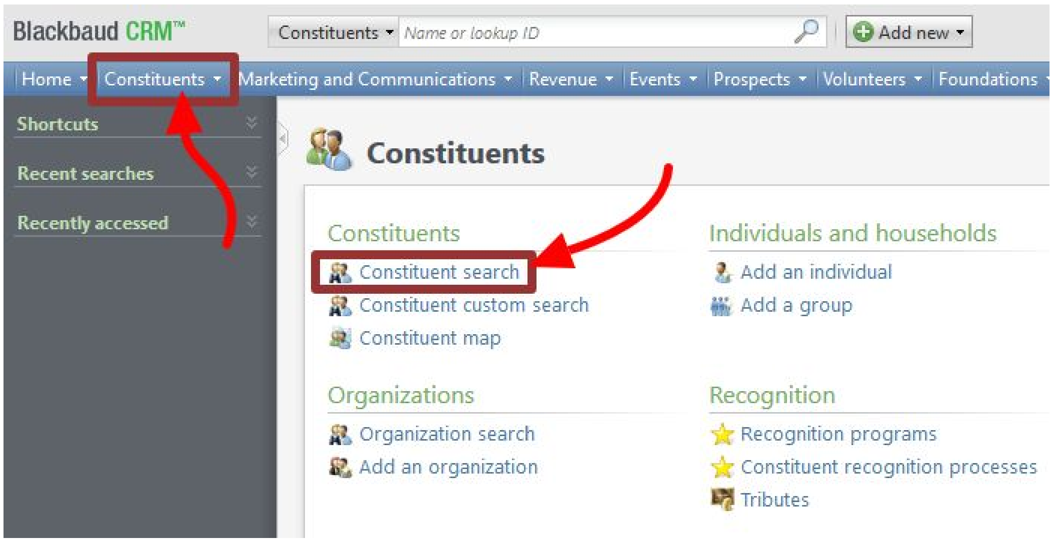
How to Add a Completed Interaction

An **interaction** in GAIL is a record of a more one-on-one, personal correspondence between a constituent and representative of the university (as opposed to a mass communication effort). This guide shows how to add an interaction that has already happened to a constituent's profile.

To add an **interaction**:

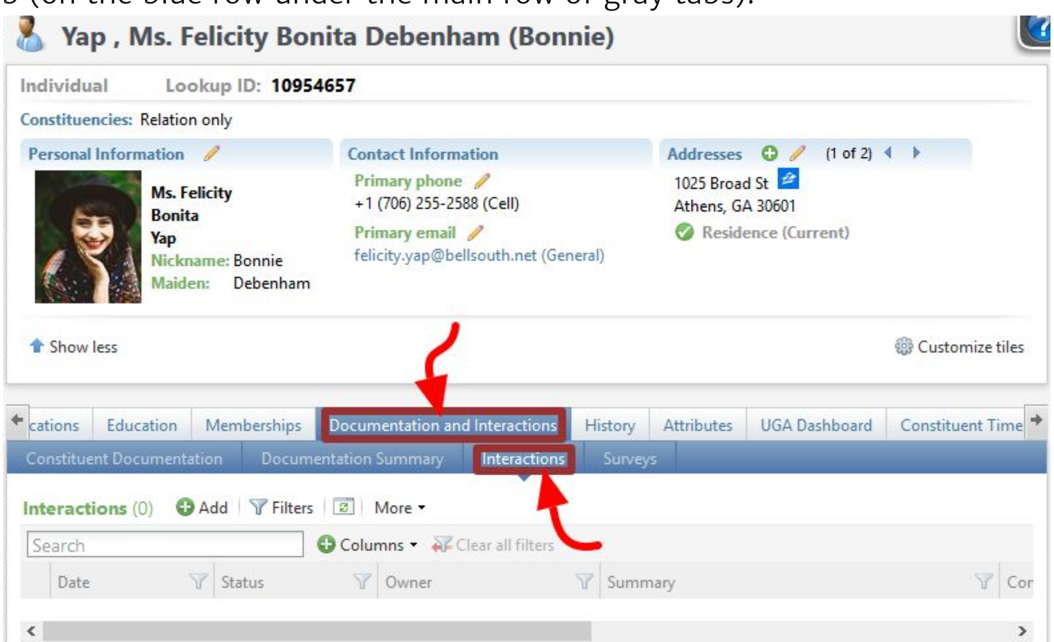
Step 1

Perform a **constituent search** for the individual who was the recipient of the interaction (the person you contacted) and click into their **constituent profile**.



