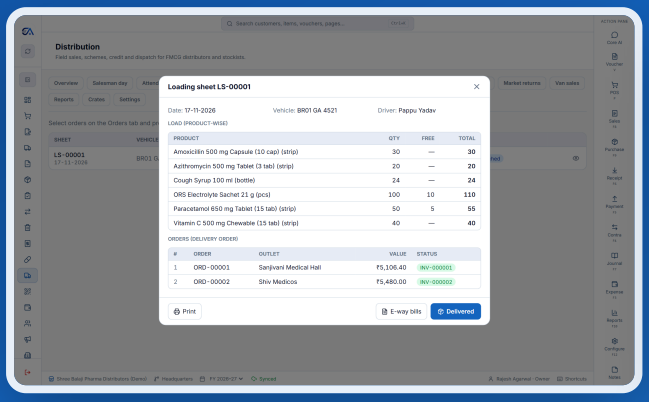
CoreAxis ePOS

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

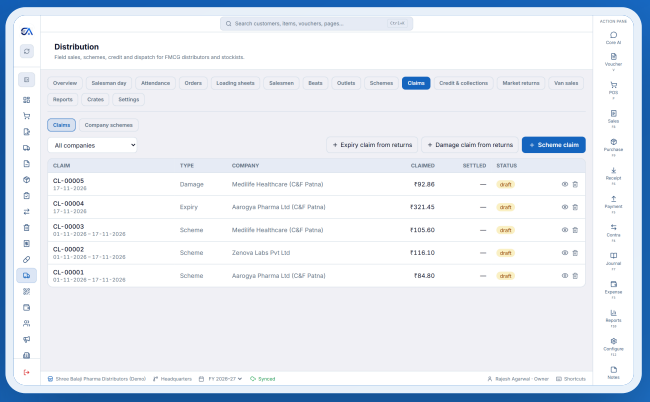
USER GUIDE · PHARMA DISTRIBUTORS & STOCKISTS

Pharma Distribution Guide

Run a pharma stockist on CoreAxis ePOS — medicines with batch and expiry, company purchases, MRs and beats, chemist orders with company schemes, loading sheets and GST billing, proof of delivery, collections, expiry returns and company claims. Each step is shown on the real application.



Loading sheet — load, orders and bills for one vehicle



Scheme, expiry and damage claims to each company

Example business
Shree Balaji Pharma Distributors, Govind Mitra Road, Patna

Inside
15 chapters · 75+ steps · 31 real screens

Works on
Web, Windows desktop and Android — online or offline

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

Contents

01 Getting Started
02 The Distribution Module at a Glance
03 Medicines: Products, Batch and Expiry
04 Companies (Suppliers) and Purchase with Batch
05 Salesmen (MRs) and Their App Login
06 Beats and Chemist Outlets
07 Trade Schemes from the Company
08 Booking Orders
09 Loading Sheet, Billing and Dispatch
10 Delivery and Proof of Delivery
11 Credit Control and Collections
12 Market Returns: Expiry and Breakage
13 Claims to the Company
14 Reports, GST and Ledgers
15 Settings and the MR App
✓ Daily Checklist
@ Support and Contact

How the workflow fits together

Medicines & batches → Company purchase → MRs, beats, chemists → Schemes → Order → Loading sheet & bill → Delivery proof → Collection → Expiry returns → Company claims → Reports & GST

Who this guide is for

1. Pharma distributors, stockists and C&F-fed wholesalers
2. Office staff who bill, dispatch and accept collections
3. Medical representatives (MRs) using the ePOS app
4. Sales and onboarding teams giving a step-by-step demo

Example data used in the screens

1. 6 medicines with batch and expiry, 3 companies
2. 2 MRs, 2 beats, 5 chemist outlets with credit terms
3. 3 company schemes — 10+1, 20+2 and a slab discount
4. 4 orders, 1 loading sheet, 2 bills, deliveries, collections, returns and claims

HOW TO READ Each chapter starts with what it is for, followed by numbered steps. Bold words are the exact buttons and menu names on screen. The figure under the steps shows the same screen filled in with the example data.

CHAPTER 1

01 Getting Started

CoreAxis ePOS runs your whole stockist business — purchase from the company, stock with batch and expiry, field orders from your MRs, dispatch, billing, collections and claims — in one place. This guide follows a sample pharma distributor in Patna, **Shree Balaji Pharma Distributors**.

Create the business

1. Open **coreaxis.cloud/app/register** and enter the firm name, your name, mobile and email.
2. Choose **FMCG Distribution** as the business type. It switches on Field Sales, Trade Schemes, Credit Control and the distribution screens.
3. Ask CoreAxis support to add the **Pharmacy** module to your plan. It adds drug schedule, generic name / composition, batch and expiry tracking.
4. Verify the OTP and finish the setup wizard: business profile, GSTIN, drug licence numbers and invoice numbering.

Sign in every day

1. Office staff sign in at **coreaxis.cloud/app/login** (or the Windows / Android app).
2. Medical representatives (MRs) sign in on the **CoreAxis ePOS** Android app with their own login. It opens straight in **Salesman mode**: today's beat, outlets, order booking and collections.

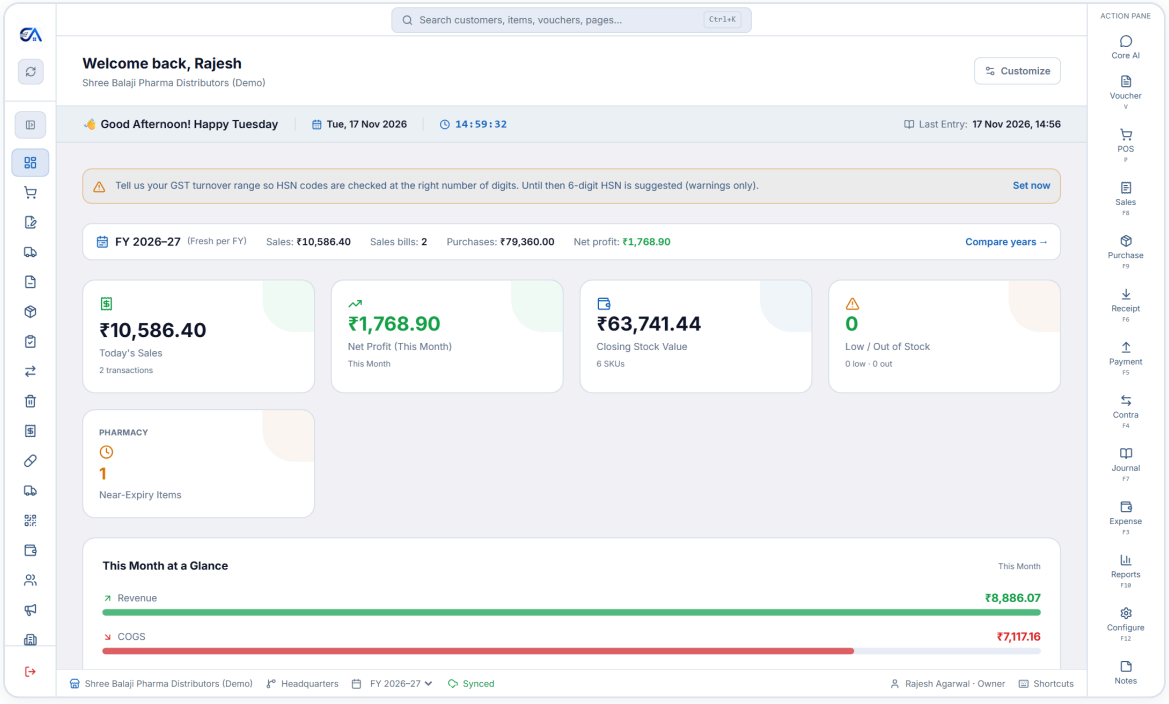


Figure — Dashboard — sales, purchase, stock value and today's activity of the distributor

TIP Press **Ctrl+K** on any screen to jump to a page by name. The **Action Pane** on the right opens every voucher: Sales (F8), Purchase (F9), Receipt (F6), Payment (F5) and more.

02

CHAPTER 2

The Distribution Module at a Glance

Open **Distribution** in the sidebar. Every part of the field and dispatch work has its own tab.

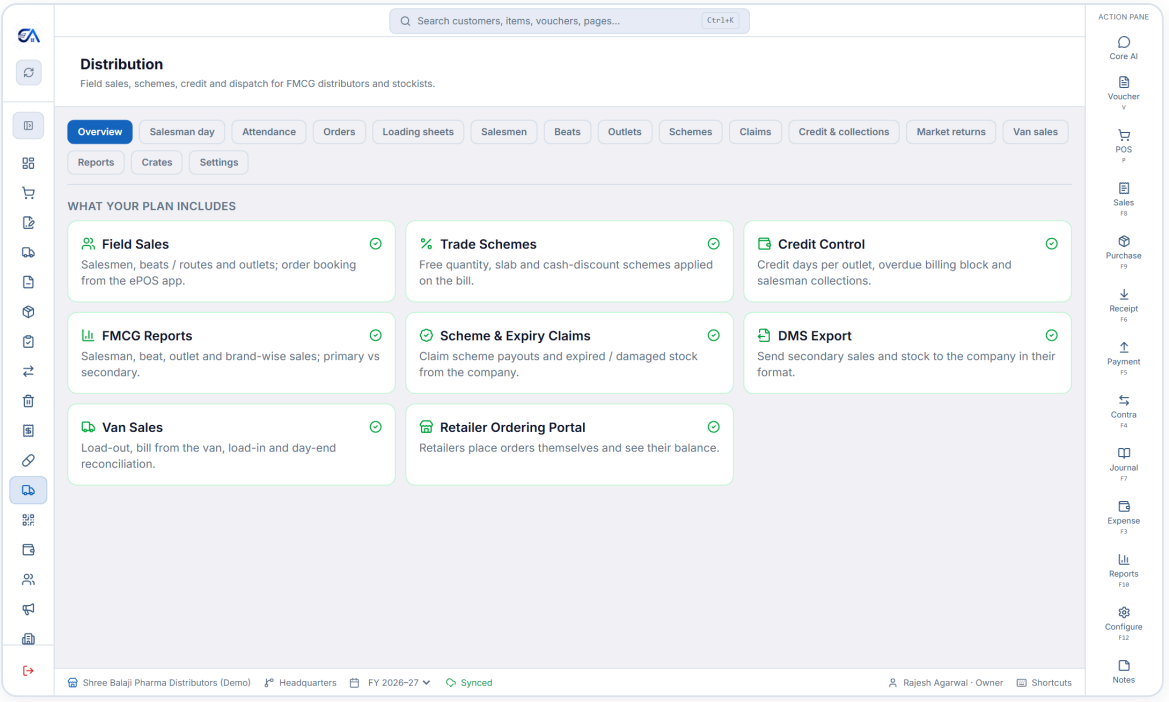


Figure — Distribution → Overview: what your plan includes, and a tab for each part of the work

Tab	What you do there
Salesman day / Attendance	Each MR's day: visits, orders, collections, start / end of day
Orders	Orders booked by MRs or the office — confirm, edit, bill
Loading sheets	Group orders for one vehicle, bill them together, dispatch, e-way bills
Salesmen / Beats / Outlets	Your MRs, their routes (beats) and the chemists on each beat
Schemes / Claims	Company trade schemes (10+1, slab discount) and claims back to the company
Credit & collections	Outstanding per chemist, credit days and limits, cash / UPI / cheque collections
Market returns	Expired, damaged and saleable returns from chemists
Reports / Settings	Salesman, beat, outlet and scheme reports; rules for attendance, GPS and credit

03

CHAPTER 3

Medicines: Products, Batch and Expiry

Each medicine is a product with its HSN, GST rate, MRP, drug schedule and the company that makes it. Stock is kept batch-wise with expiry, so the oldest batch goes out first (FEFO).

Add a medicine

1. Go to **Inventory → Add Product**.
2. Enter the **Product name** as it is sold, e.g. *Paracetamol 650 mg Tablet (15 tab)*, and an **SKU** code.
3. Enter the **Selling price** (your rate to the chemist), the **MRP** and the **Cost price**.
4. Fill **HSN** (e.g. 300490) and pick **GST 12%**. Six-digit HSN is suggested for larger turnover.
5. In the pharmacy fields enter the **Generic name / Composition** and the **Drug schedule** (None, H, H1, X).
6. Pick the **Supplier** (the company). Expiry and damage claims go to this company.
7. Switch on **Track batch**, keep Opening stock at 0 — stock comes in through purchase — and click **Save**.

