

NEXTOREx

NEXTOREx Getting Started

Sign in, set up and make your first sale.

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Contents

Getting Started

Welcome to NEXTOREx

Sign in and understand the dashboard

Your profile, password and preferences

Complete your company setup

Add your first user

Add your first product

Add a customer

Make your first sale

Create your first purchase

Understand your accounts

Where to get help

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.

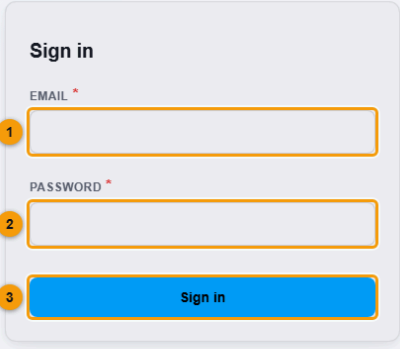
Plan: All plans

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).

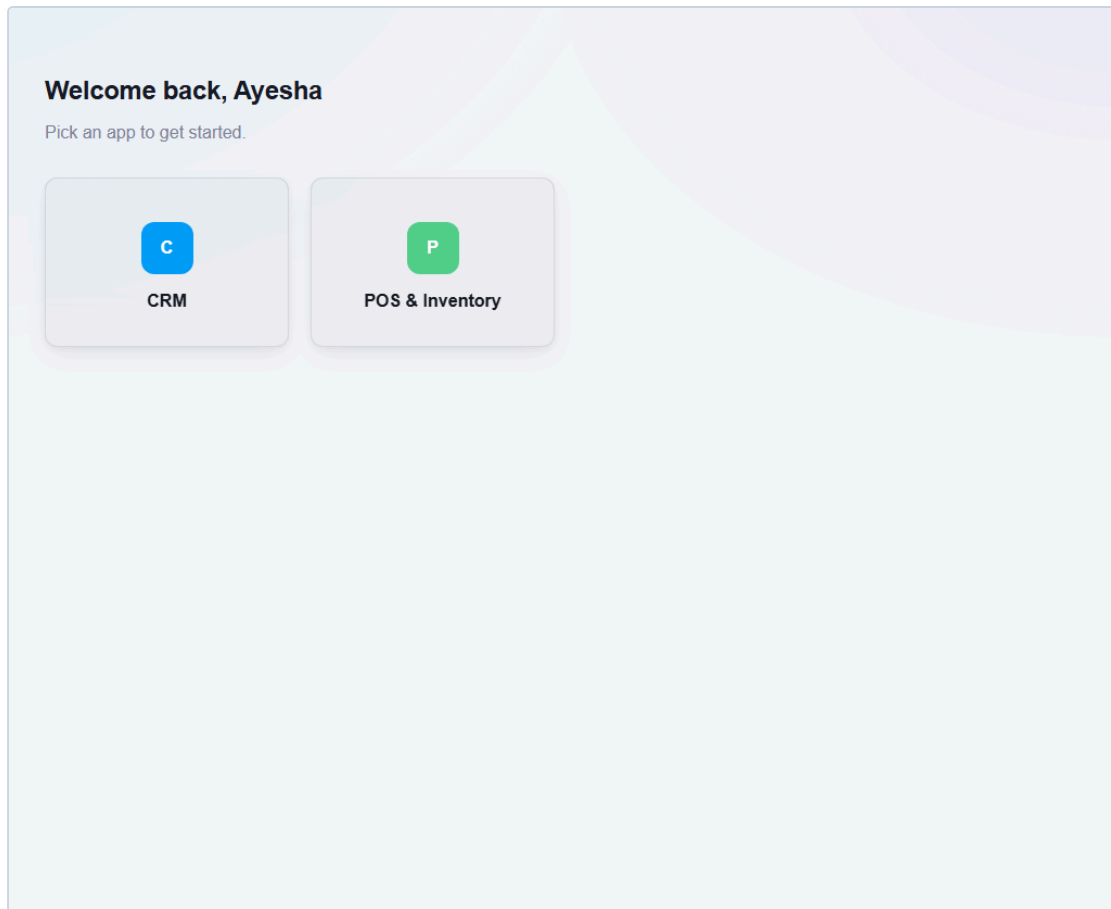
A sign-in form titled "Sign in" is centered on a light blue background. The form has a white background and rounded corners. It contains three elements: an "EMAIL" input field with an asterisk, a "PASSWORD" input field with an asterisk, and a blue "Sign in" button. Each element is preceded by a yellow circle with a number: 1 for the email field, 2 for the password field, and 3 for the sign in button.

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.

The screenshot shows the 'Settings' page for a user signed in as 'docs-admin@harbor-docs.example'. The left sidebar contains a search bar and a list of settings groups: Profile (highlighted with a blue box and a yellow circle with '1'), Business Flow, Accounting Scope, Notifications, Application, and Email Configuration. The main content area has a header for 'Harbor Trading Co' with the email 'docs-admin@harbor-docs.example'. Below this are four sections: 'Basic Information' with fields for First Name (Harbor), Last Name (Trading Co), Email Address (docs-admin@harbor-docs.e), and Mobile (03215550100); a 'Save Changes' button (highlighted with a blue box and a yellow circle with '2'); 'Security' with fields for Current Password, New Password, and Confirm Password, and a 'Change Password' button (highlighted with a blue box and a yellow circle with '3'); and 'Language & Timezone' (highlighted with a blue box and a yellow circle with '4') which includes a note about quick preferences and dropdowns for Language (English) and Timezone (UTC).

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).

Welcome — let's set up your workspace

Just a few steps to create your Company and Hierarchy.

Company Business Group Legal Entity Operating Unit Sub Unit Review & Finish

COMPANY NAME *

1 Ocean View Group

CURRENCY *

PKR - Pakistani Rupee

PHONE (OPTIONAL)

← Back 3 Next →

Company name, currency and Next.

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

Welcome — let's set up your workspace

Just a few steps to create your Company and Hierarchy.

Company Business Group Legal Entity Operating Unit Sub Unit Review & Finish

BUSINESS GROUP NAME *

1 Main Branch

← Back 2 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**.

Welcome — let's set up your workspace

Just a few steps to create your Company and Hierarchy.

Company

Business Group

Legal Entity

Operating Unit

Sub Unit

Review & Finish

Company

Business Group

Legal Entity

Operating Unit

Sub Unit

Tenant Admin Role

Permissions

Default Company

Default Hierarchy

Ocean View Group

Main Branch

Ocean View Traders (Pvt) Ltd

Head Office

Sales Counter

Will be created automatically

Inherited from parent tenant

Ocean View Group

Sales Counter

← Back

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](#)