CoreAxis ePOS

GST-ready billing, offline-first POS and complete business management

OFFICIAL USER MANUAL · Manual v1.0 for CoreAxis ePOS 2.4 (web) / 3.0 (Android)

The complete guide to CoreAxis ePOS

From creating your account and setting up your business to billing at the counter, managing stock, keeping accounts, filing GST and reading reports — every step shown on the real application.

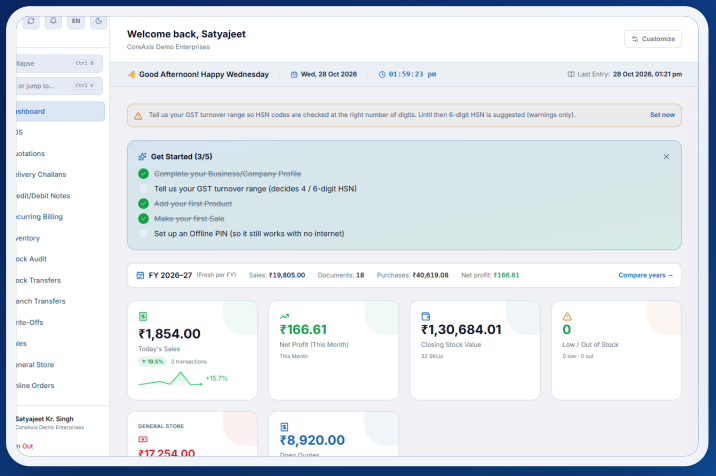

Figure Dashboard — the whole business at a glance

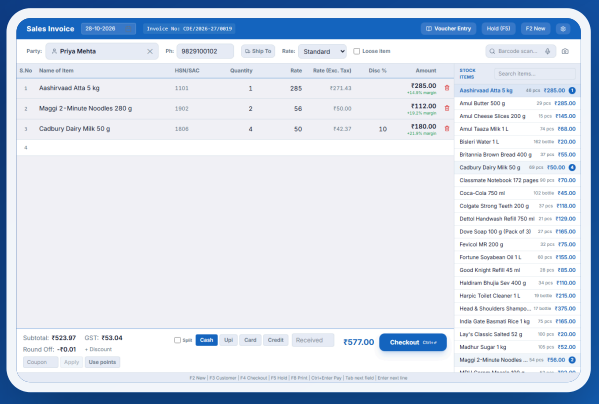

Figure POS billing at the counter

Example business

CoreAxis Demo Enterprises, MI Road, Jaipur — owner Satyajeet Kr. Singh

Inside

16 chapters · step-by-step tasks · worked examples · real screens

Works on

Web browser, Windows desktop, Android app — online or offline

coreaxis.cloud info@coreaxis.cloud Call / WhatsApp +91 91131 07586

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How to use this manual

- Each chapter starts with what the feature is for and a short **Hinglish quick start**.
- **Numbered steps** tell you exactly what to click. Bold words are the buttons and menu names on screen.
- Numbered circles on a screenshot match the step numbers next to it.
- **Worked examples** use the sample business, CoreAxis Demo Enterprises.

Callouts

TIP
A faster way or a good habit.

NOTE
Useful background or a rule the software follows.

WARNING
Something that is hard to undo or affects your books.

CHAPTER 1

01

Welcome to CoreAxis ePOS

CoreAxis ePOS is one account for billing, stock, customers, accounts, GST and staff. This chapter explains what the software does, where it runs and how the screen is laid out, so every later chapter feels familiar.

Jaldi samjhein (Hinglish quick start)

CoreAxis ePOS ek hi account mein billing (POS), stock, customer khata, accounts aur GST sab kuch deta hai. Browser, Windows app aur Android app — teeno par same data. Pehle screen ka layout samajh lijiye: left mein menu, beech mein kaam, right mein shortcut buttons.

What you can do with CoreAxis ePOS

CoreAxis ePOS is made for Indian shops, distributors and service businesses. The same account runs:

Area	What it covers
Billing (POS)	Fast counter billing with barcode, discounts, split payment, credit (khata), hold bills, thermal and A4 printing, WhatsApp bills
Sales documents	Sales history, returns, cancellations, quotations, delivery challans, credit / debit notes, recurring bills
Inventory	Items with HSN / GST, categories, units, stock in every branch, stock audit, transfers, write-offs, barcode labels, alerts
Purchases	Suppliers, purchase orders, receiving goods, purchase bills (F9), purchase returns, supplier bills and payments
Customers	Customer ledgers, credit limits, loyalty points, khata reminders, offers and the customer portal
Finance	Chart of accounts, cash and bank books, day book, receipts, payments, expenses, contra and journal vouchers, P&L and balance sheet
GST	GSTR-1, GSTR-3B, GSTR-2B reconciliation, ITC register, e-invoice and e-way bill
Reports and HR	Sales, stock, accounts, GST and dues reports; employees, attendance, payroll and leave

Where it runs

- **Web browser** — open **coreaxis.cloud/app/login** in Chrome or Edge on any computer.
- **Windows desktop app** — the same screens, with direct printing and offline billing.
- **Android app (CoreAxis ePOS 3.0)** — billing, khata and reports on your phone. See Chapter 15.
- All of them use **one account and one set of data**. A bill made on the phone appears on the computer within seconds.

> **NOTE**
> If the internet drops, keep billing. Sales are saved on the device and sent to the server automatically when the connection returns. The status bar at the bottom shows **Synced** when everything has reached the server.

The screen at a glance

Every page has the same frame. Learn it once and you can find anything.

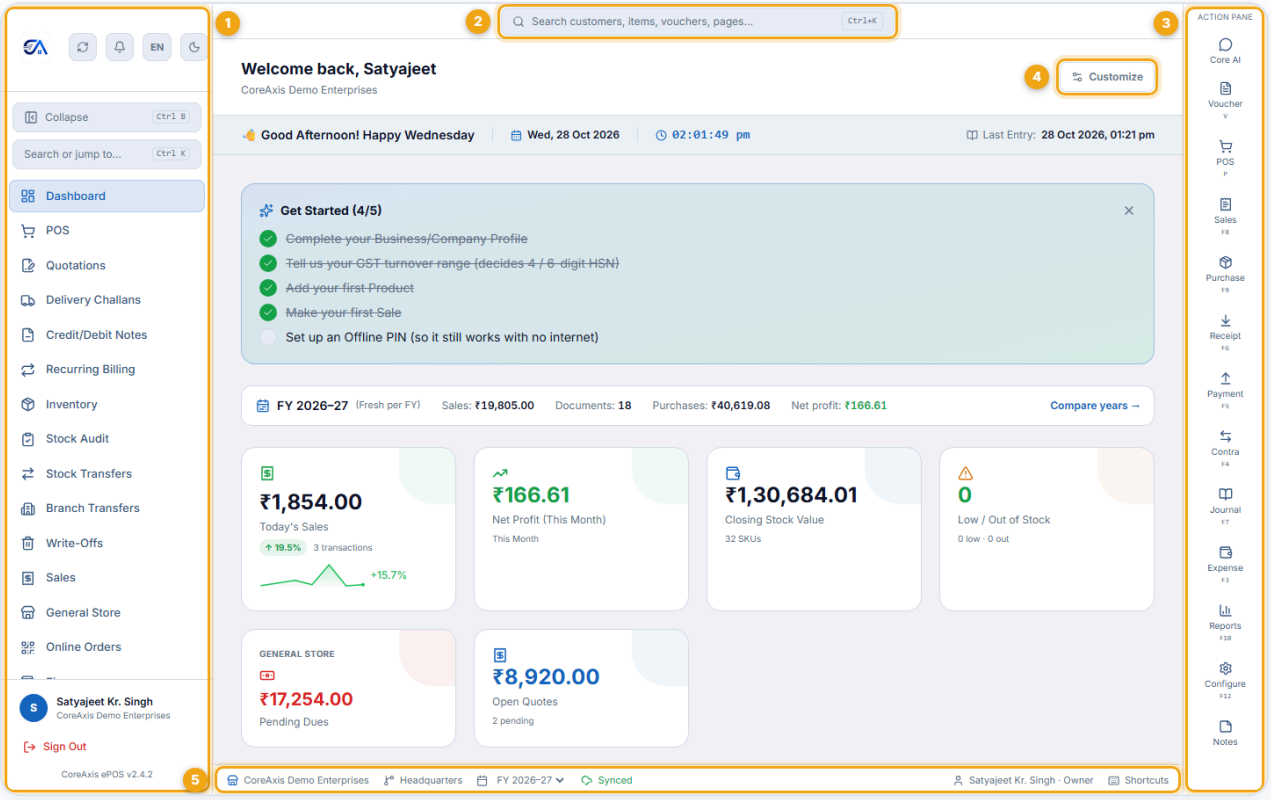

Figure The main layout — CoreAxis Demo Enterprises, Dashboard

1. **Sidebar (1)** — every module: POS, Quotations, Inventory, Sales, Finance, Customers, Reports, Settings and more. **Collapse** it with Ctrl + B to get more room; it then shows icons only.
2. **Search bar (2)** — press Ctrl + K and type a customer, item, bill number or page name to jump straight to it.
3. **Action Pane (3)** — one-click vouchers on the right: Voucher (V), POS (P), Sales (F8), Purchase (F9), Receipt (F6), Payment (F5), Contra (F4), Journal (F7), Expense (F3), Reports (F10), Configure (F12) and Notes.
4. **Customize (4)** — choose which cards the Dashboard shows.
5. **Status bar (5)** — business name, current branch, financial year, sync status, the signed-in user with role, and the **Shortcuts** list.

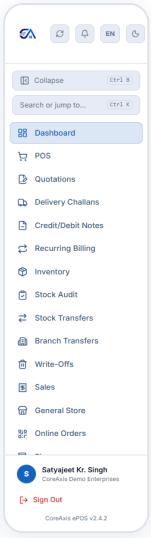

Figure Expanded sidebar

Figure Status bar: business, branch, FY, sync, user

Search anything and keyboard help

1. Press **Ctrl** + **K** on any page (or click the search bar at the top).
2. Type a few letters — for example **rahul**. Matching customers, items, vouchers and pages appear.
3. Use the arrow keys and press **Enter** to open the result.
4. Press **?** on any page to see the keyboard shortcuts for that page.

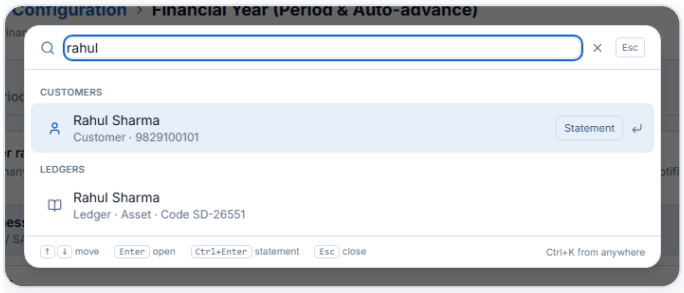

Figure Ctrl+K search — typing “rahul” finds the customer Rahul Sharma

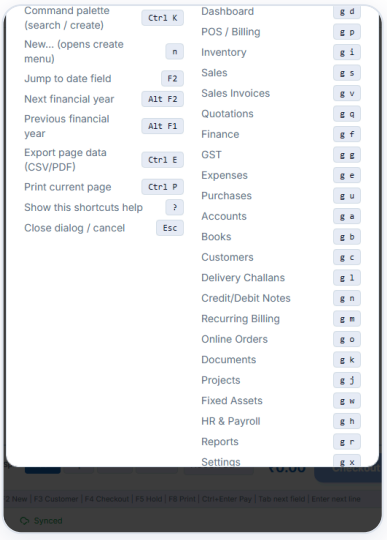

Figure Press ? for the shortcut list

TIP

Press **g** and then a letter to jump between modules: **g** **p** POS, **g** **i** Inventory, **g** **s** Sales, **g** **r** Reports, **g** **x** Settings. The full list is in Appendix B.

The example business used in this manual

Every screenshot comes from a sample business set up for this manual. Use the same numbers to follow along.

Detail	CoreAxis Demo Enterprises
Owner	Satyajeet Kr. Singh
Type	General Store / Kirana (retail and wholesale)
Address	45, MI Road, Near Panch Batti, Jaipur 302001, Rajasthan
GSTIN	08BXKPS4321L1Z0 (Regular GST, state code 08 — Rajasthan)
Branches	Headquarters (MI Road) and Vaishali Nagar Branch
Bill numbers	CDE/2026-27/0001, CDE/2026-27/0002 …
UPI / bank	coreaxisdemo@okhdfc · HDFC Bank current account
Data	33 items in 7 categories, 5 suppliers, 10 customers, 8 purchases, 19 bills, receipts, payments, expenses, quotations, a challan, credit notes, a cashier and 2 employees

NOTE
Names, phone numbers and GSTINs in the example are made up. GST rates and HSN codes are examples — confirm the right ones for your items with your tax adviser.

CHAPTER 2

02 Create Your Account and Sign In

How to register a new business, sign in every day, handle the one-time code (OTP), recover a forgotten password and protect the account with two-factor authentication.

Jaldi samjhein (Hinglish quick start)

Naya account banane ke liye **coreaxis.cloud/app/register** kholiye — 3 step: business aur owner details, business type, password. Roz login ke liye **coreaxis.cloud/app/login** par email + password. Naye device par email OTP aata hai.

Register a new business

Open **coreaxis.cloud/app/register** in Chrome or Edge, or tap **Create account** in the app. Registration has three short steps.

Step 1 — Business and owner

1. Enter the **Business/Company Name** exactly as it should print on bills.
2. Enter **Your Name** (the owner), a working **Email** and your **Phone** number.
3. Click **Next**.

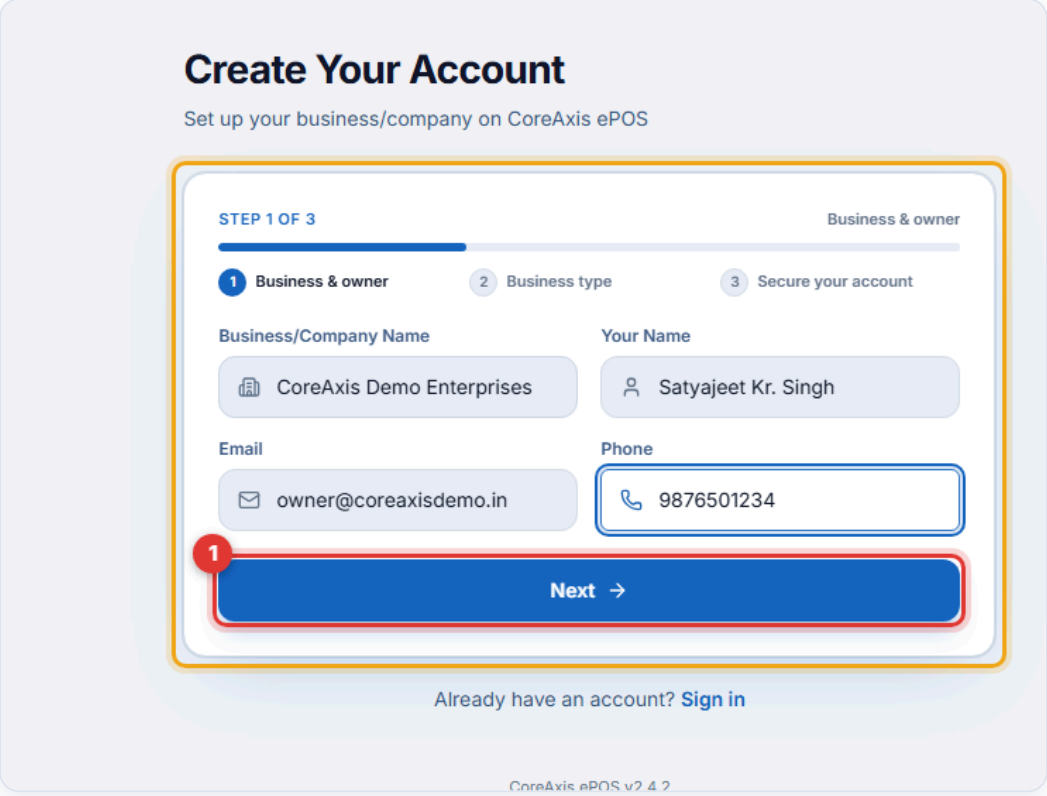

Figure Step 1 of 3 — CoreAxis Demo Enterprises, owner Satyajeet Kr. Singh

Step 2 — Business type

1. Choose the **Type of Business/Company** (1). This switches on the right screens automatically — for example batches and expiry for a pharmacy, KOT for a restaurant, khata and loose items for a general store.
2. Optionally pick your **GST turnover range** (2). It decides whether invoices need 4-digit or 6-digit HSN codes. You can set it later.
3. Click **Next** (3).

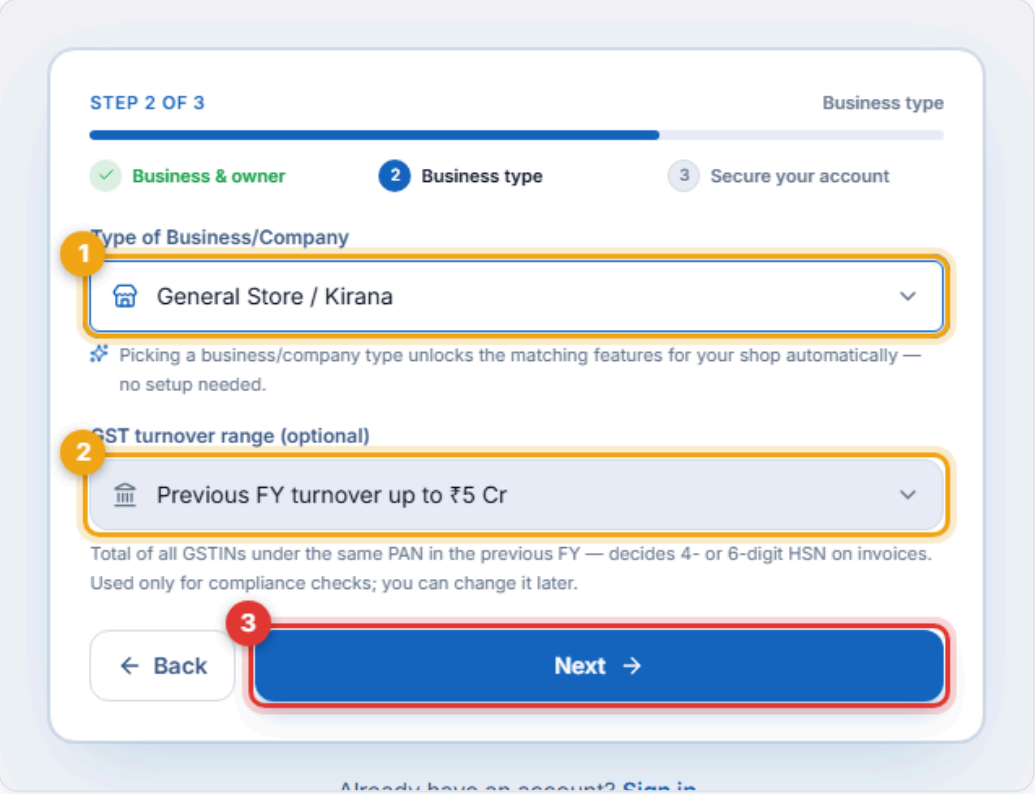

Figure Step 2 of 3 — General Store / Kirana, turnover up to ₹5 crore

Step 3 — Secure your account

1. Create a **Password** (1) and type it again in **Confirm Password** (2). Use at least 8 characters with capital and small letters and a number.
2. Click **Create Account** (3).
3. A 6-digit code is emailed to you. Enter it on the next screen to verify the email. Your business is then ready and you land on the Dashboard.

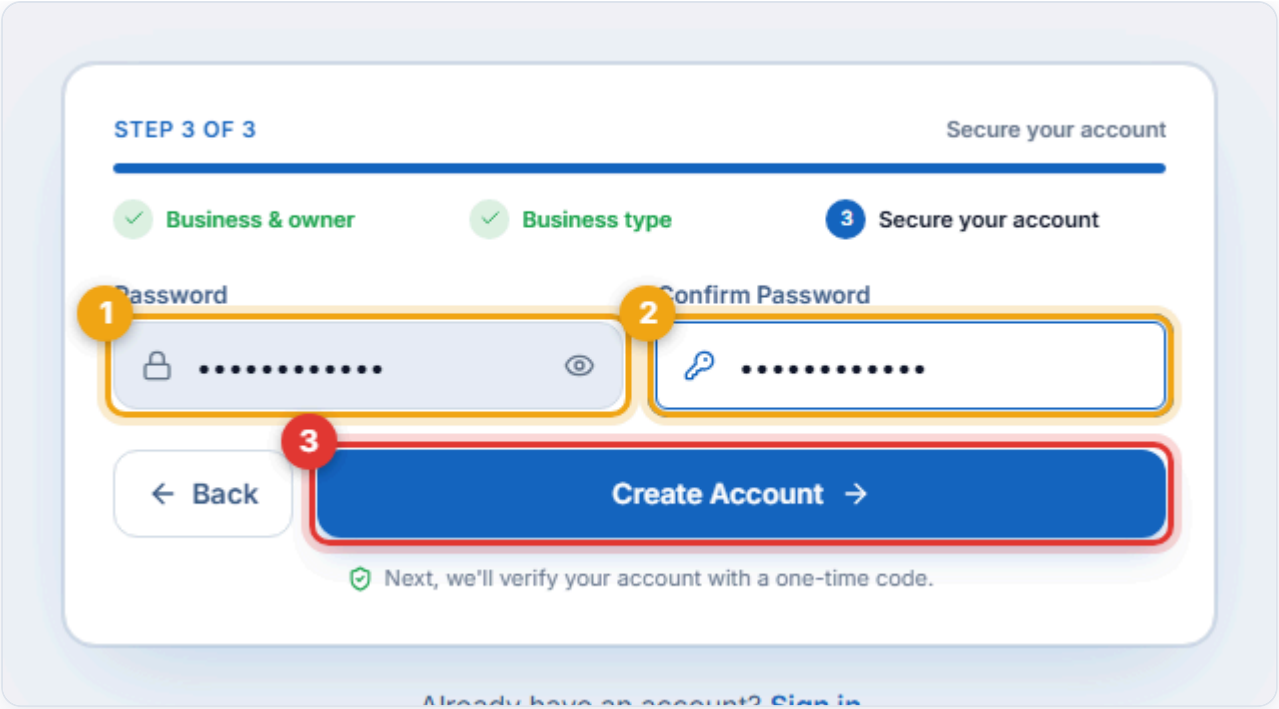

Figure Step 3 of 3 — password and Create Account

> **WARNING**
> The business type can be changed only before the first sale during the trial. After that, contact support to change it.

Sign in every day

1. Open **coreaxis.cloud/app/login** (or the CoreAxis desktop / Android app).
2. Enter your registered **Email** (1) and **Password** (2).
3. Click **Sign In** (3).
4. On a new device or browser you may be asked for a one-time code sent to your email. Type it and continue.
5. If two-factor authentication is on, enter the 6-digit code from your authenticator app.

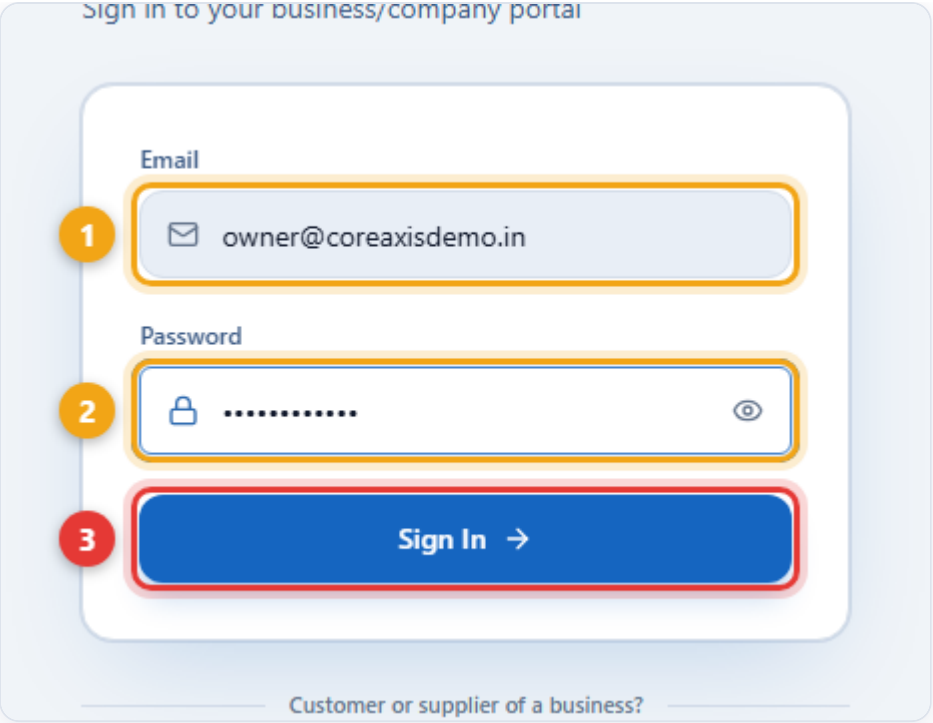

Figure Sign in with email and password

"Active Session Found"

For safety an account is open on one device at a time. If you sign in on a second device, this message appears. Click **Continue Here** to sign in here (the other device is signed out) or **Cancel** to keep the other one.

> **TIP**
> Staff should never share the owner's login. Give each person their own login with a role (Chapter 5) — every bill then shows who made it.

> **NOTE**
> Customers and suppliers of your business have their own portals: use **Customer portal** or **Supplier portal** under the sign-in box.

Forgot your password

1. On the sign-in page click **Forgot password?**.
2. Enter the email address of your account and click the button to send the code.
3. Type the code you receive, then set a new password.
4. Sign in with the new password.

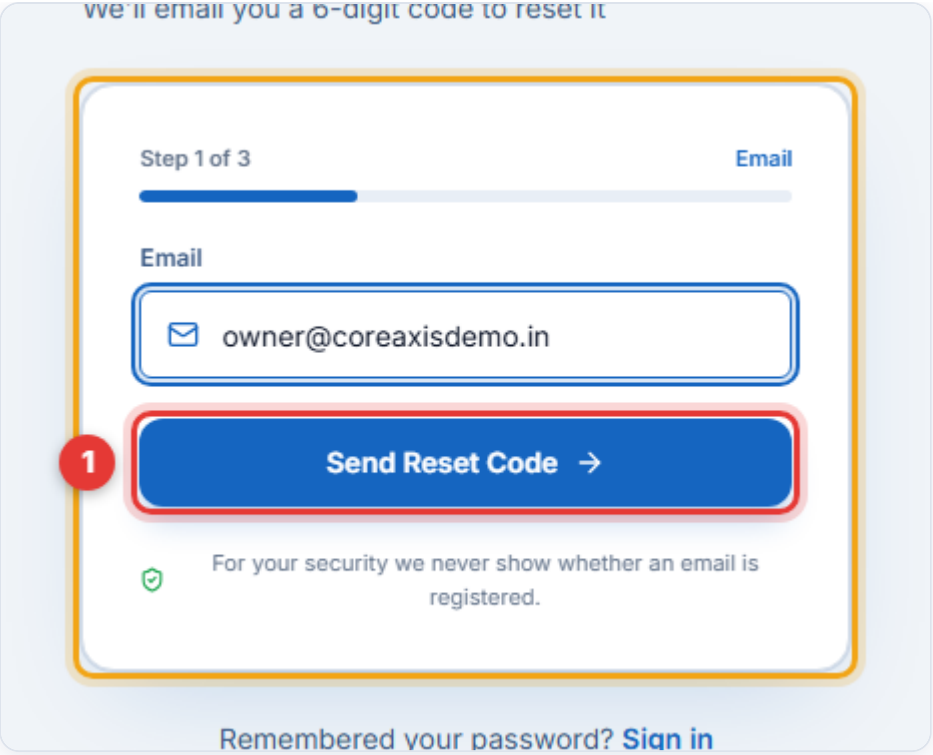

Figure Forgot password — a one-time code is emailed to you

> **NOTE**
> A staff member who forgets the password can also ask the owner to set a new one from **Settings → Team & Billing → Team & Roles**.

Turn on two-factor authentication (2FA)

2FA adds a second check at sign-in: after the password you type a code from an app on your phone (Google Authenticator, Microsoft Authenticator, Authy). Owners should always turn it on.

1. Go to **Settings → Security & Data → Security (2FA & Offline PIN)**.
2. On the **Two-factor** tab click **Enable Two-Factor Authentication**.
3. Open your authenticator app, tap **+** and scan the QR code shown (or type the key shown below it).
4. Type the 6-digit code from the app and click **Confirm & Enable**.
5. From now on, sign-in asks for the code from the app after your password.

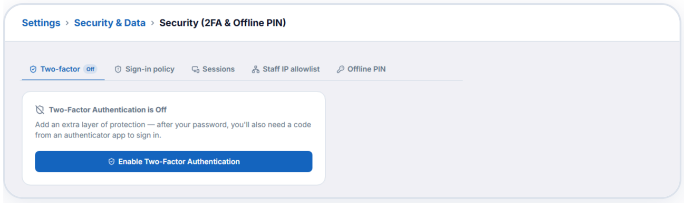

Figure Security page — Two-factor is Off

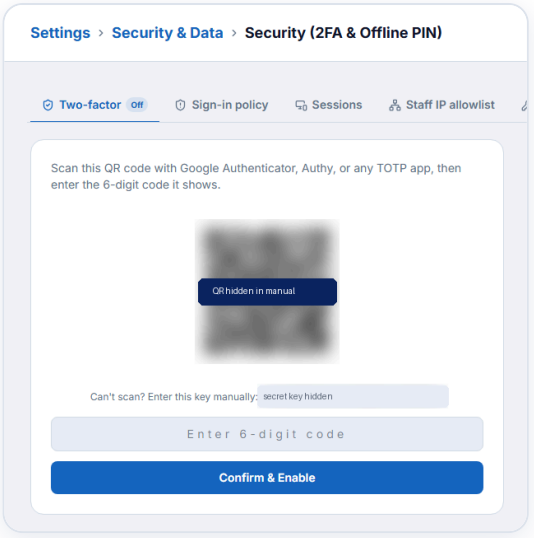

Figure Scan the QR code, then confirm with the 6-digit code (QR hidden in this manual)

> **WARNING**
> Keep your phone safe. If you lose access to the authenticator app, contact support to verify your identity and reset 2FA.

Sign out

Click **Sign Out** at the bottom of the sidebar (or in Settings). Always sign out on a shared computer.

CHAPTER 3

03 First-Run Setup and the Dashboard

The first time you sign in, a short tour and a five-step setup wizard help you get billing-ready. After that, the Dashboard shows the health of the business every day.

Jaldi samjhein (Hinglish quick start)

Pehli baar login par 7-step tour aata hai, phir **Setup Wizard**: business type, GST details, invoice settings, opening stock aur pehla bill. Har step baad mein bhi kar sakte hain. Dashboard par roz ki sales, profit, stock aur dues dikhte hain.

The welcome tour

A 7-card tour explains the main areas: adding your first product, making a sale, customers, finance, reports and settings. Click **Next** to move on or **Skip tour** to close it.

The Setup Wizard

The wizard opens at **Set up your business**. The left side shows the five steps and a progress percentage; you can **Skip** any step and come back later from the Dashboard banner or the Settings page.

Step 1 — Business type

1. Check the **Current type** (General Store for our example).
2. Click **Save & continue**.

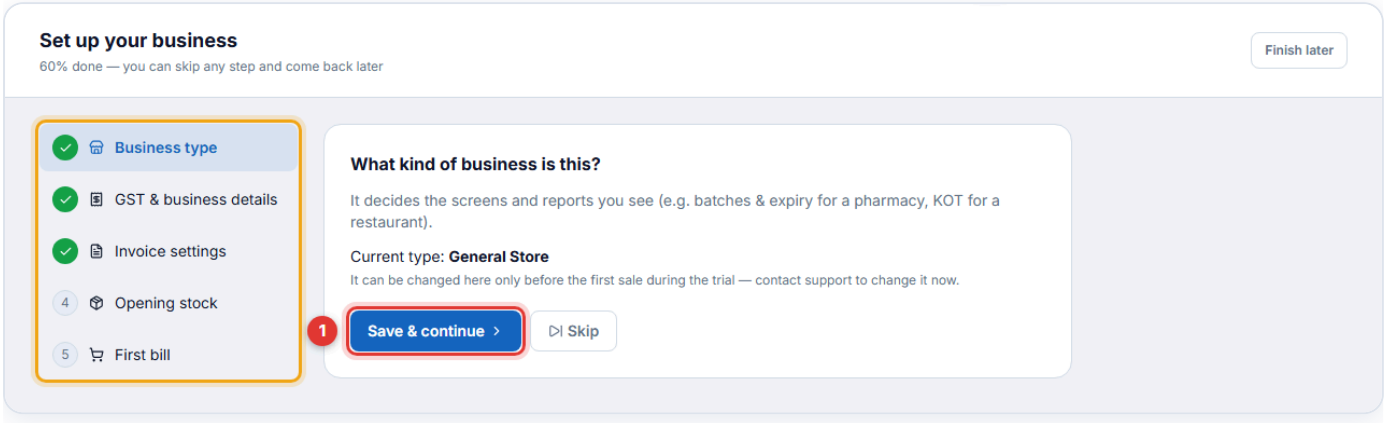

Figure Step 1 — business type

Step 2 — GST and business details

1. Choose the GST registration (1): **Regular GST (Tax Invoice)**, **Composition scheme (Bill of Supply)** or **Not registered**.
2. Enter the 15-character **GSTIN** (2). Its first two digits set your state; the software then uses CGST + SGST for sales inside the state and IGST for other states.

3. Enter the **shop address** (3), **city** and **phone** (4) — they print on every bill.
4. Click **Save & continue** (5).

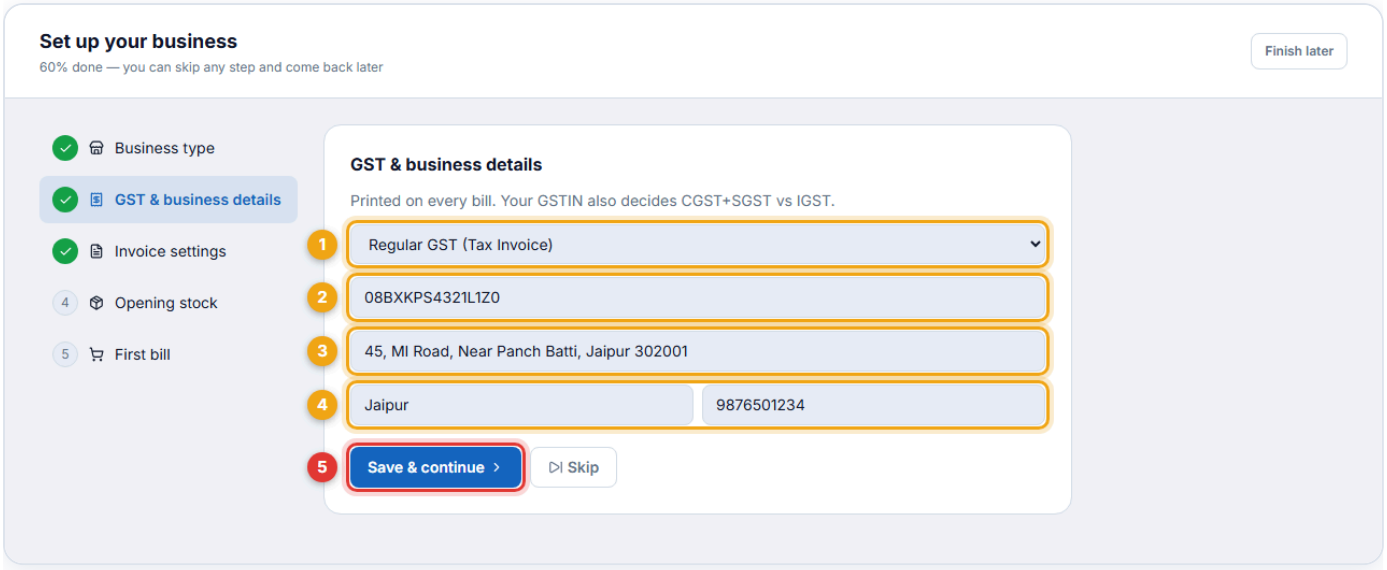

Figure GSTIN 08BXKPS4321L1Z0, 45 MI Road, Jaipur

Step 3 — Invoice settings

1. Type a short **Bill number prefix** (1) — we used **CDE**.
2. Keep **Include financial year** (2) ticked. The preview shows the format: **CDE/2026-27/0001**.
3. Pick the **Sales invoice PDF layout** (3): Detailed (A4) or Compact.
4. Enter your **UPI ID** (4) so a scan-to-pay QR prints on bills.
5. Click **Save & continue** (5).

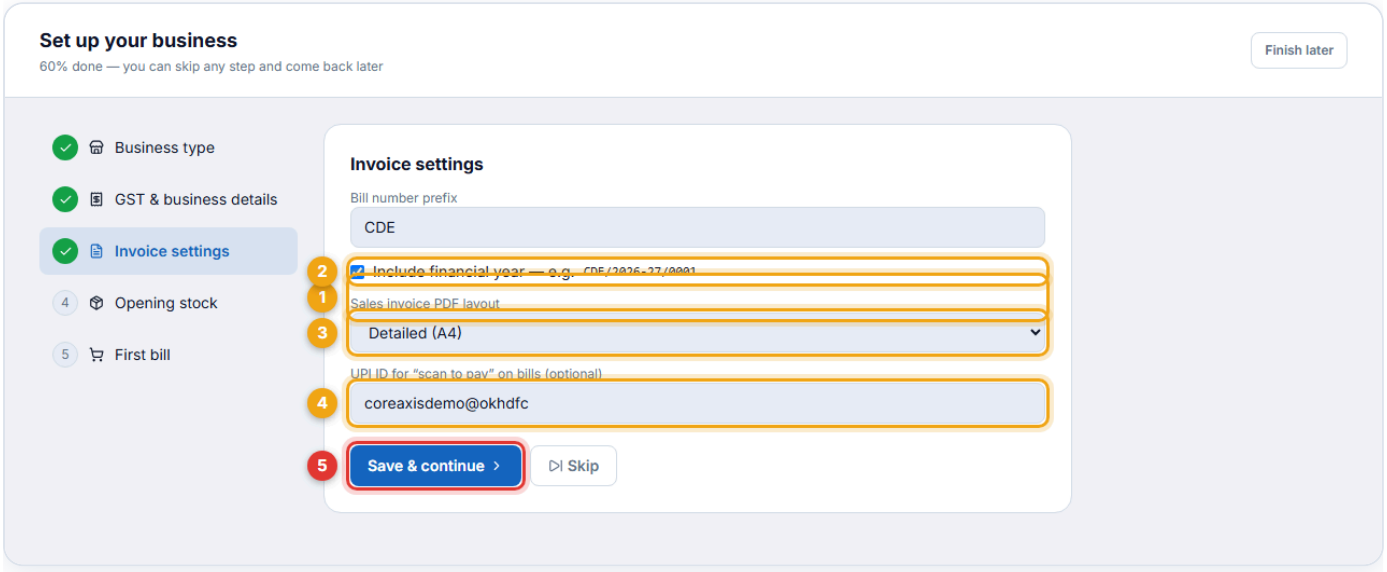

Figure Prefix CDE, financial year on, Detailed A4, UPI coreaxisdemo@okhdfc

Steps 4 and 5 — Opening stock and first bill

1. **Opening stock**: click **Import products** (1) to bring in an Excel / CSV sheet, or **Add a product** (2) to add items one by one (Chapter 8). Then click **I've added my stock**.
2. **First bill**: click **Open POS** and make a test bill (Chapter 6). Then click **Done**.
3. When every step is done or skipped, click **Finish setup**.

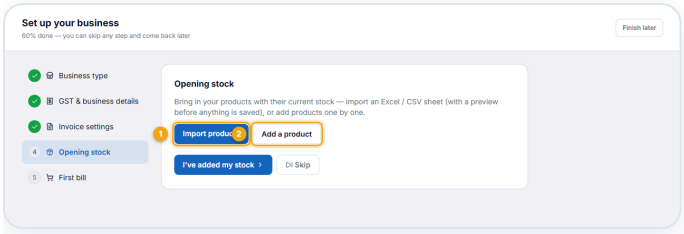

Figure Step 4 — import or add products

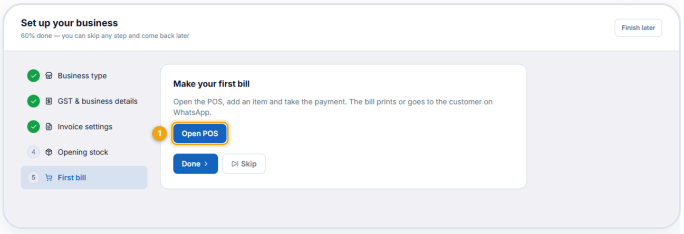

Figure Step 5 — open the POS for the first bill

Tell the system your GST turnover range

If you skipped it at registration, a yellow banner on the Dashboard asks for your GST turnover range. It decides the HSN length on invoices: up to ₹5 crore → 4 digits on B2B invoices; above ₹5 crore → 6 digits on all invoices.

1. Click **Set now** on the banner. It opens **Settings** → **Configuration** → **Financial Year** on the **GST Compliance** tab (1).
2. Click your range (2): **New business**, **Previous FY up to ₹5 Cr** or **Above ₹5 Cr**. It saves at once.
3. Optional: tick **Strict HSN** (3) to block saving a product or B2B bill whose HSN is too short (otherwise you only get a warning).

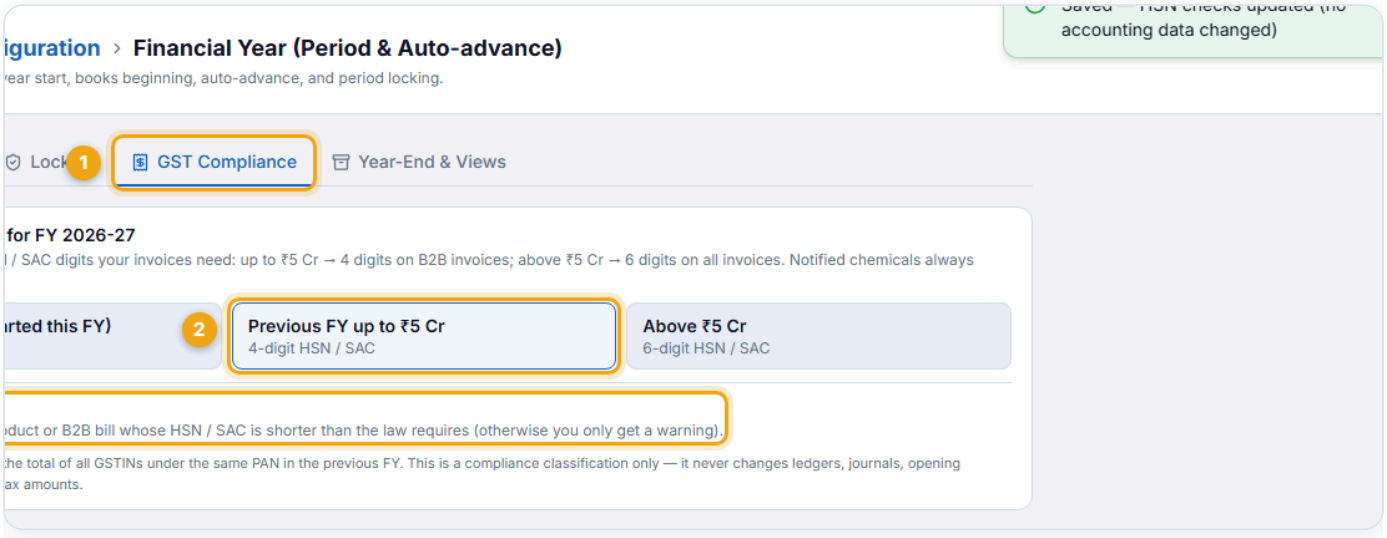

Figure GST turnover range — Previous FY up to ₹5 Cr selected

The Dashboard

The Dashboard opens after sign-in. It is your daily summary.

