

# How to change sales executive only after the invoice is saved without using Edit Sales Invoice?



HDPOS smart Tutorials

To change sales executive only after the invoice is saved without using **Edit Sales Invoice** option, follow the steps below.

1. Run **HDPOS smart**. Make a sales invoice by adding items to main screen.
  - a. Assign item level employees and invoice level employees.  
**Note:** Make sure to provide sales commission percentage for employees.
  - b. Click on **Pay Now**.

The screenshot shows the HDPOS smart interface for 'HD Variety Store'. The invoice number is HD-100012 and the date is 05/11/2015. The store address is #167, Green Glen Layout, Sobha Apartment Road, Bellandur, Bangalore, Karnataka, 560032. The login is HDAdmin and the cash register is 01 - Manager's Drawer.

S No.	Image	Barcode	Item Name	Qty / Weight	Measuring Unit	Unit Price with Tax
1		TY5	donald duck	3	Pc	185.00
2		TY7	teddy bear	5	Pc	450.00
3		TY2	hotwheels	2	Pc	150.00

Summary:

- Total: 3,105.00
- Discount Included: 0.00
- Quantity Total: 10
- Customer: Rajesh Reddy
- Sales Executive: Eshwar Reddy

Buttons: Express Pay (F5), Pay Now (F8), Estimate (F11), Save & Print Estimate (Alt F11).

At the bottom, the Sales Executive field is set to Sanjay R. A red box highlights the Sales Executive field 'Eshwar Reddy' with an arrow pointing to the 'Pay Now' button.



2. Click on **Add All Pending Amount** button and **Save Invoice**.

**Pay Now** Invoice Number : HD-100012

**Customer Info**  
Customer: Rajesh Reddy Alt+C Sales Executive: Eshwar Reddy Alt+S  
Available Credit Limit : 10,000.00 Customer Email : rajeshreddy@gmail.com Send email to Customer  
Customer Mobile Number : 9898989896 Send sms to Customer

**Invoice Info**  
Total Before roundoff : 3,105.00 Quantity Total : 10  
Roundoff Amount : 0.00 Number of Items : 3  
Total : 3,105.00 Discount Included : 0.00  
Tax Included : 0.00

**Payment Detail**  
Cash Card Cheque Store Credit Advance Amount Approved Pending Gift Card Bank Transfer Food Coupon  
Amount Received : 3,105.00 Alt+A Ctrl+P  
Pending Amount : 0.00  
Cash : 3,105.00  
Total Received Amount : 3,105.00  
Returnable Balance : 0.00  
Save Returnable Amount as Customer Advance (F4) :

Note :  Pick Message  
Total Comission Expense : 0.00

Goods Delivered :  Print Delivery Challan :

Buttons: Save & Print Estimate (F11), Save Estimate (F12), Save & Print Booking (F6), Save Booking (F7), Save & Print Invoice (F5), Save Invoice (F8), Cancel

3. Click on **Set-Up**. Go to 1<sup>st</sup> page and click on **Sales Invoice** button.

**Set-Up**

1 2 3 4 5

Item Receive Item  
Stock Stock Transfer  
Cash Register Sales Invoice

Sales Invoice

Welcome to Set-Up



- Select the invoice for which you want change the employee and click on **View Invoice** button.

**Manage Sales Invoice**

Show Invoices Only:  Cleared  Pending  Delivered  Not Delivered  Web-Shopping Carts  Search

Business Location	Inv Number	Invoice Date	Customer Name	Grand Total	Invoice Status	Payment Status
HD Variety Store	HD-100012	05/11/2015 10:42 AM	Rajesh Reddy	3,105.00	Saved	Cleared
HD Variety Store	HD-100011	03/11/2015 01:10 PM		3,020.00	Saved	Cleared
HD Variety Store	HD-100010	03/11/2015 11:46 AM	Branch Office	2,000.00	Saved	Cleared
HD Variety Store	HD-100009	03/11/2015 11:40 AM		2,500.00	Saved	Cleared
HD Variety Store	HD-100008	03/11/2015 11:38 AM	Deepa	250.00	Saved	Cleared
HD Variety Store	HD-100007	31/10/2015 10:11 AM	Jolly	2,600.00	Saved	Cleared
HD Variety Store	HD-100006	31/10/2015 10:11 AM	Deepa	1,185.00	Saved	Cleared
HD Variety Store	HD-100005	30/10/2015 12:26 PM		1,000.00	Saved	Cleared
HD Variety Store	HD-100004	30/10/2015 12:26 PM		1,000.00	Saved	Cleared
HD Variety Store	HD-100003	30/10/2015 10:12 AM	Srujana	7,650.00	Saved	Cleared
HD Variety Store	HD-100002	30/10/2015 10:12 AM	Rajesh Reddy	95.00	Saved	Cleared
HD Variety Store	HD-100001	30/10/2015 10:11 AM	Deepa	4,035.00	Saved	Cleared

- You can see Item Sales Executive Name and Invoice Sales Executive Name for a selected item. Click on **Invoice Sales Executive Name** link [Item Sales Executive Name](#) to change the item sales executive.

