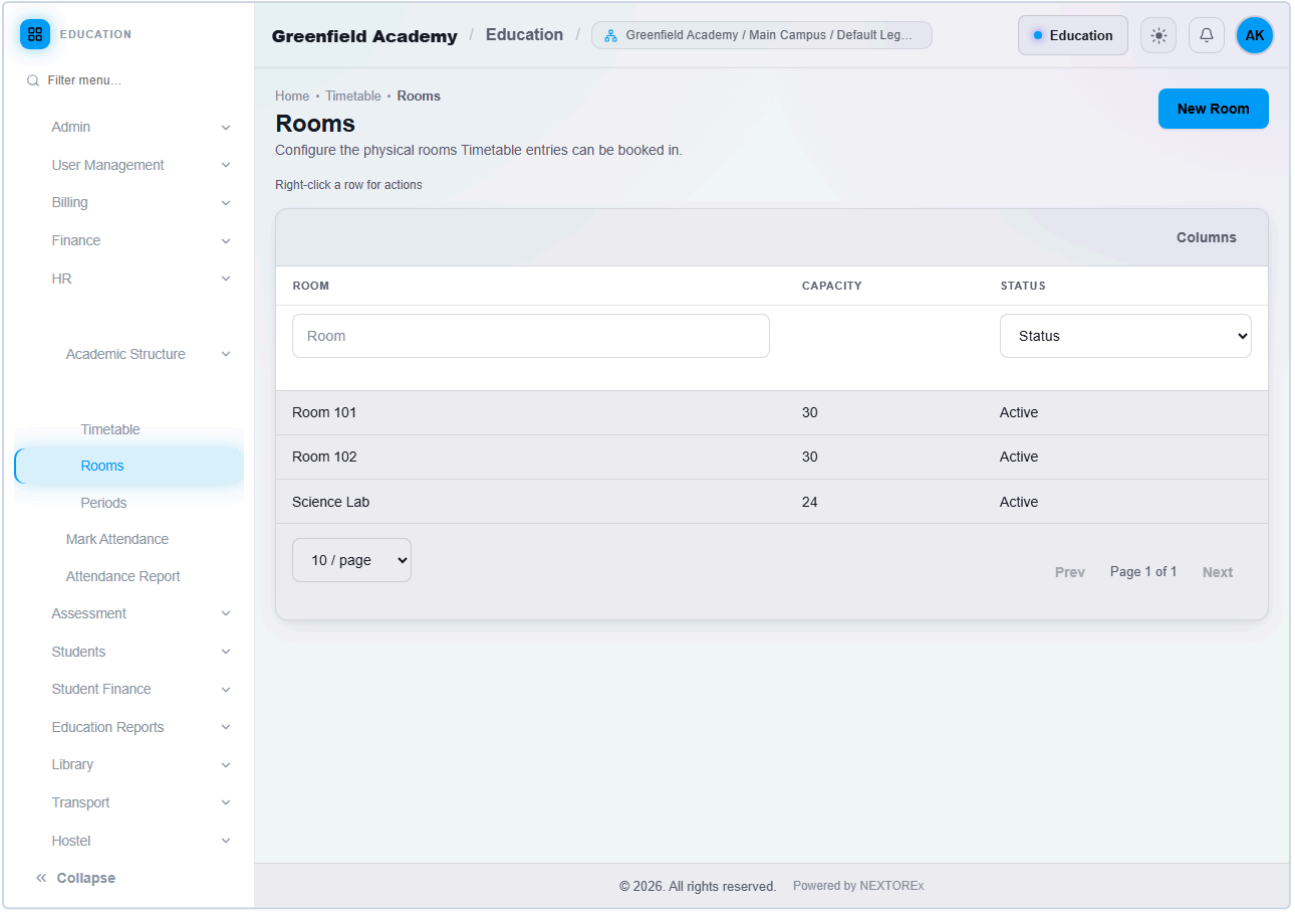
A teacher must be assigned to a Subject and Section before the timetable accepts them.

Steps: create the periods and rooms

1. Open **Timetable**, then **Periods**. Click **New Period** and enter a **Name** (for example `Period 1`), the **Start** and **End** times and the order.
2. Open **Rooms**. Click **New Room** and enter a **Name** and, if you want, the **Capacity**.



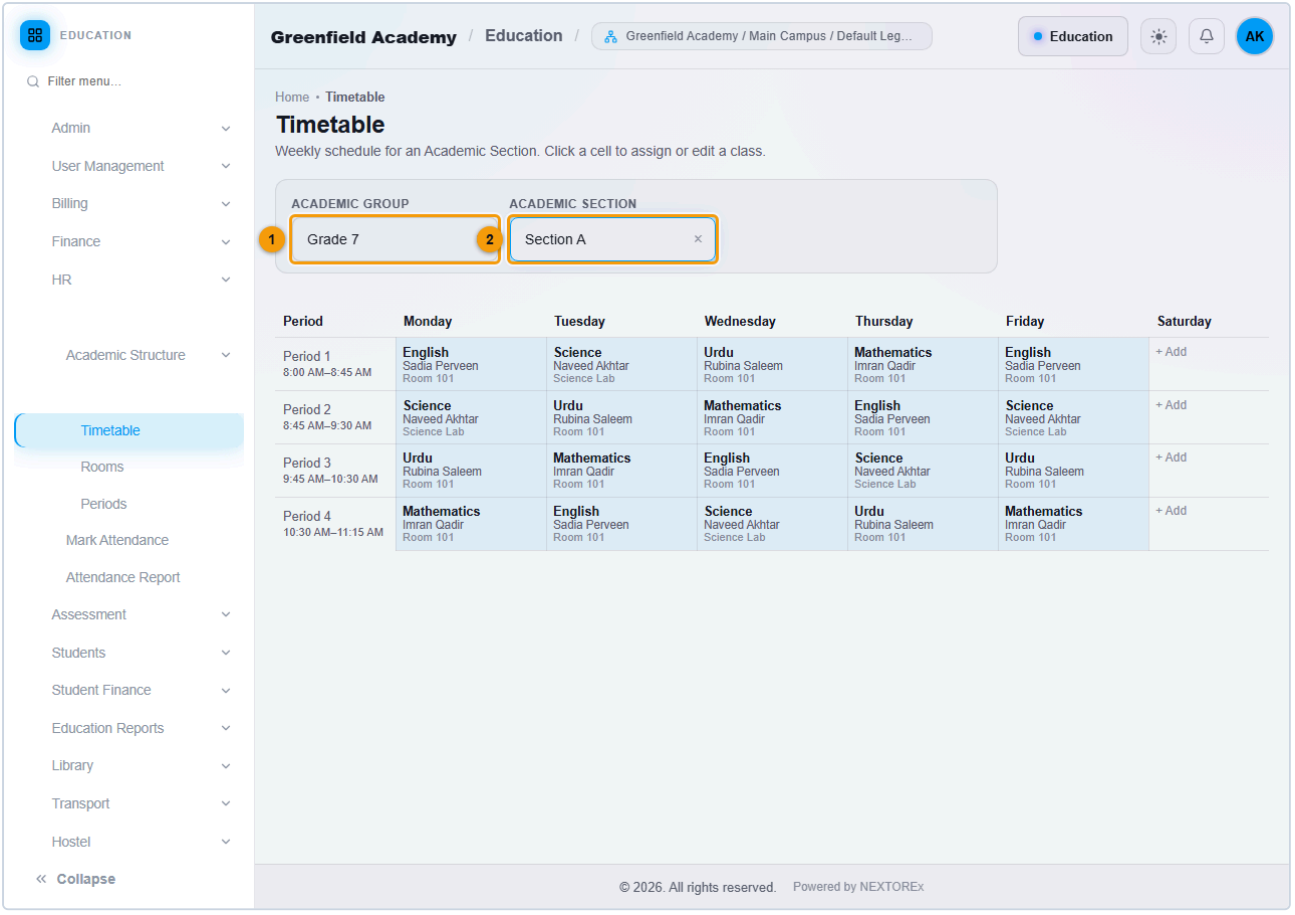
The periods of the school day.



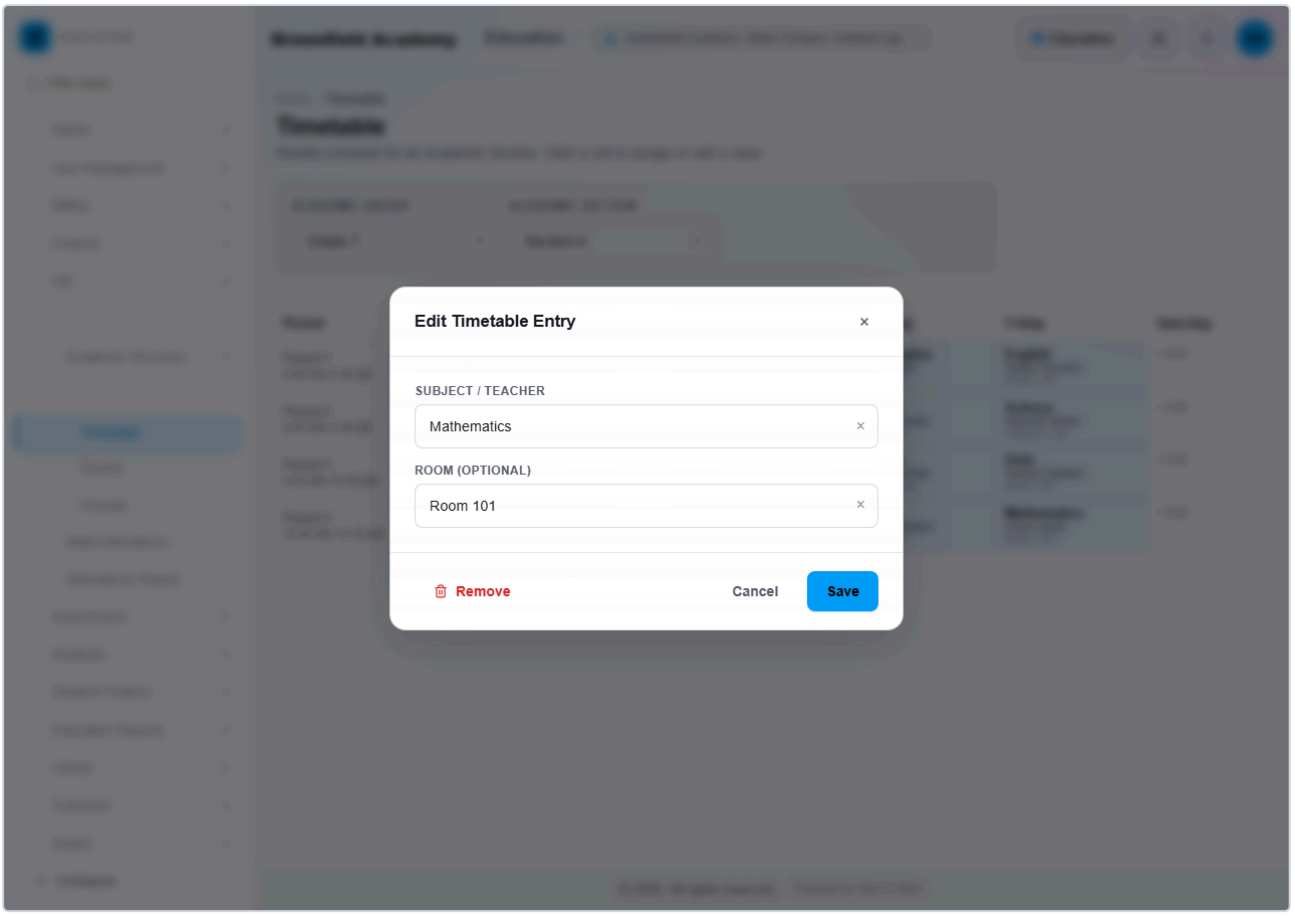
The rooms that classes can be booked in.

Steps: build a Section's timetable

1. Open **Timetable**, then **Timetable**.
2. Choose the **Academic Group** (1), then the **Academic Section** (2). The weekly grid appears with one row per period.
3. Click **+ Add** in an empty cell, or click a filled cell to change it.
4. Choose the **Subject / Teacher**. The list shows each Subject with the teachers assigned to it for this Section.
5. Choose a **Room** if you want.
6. Click **Save**. To clear a cell, open it and click **Remove**.



The week of one Section. Choose the Group (1) and Section (2), then click a cell.



Each cell takes a Subject with its teacher and an optional room.

Clashes are refused

NEXTOREx refuses a booking and explains why when:

- the Section already has a Subject at that day and period,
- the teacher is already teaching another Section at that day and period, or
- the room is already booked for another Section at that day and period.

The teacher must also be assigned to that Subject in that Section.

What happens next

Teachers and students see the timetable they are allowed to see. A student's profile shows the class that is in session now, or that none is.

Important rules

- One Subject per Section per period per day.
- A teacher cannot be in two places at once.
- A room cannot be used by two Sections at once.
- The grid lists the periods you created, in order.

Common mistakes

- Trying to place a teacher who has not been assigned to the Subject and Section.
- Creating the timetable before the periods exist.
- Giving two Sections the same teacher in the same period.

Related guides

- Staff and staff attendance
- Exams, marks and report cards
- Education getting started and academic structure

Transport

Set up transport routes with a monthly flat fare, assign students to routes, keep the assignment history and generate monthly transport fees without duplicates.

Plan: Education Campus

What this does

Transport lets you define routes, give each route a monthly flat fare, assign students to routes and bill the fare as a fee every month. Each student is on one route at a time, and the history of earlier routes is kept.

Who can use it

Staff whose role includes the Transport permissions, normally the administration or accounts team.

Which package includes it

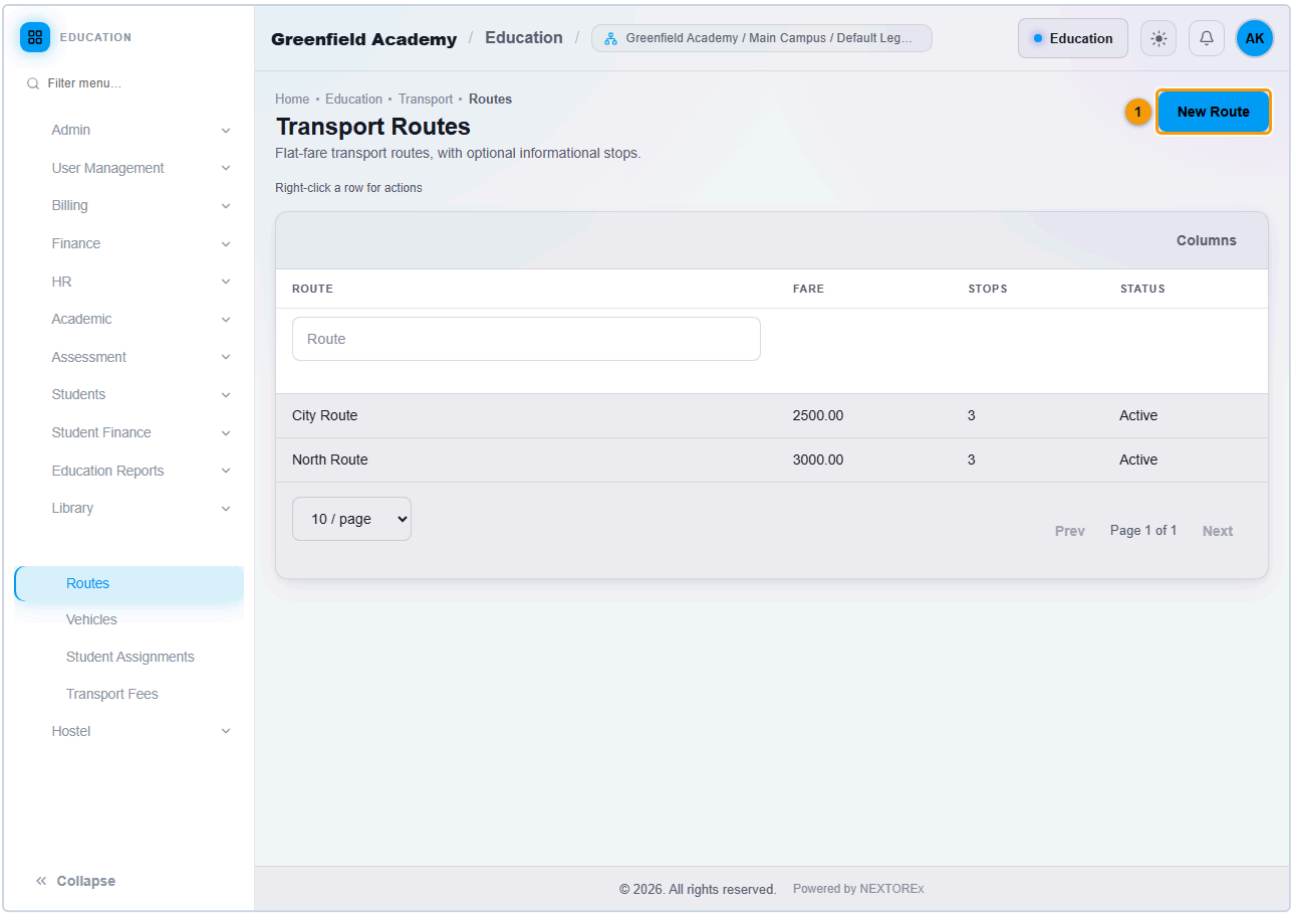
Education Campus. Education Essentials and Education Standard do not include Transport.

Where to find it

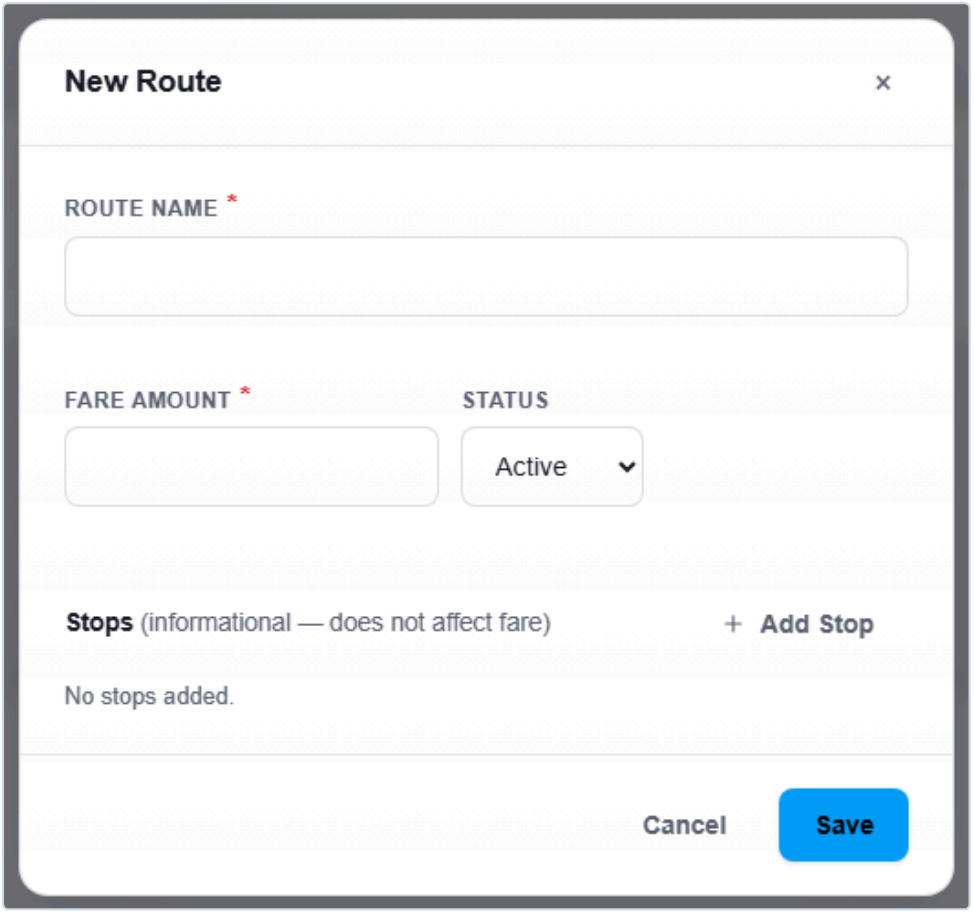
Open **Transport**. It holds **Routes**, **Student Assignments** and **Transport Fees**.

Steps: create a route

1. Open **Transport**, then **Routes**, and click **New Route** (1).
2. Enter the **Route Name** and the **Fare Amount**. This is the flat fare charged every month to each student on the route.
3. Choose the **Status**, **Active** or **Inactive**.
4. Click **Add Stop** to list the stops of the route. Stops are for information only and do not change the fare.
5. Click **Save**.



Each route has a flat monthly fare and a number of stops. New Route (1) adds one.

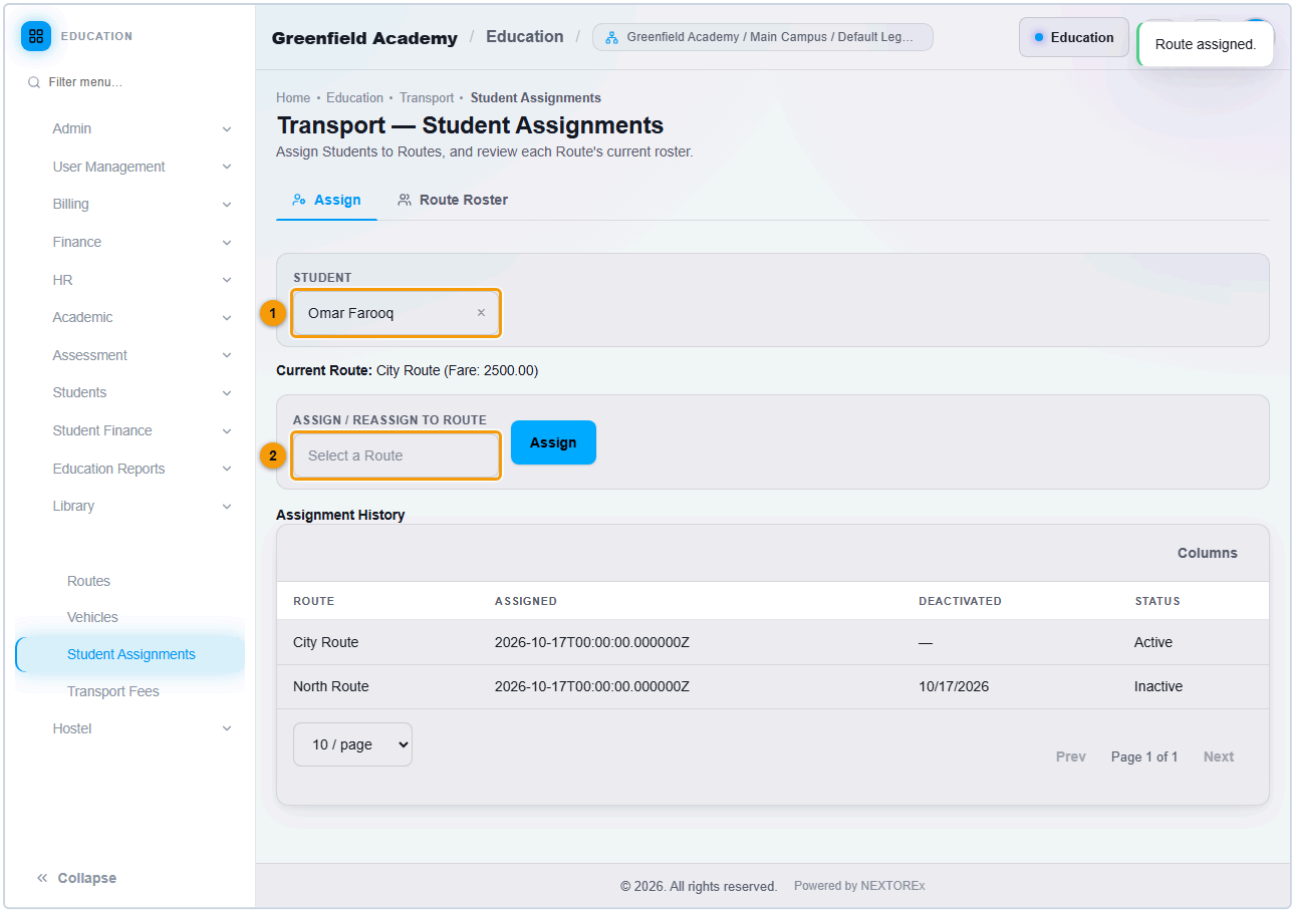


A route has a name, a fare and optional informational stops.

Steps: assign a student to a route

1. Open **Transport**, then **Student Assignments**, on the **Assign** tab.
2. Choose the **Student** (1). The page shows the student's **Current Route** and its fare.
3. Under **Assign / Reassign to Route** (2), choose the route and click **Assign**.

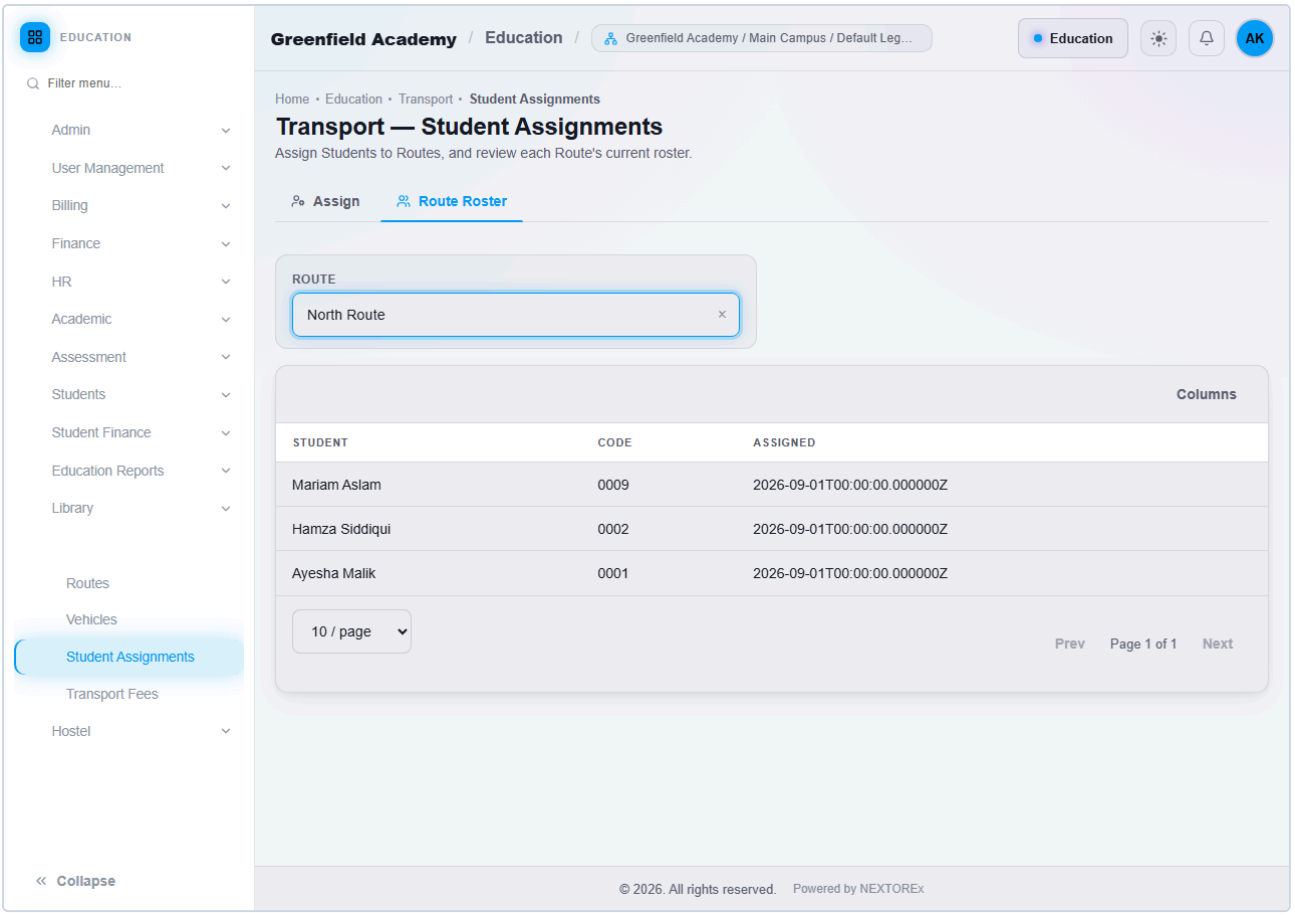
To move a student to another route, choose the new route and click **Assign** again. The old assignment is closed automatically.



After a student is moved, Assignment History shows the earlier route as Inactive.

Assignment History lists every route the student has had, when it started, when it ended and whether it is still **Active**.

To see who travels on a route, open the **Route Roster** tab and choose the route.

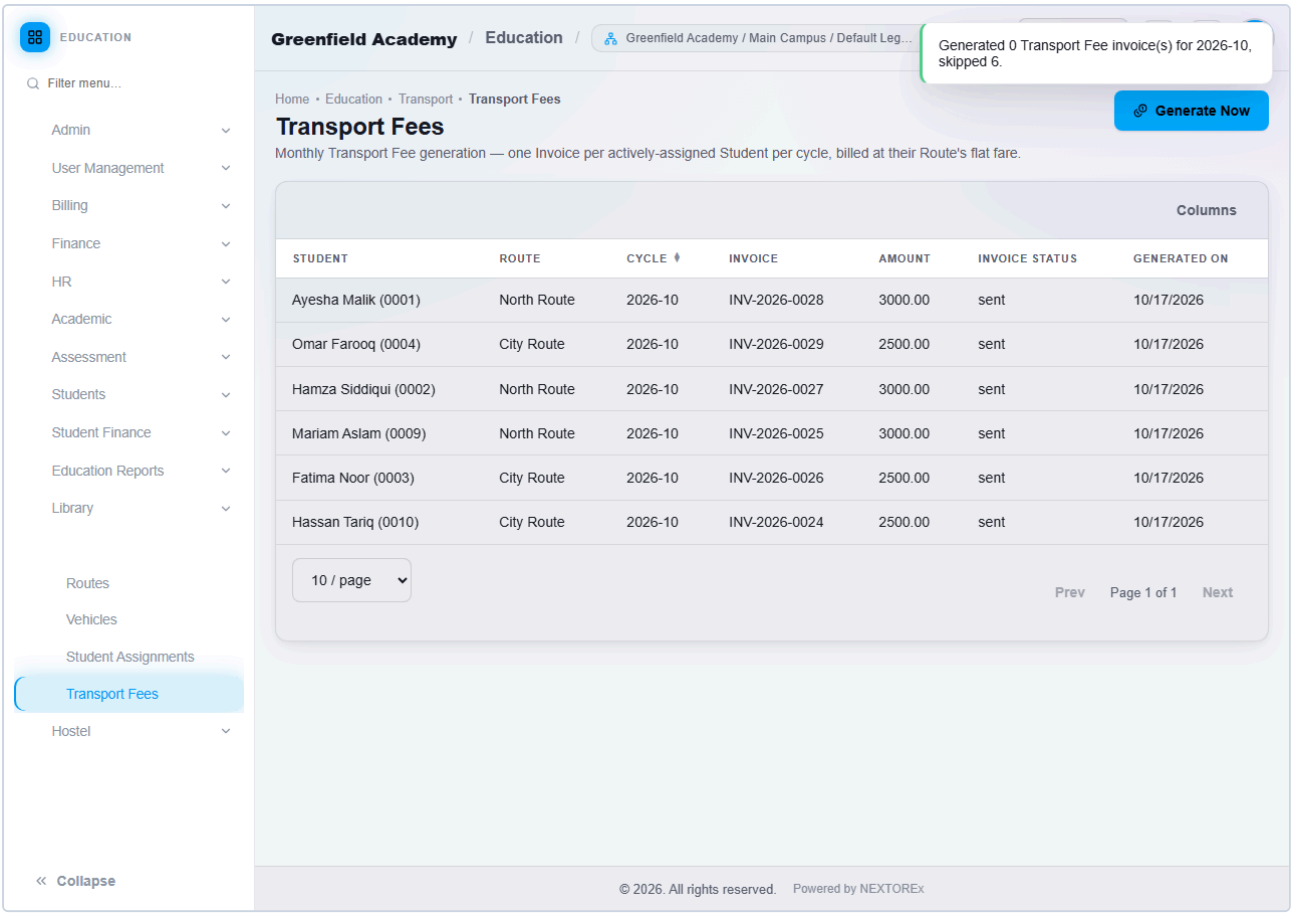


The students currently on one route.

Steps: generate the monthly transport fees

1. Open **Transport**, then **Transport Fees**.
2. Click **Generate Now**.

NEXTOREx creates one invoice for every student who is currently on a route, for the current month, at that route's flat fare. A message tells you how many invoices were created and how many were skipped. The table lists each student, route, month, invoice, amount, invoice status and the date it was generated.



Clicking Generate Now a second time reports that nothing new was created: Generated 0 and skipped 6.

Duplicates are prevented

A student is billed **once per month**. If you click **Generate Now** again for the same month, students who already have that month's invoice are skipped. It is safe to run it more than once.

What happens next

The transport invoice appears in the student's **Fee History**, next to tuition. Record the payment with a receipt. See Student payments and fee statement.

Important rules

- A student is on one route at a time.
- The fare is a flat monthly amount for the route.
- Only students who are currently assigned to a route are billed.
- A student is never billed twice for the same month.

Common mistakes

- Expecting stops to change the fare. They are informational.
- Expecting the fare to be charged before **Generate Now** is run.
- Assigning a student to a route after the month was generated and expecting an invoice immediately. Run **Generate Now** again. Only the new student receives an invoice.

Related guides

- Hostel
- Student payments and fee statement
- Education reports and dashboard

Hostel

Set up hostel buildings and rooms with a capacity and a monthly fee, assign students to rooms, and generate monthly hostel fees without duplicates.

Plan: Education Campus

What this does

Hostel lets you record your buildings and rooms, assign students to rooms, stop a room from taking more students than it holds, and bill the room's monthly fee to each student who lives in it.

Who can use it

Staff whose role includes the Hostel permissions.

Which package includes it

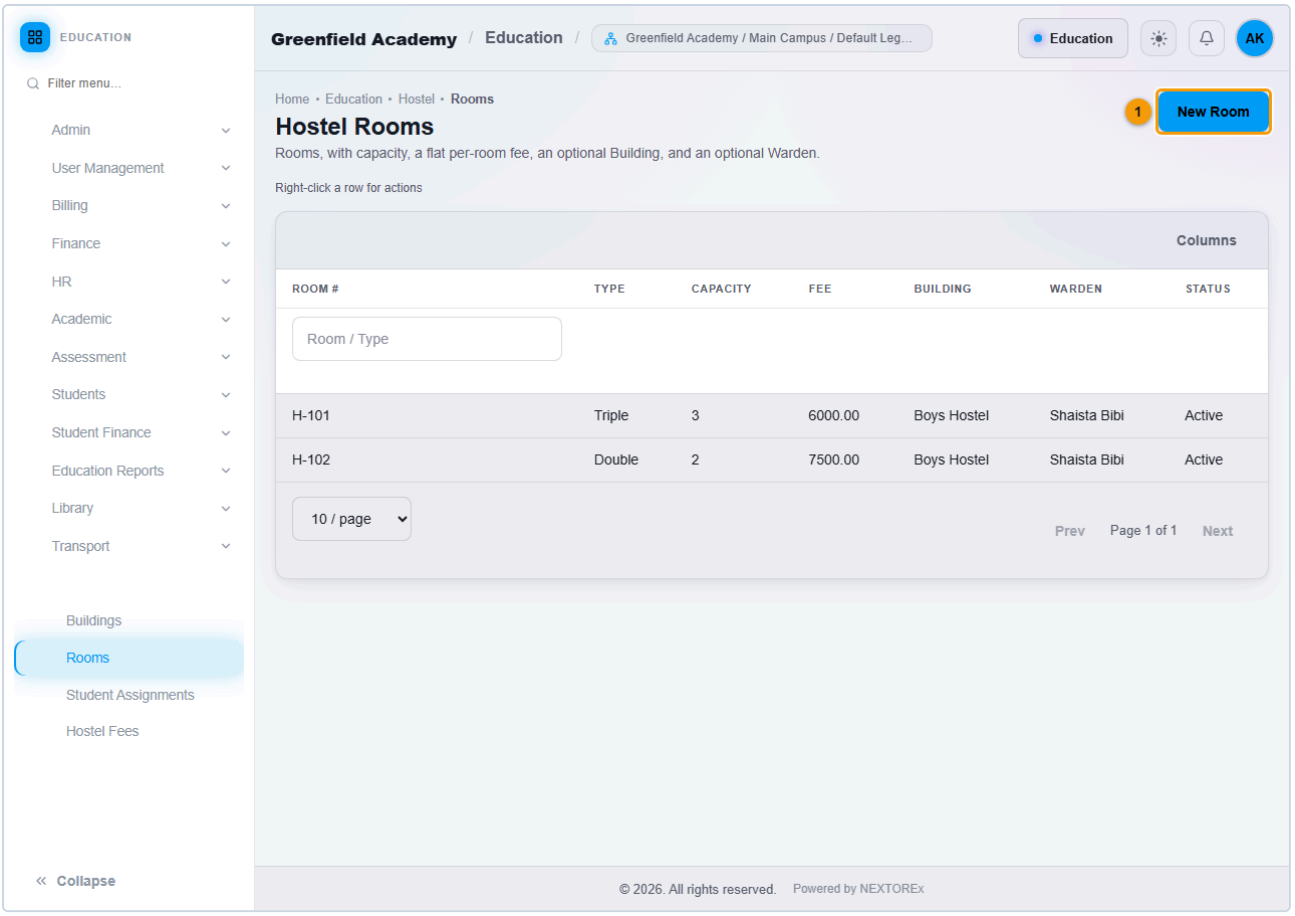
Education Campus. Education Essentials and Education Standard do not include Hostel.

Where to find it

Open **Hostel**. It holds **Buildings**, **Rooms**, **Student Assignments** and **Hostel Fees**.

Steps: create buildings and rooms

1. Open **Hostel**, then **Buildings**. Click **New Building**, enter the **Building Name** and click **Save**. Buildings are optional but help you group rooms.
2. Open **Hostel**, then **Rooms**, and click **New Room** (1).
3. Enter the **Room Number** and, if you want, the **Room Type**, for example Double.
4. Enter the **Capacity**. This is the number of students the room can hold.
5. Enter the **Fee Amount**. This is the flat monthly fee for each student in the room.
6. Choose a **Building** and a **Warden** if you want. A warden is a staff member whose employment type is Warden.
7. Click **Save**.



Each room has a capacity, a flat fee, a building and a warden. New Room (1) adds one.

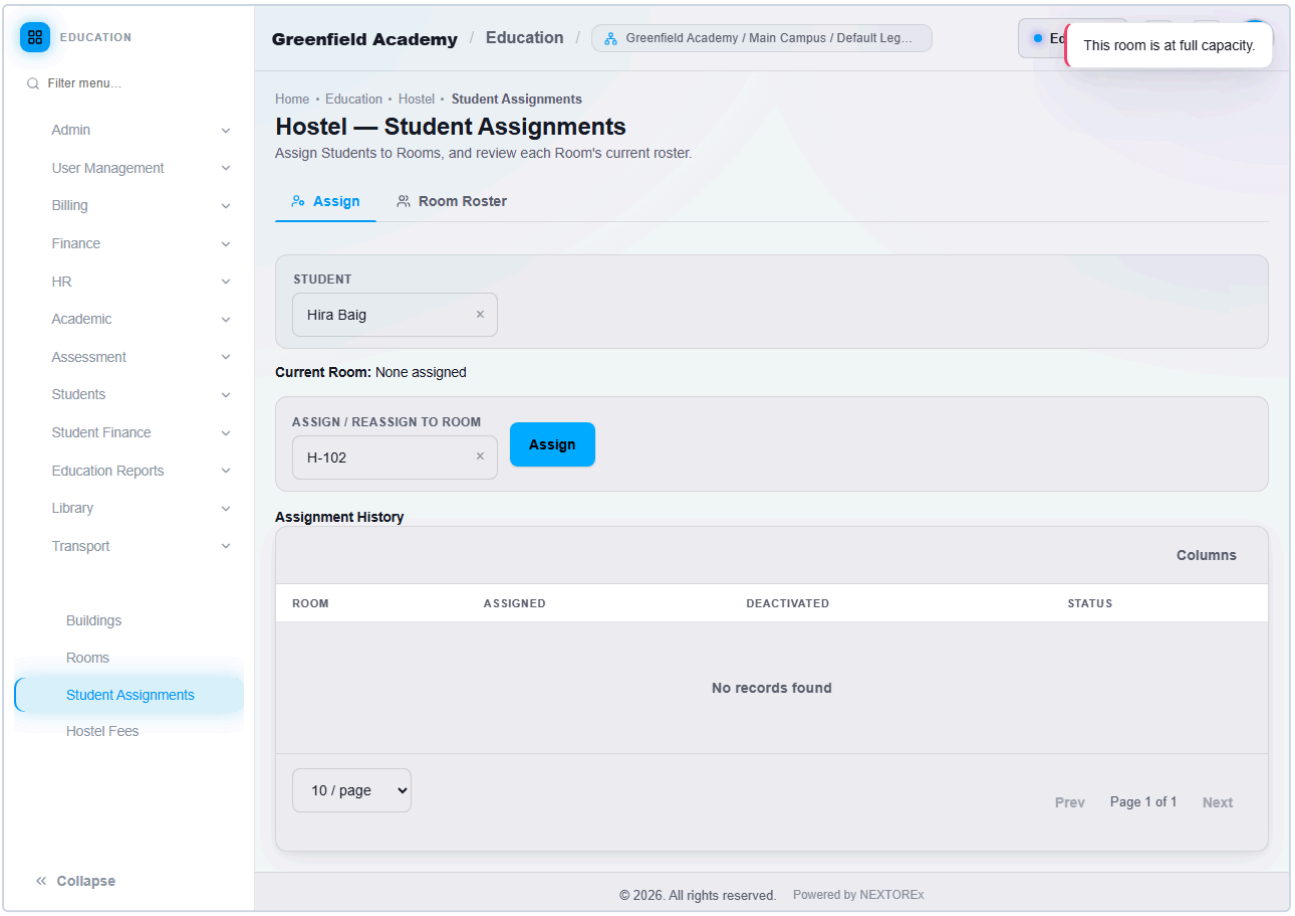
Steps: assign a student to a room

1. Open **Hostel**, then **Student Assignments**, on the **Assign** tab.
2. Choose the **Student**. The page shows the student's current room.
3. Choose the room under **Assign / Reassign to Room** and click **Assign**.