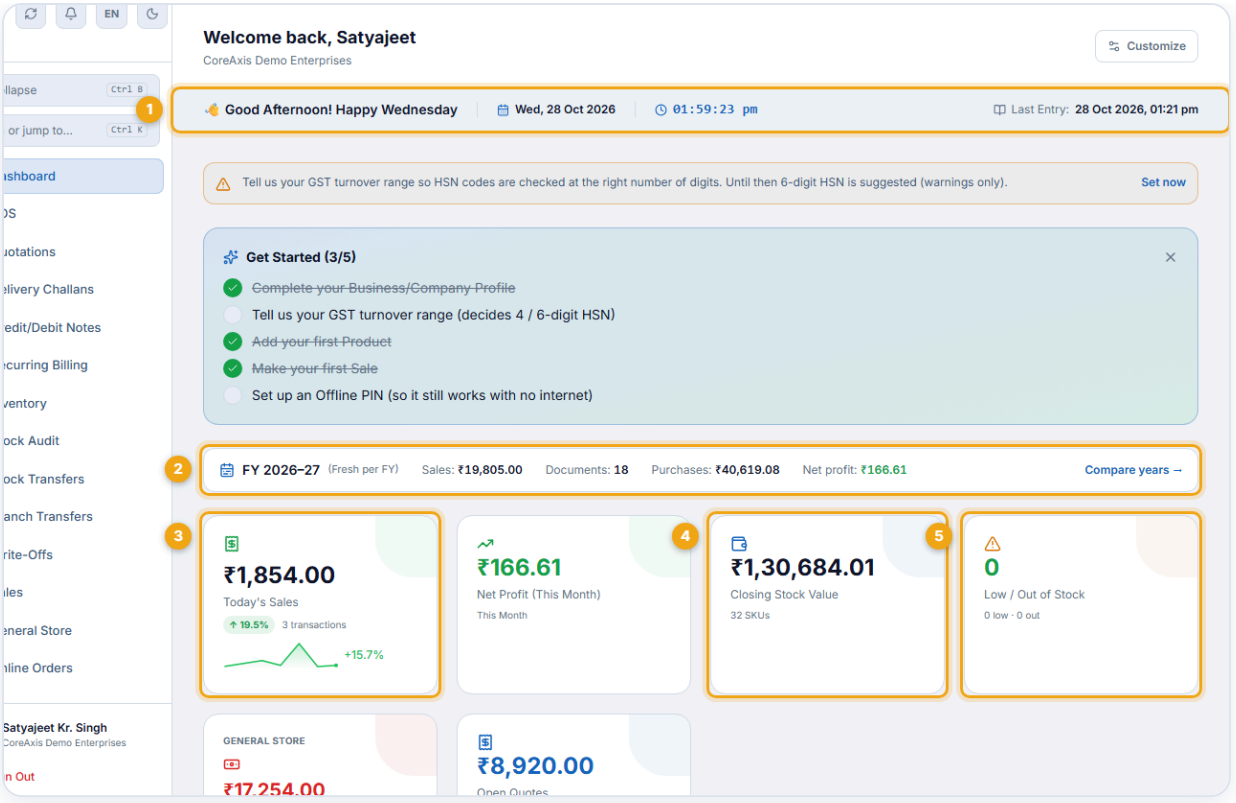

Figure Dashboard of CoreAxis Demo Enterprises

1. **Greeting strip (1)** — today's date, a live clock and **Last Entry**, the time of the most recent voucher.
2. **Financial-year bar (2)** — sales, number of documents, purchases and net profit for the year. **Compare years** shows last year side by side.
3. **Today's Sales (3)** — with the change from yesterday and a mini trend line.
4. **Closing Stock Value (4)** — the value of stock at cost.
5. **Low / Out of Stock (5)** — click to see the items to reorder.
6. Below: **Pending Dues** (khata), **Open Quotes**, the **Sales Trend** chart (daily, weekly, monthly, yearly) and today's **Day Book**.

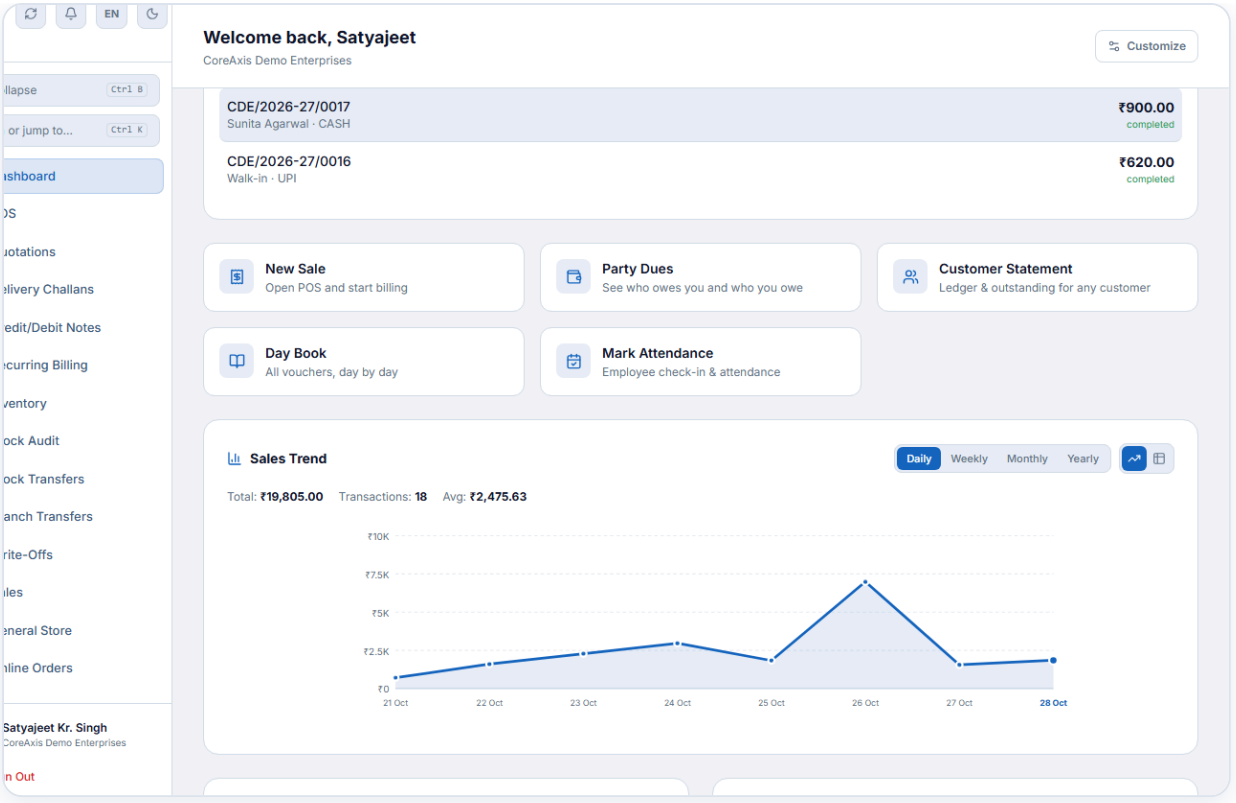

Figure Sales Trend, Day Book and quick links

The Get Started checklist

Until you finish setup, a **Get Started** card lists what is left: complete the business profile, set the GST turnover range, add the first product, make the first sale and set an Offline PIN. Each line ticks itself when done; close the card with **×**.

> **TIP**
> Click **Customize** (top right) to hide, show or reorder Dashboard cards. Each user can arrange their own.

CHAPTER 4

04 Settings — Your Business

Settings hold everything that prints on your bills and controls how the software behaves: business profile, bank and UPI, branches, financial year, invoice format, units, price levels, charges, stock rules, features, notifications and data import.

Jaldi samjhein (Hinglish quick start)

Settings mein 5 group hain: **Business/Company**, **Configuration**, **Security & Data**, **Industry Settings**, **Team & Billing**. Pehle business profile, GSTIN, bank/UPI aur invoice numbering set kijiye — ye har bill par print hote hain.

The Settings page

Click **Settings** at the bottom of the sidebar or press F12. The left card shows the signed-in owner, the serial number, business, branch and currency. The right side groups every setting; type in **Search settings...** to find one quickly.

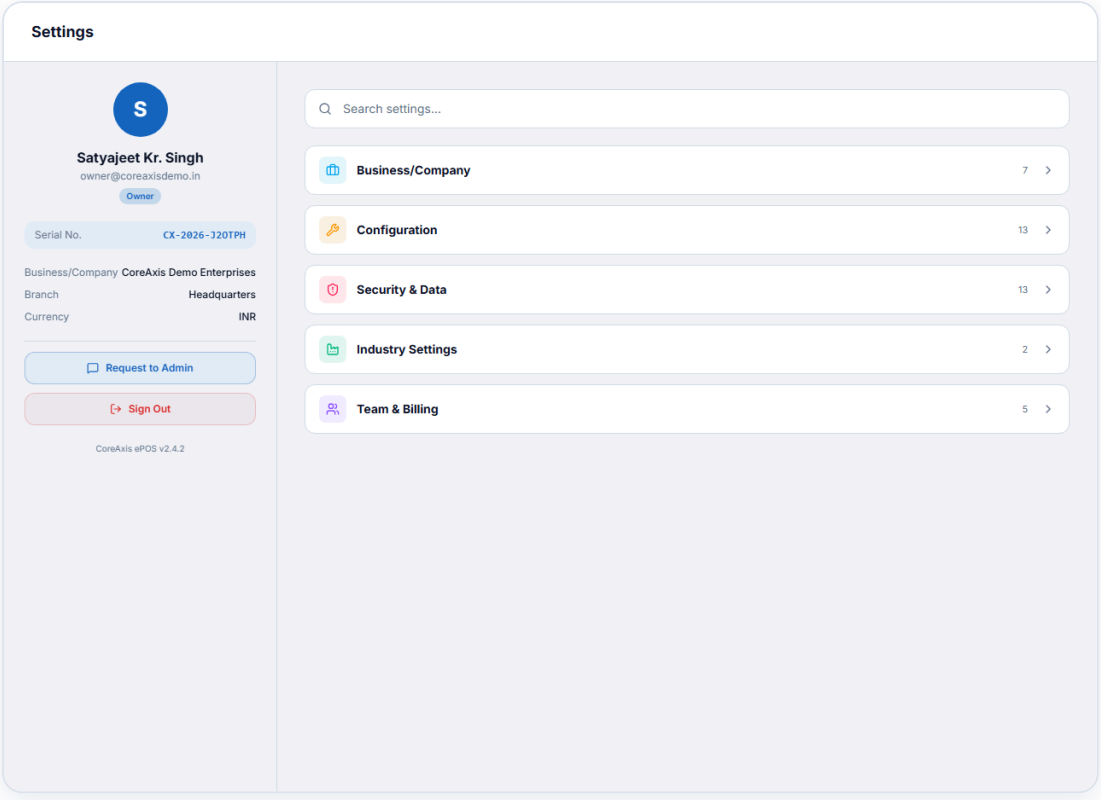

Figure Settings home — five groups

Group	What is inside
Business/Company	Business profile, UPI / bank details, branding, branches, e-invoice
Configuration	Features & configuration (F11/F12), financial year, invoice configuration, units, price levels, inventory rules, notifications, sidebar order
Security & Data	2FA, sign-in policy, sessions, Offline PIN, login activity, audit logs, backup & restore, offline sales, import / export

Group	What is inside
Industry Settings	Business-type options, e.g. bill charges (service / carry bag)
Team & Billing	Team & roles, role permissions, staff access, subscription

Business profile

Settings → Business/Company → Business/Company Profile. Everything here prints on invoices.

1. Upload your **logo** (shown top-left on invoices) and a **signature** (a clear photo on white paper works best).
2. Choose the **Sales Invoice PDF Layout**: Detailed (A4) or Compact (Dense).
3. Check the business name, phone, address and country.
4. On the right, check the **GSTIN** — a green "Valid · Rajasthan" confirms the check digit — and the **GST Registration Type**.
5. Fill licence numbers that apply to you: Drug Licence (pharmacy), FSSAI (food), CIN, Udyam (MSME) and any other registration.
6. Click **Save Changes**.

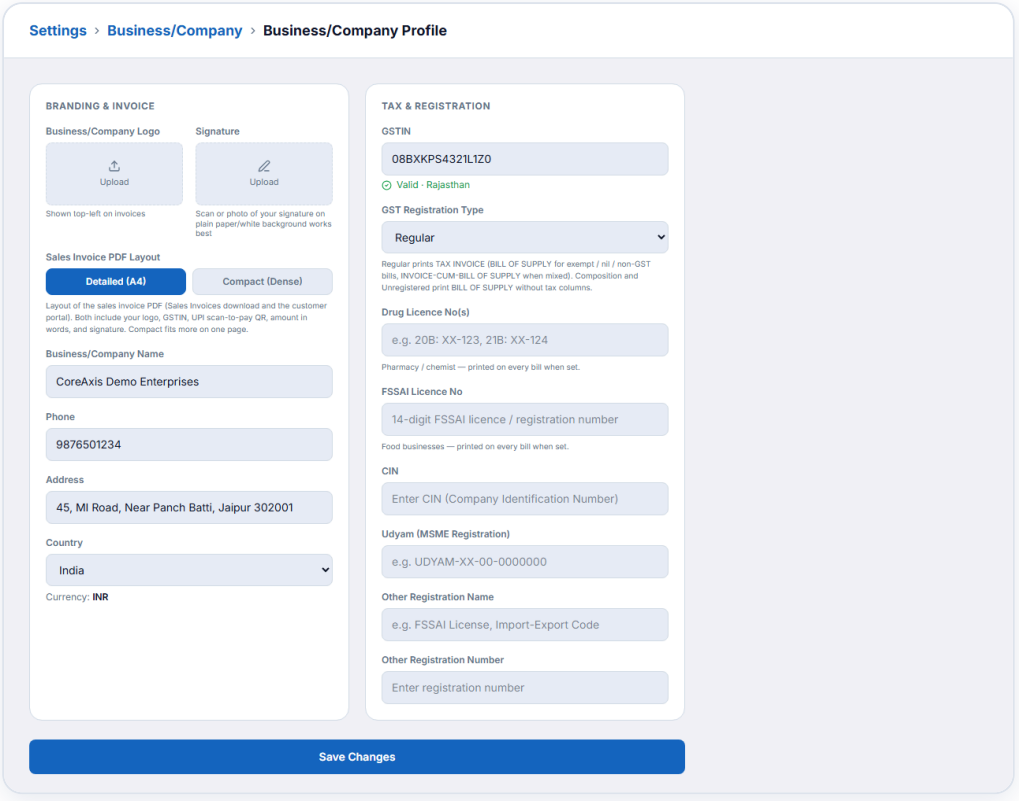

Figure Business/Company Profile

UPI and bank details

Settings → Business/Company → UPI / Bank Details lists the bank accounts that print on invoices, with account number, IFSC and UPI. Tick **Show bank details on invoices** for B2B customers who pay by transfer.

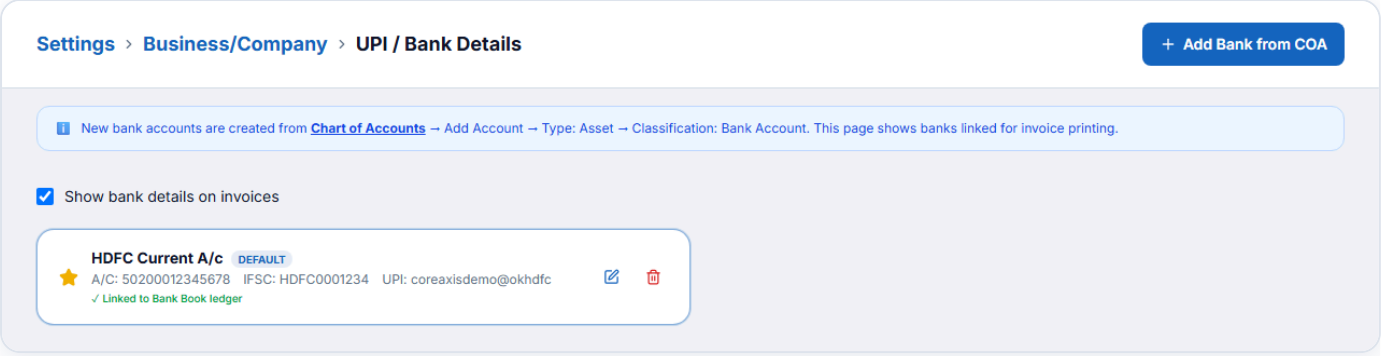

Figure HDFC Current A/c — default, linked to the Bank Book ledger

> **NOTE**
> New bank accounts are created in **Finance → Chart of Accounts → Add Account** (type Asset, classification Bank Account) and then appear here.

Branches

Each shop, outlet or warehouse can be a branch with its own stock, bills and cash. The first branch is **Headquarters**.

1. Open **Settings → Business/Company → Branches** (the page is titled **Switch Branch**).
2. Click **Add Branch** (1).
3. Enter the **Branch Name**, an optional short **Branch Code**, address, city, phone and email.
4. Save. The new branch appears in the list (2). Click a branch to switch to it.

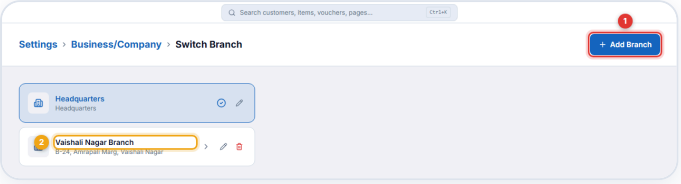

Figure Headquarters and Vaishali Nagar Branch

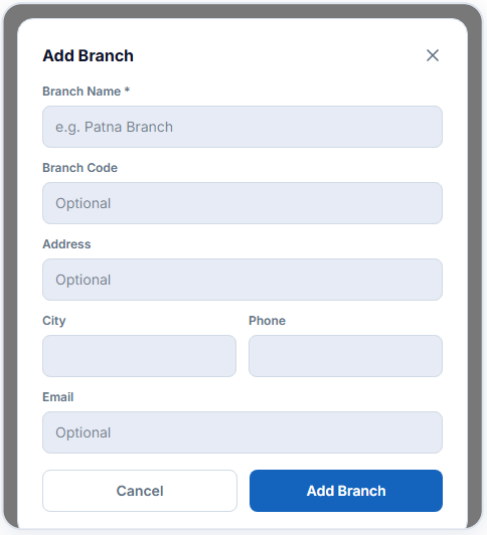

Figure Add Branch

WORKED EXAMPLE **Second outlet in Vaishali Nagar**

1. Branch Name: Vaishali Nagar Branch · Code: VSN
2. Address: B-24, Amrapali Marg, Vaishali Nagar, Jaipur · Phone 9876501235
3. Stock is now kept separately; Inventory shows “Stock: my branch / all branches”.

TIP

Switch the working branch any time from the status bar at the bottom. Reports can show one branch or all branches.

Financial year

Settings → Configuration → Financial Year has four tabs: **Year & Period**, **Locking**, **GST Compliance** and **Year-End & Views**.

1. **Financial Year Begins** — April 1 for India (change only if your books follow another year).
2. **Current Working Period** — the year reports and the day book open in. Change it any time with **Alt** + **F2** / **Alt** + **F1** or the FY selector in the status bar.
3. **Auto-advance** — moves to the new year automatically on 1 April.
4. **Books Beginning From** — the first year you kept accounts in CoreAxis.
5. **Locking** tab — lock a finished year (or have the previous year lock automatically) so nobody can add or edit entries in it.

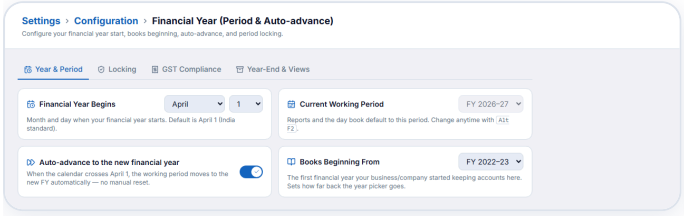

Figure Year & Period

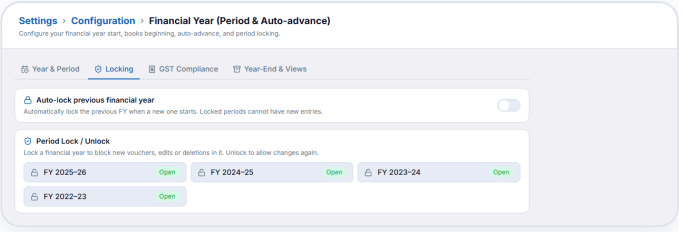

Figure Locking

WARNING

Lock a year only after your accountant has finalised it and GST returns are filed. A locked year refuses new or edited vouchers.

Invoice configuration and numbering

Settings → Configuration → Invoice Configuration decides how bills look. Click **Preview** (top right) at any time to see a sample.

Number format

1. Set the **Prefix** (letters, digits, - and / only), the **Separator** and the **Number digits**.

2. Choose the **Financial year format** (2026-27, 2026-2027 or 26-27) and tick **Include Financial Year in the number**.

3. Keep **restart numbering every financial year** ticked so numbers start again from 0001 on 1 April.

4. Check the preview — **Next invoice number will look like CDE/2026-27/0001** — and click **Save Number Format**.

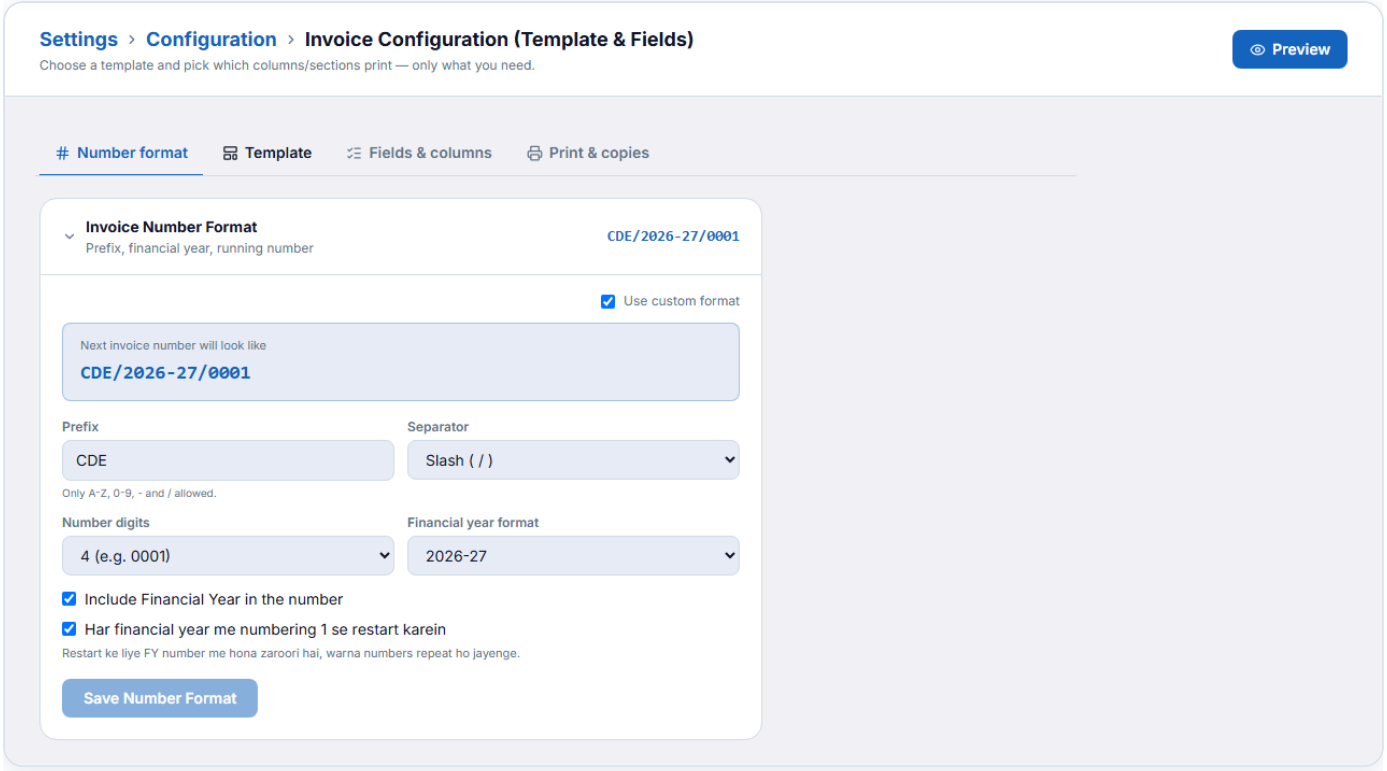

Figure Invoice Number Format — CDE/2026-27/0001

Template, fields and printing

- **Template** — Modern, Simple, Classic, Formal GST, Minimal, Royal, MARG Style, B2B Professional. Recommended ones for your business type are at the top.
- **Fields & columns** — choose which table columns, tax totals, payment & QR, signatures, transport and footer details print; write your **Terms & Conditions** and **Jurisdiction**; pick a signature size.
- **Print & copies** — thermal paper width (58 mm or 80 mm), watermark (CoreAxis, your logo or none) and extra copies (Original for Recipient, Duplicate for Transporter, Triplicate for Supplier).

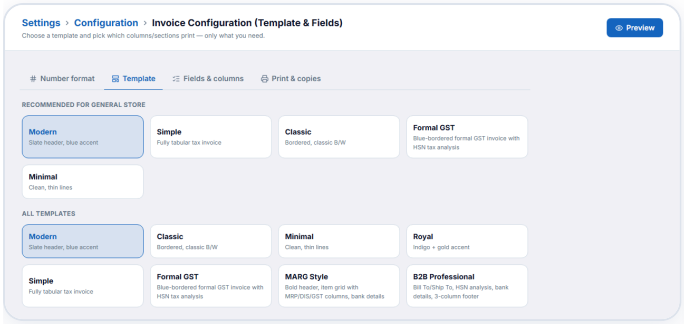

Figure Invoice templates

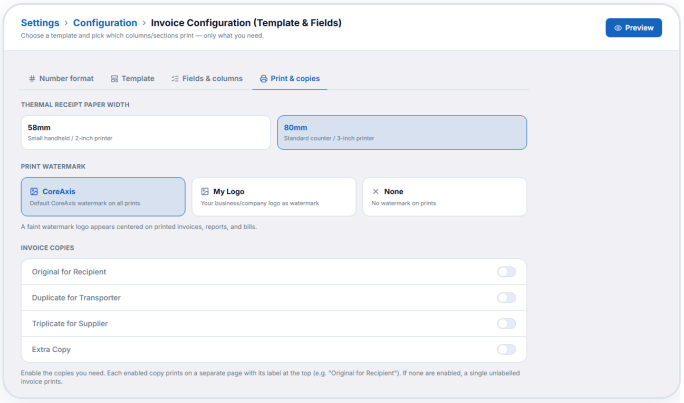

Figure Print & copies — 80 mm thermal

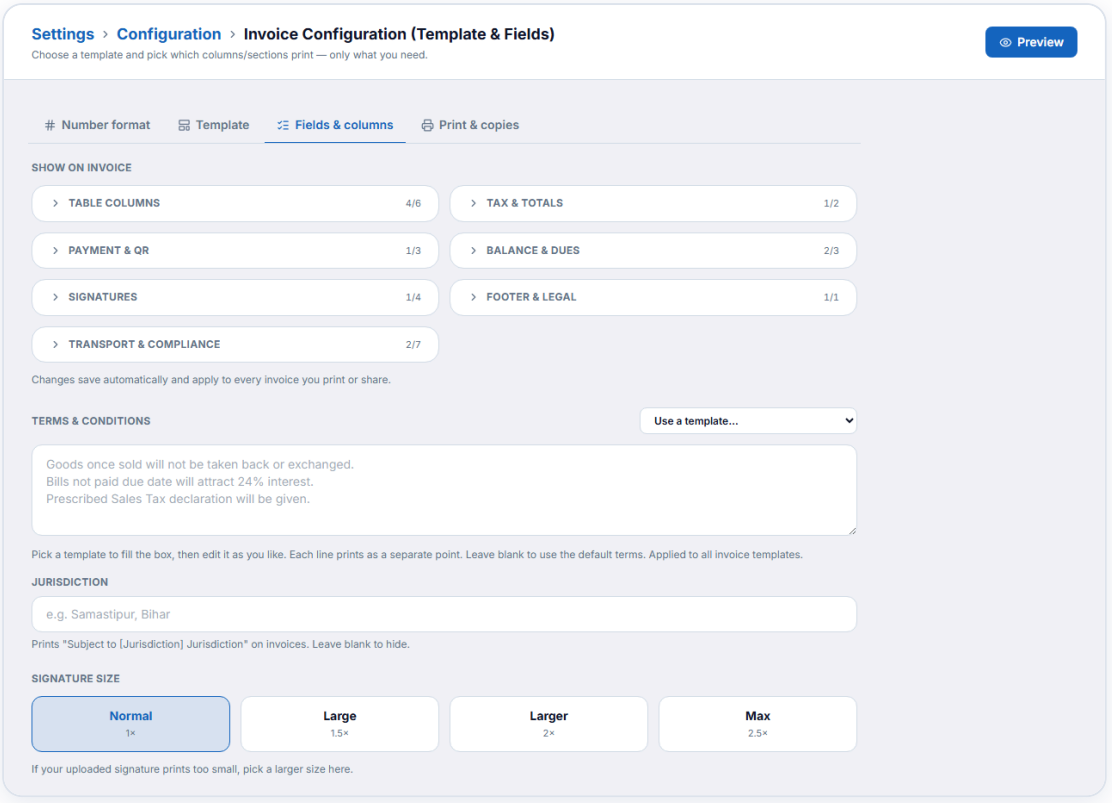

Figure Fields & columns, terms and jurisdiction

Features and configuration (F11 / F12)

Settings → Configuration → Features & Configuration lists every switch in one place, grouped like Tally: Accounting & Vouchers, Inventory & Stock, Taxation, Billing and more. Use the search box at the top to find an option.

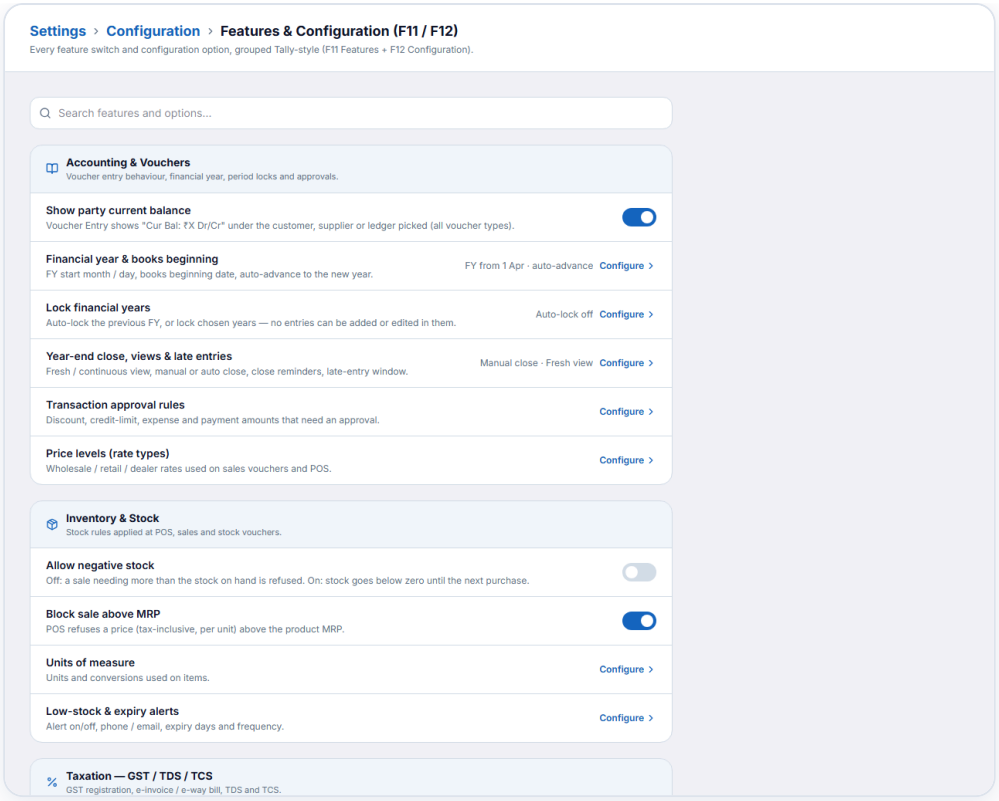

Figure Features & Configuration

- **Show party current balance** — vouchers show the customer's or supplier's balance under the name.
- **Transaction approval rules** — discounts, credit-limit overrides, expenses or payments above a limit need an owner's approval.
- **Allow negative stock** and **Block sale above MRP** — the stock rules (also under **Inventory Settings**).

Turn modules on or off

Settings → Configuration → Feature Configuration shows or hides menu modules (POS, Quotations, Delivery Challans, Recurring Billing, Stock Audit, HR & Payroll, Projects …). Turning a module off only hides it — your data stays safe. **Sidebar Menu Order** lets you drag the menu into the order your team prefers.

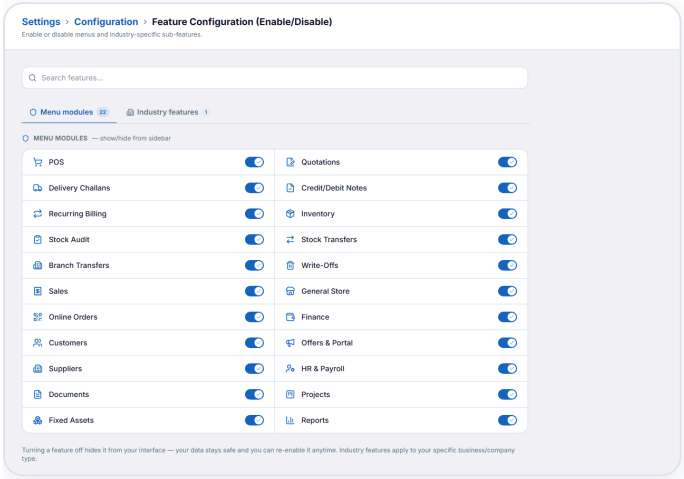

Figure Feature Configuration

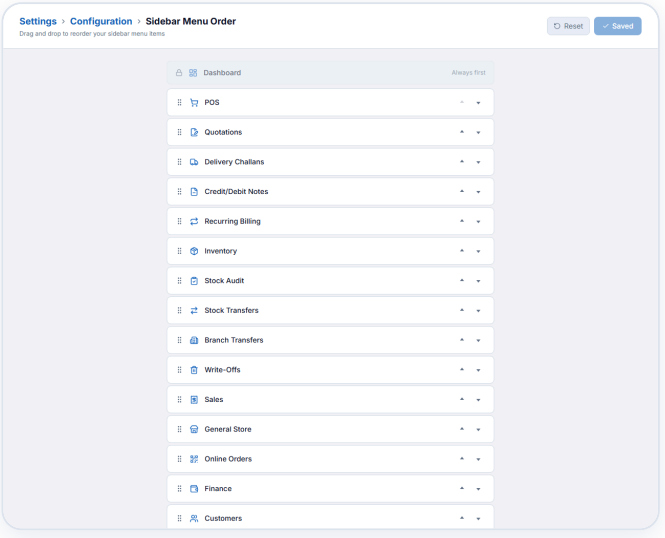

Figure Sidebar Menu Order — drag to reorder

Units, price levels and price list

Units

Settings → Configuration → Manage Units lists GST units (PCS, KGS, LTR, BOX, BTL, DOZ …). Add custom or compound units (e.g. 1 BOX = 12 PCS) with **Add Custom Unit**.

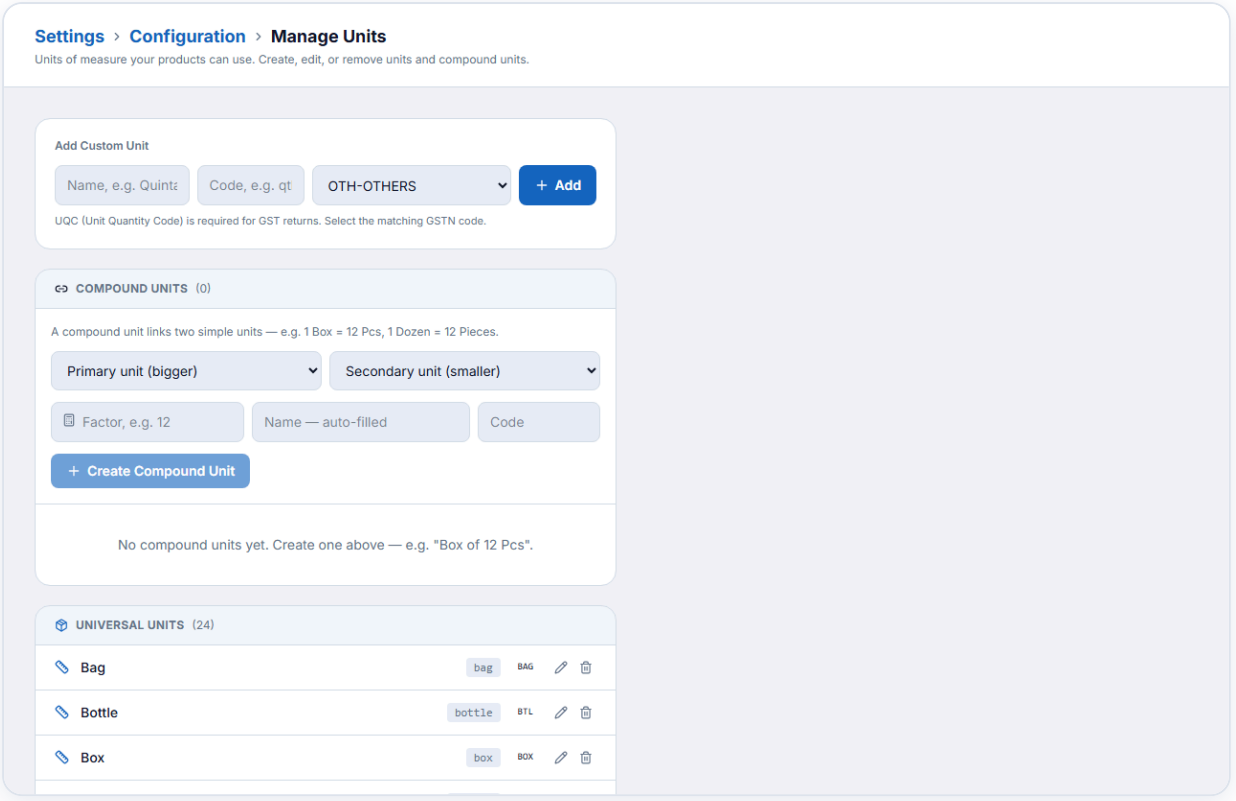

Figure Manage Units

Price levels (rate types)

1. Open **Settings → Configuration → Price Levels**.
2. Type a name such as **Wholesale** and click **Add**. Optionally make one the default for new customers.
3. Set each item's Wholesale rate on the product form, or in bulk with **Open Price List**.
4. Attach the level to a customer (Rate Type in the customer form). Their bills then use that rate automatically; the POS **Rate** box also lets you switch for one bill.

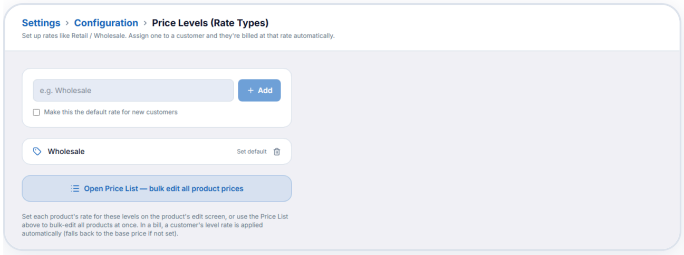

Figure Price Levels — Wholesale

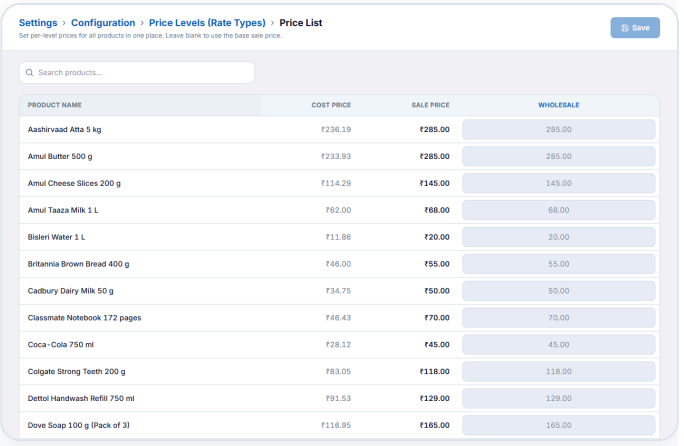

Figure Price List — bulk-edit all items

Bill charges and stock rules

Settings → Industry Settings → Bill Charges adds an optional **Service charge** or a **Carry bag charge** to bills. Each prints as its own line with HSN / SAC and GST and goes to its own income ledger.

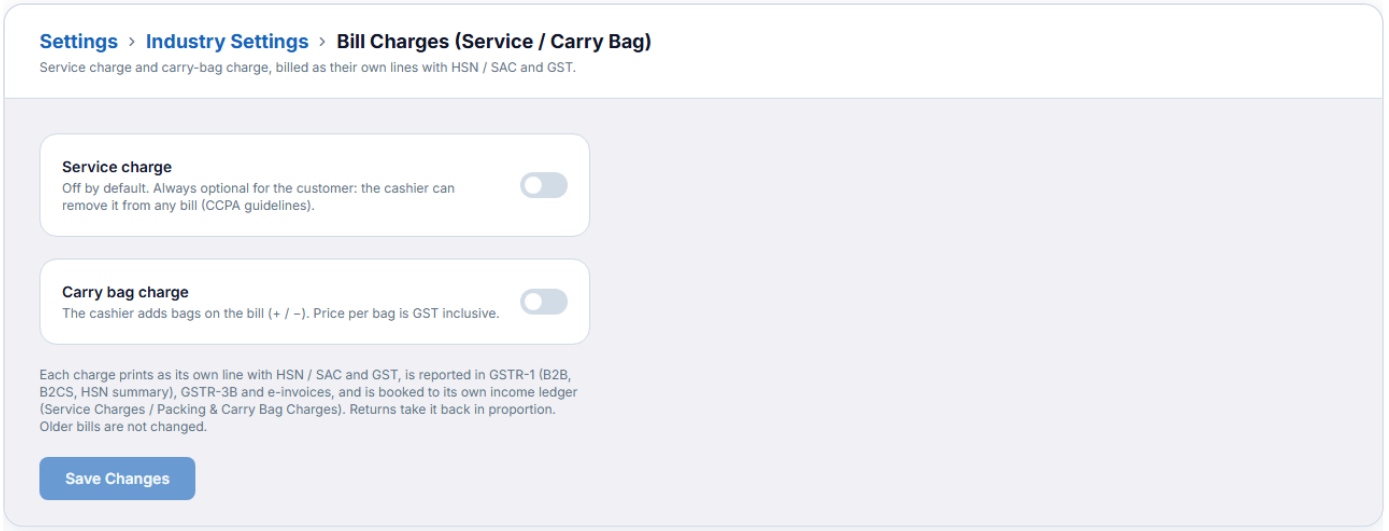

Figure Bill Charges — service charge and carry bag

> **NOTE**
> By consumer guidelines a service charge must always be optional — the cashier can remove it from any bill.

Settings → Configuration → Inventory Settings: **Allow negative stock** (sell even when the system shows zero) and **Block sale above MRP**.

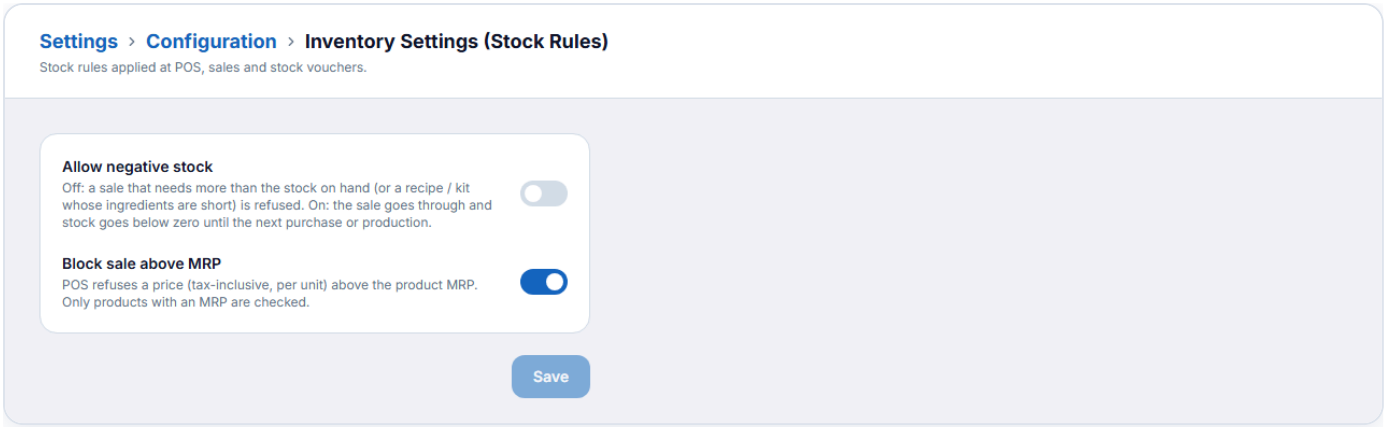

Figure Inventory Settings

Notifications: SMS, WhatsApp, email and online payments

Settings → Configuration → SMS & WhatsApp Notifications has tabs for **Payments (Razorpay)**, **SMS**, **WhatsApp**, **Reminders** and **Email**.

- **Razorpay** — connect your own Razorpay account so customers can pay invoice links and online orders.
- **Email** — weekly business summary, daily low-stock & expiry alert, email receipts to customers, dues reminders, purchase orders to suppliers.
- **Reminders** — automatic dues reminders for khata customers.

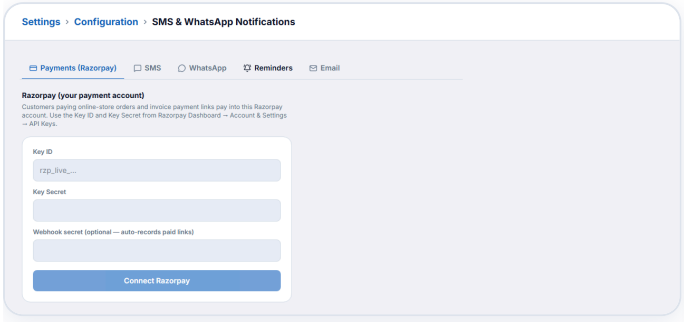

Figure Payments (Razorpay)

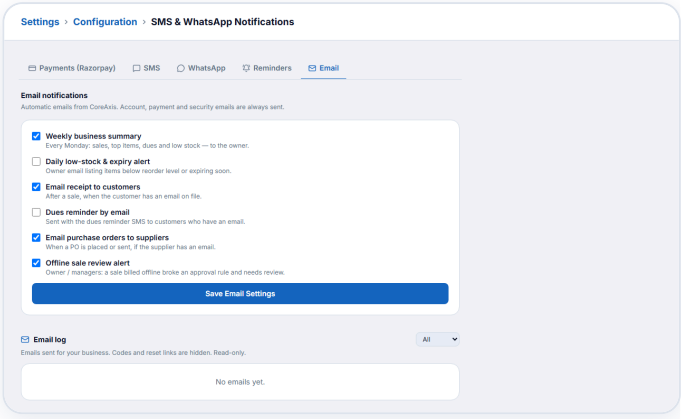

Figure Email notifications

Branding and e-invoice

White-Label Branding (on plans that include it) lets you set your own brand name and colour and hide “Generated by CoreAxis ePOS” on invoices. **E-Invoice (GSP / IRP)** stores the credentials from your GST Suvidha Provider so IRNs are generated directly; without them you can still download the e-invoice JSON and upload it on the GST portal.

