

## How to add Finance agency?



HDPOS smart Tutorials

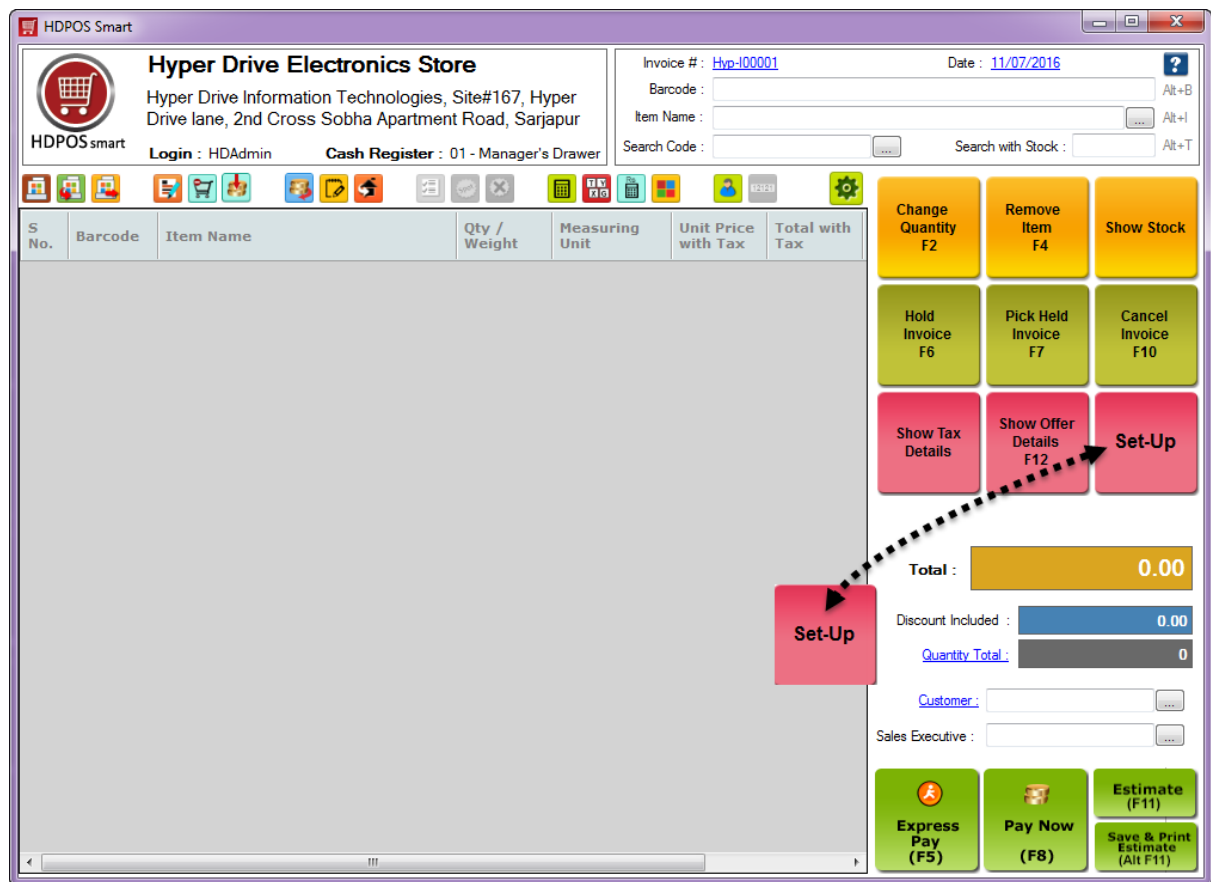
A **Finance agency**, in the general terms is the relationship between three parties.

**For example:** You are running a business and you have offered your customer to pay through EMI option. But you don't want to collect that EMI directly from the customers because you have a deal with finance agency. They will collect that EMI from customer and pay to you.

It is mostly used in **Bike Showroom, Electronic Shop, and Furniture Shop** etc...

