How to create a pending invoice for a customer?

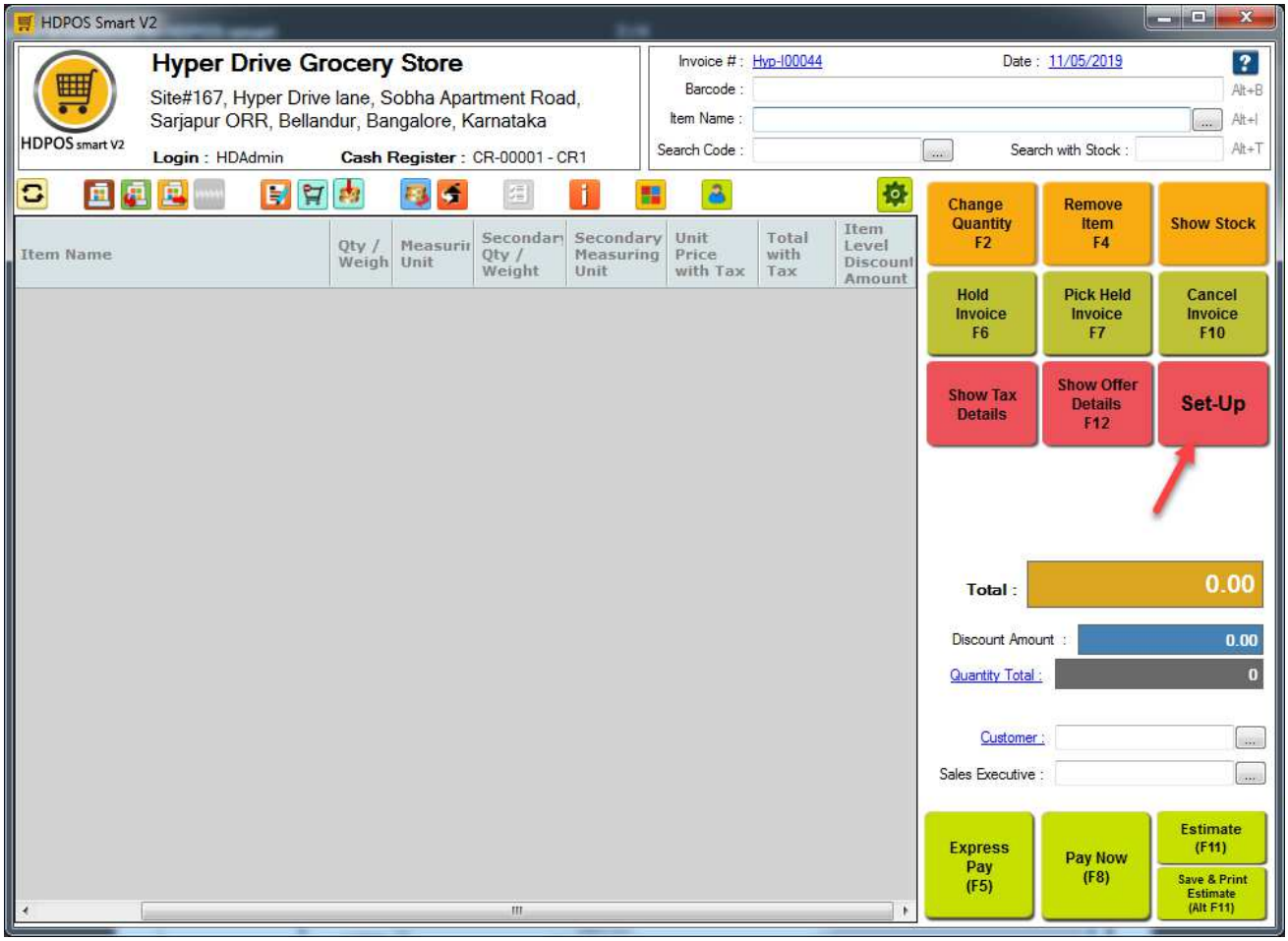
Sometimes in your business, customers will purchase items without making any payment and you will receive this pending payment from them later.

To create a pending invoice in HDPOS smart, follow the steps below.

- **Step 1: Create a customer with credit limit.**
- **Step 2: Make a pending sales invoice for that customer**.

