Working with TaxCore Free Pos

Now that you have met all the requirements, it's time to start using your TaxCore Free POS app:

1. [Managing Catalog Items]
   The **Catalog** section allows you to add new items to your list of

2. [Creating Invoices]
   When you have successfully added all your products/services to the

3. [Sharing Invoices]
   After you create an invoice, you can share it with your customer in

Managing Catalog Items

The **Catalog** section allows you to add new items to your list of products/services, as well as edit and delete the existing ones.

Adding items to catalog

To add new items, tap on the **Catalog** section and then select **Add item**.

Managing Catalog Items – Image of the catalog section

Fill in all mandatory fields - **Name** and **Unit Price**. Optionally, you can add the product's **EAN**.

NOTE:
If you are applying any discounts on the item(s) when creating an invoice, you must provide the unit price value after **all** discounts have been calculated and applied. To do this, you can either update the price of the existing catalog item or create an additional item with the calculated discounted price.

Next, you need to select the appropriate tax labels that apply to this item. Once you have finished, tap the tick symbol in the top right corner to save the new item.

NOTE:
You must check with the Inland Revenue Services which tax rates apply to the products and services in your catalog. The app doesn't apply the current tax rates automatically.

Managing Catalog Items – Image showing how to add a new item

When you save the item, it will appear on the list of items in your catalog.

Managing Catalog Items – Image showing the list of items in catalog

Editing items in the catalog

To edit an existing item, tap on  icon below the item's name.

Managing Catalog Items - Image of the edit icon

When the form opens, just edit the information and save the item.

Searching for items from the catalog

There are two ways of searching for items:

1. You can search from the **View Items** section. Just tap on the search symbol in the top-right corner.

Managing Catalog Items - Image of the search catalog items section

You can search for items by their Name or EAN code. The search result will appear as you type.

Managing Catalog Items - Image of the searching results

2. For a more advanced search, you can use the **Search Items** section. You can search the catalog by item name, unit price, EAN number or specific tax labels.

To see the results, just tap on the tick icon in the top-right corner.

Managing Catalog Items - Image of the searching catalog items via Search Items

Deleting items from the catalog

To delete an existing item, tap on icon below the item you wish to delete.

Managing Catalog Items - Image of deleting items from catalog

To complete the action, tap **Remove** in the confirmation box.

Managing Catalog Items - Image of confirming deleting items from catalog

Adding items to favorites

If you have items that are sold more often than others, you can add them to your favorites. This will enable you to add them to an invoice with just one tap (see [Creating Invoices](#)).

To add an item to favorites, tap on the star icon below the item's name. It will then turn into yellow.

- Creating Invoices

Managing Catalog Items - Image of adding catalog items to favorites

Related Articles

- Creating Invoices
- Sharing Invoices

Creating Invoices

When you have successfully added all your products/services to the Catalog, you are all set up to start issuing invoices. On initial use, there will be no invoices.

NOTE:
If you do not finish creating an invoice, and then you return to it after more than 15 minutes, you will see a warning message that the invoice creation started more than 15 min ago.

Steps for creating a new invoice

1. Tap on the **Invoice** section.

Creating Invoices - Image showing invoice option

2. Enter invoice items -- there are 4 ways to do this:

- Select an item from the existing list of items 
- Create a new item by using the **Add Item** option 
- Scan the product 's QR code by using your smartphone camera 
-

Tap on one of the favorite items (if you labeled some as favorites) in the top of the screen.

NOTE:
If you are applying any discounts on the item(s) when creating an invoice, you must provide the discounted unit price value, after **all** discounts have been calculated and applied. See Managing Catalog Items for more information.

