

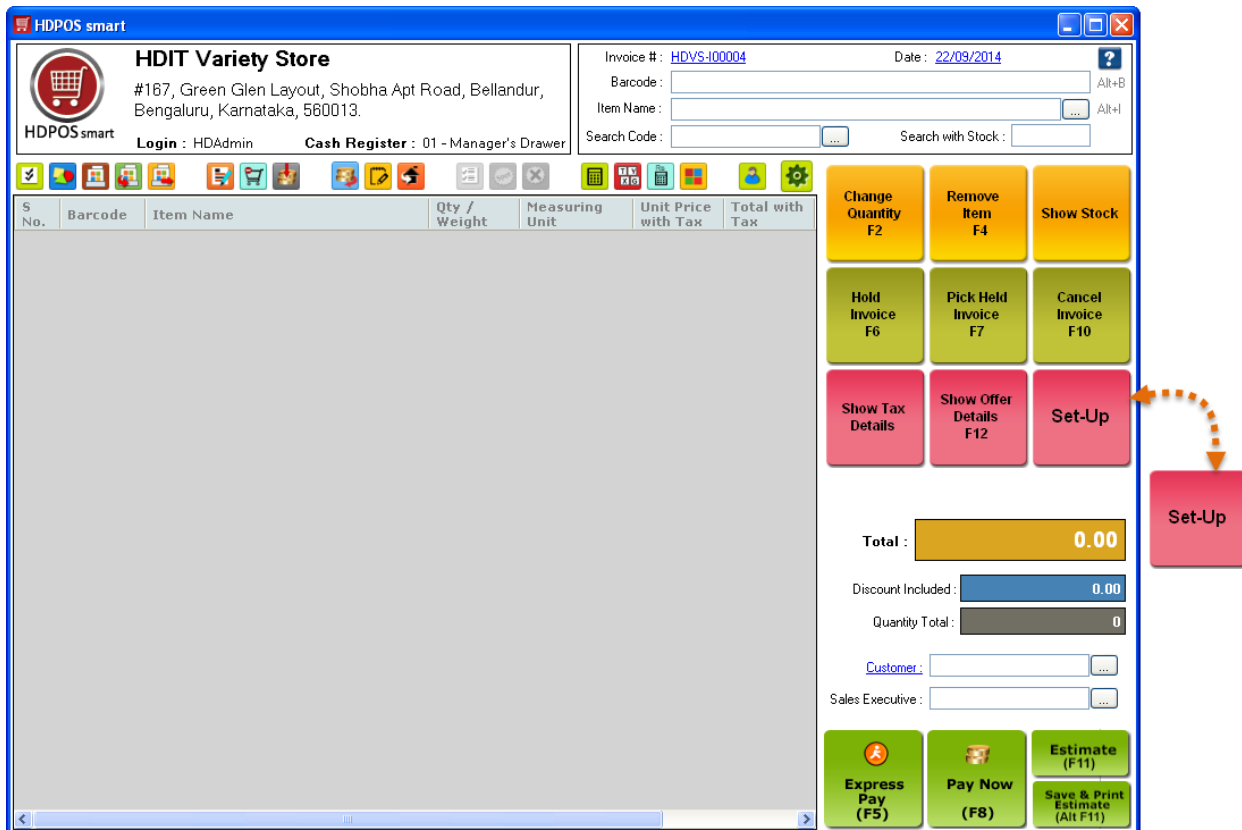
How to define an offer for a customer group?



