How to create a customer group and add customers in group ?

i. Go to Set-Up → Customer Groups

ii. Click on ‘Add Customer Group’ button from tool strip

iii. Enter Customer Group Name and Description (Description field is optional)

iv. Click on ‘Create (F8)’

v. To add customers in a group go to Set-Up → Customers. Click on ‘Edit Customer’ button from tool strip

vi. Enter the ‘Customer Group’ name and click on ‘Update (F8)’

vii. To update customer group for customers in bulk click on ‘Export Customer’ button from tool strip

viii. Select the path to save the excel file and click on ‘Save’

ix. In the excel there will be a column ‘CUSTOMERGROUP’. Add the customer group name there, save the excel and close it.

x. Click on ‘Upload Customers’ button from the tool strip. You will get a warning message to take database backup. It is recommended to take one backup before you proceed further.

xi. A window of ‘Customer Opening Balance Detail’ will be open, click on ‘OK’

xii. Select the excel file and click on ‘Start Import’

xiii. Once you get the import successful message click on ‘OK’ and close the ‘Import Data For Customers’ window