Tractivity®

Adding Enquiries & Activities

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Adding Stakeholders, Enquiries and Issues to Your System

Add Contact → Add Enquiry → Add Activities → Tag Issues

Definition of an Enquiry & Activity – learn the lingo.

Activities are Interactions with your Stakeholders.

Any interaction between Stakeholders and team members are considered ‘Activities’ inside Tractivity. Activities are configured to your organisation’s requirements and frequently feature phone calls, emails, meetings and letter drops.

An Enquiry acts as a folder for your Activities.

Creating an Enquiry is a simple way to group all interactions with your Stakeholders, allowing you to link all your communications to a Phase, Stakeholder Category, Reason for Engagement and any Associated Organisation.

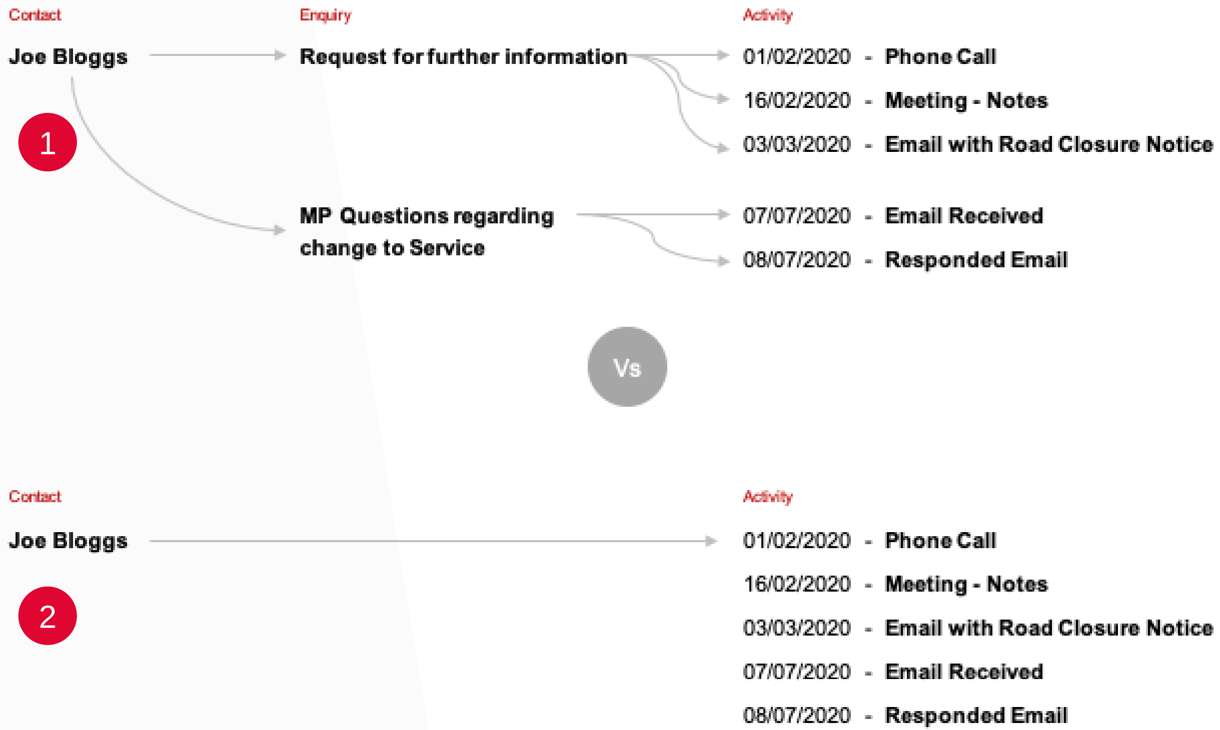
Imagine your desktop filing system - you create a folder and inside, file away documents such as a Word document, PDF or an Excel spreadsheets. Inside Tractivity an Enquiry is your folder and activities are all documents and conversations you add to the folder.

Do I need an Enquiry?

In answer to this question – most of the time yes! This diagram shows the same information added to Tractivity in **two different ways.**

1. Example one has used Enquiries, with all Activities stored away inside an Enquiry (folder).
2. Example two shows all the Activities added to Tractivity, straight against the Contact.

In example two, when viewing all Joe Bloggs' Activities (interactions), it would be hard to understand which Activities are linked to the same conversation, or the outcome.

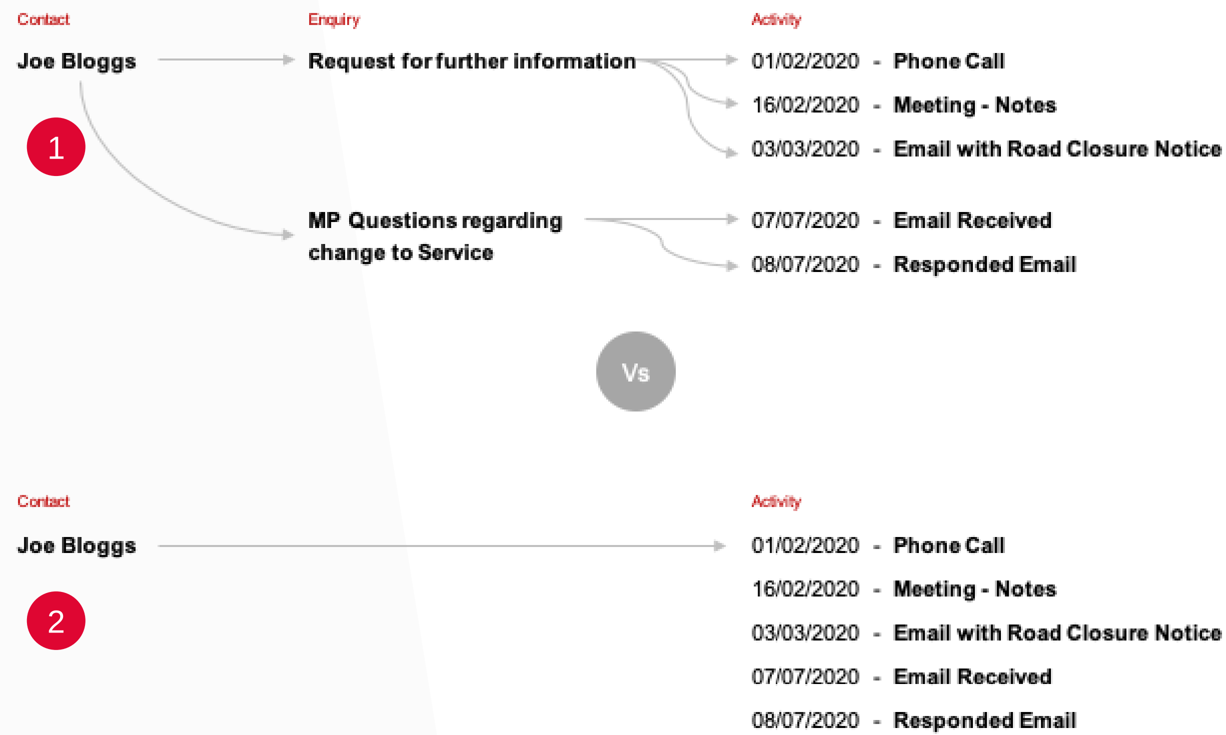


Always add an Enquiry against a Contact

If you used the second option of just adding ***just activities,*** should you wish to see **ALL Activities** that were linked to the road closure, you would be unable to do so.

