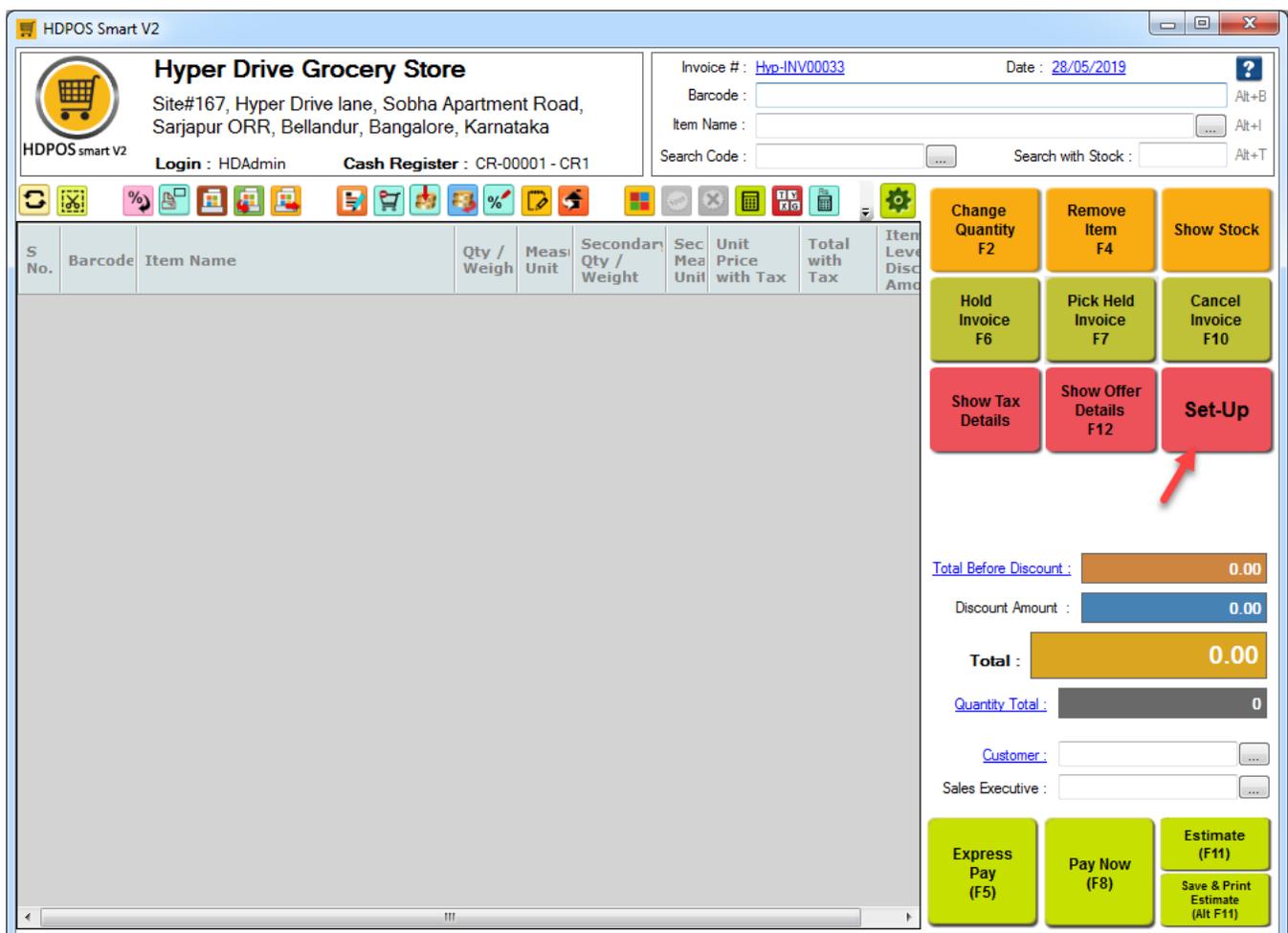


# How to do bulk edit of customers' details?

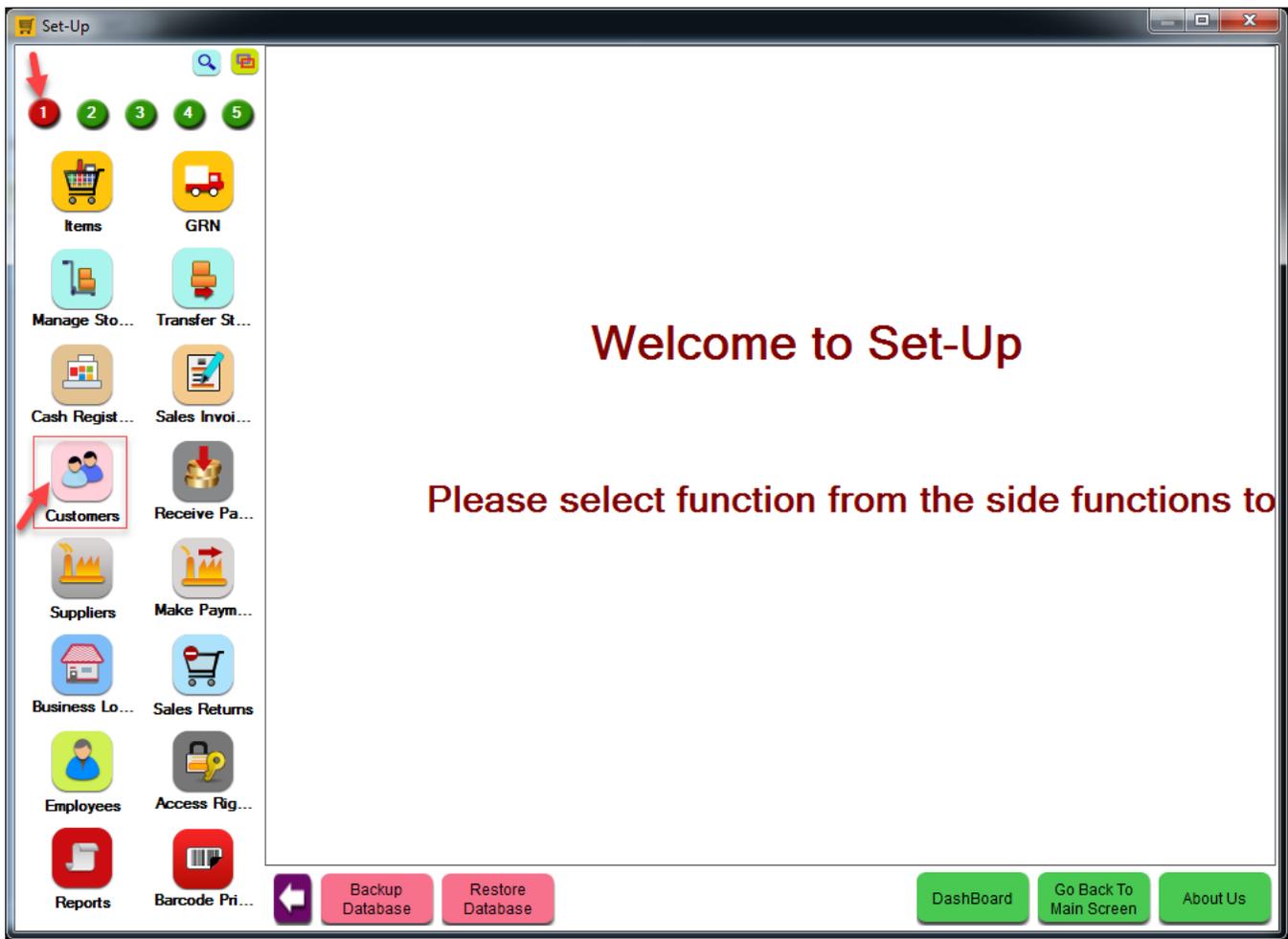
For editing multiple customer's details such as the values in user fields, customers' credit limit, and customer groups- HDPOS smart provides Customer **Bulk Edit** functionality.

