

NEXTOREx

NEXTOREx POS & Sales

Checkout, sales orders, delivery and returns.

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Online edition: <https://nextorex.com/help>

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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

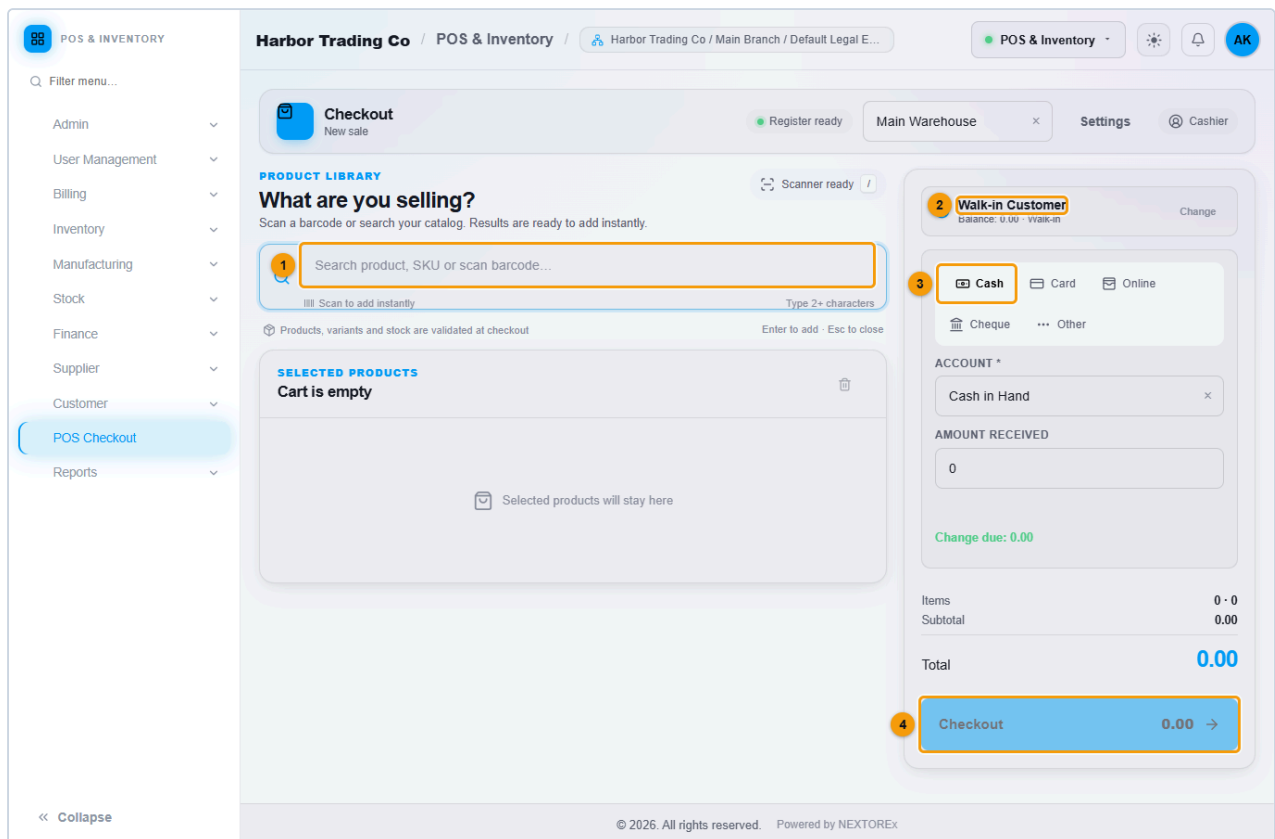
POS Checkout is the quick sale screen for the counter. You add products, take payment and finish in one screen. Each sale reduces your stock and is recorded in your sales and accounts.

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.

- 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.
- 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.
- 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.
- 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*.
- 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](#).

Checkout
New sale

Register ready Main Warehouse Settings Cashier

PRODUCT LIBRARY
What are you selling?
Scan a barcode or search your catalog. Results are ready to add instantly.

