

## How to get started with HDPOSsmart?



HDPOS smart Tutorials

Now that you have installed HDPOSsmart, you would like to get started with the basics of working with the application.

In this document, you get familiar with

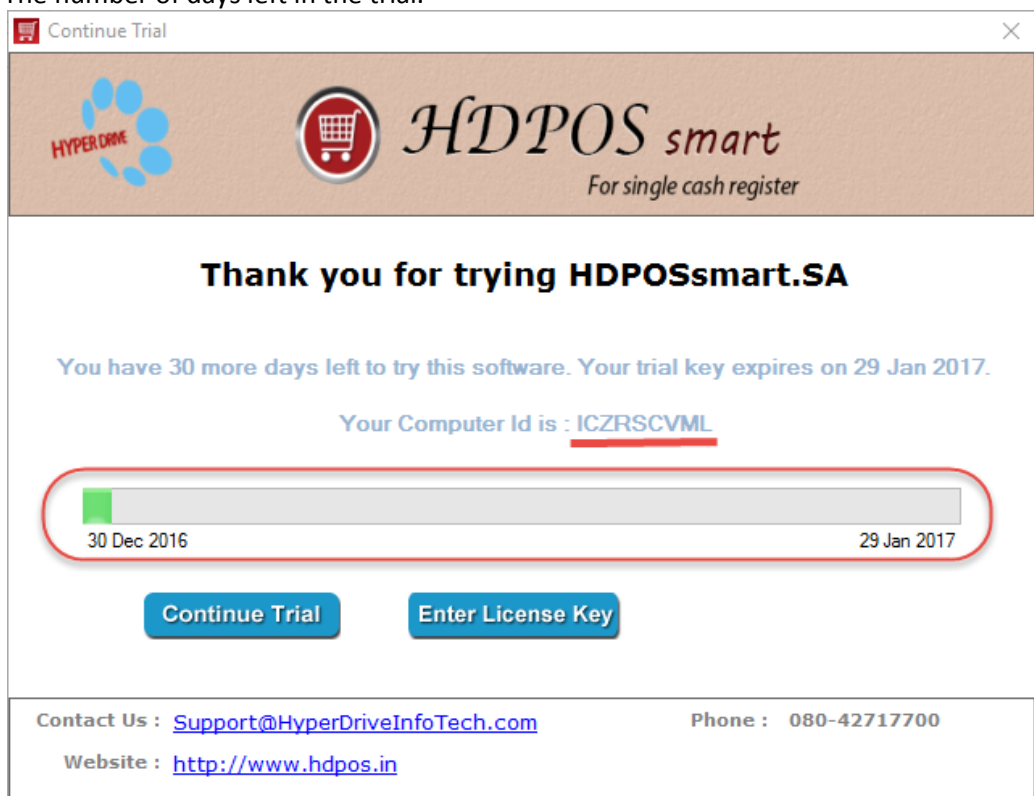
- [Logging in to HDPOSsmart](#)
- [Create your shop \(Business Location\)](#)
- [Get familiar with the Invoice screen](#)

### Login to HDPOSsmart

This is the first step to getting started. Follow the steps given below to login to the application.



1. Double-click on **HDPOSsmart.SA** icon on your desktop
2. This will bring up the '**Continue trial**' screen giving you details of
  - a. Your Computer id
  - b. The number of days left in the trial.

