



Adding Enquiries & Activities



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Client Relationship Manager

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.

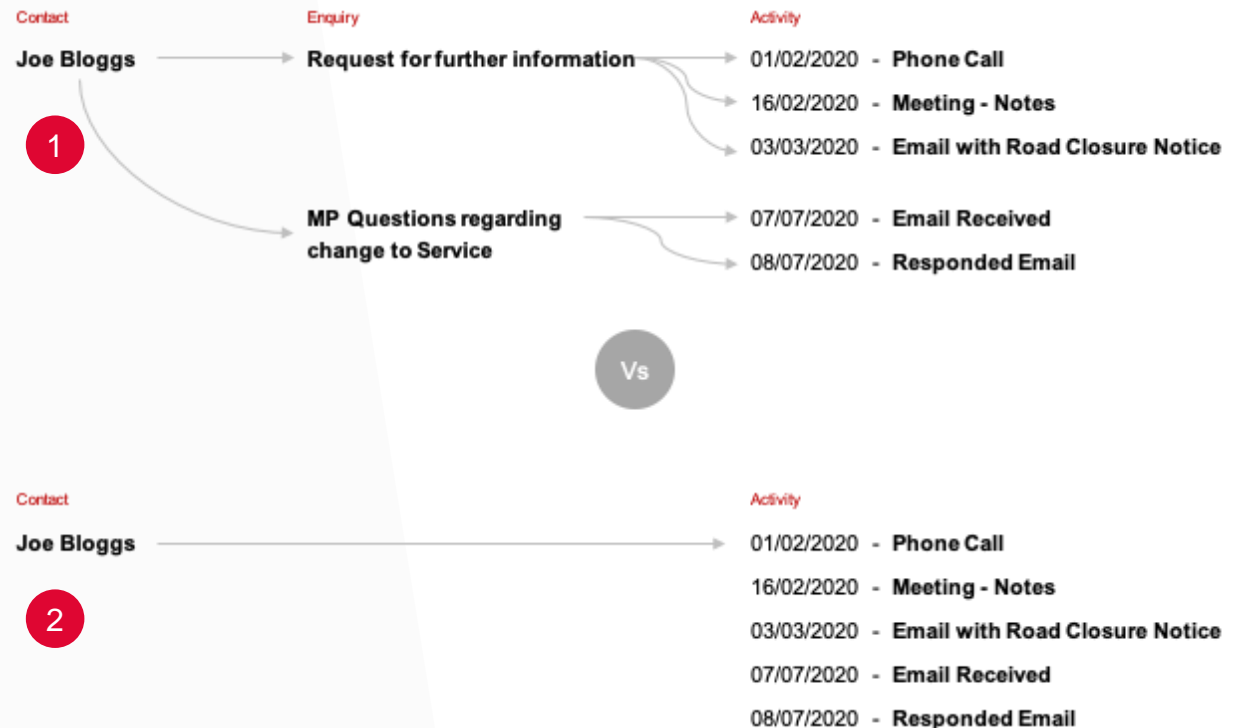
Imagine your desktop filing system - you create a folder and inside, file away documents such as a Word document, PDF or an Excel spreadsheets. Inside Tractivity an Enquiry is your folder and activities are all documents and conversations you add to the folder.

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.

