

How to manage workflow of customer item?



HDPOS smart Tutorials

To manage workflow of customer item, you need to follow below steps:

1. Run **HDPOS smart**. Click on **Set-up** button from **Main Screen**.

HDPOS Smart

HD Tailoring & Alteration Shop
Site#167, Hyper Drive lane, 2nd Cross, Sobha Apartment
Road, Sarjapur ORR, Bangalore, Karanata, 560103.
Login : HDAdmin Cash Register : 01 - Manager's Drawer

Invoice #: HDJ00001 Date: 15/12/2016

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
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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 : 0.00

Discount Included : 0.00

Quantity Total : 0

Customer :
Sales Executive :

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

Set-Up

2. Go to 4th Page, click on **Customer Receipt** icon. From **Manage Customer Receipt** screen, select customer of which you want to manage workflow and click on **Edit Customer Receipt** button.





The screenshot shows the 'Manage Customer Receipt' window. At the top, there are navigation icons: a plus sign, a left arrow, a right arrow, and a minus sign. Below these are date filters: 'From Date: 15/12/2016' and 'To Date: 15/12/2016', with an 'Apply Date' checkbox. A search bar is also present. The main area contains a table with the following data:

Customer Receipt Number	Customer Name	Customer Code	Date	Mobile Number	Email	Received By
HD-CR00003	Kirti Saha	C00003	15/12/2016 05:10 PM			HDAdmin
HD-CR00002	Rahul Sharma	C00002	15/12/2016 05:09 PM			HDAdmin
HD-CR00001	Sangita Parida	C00001	15/12/2016 04:34 PM			HDAdmin

The sidebar on the left contains various icons for different functions: Settings, Estimates, Deliveries, Data Movement, Make Plans, Customer Items, Customer Rece... (highlighted), SMS, Databases, Access Requests, Schedules, AMC Managem..., Tax Structura, Companies, CR Sessions, and Balance Sheet. At the bottom, there are buttons for 'Backup Database', 'Restore Database', 'Go Back To Main Screen', 'About Us', and 'Feedback'. The status bar at the bottom right indicates 'Total Records : 3'.

3. In New Customer Receipt window click on **Edit Customer Item**.





Edit Customer Receipt

Select Business Location : HD Tailoring & Alteration Shop

Customer Receipt Number : HD-CR00001 Date : 15/12/2016

Customer : Sangita Parida

Show Images

+ [Pencil] [Lightbulb] -

Customer Item Code	Item Name	Quantity	Shoulder Length	Salware or Pant Colour	Chest	Waist	Ankle
CI00001	Dress Material	1.00	14	Sky	32	28	

Note :

Pick Message

Change Quantity F2

Number of Receipts to Print : 1

Update & Print (F5) Update (F8) Cancel

4. In **Edit Customer Item Details** screen, under **Work flow** section, click on **Change Status** button to add workflow.





Edit Customer Item Details

Customer Name : Sangita Parida
Item Code : CI00001 Auto-Generate Define my own
Name : Dress Material
Description : Bandhani Dress Material 3 Pieces Pick Message
Instruction : Stich a kruta and salware Pick Message
Business Location : HD Tailoring & Alternation Shop
Godown :
Notes : Date : 15/12/2016
Creator : HDAdmin
Customer collect after 15 days. Notes...

Change Photo Remove Photo

Billable Items **Used Up Items**

Barcode :
Item Name :
Total Quantity : 3.00 Total Amount : 750.00

Godown	Item code	Item Name	Price	Quantity
HD Tailoring ...	T00003	Button	50.00	
HD Tailoring ...	T00002	Cotton	200.00	
HD Tailoring ...	T00001	Stiching Price	500.00	

User Field List Attachments Customer User Field List Customer Attachments **Workflow**

Quality	Status
1.00	Received

Update & Print (F5) Update (F8) Cancel

5. Give a new status and click on **OK**. You can also send an email or SMS to customer regarding the status.





Change Status

Status Change

Quantity : 1

New Status : **Stiching Done**

Comments : Stiching is completed.

Customer Details

Customer Name : Sangita Parida

Customer Email : sangita@abc.com Send email to Customer

Customer Mobile Number : 9999999999 Send sms to Customer





Specify the Template : Hello [CustomerName], Your dress is ready to Pick up.

[CustomerName]
[Status]
[LocationMobileNumber]
[TelephoneNumber]
[Email]
[BusinessLocationName]
[BusinessLocationAddress 1]
[BusinessLocationAddress 2]

OK Cancel

You can see the new status as shown below.

User Field List | Attachments | Customer User Field List | Customer Attachments | WorkFlow

Quantity	Status
1.00	Stiching Done





6. Click on **Update**.

Customer Name : Sangita Parida
Item Code : CI00001
Name : Dress Material
Description : Bandhani Dress Material 3 Pieces
Instruction : Stich a kruta and salware
Notes : Date : 15/12/2016
Creator : HDAdmin
Customer collect after 15 days.

Business Location : HD Tailoring & Alteration Shop
Godown :
Total Quantity : 3.00
Total Amount : 750.00

Godown	Item code	Item Name	Price	Qua
HD Tailoring ...	T00003	Button	50.00	
HD Tailoring ...	T00002	Cotton	200.00	
HD Tailoring ...	T00001	Stiching Price	500.00	

Quantity | Status
1.00 | Stiching Done

Update & Print (F5) | Update (F8) | Cancel

Note: When you receive customer item then system generated status is **received** by default. When you make invoice of that customer item then system generated status is **delivered** by default.

