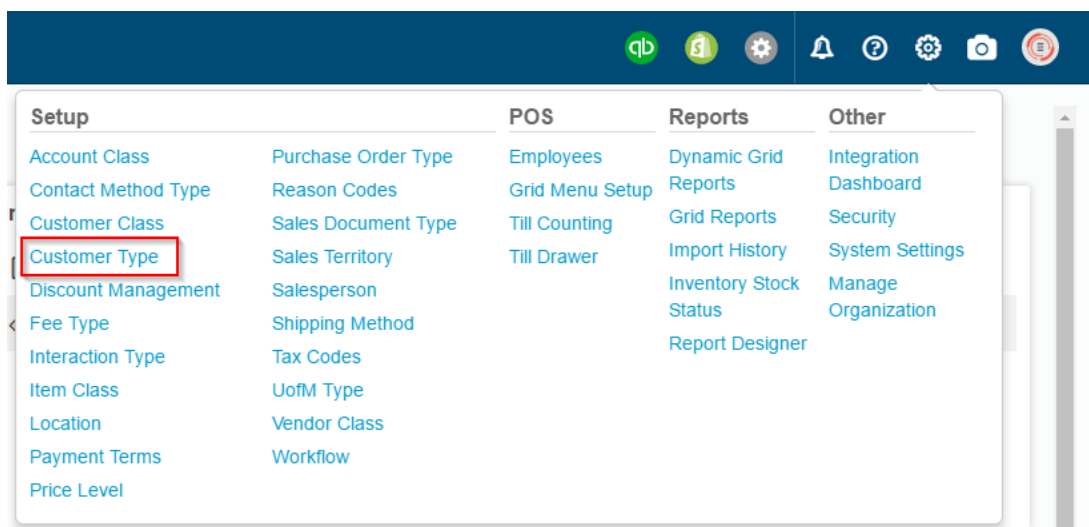# Customer Type

Megan De Freitas - 2024-12-02 - Settings

Overview

Customer Type is similar to [Customer Class](#) in that it is a means of categorizing customers. Use Customer Class and Customer Type together to manage your customers more effectively.

To get started, select **Customer Type** from the Settings menu.

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Customer Type

Create a Customer Type

To create a Customer Type, click the **New Customer Type** button in the upper left-hand corner of the screen.

Give the Customer Type a name in the Customer Type drawer that appears, then click **Save**.

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Edit a Customer Type

To edit an existing Customer Type, first select the Customer Type from the list on the left-hand side of the Customer Type window.

Once you've selected the Customer Type you want to edit, make your changes in the information fields on the right-hand side of the screen.

When you've finished making your changes, click **Save**.

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See it in Action

Customer Types are assigned to [Customers](#) in the New or Edit Customer drawers.

Edit Customer

✖

Customer Name

Walk-in Customer

Customer Type

No Customer Type ▼

Customer Class

No Customer Class ▼

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