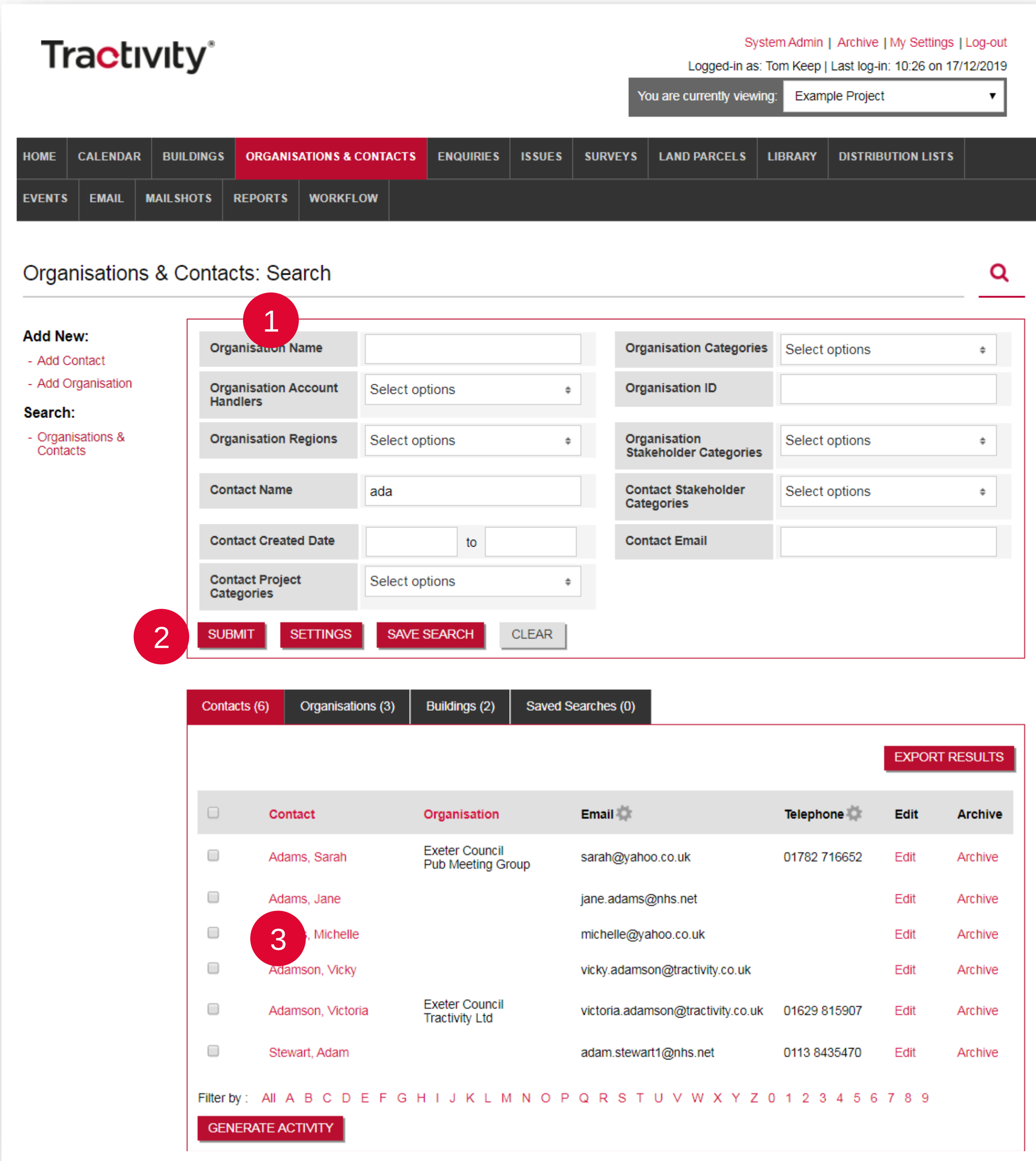
Using Option One this would be very easy.

Using **Enquiries** allows you to group your interactions easily.



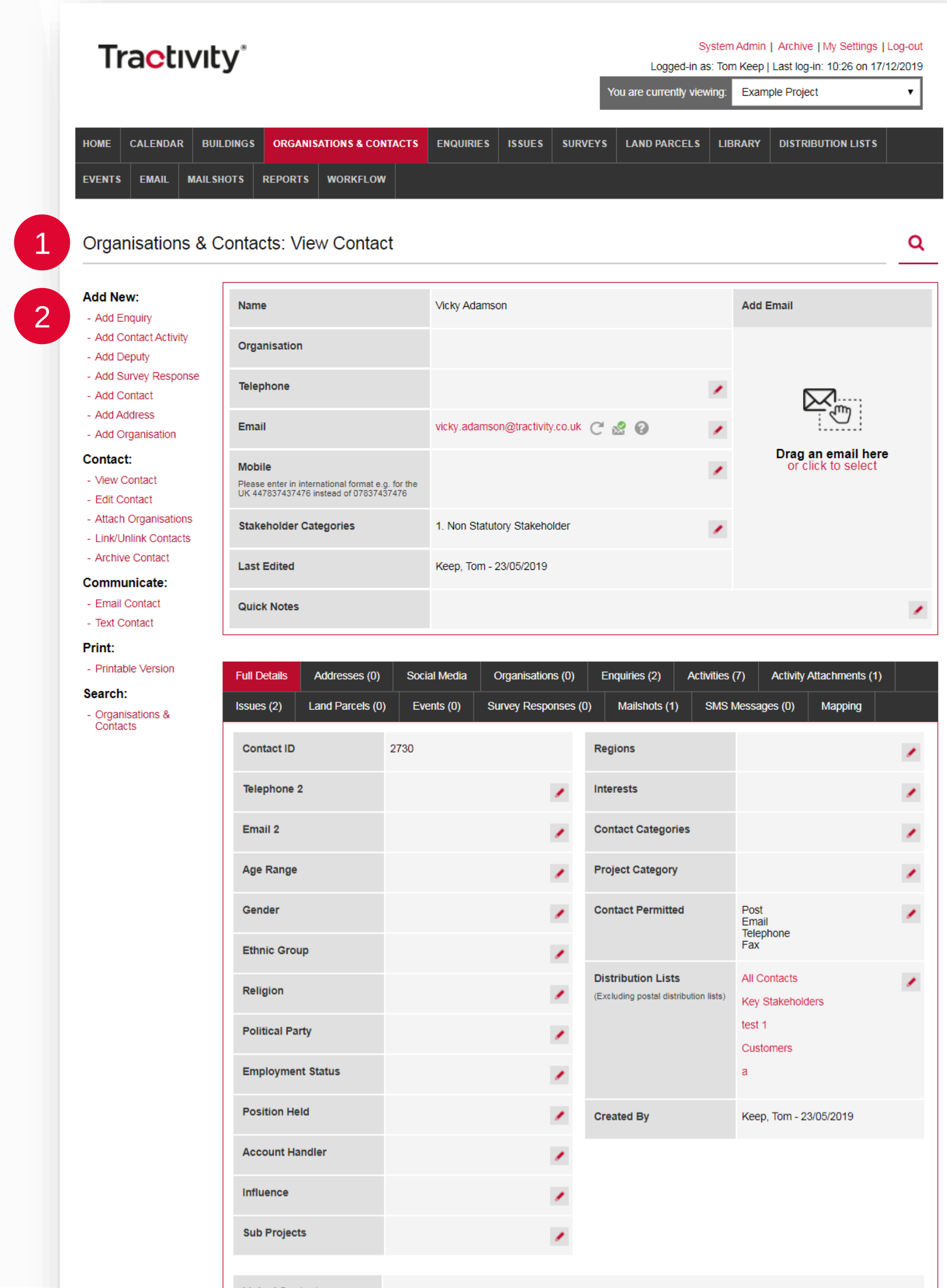
<u>Always</u> add an Enquiry against a Contact

1. Inside the **Organisations & Contacts Module**, use the search boxes to find your Contact.
2. If you wish to return <u>every</u> Contact, Organisation and Building inside Tractivity, just press **SUBMIT.**
3. Click on the Contact's name, *<u>highlighted as red clickable link.</u>*



Always add an Enquiry against a Contact

1. From the **View Contact** screen, if unsure please refer to the page title for reassurance.
2. On the **Left-Hand-Menu,** select **Add Enquiry.**



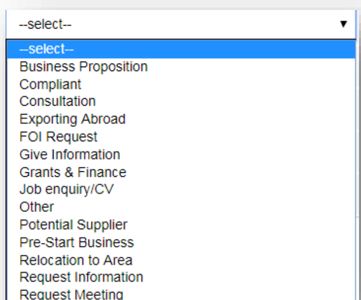
Adding an Enquiry

The nominated Superuser / System Admin can change and amend, at any time the information you record, drop-down menu options to which data is mandatory.