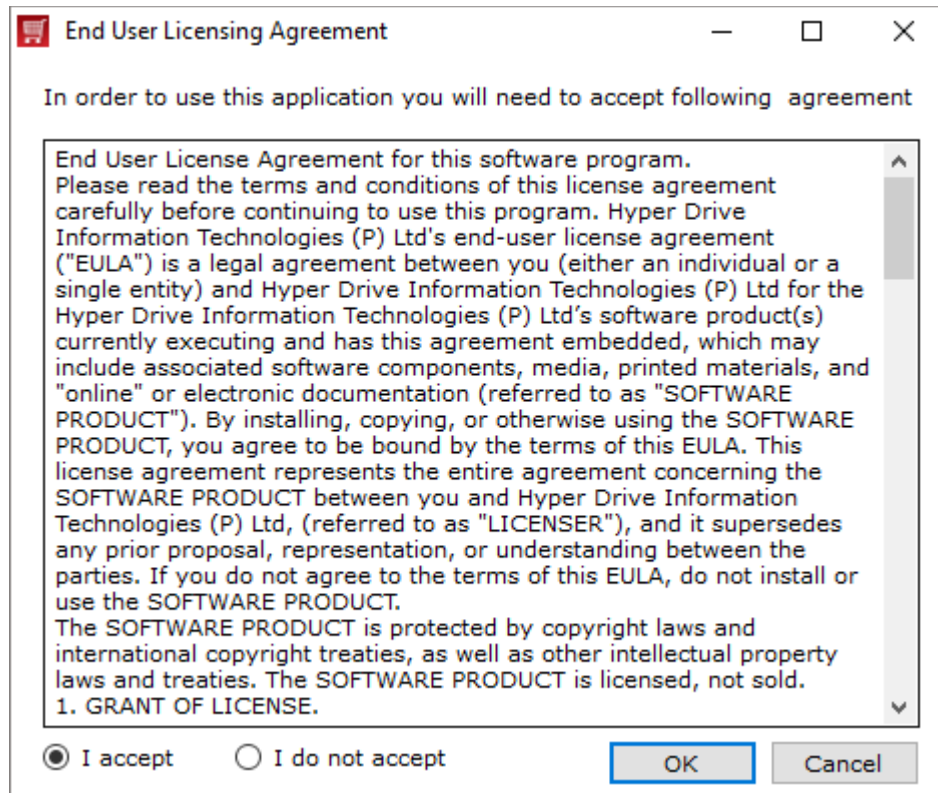


3. Click on **Continue Trial**





4. Read the '**End user license agreement**' and Click on '**I Accept**' to accept the license agreement (You will see this screen only the first time to login to HDPOSsmart.)



5. Click on **OK**
6. Application logs in with the default username and password



**Note:** HDPOSsmart comes shipped with a default login

Username: HDAdmin

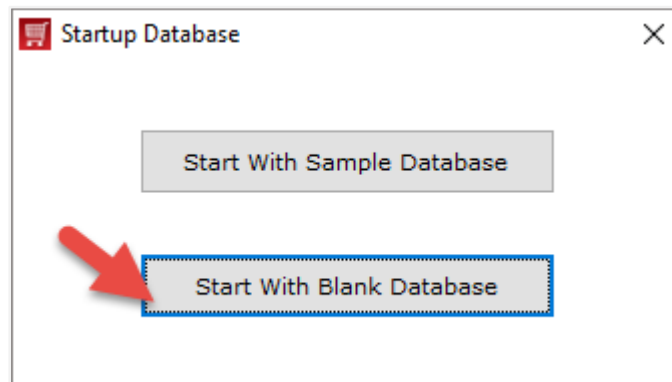
Password: @HDAdmin



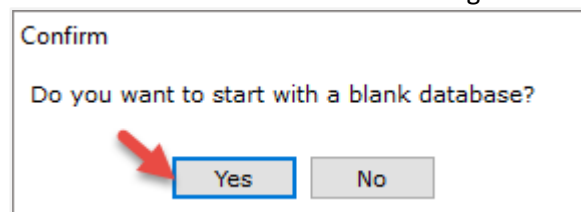


## 7. Select a database

- i. Click on **Start with blank database** to start with a new database.

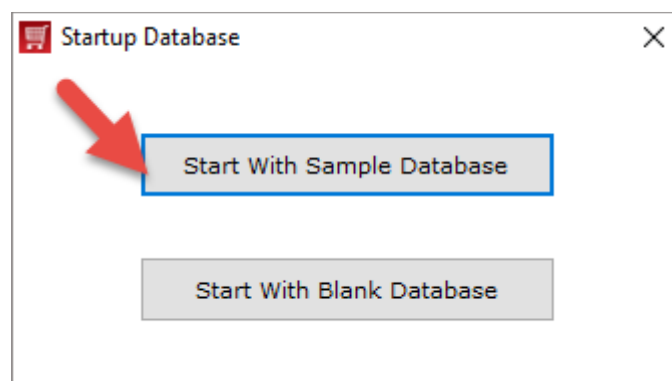


- a. Click on **Yes** in the confirmation message



If you choose to start with a new database, all the details such as the shop name, items, customers have to be entered manually

- ii. Click on **Start with sample database** to start with one of the sample databases



- a. Choose the most relevant business type on the left panel
    - b. Select from available databases
    - c. Read description to understand what the database is about, and to check if that matches with your requirements.
    - d. Select the download file – the one with '.bak' file extension
    - e. Click on **Download and Apply**



