2015 Training Module 06

Interactions

Version: May 15

Contents

Introduction

Interactions enable users to record details of the work they do with local organisations and volunteers. Interaction categories are unique to each local TSI, meaning they can be used to report on the work of the TSI at regular intervals.

Interactions in the new Milo system have been revamped to provide a more streamlined system than the old structure of Episodes and Interactions on the original system.

While it is possible to view historic interactions, together with the old subcategory, interactions from June 2015 will be recorded using the new interaction field.

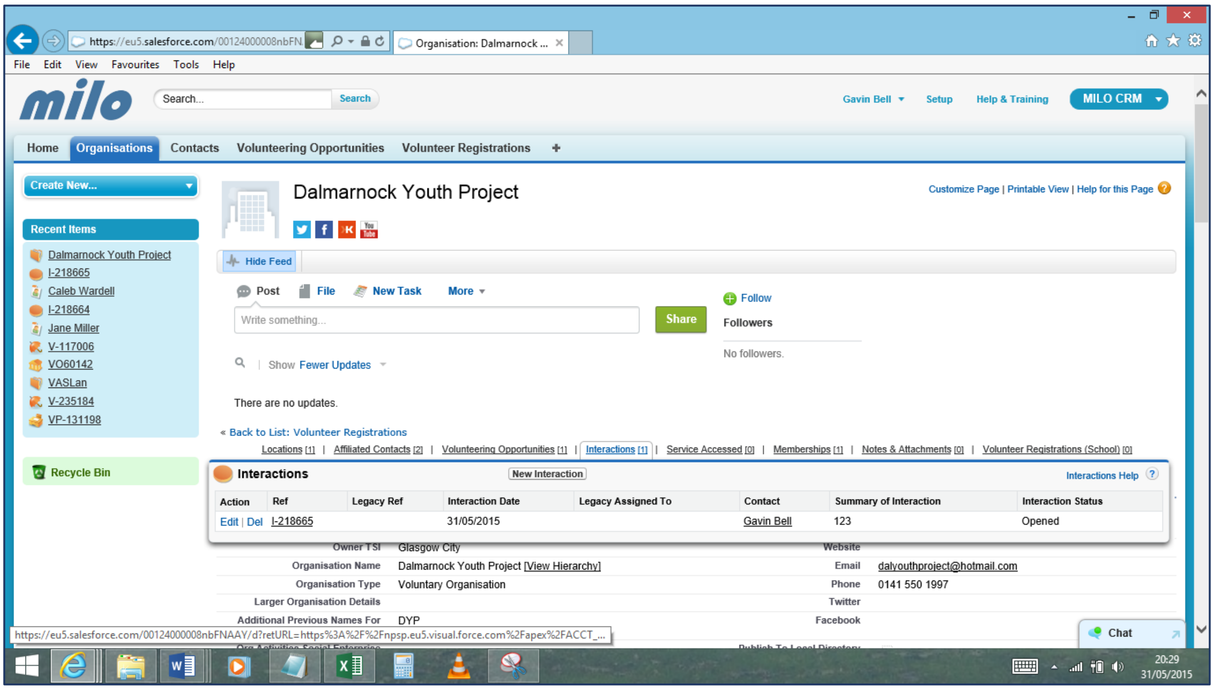
Managing Interactions in Milo

One difference of interactions to other objects on the system is you will normally want to view and add interactions as they relate to a particular organisation or contact.

Navigate to an interaction with an organisation

Click on the Organisations tab and navigate to the organisation you are interested in, either by using the global search or a view. Click into the Organisation view. To see if there are any interactions, either scroll to the bottom of the page to view associated entities, or look at over the Interactions link at the top of the page. If the number in brackets is not 0, there are associated interactions.

Hover over the link to see the main details of the organisation interaction:



Important: there are <u>two</u> clickable links on each record in the list results. The reference number (Ref) and the name of the contact at the organisation (Contact). You access the volunteer registration by clicking on the **Ref** number (highlighted below). Clicking on Contact will take you to the contact record itself.

Ref	Legacy Ref	Interaction Date	Legacy Assigned To	Contact
I-218665		31/05/2015		Gavin Bell

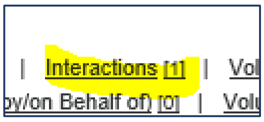
So to view the interaction record, simply click on the reference number.