Search product, SKU or scan barcode...
Scan to add instantly Type 2+ characters
Products, variants and stock are validated at checkout Enter to add · Esc to close

SELECTED PRODUCTS
1 product

USB-C Cable
UC-020 **450.00**

pcs – 1 + 450 No discount

Walk-in Customer
Balance: 0.00 · Walk-in Change

Cash Card Online
Cheque ... Other

ACCOUNT *
Cash in Hand

1 AMOUNT RECEIVED
1000

2 Change due: 550.00

Items 1 · 1
Subtotal 450.00
Total **450.00**

3 Checkout 450.00 →

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

Harbor Trading Co / POS & Inventory / Harbor Trading Co / Main Branch / Default Legal E...

POS & Inventory

Filter menu...

- Admin
- User Management
- Billing
- Inventory
- Manufacturing
- Stock
- Finance
- Supplier
- Customer
- POS Checkout
- Reports

Checkout
New sale

Register ready

Main Warehouse

Settings

Cashier

PRODUCT LIBRARY

What are you selling?

Scan a barcode or search your catalog. Results are ready to add instantly.

Search product, SKU or scan barcode...

Scan to add instantly

Type 2+ characters

Products, variants and stock are validated at checkout

Enter to add - Esc to close

SELECTED PRODUCTS

2 products

Cotton Shirt
CS-001

3600.00

pcs 2 1800

No discount

Wireless Mouse
WM-010

1450.00

pcs 1 1450

No discount

Walk-in Customer
Balance: 0.00 - Walk-in

Change

Cash Card Online

Cheque ... Other

ACCOUNT *

Cash in Hand

AMOUNT RECEIVED

5050

Change due: 0.00

Items 2 - 3

Subtotal 5050.00

Total 5050.00

Checkout 5050.00 →

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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.

Sale Complete	
SO-000002	
paid Invoice generated	
Customer	Walk-in Customer
Items	2
Subtotal	5050.00
Total	5050.00
Paid	5050.00
Invoice ref	INV-2026-0002
Wireless Mouse x 1 1450.00	
Cotton Shirt x 2 3600.00	

Print Receipt New 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

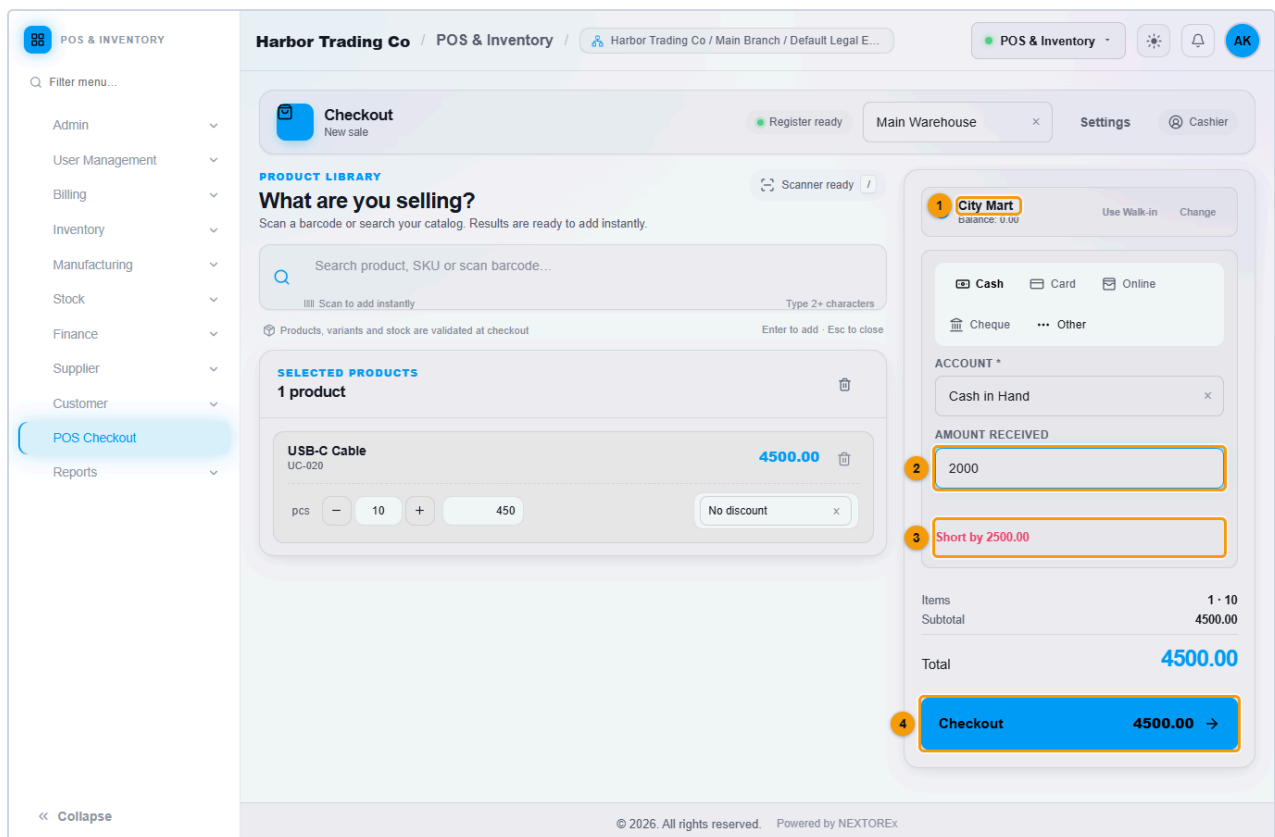
Sometimes a customer pays only part of the bill. NEXTOREx records the part payment and keeps the rest as an amount the customer owes you.