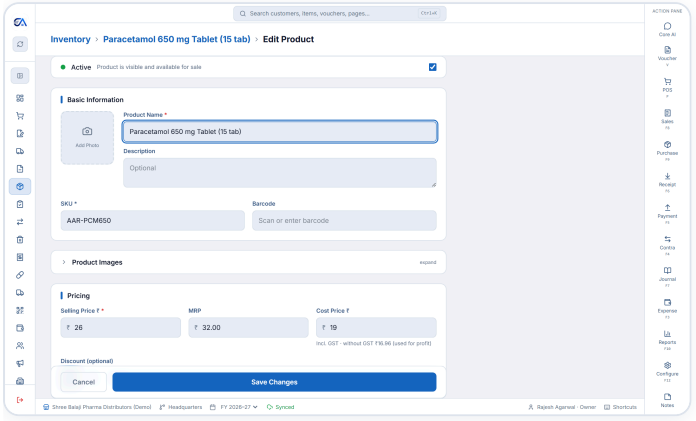


Figure — Product form — name, SKU, selling price, MRP and cost

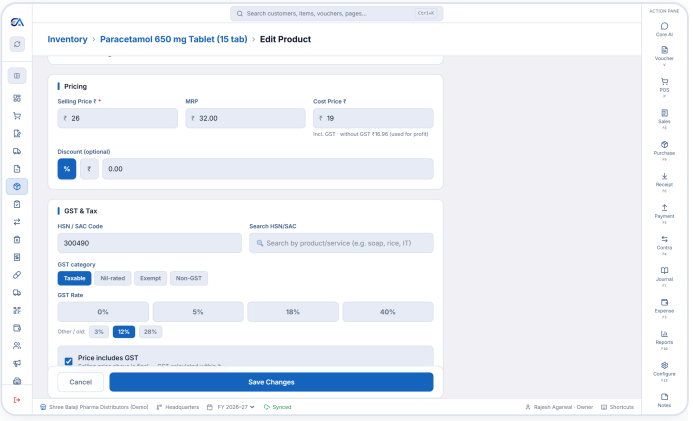


Figure — GST & Tax — HSN 300490 and GST 12%

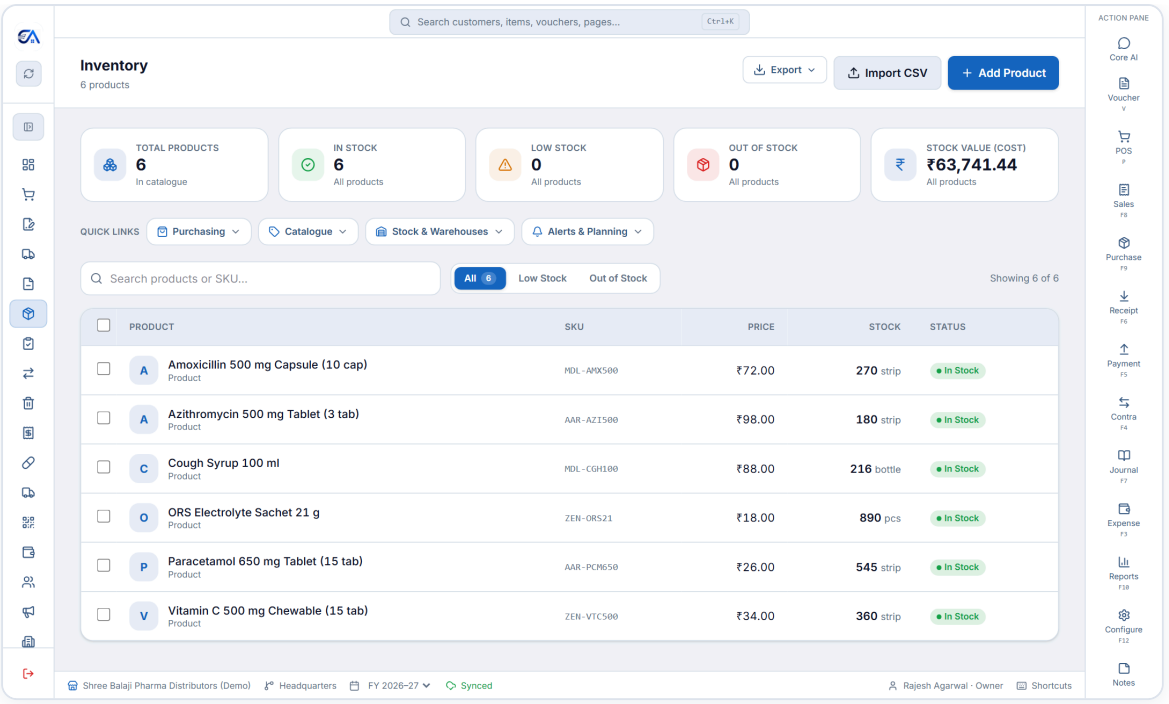


Figure — Inventory — six medicines with live stock after the company purchases

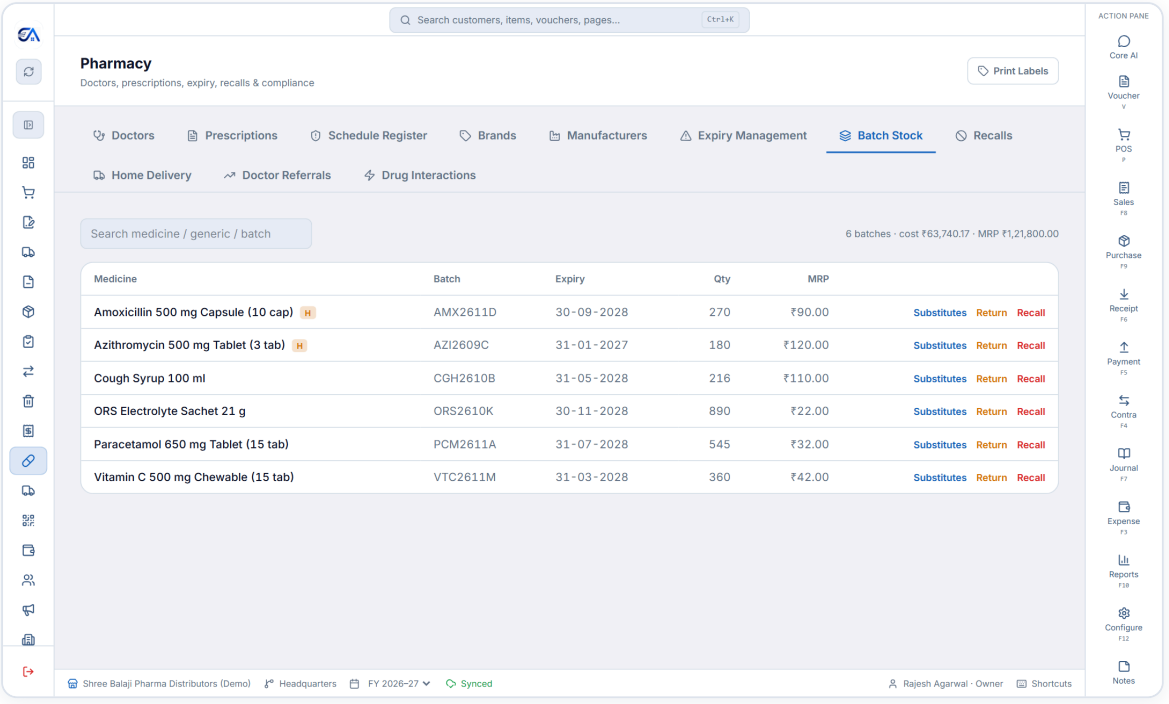


Figure — Pharmacy → Batch Stock — every batch with expiry and quantity; Schedule H medicines carry an “H” tag

TIP Use **Pharmacy → Expiry Management** every month to see batches expiring in the next 30 / 60 / 90 days and return them to the company in time.

GOOD TO KNOW A **Schedule H / H1** drug needs a prescription only at a chemist’s counter sale to a patient. Your bill to a chemist is a wholesale bill, so no prescription is asked.

04

CHAPTER 4

Companies (Suppliers) and Purchase with Batch

Your companies — or their C&F agents — are your suppliers. Every purchase adds stock batch-wise, books the company's account and your GST input credit (ITC).

Add a company

1. Go to **Inventory → Suppliers → Add Supplier**.
2. Enter the name, phone, address and **GSTIN**. The GSTIN is checked as you type and fills the state.
3. Click **Create Supplier**.

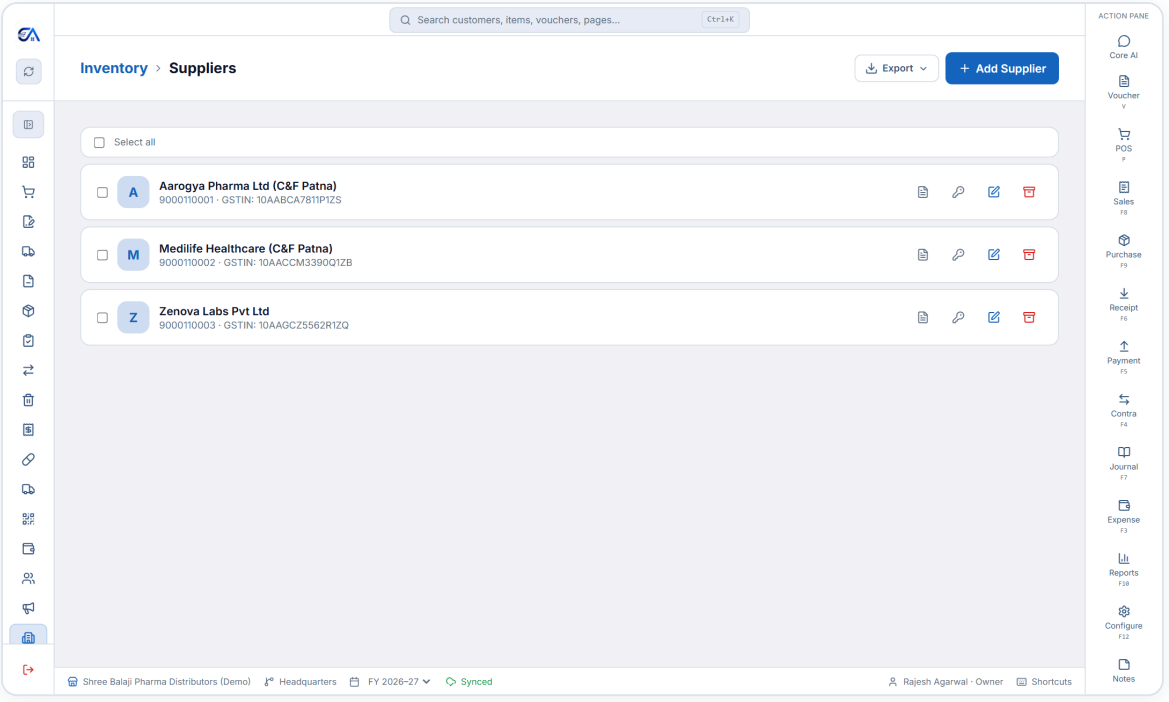


Figure — Suppliers — the three companies of the sample distributor

Enter the company invoice

1. Press **F9** (Purchase) or open **Inventory → Purchase Orders → New PO**.
2. Enter the **Supplier invoice no.** and date, and pick the supplier.
3. Add each medicine with its quantity and rate. For each line enter the **Batch no.** and **Expiry date** from the company invoice.
4. Leave Cash / Bank empty for a credit purchase — the amount goes to the company's ledger.
5. Click **Save Purchase**. Stock, batch, the company ledger and ITC update together.

