

How to get started with HDPOS smart?

Now that you have installed HDPOS smart, you would like to get started with the basics of working with the application.

In this document, you get familiar with -

- Logging in to HDPOS smart
- Create your shop (Business Location)
- Get familiar with the Invoice screen

Login to HDPOS smart -

This is the first step to getting started. Follow the steps given below to login to the application.

1. Double-click on HDPOS smart app icon on your desktop.
2. This will bring up the **Continue trial** screen giving you details of
 - Your Computer id
 - The number of days left in the trial.

Continue Trial



HDPOS smart V2

For single cash register

Thank you for trying HDPOSsmartV2.SA

You have "15" more days left to try this software. Your trial key expires on "20 Jun 2019".

Your Computer Id is : KEVEBZ6M1

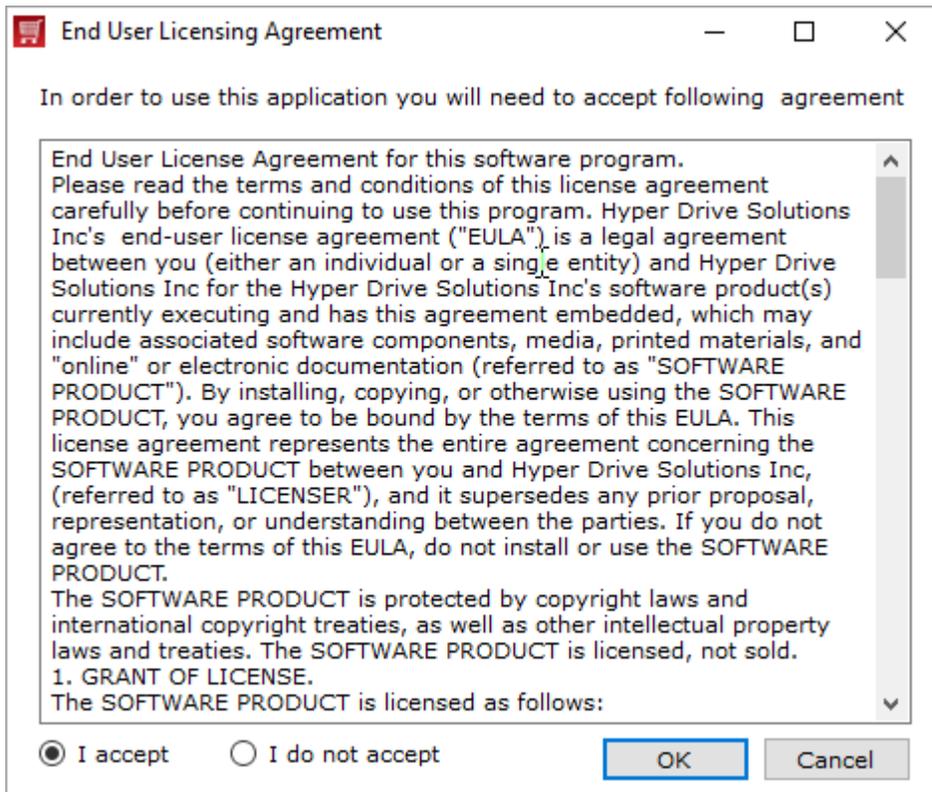
06 Jun 2019 20 Jun 2019

[Continue Trial](#) [Enter License Key](#)

Contact Us : Support@HyperDriveSolutions.com
Website : <https://www.HyperDriveSolutions.com>

