📘 Step-by-step guide

How to set up and use NexPos

Everything from creating your free trial to making your first sale, adding staff, running multiple branches, and reading your reports — with screenshots at every step.

IN THIS GUIDE

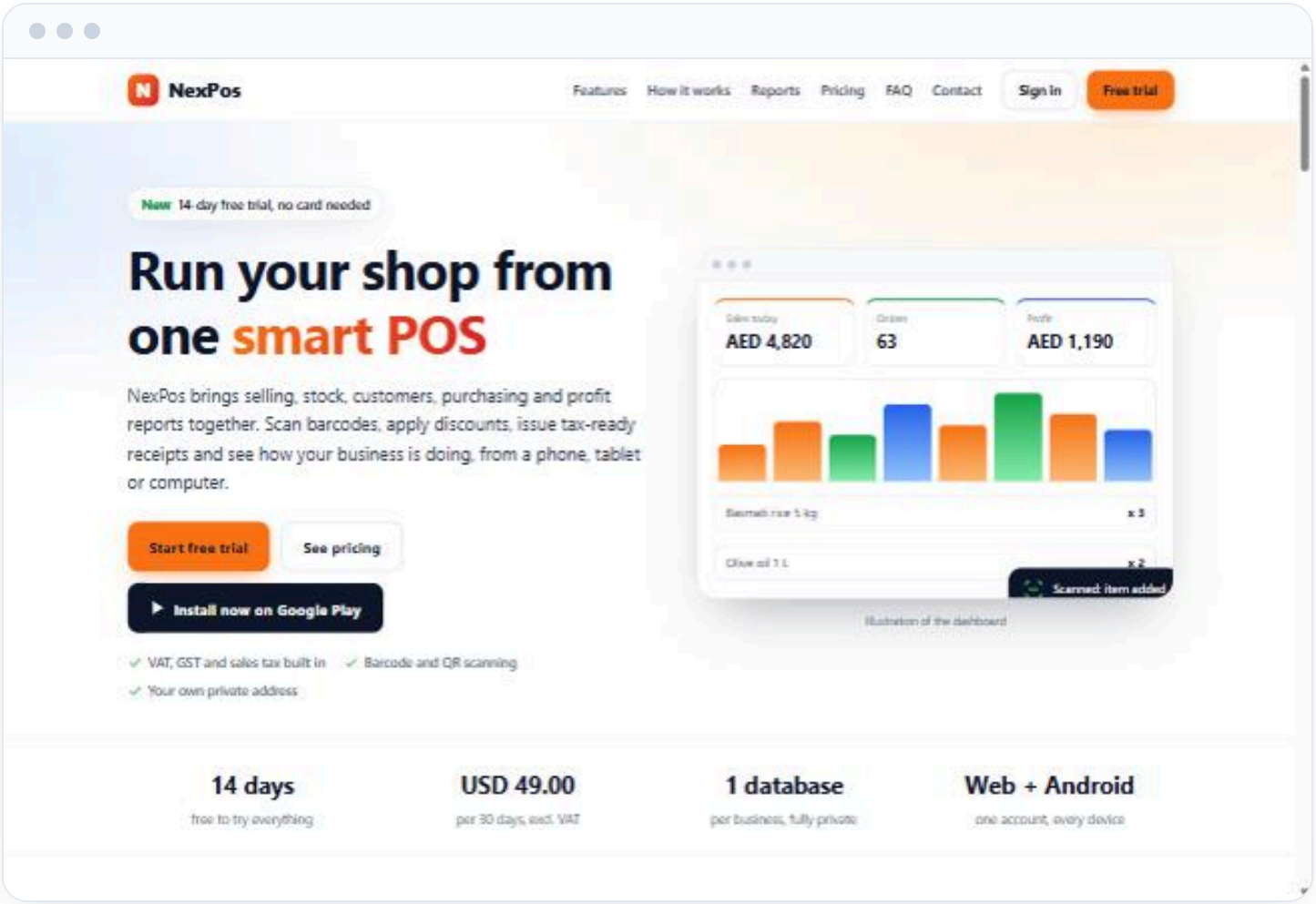
1. Create your free trial account
2. Sign in to your shop
3. Your dashboard at a glance
4. Add your products
5. Add your customers
6. Add staff and set their access
7. Make a sale at the till (POS)
8. Check your sales and reports
9. Set up more than one branch
10. Manage your subscription
11. Customise branding and receipts
12. Getting help

