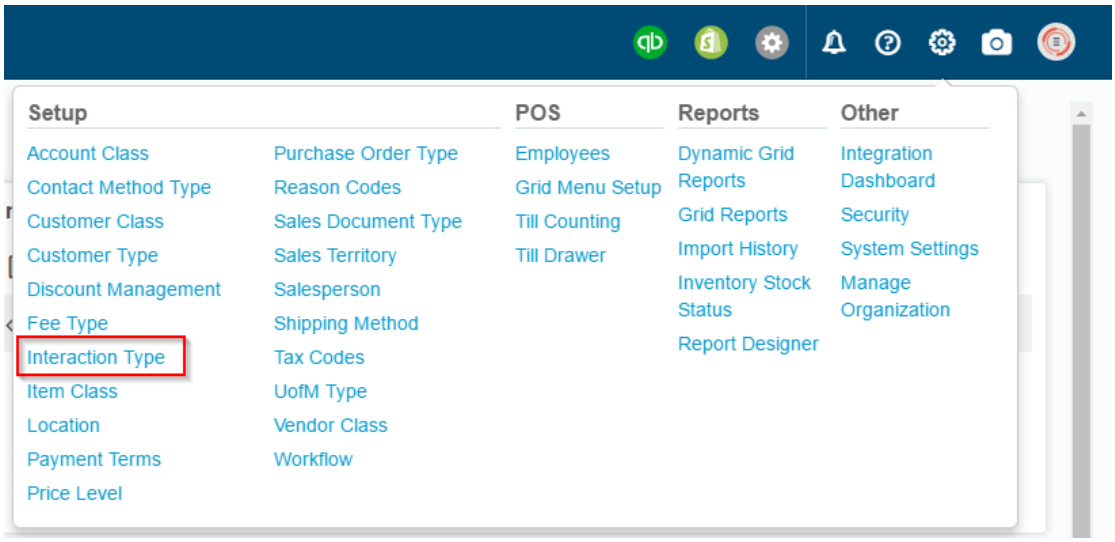
Interaction Type

Cavallo Support - 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.

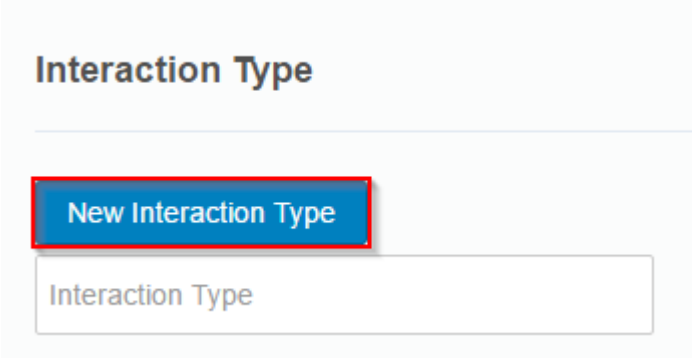
To get started, select **Interaction Type** from the Settings menu.



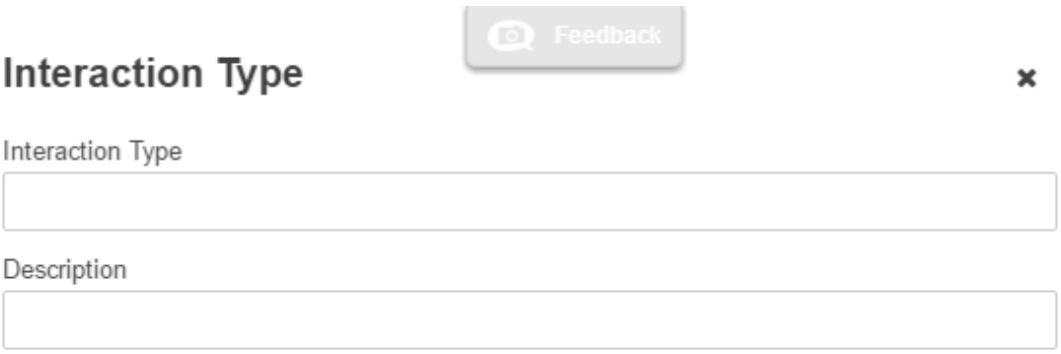
Interaction Type

Create an Interaction Type

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



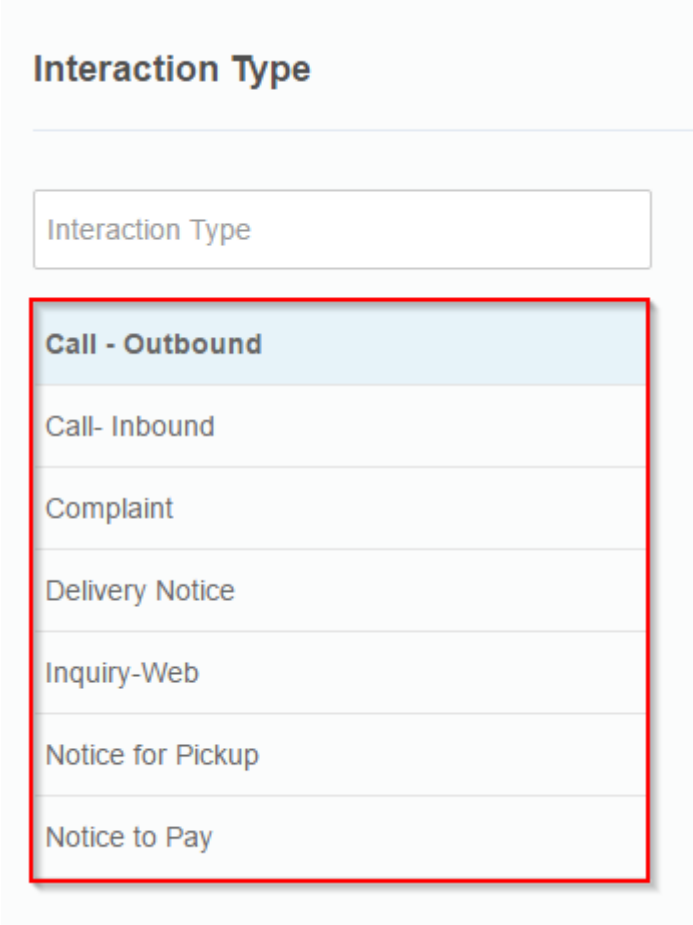
The Interaction Type drawer will appear.



