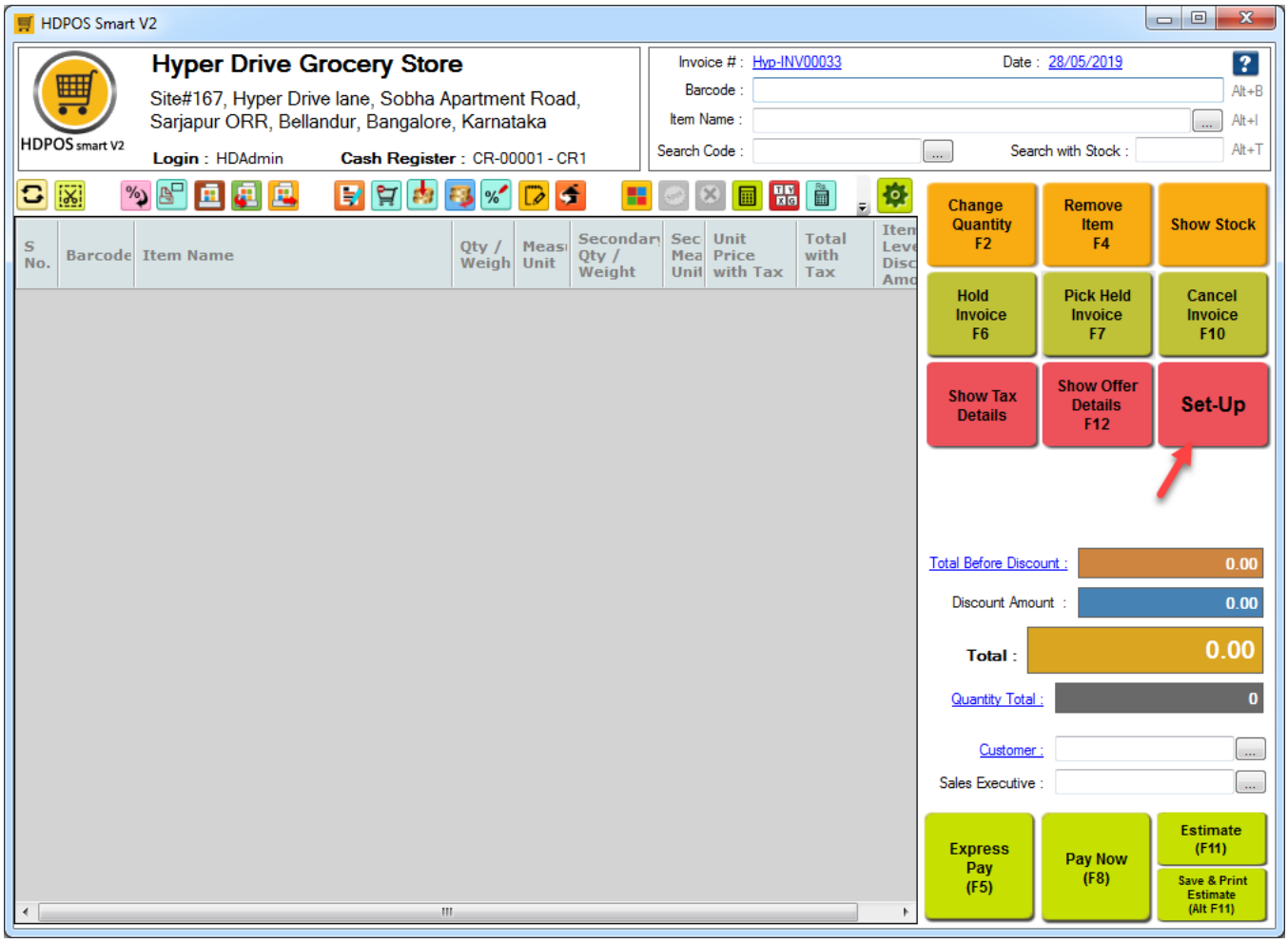
How to add customers in bulk using an excel file in HDPOS smart?

To do bulk upload customers using an excel file, please follow the steps below.