**Sales Invoice Details**

Business Location: HD Variety Store      Cash Register: 01 - Manager's Drawer

Payment Status: Cleared      Invoice Date: 05/11/2015 (0 Days)      Payment Type: Cash

Invoice Number: HD-100012      Goods Delivered:       Email Invoice: rajeshreddy@gmail.com

Estimate Number:      Reference Number: HD-100012      Sms Invoice: 9898989896

ABD Number:      Loyalty Points Given: 0.00      Payment Cleared Date: 05/11/2015

Customer Name: Rajesh Reddy

Finance Agency:

S No.	Barcode	Item Name	Basic Price	Unit Tax Amount	Tax Type	Tax Percent	Unit Price	Qty / Weight	Meas Unit
1	TY5	donald duck	185.00	0.00		0.00	185.00	3	Pc
2	TY7	teddy bear	450.00	0.00		0.00	450.00	5	Pc
3	TY2	hotwheels	150.00	0.00		0.00	150.00	2	Pc

Spot Discount Reason:      Additional Tax Amount: 0.00

Spot Discount Amount: 0.00      Freight Charge Amount: 0.00

[Item Sales Executive Name](#): Sanjay R      Packing Charge Amount: 0.00

Item Sales Commission Amount: 16.65      Delivery Date: .....

[Invoice Sales Executive Name](#): Eshwar Reddy      Delivery Time Slot: .....

Invoice Sales Commission Amount: 31.05      CC Commission Amount: 0.00

Creator Name: HDAdmin      FC Commission Amount: 0.00

Note:

Tax Included: 0.00

Discount Included: 0.00

RoundOff Amount: 0.00

**Total: 3,105.00**

Quantity Total: 10

Number of Items: 3

Date      Amount      Payment Mode      Bank Name      Cheque Number      Gift Card Number      Netting Amount

05/11/2015 10:42 AM      3,105.00      Cash                          0.00

Print Delivery Challan (F7)      Print as Original Invoice (F8)      Cancel





- 6. Clicking on that link will show you the following screen of **Change Sales Executive**.
  - a. You can see the Invoice number here.
  - b. You can see all sales executive names Change the Sales Executive name by selecting it.



- c. Click on **OK**.
- 7. **Sales Commission Amount** will be calculated according to the **Sales Commission Percent** of the selected employee and you can see the changes as shown below.

**Business Location :** HD Variety Store

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

**Payment Status :** Cleared **Invoice Date :** 05/11/2015 (0 Days)

**Invoice Number :** HD-100012 **Goods Delivered :**

**Payment Type :** Cash

**Estimate Number :** **Reference Number :** HD-100012 **Email Invoice :** rajeshreddy@gmail.com

**ABD Number :** **Loyalty Points Given :** 0.00 **Sms Invoice :** 9898989896

**Customer Name :** Rajesh Reddy **Payment Cleared Date :** 05/11/2015

**Finance Agency :**

S No.	Barcode	Item Name	Basic Price	Unit Tax Amount	Tax Type	Tax Percent	Unit Price	Qty / Weight	Meas Unit
1	TY5	donald duck	185.00	0.00		0.00	185.00	3	Pc
2	TY7	teddy bear	450.00	0.00		0.00	450.00	5	Pc
3	TY2	hotwheels	150.00	0.00		0.00	150.00	2	Pc

There are no offers applied to the selected item.

**Spot Discount Reason :**  
**Spot Discount Amount :** 0.00  
**Item Sales Executive Name :** Arjun K Patel  
**Item Sales Commission Amount :** 11.10  
**Invoice Sales Executive Name :** Eshwar Reddy

**Additional Tax Amount :** 0.00  
**Freight Charge Amount :** 0.00  
**Packing Charge Amount :** 0.00  
**Delivery Date :** .....