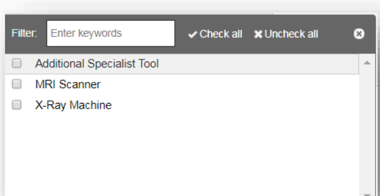
Key things to remember:

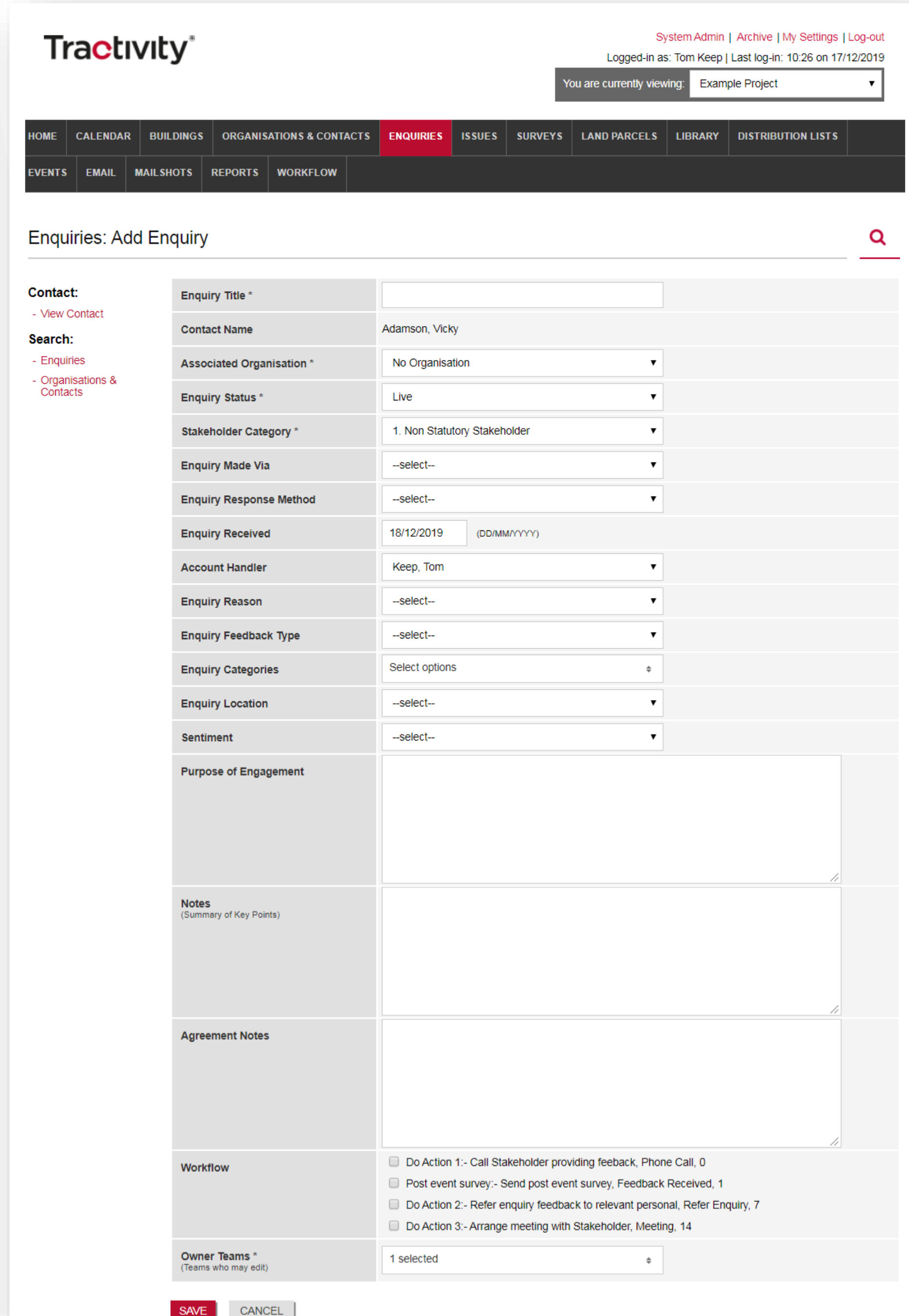
An **asterisk *** means the information is mandatory.

Drop-down menu options - select one answer:



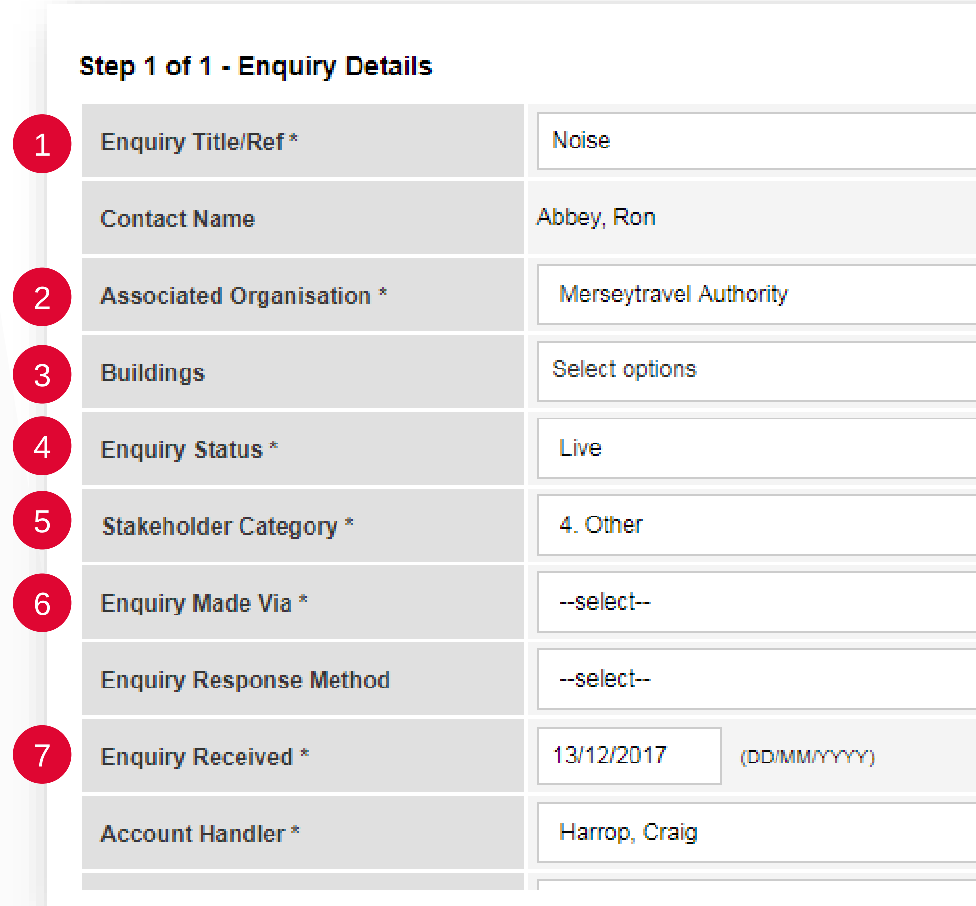
Checkboxes - you can select none, multiple or all.