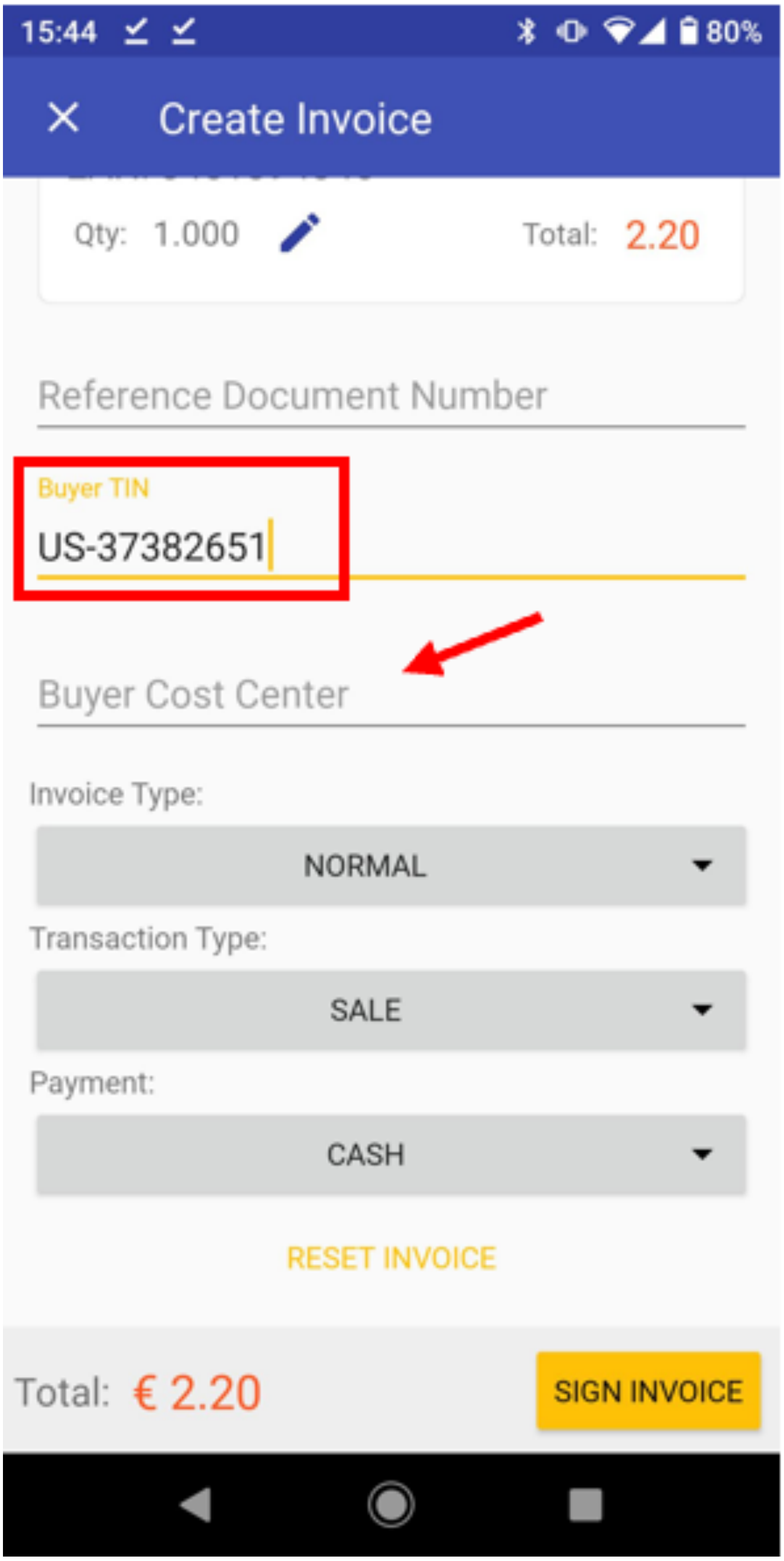
Creating Invoices - Image of the create invoice data options

If necessary, you can edit the quantity for each item by tapping on  icon or delete each item by tapping on

 icon.

Creating Invoices - Image of the delete and edit options

3. Enter **Reference Document Number** - mandatory only for *Copy* and *Refund* invoices. It represents the SDC invoice number of the original Normal Sale/Refund invoice which you are refunding or copying.
4. If you are creating a B2B invoice, you must provide a **Buyer TIN**. If you enter a Buyer TIN, an additional optional field will appear - **Buyer Cost Center**.



Creating Invoices - Image of the Buyer Cost Center

5. Select the **invoice type** *(Normal, Proforma, Copy* or *Training)* and the **transaction type** (Sale or Refund).

TaxCore Free POS supports all invoice types:

<u>Normal sale</u>: It applies to all goods and services sold to a customer or another business by any means of payment.

<u>Proforma</u>: Billing for payment before providing the service or product typically calls for a Pro forma invoice.

<u>Training</u>: This type is used only when it's necessary to train a cashier for operations in a real working environment. This type is monitored by your country's tax authority and will attract audit if you use it frequently.

Copy: Re-issuing of a Normal sale receipt.

Creating Invoices - Image showing the invoice type and transaction type

NOTE:
If you choose Refund or Copy, a warning will appear that the **Reference Document Number** field is mandatory.

![Creating Invoices 6.jpeg](/.attachments/Creating%20Invoices%206-be4ea8e0-80f4-4b82-9b32-

546fe670efda.jpeg)

Creating Invoices - Image showing the Ref no. mandatory in case of refund or copy

6. Select the **Payment** method: Cash, Card, Check, Wire Transfer, Voucher, MobileMoney or Other.
7. If you wish, you can cancel the transaction by clicking **Reset Invoice**.
8. Click **Sign Invoice** at the bottom of the screen.

Creating Invoices - Image of the Sign Invoice option

9. Provide a valid **PAC** (for V-SDC) or **PIN** (for E-SDC) to complete creating the invoice.

NOTE:
After providing a valid PAC or PIN the app will not ask to provide them again when creating new invoices for the next 15 minutes. After that, the memory is reset for safety reasons, and you will have to provide them again. Also, if you move the app into a background process on your device, the PAC or PIN will reset.

`| ![image.png?hash=222357170](/.attachments/image-a5335a38-55a9-4cc2-941b-ccc571961cfa.png?hash=222357170) | ![image.png?hash=222357170](/.attachments/image-2e070dfa-ab7e-4e25-93e5-dfb5983730d8.png?hash=222357170)| |--|--|`

Creating Invoices - Image of PAC and PIN signature

10. The invoice journal will appear on the screen, with sharing and printing options.

Creating Invoices - Image of a fiscal invoice

Related Articles

- Managing Catalog Items
- Sharing Invoices
- Creating a Refund Invoice
- Creating a Copy Invoice
- View Invoices

Sharing Invoices

After you create an invoice, you can share it with your customer in several ways.

NOTE:
Options for sharing invoices depend on the applications you installed on your device.

You can print it, share, or even save an invoice as a PDF file, by tapping on in the top right corner of an invoice journal.

Sharing Invoices - Image of the sharing options button

Related Articles

- Managing Catalog Items
- Creating Invoices