

System Admin: Export & Update Stakeholders

Tractivity® Help Guides

Export & Update Existing Data

As well as uploading new data, you can **export and update existing data** that has already been added to Tractivity.

This is handy when, for example, you need to update many Contacts.

1. Go to **System Admin**
2. By the left-hand menu, under **Configuration**, click **Import Stakeholders**
3. Select **Export & update existing data**
4. Select the correct project you wish to update
5. Click **Next**
6. Finally, click **Export Data for Mass Upload**

Tractivity®

System Admin | Help Center | Archive | My Settings | Log-out
 Logged-in as: Luke Gratton | Last log-in: 10:42 on 31/10/2023
 You are currently viewing: Luke's Project

HOME | CALENDAR | BUILDINGS | ORGANISATIONS & CONTACTS | ENQUIRIES | ISSUES | STAKEHOLDER MAPPING | STRATEGY PLANS | SURVEYS
 LAND PARCELS | LIBRARY | DISTRIBUTION LISTS | EVENTS | EMAIL | MAILSHOTS | REPORTS | WORKFLOW

System Admin: Organisation & Contact Import

Client:
 - View Client

Communication:
 - Send Preferences Email

Stakeholders:
 - Import Stakeholders
 - Merge Stakeholders
 - Share Stakeholders

Configuration:
 - Field Configuration
 - Global System Data
 - Project System Data
 - Email Configuration
 - Email Servers
 - Subscription Preferences

I would like to:
☐ Upload new data
☒ Export & update existing data

For the following Project: Luke's Project

NEXT

Step 1: Export Data for Upload

To review and update existing data within Tractivity, click on the Export Data for Mass Upload button. This will take you to a search screen that allows you to find and export the Organisation, Contact and Building data that you would like to update. You can export the data in three modes – Organisation Only, Contact Only or Building Only. If you plan to only update some categories against a contact, then only export the contact data.

EXPORT DATA FOR MASS UPLOAD

Exporting Data

You will have the ability to export specific data that exists in your project.

Because of this, when clicking **Export Data for Mass Upload** you'll arrive at a Search screen.

Use the Search function to find specific types of data

OR

To return **all data**, simply leave all fields blank and click **Submit**

Once submitted, the **Organisations, Contacts & Buildings** you've searched for will be returned

System Admin: Export Data for Mass Upload Q

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- Email Servers
- Subscription Preferences Configuration
- Event Configuration
- External Forms
- Stakeholder Mapping Attributes
- SMS Configuration
- IP Configuration

BACK

Organisation Sectors	Select options	Organisation Account Handlers	Select options
Contact Stakeholder Categories	Select options	Contact Created Date	<input type="text"/> to <input type="text"/>
Contact Influence	Select options	Contact Project Interests	Select options
Building Postcode	<input type="text"/>	Contact Ethnic Group	Select options
Building Town	Select options	Building Name	<input type="text"/>
Building Type	Select options	Building County	Select options
Land Parcel Title (Fretext)	<input type="text"/>	Building UPRN	<input type="text"/>

SUBMIT **SETTINGS** **CLEAR**

Organisations, Contacts & Buildings

No results to display

Organisations, Contacts & Buildings

Found 6 Organisations, 2 Contacts & 2 Buildings

EXPORT RESULTS

Exporting Data (continued)

When clicking **Export Results** you will be given the option to choose the type of data you would like to export.

You can choose from:

