

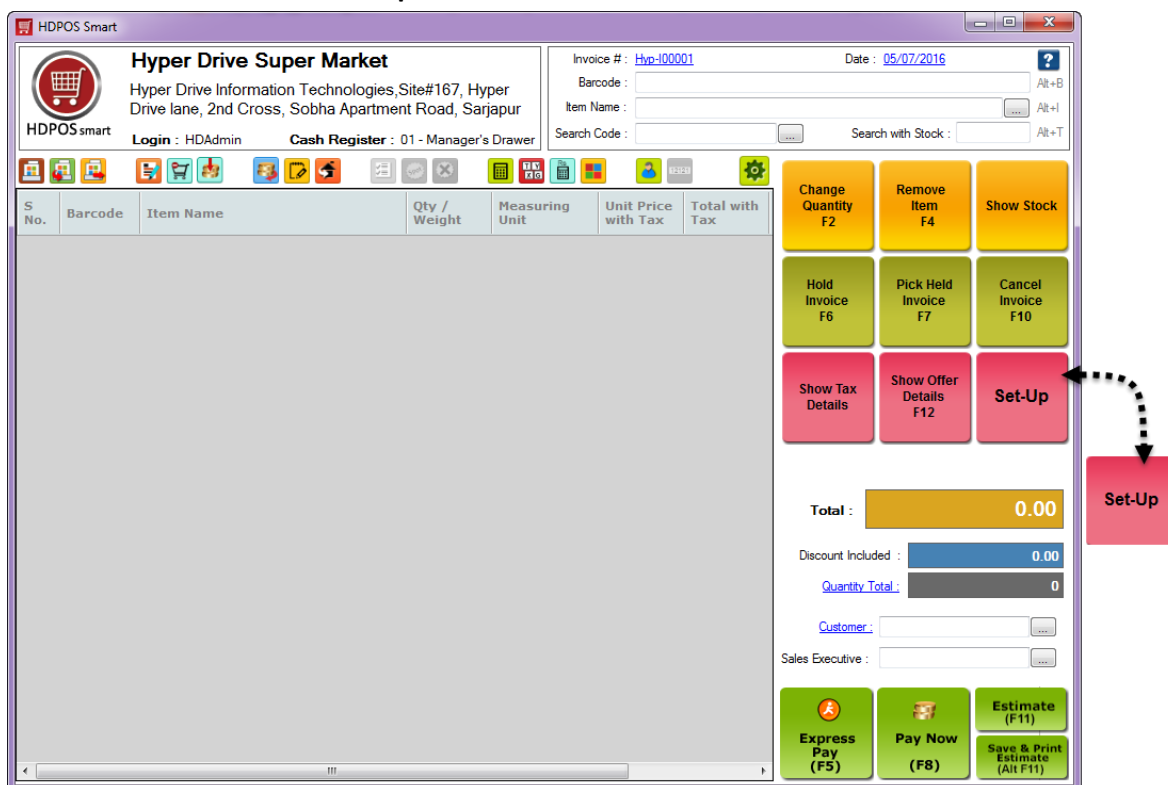
How to define collections for customers?