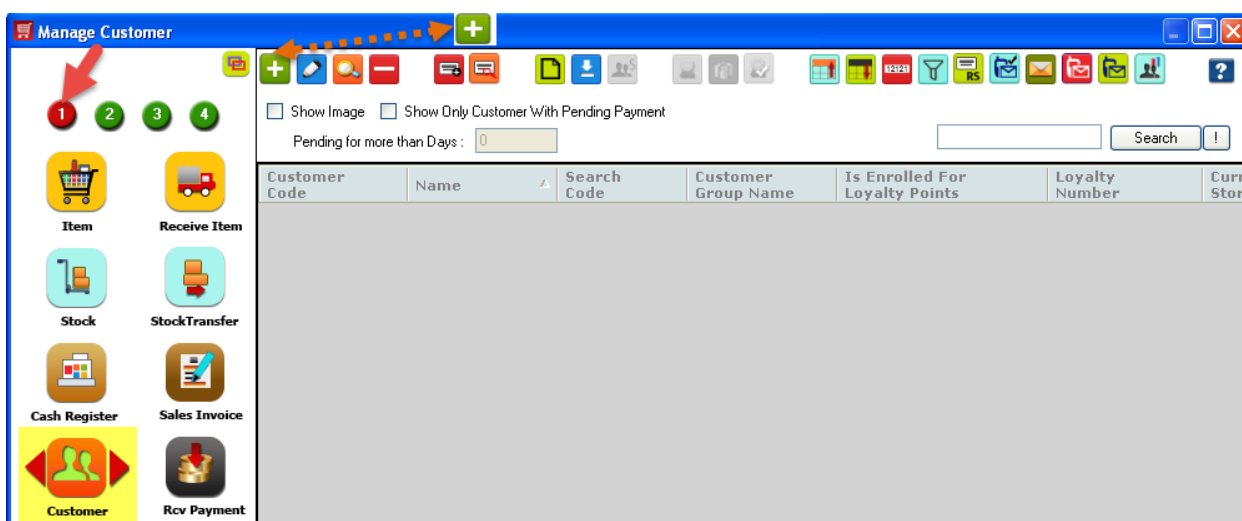
HDPOS smart Tutorials

Sometimes you need to define an offer that can be applied to particular customer group. To do that in HDPOS smart, follow the steps below.


1. Run **HDPOS smart**.
2. From **main Invoice** screen, select **Set-Up**.



3. From 1st page, select **Customer**. Click on **Add New Customer** button to create a customer.





4. **Add New Customer** screen will be opened.
 - a. Enter required details for customer.
 - b. In **Customer Group** section, select a customer group if it already created.
 - c. If you want to create a new customer group, click on  beside Customer Group field. **Customer Group Manager** screen will be opened. Click on **Add Customer Group** button and enter a name for customer group and click on OK.

Add Customer Group

Name : VIP

Description : VIP Customers

Create (F8) Cancel

- d. Click on **Save**.

Add New Customer

Customer Code : C00004 Define my own Code Change Photo Remove Photo

Customer Details

First Name : Ram
Last Name : K
Search Code : 678
Birth Date : 01/09/2014 Clear
Anniversary Date : Clear
 Is Active
VAT No : 1234567 CST No : 45678ui
TIN No : 345623 PAN No : we345ty

Shipping Address Billing Address

Address Line 1 : #167, Green Glen Layout
Address Line 2 :
City : Bellandur
State : Karnataka
Zip Code : 560013
Telephone Number : 45678910 Mobile Number : 3456789012
E Mail : ramk@gmail.com

Customer Loyalty

Is Enrolled For Loyalty Points
Loyalty Number : Auto-Generate Number
Enrollment Date : ...
Loyalty Points : 0.00
Referred By : (For Loyalty Points) Is Loyalty Points to Referrer on Every Invoice

