

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 -

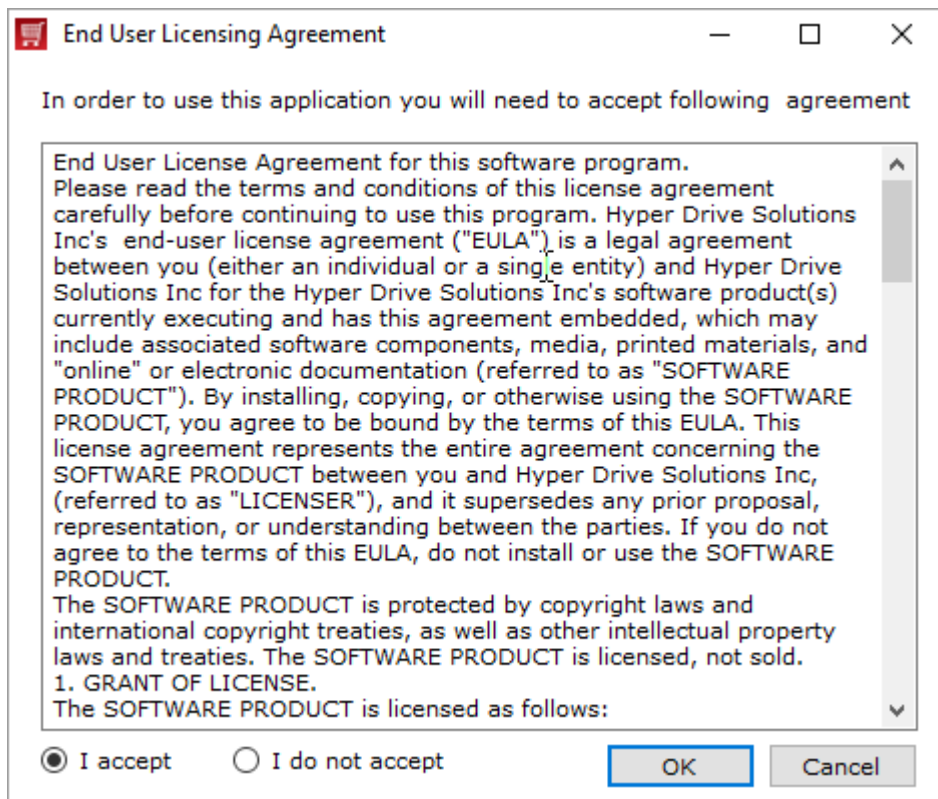
This is the first step to getting started. Follow the steps given below to login to the application.

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.



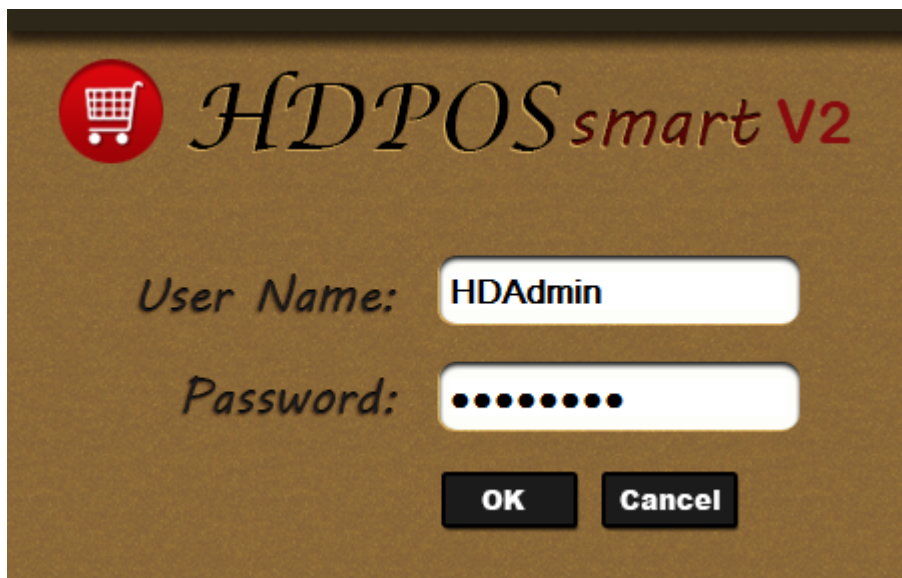
3. Click on **Continue Trial**.

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.

