

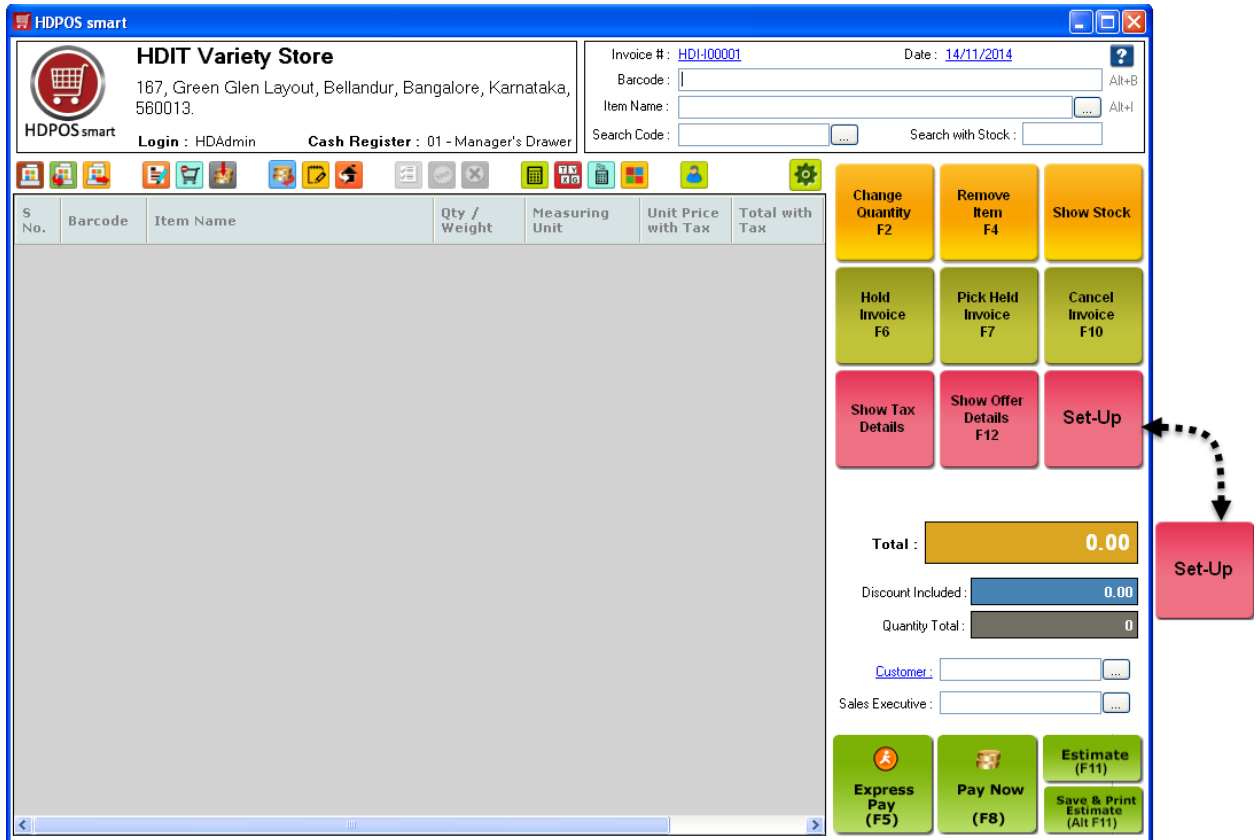
# How to create customer user fields?



