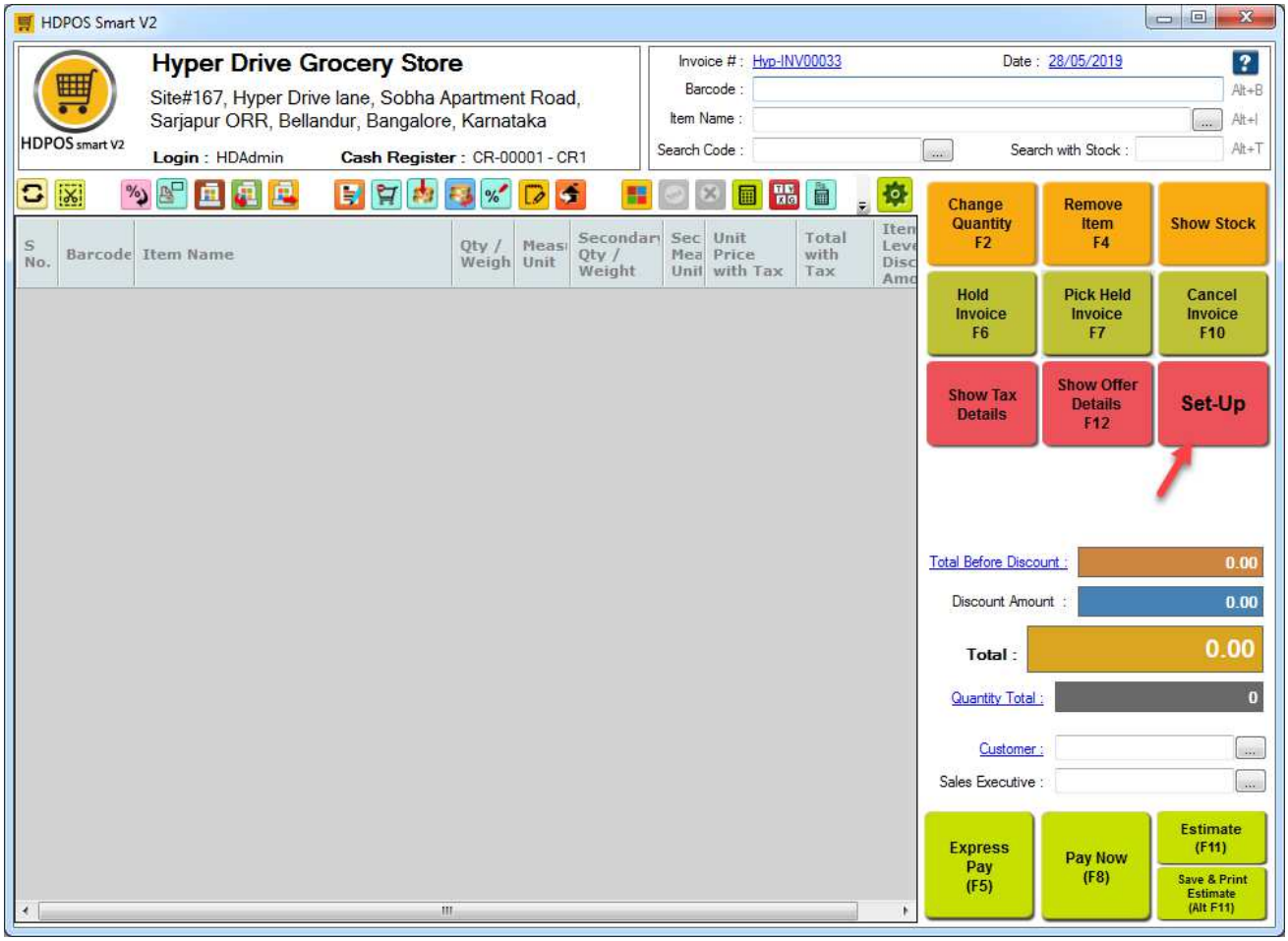