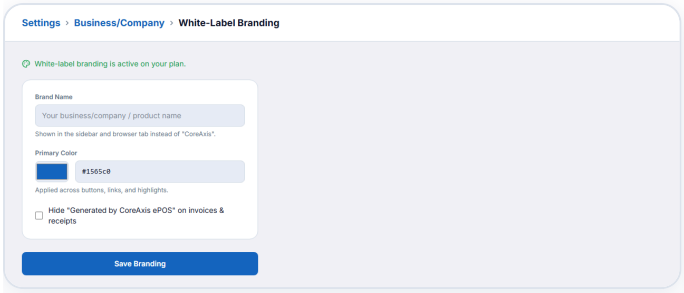

Figure White-Label Branding

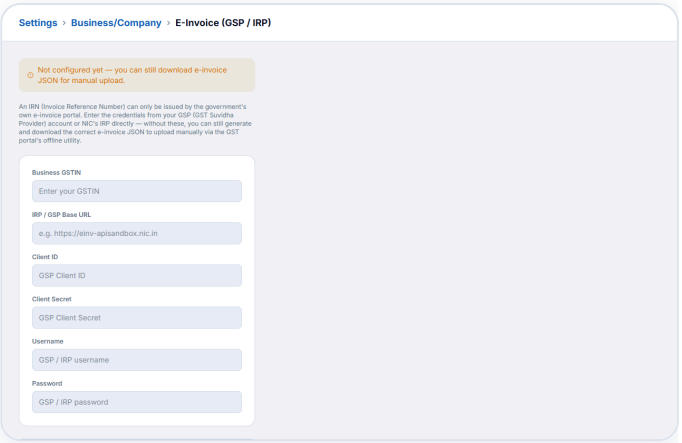

Figure E-Invoice credentials

Import your existing data

Moving from another software or Excel? **Settings** → **Import from File** accepts CSV, Excel (.xlsx) and Tally XML.

1. Choose what to import: Products / Stock Items, Customers, Suppliers, Opening Balances, Sales or Purchase transactions, Other Vouchers, HSN codes or Units.
2. Download the **Sample CSV** if you need a template, fill it and upload the file.
3. Map your columns to CoreAxis fields.
4. Review every row: New, Duplicate or Error. For duplicates choose Skip, Merge or Overwrite.
5. Confirm. Nothing is saved until you confirm.

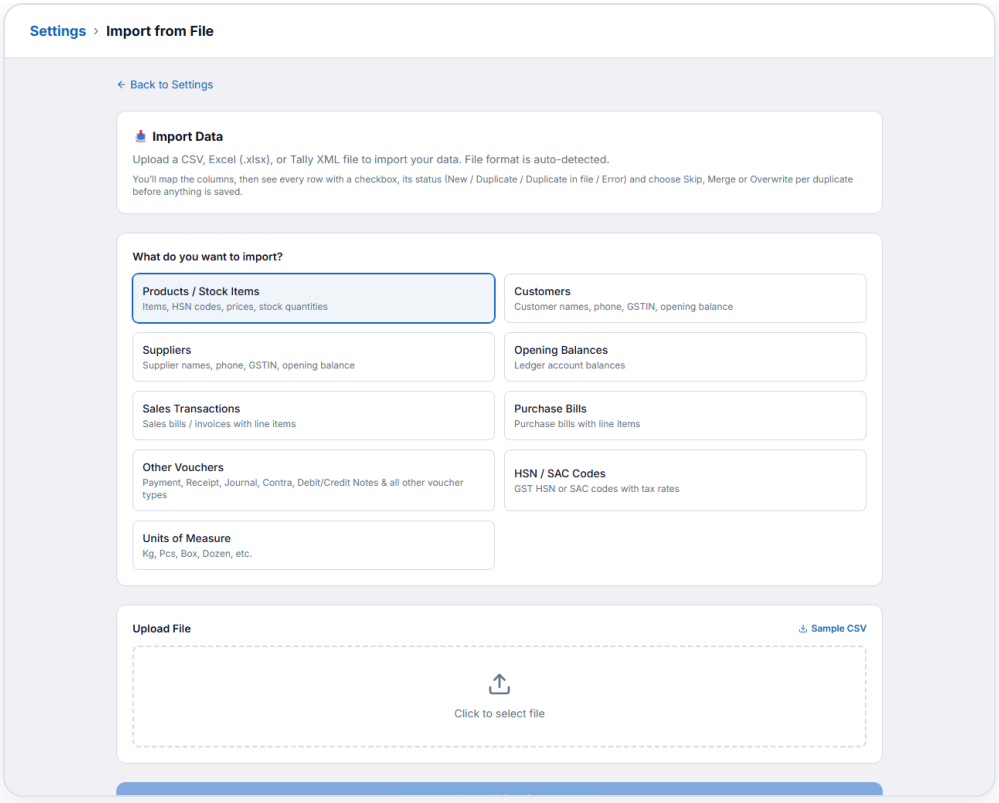

Figure Import Data

CHAPTER 5

05 Users, Roles, Security and Your Data

Give every staff member their own login, decide exactly what each role can see and do, watch sign-in activity and keep your data backed up.

Jaldi samjhein (Hinglish quick start)

Har staff ko alag login dijiye. **Team & Roles** mein user banaiye, **Staff Access** se decide kijiye kaunse menu dikhenge, **Role Permissions** se create/edit/delete ki permission. Backup aur audit log bhi yahin hain.

Add a team member

1. Open **Settings** → **Team & Billing** → **Team & Roles**. The top shows the seats on your plan.
2. Click **Add** (1).
3. Enter the **Full Name**, **Email** and a starting **Password**.
4. Choose the **Role** (Staff, Accountant or a custom role such as Cashier) and the **Home branch**. To keep someone to one branch, restrict them to it.
5. Save. Give the person their email and password; they can change the password after signing in.
6. Use the **Active / Inactive / Suspended** box on a row (2) to pause a login without deleting it.

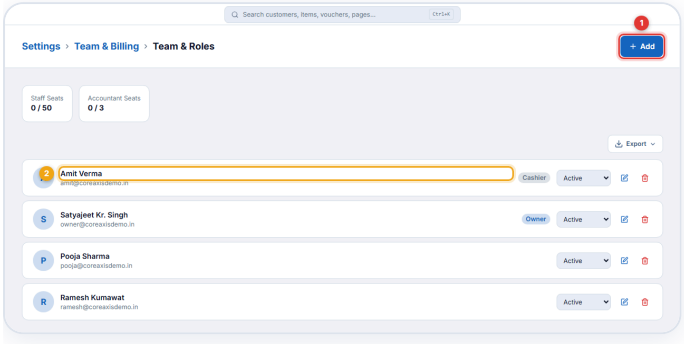

Figure Team & Roles — owner, cashier and staff

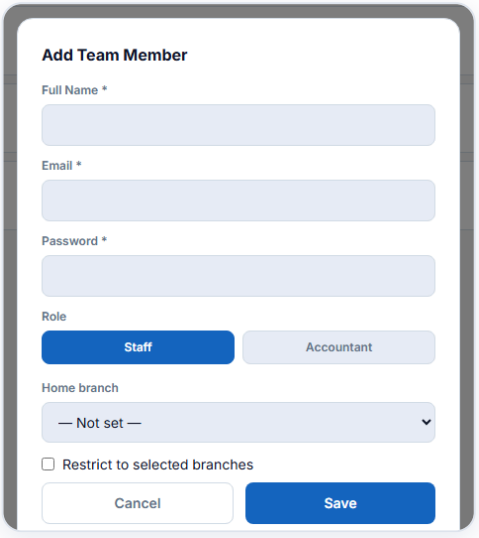

Figure Add Team Member

WORKED EXAMPLE **Cashier for the MI Road counter**

1. Name: Amit Verma · Role: Cashier · Home branch: Headquarters (restricted)
2. Amit can bill at the POS, look up customers and check stock, but cannot open Finance, Reports or Settings.

Staff Access — which menus a role sees

1. Open **Settings → Team & Billing → Staff Access**.
2. Pick the role at the top (Accountant, Cashier, Staff …).
3. Switch each module on or off. Modules with “options” (POS, Inventory, Sales, Finance, Customers, Reports) open to finer switches — for example a cashier can create a sale but not cancel one.
4. Click **Save access**.

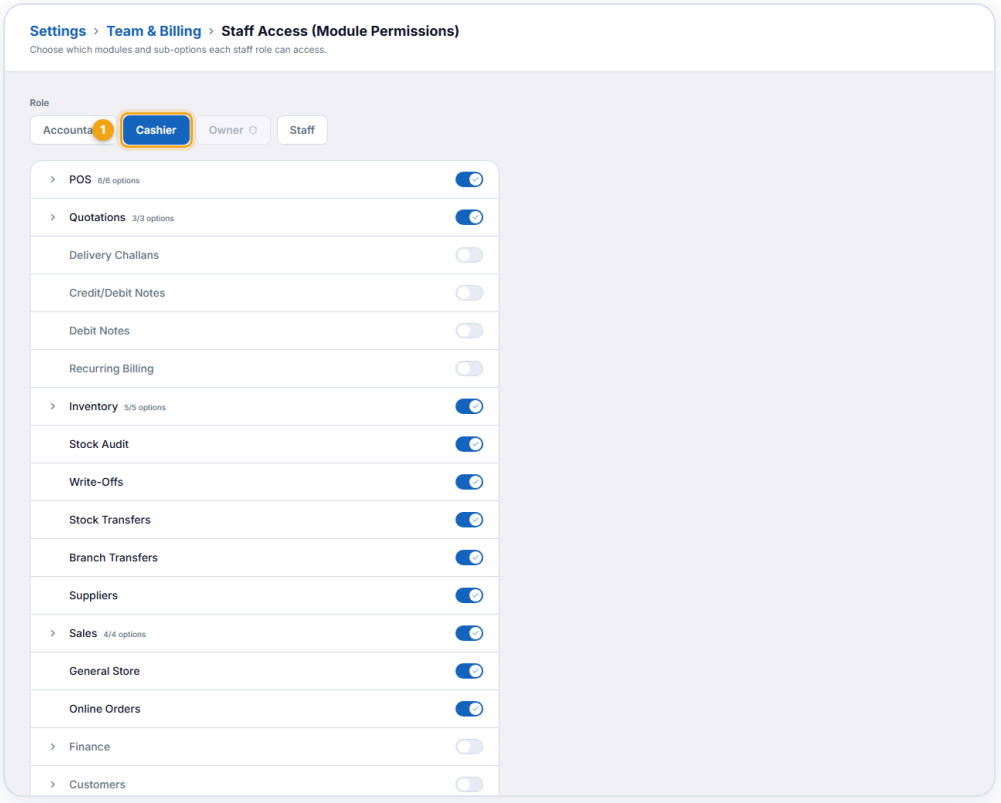

Figure Staff Access for the Cashier role

Role Permissions — what a role can do

Settings → Team & Billing → Role Permissions is a grid of modules against **Access, Create, Read, Update, Delete, Export**. Select a role (1), tick the boxes, and the change applies to everyone with that role. Click **New Role** to create your own role.

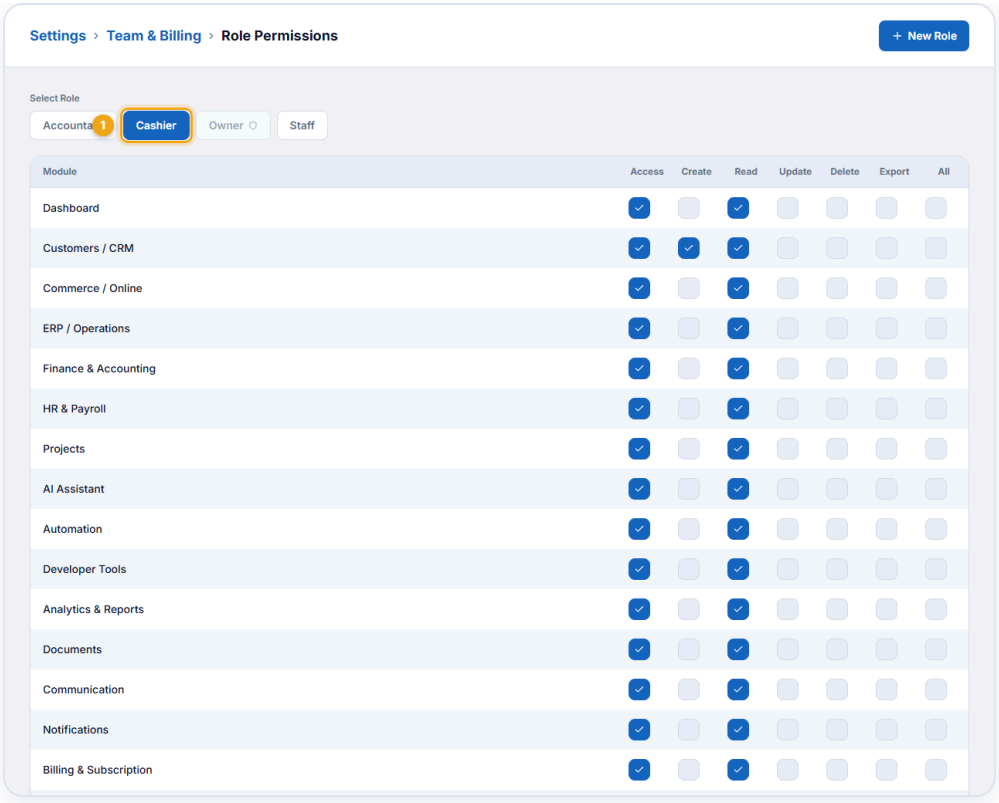

Figure Role Permissions — Cashier

This is what Amit (Cashier) sees after signing in — only the menus the role allows, with his name and role in the status bar:

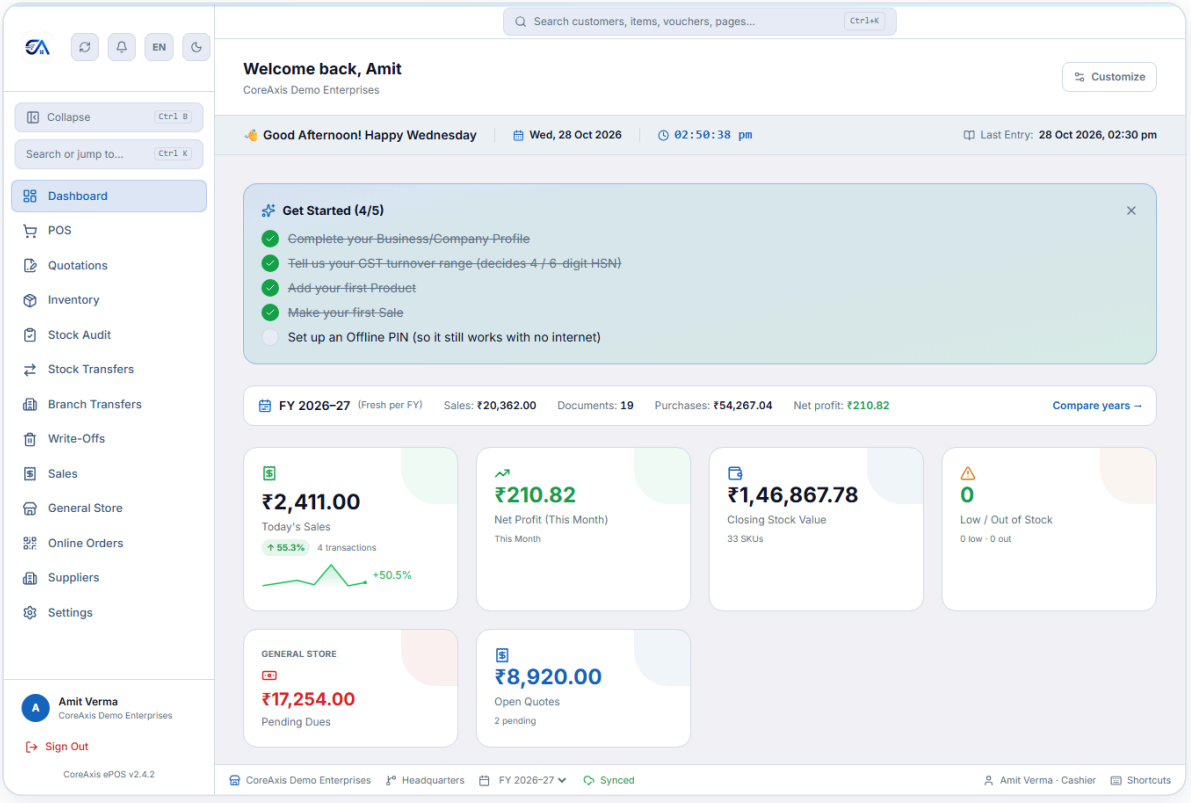

Figure The cashier's own view

> **TIP**
> Start strict and open more only when needed. Keep Delete and Export for the owner and accountant.

Security: sign-in policy, sessions and Offline PIN

Settings → **Security & Data** → **Security** has five tabs.

Tab	Use it to
Two-factor	Turn on authenticator codes at sign-in (Chapter 2)
Sign-in policy	Rules such as password strength and when a new-device code is required
Sessions	See where the account is signed in and end a session you do not recognise
Staff IP allowlist	Allow staff to sign in only from your shop's internet connection
Offline PIN	A short PIN that unlocks the app on this device when there is no internet

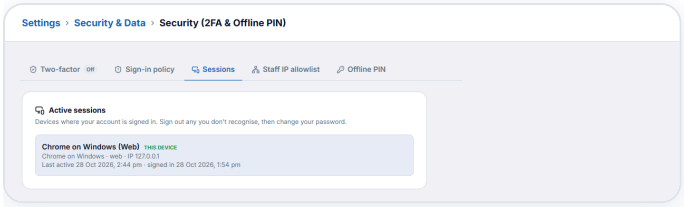

Figure Sessions

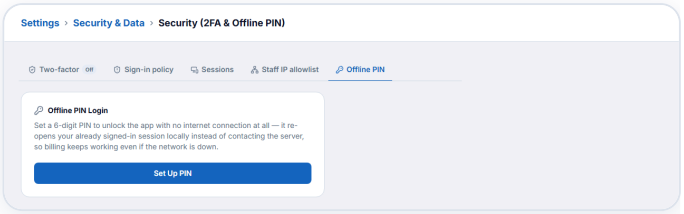

Figure Offline PIN

Login activity and audit logs

Login activity lists every sign-in with user, device, IP and flags (new device, new country, impossible travel). **Audit Logs** record important actions — logins, products created, roles changed — with user, time and severity. **Edit Log** keeps the before and after of every edited voucher.

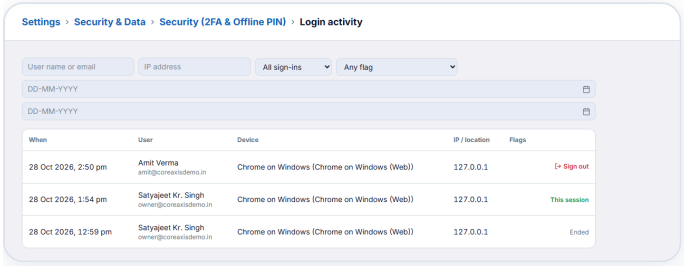

Figure Login activity

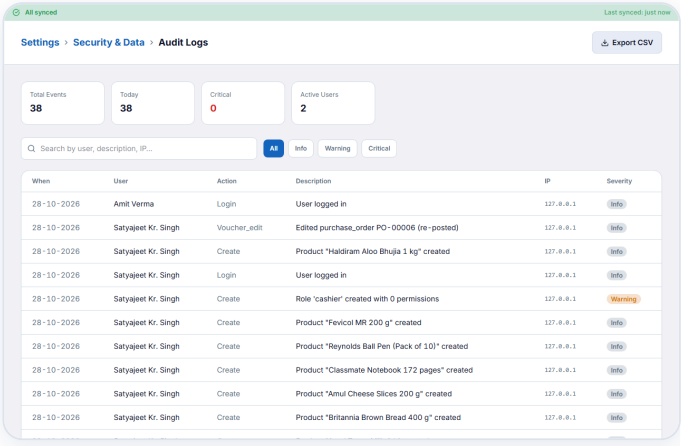

Figure Audit Logs

Backup, restore and sync

- **Automatic backup** — an encrypted safety copy is saved on the device each time you open the app online. **Back up now** makes one immediately.
- **Manual backup** — **Download Backup** saves products, customers, sales, vouchers and accounts in one .json file.
- **Restore** — upload a backup file to bring back missing records. Restore only adds what is missing; it never deletes or overwrites.

- **Sync Status** — shows whether this device is online, offline sales waiting to be sent, and a **Sync now** button.

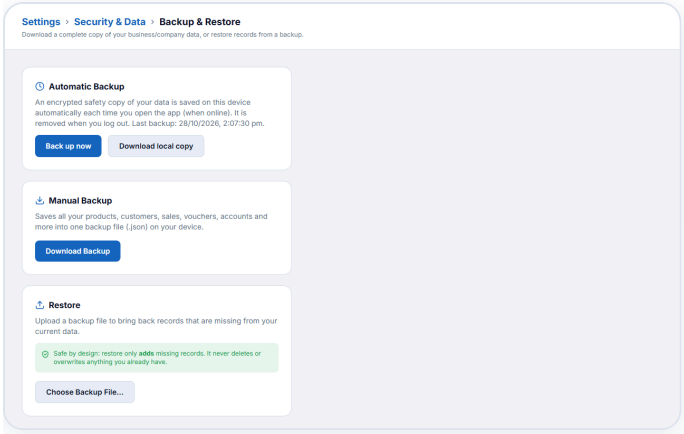

Figure Backup & Restore

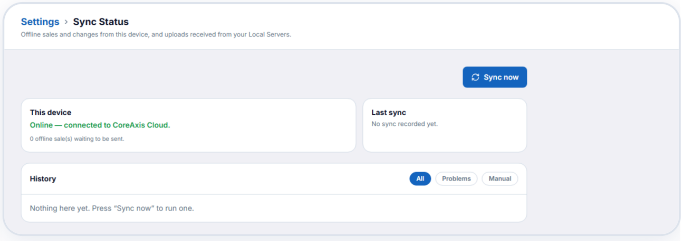

Figure Sync Status

> **WARNING**
> Keep the downloaded backup file private — it contains your full business data.

Subscription

Settings → Team & Billing → Subscription shows the active plan (Enterprise Lifetime in the example), lets you change plan, buy add-ons, turn on autopay or activate with a code.

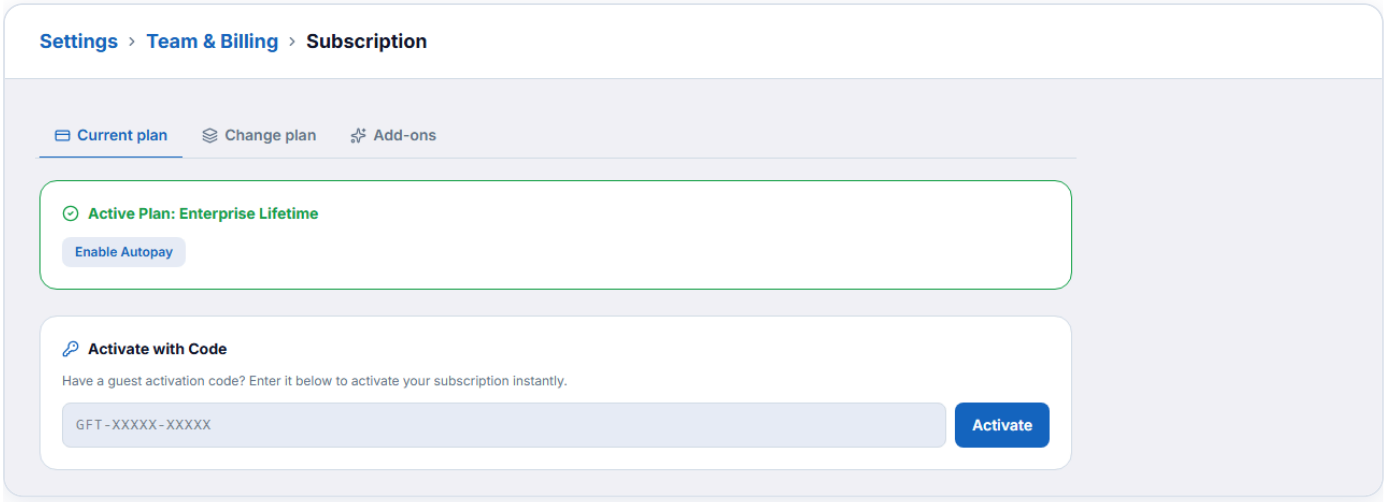

Figure Subscription

CHAPTER 6

06 POS Billing

The POS (point of sale) is the billing counter. This chapter takes you through a complete bill from CoreAxis Demo Enterprises: customer, items by name, barcode and the stock list, quantity and discounts, split payment, checkout and printing — plus hold, credit and new-customer shortcuts.

Jaldi samjhein (Hinglish quick start)

POS kholne ke liye sidebar se **POS** ya `g` `p`. Party chuniye (ya walk-in), item ka naam/barcode type karke `Enter`, quantity daaliye, payment mode chuniye aur **Checkout** (`F4`). Bill hold: `F5`, naya bill: `F2`.

The POS screen

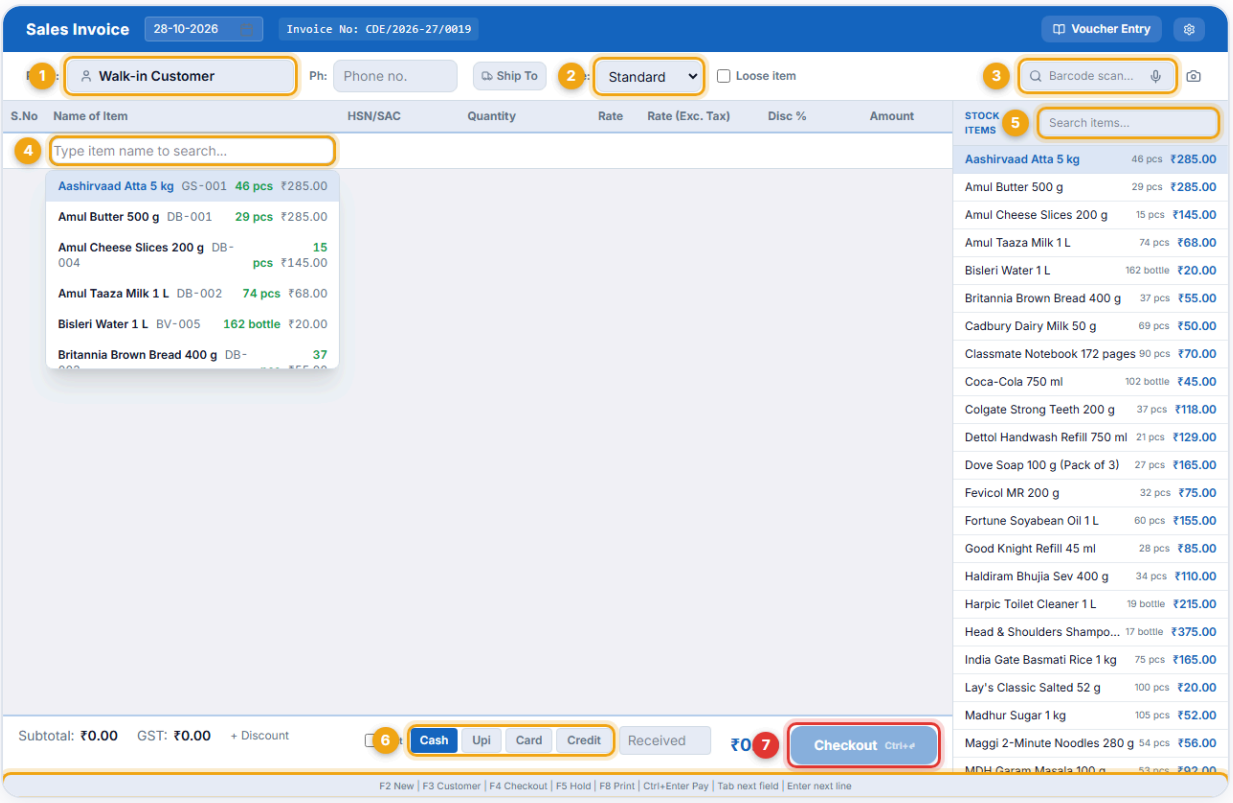

Figure POS — Sales Invoice CDE/2026-27/0019 ready

1. **Party (1)** — leave it as **Walk-in Customer** or search a customer by name or phone.
2. **Rate (2)** — Standard or a price level such as Wholesale.
3. **Barcode scan (3)** — for a USB / Bluetooth barcode scanner; the camera icon scans with a webcam.
4. **Item line (4)** — type an item name, SKU or barcode.
5. **Stock items (5)** — the item list with stock and price; click an item to add it.

6. **Payment mode (6)** — Cash, UPI, Card or Credit; tick **Split** to divide the payment.
7. **Checkout (7)** — saves the bill (F4 or Ctrl + Enter).
8. **Shortcut bar (8)** — F2 New · F3 Customer · F4 Checkout · F5 Hold · F8 Print.

> **NOTE**
> The top bar shows the bill date and the next invoice number. The date can be changed for a back-dated bill if your role allows.

Worked example: a complete bill

WORKED EXAMPLE **Bill CDE/2026-27/0019 for Priya Mehta**

1. Aashirvaad Atta 5 kg — 1 × ₹285 (searched by name)
2. Maggi 2-Minute Noodles 280 g — 2 × ₹56 (barcode 8901058862317)
3. Cadbury Dairy Milk 50 g — 4 × ₹50 with 10% item discount = ₹180 (from the stock list)
4. Bill total ₹577 − bill discount ₹20 = **₹557**
5. Paid ₹300 cash + ₹257 UPI (split payment)

1. Choose the customer

1. Click the **Party** box (or press F3) and type part of the name or phone — **Priya**.
2. Pick **Priya Mehta**. Her phone fills in and loyalty points are tracked on this bill.

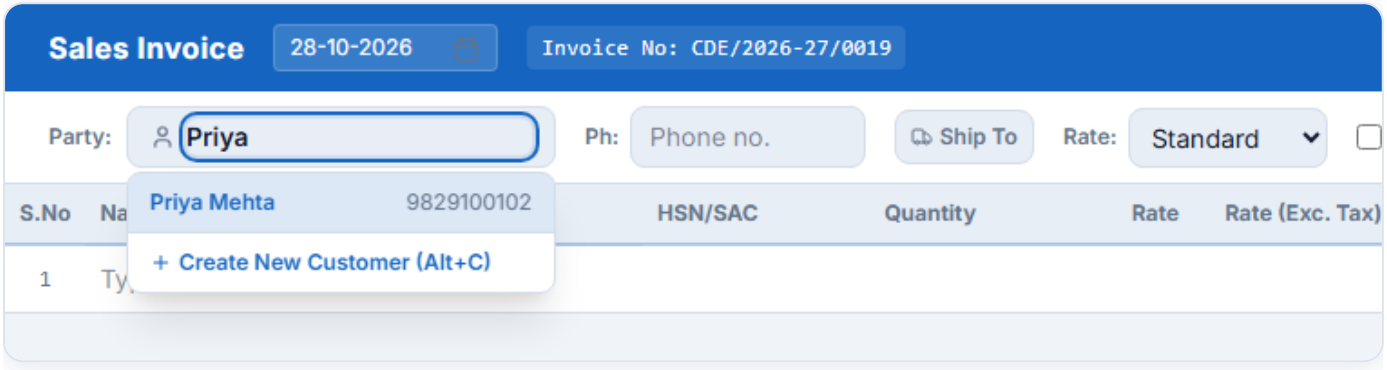

Figure Customer selected — phone filled automatically

2. Add items by name

1. Click the first item line and type **atta**.
2. The list shows matching items with SKU, stock and price. Press Enter to take the top match (or click it).
3. The cursor moves to **Quantity**. Type the quantity and press Enter — a new line opens.

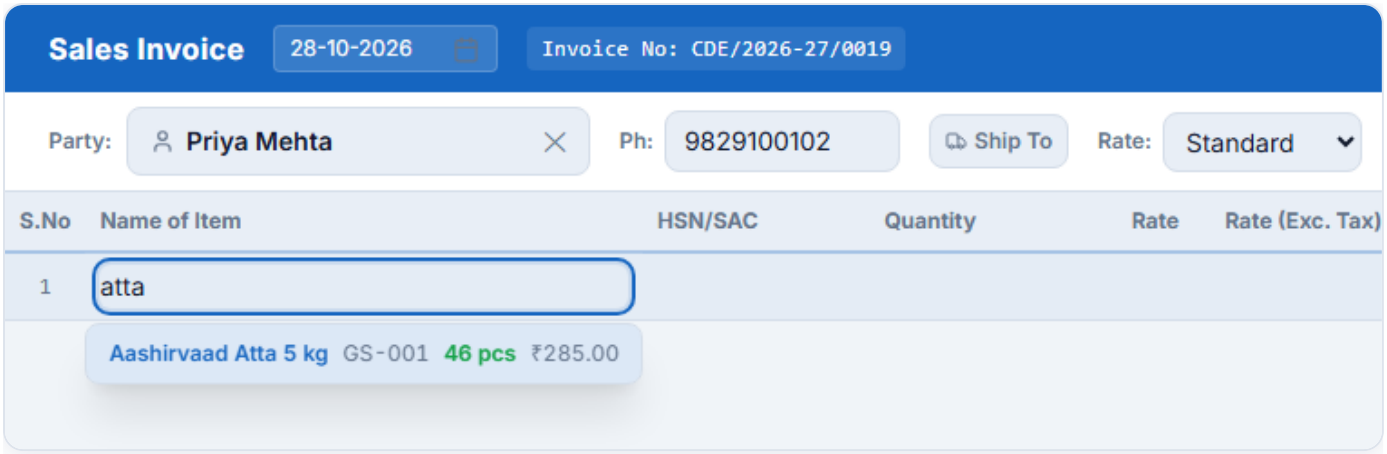

Figure Typing “atta” shows Aashirvaad Atta 5 kg — 46 pcs in stock, ₹285

3. Add an item by barcode

1. On the new line, scan the barcode (or type it): **8901058862317**.
2. Maggi 2-Minute Noodles is found. Press **Enter**, type quantity **2** and press **Enter**.

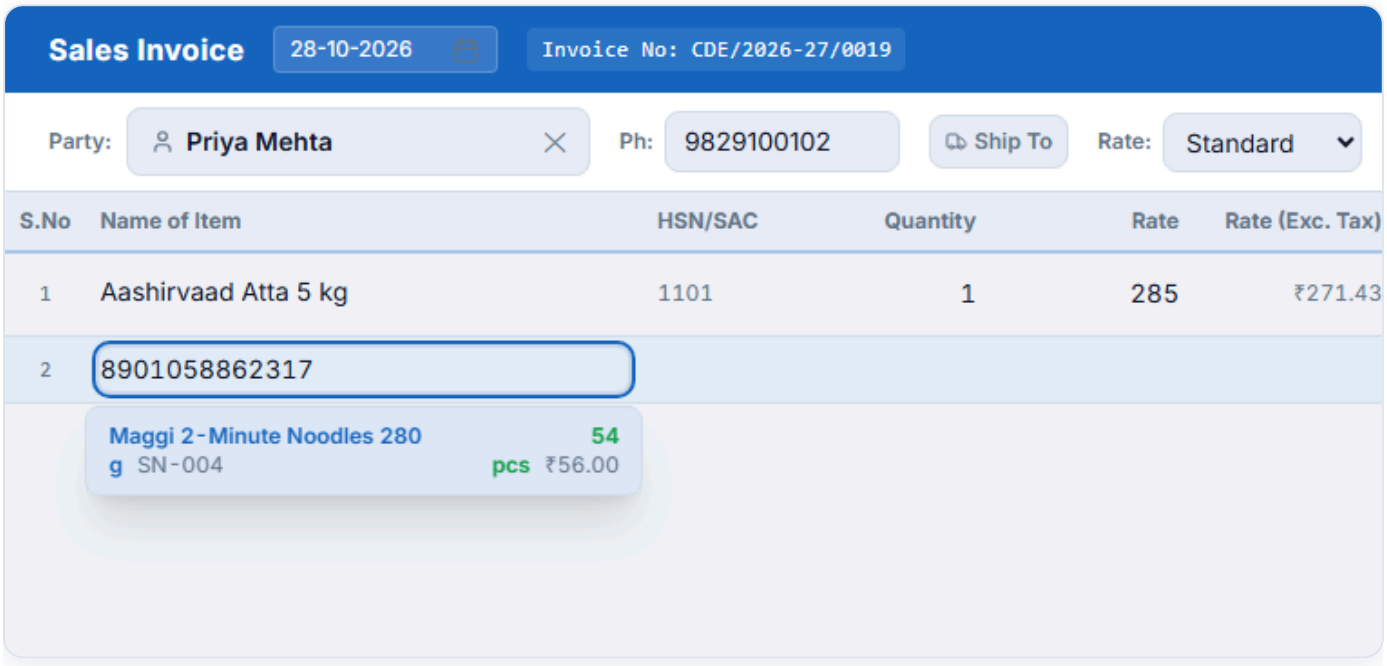

Figure A barcode typed in the item line finds the item

4. Add from the stock list, change quantity and discount

1. In **Stock Items** type **cadbury** and click **Cadbury Dairy Milk 50 g**.
2. Change its **Quantity** (4) to **4**.
3. Type **10** in **Disc %** (5). The line amount becomes ₹180.
4. The totals box (6) shows Subtotal (taxable value), GST and round-off.

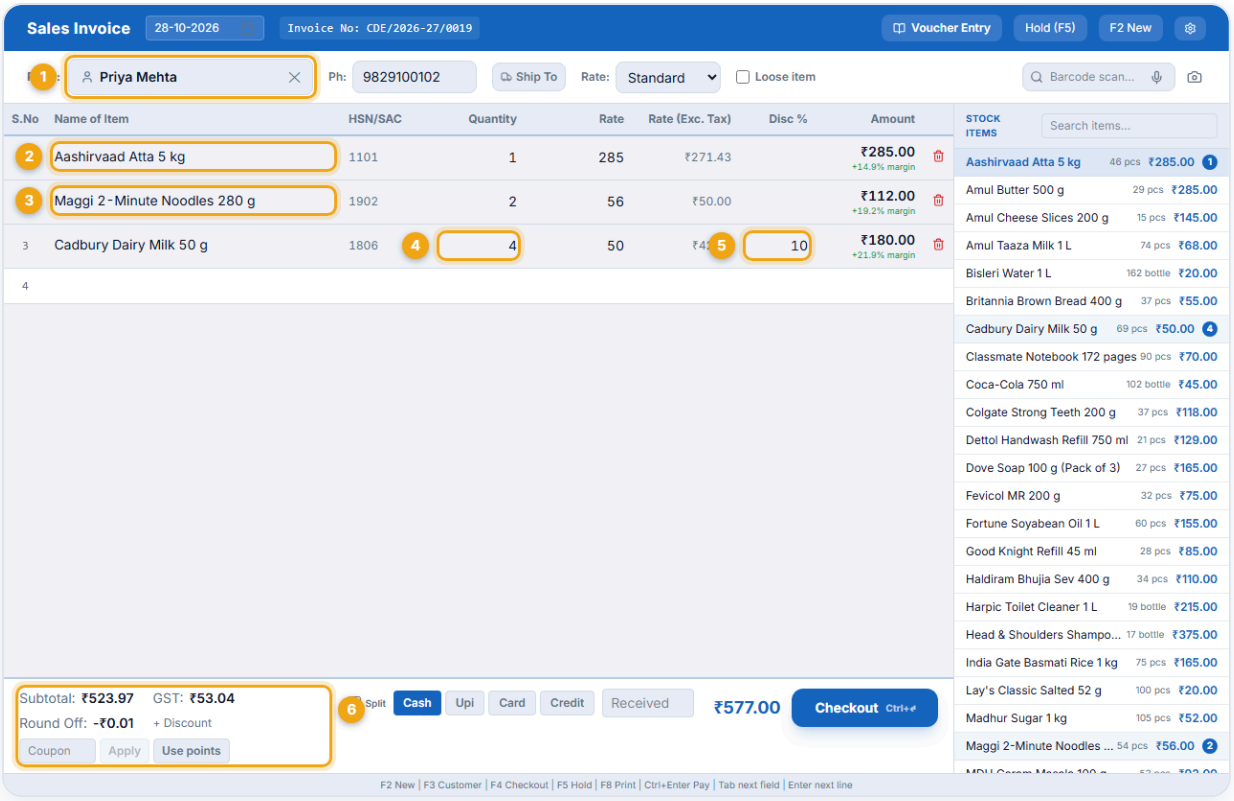

Figure Three lines — totals ₹577 with GST worked out per item

> **NOTE**
> Prices in the example include GST. The **Rate (Exc. Tax)** column shows the price without GST and the margin under each amount shows your profit on that line.

5. Bill discount

1. Click **+ Discount** under the totals.
2. Choose **₹** (or **%**) and type **20** (1).
3. The bill total drops to **₹557** (2). GST is reduced in proportion.

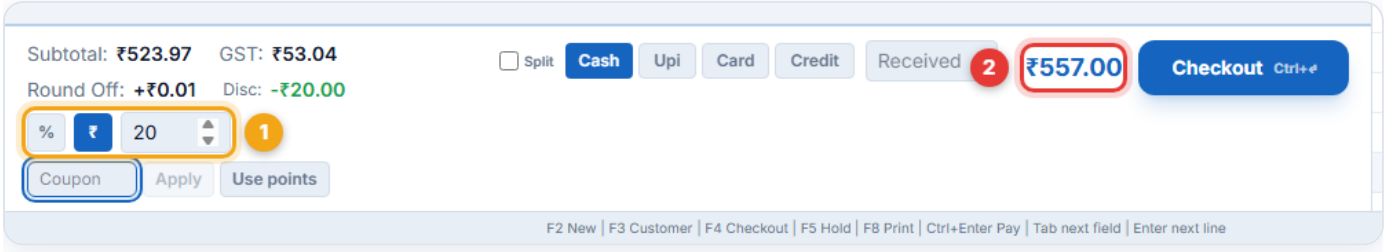

Figure Bill discount ₹20

> **TIP**
> Customers can redeem loyalty points with **Use points**, and a coupon code from **Offers & Portal** goes in the **Coupon** box.

6. Split payment and checkout

1. Tick **Split** (1). Boxes for Cash, UPI, Card and Credit appear with the remaining amount (“Rem”).
2. Type **300** in Cash (2) and **257** in UPI (3). Rem becomes ₹0.
3. Click **Checkout** (4) or press F4.



Figure Split ₹300 cash + ₹257 UPI

7. Print or share

The **Sale Complete** window shows the bill number and amount. Press 1 for a **POS Receipt** (thermal), 2 for an **A4 Invoice**, 3 for **WhatsApp**, 4 for direct **ESC/POS** printing, or Esc to skip. The POS is cleared for the next customer.