**Sample Databases**

**Select Your Business Type**

Business Type

- All Business Types
- Agricultural Store
- Appliances Store**
- Automobiles
- Book Store
- Computer Peripherals
- Dry Fruits Store
- Electrical Store
- Fabric Store
- Furniture Store
- Garment Store
- Grocery Store
- Imitation Jewelry Store
- Mobile Phone Shop
- Optical Store
- Patanjali Store
- Pet Shop
- Pizza Parlor
- Quick service restaurants (QSR)
- Restaurant

Database Name	Sub Business Type	Language	Version	Last Updated Date
Appliances Store	Appliances Store	English	3801	15/06/2016 01:13 AM

Total Records : 1

**Description**

Sample POS Database for managing Electrical and Electronics Appliances store.

This HDPOS database is set up with multiple levels of categories to manage large number of items. Items in this database are set up to have serial number so that you manage AMC (Annual Maintenance Contract) . You can also check if the device is covered under warranty while taking it back for repairs. You can also see how AMC can be sold using HDPOS.

This database also shows the settings for Financing agencies so that you can evaluate the functionality of taking payments from financing agencies like Bajaj Finance on behalf of your customers.

**Downloads**

- Appliances Store.bak**
- Appliances Store.rar
- Appliances Store.zip

**Download and Apply**

**Download Only**

**Browse...**

**Drag & Drop Database File Here From Local Computer**

**Open Website** **Close**

- f. While the database is downloaded and restored, progress bar is displayed

**Download in progress**

Downloading the file, please wait...

- g. Once complete, a message is displayed informing you the about the completion of the database restoration

**Restore Success**

Database is restored successfully. You will need to now restart the application. Click OK button to close "HDPOsmart.SA" now.

**OK**

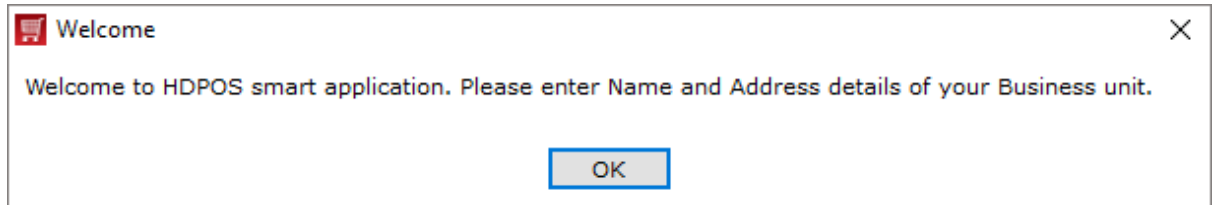
- h. Click on **OK** to restart the application



## Create your shop (Business Location)

Shop or Business Location is the definition of your Physical location. You are required to create a business location before using the application if you started with a blank database.

1. The first time you login to HDPOSsmart when you are starting with a blank database, you will be prompted with a message as shown below:



Click on **OK** to enter details of your shop.

2. Enter the details of your business location/shop as required.

**Add New Company**

**Business Location Details**

Company Name : Hyper Drive Retail Pvt. Ltd.

Shop Name (Business Location) : Hyper Drive Super Market

Prefix for Documents : Hyp

Start Number for all documents : 00001

TIN Number : 10000000001

Address Line 1 : Hyper Drive Lane, Green Glen Layout

Address Line 2 : Bellanduru, Outer Ring Road

City : Bengaluru

State : Karnataka

Country : India

Pin : 560103

Phone No : 080-42717700

Mobile No : 9990652522

E Mail : support@hyperdriveinfotech.com

Website : hdpos.in

Business Location TIN No : 10000000001

ESIC No :

LBT No :

CST No :

PT Registration No :

Fax No :

Service Tax No :

[Change Photo](#) [Remove Photo](#)

**Document Settings**

Printer Setting : Default\_Laser

SMS Setting : Default

☒ Enable Email Email Setting : Default

Email Template Setting :

**Additional Receipt Settings**

☐ Print second receipt on different printer ☐ Ask to print everytime

Second Receipt Printer :

Second Receipt Print Format :

Number of second receipts to print : 1 Additional Receipt Printers

**Move Stock Setting**

☐ Move stock of deleted invoices to a specified godown.