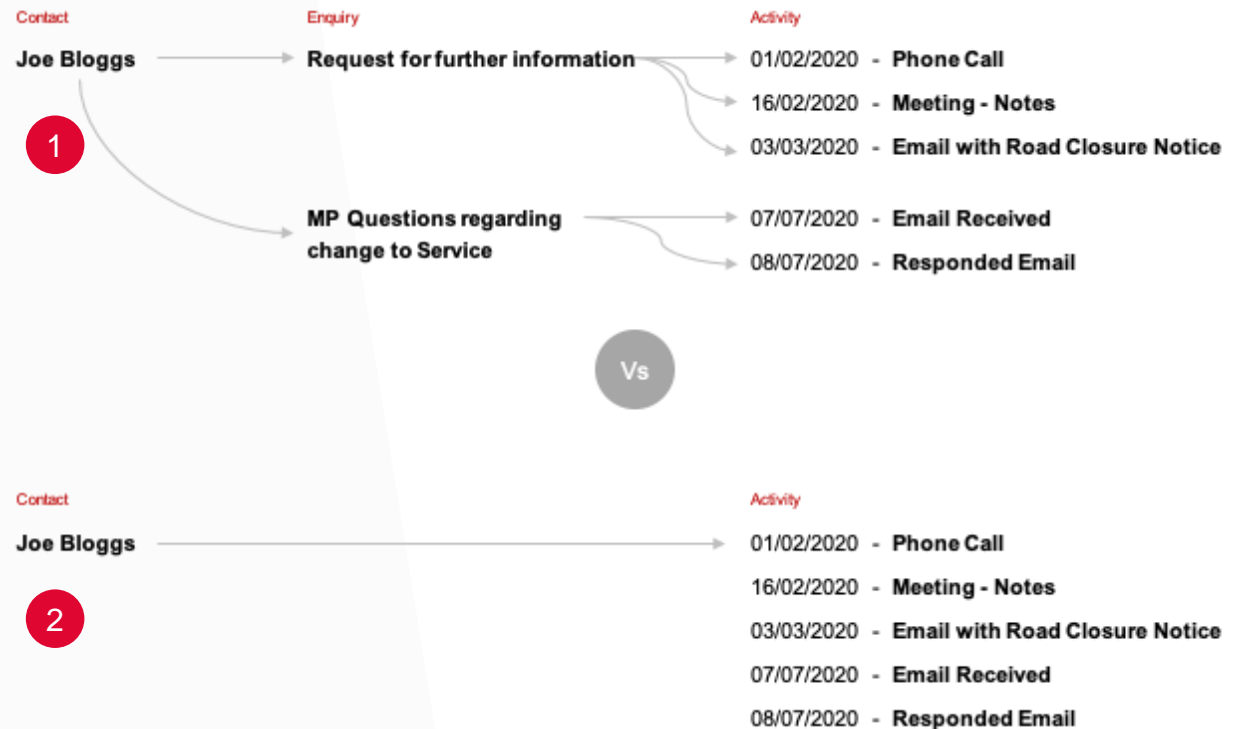


Always add an Enquiry against a Contact

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.



Always 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 every Contact, Organisation and Building inside Tractivity, just press **SUBMIT**.
3. Click on the Contact's name, highlighted as red clickable link.

Tractivity®

System Admin | Archive | My Settings | Log-out
Logged-in as: Tom Keep | Last log-in: 10:26 on 17/12/2019
You are currently viewing: Example Project

HOME

CALENDAR

BUILDINGS

ORGANISATIONS & CONTACTS

ENQUIRIES

ISSUES

SURVEYS

LAND PARCELS

LIBRARY

DISTRIBUTION LISTS

EVENTS

EMAIL

MAILSHOTS

REPORTS

WORKFLOW

Organisations & Contacts: Search

Add New:

- Add Contact
- Add Organisation

Search:

- Organisations & Contacts

1

Organisation Name

Organisation Account Handlers

Organisation Regions

Contact Name

Contact Created Date

Contact Project Categories

Organisation Categories

Organisation ID

Organisation Stakeholder Categories

Contact Stakeholder Categories

Contact Email

2

SUBMIT

SETTINGS

SAVE SEARCH

CLEAR

Contacts (6)

Organisations (3)

Buildings (2)

Saved Searches (0)

EXPORT RESULTS

	Contact	Organisation	Email	Telephone	Edit	Archive
<input type="checkbox"/>	Adams, Sarah	Exeter Council Pub Meeting Group	sarah@yahoo.co.uk	01782 716652	Edit	Archive
<input type="checkbox"/>	Adams, Jane		jane.adams@nhs.net		Edit	Archive
<input type="checkbox"/>	Michelle		michelle@yahoo.co.uk		Edit	Archive
<input type="checkbox"/>	Adamson, Vicky		vicky.adamson@tractivity.co.uk		Edit	Archive
<input type="checkbox"/>	Adamson, Victoria	Exeter Council Tractivity Ltd	victoria.adamson@tractivity.co.uk	01629 815907	Edit	Archive
<input type="checkbox"/>	Stewart, Adam		adam.stewart1@nhs.net	0113 8435470	Edit	Archive

Filter by : All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 0 1 2 3 4 5 6 7 8 9

GENERATE ACTIVITY

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**.