1. Run **HDPOS smart**. From the main invoice screen, click on **Set-Up**.



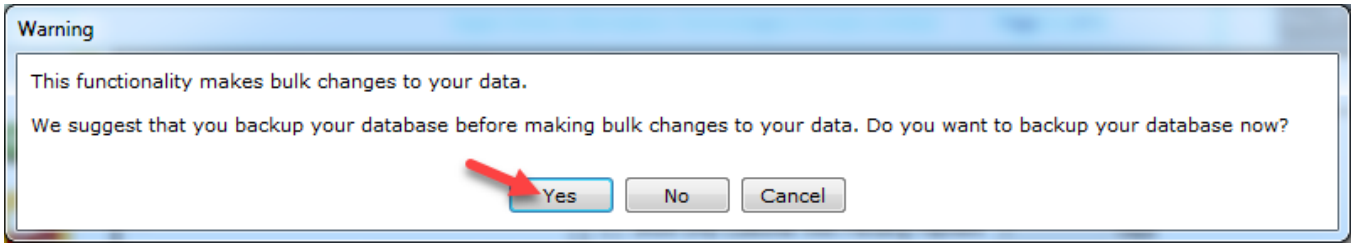
2. From the 1st page, click on **Customer**.



3. From **Manage Customer** screen, click on **Upload Customers** button.

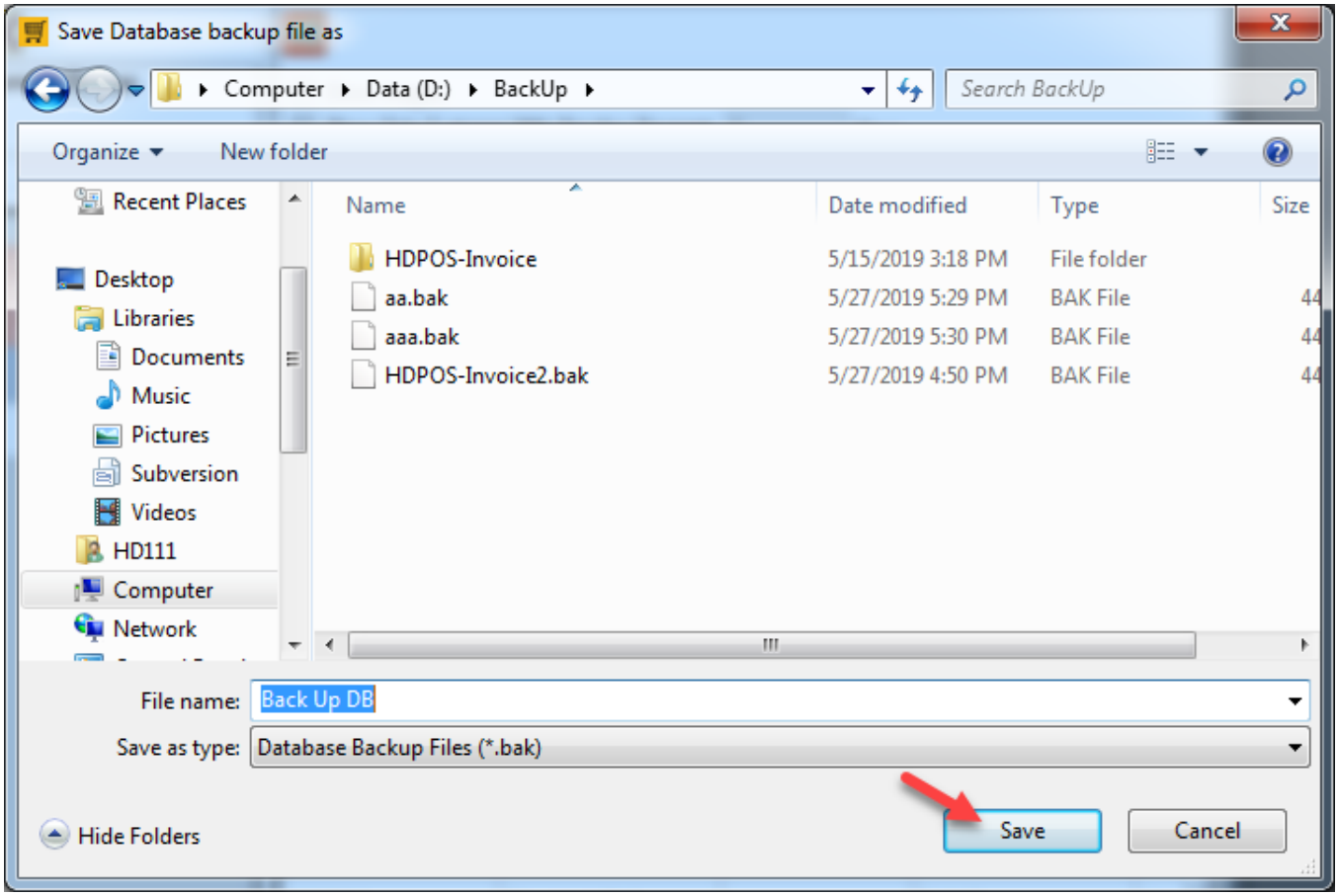