Godown to keep stock of deleted invoices :

Attachments

Create (F8) Cancel





### 3. Click on **Create**

## Getting familiar with Invoice Screen

On logging-in, the window that is displayed is the 'main invoice screen'. All the billing is done here.

Here's a quick look list of areas in Main Screen that we will cover in this document:


- i. [Name and address of your shop](#)
- ii. [Item Selection](#)
- iii. [View of Selected Items](#)
- iv. [General Functionality Options](#)
- v. [Totals & Discounts](#)
- vi. [Customer Details](#)
- vii. [Sales Executive Details](#)
- viii. [Tool bar Buttons](#)
- ix. [Payment Options](#)
- x. [Offer Details](#)

### i. Name and Address of your shop

The name and address of your shop is displayed on the top left corner of the window. Also, the cash register and the login being used is also displayed.







**Hyper Drive Super Market**  
Site#167, Hyper Drive lane, 2nd Cross, Sobha Apartment  
Road, Sarjapur ORR, Bellandur, Bengaluru, Karnataka  
**HDPOS smart** Login : HDAdmin Cash Register : 01 - Manager's Drawer

Invoice #: Hyp-100007 Date : 02/01/2017  
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	T00118	B B Royal Sona Masoori Raw Rice, 10 k...	1	Qty	470.00	470.00
2	T00132	HD Sugar, 1Kg Pack	1	Qty	0.00	0.00
3	T00103	Amul Pure Ghee, 1 ltr Carton	1	Qty	390.00	390.00
4	T00010	Fresho Carrot - Sliced, 200 gm	1	Qty	17.00	17.00
5	T00001	Fresho Onion 1Kg	3	Qty	16.00	48.00
6	T00096	B B Popular Kabuli Channa, 200 gm Pou...	1	Qty	25.00	25.00
7	T00123	B B Royal Jaggery Round Sulphur Free, ...	1	Qty	25.00	25.00
8	T00132	HD Sugar, 1Kg Pack	4	Qty	55.00	220.00
9	T00115	B B Royal Cardamom,100gm Pouch	1	Qty	135.00	135.00
10	T00111	B B Royal Red Chilli/Lal Mirch, 200 gm ...	2	Qty	65.00	130.00
11	T00049	Henko Detergent Bar, 400 gm	4	Qty	40.00	160.00

There are no offers applied to the selected item.

Following offers are applied:  
Received 1 free "HD Sugar, 1Kg Pack".

Change Quantity F2

Remove Item F4

Show Stock

Hold Invoice F6

Pick Held Invoice F7

Cancel Invoice F10

Show Tax Details

Hide Offer Details F12

Set-Up

Total : 1,620.00

Discount Included : 55.00

Quantity Total : 20

Customer :

Sales Executive :

Express Pay (F5)


Pay Now (F8)

Estimate (F11)

Save & Print Estimate (Alt F11)

## ii. Item Selection

You select the items for billing here. Items can be selected either by using item name, barcode, or search code.



**Hyper Drive Super Market**  
Site#167, Hyper Drive lane, 2nd Cross, Sobha Apartment  
Road, Sarjapur ORR, Bellandur, Bengaluru, Karnataka  
**HDPOS smart** Login : HDAdmin Cash Register : 01 - Manager's Drawer

Invoice #: Hyp-100007 Date : 02/01/2017  
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	T00118	B B Royal Sona Masoori Raw Rice, 10 k...	1	Qty	470.00	470.00
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There are no offers applied to the selected item.

Following offers are applied:  
Received 1 free "HD Sugar, 1Kg Pack".

Change Quantity F2

Remove Item F4

Show Stock

Hold Invoice F6

Pick Held Invoice F7

Cancel Invoice F10

Show Tax Details

Hide Offer Details F12

Set-Up

Total : 1,620.00

Discount Included : 55.00

Quantity Total : 20

Customer :

Sales Executive :

Express Pay (F5)

Pay Now (F8)

Estimate (F11)

Save & Print Estimate (Alt F11)





### iii. View of Selected Items

The items that are scanned for billing are displayed here.