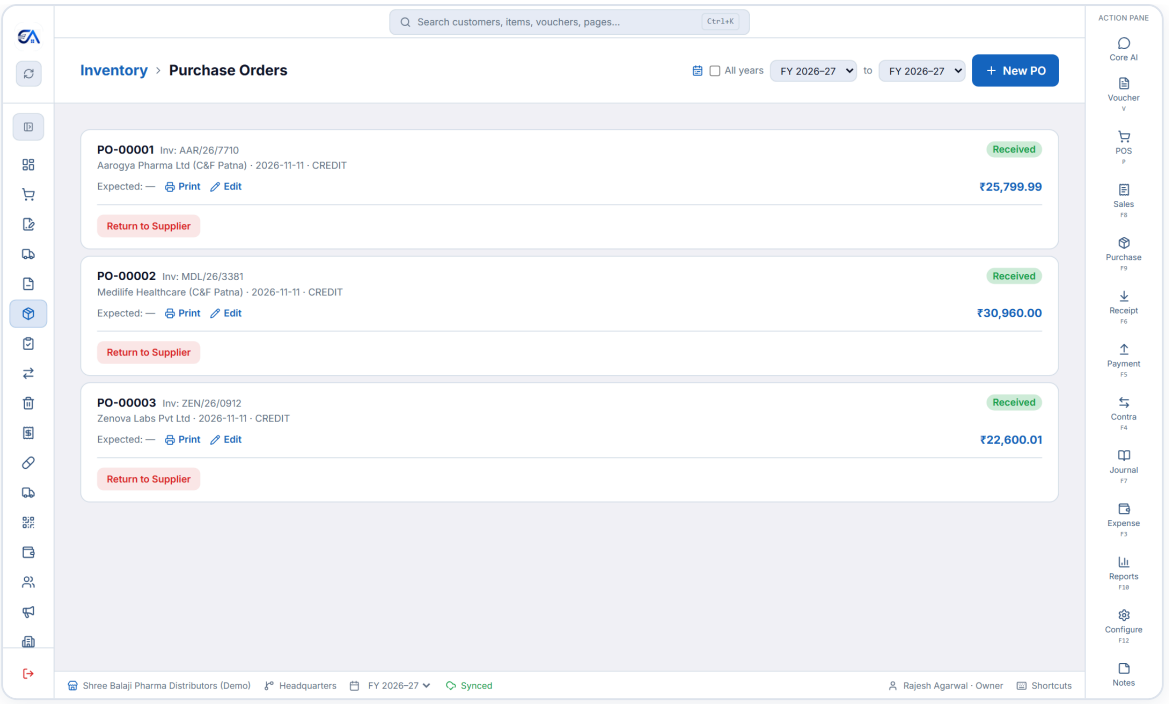


Figure — Purchase orders — company invoices received into stock

05

CHAPTER 5

Salesmen (MRs) and Their App Login

Every MR is a salesman. Link a salesman to a login with the **Salesman** role so that on the app he sees only his own beats, outlets and orders.

1. Create the login first: **Settings** → **Users** → **Add user**, role **Salesman**.
2. Go to **Distribution** → **Salesmen** → **Add salesman**.
3. Enter the name, a code (e.g. MR-01) and phone, and pick the **App login**.
4. Click **Save**. The MR can now sign in on the CoreAxis ePOS app.

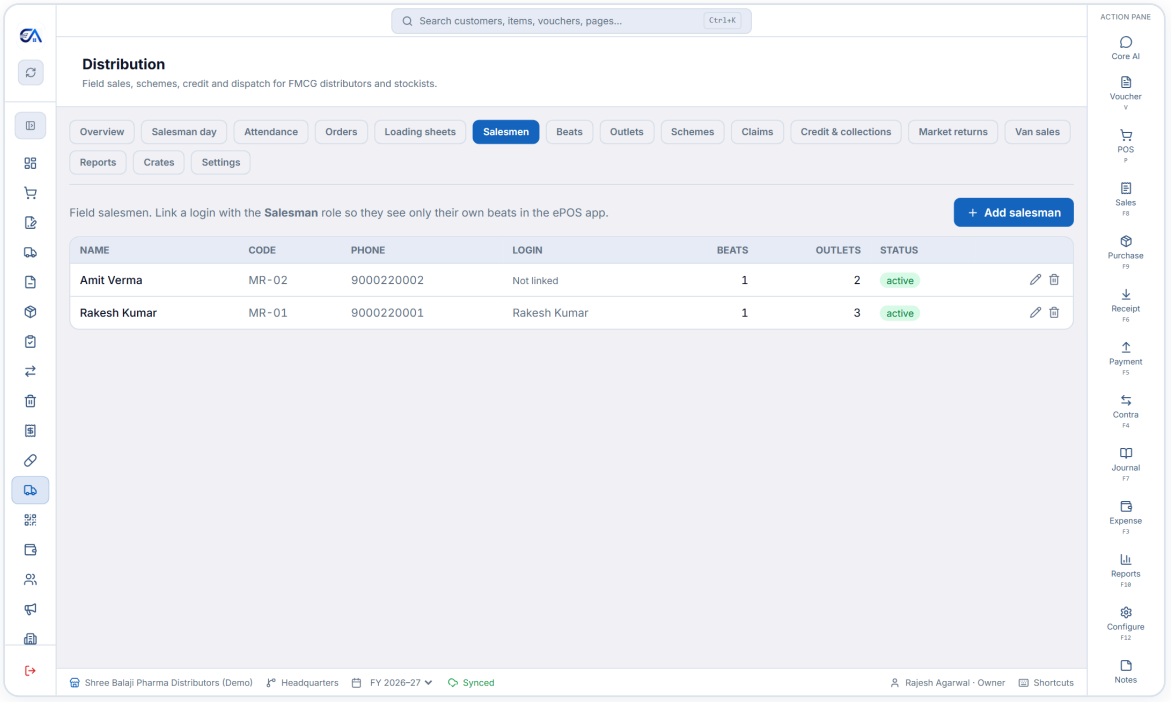


Figure — Salesmen — Rakesh Kumar (with app login) and Amit Verma

TIP Set a monthly sales target per MR in **Distribution** → **Reports** → **Targets**. The Salesman productivity report shows achievement against it.

CHAPTER 6

06 Beats and Chemist Outlets

A beat is a fixed route an MR visits on fixed days. Each chemist (outlet) belongs to one beat.

Create a beat

1. Go to **Distribution → Beats → Add beat**.
2. Enter a name (e.g. *Govind Mitra Road*) and code, pick the salesman and tick the visit days.
3. Click **Save**.

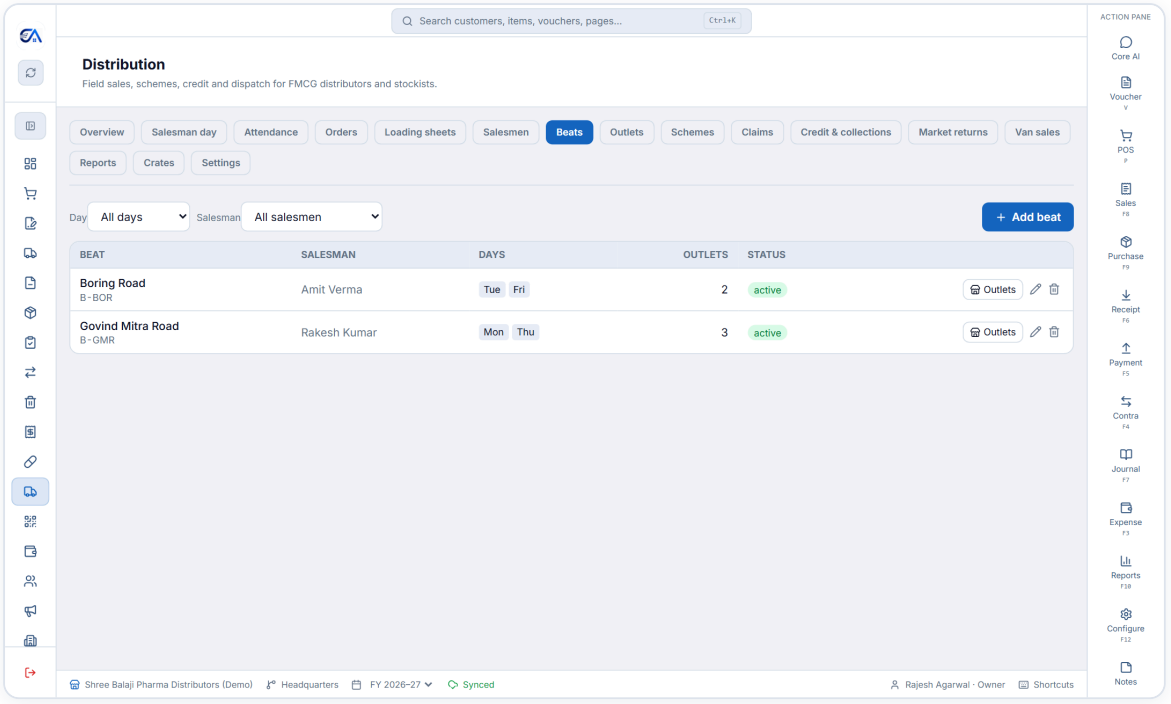


Figure — Beats — Govind Mitra Road (Mon, Thu) and Boring Road (Tue, Fri)

Add a chemist outlet

1. Go to **Distribution → Outlets → Add outlet**.
2. Enter the shop name, phone, **GSTIN** (if registered), address and the owner / contact person.
3. Pick the outlet type **Chemist**, the class (A = biggest buyers) and the beat.
4. Tap **Use my current location** when you are at the shop, so visits and deliveries can be checked by GPS.
5. Click **Save**. The outlet is also a customer with its own ledger.

