



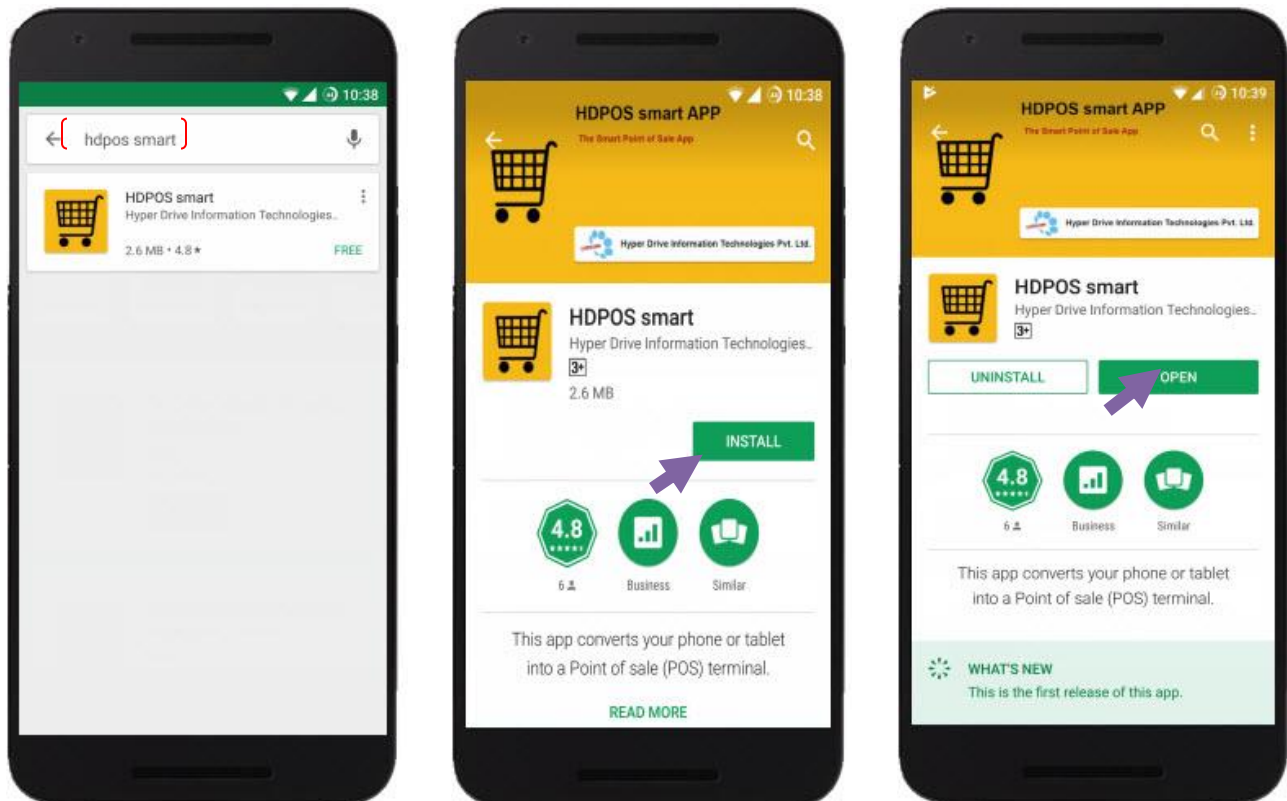
About HDPOS smart App

HDPOS smart app is a companion android app that works with HDPOS smart server. HDPOS App helps you turn your smart phone or tablet into a complete, easy to use, intuitive billing system.

Installation & Registration

Installation

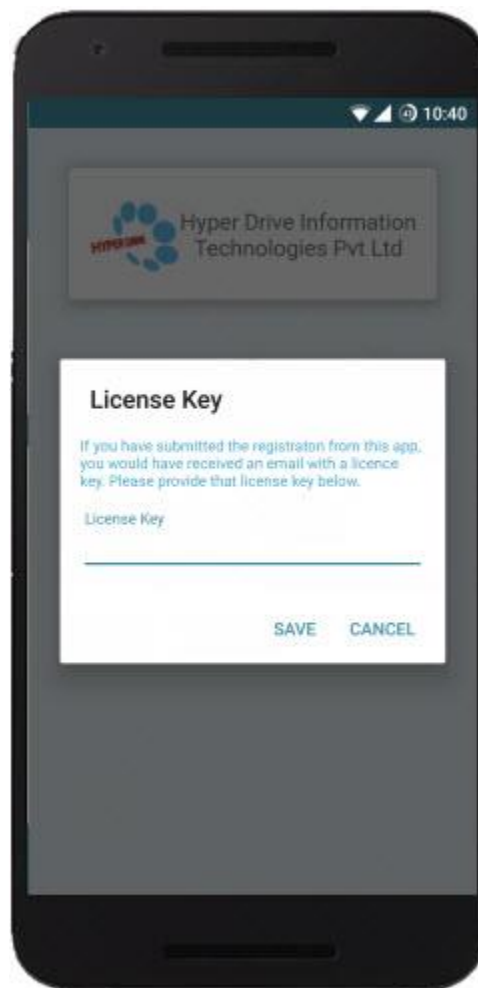
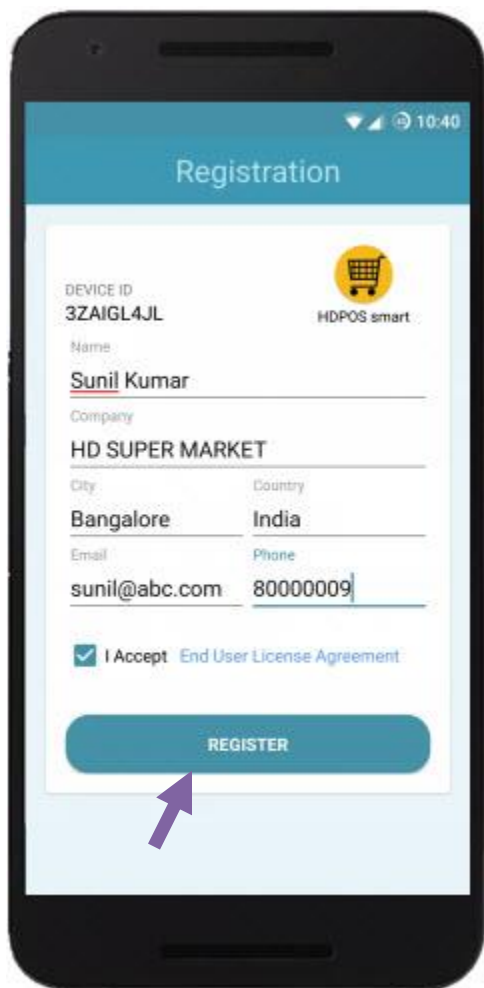
- Open Play Store from your android device.
- Type '**HDPOS smart**' and click on search icon.
- From the resulting list tap on '**HDPOS smart**'.
- Click on Install.
- Click on Open when installation is completed.





