

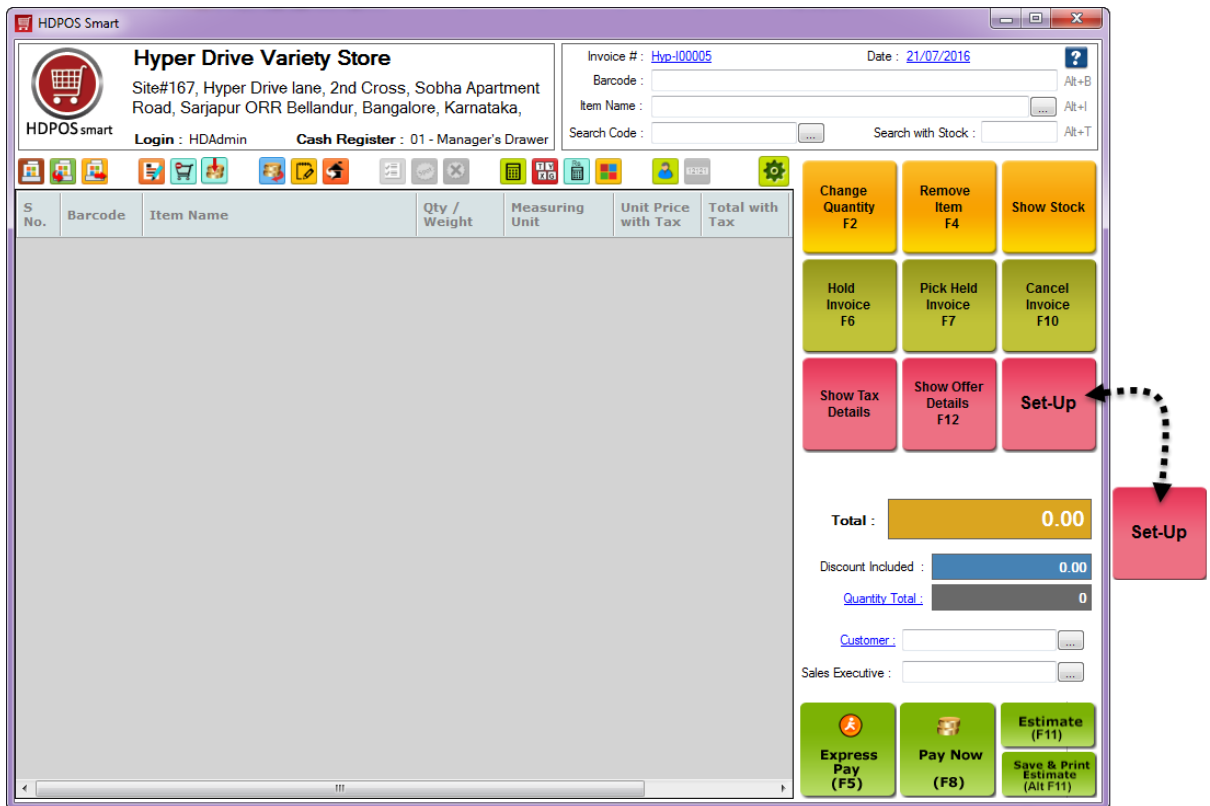
How to create a customer in HDPOS smart?