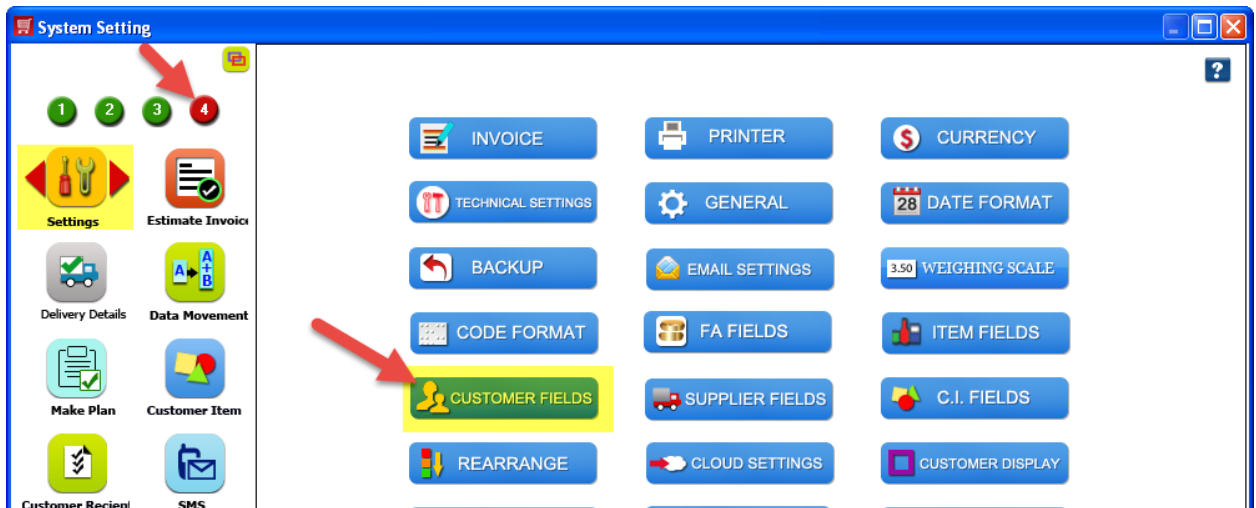
HDPOS smart Tutorials

With customer user fields you can define additional details for the customer. To create a customer user field, follow the steps below.

