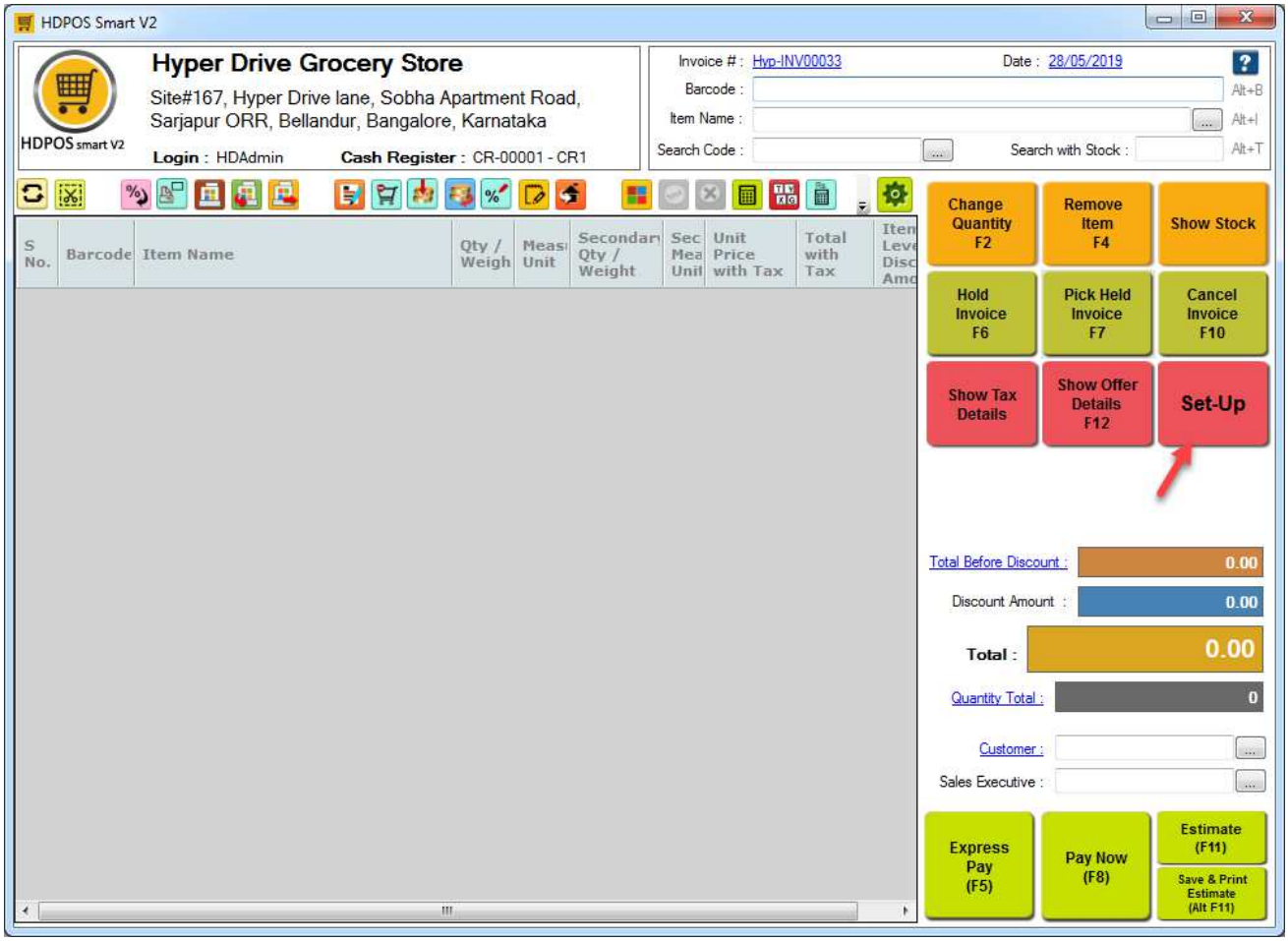
How to define collections for customers?