4. A warning message will be displayed for you to take the back up of database.

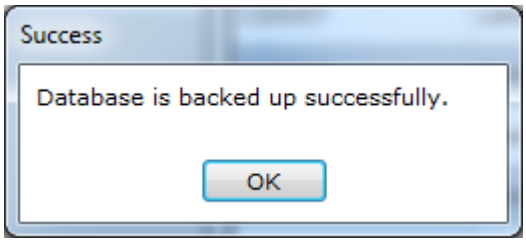


5. Click on **Yes** to take a back up of your database.

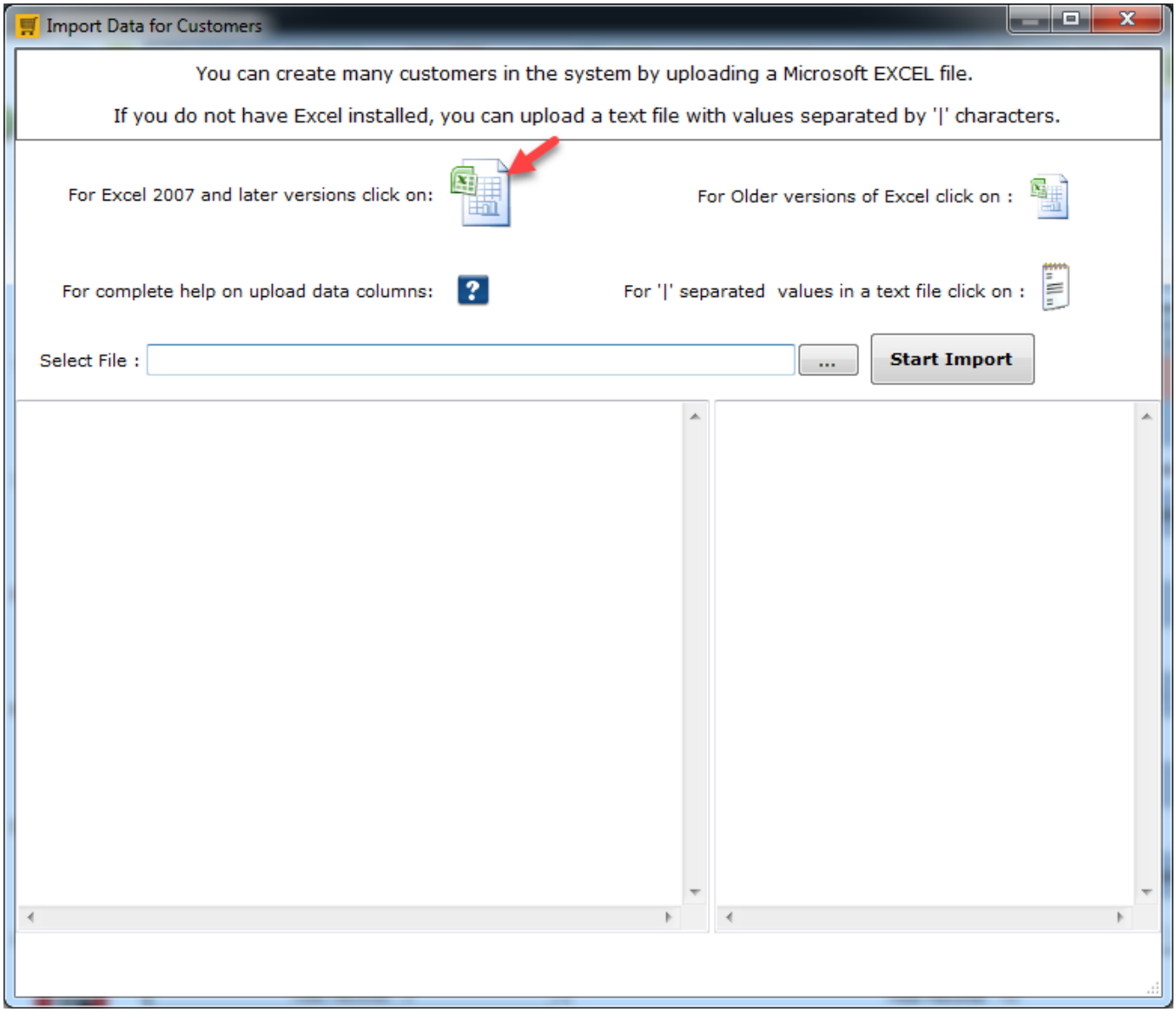
a. A screen will be shown to you to save this back up file. Choose a folder and enter any name for back up file. Click on **Save**.