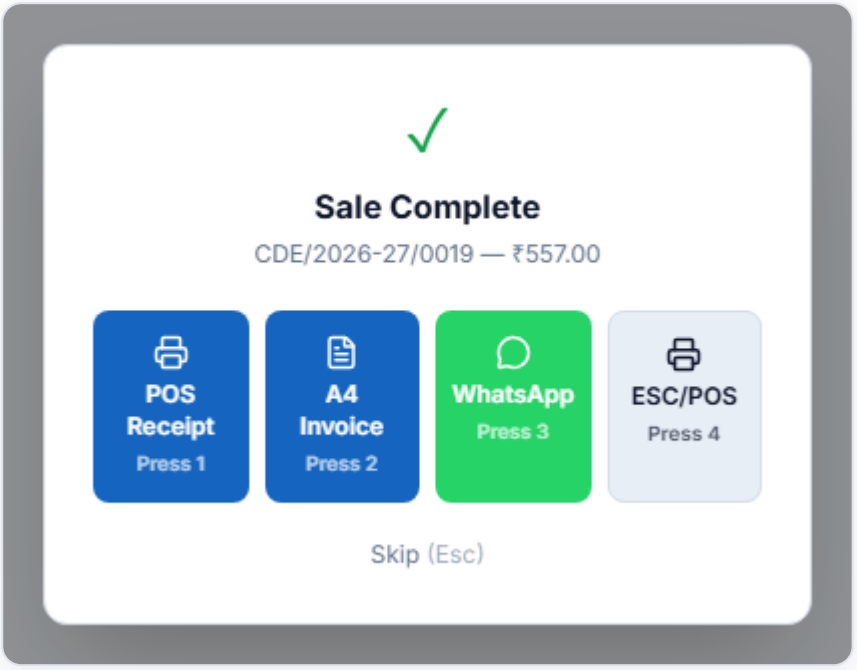

Figure Sale Complete — CDE/2026-27/0019, ₹557

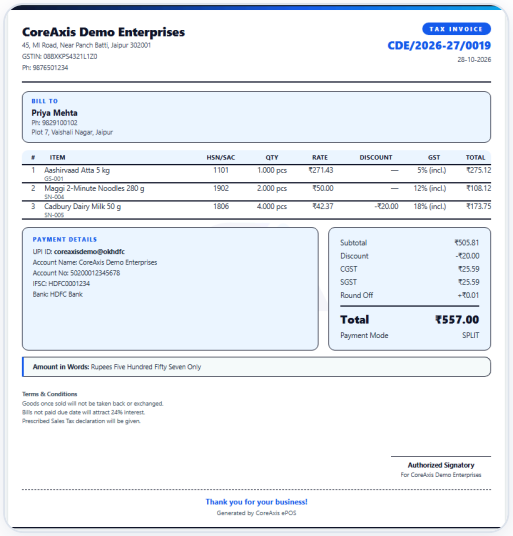

Figure A4 tax invoice with UPI and bank details

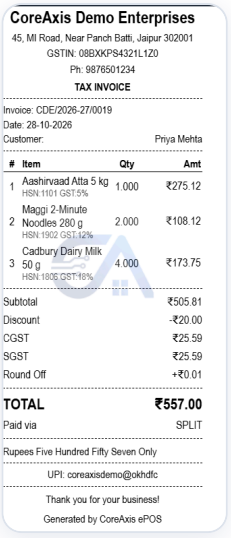

Figure 80 mm thermal receipt

Other ways to pay

Mode	How	What happens in the books
Cash	Click **Cash** (Alt + 1), type **Received** to see the change to return	Cash-in-hand goes up
UPI	Click **Upi** (Alt + 2); the bill prints your UPI QR	Bank / UPI account goes up
Card	Click **Card** (Alt + 3)	Bank account goes up
Credit (khata)	Select a customer first, then **Credit** (Alt + 4)	The customer's ledger shows the amount as due
Split	Tick **Split** and enter each part	Each part goes to its own account

WORKED EXAMPLE **Credit sale to a hotel**

1. Hotel Pink City Residency (GSTIN 08AAKFK1212E1ZS) bought 24 Bisleri, 12 Coca-Cola and 6 Parle-G for ₹1,620 on credit.
2. The bill is a B2B invoice; the ₹1,620 is added to the hotel's dues and later cleared with a receipt (Chapter 11).

WARNING
A credit sale above the customer's credit limit is stopped. The owner or an admin can approve an override, or you can collect part payment first.

Hold a bill, new customer and more

Hold (park) a bill

A customer forgot something? Press F5 or click **Hold (F5)**. The bill is parked and the POS is cleared for the next person. The top bar shows **1 Held**; click it to bring the bill back.

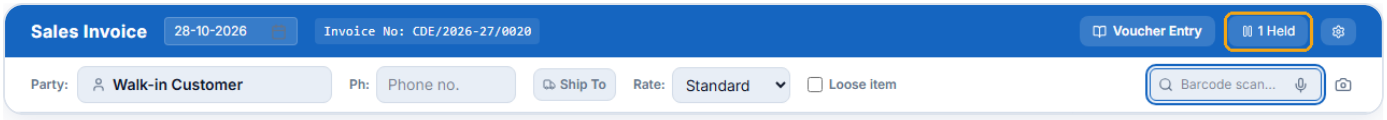

Figure "1 Held" — a parked bill waiting

Create a customer from the POS

Type a new name in the Party box and press **Alt** + **C**. The **Create Customer** window opens with the name filled; add the mobile, address, GSTIN, opening balance, credit limit and rate type, and click **Create Customer**.

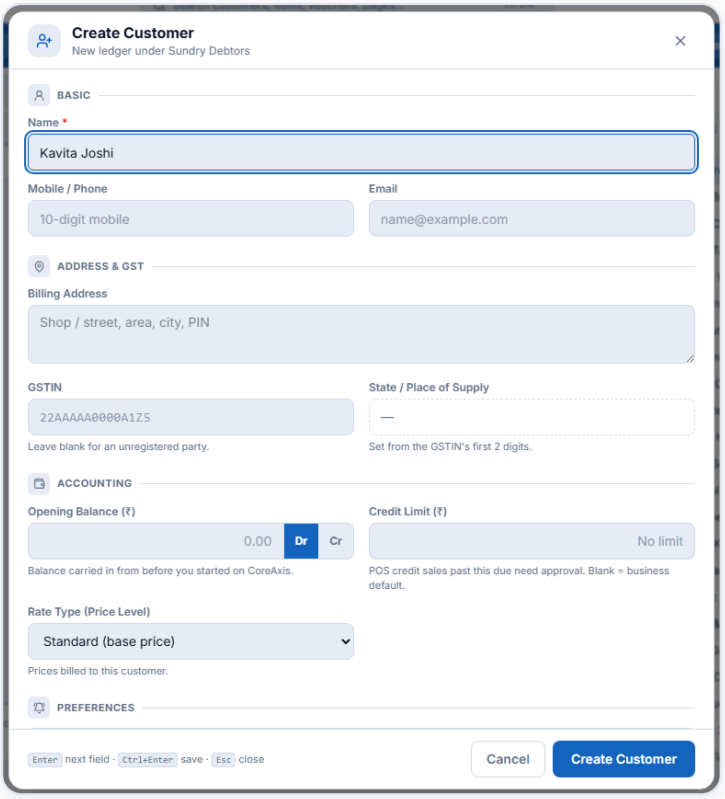

Figure Create Customer from the POS

Useful options on the POS bar

- **Ship To** — a delivery address different from the billing address.
- **Loose item** — sell by weight or a typed amount without a barcode.
- **Voucher Entry** — switch to the full keyboard voucher screen (Chapter 11).
- **Settings (gear)** — choose which columns the bill grid shows: HSN, rate with / without tax, discount, GST %, unit, batch, expiry, barcode, narration.
- **F8** reprints the last receipt; **F2** starts a new bill.

F2 New bill | **F3** Customer | **F4** Checkout | **F5** Hold | **F8** Reprint | **Alt+1…4** Pay mode

Alt+C New customer | **Del** Remove line

CHAPTER 7

07 Sales, Returns and Sales Documents

After billing, everything about a sale lives in Sales: find a bill, reprint or share it, take back items, cancel, and prepare quotations, delivery challans, credit / debit notes and recurring bills.

Jaldi samjhein (Hinglish quick start)

Purane bill **Sales** mein milenge — invoice number ya customer naam se search kijiye. Bill kholkar print, WhatsApp, return ya cancel. Quotation, delivery challan aur credit note bhi isi chapter mein.

Sales history

1. Open **Sales** from the sidebar (or `g` `s`).
2. Pick the period (1): **Today**, **Week**, **Month**, an FY range or your own dates.
3. Search by invoice number or customer name (2).
4. Use **Export** (3) for Excel / PDF.
5. Click a bill (4) — or use `↑` `↓` and `Enter` — to open it.

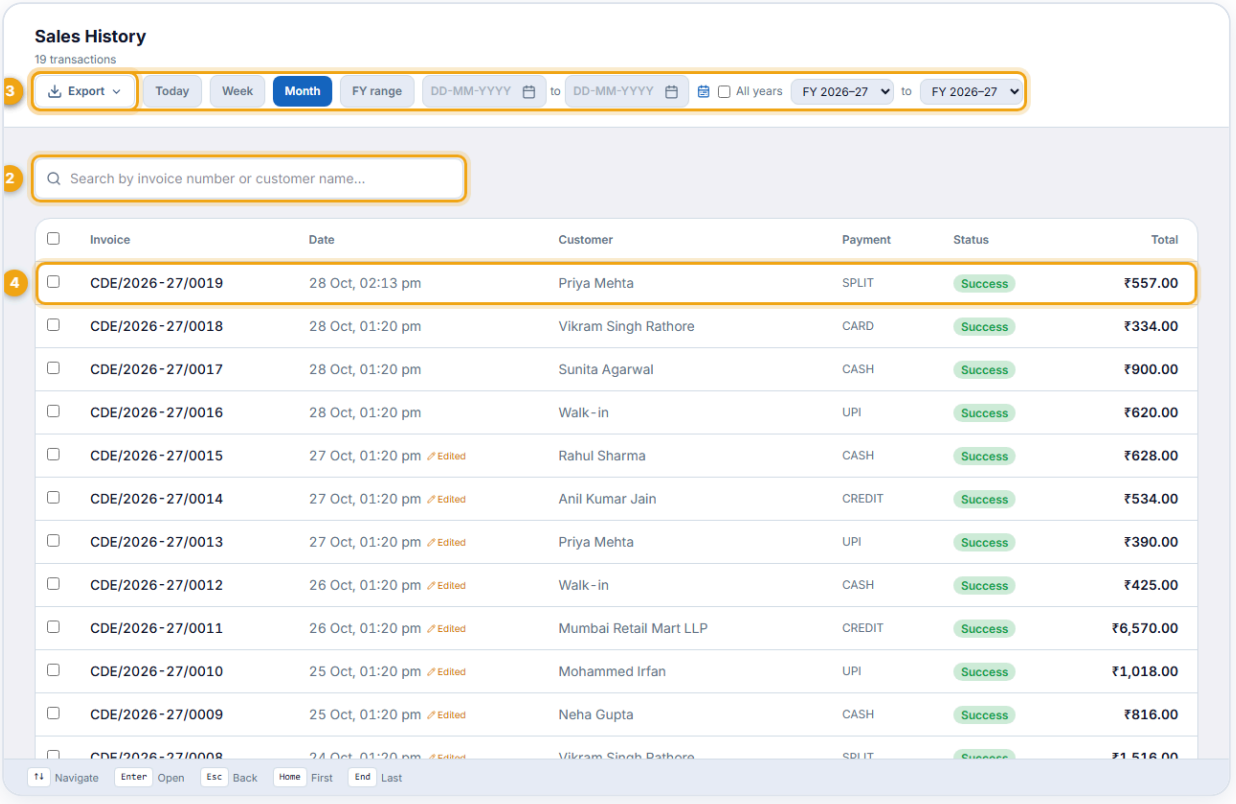

Figure Sales History — this month, 19 bills

> **NOTE**
> An **Edited** tag means the bill was changed after saving; the Edit Log keeps the original.

Open a bill: print, share, edit

The bill page shows the customer, items with HSN and GST split, taxable amount, CGST / SGST, discount and grand total.

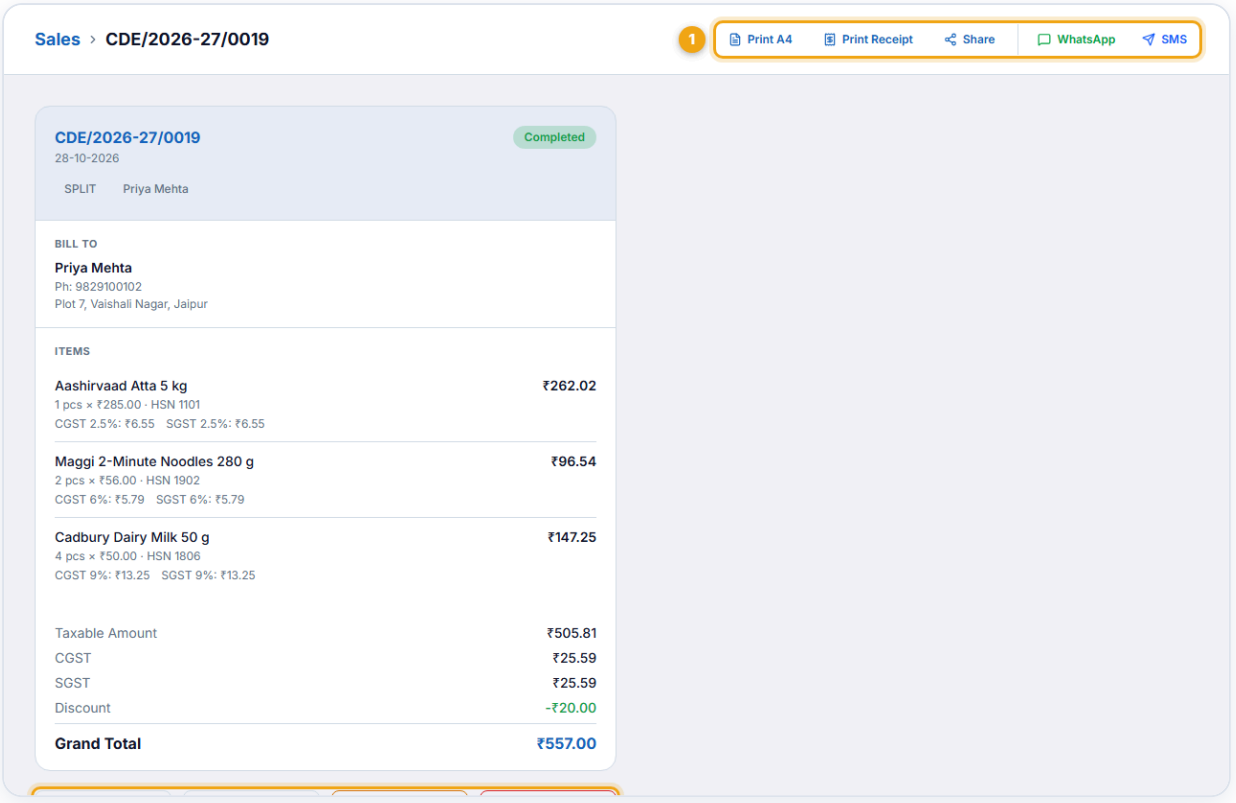

Figure Bill CDE/2026-27/0019

- **Print A4** / **Print Receipt** (1) — reprint in either format.
- **Share**, **WhatsApp**, **SMS** — send the bill to the customer.
- **Edit Sale**, **Return Items**, **Cancel Sale**, **Delete Sale** (2) — shown only to roles that may use them.

Sales return

1. Open the bill and click **Return Items**.
2. For each item, type the quantity coming back. The window shows how many were sold and how many can still be returned.
3. Add a reason (optional) and click **Confirm Return**.
4. Stock goes back up, a credit note is created and the refund or adjustment is posted.

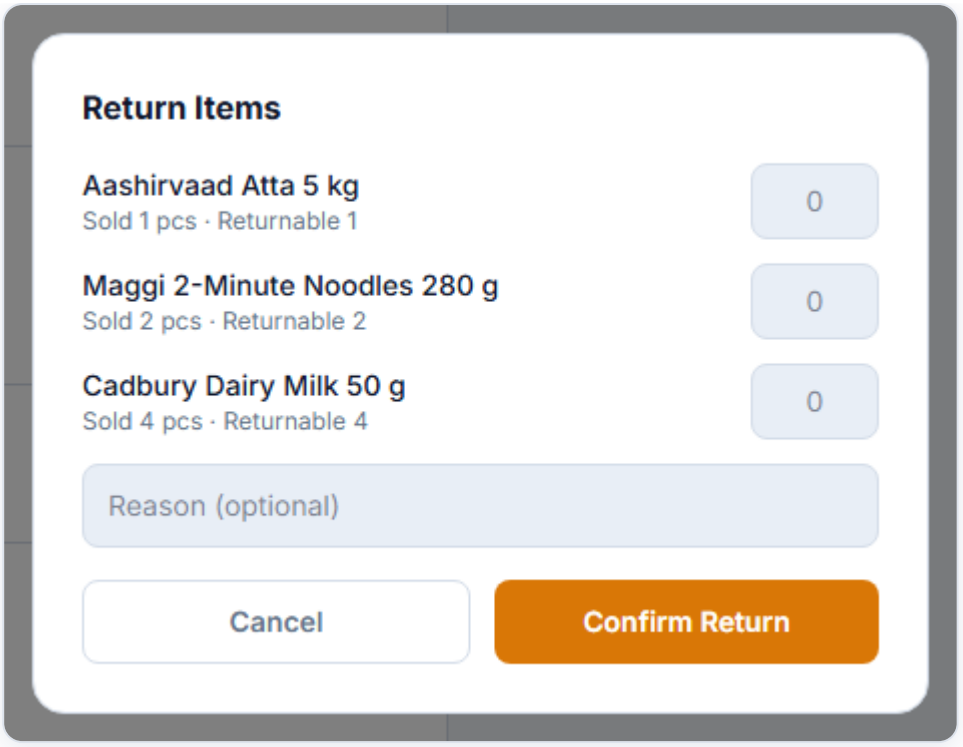

Figure Return Items

WORKED EXAMPLE **Return of a torn pack**

1. Sunita Agarwal returned 1 Surf Excel Easy Wash 1 kg from bill CDE/2026-27/0004 (paid by card).
2. Credit note **CN-00001** for ₹145 was created; stock of Surf Excel went up by 1.

NOTE
Returns are allowed within the return window (30 days by default). Items marked “no return” on the product cannot be returned.

Cancel a sale

Use **Cancel Sale** when the whole bill was a mistake. You are asked to confirm; the bill keeps its number with status Cancelled, stock comes back and the accounts are reversed.

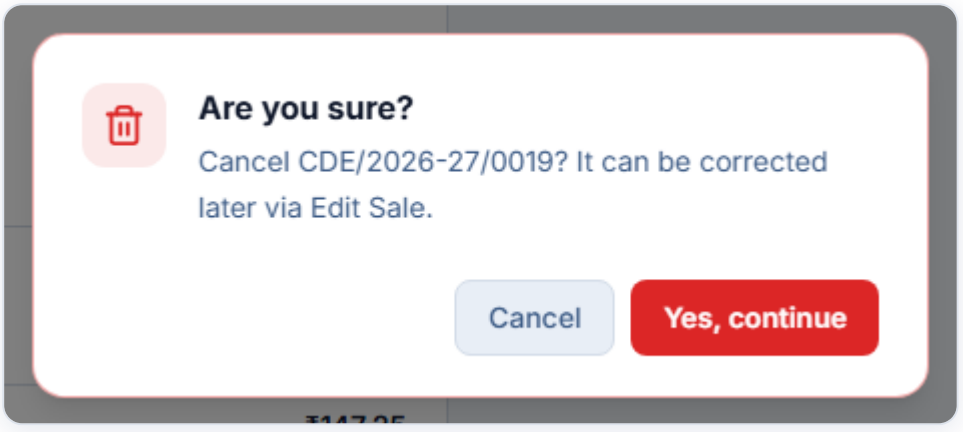

Figure Confirm before cancelling

> **WARNING**
> Cancel only bills that never reached the customer, or that the customer fully returned. For a partial return use **Return Items**.

Quotations

A quotation gives a customer your prices before they buy. When they agree, convert it to a bill in one click.

1. Open **Quotations** and click **New Quote** (1).
2. Choose the customer and a **Valid Until** date.
3. Add items (pick a product, quantity, price and GST) with **+ Add Line**. Totals update as you type.
4. Add notes and click **Create Quote**.
5. Track status in the list (2): Draft → Sent → Accepted / Rejected → Converted. Use the WhatsApp and print icons to send it.

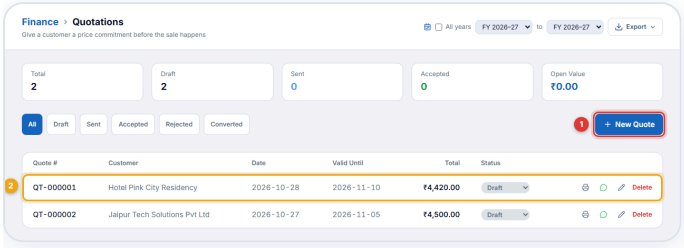

Figure Quotations — QT-000001 for Hotel Pink City Residency, ₹4,420

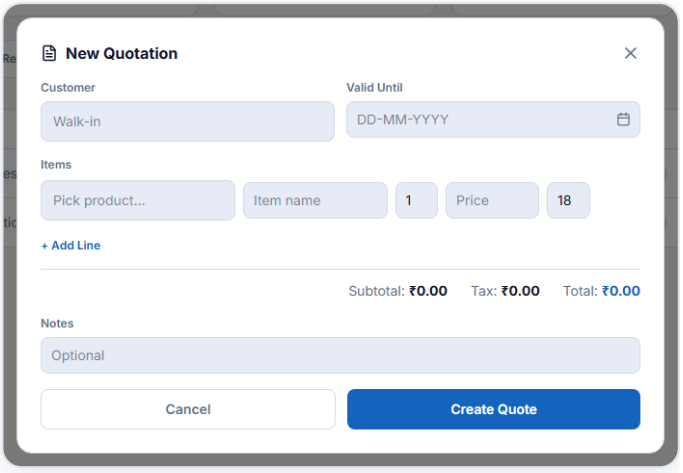

Figure New Quotation

> **WORKED EXAMPLE** **Minibar supply quote**
>
> 1. Customer: Hotel Pink City Residency · valid till 10-11-2026
> 2. 48 Bisleri 1 L, 24 Coca-Cola 750 ml, 12 Parle-G 800 g, 4 Tata Tea Premium — total ₹4,420
> 3. When the hotel confirms, open the quote and convert it into a sale.

Delivery challans

A delivery challan goes with goods that are not a sale yet — on approval, job work or stock transfer. It is not a tax invoice.

1. Open **Delivery Challans** and click **New Challan**.

2. Choose the customer / party, date and **Challan Type** (Job Work, Stock Transfer, On Approval / Sale-or-Return, Other).
3. Add items with HSN, quantity and rate, and the vehicle number and transporter if any.
4. Click **Create Challan**. Print it to send with the goods.

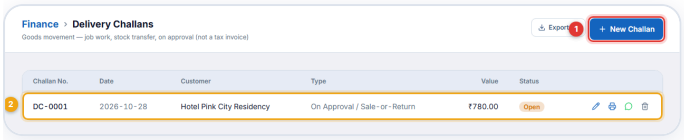

Figure DC-0001 — 6 juice packs to the hotel on approval

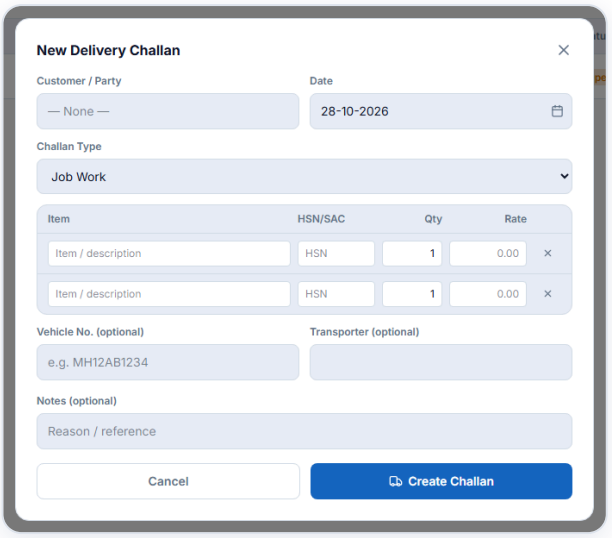

Figure New Delivery Challan

Credit and debit notes

Credit/Debit Notes is the full register of sales returns, purchase returns and standalone notes.

- **Credit note (CN)** — you owe the party: a return, a rate difference or a discount after the sale.
- **Debit note (DN)** — the party owes you: for example a rate increase or goods returned to a supplier.

1. Click **New Note** and choose Credit Note or Debit Note.
2. Enter the party name and GSTIN, the invoice it relates to, the date and the **Reason**.
3. Add particulars with HSN, quantity, rate and GST %.
4. Save. The note is reported in GSTR-1 (CDNR / CDNUR).

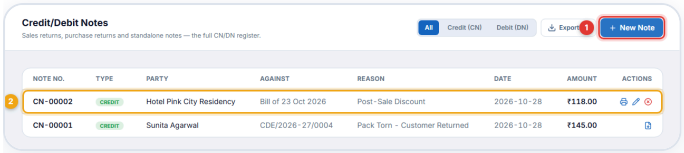

Figure CN-00002 (discount) and CN-00001 (return)

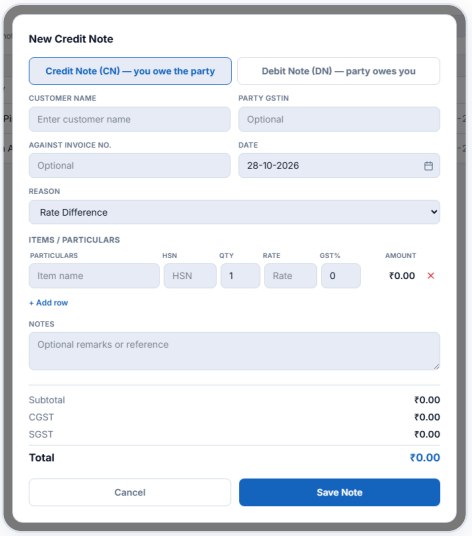

Figure New Credit Note

WORKED EXAMPLE **Post-sale discount**

1. Hotel Pink City Residency was given ₹100 + 18% GST off after the 23 Oct bill → **CN-00002** for ₹118.

Sales invoices (accounts view) and recurring billing

Finance → Sales Invoices shows credit and B2B bills with total, received, balance and status (Pending, Partial, Paid, Overdue). Click **Receive** to record a payment against a bill.

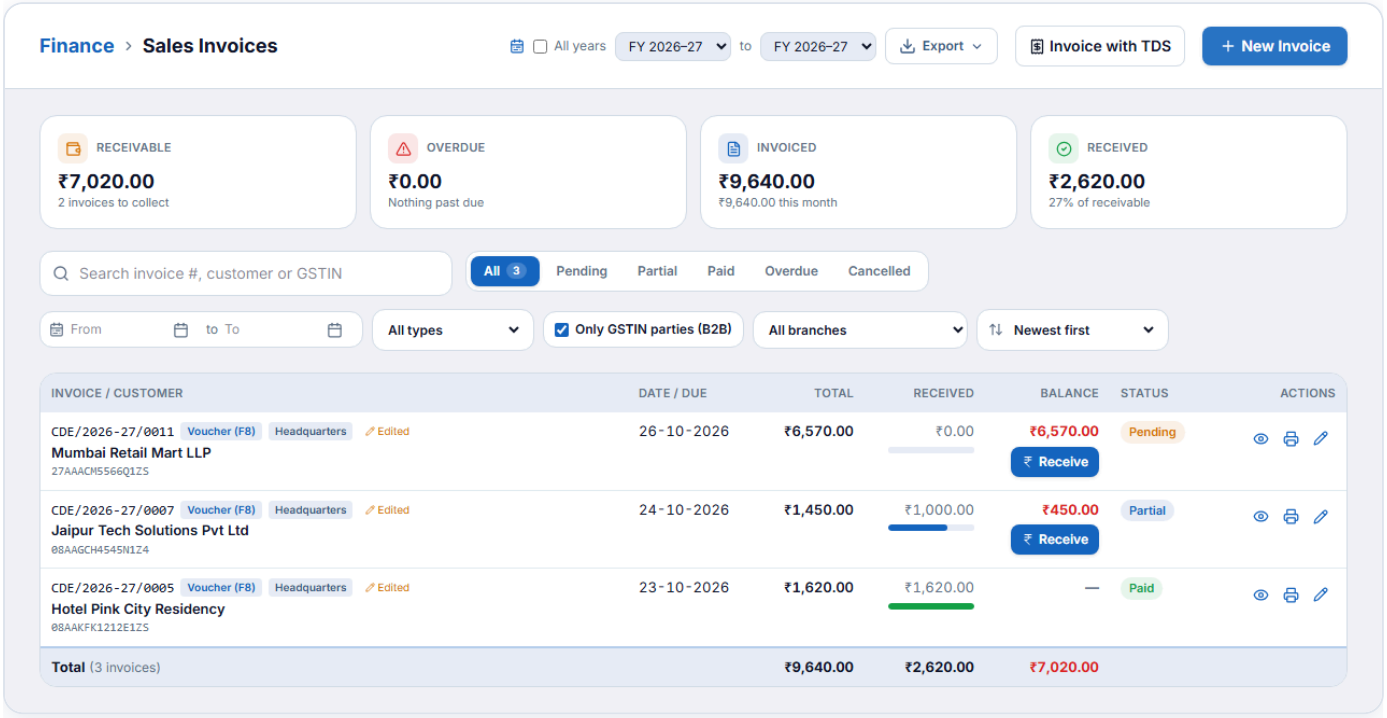

Figure Sales Invoices — ₹7,020 still to collect

Recurring Billing bills a customer automatically on a schedule — memberships, rent, AMC. Click **New Plan**, choose the customer, plan name, amount, GST %, frequency and first billing date.

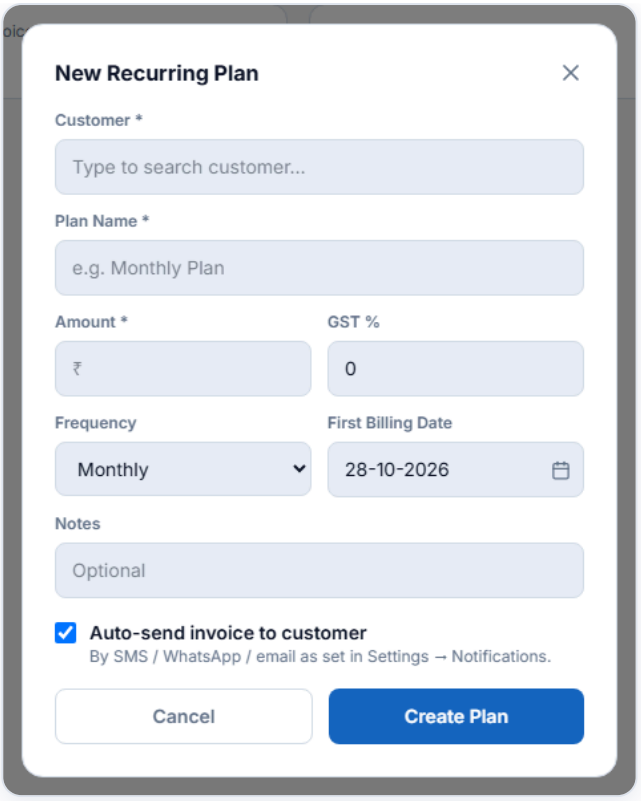

Figure New Recurring Plan

CHAPTER 8

08 Inventory: Items and Stock

Create your items with the right HSN and GST, keep stock correct in every branch and godown, count stock, move it between branches, write off damaged goods and print barcode labels.

Jaldi samjhein (Hinglish quick start)

Item banane ke liye **Inventory** → **Add Product**: naam, SKU, barcode, selling price, MRP, cost, HSN, GST rate, opening stock, unit aur category. Stock check, transfer, write-off aur barcode label bhi Inventory mein.

The Inventory page

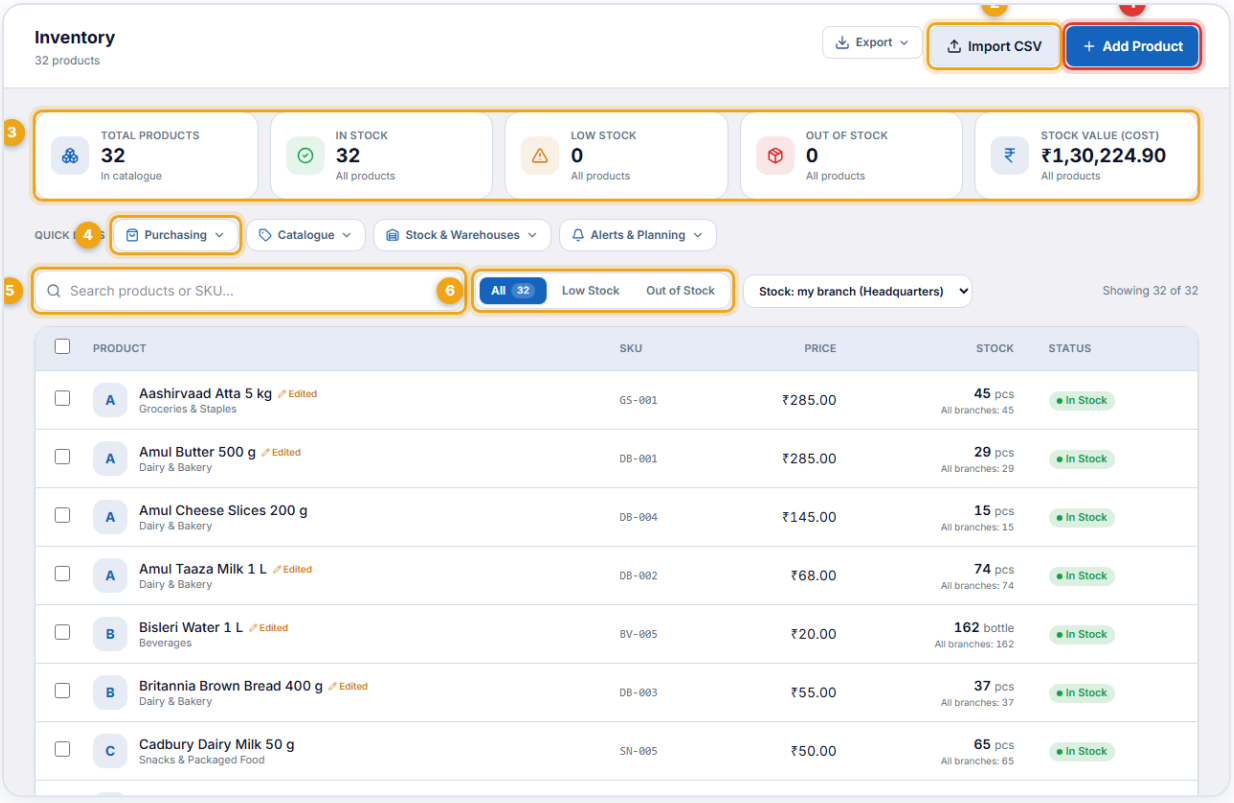

Figure Inventory — 32 items, stock value ₹1,30,224.90 at cost

1. **Add Product (1)** and **Import CSV (2)** — add one item or many.
2. **Summary tiles (3)** — total products, in stock, low stock, out of stock and stock value.
3. **Quick links (4)** — Purchasing, Catalogue (categories, brands, barcode labels), Stock & Warehouses and Alerts & Planning.
4. **Search (5)** by name or SKU.
5. **Filters (6)** — All, Low Stock, Out of Stock; and which branch's stock to show.

Categories

Open **Inventory** → **Catalogue** → **Categories**. Create categories under **Product** — only items in Product and its sub-categories show at the POS. The example uses Groceries & Staples, Beverages, Snacks & Packaged Food, Personal Care, Household & Cleaning, Dairy & Bakery and Stationery.

> ★ **TIP**
> Keep raw materials, packing material and things you do not sell in a separate top-level category so they stay off the billing screen.

Add a product

WORKED EXAMPLE **New item: Haldiram Aloo Bhujia 1 kg**

1. SKU SN-006 · barcode 8904063200046
2. Selling price ₹240 (incl. GST) · MRP ₹240 · cost ₹200
3. HSN 2106 · GST 5% · opening stock 24 pcs · reorder level 6
4. Category Snacks & Packaged Food · supplier Shree Balaji Traders

1. Click **Inventory** → **Add Product**.
2. **Basic information**: **Product Name** (1), an optional description and photo, a unique **SKU** (2) and the **Barcode** (3) — scan it into the box.
3. **Pricing**: **Selling Price** (4), **MRP** (5) and **Cost Price** (6). An optional discount and the rate for each price level (e.g. Wholesale) can be set here.

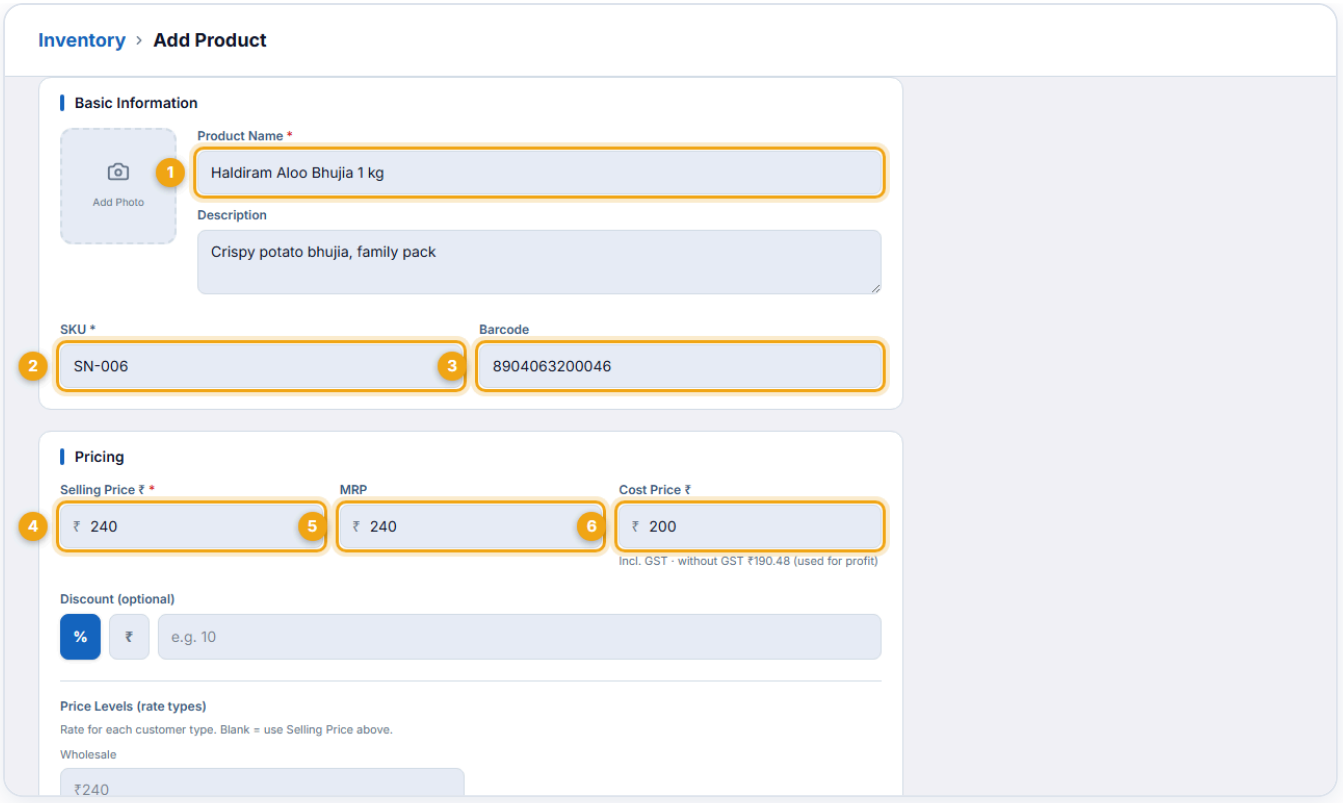

Figure Basic information and pricing

1. **GST & Tax**: type the **HSN / SAC Code** (1) or search it by product name, choose the GST category and the **GST Rate** (2).

2. Keep **Price includes GST** (3) ticked if the selling price is the final price the customer pays.

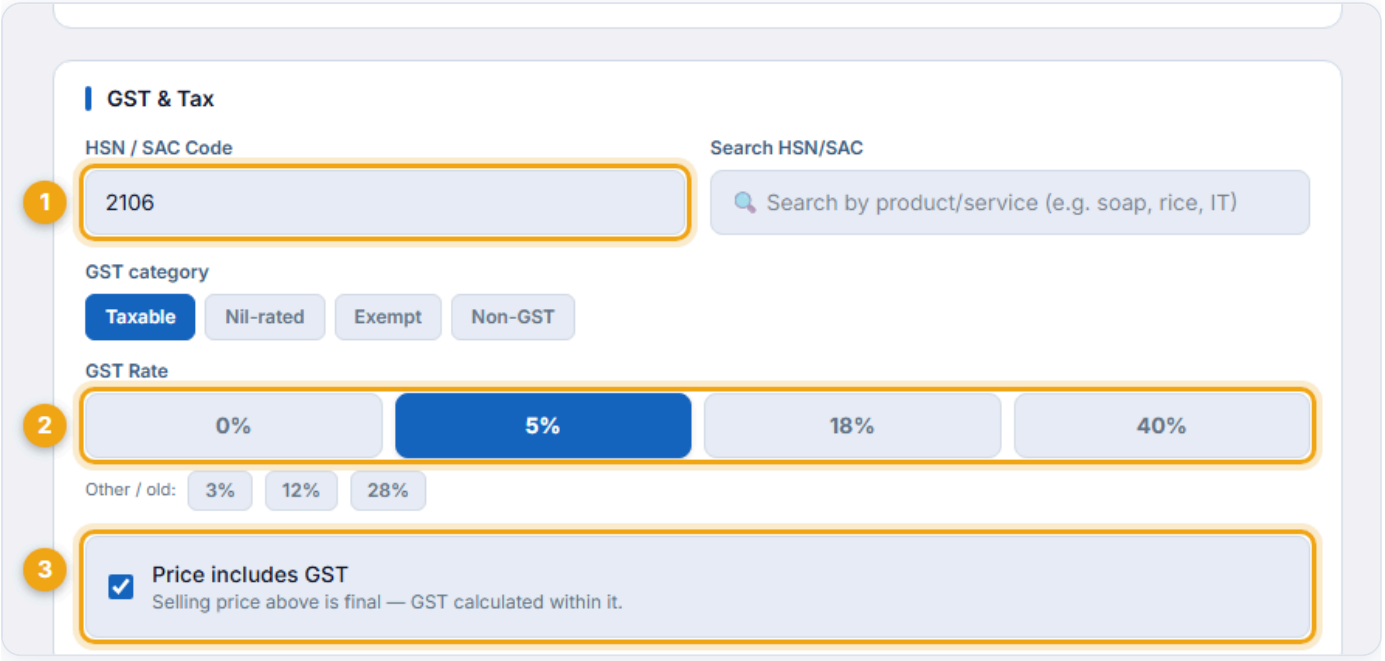

Figure HSN 2106, GST 5%, price includes GST

1. **Stock**: **Opening Stock** and **Reorder Level** (1). Tick **Track Batches (FEFO)** for items with batch / expiry.

2. Choose the selling **Unit** (2) and, if you buy in a bigger unit, an **Alternate Unit (Purchase)** such as box or carton.

3. **Category & Supplier**: pick the **Category** (3) and the usual **Supplier** (4).

4. Click **Save Product**. The item is ready to bill and its opening stock is booked at cost.

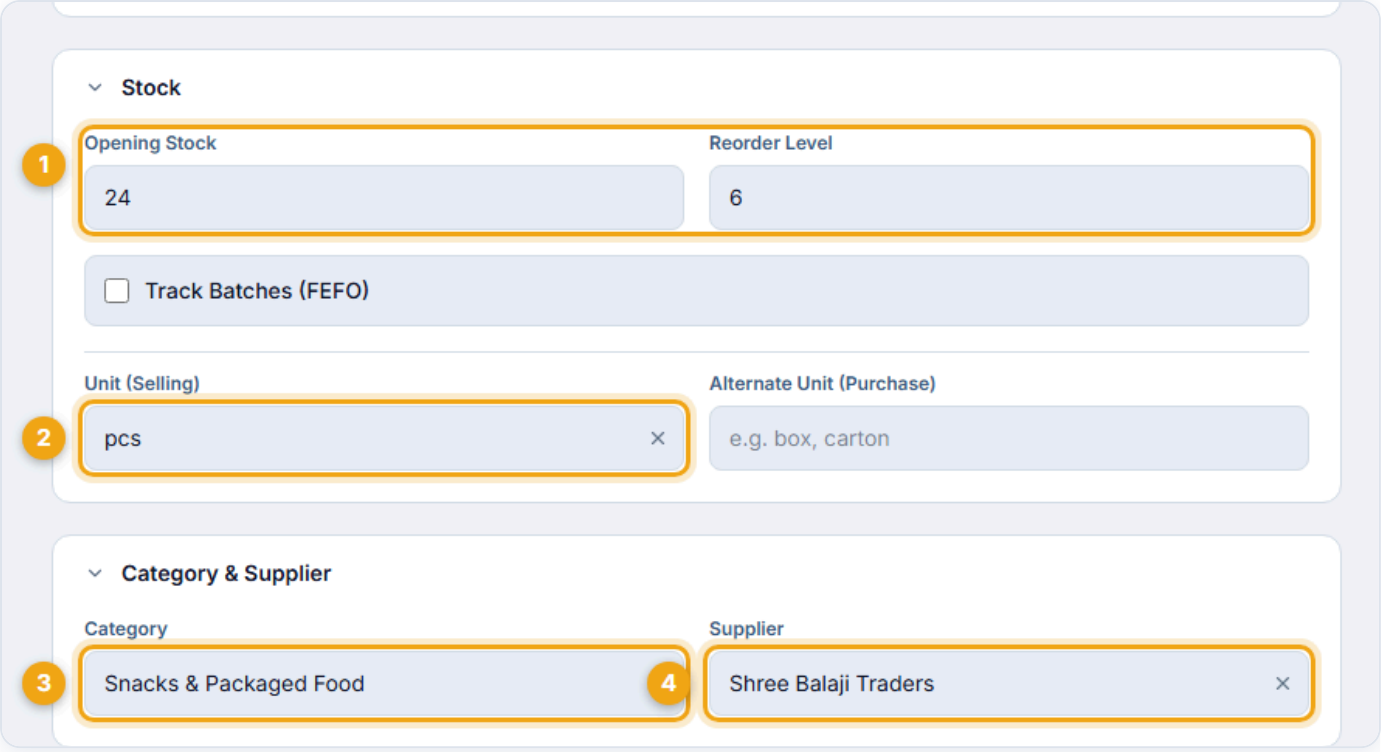

Figure Opening stock 24, reorder 6, unit pcs, category and supplier

NOTE
GST rates allowed are 0, 0.1, 0.25, 1.5, 3, 5, 12, 18, 28 and 40%. Since GST 2.0 most items fall in 5% or 18%; the older 12% and 28% rates remain under “Other / old”.

WARNING
The first two digits of the HSN must match the item. The GST rates and HSN codes in this manual are examples — confirm them with your tax adviser.