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**.

Sale Complete	
SO-000003	
partial	Invoice generated
Customer	City Mart
Items	1
Subtotal	4500.00
Total	4500.00
Paid	2000.00
Outstanding	2500.00
Invoice ref	INV-2026-0003
USB-C Cable x 10 4500.00	

Print Receipt

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.

Create Customer

Create a customer profile for sales, invoicing and payments.

Customer Information

CUSTOMER NAME * PHONE EMAIL

Alpha Traders 0300-1234567 accounts@alphatraders.example

Account Information

OPENING BALANCE TAX NUMBER

Address & Status

REGISTERED ADDRESS

12 Main Market, Lahore

☒ Active customer

Cancel Save

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.

Home • POS & Inventory • Customers

 Customer Ledger

Sales Orders

+ Add Customer

 **Customers**

Manage customer profiles, balances and sales relationships.

Columns					
Customer Name	Contact	Outstanding Balance	Status	Updated At	
AT Alpha Traders accounts@alphatraders.example	0300-1234567	0.00	Active	10/15/2026	
CM City Mart buying@citymart.example	0321-7654321	0.00	Active	10/15/2026	
WC Walk-in Customer No contact details	—	0.00	Active	10/15/2026	

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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.

Home • POS • Sales Orders • SO-000004

← **SO-000004**

SO-000004
Alpha Traders - Main Warehouse - Salesperson: — - Ordered 10/15/2026

Confirmed Payment: unpaid

1 Edit 2 Fulfill Goods 3 Cancel Order

Confirmed Delivered Paid

Deliver remaining goods to the customer.

GRAND TOTAL	INVOICED	COLLECTED	OUTSTANDING
8496.00	0.00	0.00	0.00
	0% invoiced	0% of invoiced	Fully settled

Order Details Deliver Payments Returns

Product	Ordered	Unit Price	Line Total	Delivered (Base)
Cotton Shirt	4 pcs	1800.0000	8496.00	—
		Subtotal		7200.00
		Grand Total		8496.00

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](#).

Home • POS & Inventory • Sales Orders

 **Sales Orders**

Create, track and fulfill customer orders from one place.