Organisations

Contacts

Buildings

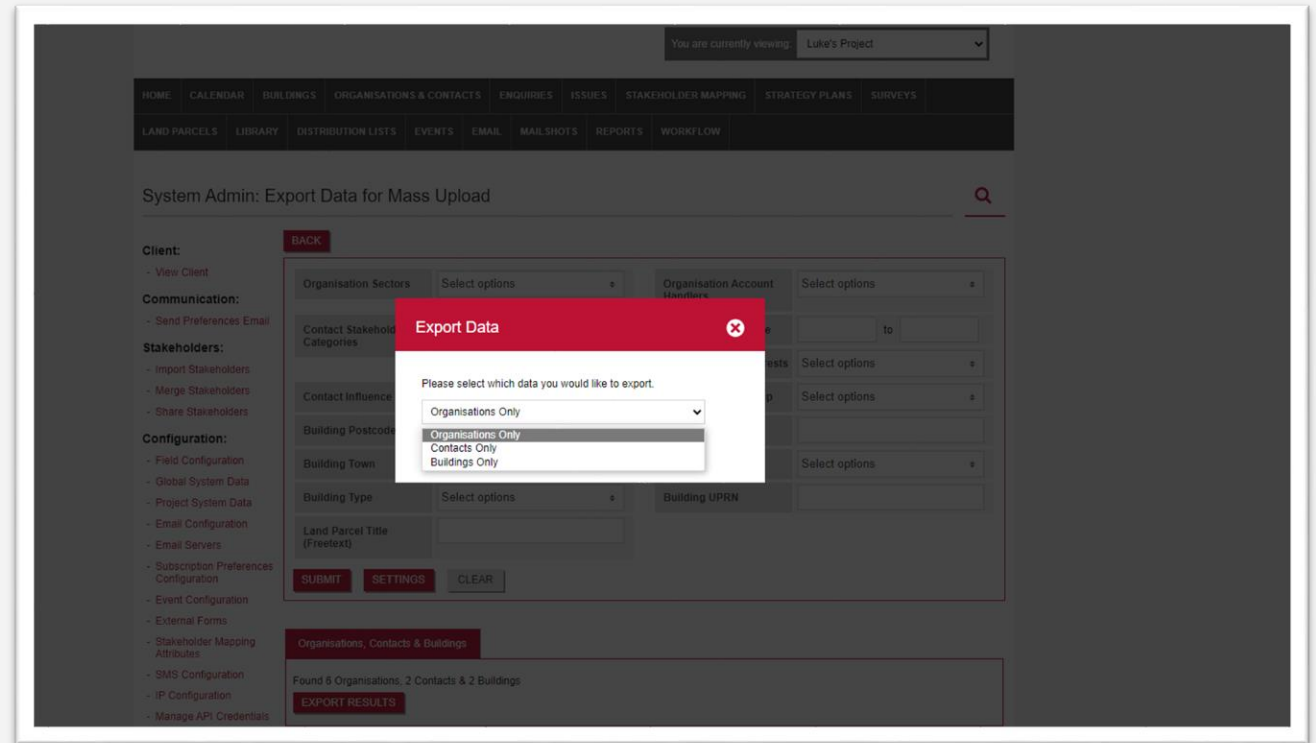
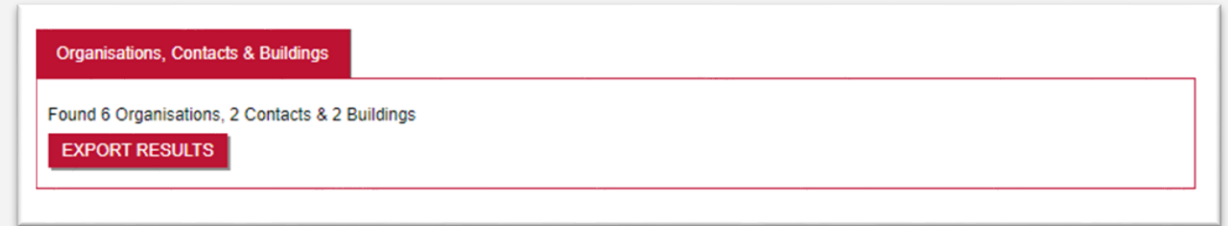
Select the **type of data from the dropdown** that you wish to update.

Tractivity will **email** the export information to you. **Please note:** this may take time depending on the size of the dataset.

The email you will receive will have the subject line: **Your Stakeholder Export report is here** from

customersuccess@tractivity.co.uk

The export will be attached for you to open and amend



3

4

Important Rules for Exported Data

Please note: if you remove any information that exists in the spreadsheet you download this will be **removed** from Tractivity.

Tips:

- **Do not add additional rows – this tool is designed to update existing data, not add new data.**
- **Do not remove Organisation and/or Contact IDs – these are used for duplication checking.**

If you have exported All Data, some Organisations, Contacts and Buildings may appear across multiple rows. Ensure that any updates that you make are applied to **all** the records in the sheet as if you only update some of the 'duplicate' rows, the changes may not be made.

1												
2	Contact											
3	Please enter all the Contact details that you wish to import directly within Tractivity.											
4	(The data columns displayed below are those currently visible within tractivity.)											
5	Contact ID	Title	First Name	Last Name	Email	Postcode	Telephone	Mobile	Job Title	Preferred Language	Regions	
6	449		Demo	Training 1	demo@demo.org							
7	484		Demo	Training 2	demo@demo.org							
8	178		Demo	Training 3	demo@demo.org							
9	1645		Demo	Training 4	demo@demo.org							
10	1770		Demo	Training 5	demo@demo.org							
11	1745		Demo	Training 6	demo@demo.org							
12	1756		Demo	Training 7	demo@demo.org							
13	2253		Demo	Training 8	demo@demo.org							
14	423		Demo	Training 9	demo@demo.org							
15	1738		Demo	Training 10	demo@demo.org							
16	1859		Demo	Training 11	demo@demo.org							
17	1760		Demo	Training 12	demo@demo.org							
18	486		Demo	Training 13	demo@demo.org							
19	1895		Demo	Training 14	demo@demo.org							
20	1706		Demo	Training 15	demo@demo.org							
21	2103		Demo	Training 16	demo@demo.org							
22	2023		Demo	Training 17	demo@demo.org							

If you **remove** any data that exists in the export, when re-uploaded, this will be removed from Tractivity.