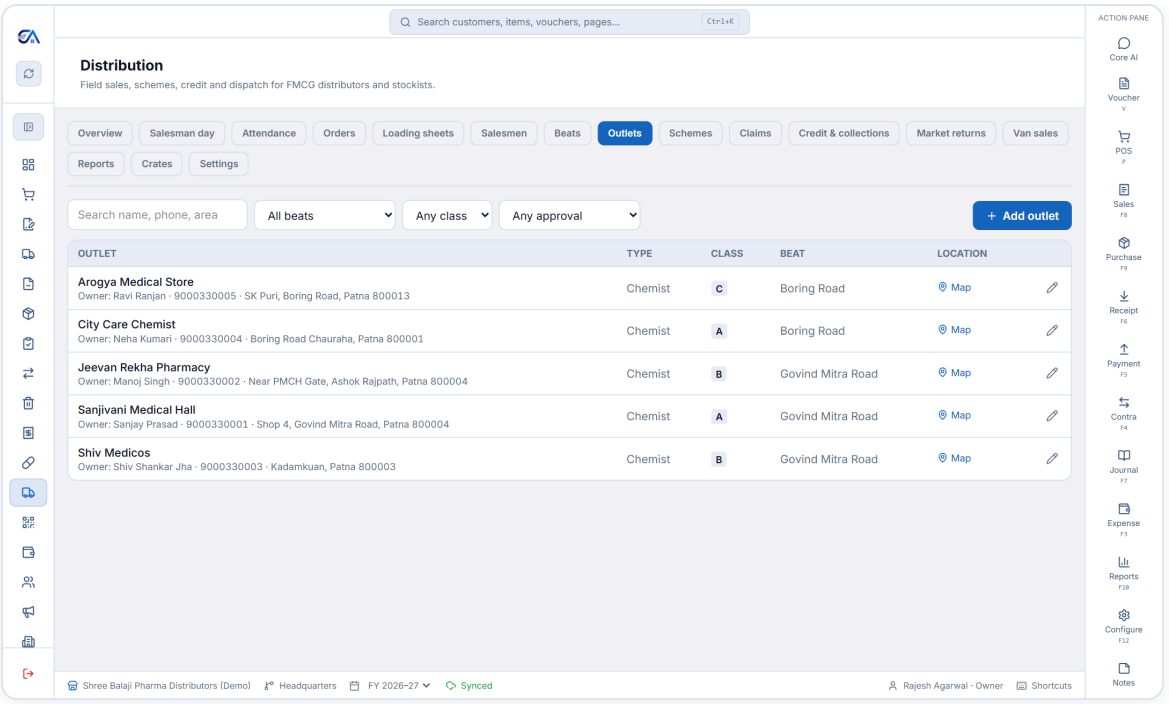


Figure — Outlets — five chemists across two beats

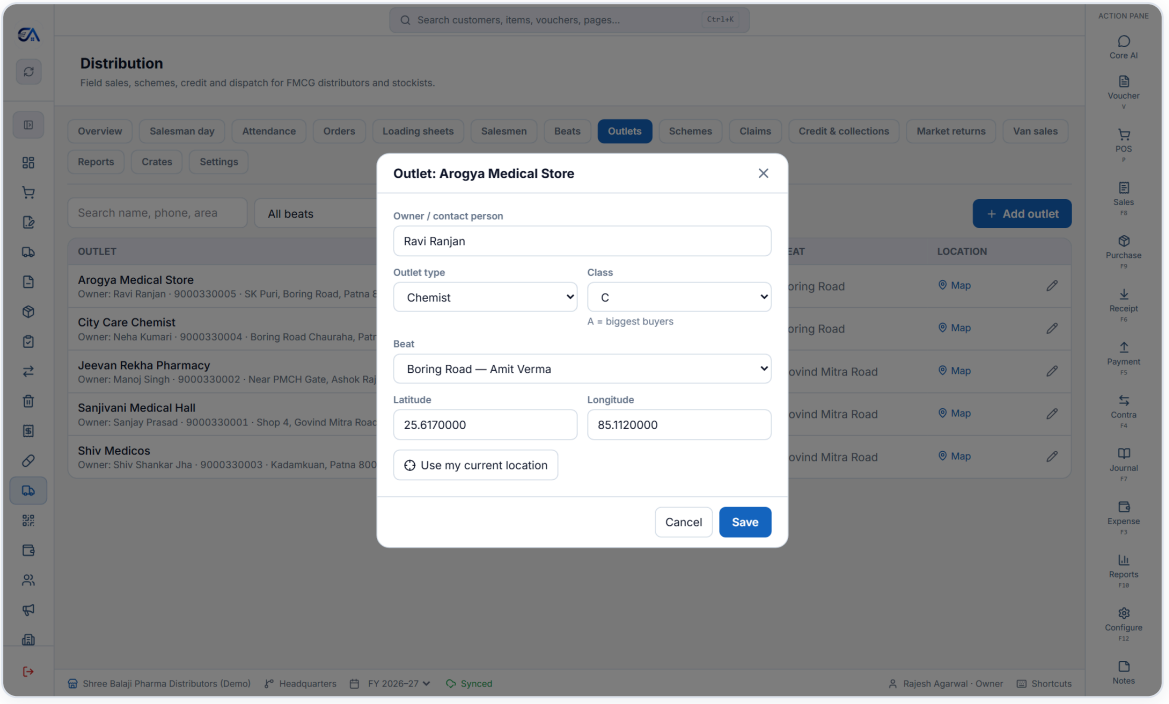


Figure — Outlet form — type Chemist, class, beat and location

GOOD TO KNOW Outlets an MR adds from the app can wait for office approval. Switch this on in **Distribution → Settings**.

07

CHAPTER 7

Trade Schemes from the Company

Company schemes are applied by themselves when an order is booked. Free goods go on the bill at zero value, and you claim their cost back from the company.

Scheme type	Example in this guide
Free quantity (buy X get Y)	Paracetamol 650 — 10+1; ORS 20+2
Slab discount	Cough Syrup — 3% on 12+ bottles, 5% on 24+
Order-value discount	e.g. 2% on orders above ₹10,000 (can stack on top)
Combo	e.g. 2 Amoxicillin + 1 ORS → 1 ORS free

1. Go to **Distribution → Schemes → New scheme**.
2. Enter the name, pick the **Type** and the products (or brands / all products).
3. Enter the quantities or slabs, and the valid-from / valid-to dates.
4. Pick **Funded by (company)** and keep **Claimable** ticked so the scheme shows up in claims.
5. Click **Save**.

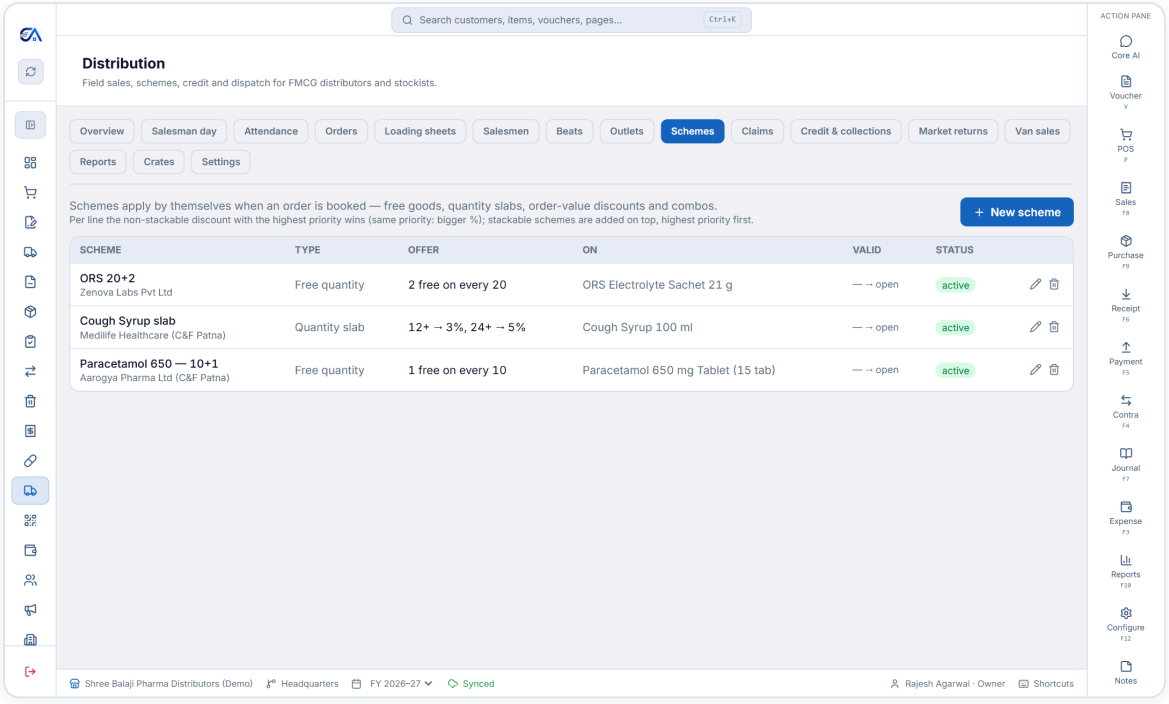


Figure — Schemes — three company schemes, each funded by its company

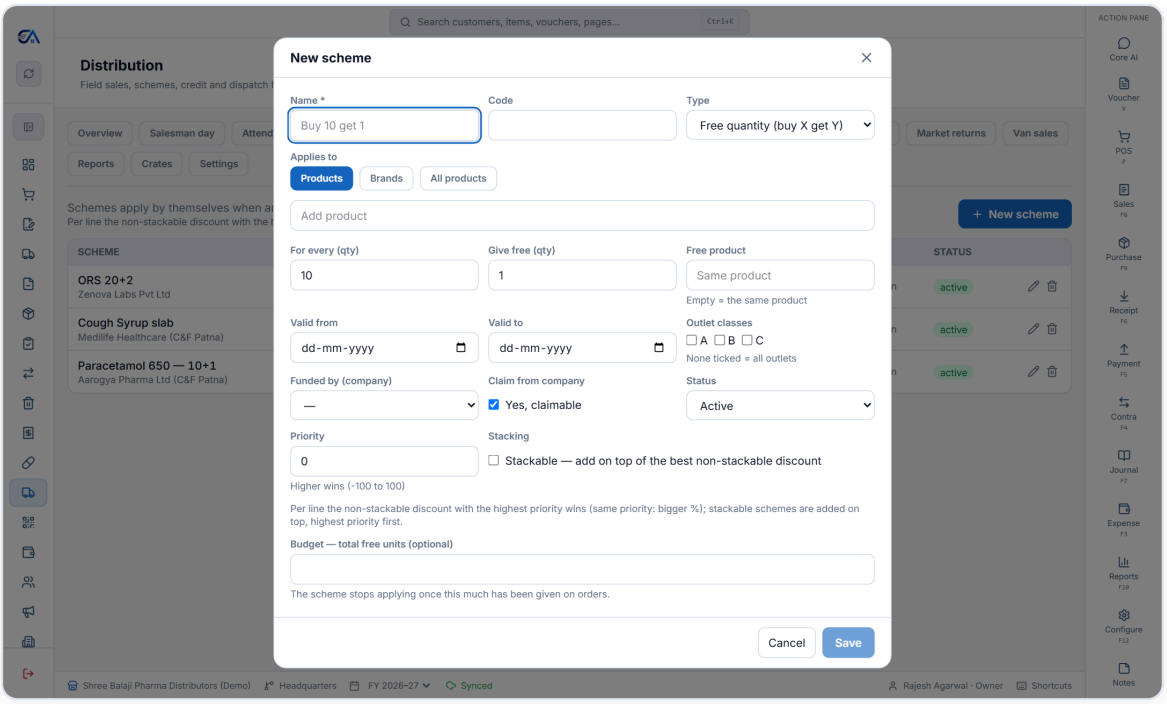


Figure — New scheme form

TIP If two schemes fit the same line, the higher **Priority** wins. A scheme marked **Stackable** is added on top.

CHAPTER 8

08 Booking Orders

MRs book orders on the app at the chemist's counter — online or offline. The office can also book an order on the web, for example a phone order.

1. Go to **Distribution → Orders → New order**.
2. Search the outlet by name or phone and pick it. The salesman and beat fill in by themselves.
3. Add medicines and quantities. Scheme free goods and discounts are worked out when the order is saved.
4. Click **Book order**.