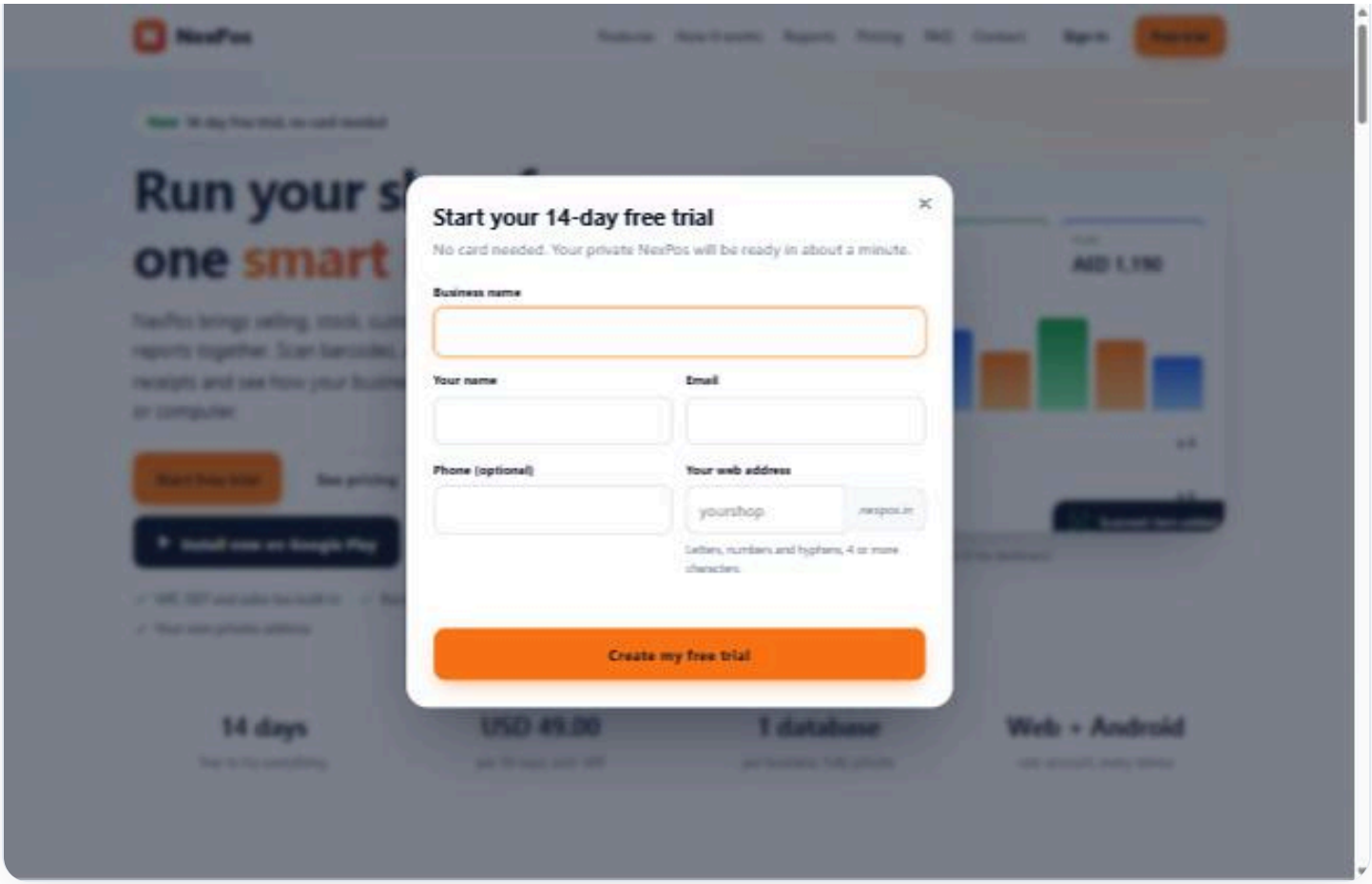
1

Create your free trial account

No card needed. Your private shop is ready in about a minute.

1. Go to **nexpos.in** and click **Start free trial** (top right, or in the hero section).
2. Fill in your business name, your name, email, phone (optional) and choose your shop's web address — this becomes `yourshop.nexpos.in`.
3. Click **Create my free trial**. You'll be asked to choose your own sign-in password.
4. Your trial runs for 14 days with every feature unlocked — no credit card required.





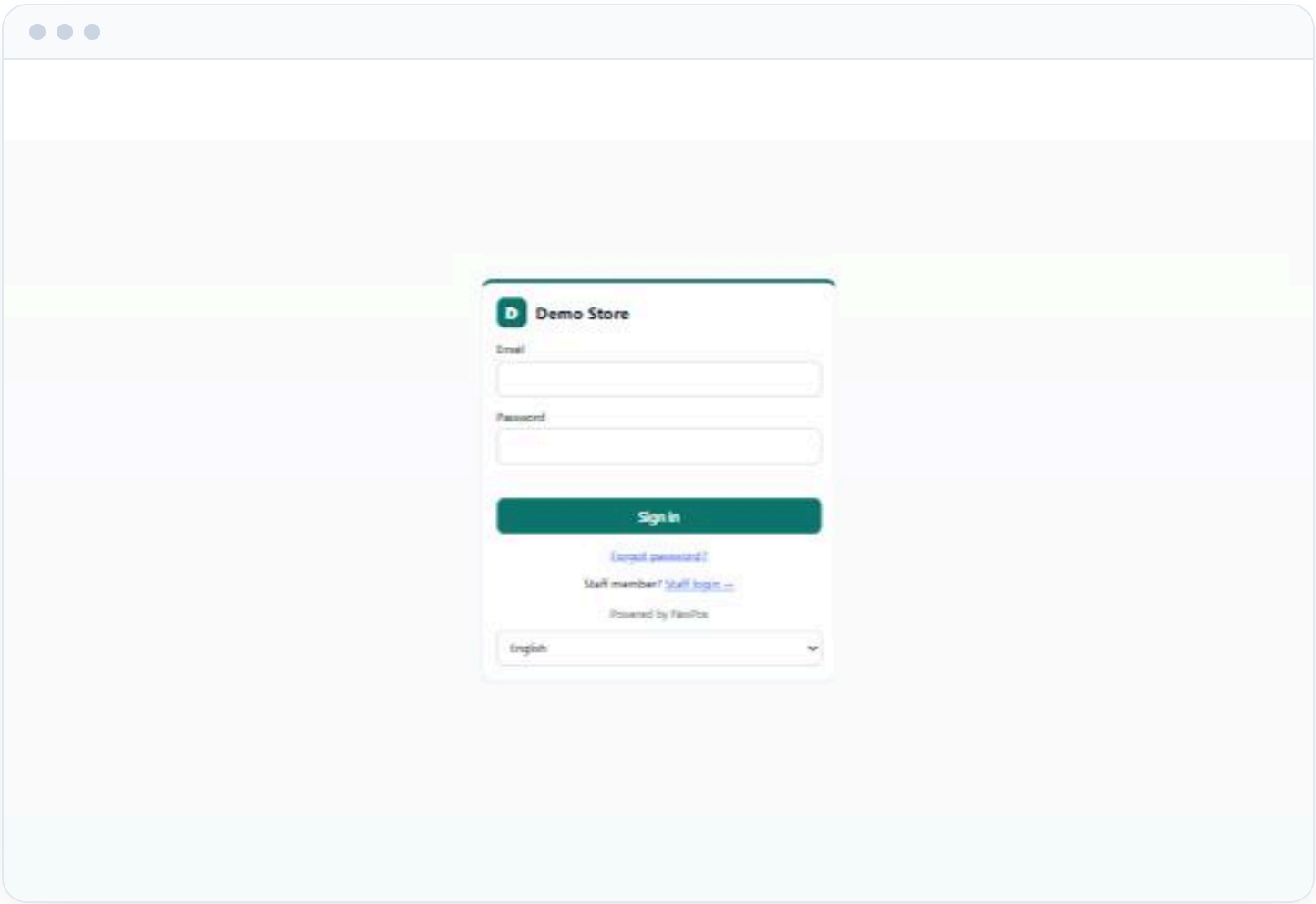
Tip: one email address can only start one free trial. To continue after the trial, you simply take a paid subscription on the same shop — nothing is lost or recreated.