Registration

- Open 'HDPOS smart' app, you will be prompted with registration screen.
- Fill the registration details.
- Tap on **Register**.



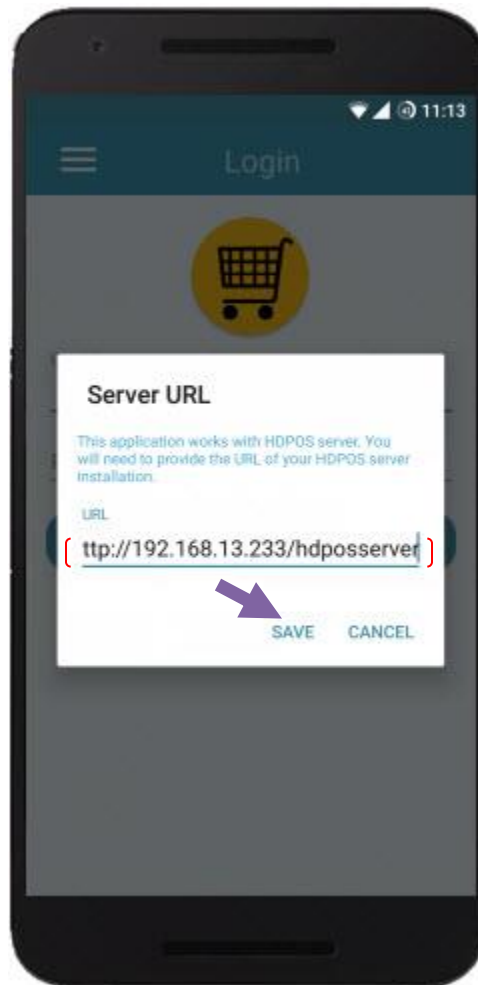
- You'll receive Trail License Key on your registered E-mail id.
- Copy and Paste the key from your E-mail id.





HDPOS smart App

- Next you'll be prompted to enter the Server URL. Enter HDPOS smart server IP address/Server URL. For instance, **http://[ServerIPAddress]/HDPOSServer** or **http://abc.hdpos.biz/**.

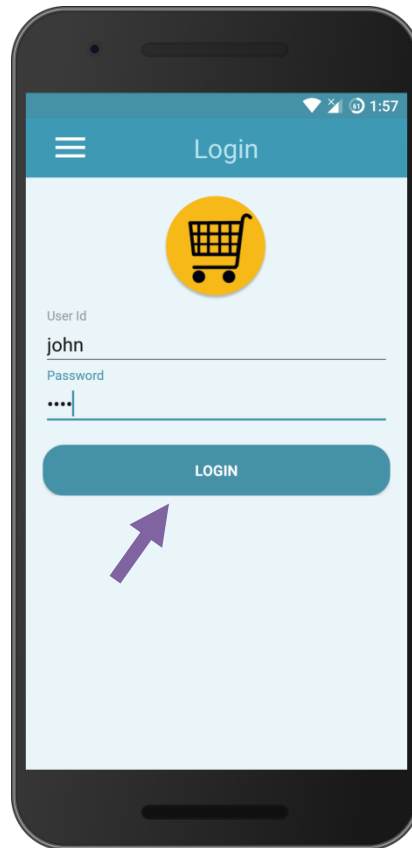


- Tap on **Save**.



Login

- Enter your login credentials (User Name and Password) and tap on Login.



Note 1: To login to HDPOS smart app, you should at least create an employee with user credentials. From windows application, Go to Ser-Up → Select Employee → Enter employee name and User and Password → Click on create. Click on the below link for more details.

<http://www.hdpos.in/tutorials/How-to-add-my-own-Login-and-Password-and-how-do-I-change-the-same>

Note 2: Additionally create a cash register for an employee and assign a login to cash register, for smooth functioning of billing process. From windows application, Go to Set-Up → Select Cash Register → Click on Add Cash Register → Enter the required details and select the login for cash register → Click on Create. Click on the below link for more details.