Tractivity®

System Admin | Archive | My Settings | Log-out
Logged-in as: Tom Keep | Last log-in: 10:26 on 17/12/2019
You are currently viewing: Example Project

HOMECALENDARBUILDINGSORGANISATIONS & CONTACTSENQUIRIESISSUESSURVEYSLAND PARCELSLIBRARYDISTRIBUTION LISTS

EVENTSEMAILMAIL SHOTSREPORTSWORKFLOW

1

Organisations & Contacts: View Contact

2

Add New:

- Add Enquiry
- Add Contact Activity
- Add Deputy
- Add Survey Response
- Add Contact
- Add Address
- Add Organisation

Contact:

- View Contact
- Edit Contact
- Attach Organisations
- Link/Unlink Contacts
- Archive Contact

Communicate:

- Email Contact
- Text Contact

Print:

- Printable Version

Search:

- Organisations & Contacts

NameVicky AdamsonAdd Email

Organisation

Telephone

Emailvicky.adamson@tractivity.co.uk

MobilePlease enter in international format e.g. for the UK 447837437476 instead of 07837437476

Stakeholder Categories1. Non Statutory Stakeholder

Last EditedKeep, Tom - 23/05/2019

Quick Notes

Drag an email here or click to select

Full DetailsAddresses (0)Social MediaOrganisations (0)Enquiries (2)Activities (7)Activity Attachments (1)

Issues (2)Land Parcels (0)Events (0)Survey Responses (0)Mailshots (1)SMS Messages (0)Mapping

Contact ID2730Regions

Telephone 2Interests

Email 2Contact Categories

Age RangeProject Category

GenderContact PermittedPost
Email
Telephone
Fax

Ethnic GroupDistribution Lists
(Excluding postal distribution lists)All Contacts
Key Stakeholders
test 1
Customers
a

ReligionCreated ByKeep, Tom - 23/05/2019

Political Party

Employment Status

Position Held

Account Handler

Influence

Sub Projects

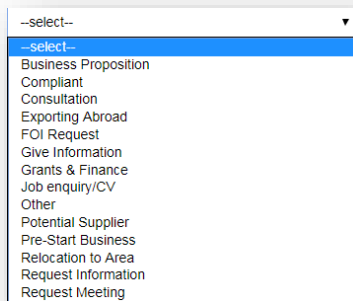
Adding an Enquiry

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:

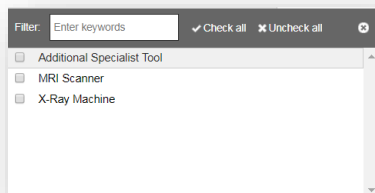
An **asterisk *** means the information is mandatory.

Drop-down menu options - select one answer:

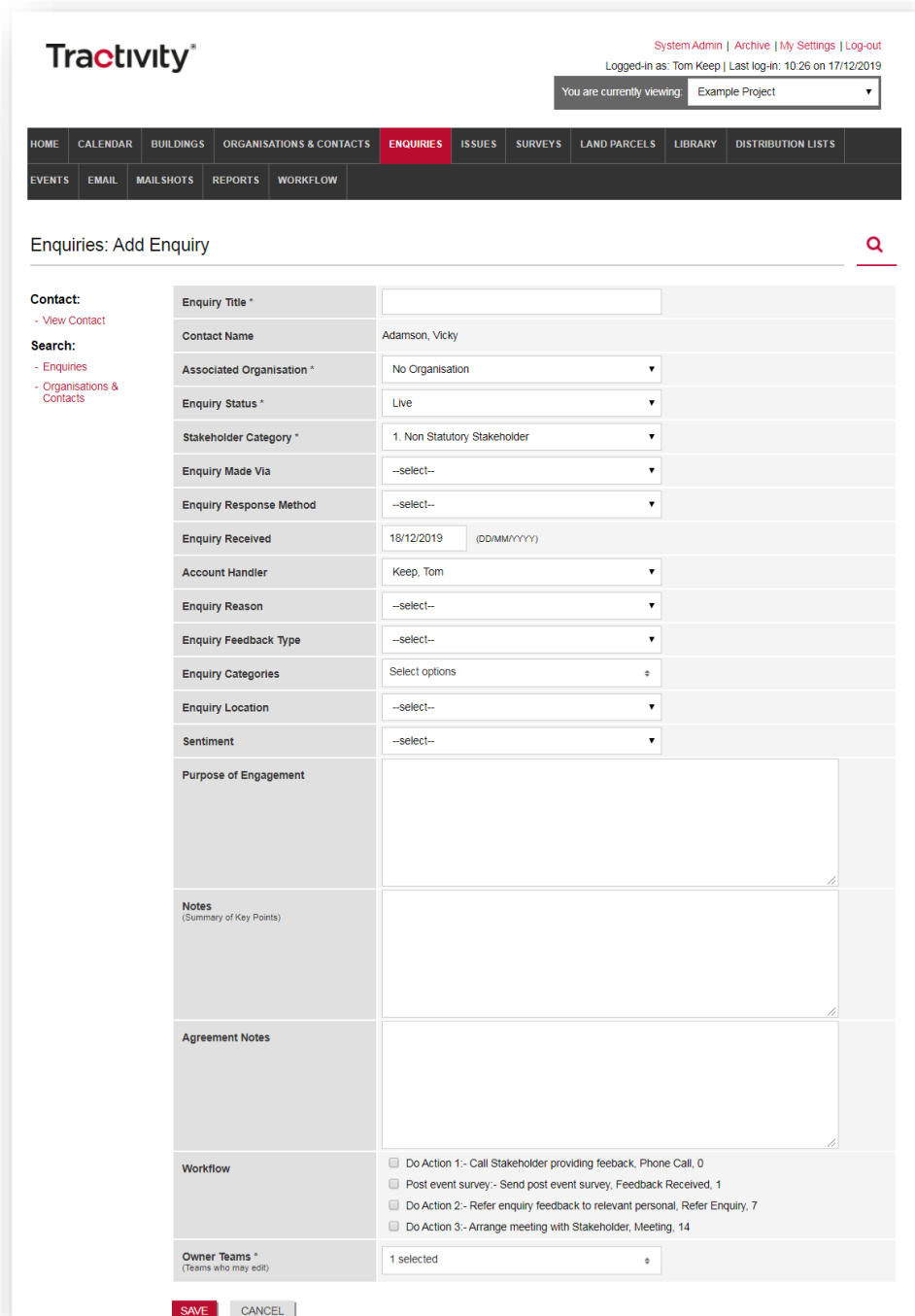


A screenshot of a web application's drop-down menu. The menu is open, showing a list of options. The top option is "--select--". Below it is another "--select--" option, which is highlighted in blue. The rest of the options are: Business Proposition, Compliant, Consultation, Exporting Abroad, FOI Request, Give Information, Grants & Finance, Job enquiry/CV, Other, Potential Supplier, Pre-Start Business, Relocation to Area, Request Information, and Request Meeting.

Checkboxes - you can select none, multiple or all.



A screenshot of a web application's checkbox selection interface. At the top, there is a "Filter:" label followed by a text input field containing "Enter keywords". To the right of the input field are three buttons: "Check all", "Uncheck all", and a small "x" icon. Below the input field is a list of three items, each with a checkbox: "Additional Specialist Tool", "MRI Scanner", and "X-Ray Machine".



A screenshot of the Tractivity web application's "Add Enquiry" form. The page header shows the Tractivity logo, user information (System Admin | Archive | My Settings | Log-out), and login details (Logged-in as: Tom Keep | Last log-in: 10:26 on 17/12/2019). A dropdown menu indicates "You are currently viewing: Example Project". The navigation bar includes links for HOME, CALENDAR, BUILDINGS, ORGANISATIONS & CONTACTS, ENQUIRIES (highlighted), ISSUES, SURVEYS, LAND PARCELS, LIBRARY, and DISTRIBUTION LISTS. Below the navigation bar, there are links for EVENTS, EMAIL, MAILSHOTS, REPORTS, and WORKFLOW. The main heading is "Enquiries: Add Enquiry". The form is divided into several sections: "Contact:" with a link to "View Contact"; "Search:" with links to "Enquiries", "Organisations & Contacts"; "Enquiry Title *"; "Contact Name" (Adamson, Vicky); "Associated Organisation *" (No Organisation); "Enquiry Status *" (Live); "Stakeholder Category *" (1. Non Statutory Stakeholder); "Enquiry Made Via" (--select--); "Enquiry Response Method" (--select--); "Enquiry Received" (18/12/2019) with a date picker; "Account Handler" (Keep, Tom); "Enquiry Reason" (--select--); "Enquiry Feedback Type" (--select--); "Enquiry Categories" (Select options); "Enquiry Location" (--select--); "Sentiment" (--select--); "Purpose of Engagement" (a large text area); "Notes (Summary of Key Points)" (a large text area); "Agreement Notes" (a large text area); "Workflow" (a list of actions with checkboxes: "Do Action 1:- Call Stakeholder providing feedback, Phone Call, 0", "Post event survey - Send post event survey, Feedback Received, 1", "Do Action 2:- Refer enquiry feedback to relevant personal, Refer Enquiry, 7", "Do Action 3:- Arrange meeting with Stakeholder, Meeting, 14"); and "Owner Teams *" (1 selected). At the bottom, there are "SAVE" and "CANCEL" buttons.

