

Customer Types

Last Modified on 01/20/2023 3:41 pm EST

Create “Customer Types” to be used for reporting purposes. Assigning a customer type is a required field when adding a new customer.

Adding a new Customer Type

Click “Add Customer Type” in the upper left corner of the page.

Customer Types

Customer Types		<input type="checkbox"/> Show Inactive Customer Types
+ Add Customer Type		
Name		
Commercial	Edit	Delete
Office	Edit	Delete

Name

Input a name to describe the customer type.

Name	
<input type="text" value="Residential"/>	Update Cancel

Update

Click update on the right side of the screen to save.