

# How to make a pending invoice for a customer?



HDPOS smart Tutorials

Sometimes in your business, customers will purchase items without making any payment and you will receive this pending payment from them later.

To create a pending invoice in HDPOS smart, follow the steps below.

- [Step1: Create a customer with credit limit.](#)
- [Step2: Make a pending sales invoice for that customer.](#)

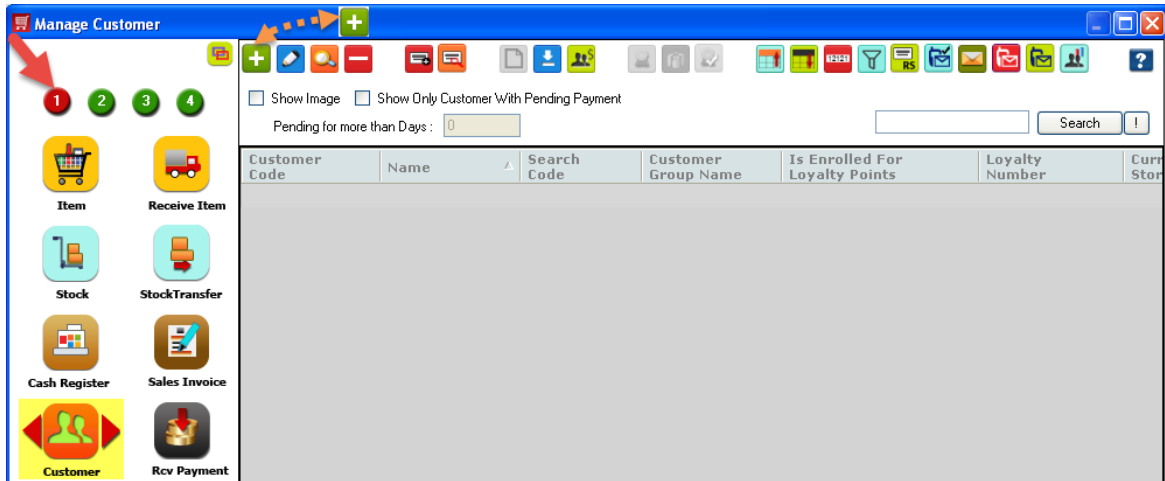
## **Step1:**

1. Run **HDPOS smart**. From main invoice screen, click on **Set-Up**.

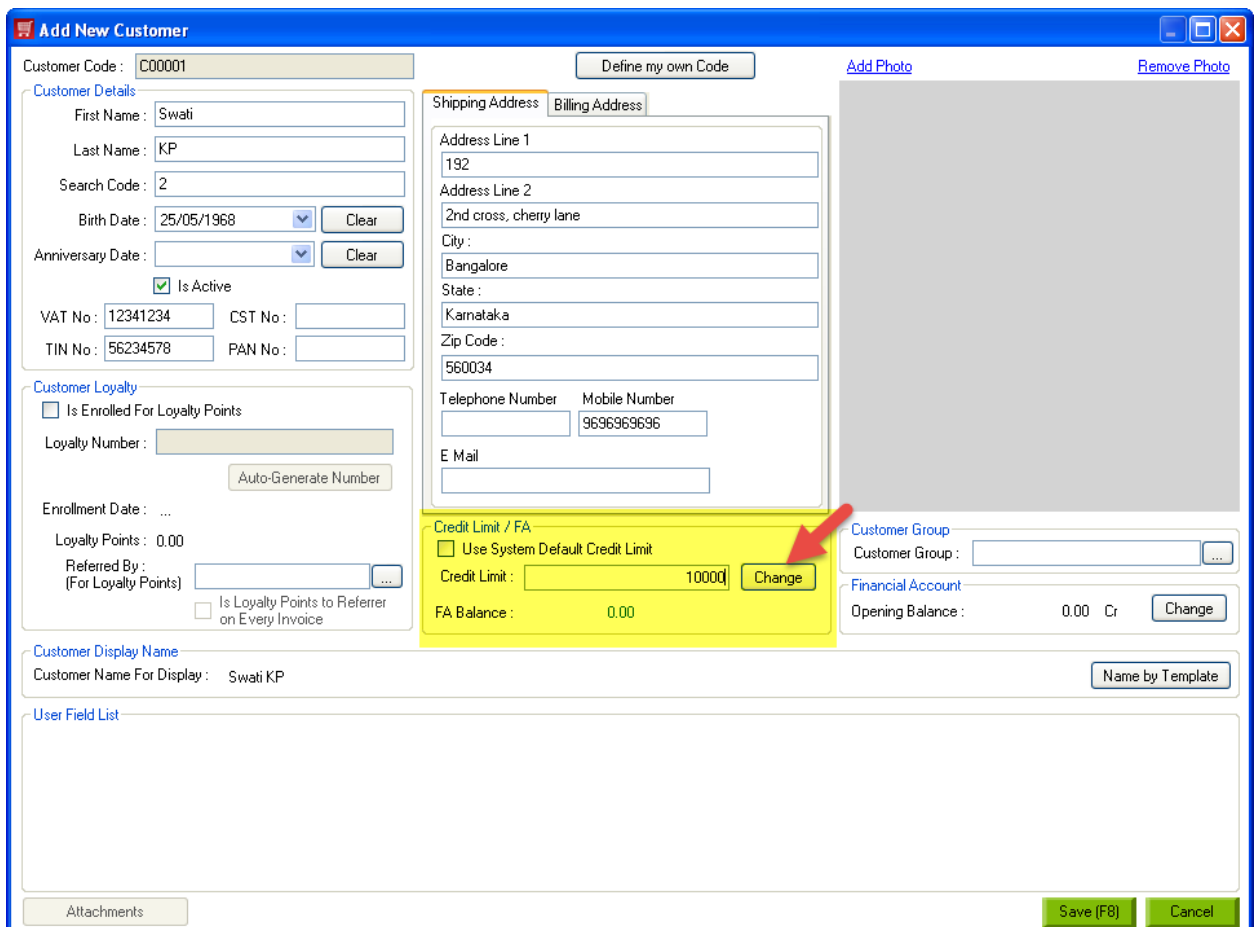
The screenshot displays the HDPOS smart software interface for 'HDIT Variety Store'. The window title is 'HDPOS smart'. The store name is 'HDIT Variety Store' with the address '#187, Green Glen Layout, Bellandur, Bangalore'. The login is 'HDAdmin' and the cash register is '01 - Manager's Drawer'. The invoice number is 'HDI-00005' and the date is '30/09/2014'. The interface includes 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', 'Show Offer Details (F12)', and 'Set-Up'. Below these buttons are fields for 'Total: 0.00', 'Discount Included: 0.00', and 'Quantity Total: 0'. There are also fields for 'Customer' and 'Sales Executive'. At the bottom right, there are buttons for 'Express Pay (F5)', 'Pay Now (F8)', 'Estimate (F11)', and 'Save & Print Estimate (Alt F11)'. A red box highlights the 'Set-Up' button, and an orange arrow points from it to a separate red box labeled 'Set-Up' on the right side of the screenshot.



- From 1<sup>st</sup> page, click on **Customer**. Click on **Add New Customer**.



- In **Add New Customer** screen, enter all required details.
  - Uncheck the checkbox **Use System Default Credit Limit**.
  - You will see **Change** button beside **Credit Limit** text box. Enter the value for credit limit.  
**Note:** You cannot do a sales invoice for this customer beyond the credit limit.
  - Click on **Save**.





**Step2:**

4. Go back to main screen. Select items for the invoice. Select the customer name.

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

Invoice #: HDI-00001 Date : 24/11/2014  
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	T00001	Hot wheels Blue Car	1	Qty	1,200.00	1,200.00
2	T00004	Sand play tools	1	Qty	500.00	500.00

**Change Quantity F2** **Remove Item F4** **Show Stock**  
**Hold Invoice F6** **Pick Held Invoice F7** **Cancel Invoice F10**  
**Show Tax Details** **Show Offer Details F12** **Set-Up**

**Total : 1,700.00**  
Discount Included: 0.00  
Quantity Total: 2  
Customer: Swati KP  
Sales Executive:

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



5. Click on **Pay Now**. You can see the customer's credit limit in this screen.
6. From the **Payment Detail** section, select **Approved Pending**.
7. Enter the invoice amount. Click on **Save**.