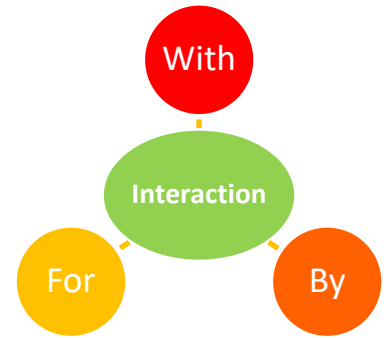


# Interactions

**DevMan** allows you to record important interactions with your stakeholders and link them to the approach, project or bursary. This can be done within DevMan, or directly from your email application by simply Bcc'ing your DevMan system.

Management dashboards/reports can be produced for specific time periods and/or users.



## Interaction defined

The interaction page has several fields that enables you to record key information relating to each engagement:

- Description:** A brief description of the activity
- Date:** Interaction date
- With:** Person/s communicated with
- By:** Person/s initiating the interaction
- For:** The approach / project / bursary the interaction is related to
- Type:** Type of engagement
- Attachments:** Supporting documents
- Text field:** Details of the interaction

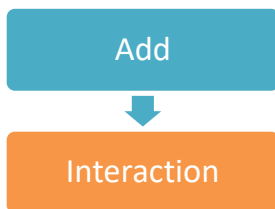
Description	Meeting to discuss M&E objectives				
Date	30/11/2017				
With	<table border="1"><tr><td>Fraser-Smith, NS</td><td>International Finance Corporation</td></tr><tr><td>Mabuza, Siphon (Mr)</td><td>International Finance Corporation</td></tr></table>	Fraser-Smith, NS	International Finance Corporation	Mabuza, Siphon (Mr)	International Finance Corporation
Fraser-Smith, NS	International Finance Corporation				
Mabuza, Siphon (Mr)	International Finance Corporation				
By	<table border="1"><tr><td>Brown, Chris (Mr)</td><td>African Children Education Fund</td></tr></table>	Brown, Chris (Mr)	African Children Education Fund		
Brown, Chris (Mr)	African Children Education Fund				
For	<table border="1"><tr><td>Dlamini, Delisile Phindile (Ms)</td><td>Blue Sky Programme</td></tr></table>	Dlamini, Delisile Phindile (Ms)	Blue Sky Programme		
Dlamini, Delisile Phindile (Ms)	Blue Sky Programme				
Campaign					
Interaction type	Meeting attended				
Attachments	17/01/2018 M&E Indicators.pdf				

**B I U S x<sub>2</sub> x<sup>2</sup> I<sub>x</sub>** | | MEETING MINUTES

Introduction:

## Add an interaction

On the relevant contact, approach, project or bursary profile select:



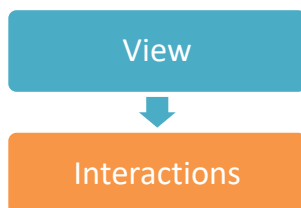
**With:** Defaults to the linked contact person  
**By:** Defaults to the user logged in  
**For:** Defaults to the approach, project or bursary

To add additional contacts to any of the above, start by typing the name in the relevant text box and select from the drop down.

Complete all details and save.

## View interactions

The summary page will show the most recent interactions in the Activity section. Click on a specific row to view the details. To view all interactions select:

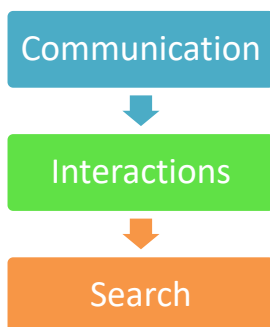


Click on a row to view the details.

The Home page also displays activities logged in the past week.

## Reports

Draw interaction reports by going to:



**You can report on all interactions based on:**

- By a specific team member
- With a specific contact
- For a specific project / approach / bursary
- Over any time period

Apply your filters then select 'Search'.  
View output on screen or select 'Report' to print one of the standard report layouts.

## Add an interaction from your email

### SENDING EMAILS

Simply Bcc a DevMan system email address when sending from your mail application and an interaction will be automatically created in DevMan. \*

Contacts that DevMan recognizes by means of the email address will be represented on the interaction as follows:

- With – will show all email recipients (direct and Cc'd)
- By – will show your name as the sender
- Any attachments will be included
- The interaction will be flagged as an email sent
- The body of the email will show in the text field

### FORWARDING EMAILS

Important emails received can also be forwarded to DevMan to log an interaction.

From your email application select 'Forward', remove any signatures and send to your DevMan system email address. \*

Contacts that DevMan recognizes by means of the email address will be represented on the interaction as:

- With – will show you as the recipient as well as anyone else Cc'd
- By – will show the sender
- Any attachments will be included
- The body of the email will show in the text field

### INCLUDE THE 'FOR'

To include the approach / project / bursary as the 'For' on your emailed interaction, your database must be set up to include a system reference number in the subject line of emails generated from DevMan. When these emails are forwarded, the interaction will be linked to the approach / project / bursary with the matching reference number.

### \*PLEASE NOTE

Contact DevMan helpdesk for system set up.

If the email address is not recognized it will be noted at the top of the text field of the record – if required these contacts can be added to the database and manually linked in the With or By fields

DevMan checks for emails every 30 minutes during the day.