Product details and stock adjustment

Click any item in the list to open its page: stock, reorder level, selling price, margin, stock value, pricing details and **Recent stock movements** — every sale, purchase and adjustment that changed the stock.

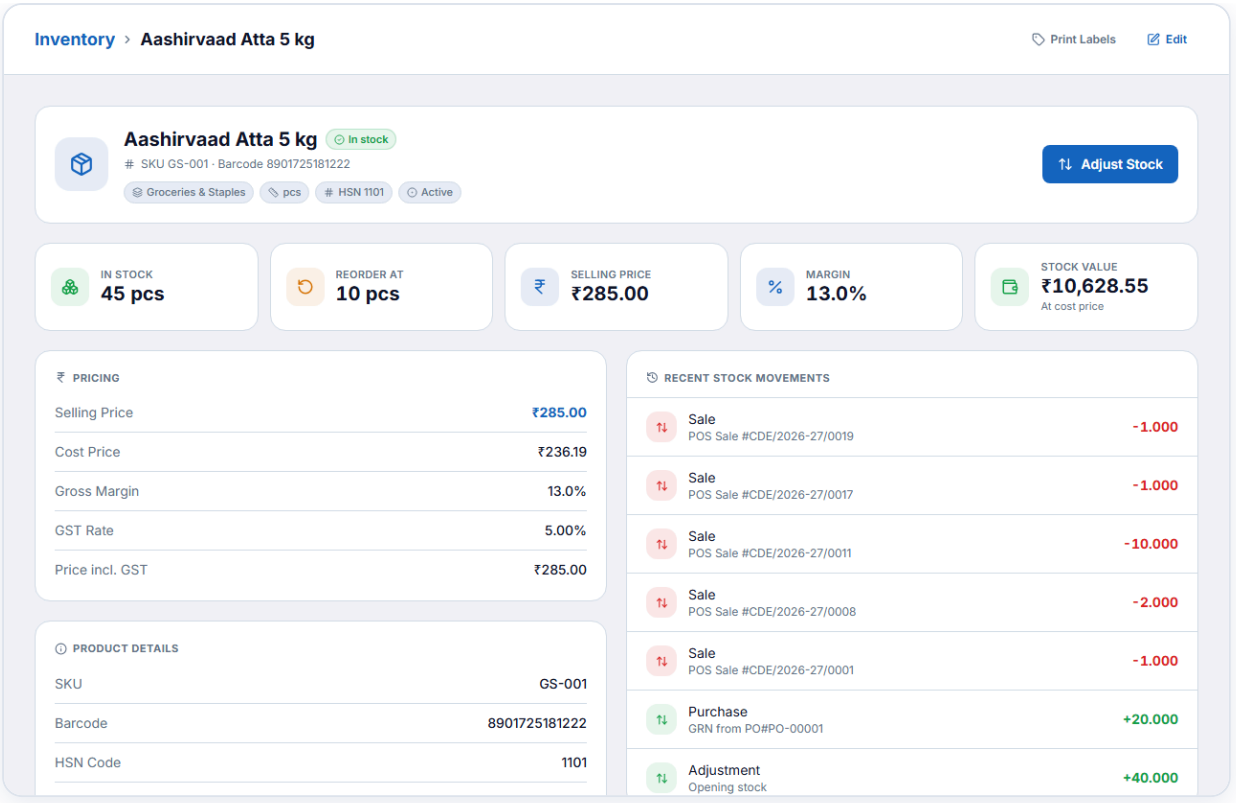

Figure Aashirvaad Atta 5 kg — 45 pcs, 13% margin, movements

1. Click **Adjust Stock** to correct the quantity after a count or breakage, with a reason.
2. **Edit** changes the item; **Print Labels** prints barcode labels for it.

Stock audit (physical count)

1. Open **Stock Audit** and click **New Audit**.
2. Choose the audit date and add a note.
3. Search and add the products to count (or count everything), then **Create**.
4. Enter the counted quantity for each item. The audit shows the difference against the system.
5. Finish the audit to post the differences as stock adjustments.

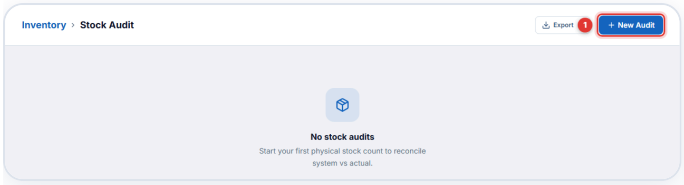

Figure Stock Audit

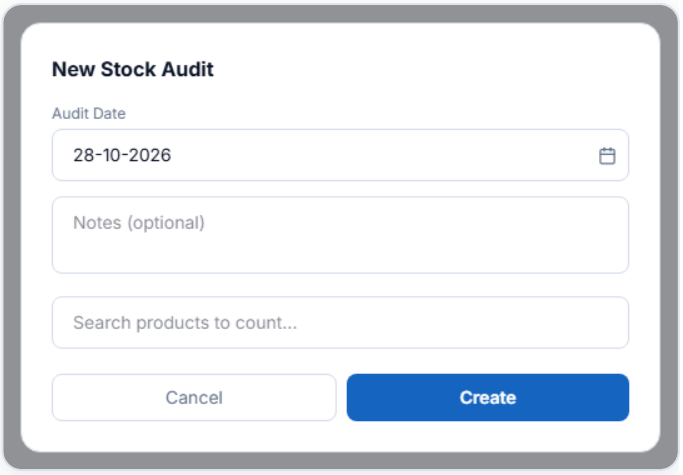

Figure New Stock Audit

Stock transfers, branch transfers and godowns

Stock Transfers move stock between branches: dispatch takes it out of the sending branch (in transit) and receiving adds it at the destination.

1. Click **New Transfer**.
2. Choose **From branch** and **To branch** and the date.
3. Search and add the products with quantities, and any freight or loading cost.
4. Click **Save & Dispatch** (or **Save Draft**). The receiving branch confirms when the goods arrive.

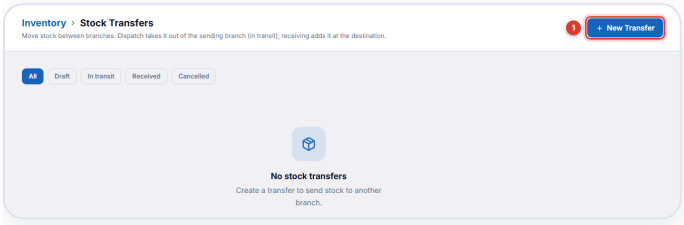

Figure Stock Transfers

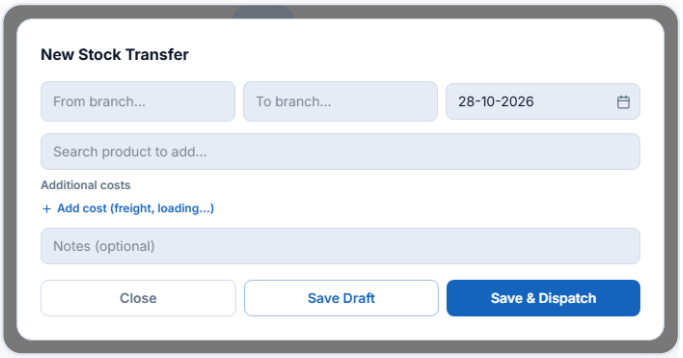

Figure New Stock Transfer

Branch Transfers also move assets, cash and staff between branches. **Godowns** track where stock physically sits inside a branch (store room, warehouse, shelf) — total stock stays one figure; godown moves only change the location.

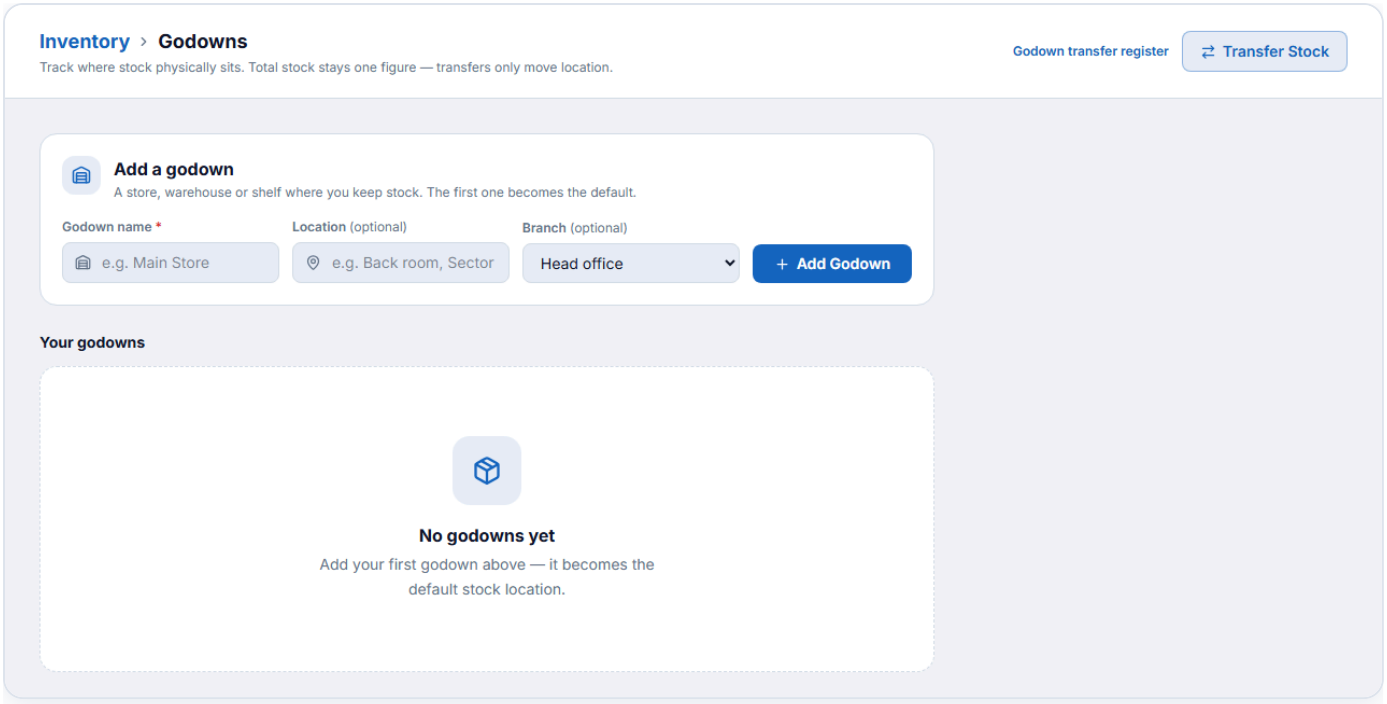

Figure Godowns

Write-offs

Record expired, damaged, lost or obsolete stock in **Write-Offs**. Stock is reduced and the loss is posted to accounts automatically.

1. Click **New Write-Off**.
2. Pick the date and the reason (Expired, Damaged, Lost, Obsolete, Quality defect).
3. Add the products and quantities and click **Submit Write-Off**.

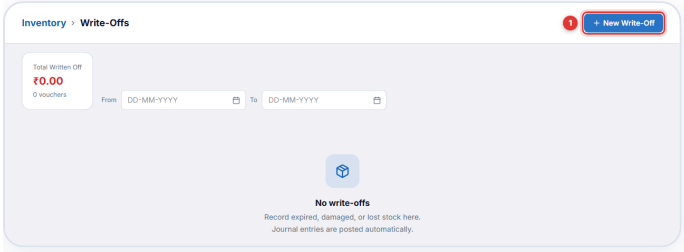

Figure Write-Offs

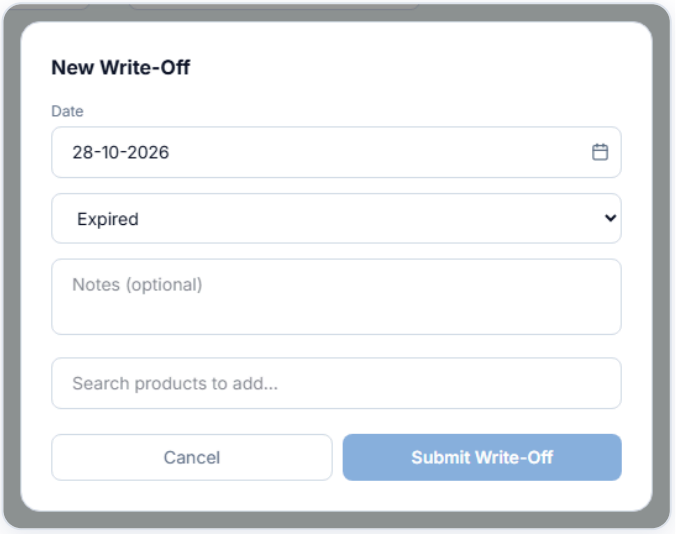

Figure New Write-Off

Barcode labels and stock alerts

1. Open **Inventory → Catalogue → Barcode Labels**.
2. Tick the products (1) and type how many labels each needs (2).
3. Print the label sheet on your label printer or A4 label paper.

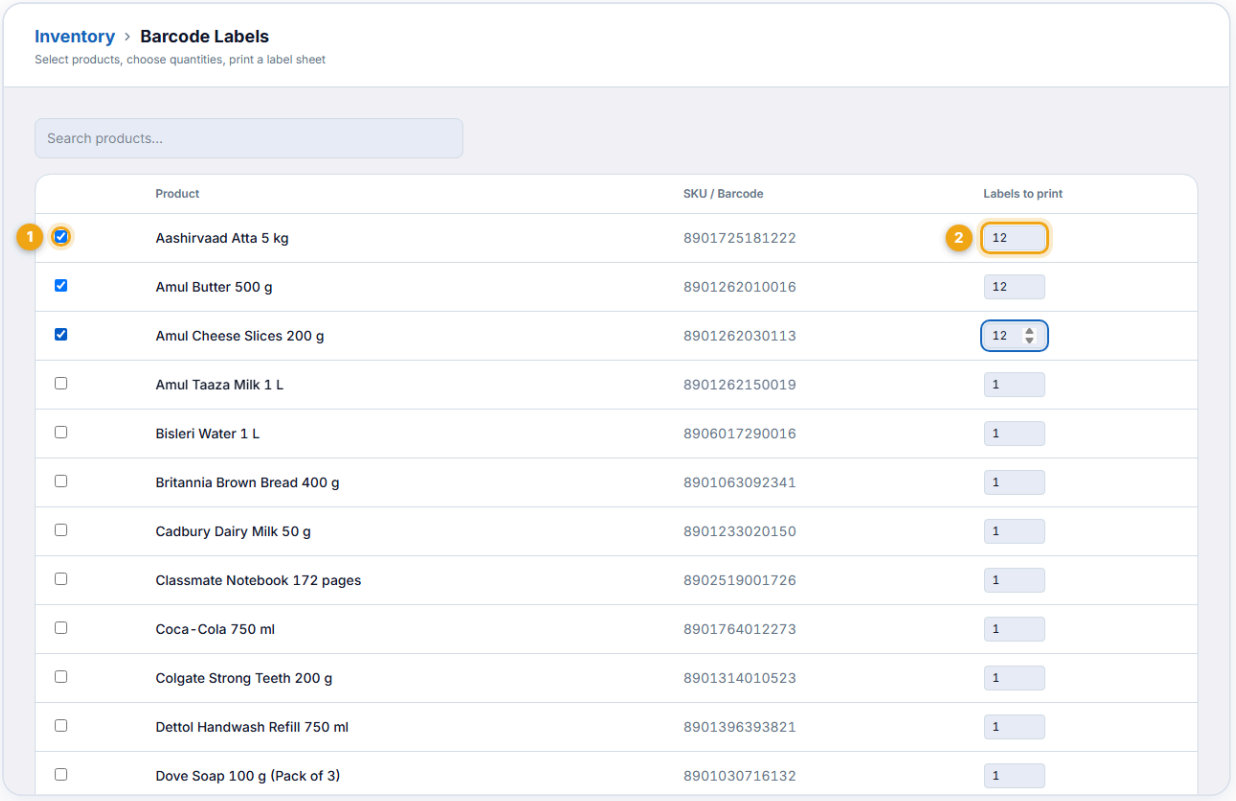

Figure Barcode Labels — 12 labels each for three items

Inventory Alerts lists low-stock, expiring, out-of-stock and overstock items, and can send them to you on WhatsApp / SMS (**Send Alerts Now**).

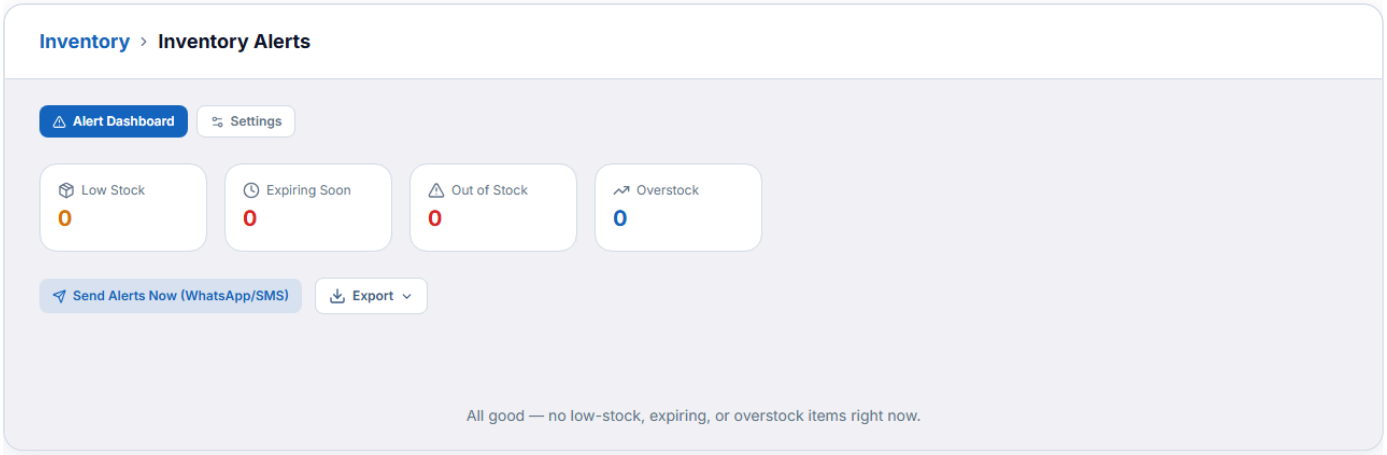

Figure Inventory Alerts — all good

CHAPTER 9

09 Purchases and Suppliers

Keep a ledger for every supplier, place purchase orders, record supplier bills with the right GST so you can claim input tax credit, receive goods, return goods and see what you owe.

Jaldi samjhein (Hinglish quick start)

Supplier **Inventory** → **Suppliers** mein banaiye (GSTIN ke saath). Supplier ka bill **Purchase (F9)** se entry kijiye — GST aur stock dono update hote hain. Order dena ho to **Purchase Orders** → **New PO**, maal aane par **Mark Fully Received**.

Suppliers

1. Open **Suppliers** (sidebar) and click **Add Supplier** (1).
2. Enter the name, mobile and email.
3. Enter the **GSTIN** — the state fills in from its first two digits — and the PAN (needed for TDS).
4. Enter an **Opening Balance** if you already owe them money (or they owe you) on the day you start.
5. Save. A ledger under Sundry Creditors is created for the supplier.

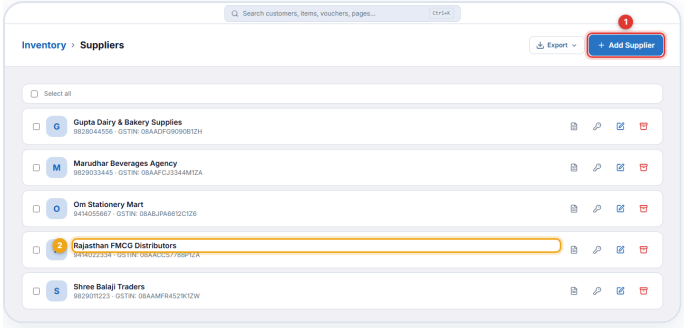

Figure Five suppliers with GSTIN

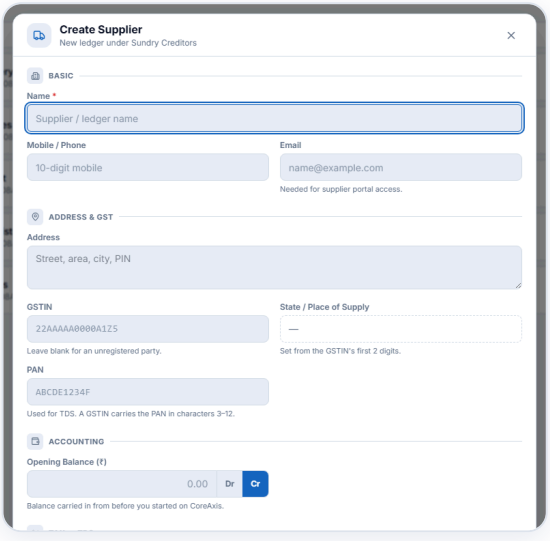

Figure Create Supplier

Supplier	GSTIN	Opening balance (we owe)
Rajasthan FMCG Distributors	08AACCS7788P1ZA	₹42,000
Shree Balaji Traders	08AAMFR4521K1ZW	₹18,500
Gupta Dairy & Bakery Supplies	08AADFG9090B1ZH	₹6,500

Supplier	GSTIN	Opening balance (we owe)
Marudhar Beverages Agency	08AAFCJ3344M1ZA	—
Om Stationery Mart	08ABJPA6612C1Z6	—

Record a supplier bill — Purchase voucher (F9)

When goods arrive with the supplier's tax invoice, enter it as a purchase. This adds stock, books the GST as input tax credit and adds the amount to the supplier's ledger.

1. Press F9 (or **Purchase** in the Action Pane).
2. Enter the **Supplier Inv No** (1) exactly as printed and check the date.
3. Choose the **Supplier** (2). Their phone, current balance and GSTIN appear. Leave **A/c** empty for a credit purchase, or pick Cash / Bank if you paid now.
4. Tick **Interstate** for a supplier from another state (IGST) and **Rates include GST** (3) if the bill rates include tax.
5. Add each item (4): type the name, Enter, quantity, Enter. The cost rate fills from the item; change it to the bill rate.
6. Add freight, packing or a discount as **Ledger charges** if the bill has them.
7. Check the GST (5) against the supplier's bill and click **Save Purchase** (6).
8. In **Bill Reference Details** keep **New Ref**, add the **Due Date** and click **Save Voucher**.

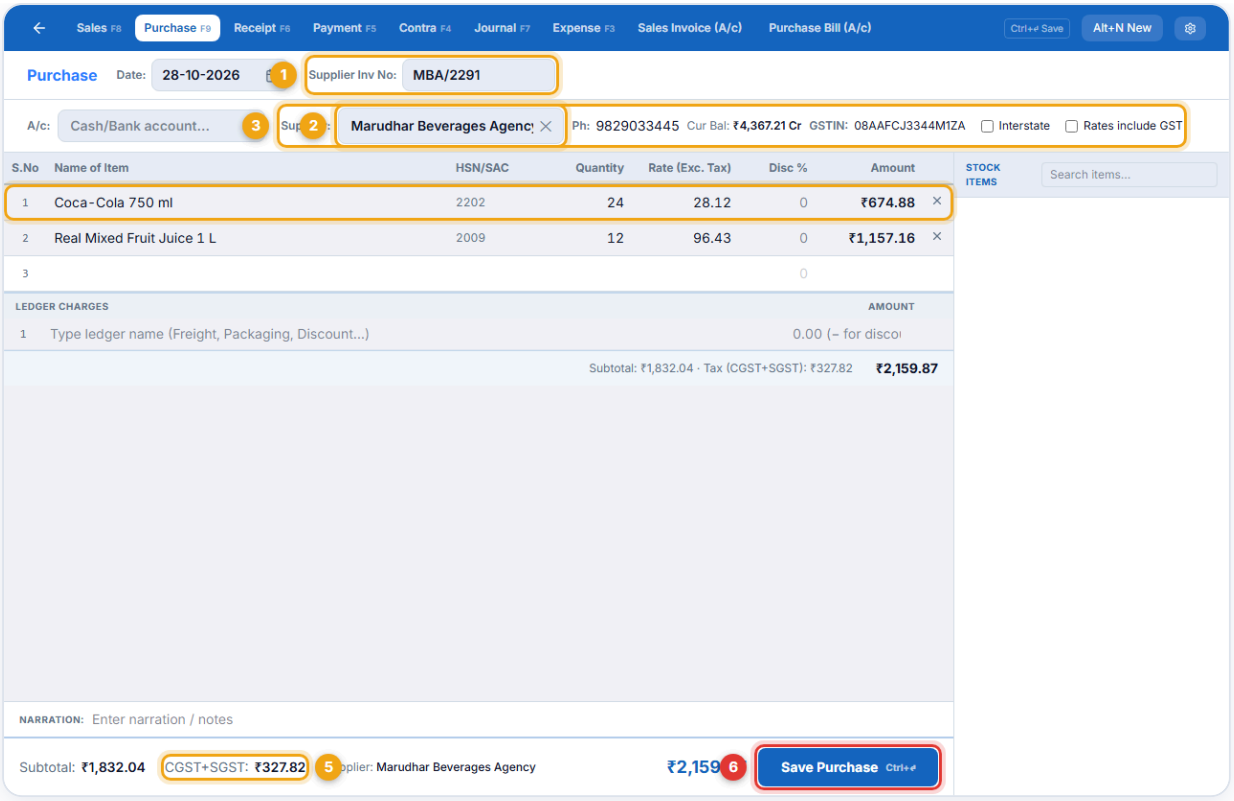

Figure Purchase from Marudhar Beverages Agency, bill MBA/2291

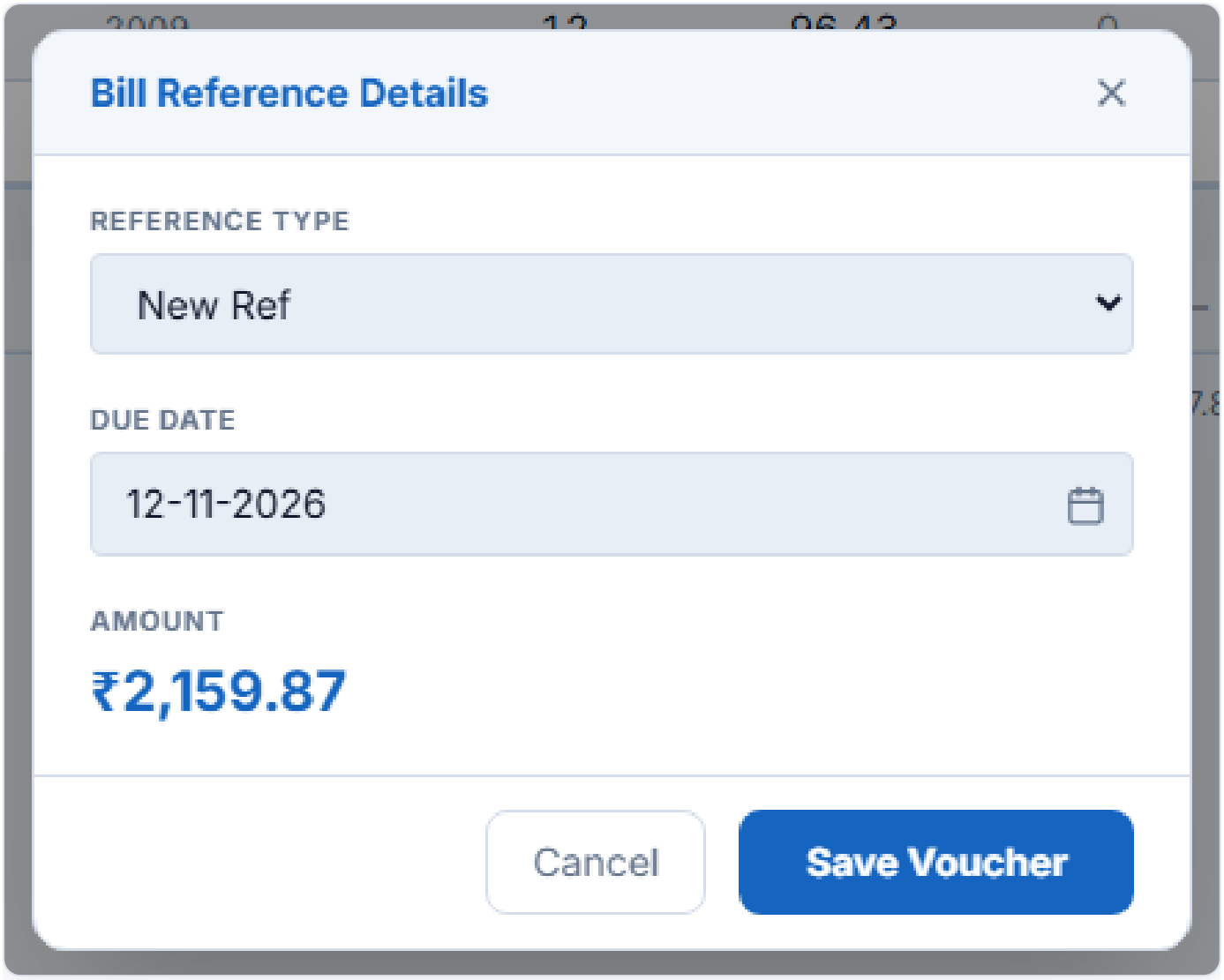

Figure Bill reference with due date 12-11-2026

WORKED EXAMPLE **Purchase bill MBA/2291**

1. 24 Coca-Cola 750 ml @ ₹28.12 + 28% GST and 12 Real Mixed Fruit Juice 1 L @ ₹96.43 + 12% GST
2. Taxable ₹1,832.04 + GST ₹327.82 = **₹2,159.87**, on credit, due 12-11-2026
3. Stock of both items goes up and ₹327.82 is available as ITC.

Purchase orders

Use a purchase order to order goods before they arrive.

1. Open **Purchase Orders** and click **New PO**.
2. Choose the **Supplier** (1) and the **Payment Mode** (2): Cash, your bank, or Credit.
3. Enter the supplier invoice number and date (3) if you already have the bill, and an expected date.
4. Add items (4) from the search box or the list on the right.

5 For each line enter **Qty (Actual)** — what you receive — and **Qty (Billed)** — what the supplier charges — plus rate and discount (5).

6 Click **Create Order** (6).

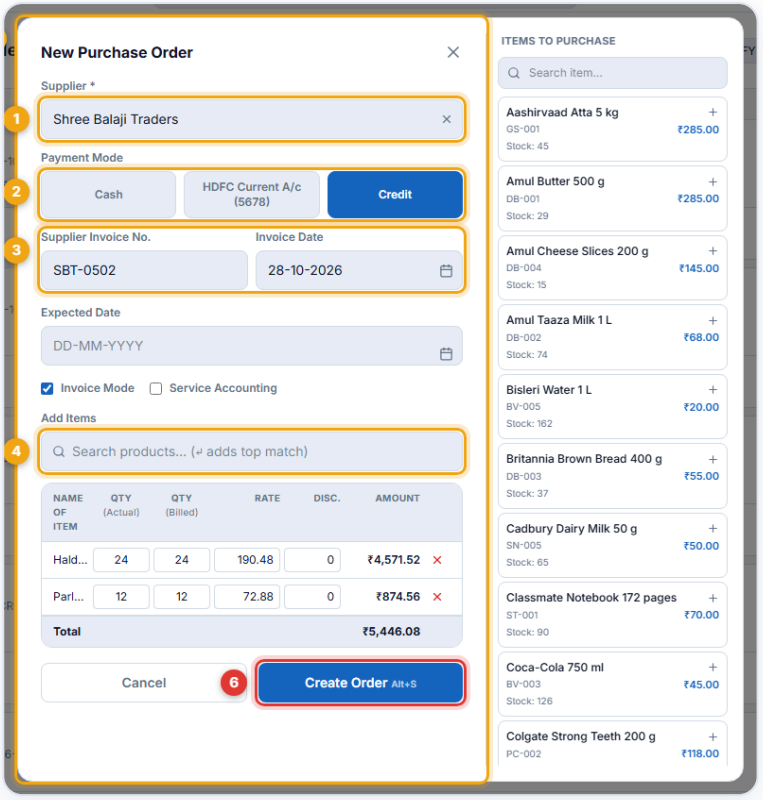

Figure New Purchase Order — Shree Balaji Traders, 24 Aloo Bhujia and 12 Parle-G

WARNING
Qty (Billed) starts at 1 and does not follow the quantity you type in Qty (Actual). Always check both columns and the Total before you click Create Order.

Receive the goods

An open order shows **Ordered**. When the goods arrive, click **Mark Fully Received** (2). Stock goes up and the bill is booked to the supplier. **Cancel Order** cancels an order that will not come.

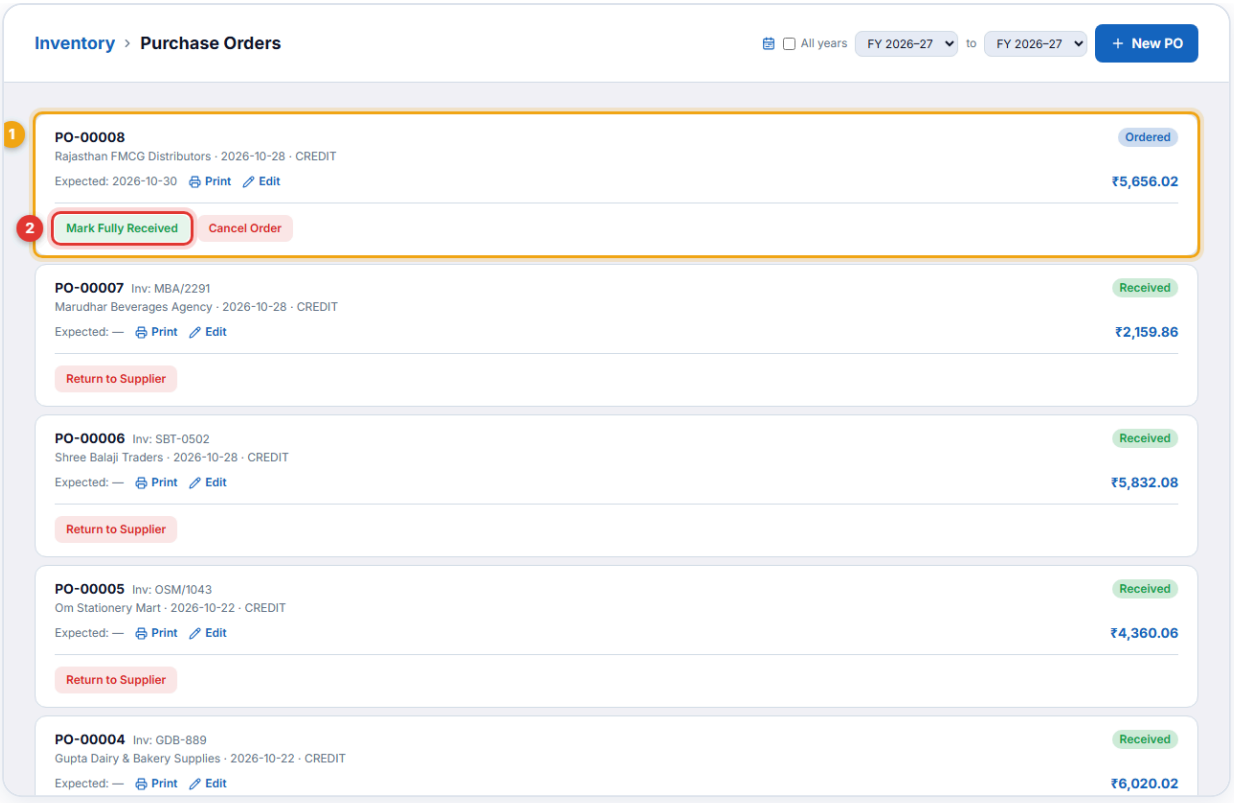

Figure PO-00008 from Rajasthan FMCG Distributors — ready to receive

> ★ **TIP**
> For GST purchase bills prefer the Purchase voucher (F9) shown above — it shows the tax for each line before you save, so you can match it with the supplier's bill.

Purchase returns and the purchase register

1. Open the received purchase in **Purchase Orders** and click **Return to Supplier**.
2. Confirm. The stock goes back out and a debit note is created against the supplier.

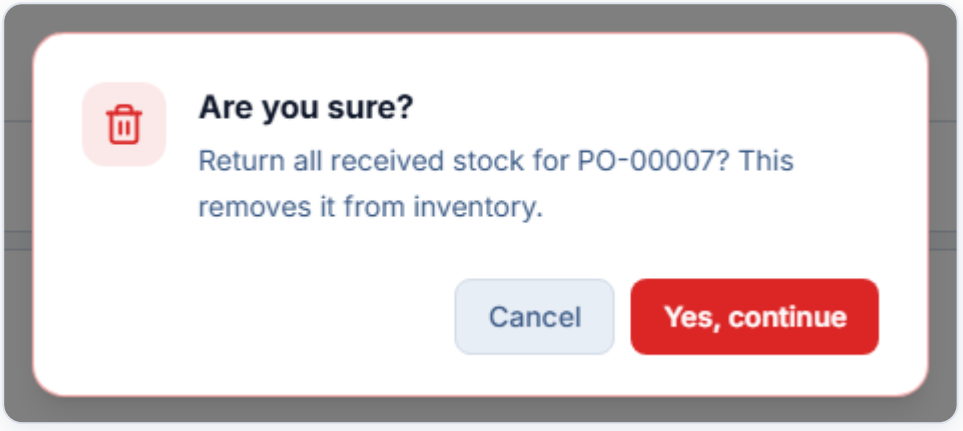

Figure Return all received stock — confirm first

Purchases lists every purchase with the total spent; **Finance** → **Supplier Bills** shows each bill with due date, paid amount, balance and status, and a **Pay** button.

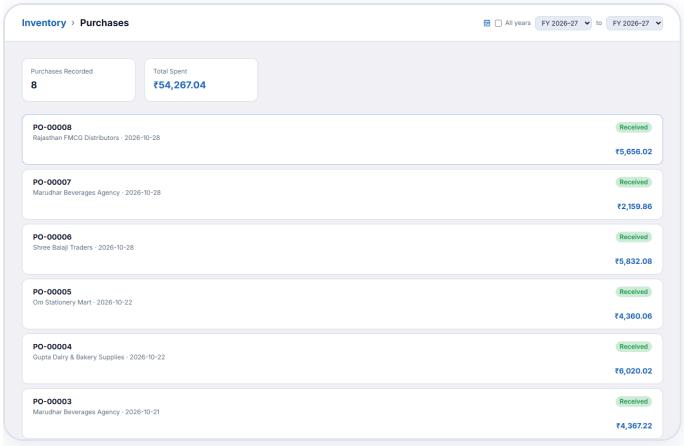

Figure Purchases — 8 recorded, ₹54,267.04

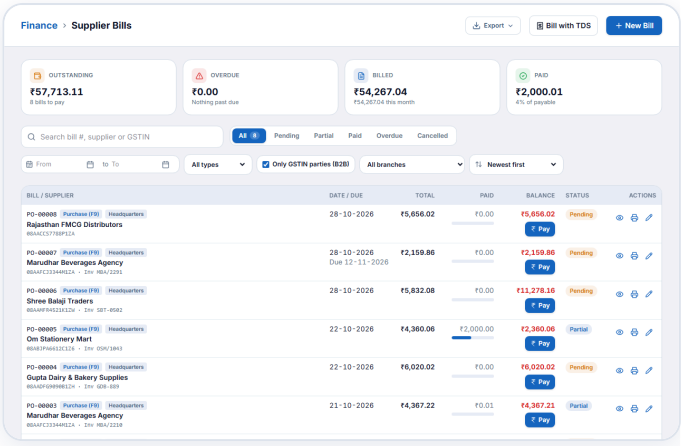

Figure Supplier Bills with Pay buttons

CHAPTER 10

10 Customers, Khata and Offers

Save regular customers to sell on credit, track what they owe, reward loyalty and send reminders and offers.

Jaldi samjhein (Hinglish quick start)

Customer **Customers** → **Add Customer** se banaiye. Credit limit set kijiye, khata (udhaar) **General Store** → **Khata Ledger** mein dikhega. WhatsApp reminder aur coupon **Offers & Portal** se.

Customer list

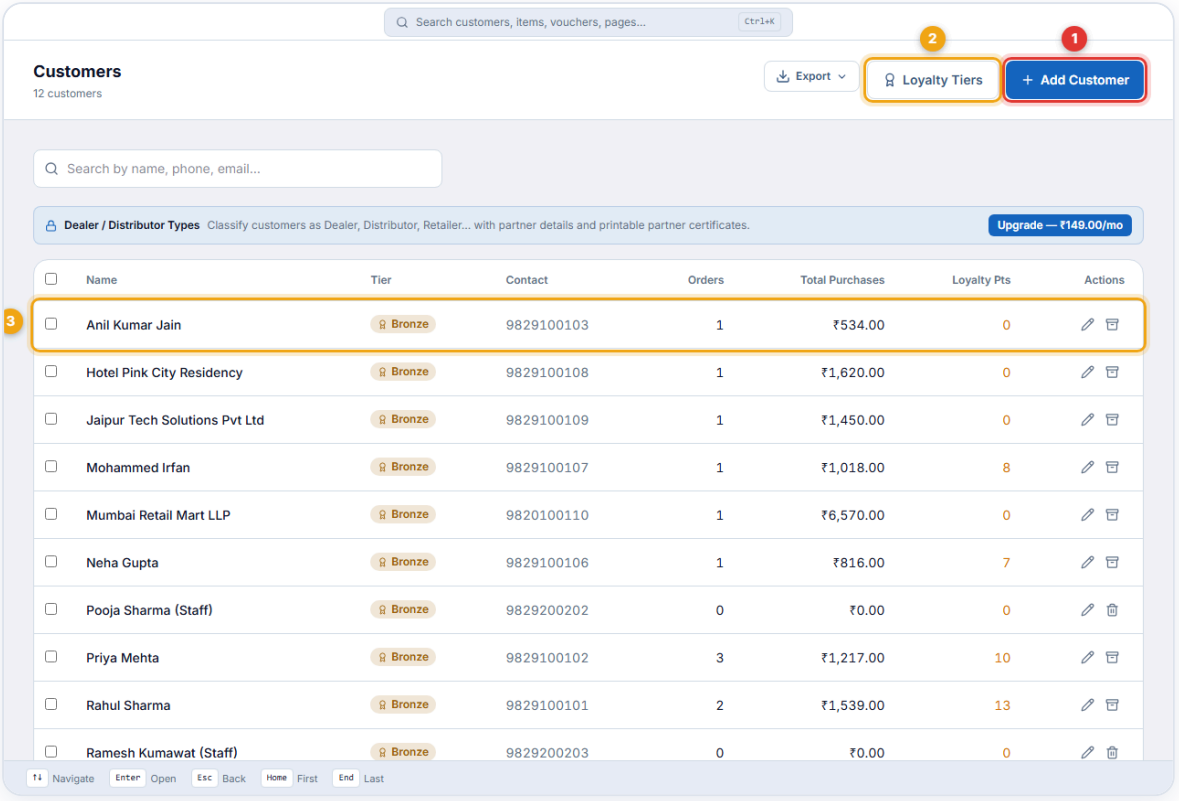

Figure Customers — tier, orders, purchases and loyalty points

1. **Add Customer** (1) — new customer.
2. **Loyalty Tiers** (2) — Bronze, Silver, Gold rules and points rate.
3. Click a customer (3) to open their profile.

Add a customer

1. Click **Add Customer**.
2. Enter the **Name** and **Mobile** — the mobile is how you find them at the counter. Add the email if you will email bills.

3. Enter the billing address. For a business customer enter the **GSTIN**; the state fills in automatically and their bills become B2B invoices.
4. Enter an **Opening Balance** (Dr = they owe you) and a **Credit Limit**.
5. Choose a **Rate Type** (price level) such as Wholesale if they get special prices.
6. Click **Create Customer**.

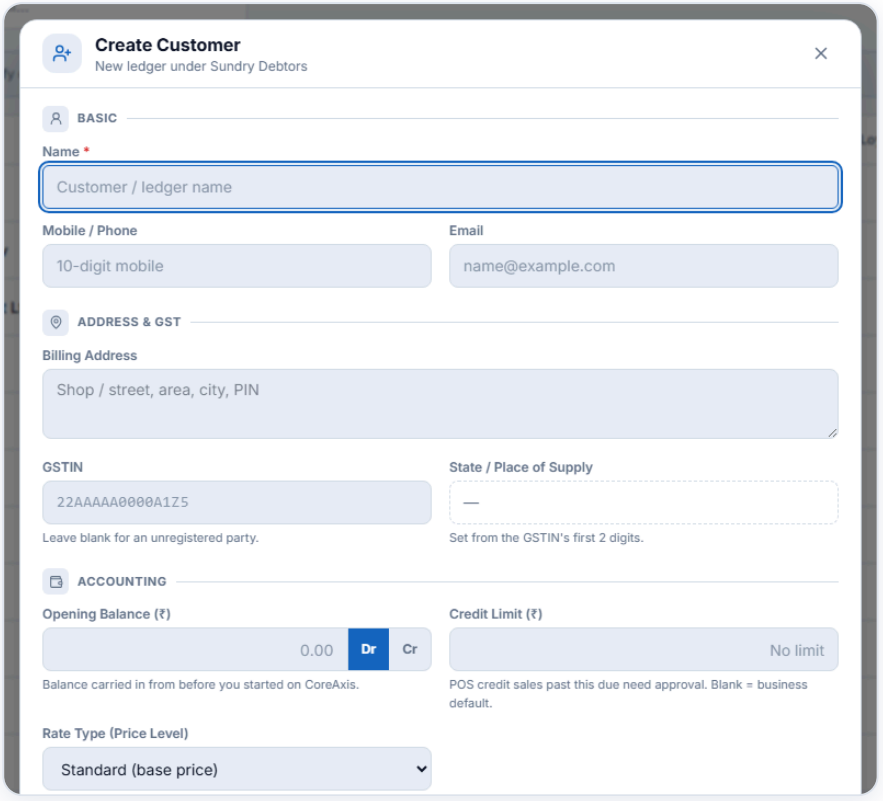

Figure Create Customer

Customer	Type	Credit limit	Opening due
Hotel Pink City Residency	B2B, GSTIN 08AAKFK1212E1ZS	₹50,000	₹8,500
Jaipur Tech Solutions Pvt Ltd	B2B, GSTIN 08AAGCH4545N1Z4	₹40,000	—
Mumbai Retail Mart LLP	B2B, other state (27 — Maharashtra), IGST	₹25,000	—
Anil Kumar Jain	Retail	₹10,000	₹1,200
Rahul Sharma, Priya Mehta, Sunita Agarwal …	Retail	₹3,000 – ₹8,000	—

Customer profile and ledger

The profile shows contact details, total spent, orders, average order, loyalty points and purchase history. **View Ledger Statement** opens every bill, receipt and adjustment with the running balance; you can print or share it.