Hyper Drive Super Market  
Site#167, Hyper Drive lane, 2nd Cross, Sobha Apartment Road, Sarjapur ORR, Bellandur, Bengaluru, Karnataka  
Login : HDAdmin Cash Register : 01 - Manager's Drawer

Invoice #: Hvp-100007 Date : 02/01/2017  
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	T00118	B B Royal Sona Masoori Raw Rice, 10 k...	1	Qty	470.00	470.00
2	T00132	HD Sugar, 1Kg Pack	1	Qty	0.00	0.00
3	T00103	Amul Pure Ghee, 1 ltr Carton	1	Qty	390.00	390.00
4	T00010	Fresho Carrot - Sliced, 200 gm	1	Qty	17.00	17.00
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7	T00123	B B Royal Jaggery Round Sulphur Free, ...	1	Qty	25.00	25.00
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There are no offers applied to the selected item.

Following offers are applied:  
Received 1 free "HD Sugar, 1Kg Pack".

Total : 1,620.00  
Discount Included : 55.00  
Quantity Total : 20  
Customer :  
Sales Executive :  
Express Pay (F5) Pay Now (F8) Estimate (F11) Save & Print Estimate (Alt F11)

### iv. General Functionality Options

You can perform numerous operations on the invoice being created, such as changing the quantity of an item added for invoicing, cancelling the invoice, etc., using the 9 general functionality buttons.

Hyper Drive Super Market  
Site#167, Hyper Drive lane, 2nd Cross, Sobha Apartment Road, Sarjapur ORR, Bellandur, Bengaluru, Karnataka  
Login : HDAdmin Cash Register : 01 - Manager's Drawer

Invoice #: Hvp-100007 Date : 02/01/2017  
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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3	T00103	Amul Pure Ghee, 1 ltr Carton	1	Qty	390.00	390.00
4	T00010	Fresho Carrot - Sliced, 200 gm	1	Qty	17.00	17.00
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6	T00096	B B Popular Kabuli Channa, 200 gm Pou...	1	Qty	25.00	25.00
7	T00123	B B Royal Jaggery Round Sulphur Free, ...	1	Qty	25.00	25.00
8	T00132	HD Sugar, 1Kg Pack	4	Qty	55.00	220.00
9	T00115	B B Royal Cardamom, 100gm Pouch	1	Qty	135.00	135.00
10	T00111	B B Royal Red Chilli/Lal Mirch, 200 gm ...	2	Qty	65.00	130.00
11	T00049	Henko Detergent Bar, 400 gm	4	Qty	40.00	160.00

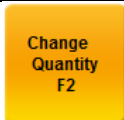



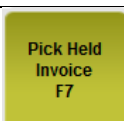
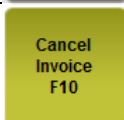
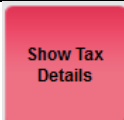
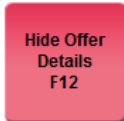

There are no offers applied to the selected item.

Following offers are applied:  
Received 1 free "HD Sugar, 1Kg Pack".

Total : 1,620.00  
Discount Included : 55.00  
Quantity Total : 20  
Customer :  
Sales Executive :  
Express Pay (F5) Pay Now (F8) Estimate (F11) Save & Print Estimate (Alt F11)





	<b>Change Quantity (F2):</b> This option allows you to change quantity of the selected item.
	<b>Remove Item (F4):</b> Clicking on this button will remove the selected item from the invoice screen.
	<b>Show Stock:</b> ON clicking this button, the stock of the item in all godowns/warehouses is displayed for the selected item.
	<b>Hold Invoice (F6):</b> Clicking this button will put the invoice in held state. You can create one or more invoices, and later continue billing with the held invoice.
	<b>Pick Held Invoice (F7):</b> This allows you to 'pick' one of the held invoices and continue billing with that.
	<b>Cancel Invoice (F10):</b> Clicking on this button will cancel the ongoing invoice.
	<b>Show Tax Details:</b> Columns with tax details of the items in the invoice are displayed on clicking this button.
	<b>Hide offer details (F12):</b> All applicable and the applied offers are displayed in the 'offers' section in the lower part of the screen. To hide this section, click on this button. Clicking this will replace the button with ' <b>Show Offer Details</b> ', clicking on which will again display the section
	<b>Setup:</b> Clicking this button takes you to the setup window, where all the administrative tasks are performed.

#### v. Totals and Discounts

This section of the main invoice screen provides the details about the total amount of the invoice, the discount included and the total quantity of all items in the invoice.

<b>Total :</b>	<b>1,620.00</b>
Discount Included :	55.00
<u>Quantity Total :</u>	20

- Total:** The grand total of invoice after the application of discounts, and inclusive of tax.
- Discount included.** This shows the total discount amount included in the invoice.
- Quantity Total:** This displays the total quantities/pieces of the items being invoiced.





