Create and use customer families

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Context

Customer families determine which industry templates are suggested.

Starting point

My customers → Edit customer families

Prerequisites

- Prepare the industry classification and the templates to associate.

Steps

1. Create categories

Click Edit customer families. In the window that opens, use + at the required level, enter the families and confirm. The hierarchy has at most three levels: family, subfamily and sub-subfamily.

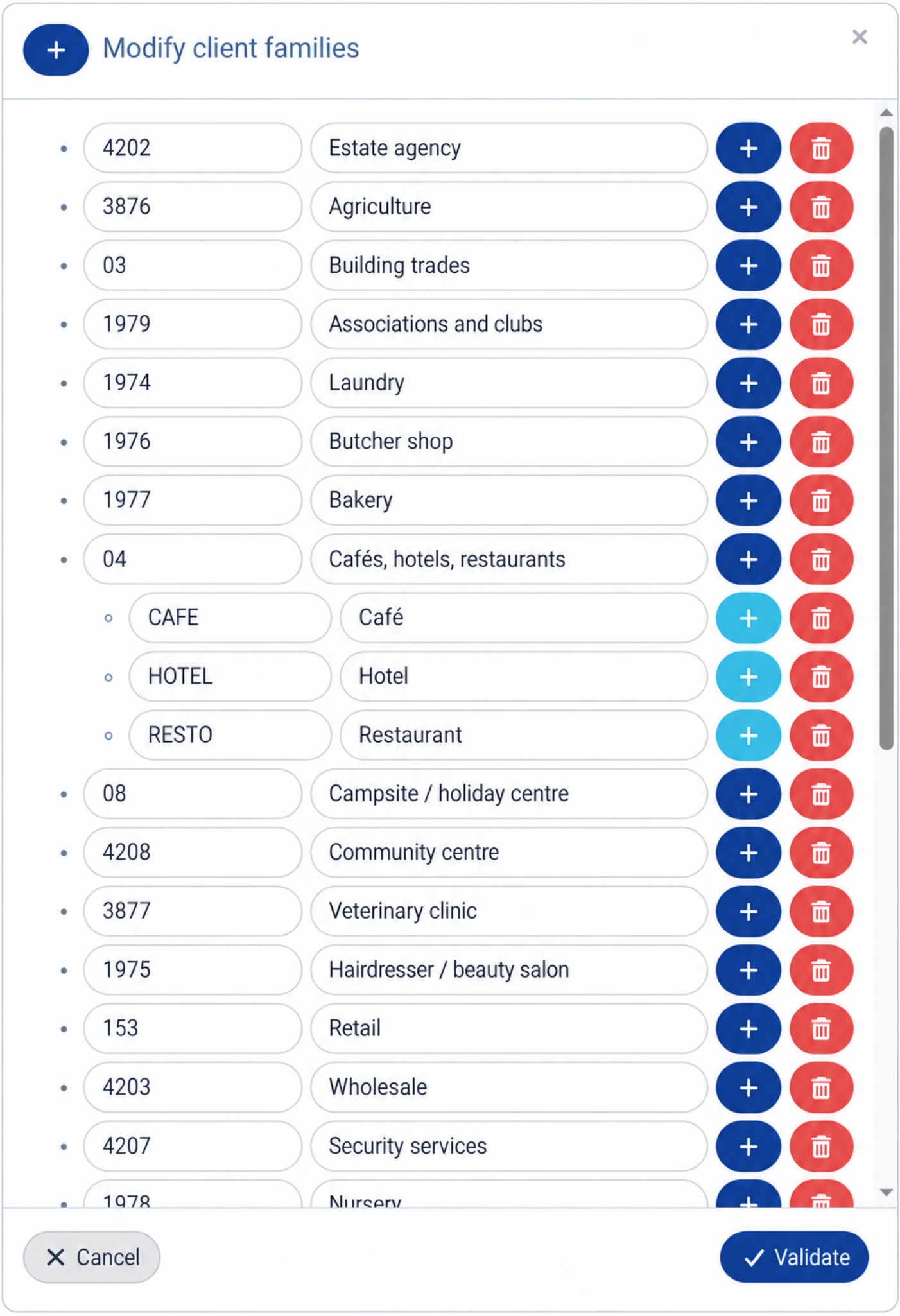
Expected result

The families are created and customers can be assigned to the classification.

Remember

- Then assign each customer to a family in their record. Templates associated with that family can be suggested. Contact support for another import format.

Illustrations


Modify client families
4202
Estate agency
3876
Agriculture
03
Building trades
1979
Associations and clubs
1974
Laundry
1976
Butcher shop
1977
Bakery
04
Cafés, hotels, restaurants
CAFE
Café
HOTEL
Hotel
RESTO
Restaurant
08
Campsite / holiday centre
4208
Community centre
3877
Veterinary clinic
1975
Hairdresser / beauty salon
153
Retail
4203
Wholesale
4207
Security services
1978
Nursery
Cancel
Validate

See also

- Create and complete a customer record
- Create a complete library plan

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