Types of Customers

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There are two types of customers available within the application, regular customers and master customers.

Regular Customer

A Regular customer may be residential or commercial and has between one and ten sites attached.

Master Customer

A Master Customer may be residential or commercial but typically is the commercial type. Master customers are used when you have a customer with many sites and they are all invoicing to the same address.

When creating a new customer, there is a toggle button, Master Customer? If this is set to On, this becomes a Master Customer. Once the Master Customer is saved, you can link other customer records to this Master Customer. On the Customer setup form there is a field labeled **Master Customer**; this is a drop-down list showing all customers that have been setup as a Master Customer. Selecting a Master Customer from the list links the customer to the Master Customer.