

How to define an offer that gives discount on category?



To define an offer in HDPOS smart, follow the steps below.

1. Run **HDPOS smart**. Click on **Set-Up** from the main invoice screen.

The screenshot shows the HDPOS smart main invoice screen. The window title is "HDPOS smart". The store name is "HDIT Variety Store" with address "#187, Green Glen Layout, Bellandur, Bangalore, Karnataka, 560013." The login is "HDAdmin" and the cash register is "01 - Manager's Drawer". The invoice number is "HDVS-100010" and the date is "24/02/2015". The screen features a table with columns: S No., Barcode, Item Name, Qty / Weight, Measuring Unit, Unit Price with Tax, and Total with Tax. On the right side, there are several buttons: 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), and Set-Up. Below these buttons, there are fields for Total (0.00), Discount Included (0.00), and Quantity Total (0.00). At the bottom right, there are buttons for Express Pay (F5), Pay Now (F8), and Estimate (F11). A red dashed arrow points from the Set-Up button in the main interface to a separate Set-Up button on the right.

2. Go to 3rd page, click on Offer to open the **Offer Manager** screen. Click on **Add New Offer** button.

The screenshot shows the Offer Manager screen. The window title is "Offer Manager". The screen features a sidebar with icons for Loyalty, Customer Gp., Offer, Tax, Bank Branch, and Bank Account. The Offer icon is highlighted with a red arrow. The main area shows a table with columns: Offer Name, Offer Type, Offer Start Date, Offer End Date, and Is Active. There are also buttons for Show All, Show Current, and Show Expired, and a search field.



3. From the **Add New Offer** screen,
 - a. Select the offer type as '**Discount on Category**'.
 - b. Select the 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. Add the **category name** for which you want to give discount.
 - h. From '**Set Discount Level**' section, enter the invoice amount and discount you want to apply (either in amount or percentage).
 - i. Click on **Save**.



Add New Offer

Offer Type: ...

Description: **Discount on category**

Offer Start Date: Offer End Date:

Is Repeated

Repeated Day

Sunday Monday Tuesday Wednesday
 Thursday Friday Saturday

Start Time: End Time:

Offer Name: 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
 Applicable Only For Selected Customer Groups

General
 Retailers
 VIP
 Wholesellers

Category Name			
Toys			

Set Discount Level

S No.	Invoice Amount	Discount Amount	Is Percent
1		3,000.00	10.00 <input checked="" type="checkbox"/>



- Go back to main screen and select items for a new invoice from a category for which you defined offer. Click on Pay Now.

HDPOS smart

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

Invoice #: HDVS-100011 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	T00005	Dora Doll	2	Qty	1,200.00	2,400.00
2	T00014	Mighty Raju Board Game	3	Qty	250.00	750.00
3	T00003	Teddy Bear	1	Qty	1,200.00	1,200.00

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 : **3,915.00**
Discount Included : 435.00
Quantity Total : 6.00
Customer :
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 offers are applied:
Received 10% off on Category "Toys".

The actual invoice amount is As you can see from invoice offers section, the applied offer details are displayed and offer amount is reflected as discount in the sales invoice.



5. Click on Save.

Pay Now Invoice Number : HDVS400011

Customer Info
Customer: [] Alt+C Sales Executive: [] Alt+S
Available Credit Limit : 0.00 Customer Email : [] Send email to Customer
Customer Mobile Number : [] Send sms to Customer

Invoice Info
Total Before roundoff : 3,915.00 Quantity Total : 6.00
Roundoff Amount : 0.00 Number of Items : 3
Total : 3,915.00 Discount Included : 435.00
Tax Included : 0.00

Payment Detail
Cash Card Cheque Store Credit Advance Amount Approved Pending Gift Card Bank Transfer Food Coupon
Amount Received : 3,915.00 Alt+A Ctrl+P
Pending Amount : 0.00
Cash : 3,915.00

Note : [] Pick Message
Total Commission Expense : 0.00
Goods Delivered : Print Delivery Challan :
Total Received Amount : 3,915.00
Returnable Balance : 0.00
Save Returnable Amount as Customer Advance (F4) :

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