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.

**Customer Group**

Show All

Show Only Customer With Pending Payment  Days

Show Active  Show Inactive  Also Show InActive

Name	Description
Amazon	Customers who make their purchases from Amazon website belong to this group.
Regular	Regular Customers are grouped under this group name.
Retail	
Wholesale	

Total Records : 4

Customer Code	Name	Search Code	Customer Group Name	Is Enrolled For Loyalty Points
C00029	Jyothsna M	101	Regular	No
C00007	Lakshman Rao		Wholesale	No
C00006	Mahesh Bhat		Wholesale	No
C00008	Natasha Jain		Retail	Yes
C00001	Nayana Singh		Retail	Yes
C00010	Ram		Amazon	No
C00005	Shanti Vishwa		Retail	Yes
C00003	Sindhura Gowda		Retail	Yes
C00032	Sneha L	104		No
C00004	Sowmya Raj		Retail	Yes
C00033	Srujana K			No
C00002	Sushma Gowda		Wholesale	No
C00030	Sushma M	100		No

Total Records : 15

Buttons: Backup Database, Restore Database, Dashboard, Go Back To Main Screen, About Us

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

**View Customer**

Customer Code : C00004

**Customer Details**

First Name : Sowmya  
 Last Name : Raj  
 Is Active  
 Search Code :  
 Birth Date :  
 Anniversary Date :  
 VAT No : CST No :  
 TIN No : PAN No :  
 GST No :  
 Is UIN Holder

**Customer Loyalty**

Is Enrolled For Loyalty Points  
 Loyalty Number : LN00004  
 Enrollment Date : 07/04/2016  
 Loyalty Points : 4,836.00  
 Referred By :  
 (For Loyalty Points)  
 Is Loyalty Points to Referrer on Every Invoice

**Shipping Address** **Billing Address**

Address Line 1 : K.R.Pura  
 Address Line 2 : Road No 12  
 City : Bengaluru  
 State : Karnataka  
 Zip Code :  
 Country :  
 Telephone Number : Mobile Number : 1100000015   
 E Mail : sowmya@xyz.com   
 GST No :  
 Place of Supply : Karnataka - 29