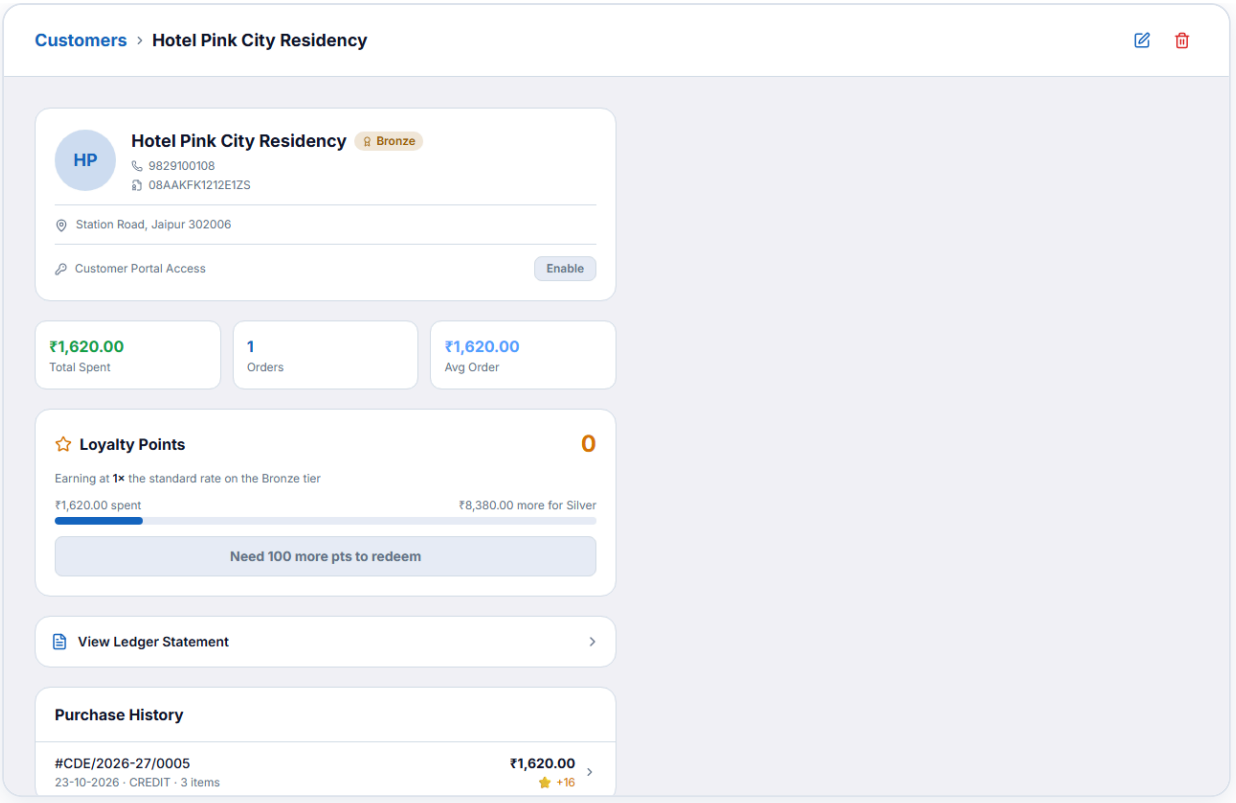

Figure Hotel Pink City Residency

TIP

Turn on **Customer Portal Access** to let a business customer see their own bills, statement and pay online.

Khata (credit) ledger and reminders

General Store (for general-store businesses) brings the khata together: **Khata Ledger** (1) lists every customer with dues, **Loose Items** handles weighed goods, and **Khata Reminders** (2) sends WhatsApp / SMS reminders. Each row (3) has statement, receive-payment and WhatsApp buttons.

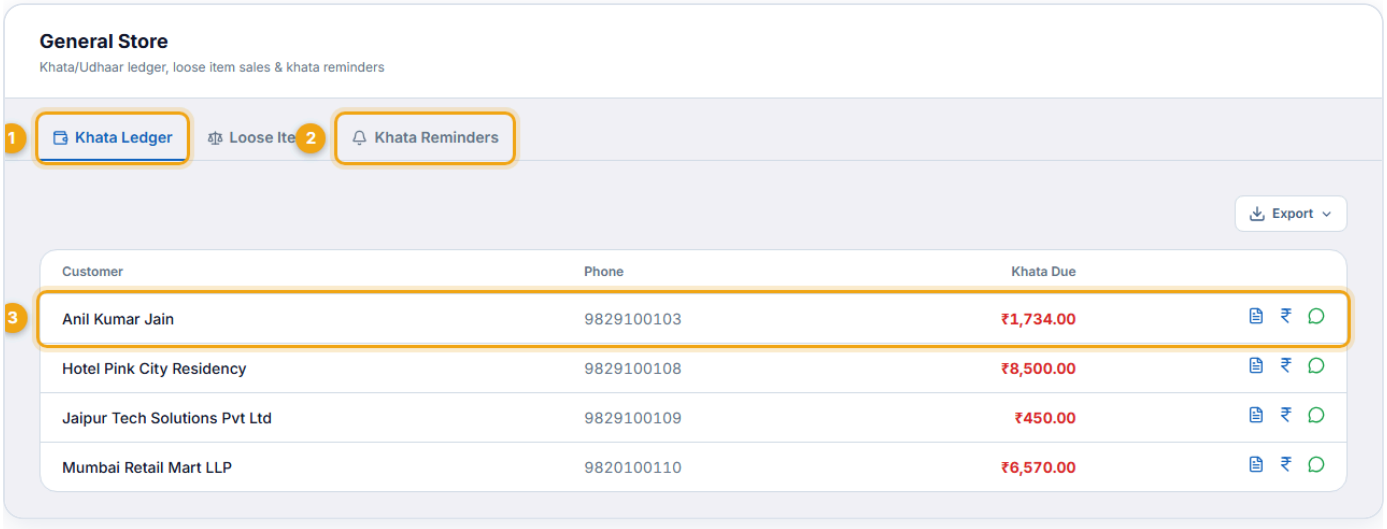

Figure Khata Ledger — Hotel Pink City ₹8,500, Mumbai Retail Mart ₹6,570

Offers, loyalty and the customer portal

Offers & Portal has tabs for **Coupons** (1), SMS and message campaigns, **Loyalty** (2) and the **Customer Portal** (3).

1. On **Coupons**, type a code such as **DIWALI10**, a description, % or ₹ off, minimum bill and maximum discount, the valid dates and the total uses.
2. Click **Save coupon**. The cashier types the code in the POS **Coupon** box.
3. Send the coupon to customers through an SMS or WhatsApp campaign.

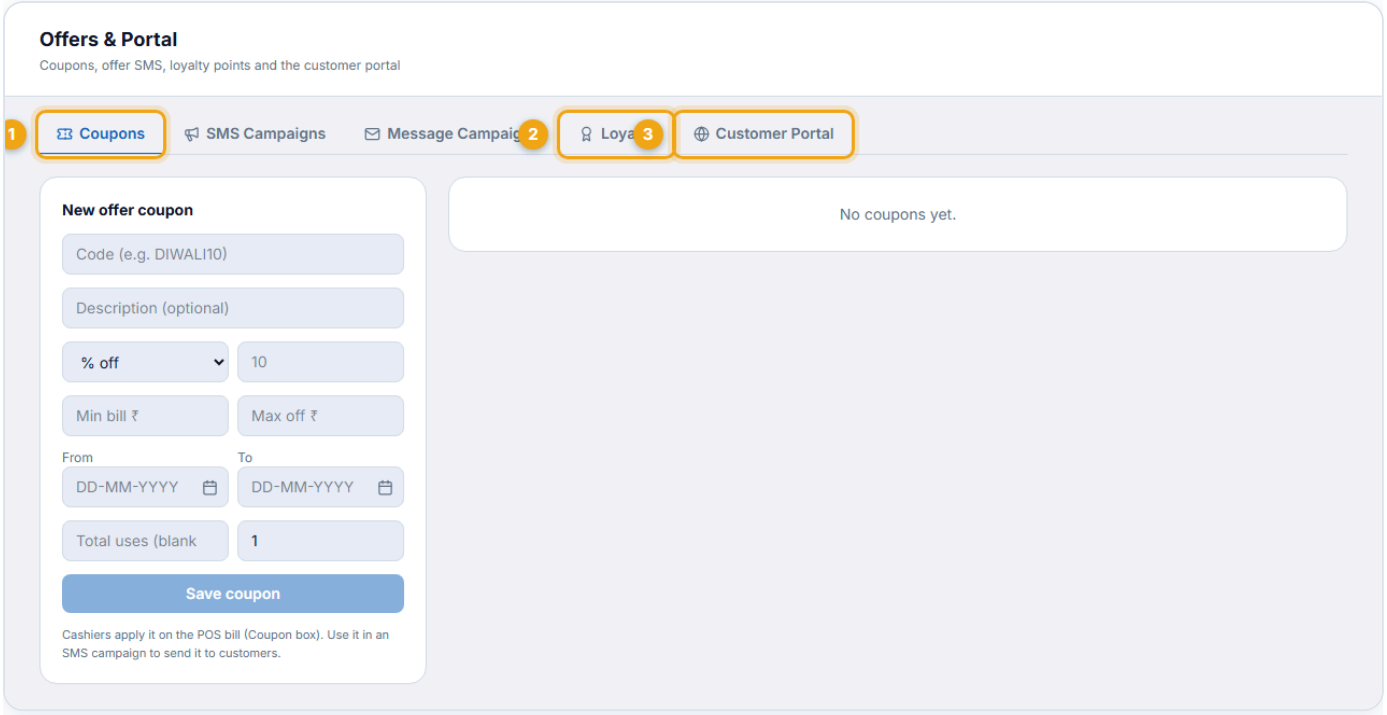

Figure Offers & Portal — new coupon

CHAPTER 11

11 Finance and Accounting

Every bill, purchase, receipt and expense is posted to the accounts automatically. This chapter shows how to read the books, collect and pay money, record expenses, move cash to the bank and pass journal entries.

Jaldi samjhein (Hinglish quick start)

Accounts apne aap bante hain. Customer se paisa aaya → **Receipt (F6)**, supplier ko diya → **Payment (F5)**, kharcha → **Expense (F3)**, cash bank mein jama → **Contra (F4)**. Cash Book, Day Book, P&L sab Finance mein.

Finance overview

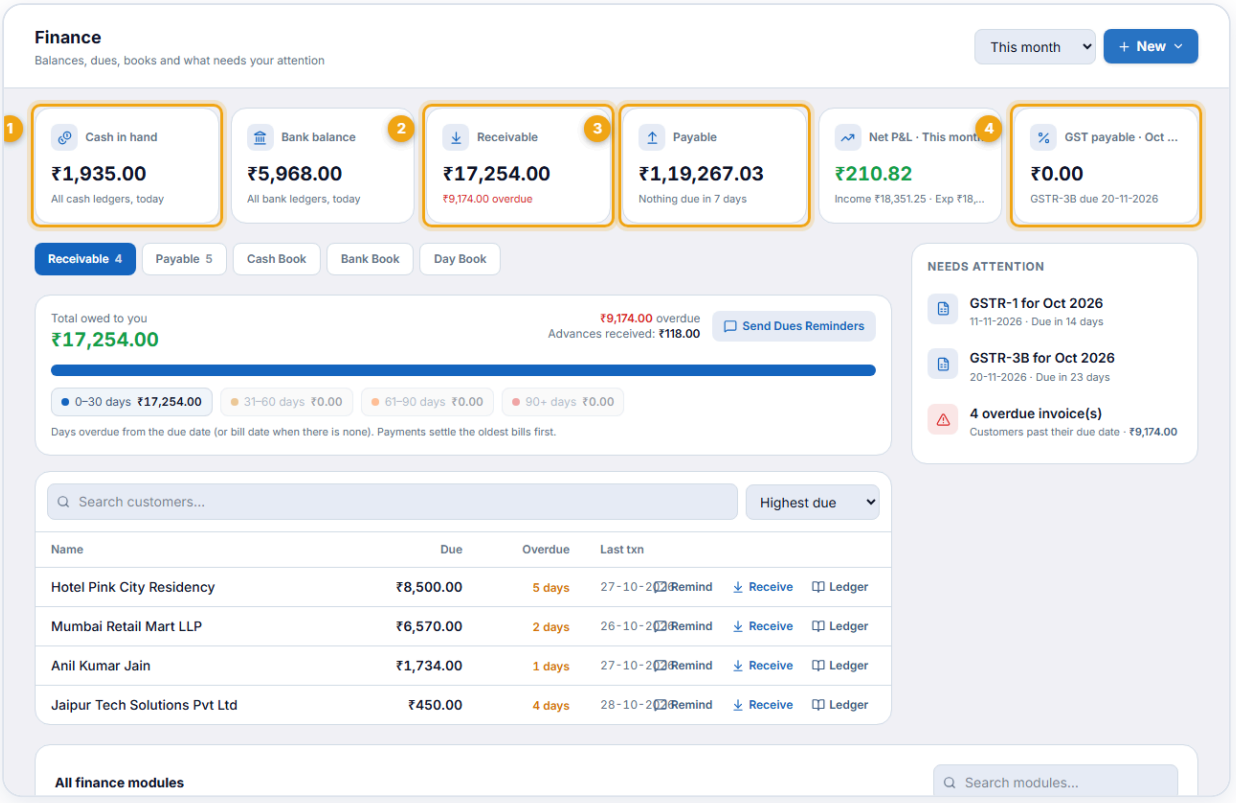

Figure Finance — cash, bank, receivable, payable, profit, GST

1. **Cash in hand (1)** and bank balance — today, all cash and bank ledgers.
2. **Receivable (2)** — what customers owe you, with the overdue part.
3. **Payable (3)** — what you owe suppliers.
4. **Net P&L** for the period and **GST payable (4)** with the GSTR-3B due date.
5. Below: ageing of dues (0–30, 31–60, 61–90, 90+ days), **Send Dues Reminders**, a list of who owes what with **Remind**, **Receive** and **Ledger** buttons, and **Needs attention** (returns due, overdue invoices).

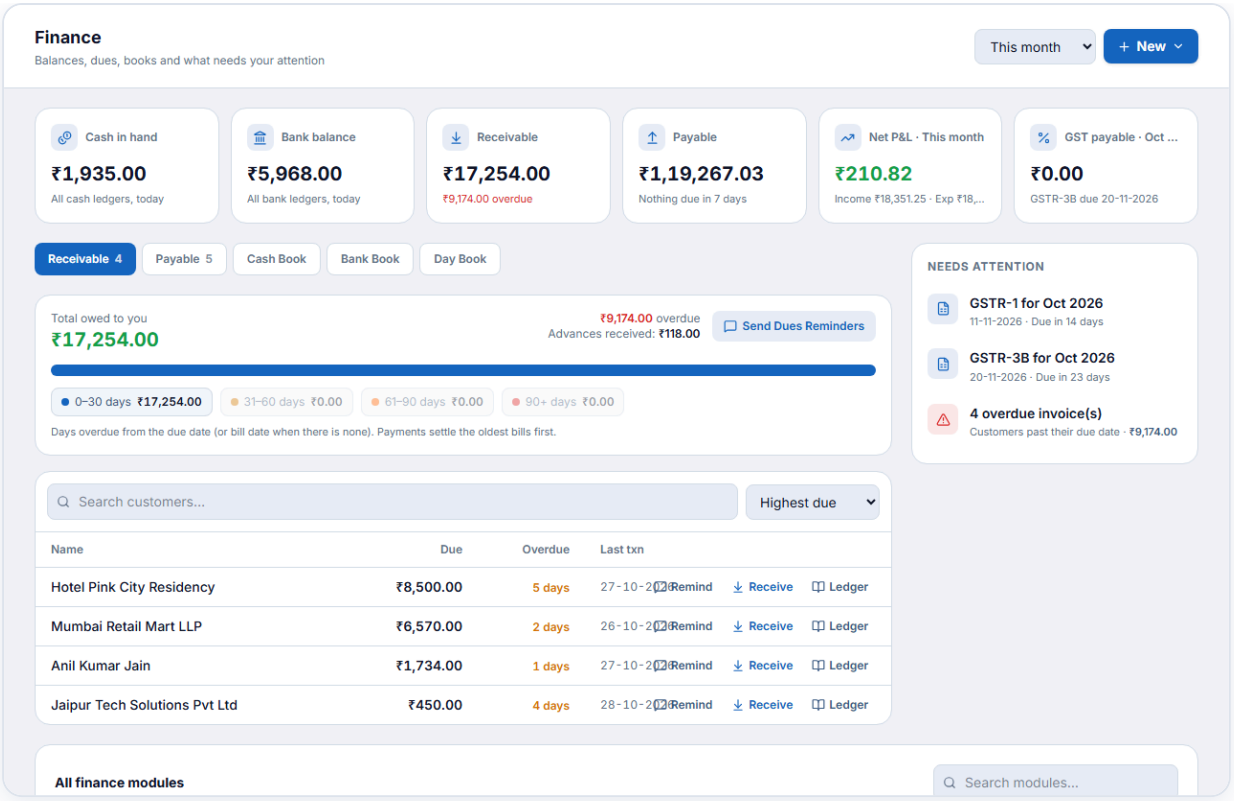

Figure Who owes you and what needs attention

Chart of accounts

Finance → Chart of Accounts holds every ledger, grouped Tally-style: Current Assets, Fixed Assets, Current Liabilities, Capital, Sales, Direct and Indirect Income and Expenses. Customers sit under Sundry Debtors and suppliers under Sundry Creditors automatically.

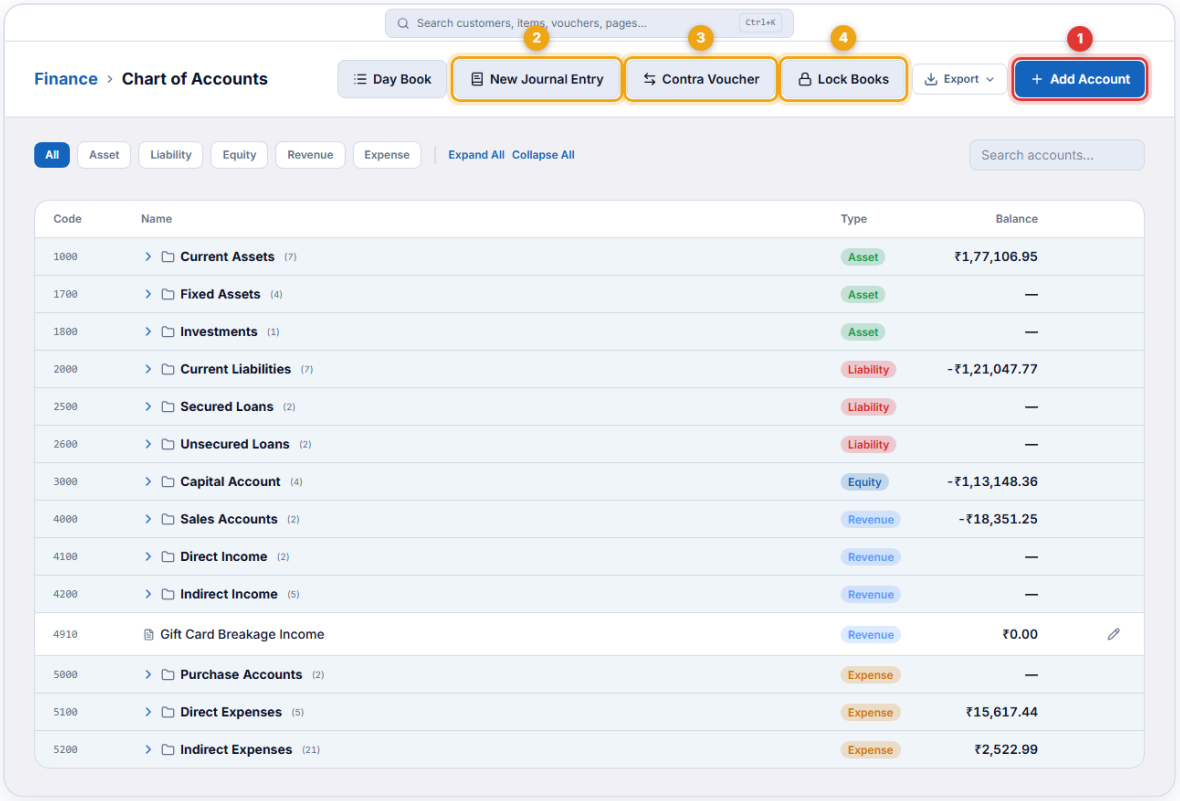

Figure Chart of Accounts

- **Add Account** (1) — a new ledger, e.g. a second bank account or a loan.
- **New Journal Entry** (2) and **Contra Voucher** (3).
- **Lock Books** (4) — stop changes up to a date.

Receive money from a customer — Receipt (F6)

1. Open **Finance** → **Customer Receipts** and click **Add Receipt** (or press F6).
2. Choose the **Customer**. Their pending bills are listed.
3. Enter the **Amount** and choose how it was paid: Cash, your bank account (UPI / NEFT) or Card.
4. Enter the date and the cheque / UTR number in **Reference**.
5. Allocate the amount to the bills it pays (oldest first by default) and save.

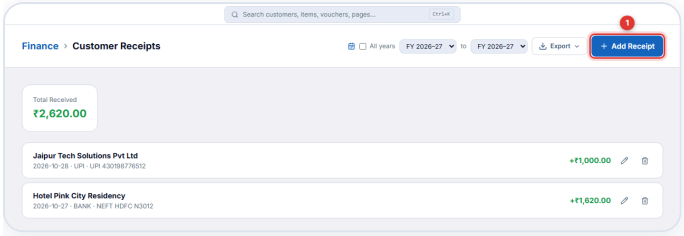

Figure Customer Receipts — ₹2,620 received

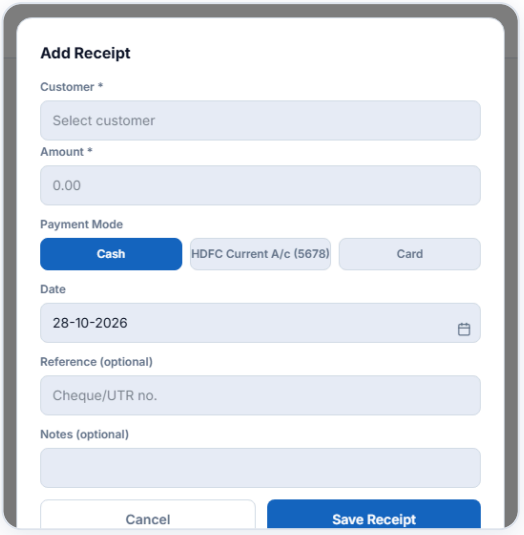

Figure Add Receipt

WORKED EXAMPLE **Hotel pays its bill**

1. 27 Oct: Hotel Pink City Residency paid ₹1,620 by NEFT (ref NEFT HDFC N3012) against bill CDE/2026-27/0005.
2. 28 Oct: Jaipur Tech Solutions paid ₹1,000 by UPI as part payment of ₹1,450.

Pay a supplier — Payment (F5)

1. Open **Finance** → **Supplier Payments** and click **Add Payment** (or press F5).
2. Choose the supplier, enter the amount, the payment mode, date and reference.
3. Allocate it to their bills and save.

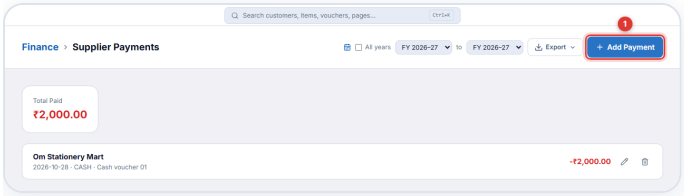

Figure Supplier Payments

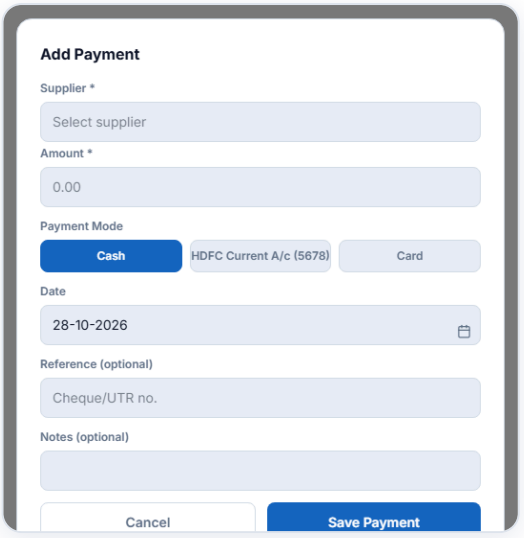

Figure Add Payment

> **WARNING**
> Cash and bank accounts cannot go below zero. If you see “Insufficient balance”, record the day’s cash sales or receipts first, or pay from another account.

Expenses — Expense (F3)

1. Open **Finance** → **Expenses** and click **Add Expense** (or press F3).
2. Enter a **Title** and the **Amount** before GST.
3. Choose the **Category** (Rent, Utilities, Salaries, Transport, Marketing, Maintenance …); the expense ledger fills in.
4. If the expense has a GST bill, enter the GST rate, SAC and the supplier’s GSTIN so the input tax credit is claimed.
5. Choose the payment mode and save. Set **Recurrence** for monthly bills such as rent.

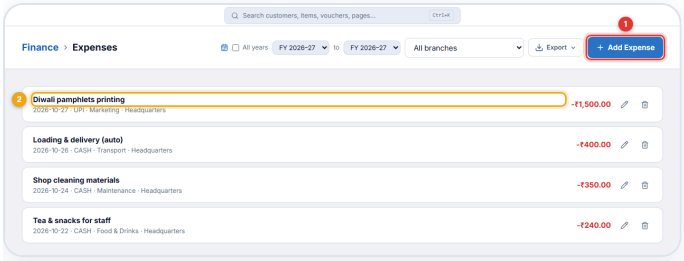

Figure Expenses — four entries this month

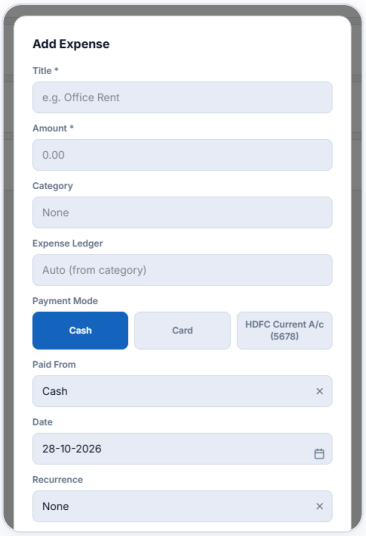

Figure Add Expense

WORKED EXAMPLE **Diwali pamphlets**

1. Title: Diwali pamphlets printing · Category: Marketing · ₹1,500 + 18% GST (SAC 998912)
2. Paid by UPI · supplier GSTIN 08AAMFR4521K1ZW → ITC ₹270 claimed

Voucher entry: receipt, payment, contra and journal

Voucher Entry (V) is the keyboard screen for all vouchers. Tabs along the top: Sales F8, Purchase F9, Receipt F6, Payment F5, Contra F4, Journal F7, Expense F3, Sales Invoice (A/c) and Purchase Bill (A/c). Ctrl + Enter saves; Alt + N starts a new one; Alt + C creates a ledger on the spot.

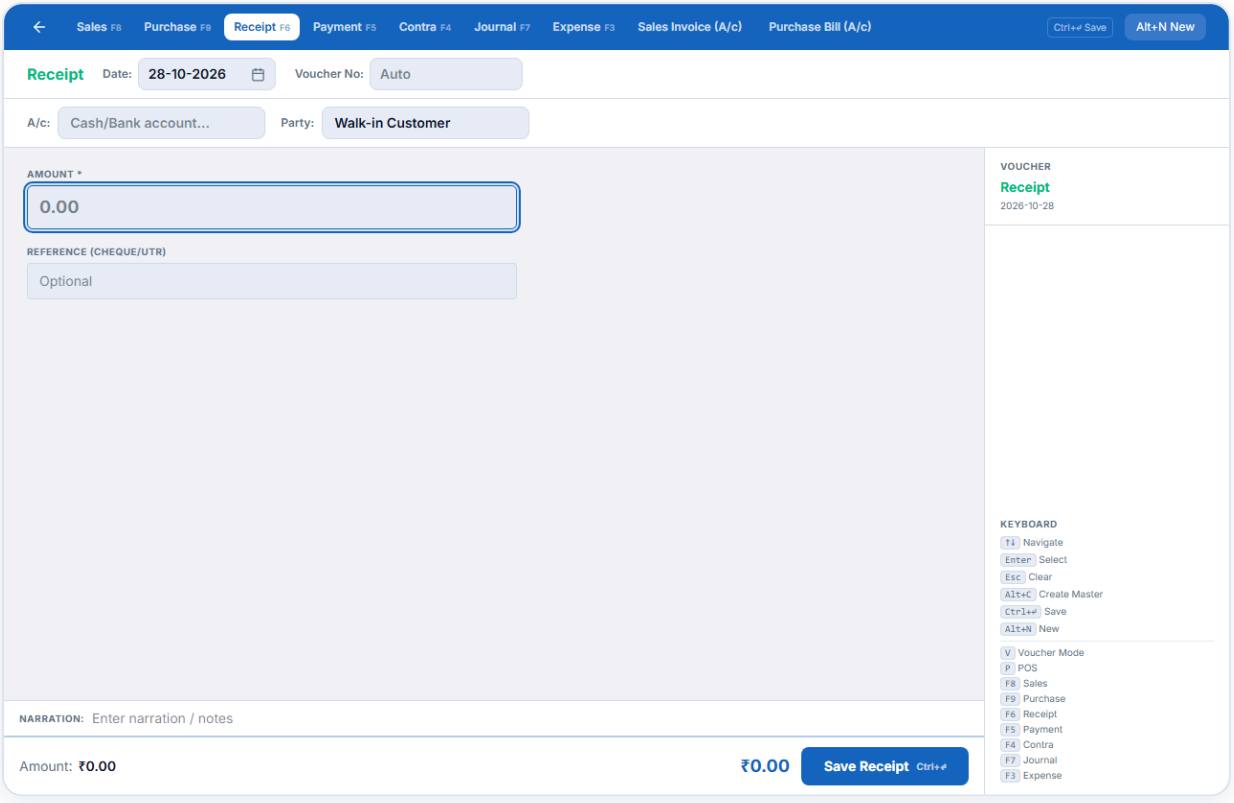

Figure Receipt voucher

- **Contra (F4)** — money between your own accounts: **Transfer From** cash, **Transfer To** bank, amount. Use it when you deposit the day's cash in the bank.
- **Journal (F7)** — adjustments with no cash: depreciation, a rate difference, opening balances, correcting a wrong ledger.

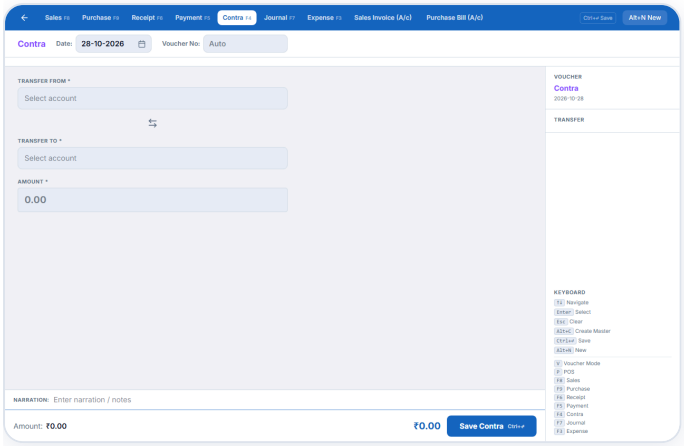

Figure Contra — cash deposited in bank

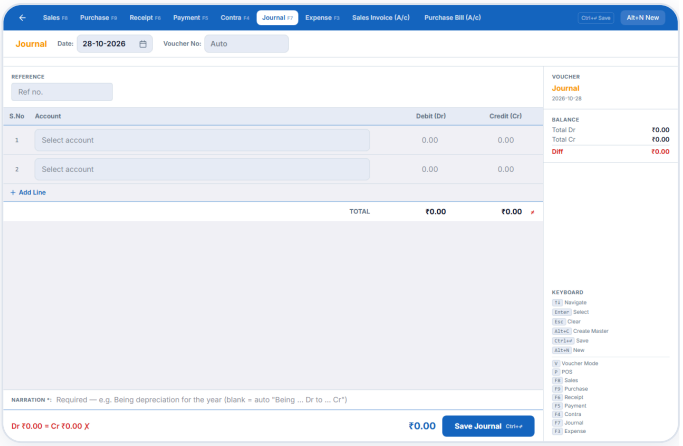

Figure Journal voucher

Books: cash book, bank book, day book and statements

1. **Finance → Books & Statements** has **Cash Book** (1), Bank Book, **Customer Statement** (2) and Supplier Statement. Pick the account and dates; every entry (3) shows debit, credit and the running balance. Click a row to open its voucher.

2. **Day Book** lists every voucher for a period with type filters (Sales, Purchase, Receipt, Payment, Expense, Journal, Contra). Each row can be opened, edited or cancelled if your role allows.

3. **Account Books** shows any register or ledger month by month — click a month for its vouchers.

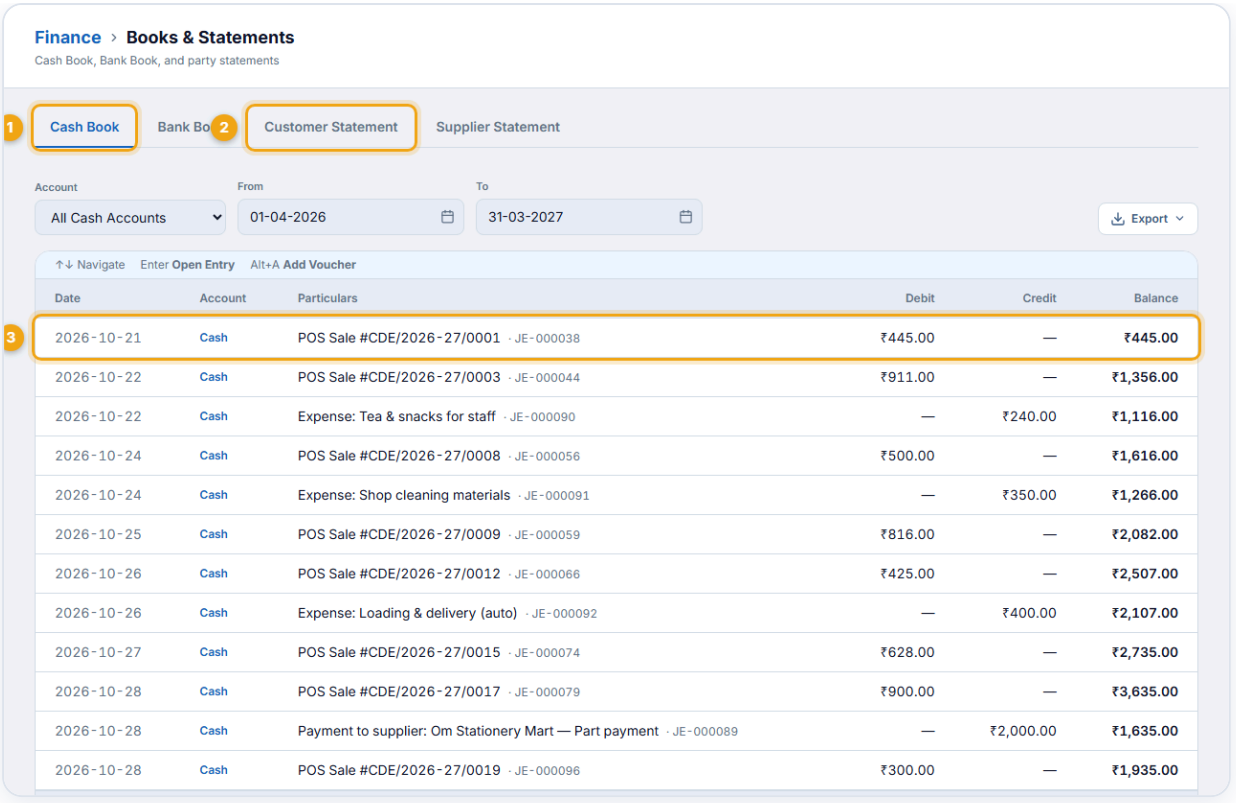

Figure Cash Book — sales, expenses and payments with running balance

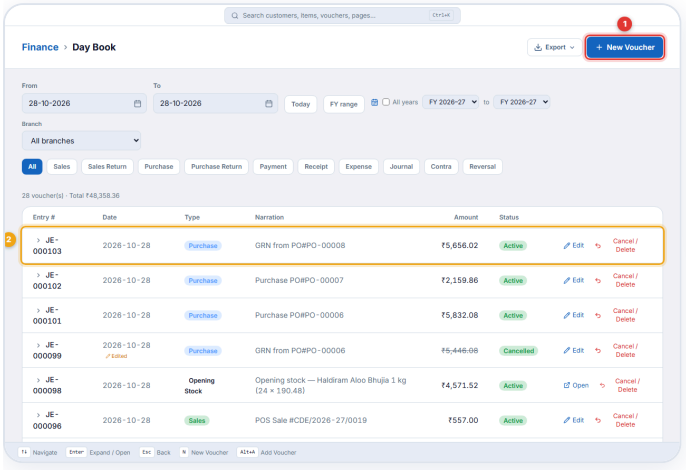

Figure Day Book

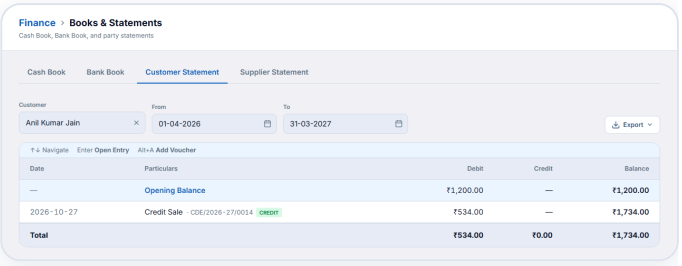

Figure Customer statement — Anil Kumar Jain

Profit & loss and balance sheet

Finance → **Financial Statements** shows the **Profit & Loss** and **Balance Sheet** for any period and branch. Expand a group to see its ledgers; **Export** to Excel or PDF for your accountant.

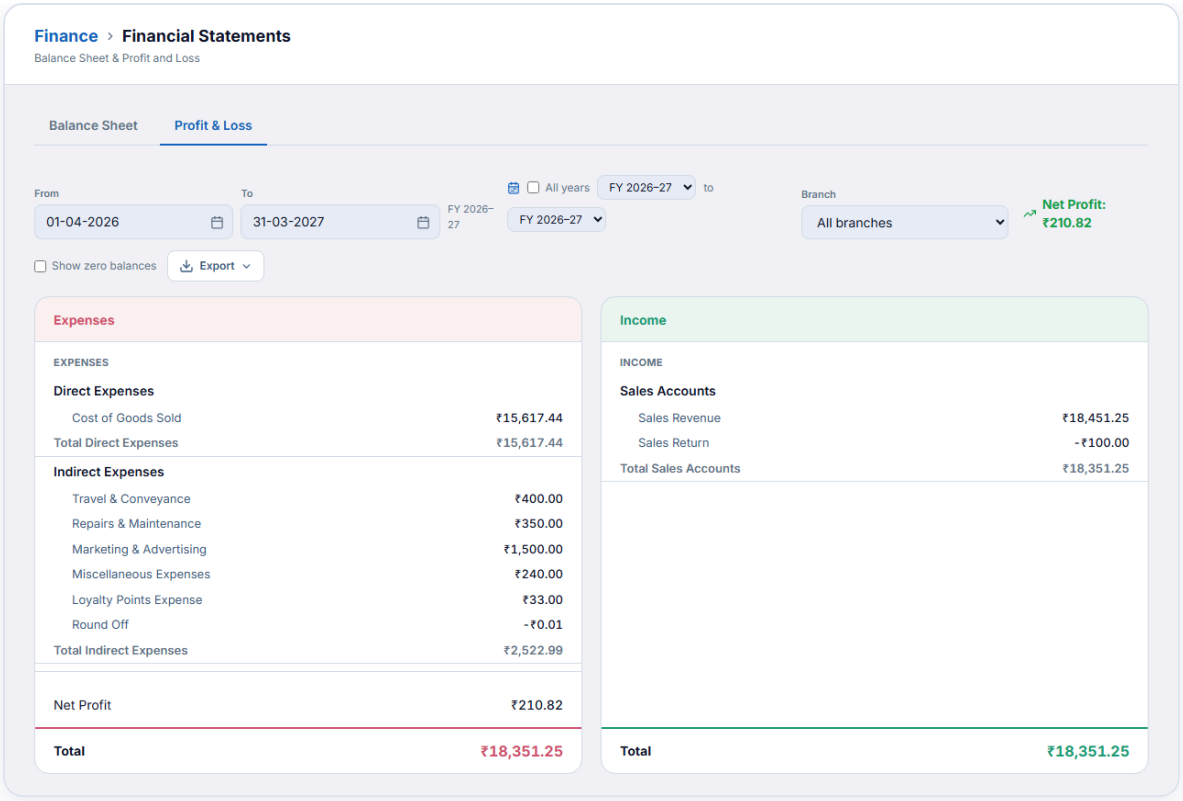

Figure Profit & Loss — sales ₹18,351.25, net profit ₹210.82 (sample data)

> **NOTE**
> Before you start, enter opening balances of cash, bank, capital, loans and assets so the balance sheet matches your real position.

Bank reconciliation and cheques

Bank Reconciliation imports your bank statement and matches it with the bank book. **Cheque Register** records cheques issued and received and tracks their clearance.

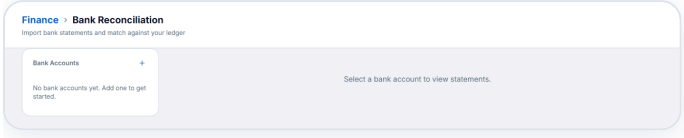

Figure Bank Reconciliation

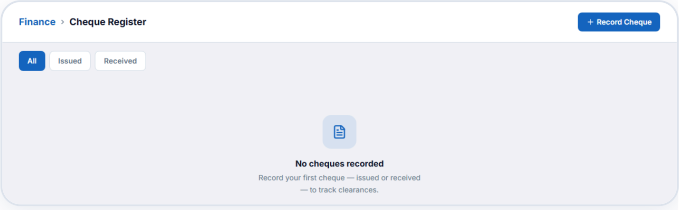

Figure Cheque Register

CHAPTER 12

12 GST Returns and Compliance

All the GST numbers come from your bills, purchases and expenses. The GST module prepares GSTR-1 and GSTR-3B, reconciles GSTR-2B, tracks input tax credit and handles e-invoices and e-way bills.

Jaldi samjhein (Hinglish quick start)

GST ke liye **Finance** → **GST**. Filing calendar mein due dates, **GSTR-1** (sales ka detail) aur **GSTR-3B** (summary + tax) ready milte hain. JSON / Excel download karke CA ko dijiye ya GSP se direct file kijiye.