Step 1:

1. Run **HDPOS smart**. From main invoice screen, click on **Set-Up**.



2. From 1st page, click on **Customer**. Click on **Add New Customer.**

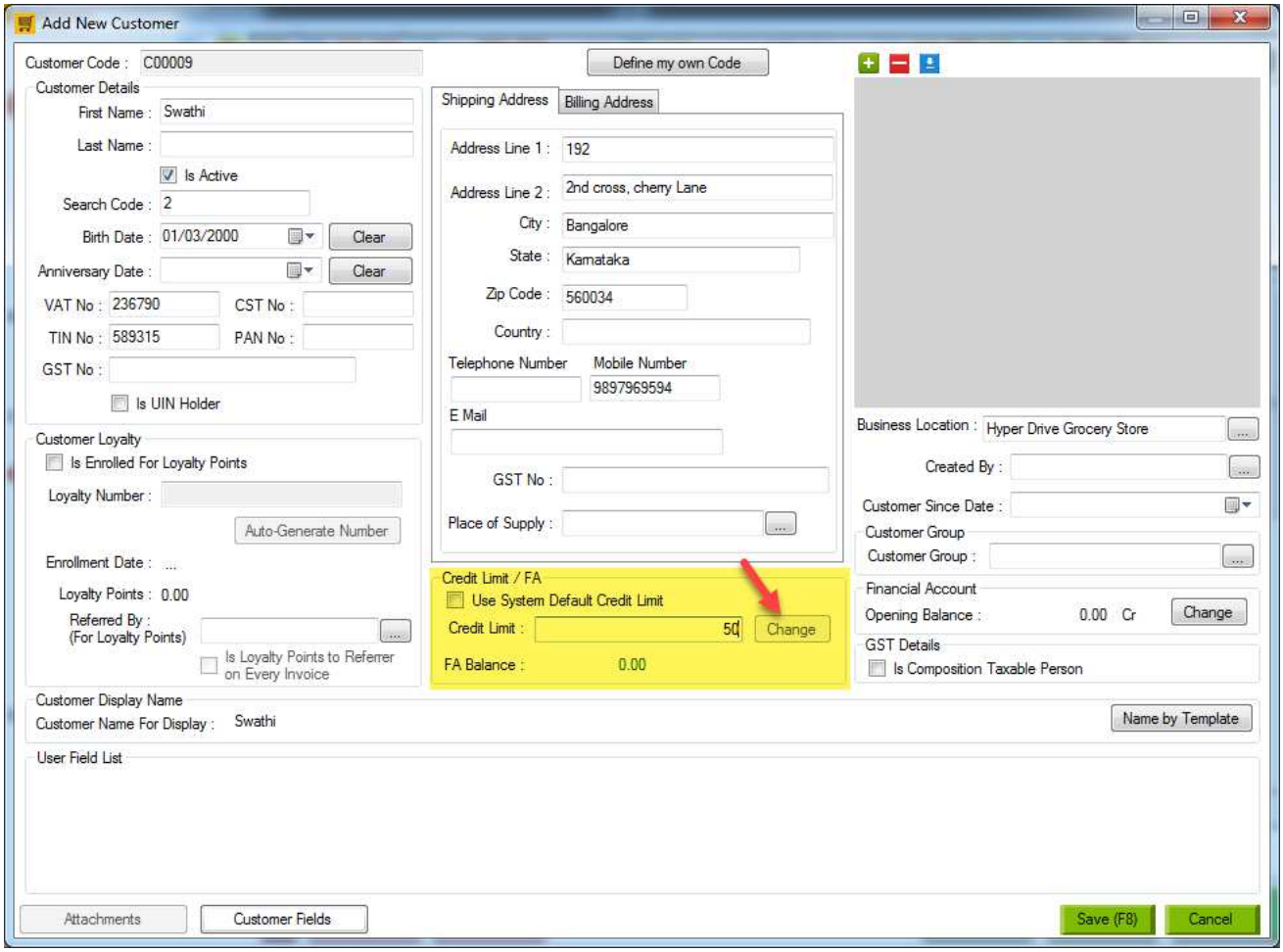


3. In **Add New Customer** screen, enter all required details.

- Uncheck the checkbox **Use System Default Credit Limit**.
- You will see **Change** button beside **Credit Limit** text box. Enter the value for credit limit.

Note: You cannot do a sales invoice for this customer beyond the credit limit.

- Click on **Save**.