Credit Limit / FA

Use System Default Credit Limit
Credit Limit : 0.00
FA Balance : 0.00

Customer Group

Customer Group : VIP

Financial Account

Opening Balance : 0.00 Cr Change


Customer Display Name

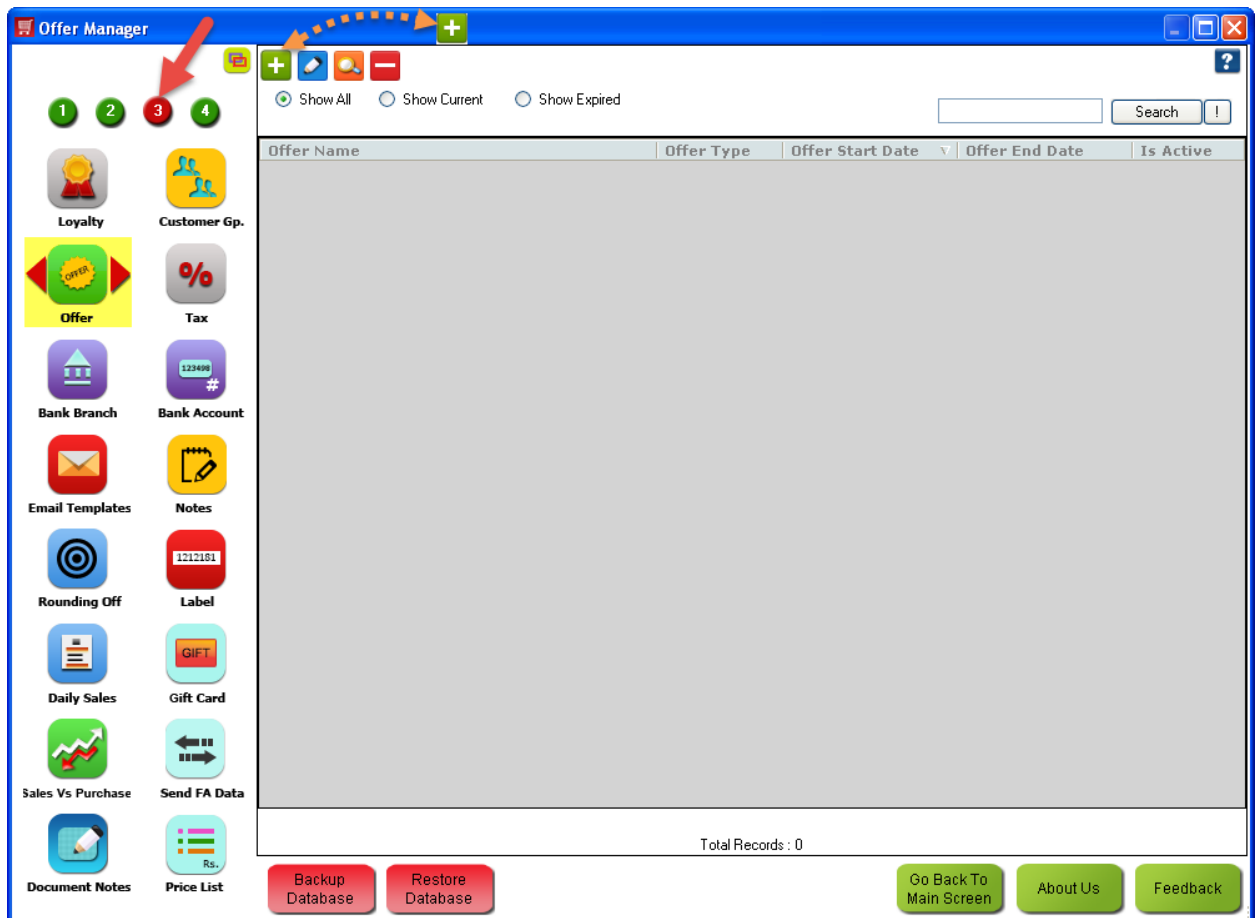
Customer Name For Display : RamK Name by Template

User Field List

Attachments Save (F8) Cancel



5. Go to 3rd Page, Click on Offer. Click on  button to create a new offer.



6. **Add New Offer** screen will be opened.

- a. Select the offer type from available offer types.
- b. Select Offer **Start Date** and **End Date**.
- c. **'Is Repeated'** checkbox: Check this checkbox if you want to repeat the offer on any other day(s) of the week. When you check this checkbox, **Repeated Days** box is enabled. Select the days for which you want to apply offer by checking the checkboxes. You can also select the time period during which the offer will be applied.
- d. Enter **name** for offer.
- e. Under **Select Business Location** section: You can select all business locations or some business locations for which you want the offer to be applied.
 - i. To select all business locations, mark the radio button "Applicable to all Business Locations".
 - ii. To select some of the business locations, mark the radio button "**Applicable Only for Selected Business Locations**". Then check the Business Location name for which you want the offer to be applied.



- f. Under Select **Customer Groups** section: You can select all customer groups or some customer groups for which you want the offer to be applied.
 - i. To select all business locations, mark the radio button “Applicable to all Business Locations”.
 - ii. To select some of the customer groups, mark the radio button “**Applicable Only for Selected Customer Groups**”. Then check the customer group name for which you want the offer to be applied.
- g. For example, I selected **Buy X get Y Free** offer.
- h. Click on **Save**.