Adding an Enquiry

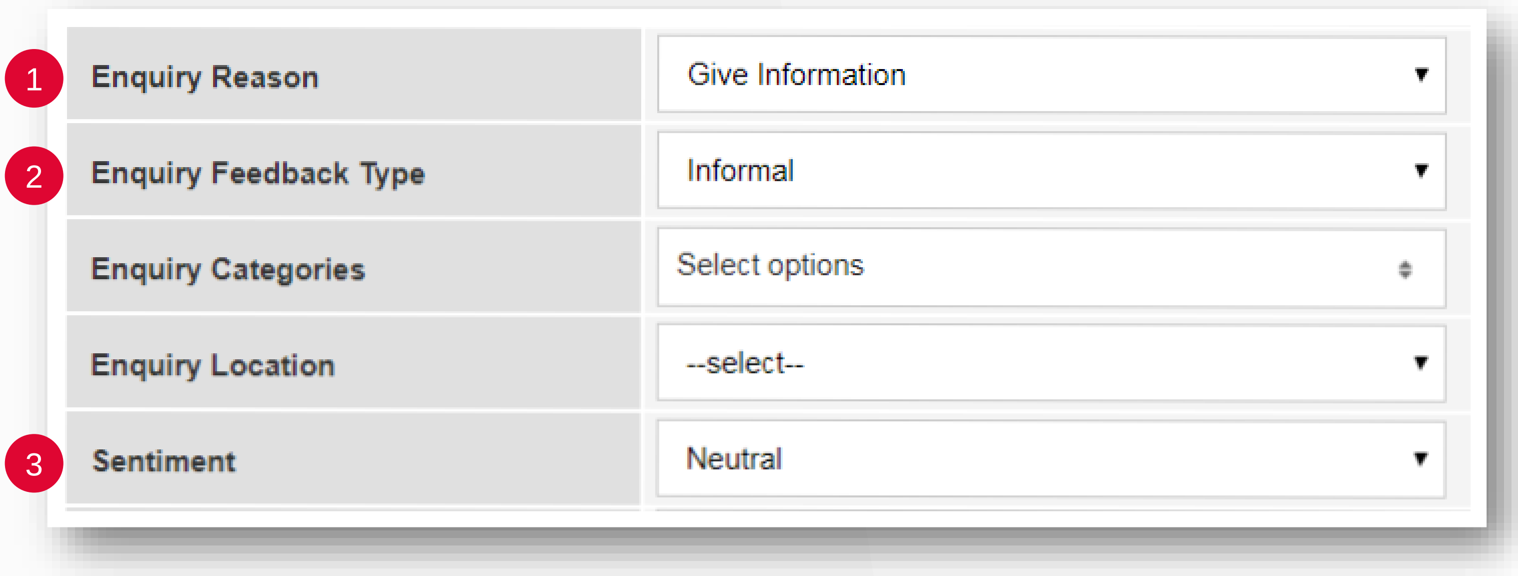
1. **Enquiry Title** - use a title that has relevance and provides an overview of all the interactions inside.
2. **Associated Organisation** - link your Enquiry to Organisation(s).
3. **Buildings** - associate your Enquiry directly to a Building. A Building is any address added to the system.
4. **Enquiry Status** - automatically set to LIVE. This can be changed later down the line. Allowing you to filter between Closed and Open Enquiries.
5. **Stakeholder Category** - select the hat your Stakeholder is wearing.
6. **Enquiry Made Via** - the source of the Enquiry.
7. **Enquiry Received** - don't worry, you can back-date.



Adding an Enquiry

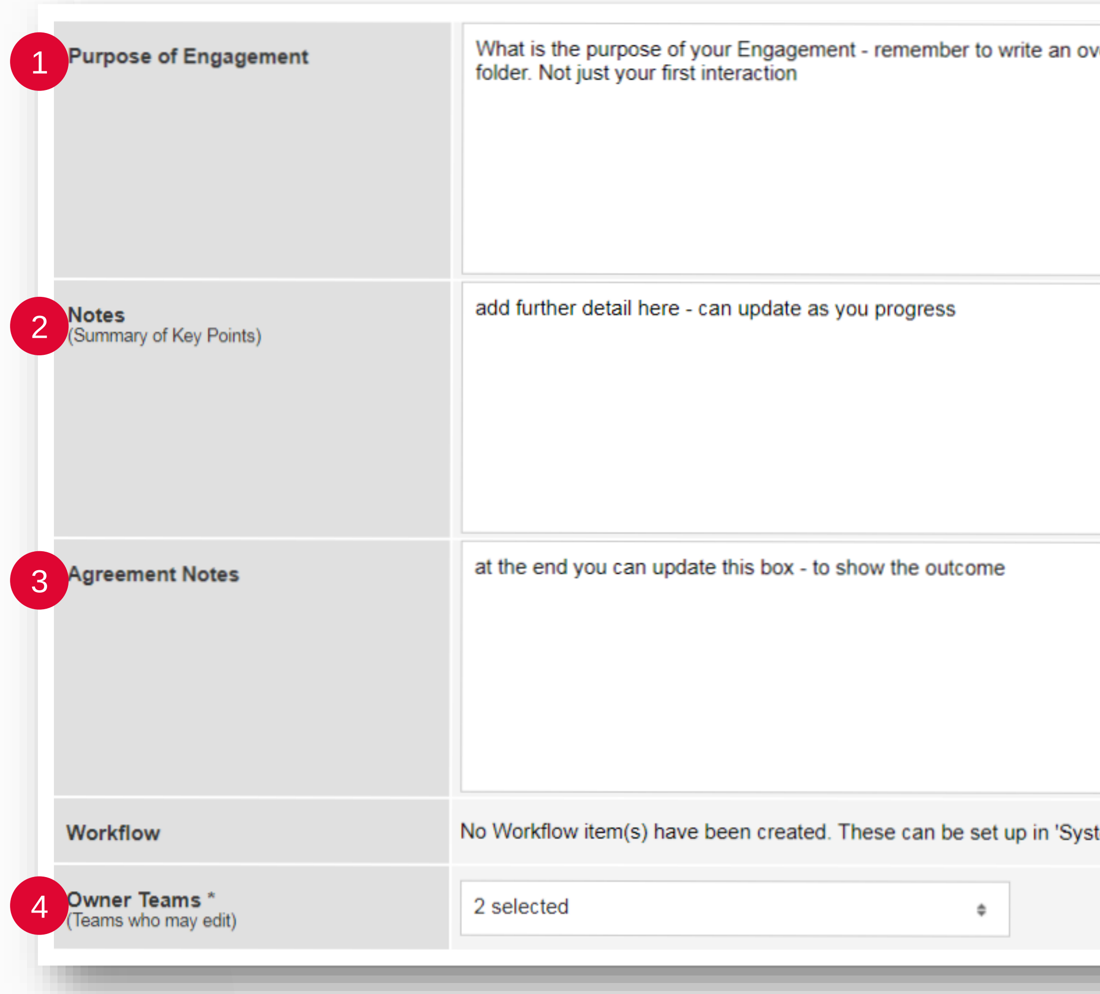
The following allows you to categorise your Enquiries even further, great for reporting!

1. **Enquiry Reason** - use the drop-down to record what type of Enquiry you have received. Examples of what you may find here include: Complaint, Compliment or Request for Information.
2. **Enquiry Feedback Type**, **Enquiry Categories, Enquiry Location** - each provides you with a drop-down menu allowing to select the most relevant option.
3. **Sentiment** - assign a sentiment to your Enquiry – neutral, negative or positive?