Navigate to an interaction with a contact (including volunteers)

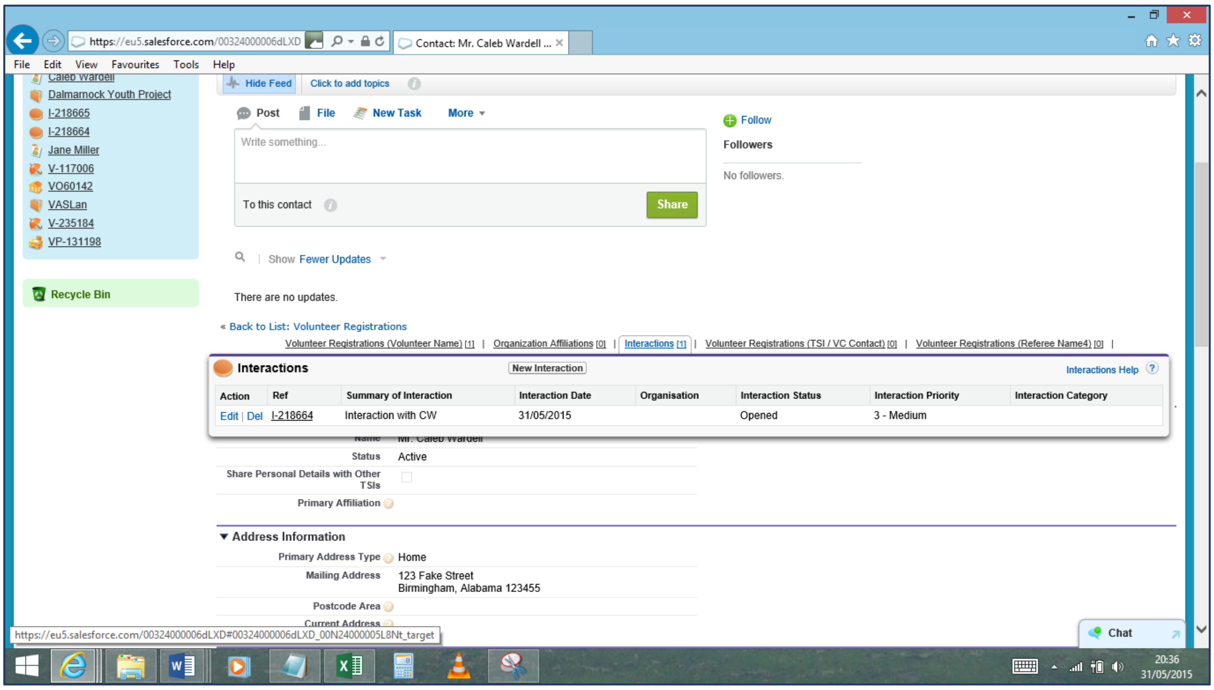
Click on the Contact tab and navigate to the contact you are interested in, either by using the global search or a view.

Click into the Contact view. To see if there are any interactions, either scroll to the bottom of the page to view associated entities, or look at over the Interactions link at the top of the page. If the number in brackets is not 0, there are associated interactions.

n.b. whether you are looking for an interaction with an individual contact not representing an organisation or a volunteer, the interaction will always be with the contact record, not the volunteer registration. If you wish to view interactions with a volunteer, click on Contact Name within the volunteer registration to go to the contact record.



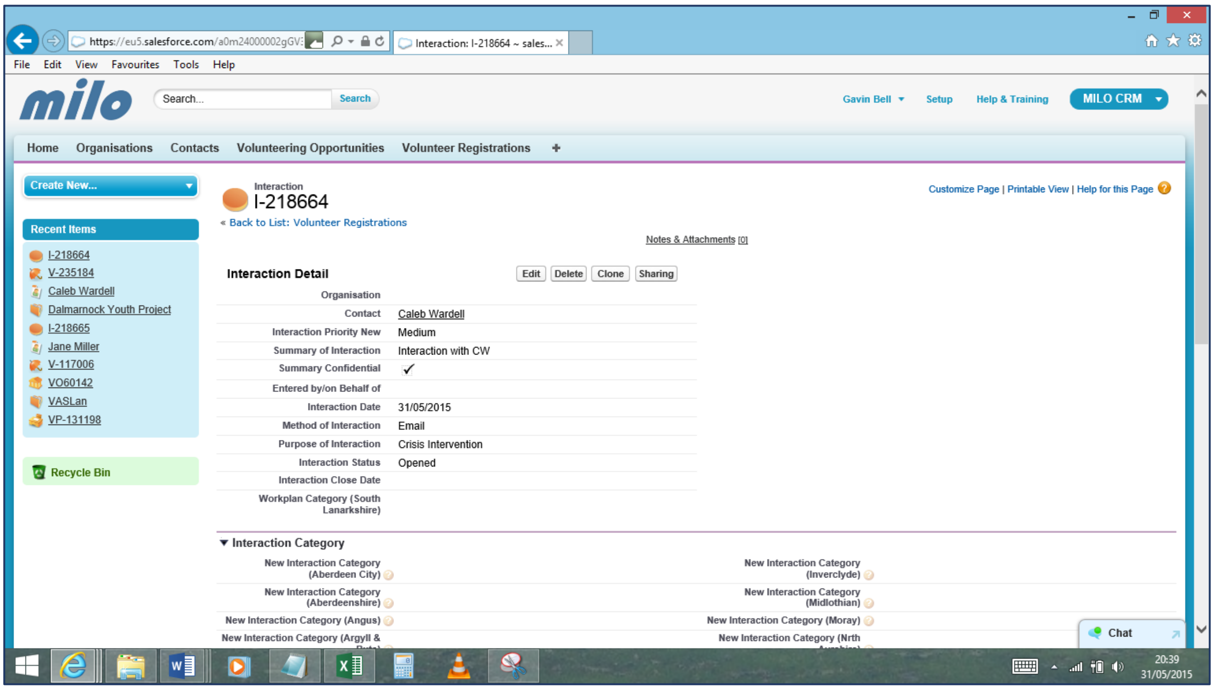
Hover over the link to see the main details of the contact interaction:



View and edit an interaction

When you click into an interaction record (remember to click on the ref number!), you will see the interaction view screen. As in the old system, data in each record is organised into a number of sections. Scroll down to see the data held on a interaction, broken down into:

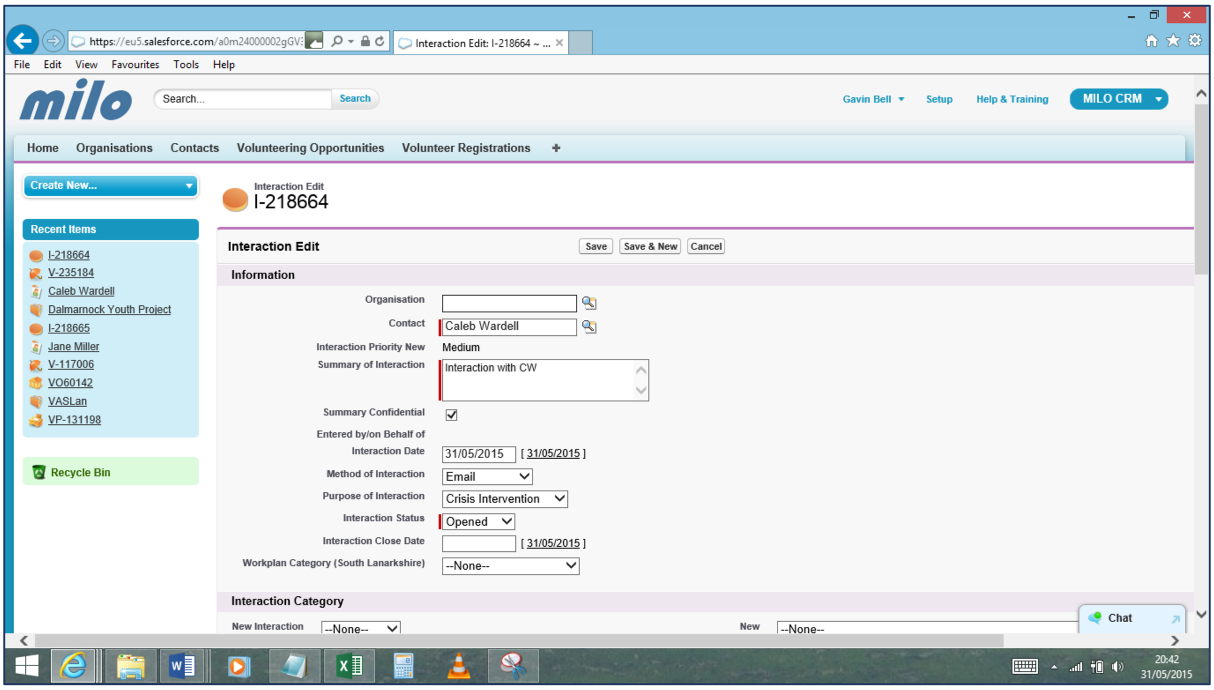
- Interaction details
- Interaction category
- Legacy interaction fields (for reference)



Because an interaction can only ever be associated with a single contact or one organisation, the only associated entity displayed at the top and bottom of the screen is Notes and Attachments, in case you need to attach a document associated with this interaction.

To make changes to an interaction, click on the **Edit** button at the top of the screen.

The page will open in edit view, allowing you to update and change any data on the interaction, if you have permission to do so.

