

How to do bulk edit of customers' details?



HDPOS smart Tutorials

For editing multiple customers' details such as the values in user fields, customers' credit limit, and customer groups- HDPOS smart provides Customer Bulk Edit functionality.

The steps for performing bulk editing are as given below:

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

The screenshot displays the HDPOS Smart application window. The top header includes the company logo, name 'HD Stores', address '167, Green Glen Layout, Bellandur, Bangalore, Karnataka, 560013', login 'HDAdmin', and cash register '01 - Manager's Drawer'. The main area features a table with columns for S No., Barcode, Item Name, Qty / Weight, Measuring Unit, Unit Price with Tax, and Total with Tax. To the right of the table is a grid of function buttons: Change Quantity (F2), Remove Item (F4), Show Stock, Hold Invoice (F6), Pick Held Invoice (F7), Cancel Invoice (F10), Show Tax Details, Show Offer Details (F12), and Set-Up. Below these buttons are fields for Total (0.00), Discount Included (0.00), Quantity Total (0), Customer, and Sales Executive. At the bottom right, there are buttons for Express Pay (F5), Pay Now (F8), Estimate (F11), and Save & Print Estimate (Alt F11). A red dashed arrow points from the 'Set-Up' button in the grid to a larger, separate 'Set-Up' button on the right side of the interface.



3. From the first page of setup, click on **Customer**.

Set-Up

1 2 3 4 5

Item Receive Item

Stock Stock Transfer

Cash Register Sales Invoice

Customer Rcv Payment

Supplier Pay Supplier

Shop(BL) Sales Return

Employee Access Rights

Reports Stickers

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Customer

Welcome to Set-Up

Please make your selection from the left side

4. Select a customer and click on **View Customer** toolbar button.

Manage Customer

1 2 3 4 5

Item Receive Item

Stock Stock Transfer

Cash Register Sales Invoice

Customer Rcv Payment

Supplier Pay Supplier

Shop(BL) Sales Return

Employee Access Rights

Reports Stickers

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Show Images Show Only Customer With Pending Payment

Show Active Show Inactive Show All Pending for more than Days : 0 Search ! >

Name	Search Code	Customer Group Name	Is Enrolled For Loyalty Points	Loyalty Number	Current Store Credit	Mobil Num
Aditi Gupta		Retail	Yes	LY00002	0.00	
Aishwarya Shetty		Retail	Yes	LY00023	0.00	
Alisha		Retail	Yes	LY00011	0.00	
Amit		Retail	Yes	LY00014	0.00	
Anamika Roy	AR	Retail	Yes	LY00001	0.00	
Anshul Dubey		Retail	No		0.00	
Anup S		Retail	Yes	LY00025	0.00	
Anusha		Retail	Yes	LY00027	0.00	
Ashrith		Retail	Yes	LY00019	0.00	
Christopher George		Wholesale	No		0.00	
Deepthi Rao		Retail	Yes	LY00009	0.00	
Divya		Retail	Yes	LY00010	0.00	
Eesha fernandes		Retail	Yes	LY00017	0.00	
Ganesh Swamy	GS	Retail	Yes	LY00007	0.00	
Irfan Khan		Retail	Yes	LY00022	0.00	
Jennifer		Retail	Yes	LY00026	0.00	
Joseph		Retail	Yes	LY00004	0.00	
Kiran Kumar		Retail	Yes	LY00003	0.00	
Manoj		Wholesale	No		0.00	
Natasha Romanoff	NR	Retail	Yes	LY00021	0.00	
Nishanth Gowda		Wholesale	No		0.00	
Radhika		Retail	Yes	LY00016	0.00	
Rihanna Fenty	RF	Retail	Yes	LY00020	0.00	

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Showing 23 Records



5. Observe the **Credit Limit, Customer Group, and User Field** values.

View Customer

Customer Code : C00001

Customer Details

First Name : Anamika
 Last Name : Roy
 Search Code : AR
 Birth Date : 21/01/1990
 Anniversary Date : 10/03/2015
 Is Active
 VAT No : CST No :
 TIN No : PAN No :

Shipping Address **Billing Address**

Address Line 1 : #167, 3rd Cross
 Address Line 2 : Bellanduru
 City : Bengaluru
 State : Karnataka
 Zip Code : 560103
 Telephone Number : 080-42717700 Mobile Number : 966117788223665 [Send SMS](#)
 E Mail : anamikaroy@hyperdriveinfotech.com [Send Email](#)