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

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

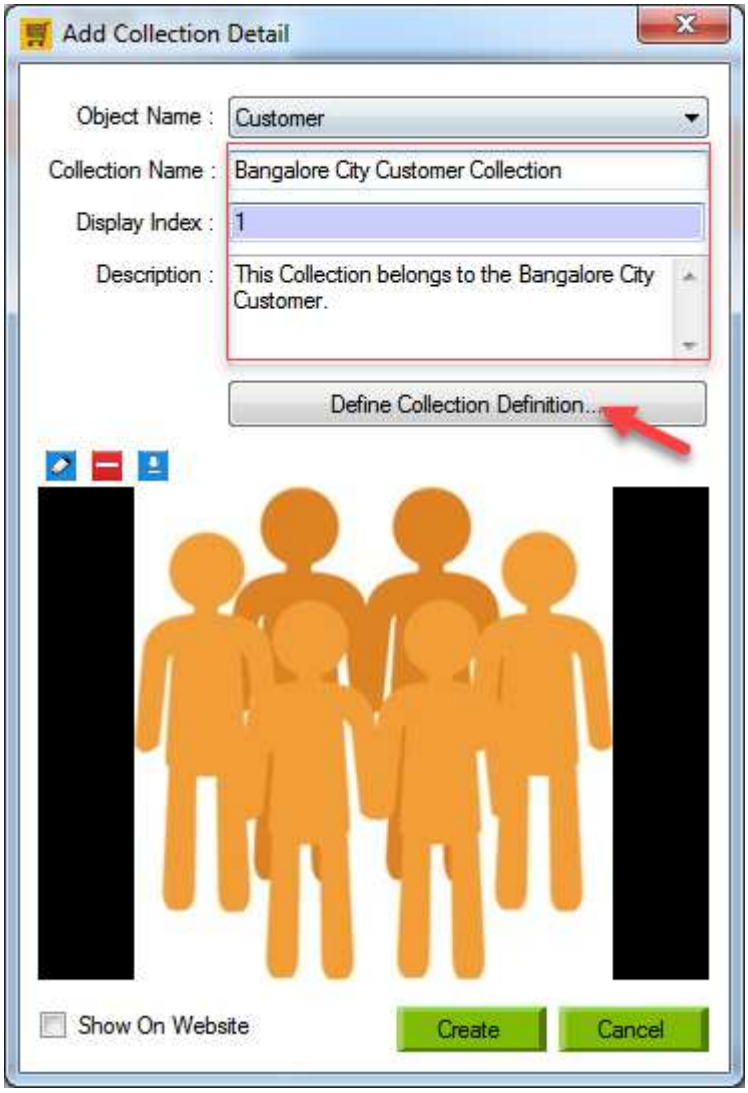


2. Go to **5th Page**, click on **Collections**. From **Manage Collections** screen, click on **Add Collection** button.

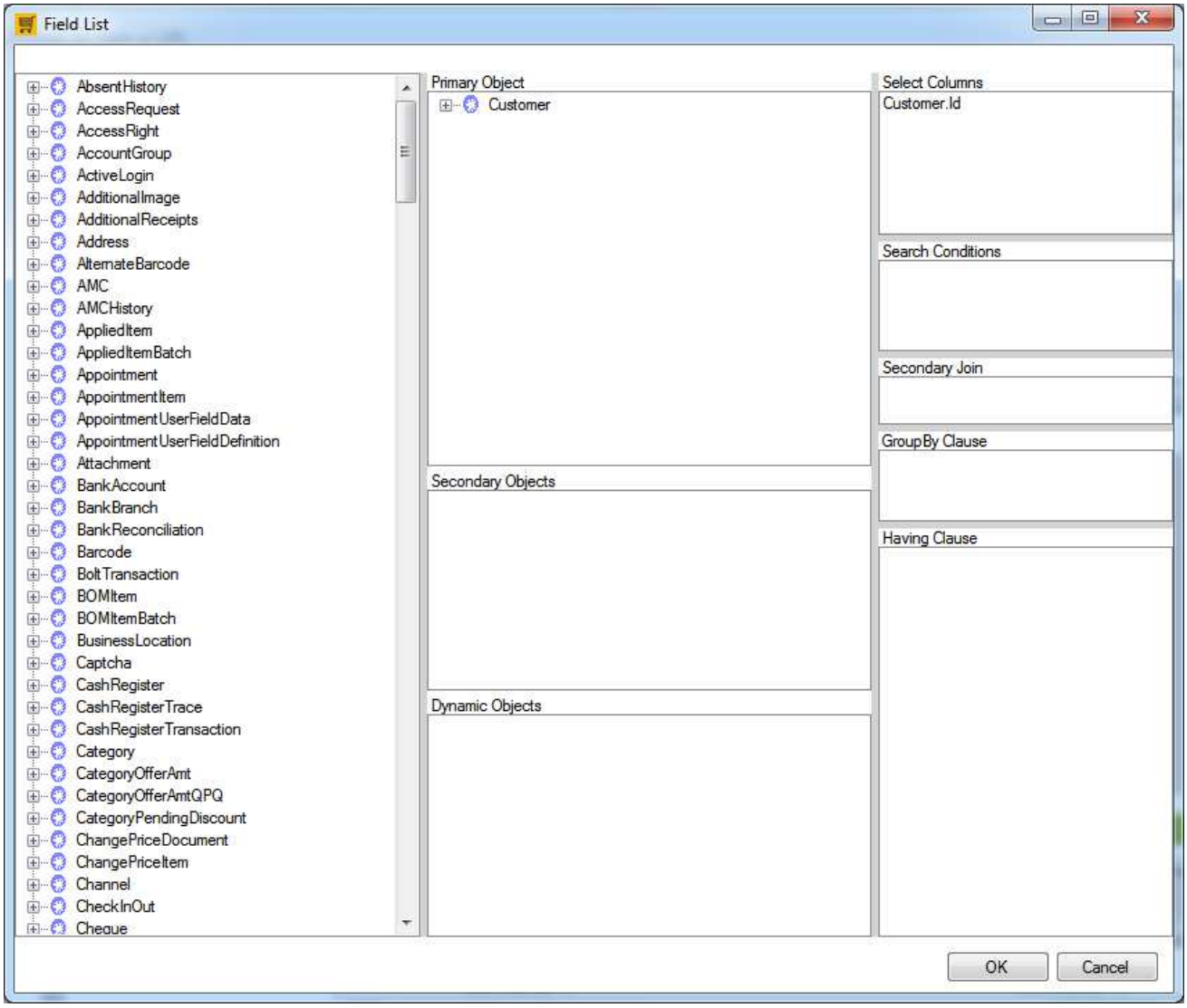


3. In the **Add Collection Detail** enter the required details and click on 'Define Collection Definition'.

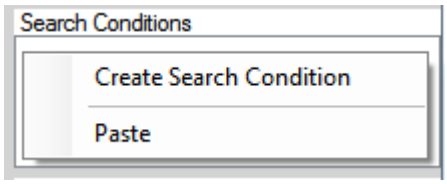
- **Object Name**: Select the object name as **customer.**
- **Collection Name**: Enter a name for **Collection**.
- **Display Index**:Enter a number for **Display Index**.
- **Description**: Enter description about the collection if needed.
- From **Select Object and Descriptions** section, click on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



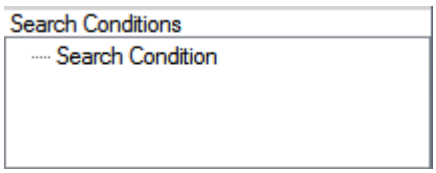
4. You will see the **Field List** screen as shown below.