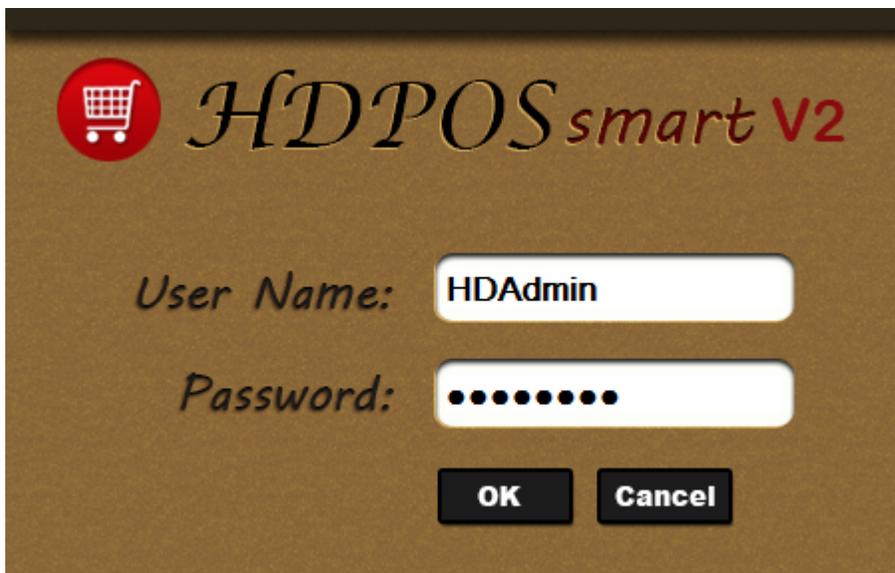
3. Click on **Continue Trial**.

4. Read the **End user license agreement** and Click on **I Accept** to accept the license agreement (You will see this screen only the first time to login to HDPOS smart).



5. Click on **OK**.

6. Application logs in with the default username and password.

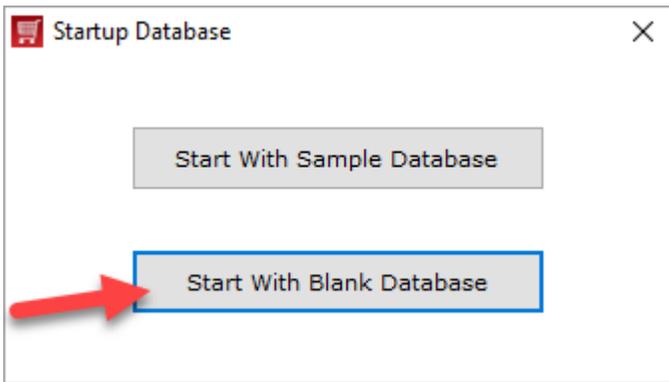


Note: HDPOS smart comes shipped with a default login -

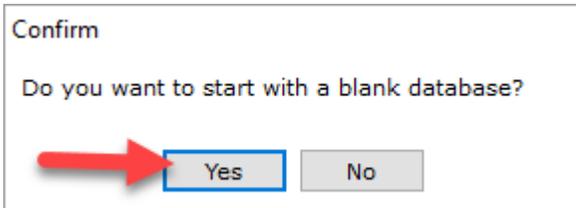
- Username: HDAdmin
- Password: @HDAdmin

7. Select a database.

- Click on **Start with blank database** to start with a new database.

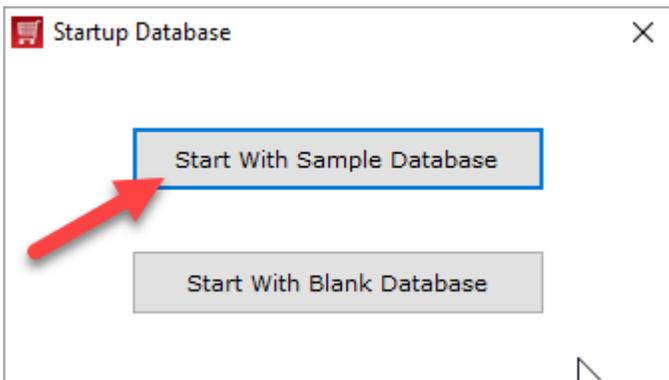


- Click on Yes in the confirmation message.



Note - If you choose to start with a new database, all the details such as the shop name, items, customers have to be entered manually.

- Click on **Start with sample database** to start with one of the sample databases.



- Choose the most relevant business type on the left panel.
- Select from available databases.
- Read description to understand what the database is about, and to check if that matches with your requirements.
- Select the download file – the one with **'bak'** file extension.
- Click on **Download and Apply**.