Adding an Enquiry

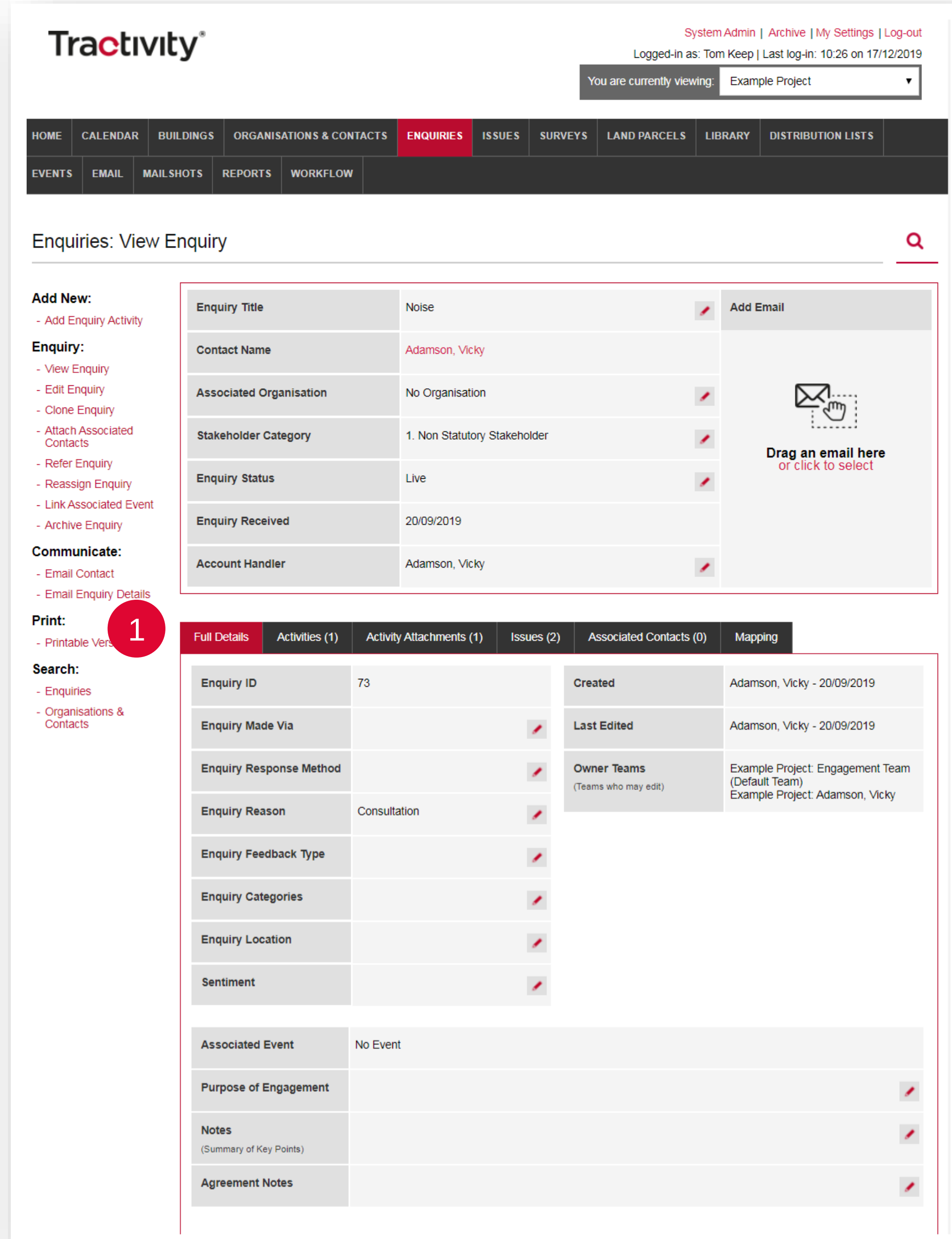
1. **Purpose of Engagement** - write a few sentences about your Enquiry, an overview of all the interactions inside your folder. For example, *'Unhappy with the level of communication provided so far. Wished to understand what communication we had carried out & why they hadn't seen or received these.'*
2. **Notes -** the Notes section is a useful place to add a summary of the Enquiry. You may update as your Enquiry progresses with a summary of the key points.
3. **Agreement Notes** - usually added at the end: What did you agree? What was the outcome?
4. **Owner Teams** - select who can edit access the Enquiry. Try to keep this as the default to allow all users the option to view/edit.



View Enquiry screen

The **View Enquiry Screen** will display all the Enquiry information you have added.

1. Use the **Half-way Navigation Bar** to view all information linked to the Enquiry, providing a full timeline of all linked interactions & details:
   - **Full Details**
   - **Activities**
   - **Activity Attachments**
   - **Issues**
   - **Associated Contacts**
   - **Mapping**