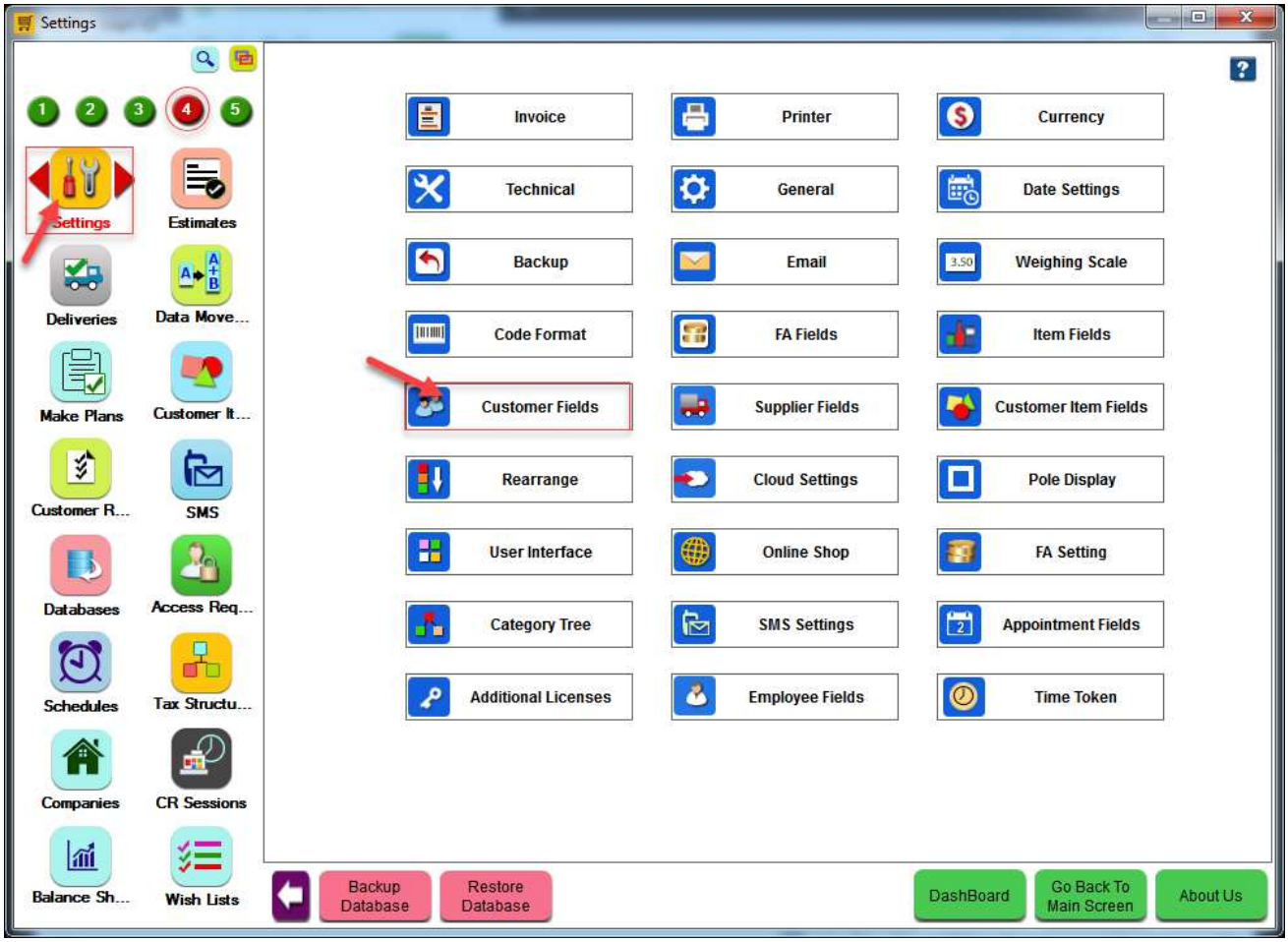
How to create customer user fields?