Add New Offer

Offer Type : Buy X get Y Free
Description : Buy X item and get Y free

Offer Start Date : 24/02/2015 00:00:00 Offer End Date : 25/02/2015 23:59:59

Is Repeated

Repeated Day
 Sunday Monday Tuesday Wednesday
 Thursday Friday Saturday

Start Time : 05:03 PM End Time : 05:03 PM

Offer Name : *** Get Micky Mouse Club Set free *** Active Applied for coupons

Select Business Locations
 Applicable To All Business Locations
 Applicable Only For Selected Business Locations

HDIT Franchise Store
 HDIT Variety Store

Select Customer Groups
 Applicable To All Customer Groups Customer Groups...
 Applicable Only For Selected Customer Groups

General
 Retailers
 VIP
 Wholesellers

Buy Item : Micky Mouse Club set
Item Quantity : 1 Qty
Free Item : Micky Mouse Club set
Free Item Quantity : 1 Qty

Save (F8) **Cancel**



- Go back to main screen and select items for invoice. Select the customer who belongs to VIP customer group. You can see the offer details are displayed in offers section.

HDPOS smart

HDIT Variety Store
#167, Green Glen Layout, Bellandur, Bangalore,
Karnataka, 560013.
Login : HDAdmin Cash Register : 01 - Manager's Drawer

Invoice #: HDVS-100009 Date: 24/02/2015
Barcode: Alt+B
Item Name: Alt+I
Search Code: Search with Stock:

S No.	Barcode	Item Name	Qty / Weight	Measuring Unit	Unit Price with Tax	Total with Tax
1	T00006	Micky Mouse Club set	1	Qty	1,500.00	1,500.00

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 : **1,500.00**
Discount Included: 0.00
Quantity Total: 1.00

Customer: Ram K
Sales Executive:

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

There are no offers applied to the selected item.

Following free items are pending 1 free "Micky Mouse Club set".

- Add the free items to invoice. You can see in the main invoice screen, the offer has been applied to the items.

HDPOS smart

HDIT Variety Store
#167, Green Glen Layout, Bellandur, Bangalore,
Karnataka, 560013.
Login : HDAdmin Cash Register : 01 - Manager's Drawer

Invoice #: HDVS-100009 Date: 24/02/2015
Barcode: Alt+B
Item Name: Alt+I
Search Code: Search with Stock:

S No.	Barcode	Item Name	Qty / Weight	Measuring Unit	Unit Price with Tax	Total with Tax
1	T00006	Micky Mouse Club set	1	Qty	1,500.00	1,500.00
2	T00006	Micky Mouse Club set	1	Qty	0.00	0.00

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 : **1,500.00**
Discount Included: **1,500.00**
Quantity Total: 2.00

Customer: Ram K
Sales Executive:

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

1 of "Micky Mouse Club set" is free on this item under "" Get Micky Mouse Club Set free "".

Following offers are applied: Received 1 free "Micky Mouse Club set".





9. Click on **Pay Now** button and enter the amount. Click on **Save**.

Pay Now Invoice Number : HDVS-100009

Customer Info
Customer: Ram K Available Credit Limit : 0.00
Sales Executive : Customer Email : Send email to Customer
Customer Mobile Number : Send sms to Customer

Invoice Info
Total Before roundoff : 1,500.00 Quantity Total : 2.00
Roundoff Amount : 0.00 Number of Items : 2
Discount Included : 1,500.00
Total : 1,500.00 Tax Included : 0.00
Tax Details :

Payment Detail
Cash Card Cheque Store Credit Advance Amount Approved Pending Gift Card Bank Transfer Food Coupon
Pending Amount : 0.00
Cash : 1,500.00
Amount Received : 1,500.00
Note :
Goods Delivered : Print Delivery Challan :
Total Commission Expense : 0.00
Total Received Amount : 1,500.00
Returnable Balance : 0.00
Save Returnable Amount as Customer Advance (F4) :

Save & Print Estimate (F11) Save Estimate (F12) **Save & Print (F5)** Save (F8) Cancel