



## 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.



### Navigation Menu

- [Customer Type](#)
  - [Create a Customer Type](#)
  - [Edit a Customer Type](#)
- [See it in Action](#)

### 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**.

[Back to Navigation Menu](#)

#### 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**.

[Back to Navigation Menu](#)

**See it in Action**

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



[Back to Navigation Menu](#)