

Debtor Interactions

CRM> Reports> Report List

This report shows all the interactions with Debtors, Prospects or opportunities. This report can be grouped by Debtor, Contact person or interaction type as well as Interaction Status.

Debtor Interactions

Debtor Type:

All

Debtor From:

Debtor To:

Date From:

2023-04-01

-

Date To:

2023-04-30

+

Interaction Type:

All

Interaction Status:

All

Group By:

Debtor

Sort By:

Captured Date Time

Generate

Close

This is a report on the interaction between the user and the customers
To run the report, select from the following fields:

Debtor Type	select the debtor's type from the drop down arrow
Debtor From	select the debtor from or leave it blank
Debtor To	select the debtor to or leave it blank
Date From	select the date from which the report will run from.
Date To	select the date to which the report will run from.
Interaction Type	select the interaction type from the drop down arrow
Interaction Status	select the interaction status from the drop down arrow

Group By	group the report by selection either a debtor or contact person or interaction
Sort By	sort the report by selecting one option from the drop down arrow

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