

How to use customer's Store Credit to make a sales invoice?



HDPOS smart Tutorials

Using customer's store credit to make a sales invoice means:

- In past, while making a sales return ---- instead of returning cash to customer you have issued store credit. Now you are making a new sales invoice for the same customer using his/her store credit.
- For example: Customer1 has store credit of Rs.200. Now you are making a new invoice which is Rs.500 so at the payment time first you would need to select amount Rs.200 from his store credit and remaining amount he can pay by any mode of payment.

Follow the steps given below to do this.

1. Run **HDPOS smart**.
2. On the main invoice screen, select items to make an invoice.
3. Select **Customer** name and click on **Pay Now** button.

The screenshot shows the HDPOS smart software interface. The window title is "HDPOS smart". The header displays "HDIT Variety Store" with the address "Green Glen Layout, Sobha Apartment Road, Bellandur, Bangalore, karnataka, 560103." and login information "Login : HDAdmin" and "Cash Register : 01 - Manager's Drawer". The invoice details include "Invoice #: HDI00002" and "Date: 27/08/2014".

S No.	Barcode	Item Name	Qty / Weight	Measuring Unit	Unit Price with Tax	Total with Tax
1	T00009	FROCK	1	Qty	300.00	300.00
2	T00017	Karimbhumi Novel-Premchand	1	Qty	175.00	175.00
3	T00015	Cello Water Bottle	1	Qty	155.33	155.33
4	T00010	MEN'S FORMAL PANT	1	Qty	800.00	800.00

The right-hand panel contains 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)", "Set-Up", "Total: 1,430.33", "Discount Included: 0.00", "Quantity Total: 4", "Customer: Diya", "Sales Executive:", "Express Pay (F5)", "Pay Now (F8)", "Estimate (F11)", and "Save & Print Estimate (Alt F11)". A red arrow points to the "Pay Now (F8)" button, which is also shown in a larger, separate box below the main interface.



Note: To use customer's store credit you must select that customer name while making an invoice.

4. Now to use store credit of customer click on **Store Credit** tab in **Payment Detail** section.
5. You will see store credit amount of customer, enter the amount which you want to use from store credit. (Which means you can use customer's store credit amount either completely or partially)
6. On the right side of 'Pay Now' screen you will see pending amount of invoice.

The screenshot shows the 'Pay Now' window with the following details:

- Invoice Number:** HDH00002
- Customer Info:** Customer: Diya, Sales Executive: (blank), Available Credit Limit: 0.00, Customer Mobile Number: (blank). There are checkboxes for 'Send email to Customer' and 'Send sms to Customer'.
- Invoice Info:** Total Before roundoff: 1,430.33, Roundoff Amount: 0.00, Total: 1,430.33. Quantity Total: 4, Number of Items: 4, Discount Included: 0.00, Tax Included: 17.22. Tax Details: VAT-5.5% 17.22.
- Payment Detail:** Tabs include Cash, Card, Cheque, Store Credit (highlighted with an orange arrow), Advance Amount, Approved Pending, Gift Card, Bank Transfer, Food Coupon. A yellow box shows 'Available Amount: 400.00' and 'Used Amount: 400.00'. To the right, 'Pending Amount: 1,030.33' and 'Store Credit: 400.00' are displayed.
- Bottom Section:** Note field, 'Pick Message' button, Total Commission Expense: 0.00, Total Received Amount: 400.00, Returnable Balance: 0.00, and a checkbox for 'Save Returnable Amount as Customer Advance (F4)'. Action buttons at the bottom include 'Goods Delivered' (checked), 'Print Delivery Challan', 'Save & Print Estimate (F11)', 'Save Estimate (F12)', 'Save & Print (F5)', 'Save (F8)', and 'Cancel'.



7. Now do the payment of pending amount through other mode of payment and then click on **Save** or **Save & Print** button at the bottom of 'Pay Now' screen.

The screenshot shows the 'Pay Now' window with the following details:

- Invoice Number:** HDH00002
- Customer Info:** Customer: Diya, Sales Executive: (empty), Available Credit Limit: 0.00, Customer Mobile Number: (empty). Options for 'Send email to Customer' and 'Send sms to Customer' are present.
- Invoice Info:** Total Before roundoff: 1,430.33, Roundoff Amount: 0.00, Total: 1,430.33. Quantity Total: 4, Number of Items: 4, Discount Included: 0.00, Tax Included: 17.22. Tax Details: VAT-5.5% 17.22.
- Payment Detail:** Pending Amount: 0.00. Payment methods: Cash, Card, Cheque, Store Credit, Advance Amount, Approved Pending, Gift Card, Bank Transfer, Food Coupon. Amount Received: 1,030.33. Store Credit: 400.00, Cash: 1,030.33.
- Summary:** Total Received Amount: 1,430.33, Returnable Balance: 0.00. Total Commission Expense: 0.00.
- Buttons:** Save & Print Estimate (F11), Save Estimate (F12), **Save & Print (F5)** (highlighted with a red box and an orange arrow), Save (F8), Cancel.