

# How to define an offer- Discount on Invoice Amount?



HDRestaurant Tutorials

To define an offer of type – **Discount on Invoice Amount**, you need to follow below steps:

1. Run **HDPOS smart**.
2. Click on **Set-up** button from **Restaurant Dashboard** window.

The screenshot shows the HD Restaurant Restaurant Dashboard. At the top, there are buttons for 'Dine In (F5)', 'Take Away (F6)', 'Delivery (F7)', 'Pick Held Invoice', 'Awaiting Payment', and 'Table Manager'. Below these is a 'Set-Up' button with a gear icon, which is highlighted by a red arrow. The dashboard also features a 'Change Order Status' section with buttons for 'Delivered', 'Delivery Failed', 'Dispatched', 'Not Delivered', 'Order Placed', 'Prepared', and 'Preparing'. A table of orders is visible below, with columns for Invoice Type, Table Number, Payment Status, Order Status, Invoice Status, Inv Number, Invoice Date, and Total. The table contains 7 records.

Invoice Type	Table Number	Payment Status	Order Status	Invoice Status	Inv Number	Invoice Date	Total
Take Away		Pending	Order Placed	Saved	Hyp-100007	13/03/2017 02:34 PM	
Home Delivery		Cleared	Order Placed	Saved	Hyp-100006	13/03/2017 02:32 PM	
Take Away		Cleared	Order Placed	Saved	Hyp-100005	13/03/2017 12:43 PM	
Take Away		Cleared	Order Placed	Saved	Hyp-100004	13/03/2017 12:39 PM	
Home Delivery		Cleared	Order Placed	Saved	Hyp-100003	13/03/2017 11:13 AM	
Take Away		Cleared	Order Placed	Saved	Hyp-100002	13/03/2017 11:09 AM	
Dine In	Table 2 - AC	Awaiting Payment	Order Placed	Saved	Hyp-100001	13/03/2017 11:08 AM	

Total Records : 7

3. From 3rd Page of **set-up**, click on **Offers**.

The screenshot shows the Offer Manager window. The 'Offers' button is highlighted with a red arrow. The window displays a table of offers with columns for Offer Name, Offer Type, Offer Start Date, Offer End Date, Is Active, Is Repeated, Week Days, and R/S. The table contains 3 records.

Offer Name	Offer Type	Offer Start Date	Offer End Date	Is Active	Is Repeated	Week Days	R/S
HD Restaurant Discount On Category Offer	Discount On Category	14/03/2017 12:00 AM	14/05/2017 11:59 PM	Yes	No		
HD Restaurant Buy X get Y Free Offer	Buy X get Y Free	14/03/2017 12:00 AM	20/03/2017 11:59 PM	Yes	No		
Happy Hours Special Buy 2 Beer Get 1 Free	Buy X get Y Free	02/03/2017 12:00 AM	02/05/2019 11:59 PM	Yes	Yes	,1,2,3,4	11

4. From **Offer Manager** Window, click on **Add New Offer** button.

The screenshot shows the Offer Manager window. The 'Add New Offer' button (a green plus sign) is highlighted with a red arrow. The window displays the same table of offers as in the previous screenshot.





5. In **Add New Offer** window enter the required details.

S No.	Invoice Amount	Discount Amount	Is Percent
1	500.00	2.00	<input checked="" type="checkbox"/>
2	1,000.00	5.00	<input checked="" type="checkbox"/>
	0.00	0.00	<input type="checkbox"/>

- **Offer Type:** Select the offer type **Discount on Invoice Amount** from available offer types.
- **Offer Name:** Enter Offer Name.
- **Preference Weightage:** Enter the preference weightage. If you want to give priority among different offers created for the customer collection.
- Select **Offer Start Date** and **End Date**.
- **'Is Repeated'** checkbox: Check this checkbox if you want to repeat the offer on any specific 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.
- **Is Active:** Offer is made active only when this checkbox is checked.
- **Applicable Only for coupons:** When this checkbox is checked, the offer is applied only when coupons created against this offer is applied to invoice.
- 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.





- Under **Select Customer Groups** section: You can select all customer groups or some customer groups for which you want the offer to be applied.
    - To select all customer groups, mark the radio button **“Applicable to all Customer Groups”**.
    - To select some of the customer group, 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.
    - To select customer collections, mark the radio button **“Applicable Only for Selected Customer Collections”**. Then check the customer collection name for which you want the offer to be applied.
  - Enter the **Invoice Amount** of what you want to apply offer, and accordingly select **Discount Amount** or **Percentage** you want to give for the offer.
6. Click on **Save (F8)** to save the offer details.
7. Now from restaurant dashboard click on Dine In or (Take Away or Home Delivery) and select and add items to invoice grid. You will see offer details displayed on the bottom of the screen as shown below.

The screenshot shows the HD Bar & Restaurant software interface. The main menu grid displays various items like Adorable Fru..., Aloo Pyaz..., Amruth Fusio..., Assorted Pa..., Baigan ka B..., Bread Pane..., Broccoli Pan..., Chicken 65, Chicken Har..., Chicken Loll..., Chicken Oy..., Chicken Spr..., Chinese Frie..., Chinese Sp..., Chinese Ve..., Corian der C..., Corona, Crispy Thre..., Diet Pepsi, and Erstoff 30 ml. The invoice details on the right show Invoice #: Hyp-100008, Date: 15/03/2017, and a table with 1 item: Chicken 65, Qty: 2.00. The total amount is 882.00, with a discount of 18.00. The quantity total is 2. The customer is Srinivasan Rao and the sales executive is Manoj Singh. The offer information at the bottom indicates that no offers are applied to the selected item.

S No.	Item Name	Qty
1	Chicken 65	2.00

**Total : 882.00**

Discount Included : 18.00

Quantity Total : 2

Customer : Srinivasan Rao

Sales Executive : Manoj Singh

Following offers are available:  
Add 100.00 more to invoice total and to get 5% off.

Following offers are applied:  
Received 2% off on invoice total.