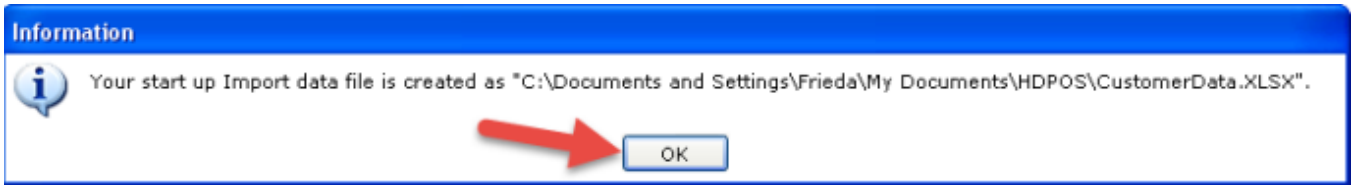
b. A message will be shown to you as database back up gets completed. Click on **OK**.



6. **Import Data for Items** screen will get opened. Click on button according to the version of excel you have in your computer.



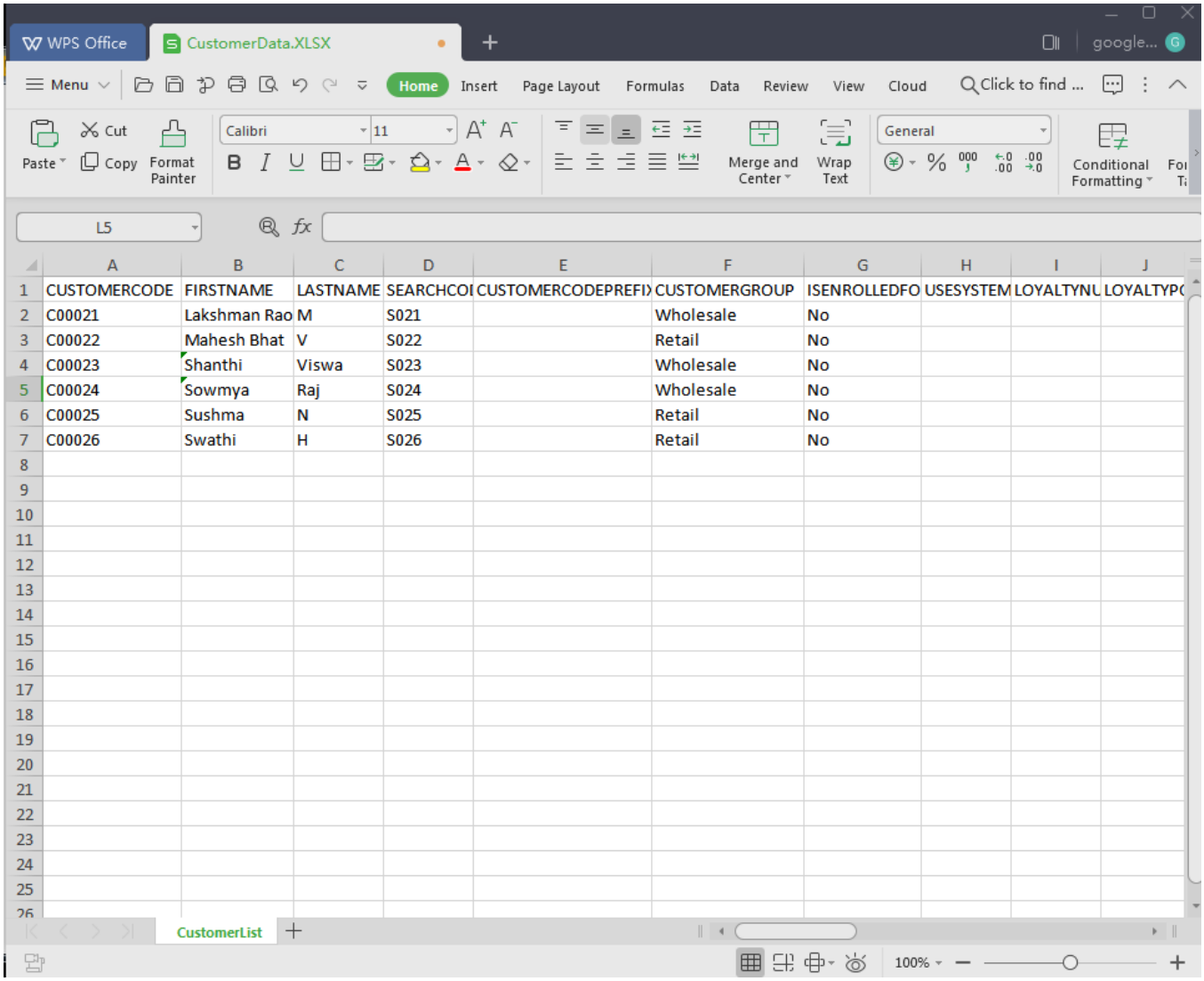
7. A message will be shown with the location of the excel file that gets created to enter details of customers. Click on **OK**.