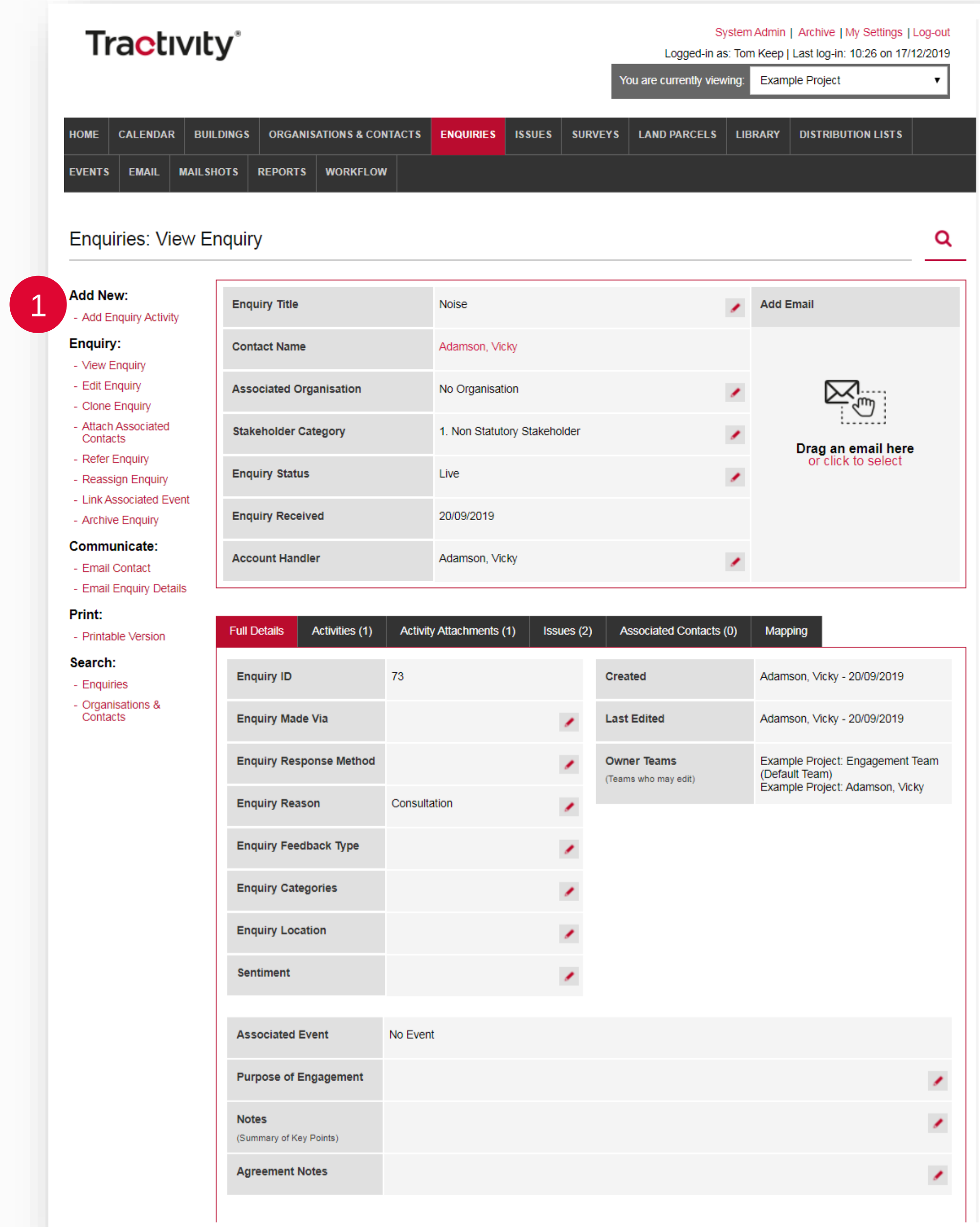


View Enquiry screen

From the **View Enquiry Screen…**

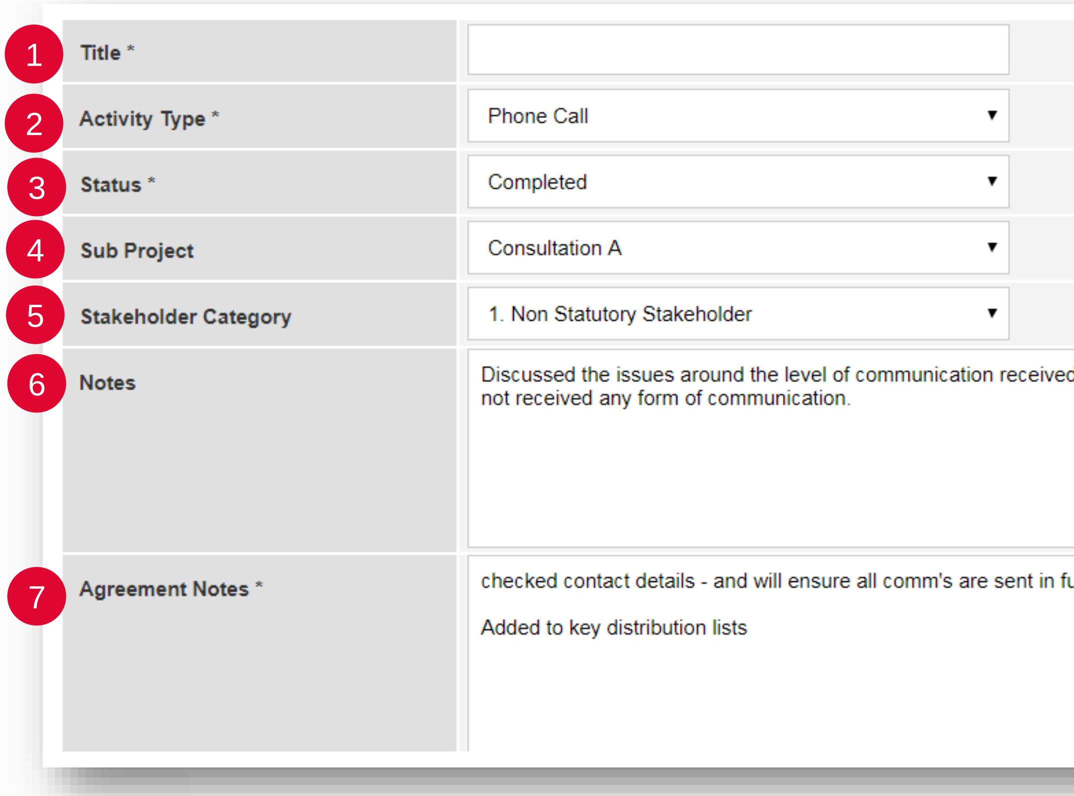
1. Select to **Add Enquiry Activity** from the left-hand menu.

Add as many Activities to an Enquiry, from phone calls, meetings & presentations. Record past or upcoming activities.



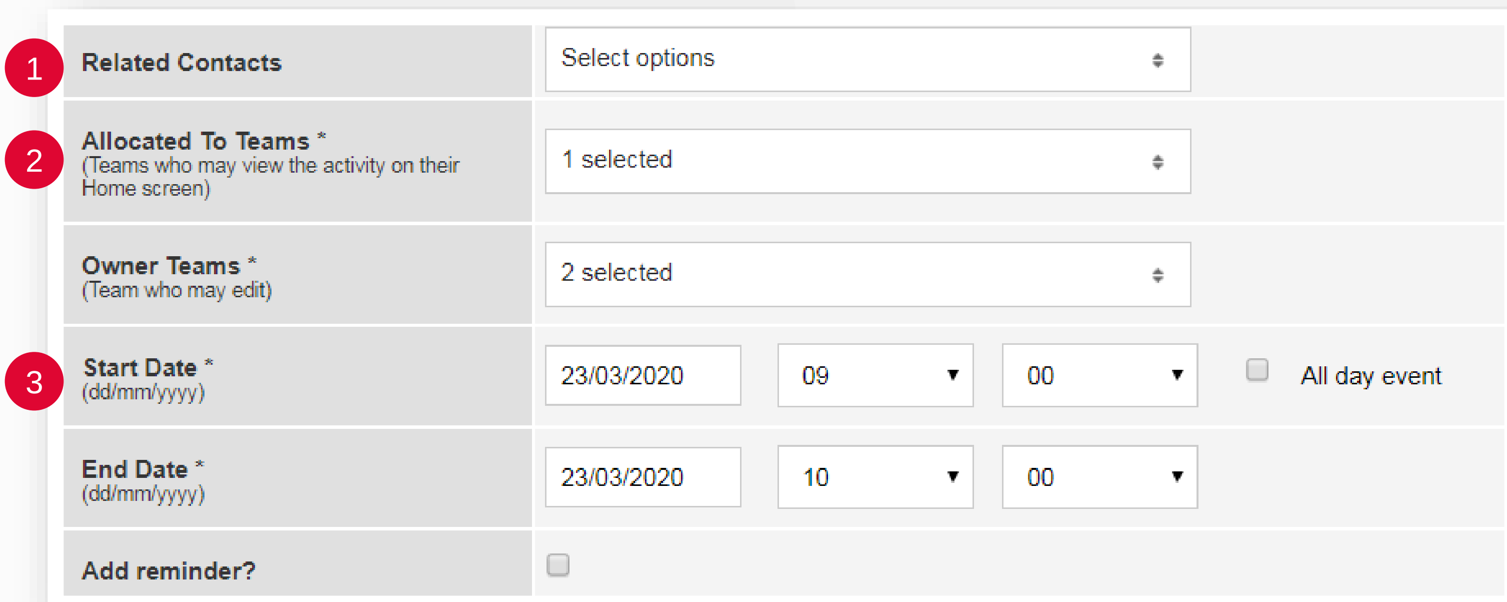
Add Enquiry Activity

1. **Title** - add a title which has relevance to the interaction.
2. **Type** - define the interaction type i.e. email, phone call or meeting.
3. **Status** - select the status of your Activity**.** **Completed** which is past tense (it has been done) or **Pending** meaning it's in the future
4. **Sub Project** - for those Organisations who run many mini projects, the capability to log which Sub Project your Activity is linked to.
5. **Stakeholder Category** - automatically pulled from the Enquiry. If this is blank or incorrect you will need to go back and ***Edit Contact.***
6. **Notes** - it's good practice to add as many Notes as possible. Add Notes regarding your interaction ***i.e. phone call conversation.***
7. **Agreement Notes** - the outcome of the interaction.



