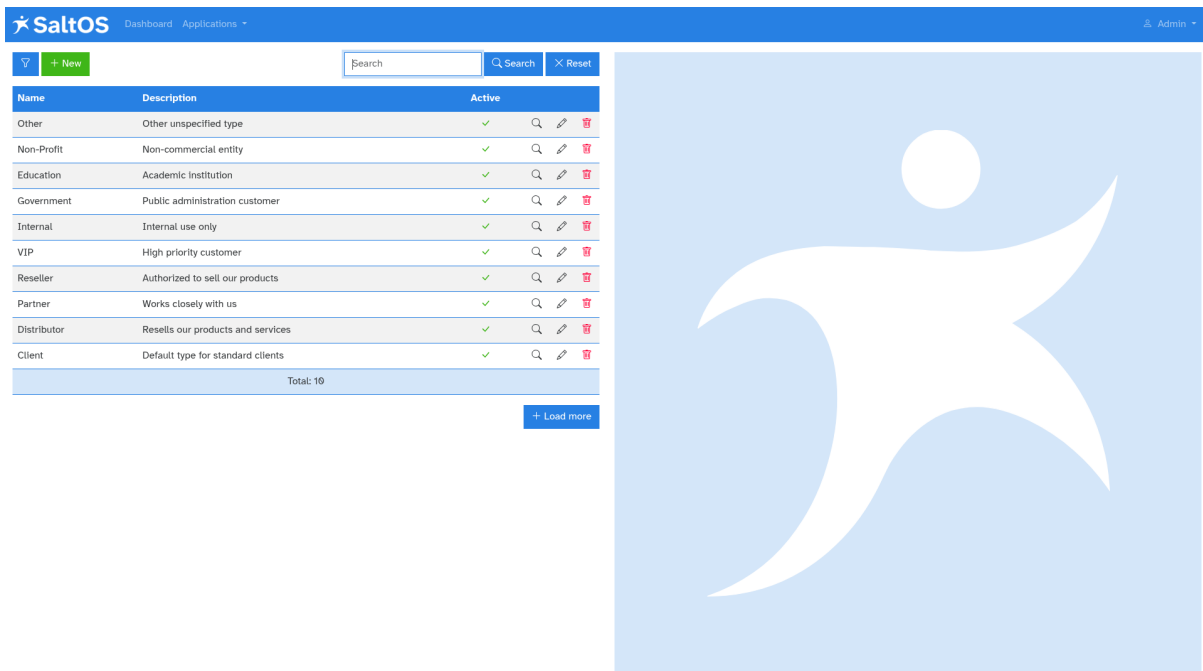


Customer Types

Description

The Customer Types application allows you to define categories or segments for classifying customers. These types are used in the Customers module to group and organize clients according to their profile, purpose, or treatment. Examples may include "Individual", "Company", "VIP", or "Distributor".

List view



| Name | Description | Active |
|-------------|-----------------------------------|--------|
| Other | Other unspecified type | ✓ |
| Non-Profit | Non-commercial entity | ✓ |
| Education | Academic institution | ✓ |
| Government | Public administration customer | ✓ |
| Internal | Internal use only | ✓ |
| VIP | High priority customer | ✓ |
| Reseller | Authorized to sell our products | ✓ |
| Partner | Works closely with us | ✓ |
| Distributor | Resells our products and services | ✓ |
| Client | Default type for standard clients | ✓ |
| Total: 10 | | |

The following fields are displayed in the list view:

- Name: The label of the customer type (e.g., Company, VIP).
- Description: Additional explanation of the type's purpose or scope.
- Active: Indicates whether the type is available for selection.

Form view

This view is used to create, view or edit customer type entries.

In **create** mode, the form is empty and ready to enter new data.