To move a student, choose the new room and click **Assign** again. The earlier assignment is kept in the student's history.

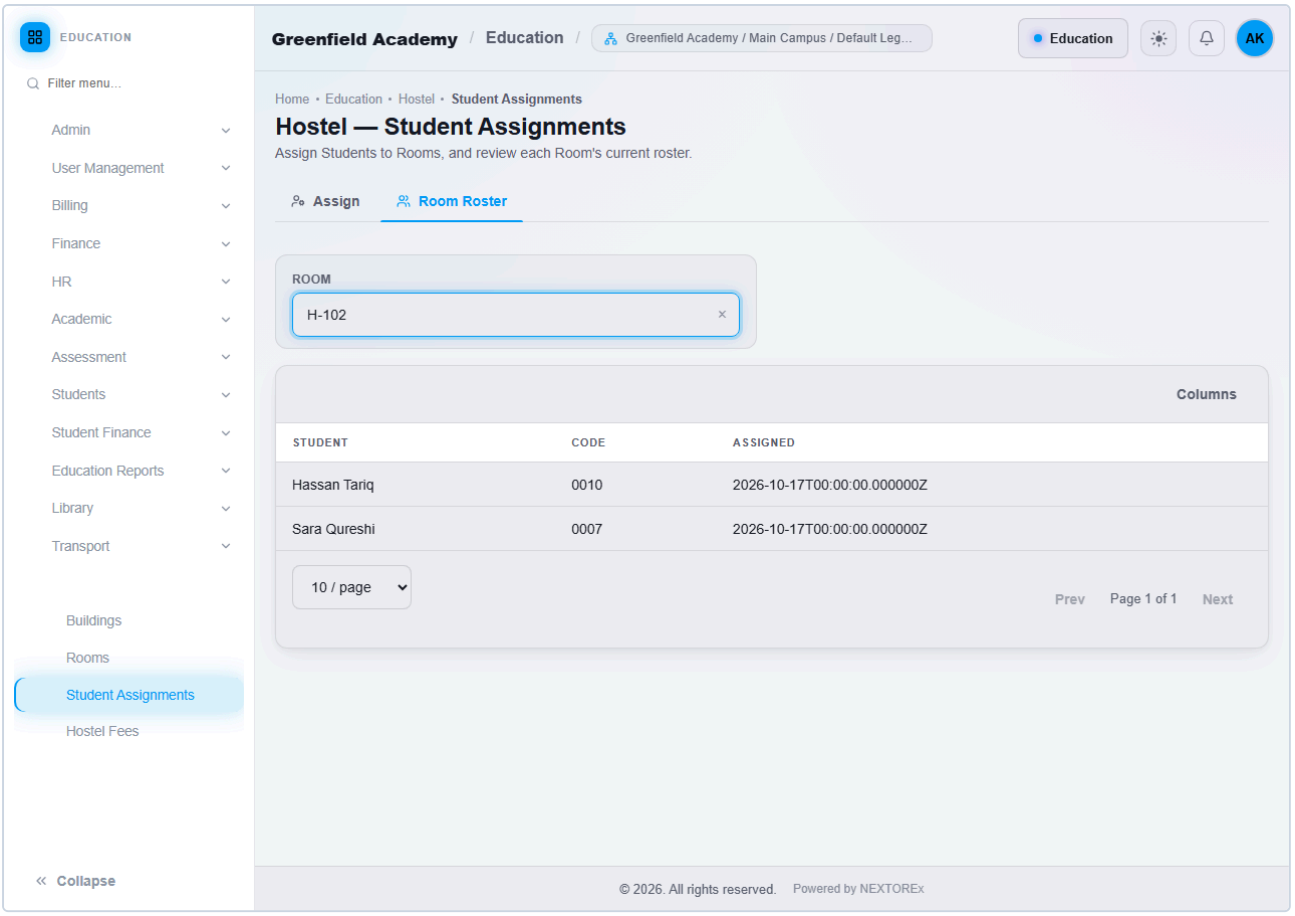
A full room refuses another student

When a room is full, NEXTOREx shows **This room is at full capacity.** and the student is not assigned. Choose another room.



A room with two places and two students refuses the third.

Open the **Room Roster** tab and choose a room to see who is in it.

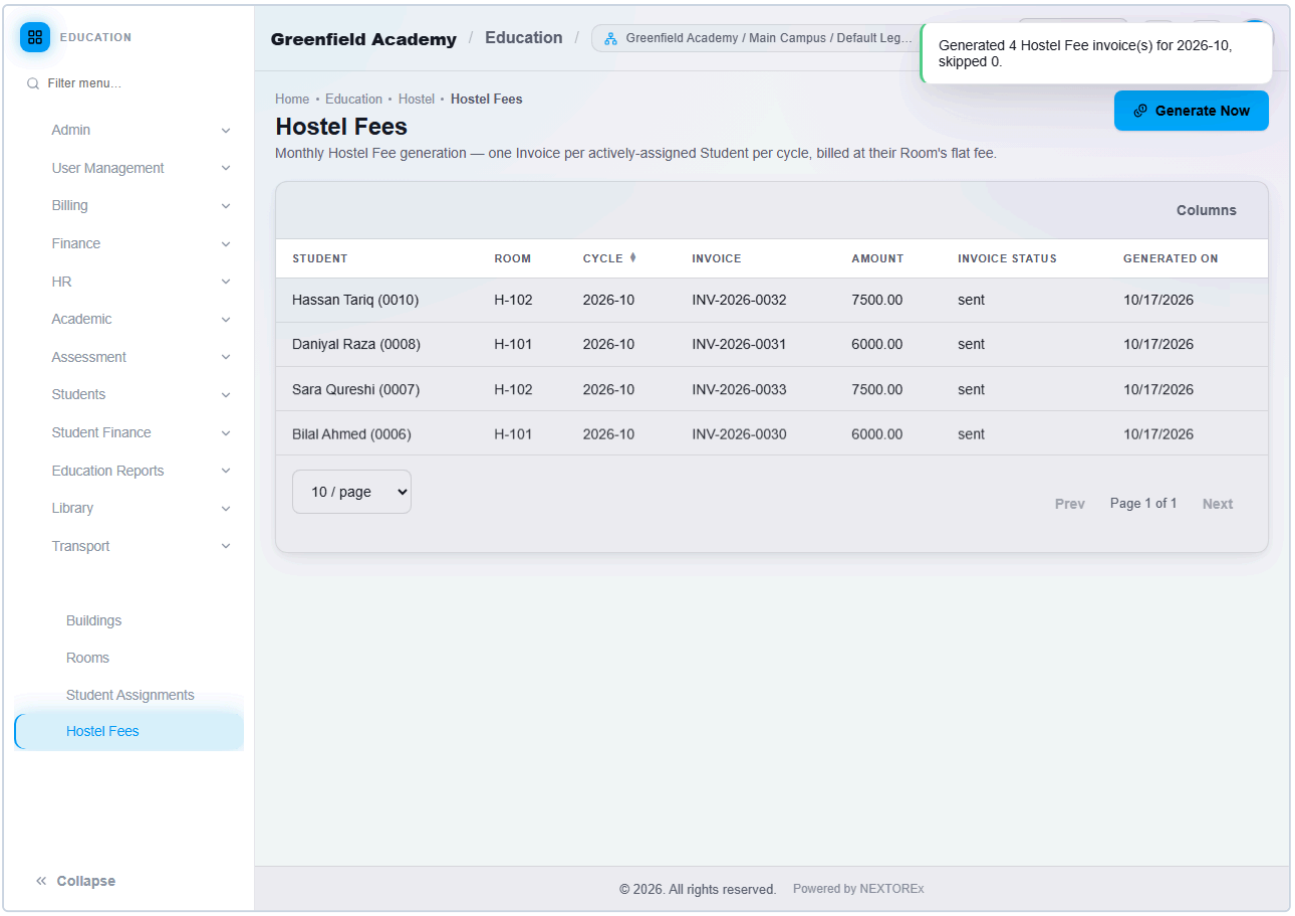


The students currently in one room.

Steps: generate the monthly hostel fees

1. Open **Hostel**, then **Hostel Fees**.
2. Click **Generate Now**.

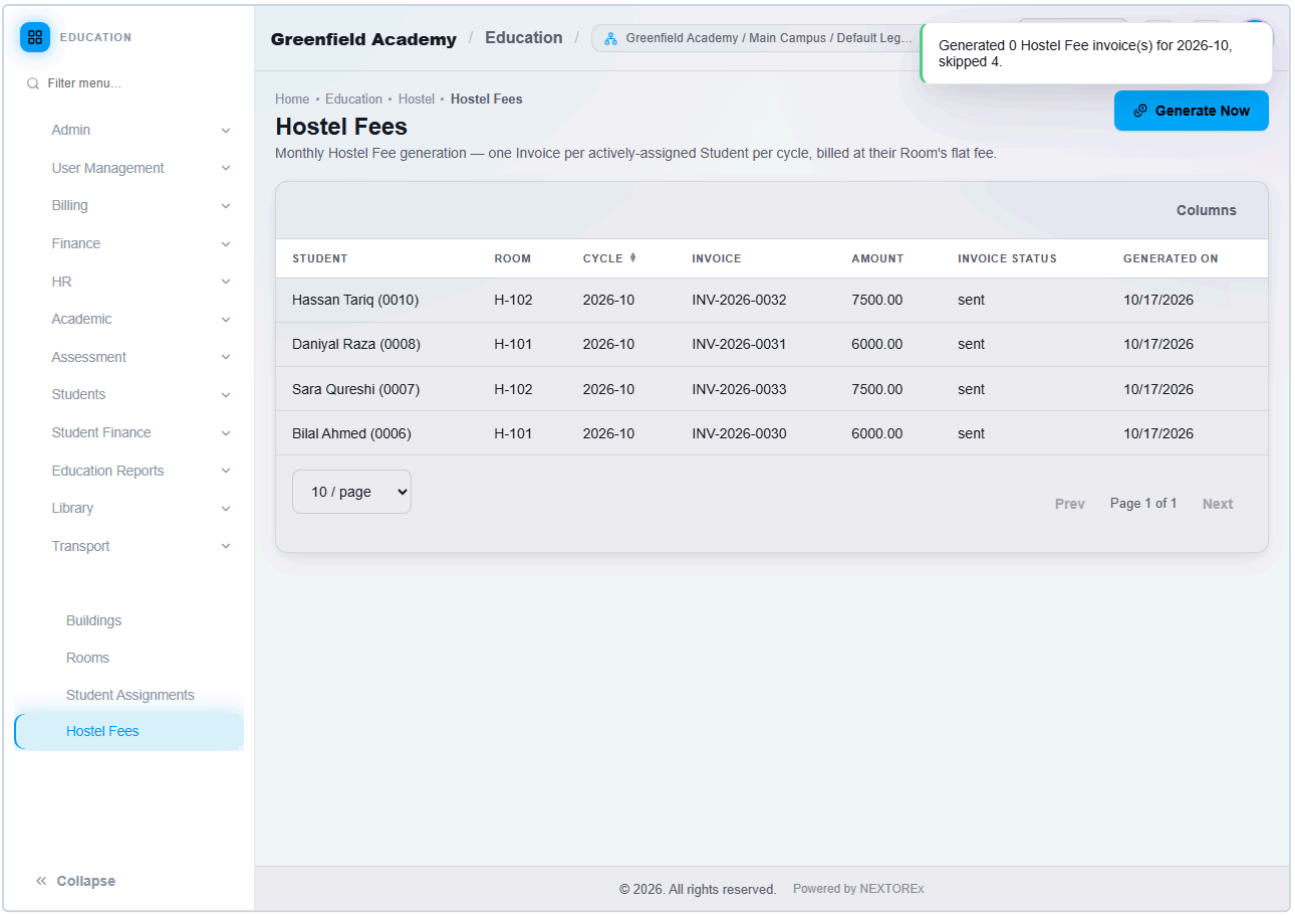
NEXTOREx creates one invoice for every student who is currently in a room, for the current month, at that room's flat fee. A message tells you how many invoices were created. The table lists the student, room, month, invoice, amount, invoice status and the date.



One invoice for each student who lives in a room.

Duplicates are prevented

A student is billed once per month. If you click **Generate Now** again, the message reports that nothing new was created and how many students were skipped.



The second run creates no invoices: Generated 0, skipped 4.

What happens next

The hostel invoice appears in the student's **Fee History**. Record the payment with a receipt. See Student payments and fee statement.

Important rules

- A room never holds more students than its capacity.
- A student is in one room at a time.
- The room's fee is flat and charged monthly to each student in it.
- A student is never billed twice for the same month.

Common mistakes

- Assigning a student to a room after the month was generated and expecting an invoice at once. Click **Generate Now** again. Only the new student receives an invoice.
- Forgetting to assign the student to a room before generating the fees.
- Setting the capacity too low. Edit the room to change it.

Related guides

- Transport

- Student payments and fee statement
- Education reports and dashboard

Library

Keep a catalog of books and copies, issue copies to students, record returns, and set a fine rule for overdue books.

Plan: Education Standard and above

What this does

The **Library** keeps your **book catalog** and the physical **copies** of each book. You issue a copy to a student, record when it comes back, and, if you want, charge a fine for books that are overdue.

Who can use it

Staff whose role includes the Library permissions. Students can see their own library loans.

Which package includes it

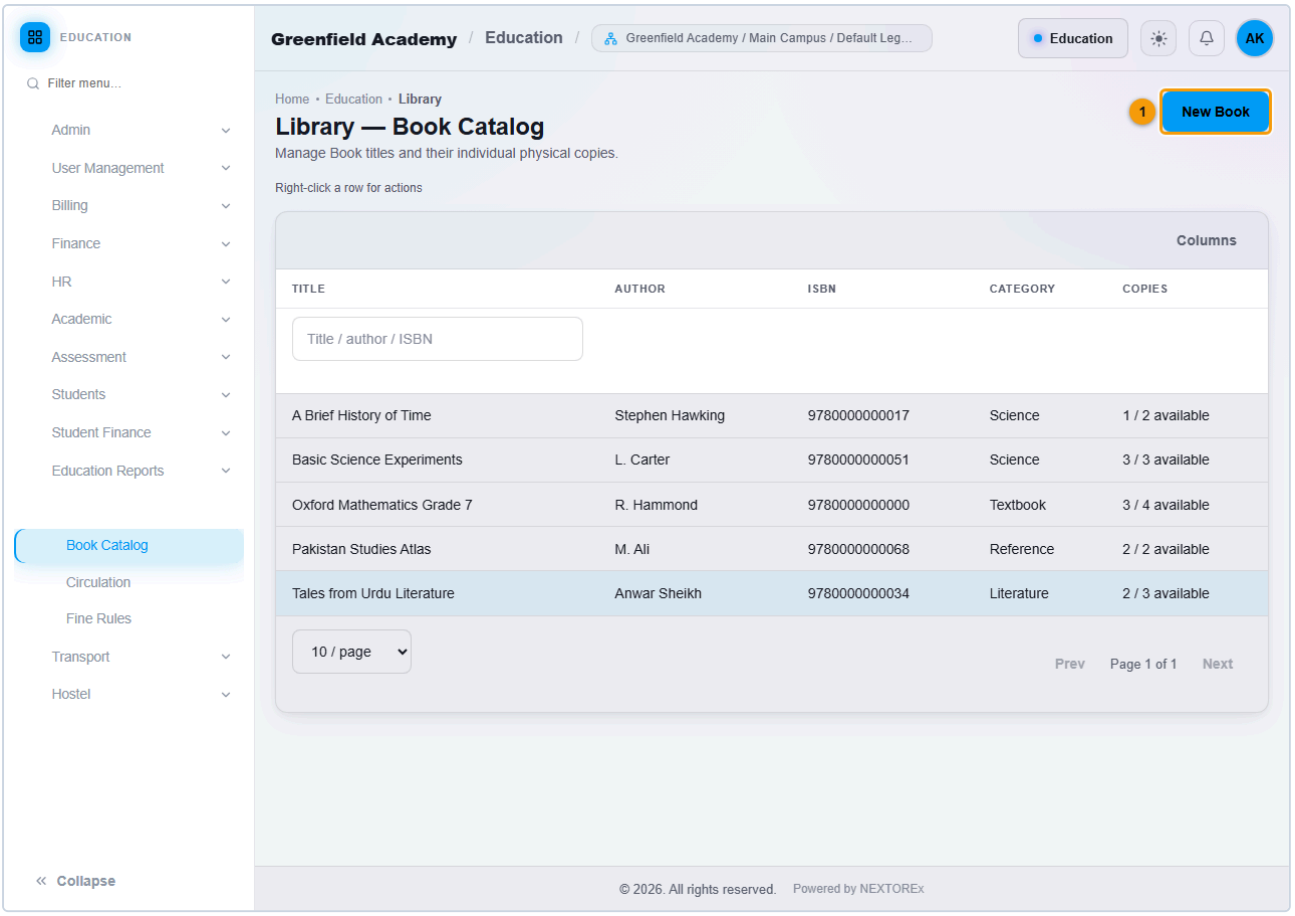
Education Standard and Education Campus. Education Essentials does not include the Library.

Where to find it

Open **Library**. It holds **Book Catalog**, **Circulation** and **Fine Rules**.

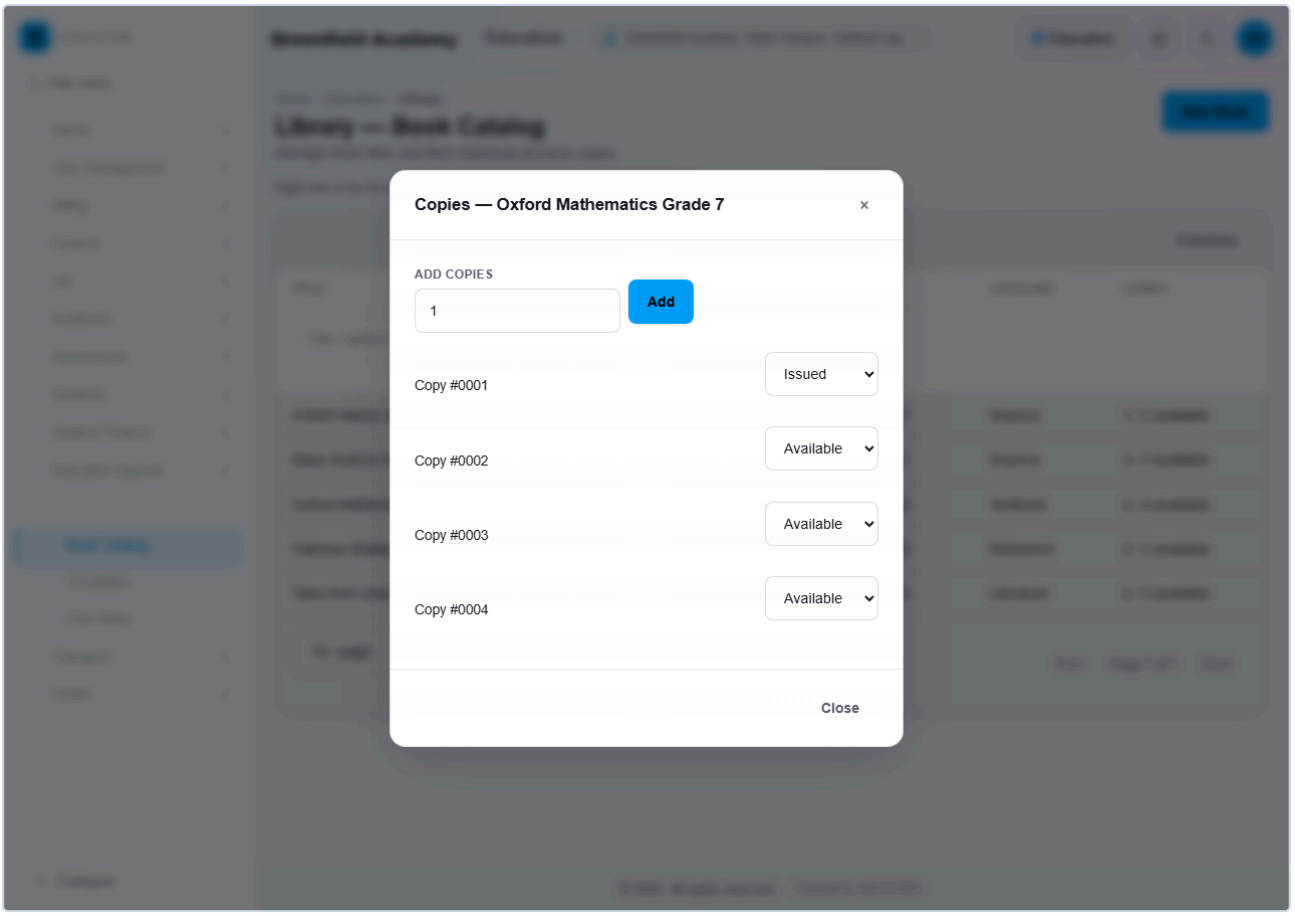
Steps: add books and copies

1. Open **Library**, then **Book Catalog**, and click **New Book** (1).
2. Enter the **Title**. The author, ISBN and category are optional. You can enter how many copies the library owns.
3. Click **Save**.



Each book shows how many copies are available, for example 3 / 4 available. New Book (1) adds a title.

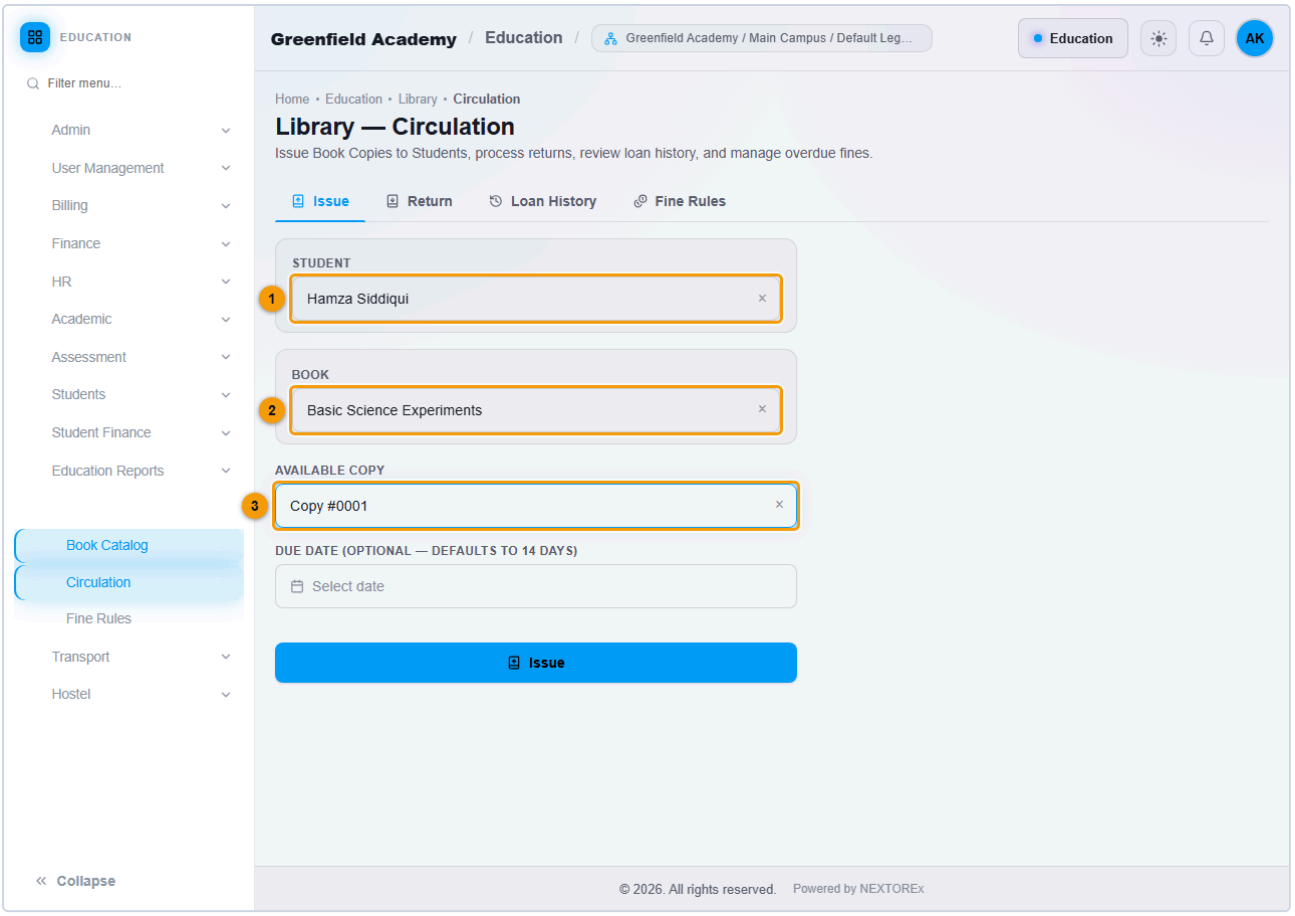
To manage the copies of a book, right-click the book and choose **Manage Copies**. Each copy has a number and a status: **Available**, **Issued**, **Lost** or **Damaged**. Click **Add** to add more copies.



The copies of one book and the status of each.

Steps: issue a book

1. Open **Library**, then **Circulation**, on the **Issue** tab.
2. Choose the **Student** (1) and the **Book** (2).
3. Choose an **Available Copy** (3). Only copies that are on the shelf are listed.
4. Choose a **Due Date**. It is optional and defaults to 14 days from today.
5. Click **Issue**.

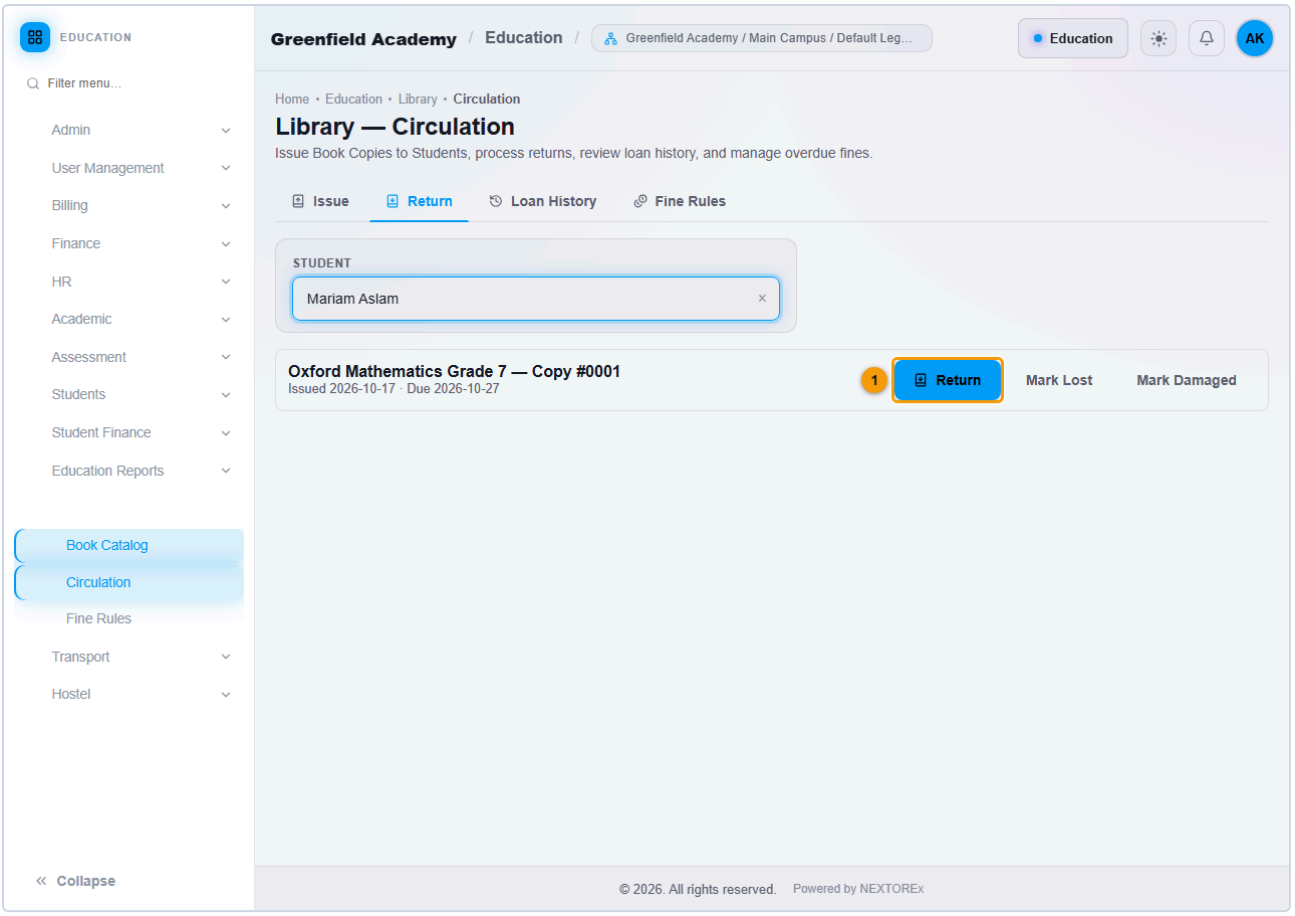


Choose the student (1), the book (2) and an available copy (3).

The message **Book Copy issued.** confirms it. The copy now shows as **Issued** and the book's available count goes down.

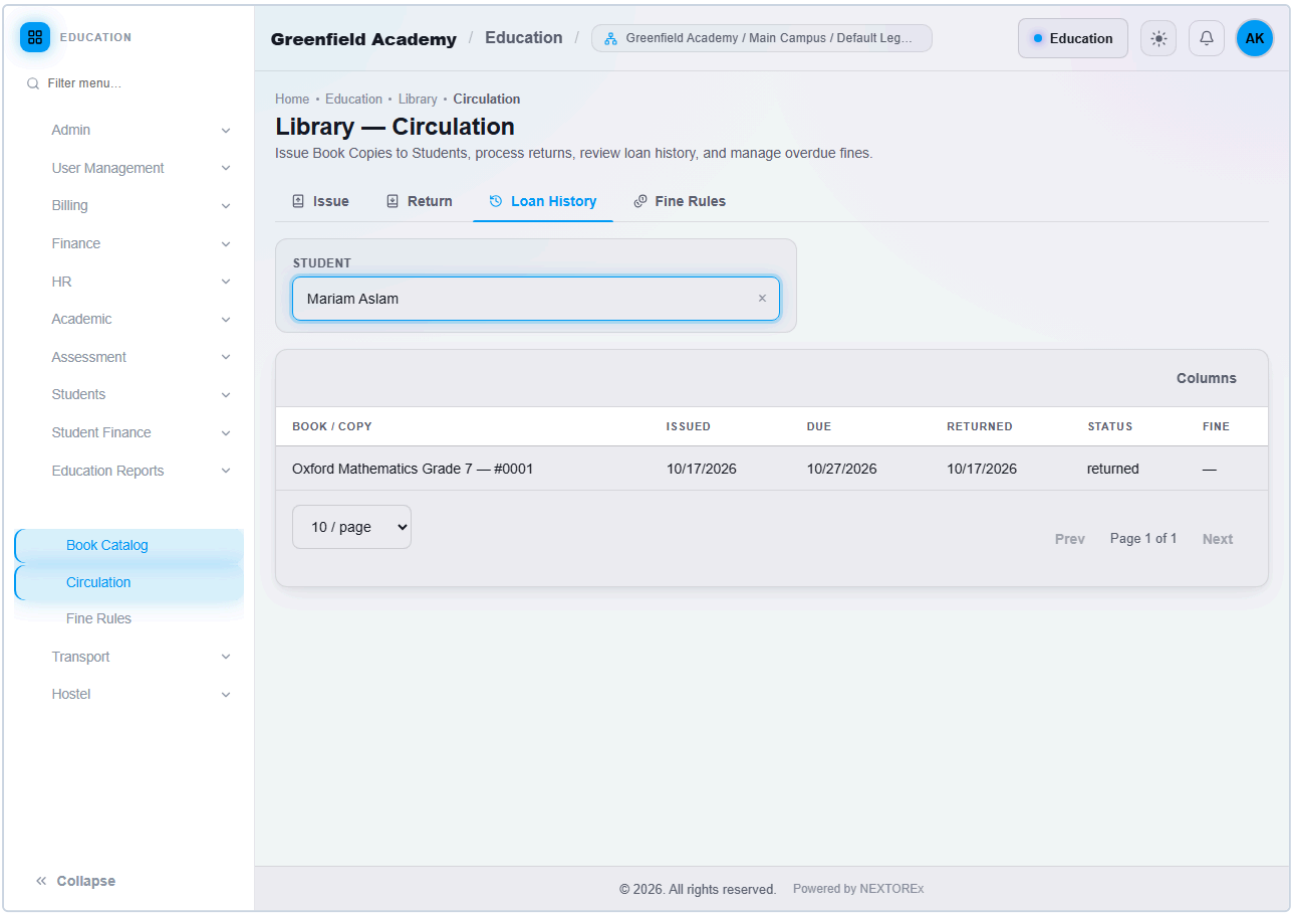
Steps: return a book

1. Open the **Return** tab and choose the **Student**.
2. The student's open loans are listed with the book, copy, issue date and due date.
3. Click **Return**. If the book was lost or damaged, click **Mark Lost** or **Mark Damaged** instead.



A student's open loan with Return, Mark Lost and Mark Damaged.

A returned copy becomes **Available** again. The **Loan History** tab shows every loan of a student with its issue date, due date, return date, status and any fine.

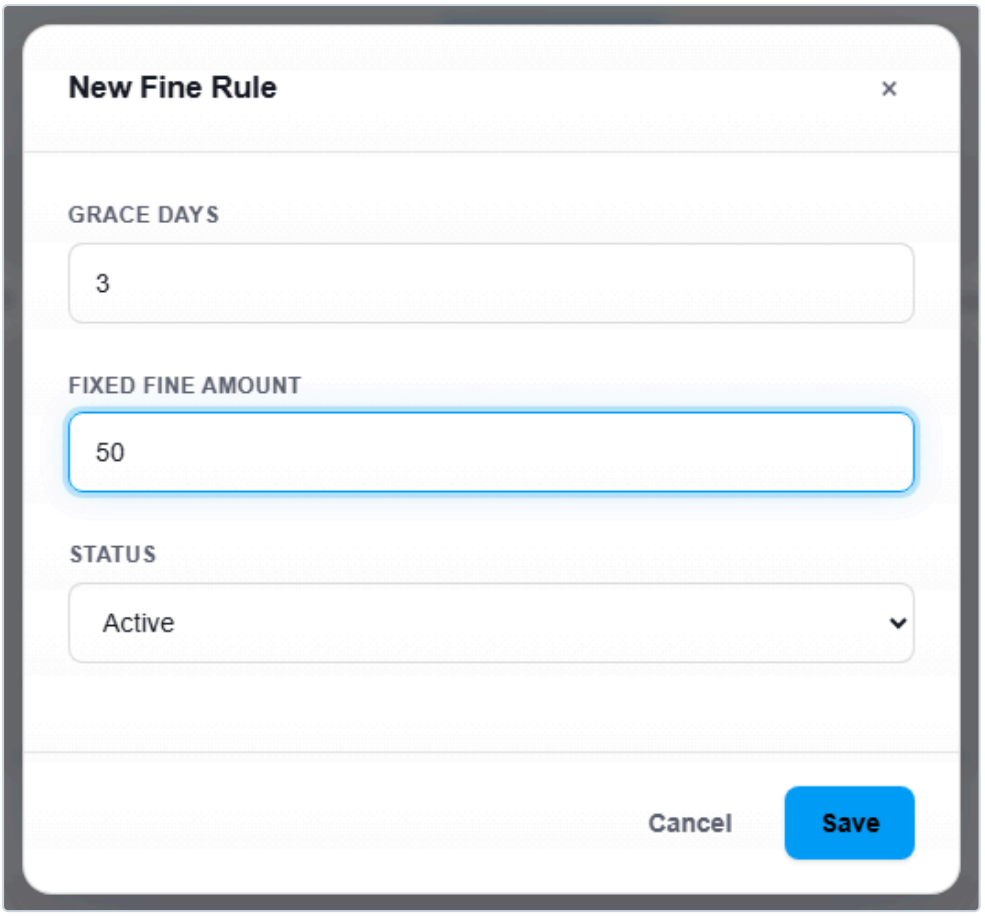


Loans of one student, with the status and any fine.

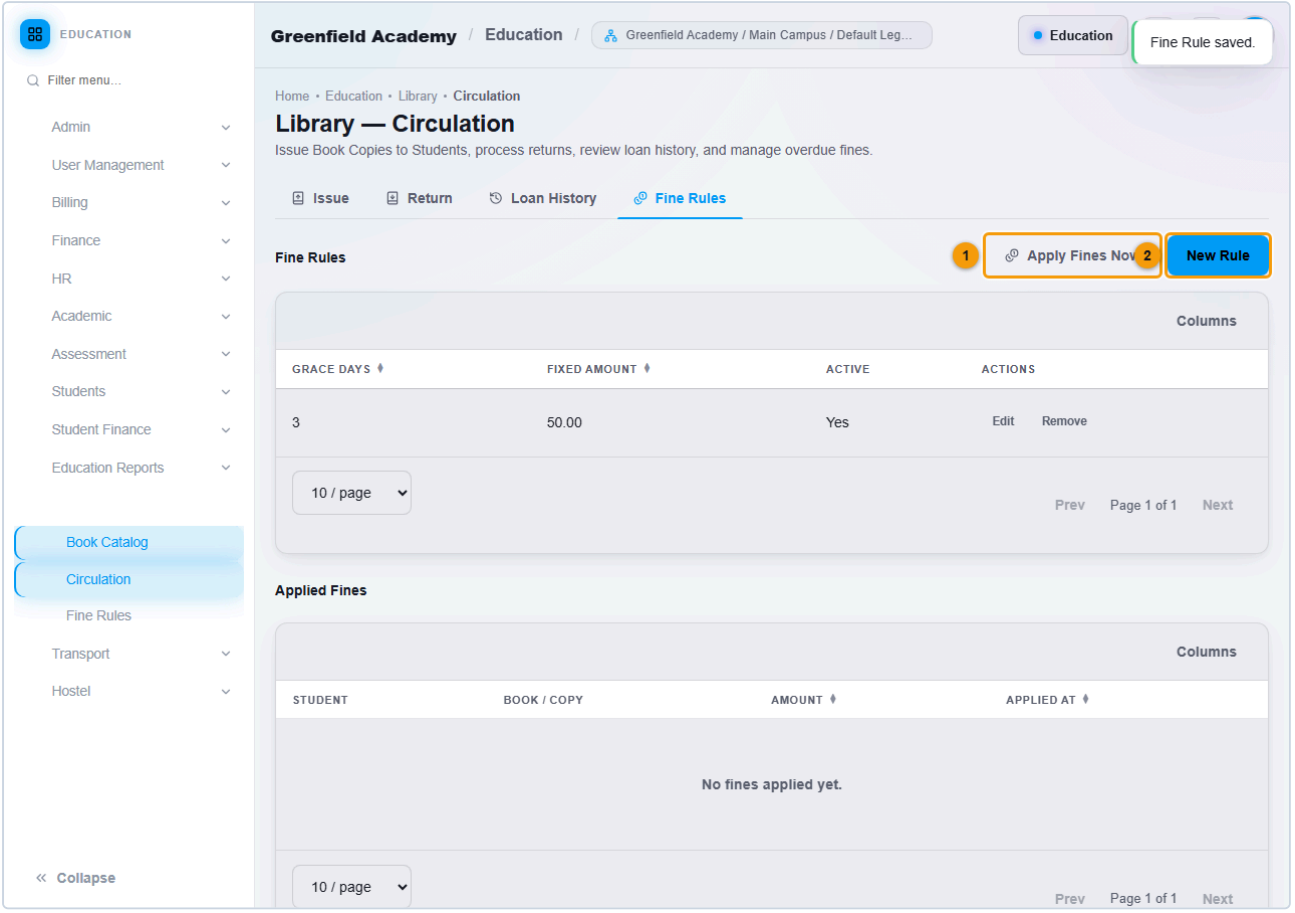
Overdue fines

NEXTOREx can charge a fine for a book that is not returned on time.

1. Open **Circulation**, then the **Fine Rules** tab, and click **New Rule**.
2. Enter the **Grace Days**, the number of days after the due date before a fine applies, and the **Fixed Fine Amount**.
3. Click **Save**.