8. In the excel file that got opened, enter all details of customers for your business.

a. Mandatory Field in this excel file is **First Name**.

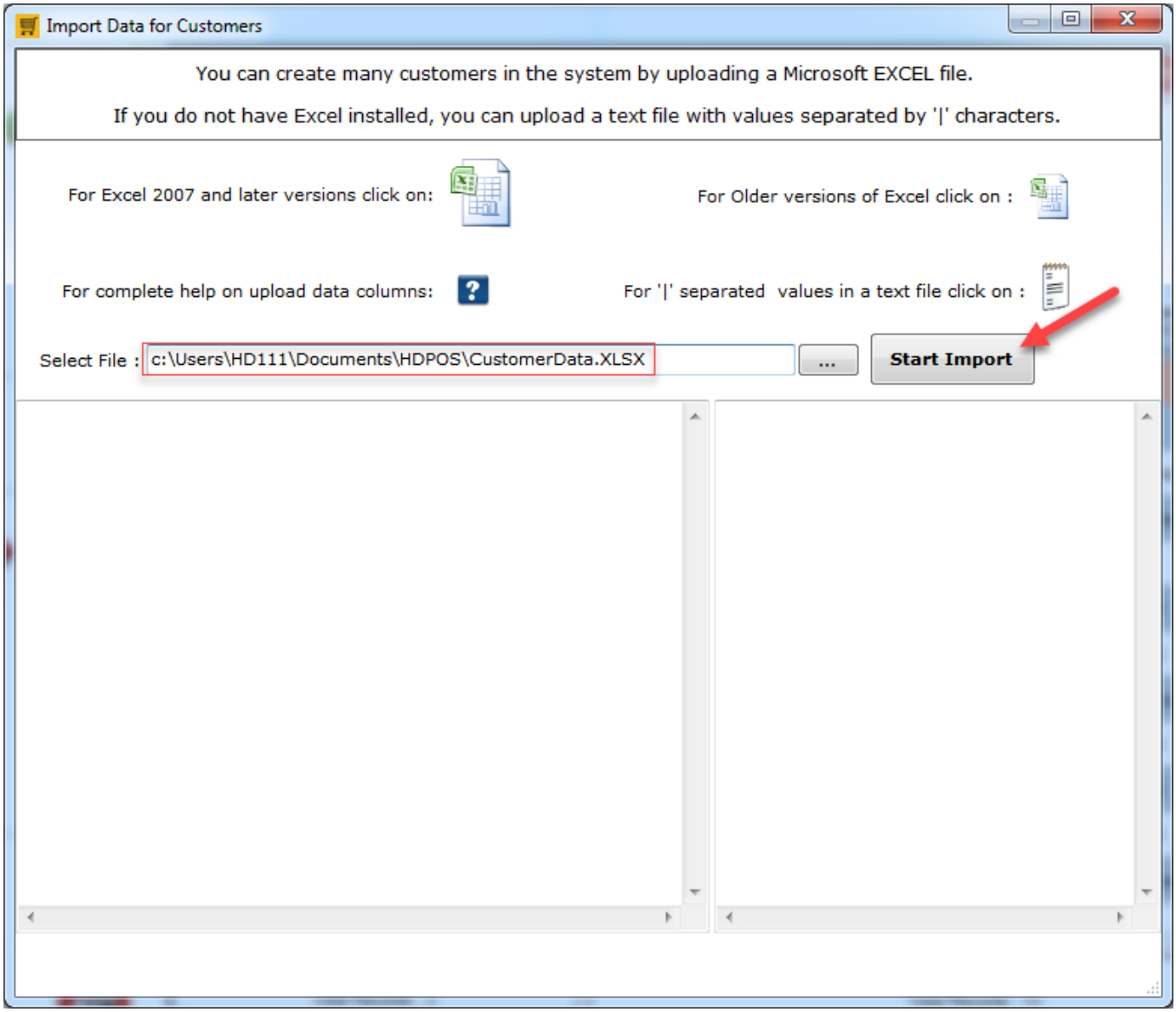
b. If you don't enter any Customer Code, it will be generated automatically by the HDPOS.