Dashboard Applications

Admin

+ New

Search

Reset

Active

| Name | Description | Active |
|-------------|-----------------------------------|---|
| Other | Other unspecified type | <div>✓</div> <div>🔍</div> <div>✎</div> <div>🗑</div> |
| Non-Profit | Non-commercial entity | <div>✓</div> <div>🔍</div> <div>✎</div> <div>🗑</div> |
| Education | Academic institution | <div>✓</div> <div>🔍</div> <div>✎</div> <div>🗑</div> |
| Government | Public administration customer | <div>✓</div> <div>🔍</div> <div>✎</div> <div>🗑</div> |
| Internal | Internal use only | <div>✓</div> <div>🔍</div> <div>✎</div> <div>🗑</div> |
| VIP | High priority customer | <div>✓</div> <div>🔍</div> <div>✎</div> <div>🗑</div> |
| Reseller | Authorized to sell our products | <div>✓</div> <div>🔍</div> <div>✎</div> <div>🗑</div> |
| Partner | Works closely with us | <div>✓</div> <div>🔍</div> <div>✎</div> <div>🗑</div> |
| Distributor | Resells our products and services | <div>✓</div> <div>🔍</div> <div>✎</div> <div>🗑</div> |
| Client | Default type for standard clients | <div>✓</div> <div>🔍</div> <div>✎</div> <div>🗑</div> |
| Total: 10 | | |

+ Load more

Name

Description

✓ Create

✕ Cancel

In **view** mode, the fields are filled with the selected record and cannot be edited.

Dashboard Applications

Admin

+ New

Search

Reset

Active

| Name | Description | Active |
|-------------|-----------------------------------|---|
| Other | Other unspecified type | <div>✓</div> <div>🔍</div> <div>✎</div> <div>🗑</div> |
| Non-Profit | Non-commercial entity | <div>✓</div> <div>🔍</div> <div>✎</div> <div>🗑</div> |
| Education | Academic institution | <div>✓</div> <div>🔍</div> <div>✎</div> <div>🗑</div> |
| Government | Public administration customer | <div>✓</div> <div>🔍</div> <div>✎</div> <div>🗑</div> |
| Internal | Internal use only | <div>✓</div> <div>🔍</div> <div>✎</div> <div>🗑</div> |
| VIP | High priority customer | <div>✓</div> <div>🔍</div> <div>✎</div> <div>🗑</div> |
| Reseller | Authorized to sell our products | <div>✓</div> <div>🔍</div> <div>✎</div> <div>🗑</div> |
| Partner | Works closely with us | <div>✓</div> <div>🔍</div> <div>✎</div> <div>🗑</div> |
| Distributor | Resells our products and services | <div>✓</div> <div>🔍</div> <div>✎</div> <div>🗑</div> |
| Client | Default type for standard clients | <div>✓</div> <div>🔍</div> <div>✎</div> <div>🗑</div> |
| Total: 10 | | |

+ Load more

Info

Other

Description

Other unspecified type

✎ Edit

🗑 Delete

✕ Close

In **edit** mode, the form is pre-filled and allows modifications.

Dashboard Applications

Admin

+ New

Search

Search

Reset

☒ Active

| Name | Description | Active | | | |
|-------------|-----------------------------------|--------|---|---|----|
| Other | Other unspecified type | ✓ | 🔍 | ✎ | 🗑️ |
| Non-Profit | Non-commercial entity | ✓ | 🔍 | ✎ | 🗑️ |
| Education | Academic institution | ✓ | 🔍 | ✎ | 🗑️ |
| Government | Public administration customer | ✓ | 🔍 | ✎ | 🗑️ |
| Internal | Internal use only | ✓ | 🔍 | ✎ | 🗑️ |
| VIP | High priority customer | ✓ | 🔍 | ✎ | 🗑️ |
| Reseller | Authorized to sell our products | ✓ | 🔍 | ✎ | 🗑️ |
| Partner | Works closely with us | ✓ | 🔍 | ✎ | 🗑️ |
| Distributor | Resells our products and services | ✓ | 🔍 | ✎ | 🗑️ |
| Client | Default type for standard clients | ✓ | 🔍 | ✎ | 🗑️ |
| Total: 10 | | | | | |

+ Load more

Name

Other

Description

Other unspecified type

✓ Save

✗ Cancel

The form includes the following fields:

- **Active:** Enables or disables the type for use in the Customers app.
- **Name:** Title of the customer type.
- **Description:** Optional note describing how or when to use this type.

Delete

Customer types can be deleted only if they are not assigned to any customer.

If in use, they should be deactivated instead to preserve consistency.