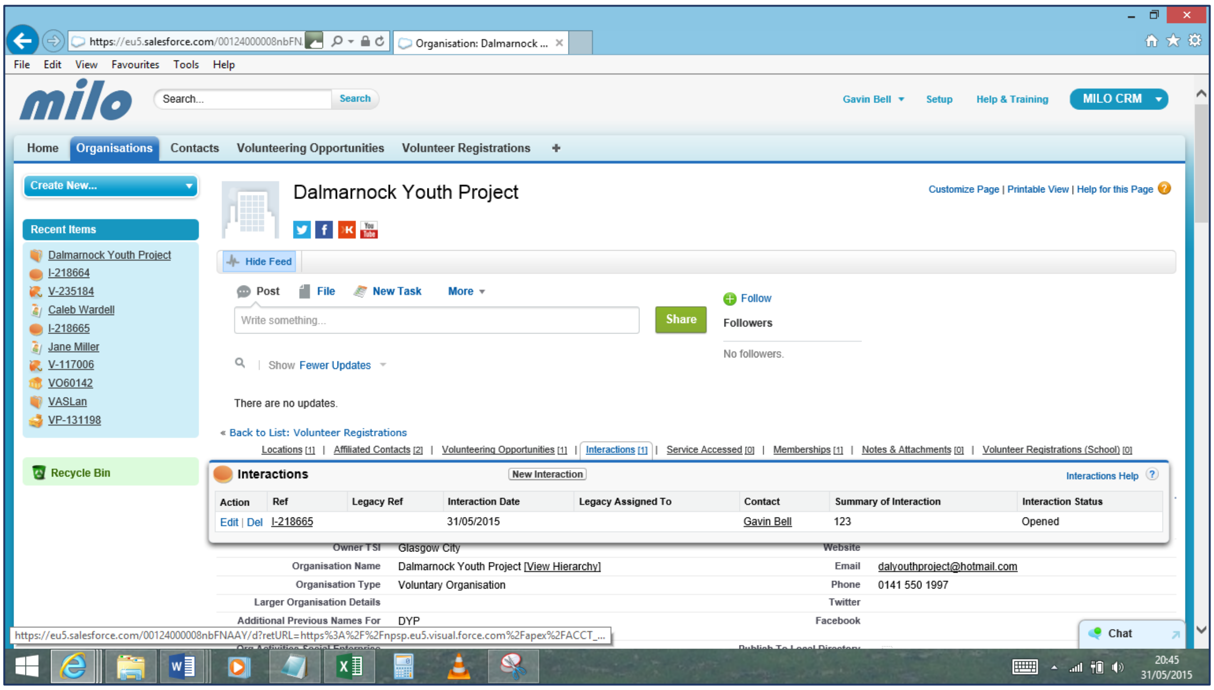


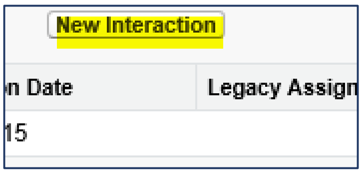
Create a new interaction

Another difference in interactions is you cannot create them from the **Create New…** button.

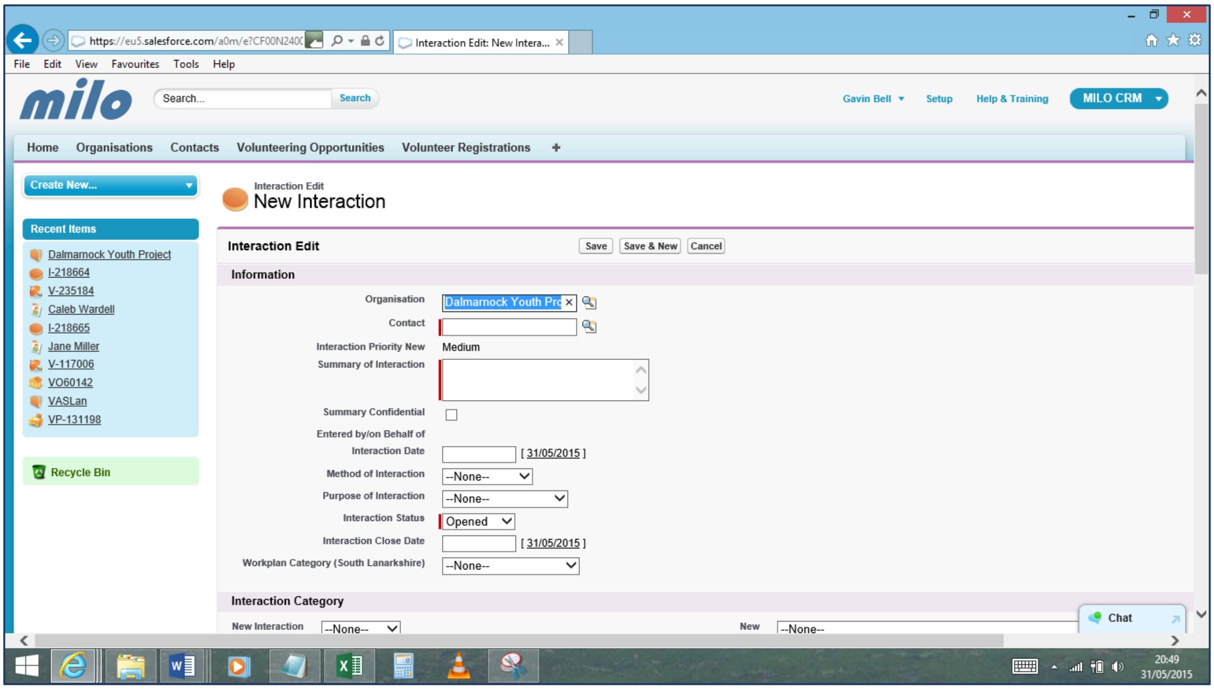
Instead, click into an Organisation record (if you want to record a new interaction with an individual contact, click into Contacts – the steps after that are all the same).