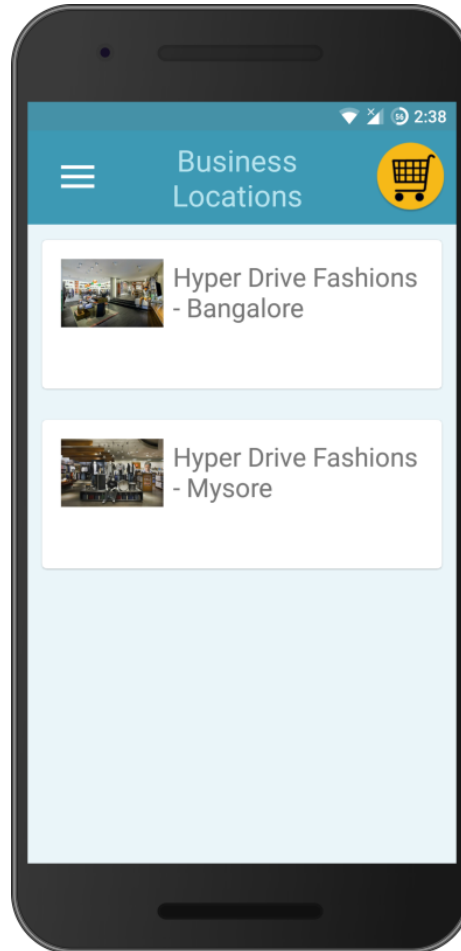
<http://www.hdpos.in/tutorials/How-can-I-assign-a-login-to-a-cash-register>

Note 3: You cannot use default login (**HDAdmin**) with HDPOS smart app.

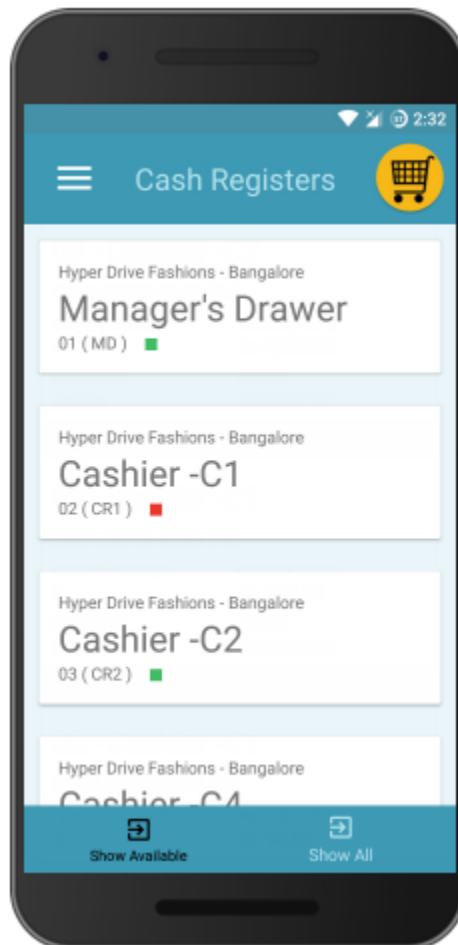


HDPOS smart App

- You'll see a screen asking you to select business location, if you have multiple locations. Select a business location to work with HDPOS smart app.



- Next you'll be prompted with Cash Register selection screen; select the cash register from the available list.



Note 1: If login credentials used is associated with a cash register, you'll not be prompted to select 'Business Location' and 'Cash Register'; you'll be logged with assigned cash register.

Note 2: If prompted with following error, from windows application Go to Set-Up→Select Company→Click on Manage Logins →add the login for the company and update the changes.