## vi. Customer Details

The customer selected for the invoice is displayed in the bottom right section of the window.

**Hyper Drive Super Market**  
Site#167, Hyper Drive lane, 2nd Cross, Sobha Apartment Road, Sarjapur ORR, Bellandur, Bengaluru, Karnataka  
Login : HDAdmin Cash Register : 01 - Manager's Drawer

Invoice #: Hvp-100007 Date : 03/01/2017

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	T00118	B B Royal Sona Masoori Raw Rice, 10 k...	1	Qty	470.00	470.00
2	T00132	HD Sugar, 1Kg Pack	1	Qty	0.00	0.00
3	T00103	Amul Pure Ghee, 1 ltr Carton	1	Qty	390.00	390.00
4	T00010	Fresho Carrot - Sliced, 200 gm	1	Qty	17.00	17.00
5	T00001	Fresho Onion 1Kg	3	Qty	16.00	48.00
6	T00096	B B Popular Kabuli Channa, 200 gm Pou...	1	Qty	25.00	25.00
7	T00123	B B Royal Jaggery Round Sulphur Free, ...	1	Qty	25.00	25.00
8	T00132	HD Sugar, 1Kg Pack	4	Qty	55.00	220.00
9	T00115	B B Royal Cardamom,100gm Pouch	1	Qty	135.00	135.00
10	T00111	B B Royal Red Chilli/Lal Mirch, 200 gm ...	2	Qty	65.00	130.00
11	T00049	Henko Detergent Bar, 400 gm	4	Qty	40.00	160.00

There are no offers applied to the selected item.

Following offers are applied:  
Received 1 free "HD Sugar, 1Kg Pack".

Customer:  Anthony Dsouza

Customer:  Anthony Dsouza

Total : 1,620.00  
Discount Included : 55.00  
Quantity Total : 20

Customer : Anthony Dsouza  
Sales Executive : Shankar Vasudev

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

You can select any of the customers defined in customer manager using name, mobile number, or customer code. Additionally, you can click on '+' to add a new customer.

Selecting customers allow you to keep track of the sales made to a customer, provide store credits against returns, if any, and also provide items on credit. You can also provide loyalty points to customers if required.

HDPOS also allows for sending email and SMS to customers on creation of invoices. Specifying customers will ease the process by automatically selecting the mobile number and email for SMS and email respectively.



### vii. Sales Executive Details

In Sales executive section, you can select employees. They can be selected to calculate the commission earned by the executive with that sale, or simply to keep track of the sales done by your employees.

**Hyper Drive Super Market**  
Site#167, Hyper Drive lane, 2nd Cross, Sobha Apartment Road, Sarjapur ORR, Bellandur, Bengaluru, Karnataka  
Login : HDAdmin Cash Register : 01 - Manager's Drawer

Invoice #: Hyp-100007 Date : 04/01/2017  
Barcode :  
Item Name :  
Search Code : Search with Stock :

S No.	Barcode	Item Name	Qty / Weight	Measuring Unit	Unit Price with Tax	Total with Tax
1	T00118	B B Royal Sona Masoori Raw Rice, 10 k...	1	Qty	470.00	470.00
2	T00132	HD Sugar, 1Kg Pack	1	Qty	0.00	0.00
3	T00103	Amul Pure Ghee, 1 ltr Carton	1	Qty	390.00	390.00
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11	T00049	Henko Detergent Bar, 400 gm	4	Qty	40.00	160.00

Sales Executive : Shankar Vasudev

Total : 1,620.00  
Discount Included : 55.00  
Quantity Total : 20  
Customer : Anthony Dsouza  
Sales Executive : Shankar Vasudev

Following offers are applied:  
Received 1 free "HD Sugar, 1Kg Pack".