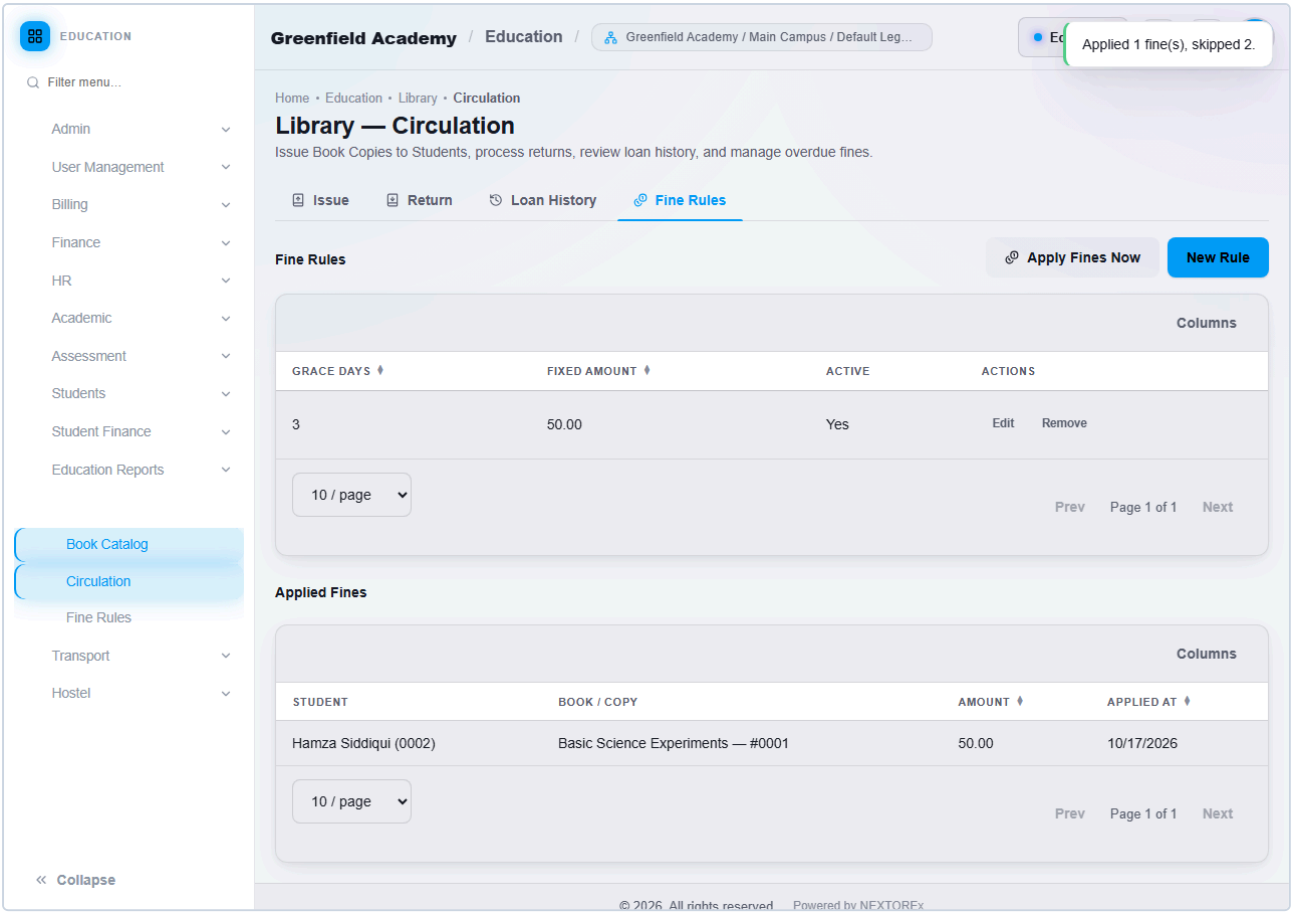


A fine rule has a grace period and a fixed amount.



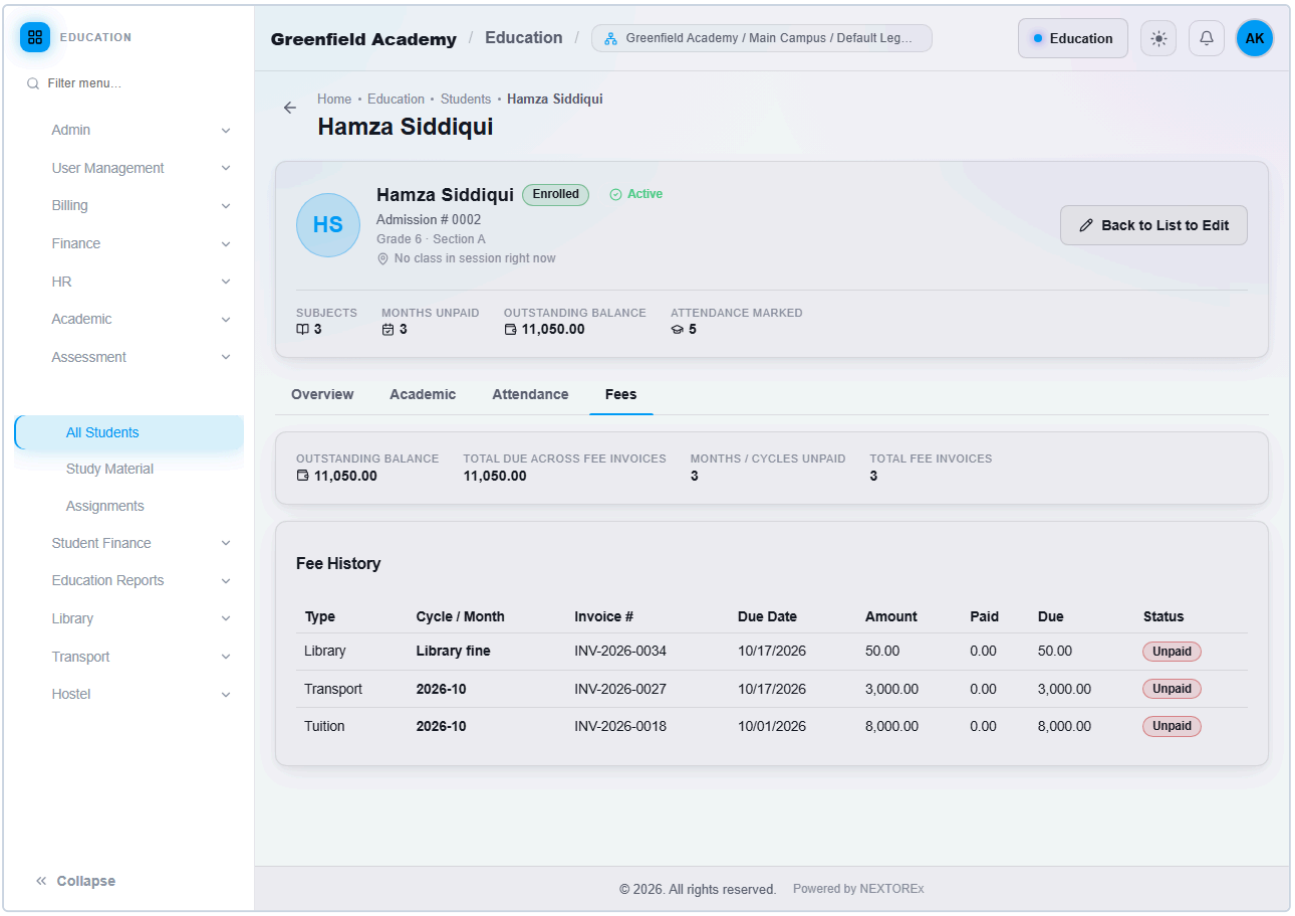
Apply Fines Now (1) charges the fines. New Rule (2) adds a rule.

Click **Apply Fines Now** (1) to charge fines. NEXTOREx also runs the same check once a day. For every loan that is still out and is overdue by more than the grace days, it creates **one fine invoice** for the student, described as *Library Fine*, with the book title and the date it became overdue. A loan is fined **only once**. A message such as **Applied 1 fine(s), skipped 2.** tells you what happened.



The Applied Fines list shows each fine with the student, book and amount.

The fine is added to the student's fees. It appears in **Fee History** as a **Library** charge and is paid like any other fee.



The library fine appears beside tuition and transport.

Important rules

- A copy can be issued to one student at a time.
- A fine needs an active fine rule. Without a rule no fine is charged.
- A fine is a fixed amount, charged once per overdue loan, not a daily amount.
- A loan that has been returned is not fined.
- Fines are for books still out. Mark a book **Lost** or **Damaged** to record those cases.

Common mistakes

- Expecting fines without creating a fine rule.
- Expecting the fine to grow every day. It is a single fixed amount.
- Issuing a copy that is already issued. Only available copies are offered.

Related guides

- Student payments and fee statement
- Students: admission and management
- Education reports and dashboard

LMS: study material, assignments and grading

Teachers share study material and set assignments for their own Subjects and Sections, students submit work before the due date, and teachers grade it with feedback.

Plan: Education Standard and above

What this does

The learning tools let a teacher post **study material** and **assignments** for a Subject in a Section. Students of that Section see them, upload their work, and see the teacher's **score** and **feedback**. This guide covers only these features: study material, assignments, submissions and grading.

Who can use it

- **Teachers** who have been assigned to a Subject and a Section manage the material and assignments of exactly those pairs.
- **Administrators** whose role allows managing the learning tools can manage them for every Subject and Section.
- **Students** see the material and assignments of their own Section only.

Which package includes it

Education Standard and Education Campus. Education Essentials does not include study material or assignments.

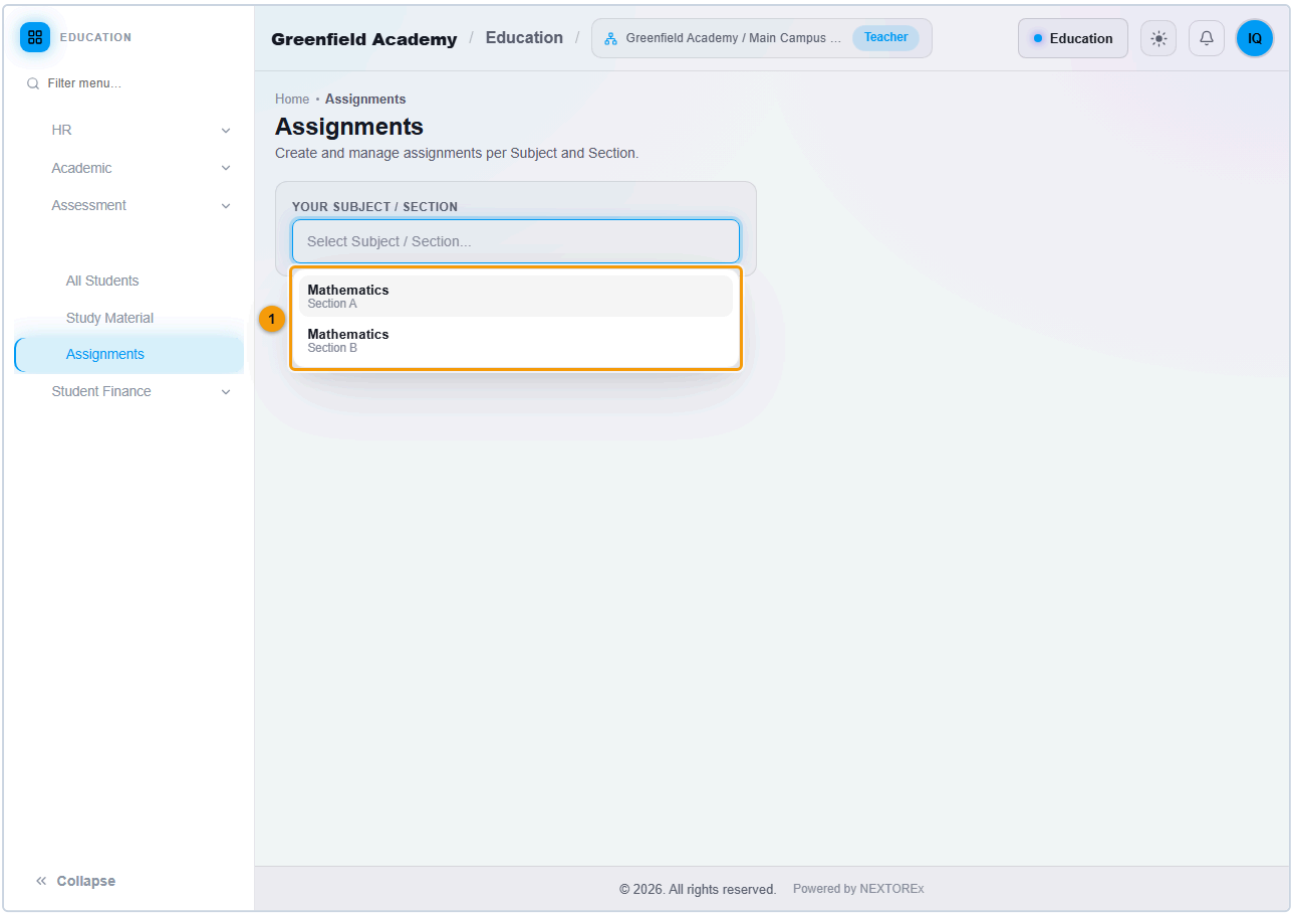
Where to find it

Open **Students**, then **Study Material** or **Assignments**.

How teachers get access

A teacher must first be assigned to the Subject and Section. See Staff and staff attendance.

On **Study Material** and **Assignments**, a teacher sees the box **Your Subject / Section**. It lists **only the Subject and Section pairs the teacher teaches**, for example Mathematics in Section A and in Section B. A teacher does not see, and cannot post for, a Subject they do not teach or a Section they are not assigned to.



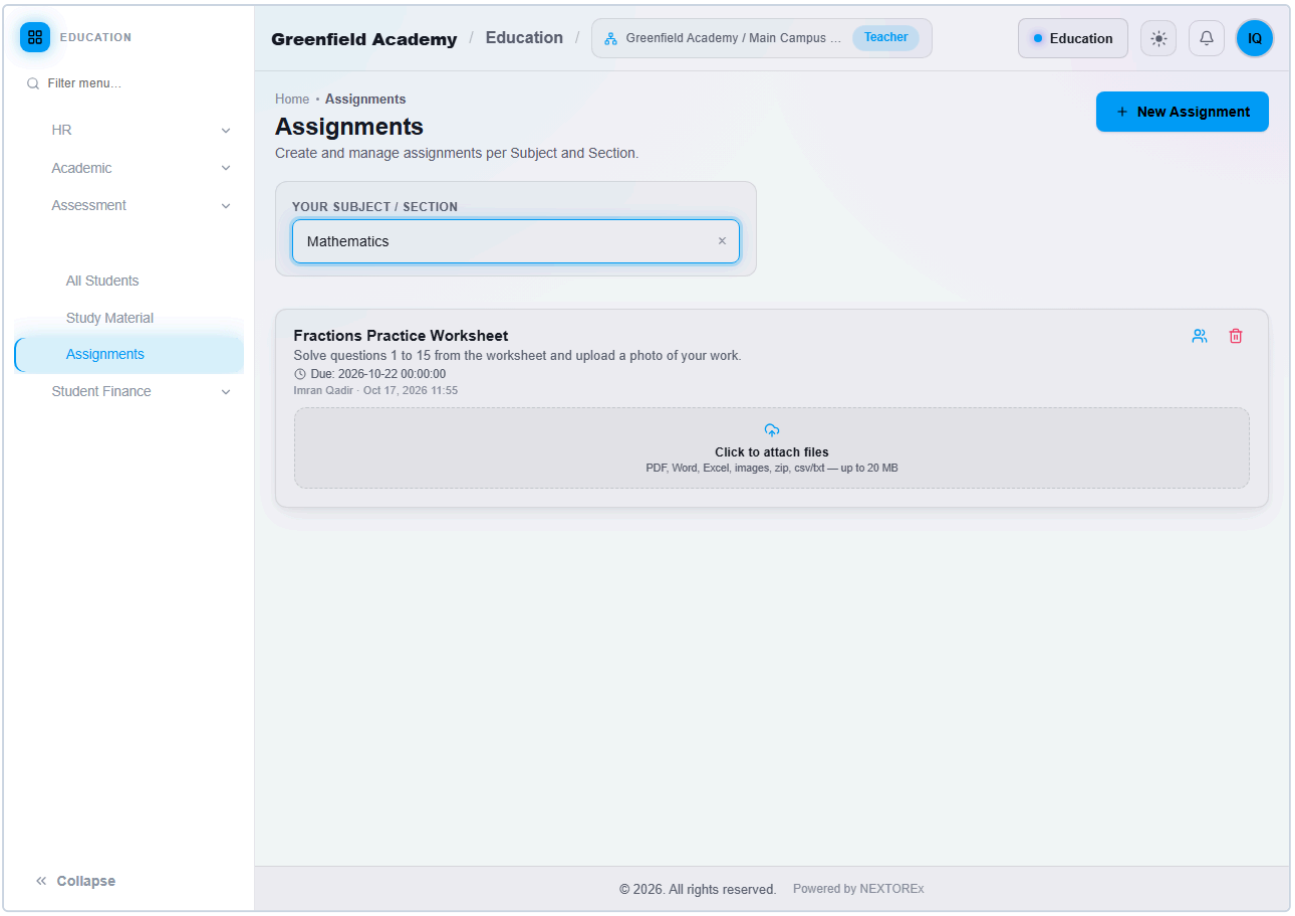
A teacher is offered only the Subject and Section pairs they teach (1).

Steps: post study material

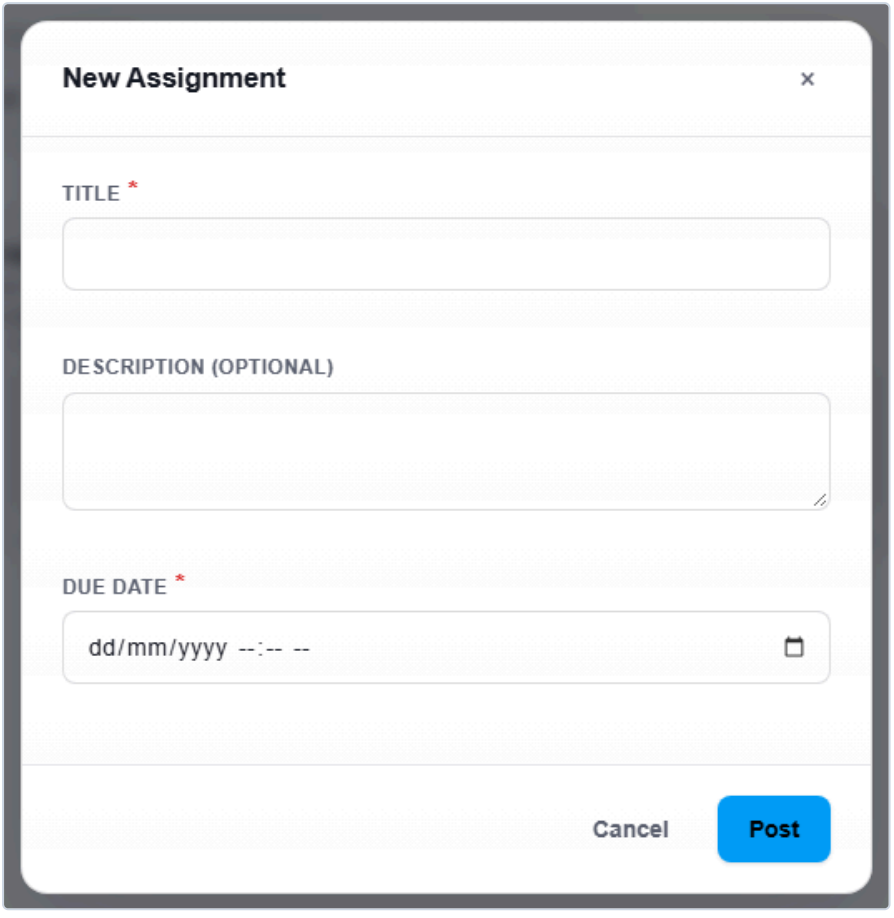
1. Open **Students**, then **Study Material** and choose your **Subject / Section**.
2. Click **New Material** and enter a **Title** and an optional **Description**. Click **Post**.
3. To share a file, click **Click to attach files**. Allowed files are PDF, Word, Excel, images, zip and csv/txt, up to 20 MB.

Steps: set an assignment

1. Open **Students**, then **Assignments** and choose your **Subject / Section**.
2. Click **New Assignment**.
3. Enter the **Title**, an optional **Description** and the **Due Date**.
4. Click **Post**.



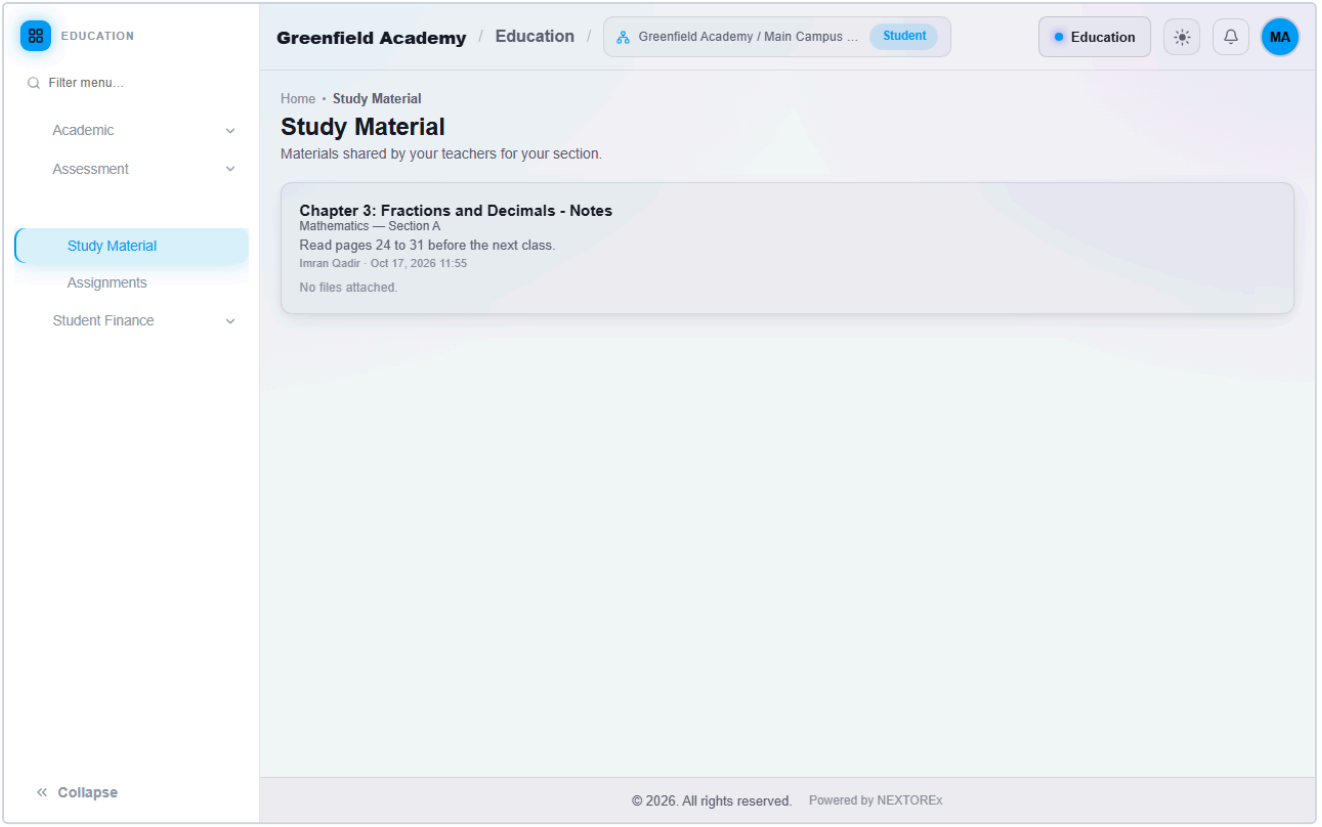
The assignments of one Subject and Section. The people icon opens the submissions.



An assignment has a title, a description and a due date.

What students see and do

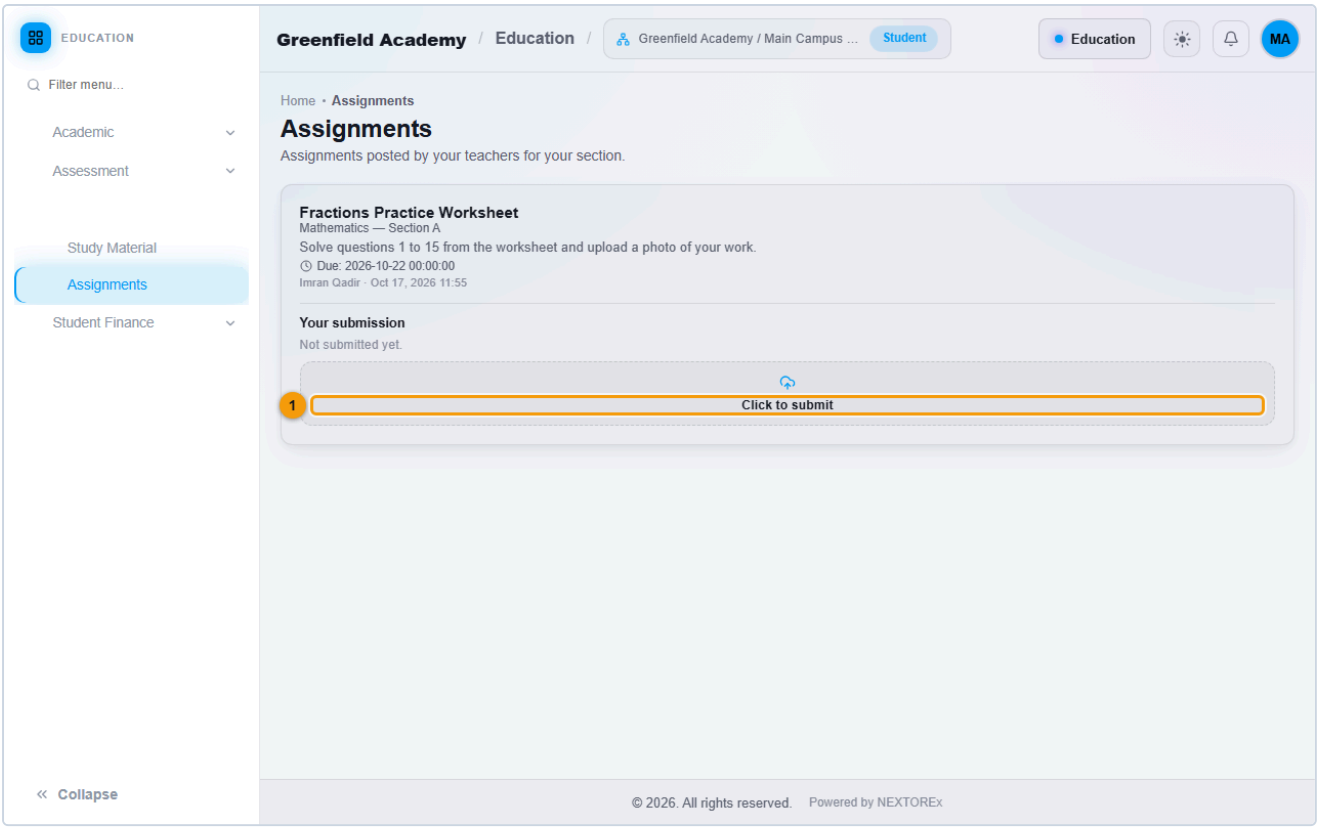
A student opens **Students**, then **Study Material** to read the material of their own Section, and **Assignments** to see what has been set, with the due date.



A student sees the material posted for their own Section.

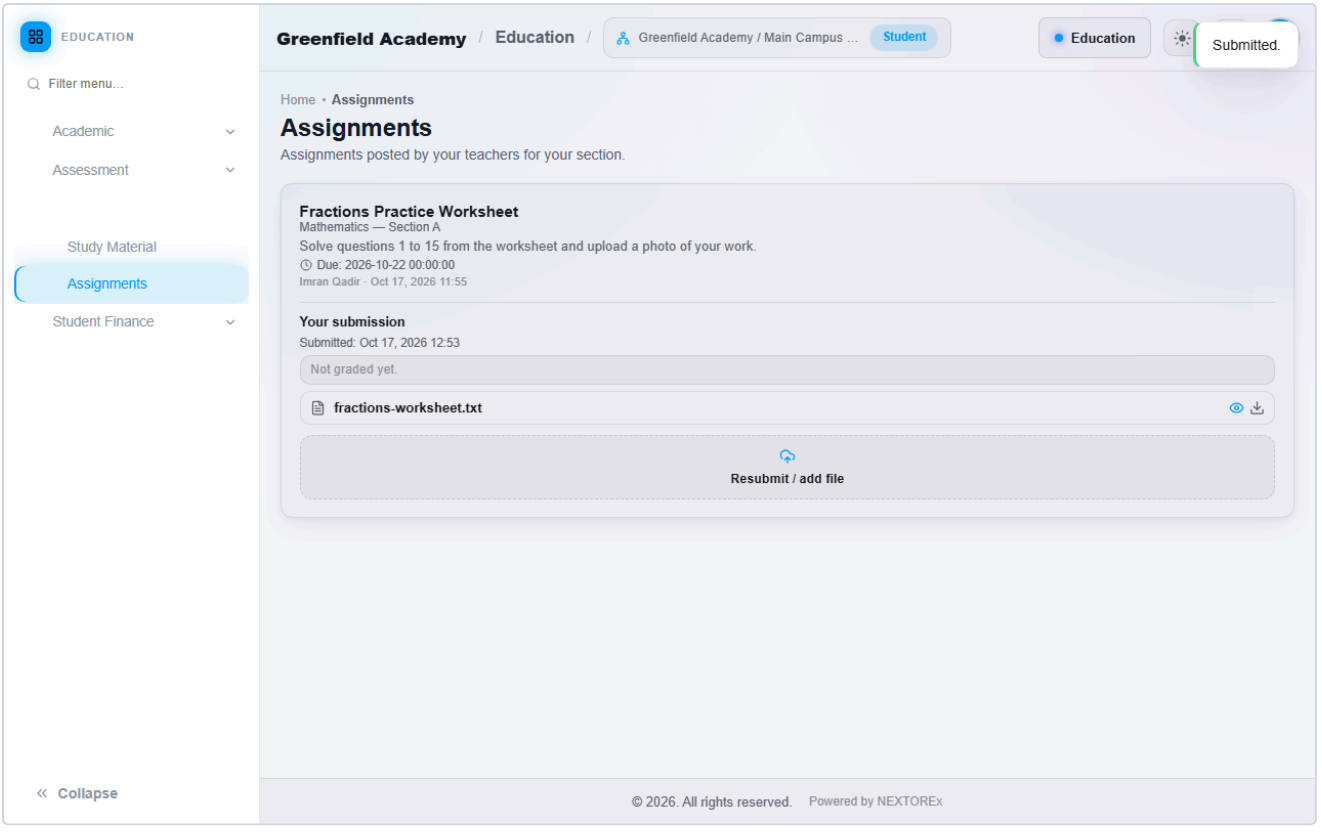
To hand in work:

1. Open **Assignments** and click **Click to submit** (1) under **Your submission**.
2. Choose the file.



The assignment, its due date and the place to submit.

The page then shows **Submitted** with the date and time, **Not graded yet**, and the file name. Until the due date, **Resubmit / add file** lets the student send another file.



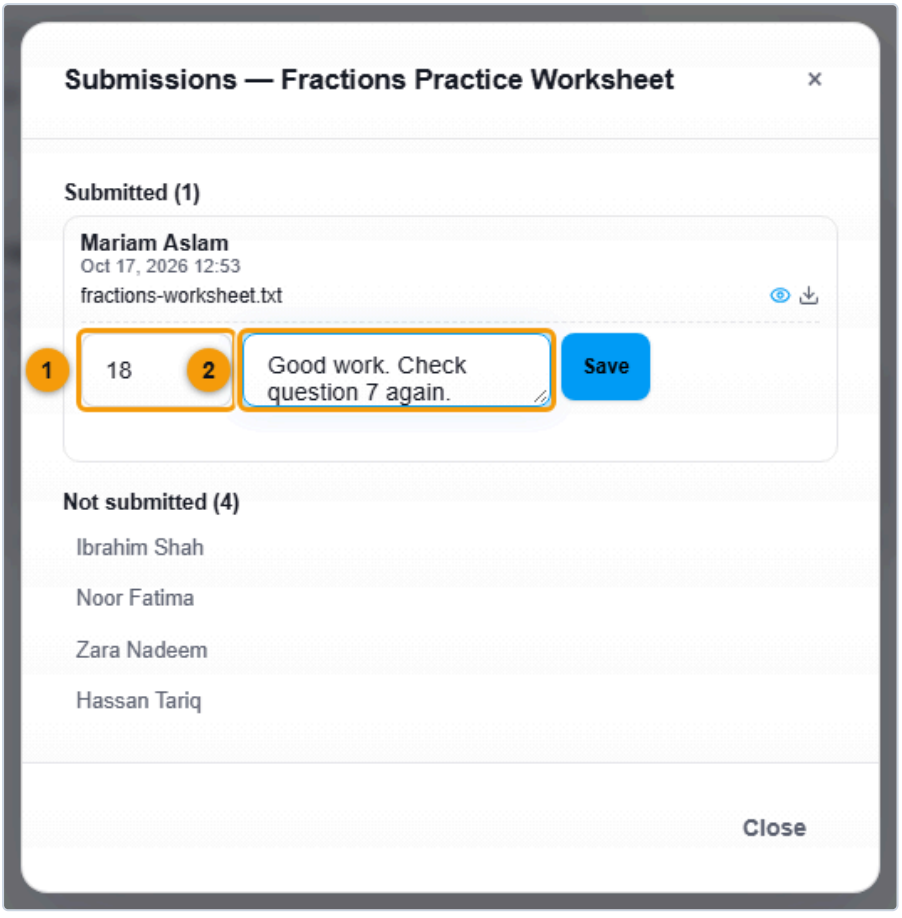
The submission is recorded and waits for grading.

Due dates

- A student can submit **before** the due date and change the submission any time until the due date.
- A first submission **after** the due date is still accepted, and it is marked **late**.
- After the due date, a submission that already exists **cannot be changed**. The student sees that the due date has passed.

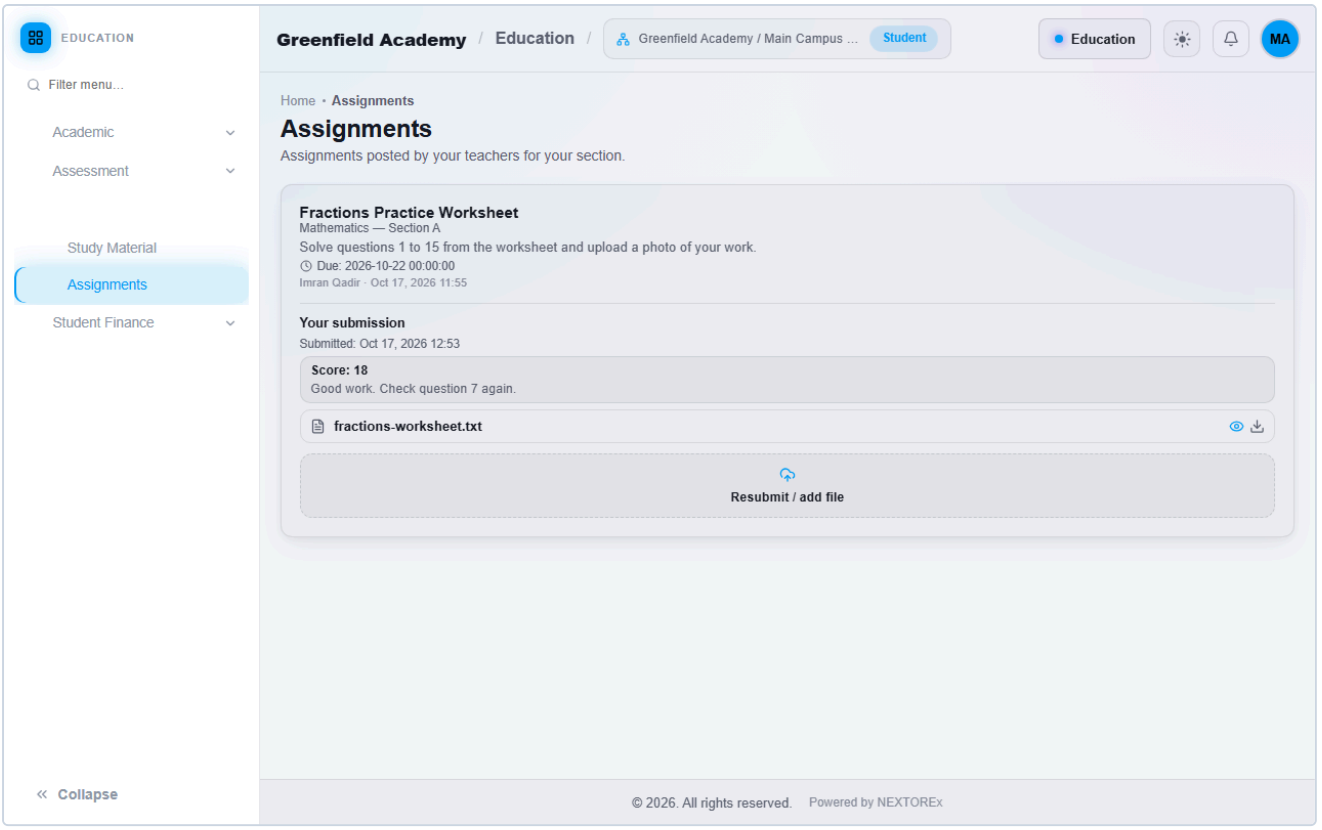
Steps: grade the work

1. Open **Assignments**, choose your **Subject / Section** and click the people icon on the assignment (**View submissions**).
2. The window lists **Submitted** students with their files and **Not submitted** students by name.
3. Enter a **Score** (1) and, if you want, **Feedback** (2) for each student.
4. Click **Save** next to that student. The message **Grade saved.** appears.



Enter a score (1) and feedback (2), then click Save. Students who have not submitted are listed separately.

The student then sees the **Score** and the teacher's feedback beside their submission.



The student sees the score and the feedback.

Important rules

- Teachers manage only the Subjects and Sections assigned to them.
- Students see only their own Section.
- Files can be PDF, Word, Excel, images, zip or csv/txt, up to 20 MB each.
- A late first submission is allowed and flagged. Changes after the due date are refused.

Common mistakes

- Looking for a Subject in the **Your Subject / Section** list that the teacher has not been assigned to. Ask an administrator to assign it.
- Telling students to resubmit after the due date. Resubmitting is refused once the due date has passed.
- Forgetting to click **Save** beside each student's grade.

Related guides

- Staff and staff attendance
- Exams, marks and report cards
- Students: admission and management

Education reports and dashboard

Read the Institution Overview dashboard and the fee, attendance, exam and payroll reports, and understand how a branch and its sub-branches are included.

Plan: Education Essentials and above

What this does

Education has one overview page for the whole institution, the **Institution Overview**, and a set of reports for fees, attendance, exams and payroll. Each report answers a clear question and can be printed.

Who can use it

Staff whose role includes the matching report permission. Each report has its own permission, so you can give the principal the overview and the accounts team the fee reports.

Which package includes it

Report	Package
Institution Overview	Essentials and above
Fee Collection Report (with the Dues only filter)	Essentials and above
Attendance Summary	Essentials and above
Student Attendance Report and Student Fee Statement	Essentials and above
Team Attendance (staff attendance, under **HR**, **Attendance**)	Standard and above
Exam Results Analytics and Report Cards	Standard and above
Payroll Cost Report	Campus

Where to find it

Open **Education Reports**. It holds **Institution Overview**, **Fee Collection Report**, **Exam Results Analytics**, **Attendance Summary** and **Payroll Cost Report**. Your menu shows only the reports your package and role include.

Steps: open a report

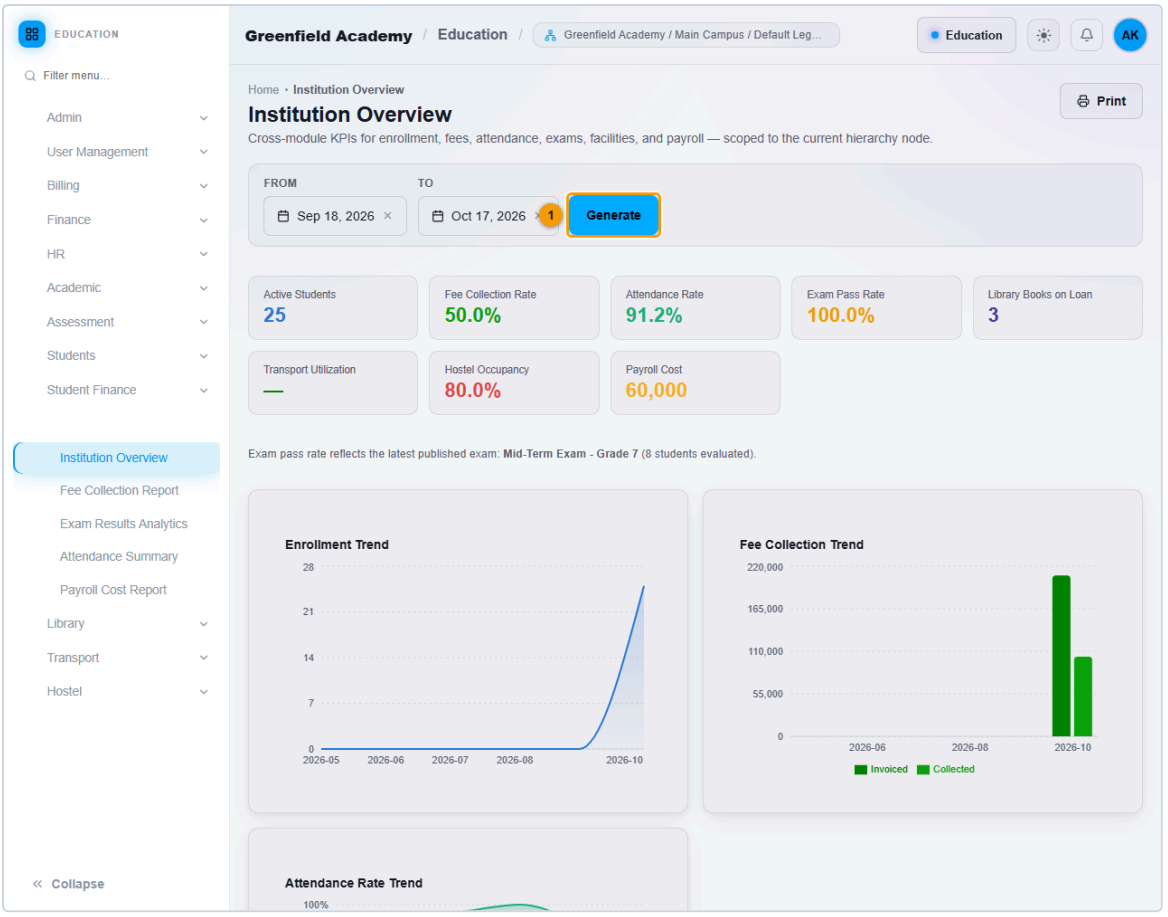
1. Open **Education Reports** and click the report you want.
2. Choose the dates and any filter at the top, for example an **Academic Group**.
3. Click **Generate** or **Filter**. The figures and tables update.
4. Click **Print** to print the report.

