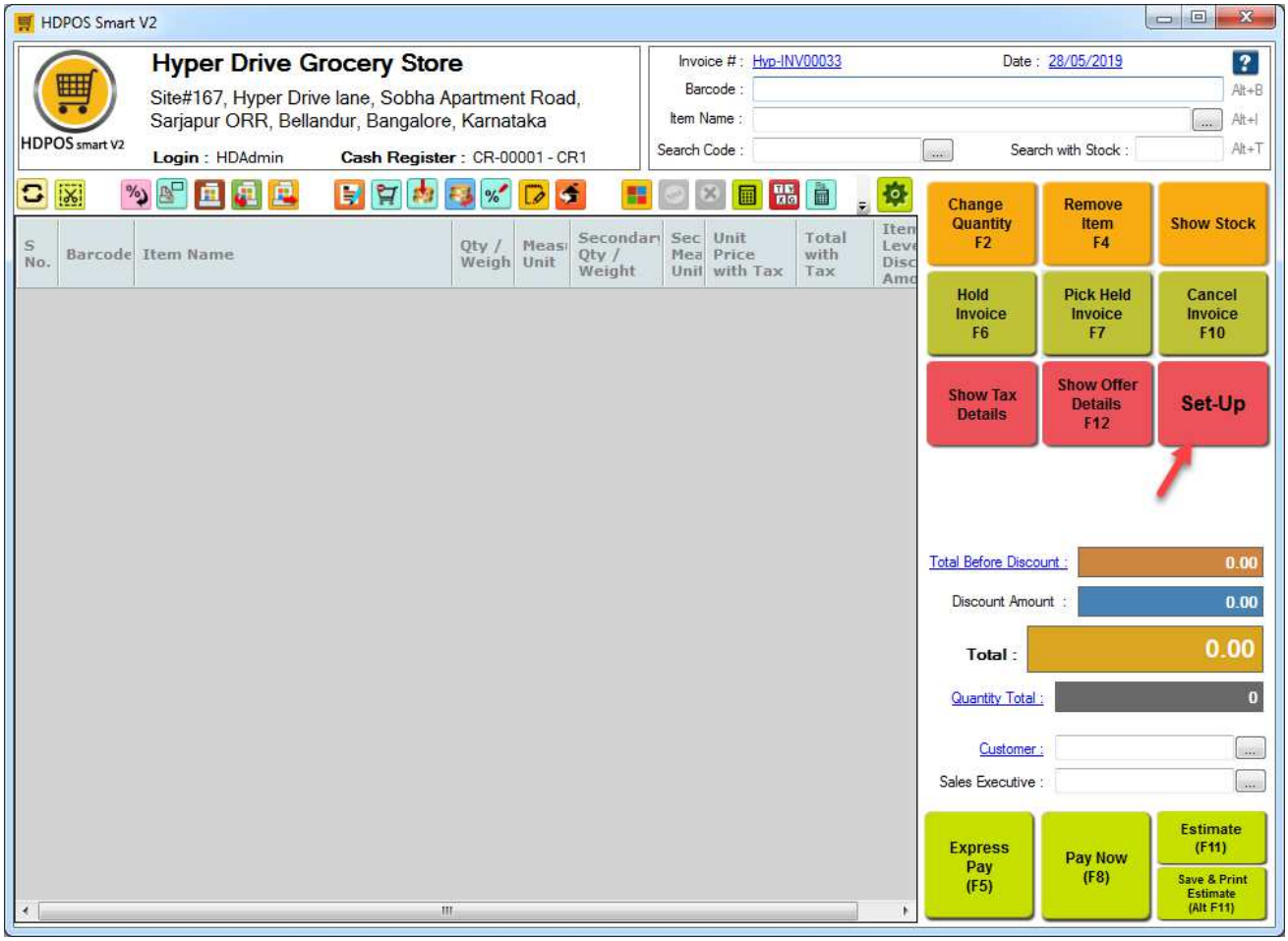
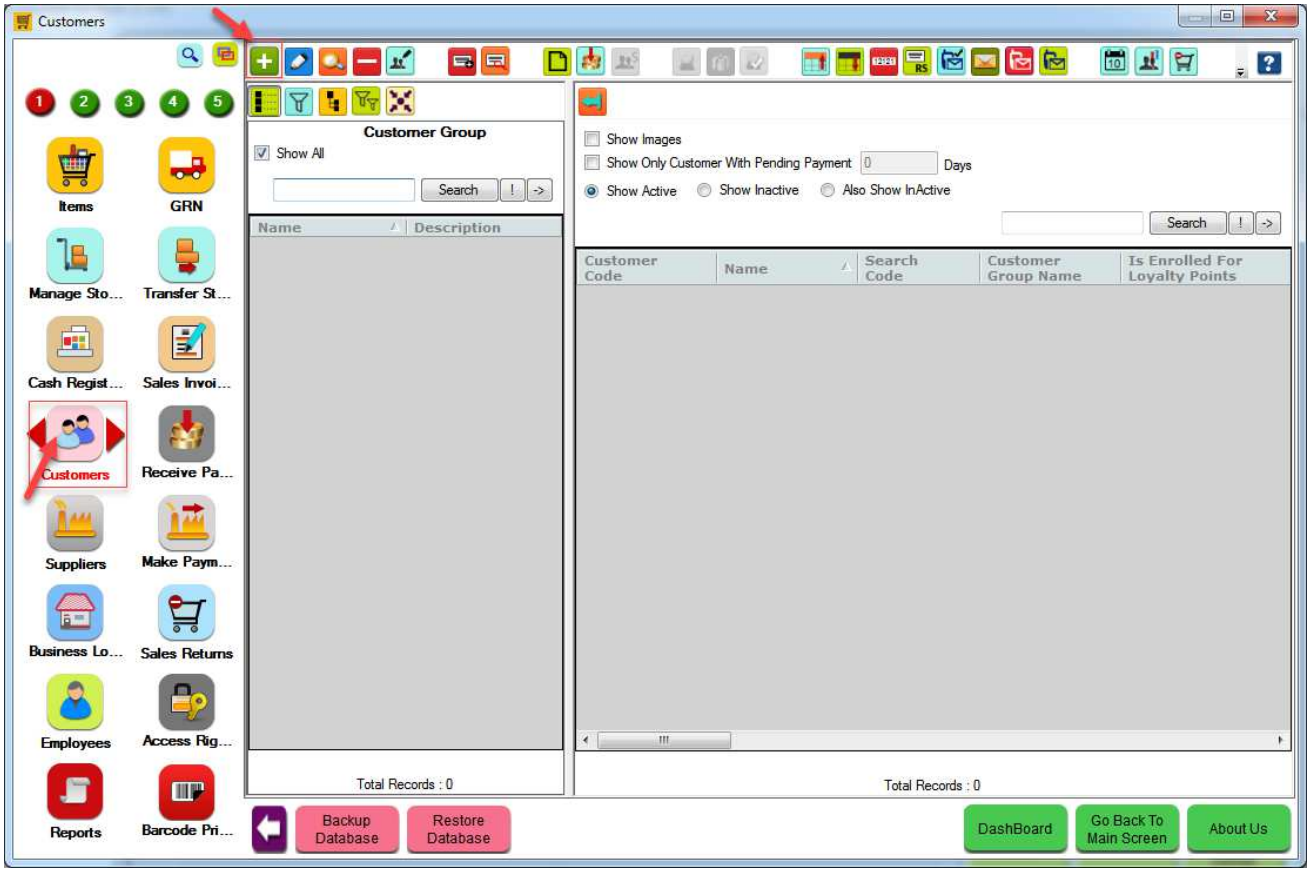
How to create a customer in HDPOS smart?

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**.