Customer Loyalty

Is Enrolled For Loyalty Points
 Loyalty Number : LY00001
 Enrollment Date : 22/01/2016
 Loyalty Points : 0.00
 Referred By : (For Loyalty Points)
 Is Loyalty Points to Referrer on Every Invoice

Credit Limit / FA

Use System Default Credit Limit
Credit Limit : 0.00
 FA Balance : 0.00 [Current Balance Details](#)

Customer Group
 Customer Group :
 Financial Account
 Opening Balance : 0.00 Db [Change](#)

Customer Display Name
 Customer Name For Display : Anamika Roy [Name by Template](#)

User Field List

Eligible For Home Delivery :

[Attachments](#) [Update & Next \(F7\)](#) [< Previous](#) [Next >](#) [Save \(F8\)](#) [Close](#)

6. Click on **Close**.

7. You can select multiple customers here by pressing **Ctrl + Mouse left click** or by searching with a condition. Click on **Bulk Edit**.

Manage Customer

[Bulk Edit](#)

Show Images Show Only Customer With Pending Payment
 Show Active Show Inactive Show All Pending for more than Days : 0 [Search](#) [!](#) [>](#)

Name	Search Code	Customer Group Name	Is Enrolled For Loyalty Points	Loyalty Number	Current Store Credit	Mobil Num
Aditi Gupta		Retail	Yes	LY00002	0.00	
Aishwarya Shetty		Retail	Yes	LY00023	0.00	
Alisha		Retail	Yes	LY00011	0.00	
Amit		Retail	Yes	LY00014	0.00	
Anamika Roy	AR	Retail	Yes	LY00001	0.00	
Anshul Dubey		Retail	No		0.00	
Anup S		Retail	Yes	LY00025	0.00	
Anusha		Retail	Yes	LY00027	0.00	
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Natasha Romanoff	NR	Retail	Yes	LY00021	0.00	
Nishanth Gowda		Wholesale	No		0.00	
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8. Enter the details to be changed in the **Customer Bulk Edit** window.

Customer Bulk Edit

Apply Customer Group
Customer Group : Retail

Apply Credit Limit
 Use System Default Credit Limit
Credit Limit : 50,000.00 Change

User Fields
 Eligible For Home Delivery : Yes

Apply To Selected Apply To All Matching Condition Cancel

- i. **Apply Customer Group:** Checking this checkbox will apply the value selected in Customer group section.
 - **Customer group:** Select the customer group value to be applied. The value selected is not saved unless 'Apply Customer Group' checkbox is checked before applying.
 - ii. **Apply Credit Limit:** Checking this checkbox will save the changes done to credit limit
 - **Use system default credit limit:** Applies default credit limit to the customer. Changes are saved only if the 'Apply credit Limit' checkbox is checked.
 - **Credit Limit:** If default credit limit is not being used, then, a credit limit can be provided here. . Changes are saved only if the 'Apply credit Limit' checkbox is checked.
 - iii. **User fields section:** You can provide desired values for all the user fields here. Checking the checkbox on the right of the user field name will apply the changed value.
9. Apply changes by clicking on **Apply to Selected** or **Apply to All Matching Condition**.
- i. **Apply To Selected:** Changes are saved only for the selected customers.
 - ii. **Apply to all Matching Condition:** Changes are applied to all the customers displayed in the grid.



10. Verify that the changes have been applied to customers by opening the customer in **View** mode

View Customer

Customer Code : C00001

Customer Details

First Name : Anamika
Last Name : Roy
Search Code : AR
Birth Date : 21/01/1990
Anniversary Date : 10/03/2015
 Is Active
VAT No : CST No :
TIN No : PAN No :

Shipping Address **Billing Address**

Address Line 1 : #167, 3rd Cross
Address Line 2 : Bellanduru
City : Bengaluru
State : Karnataka
Zip Code : 560103
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Credit Limit / FA

Use System Default Credit Limit
Credit Limit : 50,000.00
FA Balance : 0.00

Customer Group

Customer Group : Retail
Financial Account :
Opening Balance : 0.00 Db

Customer Display Name

Customer Name For Display : Anamika Roy

User Field List

Eligible For Home Delivery : Yes

Attachments Update & Next (F7) < Previous Next > Save (F8) Close