Which branch the numbers include

The branch you are working in is shown at the top of the page, next to the name of your institution. Every report and the overview count the **selected branch plus the branches below it that you are allowed to see**. If your account can work in more than one branch, change it with the branch switcher at the top to see another branch. A report never includes data from a branch you have no access to.

Institution Overview

The overview is the Education dashboard. Choose the **From** and **To** dates and click **Generate** (1).



Key figures for students, fees, attendance, exams, facilities and payroll, with three trends.

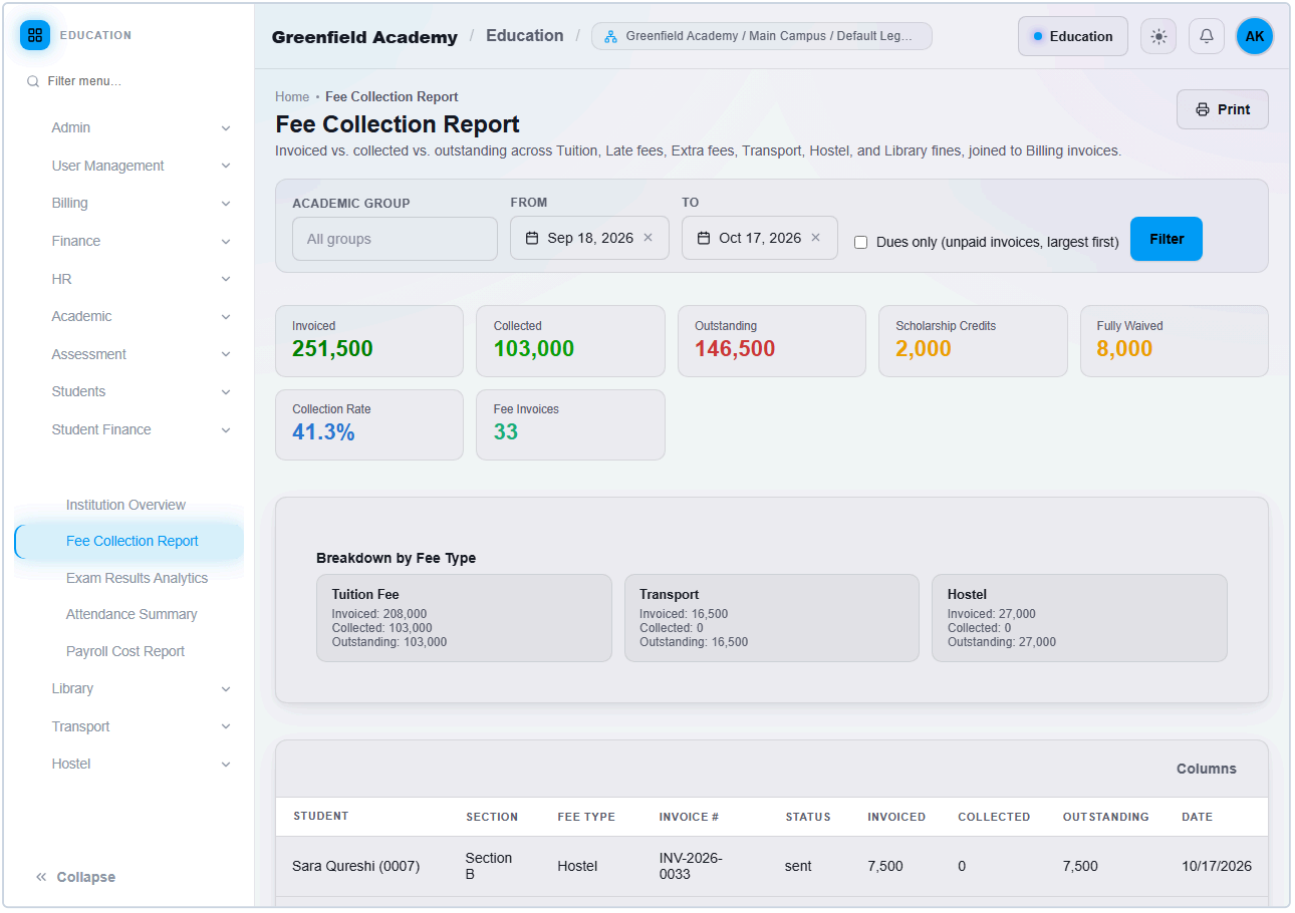
It shows these figures for the period:

- **Active Students**: students who are enrolled and active.
- **Fee Collection Rate**: how much of the fees invoiced has been collected.
- **Attendance Rate**: the share of marked student days that were present.
- **Exam Pass Rate**: the pass rate of published exams.
- **Library Books on Loan**, **Transport Utilization** and **Hostel Occupancy**.
- **Payroll Cost**.

A dash means there is nothing to measure yet, for example no published exam. Below the figures you see the enrollment trend, the fee collection trend (invoiced and collected) and the attendance rate trend.

Fee Collection Report

Invoiced, collected and outstanding amounts across tuition, late fees, extra fees, transport, hostel and library fines. Choose an **Academic Group** and dates, then click **Filter**. Tick **Dues only (unpaid invoices, largest first)** to list only the unpaid invoices. The cards show **Invoiced**, **Collected**, **Outstanding**, **Scholarship Credits**, **Fully Waived**, **Collection Rate** and the number of fee invoices, followed by a breakdown by fee type and the invoice list.

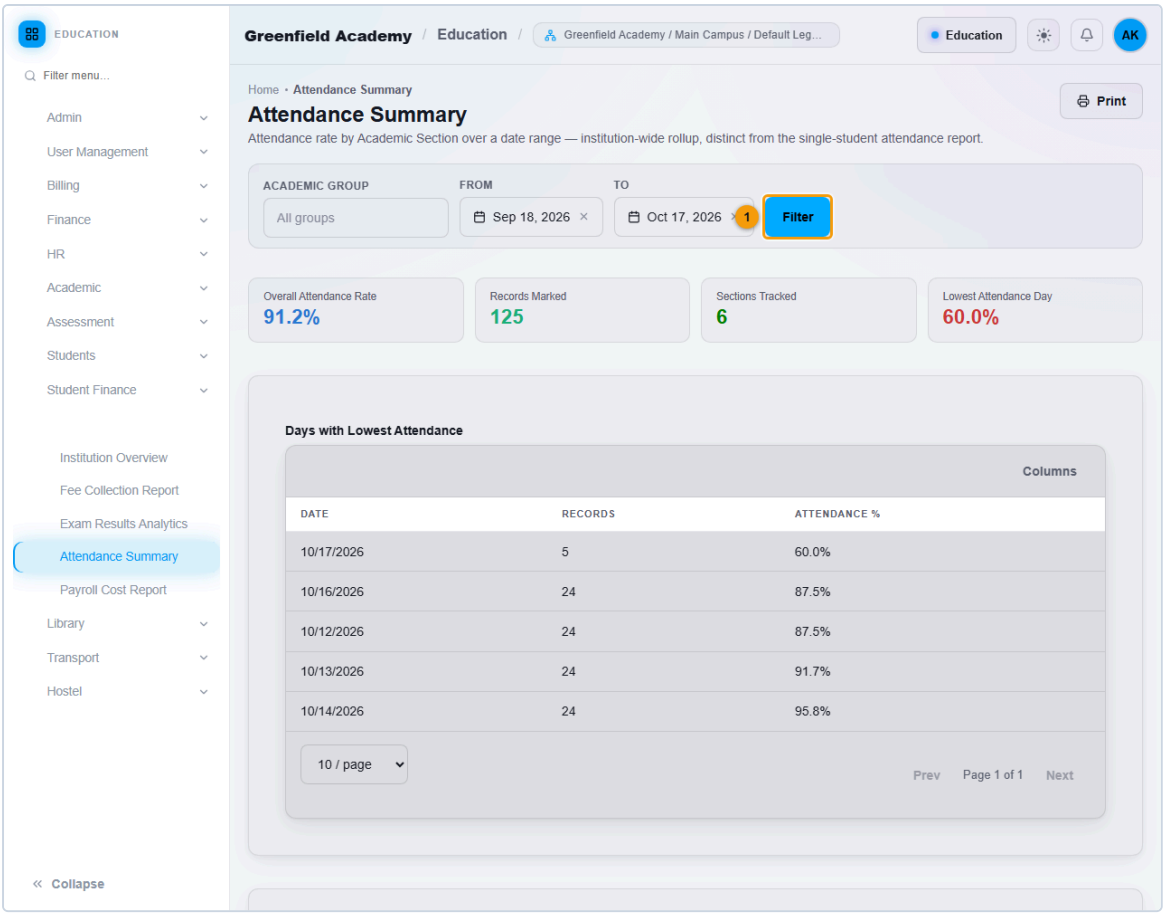


Totals and the breakdown by fee type.

See Student payments and fee statement for the Dues only filter and for a single student's fee statement.

Attendance Summary

The **student** attendance rate of every Section over a period, for the whole institution. Choose an **Academic Group** if you want and the dates, then click **Filter**. You see the overall rate, the number of records marked, how many Sections are tracked, the day with the lowest attendance, a table by day and a **Breakdown by Academic Section** with present, absent, late and leave counts.



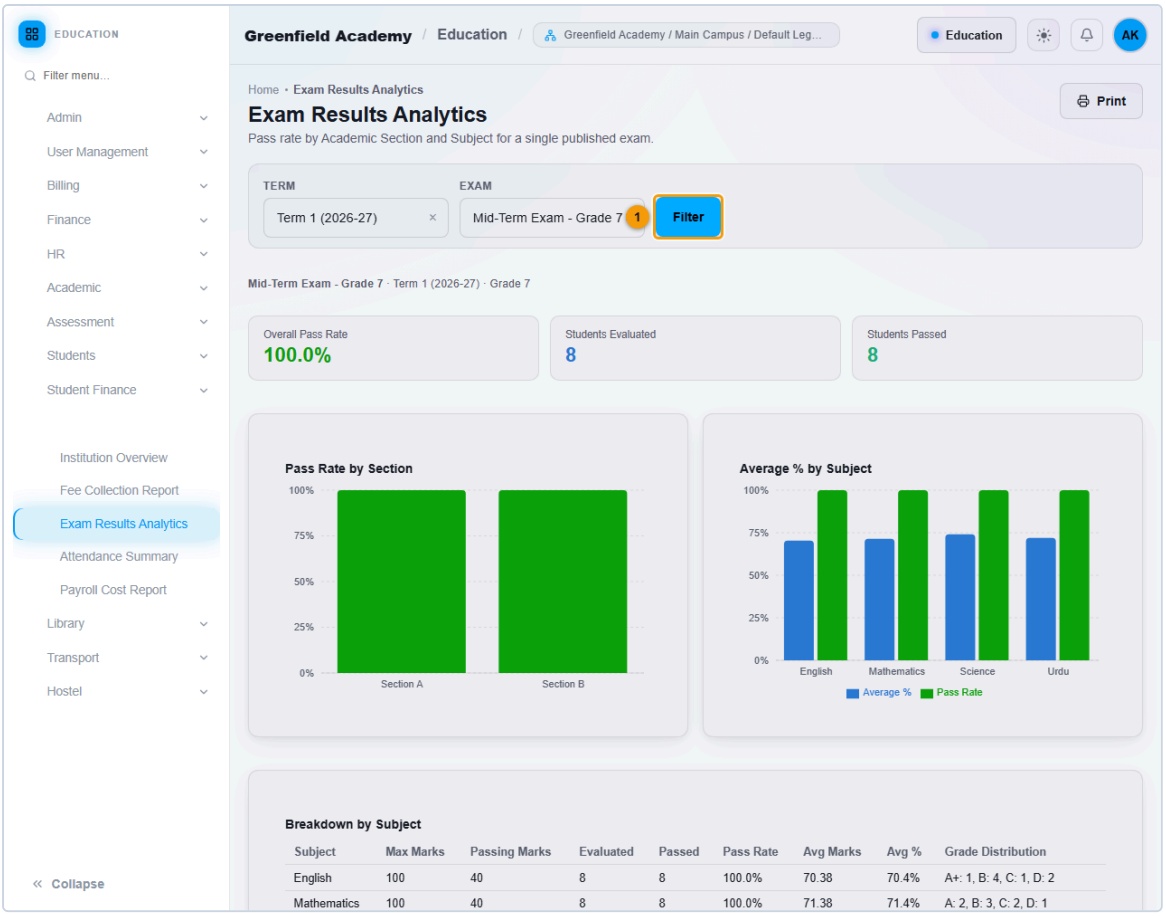
The overall rate, the weakest day and the breakdown by Section.

For one Section's daily register and trend, use **Academic**, **Attendance Report**. See Student attendance.

Staff attendance is separate. For your staff, open **HR**, then **Attendance**, then **Team Attendance**. See Staff and staff attendance.

Exam Results Analytics

The pass rate by Section and Subject for **one published exam**. Choose the **Term** and the **Exam**, then click **Filter**. Only published exams are offered.

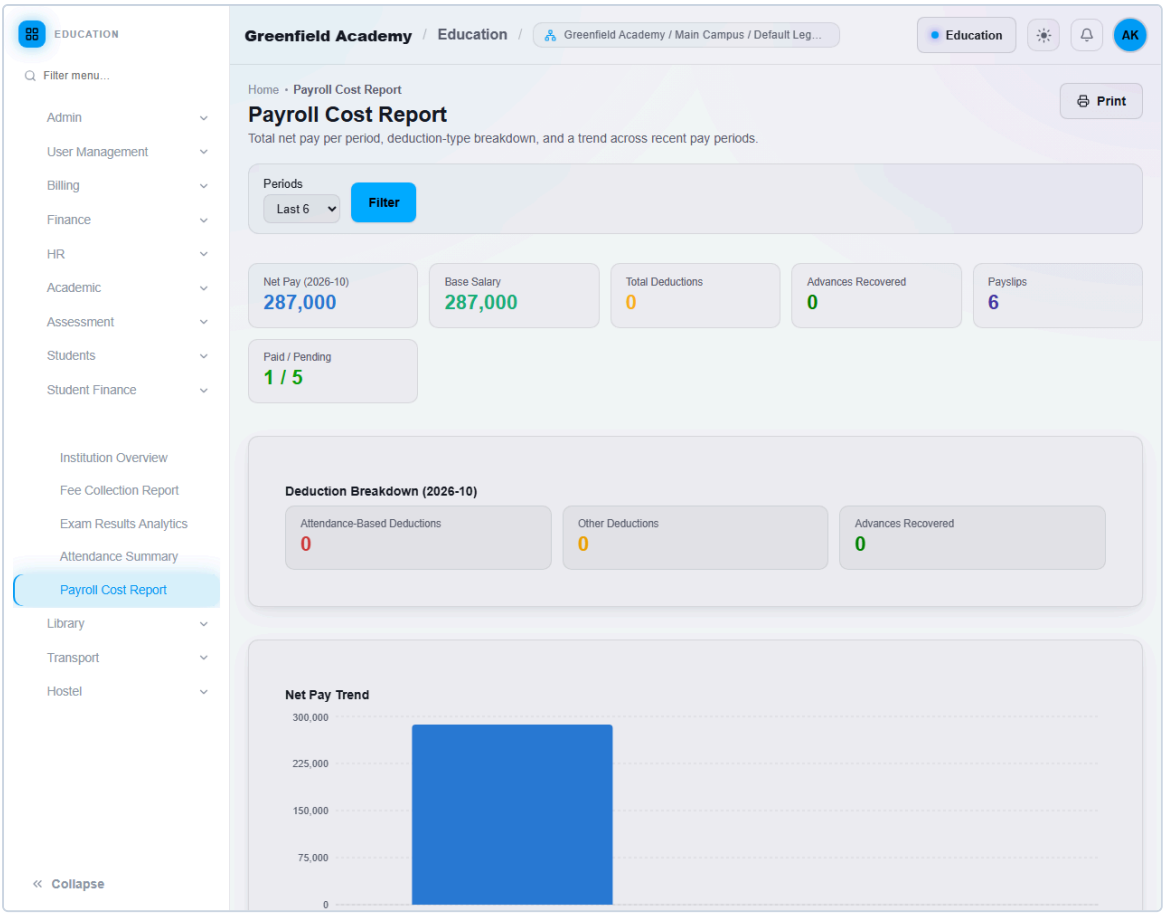


Pass rates for a published exam.

A single student's results are on the report card. See Exams, marks and report cards.

Payroll Cost Report

The total net pay for each month, a breakdown of deduction types and a trend. Choose **Last 3**, **Last 6** or **Last 12** periods and click **Filter**. It shows **No payroll runs found yet** until payroll has been generated.



The net pay of recent payroll runs.

Important rules

- Reports show the selected branch and the branches below it that you may see.
- Exam Results Analytics lists published exams only.
- Reports show what is recorded. A report cannot be more complete than attendance, marks and receipts that were saved.
- Education reports cover Education data. They are not the ERP or POS financial reports.

Common mistakes

- Reading the report for the wrong branch. Check the branch selector first.
- Looking for an exam in Exam Results Analytics before publishing it.
- Expecting dues to include waived fees. A waived fee is not owed.

Related guides

- Student payments and fee statement
- Student attendance
- Payroll

Education plans, limits and combining apps

Compare the three Education packages, understand the Student limit and User seats, and see how Education combines with ERP/POS and CRM in one account.

Plan: All Education packages

What this does

This guide compares the three Education packages, explains what limits them, and shows how Education sits beside the other NEXTOREx applications in one account.

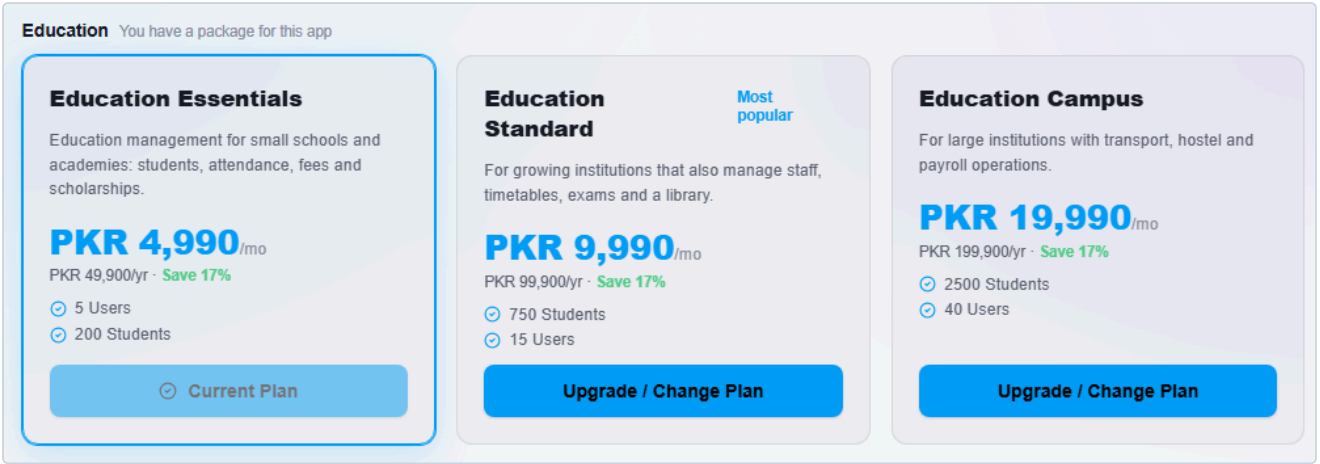
Who can use it

The owner or administrator of the account, who can open **Billing**, **Subscriptions**, **Subscription & Plans**.

The three Education packages

	Education Essentials	Education Standard (Most popular)	Education Campus
Monthly price	PKR 4,990 or USD 49	PKR 9,990 or USD 99	PKR 19,990 or USD 199
Yearly price	PKR 49,900 or USD 490	PKR 99,900 or USD 990	PKR 199,900 or USD 1,990
Students	200	750	2,500
Users	5	15	40

Education Standard is marked **Most popular** on the **Browse Plan** page.



The Education section of Browse Plan. Education Standard is marked Most popular.

What each package includes

- **Education Essentials**: students, academic structure (Groups, Sections and Subjects), student attendance, fees, scholarships and waivers, the shared finance screens for receipts and payments, the student fee statement, and the core reports (Institution Overview, Fee Collection Report and Attendance Summary).
- **Education Standard** adds: staff and staff attendance, timetable, exams, marks and report cards, the learning tools (study material, assignments and grading), the library and the Exam Results Analytics

report.

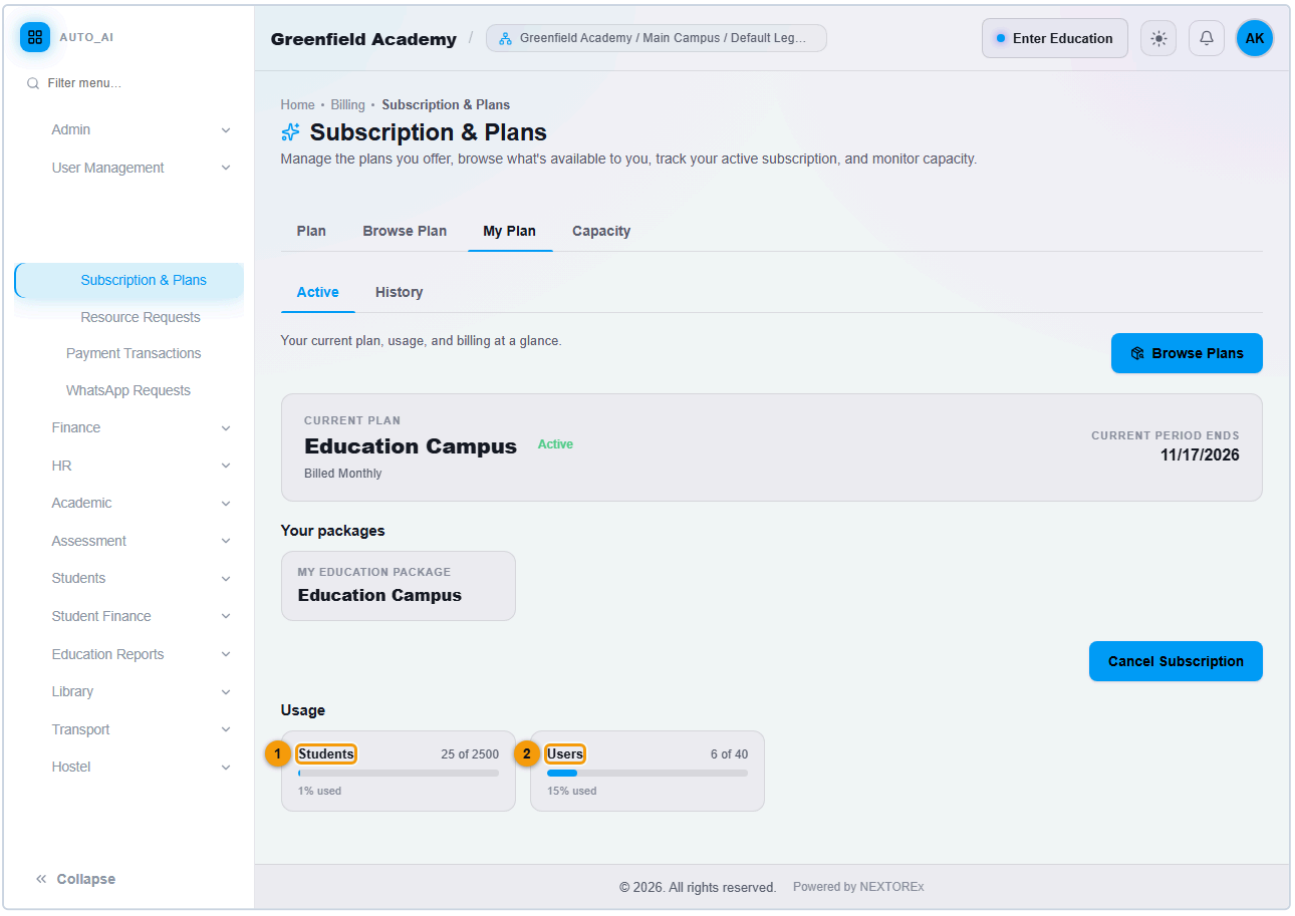
- **Education Campus** adds: transport, hostel and payroll, with the Payroll Cost Report.

Multi-branch setup is part of the NEXTOREx platform for every package. It is not a feature that only Education Campus has.

Prices and limits are the ones shown above. The **Browse Plan** page always shows the current prices in your billing currency.

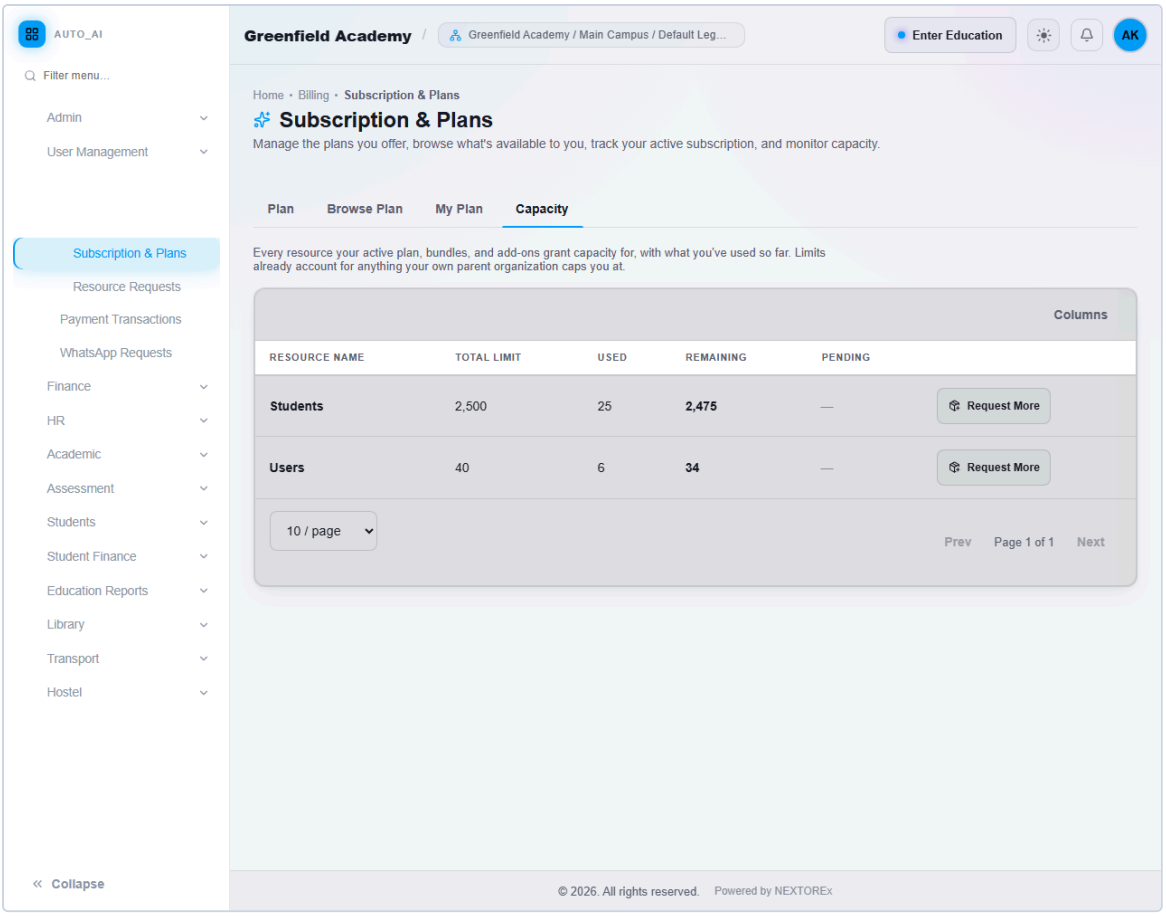
Where to see your package and usage

Open **Billing**, **Subscriptions**, **Subscription & Plans**, then **My Plan**. **Your packages** lists the package you have for each application. **Usage** shows **Students** and **Users** against your limits.



Students (1) and Users (2) are shown against the limits of the package.

The **Capacity** tab lists every limit with the total, the amount used and the amount remaining.



The Students limit with the number used and remaining.

The Student limit

A **billable Student** is a student who is **enrolled**, **active** and **not deleted**. Inquiry, Test, Admitted and Rejected records do not use a student place.

When usage reaches the limit of your package:

- your existing data stays safe,
- normal work that does not add a student keeps working, including inquiries, attendance, fees and reports,
- a new billable Student cannot be added until a place becomes free or you upgrade.

If you move to a smaller package than your current number of students, **no student is deleted**. For example, 600 students on a package that allows 200 stay in the system, and no new billable student can be added until the number is below the limit or you upgrade. More detail and the messages you will see are in Students: admission and management.

Users and staff

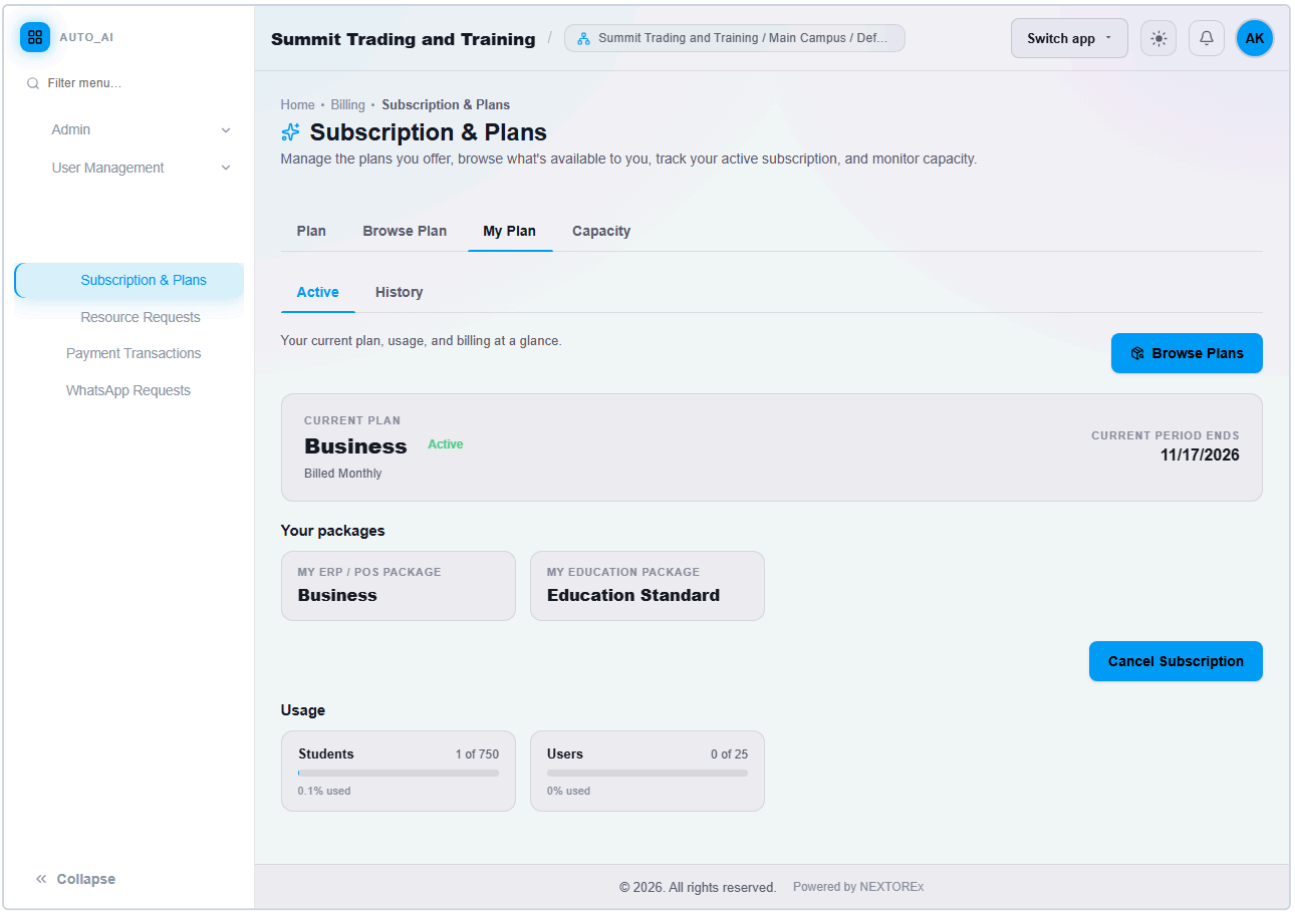
Your **Users** limit counts the people who sign in to run the institution. **Staff uses ordinary User seats.** Adding a staff member uses one seat. There is no separate staff limit. **Student portal logins do not use User seats.**

Combine Education with other applications

NEXTOREx has three applications that you can buy independently:

- **ERP/POS**
- **CRM**
- **Education**

You can have any combination in one account. Each application keeps its **own package**. For example, a business can have the **Business** ERP/POS package and **Education Standard** together. Buying one application never gives you another, and a package of one application does not change the package of another.



This account has the Business package for ERP/POS and Education Standard. Users are added together: 10 + 15 = 25.

To add an application:

1. Open **Billing**, **Subscriptions**, **Subscription & Plans**, then **Browse Plan**.
2. Find the application. If you do not have it yet, click **Add this app** on the package you want.
3. To change the package of an application you already have, click **Upgrade / Change Plan** on another package of the same application.

Limits that are the same kind add up across packages. With ERP/POS Business (10 users) and Education Standard (15 users), the account has 25 users.

All packages in one account share the same billing period and the same currency, which are set by your subscription. See Your plan, usage and billing period.

White Label, Custom Domain and Reseller are not applications

White Label, **Custom Domain** and **Multi-Tenant (reseller)** are platform capabilities that come with certain plans, for example the Agency plan. They are not applications. The Education packages do not include them, and an Agency plan does not automatically include Education. If an Agency account also wants Education, it adds an Education package.

If you move to another package

- **Upgrade**: the new features open and the higher limits apply.
- **Downgrade**: your records are kept. Screens that belong to the larger package are no longer available, and nothing is deleted.

See Browse and change your plan.

Important rules

- A Student place is used only by enrolled, active students.
- Staff use User seats. Students do not.
- Applications are bought separately and each keeps its own package.
- Moving to a smaller package never deletes records.

Common mistakes

- Expecting a larger Education package to give you ERP/POS or CRM. They are separate applications.
- Counting inquiries against your Student limit. They are not counted.
- Forgetting that every staff member uses a User seat.

Related guides

- Students: admission and management
- Staff and staff attendance
- Browse and change your plan
- Your plan, usage and billing period

Basic Manufacturing

Bill of Materials and Production Orders

Bill of Materials (Product Orders)

Define which materials, and how much of each, make one finished product.

Plan: Pro and above

What this does

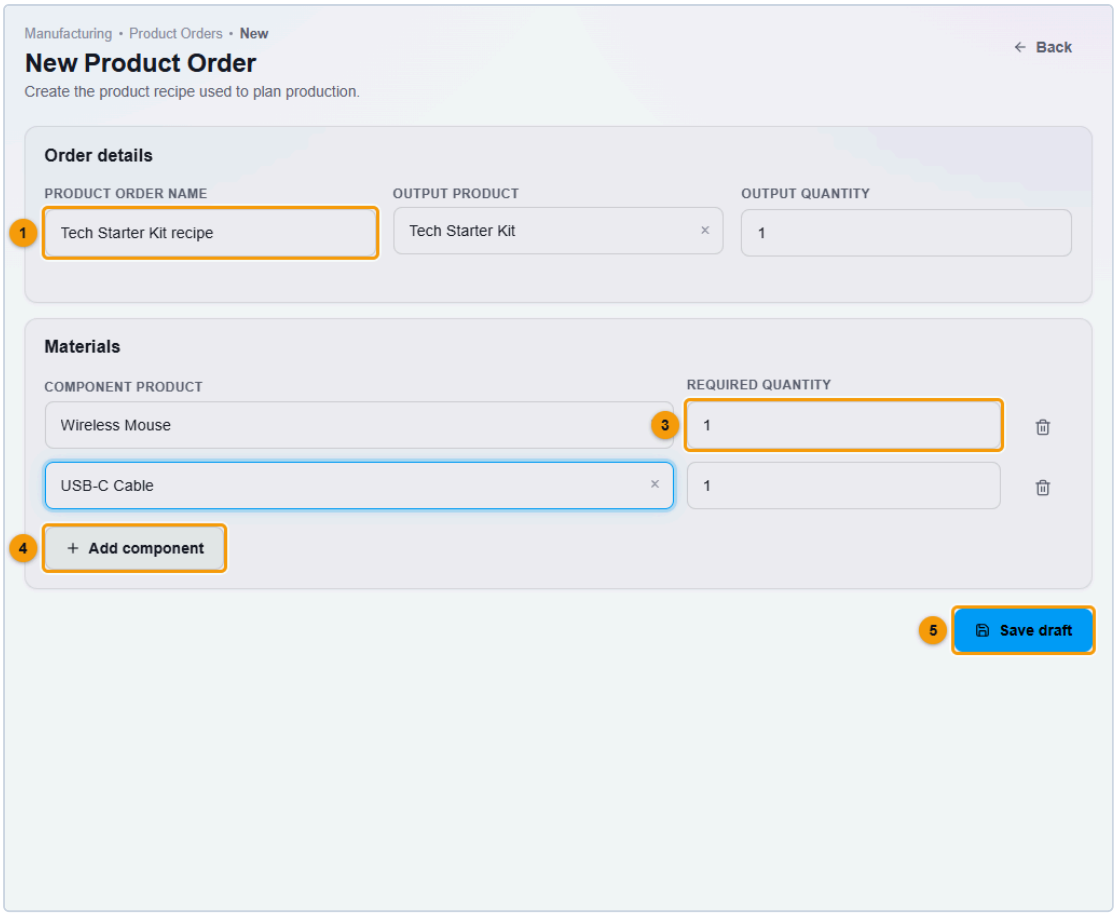
Basic Manufacturing: Bill of Materials and Production Orders. A Bill of Materials (BOM) lists the materials needed to make one finished product. In NEXTOREx the Bill of Materials is called a **Product Order**. You create it once, then use it every time you make that product.

Before you start

- The finished product and each material must exist as products.
- On the finished product, switch on **Manufacture this item**. On each material, switch on **Use as component**. These switches are under **How will this item be used?**.

Steps

1. Open **Inventory**, then **Manufacturing**, then **Product Orders**.
2. Click **New product order**.

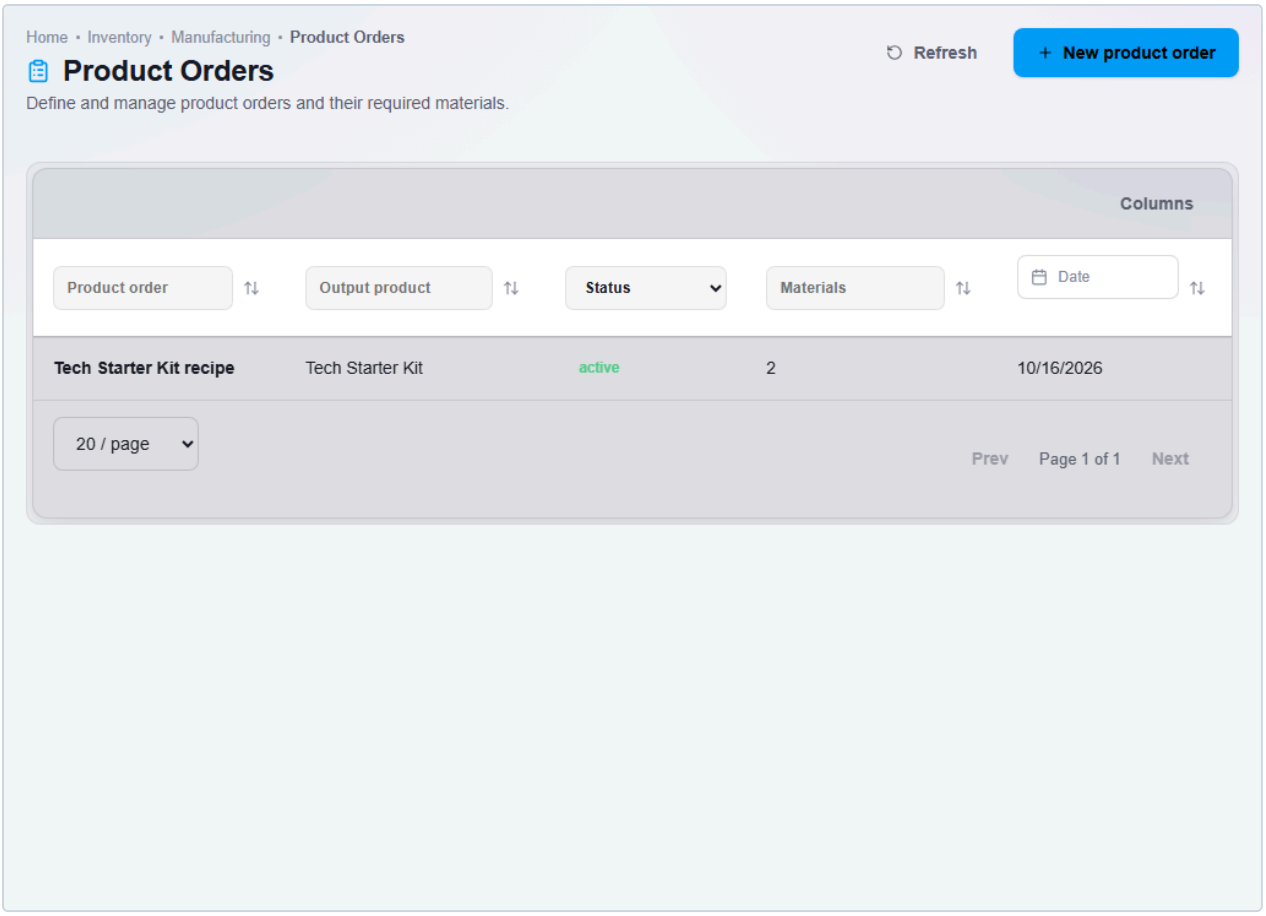


Name (1), output product (2), materials (3), Add component (4) and Save draft (5).