Sample Databases

Select Your Business Type

Business Type	Database Name	Sub Business Type	Language	Version	Last Updated Date
All Business Types	Appliances Store	Appliances Store	English	89	10/01/2019 03:06 PM
Agricultural Store					
Appliances Store					
Automobiles					
Book Store					
Computer Peripherals					
Dry Fruits Store					
Electrical Store					
Fabric Store					
Furniture Store					
Garment Store					
Gift Store					
Grocery Store					
Imitation Jewelry Store					
Mobile Phone Shop					
Optical Store					
Organic Store					
Paint Store					
Patanjali Store					
Pet Shop					

Total Records : 1

Description: Sample POS Database for managing Electrical and Electronics Appliances store. This HDPOS database is set up with multiple levels of categories to manage large number of items. Items in this database are set up to have serial number so that you manage AMC (Annual Maintenance Contract) . You can also check if the device is covered under warranty while taking it back for repairs. You can also see how AMC can be sold using HDPOS. This database also shows the settings for Financing agencies so that you can evaluate the functionality of taking payments from financing agencies like Bajaj Finance on behalf of your customers.

Downloads: Appliances Store.bak, Appliances Store.rar, Appliances Store.zip

Buttons: Download and Apply, Download Only, Browse..., Drag & Drop Database File Here From Local Computer

Buttons: Open Website, Close

f. While the database is downloaded and restored, progress bar is displayed.

Download in progress

Downloading the file, please wait...

g. Once complete, a message is displayed informing you the about the completion of the database restoration.

Restore Success

Database is restored successfully. You will need to now restart the application. Click OK button to close "HDPOSsmartV2.SA" now.

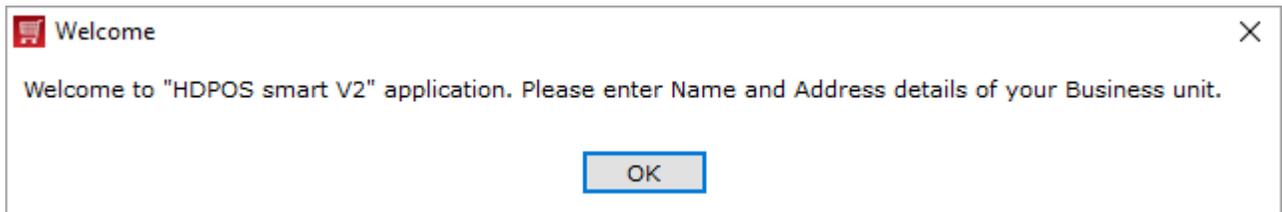
OK

h. Click on **OK** to restart the application.

Create your shop (Business Location) -

Shop or Business Location is the definition of your Physical location. You are required to create a business location before using the application if you started with a blank database.

1. The first time you login to HDPOS smart when you are starting with a blank database, you will be prompted with a message as shown below :



Click on **OK** to enter details of your shop.

2. Enter the details of your business location/shop as required.

A complex form titled "Add New Company" with a close button (X) and a help button (?) in the top right. The form is divided into several sections:

- Business Location Details:** Fields for Company Name (Hyper Drive Retail Pvt Ltd.), Shop Name (Hyper Drive Super Market), Prefix for Documents (Hyp), Start Number for all documents (00001), TIN Number (I0000001), Address Line 1 (Hyper Drive Lane, Green Glen Layout), Address Line 2 (Belandaru, Outer Ring Road), City (Bangalore), State (Karnataka), Country (India), Pin (560103), Phone No (080-4271700), Mobile No (9087678895), E Mail (support@hyperdrivesolutions.com), and Website (hyperdrivesolutions.com).
- Business Location TIN No:** Field with value L000004.
- ESIC No, LBT No, CST No, PT Registration No, Fax No, Service Tax No, GST No:** Empty fields.
- Term & Condition:** A large empty text area.
- Document Settings:** Includes Invoice Printer Settings, Printer Setting (Default_Laser), SMS Setting (Default), Enable Email (checked), Email Setting (Default), and Email Template Setting.
- Additional Receipt Settings:** Includes checkboxes for Print second receipt on different printer and Ask to print every time, Second Receipt Printer, Second Receipt Print Format, and Number of second receipts to print (1).
- Move Stock Setting:** Includes checkbox for Move stock of deleted invoices to a specified warehouse and Warehouse to keep stock of deleted invoices.
- File Setting:** Includes checkboxes for Save Invoice as File and Save Sales Return as File, each with Invoice Report Format and File Path Template fields.

