



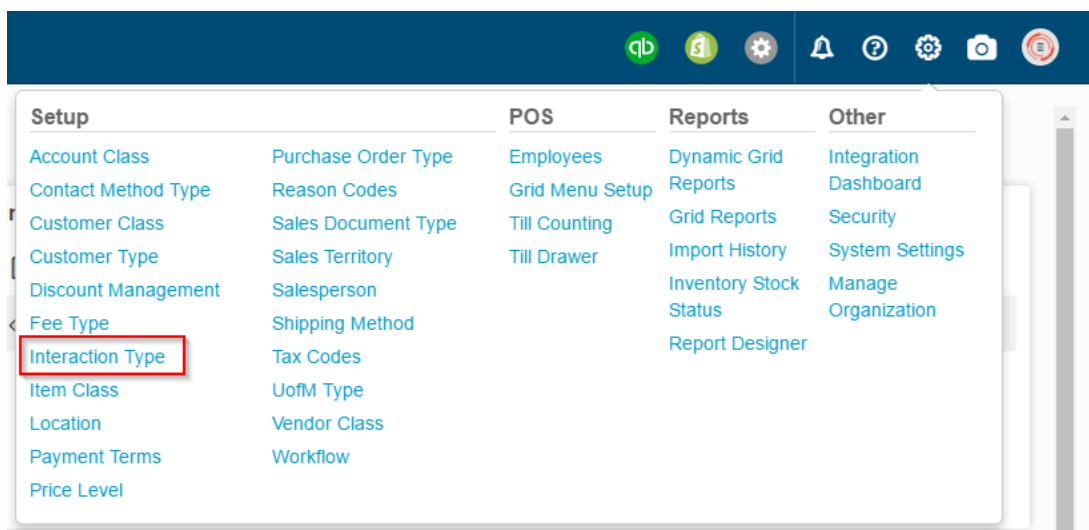
## Interaction Type

Megan De Freitas - 2025-06-10 - Settings

### Overview

Interaction Types allow you to define styles of communication between your company and customers, vendors, etc., and to easily reference any communications that occur.

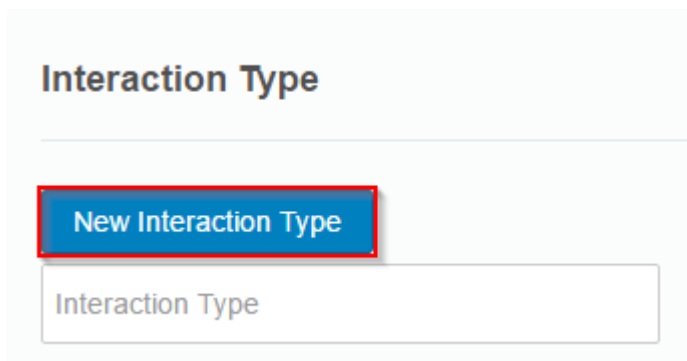
To get started, select **Interaction Type** from the Settings menu.



### Interaction Type

#### Create an Interaction Type

To create an Interaction Type, click the **New Interaction Type** button in the upper left-hand corner of the screen.



The Interaction Type drawer will appear.

## Interaction Type

 Feedback



Interaction Type

Description

Give your Interaction Type a name and description, and click **Save** when you've finished.

### Edit an Interaction Type

To edit an existing Interaction Type, first select the Interaction Type from the list on the left-hand side of the Interaction Type window.

### Interaction Type

Call - Outbound

Call- Inbound

Complaint

Delivery Notice

Inquiry-Web

Notice for Pickup

Notice to Pay

Once you've selected the Interaction Type you want to edit, make your changes in the information fields on the right-hand side of the screen.

Interaction Type

Description

Save

When you've finished making your changes, click **Save**.

**See it in Action**

Interaction Type dropdowns appear on the Interactions tabs on Customer cards, Vendor cards, Sales Documents, and Purchase Orders.

Create Interaction

Feedback

x

Interaction

▼

Subject

Notes

Details

▼

Starts On

Ends On

☐ All Day Event

Remind On

Interaction Type

No Interaction Type

▼

Assigned To

No Assigned To

▼

A record of past interactions appears on the Interactions tab of Customer cards, Vendor cards, sales documents, etc.

Sales Documents

Contacts

Item Sales

A/R

Interactions

Audits

Notes

New

Edit Line

Delete Lines

<div></div> Subject	Notes	Contact Person
<div></div> salesperson feedback	Received a call providing voluntary feedba...	Jack Mitchell