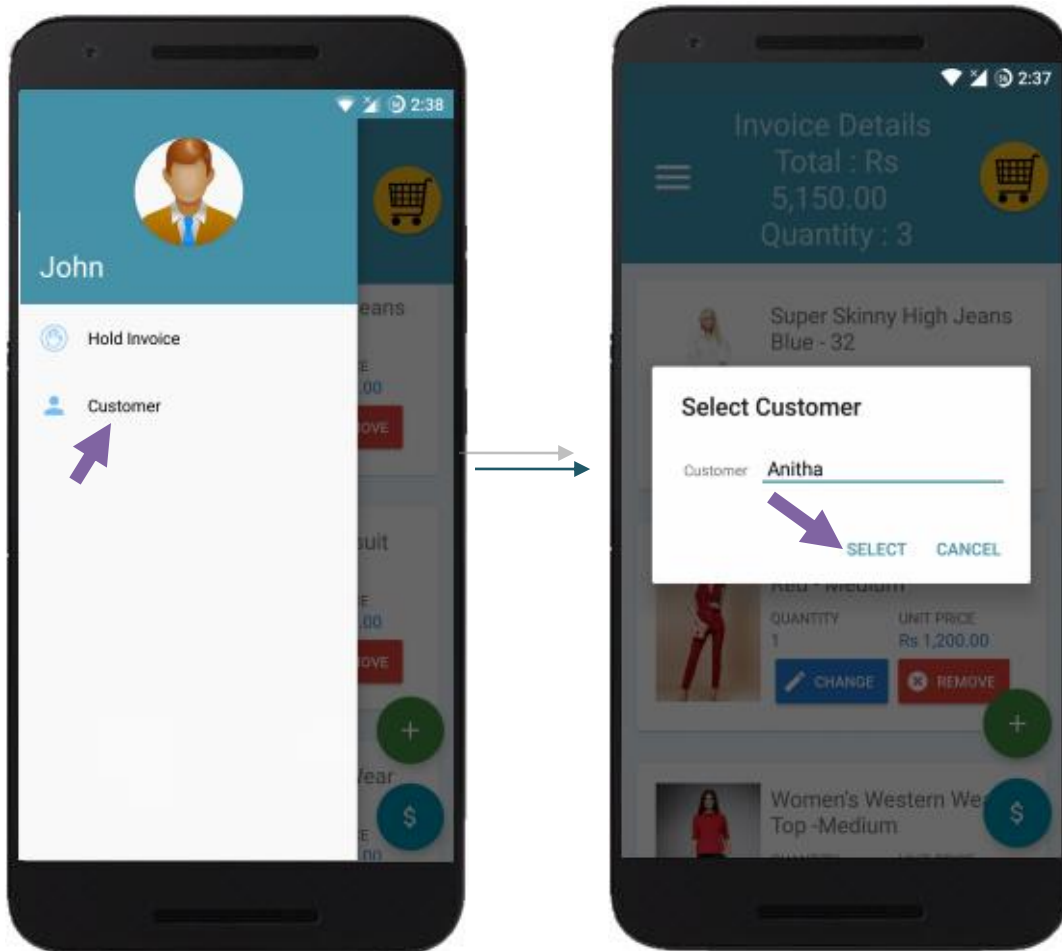




How to make an invoice

1. How to Add Customer for sales invoice

- You'll then direct to Manage Invoices.
- Tap on Menu option, tap on customer, type customer name and select the customer from the list.

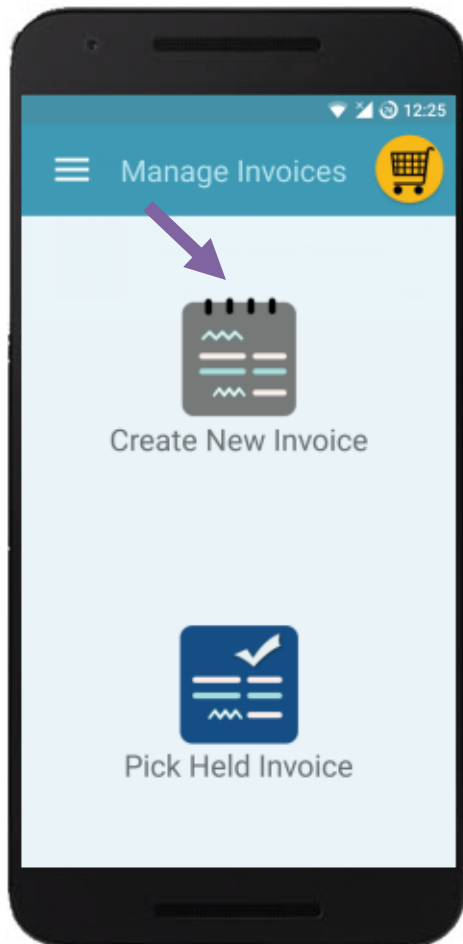


Note 1: You cannot create a new customer in HDPOS smart App. You can only select the existing customers.

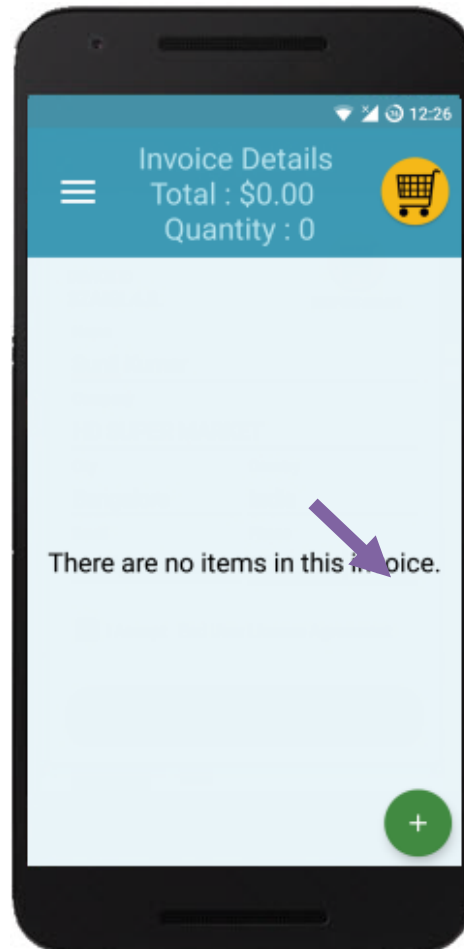


1. Add items to sales invoice

- You'll then direct back to Manage Invoices.
- Tap on Create New Invoice option.

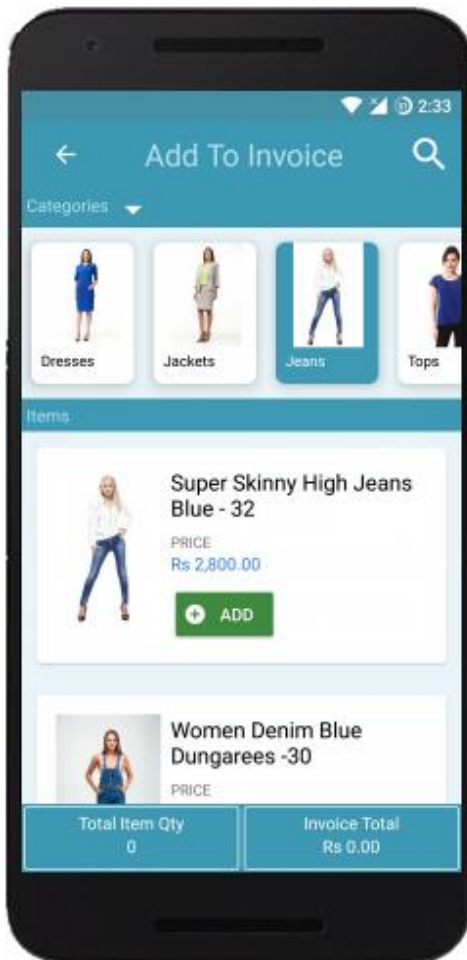


- Tap on + icon to add items to the invoice.

