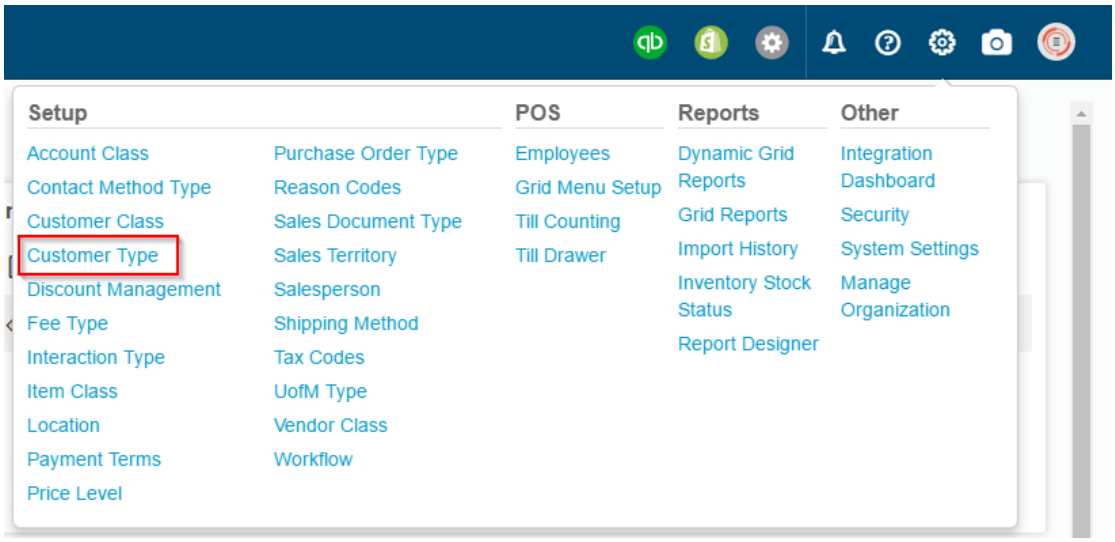
Customer Type

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.

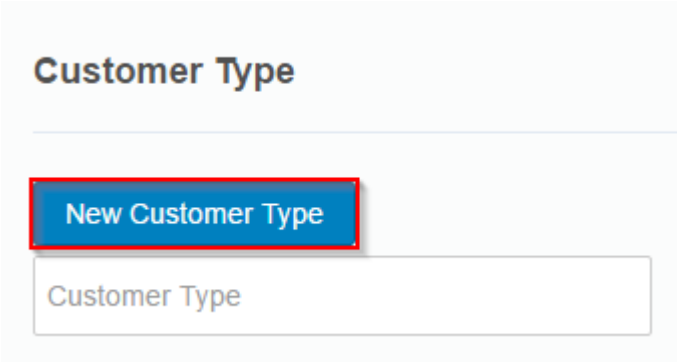
To get started, select **Customer Type** from the Settings menu.



Customer Type

Create a Customer Type

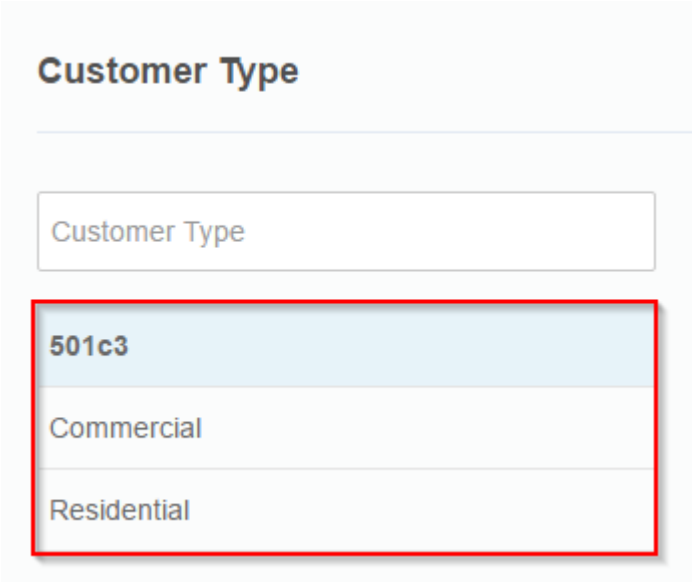
To create a Customer Type, click the **New Customer Type** button in the upper left-hand corner of the screen.



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

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.