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

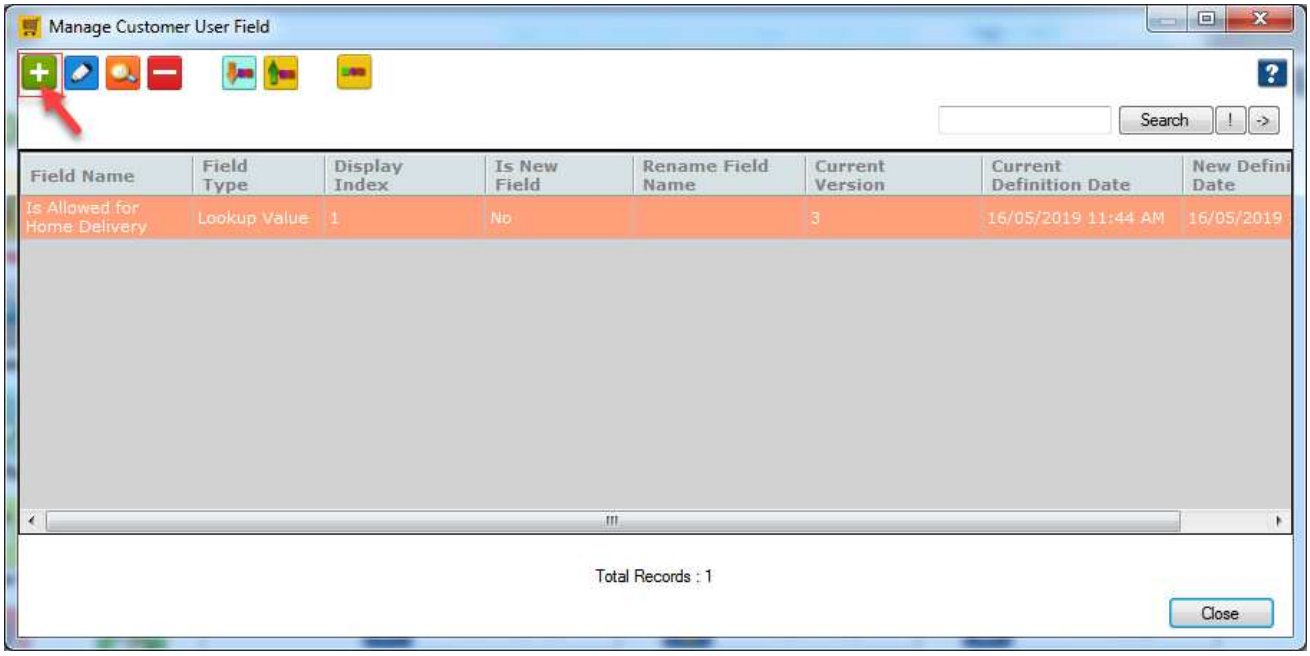
1. Run **HDPOS smart**. Click on **Set-Up**.



2. From **4th 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 opens, enter details for the following.

a. **Field Name**: Enter required 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.

