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**.