2

Sign in to your shop

Your shop has its own private address and sign-in page.

1. Open your shop's address (for example `yourshop.nexpos.in`) in a browser, or open the NexPos app on your phone.
2. Enter the email and password you chose when signing up.
3. Forgot your password? Click **Forgot password?** and a 6-digit code will be emailed to you to reset it.
4. Staff members (cashiers/managers) sign in from the same page using **Staff login**, or with a 4–6 digit PIN at the till.

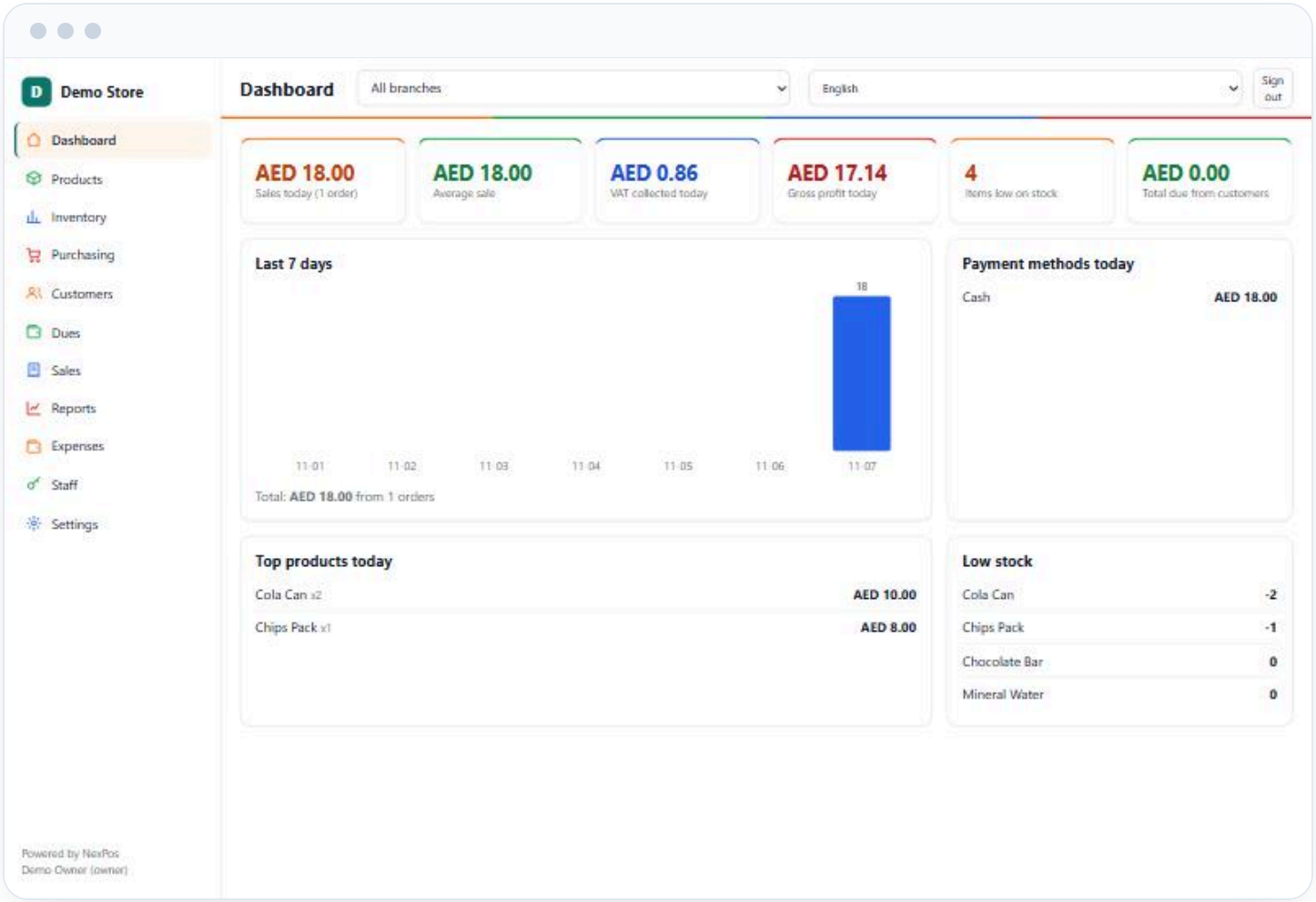


3

Your dashboard at a glance

The first thing you see after signing in.

1. See today's sales, average sale, VAT collected, gross profit, and items running low on stock — all in one glance.
2. The **branch picker** at the top lets you view "All branches" or focus on just one, if you run more than one location.
3. Scroll down for a 7-day sales chart, payment method breakdown, top products, and low-stock alerts.