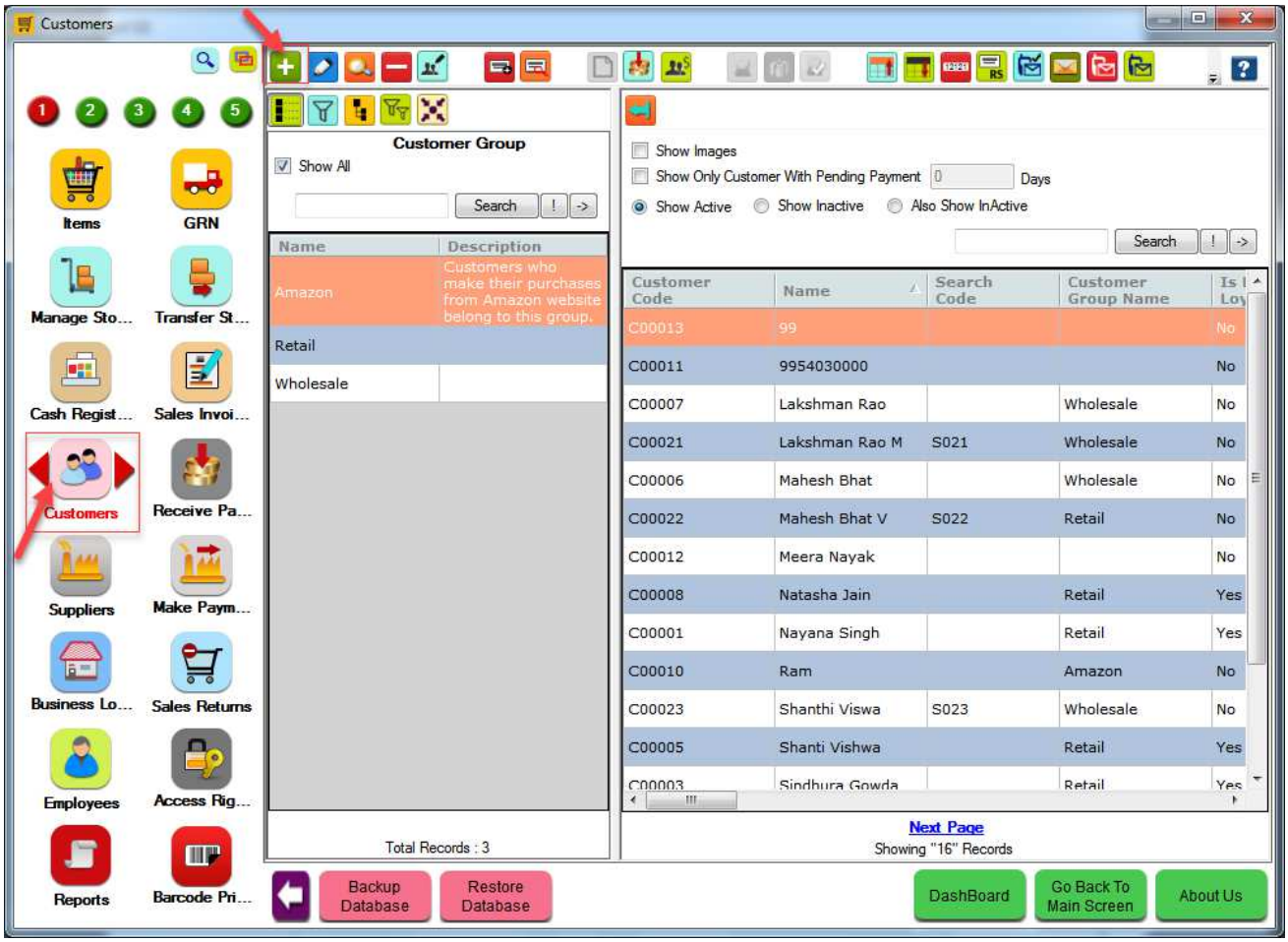


6. You can repeat the Step 4 and Step 5 if you want to