	K	S	I	U	V	W	X	Y	Z	AA	AB	AC
1												
2	Contact											
3	Please enter all the Contact details that you wish to import directly within Tractivity.											
4	(The data columns displayed below are those currently visible within tractivity.)											
5	Contact ID	Title	First Name	Last Name	Email	Postcode	Telephone	Mobile	Job Title	Preferred Language	Regions	Project Interests
6	449		Demo	Training 1	demo@demo.org							Interest 1
7	484		Demo	Training 2	demo@demo.org							Interest 1 Interest 2
8	178		Demo	Training 3	demo@demo.org							Interest 2
9	1645		Demo	Training 4	demo@demo.org							Interest 3
10	1770		Demo	Training 5	demo@demo.org							Interest 1 Interest 2 Interest 3
11	1745		Demo	Training 6	demo@demo.org							Interest 1 Interest 2 Interest 3
12	1756		Demo	Training 7	demo@demo.org							Interest 1 Interest 2 Interest 3
13	2253		Demo	Training 8	demo@demo.org							Interest 1 Interest 2 Interest 3
14	423		Demo	Training 9	demo@demo.org							Interest 1 Interest 2 Interest 3
15	1738		Demo	Training 10	demo@demo.org							Interest 1 Interest 2 Interest 3
16	1859		Demo	Training 11	demo@demo.org							Interest 1 Interest 2 Interest 3
17	1760		Demo	Training 12	demo@demo.org							Interest 1 Interest 2 Interest 3
18	486		Demo	Training 13	demo@demo.org							Interest 1 Interest 2
19	1895		Demo	Training 14	demo@demo.org							Interest 1 Interest 2
20	1706		Demo	Training 15	demo@demo.org							Interest 1 Interest 2
21	2103		Demo	Training 16	demo@demo.org							Interest 1 Interest 2
22	2023		Demo	Training 17	demo@demo.org							Interest 1 Interest 2
23	825		Demo	Training 18	demo@demo.org							Interest 1 Interest 2
24	1764		Demo	Training 19	demo@demo.org							Interest 1 Interest 2
25	2256		Demo	Training 20	demo@demo.org							Interest 1 Interest 2
26	2014		Demo	Training 21	demo@demo.org							Interest 3
27	1755		Demo	Training 22	demo@demo.org							Interest 3
28	2127		Demo	Training 23	demo@demo.org							Interest 3
29	1954		Demo	Training 24	demo@demo.org							Interest 3
30	2265		Demo	Training 25	demo@demo.org							Interest 3
31	1941		Demo	Training 26	demo@demo.org							Interest 3
32	2001		Demo	Training 27	demo@demo.org							Interest 3
33	2208		Demo	Training 28	demo@demo.org							Interest 1 Interest 2 Interest 3

Upload & Validate

Once you're happy with your updated dataset, **save** your file. On the page **Export Data for Mass Upload**, click **Back**

System Admin: Export Data for Mass Upload Q

Client: BACK

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Configuration:

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- Email Servers

- Subscription Preferences Configuration

- Event Configuration

Organisation Sectors

Contact Stakeholder Categories

Contact Influence

Building Postcode

Building Town

Building Type

Land Parcel Title (Freetext)

Organisation Account Handlers

Contact Created Date to

Contact Project Interests

Contact Ethnic Group

Building Name

Building County

Building UPRN

SUBMIT SETTINGS CLEAR

In **Step 2** choose the file you wish to validate. We recommend renaming this for ease.

Step 2: Upload and Validate the Template

Once you have updated your template, upload by using the **Choose File** button below and click **Upload and Validate**. Once the Validation is complete, you will be informed whether the upload was a success or failure. In both cases, a summary document will be available to download.

- On failure, this document will describe any issues and in which cells they occur.
- On Success, this document will list the numbers of records that will be updated and added to Tractivity. The document will also list any new system data that will be added to your Tractivity system, as part of the upload. **Please review these carefully**, ensuring that there are no typos and that you are happy for all options to be added to your system.

Top Tip - Please ensure that any towns added within the summary document are valid towns and not roads or counties entered in the wrong column.

CHOOSE FILE

Updated Data Demo.xlsx

UPLOAD AND VALIDATE

Final Steps

Always **Download Summary** so you're aware of the information you're adding to your system prior to importing your updated stakeholder information.

Once you're happy, you can **Import Data**

Congratulations!

You've successfully updated your stakeholder information inside Tractivity. Please review any organisations/contacts and/or buildings to ensure you're happy.

1
2
1

File validated successfully

[DOWNLOAD SUMMARY](#)

Name: Import Demo.xlsx
Size: 13Kb
Line count: 1
Projects: Luke's Project

Please click the button to download a full summary.

Step 3: Import the Data

If you would like to update your spreadsheet or re-start the upload data process, then click on the Cancel button.

Once you have reviewed the Summary Document and you are happy that all System Data options being added are correct, please click the Import Data Button. This will add all data within your spreadsheet into Tractivity.

Please be aware that once you start the import process, this cannot be stopped and data within your Tractivity system will be added or updated. If you have any concerns at all, please contact the Tractivity support team support@tractivity.co.uk.

[IMPORT DATA](#)[CANCEL](#)

Step 3: Import the Data

If you would like to update your spreadsheet or re-start the upload data process, then click on the Cancel button.

Once you have reviewed the Summary Document and you are happy that all System Data options being added are correct, please click the Import Data Button. This will add all data within your spreadsheet into Tractivity.

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Data Imported Successfully

[DOWNLOAD SUMMARY](#)[IMPORT MORE DATA](#)



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