



From [Constituent View](#) go to the *Documentation and Interactions* Tab and then go to the Interactions sub-tab. From here you can see previously added interactions. To add another, select **“Add” in the Action Bar. This will bring up a box to assist you in adding necessary information.**

Notifications: ". Click here for more information.

Individual Lookup ID: [Redacted]

Constituencies: Not Contactable For Solicitation Philanthropic Fund Holder Committee member Has revenue Managed Constituent Event registra

Show more

Primary team member: Rollover node code: WTG Campaign participation in: Annual/2018/2018 Giving As:

Occupation: Medical/Medicine/Social Worker Is retired: No Manual Sort Name: [Redacted]

Summary Contact Personal Info Relationships Revenue Fundraise **Documentation and Interactions** Communications History

Documentation Summary Constituent Documentation **Interactions** Surveys

Interactions (5) **+ Add** Filters More

Sites: All sites Contact method: Start date: mm/dd/yyyy

Status: Date: All End date: mm/dd/yyyy Apply

Date	Start ti...	E...	T...	Status	Owner	Summary	Contact metho
9/5/2017	2:30 PM	3...	(...	Completed	Rabbi Debbie Pine	meeting with Debbie and Lauren regarding di...	Face to face
9/18/2017				Completed	Mrs. Melinda G. Michel	Mailed hand written Rosh Hashanah Card	Mail
11/10/2015				Completed	Mrs. Lauren Klein	Family Philanthropy Program	Email
4/4/2014				Pending	Mrs. Lauren Klein	Customized Proposal Follow-up	Email
3/19/2014				Completed	Mrs. Lauren Klein	Customized Proposal	Email

Refer to the screenshot below as a guide to help you enter your interaction.

- Yellow Fields are required.
- Use the drop downs whenever possible
- F3 enters today's date
- Selecting "other" in the location drop down allows you to enter a place, i.e. Starbucks, 101 W....., etc.
- Enter comments as necessary

Edit interaction for Mrs. Dara Schnee
✕

Summary:	Mailed hand written Rosh Hashanah Card		
Status:	Completed ▼	Owner:	Mrs. Melinda G. Michel 🔍
Category:	Development ▼	Contact method:	Mail ▼
Subcategory:	Stewardship ▼	Event:	<input type="text"/> 🔍
Expected date:	9/18/2017 📅	Actual date:	9/18/2017 📅
Expected start time:	<input type="text"/> hh:mm AM	Actual start time:	<input type="text"/> hh:mm AM
Expected end time:	<input type="text"/> hh:mm AM	Actual end time:	<input type="text"/> hh:mm AM
Time zone:	<input type="text"/> ▼	Location:	<input type="text"/> ▼

Sites:

	Site
*	

Comments

Use this space to add any additional information...

Participants

	Participant
*	<div style="border: 1px solid gray; padding: 2px; font-size: small; color: gray;"> Add other participants here. This will put the interaction on their account </div>

Help

Save
Cancel