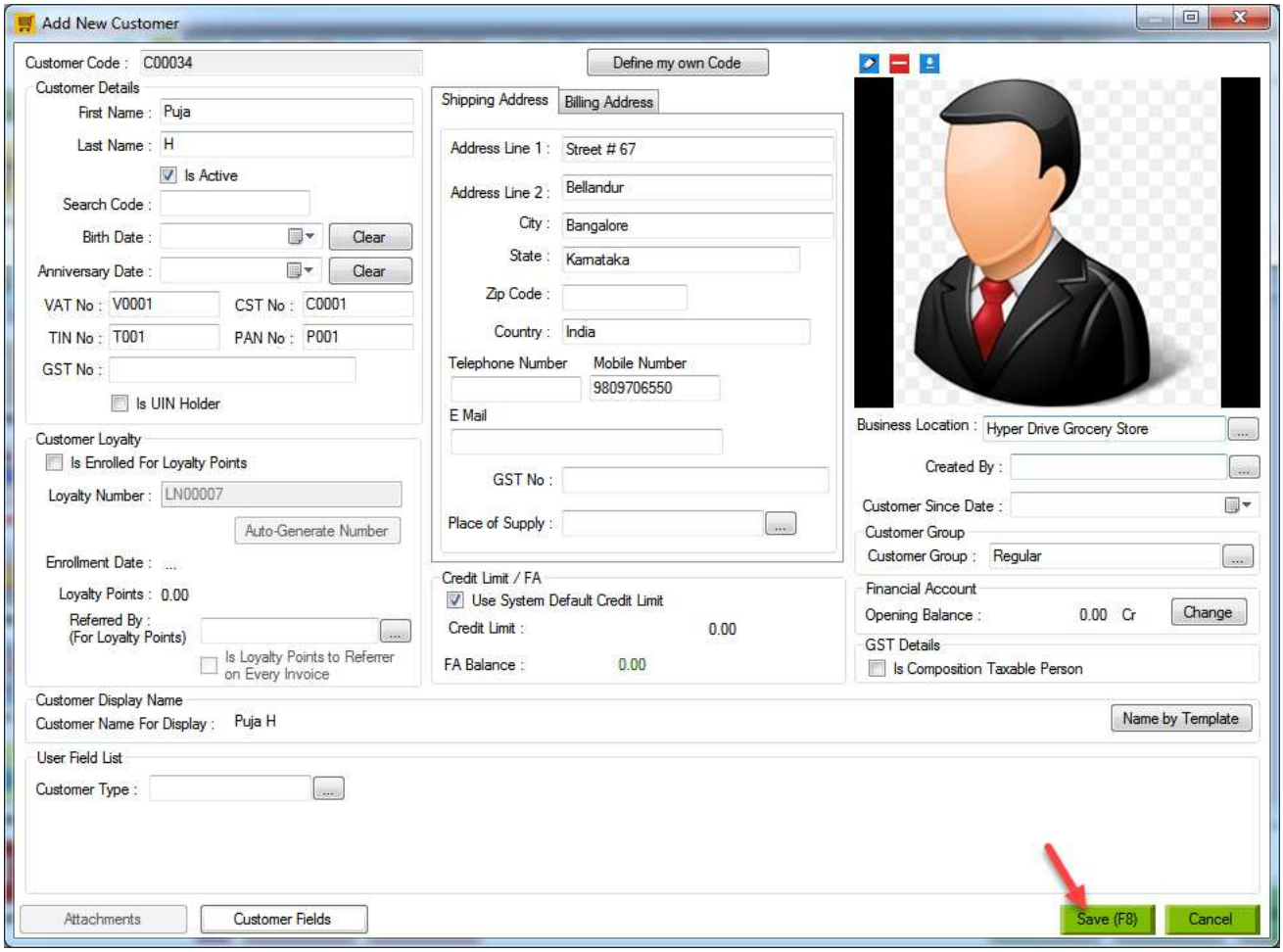
2. Go to **1st Page**, click on **Customers** icon. From **Manage Customer** screen click on **Add Customer** button.



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 : C00034
Define my own Code
Customer Details
First Name : Puja
Last Name : H
Is Active
Search Code :
Birth Date : Clear
Anniversary Date : Clear
VAT No : V0001
CST No : C0001
TIN No : T001
PAN No : P001
GST No :
Is UIN Holder
Shipping Address
Billing Address
Address Line 1 : Street # 67
Address Line 2 : Bellandur
City : Bangalore
State : Kamataka
Zip Code :
Country : India
Telephone Number
Mobile Number
9809706550
E Mail
GST No :
Place of Supply :
Business Location : Hyper Drive Grocery Store
Created By :
Customer Since Date :
Customer Group
Customer Group : Regular
Financial Account
Opening Balance : 0.00 Cr
Change
GST Details
Is Composition Taxable Person
Customer Loyalty
Is Enrolled For Loyalty Points
Loyalty Number : LN00007
Auto-Generate Number
Enrollment Date : ...
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
Customer Display Name
Customer Name For Display : Puja H
Name by Template
User Field List
Customer Type :
Attachments
Customer Fields
Save (F8)
Cancel