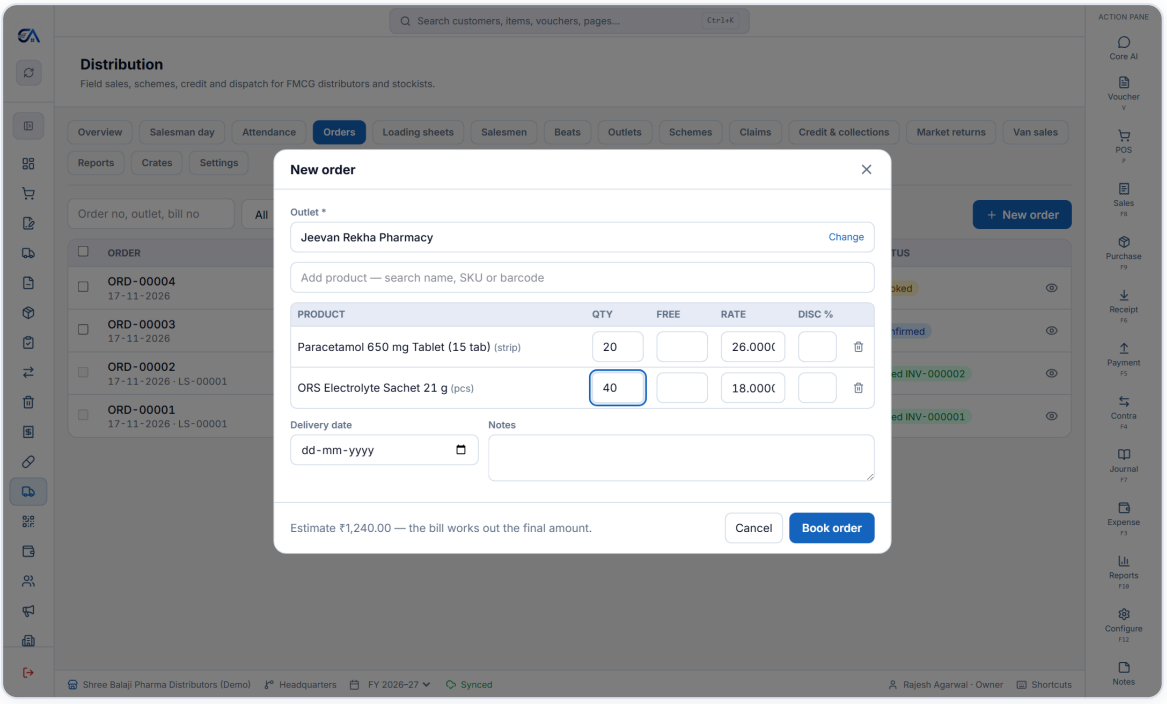


Figure — New order — Jeevan Rekha Pharmacy, Paracetamol 20 and ORS 40

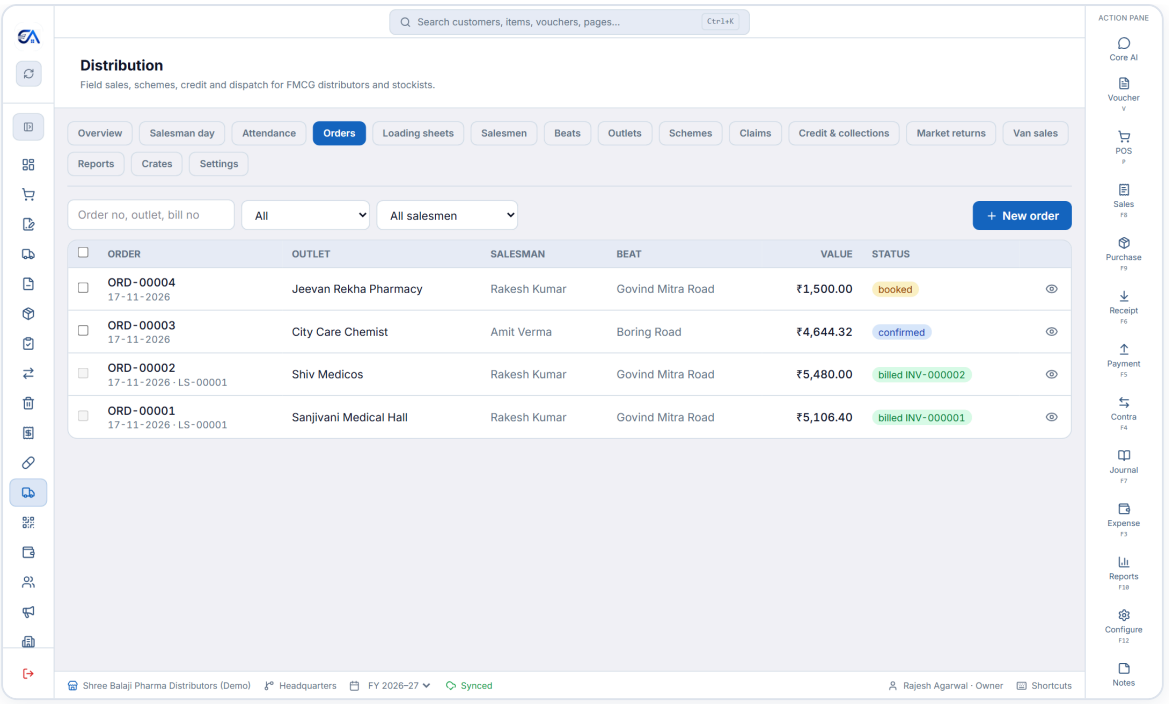


Figure — Orders — booked, confirmed and billed orders with their outlet, MR and beat

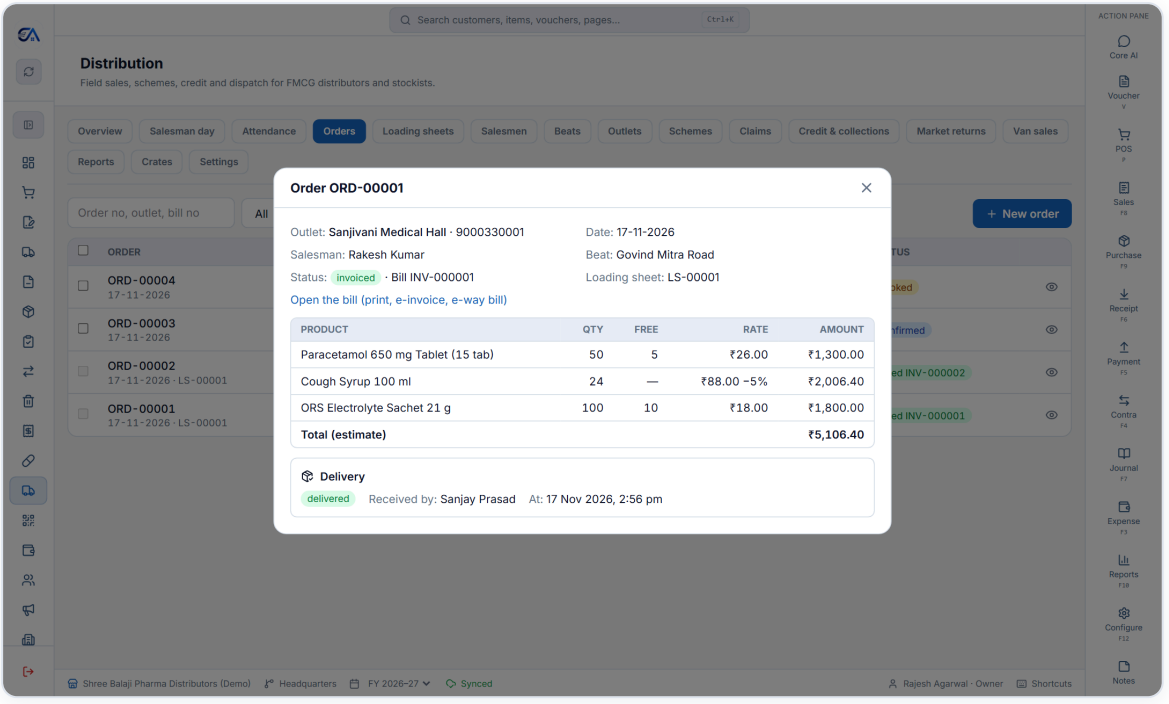


Figure — Order ORD-00001 — the 10+1 scheme added 5 free strips of Paracetamol, the ORS 20+2 scheme 10 free sachets

IMPORTANT An outlet with an overdue bill can be blocked from new orders. The office can override. Set the rule in **Distribution → Settings**.

09

CHAPTER 9

Loading Sheet, Billing and Dispatch

Group the day's confirmed orders for one vehicle into a loading sheet. The godown packs from the product-wise totals, the office bills the orders, and the vehicle leaves.

1. On **Orders**, open each order and click **Confirm**.
2. Tick the confirmed orders and click **Loading sheet**. Enter the vehicle number and driver.
3. Open the sheet: the **Load** table shows the total of each medicine (paid + free) to pack.
4. Click **Bill on credit**. One GST bill is made per order, batch-wise and FEFO, and posted to each chemist's ledger.
5. For bills above the e-way limit click **E-way bills** to make them for the whole sheet.
6. Click **Dispatch** when the vehicle leaves, and **Print** the sheet for the driver.