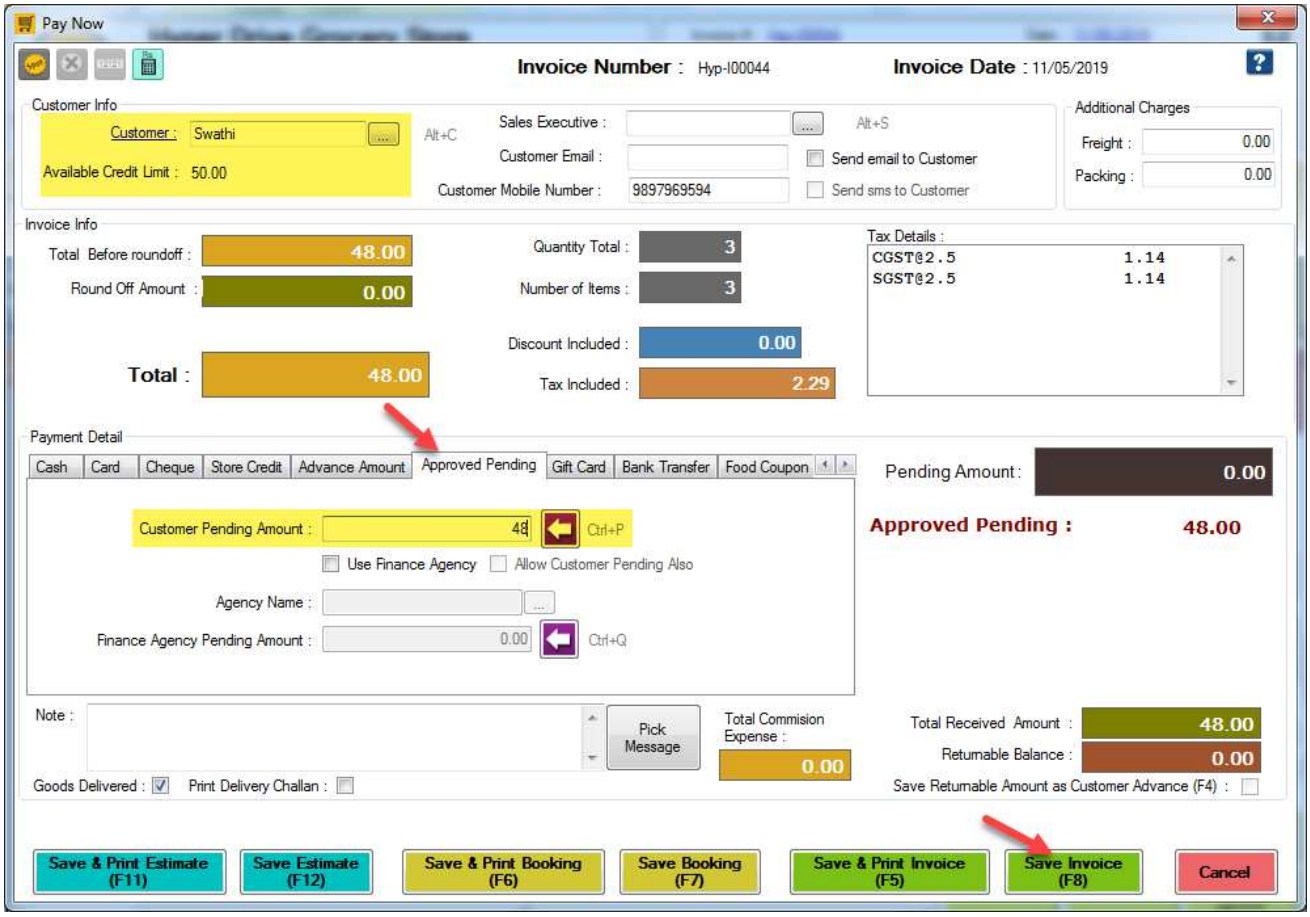
Step 2:

4. Go back to main screen. Select items for the invoice. Select the customer name.

5. Click on **Pay Now**. You can see the customer's credit limit in this screen.

6. From the **Payment Detail** section, select **Approved Pending**.

7. Enter the invoice amount. Click on **Save.**


Pay Now
Invoice Number : Hyp-I00044
Invoice Date : 11/05/2019
Customer Info
Customer : Swathi
Alt+C
Available Credit Limit : 50.00
Sales Executive :
Alt+S
Customer Email :
Send email to Customer
Customer Mobile Number : 9897969594
Send sms to Customer
Additional Charges
Freight : 0.00
Packing : 0.00
Invoice Info
Total Before roundoff : 48.00
Round Off Amount : 0.00
Total : 48.00
Quantity Total : 3
Number of Items : 3
Discount Included : 0.00
Tax Included : 2.29
Tax Details :
CGST@2.5 1.14
SGST@2.5 1.14
Payment Detail
Cash
Card
Cheque
Store Credit
Advance Amount
Approved Pending
Gift Card
Bank Transfer
Food Coupon
Customer Pending Amount : 48
Ctrl+P
Use Finance Agency
Allow Customer Pending Also
Agency Name :
Finance Agency Pending Amount : 0.00
Ctrl+Q
Pending Amount : 0.00
Approved Pending : 48.00
Note :
Pick Message
Total Commision Expense : 0.00
Total Received Amount : 48.00
Returnable Balance : 0.00
Save Returnable Amount as Customer Advance (F4) :
Goods Delivered :
Print Delivery Challan :
Save & Print Estimate (F11)
Save Estimate (F12)
Save & Print Booking (F6)
Save Booking (F7)
Save & Print Invoice (F5)
Save Invoice (F8)
Cancel