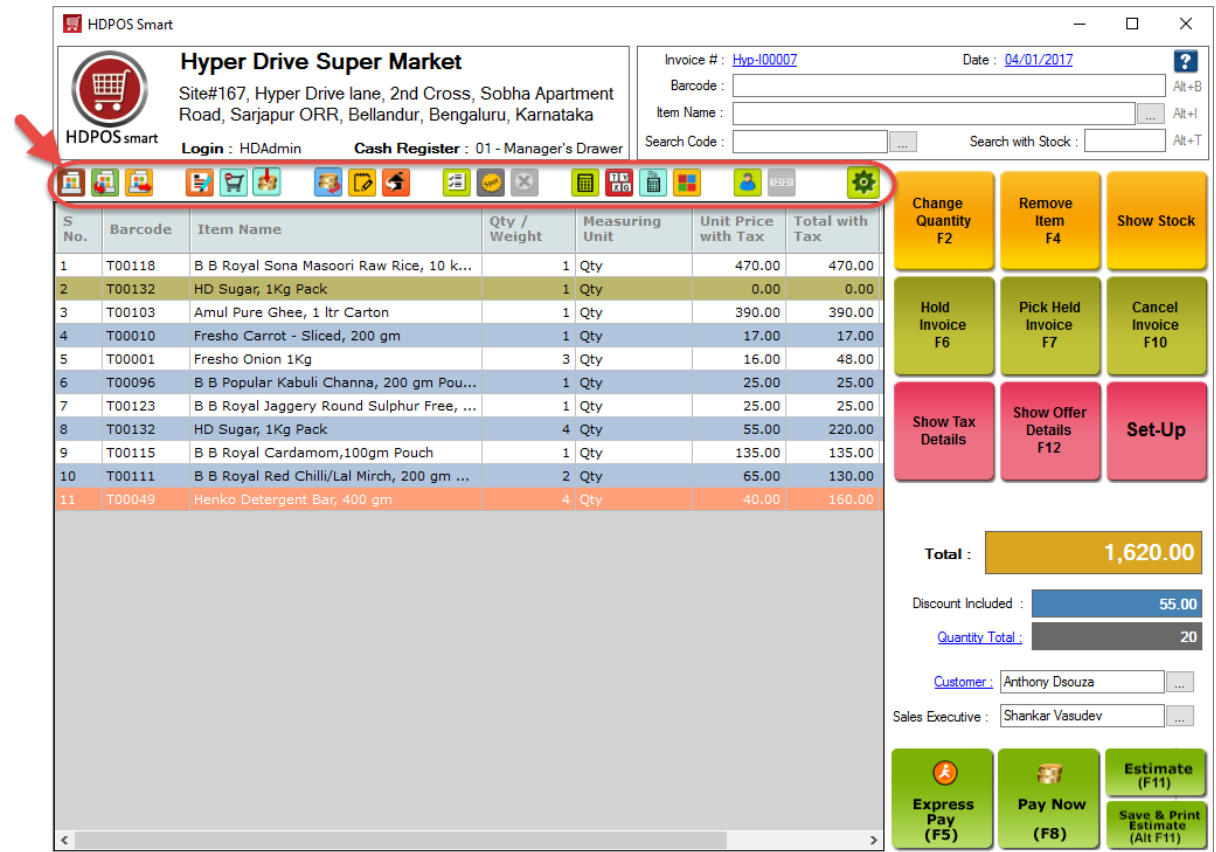
You can specify which of your employees can be selected as sales executives, thus keeping the restricting of the employees from being selected in this section. This can be done while defining/creating an employee in HDPOS.


Although the sales executive shown here is selected for the whole of the invoice, settings can be changed to allow for selection of different sales executives per item. The sales commission is calculated based on the commission percentage defined while creating an employee. The commission thus allowed to the employee will be credited to his/her account in HDPOS only upon successful payment against the invoice.



### viii. Toolbar Buttons

There are several buttons in the toolbar that allows you to perform different tasks, both on the invoice- such as allowing a discount, and on other documents, such as creating a cash transfer.



Some of the most commonly used buttons are made available in the toolbar by default. You can configure the toolbar, i.e., you can add or remove buttons from the toolbar by clicking on the 'manage'  toolbar button.

Some of the toolbar buttons and their functions are as follows:

- Current Cash Register Amount** – Select this option to know the available cash in the selected Cash register. You can also see the amount of Card, food coupons, and Cheque transactions.
- Cash Transfer** – This option allows you to quickly transfer cash from your current cash register to another cash register of the same business location.
- Change Cash Register** – Select this option when you want to change the currently selected cash register.
- Sales Invoice** – Clicking on this button will display all the Sales invoices created in the logged-in business location.



- e. **Receive Payments** – This allows you to create a 'receive payment' document where you receive payment from customers against pending invoices, or as advance amounts.
- f. **Add Spot Discount** – This functionality allows you to provide discounts either on specific items of the invoice, or on the invoice as a whole. You can provide discounts as flat amounts or allow a percentage discount.