create more user fields for customer.

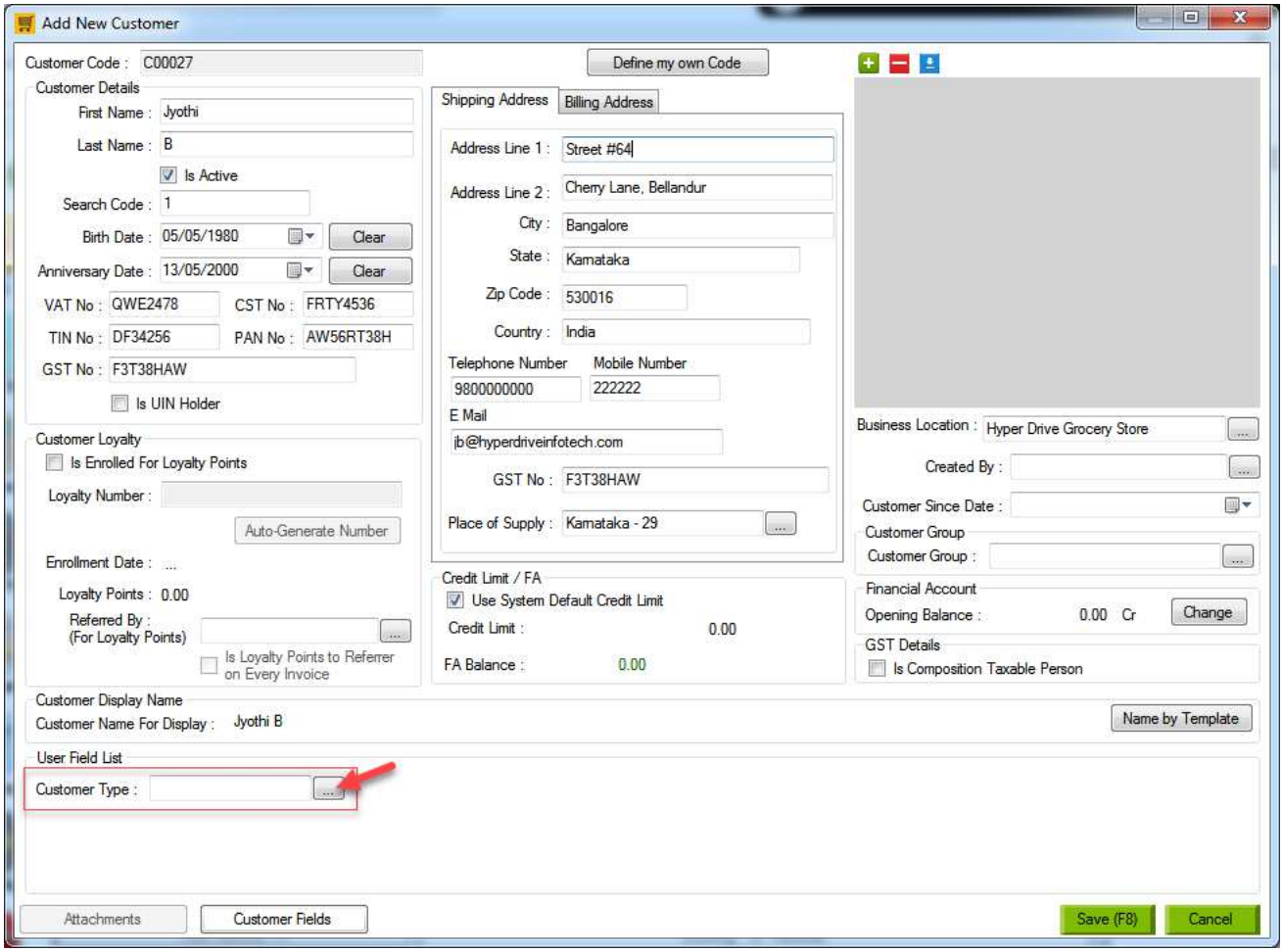
7. Click on **Close**.