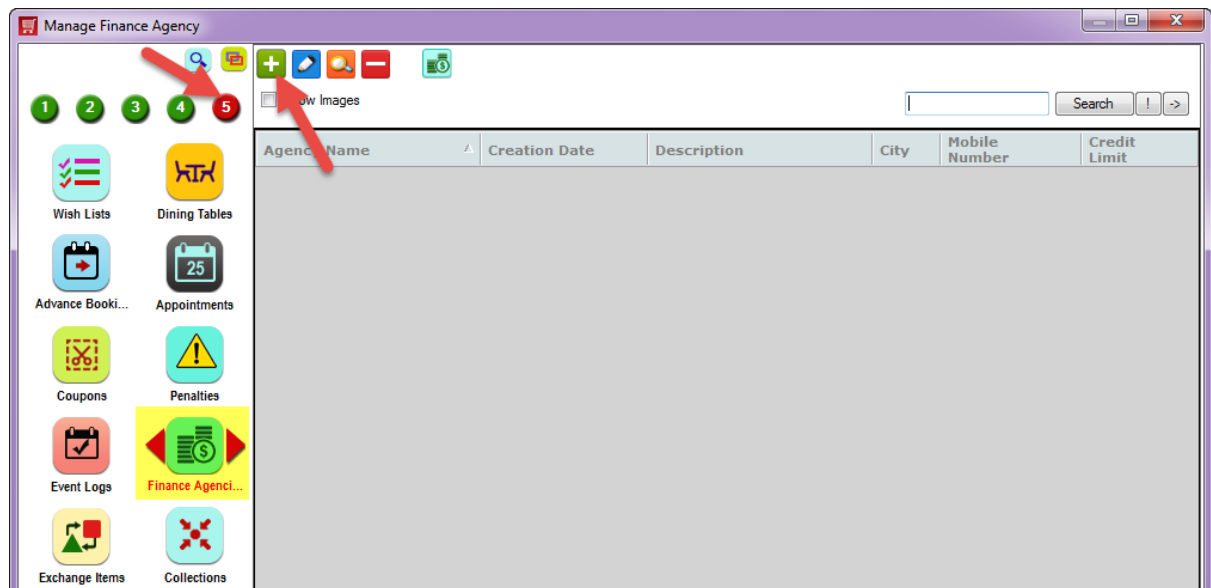
To add **Finance agency** in HDPOSsmart follow the below steps:

1. Run **HDPOSsmart**.
2. From main screen click on **Set-Up** button.



3. From **5<sup>th</sup>** page of Set-Up, click on **Finance Agency** button. From **Manage Finance Agency** screen click on **Add Finance Agency** tool strip button.





4. You will see the following **Add Finance Agency** screen.

- Enter the **Agency** details as you required.
- **Processing Fee**: If Finance agency has some processing fee, enter the fee here.
- **Credit Limit**: If Finance agency has some credit limit for you, enter that credit limit here.
- **Consider Credit Limit** Checkbox: Check this checkbox to apply the credit limit for future transactions.  
**(Note: Processing Fee and Credit Limit are optional.)**
- **Add Price List**: You can click on this button to add Finance Agency to a selected Customer Group. Click on **OK**.



**Add Item Price List**

[Add Photo](#)   [Remove Photo](#)   Price List Name :

**Default Price**

Use Default Discount  
Default Discount :  %

Use Default Increase  
Increase Amount by :  %

**Select Business Location**

Applicable To All Business Locations  
 Applicable Only For Selected Business Locations

Hyper Drive Electronics Store

**Select Customer Group**

Applicable To All Customer Groups     
 Applicable Only For Selected Customer Groups

Bajaj Finance Service

- Click on **Save (F8)** button.

**Add Finance Agency**

**Agency Details**

Agency Name :    Processing Fee Percent :  %

Description :

Credit Limit :   
 Consider Credit Limit

Address Line 1 :   
Address Line 2 :   
City :   
State :   
Zip Code :   
Mobile Number :   
E Mail :   
Phone Number :

[Change Photo](#)   [Remove Photo](#)





5. You can see the **Finance Agency** detail as shown below.

The screenshot displays the 'Manage Finance Agency' application. The interface includes a sidebar with menu items such as 'Wish Lists', 'Dining Tables', 'Advance Booki...', 'Appointments', 'Coupons', 'Penalties', 'Event Logs', 'Finance Agenci...', 'Exchange Items', 'Collections', 'Packages', 'Credit Note', and 'Supplier Cheque'. The main area features a table with the following data:

Agency Name	Creation Date	Description	City	Mobile Number	Credit Limit
Bajaj Finance Service	11/07/2016 04:13 PM	Dreams need means. Bigger dreams need bigger means. And better the reality, the bigger the next dream.	Bangalore	+91-80-4271 7700	100000

At the bottom of the table, it indicates 'Total Records : 1'. The bottom navigation bar contains buttons for 'Backup Database', 'Restore Database', 'Go Back To Main Screen', 'About Us', and 'Feedback'.