

# 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

SaltOS

Dashboard Applications

List - Customer Types

Admin

▼

+ New

🔍 Search

✕ Reset

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

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.

SaltOS

Dashboard Applications

New - Customer Types

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

Description

✓ Create

✕ Cancel

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

SaltOS

Dashboard Applications

Detail - Customer Types

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


Info

Edit

Delete


Close

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





[Dashboard](#)
[Applications](#)









































## Modify - Customer Types




+ New


 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

 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.