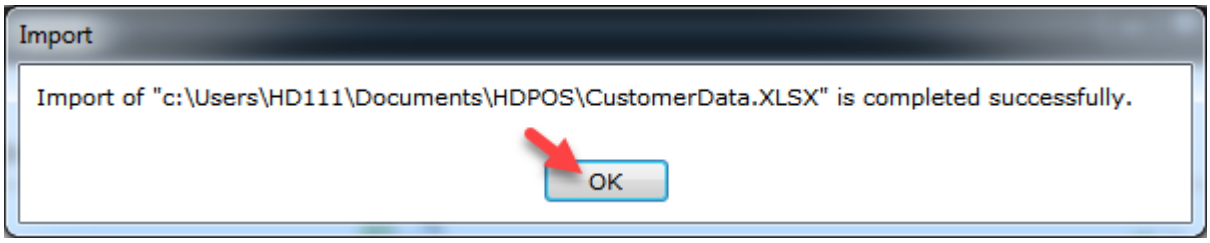
	A	B	C	D	E	F	G	H	I	J
1	CUSTOMERCODE	FIRSTNAME	LASTNAME	SEARCHCOI	CUSTOMERCODEPREFI	CUSTOMERGROUP	ISENROLLEDFO	USESYSTEM	LOYALTYNU	LOYALTYPC
2	C00021	Lakshman Rao	M	S021		Wholesale	No			
3	C00022	Mahesh Bhat	V	S022		Retail	No			
4	C00023	Shanthi	Viswa	S023		Wholesale	No			
5	C00024	Sowmya	Raj	S024		Wholesale	No			
6	C00025	Sushma	N	S025		Retail	No			
7	C00026	Swathi	H	S026		Retail	No			