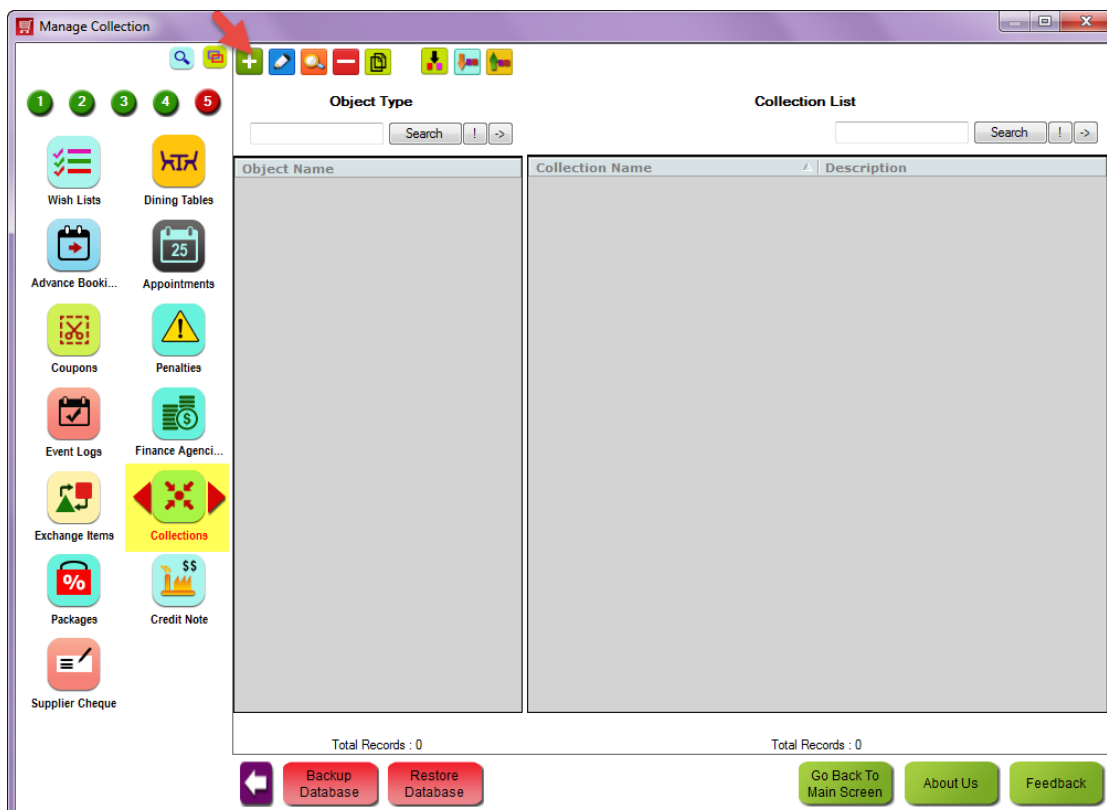
HDPOS smart Tutorials

To define collections for customers, you need to follow below steps:

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



2. Go to 5th Page, click on **Collections**. From **Manage Collections** screen, click on **Add Collection** button.





3. In the **Add Collection Detail** enter the required details and click on 'Object'

- **Object Name:** Select the object name as **customer**
- **Collection Name:** Enter a name for **Collection**.
- **Description:** Enter description about the collection if needed.
- From **Select Object and Descriptions** section, click on **Object** button.

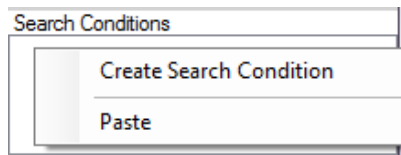
The screenshot shows a dialog box titled "Add Collection Detail". It has several input fields: "Object Name" (a dropdown menu with "Customer" selected), "Collection Name" (a text box with "Bangalore City Customer Collection"), and "Description" (a text area with "This collection belongs to the Bangalore City Customer."). Below these is a section titled "Select Object and Descriptions" containing a button labeled "Object". A red arrow points to this button. At the bottom right are "Create" and "Cancel" buttons.

4. You will see the **Field List** screen as shown below.

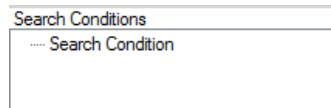
The screenshot shows a "Field List" dialog box. On the left is a scrollable list of system objects, including "AbsentHistory", "AccessRequest", "AccessRight", "AccountGroup", "ActiveLogin", "AdditionalImage", "AdditionalReceipts", "Address", "AlternateBarcode", "AMC", "AMCHistory", "AppliedItem", "Appointment", "AppointmentItem", "AppointmentUserFieldData", "AppointmentUserFieldDefinition", "Attachment", "BankAccount", "BankBranch", "Barcode", "BOMItem", "BOMItemBatch", "BusinessLocation", "Captcha", "CashRegister", "CashRegisterTrace", "CashRegisterTransaction", "Category", "CategoryOfferAmt", "CategoryOfferAmtQPQ", "CategoryPendingDiscount", "ChangePriceDocument", "ChangePriceItem", "Channel", "Cheque", "ChequeHistory", "ChequeInvoice", "CINote", and "CIStockTransaction". The main area is divided into sections: "Primary Object" (with "Customer" selected), "Secondary Objects", and "Dynamic Objects". On the right side, there are sections for "Select Columns" (with "Customer Id" selected), "Search Conditions", "Secondary Join", "GroupBy Clause", and "Having Clause". "OK" and "Cancel" buttons are at the bottom right.



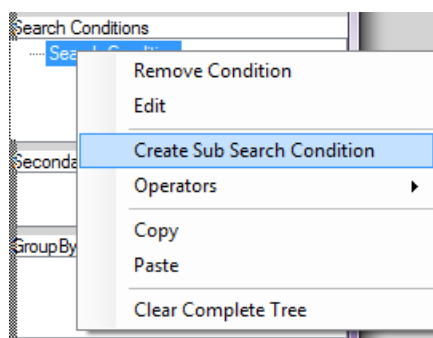
- 5. Under **Search Condition** section, right click on the mouse and you will see two options as shown below.



- Click on **Create Search Condition**. A Search Condition text will be added here as shown below.

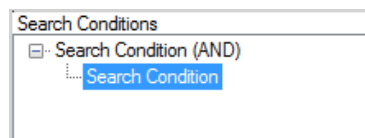


- Right click on Search Condition and you will see as following.

