

How to make a sales invoice using card terminal?



HDPOS smart Tutorials

A card terminal is a device that interfaces with payment cards to make electronic fund transfers.

When a sales invoice is made using a credit/debit card, you have to pay the commission amount to the bank to which the card belongs to. You can pay this commission amount to bank on your own OR you can take it from the customer and give the same to bank.

To make a sales invoice using card terminal follow the steps below.

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



2. From Set-Up screen, go to 4th page, click on **Settings**. From **System Settings** screen, click on **General Settings**.





- From **General Settings** screen, check the checkbox **“Use Multiple Credit Card Terminal”** and **“Collect Credit Card and Food Coupon Commission Expense from Customer”**. Click on **Apply**.
 - If you don't want to take commission from customer, uncheck the checkbox **“Collect Credit Card and Food Coupon Commission Expense from Customer”**.

General Setting

Idle Time For Logout : 200 Minutes

Regional Language Font Setting : Verdana, 8.25, style=Regular [Change Font](#)

Default Purchase Measuring Unit : Qty ... Default Sales Measuring Unit : Qty ...

Number of Receipts Payment to Print : 1 Default Sales Price Markup : 0 %

Allow Parent Child Relationship In Item Fields Allow To Associate Customer With Godown

Use Alternate Barcode In Items Show Warning of Negative Stock While Doing Stock Transfer

Give Preference to Custom Field Barcode Allow To Resize and Reorder Columns in Search Grids

Use Category Barcode Prefix Remember Column Sizes and Order After Application Close

Reset Prefix Number For Category Allow Zero MRP

Made By Is Compulsory In Make & Break Ask For Hold Note

Support Advance Tax Structure Use Multiple Types of Food Coupons

Show Image with Selection Box Use Multiple Types of Card

Enable AMC Management **Use Multiple Credit Card Terminal**

Show Returnable Amount PopUp on Pay Now and Received Payment **Collect Credit Card and Food Coupon Commission Expense From Customer**

Enable Advance booking Management Warn To Change HDAdmin Password

Use Container Stock Transfer Warn to change SQLite Database to SQL Server

Keep Focus on Mobile Textbox for Customer Allow to Add Discount in RIE with No Effect on Purchase Price


Show Purchase Return Warning For Supplier Allow to Pay Additional Charges in RIE to Supplier

Is Customer Mandatory For Exchange

Default Tax Collected While Selling : ...

Default Tax Paid While Purchasing : ...

Logo Setting

 [Change Logo](#)

[Remove Logo](#)

Secondary Measuring Unit

Use Secondary Measuring Unit

Secondary Default Purchase Measuring Unit : Qty ...

Secondary Default Sales Measuring Unit : Qty ...

Weighing Scale Barcode Sticker Settings

Barcode Prefix : W Item Barcode Length : 6 [Including Prefix](#)

Qty Length in Barcode : 6 Decimal Points in Qty : 3

Total Barcode Length : 12

Financial Year

Day : 01

Month : 04

[Apply date to existing record](#)

[Apply](#) [Cancel](#)



4. Go to main screen. Make a sales invoice by adding items to invoice grid. Click on **Pay Now** button.

HDPOS smart

HDIT Variety Store
Site No.#167, Green Glen Layout, Bellandur, Bengaluru, Karnataka, 560038.
Login : HDAdmin Cash Register : 01 - Manager's Drawer

Invoice #: **HD-100043** Date: **14/09/2015**

Barcode: Alt+B
Item Name: Alt+I
Search Code: Search with Stock: Alt+T

S No.	Barcode	Item Name	Qty / Weight	Measuring Unit	Unit Price with Tax	Total with Tax
1	T00012	Blue Stripped Shirt	1	Qty	2,599.00	2,599.00
2	T00013	Boys Party Wear Suit	1	Qty	1,599.00	1,599.00
3	T00018	Kooves Blazer	1	Qty	1,349.00	1,349.00