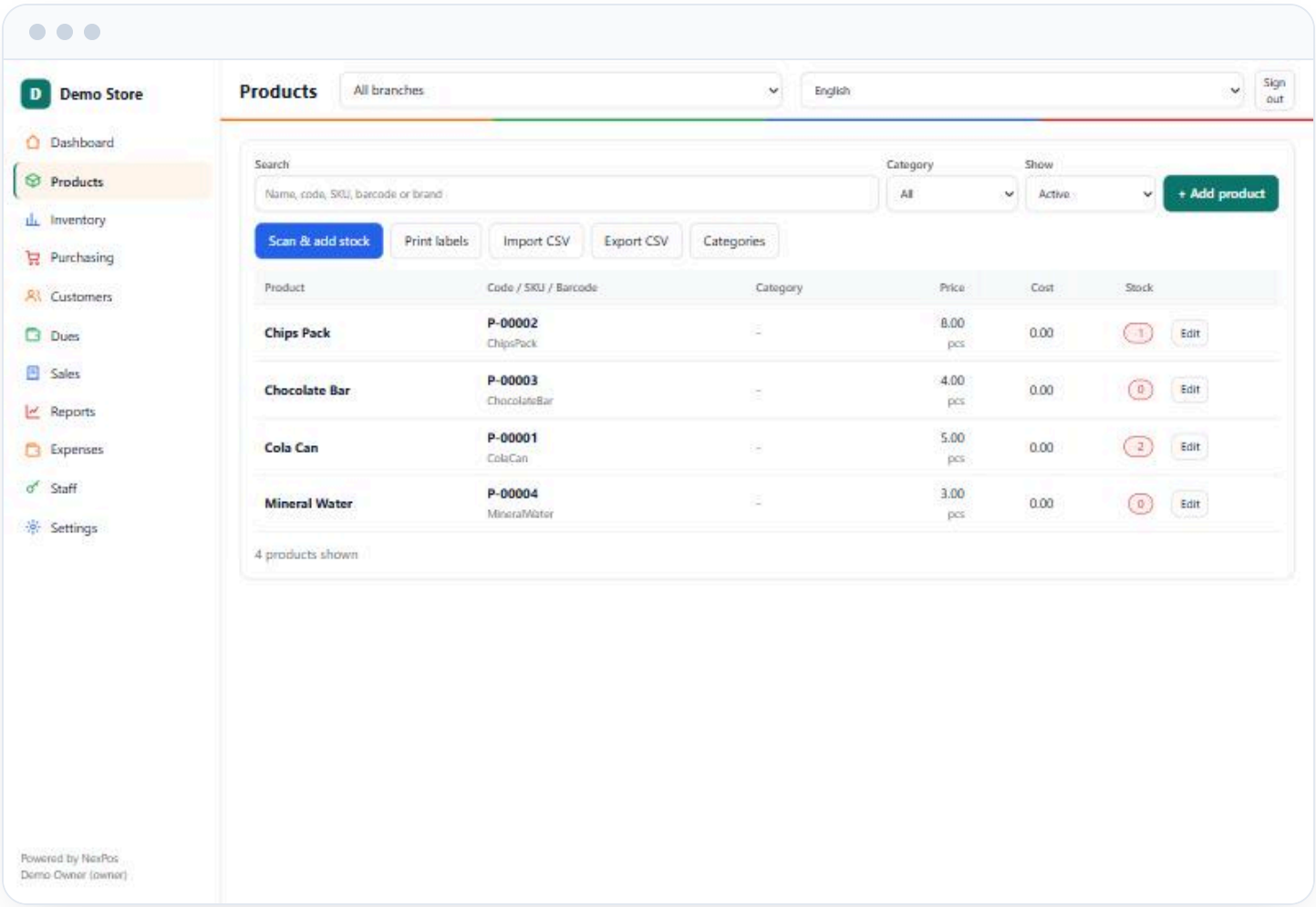


4

Add your products

Go to **Products** in the left-hand menu.

1. Click **+ Add product** and enter the name, price, cost, SKU/barcode, and starting stock.
2. Use **Scan & add stock** to quickly add stock with a barcode scanner.
3. Have a lot of products already? Use **Import CSV** to bring them all in at once, or **Export CSV** to back them up.
4. Running more than one branch? Each product can be set to "Every branch" or limited to specific branches — look for the **Sold at** option on the product form.