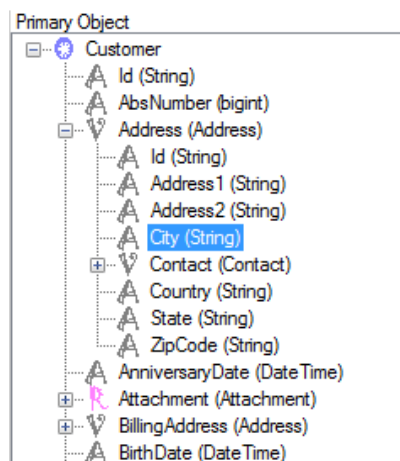


Select **Create Sub Search Condition**.



- You will see the screen as shown below. Select the below search condition.

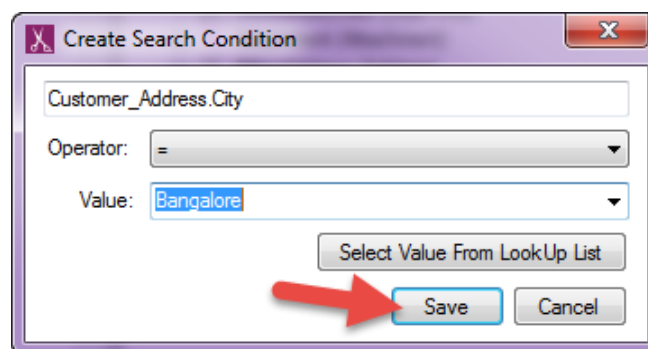


- 6. In **Primary Object** section :

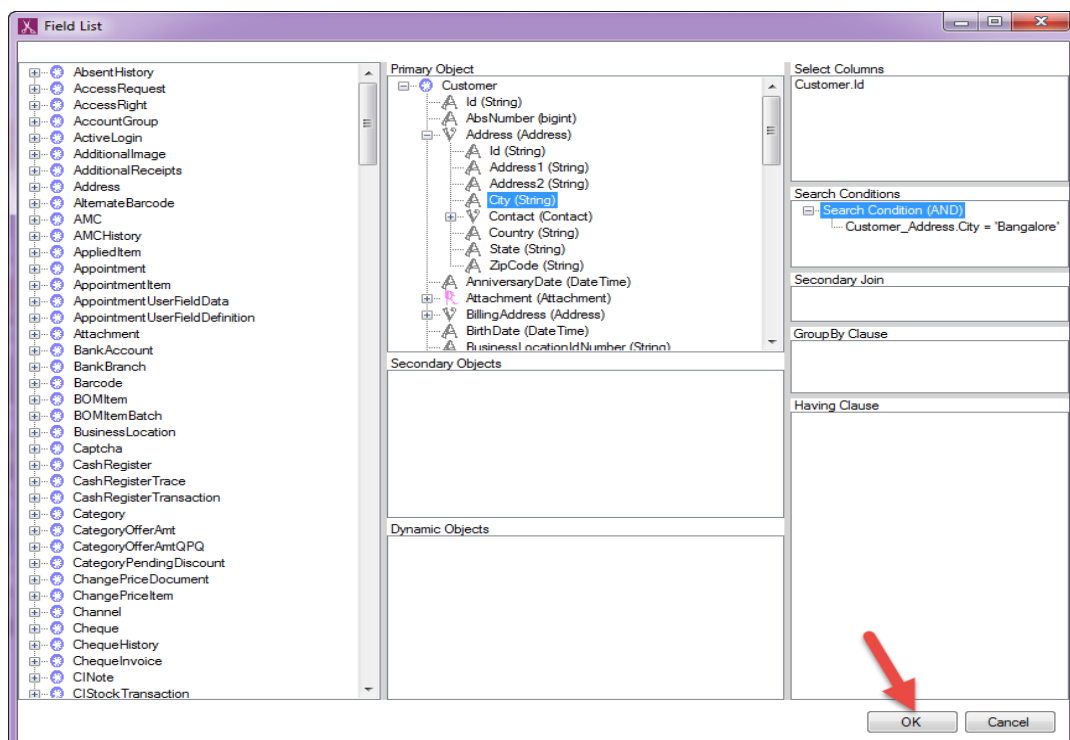




- Click on the plus [+] button beside Customer and you will see all fields defined under it.
- Select Value  and expand it by clicking on the plus [+] button beside the value you have selected. In this example I have selected value as **Address**.
- You will see all available attributes  under **Address**, select the required attribute drag and drop it on this search condition. In this example I have selected **City** as attribute.
- From **Create Search Condition** window select the operator as required and enter the value. In this example I have chosen operator as = and value as **Bangalore**.



7. Click on **Save**.
8. Click on **OK** in field list window to save the changes.





9. Click on **Create** button in **Add Collection Detail**.

Object Name : Customer

Collection Name : Bangalore City Customer Collection

Description : This collection belongs to the Bangalore City Customer.

Select Object and Descriptions

Object

Create Cancel

10. You can see the collection that got created as shown below.

Manage Collection

Object Type: Customer

Collection List

Object Name	Collection Name	Description
Customer	Bangalore City Customer Collection	This collection belongs to the Bangalore City Customer.