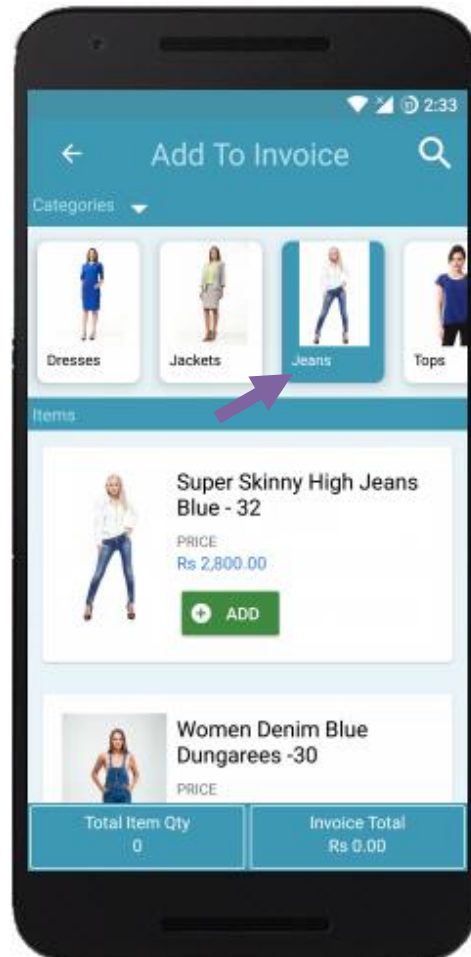




- This displays all categories and items, select the category from the category section.

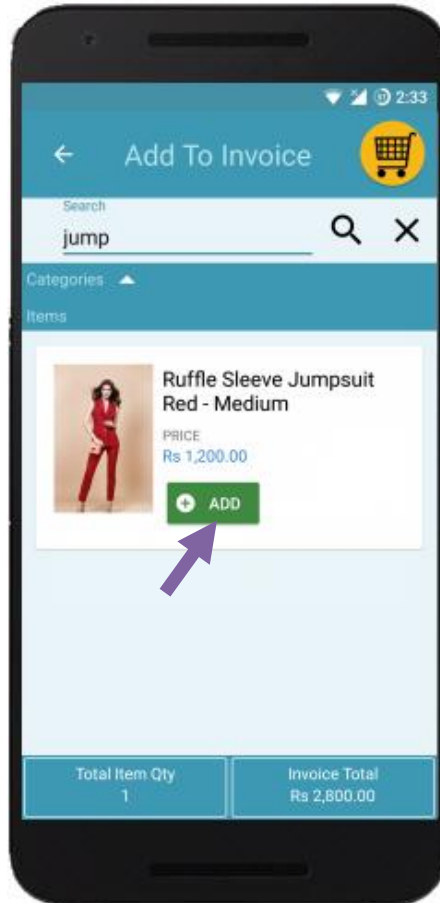


- This filters items based on category selection. Tap on Add option to add the select item to sales invoice.





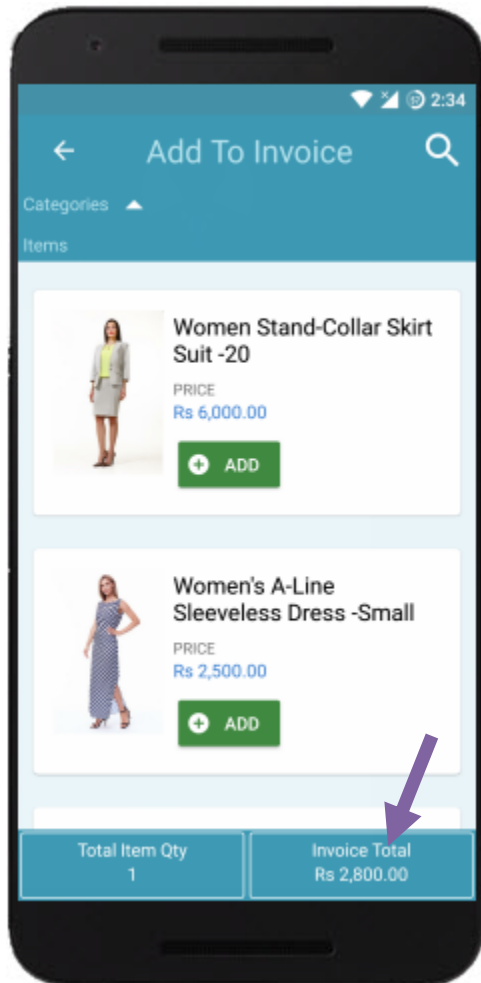
Note: You can search a particular item from a list by typing Item Name, Item Barcode and Item Search Code.