At the bottom, there is an "Attachments" button and two main buttons: "Create (F8)" and "Cancel". A red arrow points to the "Create (F8)" button.

3. Click on **Create**.

Getting familiar with Invoice Screen -

On logging-in, the window that is displayed is the **main invoice screen**. All the billings are done here.

Here's a quick look list of areas in Main Screen that we will cover in this document :

- Name and address of your shop

- Item Selection
- View of Selected Items
- General Functionality Options
- Totals & Discounts
- Customer Details
- Sales Executive Details
- Tool bar Buttons
- Payment Options
- Offer Details

Name and Address of your shop -

The name and address of your shop is displayed on the top left corner of the window. Also, the cash register and the login being used is also displayed.

Item Selection -

You select the items for billing here. Items can be selected either by using item name, barcode, or search code.

HDPOS Smart V2
— □ ×



Hyper Drive Super Market
Hyper Drive Lane, Green Glen Layout, Belanduru, Outer Ring Road, Bangalore, Karnataka, 560103.

HDPOS smart V2 Login : HDAdmin Cash Register : 01 - Manager's Drawer

Invoice #: Hyp-100001 Date : 10/06/2019 ?

Barcode :

Item Name :

Search Code : Search with Stock :

S No.	Barcode	Item Name	Qty / Weight	Measuring Unit	Unit Price with Tax	Total with Tax
1	T00001	Fresh Onion	1	Kg	30.00	30.00
2	T00004	Nandhini Pure Ghee	1	Qty	400.00	400.00
3	T00003	Royal Cardamom, 100gm	1	Qty	50.00	50.00
4	T00002	Sugar, 500gm Pack	1	Qty	45.00	45.00

Change Quantity F2

Remove Item F4

Show Stock

Hold Invoice F6

Pick Held Invoice F7

Cancel Invoice F10

Show Tax Details

Show Offer Details F12

Set-Up

Total : 525.00

Discount Amount : 0.00

Quantity Total : 4

Customer :

Sales Executive :

Express Pay (F5)

Pay Now (F8)

Estimate (F11)

Save & Print Estimate (Alt F11)

View of Selected Items -

The items that are scanned for billing are displayed here.

HDPOS Smart V2

Invoice # : [Hyp-100001](#)
Date : [10/06/2019](#)

Hyper Drive Super Market

Hyper Drive Lane, Green Glen Layout, Belanduru, Outer Ring Road, Bangalore, Karnataka, 560103.

HDPOS smart V2 Login : HDAdmin Cash Register : 01 - Manager's Drawer

Alt+B
 Alt+I
 ... Search with Stock : Alt+T

S No.	Barcode	Item Name	Qty / Weight	Measuring Unit	Unit Price with Tax	Total with Tax
1	T00001	Fresh Onion	1	Kg	30.00	30.00
2	T00004	Nandhini Pure Ghee	1	Qty	400.00	400.00
3	T00003	Royal Cardamom, 100gm	1	Qty	50.00	50.00
4	T00002	Sugar, 500gm Pack	1	Qty	45.00	45.00

Change Quantity
F2

Remove Item
F4

Show Stock

Hold Invoice
F6

Pick Held Invoice
F7

Cancel Invoice
F10

Show Tax Details

Show Offer Details
F12

Set-Up

Total : 525.00

Discount Amount : 0.00

Quantity Total : 4

Customer :

Sales Executive :

Express Pay
(F5)

Pay Now
(F8)

Estimate
(F11)

Save & Print Estimate
(Alt F11)

General Functionality Options -

You can perform numerous operations on the invoice being created, such as changing the quantity of an item added for invoicing, cancelling the invoice, etc., using the 9 general functionality buttons.

HDPOS Smart V2

Hyper Drive Super Market
Hyper Drive Lane, Green Glen Layout, Belanduru, Outer Ring Road, Bangalore, Karnataka, 560103.