3. Enter a **Product order name** (1), for example *Tech Starter Kit recipe*.
4. Choose the **Output product** (2), the finished product, and the **Output quantity**, how many one run makes.
5. Under **Materials**, choose the **Component product** (3) and the **Required quantity**.
6. Click **Add component** (4) for each extra material.
7. Click **Save draft** (5).

What happens next

The Product Order is saved as **draft** and listed with the number of materials.



Your Bills of Materials and their status.

A draft cannot be used for production yet. To make it ready:

1. Right-click the Product Order in the list.
2. Choose **Status action**. The status changes to **active**.

Double-click a Product Order to see its output, quantity and the material requirements.

Important notes

- Only **active** Product Orders can be chosen when you plan production.
- This is basic manufacturing: a list of materials and a production run. It is not material requirements planning or factory scheduling.

Related guides

- Production orders
- Add a product

Production orders

Plan a production run, check that you have the materials, and complete it to make finished stock.

Plan: Pro and above

What this does

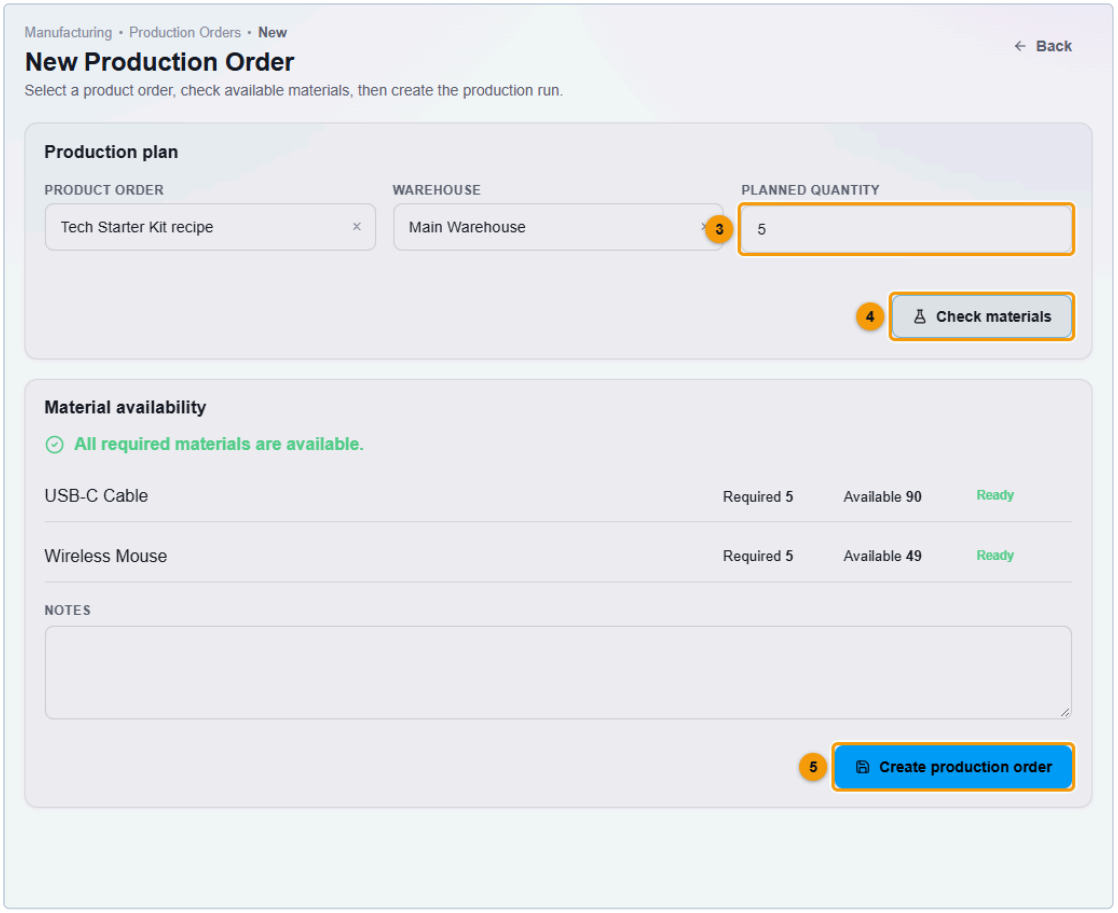
A production order is one run of making a product. When you complete it, NEXTOREx uses up the materials and adds the finished product to your stock.

Before you start

- Create an active Bill of Materials (Product Order).
- Have enough stock of each material in the warehouse.

Steps

1. Open **Inventory**, then **Manufacturing**, then **Production Orders**.
2. Click **New production order**.



Product order (1), warehouse (2), planned quantity (3), Check materials (4) and Create production order (5).

3. Choose the **Product order** (1). Only active Product Orders are listed.
4. Choose the **Warehouse** (2) and enter the **Planned quantity** (3).

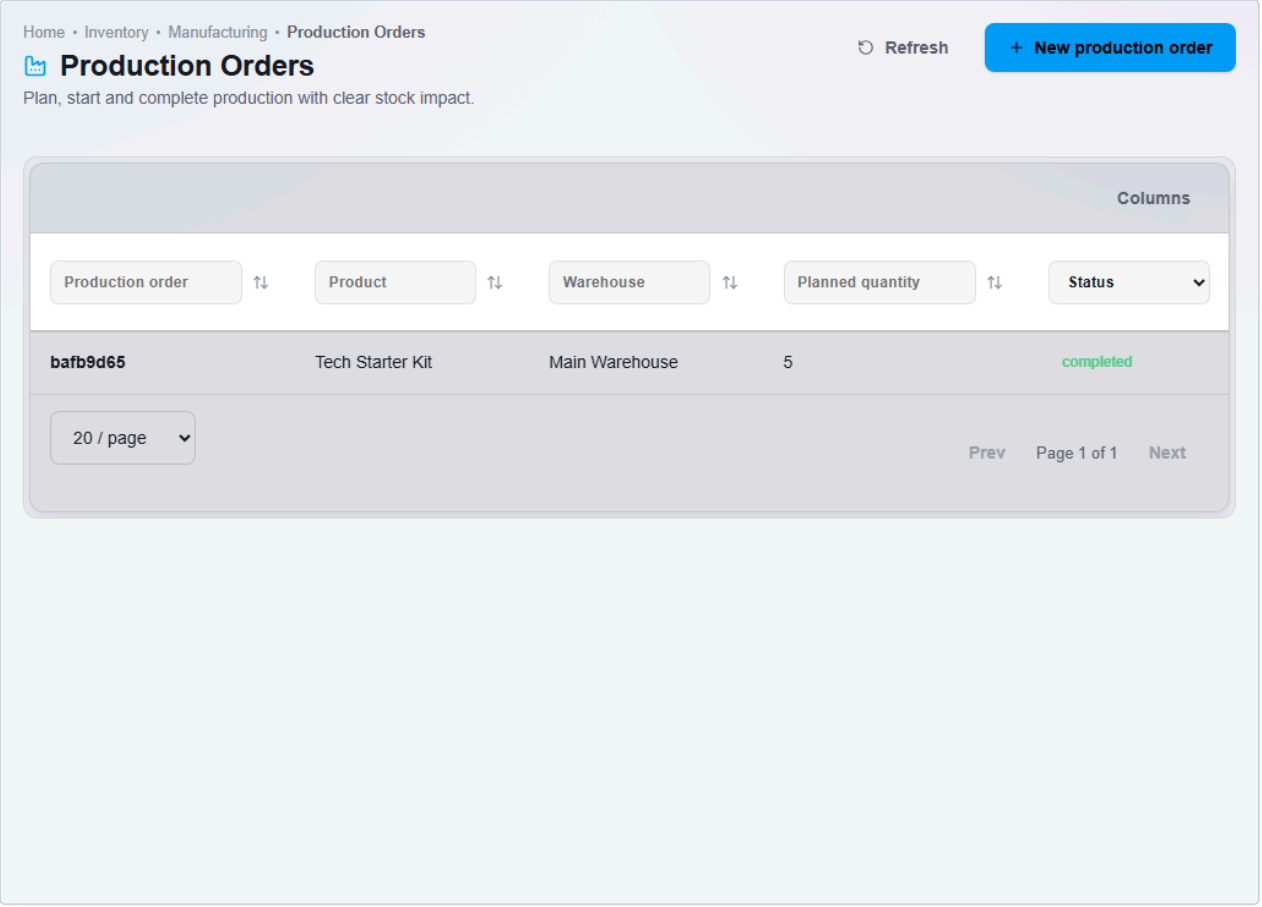
5. Click **Check materials** (4). A list shows, for each material, how many are **Required** and **Available**, with a **Ready** mark when you have enough.
6. Add notes if you want, then click **Create production order** (5).

The production order is saved as **draft**.

1. To complete the run, right-click the production order in the list and choose **Status action**.

What happens next

The status changes to **completed**.



A completed production order.

In your stock, the quantity of the finished product goes up by the planned quantity, and each material goes down by the amount the run used.

Important notes

- Check materials before you create the order. If a material is short, buy or add stock first.
- Click **Status action** once. It completes the run.

Related guides

- Bill of Materials (Product Orders)
- Stock movements

Users, Roles & Permissions

Add staff and control what they can do

How access works: plans, roles and permissions

Understand what your plan allows, and how roles decide what each staff member can do.

Plan: All plans

What this does

Two things decide what a person can do in NEXTOREx:

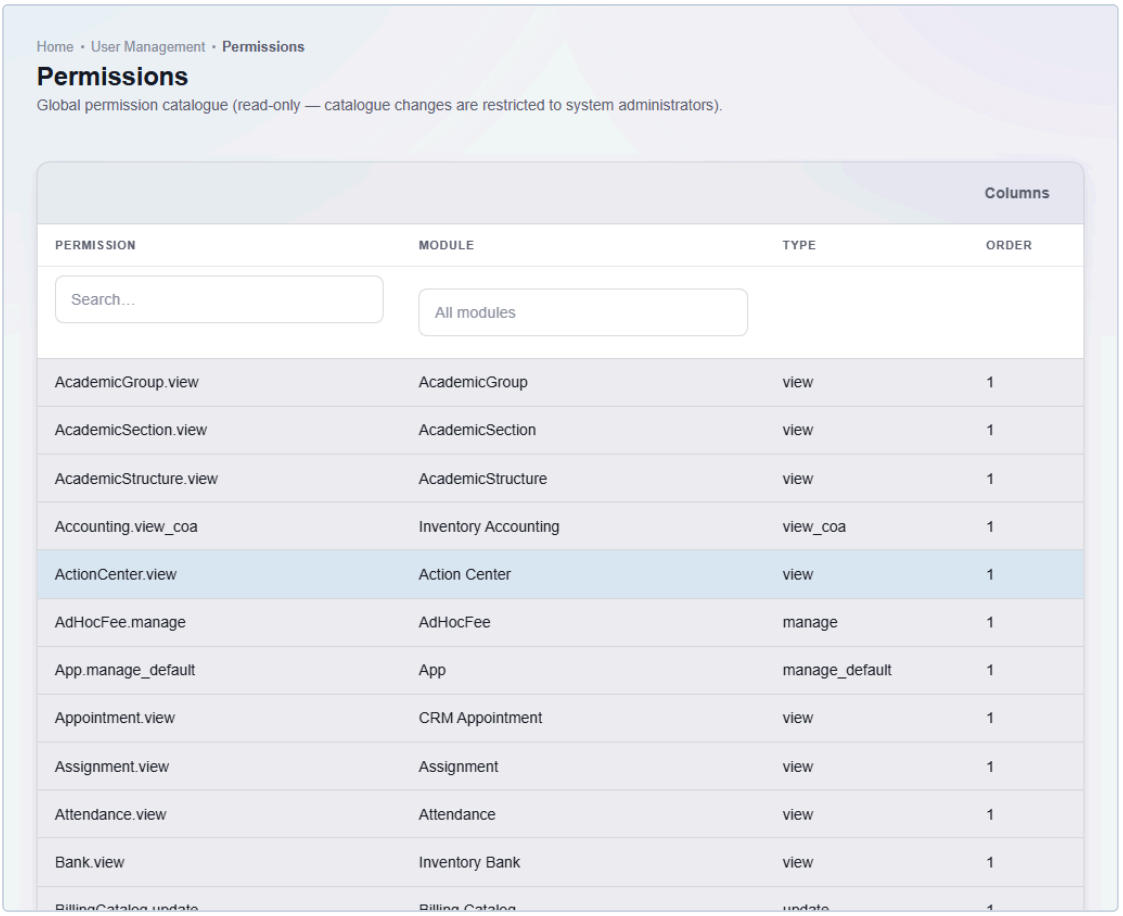
1. **Your plan** decides what your business can use at all. For example, accounting vouchers and bank features come with Business and higher plans, and Basic Manufacturing comes with Pro and higher plans.
2. **A role** decides what each staff member can do inside what your plan allows. For example, a cashier role can use POS Checkout and customers but not accounting.

A role can never give someone something your plan does not include.

Plans are bought per application: ERP/POS, CRM and Education each have their own packages. A person can open an application only if your account has a package for it and their role allows it. In Education, a teacher who is assigned to a Subject and Section sees only those Sections for attendance, marks and learning material. See Education plans, limits and combining apps.

How to see it

- Open **User Management**, then **Roles** to see your roles. The list shows how many permissions each role has and how many users have it.
- Open **User Management**, then **Permissions** to see the full list of permissions NEXTOREx has. This is a reference list. You give permissions to people through roles.



Each permission belongs to a module, for example Customer or Warehouse.

What happens next

- To create a role, see Roles.
- To give a role to a person, see Add a user.
- If a menu item or a button is missing for someone, check their role first, then check that your plan includes the feature.

Important notes

- The person who sets up the business gets an **Admin** role. Keep the Admin role for the people who run the business.

Related guides

- Roles
- Add a user
- Staff and staff attendance

Roles

Create a role for a type of job, choose what it can do, and see which users have it.

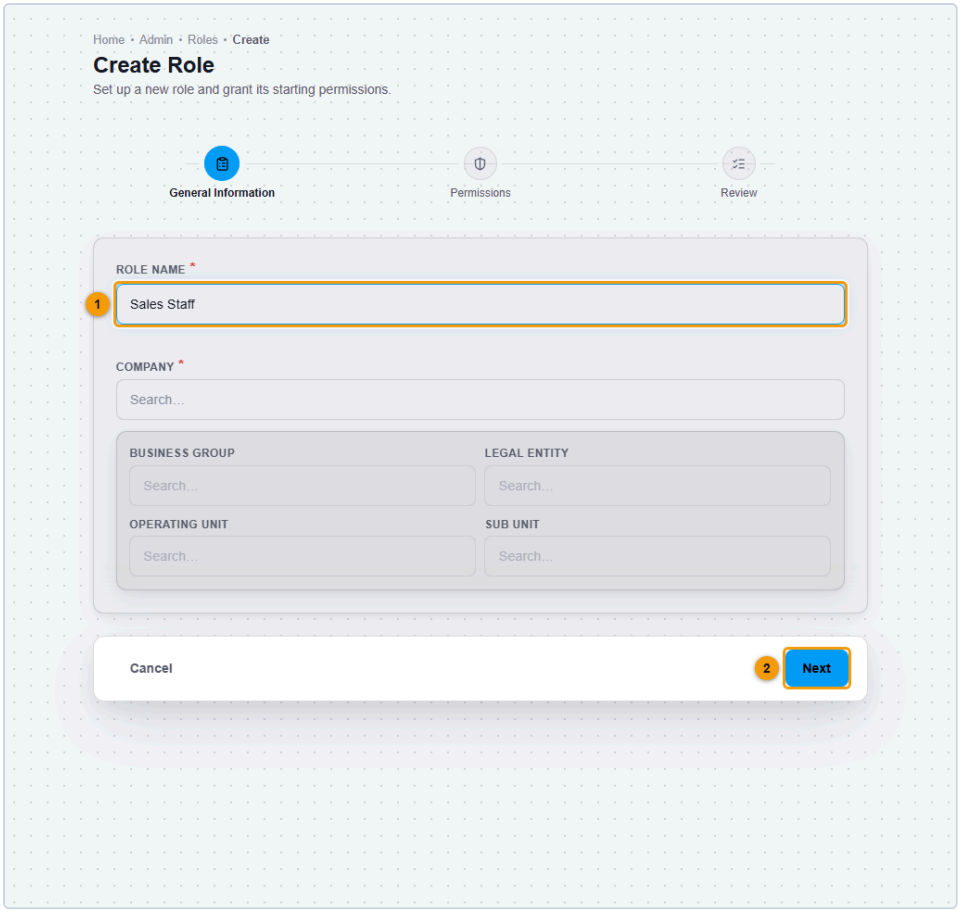
Plan: All plans

What this does

A role is a set of permissions for a type of job, such as Sales Staff. When you give a person a role, they can do what the role allows and nothing more.

Steps

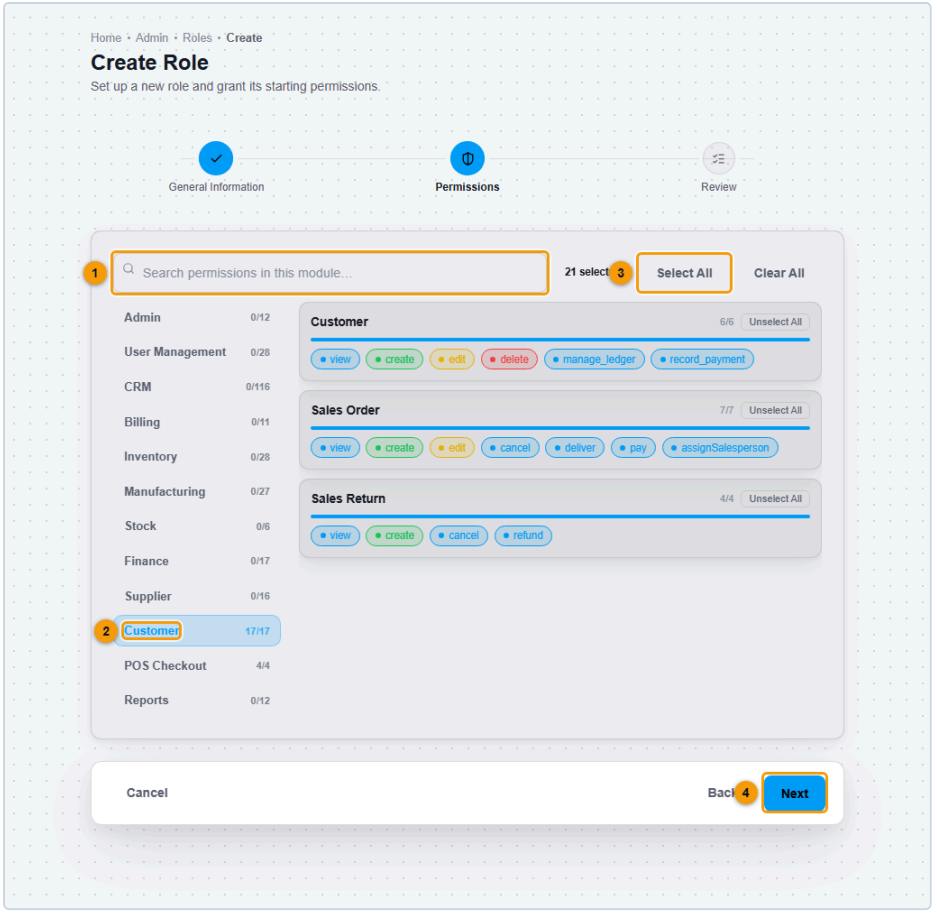
1. Open **User Management**, then **Roles**.
2. Click **Add Role**. The **Create Role** page opens with three steps: **General Information**, **Permissions** and **Review**.



Name the role (1), then click Next (2).

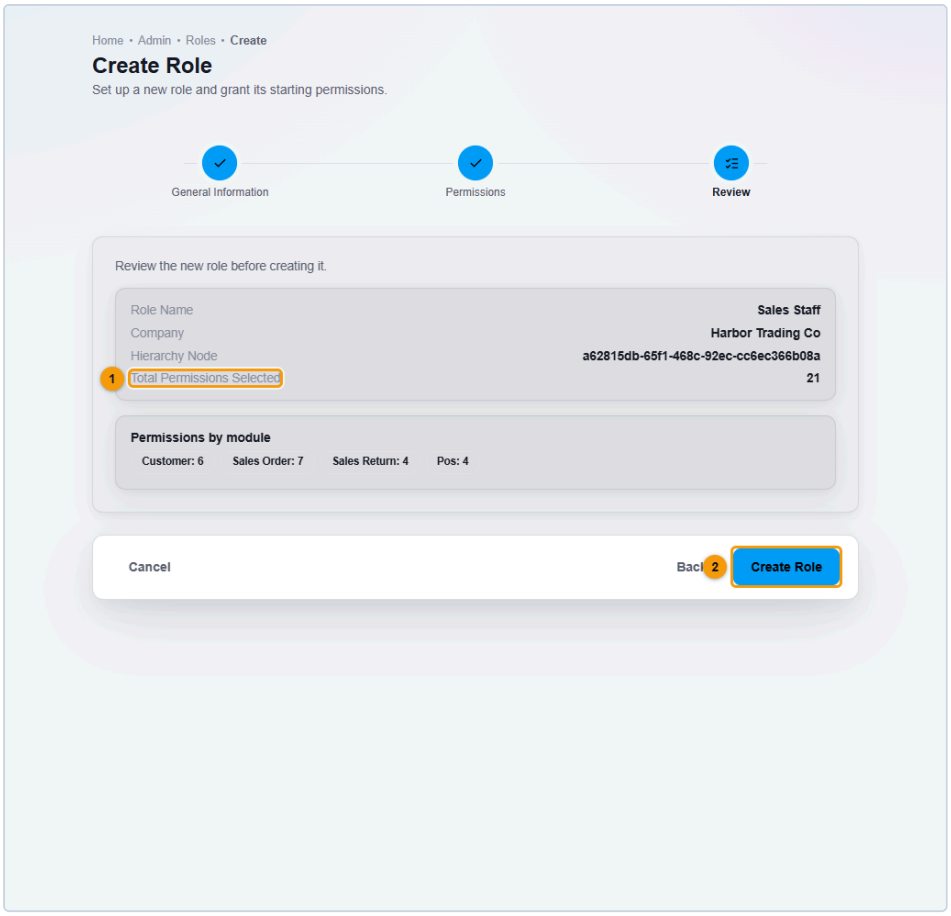
3. Enter the **Role name** (1), for example *Sales Staff*. If you have more than one company, choose the **Company**. Then choose the **Hierarchy** (see below). Click **Next** (2).
4. On the **Permissions** step, choose what the role can do.
   - The list on the left shows modules, such as **Customer**, **Inventory** and **POS Checkout**, with how many permissions you picked in each.
   - Click a module (2). Each feature shows buttons such as **view**, **create**, **update** and **delete**. Click the ones you want, or click **All** for that feature.

- Click **Select All** (3) to pick every permission in the module you are viewing.
- Use the search box (1) to find a permission.



Search (1), pick a module (2), Select All (3) and Next (4).

5. Click **Next** (4).
6. Check the **Review** page. It shows the role name and how many permissions are selected in each module.

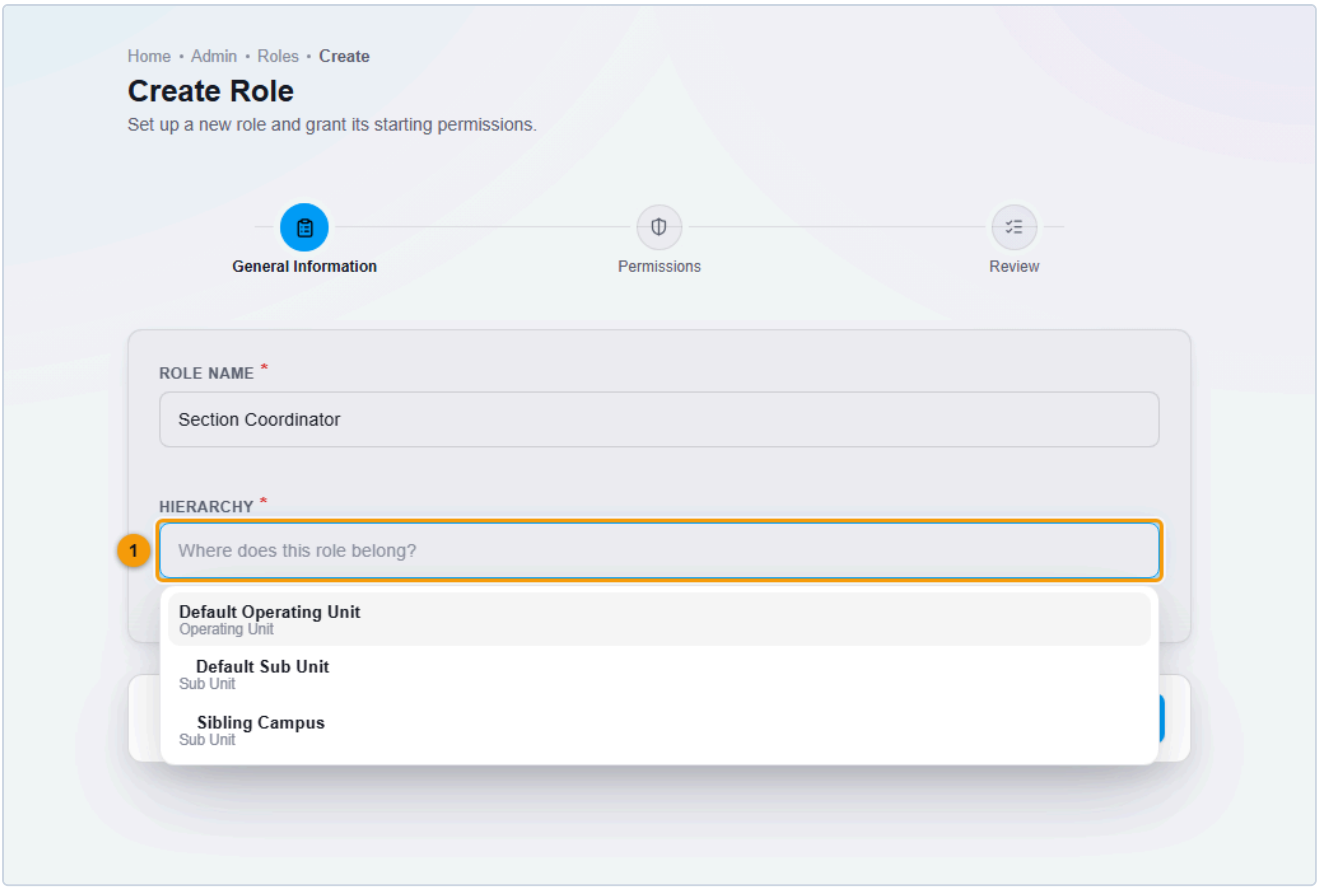


Check the summary, then click Create Role.

7. Click **Create Role**.

Choose the hierarchy of a role

Every role belongs to one place in your hierarchy: a Business Group, a Legal Entity, an Operating Unit or a Sub Unit. On **General Information**, the **Hierarchy** box asks **Where does this role belong?**



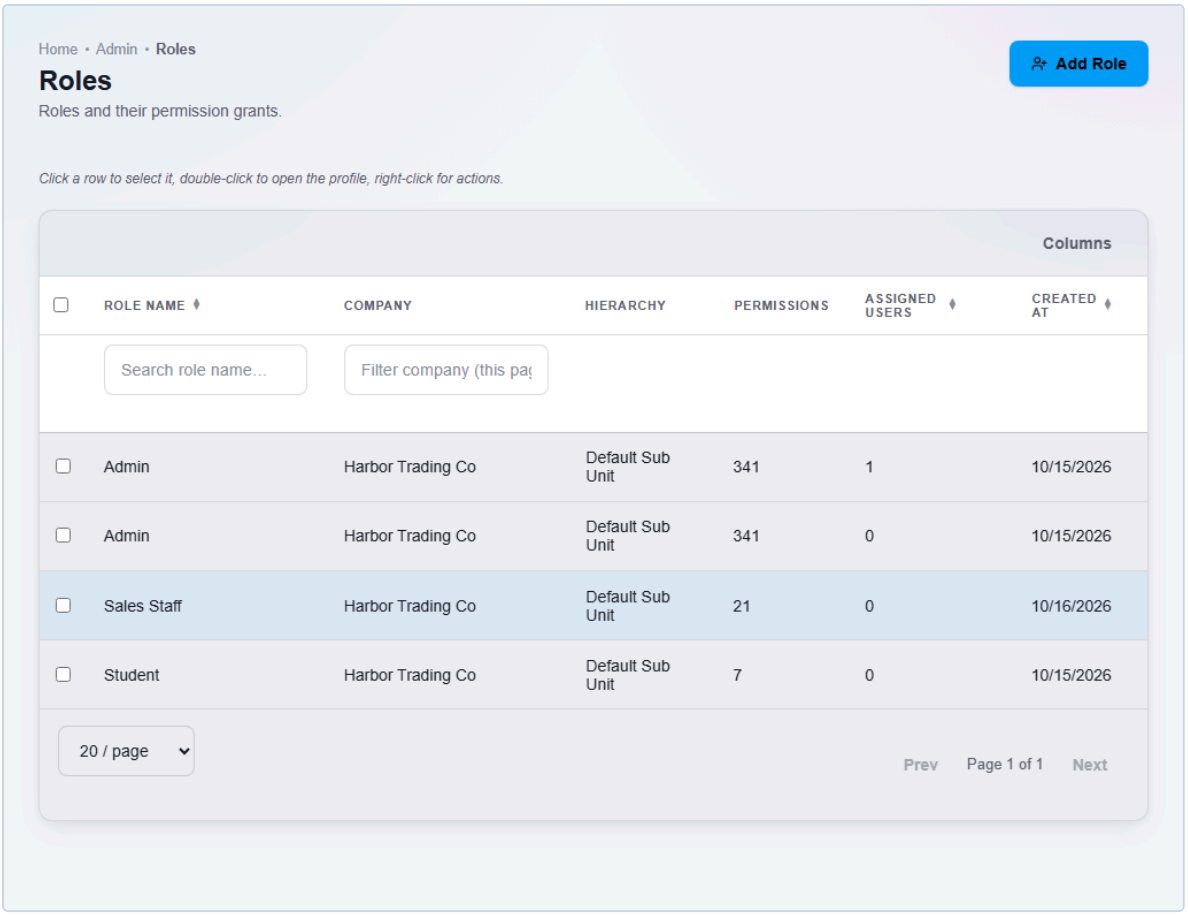
The Hierarchy box (1) lists only your own place and the places beneath it.

- The list shows **only the places you are allowed to manage**: your own place and the places beneath it.
- A user at a higher level, for example an Operating Unit manager, can create and manage roles for the Sub Units beneath them.
- A user at a lower level cannot create a role in a parent, a sibling or an unrelated branch, and those places never appear in the list.
- The hierarchy of a role is fixed when you create it. Only its permissions can be changed later.

The role and staff lists you choose from when you add a user or a staff member follow the same rule. You see only the roles of your own place and the places beneath it.

What happens next

The role appears in the **Roles** list with its number of permissions and **Assigned users**.



Your roles.

To see or change a role later, double-click it in the list.

Important notes

- Only permissions that your plan includes are useful. A role cannot unlock a feature your plan does not have.
- For a teacher, give only what the job needs, for example marking attendance and entering marks. The Subjects and Sections they teach come from their assignment on the **Staff** screen, not from the role. Giving a role the permission to manage the learning tools gives access to every Subject and Section. See Staff and staff attendance.
- Start with the fewest permissions a job needs. Add more if the person cannot do something they need.

Related guides

- How access works
- Add a user

Add a user

Add a staff member, choose which apps they can open, and give them a role in your business.

Plan: All plans (the number of users depends on your plan)

What this does

Adding a user gives a staff member their own login. You choose which apps they can open and which role they have.

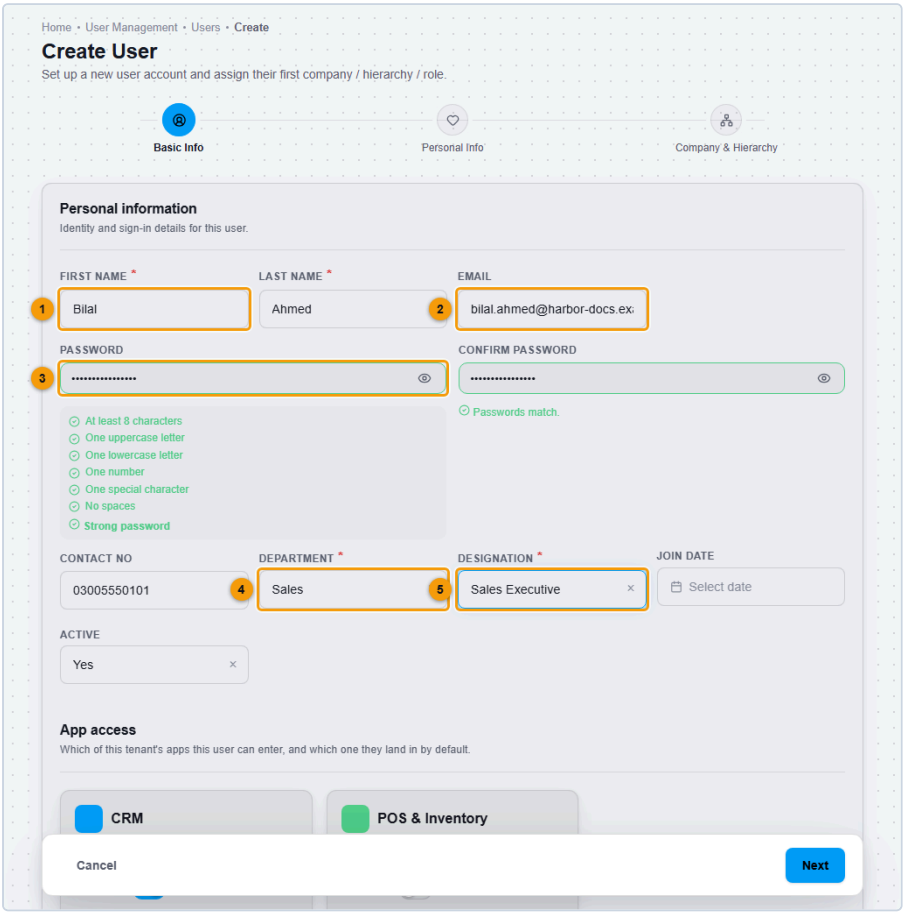
Before you start

- Create the role the person will have.
- Check your plan's user limit. Open **Billing**, then **Subscription & Plans**, then **My Plan** and look at **Users** under Usage.

Steps

1. Open **User Management**, then **Users**.
2. Click **Add User**. The **Create User** page opens with three steps.

Step 1: Basic Info



Name (1), email (2), password (3), department (4) and designation (5).

1. Enter the **First name** and **Last name** (1), and the **Email** (2). The email is what the person signs in with.

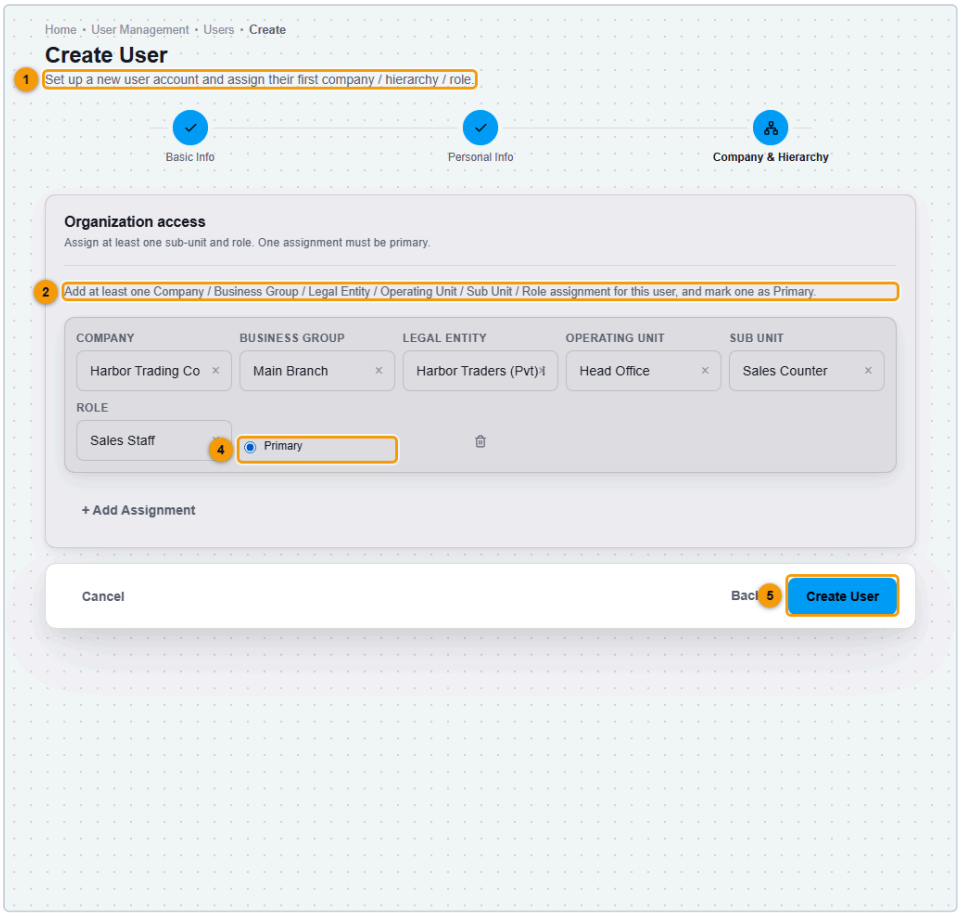
2. Enter a **Password** (3) and type it again in **Confirm password**. The page shows a checklist: at least 8 characters, one uppercase letter, one lowercase letter, one number and one special character, with no spaces.
3. Choose the **Department** (4) and then the **Designation** (5). Both are required. Choose Department first, because Designation depends on it.
4. Under **App access**, each app shows **Granted** or **Not granted**. Use the **Access** button to choose which apps this person can open.
5. Click **Next**.

Step 2: Personal Info

1. These details are optional, for example date of birth and address. Click **Next**.

Step 3: Company & Hierarchy

1. Click **+ Add Assignment**. Choose the **Company**, then each level below it: **Business Group**, **Legal Entity**, **Operating Unit** and **Sub Unit**. Each box fills after you pick the one before it.
2. Choose the **Role**. The list contains only roles from your own place in the hierarchy and the places beneath it.
3. Mark the assignment as **Primary**.