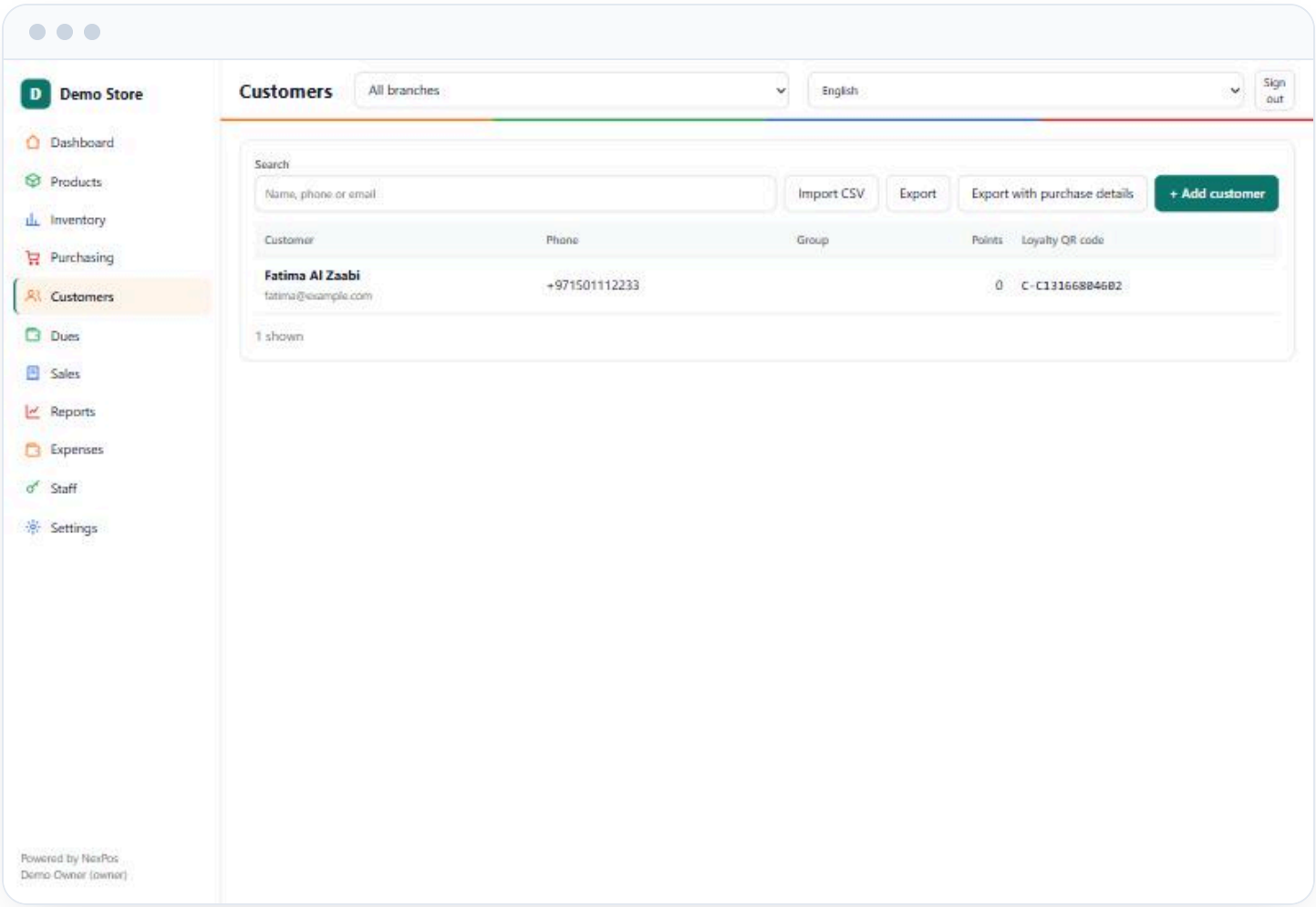


5

Add your customers

Go to **Customers**.

1. Click **+ Add customer** and enter their name, phone, email, and (optionally) a credit limit or payment terms for "pay later" sales.
2. Every customer gets a loyalty QR code automatically — print it with **Print loyalty QR card** from their profile.
3. Import a customer list in bulk with **Import CSV**.
4. With multiple branches, a customer can be shared across all branches, or kept specific to one.

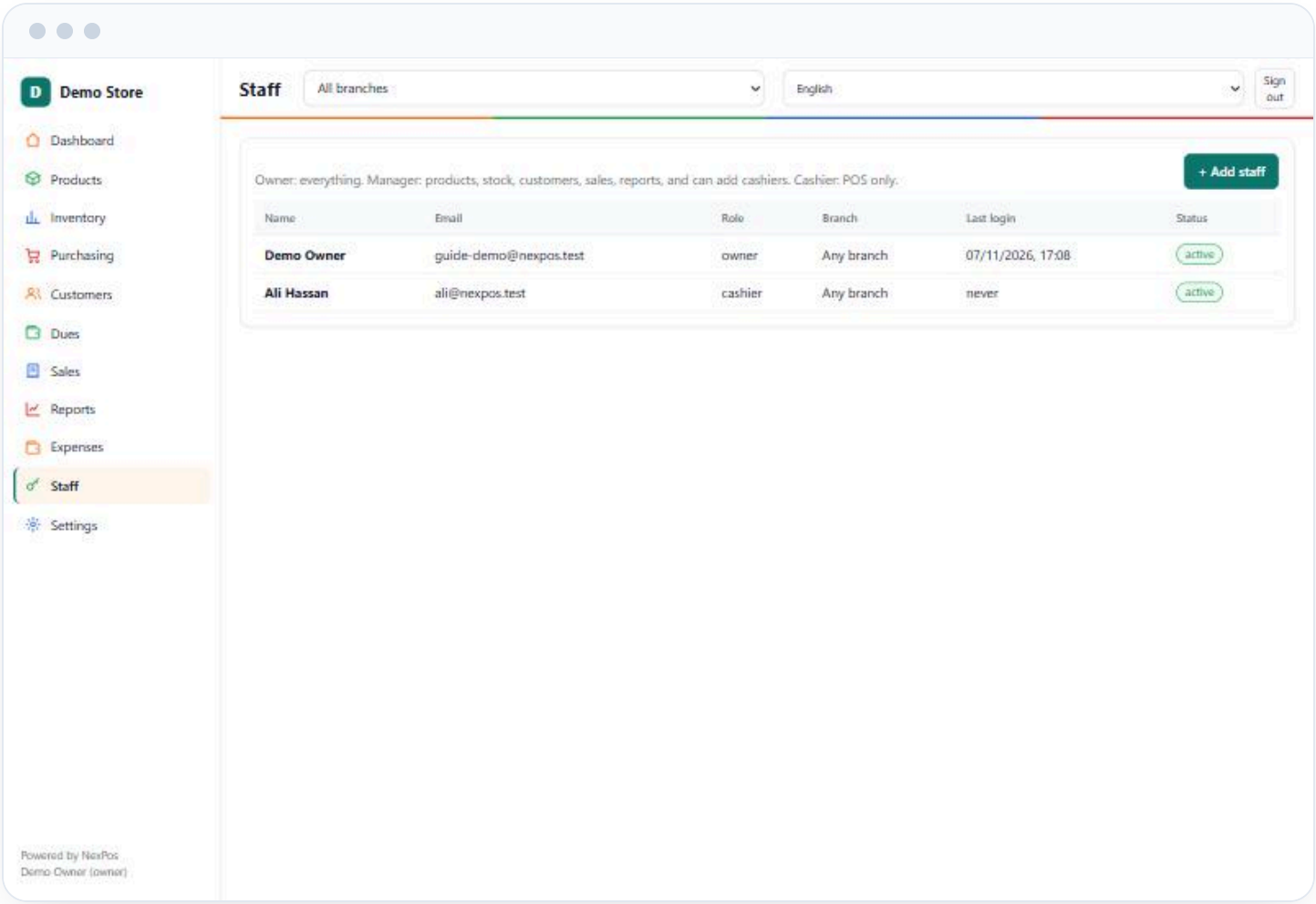


6

Add staff and set their access

Go to **Staff**.

1. Click **+ Add staff** and choose a role: **Owner** (everything), **Manager** (products, stock, customers, sales, reports, and can add cashiers), or **Cashier** (POS only).
2. Set a password for them to sign in, and optionally a 4–6 digit PIN for fast sign-in at the till.
3. With more than one branch, you can pin a staff member to a specific branch — their sales, products and customers will always use that branch.
4. You can disable a staff account at any time without deleting their sales history.