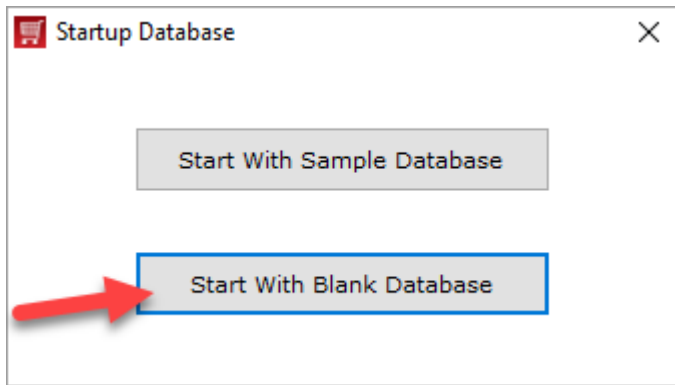


Note: HDPOS smart comes shipped with a default login -

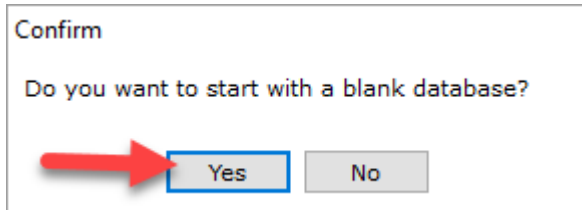
- Username: HDAdmin
- Password: @HDAdmin

7. Select a database.

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

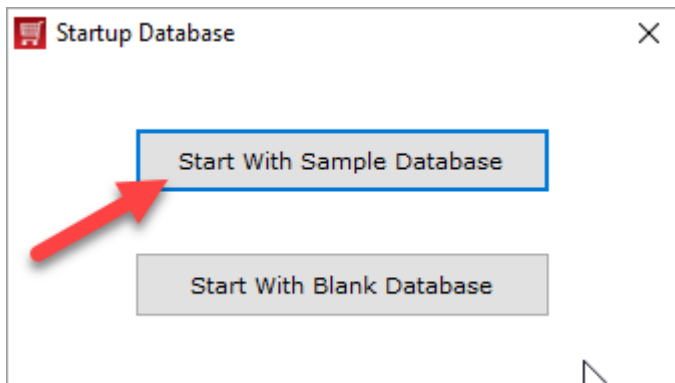


- Click on Yes in the confirmation message.