Add Enquiry Activity - continued

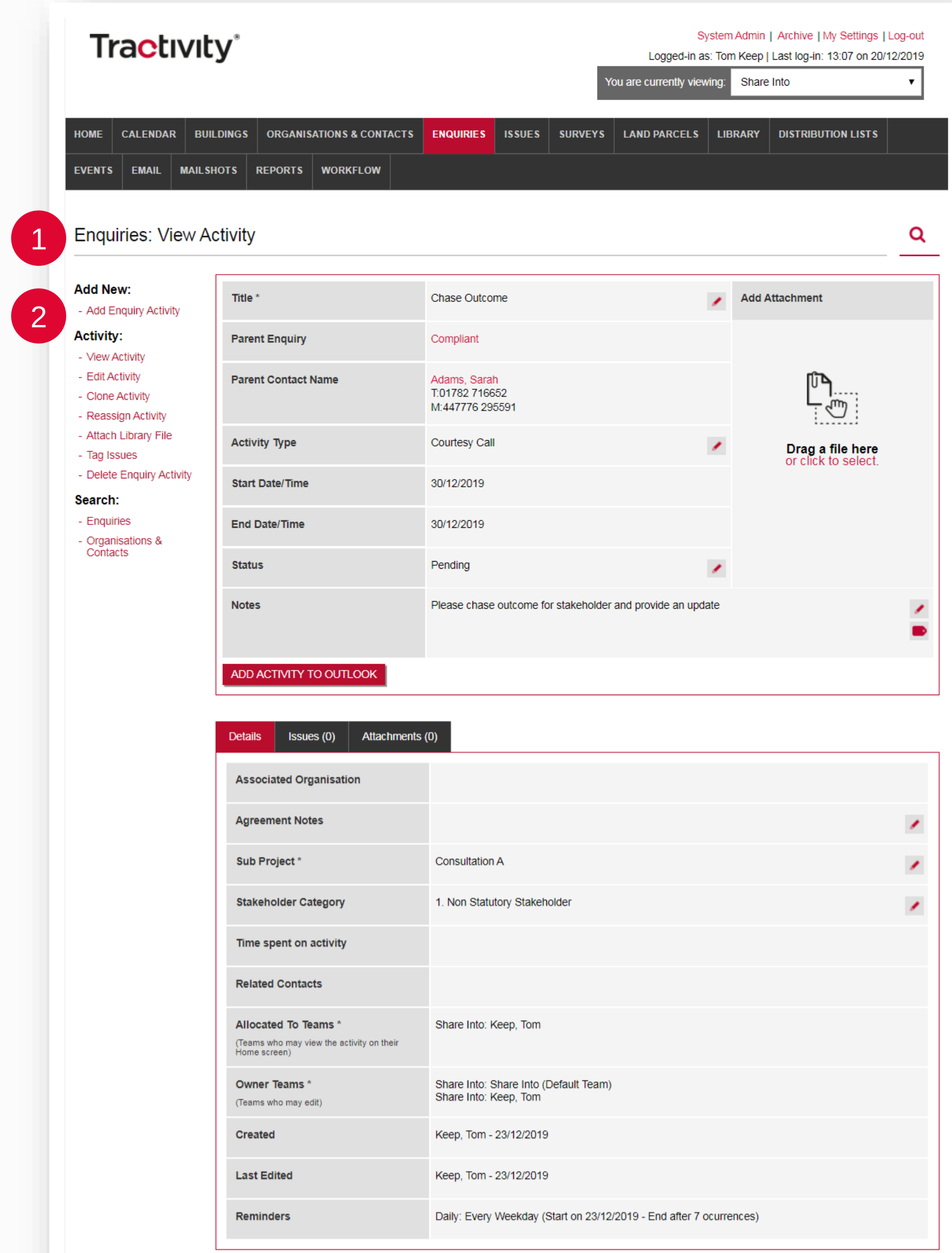
1. **Related Contact** - on the **View Enquiry Screen,** you have an option to add associated Contacts from the left-hand menu. This allows you to add multiple Contacts to one Enquiry. When adding any Activity you can link the Activity to one, a few or all associated Contacts.
2. **Allocated To Teams** - you can select the Team or Users who you wish to view the created Activity on their home screen. ***Please note – ONLY* Pending Activities** will only appear on the home screen.
3. **Start & End Date** - select the date and even specify the time you spent on the Activity.



Add More Activities

Add as many Activities, simply re-follow the slides from 12-15.

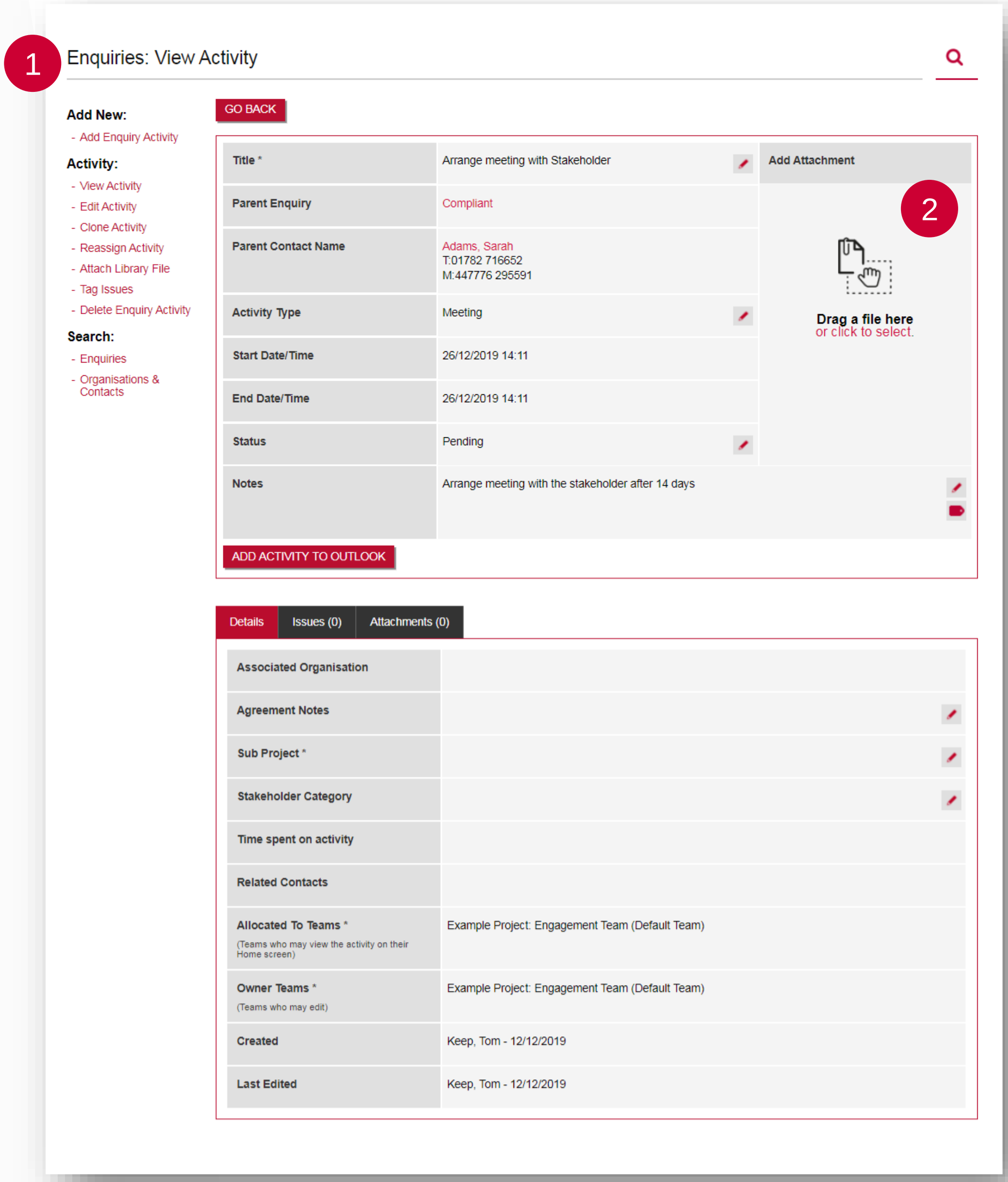
1. From the **View Enquiry or View Activity Screen.**
2. Select **Add Enquiry Activity** from the left-hand menu.