HDPOS smart V2 Login : HDAdmin Cash Register : 01 - Manager's Drawer

Invoice #: Hyp-100001 Date : 10/06/2019

Barcode : Alt+B

Item Name : Alt+I

Search Code : Search with Stock : Alt+T

S No.	Barcode	Item Name	Qty / Weight	Measuring Unit	Unit Price with Tax	Total with Tax
1	T00001	Fresh Onion	1	Kg	30.00	30.00
2	T00004	Nandhini Pure Ghee	1	Qty	400.00	400.00
3	T00003	Royal Cardamom, 100gm	1	Qty	50.00	50.00
4	T00002	Sugar, 500gm Pack	1	Qty	45.00	45.00

Change Quantity F2

Remove Item F4

Show Stock

Hold Invoice F6

Pick Held Invoice F7

Cancel Invoice F10

Show Tax Details

Show Offer Details F12

Set-Up

Total : 525.00

Discount Amount : 0.00

Quantity Total : 4

Customer :

Sales Executive :

Express Pay (F5)

Pay Now (F8)

Estimate (F11)

Save & Print Estimate (Alt F11)

- **Change Quantity (F2):** This option allows you to change quantity of the selected item.
- **Remove Item (F4):** Clicking on this button will remove the selected item from the invoice screen.
- **Show Stock:** Clicking on this button, the stock of the item in all warehouse/warehouses is displayed for the selected item.
- **Hold Invoice (F6):** Clicking on this button will put the invoice in held state. You can create one or more invoices, and later continue billing with the held invoice.
- **Pick Held Invoice (F7):** This allows you to 'pick' one of the held invoices and continue billing with that.
- **Cancel Invoice (F10):** Clicking on this button will cancel the ongoing invoice.
- **Show Tax Details:** Columns with tax details of the items in the invoice are displayed on clicking this button.
- **Hide offer details (F12):** All applicable and the applied offers are displayed in the **offers** section in the lower part of the screen. To hide this section, click on this button. Clicking on this will replace the button with **Show Offer Details**, clicking on which will again display the section.
- **Setup:** Clicking on this button takes you to the setup window, where all the administrative tasks are performed.

Totals and Discounts -

This section of the main invoice screen provides the details about the total amount of the invoice, the discount included and the total quantity of all items in the invoice.

Total : 525.00

Discount Amount : 0.00

Quantity Total : 4

- **Total:** The grand total of invoice after the application of discounts, and inclusive of tax.
- **Discount included.** This shows the total discount amount included in the invoice.
- **Quantity Total:** This displays the total quantities/pieces of the items being invoiced.

Customer Details -

The customer selected for the invoice is displayed in the bottom right section of the window.

Hyper Drive Super Market
Hyper Drive Lane, Green Glen Layout, Belanduru, Outer Ring Road, Bangalore, Karnataka, 560103.
Login : HDAdmin Cash Register : 01 - Manager's Drawer

Invoice #: Hyp-100001 Date : 10/06/2019

S No.	Barcode	Item Name	Qty / Weight	Measuring Unit	Unit Price with Tax	Total with Tax
1	T00001	Fresh Onion	1	Kg	30.00	30.00
2	T00004	Nandhini Pure Ghee	1	Qty	400.00	400.00
3	T00003	Royal Cardamom, 100gm	1	Qty	50.00	50.00
4	T00002	Sugar, 500gm Pack	1	Qty	45.00	45.00

Summary:
Total : 525.00
 Discount Amount : 0.00
 Quantity Total : 4

Customer:

Sales Executive :

You can select any of the customers defined in customer manager using name, mobile number, or customer code. Additionally, you can click on '+' to add a new customer.

Selecting customers allow you to keep track of the sales made to a customer, provide store credits against returns, if any, and also provide items on credit. You can also provide loyalty points to customers if required.

HDPOS also allows for sending email and SMS to customers on creation of invoices. Specifying customers will ease the process by automatically selecting the mobile number and email for SMS and email respectively.

Sales Executive Details -

In Sales executive section, you can select employees. They can be selected to calculate the commission earned by the executive with that sale, or simply to keep track of the sales done by your employees.