**Invoice Sales Commission Amount :** 31.05  
**CC Commission Amount :** 0.00  
**FC Commission Amount :** 0.00  
**Creator Name :** HDAdmin  
**Note :**

**Tax Included :** 0.00  
**Discount Included :** 0.00  
**RoundOff Amount :** 0.00  
**Total :** 3,105.00  
**Quantity Total :** 10  
**Number of Items :** 3

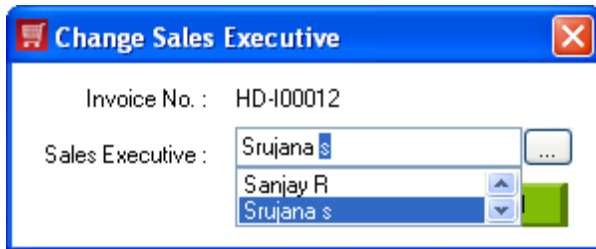
Date	Amount	Payment Mode	Bank Name	Cheque Number	Gift Card Number	Netting Amount
05/11/2015 10:42 AM	3,105.00	Cash				0.00

**Print Delivery Challan (F7)** **Print as Original Invoice (F8)** **Cancel**

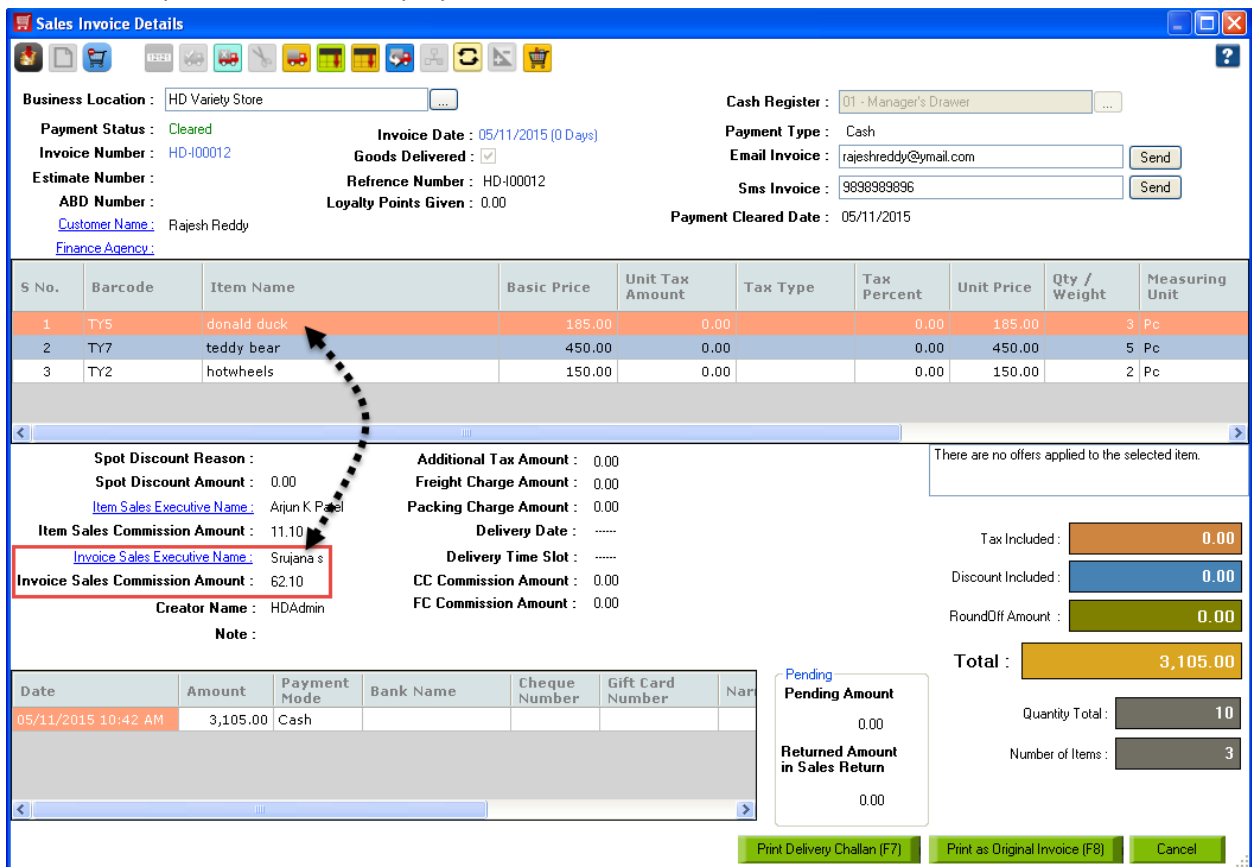


8. To change the invoice sales executive , click on the [Invoice Sales Executive Name](#) : link, and you will see the following screen of Change Sales Executive.

a. Select the sales executive for the invoice and click on **OK**.



9. You can see the changed employee name as shown below. The commission percentage also got calculated as per the selected employee.



10. Click on **Cancel** button.