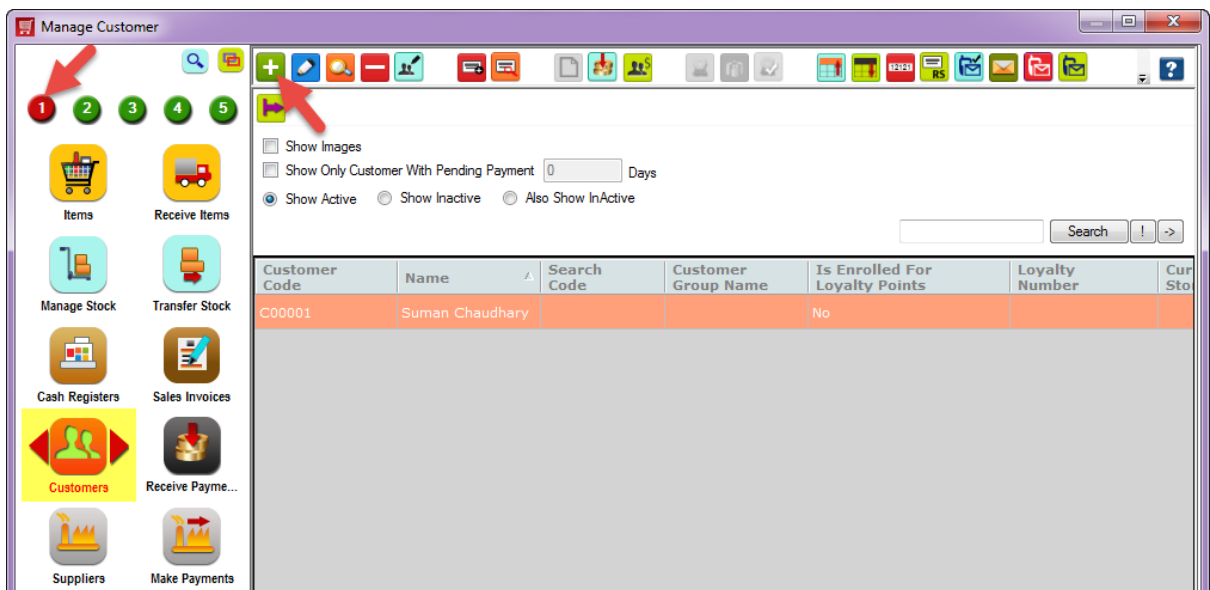
HDPOS smart Tutorials

To create a customer in HDPOS smart, you need to follow below steps:

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



2. Go to **1st Page**, click on **Customers** icon. From **Manage Customer** screen click on **Add Customer** button.





3. In **Add New Customer** screen, fill the required details of the customer.

- **Customer Code:** Enter the code manually for the customer by clicking on the Define My Own button, or let the application assign a code.
- **Customer Details:** Enter required details of customer.
- **Address:** Enter the Shipping Address and Billing Address of a customer.
- **Customer Image:** You can add image of a customer.
- **Business Location:** You can select the business location of a customer.
- **Created by:** You can select an employee who created a customer.
- **Customer Group:** You can select the group in which customer is belongs to.
- **Credit Limit/FA:** You need to uncheck the use system default credit limit and enter the required Credit Limit for a customer.
- **Financial Account:** Enter the opening balance you want to carry forward for a customer.
- **Customer Loyalty:** Check the checkbox if the customer is enrolled for loyalty points.

4. Click on **Save**.

Add New Customer

Customer Code : C00002 Define my own Code Add Photo Remove Photo

Customer Details

First Name : Ayushi

Last Name : Gupta

Search Code :

Birth Date : 16/05/1990

Anniversary Date :

Is Active

VAT No : V0001 CST No : C0001

TIN No : T0001 PAN No : P0001

Customer Loyalty

Is Enrolled For Loyalty Points

Loyalty Number :

Enrollment Date : ...

Loyalty Points : 0.00

Referred By :

Is Loyalty Points to Referrer on Every Invoice

Shipping Address **Billing Address**

Address Line 1 :

Address Line 2 : Komangala

City : Bangalore

State : Karnataka

Zip Code : 561023

Telephone Number : Mobile Number : 1100011200

E Mail : ayushi@abc.com

Credit Limit / FA

Use System Default Credit Limit

Credit Limit : 1,00,000.00

FA Balance : 0.00

Business Location : Hyper Drive Variety Store

Created By :

Customer Since Date :

Customer Group : Wholesaler

Financial Account : Opening Balance : 0.00 Cr

Customer Display Name : Ayushi Gupta

User Field List :