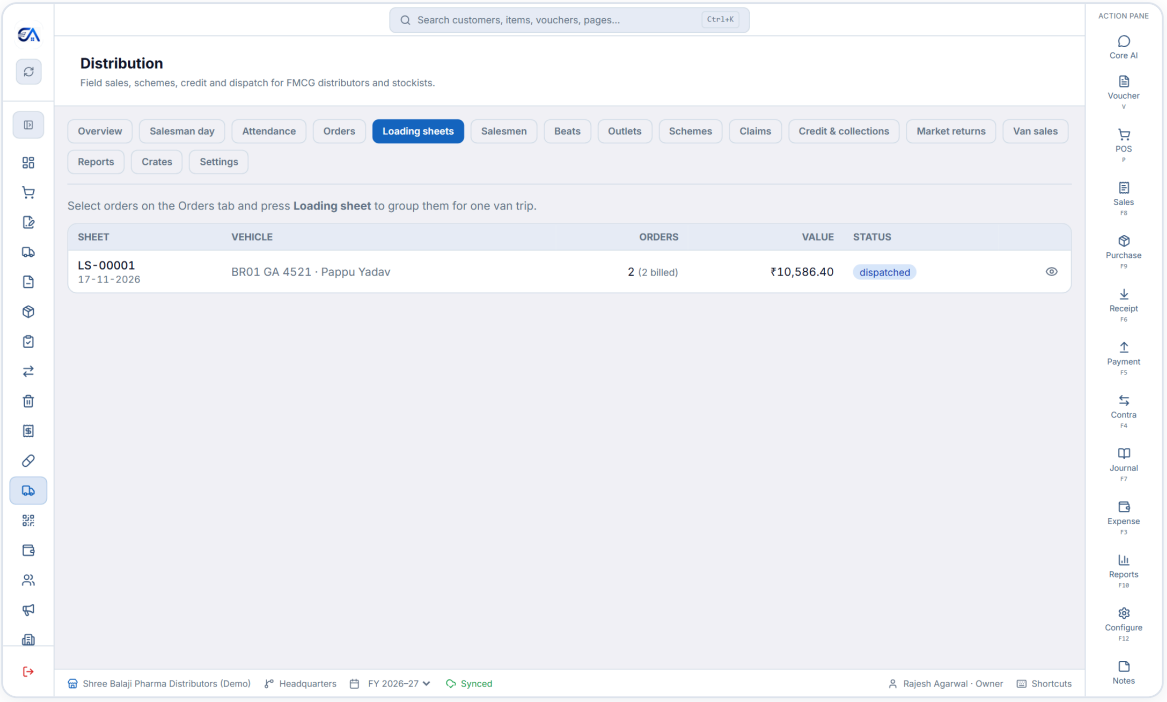


Figure — Loading sheets — LS-00001 for vehicle BR01 GA 4521

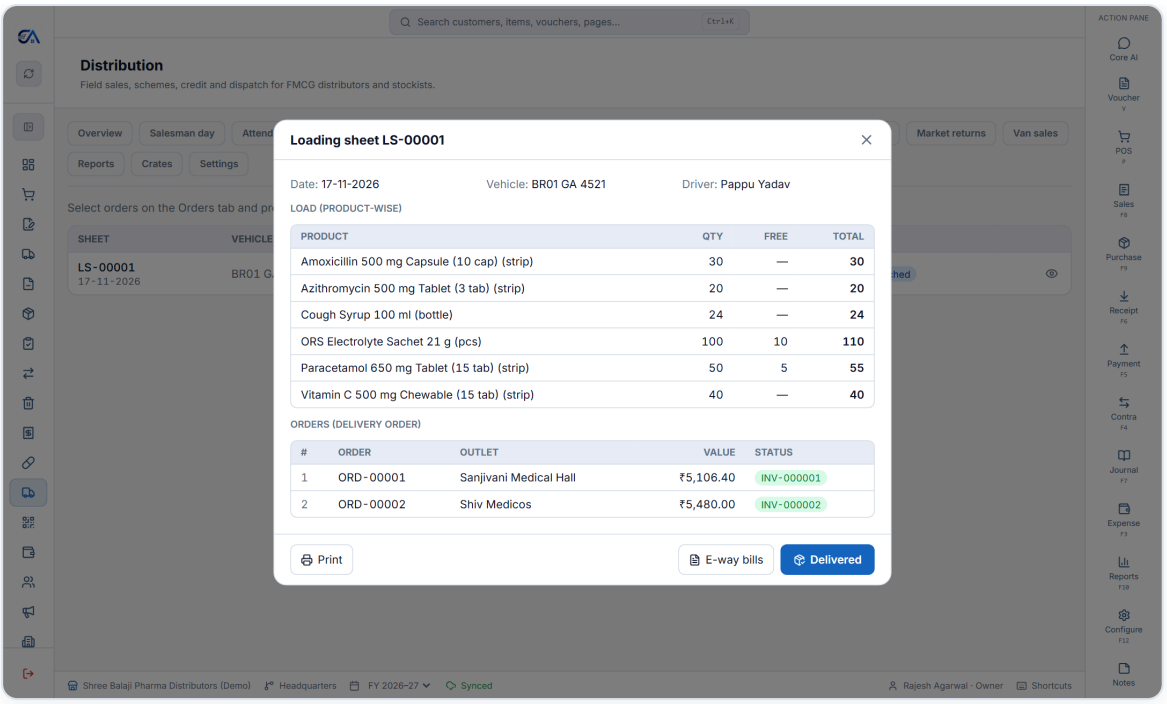


Figure — Loading sheet — product-wise load and the orders in delivery order

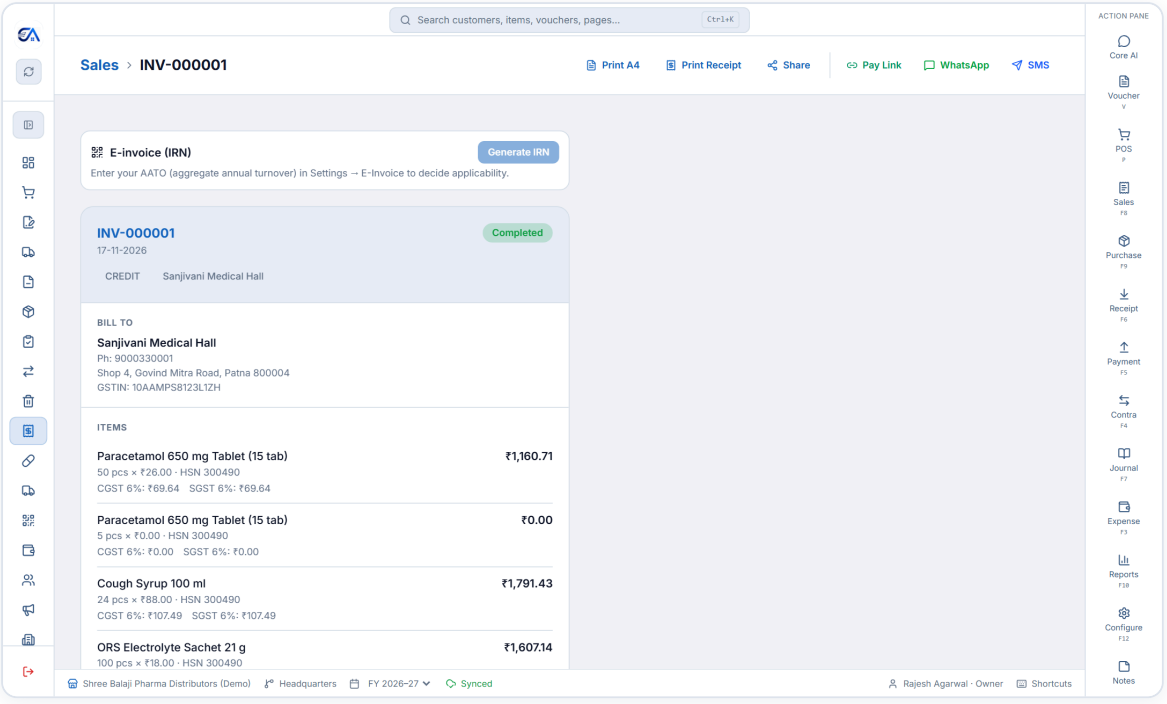


Figure — The GST bill — HSN, batch, CGST / SGST per line; scheme free goods at ₹0

CHAPTER 10

10 Delivery and Proof of Delivery

Record what actually reached the chemist, who received it, and take a signature or photo. Anything short comes back as a return automatically.

1. Open the billed order and click **Record delivery** (the MR or driver can do this on the app).
2. Change the **Delivered** quantity only where less reached the outlet; pick the condition — saleable, damaged or expired — and the reason.
3. Enter **Received by**, add a photo (stamped bill) and take the signature.
4. Click **Save delivery**. Short goods are booked back as a credit note: saleable stock returns to the shelf, damaged / expired goes to claims.

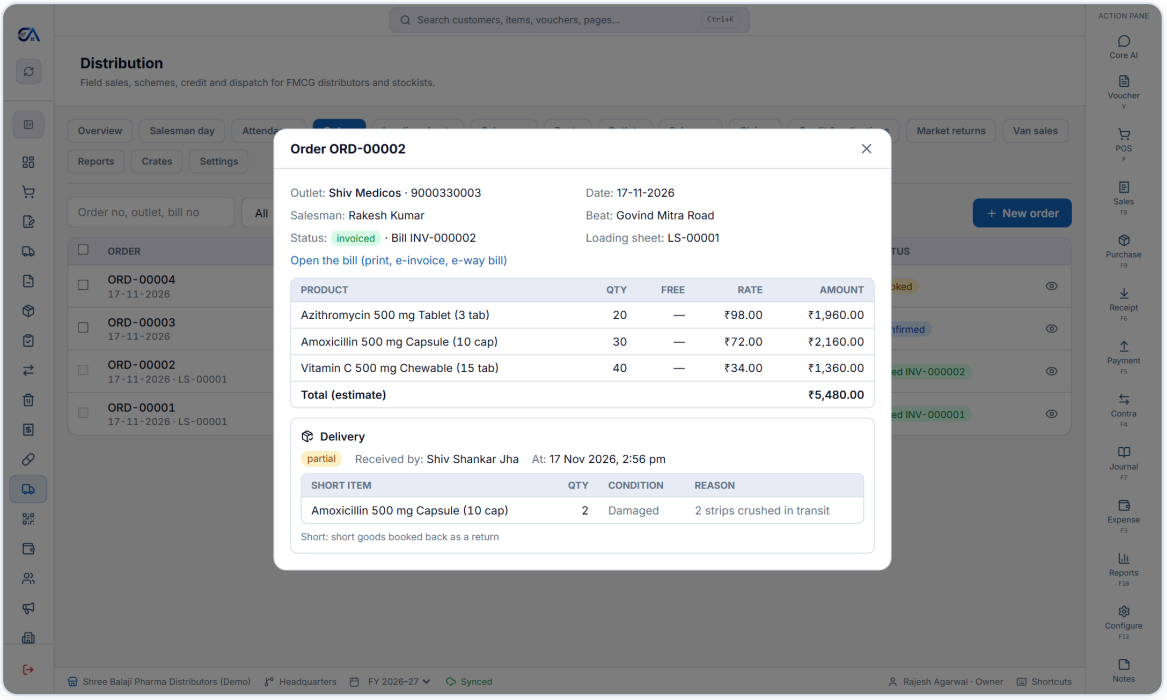


Figure — Delivery of ORD-00002 — 2 strips of Amoxicillin crushed in transit, booked back as a damaged return

CHAPTER 11

11 Credit Control and Collections

Every chemist has credit days and a credit limit. Collections from the field are checked by the office before they post.

Credit days and limit

1. Go to **Distribution → Credit & collections**. Untick **Overdue only** to see every outlet.
2. Click the pencil on an outlet to set its **credit days** and **credit limit**.

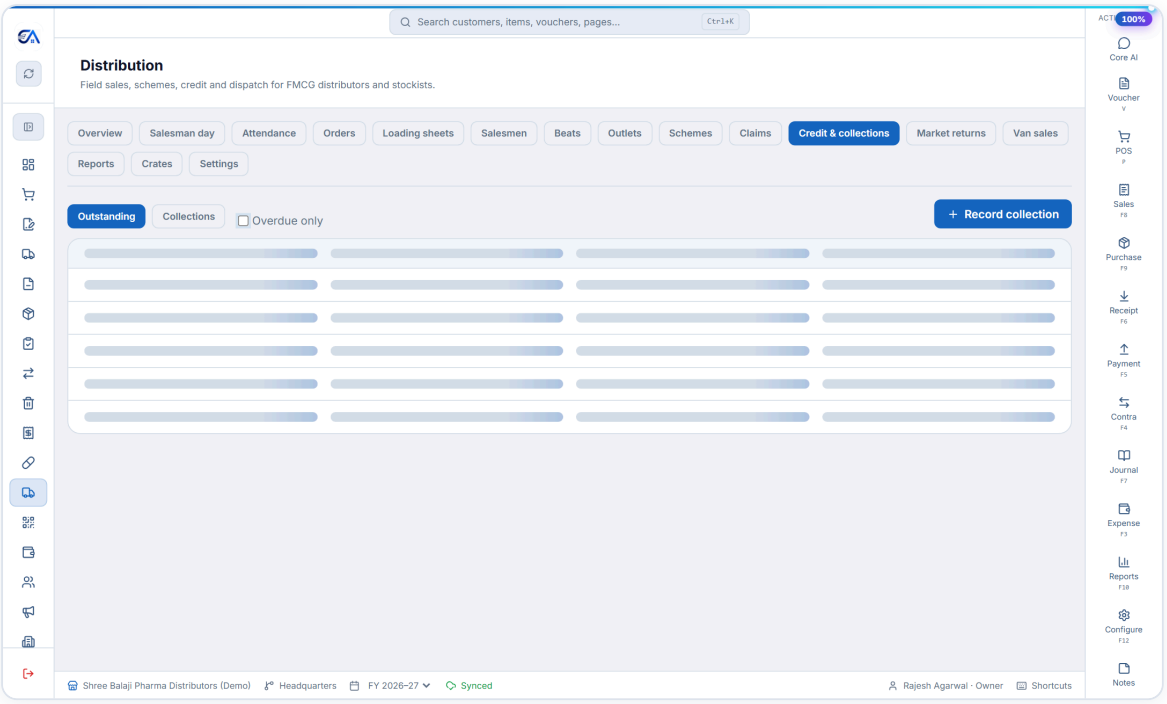


Figure — Outstanding per chemist, with credit terms, overdue amount and days late

Collect payment

1. Click **Collect** on the outlet (or the MR collects on the app).
2. Enter the amount and mode — **Cash**, **UPI** (with reference) or **Cheque** (number and cheque date).
3. The collection waits for the office. Count the cash / check the UPI and click ✓ **Accept** — the receipt posts to the chemist's ledger.
4. A cheque that bounces is marked **Bounced**; the amount goes back on the chemist's account.

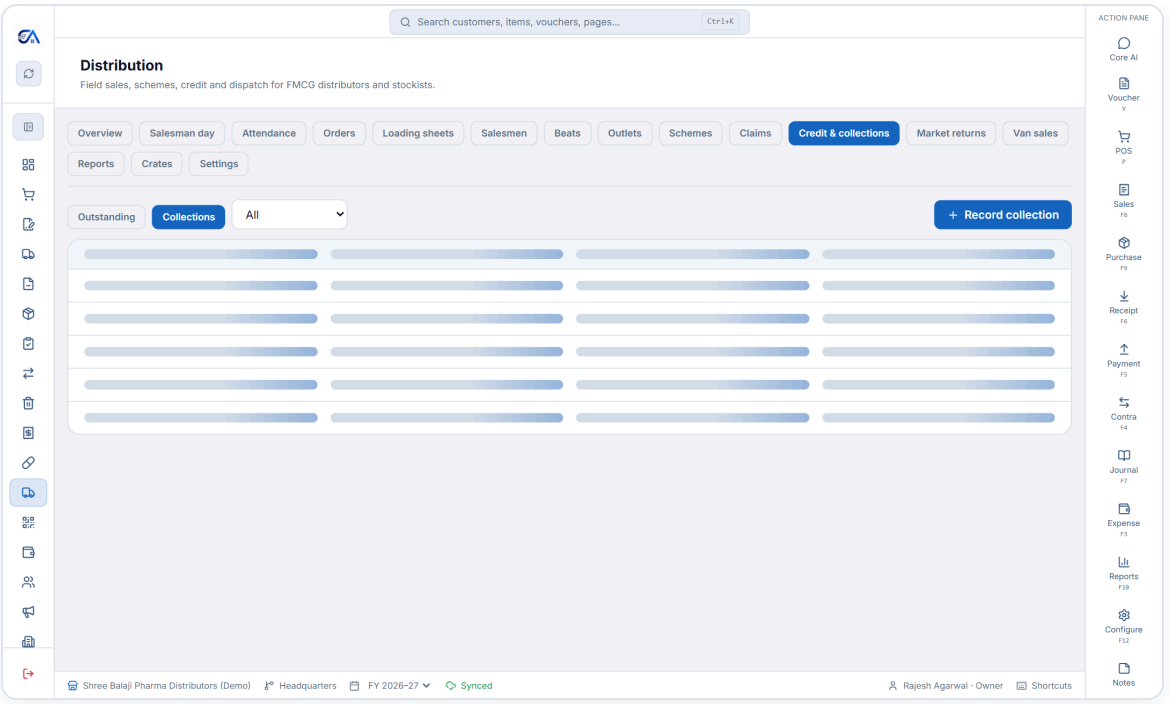


Figure — Collections — a UPI receipt accepted, a post-dated cheque pending

CHAPTER 12

12 Market Returns: Expiry and Breakage

Chemists return near-expiry, expired and broken stock. Saleable goods go back on the shelf; expired and damaged goods are written off and claimed from the company.

1. Go to **Distribution** → **Market returns** and pick the bill the goods came from.
2. Add each medicine, quantity, **condition** (saleable / damaged / expired), batch and expiry.
3. Save. A credit note is made for the chemist; stock and GST are reversed.