GST dashboard

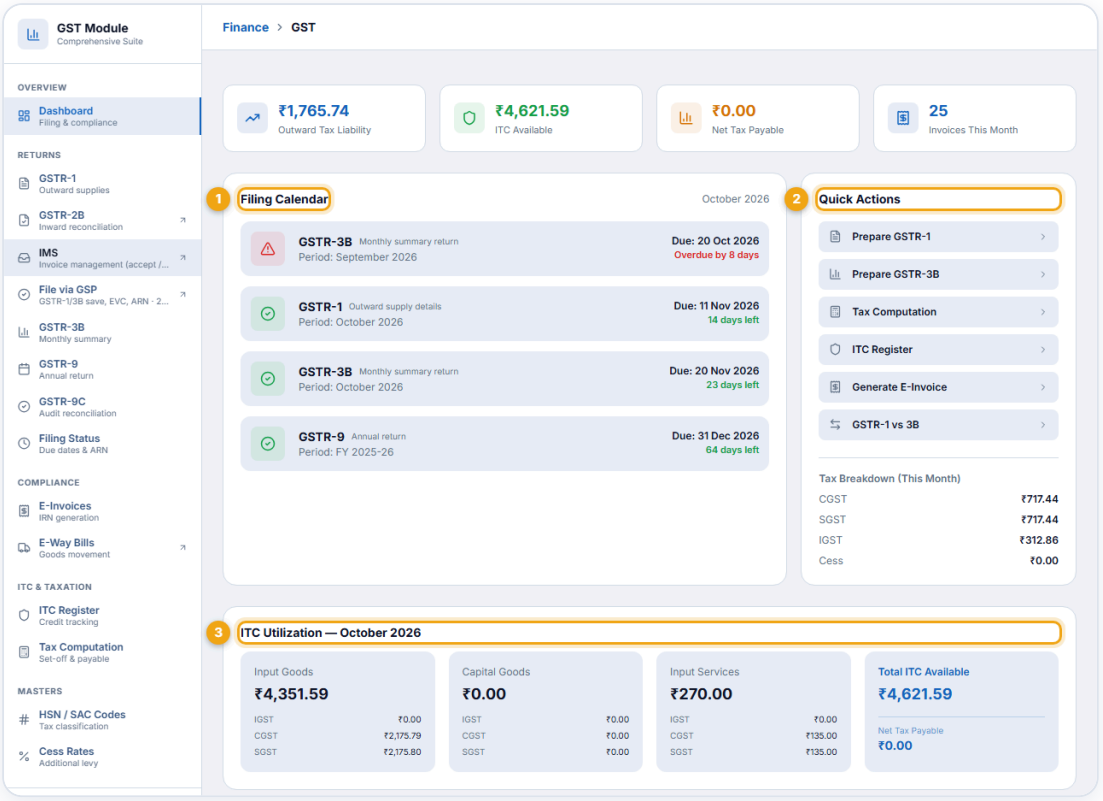

Figure GST Module — October 2026

1. Top cards: outward tax liability, ITC available, net tax payable and invoices this month.
2. **Filing Calendar (1)** — each return with its period, due date and status (overdue in red, upcoming in green).
3. **Quick Actions (2)** — Prepare GSTR-1, Prepare GSTR-3B, Tax Computation, ITC Register, Generate E-Invoice, GSTR-1 vs 3B.
4. **ITC Utilization (3)** — input tax credit from goods, capital goods and services, by IGST / CGST / SGST.

GSTR-1 — outward supplies

1. Click **GSTR-1** in the left menu and choose the period (from – to).
2. Check the summary: total invoices, taxable amount, tax and grand total.
3. Review the supply-type breakdown: **B2B** (customers with GSTIN), **B2CS** (small consumer sales), nil / exempt, and **CDNR** (credit / debit notes to registered parties).
4. Check the HSN-wise summary at the bottom.
5. Use **Table Wise** for the portal's table view and **Export GSTR-1** for JSON / Excel.

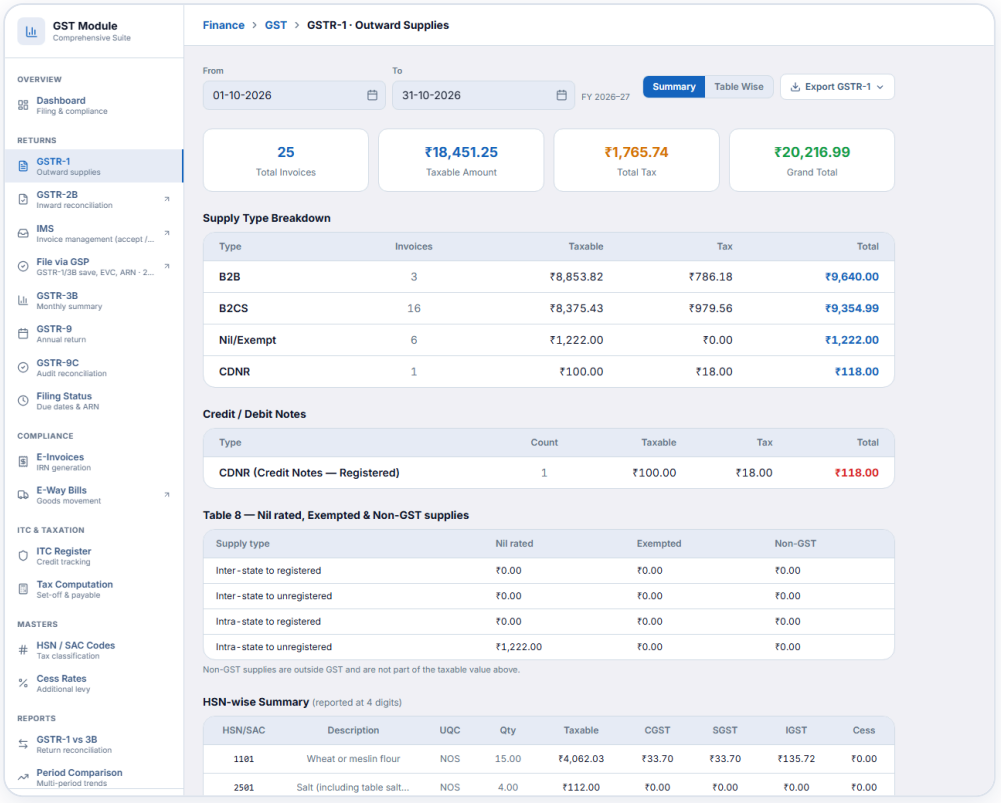

Figure GSTR-1 for October 2026 — 25 invoices, taxable ₹18,451.25

GSTR-3B — monthly summary

GSTR-3B shows Table 3.1 (outward supplies by type with IGST, CGST, SGST, cess), Table 4 (eligible ITC and its breakdown) and Table 5 (exempt and nil-rated inward supplies). Choose the year and month and export it.

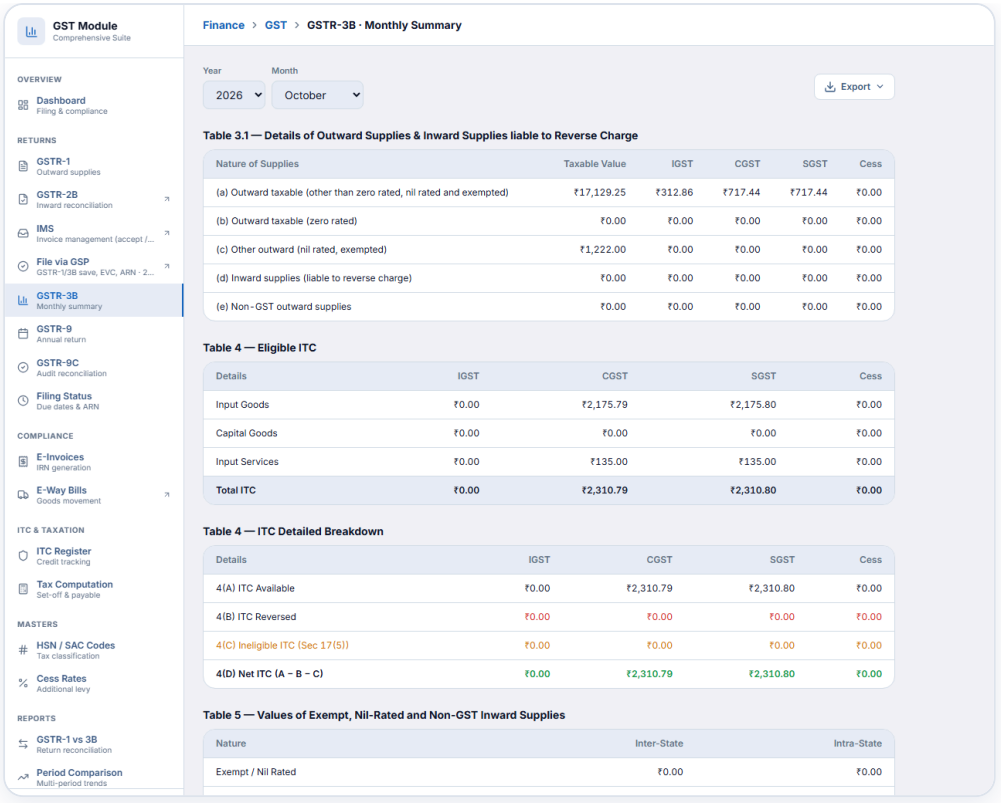

Figure GSTR-3B — October 2026

WORKED EXAMPLE **Inter-state sale in the example**

1. Mumbai Retail Mart LLP (Maharashtra) bought goods worth ₹6,570 on credit.
2. The bill was charged IGST, which appears in the IGST column of Table 3.1(a) — ₹312.86.

Filing online, e-invoice and e-way bill

GST Compliance files returns through a GST Suvidha Provider (GSP): start a portal session with OTP, **Prepare from books**, **Save to portal**, refresh the status, **Submit** and file with EVC. Until GSP credentials are added in **Settings** → **E-Invoice / GSP**, download the JSON / Excel and upload it on the GST portal or give it to your accountant.

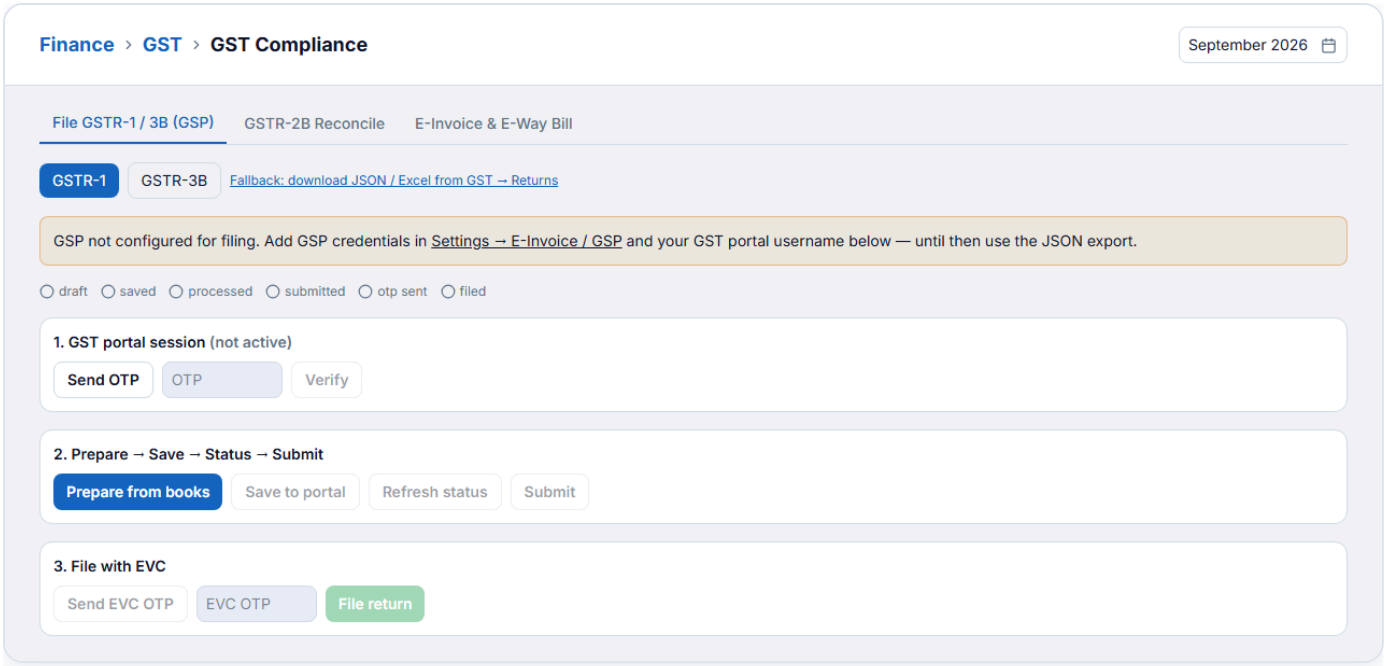

Figure GST Compliance — GSTR-1 / 3B through GSP

- **E-Invoices** — generate the IRN and signed QR for B2B invoices if your turnover requires e-invoicing.
- **E-Way Bills** — for goods movement above the limit; vehicle and transporter details come from the bill or challan.
- **GSTR-2B / IMS** — match suppliers' uploaded invoices with your purchases, and accept or reject them.

> **WARNING**
> Always check GSTR-1 against your sales register and GSTR-2B against your purchases before filing. File by the due date — 11th for GSTR-1 and 20th for GSTR-3B for monthly filers.

CHAPTER 13

13 Reports

Every report in one place — sales, stock and purchase, accounts, GST and dues — each with dates, branch filters, export, print and email schedule.

Jaldi samjhein (Hinglish quick start)

Sab reports **Reports** (F10) mein. Category chuniye (Sales, Stock, Accounts, GST, Dues), period set kijiye, Export / Print / Email schedule kijiye. Jo report roz dekhte hain use ★ se pin kar dijiye.

Reports home

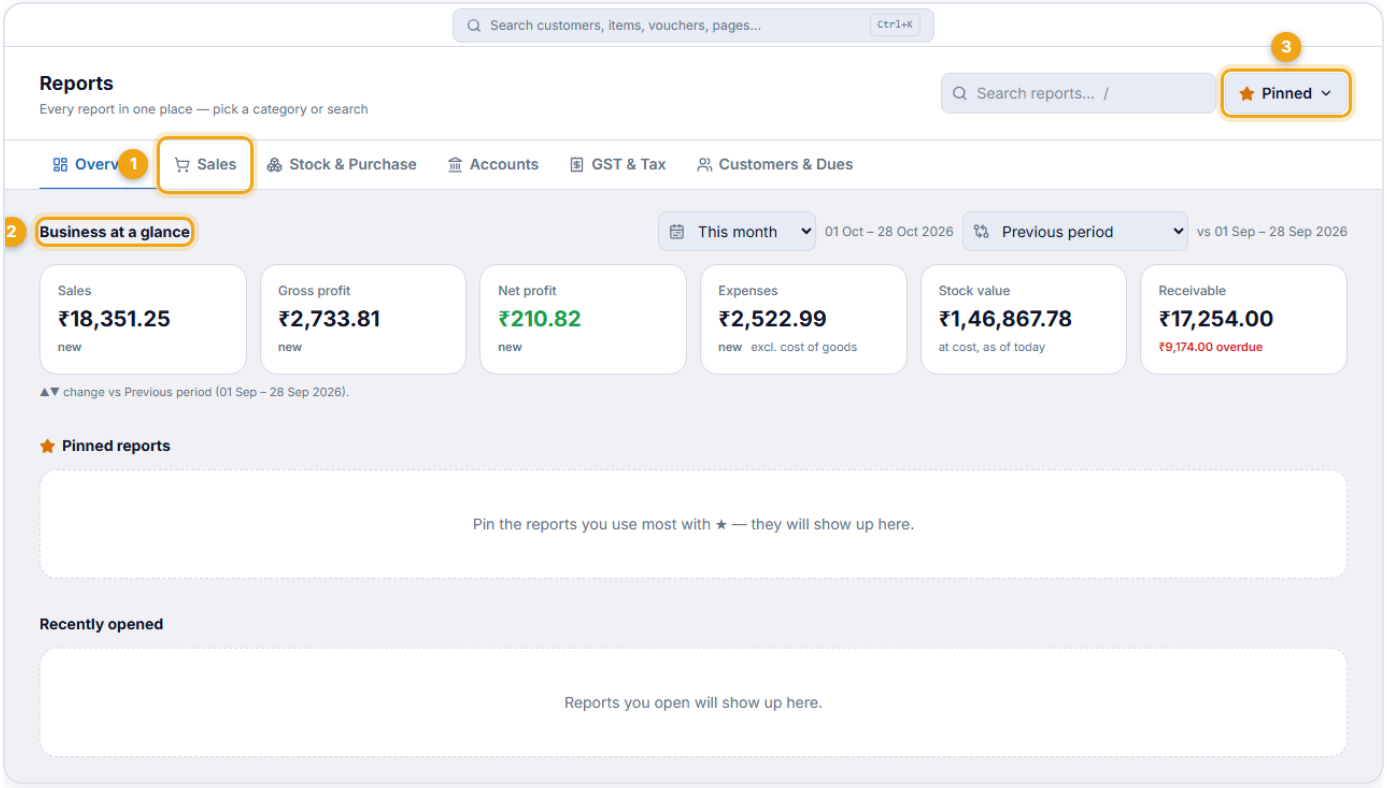

Figure Reports — business at a glance for this month

1. Pick a category tab (1): Overview, Sales, Stock & Purchase, Accounts, GST & Tax, Customers & Dues.
2. **Business at a glance (2)** — sales, gross profit, net profit, expenses, stock value and receivable for the chosen period, with a comparison to the previous period or last year.
3. Search reports by name, and click ★ on any report to add it to **Pinned** (3).

Sales reports

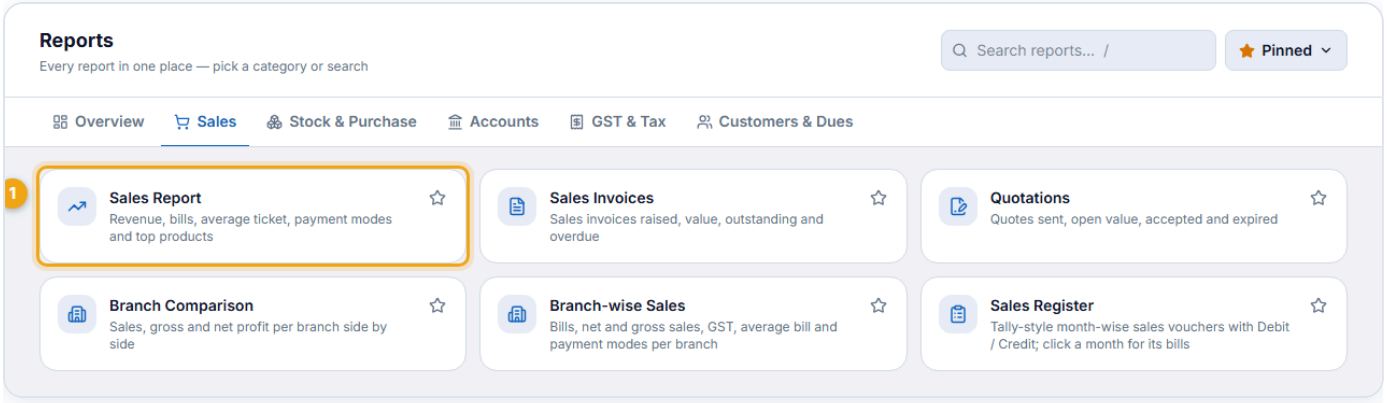

Figure Sales reports

The **Sales Report** (1) shows revenue, number of bills, average ticket and GST, a daily revenue chart, the split by payment mode and the top products. Other sales reports: Sales Invoices, Quotations, Branch Comparison, Branch-wise Sales and the Tally-style Sales Register.

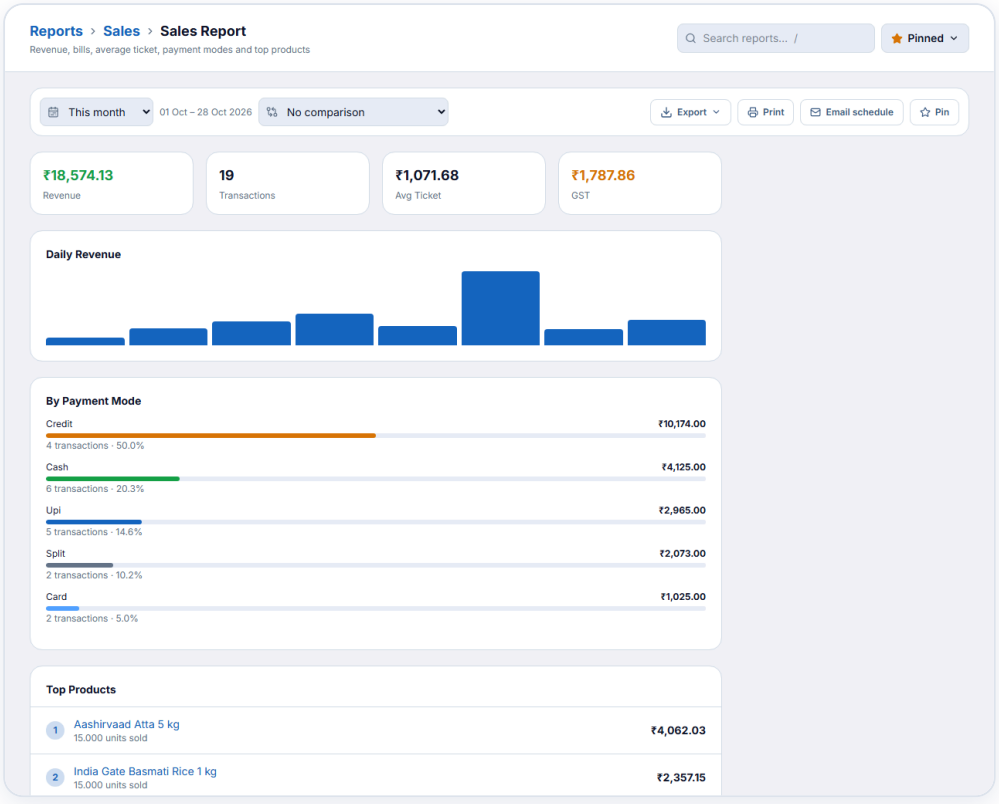

Figure Sales Report — October: ₹18,574.13 revenue, 19 bills

> **TIP**
> Use **Email schedule** on any report to receive it automatically every day, week or month.

Stock, accounts, GST and dues reports

The **Stock Summary** shows opening, inward, outward and closing quantity and value by category — click a category for its items, then an item for its month-wise movement.

Reports › Stock Summary

Opening, inward, outward and closing stock — click a category, an item, then a month

From 01-04-2026 To 28-10-2026 Branch All branches This FY

OPENING VALUE	INWARD VALUE	OUTWARD VALUE	CLOSING VALUE
₹1,13,148.36	₹55,464.91	₹21,745.49	₹1,46,867.78

All categories

01-04-2026 to 28-10-2026 · values at cost price · click a category for its items

Export

CATEGORY	OPENING		INWARD		OUTWARD		CLOSING	
	QTY	VALUE	QTY	VALUE	QTY	VALUE	QTY	VALUE
Beverages (5)		₹15,931.68		₹8,357.52		₹2,248.99		₹22,040.21
Dairy & Bakery (4)	96 pcs	₹9,907.24	70 pcs	₹5,739.30	11 pcs	₹858.22	155 pcs	₹14,788.32
Groceries & Staples (7)	434 pcs	₹39,799.64	219 pcs	₹20,040.78	67 pcs	₹8,456.48	586 pcs	₹51,383.94
Household & Cleaning (4)		₹10,186.40		₹2,903.43		₹703.39		₹12,386.44
Personal Care (4)		₹13,878.04		₹1,993.20		₹1,144.08		₹14,727.16
Snacks & Packaged Food (6)	360 pcs	₹17,456.16	96 pcs	₹12,641.28	89 pcs	₹7,336.13	367 pcs	₹22,761.31
Stationery (3)	114 pcs	₹5,989.20	72 pcs	₹3,789.40	19 pcs	₹998.20	167 pcs	₹8,780.40
Grand Total		₹1,13,148.36		₹55,464.91		₹21,745.49		₹1,46,867.78

Figure Stock Summary — closing value ₹1,46,867.78

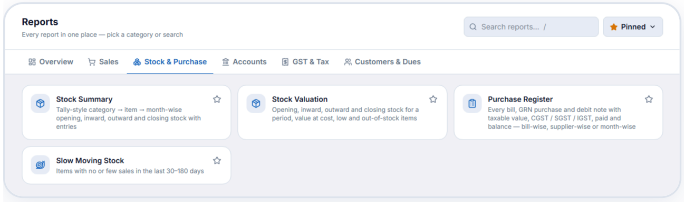

Figure Stock & Purchase reports

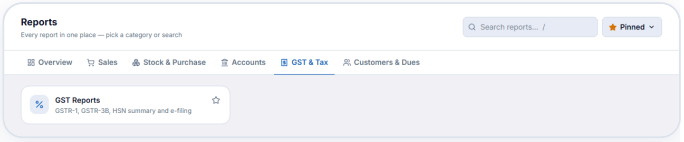

Figure GST & Tax reports

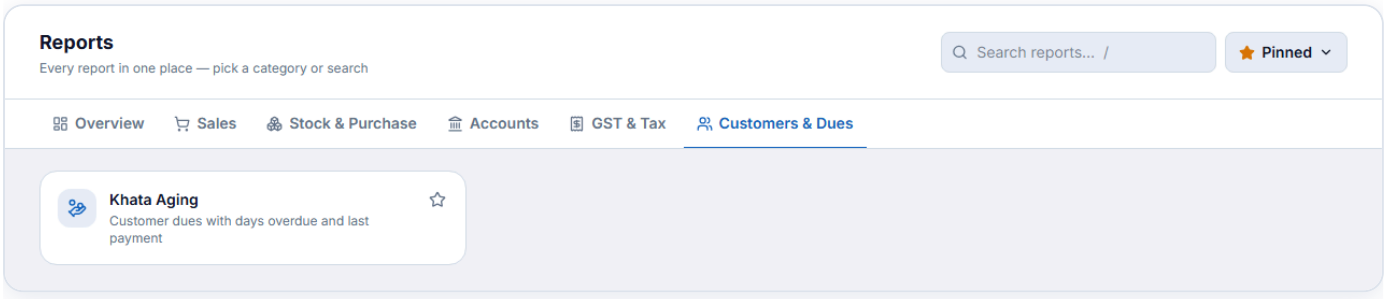

Figure Customers & Dues reports

CHAPTER 14

14 HR and Payroll Basics

Keep employee records, mark attendance, run monthly payroll and manage leave.

Jaldi samjhein (Hinglish quick start)

Staff ka record **HR & Payroll** mein: **Add Employee**, roz **Mark Attendance**, mahine ke end mein **Run Payroll** → salary slip. Leave request bhi yahin approve hoti hain.

HR dashboard

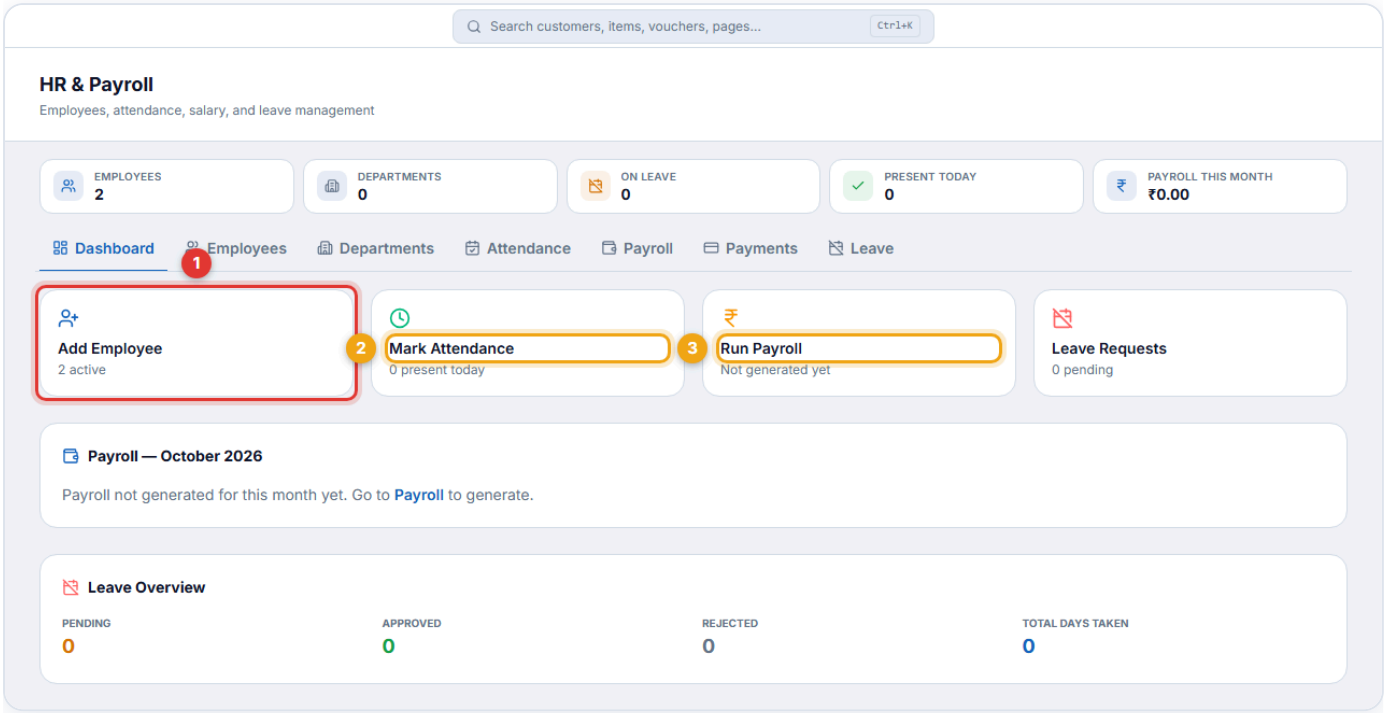

Figure HR & Payroll

The top shows employees, departments, staff on leave, present today and this month's payroll. Tabs: Dashboard, Employees, Departments, Attendance, Payroll, Payments and Leave. Quick cards: **Add Employee** (1), **Mark Attendance** (2), **Run Payroll** (3) and Leave Requests.

Employees

1. Open the **Employees** tab and click **Add Employee**.
2. Enter name, email, phone, designation, employment type (full time, part time, contract, intern), joining date, salary and branch. PAN, Aadhaar and bank details are optional.
3. Save. The employee gets an **Advance** and **Statement** button for salary advances and their ledger.

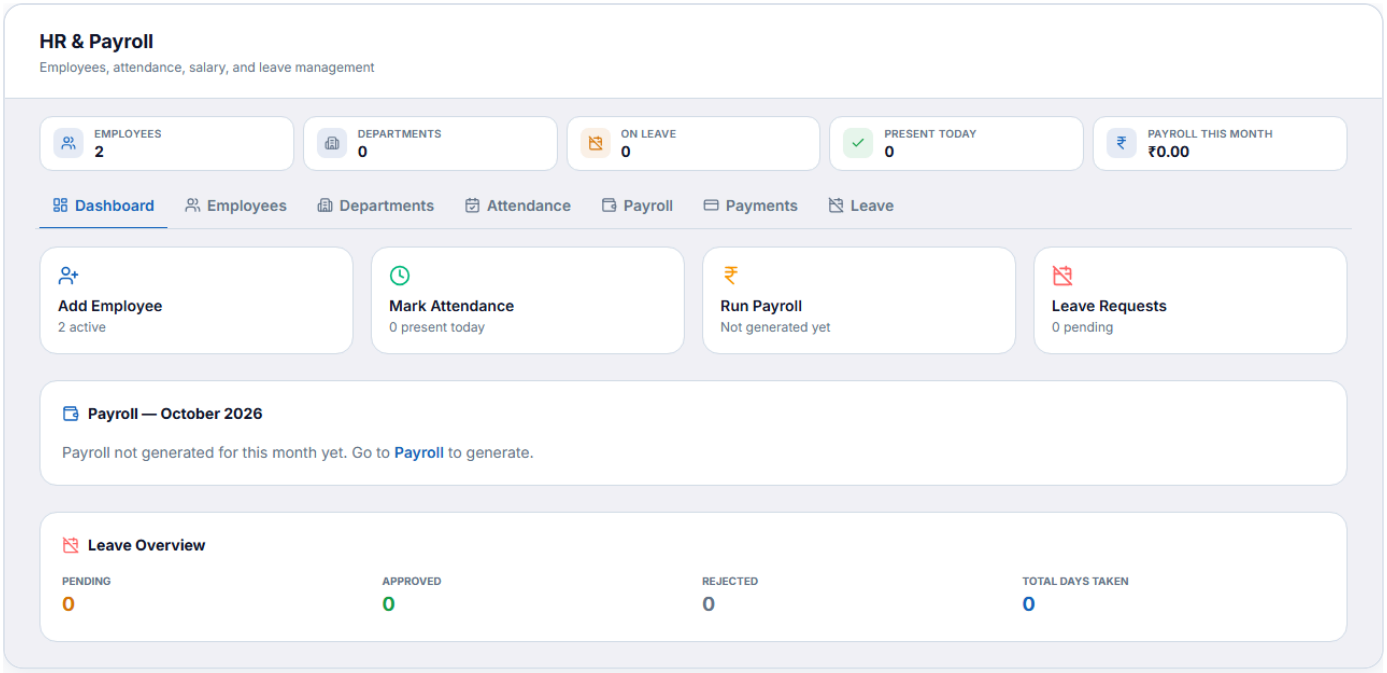

Figure Employees — Pooja Sharma (Store Supervisor) and Ramesh Kumawat (Sales Associate)

> **NOTE**
> Adding an employee also creates a login for them with a temporary password, so the email must not be used by any other CoreAxis account.

Attendance, payroll and leave

1. **Attendance** — choose the date, the employee and the status (present, absent, half day, leave) and click **Mark**. **Monthly Track** shows the whole month; **Selfie Attendance Rules** let staff check in from their phone.
2. **Payroll** — pick the month and click **Generate Payroll**. Salaries are worked out from attendance and leave; review, then pay from the **Payments** tab.
3. **Leave** — approve or reject leave requests and see days taken.

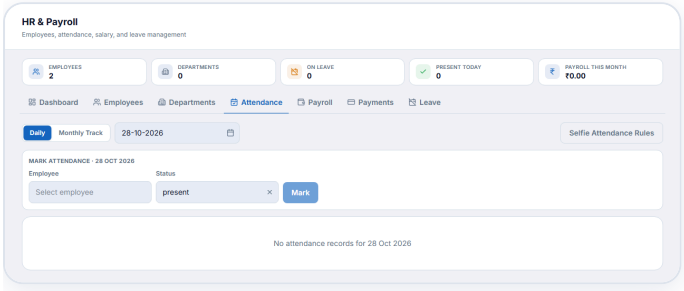

Figure Mark attendance

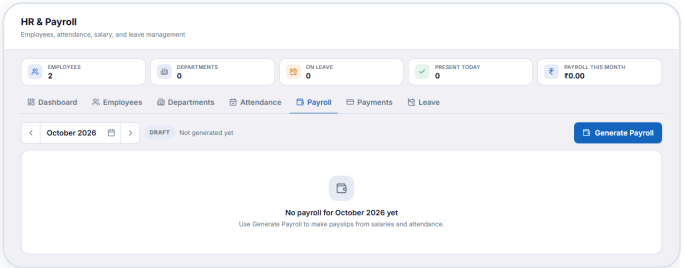

Figure Generate payroll for October 2026

CHAPTER 15

15 Mobile and Desktop Apps

CoreAxis ePOS 3.0 for Android puts billing, khata, stock and reports on your phone. It works with the same login and data as the web.

Jaldi samjhein (Hinglish quick start)

Play Store se **CoreAxis ePOS** install kijiye, same email-password se login. Phone par bill, khata, stock aur reports. Internet na ho to bhi bill banta hai — net aate hi sync.

Install and sign in

1. Install **CoreAxis ePOS** from the Google Play Store.
2. Open the app and sign in with the same email and password as the web.
3. Choose who is billing and enter your PIN on shared counter phones.
4. Allow camera access if you want to scan barcodes with the phone camera.

NOTE

The Windows desktop app is available from **coreaxis.cloud** (Download page). It has the same screens as the web, with direct printing to thermal and A4 printers and offline billing.

What you can do on the phone

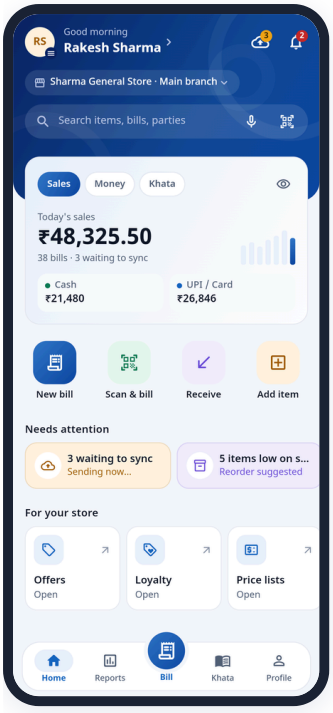

Figure Home — today's sales, cash and UPI, quick actions

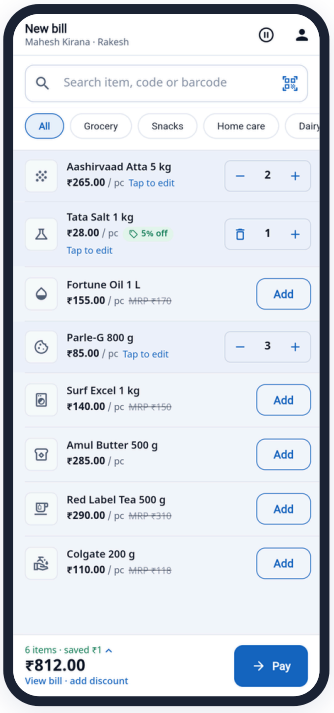

Figure New bill — search, scan, change rate, discount

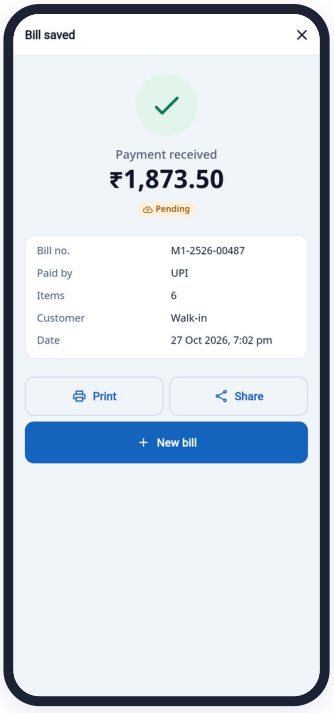

Figure Payment received — print or share

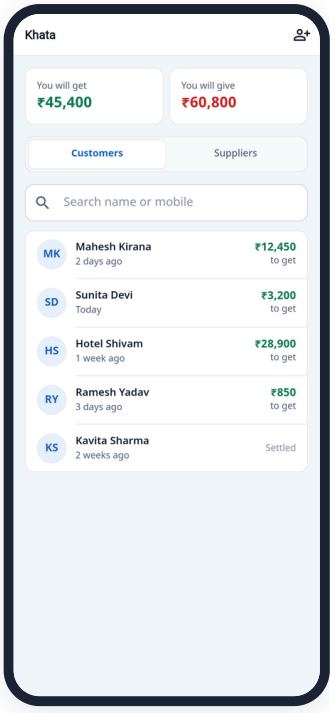

Figure Khata — you will get / you will give

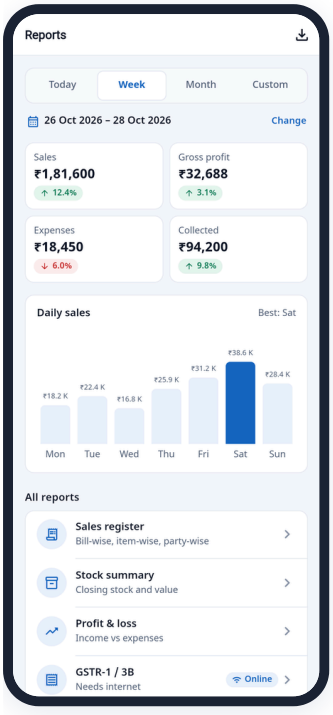

Figure Reports — sales, profit, expenses, GST

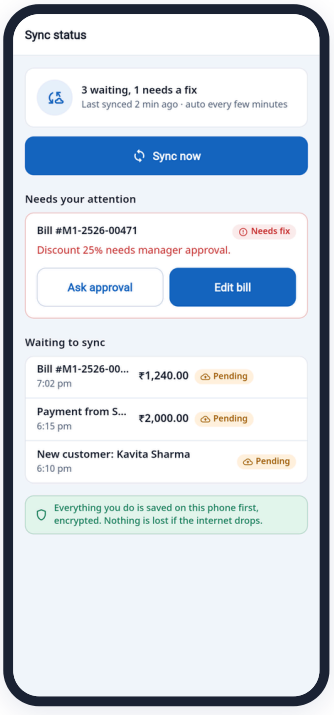

Figure Sync status — works without internet

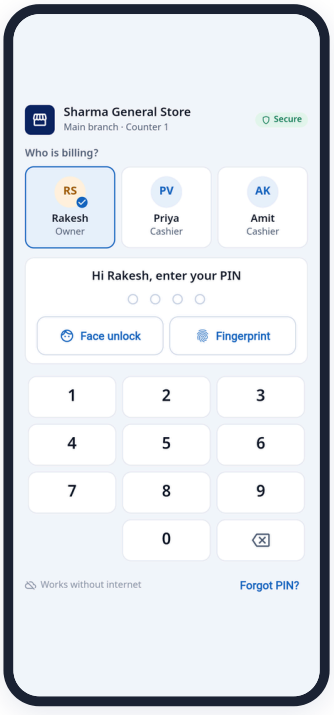

Figure Who is billing? PIN, face or fingerprint

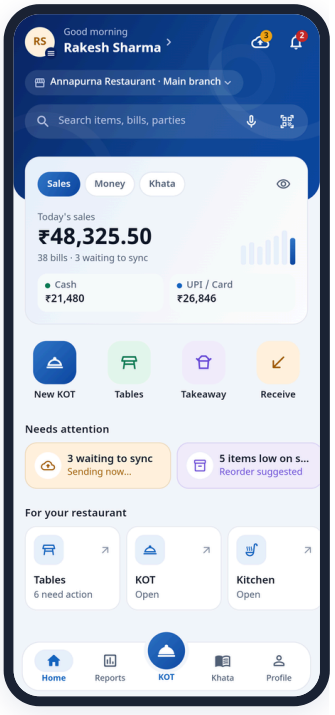

Figure Restaurant mode — KOT, tables, takeaway

- Fast billing from your item list, search or camera barcode scan; change rate, item and bill discount.
- Cash, UPI, card or khata; hold a bill and resume it later.
- Print on Bluetooth or Wi-Fi thermal printers (58 / 80 mm) or share a PDF invoice on WhatsApp.

- Customer and supplier balances; record payments received and paid.
- Everything is saved on the phone first and syncs on its own when you are back online.

> **NOTE**
> The phone screens shown come from the app’s sample data, so the shop and customer names differ from the rest of this manual.

CHAPTER 16

16 FMCG Distribution

For FMCG distributors, stockists and wholesalers: salesmen on beats, order booking, loading sheets, trade schemes, credit control, market returns, van sales and company reports. Everything is under **Distribution** in the sidebar.

Jaldi samjhein (Hinglish quick start)

Distributor / stockist ke liye: salesman, beat (route), outlet, order booking, loading sheet, scheme, udhaar control, market return, van sale aur company reports — sab **Distribution** menu mein.

Set up salesmen, beats and outlets

1. **Settings** → **Users**: add a login with the **Salesman** role (it takes one staff seat).
2. **Distribution** → **Salesmen**: **Add salesman** and link that login. A salesman sees only their own beats, outlets, orders and collections.
3. **Distribution** → **Beats**: **Add beat**, pick the salesman and the visit days (for example Mon and Thu).
4. **Distribution** → **Outlets**: add each shop with class (A/B/C), type and GPS (**Use my current location**), and pick its beat.
5. On a beat, press **Outlets** to set the visit order with the arrows, then **Save order**.

i **NOTE**

An outlet is an ordinary customer: it has its own ledger, khata and bills. One outlet sits on one beat.

i **NOTE**

The Distribution screens in this chapter come from a sample pharma distributor, “Shree Balaji Pharma Distributors”, Patna, so the business name differs from the rest of this manual.