1. Run **HDPOS smart**. Click on **Set-Up**.

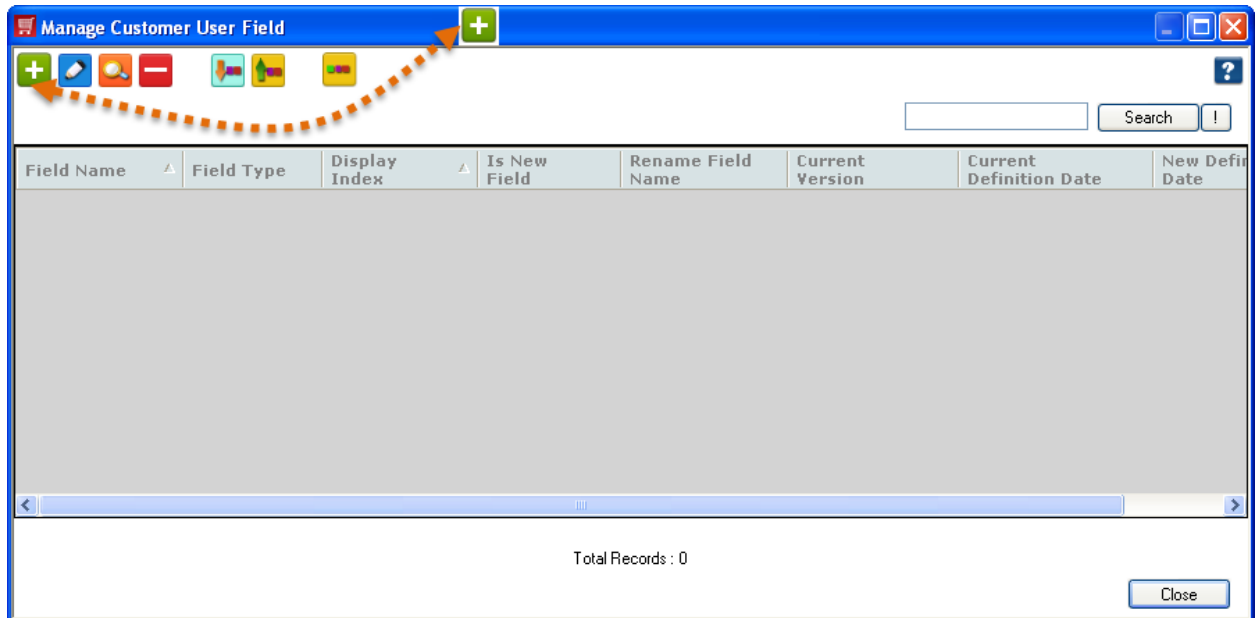


2. From 4<sup>st</sup> page of **Set-Up**, click on **Settings**.

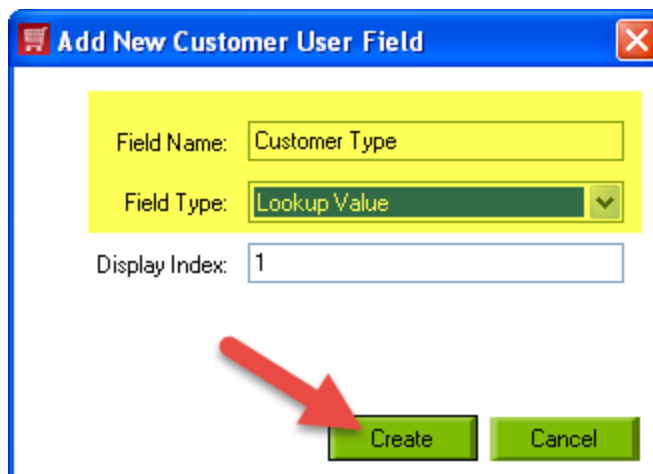




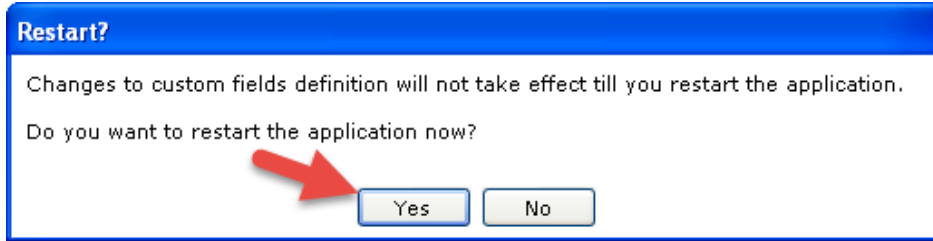
3. Click on **Customer Field** button to open **Manage Customer User Filed** screen. Click on **Add Customer User Field** button.



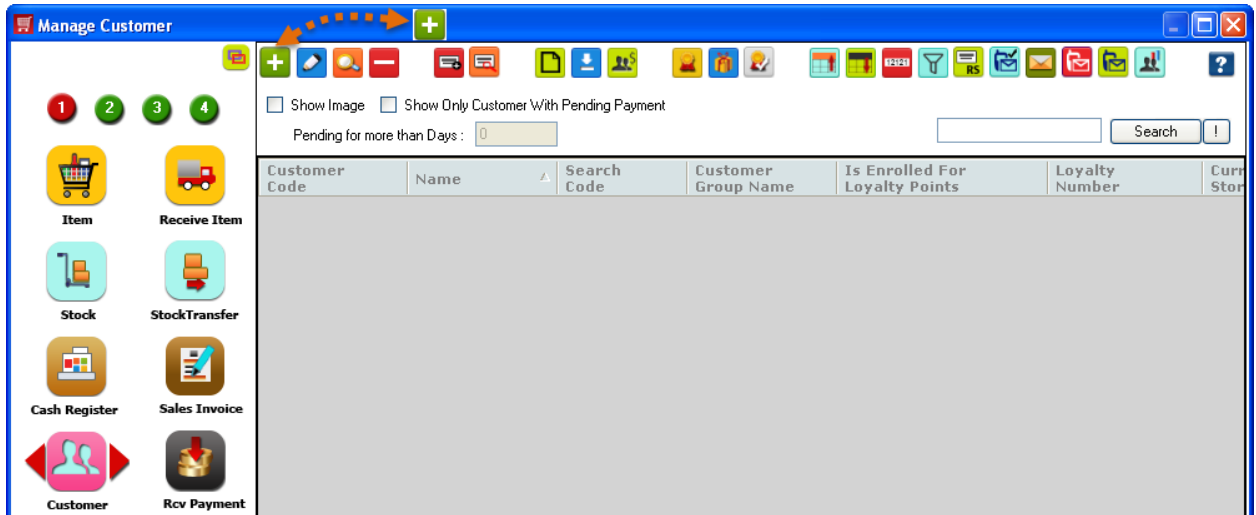
4. In the **Add New Customer User Field** screen that is opened, enter details for the following.
  - a. **Field Name:** Enter any name for user field.
  - b. **Field Type:** Select the type of user field depending on what type of data will be given to the user field.
  - c. **Display Index:** This is the position where the defined field will get displayed in the User Field List. (This is Auto-Incremental.)