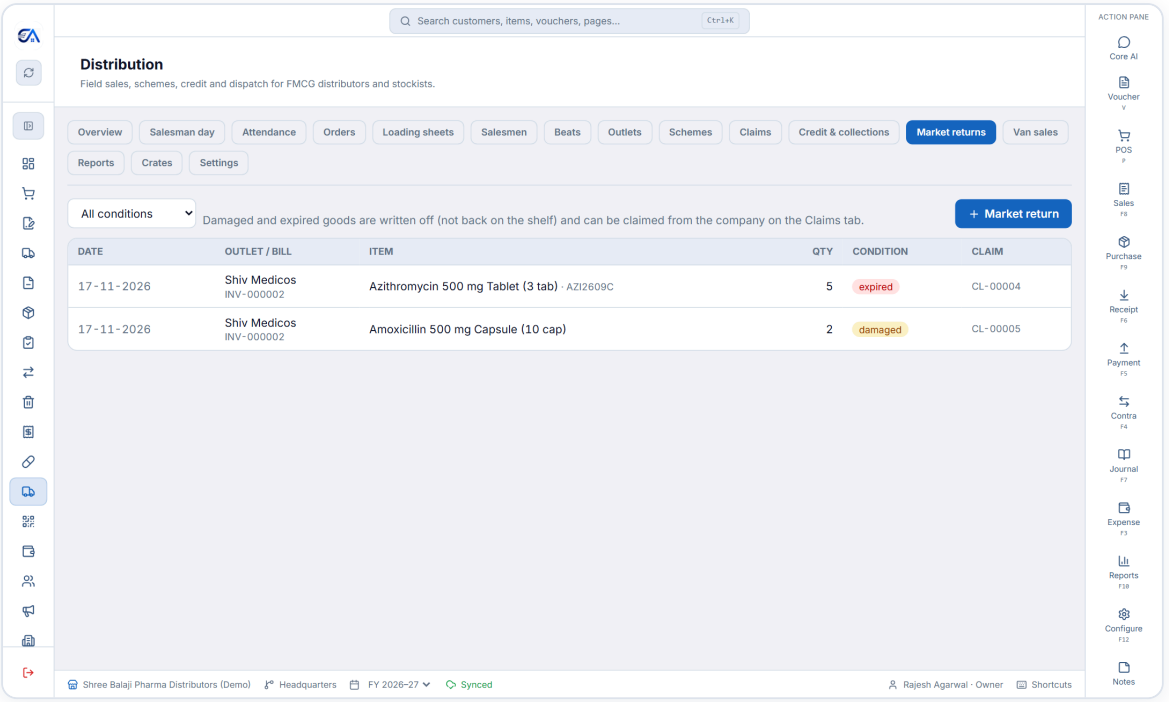


Figure — Market returns — Azithromycin batch AZI2609C returned near expiry by Shiv Medicos

CHAPTER 13

13 Claims to the Company

Claim the scheme free goods and discounts you gave, and the expired / damaged stock, from each company. When no company is picked, one claim is made per company.

1. Go to **Distribution → Claims**.
2. Click **Scheme claim**, pick the period and click **Make claim**.
3. Click **Expiry claim from returns** or **Damage claim from returns** for returned goods.
4. Open a claim to see each line (batch, expiry, quantity, rate), print it and send it to the company.
5. Mark it **Submitted**, then **Settled** with the amount the company passed — the accounting entry is made for you.

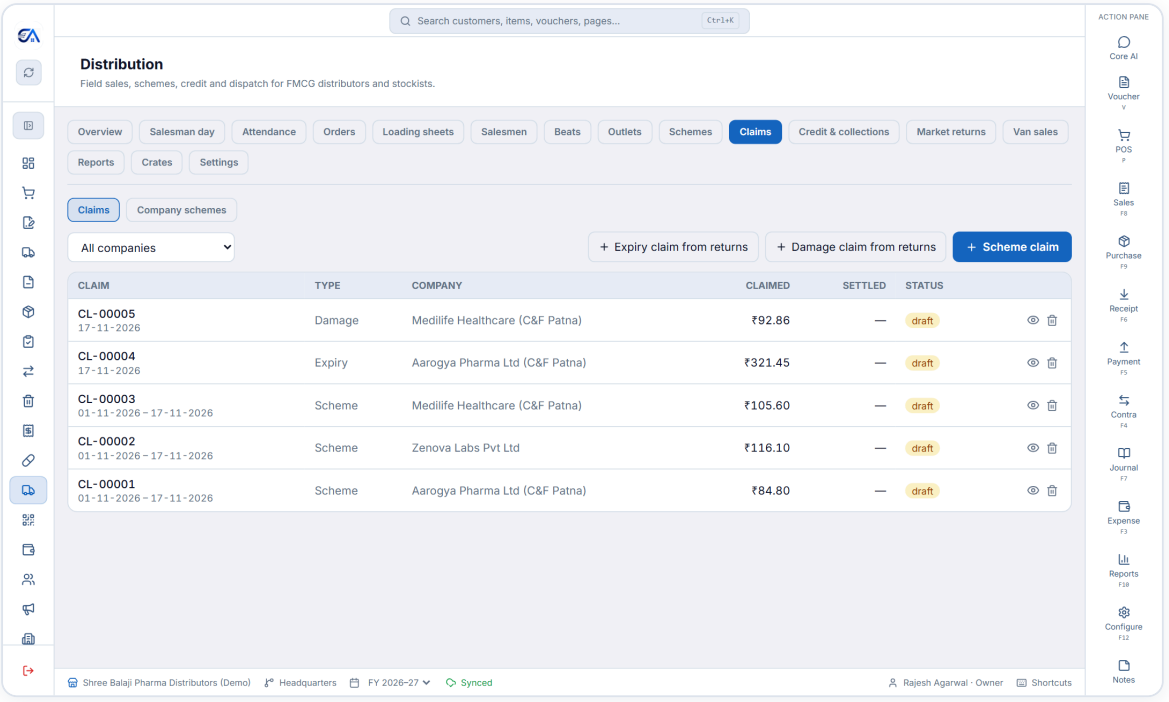


Figure — Claims — three scheme claims and expiry / damage claims, each to its own company

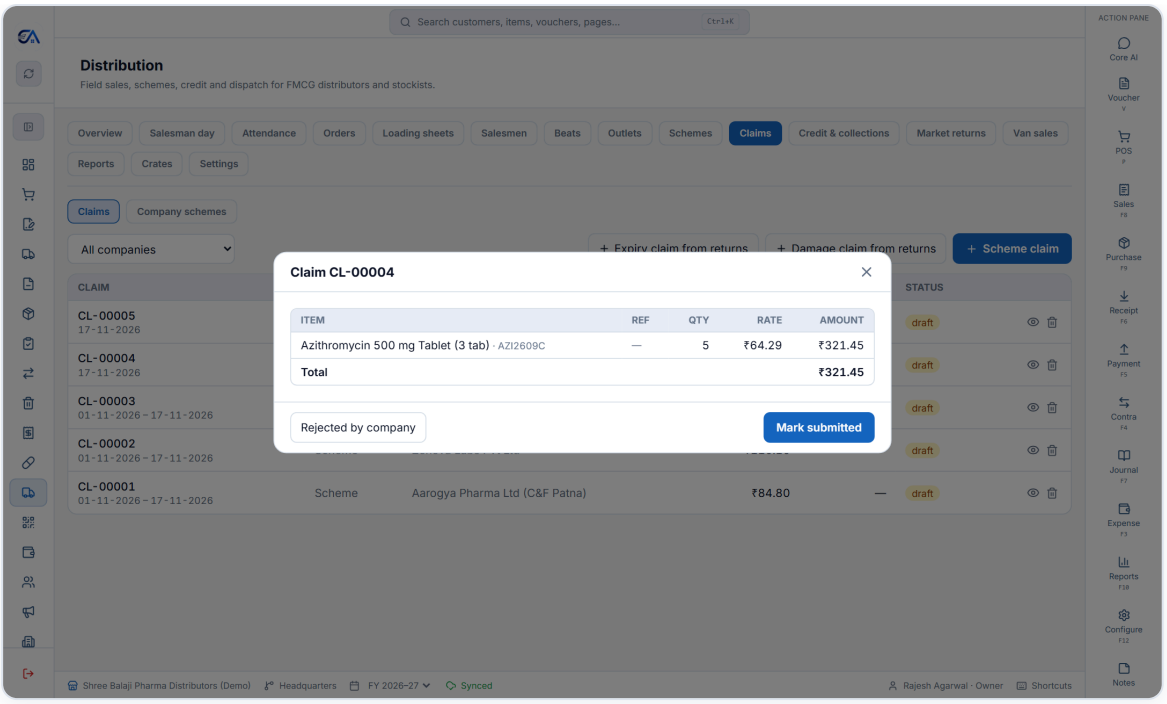


Figure — Expiry claim to Aarogya Pharma — batch and expiry on every line

CHAPTER 14

14 Reports, GST and Ledgers

Everything above posts by itself to stock, ledgers, GST and the FMCG reports. Nothing is entered twice.

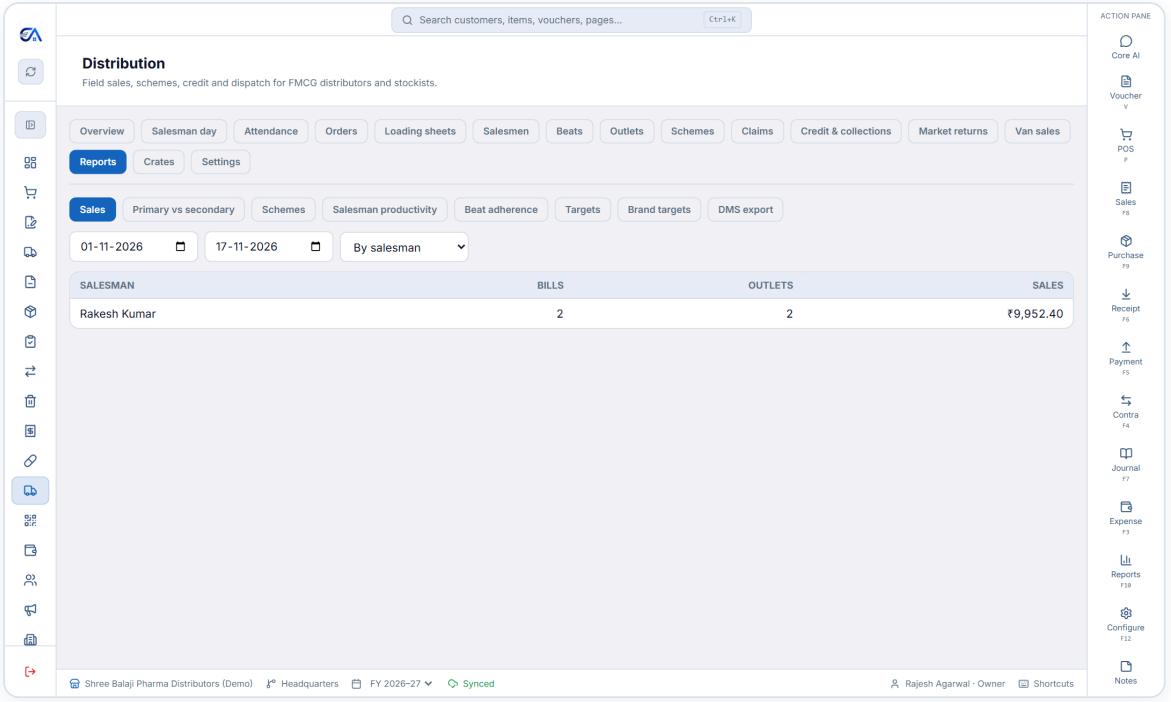


Figure — Distribution → Reports — sales by salesman, beat, outlet and brand; schemes; targets; DMS export