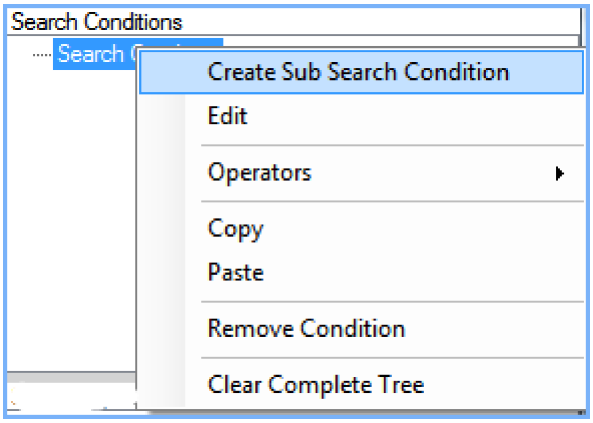
5. Under **Search Condition** section, right click on the mouse and you will see two options as shown below.



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

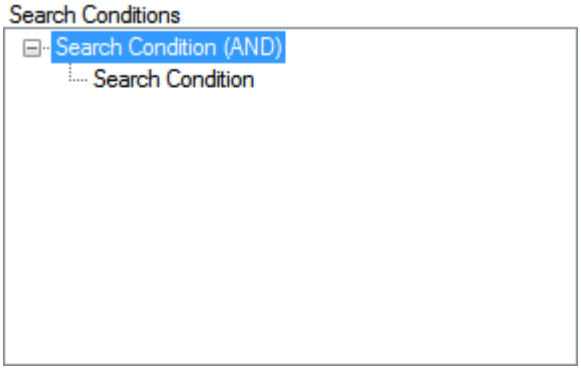


- Right click on Search Condition and you will see as following.

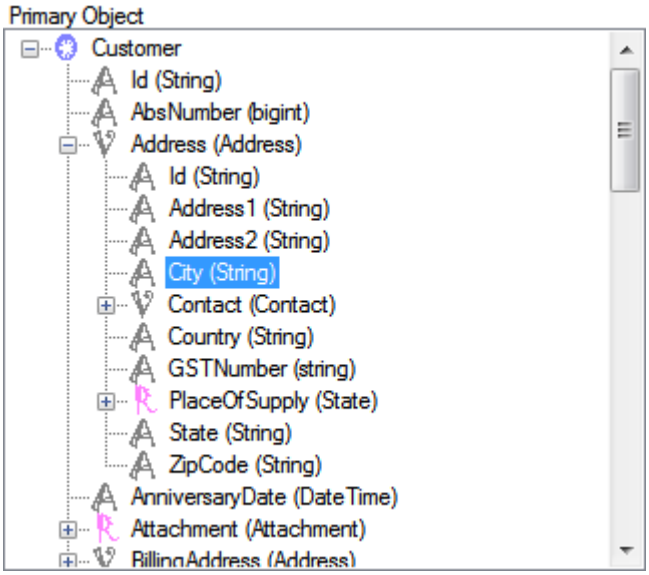


Select **Create Sub Search Condition.**

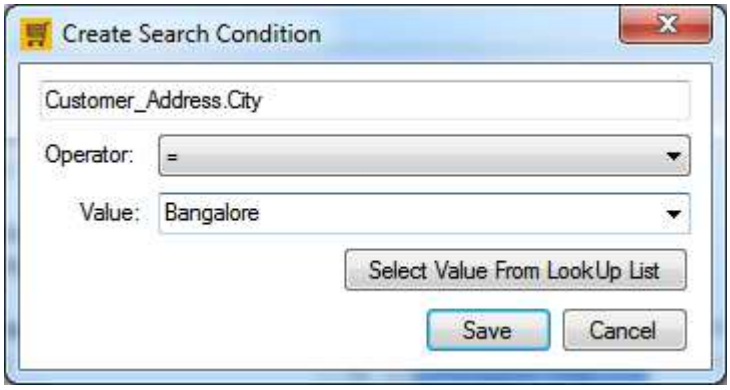
- You will see the screen as shown below. Select the below search condition.