**Credit Limit / FA**

Use System Default Credit Limit  
 Credit Limit : 0.00  
 FA Balance : 0.00

**Customer Display Name**

Customer Name For Display : Sowmya Raj

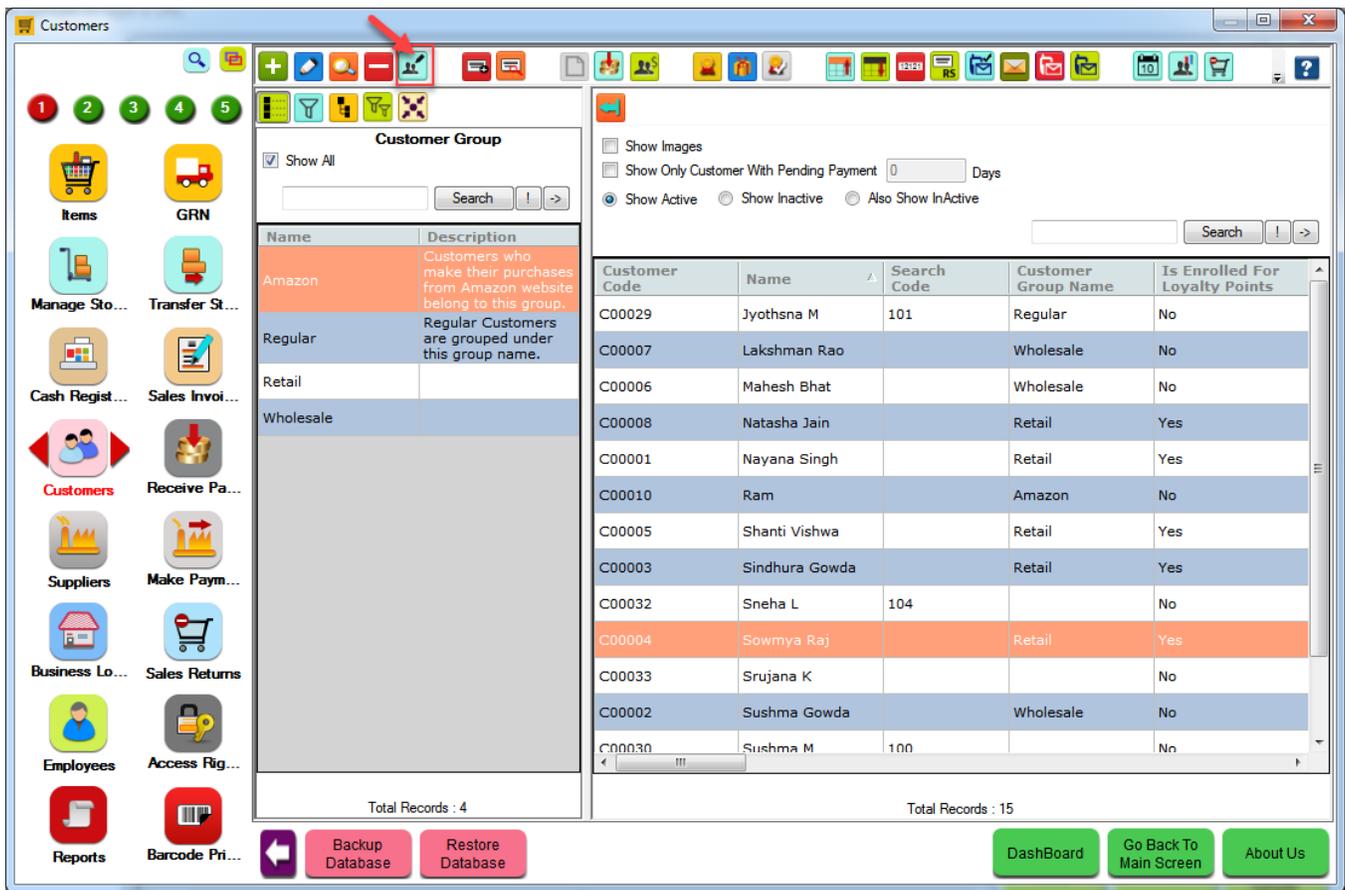
**User Field List**

Customer Type :