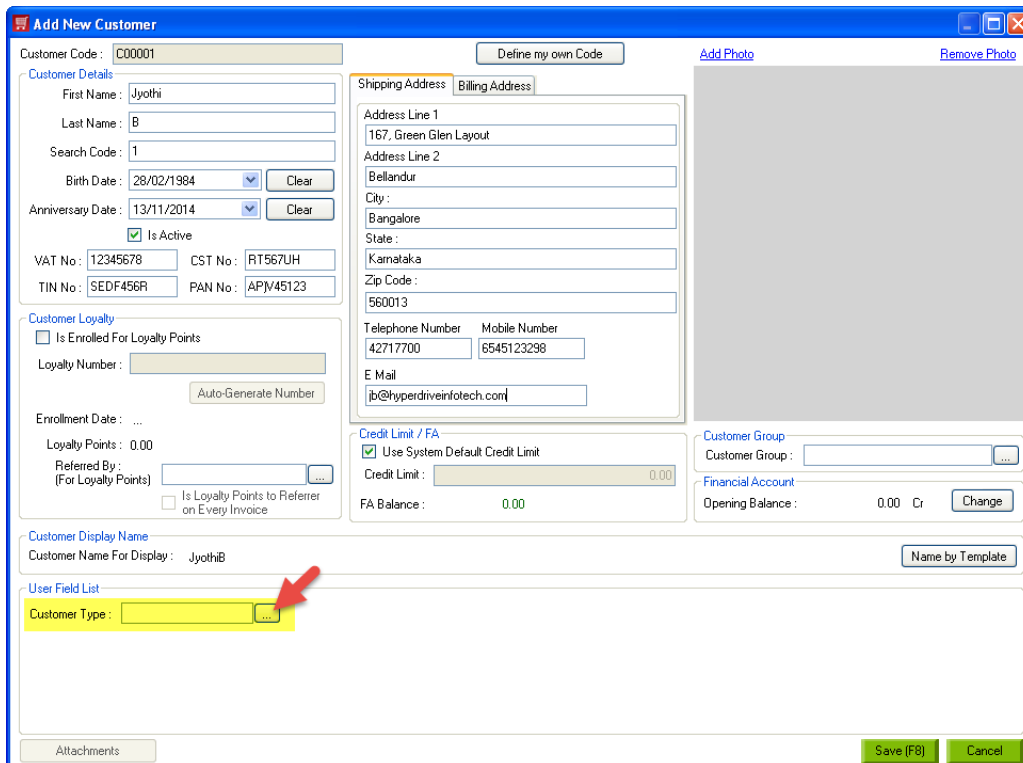
5. Click on **Create**.
6. You can repeat the Step4 and Step5 if you want to create more user fields for customer.
7. Click on **Close**. A message will be shown to you as below, to restart the application.
8. Click on **Yes**. The application will restart.




9. From main screen, click on **Set-Up**. Go to 1<sup>st</sup> page, click on **Customer**.
10. From **Manage Customer** screen, Click on **Add Customer** button.

