



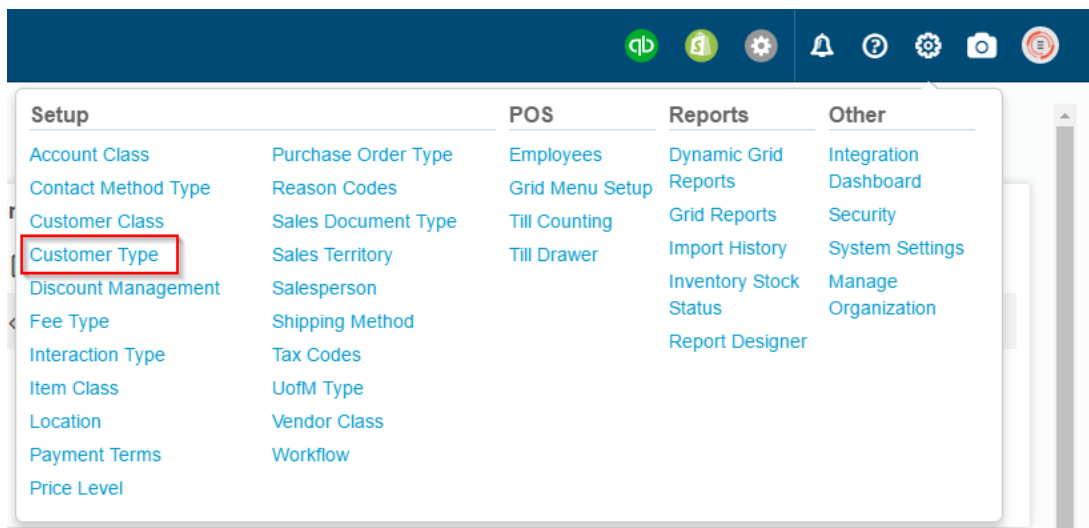
Customer Type

Megan De Freitas - 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.

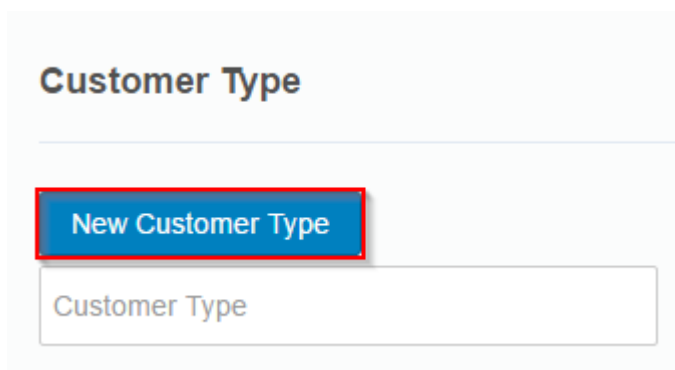
To get started, select **Customer Type** from the Settings menu.



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.

Customer Type

Customer Type

501c3

Commercial

Residential

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.

Customer Type

Commercial

☐ Inactive

Save

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.

Feedback

Edit Customer

Customer Name

Walk-in Customer

Customer Type

No Customer Type

Customer Class

No Customer Class