6. In **Primary Object** section :

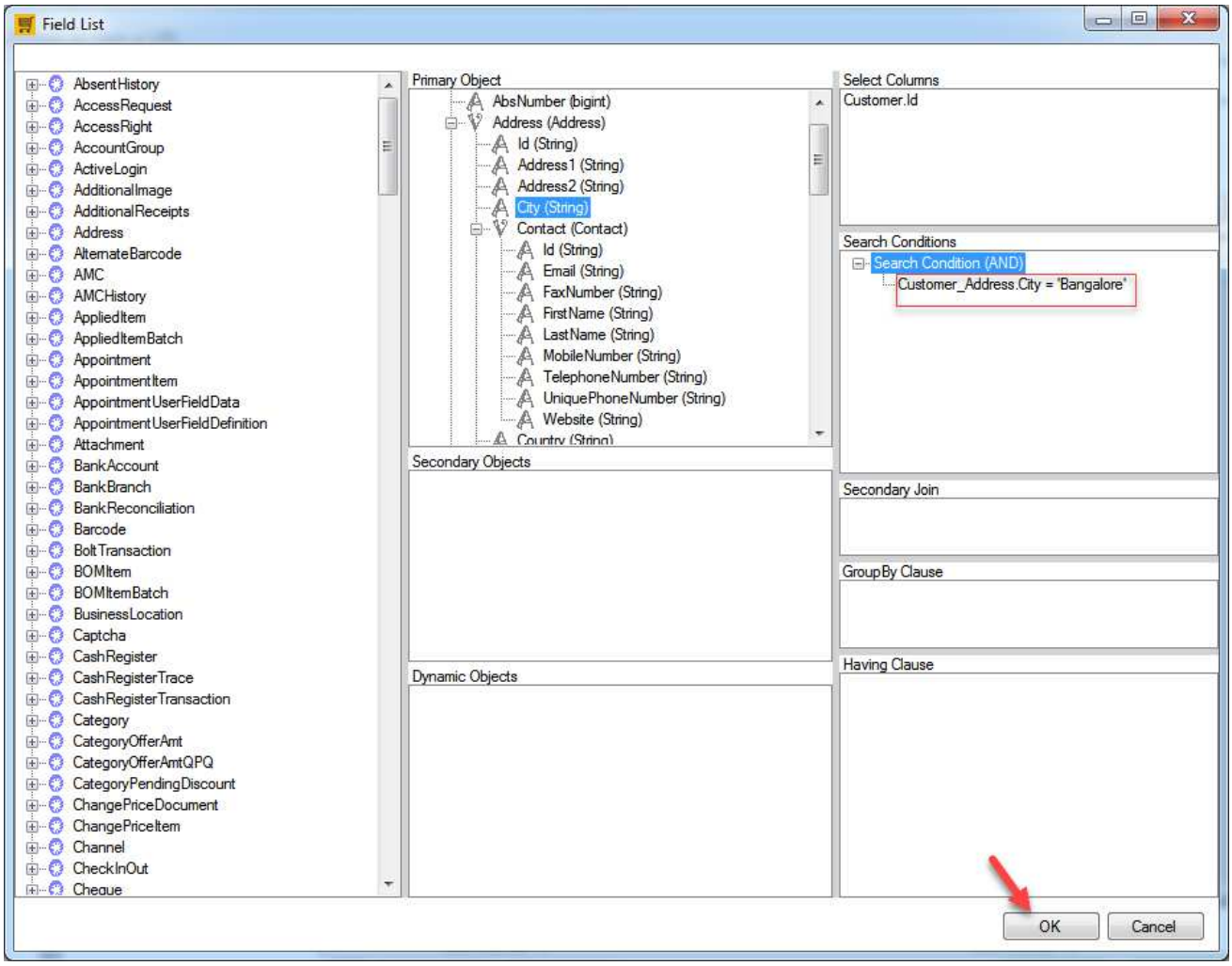


- Click on the plus [+] button beside Customer and you will see all fields defined under it.
- Select Value and expand it by clicking on the plus [+] button beside the value you have selected. In this example I have selected value as **Address**.
- You will see all available attributes under **Address**, 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**.

