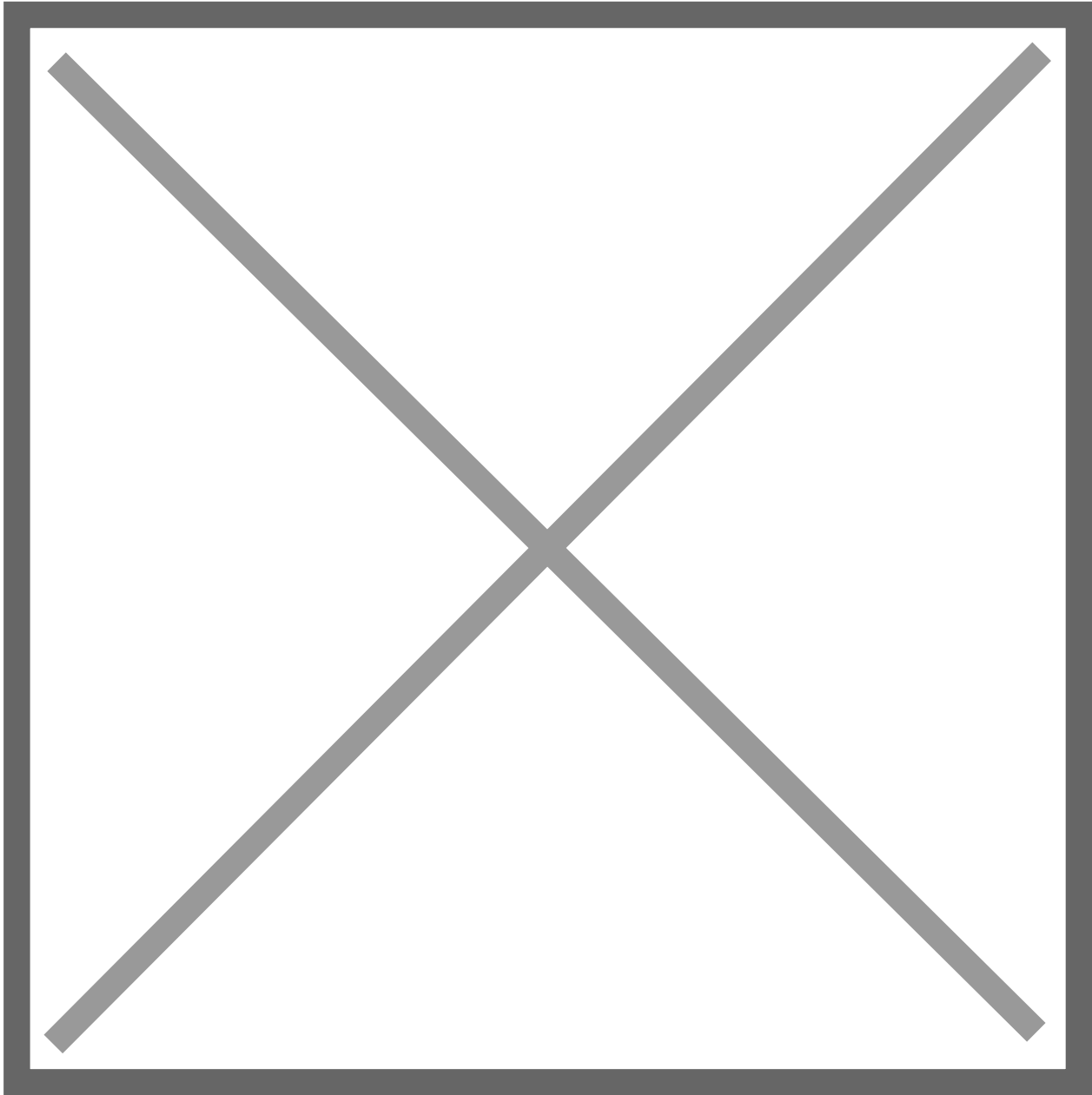


Debtor/Lead Interactions Help



This allows a user to interact with the customers.

Basic Tab – Search button

Debtor/Lead – search by debtor

Interaction Type – select interaction type from the drop down arrow

Date From – select the date from and the Date To, and search

Order By – select the order from the drop down arrow

Detailed Tab – searches the interaction details according to the Follow Up Date selection

Custom Fields – search by selecting the category from the drop down arrow.

Standard Tab

Insert button – to insert debtor’s interaction

Amend button – allows changes

Delete button – to delete the interaction

Send button – to send the interaction

Revision #1

Created 27 July 2023 18:03:20 by Paige

Updated 23 January 2024 08:18:51 by Paige