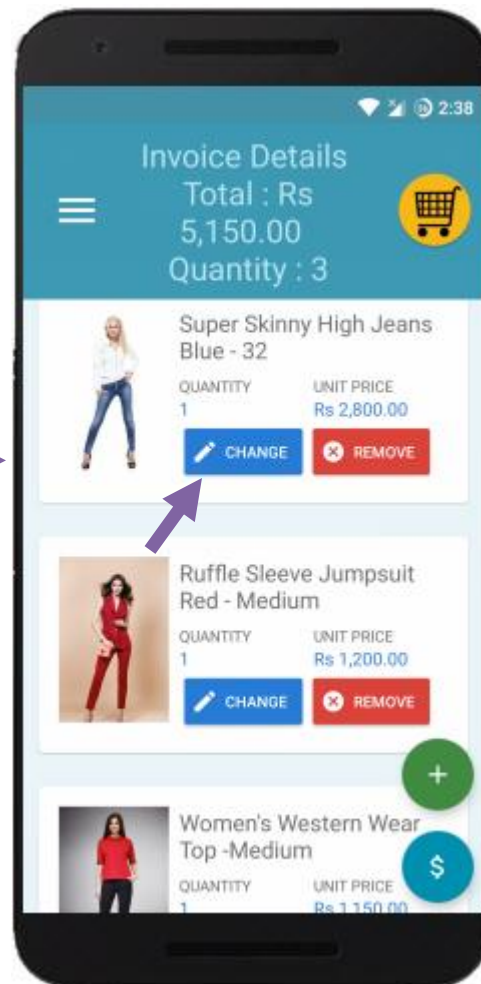


2. How to change item quantity

- To change item quantity tap on Total Item Qty or Invoice Total.

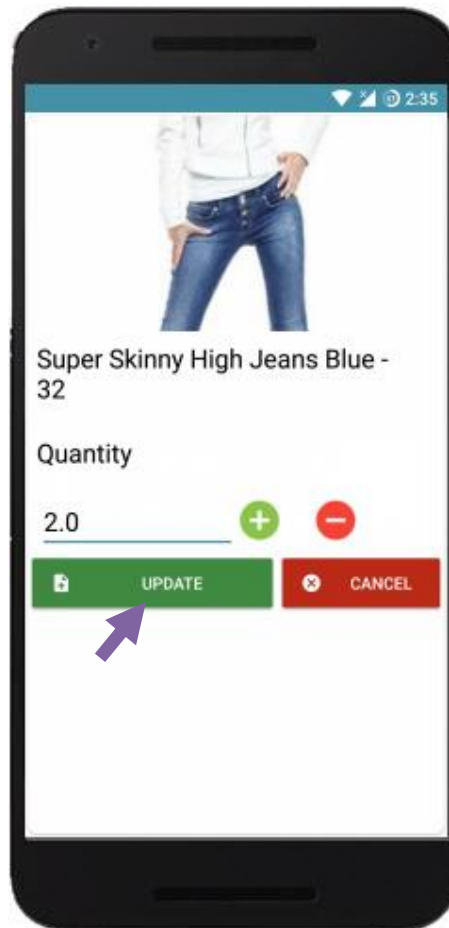


- From Invoice Details screen, tap on Change and enter item quantity.





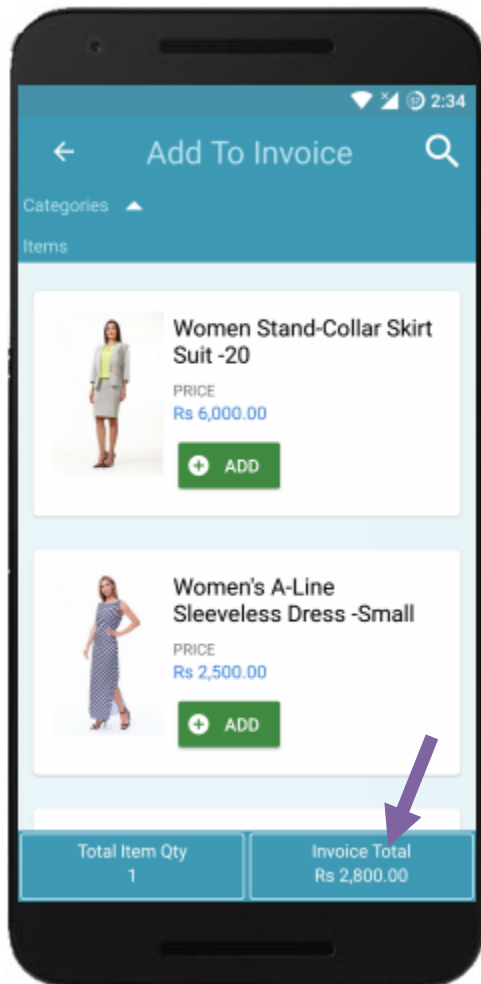
- Tap on Update, you'll then be redirected back to Invoice Details screen, follow same steps to update other items in the invoice.



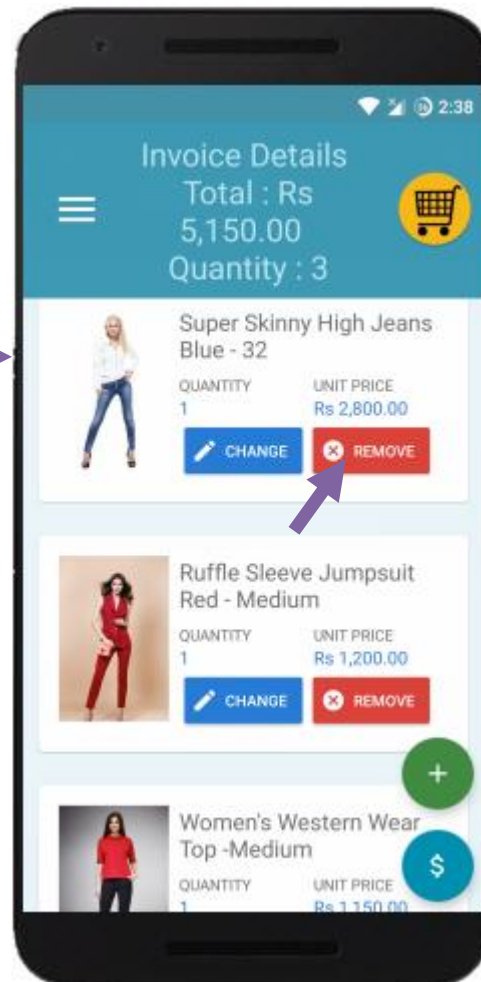


3. How to Remove item from sales invoice.

- To remove an item from running invoice, tap **Total Item Qty** or **Invoice Total**.



