



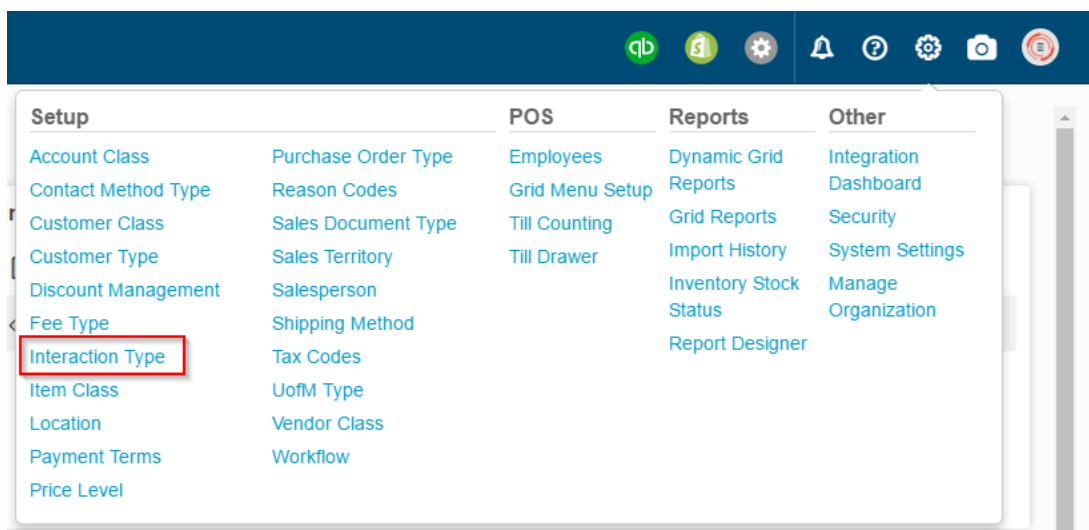
## Interaction Type

Megan De Freitas - 2024-12-02 - 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.



### Navigation Menu

- [Interaction Type](#)
  - [Create an Interaction Type](#)
  - [Edit an Interaction Type](#)
- [See it in Action](#)

### 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.

## Interaction Type

New Interaction Type

Interaction Type

The Interaction Type drawer will appear.

Feedback

## Interaction Type

Interaction Type

Description

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

[Back to Navigation Menu](#)

### 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

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

Call - Outbound

Description

Outbound call to customer or vendor

Save

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

[Back to Navigation Menu](#)

### 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

✕

### 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				
	Subject ▲	Notes				Contact Person	
	salesperson feedback	Received a call providing voluntary feedba...				Jack Mitchell	

[Back to Navigation Menu](#)