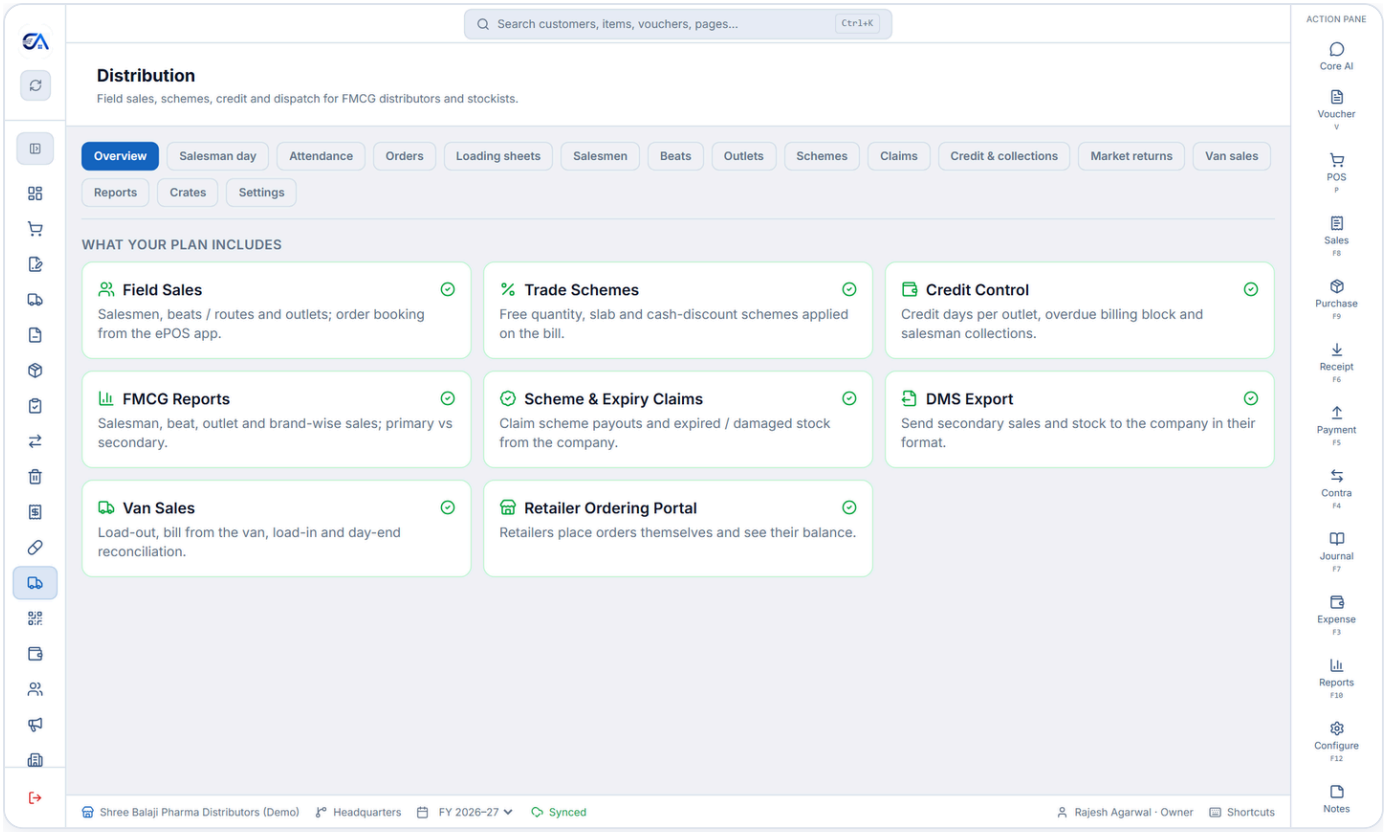

Figure Distribution → Overview — the modules in your plan and a tab for each part of the work

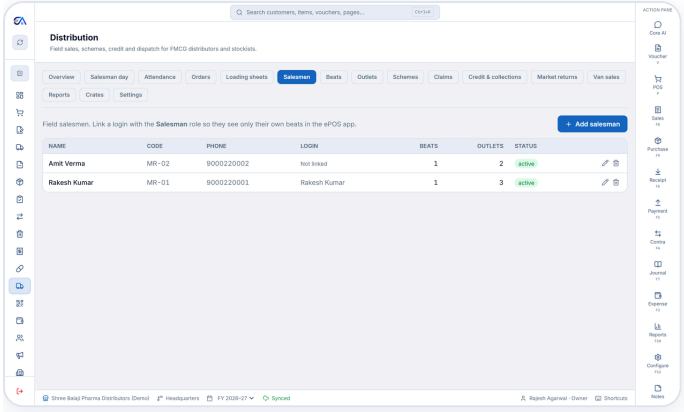

Figure Salesmen — one with an app login

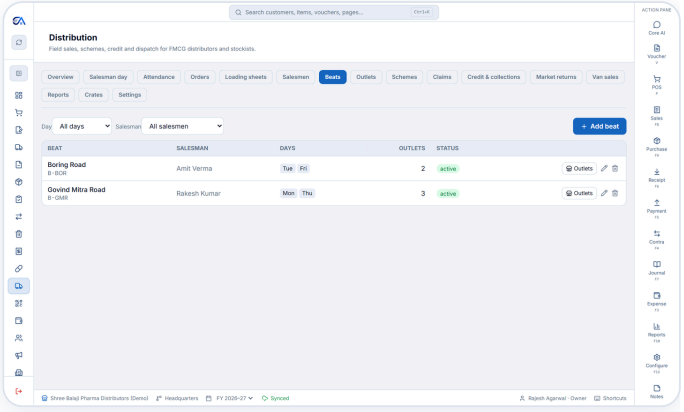

Figure Beats with their visit days

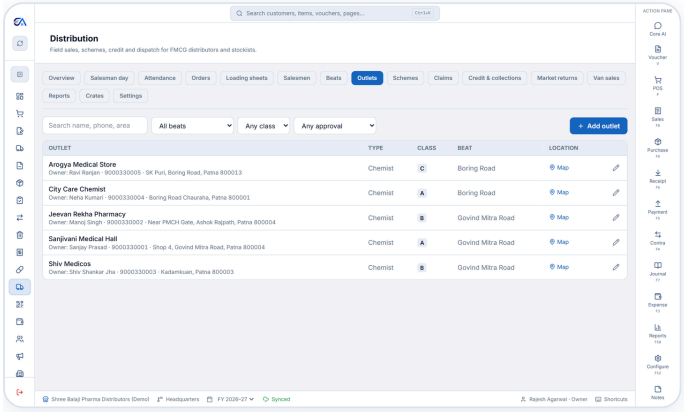

Figure Outlets on their beats

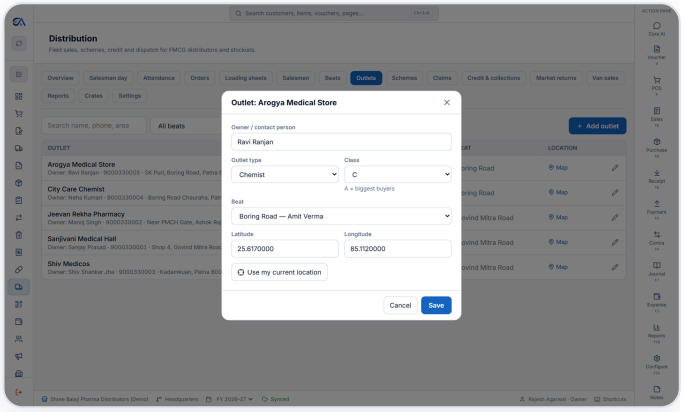

Figure Outlet — type, class, beat and GPS

Orders, loading sheet and billing

1. The salesman books orders in the ePOS app (Salesman mode), or the office uses **Orders** → **New order**. Schemes and the outlet's group price apply by themselves.
2. Office: open the order and press **Confirm**.
3. Tick the orders for one van and press **Loading sheet**; enter vehicle and driver. **Print** gives the product-wise load and the delivery list.
4. Press **Bill** (or **Bill on credit** on one order). Each order becomes a normal sale — stock, batches, GST and the outlet's account update.
5. On the loading sheet press **Dispatch**, and **Delivered** when the van is back.

TIP
After a sheet is dispatched its orders cannot be changed. Use a market return for goods that come back.

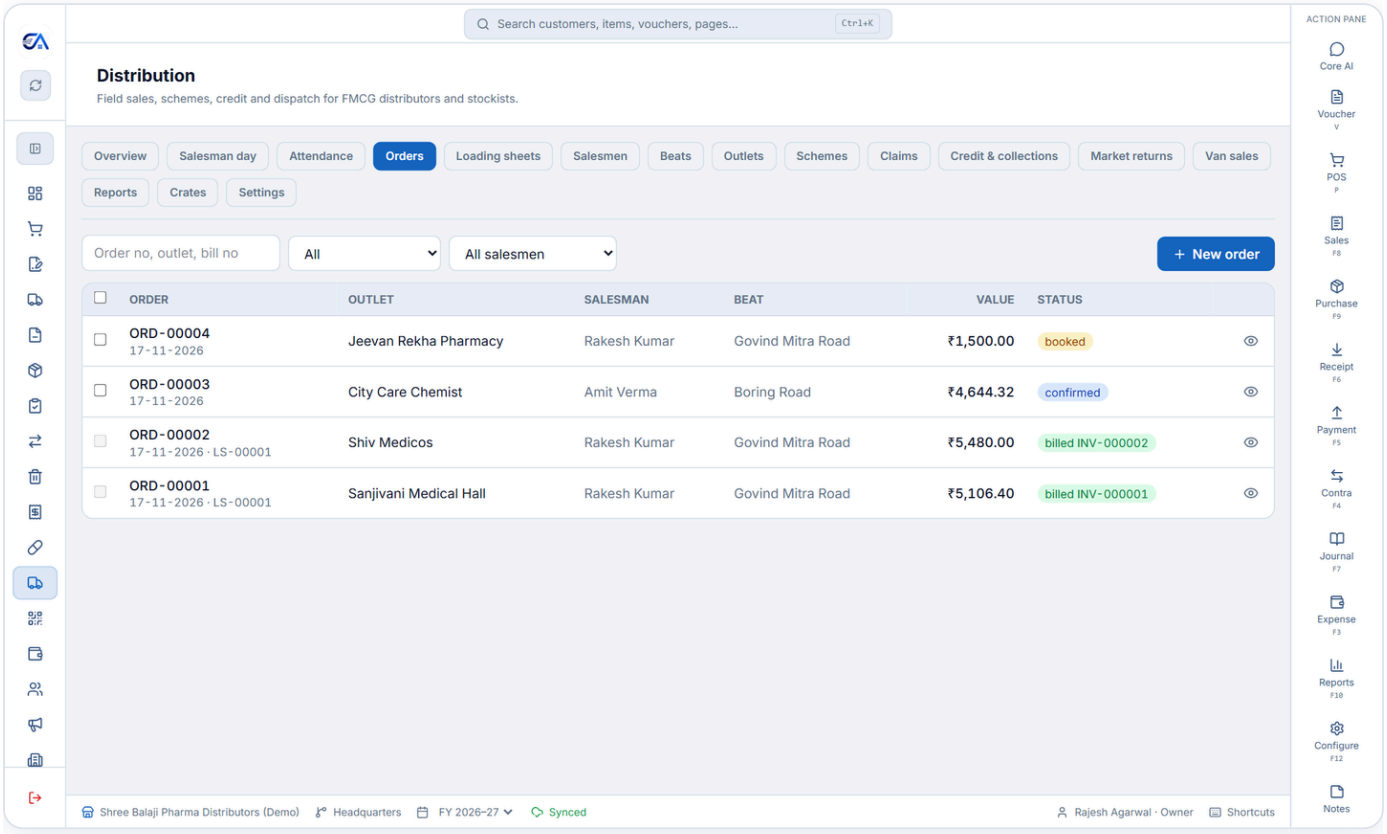

Figure Orders — booked, confirmed and billed, with outlet, salesman and beat

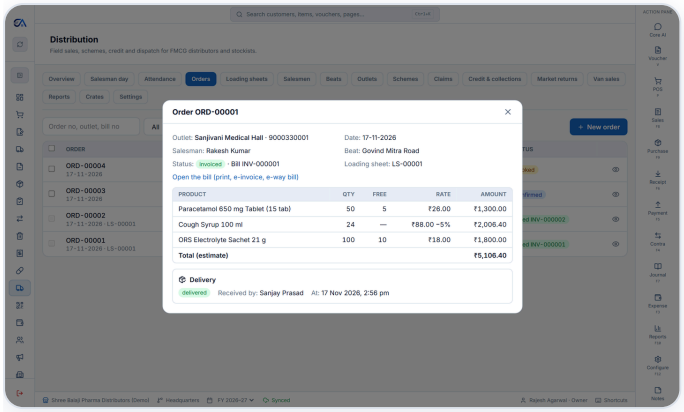

Figure An order — scheme free goods added by themselves

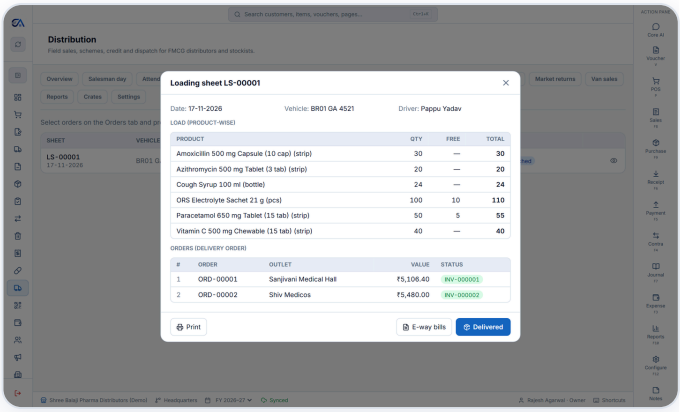

Figure Loading sheet — product-wise load and its bills

Trade schemes and claims

Scheme	Example
Free quantity	Buy 10, get 1 free (same or another product)
Quantity slab	5+ pieces 2% off, 20+ pieces 5% off
Order value	3% off Brand X when the order of Brand X reaches ₹10,000

1. **Distribution → Schemes → New scheme**: pick the type, the products or brands, dates and (optional) outlet classes.
2. Pick the company that funds the scheme to claim it back.
3. **Distribution → Claims → Scheme claim**: pick the period; it lists free goods (at cost) and scheme discounts on billed orders not claimed yet.
4. Mark the claim **Submitted**, then **Settled** with the amount the company passed and its credit note number.

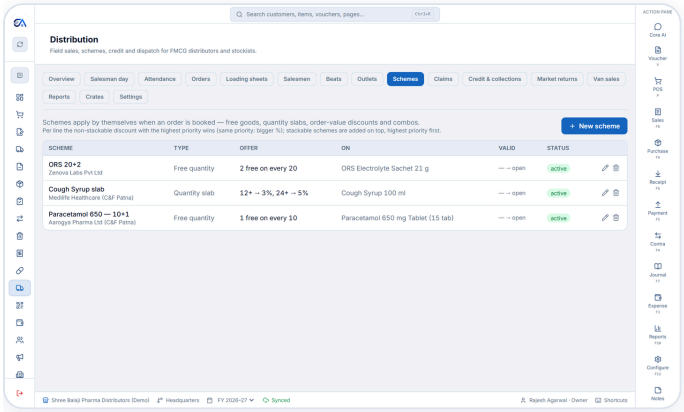

Figure Schemes, each funded by its company

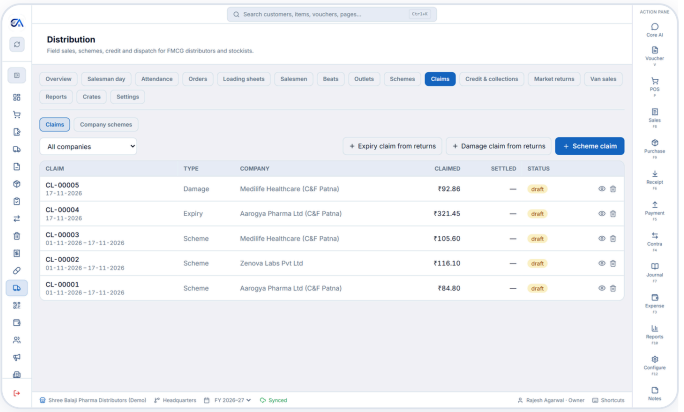

Figure Claims — scheme, expiry and damage, one per company

Credit days, overdue block and collections

1. **Distribution** → **Credit & collections**: set the default credit days, or per outlet with the pencil (with a credit limit).
2. An outlet whose bills are older than its credit days is **overdue**: new orders and bills stop until it pays. The office can override.
3. The salesman records a **collection** (cash, UPI or cheque).
4. Office: **Collections** → **Accept** books the receipt and settles the oldest bills first; anything extra goes on account.

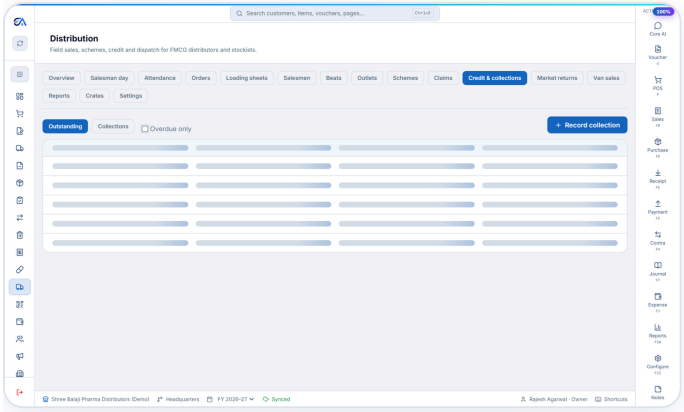

Figure Outstanding, overdue and terms per outlet

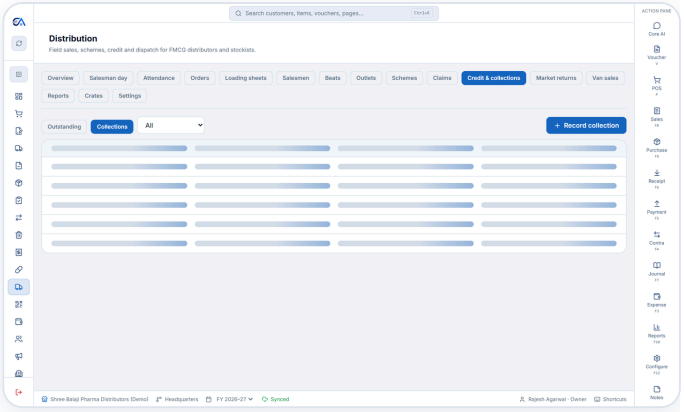

Figure Collections waiting for the office

Day close, cheques and budgets

- **Day close (DSR)**: on **Salesman day**, pick the salesman to see planned vs visited outlets, orders, collections and the cash to hand over; enter the cash received and press **Close day** — any short or excess is kept.
- **Cheques**: a post-dated cheque can be accepted only on or after its date. If an accepted cheque bounces, press **Bounced**: its receipts are reversed, the bills are open again and bank charges go on the outlet's account.
- **Scheme budget**: give a scheme a total of free units or discount ₹; it stops applying once used up.
- **Claim settled**: the amount the company passes is booked to its account automatically.

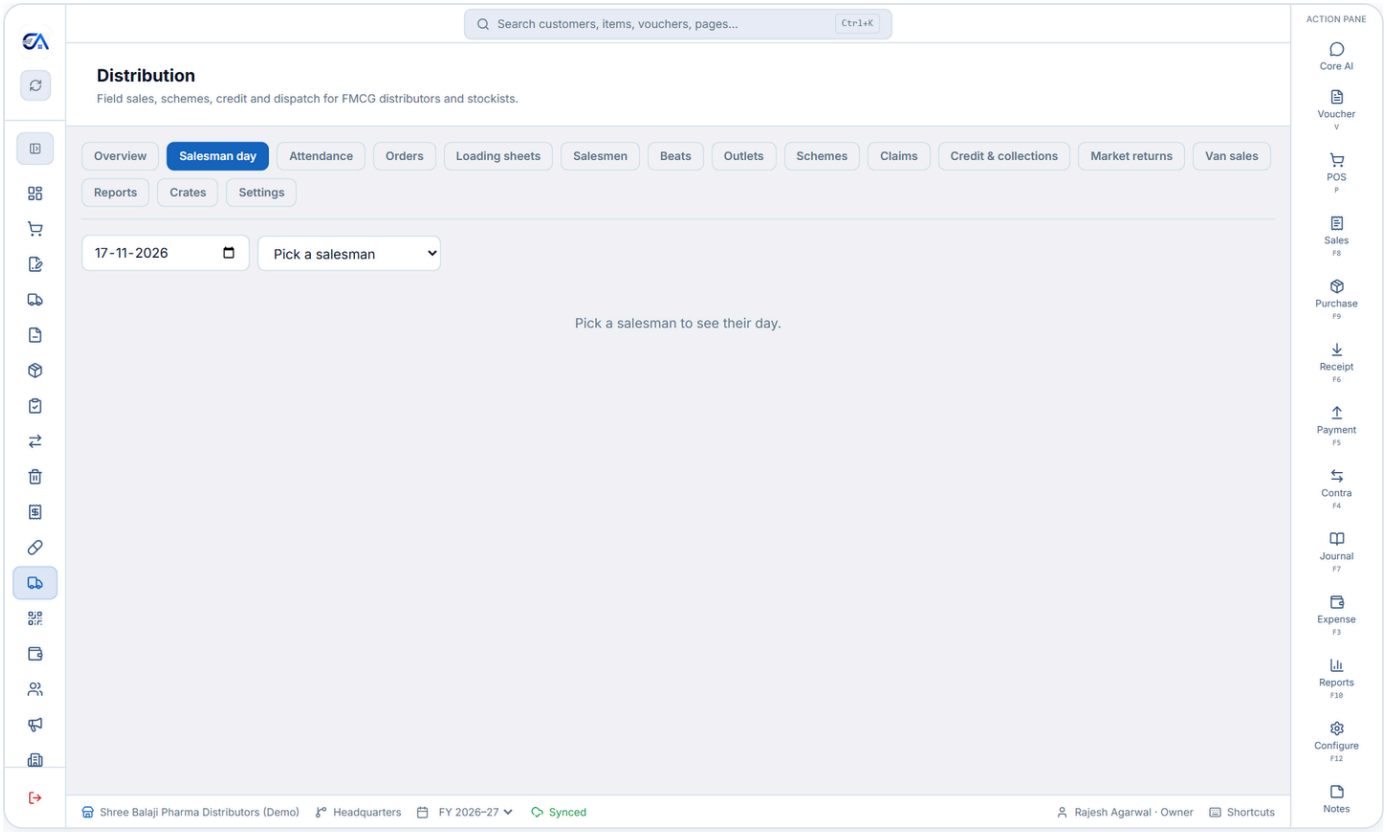

Figure Salesman day — visits, orders and collections, and the day close

Market returns, van sales and crates

- **Market returns**: pick the bill, enter the return quantity and condition. **Saleable** goes back to stock; **damaged / expired** is written off and can be claimed from the company (Claims → Expiry claim from returns).
- **Van sales** (paid add-on): **Load van** for a salesman, the salesman bills outlets from the van, then **Load in & close** with what came back and the cash handed over — the trip shows any stock or cash short.
- **Crates**: record crates, shells or bottles given to and taken back from each outlet; the list shows what each outlet still holds.

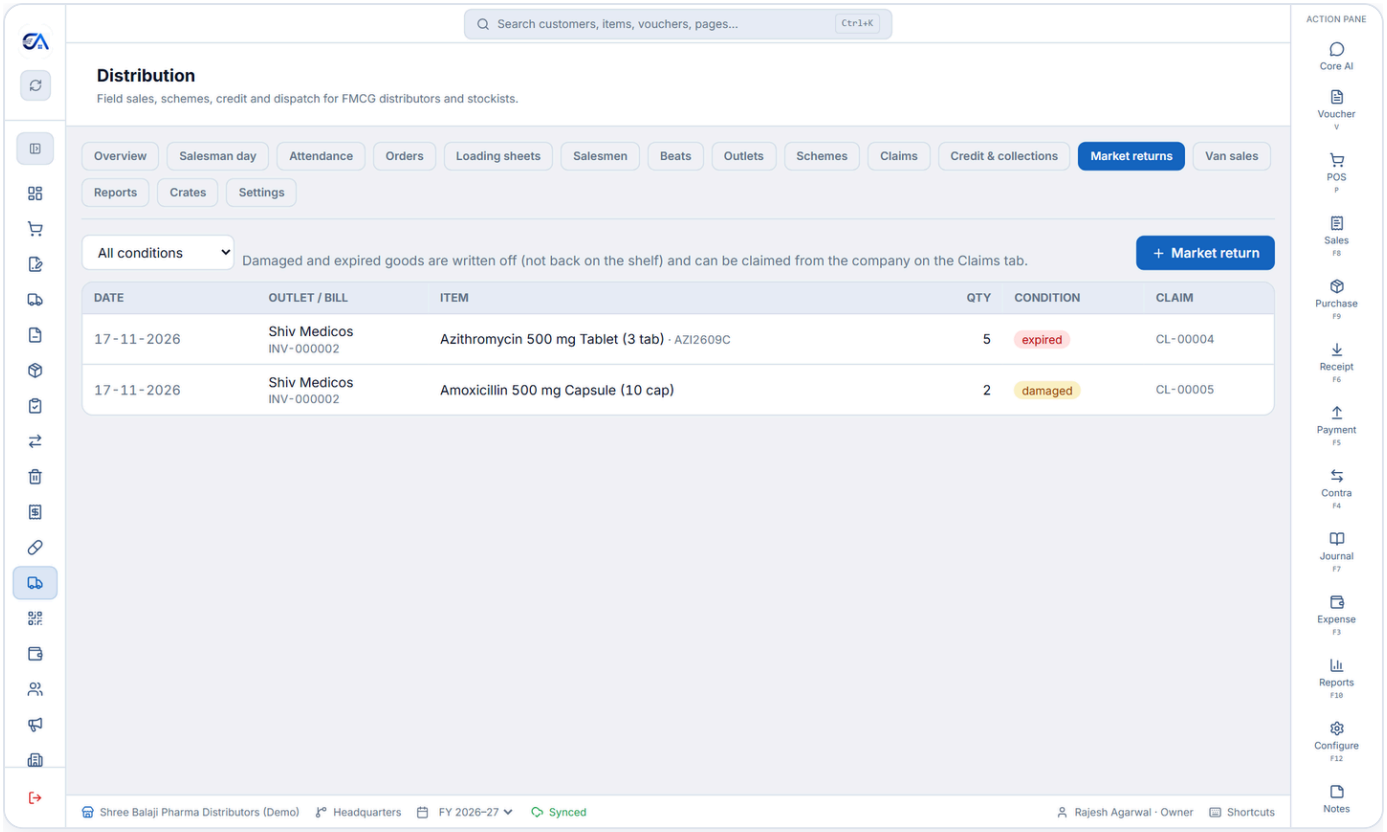

Figure Market returns — expired and damaged goods from outlets

Reports, targets and DMS export

- **Sales** by salesman, beat, outlet, brand, company or SKU, with margin and net of returns.
- **Primary vs secondary**: what you bought from the company against what you sold to outlets, with sell-through %.
- **Schemes**: free goods and discounts given per scheme. **Salesman productivity**: calls, strike rate, lines per order, drop size.
- **Targets**: a monthly sales target and incentive % per salesman; achievement is sales before GST, net of returns.
- **DMS export**: CSV files of secondary sales, closing stock and outlets to upload to the company's DMS.

> **NOTE**
> Reports with cost and margin are shown only to roles with Finance or Reports access; the DMS export needs the Export right on Distribution.

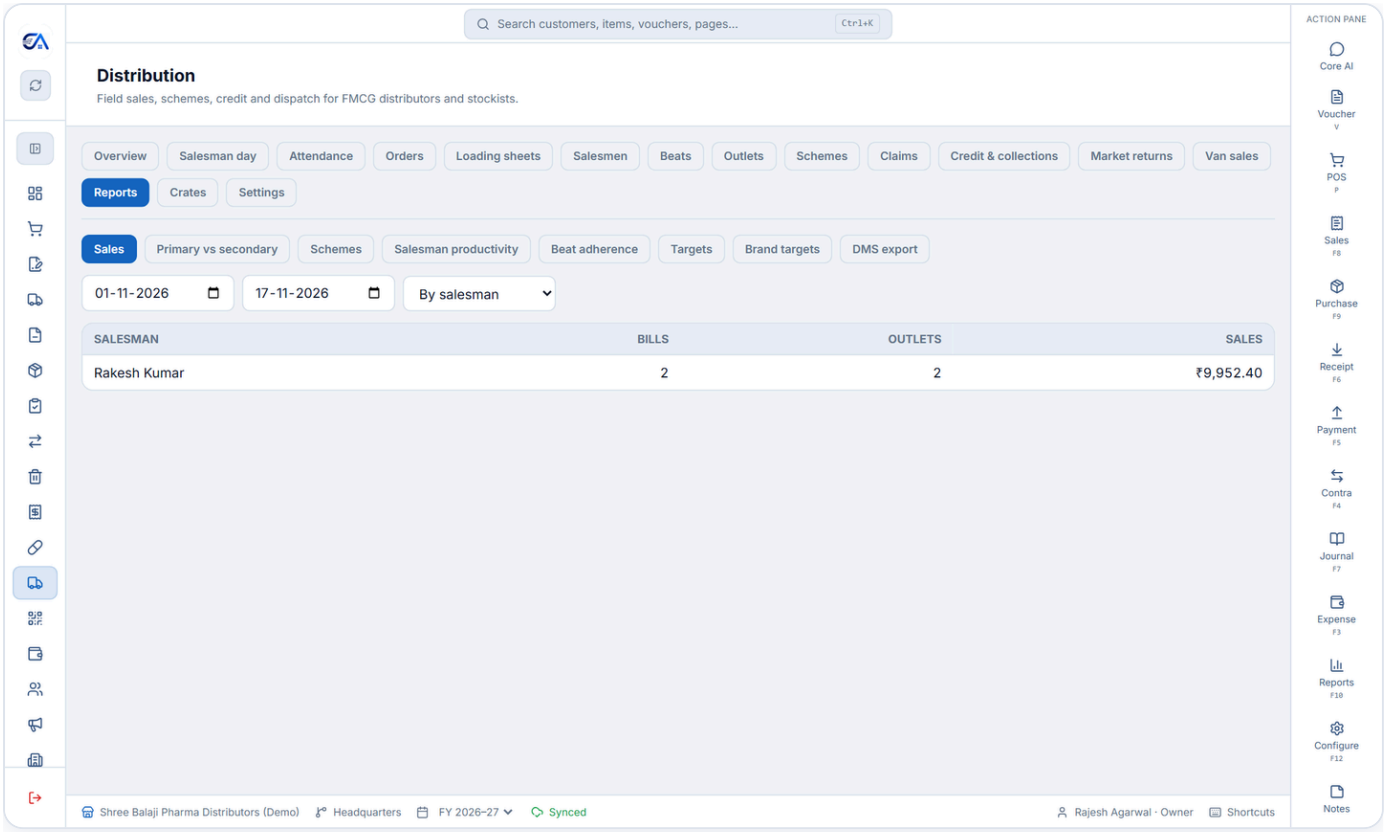

Figure Distribution reports

Settings: credit limit, check-in radius, approval and attendance

- **Distribution → Settings** (office). **Credit limit at booking**: **Off**, **Warn** (book it and show a warning) or **Block** (refuse; the office can override). It counts unpaid bills, orders not billed yet and the new order.
- **Check-in radius**: a salesman can check in only within this many metres of the outlet's saved location (the phone's GPS accuracy is allowed for).
- **Outlet approval**: shops a salesman adds wait in **Outlets → Pending approval**; they can take orders but can't be billed until you press **Approve**.
- **Attendance**: the salesman presses **Start day** (and **End day**) in the app; orders, visits and collections need a started day. **Distribution → Attendance** shows each salesman's start, end, hours and location.

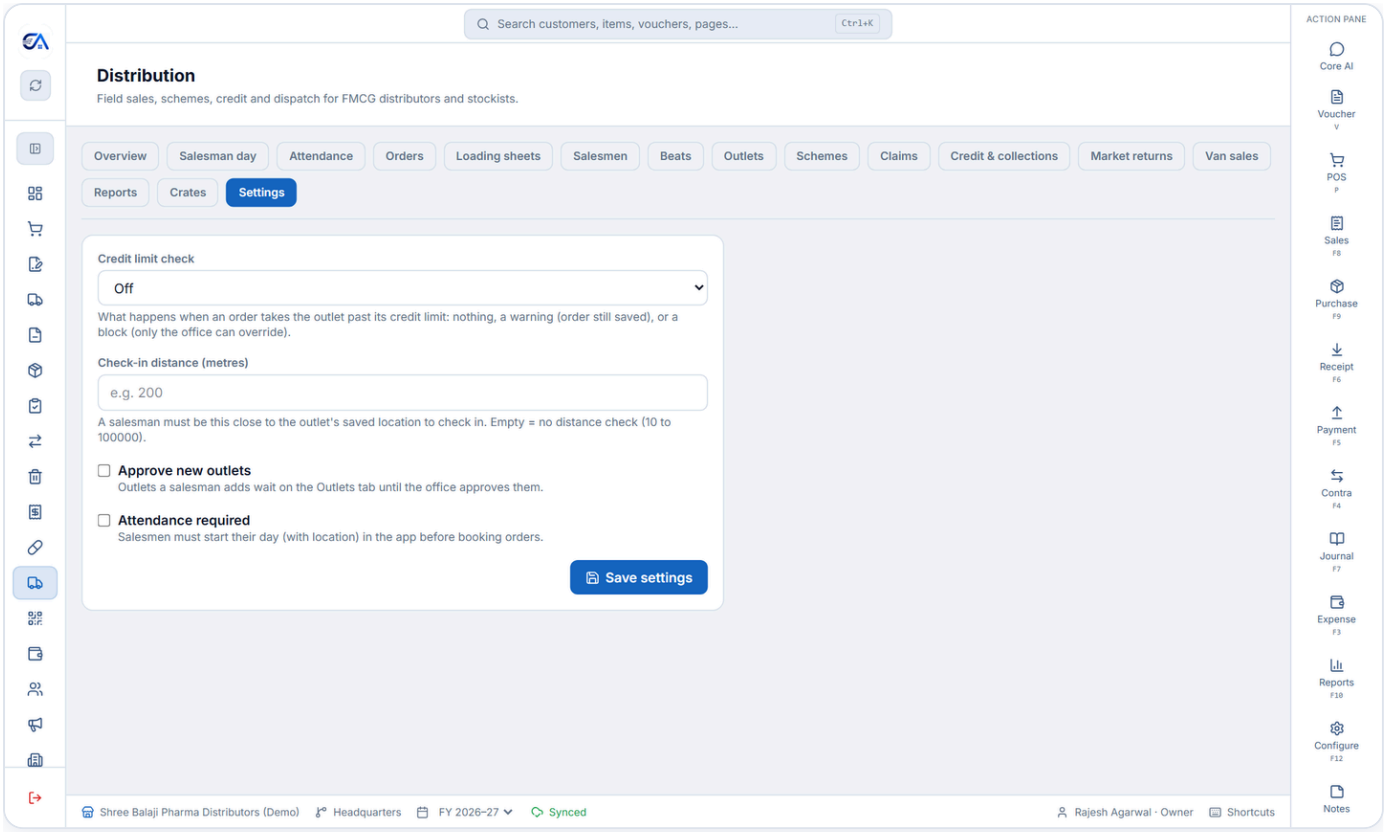

Figure Distribution settings

Delivery, proof of delivery and short supply

1. Open a billed order and press **Record delivery**.
2. Enter what was delivered of each product (it starts at what was sent). For anything short, pick the condition and the reason.
3. Enter who received it, add a photo and let them sign on the screen; press **Save**.
4. Short or refused goods are booked back as a return against the bill. If the delivery was recorded from the app, press **Book short return** on the order.

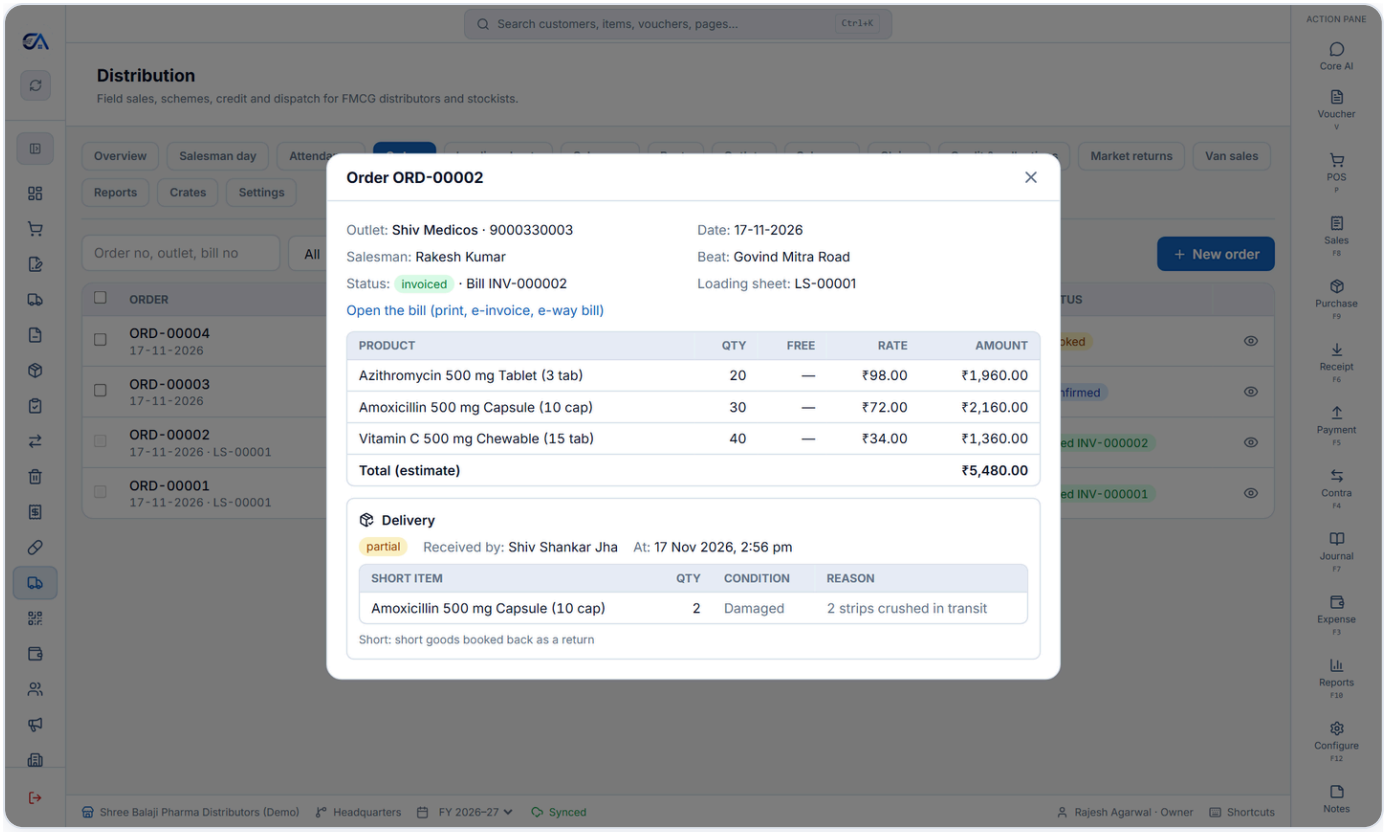

Figure A partial delivery — the short item came back as a damaged return

Van stock, e-way bills and company schemes

- **Van stock**: when loading a van, pick **Load from godown**. Each salesman's van is its own godown ("Van – name"): loading moves stock into it, bills take it out and **Load in & close** moves what came back to the godown.
- **E-way bills**: on a loading sheet press **E-way bills**, check the vehicle and distance and press **Make**. Each billed order gets an e-way bill (bills under the limit are skipped unless you tick the box). Enter the PIN code where the outlet's address has none.
- **Company schemes** (Claims → Company schemes): the company's purchase target for a period, e.g. buy ₹10 lakh this quarter for a 2% rebate. The progress bar follows your purchase bills from that company; press **Claim rebate** once it is earned.
- **Combo and stacked schemes**: a **Combo** gives a discount or free goods when a set of products is bought together. Every scheme has a **Priority** (higher wins) and can be **Stackable** (added on top of the best one). The bill shows each scheme it used.
- **Schemes at the counter**: with Trade Schemes on, the POS shows the scheme discount and free goods on the bill and saves them with it.
- **Returns**: one product can be split across conditions (e.g. 2 saleable, 1 damaged) with **+ split**.

APPENDIX A

A FAQ and Troubleshooting

Answers to the questions owners and staff ask most often.

▼ I did not receive the OTP email.

Check the spam / promotions folder and wait one minute. Use **Resend code** on the OTP screen. Make sure the email address is typed correctly. If it still does not arrive, contact support.

▼ It says “Active Session Found” when I sign in.

Your account is already open on another device. Click **Continue Here** to sign in here and sign out the other device, or **Cancel** to keep using the other one.

▼ I forgot my password.

On the sign-in page click **Forgot password?**, enter your email, type the code you receive and set a new password. Staff can also ask the owner to reset it from **Settings** → **Team**.

▼ An item does not show in the POS.

Check that the item is active, that its category is under **Product** (not a raw-material or internal category), and that it has stock — or allow negative stock in **Settings** → **Inventory**.

▼ The bill shows IGST instead of CGST + SGST.

The customer's GSTIN or place of supply is in another state. For a local customer, correct their GSTIN / state in **Customers**, then create the bill again.

▼ “Insufficient balance” when paying a supplier or recording an expense.

Cash and bank accounts cannot go below zero. Record the day's cash sales or receipts first, move money with a **Contra** entry, or pay from another account.

▼ The credit sale is blocked by the credit limit.

The customer's outstanding plus this bill is above their limit. Collect a payment first, raise the limit in the customer's profile, or (owner / admin) approve the override when asked.

▼ I made a mistake in a bill.

Open it from **Sales**. If your role allows, edit it; otherwise cancel it and make a new one, or return the wrong items. Every change is kept in the **Edit Log**.

▼ The internet is down.

Keep billing. Sales are saved on the device and sync automatically when the connection returns. The status bar shows **Synced** when everything has reached the server.

▼ A staff member can see screens they should not.

Open **Settings** → **Staff Access** (which screens a role sees) and **Settings** → **Role Permissions** (what a role can create, edit, delete or export), and adjust their role.

▼ How do I take a backup?

Your data is backed up on the server automatically. For your own copy use **Settings** → **Backup & Restore** or **Export all data** on the Settings page.

▼ Numbers in a report look wrong.

Check the date range and the financial year in the status bar, and the branch selected. Reports show only the period, FY and branch you have chosen.

APPENDIX B

Keyboard Shortcuts

Work faster at the counter and in the back office.

Key	What it does
Ctrl + K	Search anything — customers, items, vouchers, pages — or create something new
Ctrl + B	Collapse or expand the left sidebar
?	Show the shortcuts help on the current screen
g then d / p / i / s	Go to Dashboard / POS / Inventory / Sales (press g, then the letter)
g then c / f / g / r / x	Go to Customers / Finance / GST / Reports / Settings
F3	Expense voucher (outside POS)
F4	Contra voucher — cash to bank, bank to cash (outside POS)
F5	Payment voucher (outside POS)
F6	Receipt voucher
F7	Journal voucher
F8	Sale / POS (outside POS)
F9	Purchase
F10	Reports
F12	Settings / Configure
Alt + F1 / Alt + F2	Previous / next financial year
Ctrl + E	Export the current page (CSV / PDF)
Ctrl + P	Print the current page
Esc	Close a dialog or clear a search box
In the POS	
Enter (barcode box)	Add the scanned or typed item
F2	New sale — clear the bill
F3	Jump to customer (party) search
F4 or Ctrl + Enter	Checkout
F5	Hold (park) the current bill
F8	Print the last receipt again
Alt + 1 / 2 / 3 / 4	Payment mode Cash / UPI / Card / Credit

Key	What it does
Alt + C	Create a new customer from the name typed
↑ ↓, + / −, Del	Move between bill lines, change quantity, remove a line
In vouchers	
Ctrl + Enter	Save the voucher
Alt + N	New voucher (clear the form)
Alt + C	Create a party or ledger on the spot

APPENDIX C

Glossary

Business, GST and accounting words used in this manual, in plain language.

B2B / B2C	Business-to-business sale (the buyer has a GSTIN) / business-to-consumer sale (no GSTIN). They are reported separately in GSTR-1.
Branch	A shop, outlet or warehouse of the same business. Stock, bills and cash are kept per branch; reports can combine them.
CGST / SGST / IGST	GST split. Inside your own state the tax is half CGST + half SGST; to another state it is IGST. The software decides this from the GSTINs and the place of supply.
Contra	A voucher that only moves money between your own cash and bank accounts (for example depositing cash in the bank).
Credit note	A document that reduces what a customer owes you — for a return, a rate difference or a discount after the sale.
Debit note	A document that reduces what you owe a supplier — for example goods returned to them.
Delivery challan	A document that goes with goods that are not a sale yet — on approval, for job work or for a stock transfer.
Financial year (FY)	The accounting year, 1 April to 31 March in India. Bill numbers and reports follow the FY.
GSTIN	The 15-character GST number. The first two digits are the state code (08 = Rajasthan, 27 = Maharashtra).
GSTR-1 / GSTR-3B	Monthly or quarterly GST returns: GSTR-1 lists your sales, GSTR-3B is the summary with the tax you pay.
HSN / SAC	Codes that classify goods (HSN) and services (SAC) for GST. They print on invoices and in GSTR-1.
ITC (Input Tax Credit)	GST you paid on purchases and expenses, which you can set off against the GST you collect.
Khata / Credit sale	Selling now and collecting later. The amount goes to the customer's ledger as outstanding.
Ledger	The account page of one party or head (a customer, supplier, bank, expense) with every entry and the running balance.
MRP	Maximum Retail Price printed on the pack. The selling price cannot be higher.
Opening balance / stock	The amount owed or the quantity in hand on the day you start using the software.

Price level	A named price list (for example Wholesale) you can attach to customers so they automatically get their prices.
Purchase order (PO)	The order you place with a supplier. When the goods arrive you receive it, and stock and the supplier's ledger are updated.
Reorder level	The stock quantity at which an item shows as “low stock” so you buy more in time.
Receipt / Payment	Money received from a customer / money paid to a supplier or for an expense.
Role	A set of permissions (for example Cashier, Accountant). Each staff login gets a role that decides what they can see and do.
SKU	Stock-keeping unit — your own short code for an item, unique within your business.
Tax-inclusive price	A price that already includes GST. The software works backwards to find the taxable value and the tax.
Voucher	Any accounting entry: sale, purchase, receipt, payment, contra, journal or expense.
2FA (two-factor authentication)	A second check at sign-in — a code from an authenticator app — in addition to the password.

WE ARE HERE TO HELP

Support and Contact

Questions about your account, a plan, training for your staff or a problem on screen — reach us any way that suits you.

CoreAxis ePOS

GST-ready billing, offline-first POS and complete business management

WEBSITE
coreaxis.cloud

SIGN IN
coreaxis.cloud/app/login

CALL / WHATSAPP
+91 91131 07586

EMAIL
info@coreaxis.cloud

HELP CENTRE
coreaxis.cloud/help

SUPPORT HOURS
Mon – Sat, 9:00 AM – 5:00 PM IST

CREATE AN ACCOUNT
coreaxis.cloud/app/register

OFFICE
Samastipur, Bihar, India

All screenshots were taken from the CoreAxis ePOS web application using a sample business, “CoreAxis Demo Enterprises”, created for this manual. Names, phone numbers, GSTINs and amounts are examples only. Your screens may look slightly different depending on your version, plan, business type and the permissions of your role. GST rates and HSN codes shown are examples — confirm them with your tax adviser.