

Customer Types Overview

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When creating a new Customer record, the Customer Type is a required field. The Customer Type is used to define the individual or company you are doing business with. Customer Types may be general or specific. For example, you may create customer types that are very generic, such as Commercial and Residential. If you want to be more granular with your commercial type customers, you may create more specific types, such as National Account, Bank, School, Retail, etc. Customer types provide a useful reporting tool.