

<u>Knowledgebase</u> > <u>Settings</u> > <u>Customer Type</u>

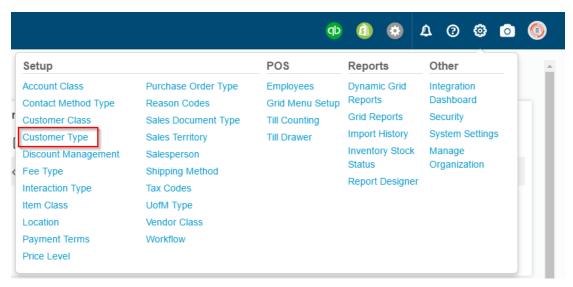
Customer Type

Cavallo Support - 2025-06-10 - 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.

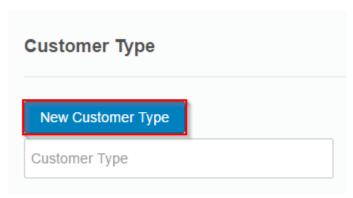
To get started, select **Customer Type** from the Settings menu.



Customer Type

Create a Customer Type

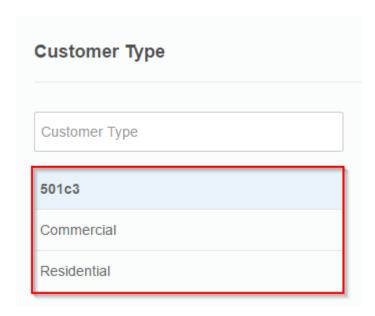
 $To \ create \ a \ Customer \ Type, \ click \ the \ \textbf{New Customer Type} \ button \ in \ the \ upper \ left-hand \ corner \ of \ the \ screen.$



Give the Customer Type a name in the Customer Type drawer that appears, then click \mathbf{Save} .

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.

See it in Action

Customer Types are assigned to Customers in the New or Edit Customer drawers.