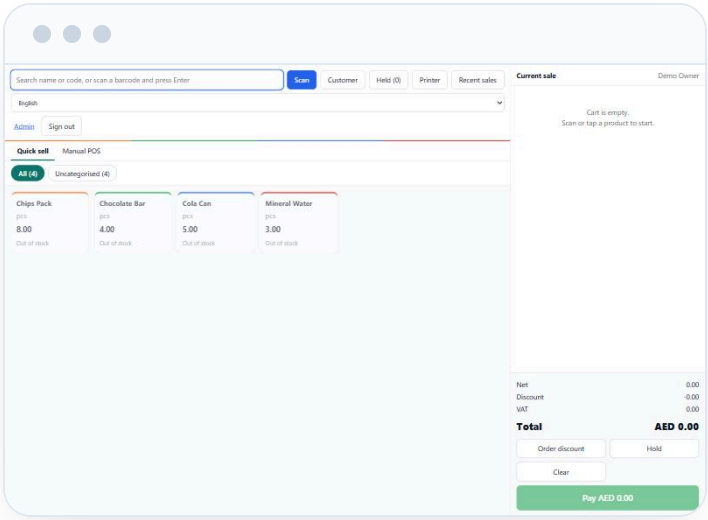


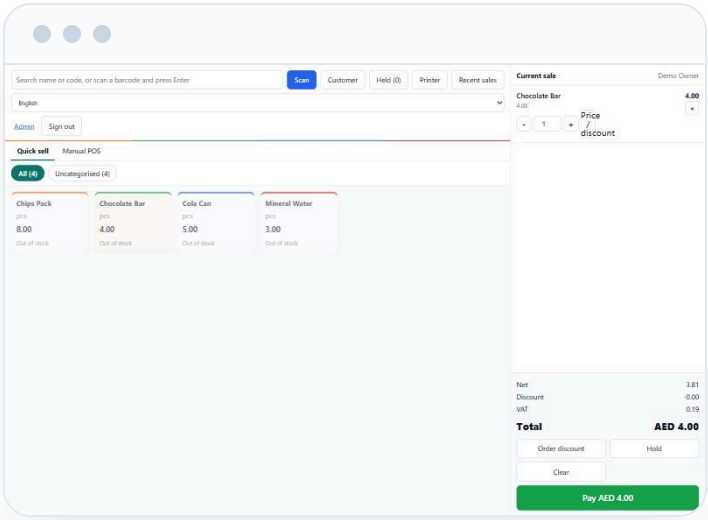
7

Make a sale at the till (POS)

The point-of-sale screen your cashiers use all day.

1. Open the POS screen and sign in (or use a PIN for fast switching between staff).
2. Tap a product tile under **Quick sell**, or search / scan a barcode to add it to the cart.
3. Attach a customer with **Customer** to collect loyalty points or sell on credit.
4. Apply a discount with **Order discount**, or **Hold** a sale to come back to it later.
5. Tap **Pay**, choose the payment method (cash, card, etc.), and the receipt is ready to print or send.



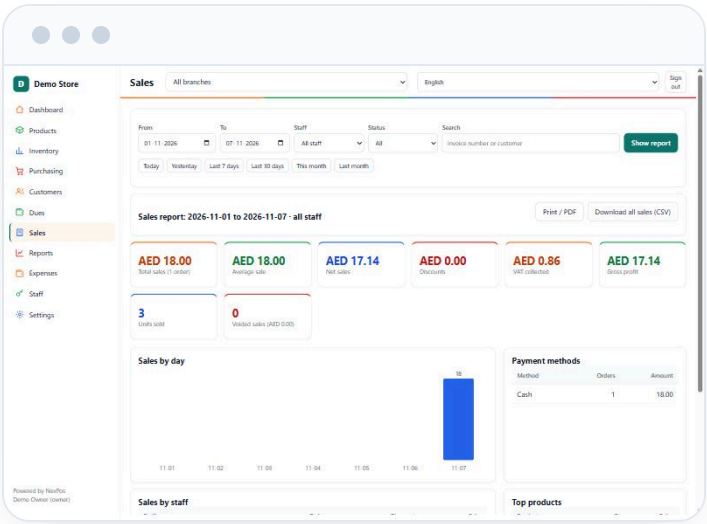


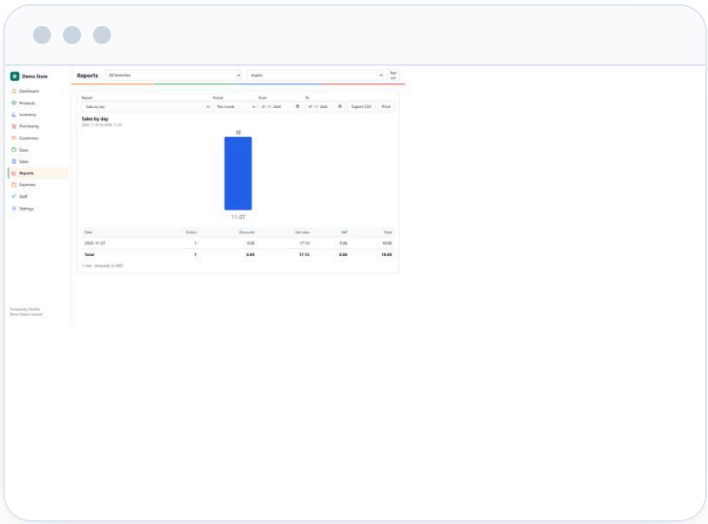
8

Check your sales and reports

Sales shows a running report; **Reports** gives you deeper breakdowns.

1. Filter by date range (Today, Yesterday, Last 7/30 days, This/Last month) and by staff member.
2. See total sales, discounts, VAT collected, gross profit, units sold, and payment methods, with a daily sales chart.
3. Under **Reports**, switch between report types (sales by day, by product, by staff, purchases, expenses, and more).
4. Export any report to CSV, or print / save it as a PDF.