8. From main screen, click on **Set-Up**. Go to 1st page, click on **Customer**.

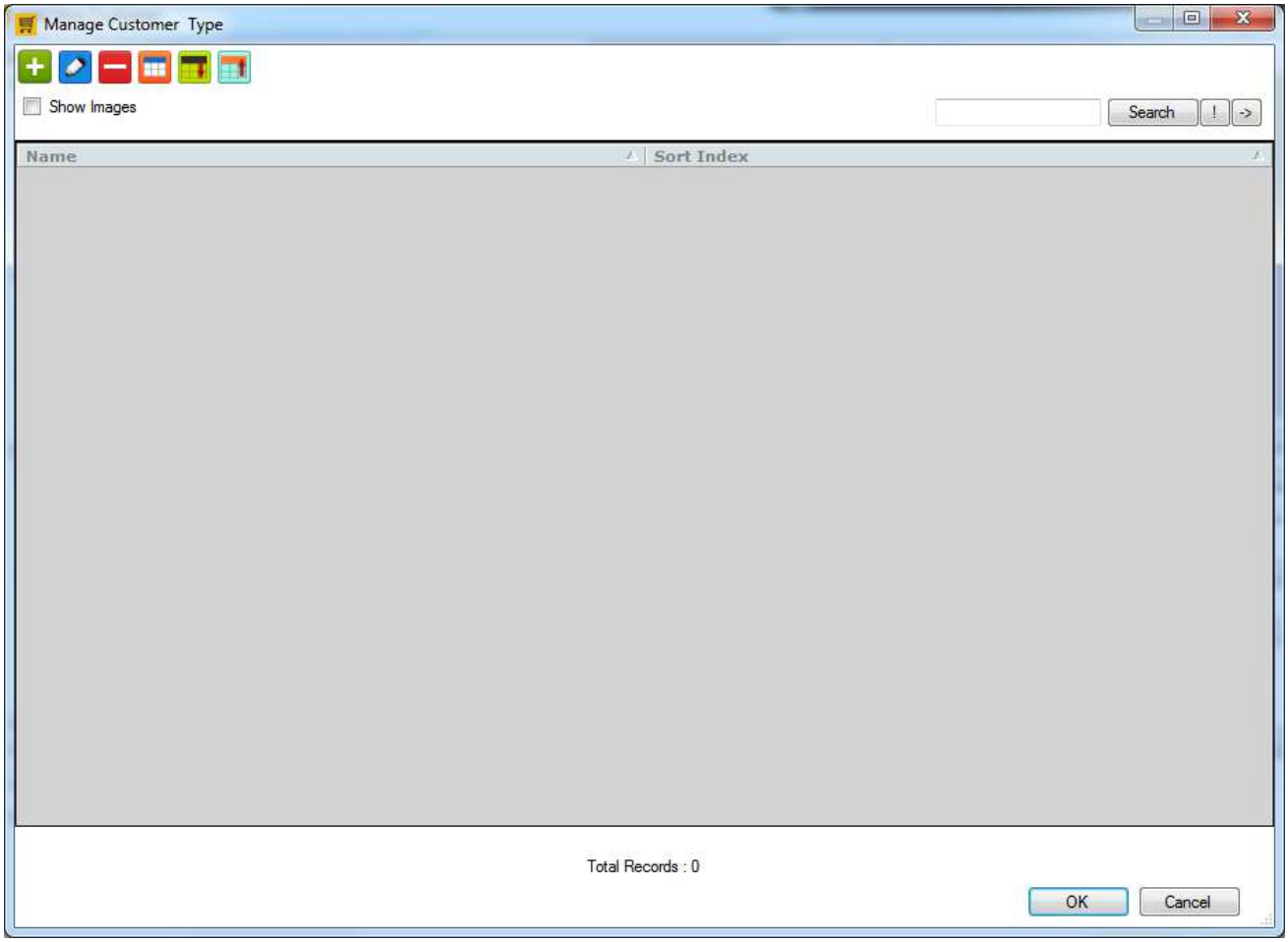
9. From **Manage Customer** screen, Click on **Add /Edit Customer** button.