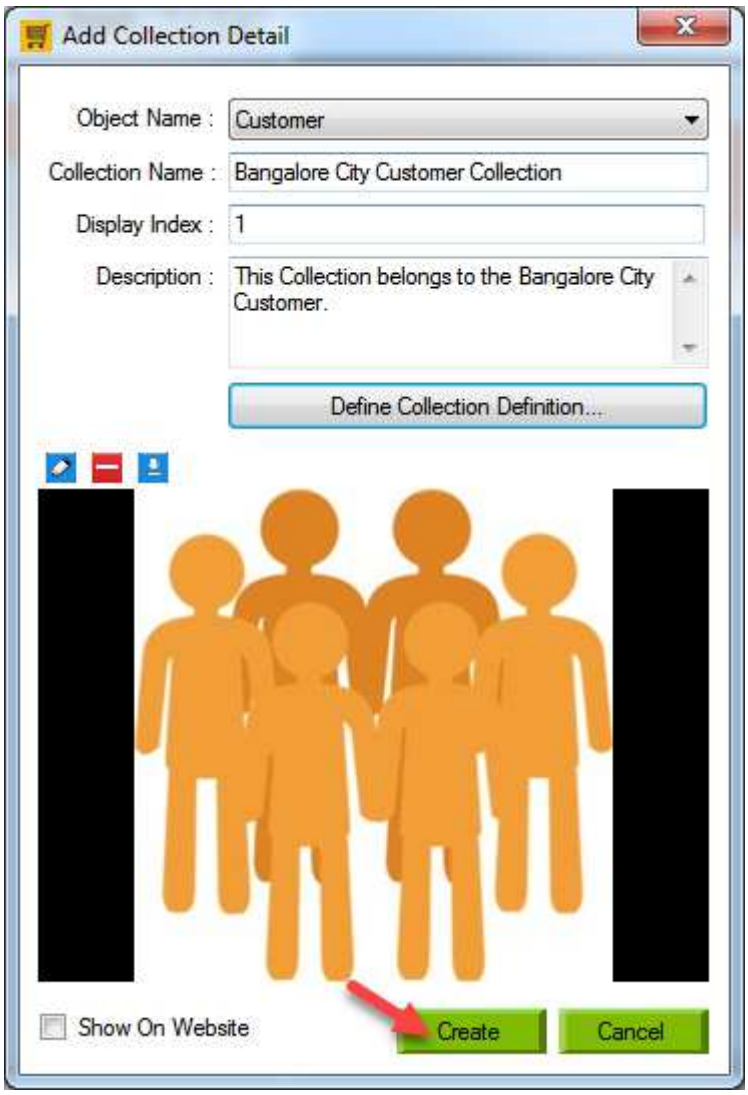


7. Click on **Save**.

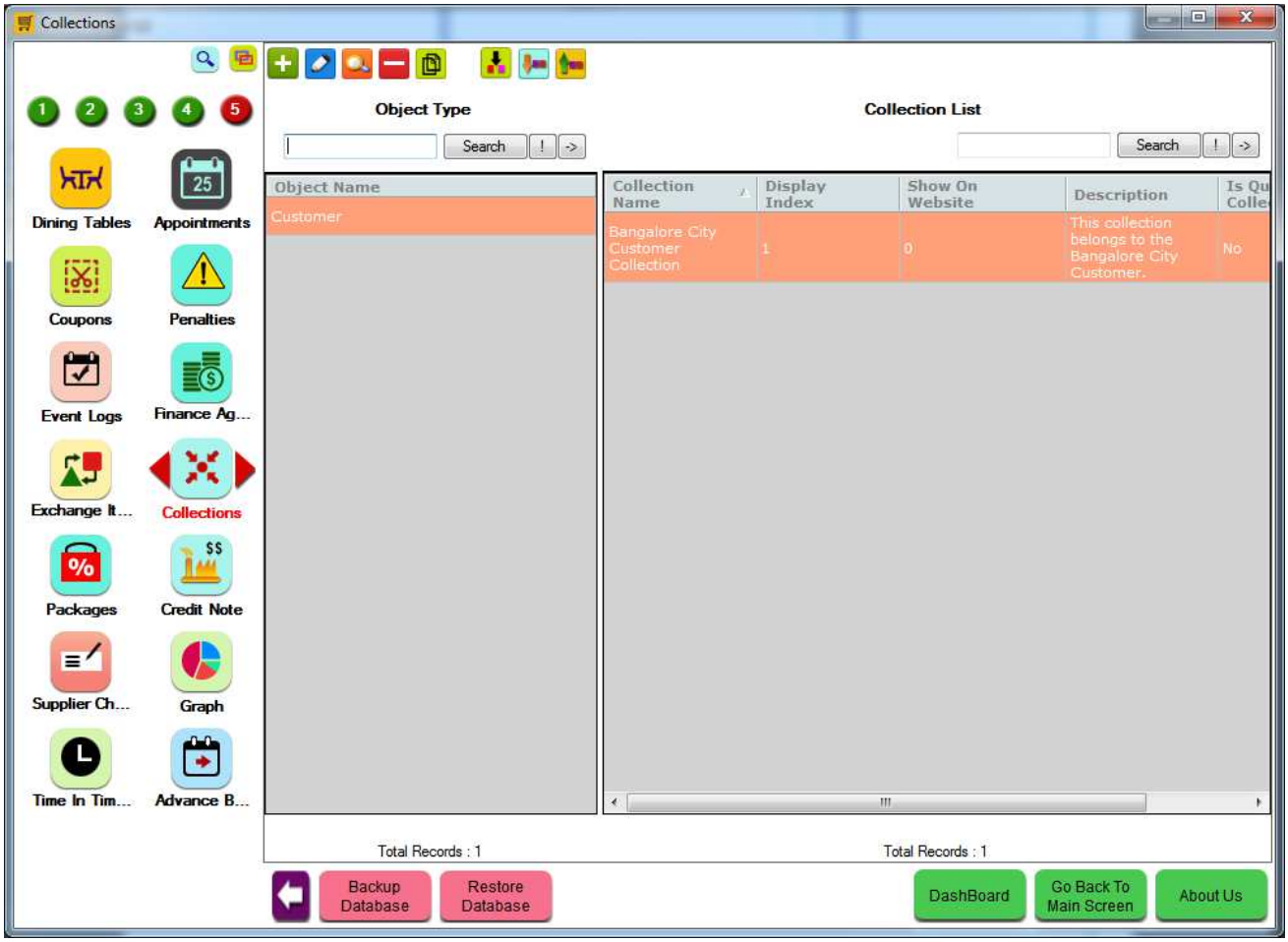
8. Click on **OK** in field list window to save the changes.



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



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


Collections
Dining Tables
Appointments
Coupons
Penalties
Event Logs
Finance Ag...
Exchange It...
Collections
Packages
Credit Note
Supplier Ch...
Graph
Time In Tim...
Advance B...
Object Type
Search
Object Name
Customer
Collection List
Search
Collection Name
Display Index
Show On Website
Description
Bangalore City Customer Collection
1
0
This collection belongs to the Bangalore City Customer.
No
Total Records : 1
Total Records : 1
Backup Database
Restore Database
DashBoard
Go Back To Main Screen
About Us