

QUICK PART SETUP AND USE INSTRUCTIONS: INTERACTION BUILDING BLOCK TEXT

What's a Quick Part?

A Quick Part is essentially a shortcut that saves time typing, and it's a feature available in Microsoft Office products. By setting up a reusable text block as a Quick Part in Outlook, you can automatically fill text content into an email (or calendar entry) just by typing a keyword or phrase. For example, using a Quick Part helps facilitate communication when *one* person is regularly relaying information to *another* person to be entered into Ali CRM as an interaction. We aim to document key points each time we engage a constituent, allowing teams to collaboratively provide the most consistent and customized experience possible for our alumni, donors and friends. By using a Quick Part, we ensure the most critical information is always included in our documentation efforts.

How can this help me with my work?

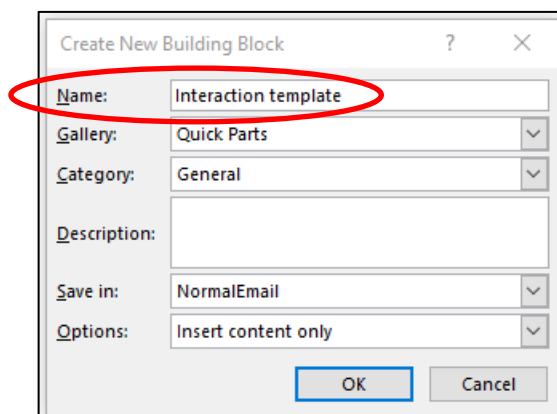
Let's say you have certain words, outlines, or lists that you need to type frequently. Instead of retyping this content or saving it in a Word document and copy/pasting it every time you need it, imagine that you just start typing a keyword and the content automatically appears where you need it.

When should I use a Quick Part?

Anytime it would benefit you! However, these specific instructions refer to composing and entering contact reports that facilitate the entering of interactions in Ali CRM. University partners may use Quick Parts to create more thorough and standardized interaction documentation, which is easier for administrative or support staff to enter in Ali. You and your team know what works best and there is no right or wrong way to do it — it's up to you to decide your team's standard process.

How do I create a Quick Part?

1. Open Outlook and select **New Email**. Type or copy/paste the text and select the content that you want to store as a reusable building block.
 - **Please see the suggested interaction template building block at the end of this document. Copy/paste the template into your email, then *highlight the content*.**
2. On the **Insert** tab, in the **Text** group, select **Quick Parts**.
3. Select **Save Selection to Quick Part Gallery**.
In the **Create New Building Block** box, add:
4. **Name** — Type a unique name. (This is your “keyword” phrase — *Interaction template* or something similar.) Here are the recommended settings:

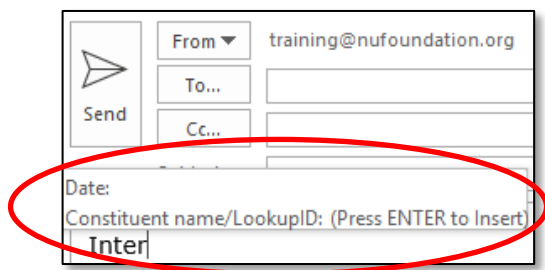


5. OPTIONAL: Adjust the following settings if you wish (otherwise leave them set at default values):
 - **Gallery** — Select the gallery where you want the building block to show up.
 - **Category** — Select a category, such as **General** or **Built-In**, or create a new category.
 - **Description** — Type a description of the building block.
 - **Save in** — Select the name of the template from the drop-down menu.
 - **Options**
 - A. **Insert in own paragraph** — This will insert the content in its own paragraph, directly below the cursor point, and place the cursor on the next line.
 - B. **Insert content in its own page** — This will insert the content into its own page.
 - C. **Insert content only** — This applies to all other content.
6. Select OK.

How do I use a Quick Part?

There are two ways to access a Quick Part:

1. Place the cursor where you want to insert a building block in your email or calendar entry. Start typing your **keyword**, and when you see a box appear by your cursor (see below), press the keyboard's **Enter** key and the content will populate.



2. Alternatively, place the cursor where you want to insert the content. On the **Insert** tab, select **Quick Parts**. Then select the building block you want to use.

Suggested interaction template building block:

Date:
Constituent Name/LookupID:
Objective:
General Notes:
Outcome and Next Steps:
Color Commentary:

Example of completed text block:

Date: 5/1/2019
Constituent Name and/or LookupID: Josie Jones — 8675309
Objective: Met with Bill to discuss campus project.
General Notes: Bill feels excited about how the project is coming along and communicated to me that he'd like to follow up in June.
Outcome and Next Steps: Follow up with Bill June 15.
Color Commentary: Bill's granddaughter just finished her sophomore year in high school. He's excited for her to start looking at schools and hopes she will become a Husker!