9. After entering all details of customers. Save and close the excel file.

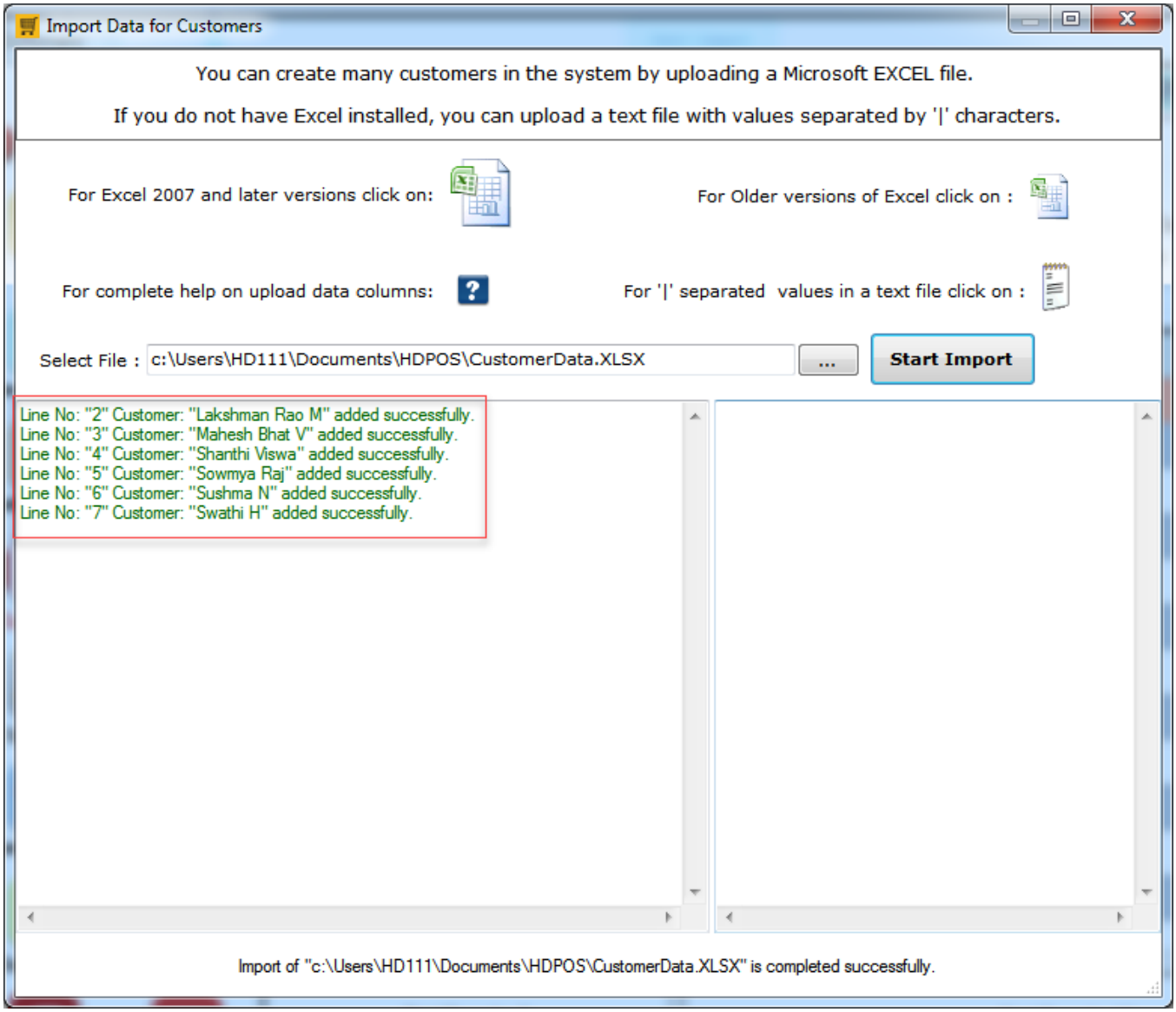
10. Go back to HDPOS smart. In **Import Data for Customers** screen, select the saved excel file of items by clicking on beside **Select File** field. Click on **Start Import** button.