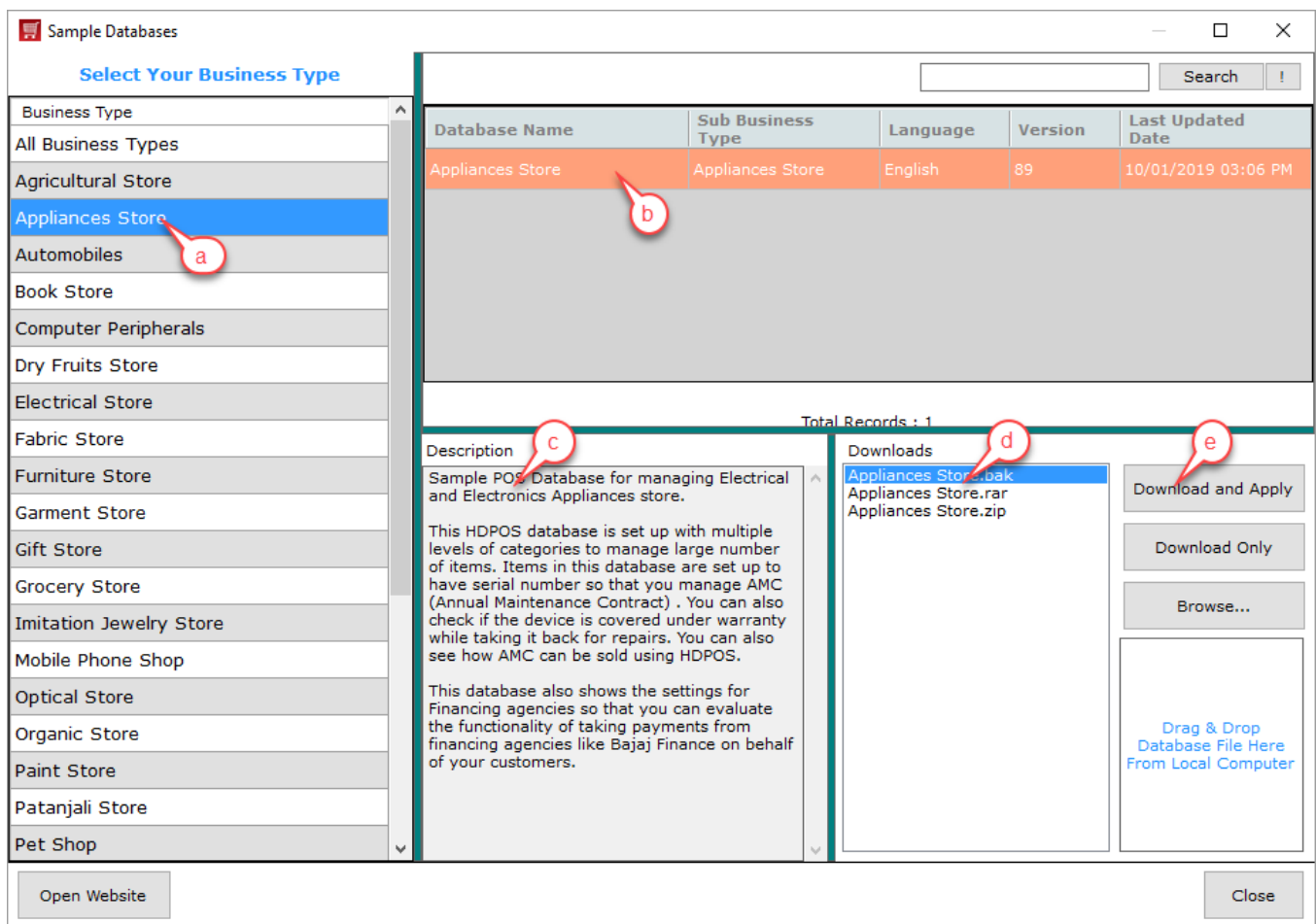


Note - If you choose to start with a new database, all the details such as the shop name, items, customers have to be entered manually.

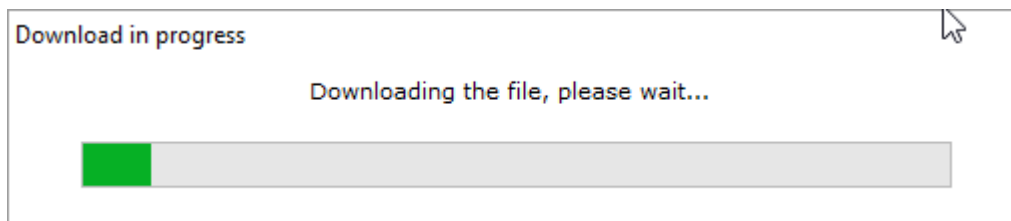
- Click on **Start with sample database** to start with one of the sample databases.



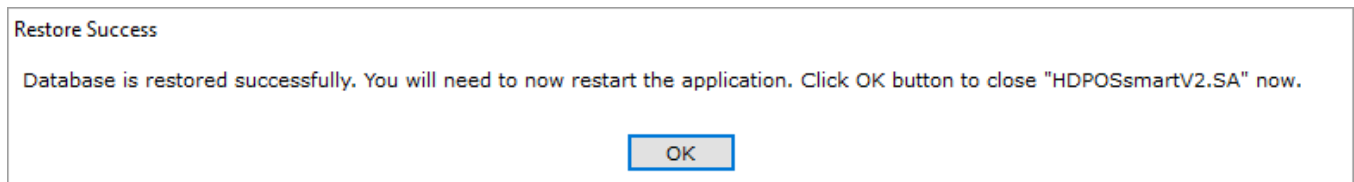
- Choose the most relevant business type on the left panel.
- Select from available databases.
- Read description to understand what the database is about, and to check if that matches with your requirements.
- Select the download file – the one with **' .bak '** file extension.
- Click on **Download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



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



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



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 :

Welcome
×

Welcome to "HDPOS smart V2" application. Please enter Name and Address details of your Business unit.

OK

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

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

Add New Company
×
?

Business Location Details

Company Name : Hyper Drive Retail Pvt Ltd.

Shop Name (Business Location) : Hyper Drive Super Market

Prefix for Documents : Hyp

Start Number for all documents : 00001

TIN Number : 10000001

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

Website : hyperdrivesolutions.com

Business Location TIN No : L000004

ESIC No :

LBT No :

CST No :

PT Registration No :

Fax No :

Service Tax No :

GST No :

Term & Condition :

Attachments

+

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Document Settings

Invoice Printer Settings

Printer Setting : Default_Laser

SMS Setting : Default

☒ Enable Email
 Email Setting : Default

Email Template Setting :

Additional Receipt Settings

☐ Print second receipt on different printer
 ☐ Ask to print every time

Second Receipt Printer :

Second Receipt Print Format :

Number of second receipts to print : 1

Additional Receipt Printers

Move Stock Setting

☐ Move stock of deleted invoices to a specified warehouse.
 Warehouse to keep stock of deleted invoices :

File Setting

☐ Save Invoice as File
 Invoice Report Format :
 File Path Template :

☐ Save Sales Return as File
 Invoice Report Format :
 File Path Template :

Create (F8)

Cancel

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.

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 :

Alt+B

Alt+I

Alt+T

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 : 0.00

Discount Amount : 0.00

Quantity Total : 0

Customer :

Sales Executive :

Express Pay (F5)

Pay Now (F8)

Estimate (F11)

Save & Print Estimate (Alt F11)

Item Selection -

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

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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)

View of Selected Items -

The items that are scanned for billing are displayed here.

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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
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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



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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

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.

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
<u>Quantity Total :</u>	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.

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Login : HDAdmin Cash Register : 01 - Manager's Drawer

Invoice # : Hyper-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)

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.

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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
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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)


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



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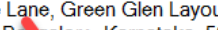
Login : HDAdmin **Cash Register :** 01 - Manager's Drawer

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

Barcode : Alt+B

Item Name : Alt+=

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
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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 :

Quantity Total :

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.

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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 Tax	Unit
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 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

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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 Cgde :

Alt+T

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

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)

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.