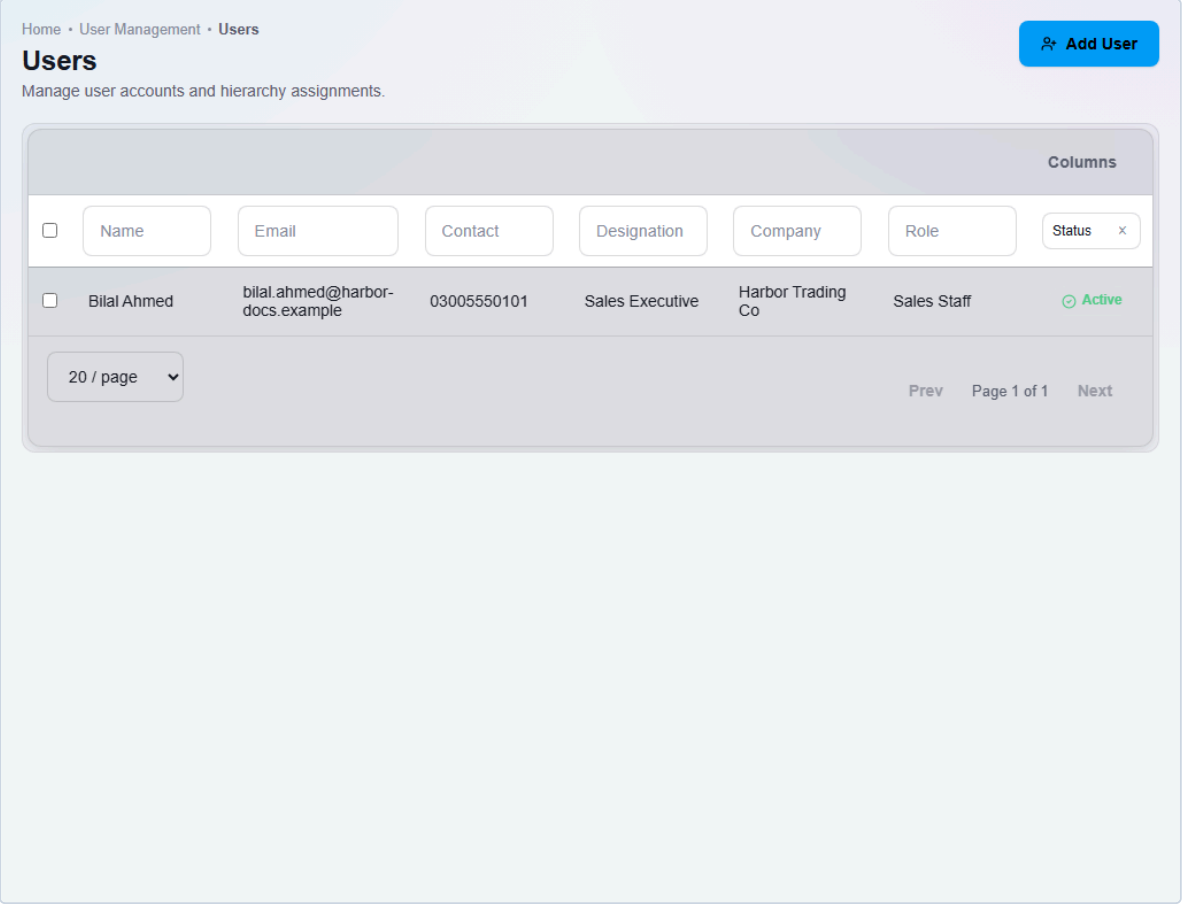


Where the person works and their role.

4. Click **Create User**.

What happens next

The person appears in the **Users** list with their designation, company and role.



The new user is listed as Active.

They can sign in with their email and password.

Important notes

- Every user needs at least one assignment to a Sub Unit with a role. One assignment must be primary.
- To give someone more than one place or role, click **+ Add Assignment** again.
- Every user uses one **User** seat of your plan. A staff member added in Education, under **HR**, **Staff**, also uses one seat. **Student portal logins do not use seats.** See Education plans, limits and combining apps.
- If you have reached your plan's user limit, ask to add more users or move to a bigger plan. See Your plan.

Related guides

- Roles
- Your company and branches
- Staff and staff attendance

Your company and branches

Understand your company, business groups and units, and how staff are placed in them.

Plan: All plans

What this does

NEXTOREx organises your business as a tree. You set it up once when you first sign in, and you place staff in it when you add them.

From top to bottom the levels are:

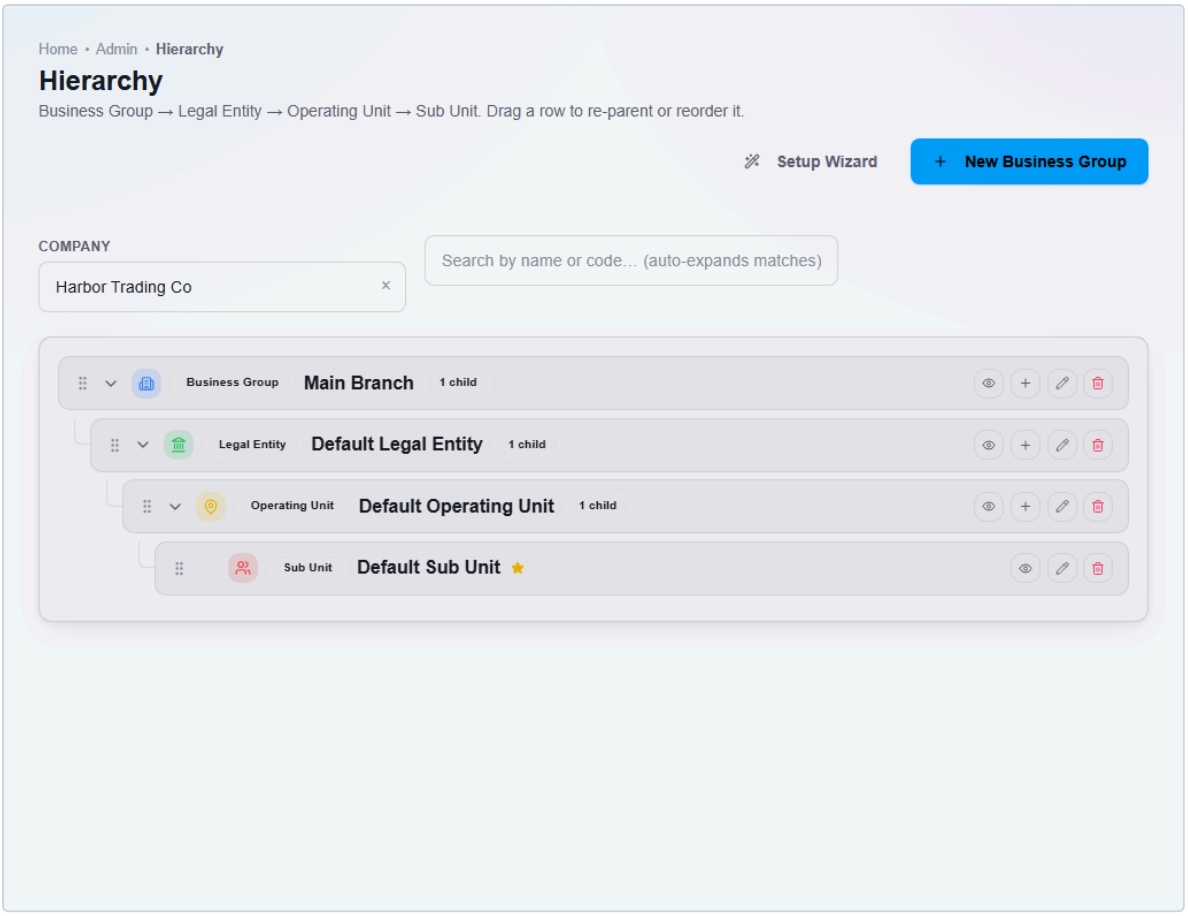
1. **Company**
2. **Business Group**, for example a branch or a division
3. **Legal Entity**
4. **Operating Unit**
5. **Sub Unit**, the smallest level where staff work

Small businesses usually have one of each. Setup creates them for you.

Steps

To see your structure:

1. Open **Admin**, then **Hierarchy**.
2. Choose your **Company** at the top if you have more than one.
3. Read the tree. Click the small arrow on a row to open or close it.

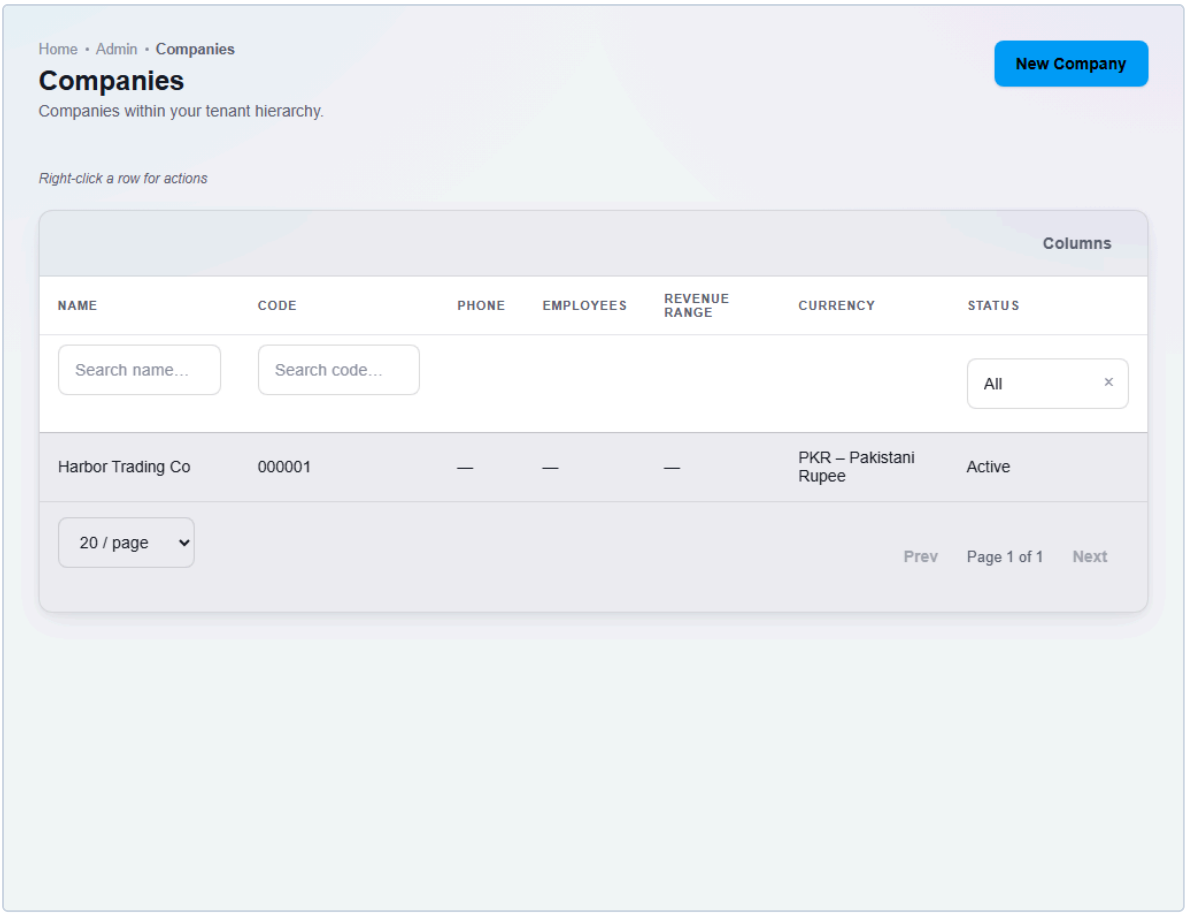


One Business Group with its Legal Entity, Operating Unit and Sub Unit.

To change it:

- Each row has small icons to view, add, edit and delete.
- Click **New Business Group** to add a new branch or division at the top.
- Click **Setup Wizard** for guided setup.

To see your companies, open **Admin**, then **Companies**.



Your companies.

What happens next

The top bar shows where you are working, for example *Main Branch / Default Legal Entity / Default Operating Unit / Default Sub Unit*. When you add a user, you place them at a Sub Unit and give them a role.

What counts as one hierarchy

Some accounts have a limit on how many hierarchies they can have. This is how they are counted:

- **One hierarchy is one Business Group and everything under it**, including its Legal Entities, Operating Units and Sub Units.
- Your **Company** does not count as a hierarchy.
- Adding a Legal Entity, an Operating Unit or a Sub Unit inside a Business Group does **not** use another hierarchy.
- Another, independent Business Group is another hierarchy.

The standard NEXTOREx plans do not limit the number of hierarchies. A limit applies only when one has been set for your account. This is separate from the number of client businesses an Agency can have. See Agency limits and rules.

Important notes

- The first-time setup asks for a name for each level. If setup stops with an error after you go back and start again, use new names rather than names you already entered, or ask support.
- A star appears next to the default Sub Unit.

Related guides

- Complete your company setup
- Add a user
- Agency limits and rules

Edit a user and change where they work

Change a staff member's details, switch their account off, or move them to another branch or unit with Assign Hierarchy.

Plan: All plans

What this does

You can change a staff member's details after you add them, switch their account off, and change which branch or unit they work in.

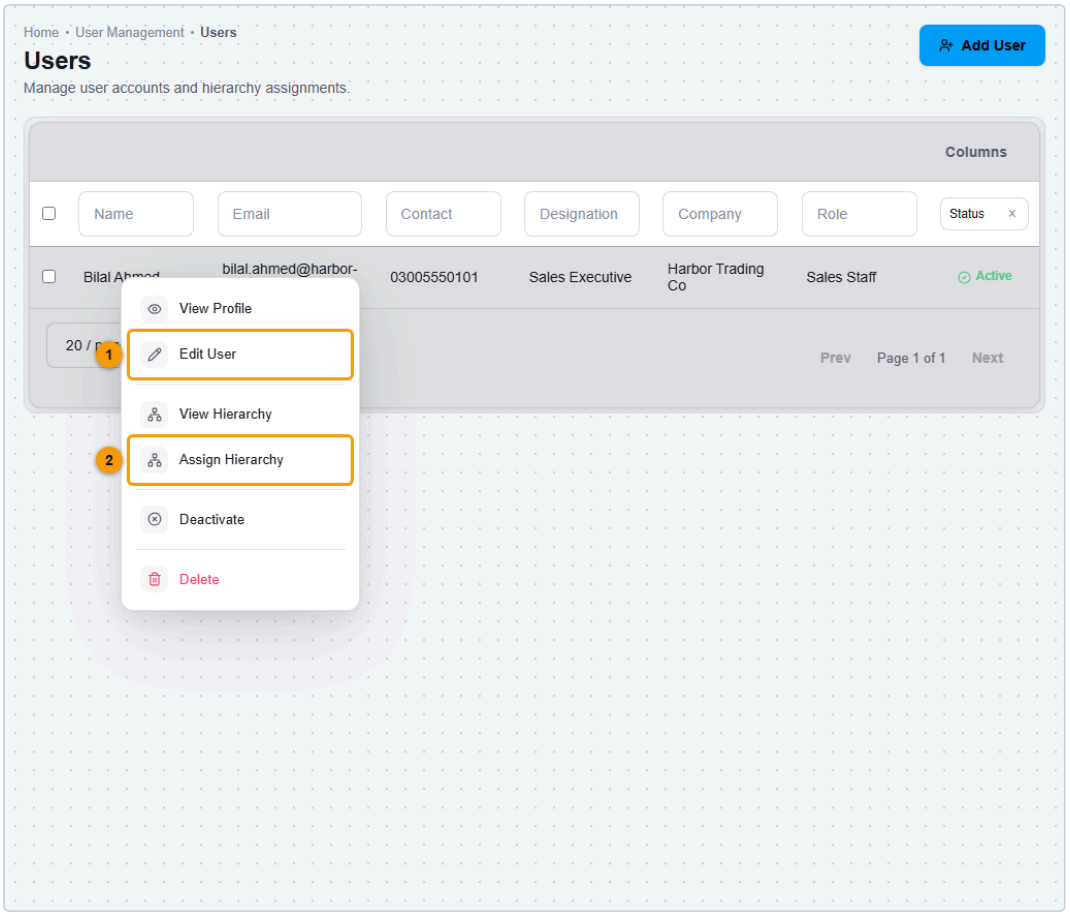
Plan, role and place: how they fit together

- **Plan** is what your business is entitled to. It decides which apps and features exist for the business.
- **Role** (permissions) is what a staff member may do inside those features.
- **Hierarchy** is the place in your company tree where the staff member works, for example *Main Branch / Head Office / Sales Counter*. See Your company and branches.

A staff member needs all three: a plan that includes the feature, a role that allows the action, and a place in your hierarchy.

Open the user's menu

1. Open **User Management**, then **Users**.
2. Right-click the person.



Edit User (1) and Assign Hierarchy (2).

The menu has **View Profile**, **Edit User**, **View Hierarchy**, **Assign Hierarchy**, **Deactivate** and **Delete**.

Edit the details

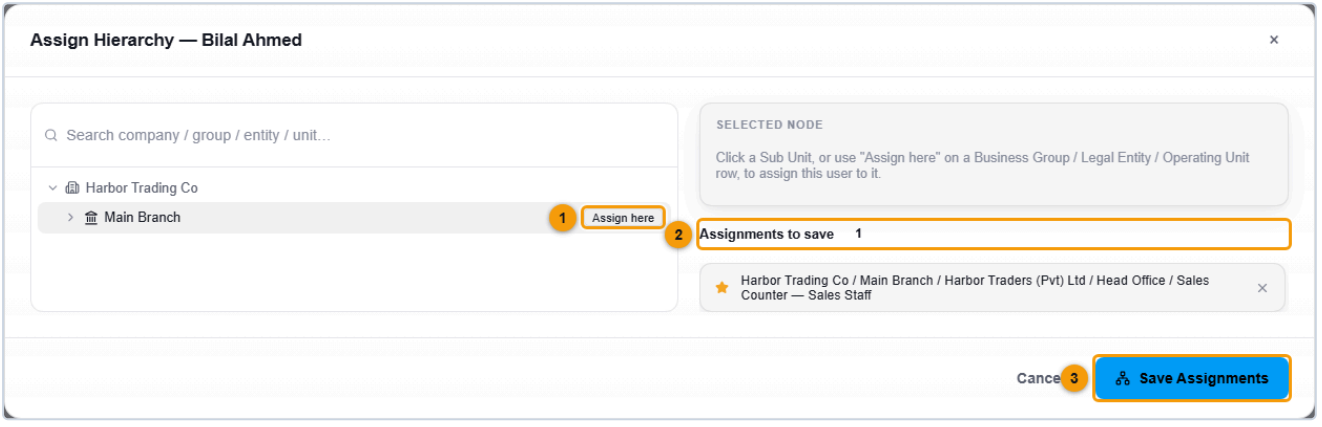
1. Choose **Edit User** (1).
2. Change the name, contact number, **Department**, **Designation** or join date. Leave **Password** empty to keep the current password.
3. Use the **Active** setting to switch the account on or off.

The basic details. App access shows which apps the person can open.

4. Use the **Access** button next to an app to grant or remove that app for this person.
5. Use the buttons at the bottom of the page to continue and save.

Move someone to another branch or unit

1. Choose **Assign Hierarchy** (2).
2. In the tree, click a **Sub Unit**, or click **Assign here** (1) on a Business Group, Legal Entity or Operating Unit row.
3. Check **Assignments to save** (2). Each row shows the full place and the role, and the star marks the primary place.
4. Click **Save Assignments** (3).



Assign here (1), Assignments to save (2) and Save Assignments (3).

Use **View Hierarchy** to see where a person is placed without changing it.

Important notes

- Changing a role, a place or an app does not change your plan. If a feature is not on your plan, no role can unlock it.
- **Deactivate** and **Delete** are in the same menu. Check the person before you use either.

Related guides

- Add a user
- Roles and permissions
- How access works

Billing & Plans

Your plan, renewals and cancellation

Your plan, usage and billing period

See which plan you are on, when it renews and how much of your limits you have used.

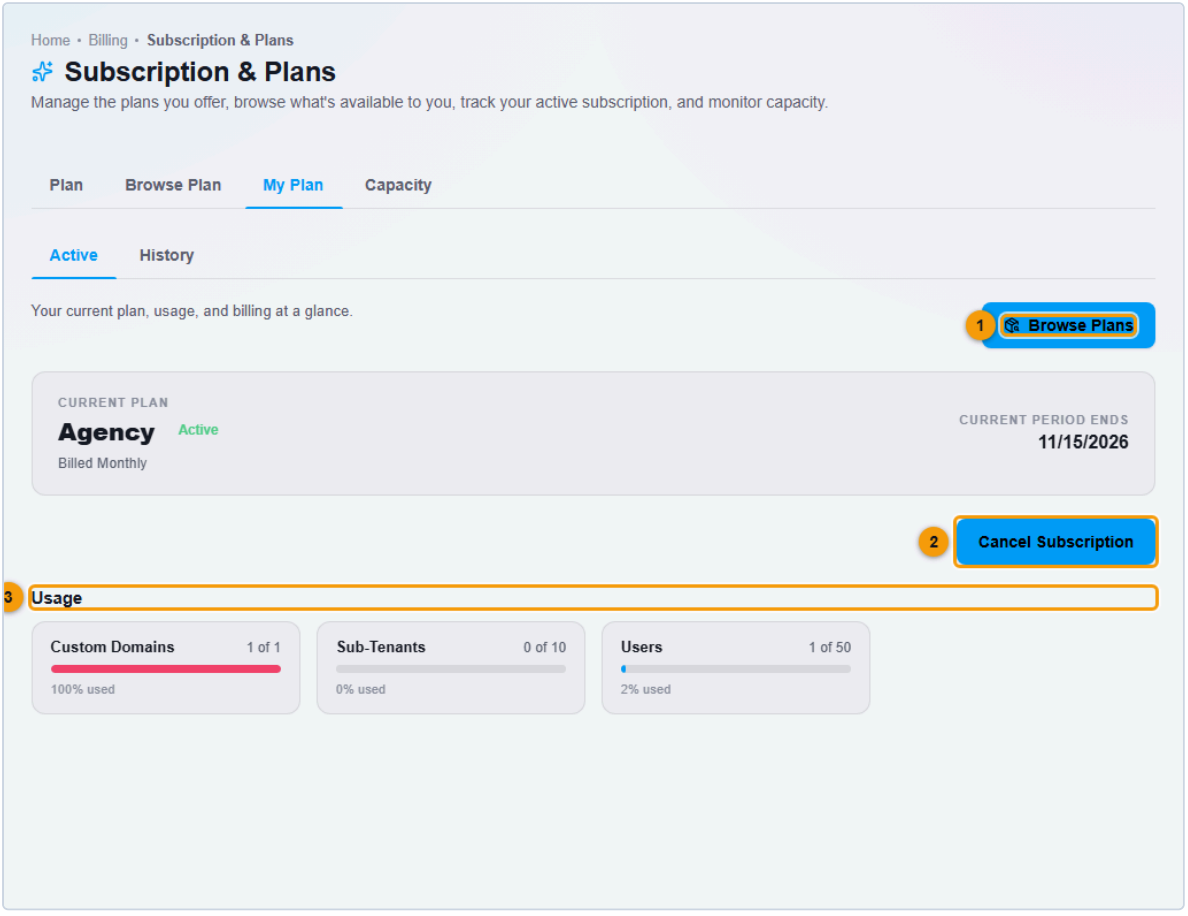
Plan: All plans

What this does

The **My Plan** page shows the plan your business is on, how you are billed, when the current period ends, and how much of your plan limits you have used.

Steps

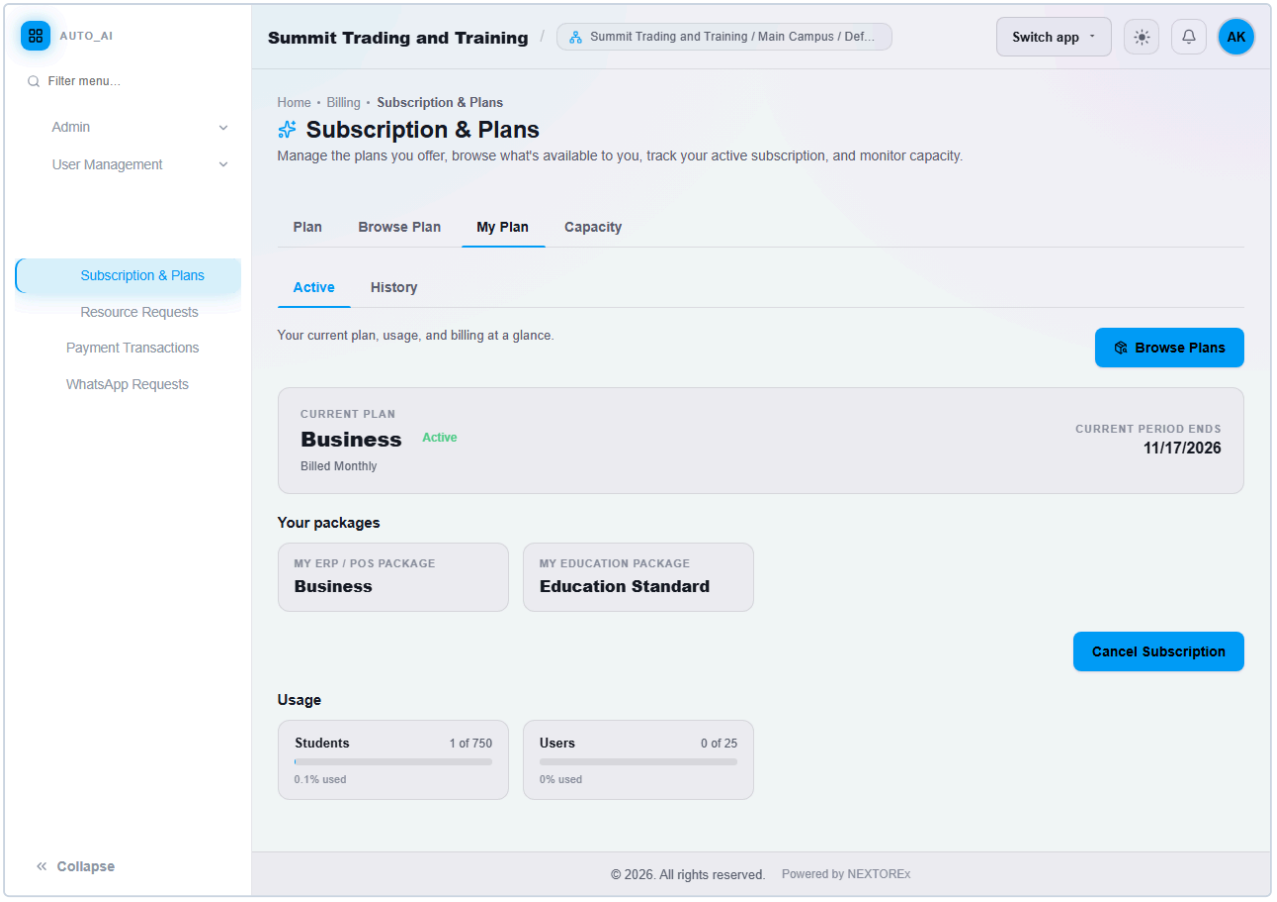
1. Open **Billing**, then **Subscriptions**, then **Subscription & Plans**.
2. Click the **My Plan** tab, then **Active**.



Browse Plans (1), Cancel Subscription (2) and Usage (3).

1. Read the card **Current plan**. It shows the plan name, its status (for example **Active**), how you are billed (**Billed Monthly** or **Billed Yearly**) and **Current period ends**, the date your plan renews or ends.

2. Under **Usage**, check the limits that apply to your plan. For example, **Users 1 of 50** shows how many users you have added out of how many your plan allows. Plans that include extra features also show limits such as **Custom Domains** and **Sub-Tenants**.
   If your account has more than one application, **Your packages** lists the package you have for each one, for example **My ERP / POS Package** and **My Education Package**. Limits of the same kind add up across packages. Education also shows **Students** under **Usage**, for example **Students 200 of 200**.



An account with the Business ERP/POS package and Education Standard. Usage shows Students and Users.

3. Click the **History** tab to see your plan history.

What happens next

If you need a different plan, click **Browse Plans** (1) to see the plans available to you.

Important notes

- Plans can be billed **monthly** or **yearly**, in **PKR** or **USD**.
- Staff cannot add more users than your plan allows.
- You may not see every tab. Some tabs are only for the business that offers plans to its own clients.

Related guides

- Cancel or keep your subscription
- Add a user

- Education plans, limits and combining apps

Browse plans and change your plan

See the plans available to your account with their prices and limits, and move to a bigger or smaller plan. Your billing currency and period stay the same.

Plan: All plans

What this does

Browse Plan shows the plans you can choose from. Each card shows the price per month, the price per year, and the limits of the plan, such as the number of users. All prices are in the currency of your subscription, and a note above the cards names it, for example **Prices in PKR**. Your own plan is marked **Current Plan**. You use the same page to move to a bigger plan or a smaller one.

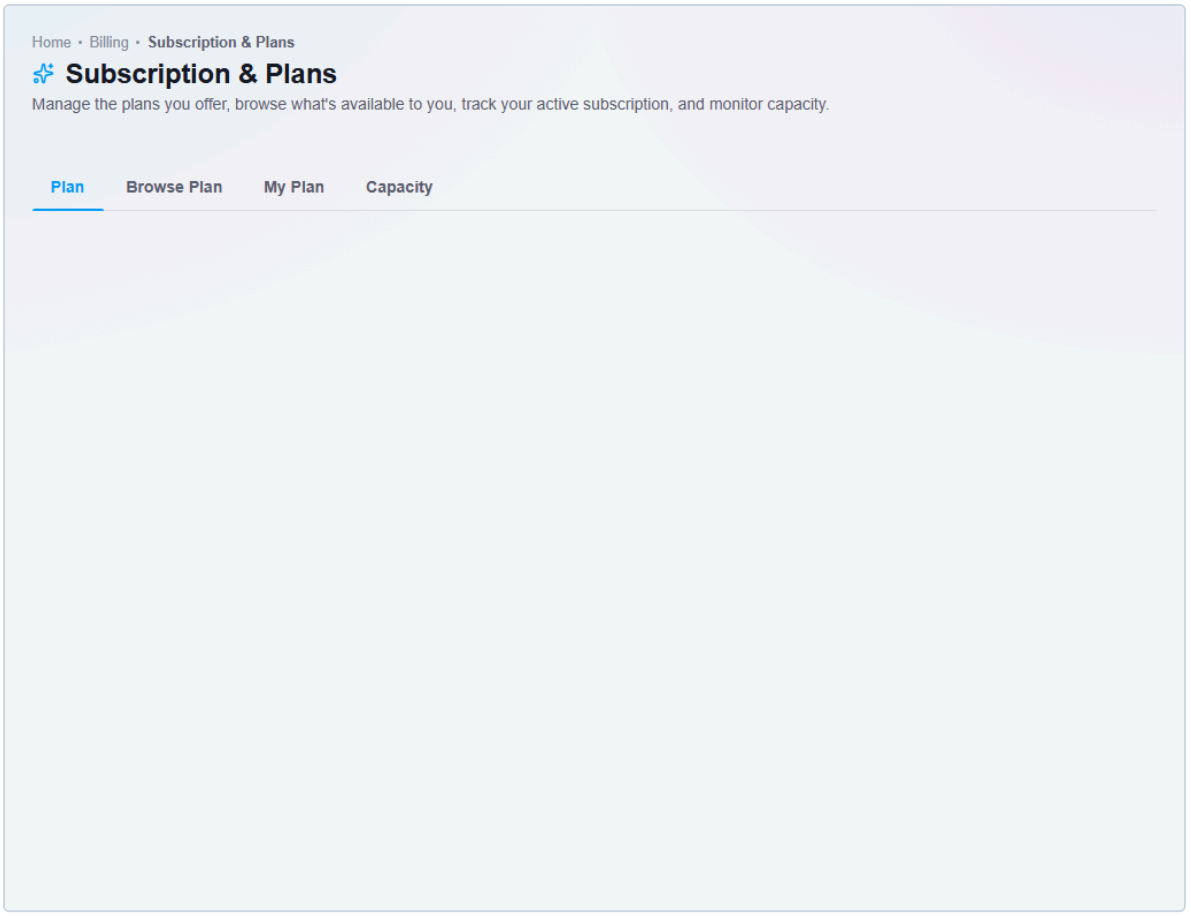
The plans are grouped by application: **ERP / POS**, **CRM** and **Education**. Each application has its own packages, and a package of one application never changes the package of another. If you already have a package for an application, its section says **You have a package for this app**.

Before you start

You need permission to manage your subscription, which is normally the business owner or an administrator.

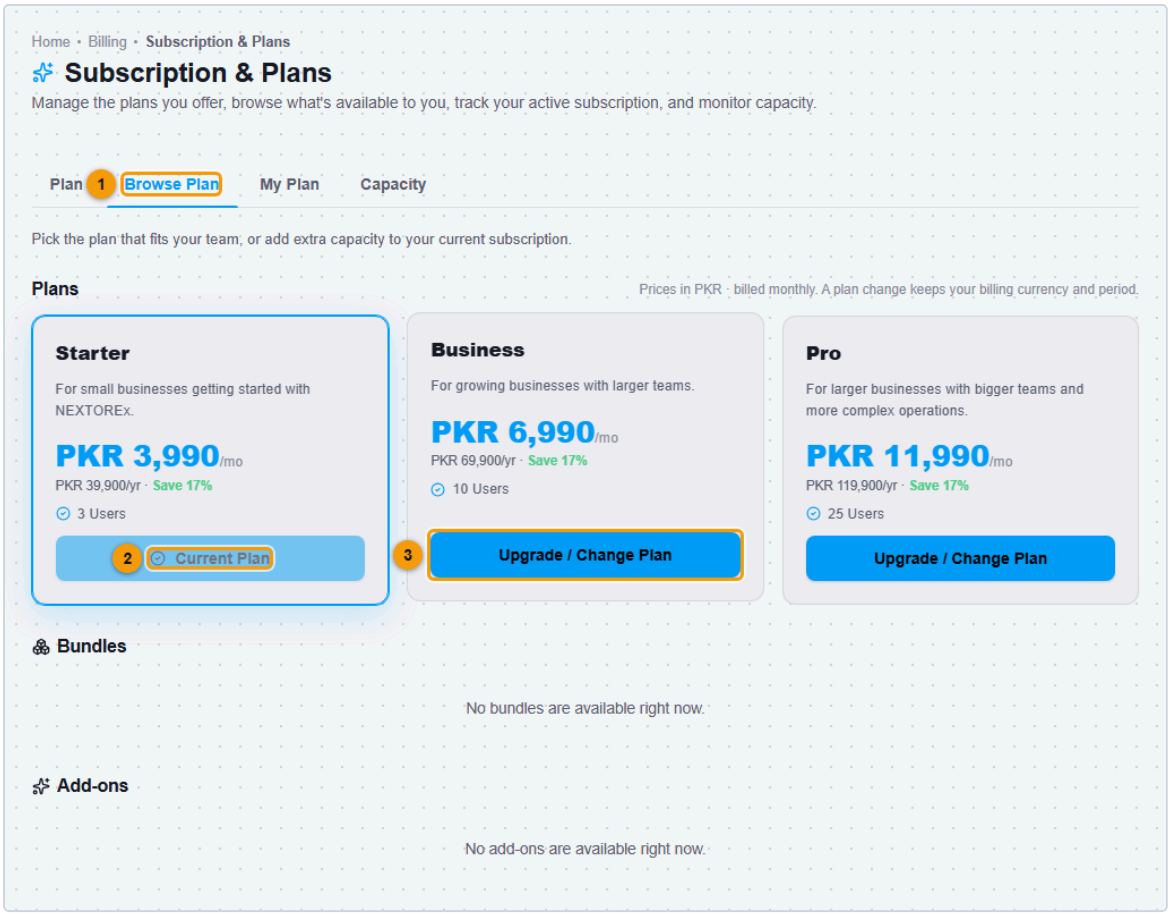
Steps

1. In the left menu, open **Billing**, then **Subscription & Plans**.



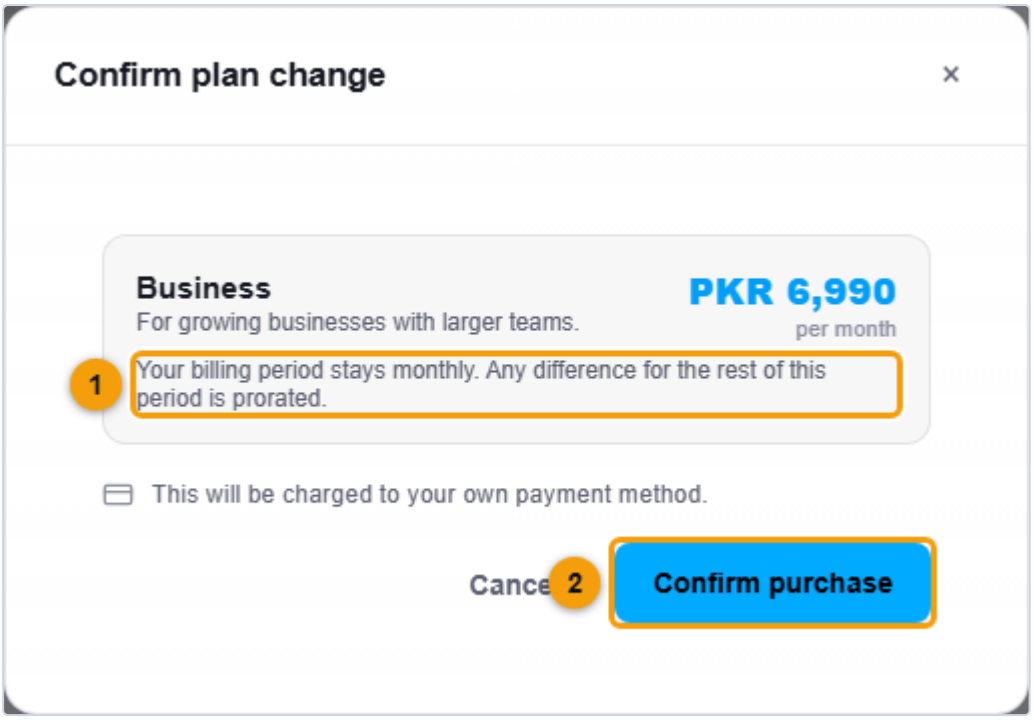
Plan, Browse Plan, My Plan and Capacity.

2. Click the **Browse Plan** tab (1).



Browse Plan (1), your Current Plan (2) and Upgrade / Change Plan (3). Prices are in PKR on this account.

3. Compare the cards. Each card shows the monthly price, the yearly price with the saving, and the number of users. A client business sees only Starter, Business and Pro.
4. Click **Upgrade / Change Plan** (3) on the plan you want. The same button is used on a smaller plan. For an application you do not have yet, the button says **Add this app**, and the new package is added beside your existing ones.
5. The **Confirm plan change** window opens. It shows the plan, its price for your billing period, and a line (1) that says your billing period stays the same, for example monthly. You cannot switch between monthly and yearly in this window.



Billing period note (1) and Confirm purchase (2).

6. Click **Confirm purchase** (2) to go ahead, or **Cancel** to stay on your plan.

What happens next

- **A plan that costs less than your current one** takes effect at once. The message **Plan changed successfully** appears and the card now shows **Current Plan**. Your limits and the features of the new plan apply immediately.
- **A plan that costs more** needs a payment for the rest of the current period. The window changes to **Confirm payment** and shows the amount, for example *PKR 3,096.77*. The plan does not change until the payment is made. If the window says that no online payment method is available, ask the person who manages your account to set one up.
- Your people keep their roles. What they can open follows the features of your plan, so a feature that the new plan does not include is hidden until you move to a plan that has it again.

Important notes

- Your billing currency and period are fixed when you subscribe. A plan change keeps them, so every price on this page is in that one currency.
- Yearly billing costs less over the year than twelve months of monthly billing. The card shows the saving.
- An agency can also choose a plan for a client business. See Choose a plan for a client. An agency can give a client only Starter, Business or Pro.
- To stop a plan at the end of the period instead of changing it, see Cancel or keep your subscription.
- The Education packages (Essentials, Standard and Campus) and how they combine with ERP/POS and CRM are explained in Education plans, limits and combining apps.

- Add-ons and bundles appear on this page when your account has them. Otherwise it says none are available.

Related guides

- Your plan, usage and billing period
- Cancel or keep your subscription
- Education plans, limits and combining apps
- Your trial

Cancel or keep your subscription

Stop your plan from renewing at the end of the period, or change your mind and keep it.

Plan: All paid plans

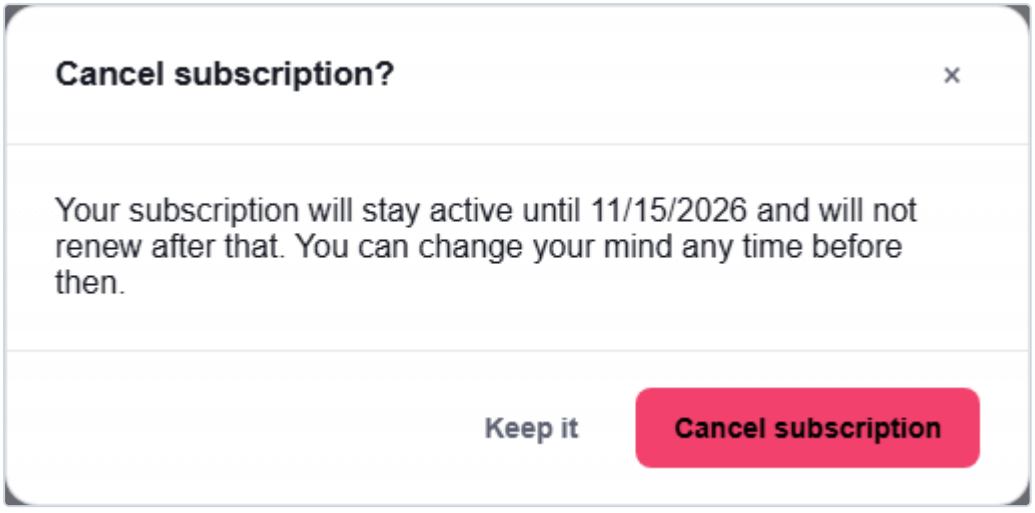
What this does

You can stop your plan from renewing. Your plan stays active until the end of the period you have already paid for. Until that date you can change your mind.

Steps

To cancel:

1. Open **Billing**, then **Subscriptions**, then **Subscription & Plans**.
2. Open the **My Plan** tab.
3. Click **Cancel Subscription**.