Adding Activity attachments

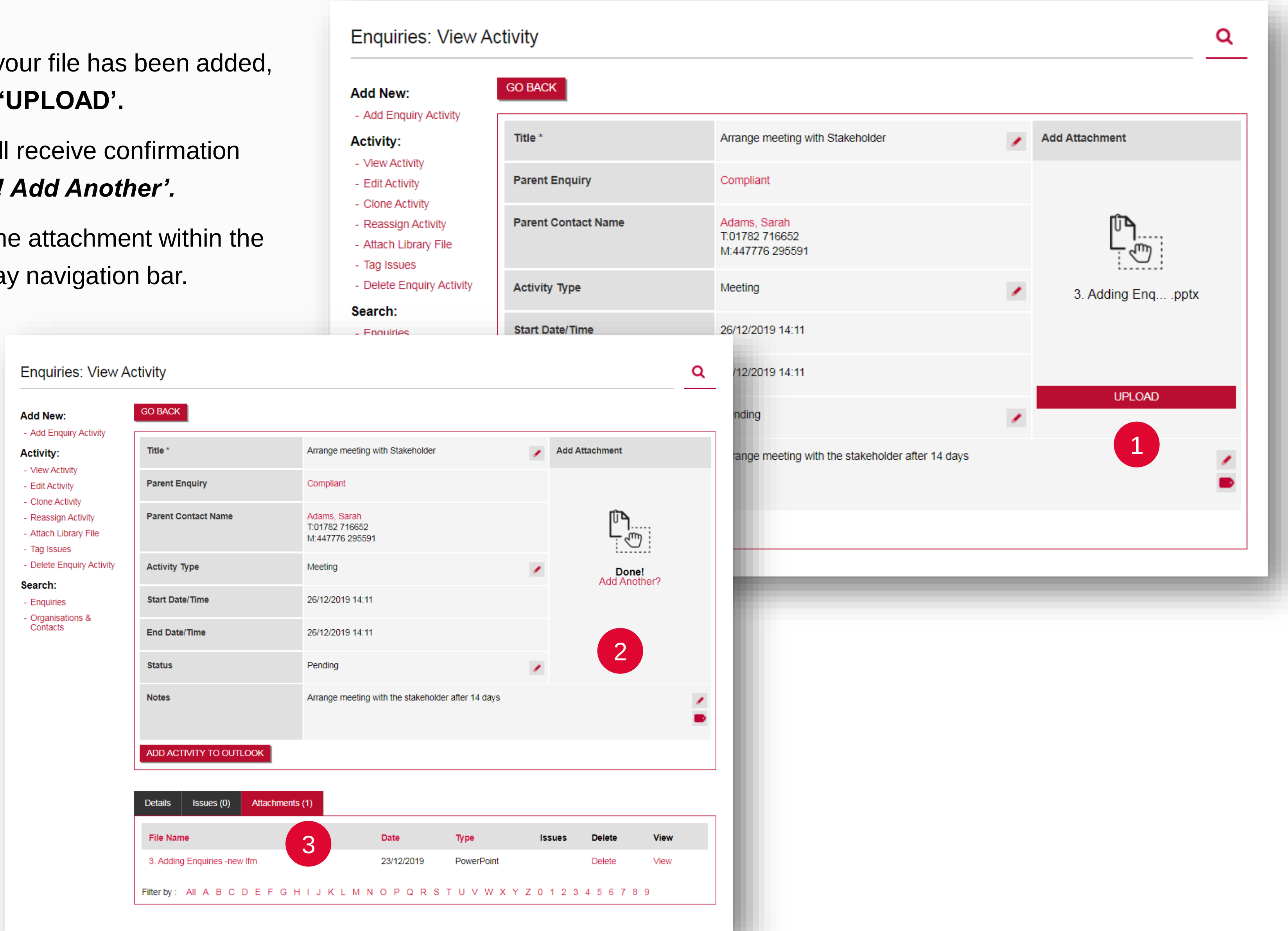
Attachments can only be added to an **Activity.**

1. From a **View Activity Screen**, double check by looking at the page title.
2. Also check the icon reads **Add Attachment**. **Choose a file** or **drag and drop a file**.



Adding Activity attachments

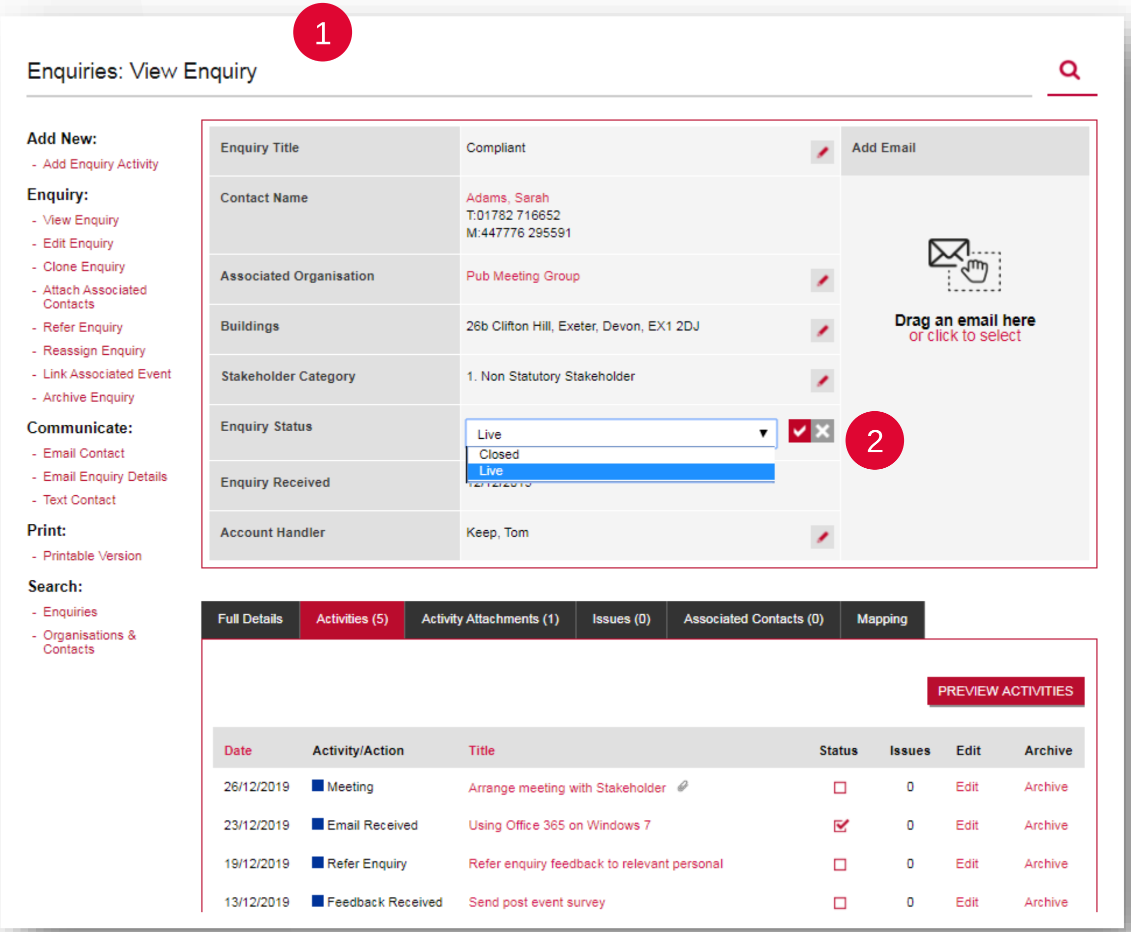
1. Once your file has been added, select **‘UPLOAD’**.
2. You will receive confirmation ***‘Done! Add Another’.***
3. View the attachment within the half-way navigation bar.



Close Your Enquiry

Close and re-open an Enquiry at anytime. To complete this task simply:

1. From the **View Enquiry Screen.**
2. Using the **Quick Edit Pen icon**, use the drop-down menu presented to select **Closed** or **Live.**



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