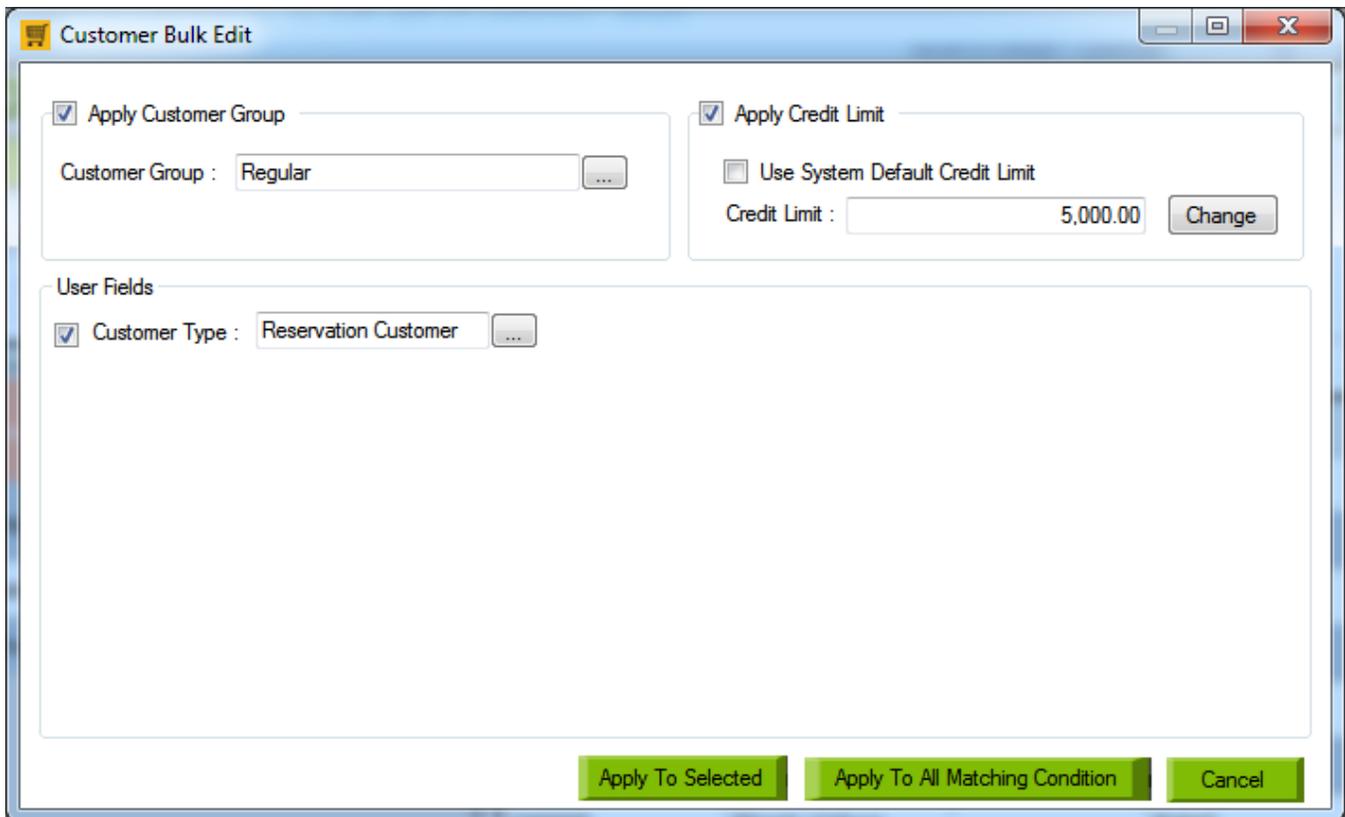
**Business Location** : Hyper Drive Grocery Store  
 Created By :  
 Customer Since Date : 23/05/2017  
**Customer Group** : Retail  
**Financial Account**  
 Opening Balance : 0.00 Db   
**GST Details**  
 Is Composition Taxable Person

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**.



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



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 : Sowmya  
 Last Name : Raj  
 Is Active  
 Search Code :  
 Birth Date :  
 Anniversary Date :  
 VAT No : CST No :  
 TIN No : PAN No :  
 GST No :  
 Is UIN Holder

**Shipping Address** **Billing Address**

Address Line 1 : K.R.Pura  
 Address Line 2 : Road No 12  
 City : Bengaluru  
 State : Karnataka  
 Zip Code :  
 Country :  
 Telephone Number : Mobile Number : 1100000015   
 E Mail : sowmya@xyz.com   
 GST No :  
 Place of Supply : Karnataka - 29

**Credit Limit / FA**

Use System Default Credit Limit  
 Credit Limit : 5,000.00   
 FA Balance : 0.00

**Customer Loyalty**

Is Enrolled For Loyalty Points  
 Loyalty Number : LN00004  
 Enrollment Date : 07/04/2016  
 Loyalty Points : 4,836.00  
 Referred By : (For Loyalty Points)  
 Is Loyalty Points to Referrer on Every Invoice

**Customer Display Name**

Customer Name For Display : Sowmya Raj

**User Field List**

Customer Type : Reservation Customer

Business Location : Hyper Drive Grocery Store  
 Created By :  
 Customer Since Date : 23/05/2017  
**Customer Group**  
 Customer Group : Regular  
**Financial Account**  
 Opening Balance : 0.00 Db   
**GST Details**  
 Is Composition Taxable Person