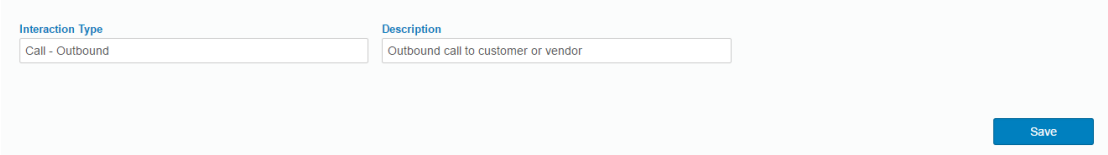
Give your Interaction Type a name and description, and click **Save** when you've finished.

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.



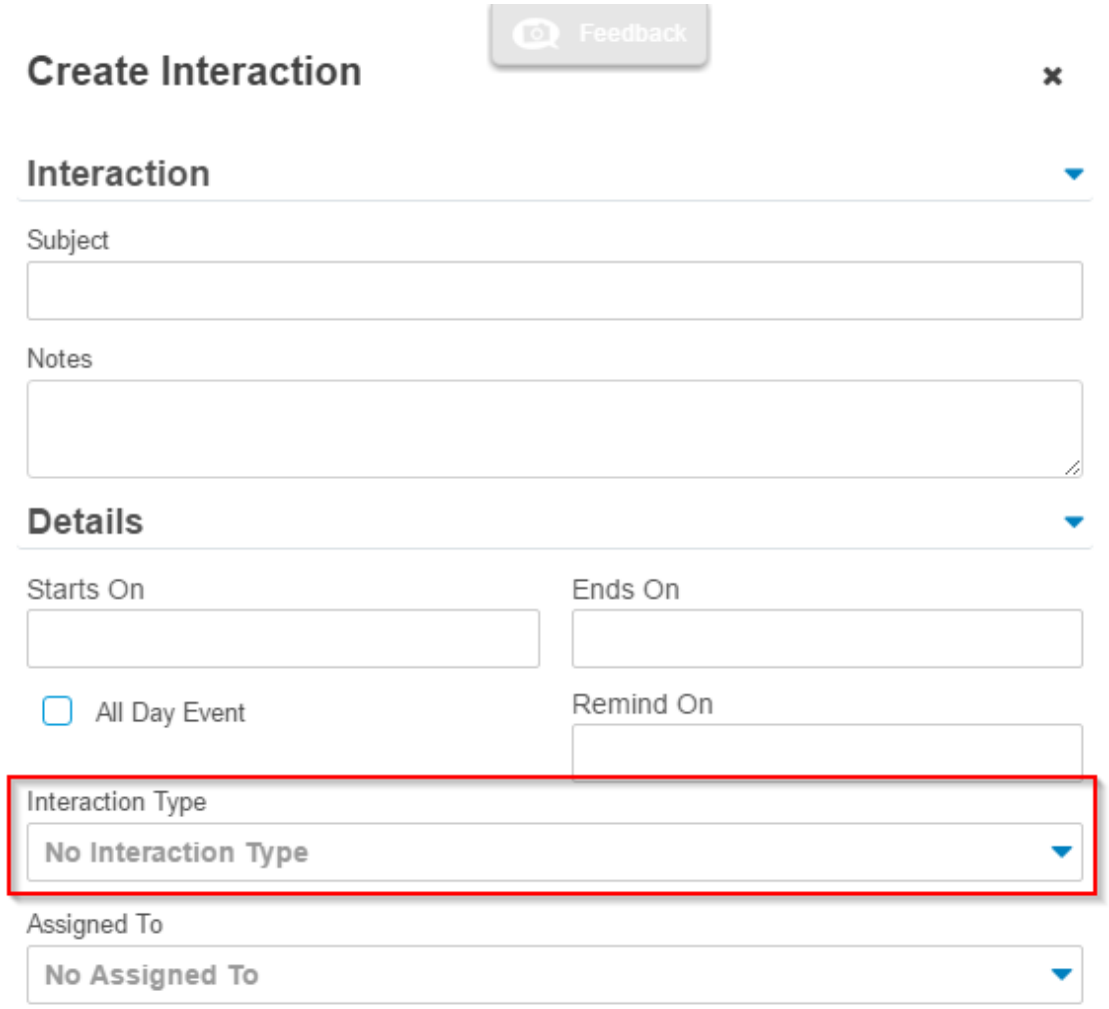
Once you've selected the Interaction Type you want to edit, make your changes in the information fields on the right-hand side of the screen.



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.



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