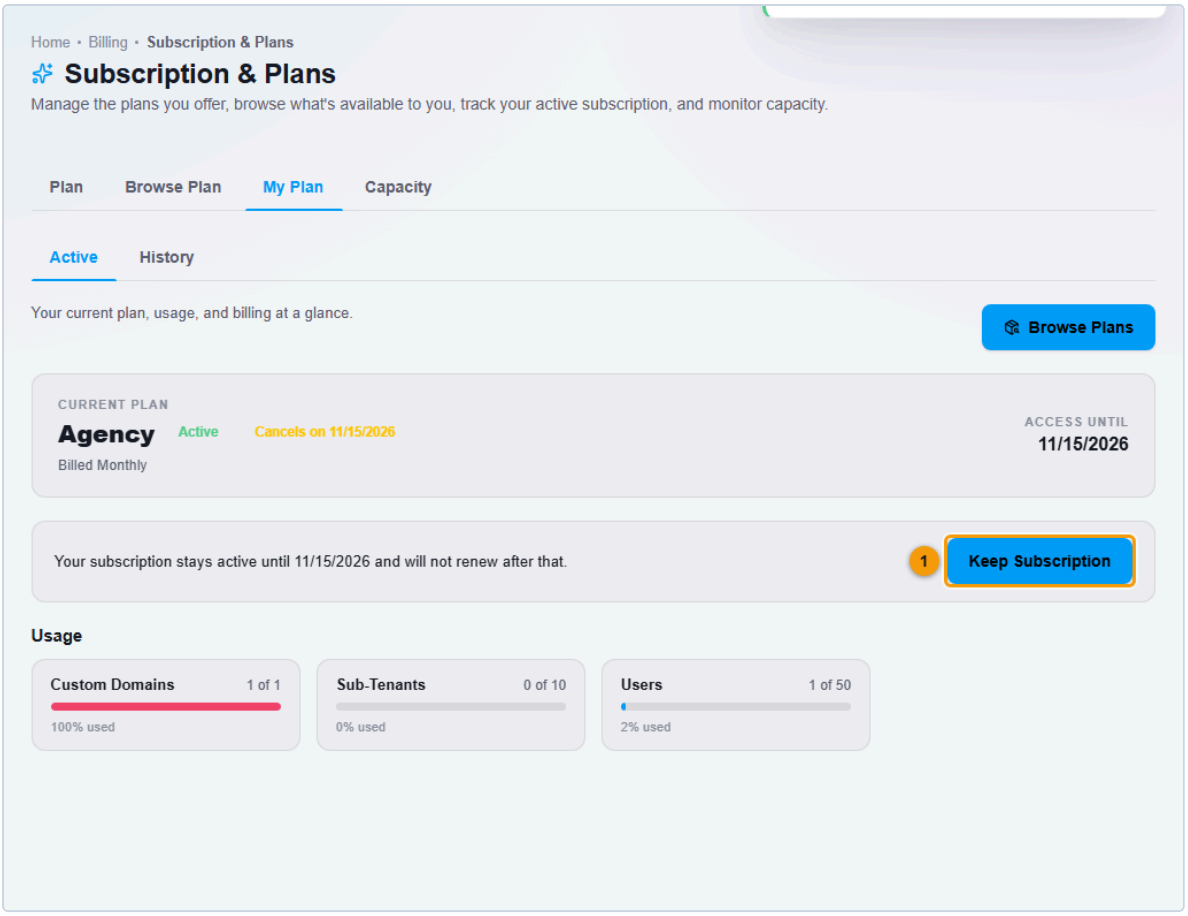


The message tells you the date your access continues until.

4. Read the message. It says your subscription stays active until the date shown and does not renew after that.
5. Click **Cancel subscription** to confirm, or **Keep it** to go back.

To keep your subscription after cancelling:

1. Open the **My Plan** tab again. The plan now shows **Cancels on** and the date.
2. Click **Keep Subscription**.



Keep Subscription (1) undoes the cancellation.

What happens next

- After you cancel, you keep full access until the date under **Access until**. The plan will not renew after that.
- After you click **Keep Subscription**, the plan continues and renews as normal.

Important notes

- Read the Refund and Cancellation Policy for what happens to payments you have already made.

Related guides

- Your plan, usage and billing period

Demo & Trial

How Demo workspaces and Trials work

How the Demo works

What happens after you ask for a demo, how you get into your demo workspace, and what happens when it ends.

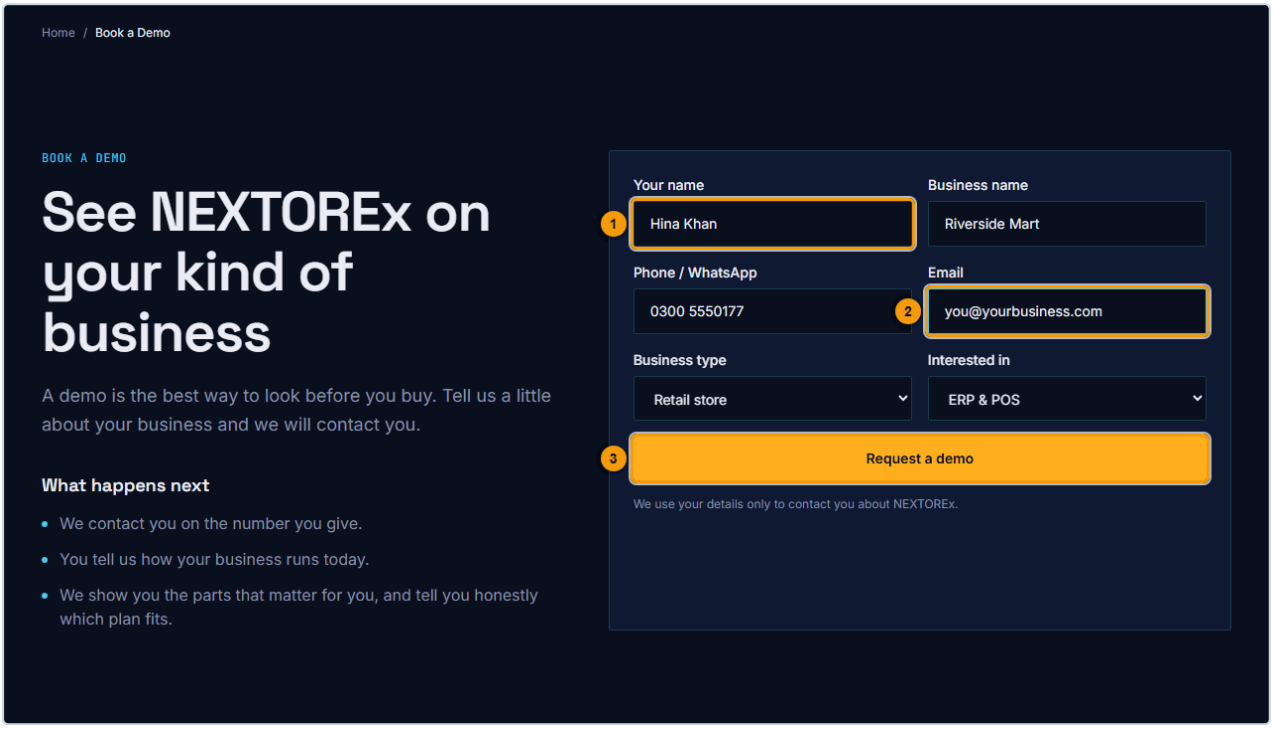
Plan: Demo

What this does

A Demo is a private workspace where you can look around NEXTOREx before you buy. It is not a paid plan and no payment is needed. A Demo is different from a Trial. See Demo or Trial?.

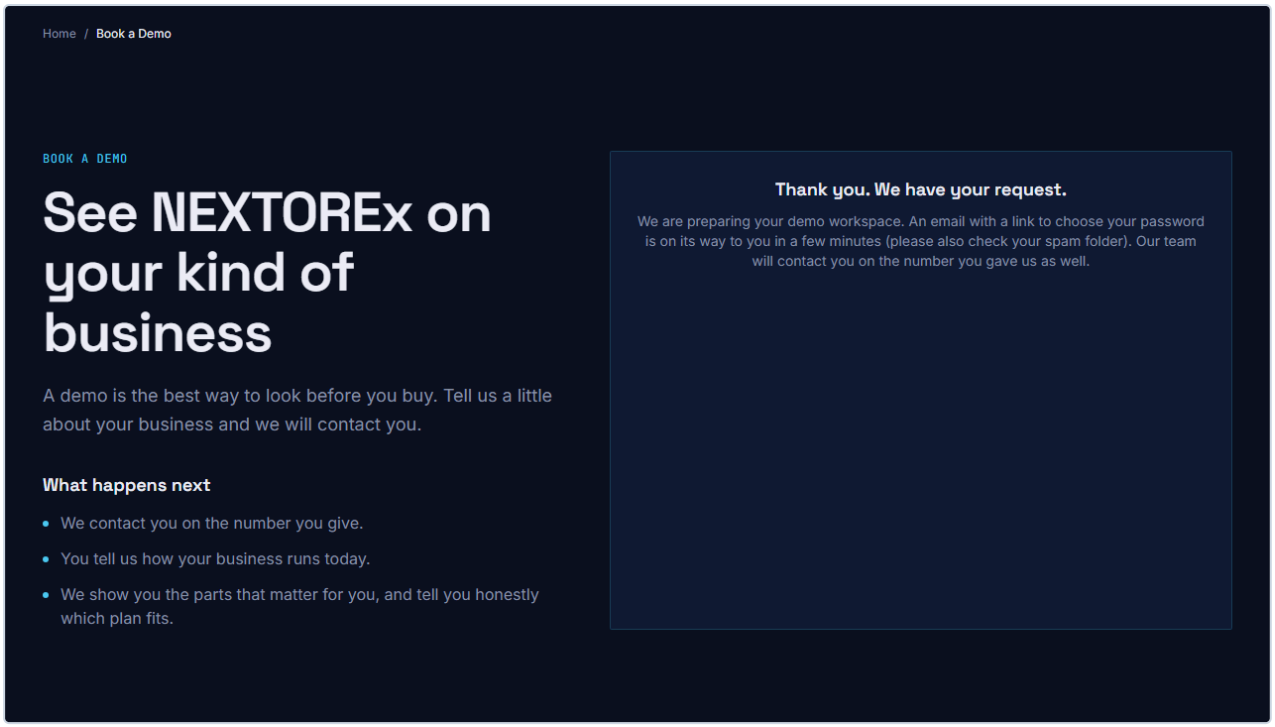
Steps

1. Open the Book a Demo page on the NEXTOREx website.
2. Fill in your name, business name, phone, email, business type and what you are interested in (1, 2). Click **Request a demo** (3).



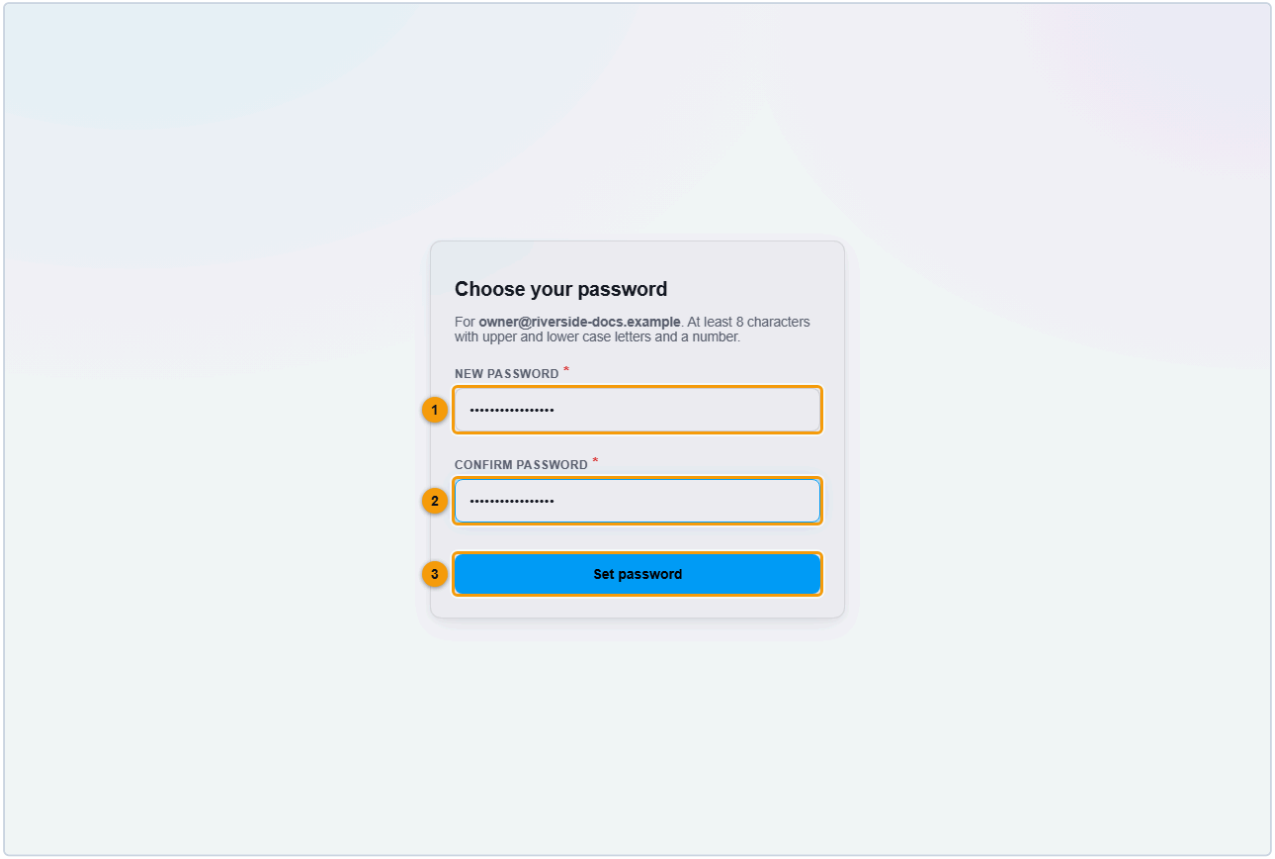
Your name (1), email (2) and Request a demo (3).

3. The page says *Thank you. We have your request.* Your request is saved with our team as a lead, and your demo workspace is prepared for you in the background.



Your demo workspace is being prepared.

4. You receive an email with a link to choose your password.
5. Open the link. On **Choose your password**, type a **New password** (1), type it again (2) and click **Set password** (3). The password needs at least 8 characters with upper and lower case letters and a number.

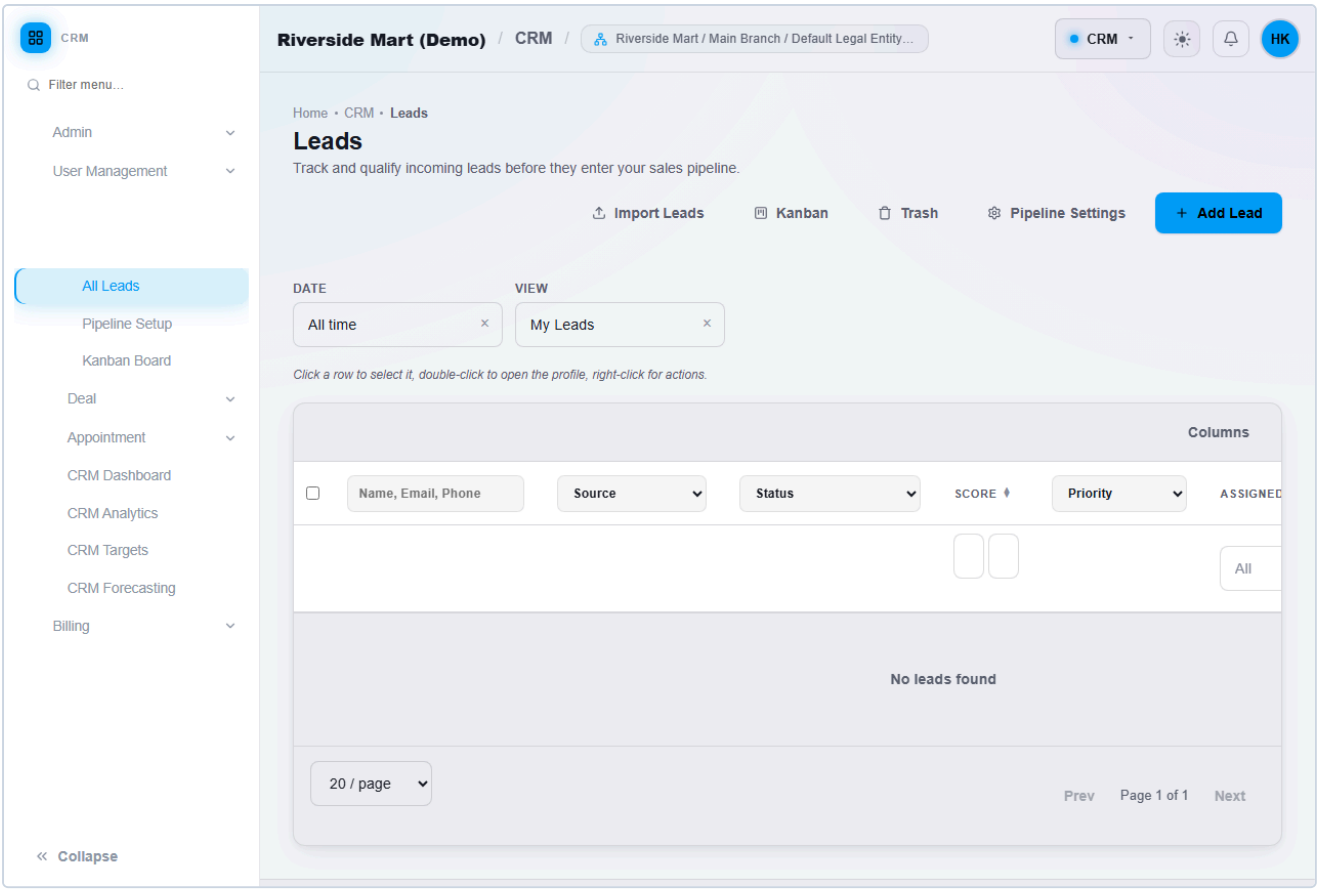


New password (1), confirm password (2) and Set password (3).

6. You are taken to the sign-in page. Sign in with your email and the new password. If the page shows a short message about your session, ignore it and sign in.

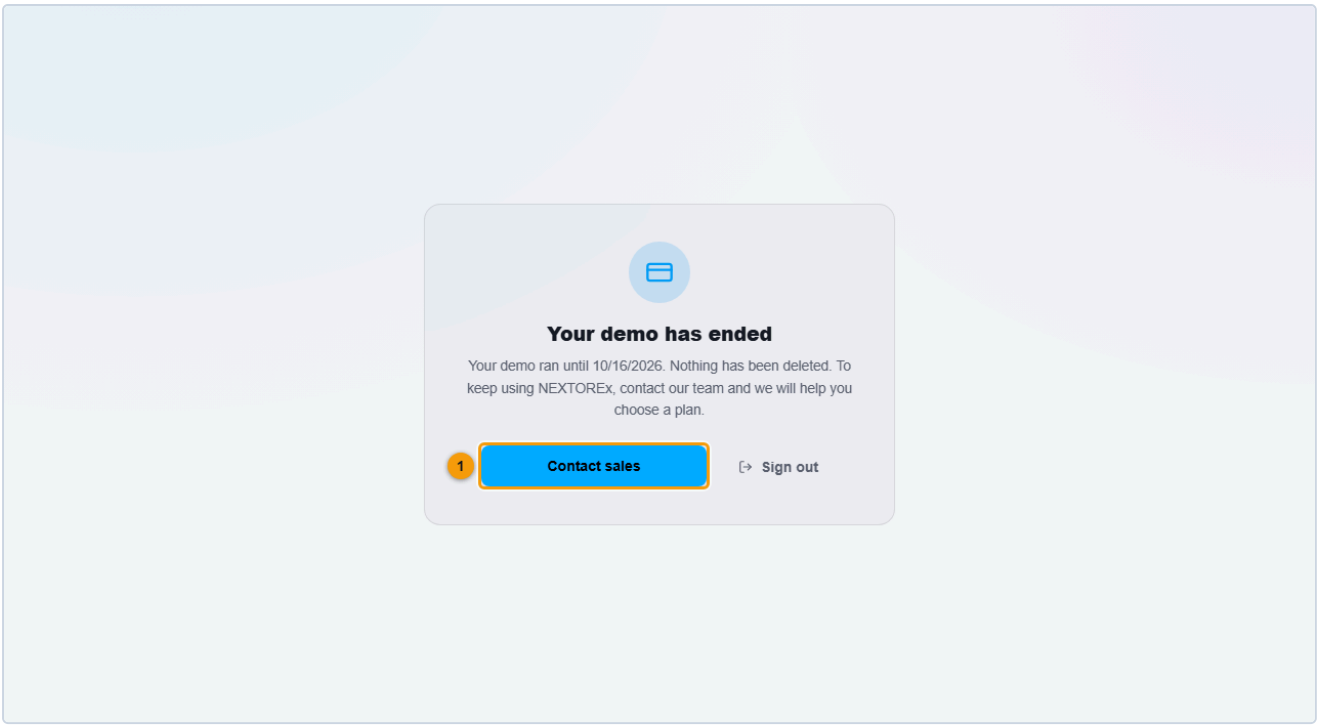
What happens next

You land in your demo workspace. Its name ends with **(Demo)**. You can use it without paying for a limited time. The length is set by NEXTOREx.



Your own private workspace. It starts empty.

When the time ends, your access is paused and you see the **Your demo has ended** message. Nothing is deleted. Click **Contact sales** (1) and we will help you choose a plan.



Contact sales (1) or sign out.

Important notes

- The link in the email is for choosing your password. If it does not work, ask our team for a new one.
- You can have one demo per email address, and requests are limited per day.
- A Demo does not renew and cannot be paid for. To keep using NEXTOREx you need a plan.
- A Demo is not a Free Trial. NEXTOREx does not offer a public Free Trial.

Related guides

- Demo or Trial?
- Welcome to NEXTOREx

Demo or Trial?

The difference between a Demo workspace and a Trial of a plan.

Plan: All

What this does

NEXTOREx has two ways to start without paying at the beginning. They are not the same.

	Demo	Trial
What it is	A private workspace to look around	Your real business on a real plan, without paying yet
How you get it	You ask on the Book a Demo page	You start it from **Browse Plan** on a plan that offers one, or NEXTOREx starts it for you
Payment	None	None until you activate
When it ends	Access is paused. Contact Sales to continue	Access is paused until you activate the plan
Your data	Kept	Kept

Steps

- To ask for a Demo, see How the Demo works.
- To see how a Trial works for your business, see Your Trial.

Important notes

- A Trial is only available on plans where NEXTOREx has switched trials on. It is not advertised on the public website.

Related guides

- How the Demo works
- Your Trial

Your Trial

See how many days of your Trial are left, and activate your plan when you are ready.

Plan: Plans with a Trial

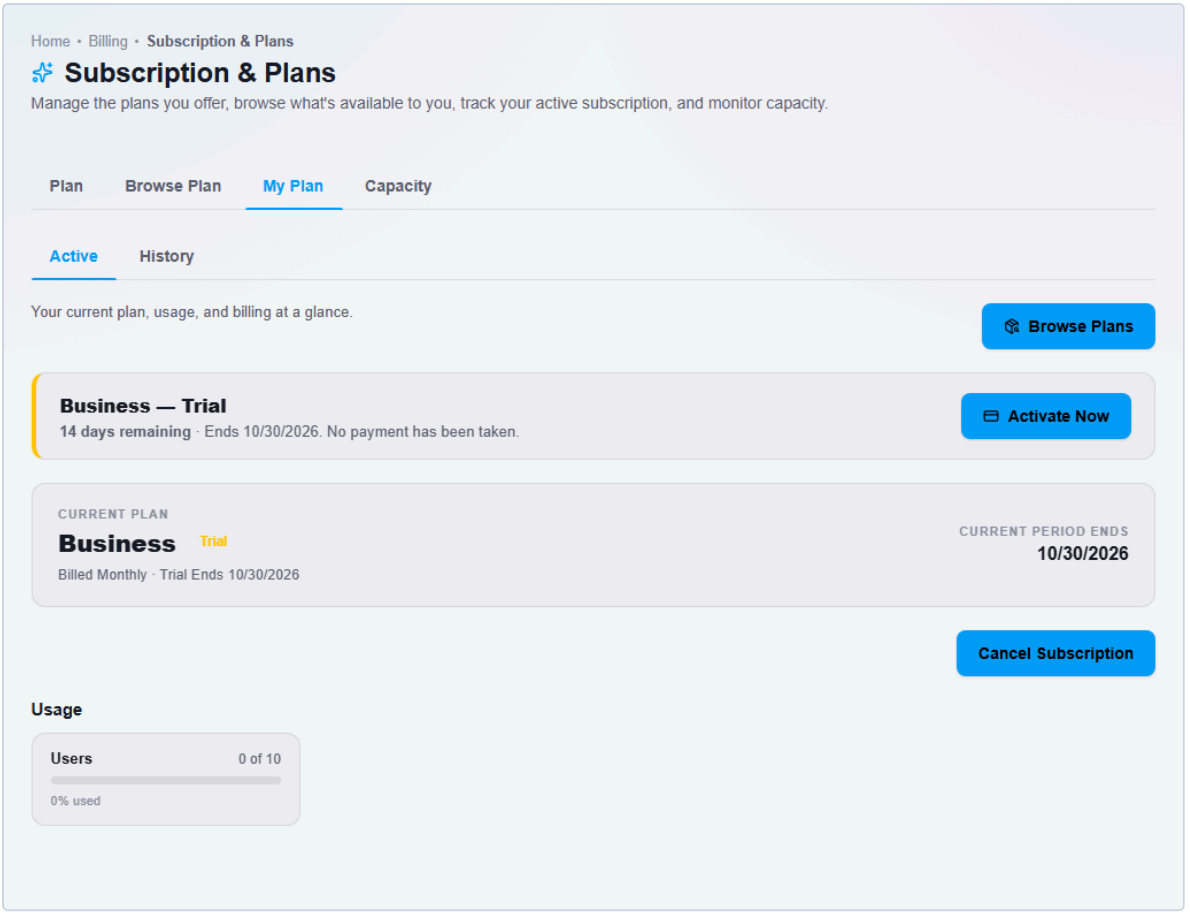
What this does

A Trial lets you use a plan before you pay. While it is running, no payment is taken. When you are ready, you activate the plan to keep using it.

Steps

To check your Trial:

1. Open **Billing**, then **Subscriptions**, then **Subscription & Plans**.
2. Open the **My Plan** tab.



The Trial banner shows the days remaining and Activate Now.

1. Read the banner at the top. It shows the plan and trial, for example **Business — Trial**, how many **days remaining** there are, the date it ends, and the note **No payment has been taken**.

To activate your plan:

1. Click **Activate Now**. NEXTOREx takes you to **Browse Plan**. Every plan card shows **Activate this plan**.
2. Click **Activate this plan** on the plan you want to keep, and follow the steps on screen. See Browse plans and change your plan.

What happens next

- If you activate before the Trial ends, you keep using the plan.
- If the Trial ends and you have not activated, access is paused and you see a message that your trial has ended. Your data is kept.
- A business can have one Trial.
- A Trial moves to a paid plan only when you activate it. Until then no payment is taken.

Important notes

- Your Trial is a real plan, so the same limits apply, for example the number of users.

Related guides

- Demo or Trial?
- Your plan, usage and billing period

Turn on a Trial for a plan (platform owner)

For the NEXTOREx platform owner: set how many trial days a plan offers.

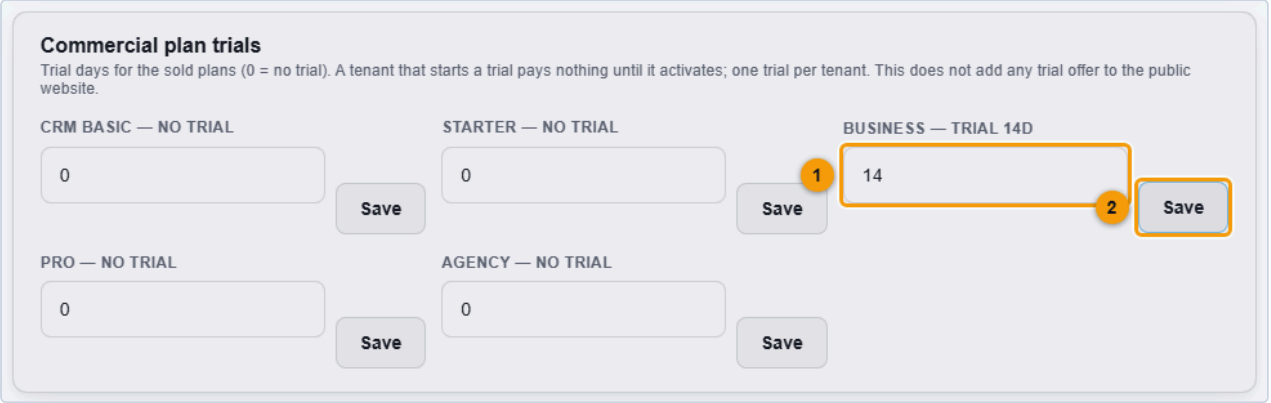
Plan: Platform owner only

What this does

This guide is for the NEXTOREx platform owner. It switches a Trial on for a plan by giving it a number of trial days. With 0 days, the plan has no Trial.

Steps

1. Sign in as the platform owner.
2. Open **Billing**, then **Plans**.
3. Scroll to the box **Commercial plan trials**. It has one box for each plan: **CRM Basic**, **Starter**, **Business**, **Pro** and **Agency**.



Trial days for the Business plan (1) and Save (2).

4. Type the number of days in the plan's box (1). Use **0** for no trial.
5. Click **Save** (2) next to it.

What happens next

The label above the box changes, for example from *BUSINESS: NO TRIAL* to *BUSINESS: TRIAL 14D*, and a confirmation says the trial was set.

A business that starts a Trial on this plan pays nothing until it activates. Each business can have only one trial.

Important notes

- This does not add a Trial offer to the public website.

Related guides

- Grant a Trial to a business (platform owner)
- Your Trial

Grant a Trial to a business (platform owner)

For the NEXTOREx platform owner: start a Trial on a plan for a business, without payment.

Plan: Platform owner only

What this does

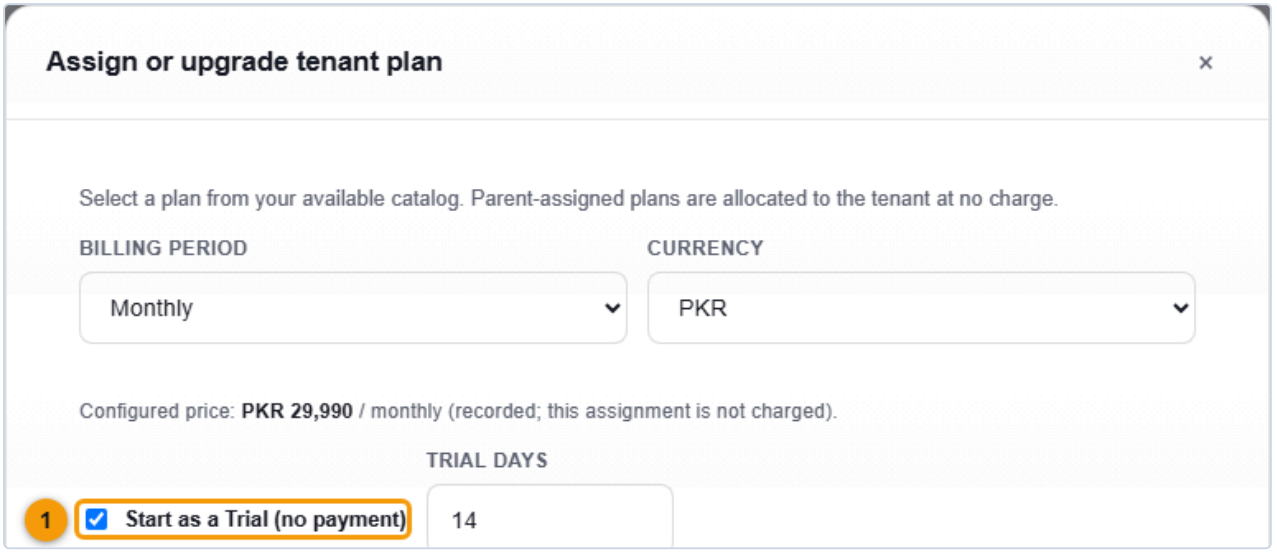
This guide is for the NEXTOREx platform owner. It starts a Trial of a plan for a business without taking payment.

Before you start

- Turn on a Trial for the plan.

Steps

1. Open **Admin**, then **Tenants**, and open the business.
2. Click the **Plan** tab, then **Assign Plan**. The **Assign or upgrade tenant plan** window opens.
3. Tick **Start as a Trial (no payment)** (1). A **Trial days** box appears.



Tick Start as a Trial (no payment).

4. Click **Start Trial** on the plan you want.

What happens next

A message confirms the trial has started. The **Plan** tab shows the plan with a **Trial** label, the period dates and *Trial ends on* the end date.

The business sees the Trial on its **My Plan** page with the days remaining and an **Activate Now** button. See Your Trial.

To give a plan without a Trial, leave **Start as a Trial** unticked and click **Select Plan**. The window says the assignment is recorded and is not charged.

Important notes

- Each business can have one Trial.

Related guides

- Turn on a Trial for a plan (platform owner)
- Your Trial

White Label

Your logo, colours and custom domain

Brand NEXTOREx with your logo and colours

Use Theme Studio to add your brand name, logo, favicon, colours and fonts.

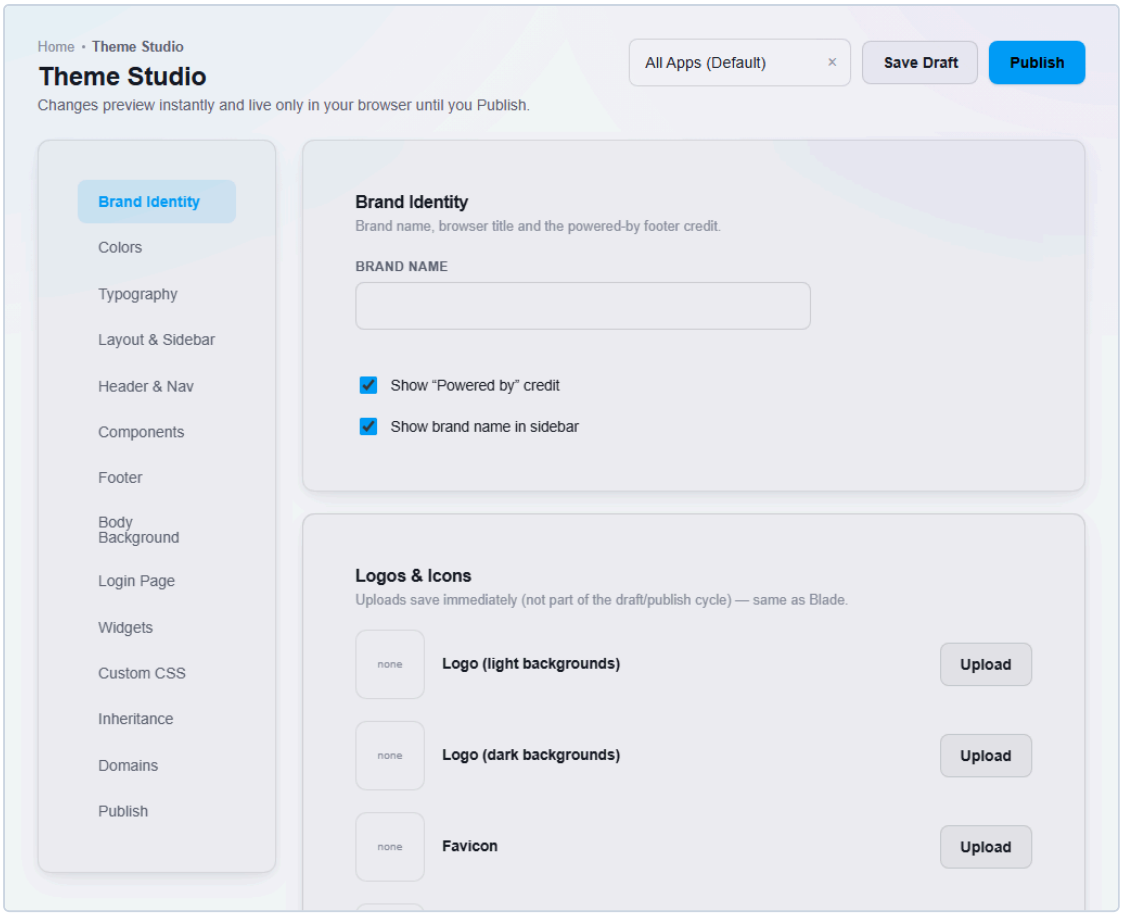
Plan: Agency

What this does

Theme Studio lets you make the app look like your own: your brand name, logo, favicon, colours and fonts. You can preview changes before you publish them.

Steps

1. Click your profile picture at the top right, then click **Theme Studio**. You see it only if your plan includes White Label.
2. On the left, choose a section:
   - **Brand Identity**: your **Brand name**, and switches for **Show "Powered by" credit** and **Show brand name in sidebar**. Below it, **Logos & Icons** has places to upload your **Logo (light backgrounds)**, **Logo (dark backgrounds)** and **Favicon**.
   - **Colors**: your **Primary** colour, which drives buttons, badges and links, plus **Secondary**, **Success**, **Danger**, **Warning** and **Info**, and sidebar colours.
   - **Typography**: **Font family**, **Base size** and **Text color**.
   - Other sections: **Layout & Sidebar**, **Header & Nav**, **Components**, **Footer**, **Body Background**, **Widgets**, **Custom CSS**, **Inheritance**, **Domains** and **Publish**.



Brand Identity is the first section. Use Save Draft and Publish at the top right.

3. Make your changes. They show right away in your browser as a preview.
4. Click **Save Draft** to keep your work, or **Publish** to make the changes live for everyone who uses your workspace.

What happens next

After you publish, your brand shows in the app for your workspace. Logo and favicon uploads save as soon as you upload them. They are not part of the draft and publish steps.

Important notes

- The **All Apps (Default)** box at the top lets you choose which app the theme applies to.
- **Inheritance** lets a client business start from your published branding instead of its own.
- Branding changes how the app looks. Do not assume every email, every sign-in page and every report carries your branding. Check the places that matter to you before you tell clients.
- To use your own web address, see Connect your own domain.

Related guides

- Connect your own domain
- Create a client business

Connect your own domain

Point your own web address to your NEXTOREx workspace and prove you own it.

Plan: Agency (1 custom domain)

What this does

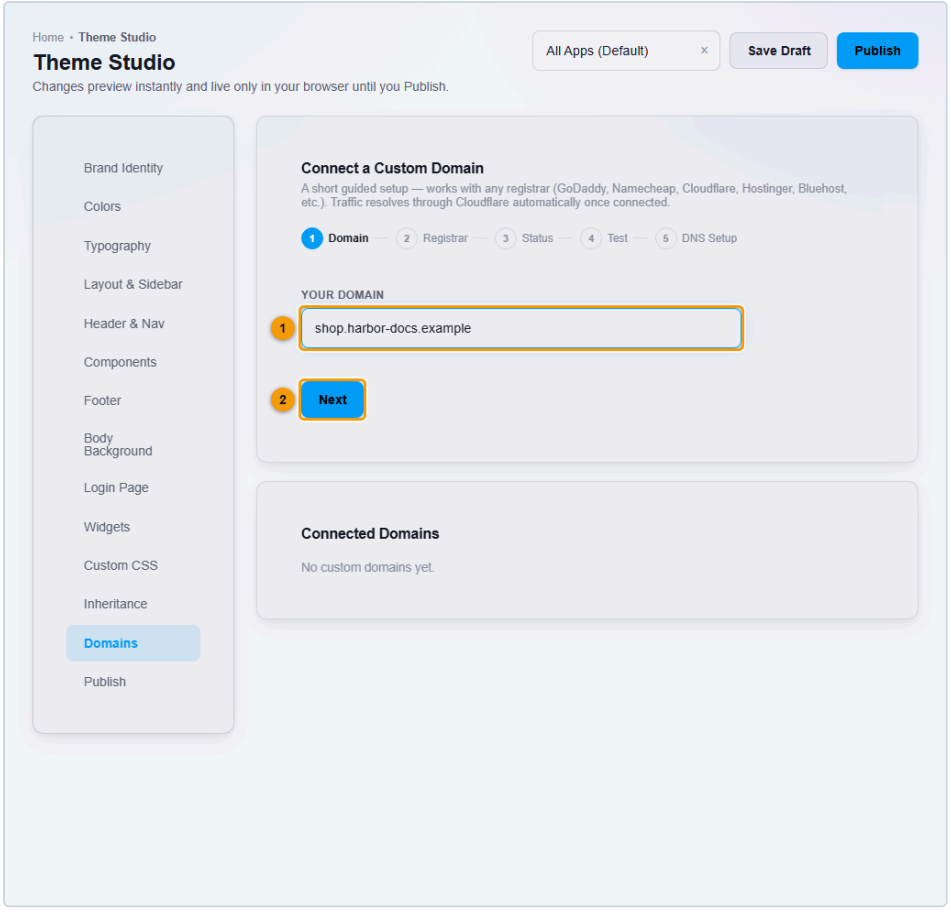
You can use your own web address, for example *shop.yourcompany.com*, for your workspace. NEXTOREx first checks that you really own the address. This is called ownership verification.

Before you start

- You need an Agency plan. It includes one custom domain.
- You need access to the place where your domain's DNS records are managed. This is your registrar or DNS provider, for example GoDaddy, Namecheap, Hostinger, Cloudflare or Bluehost.

Steps

1. Open **Theme Studio**, then **Domains**. The page is called **Connect a Custom Domain** and shows five steps: **Domain**, **Registrar**, **Status**, **Test** and **DNS Setup**.
2. Enter **Your domain** (1) and click **Next** (2).



Enter the domain you own.