- From **Invoice Details** screen, tap on **Remove** option to remove an item from the current sales invoice.

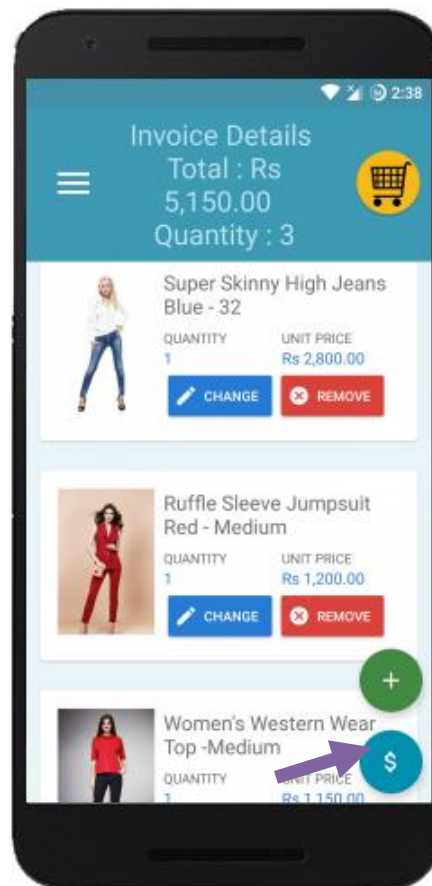




- Follow same steps to update other items in the invoice.

4. Proceed to payment

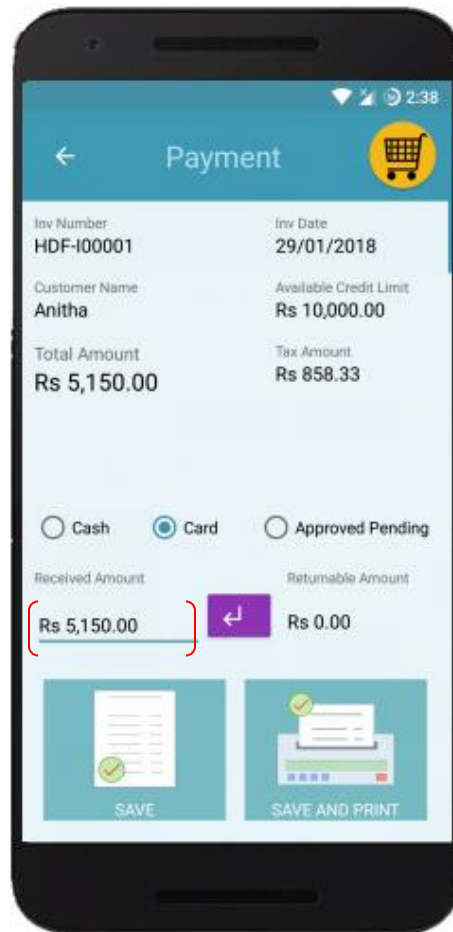
- Tap on back ← arrow from **Add To Invoice** screen.
- If you're in **Invoice Details** screen, tap on ← arrow you'll then taken back to Add To Invoice screen.
- From **Invoice Details** screen, tap on \$ icon to proceed to payment.



- Payment screen displays complete details such as Invoice Total, Invoice Number, Tax included.



- Select the payment mode (cash, card or Approved pending).
- Enter the received amount and tap on **Save** or **Save and Print** to complete the sales invoice.



Note1: To print a sales invoice from the app, you need to set the printer to print the sales invoice from the app. From windows application (HDPOS smart) Go to Settings → from System Settings → Select Invoice → Select Page 2 → In App Settings section of page 2, select the printer you want print the sales invoice from the app.

Note2: To save an invoice with approved pending, you're mandated to select the customer with credit limit.

Note3: You cannot receive payment in multiple payment modes.

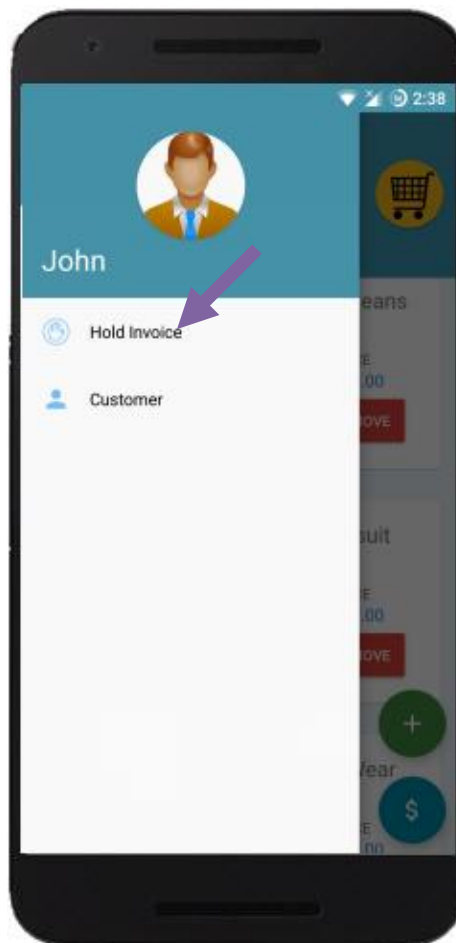


5. You can change customer for sales invoice

- If you have skipped adding a customer to sales invoice before adding items to sales invoice.
- You can select a customer from **Invoice Details** screen, tap on Menu option and select the customer for sales invoice.