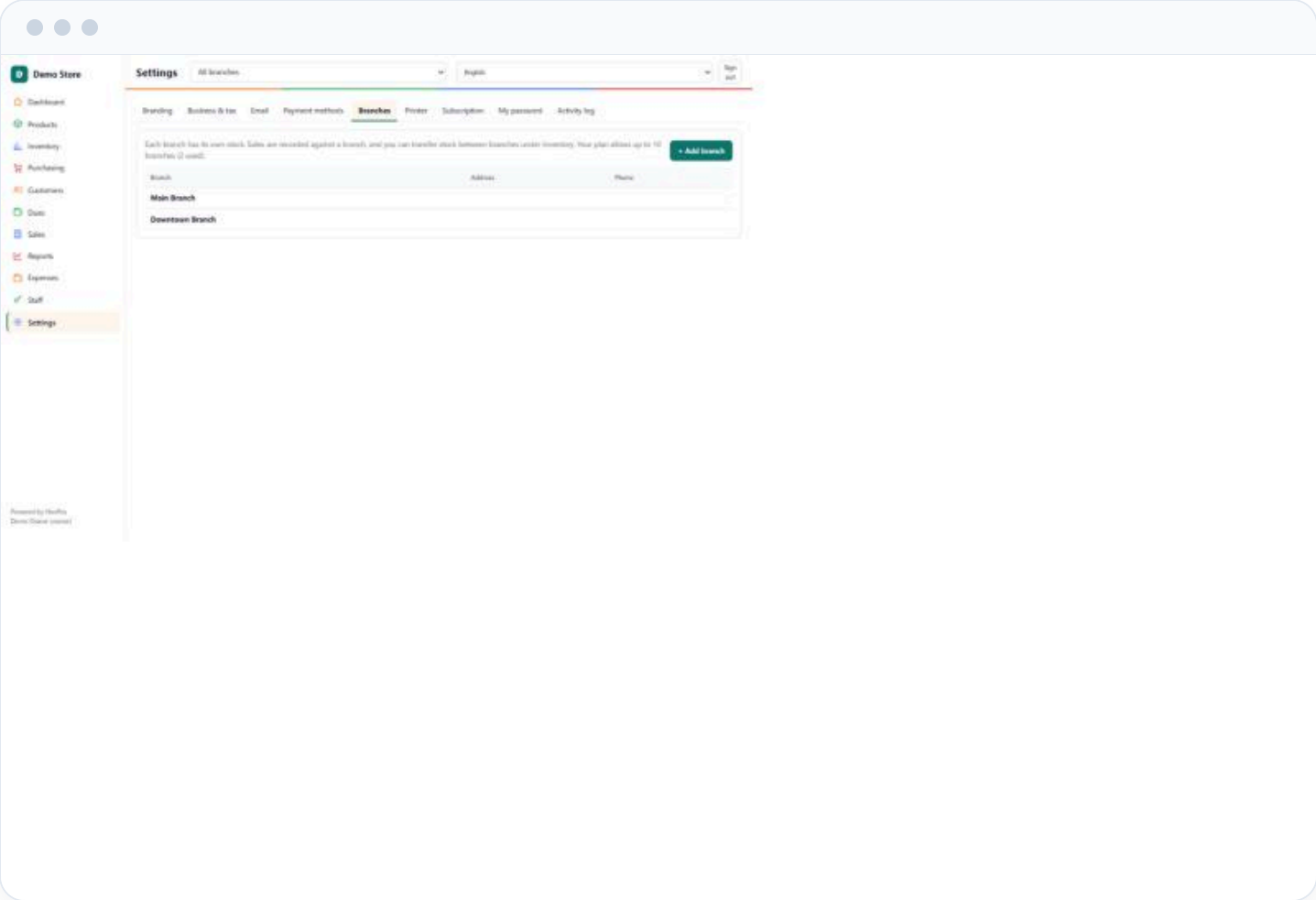


9

Set up more than one branch

Go to **Settings** → **Branches**.

1. Click **+ Add branch** and give it a name, address and phone number.
2. Each branch keeps its own stock — sales are recorded against whichever branch made them.
3. How many branches you can add depends on your plan: 1 branch on Trial and Monthly, up to 10 on Half-year and Annual plans.
4. Once you have more than one branch, a branch picker appears at the top of every screen so you (and your staff) can switch between them, or view all branches combined.

