

Creditor Interactions

Creditors >Reports > Report List

This report shows all notes captured against creditors. A single Creditor can be selected to view all notes captured.

Creditor Interactions

Creditor From:

Creditor To:

Date From:

2023-04-01

Date To:

2023-04-30

Interaction:

Completed:

Sort By:

Date

Generate

Close

Creditor From / Creditors To	Select a Suppliers/Creditors you wish to view the report from. Select the Suppliers/Creditors you wish to see up to in the report.
Date From / Date To	Choose the date range for which you want to view the report from / Select a date range of when you want to see up to on the report.
Interaction Type	Select the interaction type from the drop-down arrow
Show complete	Allow the user to tick the box in order to see completed interactions on the report
Sort By	Choose from the drop-down menu how you would like your report sorted, your options are by date, Captured By or Subject

Generate button

Click the "Generate" button to open the report. You will have options to copy, email, or print the report. To view the report in an Excel document, copy the report and paste it into an Excel file.

Revision #5
Created 18 May 2023 21:48:17 by Paige
Updated 10 December 2024 03:58:54 by Pamela