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



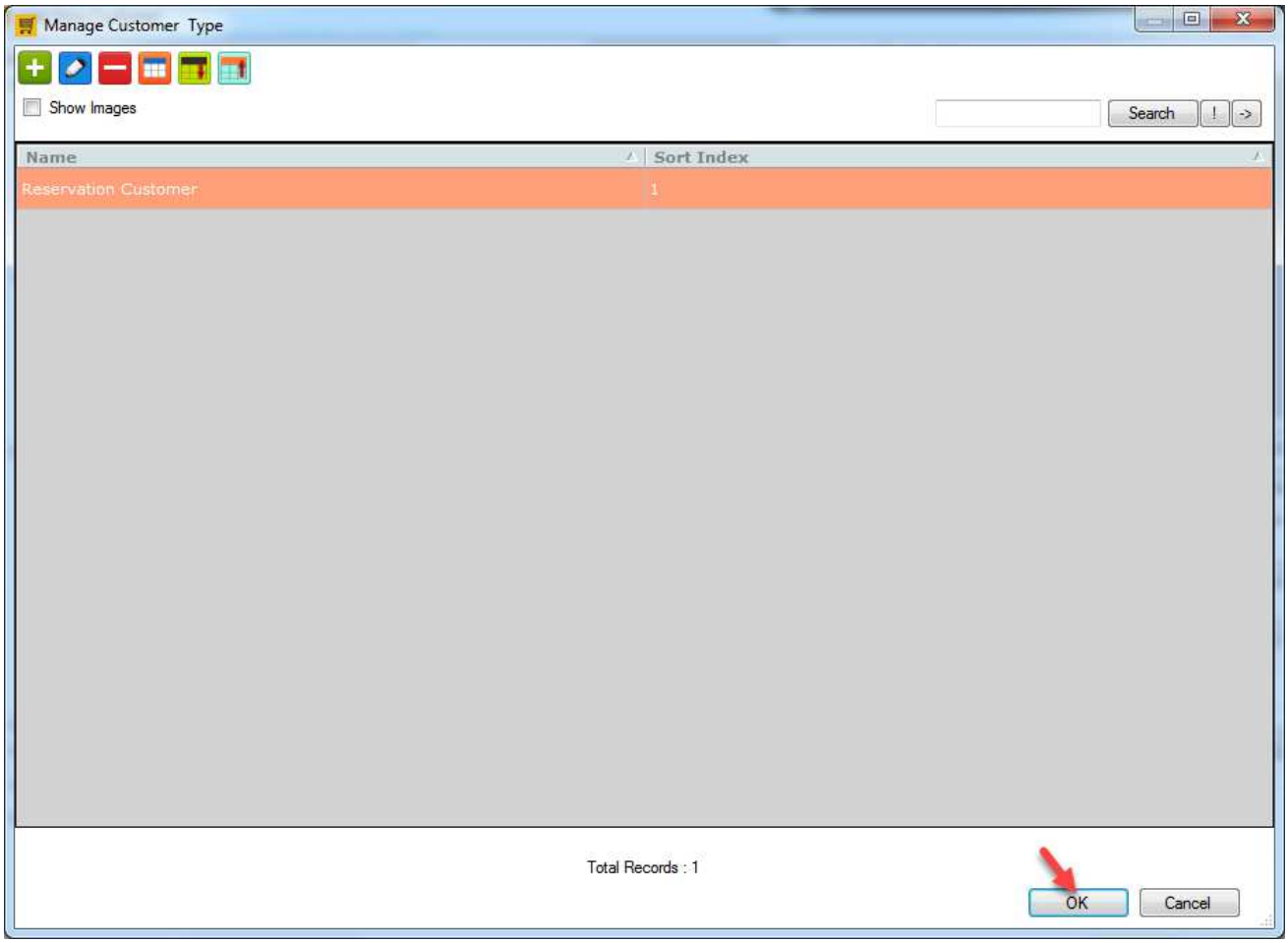
11. Click on button beside that user field, and Manage Customer Type window will be opened.



12. 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.