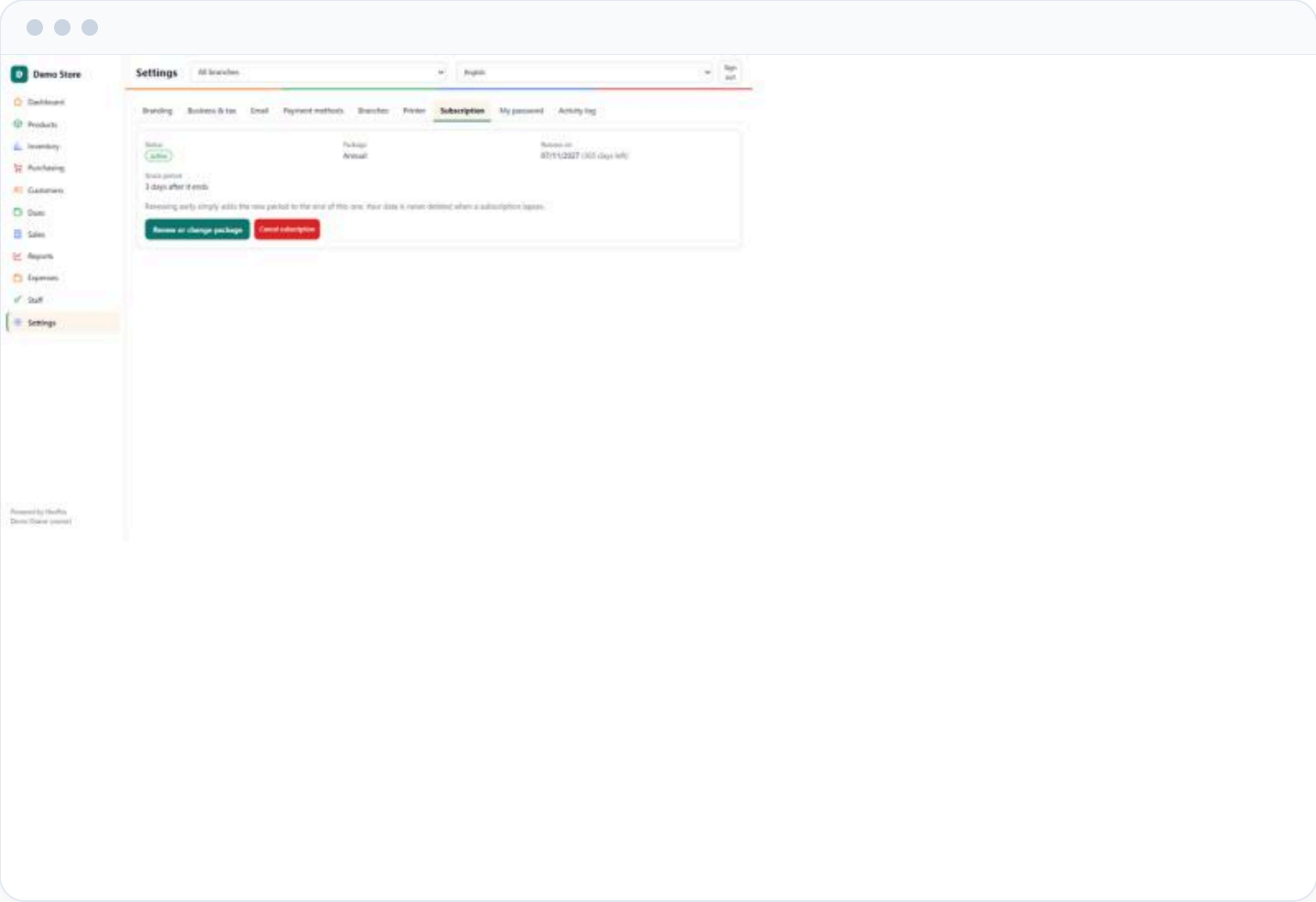


10

Manage your subscription

Go to **Settings** → **Subscription**.

1. See your current plan, status, and renewal date at a glance.
2. Click **Renew or change package** to switch plans or extend your subscription — renewing simply adds the new period to the end of your current one.
3. If your free trial or subscription lapses, the app shows a payment reminder until you renew — your data is kept safe and is never deleted while you're inactive.
4. Need to stop? **Cancel subscription** keeps your shop running until the end of the current period, then it simply stops — no surprise charges.

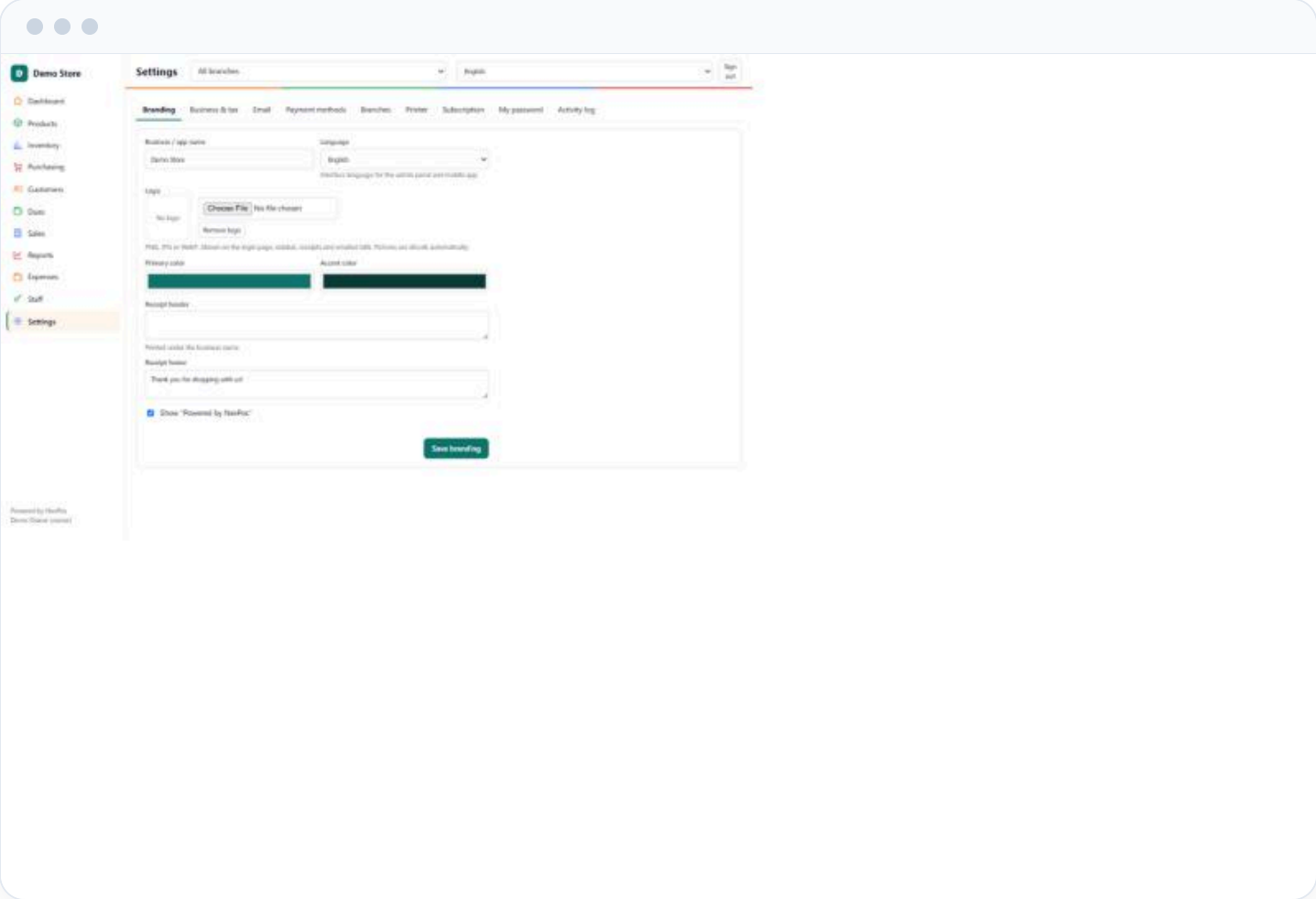


11

Customise branding and receipts

Go to **Settings** → **Branding**.

1. Set your shop/app name, upload your logo, and choose your brand colours — these show on the admin panel, receipts and the mobile app.
2. Add a custom receipt header and footer message (for example, a thank-you note or return policy).
3. Visit the other tabs in Settings to set your tax details (VAT/GST), payment methods, printer, and preferred language.



12

Getting help

Still stuck? We're here.

1. Use the **Contact** link on nexpos.in to reach our team.
2. Check the **FAQ** section on the homepage for quick answers.
3. Download the Android app from the **Get the app** page to run your shop from your phone, wherever you are.