Hyper Drive Super Market
 Hyper Drive Lane, Green Glen Layout, Belanduru, Outer Ring Road, Bangalore, Karnataka, 560103.
 Login : HDAdmin Cash Register : 01 - Manager's Drawer

Invoice #: Hyp-100001 Date : 10/06/2019

Barcode : Alt+B
 Item Name : Alt+I
 Search Cgde : Search with Stock : Alt+T

S No.	Barcode	Item Name	Qty / Weight	Measuring Unit	Unit Price with Tax	Total with Tax
1	T00001	Fresh Onion	1	Kg	30.00	30.00
2	T00004	Nandhini Pure Ghee	1	Qty	400.00	400.00
3	T00003	Royal Cardamom, 100gm	1	Qty	50.00	50.00
4	T00002	Sugar, 500gm Pack	1	Qty	45.00	45.00

Total : 525.00
 Discount Amount : 0.00
 Quantity Total : 4

Customer :
Sales Executive :

You can specify which of your employees can be selected as sales executives, thus keeping the restricting of the employees from being selected in this section. This can be done while defining/creating an employee in HDPOS.

Although the sales executive shown here is selected for the whole of the invoice, settings can be changed to allow for selection of different sales executives per item. The sales commission is calculated based on the commission percentage defined while creating an employee. The commission thus allowed to the employee will be credited to his/her account in HDPOS only upon successful payment against the invoice.

Toolbar Buttons -

There are several buttons in the toolbar that allows you to perform different tasks, both on the invoice- such as allowing a discount, and on other documents, such as creating a cash transfer.

HDPOS Smart V2

Hyper Drive Super Market
Hyper Drive Lane, Green Glen Layout, Belanduru, Outer Ring Road, Bangalore, Karnataka, 560103.
Login : HDAdmin **Cash Register** : 01 - Manager's Drawer

Invoice #: [Hyp:100001](#) Date: [10/06/2019](#)

Barcode: Alt+B
Item Name: Alt+I
Search Cgde: Search with Stock: Alt+T

S No.	Barcode	Item Name	Qty / Weight	Measuring Unit	Unit Price with Tax	Total with Tax
1	T00001	Fresh Onion	1	Kg	30.00	30.00
2	T00004	Nandhini Pure Ghee	1	Qty	400.00	400.00
3	T00003	Royal Cardamom, 100gm	1	Qty	50.00	50.00
4	T00002	Sugar, 500gm Pack	1	Qty	45.00	45.00

Change Quantity F2 **Remove Item F4** **Show Stock**

Hold Invoice F6 **Pick Held Invoice F7** **Cancel Invoice F10**

Show Tax Details **Show Offer Details F12** **Set-Up**

Total : **525.00**

Discount Amount : **0.00**

Quantity Total : **4**

Customer : ...

Sales Executive : ...

Express Pay (F5) **Pay Now (F8)** **Estimate (F11)**
Save & Print Estimate (Alt F11)

Some of the most commonly used buttons are made available in the toolbar by default. You can configure the toolbar, i.e., you can add or remove buttons from the toolbar by clicking on the **manage** toolbar button.

HDPOS Smart V2

Hyper Drive Super Market
Hyper Drive Lane, Green Glen Layout, Belanduru, Outer Ring Road, Bangalore, Karnataka, 560103.

Invoice #: [Hyp-100001](#) Date: [10/06/2019](#)

Barcode: Alt+B
Item Name: Alt+I
Search Code: Search with Stock: Alt+T

HDPOS smart V2 Login: HDAdmin Cash Register: 01 - Manager's Drawer

S No.	Barcode	Item Name	Qty / Weight	Measuring Unit	Unit Price with Tax	Total Tax
1	T00001	Fresh Onion	1	Kg	30.00	30.00
2	T00004	Nandhini Pure Ghee	1	Qty	400.00	400.00
3	T00003	Royal Cardamom, 100gm	1	Qty	50.00	50.00
4	T00002	Sugar, 500gm Pack	1	Qty	45.00	45.00

Total: 525.00
Discount Amount: 0.00
Quantity Total: 4

Customer:
Sales Executive:

Some of the toolbar buttons and their functions are as follows :

- **Current Cash Register Amount** – Select this option to know the available cash in the selected Cash register. You can also see the amount of Card, food coupons, and Cheque transactions.
- **Cash Transfer** – This option allows you to quickly transfer cash from your current cash register to another cash register of the same business location.
- **Change Cash Register** – Select this option when you want to change the currently selected cash register.
- **Sales Invoice** – Clicking on this button will display all the Sales invoices created in the logged-in business location.
- **Receive Payments** – This allows you to create a 'receive payment' document where you receive payment from customers against pending invoices, or as advance amounts.
- **Add Spot Discount** – This functionality allows you to provide discounts either on specific items of the invoice, or on the invoice as a whole. You can provide discounts as flat amounts or allow a percentage discount.