To create a new interaction, hover over the Interactions link at the top. This time, click on New Interaction.





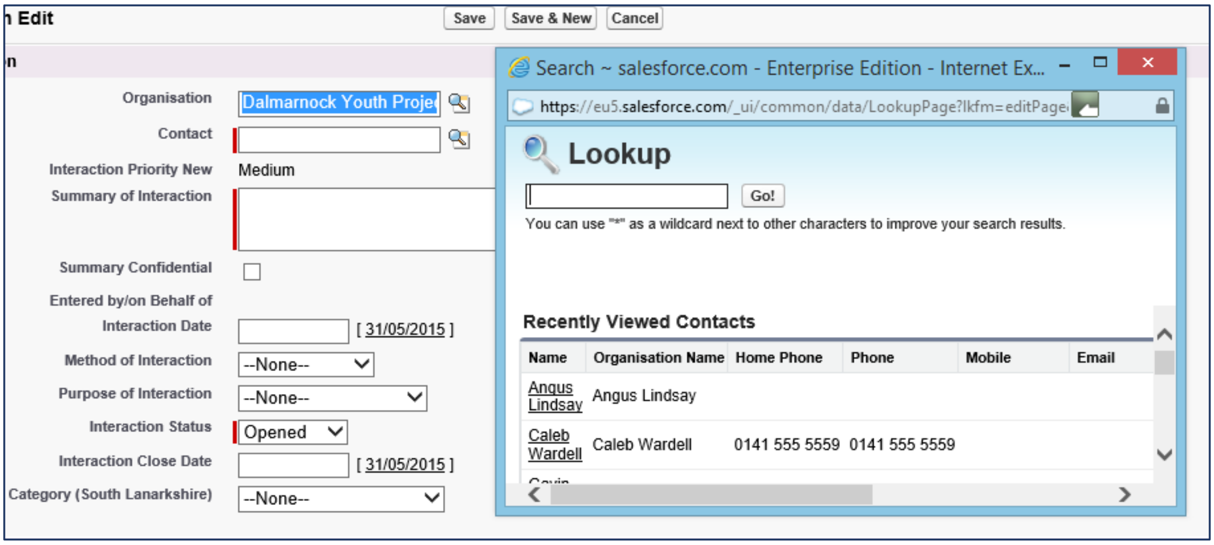
A new interaction input page will appear. This looks the same as the edit screen, but is blank to allow you to input a new interaction.



As in the previous system, some fields in each record type are mandatory. These are signified by a red bar next to the mandatory fields. You cannot save until all of these fields have been completed. As you can see, a contact is always mandatory, but an organisation is optional, as not all interactions will be related to an organisation.

Because this interaction has been created from an organisation record, the organisation is already filled in.