### ix. Payment options

HDPOSsmart allows you to receive payments in numerous payment modes that includes, but not limited to cash, card, food coupons, cheques, etc.. In order to receive payments and save the ongoing invoice, you can use any one of the payment options – Express pay, or Pay Now.

**Hyper Drive Super Market**  
Site#167, Hyper Drive lane, 2nd Cross, Sobha Apartment Road, Sarjapur ORR, Bellandur, Bengaluru, Karnataka  
Login : HDAdmin Cash Register : 01 - Manager's Drawer

Invoice #: [Hyp-100007](#) Date : 04/01/2017

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	T00118	B B Royal Sona Masoori Raw Rice, 10 k...	1	Qty	470.00	470.00
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8	T00132	HD Sugar, 1Kg Pack	4	Qty	55.00	220.00
9	T00115	B B Royal Cardamom, 100gm Pouch	1	Qty	135.00	135.00
10	T00111	B B Royal Red Chilli/Lal Mirch, 200 gm ...	2	Qty	65.00	130.00
11	T00049	Henko Detergent Bar, 400 gm	4	Qty	40.00	160.00

There are no offers applied to the selected item.

Following offers are applied:  
Received 1 free "HD Sugar, 1Kg Pack".

**Total : 1,620.00**

Discount Included : 55.00  
Quantity Total : 20

Customer :  Anthony Dsouza  
Sales Executive :  Shankar Vasudev

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

- a. **Express pay (F5):** This button is used for quick billing. Clicking on this button will save the invoice with cash payment and print the invoice. This can be configured in settings to accept either cash or card as payment modes, and specify to either print the invoice or not after saving.
- b. **Pay Now (F8):** Clicking on this button will display the 'Pay Now' window where you can specify amounts collected against different modes of payments such as cash, card, etc. You can also create an 'estimate' or 'advance booking' document instead of an invoice.



## x. Offer Details Section

The offer details section of the main invoice screen is displayed at the bottom of the window. This section is divided into three parts, with the first part displaying the available offers, the second with the applied offers, and the third with items to be added to invoice, if any, in order to avail the applied offers.

**Hyper Drive Super Market**  
 Site#167, Hyper Drive lane, 2nd Cross, Sobha Apartment Road, Sarjapur ORR, Bellandur, Bengaluru, Karnataka  
 Login : HDAdmin Cash Register : 01 - Manager's Drawer

Invoice #: Hyp-100007 Date : 04/01/2017  
 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	T00118	B B Royal Sona Masoori Raw Rice, 10 k...	1	Qty	470.00	470.00
2	T00132	HD Sugar, 1Kg Pack	1	Qty	0.00	0.00
3	T00103	Amul Pure Ghee, 1 ltr Carton	1	Qty	390.00	390.00
4	T00010	Fresho Carrot - Sliced, 200 gm	1	Qty	17.00	17.00
5	T00001	Fresho Onion 1Kg	3	Qty	16.00	48.00
6	T00096	B B Popular Kabuli Channa, 200 gm Pou...	1	Qty	25.00	25.00
7	T00123	B B Royal Jaggery Round Sulphur Free, ...	1	Qty	25.00	25.00
8	T00132	HD Sugar, 1Kg Pack	4	Qty	55.00	220.00
9	T00115	B B Royal Cardamom, 100gm Pouch	1	Qty	135.00	135.00
10	T00111	B B Royal Red Chili/Lal Mirch, 200 gm ...	2	Qty	65.00	130.00
11	T00049	Henko Detergent Bar, 400 gm	4	Qty	40.00	160.00

**Change Quantity F2** **Remove Item F4** **Show Stock**

**Hold Invoice F6** **Pick Held Invoice F7** **Cancel Invoice F10**

**Show Tax Details** **Hide Offer Details F12** **Set-Up**

**Total : 1,620.00**

Discount Included : **55.00**

Quantity Total : **20**

Customer : Anthony Dsouza

Sales Executive : Shankar Vasudev

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

There are **1** offers applied to the selected item.

Following offers are applied:  
 Received 1 free "HD Sugar, 1Kg Pack".

Items applied to the selected item:

A small section above these three sections displays the offers applied on a selected item, if any. You can hide the offers section by clicking on the 'Hide Offer Details' button, or by pressing the **F12** button.