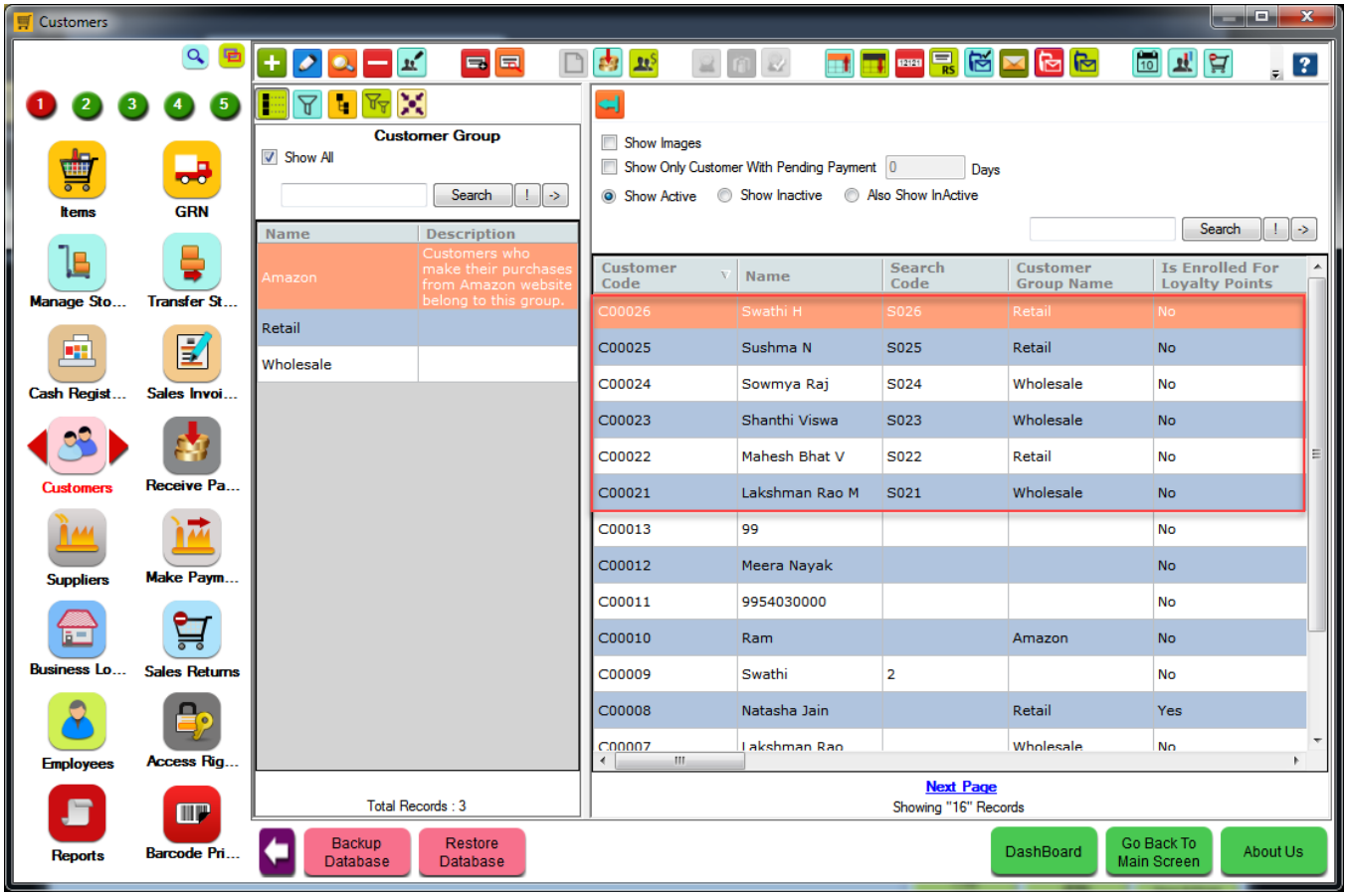
11. All details will be validated and a message will be shown to you. Click on **OK**.



12. You can see all customer details are added into screen.



13. Close the above screen and you can see all customer details got uploaded into HDPOS smart.


Customers
Items
GRN
Manage Sto...
Transfer St...
Cash Regist...
Sales Invoi...
Customers
Receive Pa...
Suppliers
Make Paym...
Business Lo...
Sales Returns
Employees
Access Rig...
Reports
Barcode Pri...
Customer Group
Show All
Search
Name
Description
Amazon
Customers who make their purchases from Amazon website belong to this group.
Retail
Wholesale
Total Records : 3
Show Images
Show Only Customer With Pending Payment
0
Days
Show Active
Show Inactive
Also Show InActive
Search
Customer Code
Name
Search Code
Customer Group Name
Is Enrolled For Loyalty Points
C00026 Swathi H S026 Retail No
C00025 Sushma N S025 Retail No
C00024 Sowmya Raj S024 Wholesale No
C00023 Shanthi Viswa S023 Wholesale No
C00022 Mahesh Bhat V S022 Retail No
C00021 Lakshman Rao M S021 Wholesale No
C00013 99 No
C00012 Meera Nayak No
C00011 9954030000 No
C00010 Ram Amazon No
C00009 Swathi 2 No
C00008 Natasha Jain Retail Yes
C00007 Lakshman Rao Wholesale No
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