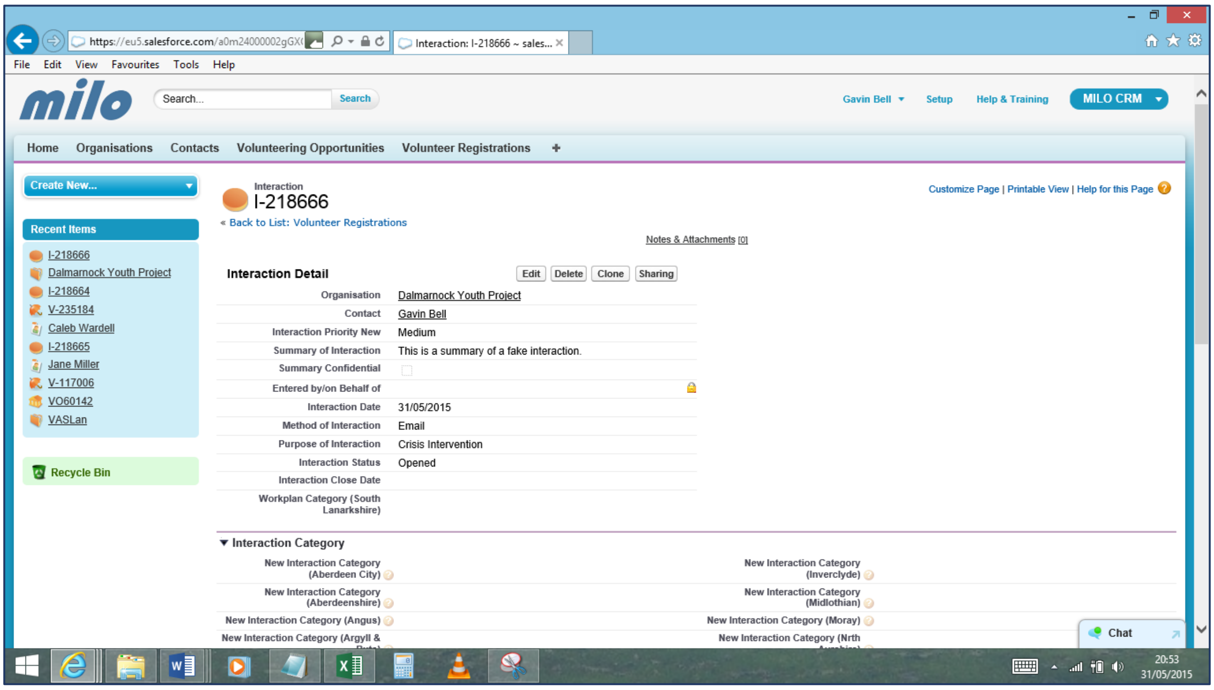
To select a contact for the interaction, click on the magnifying glass next to the Contact field.



You can select from recently-viewed contacts, or search for another contact record. Click on the name to add the contact to the interaction.

Remember to select a value for the New Interaction Category specific to your TSI (e.g. New Interaction Category – South Lanarkshire).

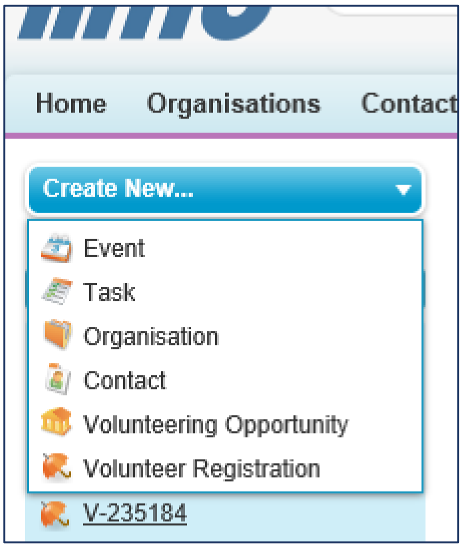
Once you have added the mandatory fields plus any other information, click **Save**. You will then see the view interaction screen as before:



To create a new interaction with a contact, repeat the steps above, but starting from a contact record rather than an organisation record.