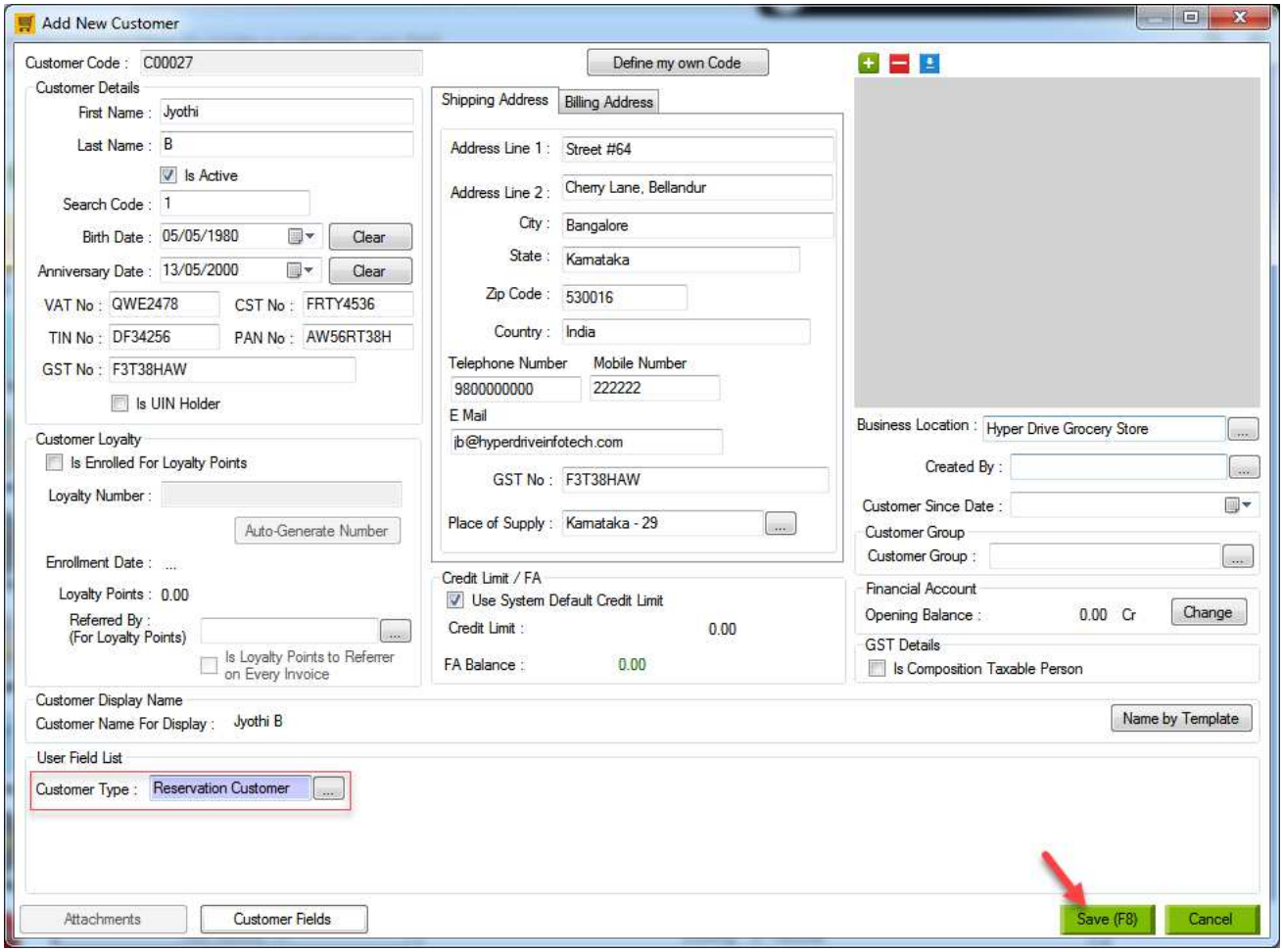


13. You can see all the defined values of user field as shown below.



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

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


Add New Customer
Customer Code : C00027
Define my own Code
Customer Details
First Name : Jyothi
Last Name : B
Is Active
Search Code : 1
Birth Date : 05/05/1980
Clear
Anniversary Date : 13/05/2000
Clear
VAT No : QWE2478
CST No : FRTY4536
TIN No : DF34256
PAN No : AW56RT38H
GST No : F3T38HAW
Is UIN Holder
Shipping Address
Billing Address
Address Line 1 : Street #64
Address Line 2 : Cherry Lane, Bellandur
City : Bangalore
State : Kamataka
Zip Code : 530016
Country : India
Telephone Number
Mobile Number
9800000000
222222
E Mail
jb@hyperdriveinfotech.com
GST No : F3T38HAW
Place of Supply : Kamataka - 29
Business Location : Hyper Drive Grocery Store
Created By :
Customer Since Date :
Customer Group
Customer Group :
Financial Account
Opening Balance : 0.00 Cr
Change
GST Details
Is Composition Taxable Person
Customer Loyalty
Is Enrolled For Loyalty Points
Loyalty Number :
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 : Jyothi B
Name by Template
User Field List
Customer Type : Reservation Customer
Attachments
Customer Fields
Save (F8)
Cancel