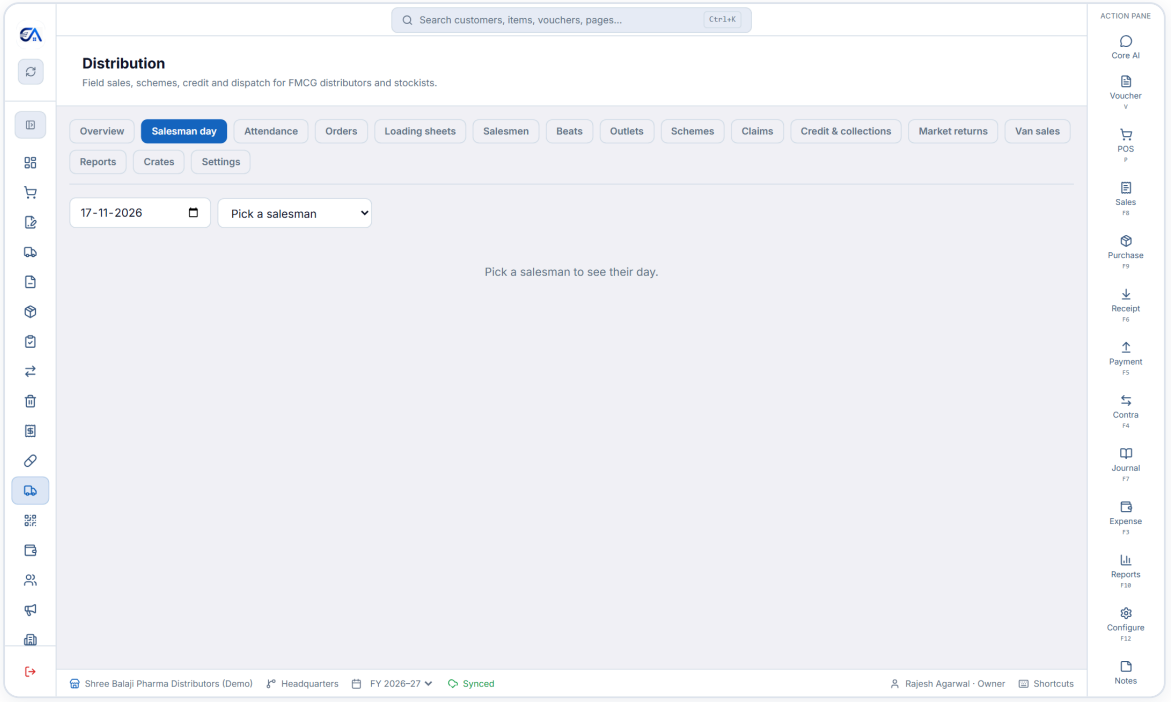


Figure — Salesman day — visits, orders and collections of each MR

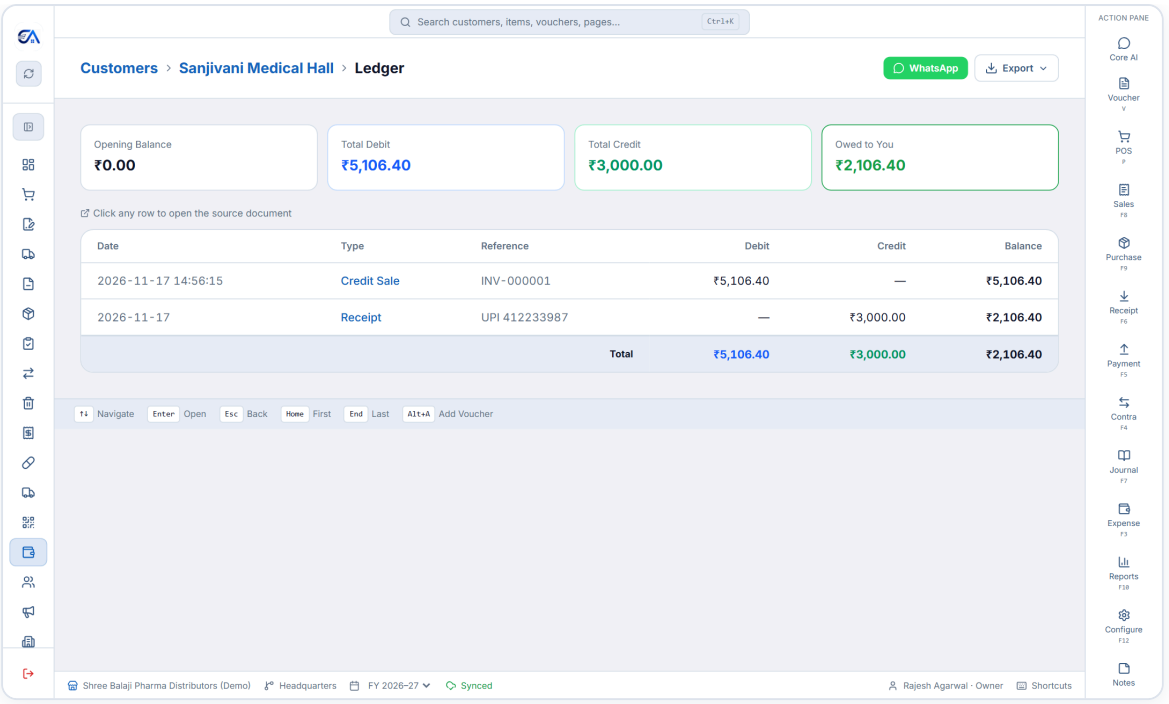


Figure — Chemist ledger — bills, returns and receipts with the running balance

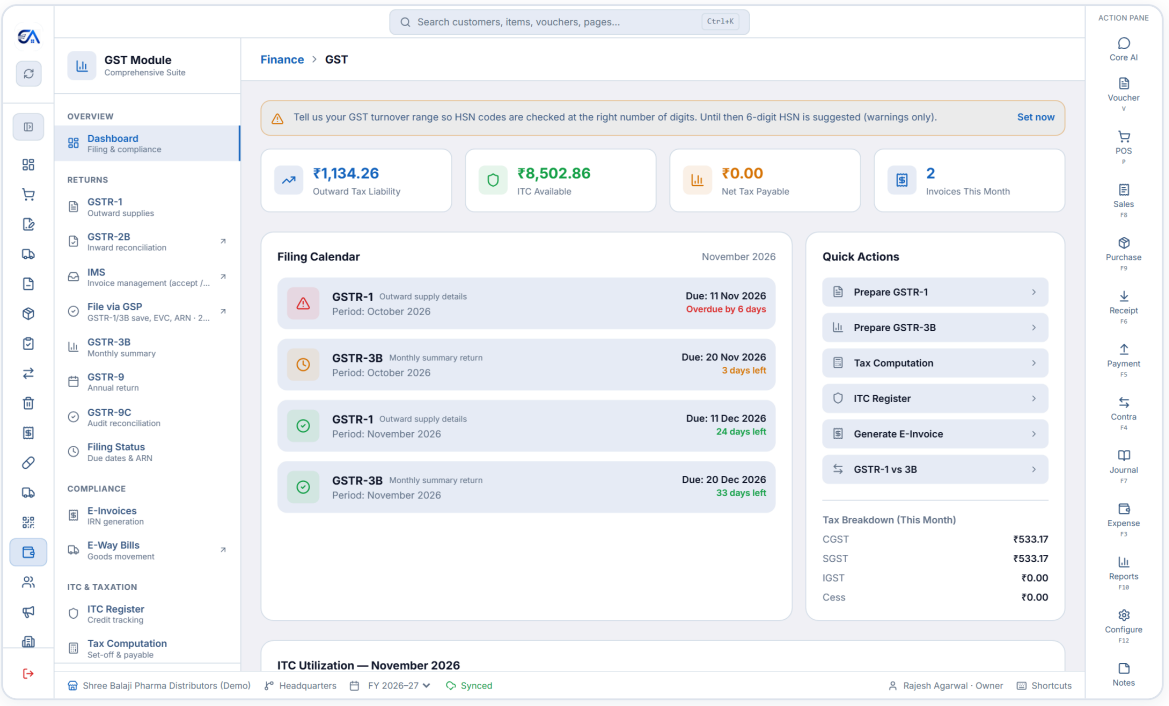


Figure — GST — output tax on bills, ITC from company purchases, GSTR-1 and GSTR-3B

Report	Where
Primary vs secondary sales	Distribution → Reports → Primary vs secondary
Scheme payout	Distribution → Reports → Schemes
MR target vs achievement	Distribution → Reports → Targets
Stock and near-expiry	Inventory, Pharmacy
GSTR-1 / GSTR-3B	Finance → GST

CHAPTER 15

15 Settings and the MR App

Rules for the field team are set once, in **Distribution → Settings**. All are off by default.

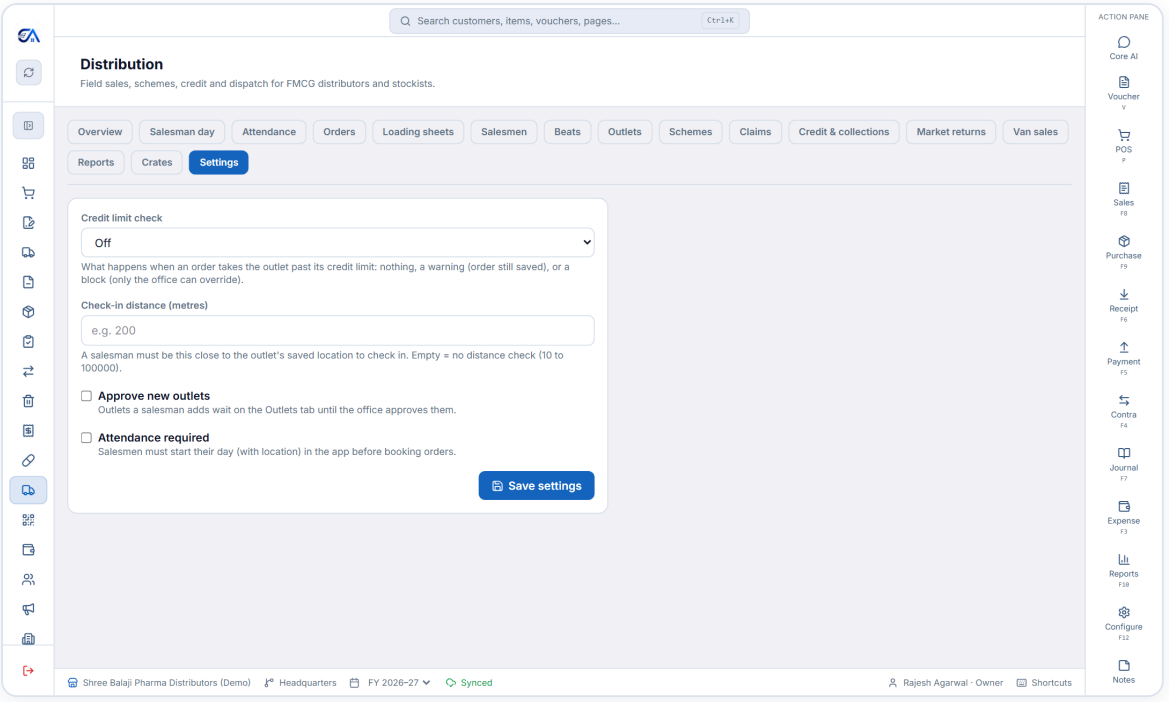


Figure — Distribution settings

Setting	What it does
Attendance	The MR must start the day (with location) before booking
Check-in radius	A visit counts only within the set distance of the shop
Outlet approval	Outlets added by MRs wait for the office
Credit limit at booking	Off, warn or block when an order crosses the limit

The MR's day on the app

1. Sign in on the CoreAxis ePOS Android app — it opens in **Salesman mode**.
2. Tap **Start day**. Today's beat and outlets are listed.
3. At each chemist: check in, book the order (schemes apply on the phone), collect payment, record delivery.
4. Without internet everything is saved on the phone and sent when the network returns.
5. Tap **End day**. The office sees the day in **Salesman day** and the cash handover in day close.

QUICK REFERENCE

Daily Checklist

Print this page and keep it at the dispatch desk.

Morning

1. Check today’s beats and MRs in Salesman day
2. Confirm yesterday’s booked orders
3. Make loading sheets and bill them

During the day

1. Dispatch vehicles and print loading sheets
2. Accept collections from MRs
3. Enter company invoices with batch and expiry

Evening

1. Record deliveries and short goods
2. Close the day for each MR (cash handover)
3. Check the outstanding and overdue list

Every month

1. Make scheme, expiry and damage claims
2. Review MR targets and primary vs secondary
3. Send GSTR-1 and GSTR-3B; return near-expiry stock to the company

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OFFICE
Samastipur, Bihar, India

All screenshots were taken from the CoreAxis ePOS web application using a test business, “Shree Balaji Pharma Distributors”, created for this guide. Company, chemist and medicine names, phone numbers and GSTINs are examples only. Screens may look slightly different depending on your version and settings. GST rates, HSN codes and drug schedules are examples — confirm them with your tax adviser and the drug licensing rules.