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 : 5,547.00

Discount Included: 0.00
Quantity Total: 3

Customer: Satish G
Sales Executive: Uma M

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

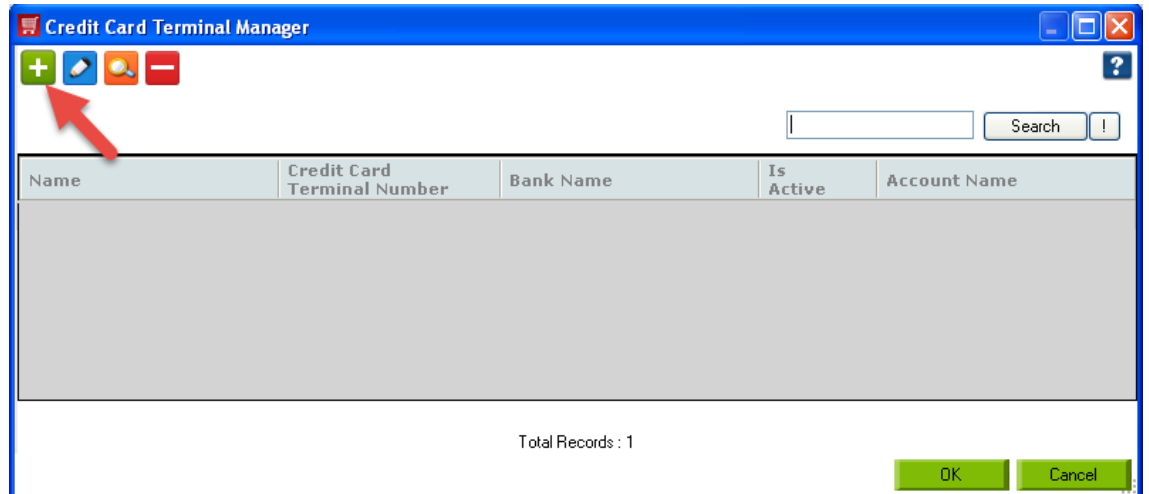


5. You will see the **Pay Now** screen with all details of payable amount. Under the **Payment Details** section, click on the **Card** tab.

Enter the details for

- **Amount:** Enter the amount to be paid by the specific card.
- **Card Holder Name:** Enter the card holder name here.
- **Bank Name:** Enter the bank name.
- **Approval Number:** Enter the approval number of the credit card transaction here. You will get this number once the card is swiped.
- **Payment Gateway:** Click on the 3-dotted button beside the **Payment Gateway** to add the terminal details.
 - You will see the screen of **Credit Card Terminal Manager**. Click on **Add Terminal** button as shown below.





- **Step I: Add Credit Card Terminal:** You will see the following screen, where you have to enter the details of the terminal.

- **Name:** Enter any name of Credit Card Terminal.
 - **Number:** Enter any number for the terminal.
 - **Bank Name:** Enter the Bank Name of credit card.
 - **Is Active** Checkbox: When it is checked, the terminal is active.
 - **Financial Account:** Select the financial account of the particular bank or any other bank account.
 - Click on **Create**.
- Repeat the **Step I** to add all the terminals which you have. After adding all terminals, the screen looks like this.
 - Select any one terminal and click on **OK**.



Name	Credit Card Terminal Number	Bank Name	Is Active	Account Name
Axis Bank Terminal	1	Axis Bank	Yes	1000652326 (B-Axis) A/c
ICICI Bank Terminal	2	ICICI Bank	Yes	52464564 (B-ICICI) A/c

Total Records : 2

- **Commission %:** Enter the commission percentage, if it is applicable on the card payment. When you chose to not take commission from customer, the commission amount is included in the **Invoice Amount**.
 - **Amount:** Here the commission amount will be displayed.
6. You can see the **Pay Now** screen as shown below with **Card Amount** and **Commission Amount** in that invoice. Click on **Save**.

Pay Now Invoice Number : HD-00043

Customer Info: Customer: Satish G, Sales Executive: Uma M, Available Credit Limit: 50,000.00, Customer Email: satishg@gmail.com, Customer Mobile Number: 75757575

Invoice Info: Total Before roundoff: 5,547.00, Roundoff Amount: 0.00, Total: 5,547.00, Quantity Total: 3, Number of Items: 3, Discount Included: 0.00, Tax Included: 398.49

Tax Details: Service Tax@5.5%: 188.00, VAT@14.5%: 202.49

Payment Detail: Cash, Card, Cheque, Store Credit, Advance Amount, Approved Pending, Gift Card, Bank Transfer, Food Coupon

Card Payment: Amount: 5,547.00, Card Holder Name: Satish, Bank Name: ICICI, Approval Number: 2456, Payment Gateway: ICICI Bank Terminal, Commission: 2 % Amount 110.94, Final Total: 5,657.94

Pending Amount: 0.00, Credit Card: 5,657.94

Note: Goods Delivered: Print Delivery Challan:

Total Commission Expense: 110.94, Total Received Amount: 5,657.94, Outstanding Balance: 0.00

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





Note: As you are taking commission from customer, the Commission Amount is shown separately from the invoice amount. The Total credit card amount is the sum of invoice amount and commission.

7. You can see the Pay Now screen as shown below, when you are not taking any commission from customer.

The commission amount is included in the invoice amount.

Pay Now Invoice Number : HD-00049

Customer Info
Customer: Satish G | Sales Executive: Uma M
Available Credit Limit: 50,000.00 | Customer Email: | Send email to Customer
Customer Mobile Number: | Send sms to Customer

Invoice Info
Total Before roundoff: 5,547.00 | Quantity Total: 3
Roundoff Amount: 0.00 | Number of Items: 3
Total: 5,547.00 | Discount Included: 0.00
Tax Included: 398.49

Tax Details
Service Tax@5.5%: 188.00
VAT@14.5%: 202.49

Payment Detail
Cash | **Card** | Cheque | Store Credit | Advance Amount | Approved Pending | Gift Card | Bank Transfer | Food Coupon
Amount: 5,547.00 | Card Holder Name: Satish G | Bank Name: Axis Bank | Approval Number: 112 | Payment Gateway: Axis Bank Terminal
Commission: 2 % Amount 110.94

Pending Amount: 0.00
Credit Card: 5,547.00

Note: | Pick Message | Total Commission Expense: 110.94
Goods Delivered: | Print Delivery Chalan: | Total Received Amount: 5,547.00
Returnable Balance: 0.00
Save Returnable Amount as Customer Advance (F4):

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