Payment options -

HDPOS smart allows you to receive payments in numerous payment modes that includes, but not limited to cash, card, food coupons, cheques, etc.. In order to receive payments and save the ongoing invoice, you can use any one of the payment options – **Express Pay**, or **Pay Now**.

HDPOS Smart V2

Hyper Drive Super Market
Hyper Drive Lane, Green Glen Layout, Belanduru, Outer Ring Road, Bangalore, Karnataka, 560103.
Login : HDAdmin Cash Register : 01 - Manager's Drawer

Invoice #: Hyp-100001 Date : 10/06/2019 ?

Barcode : Alt+B
Item Name : Alt+I
Search Code : Search with Stock : Alt+T

S No.	Barcode	Item Name	Qty / Weight	Measuring Unit	Unit Price with Tax	Total with Tax
1	T00001	Fresh Onion	1	Kg	30.00	30.00
2	T00004	Nandhini Pure Ghee	1	Qty	400.00	400.00
3	T00003	Royal Cardamom, 100gm	1	Qty	50.00	50.00
4	T00002	Sugar, 500gm Pack	1	Qty	45.00	45.00

Change Quantity F2 Remove Item F4 Show Stock
Hold Invoice F6 Pick Held Invoice F7 Cancel Invoice F10
Show Tax Details Show Offer Details F12 Set-Up

Total : **525.00**

Discount Amount : **0.00**
Quantity Total : **4**

Customer : ...
Sales Executive : ...

Express Pay (F5) Pay Now (F8) Estimate (F11)
Save & Print Estimate (Alt F11)

- **Express pay (F5):** This button is used for quick billing. Clicking on this button will save the invoice with cash payment and print the invoice. This can be configured in settings to accept either cash or card as payment modes, and specify to either print the invoice or not after saving.
- **Pay Now (F8):** Clicking on this button will display the 'Pay Now' window where you can specify amounts collected against different modes of payments such as cash, card, etc. You can also create an 'estimate' or 'advance booking' document instead of an invoice.

Offer Details Section -

The offer details section of the main invoice screen is displayed at the bottom of the window. This section is divided into three parts, with the first part displaying the available offers, the second with the applied offers, and the third with items to be added to invoice, if any, in order to avail the applied offers.

HDPOS Smart V2

Hyper Drive Super Market
 Hyper Drive Lane, Green Glen Layout, Belanduru, Outer Ring Road, Bangalore, Karnataka, 560103.
 HDPOS smart V2 Login : HDAdmin Cash Register : 01 - Manager's Drawer

Invoice #: [Hyp-100001](#) Date : [10/06/2019](#)

Barcode : Alt+B
 Item Name : Alt+I
 Search Code : Search with Stock : Alt+T

S No.	Barcode	Item Name	Qty / Weight	Measuring Unit	Unit Price with Tax	Total with Tax
1	T00001	Fresh Onion	1	Kg	30.00	30.00
2	T00004	Nandhini Pure Ghee	1	Qty	400.00	400.00
3	T00003	Royal Cardamom, 100gm	1	Qty	50.00	50.00
4	T00002	Sugar, 500gm Pack	1	Qty	45.00	45.00

Change Quantity F2 Remove Item F4 Show Stock
 Hold Invoice F6 Pick Held Invoice F7 Cancel Invoice F10
 Show Tax Details Hide Offer Details F12 Set-Up

Total : **525.00**
 Discount Amount : 0.00
 Qty Total : 4
 Customer :
 Sales Executive :

Express Pay (F5) Pay Now (F8) Estimate (F11)
 Save & Print Estimate (Alt F11)

There are no items.

All the available offers displayed here.
 All the offers applied on this invoice are displayed here
 Any items that need to be added to the invoice to complete an offer applied are displayed here

A small section above these three sections displays the offers applied on a selected item, if any. You can hide the offers section by clicking on the **Hide Offer Details** button, or by pressing the F12 button.