6. Hold current Sales Invoice

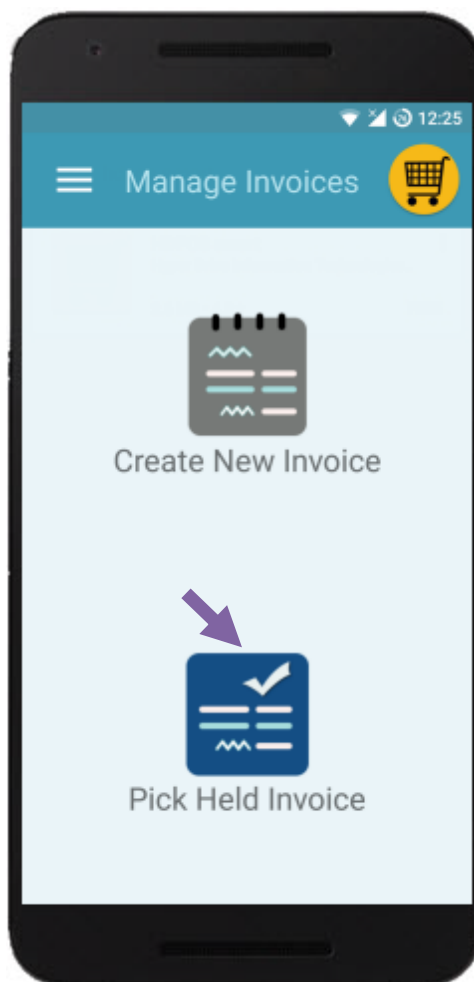
- To hold current in-progress invoice, tap on menu option and select Hold Invoice option.





7. Pick Held Invoices

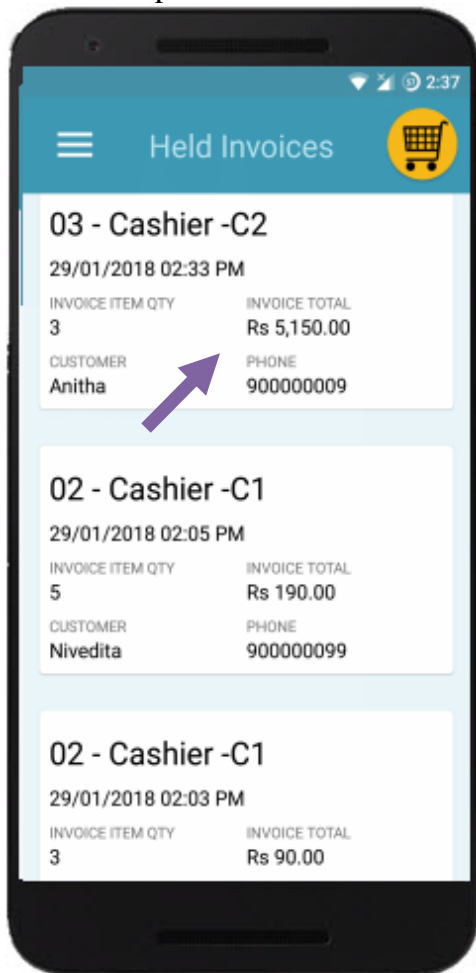
- Tap on Pick Held option from manage invoice screen.



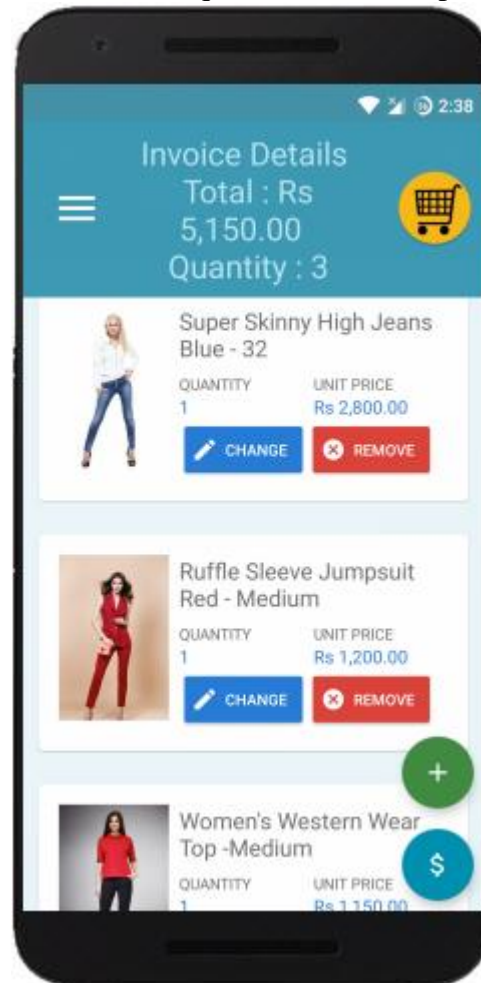
- This displays list of invoice which are held along with invoice details such as Customer Name, Mobile Number and cash register associated with held invoice.



- Tap on held invoice



- You'll then see Invoice Details screen with list of items along with their quantities and unit price.



- To update or remove an item from invoice, tap on 'Change' or 'Remove' respectively.
- To add new items to sales invoice, tap on + option.
- To proceed to payment tap on \$ option
- To change customer, tap on menu option and select the customer.
- To hold back the invoice after making changes, tap on menu option and select Hold Invoice.