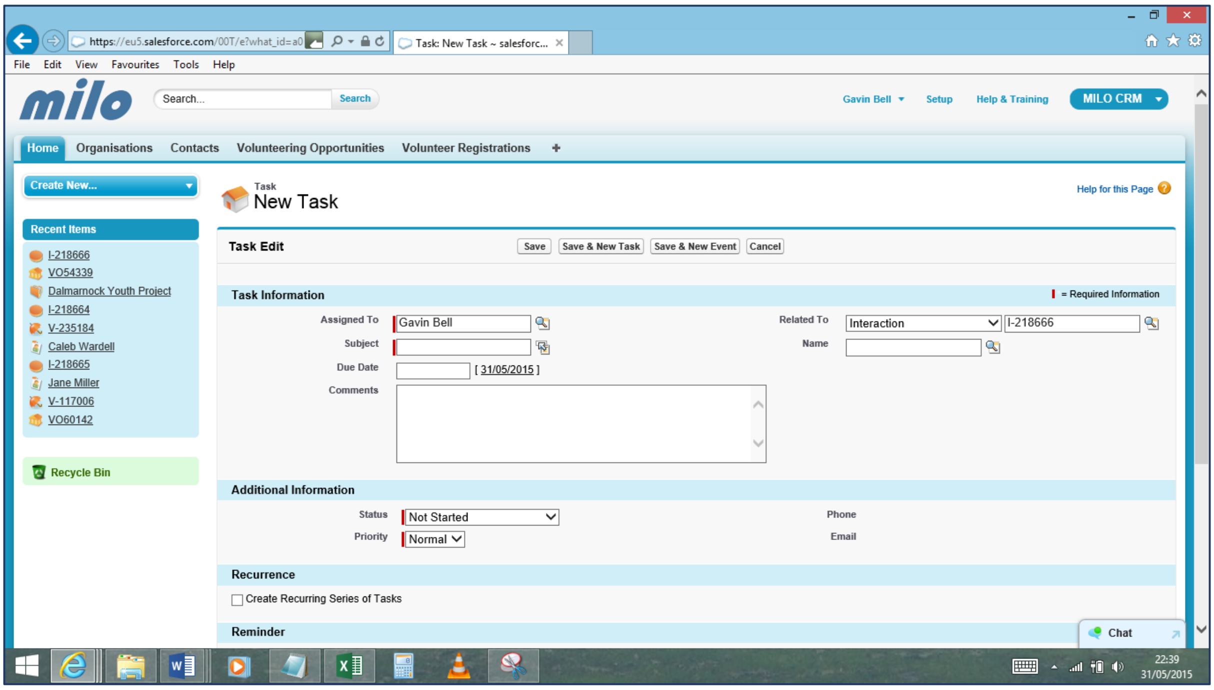
Assigning a task from an interaction

Tasks replace the old 'Interaction Action' function on the original Milo system. This is a built-in Salesforce feature, accessed via the **Create New…** button.



While in the view page for an interaction, select 'Task' from the Create New… menu.

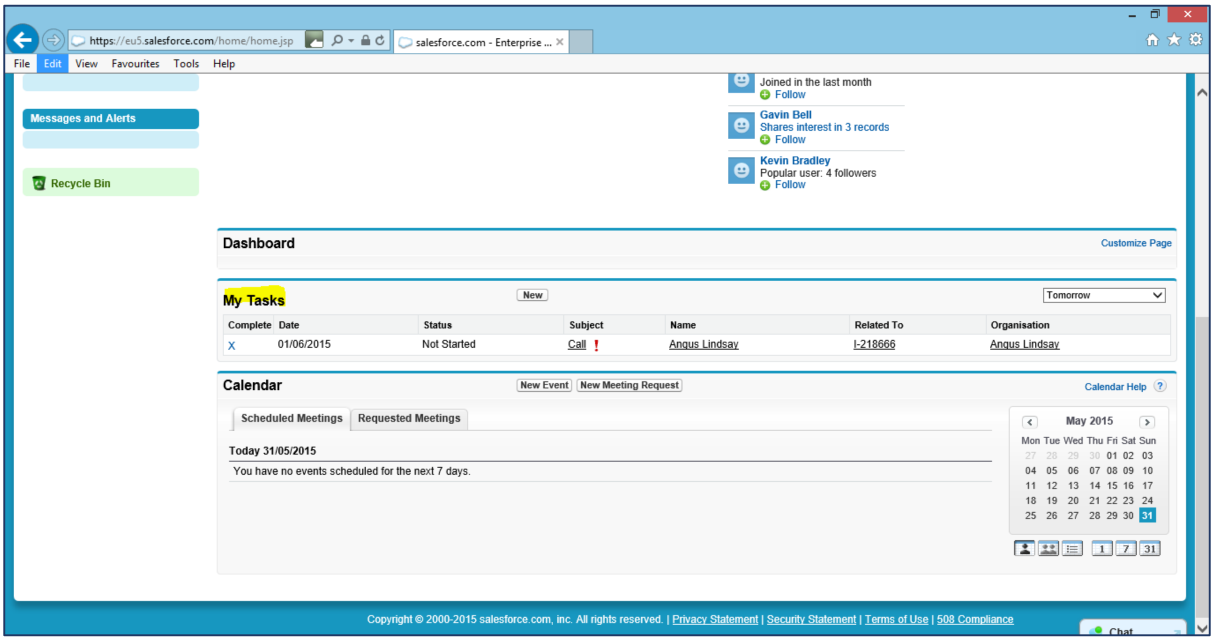
This will open up a new task related with the interaction.



Because you clicked to create from the interaction, the new task edit screen is pre-populated as related to that specific interaction, and assigned to you, the user. You can amend this to assign the task to another contact, as on the old system.