3. Choose where the domain is registered, or **Other / I'll do it myself**. This only tailors the instructions. Click **Connect**.

4. The domain is added under **Connected Domains** and shows *Verify ownership*.
5. Click **Setup Guide**. It shows two DNS records to add at your registrar or DNS provider:
   - A **TXT** record. Its host starts with `_nextorex-challenge`. Its value begins with `nextorex-site-verification=`. This proves you own the domain.
   - A **CNAME** record for your domain, pointing to the value shown.

   Click **Copy value** next to each, then add them in your DNS control panel exactly as shown.
6. When the records are saved, come back and click **Verify**.

What happens next

The **Connected Domains** list shows the state of each domain. While the TXT record is missing it says to add the ownership record and check again. A domain only goes live after ownership is verified and the CNAME is correct.

Other buttons on the domain:

- **Make Primary** makes it your main address.
- **Remove** disconnects it.

Important notes

- Copy the values from your own Setup Guide. Do not type them from memory.
- DNS changes can take time to appear. If **Verify** does not succeed straight away, wait and try again.
- A domain works only after you prove you own it and the records match. NEXTOREx does not promise a secure (SSL) certificate automatically for your domain, so test the address before you tell clients to use it.
- You can only connect as many domains as your plan allows. On Agency, that is one.

Related guides

- Brand NEXTOREx with your logo and colours

Layout, header, footer and background

Change how the app is laid out: the sidebar, card and button style, header and sidebar colours, footer text and the page background.

Plan: Plans with White Label

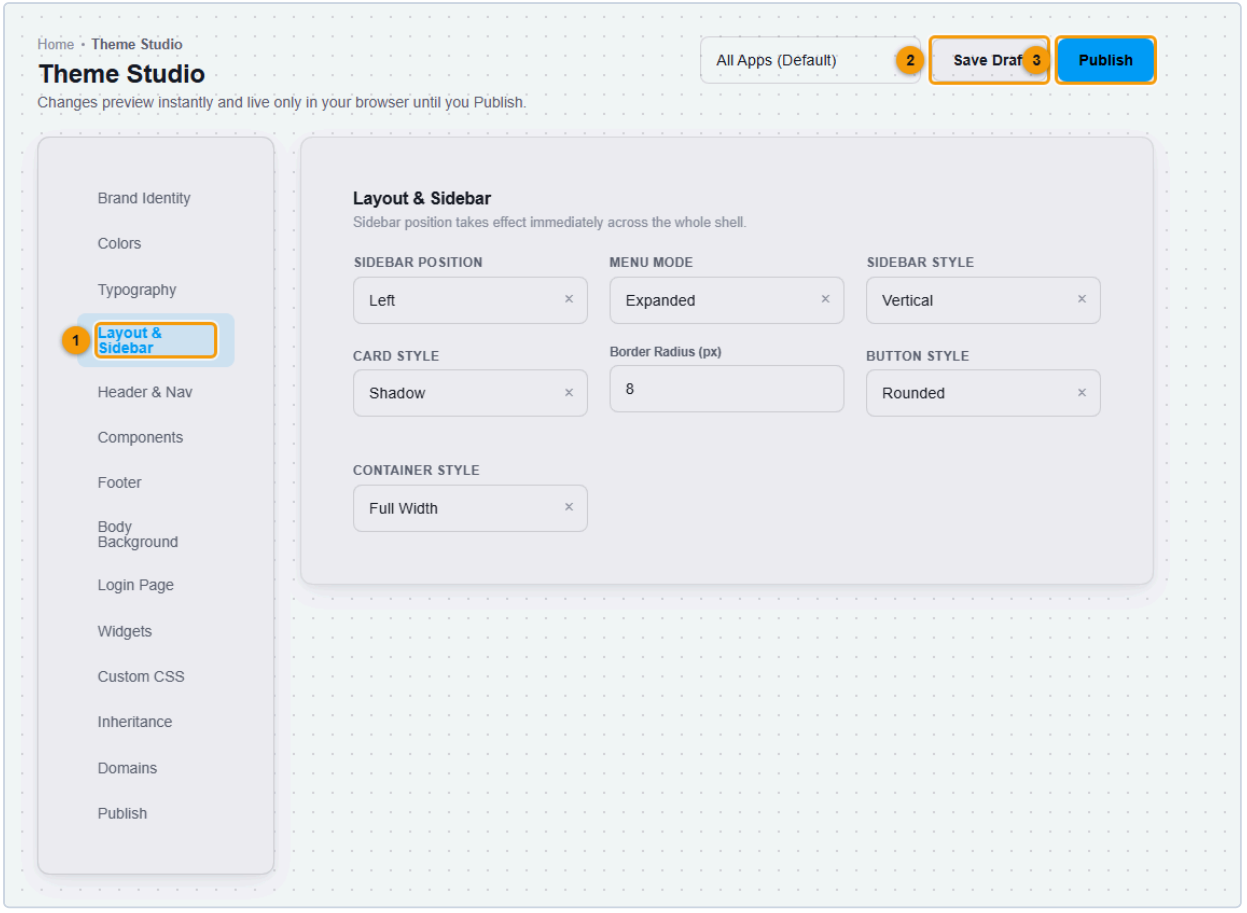
What this does

Besides your logo, colours and fonts, Theme Studio lets you change the shape of the app: where the sidebar sits, how cards and buttons look, the colour of the header and sidebar, the footer line, and the page background. Changes show right away in your own browser as a preview. They go live for everyone only when you click **Publish**.

Before you start

Open **Theme Studio** from your profile picture at the top right. You see it only if your plan includes White Label. The basics are in Brand NEXTOREx with your logo and colours.

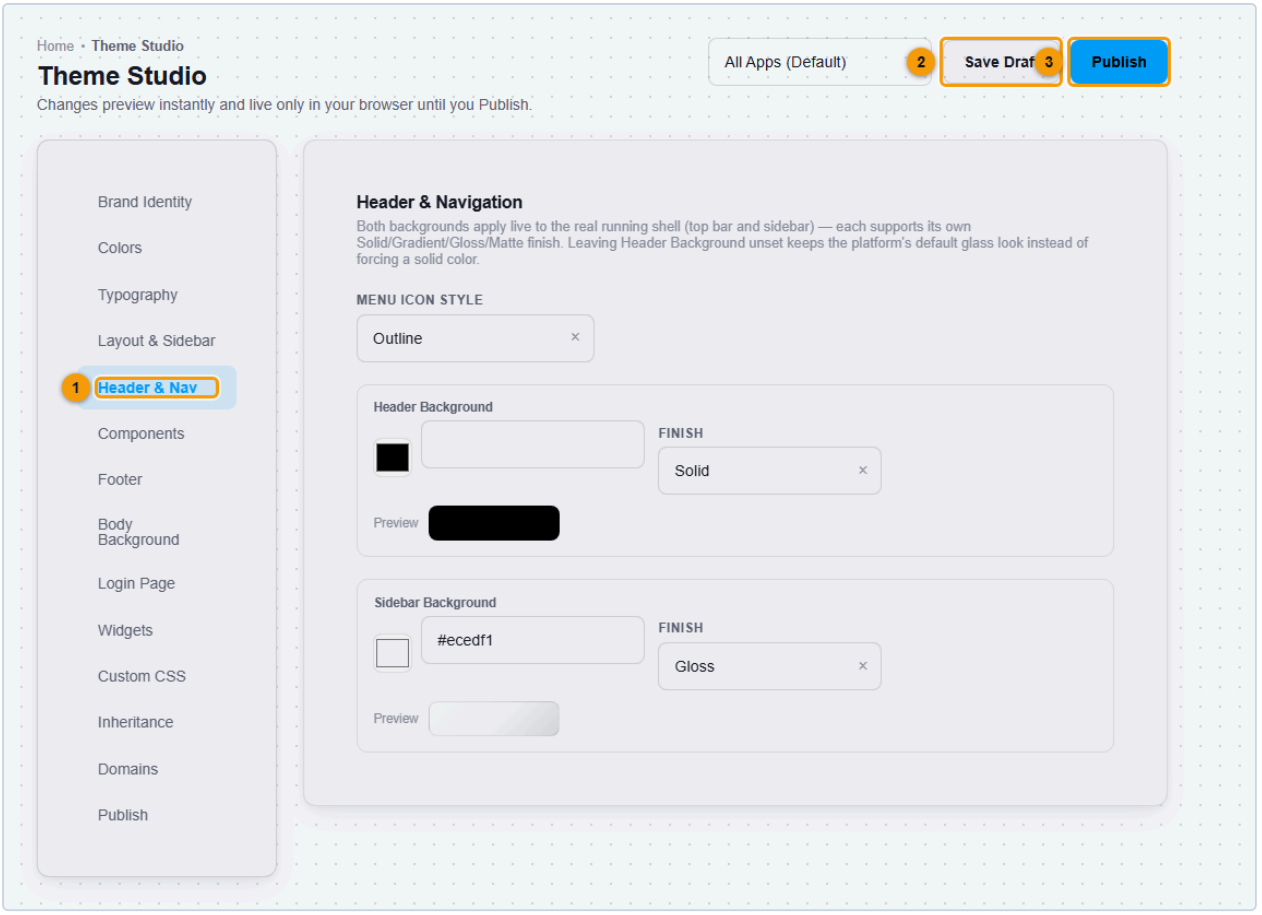
Layout & Sidebar



Choose the section (1). Save Draft (2) keeps your work and Publish (3) makes it live.

Choose the **Sidebar position**, **Menu mode**, **Sidebar style**, **Card style**, **Border radius**, **Button style** and **Container style**. Each is a drop-down or a number. The sidebar position changes at once across the app.

Header & Nav



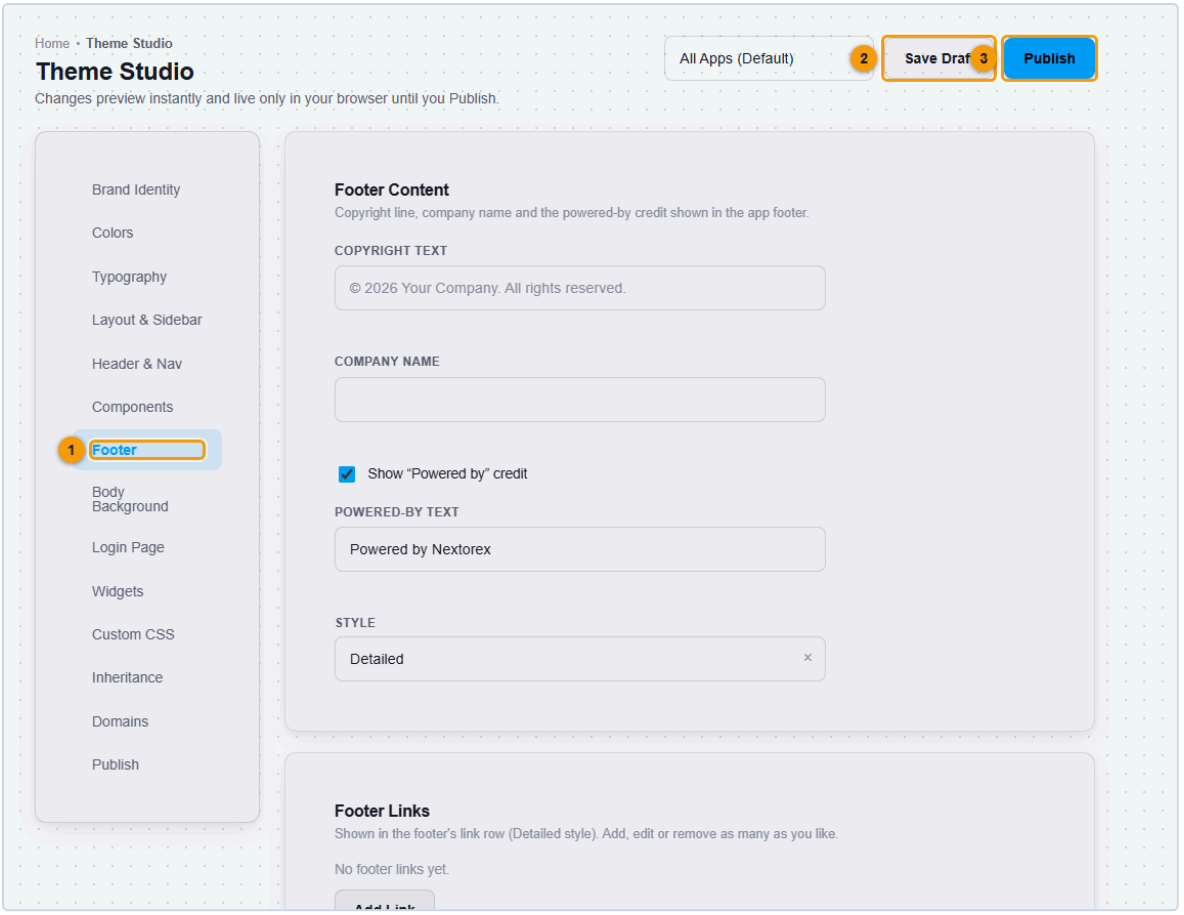
The header and sidebar backgrounds each have a colour and a finish.

Choose the **Menu icon style**, and a **Header background** and **Sidebar background**. Each background has a colour and a **Finish**: Solid, Gradient, Gloss or Matte. If you leave the header background empty, the app keeps its default look.

Components

Components sets the background, opacity, padding and header style of **Cards**, and the look of **Tables**, such as striped rows, compact rows and borders. Use the preview in the editor to check them.

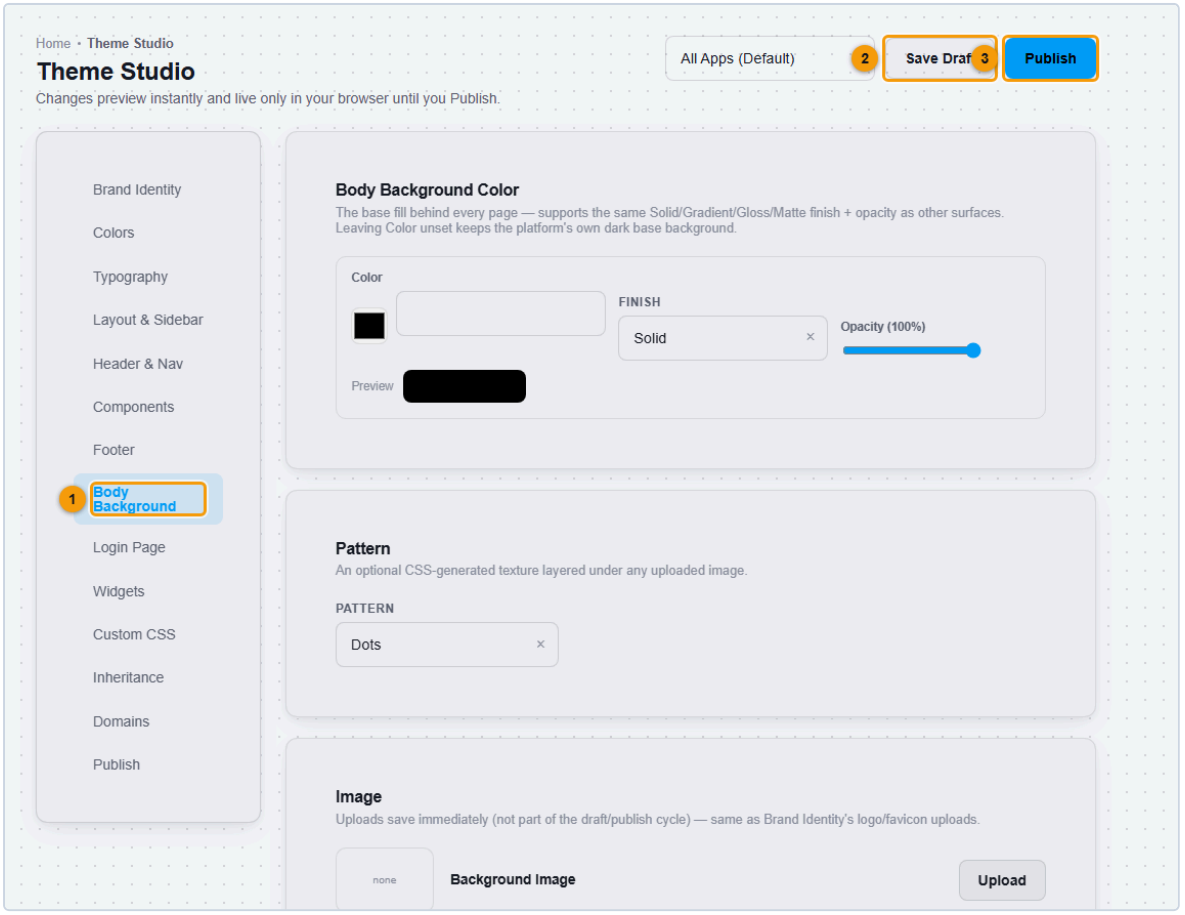
Footer



Copyright text, company name and the Powered by credit.

Set the **Copyright text** and **Company name**, and choose whether to **Show "Powered by" credit**. You can add **Footer links** with **Add Link**, and choose the footer **Style** and appearance.

Body Background



The base colour, a pattern and an optional image.

Choose the base colour behind every page, with the same finishes and an opacity. You can add a **Pattern**, and upload an **Image**. Image uploads save as soon as you upload them. They are not part of the draft and publish steps.

Custom CSS

Custom CSS is for developers. What you type is applied to every page as you type. Use it only if you know CSS. A mistake can make pages hard to read. Clear the box to go back.

Save and publish

1. Click **Save Draft** to keep your work without making it live.
2. Click **Publish** to make it live for your workspace.

Important notes

- Check your own changes in the places your users work. Text and background colours that look good on the sidebar may not suit tables or forms.
- Branding changes how the app looks. It does not turn every email, every sign-in page or every report into a branded document.
- The **All Apps (Default)** box at the top chooses which app the theme applies to.

Related guides

- Brand NEXTOREx with your logo and colours
- Connect your own domain

Reseller & Multi-Tenant

Manage client businesses under Agency

Create a client business

For Agency plans: add a client business, give its owner a login and choose its plan.

Plan: Agency (up to 10 client businesses)

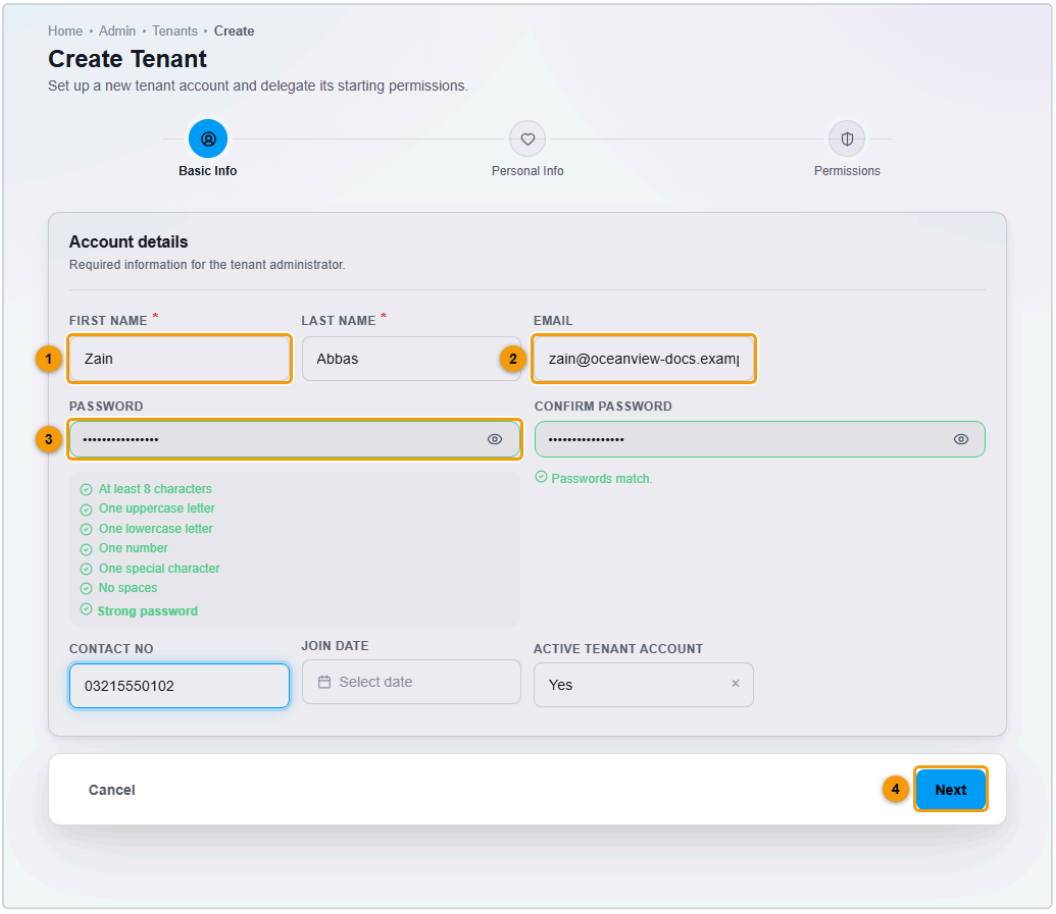
What this does

An Agency plan lets you set up and manage client businesses from your own account. Each client business is kept separate, with its own data and logins. Agency includes up to 10 client businesses.

Steps

1. Open **User Management**, then **Tenants**. This lists your client businesses.
2. Click **Add Tenant**. The **Create Tenant** page opens with three steps.

Step 1: Basic Info



Name (1), email (2), password (3) and Next (4).

1. Enter the client contact's **First name**, **Last name** and **Email** (2). The email is their login. The business appears in your list under the name you enter for this contact.

2. Enter a **Password** (3) and confirm it. Add a contact number if you have one.
3. Click **Next** (4). The client business is created at this point.

Step 2: Personal Info

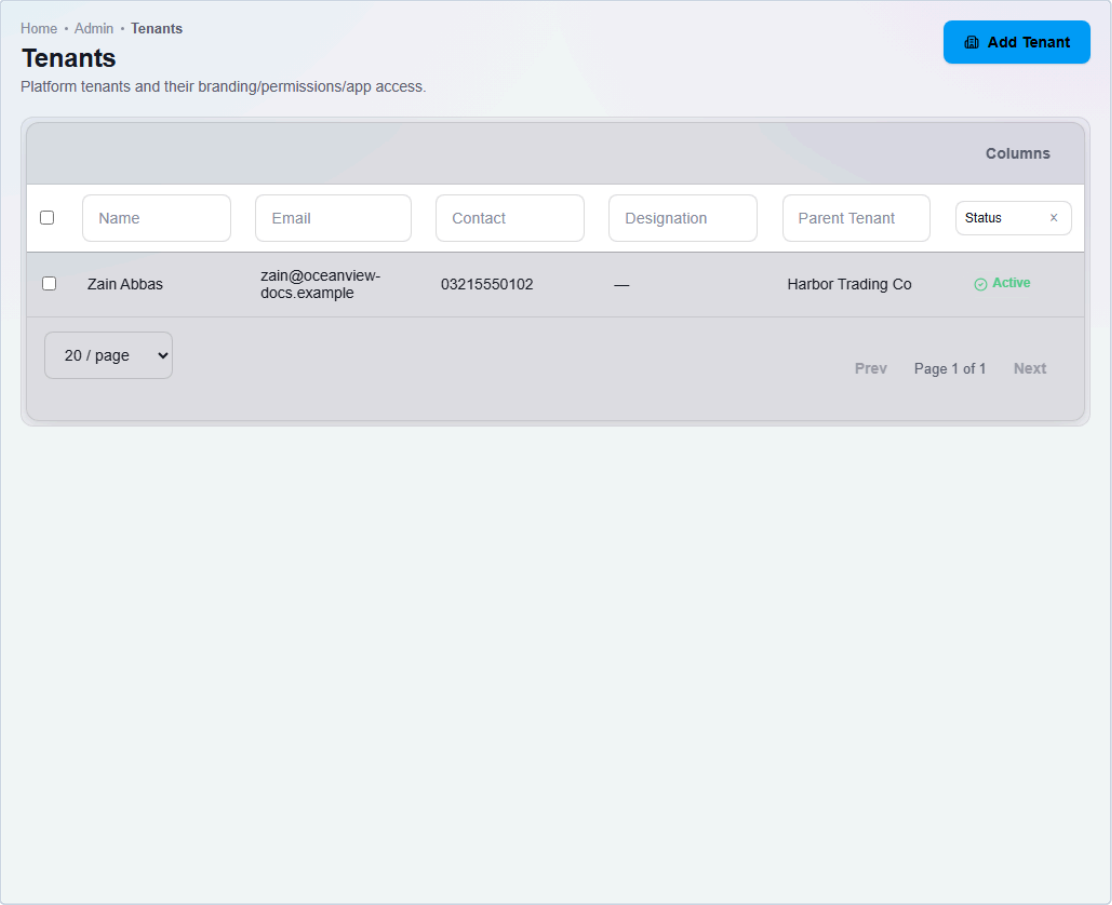
1. These details are optional. Click **Next**.

Step 3: Permissions

1. Choose the plan for the client. See Choose a plan for a client. You can click **Skip for now** and choose it later.

What happens next

The client business appears in your **Tenants** list.



Your client businesses.

When the client signs in for the first time, they complete the company setup for their business.

Important notes

- You can create up to 10 client businesses on Agency.
- Deleting a client business permanently deletes its companies, hierarchy and CRM data. It cannot be undone.

Related guides

- Choose a plan for a client
- Manage a client business

Choose a plan for a client

For Agency plans: give a client business the Starter, Business or Pro plan.

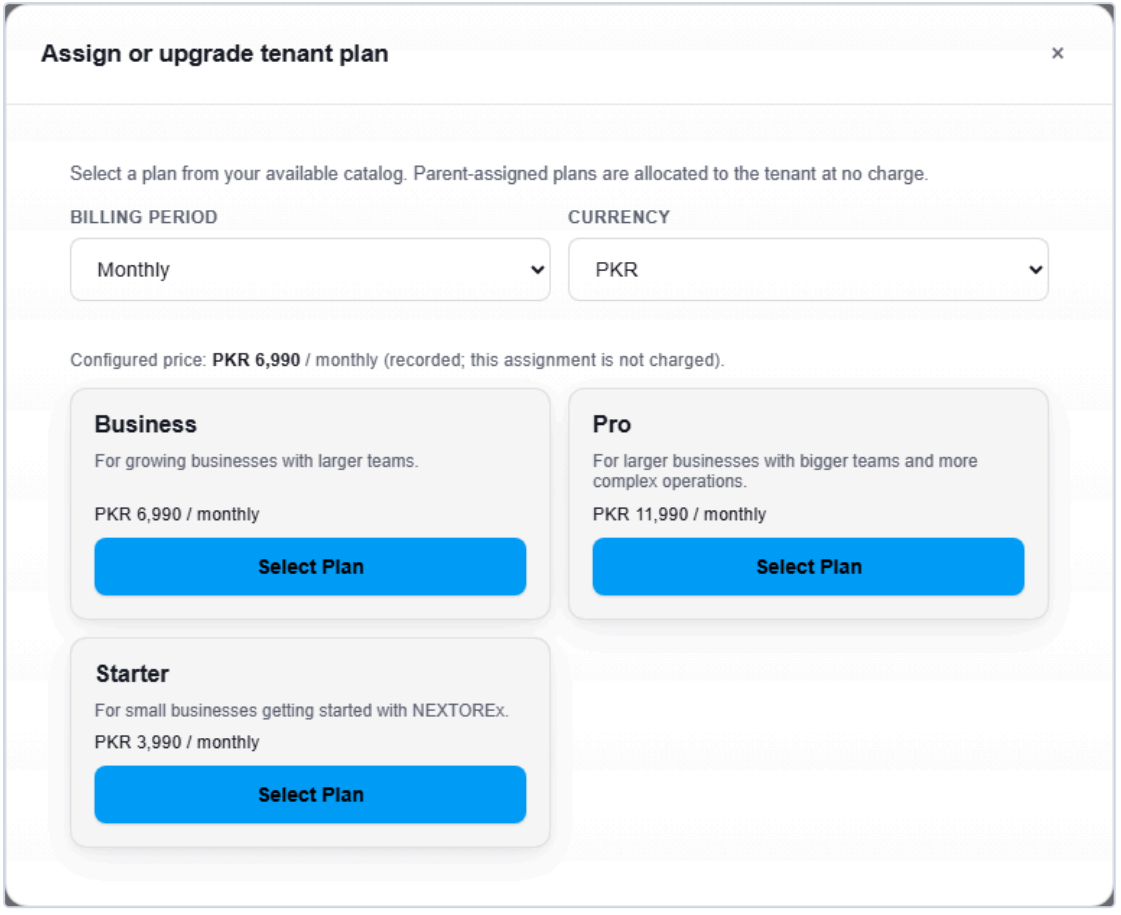
Plan: Agency

What this does

You decide which plan each of your client businesses uses. The plan sets what the client can use.

Steps

1. Open **User Management**, then **Tenants**, and open the client business.
2. Click the **Plan** tab. A new client without a plan shows **No active plan**.
3. Click **Assign Plan**. The **Assign or upgrade tenant plan** window opens.



You can give a client Starter, Business or Pro.

4. Choose the **Billing period**, **Monthly** or **Yearly**, and the **Currency**, **PKR** or **USD**.
5. Click **Select Plan** on the plan you want.

What happens next

The **Plan** tab shows the client's plan. You can change it later with **Upgrade / Change Plan**.

Important notes

- As an Agency you can give clients **Starter**, **Business** or **Pro**. Other plans are not available to give.
- The window says the plan is recorded for the client and that the assignment itself is not charged.
- Each plan has its own limits, for example the number of users. See Your plan.

Related guides

- Create a client business
- Manage a client business

Manage a client business

For Agency plans: open a client business to see its plan, capacity, branding and domains, or deactivate it.

Plan: Agency

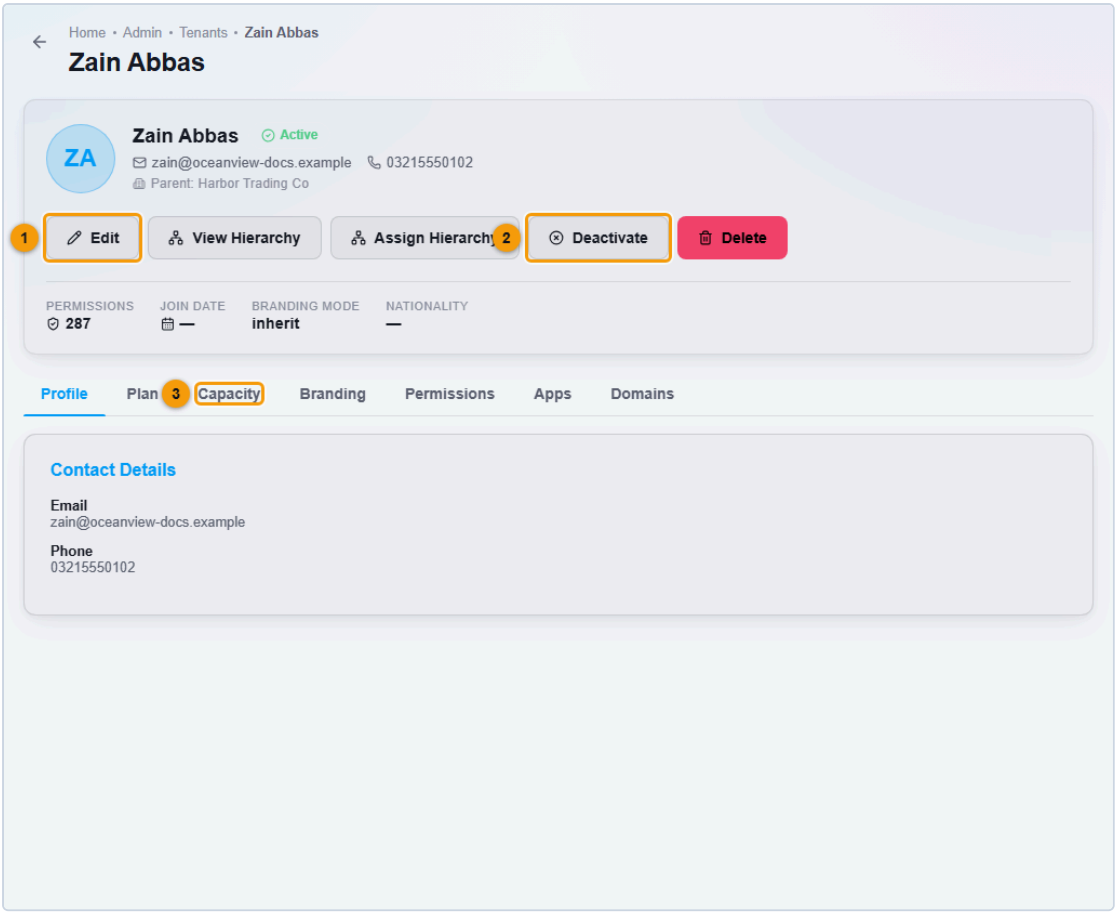
What this does

Each client business has a page where you can see and manage it.

Steps

1. Open **User Management**, then **Tenants**.
2. Double-click a client business to open it.

At the top you can see the contact, whether the client is **Active**, and buttons: **Edit**, **View Hierarchy**, **Assign Hierarchy**, **Deactivate** and **Delete**.



The tabs and actions for one client business.

Use the tabs:

- **Profile**: contact details.
- **Plan**: the client's plan. See Choose a plan for a client.
- **Capacity**: the client's limits, such as **Users**, **Custom Domains** and **Sub-Tenants**, with how much is used and what remains. **Increase** and **Decrease** buttons let you share more of your own spare capacity with the client.

- **Branding**, **Permissions**, **Apps** and **Domains**: branding, access and domain settings for the client.

What happens next

Changes to capacity apply straight away.

Important notes

- Capacity you give to a client comes from your own plan. You cannot give more than you have.
- **Deactivate** switches the client off. **Delete** permanently deletes the client business and everything in it.

Related guides

- Create a client business
- Brand NEXTOREx with your logo and colours

Agency limits and rules

The limits of an Agency plan: how many client businesses, which plans clients can have, custom domains and users.

Plan: Agency

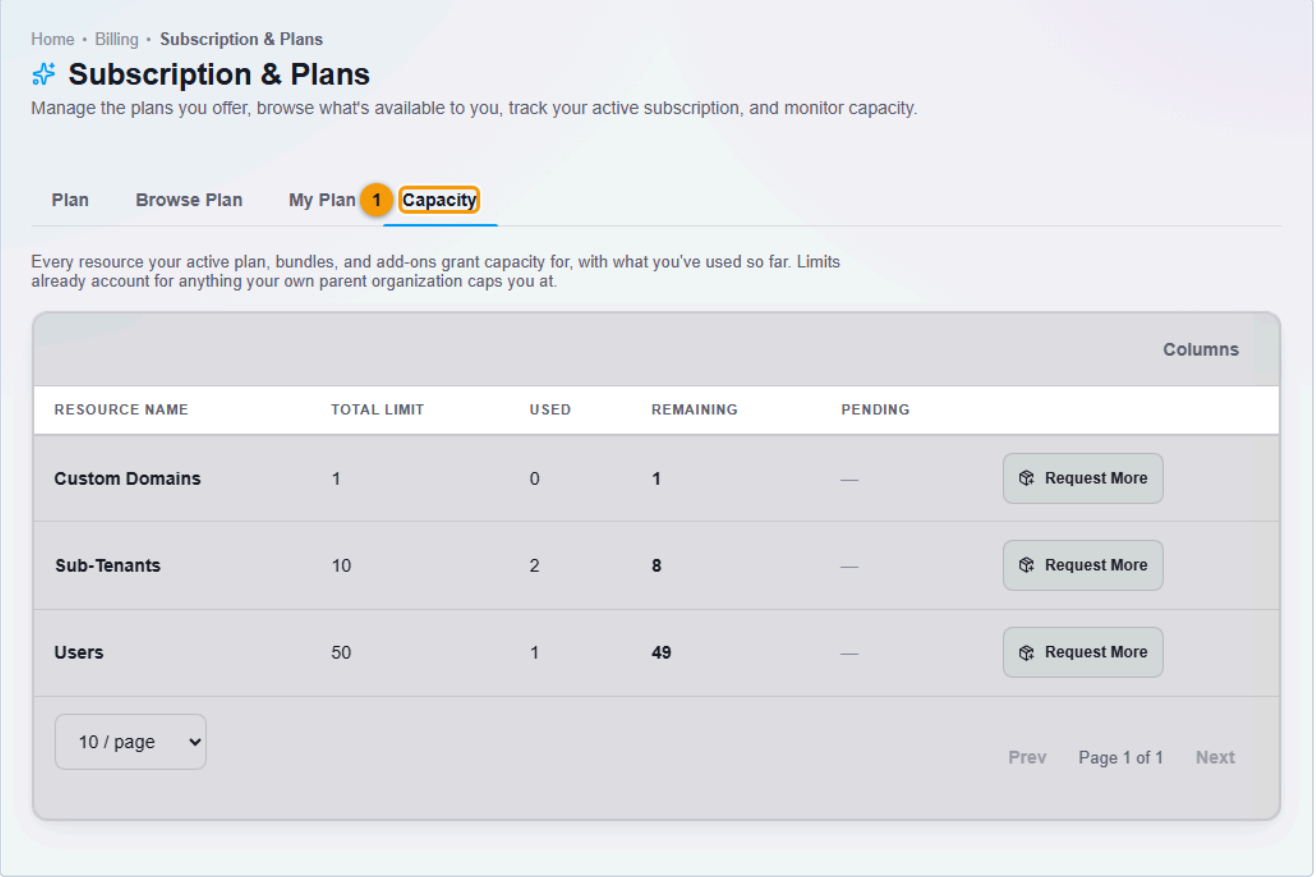
What this does

This page lists what an Agency account can and cannot do, so you can plan your client businesses.

The limits

What	Agency
Client businesses (sub-tenants)	Up to 10
Custom domains	1
Users	50

Open **Billing**, then **Subscriptions**, then **Subscription & Plans**, and click the **Capacity** tab to see each limit with how much you have **Used** and how much is **Remaining**.



Custom Domains, Sub-Tenants and Users with the amount used and remaining.

The rules

- **Plans for clients.** You can give a client **Starter**, **Business** or **Pro**. Other plans are not offered. See Choose a plan for a client.
- **No Agency inside an Agency.** A client business cannot be an Agency, so it cannot create client businesses of its own. A client's **Capacity** tab shows its own users and no client-business limit.
- **No CRM Basic for clients.** CRM Basic is not on the list of plans you can give a client.
- **Capacity comes from you.** What you give a client comes from your own limits. See Manage a client business.
- **Hierarchies are separate.** The number of client businesses is not the number of hierarchies. A client business has its own company and hierarchy. See Your company and branches.

Important notes

- A client business is created by the **Add Tenant** page. See Create a client business.
- Deleting a client business permanently deletes its data and cannot be undone.

Related guides

- Create a client business
- Choose a plan for a client
- Manage a client business

Troubleshooting & FAQ

Quick answers to common problems

Common questions

Quick answers about missing buttons, cash change, tax, cheques, profit figures and what NEXTOREx does not do.

Plan: All plans

What this does

Short answers to questions people ask most. Each answer links to the full guide.

Why can I not see a menu item or a button?

Either your **role** does not include it, or your **plan** does not. Ask an administrator to check your role. See How access works.

What happens when the customer gives me more cash than the total?

Enter the cash you received. NEXTOREx records only the sale total as the payment and shows the **Change due** to hand back. See Make a sale at the POS.

The POS will not let me finish a sale with nothing paid

POS Checkout needs a payment of at least 0.01. For a sale where the customer pays later, create a sales order.

The POS did not add sales tax

POS Checkout does not add sales tax to the cart. A sales order adds the tax rate set on each product, and the tax is shown in your accounts as **Sales Tax Payable**.

My customer paid later. How do I record it?

Post a receipt voucher. See Receive a customer payment. The **Collect Payment** button on a sales order is not available yet.

My profit looks too high

If you entered your starting stock as an **Opening Balance** adjustment, the value shows under **Inventory Adjustments** in the Profit & Loss report. See Profit and Loss report.

A cheque will not save

A cheque needs a **Party type** and a **Party**. See Cheques.

My purchase order says it is paid before I have paid anything

Before you receive goods, the order's **Net payable** is 0, so the status can read *paid*. After you receive goods it shows what you owe. See Receive goods from a supplier.

The company setup wizard shows an error

If you start the wizard again with a company name you already used, it can fail. Use a different name, or contact us. See Complete your company setup.

I cannot add a student: the active-student limit has been reached

Your Education package allows a fixed number of **enrolled** students, and you have used them all. Existing students are safe. Withdraw a student who has left, or move to a larger package. Inquiries can still be saved. See Students: admission and management.

The Section list is empty or disabled

In Education, choose the **Academic Group** first. The Section list then shows only the Sections of that Group. If the Group has no Sections yet, create them first. See Education getting started and academic structure.

I cannot change a student's marks

Marks are locked once the exam is published. Unpublish the exam on **All Exams**, correct the marks, then publish it again. See Exams, marks and report cards.

A payment or salary was refused with "Insufficient balance"

The cash or bank account does not hold enough money. Record the receipts you have received, or choose another account, then pay again. See Education receipt and payment vouchers.

Does NEXTOREx work on my phone?

NEXTOREx runs in a web browser, so you can open it in your phone's browser. There is no separate mobile app. You need an internet connection to use it, and there is no offline mode.

What does NEXTOREx not do?

NEXTOREx does not currently have:

- a link to FBR,
- offline POS or a mobile app,
- restaurant tables or kitchen orders,
- bank reconciliation, a Period Close, or accounting in more than one currency,
- a Trial Balance screen,
- a developer API.

If you need one of these, contact us.

Related guides

- Where to get help