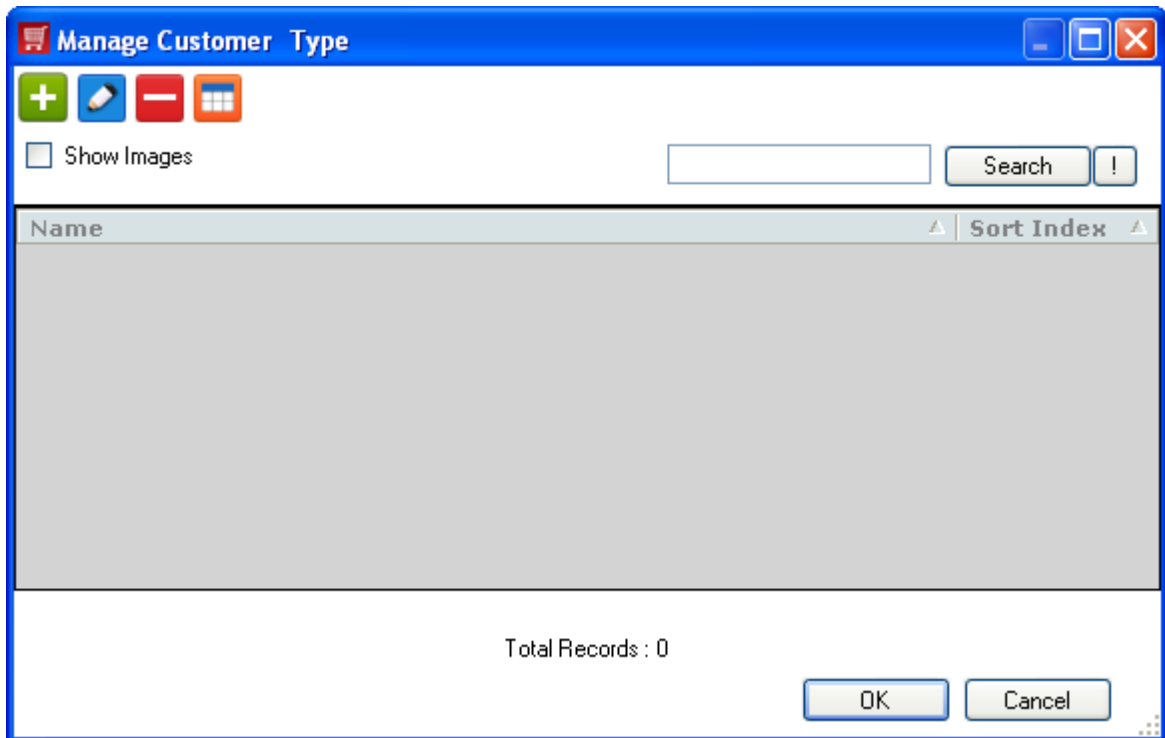


11. In the **Add New Customer** screen, enter the required details for customer. You can see the user field as shown below.

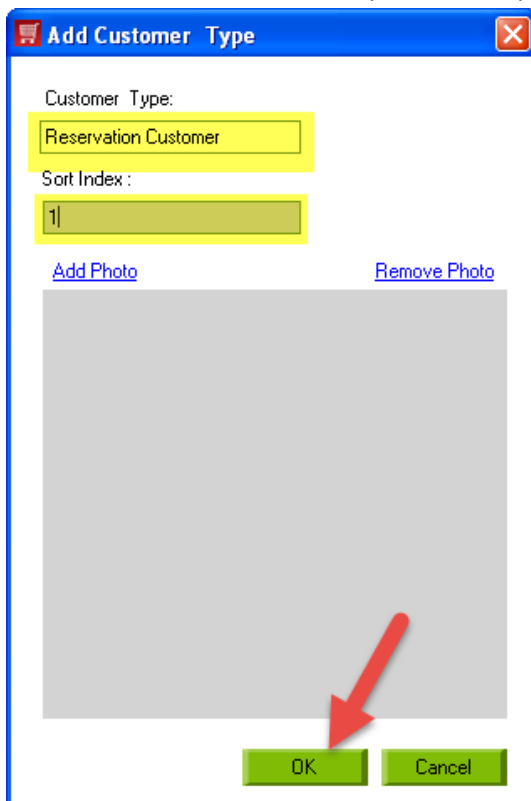




12. Click on  button beside that user field, and Manage Customer Type window will be opened.



13. Click on the **Add Customer Type** button. Enter the value for user field. You can enter a value for sort index also. Click on **OK**. Repeat this Step to create as many values of user fields as you want.





14. You can see all the defined values of user field as shown below.

Name	Sort Index
Credit Customer	0
Regular Customer	0
Reservation Customer	1

Total Records : 3

15. Click on OK after defining all values for user field.

16. Select any one the values for the defined customer and click on **Save**.

Customer Code : C00001

Customer Details:  
First Name : Jyothi  
Last Name : B  
Search Code : 1  
Birth Date : 28/02/1984  
Anniversary Date : 13/11/2014  
Is Active :   
VAT No : 12345678 CST No : RT567UH  
TIN No : SEDF456R PAN No : APN45123

Shipping Address:  
Address Line 1 : 167, Green Glen Layout  
Address Line 2 : Bellandur  
City : Bangalore  
State : Karnataka  
Zip Code : 560013  
Telephone Number : 42717700 Mobile Number : 6545123298  
E Mail : jb@hyperdriveinfotech.com

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 :

Credit Limit / FA:  
Use System Default Credit Limit :   
Credit Limit : 0.00  
FA Balance : 0.00

Customer Display Name:  
Customer Name For Display : JyothiB

User Field List:  
Customer Type : Reservation Customer

Attachments

Save (F8) Cancel