+ Create Sales Order

Customer

Customer

Date

Date

×

Filter

Columns					
Sales Order Number	Customer	Date	Status	GRAND TOTAL	Payment Status
SO-000002	Walk-in Customer	10/15/2026	Delivered	5050.00	paid
SO-000003	City Mart	10/15/2026	Delivered	4500.00	partial
SO-000001	Alpha Traders	10/15/2026	Delivered	1800.00	paid
SO-000004	Alpha Traders	10/15/2026	Delivered	8496.00	unpaid

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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

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

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

- Check the **Delivered date** (1).
- For each product, the table shows **Ordered**, **Delivered so far**, **Remaining** and **In stock**. Check the **Fulfill now** quantity (2).
- 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).

Home · POS · Sales Orders · SO-000006

←

SO-000006

SO-000006

Alpha Traders · Main Warehouse · Salesperson: — · Ordered 10/16/2026

Delivered

Payment: paid

POS

Invoice: INV-2026-0006

1

Return Goods

Cancel Order

Confirmed

Delivered

Paid

Order fully delivered and paid — no further action required.

GRAND TOTAL1450.00

INVOICED1450.00100% invoiced

COLLECTED1450.00100% of invoiced

OUTSTANDING0.00Fully settled

Order Details

Deliveries

Payments

Returns

Product	Ordered	Unit Price	Line Total	Delivered (Base)
Wireless Mouse	1 pcs	1450.0000	1450.00	1.0000
Subtotal				1450.00
Grand Total				1450.00

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*.

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

Return Goods — SO-000006

1 **RETURN WAREHOUSE**
Main Warehouse

2 **REASON FOR RETURN**
Customer changed mind

Product	Returnable (Base)	Return Qty	Unit
Wireless Mouse WM-010	1.0000 pcs	1	Piece (pcs) — Bk

Returning goods adds stock back into the selected warehouse and credits the customer's balance for the returned value — this cannot be undone from here.

Cancel 4 **Confirm Return**

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.

Harbor Trading Co / POS & Inventory / Harbor Trading Co / Main Branch / Default Legal...

Home • POS & Inventory • Sales Returns

Sales Returns

Review customer returns and their financial impact.

Warehouse: All warehouses Date: Date Filter

1 returns

Return Number	Invoice Number	Return Date	Warehouse	Return Amount	Status
SR-000001	SO-000006	10/16/2026	Main Warehouse	1450.00	completed

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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.

Home • POS & Inventory • Sales Returns • SR-000001 completed ...

SR-000001

SO-000006 - Alpha Traders

← Back to Sales Returns

Return amount 1450.00	Return date 10/16/2026	Invoice SO-000006	Customer Alpha Traders	Warehouse Main Warehouse	Created by Ayesha Khan
---------------------------------	---------------------------	----------------------	---------------------------	-----------------------------	---------------------------

Summary

Sales return record and workflow information.

Return number SR-000001	Status completed	Return date 10/16/2026
Original invoice SO-000006	Warehouse Main Warehouse	Created by Ayesha Khan

Customer and warehouse

Customer
Alpha Traders

Warehouse
Main Warehouse

Company / hierarchy
Current context

Returned items

Quantities and values from the sales return record.

PRODUCT	SKU	RETURNED QUANTITY	UNIT	BASE QUANTITY	UNIT PRICE
Wireless Mouse	WM-010	1.0000	pcs	1.0000	1450.00

Returned lines 1

Total refundable amount 1450.00

Activity

- Return created
10/16/2026 - Ayesha Khan
- completed
Current return lifecycle status

Refund / financial summary

Amounts remain sourced from the return record.

Refundable amount 1450.00	Refunded amount —
Remaining refund 1450.00	

Audit information

Created at
10/16/2026

Reference
SR-000001

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.

POS settings

These defaults apply to the current company and register context.

1 Walk-in Customer

Walk-in Customer
Balance: 0.00 · Walk-in Change

2 WALK-IN SALES ACCOUNT

Select account...

3 DEFAULT PAYMENT TYPE

Cash

Available payment types

- ☒ Cash
- ☒ Card
- ☒ Online transfer
- ☒ Cheque
- ☒ Other

Cancel 4 Save defaults

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.



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](#)