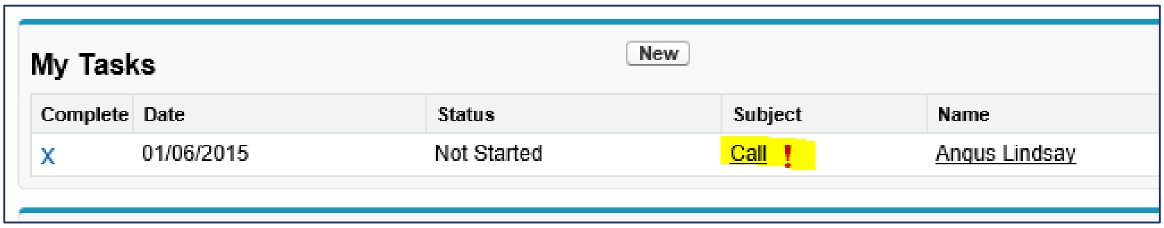
Complete the relevant details to assign a task to yourself or someone else related to this interaction (e.g. make a followup call), and click Save.

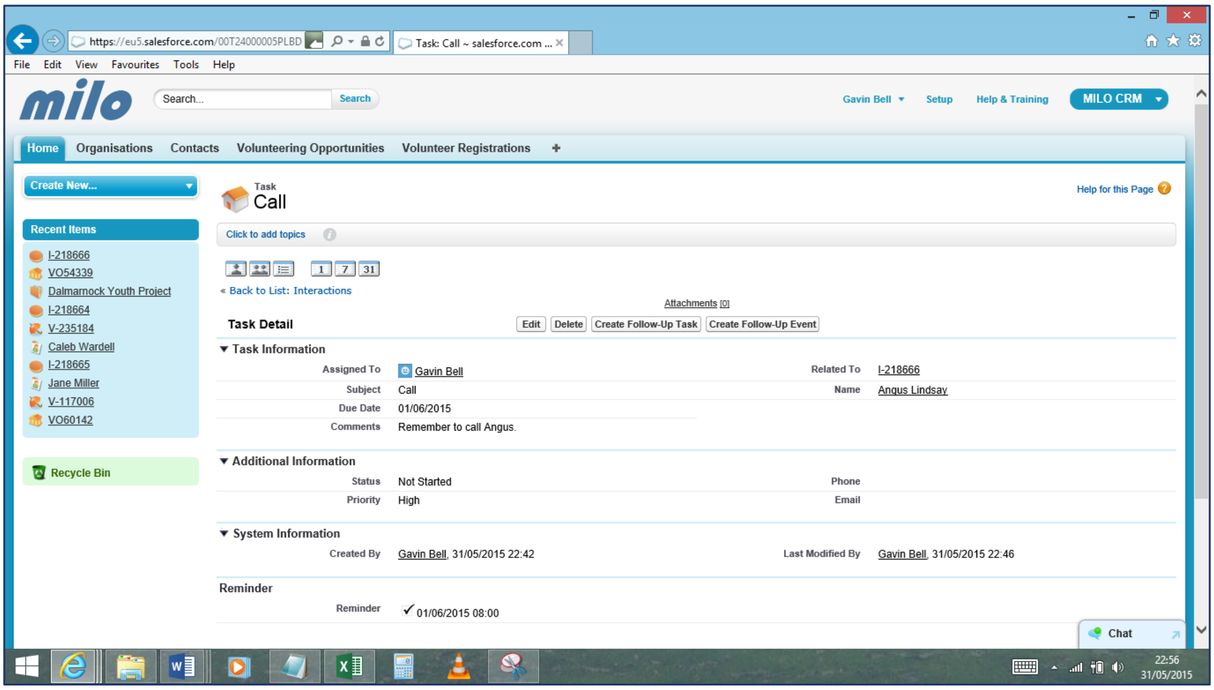
The task will now appear on the assigned user's home screen under My Tasks. To view the task, click on the Home tab and scroll down to see My Tasks:



You can use the dropdown on the right hand side of the screen to show all open tasks, or just those due in the next few days. If you have left the 'Reminder' option ticked, the user will get a reminder when you choose.

To view an existing task, click on the action type under 'Subject' to open up the Task view:





Summary

In the **Interactions** module, we have covered:

- Navigate to an interaction with an organisation
- Navigate to an interaction with an organisation
- View/edit interactions
- Create a new interaction
- Create a task related to an interaction

These skills are transferrable across the other Milo objects (Organisations, Volunteering Registrations etc.). You can use the same techniques to navigate around Milo and start to explore the other features Milo has to offer.

Remember – for more step by step advice, see the individual training modules. If you have any problems or get stuck, you can contact the Milo team at milosupport@scvo.org.uk