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# 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.

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Setup		POS	Reports	Other	
Account Class Contact Method Type Customer Class Customer Type Discount Management Fee Type Interaction Type Item Class Location Payment Terms Price Level	Purchase Order Type Reason Codes Sales Document Type Sales Territory Salesperson Shipping Method Tax Codes UofM Type Vendor Class Workflow	Employees Grid Menu Setup Till Counting Till Drawer	Dynamic Grid Reports Grid Reports Import History Inventory Stock Status Report Designer	Integration Dashboard Security System Settings Manage Organization	

### Interaction Type

#### Create an Interaction Type

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

Interaction Type	
New Interaction Type	
Interaction Type	

The Interaction Type drawer will appear.

# 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 lefthand side of the Interaction Type window.

Interaction Type				
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
Call - Outbound	Outbound call to customer or vendor

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	G Feedback	×
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.

Sa	ales Documents	Contacts	Item Sa	ales A/R	Interactions	Audits	Notes	
	New	Edit Line		Delete Lines	2			
	Subject		•	Notes				Contact Person
	salesperson fe	edback		Received a	call providing v	oluntary fe	edba	Jack Mitchell