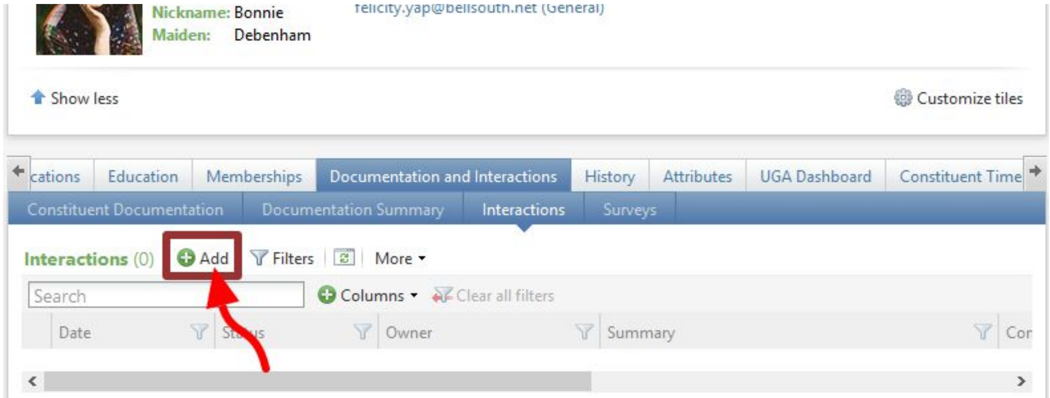
Step 2

In their profile, click on the **document and interactions** tab and then click on the **interactions** sub-tab (on the blue row under the main row of gray tabs).

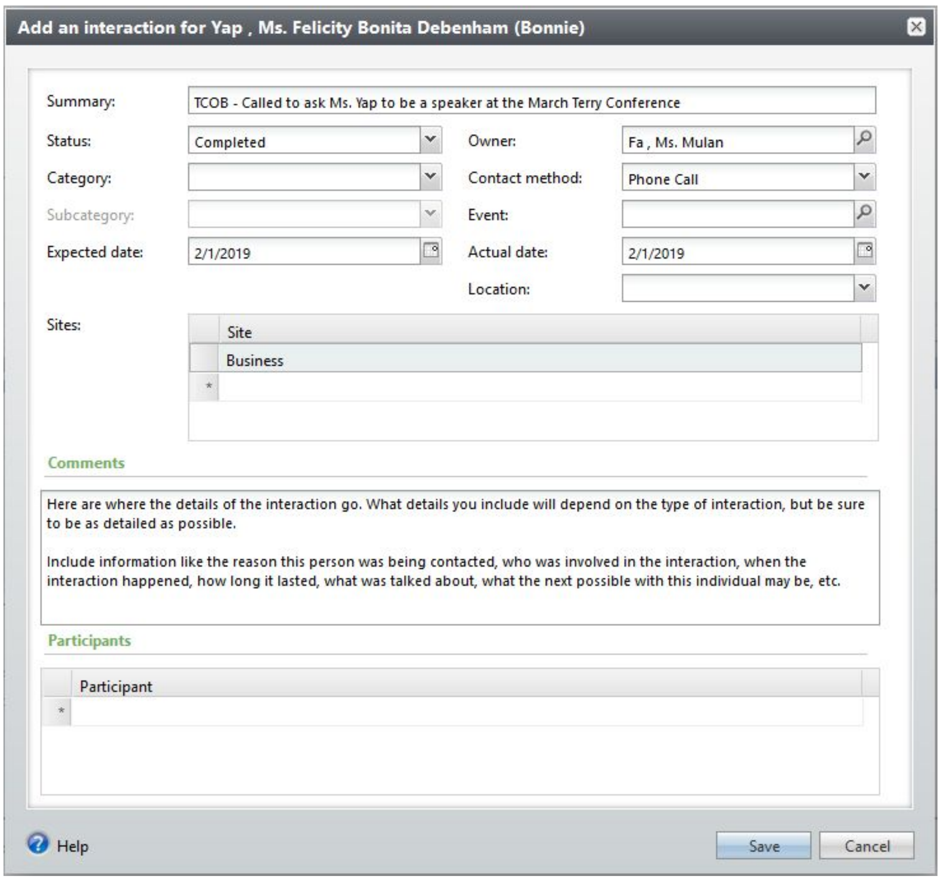


Step 3

Next to the sub heading ***interactions*** click the **add** button.



In the add an interaction dialog box, fill in the following information:



summary — summary should start with your department's naming convention followed by a brief one sentence overview of what the interaction was about

- Example: "TCOB – Called to ask Ms. Yap to be a speaker at March Terry Conference"

status — choose **completed** as the interaction has already happened

owner — this will be the person who conducted the interaction

- For example, who actually made the phone call, who wrote and sent the letter, etc.

contact method — from the drop-down choose how the constituent was contacted (detailed information about method types can be found here)

actual date — when the interaction actually happened

expected date — this the same as the actual date

site — which department the owner of the interaction works for

comments — here provide all relevant, detailed information about the interaction

Step 4

Once you've entered all information in the dialog box, hit **save**.