How to do bulk edit of customers' details?

For editing multiple customer's 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.



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



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

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tems	GRN	Customer Group Show All Search ! >		Show Images Show Only Customer With Pending Payment Days Show Active Show Inactive Also Show InActive				
		Name	Description					Search ! ->
	Ļ	Amazon	Customers who make their purchases from Amazon website	Customer Code	Name 🛆	Search Code	Customer Group Name	Is Enrolled For Loyalty Points
Manage Sto	Transfer St		belong to this group. Regular Customers	C00029	Jyothsna M	101	Regular	No
E		Regular	are grouped under this group name.	C00007	Lakshman Rao		Wholesale	No
Cash Regist	Sales Invoi	Retail		C00006	Mahesh Bhat		Wholesale	No
		Wholesale		C00008	Natasha Jain		Retail	Yes
				C00001	Nayana Singh		Retail	Yes
Customers	Receive Pa			C00010	Ram		Amazon	No
144	17			C00005	Shanti Vishwa		Retail	Yes
Suppliers	Make Paym			C00003	Sindhura Gowda		Retail	Yes
				C00032	Sneha L	104		No
				C00004	Sowmya Raj		Retail	Yes
Business Lo	Sales Returns			C00033	Srujana K			No
2				C00002	Sushma Gowda		Wholesale	No
Employees	Access Rig			C00030 ∢	Sushma M	100		No •
		Total R	ecords : 4	Total Records : 15				
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5. Observe the **Credit Limit**, **Customer Group**, and **User Field** values.

F View Customer				
View Customer Customer Code : C00004 Customer Details First Name : Sowmya Last Name : Raj Vast Name : Raj I is Active Search Code : Binth Date : VAT No : Customer Loyalty I is UIN Holder Customer Loyalty I is Enrolled For Loyalty Points Loyalty Number : LN00004	Shipping Address Billing Address Address Line 1: K.R.Pura Address Line 2: Road No 12 City : Bengalunu State : Kamataka Zip Code :	Business Location : Hyper Drive Grocery Store Created By:		
Enrollment Date : 07/04/2016 Loyalty Points : 4,836.00 Referred By : (For Loyalty Points) Is Loyalty Points to Referrer	Credit Limit / FA Credit Limit / FA Use System Default Credit Limit Credit Limit : 0.00 FA Balance : 0.00 Current Balance Details La Composition Tayable Person	0.00 Db Change		
Customer Display Name Customer Name For Display : Sowmya Raj		Name by Template		
User Field List Customer Type : Attachments Customer Fields	Undate & Next (F7)	Save (F8)		

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.

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		Amazon	Customers who make their purchases from Amazon website	Customer Code	Name 🕹	Search Code	Customer Group Name	Is Enrolled For Loyalty Points
Manage Sto	Transfer St		Regular Customers	C00029	Jyothsna M	101	Regular	No
		Regular	are grouped under this group name.	C00007	Lakshman Rao		Wholesale	No
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		Wholesale		C00008	Natasha Jain		Retail	Yes
	**			C00001	Nayana Singh		Retail	Yes
Customers	Receive Pa			C00010	Ram		Amazon	No
144				C00005	Shanti Vishwa		Retail	Yes
Suppliers	Make Paym			C00003	Sindhura Gowda		Retail	Yes
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Employees	Access Rig			C00030	Sushma M	100		Nn +
		Total Re	ecords : 4	Total Records : 15				
Reports	Barcode Pri	Backup Database	Restore Database				DashBoard M	o Back To About Us

8. Enter the details to be changed in the **Customer Bulk Edit** window.

🛒 Customer Bulk Edit	
Customer Group : Regular	Apply Credit Limit Use System Default Credit Limit Credit Limit : 5,000.00 Change
User Fields Customer Type : Reservation Customer	
	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 : C00004 Customer Details First Name : Sowmva	Shipping Address Billing Address	
Last Name : Raj	Address Line 1: K.R.Pura	
Search Code :	Address Line 2: Head No 12 City : Bengaluru State : Kamataka	
Anniversary Date :	Zip Code :	
GST No :	Telephone Number Mobile Number 1100000015 Send SMS E Mail Business Location : Hyper Drive Grocery St	tore
Customer Loyalty Is Enrolled For Loyalty Points Loyalty Number :	sowmya@xyz.com Send Email GST No : Created By : Customer Since Date : 23/05/2017	
Enrollment Date : 07/04/2016	Place of Supply : Kamataka - 29 Customer Group Credit Limit / FA	
Referred By : (For Loyalty Points) Is Loyalty Points to Referrer on Every Invoice	Use System Default Credit Limit Opening Balance : 0.00 Change FA Balance : 0.00 Current Balance Details GST Details)b Change
Customer Display Name Customer Name For Display : Sowmya Raj		Name by Template
User Field List Customer Type : Reservation Customer		
Attachments Customer Fields	Update & Next (F7) <	8) Close