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.

Step 1 of 1 - Enquiry Details

1	Enquiry Title/Ref *	Noise
	Contact Name	Abbey, Ron
2	Associated Organisation *	Merseytravel Authority
3	Buildings	Select options
4	Enquiry Status *	Live
5	Stakeholder Category *	4. Other
6	Enquiry Made Via *	--select--
	Enquiry Response Method	--select--
7	Enquiry Received *	13/12/2017 (DD/MM/YYYY)
	Account Handler *	Harrop, Craig

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?

1	Enquiry Reason	Give Information ▼
2	Enquiry Feedback Type	Informal ▼
	Enquiry Categories	Select options ⚙
	Enquiry Location	--select-- ▼
3	Sentiment	Neutral ▼

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.

1	Purpose of Engagement	What is the purpose of your Engagement - remember to write an overview of the folder. Not just your first interaction
2	Notes (Summary of Key Points)	add further detail here - can update as you progress
3	Agreement Notes	at the end you can update this box - to show the outcome
	Workflow	No Workflow item(s) have been created. These can be set up in 'System Settings'
4	Owner Teams * (Teams who may edit)	2 selected

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**

Tractivity®

System Admin | Archive | My Settings | Log-out
Logged-in as: Tom Keep | Last log-in: 10:26 on 17/12/2019

You are currently viewing: Example Project

HOME | CALENDAR | BUILDINGS | ORGANISATIONS & CONTACTS | **ENQUIRIES** | ISSUES | SURVEYS | LAND PARCELS | LIBRARY | DISTRIBUTION LISTS

EVENTS | EMAIL | MAILSHOTS | REPORTS | WORKFLOW

Enquiries: View Enquiry

Add New:

- Add Enquiry Activity

Enquiry:

- View Enquiry
- Edit Enquiry
- Clone Enquiry
- Attach Associated Contacts
- Refer Enquiry
- Reassign Enquiry
- Link Associated Event
- Archive Enquiry

Communicate:

- Email Contact
- Email Enquiry Details

Print:

- Printable Version

Search:

- Enquiries
- Organisations & Contacts

Enquiry Title

Noise

Contact Name

Adamson, Vicky

Associated Organisation

No Organisation

Stakeholder Category

1. Non Statutory Stakeholder

Enquiry Status

Live


Enquiry Received

20/09/2019

Account Handler

Adamson, Vicky

Add Email


Drag an email here
or click to select

Full Details

Activities (1)Activity Attachments (1)Issues (2)Associated Contacts (0)Mapping

Enquiry ID

73

Enquiry Made Via

Enquiry Response Method

Enquiry Reason

Consultation

Enquiry Feedback Type

Enquiry Categories

Enquiry Location

Sentiment

Created

Adamson, Vicky - 20/09/2019

Last Edited

Adamson, Vicky - 20/09/2019

Owner Teams
(Teams who may edit)

Example Project: Engagement Team (Default Team)
Example Project: Adamson, Vicky

Associated Event

No Event

Purpose of Engagement

Notes
(Summary of Key Points)

Agreement Notes

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.

Tractivity®

System Admin | Archive | My Settings | Log-out
Logged-in as: Tom Keep | Last log-in: 10:26 on 17/12/2019
You are currently viewing: Example Project

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

Enquiries: View Enquiry

1

Add New:

- Add Enquiry Activity

Enquiry:

- View Enquiry
- Edit Enquiry
- Clone Enquiry
- Attach Associated Contacts
- Refer Enquiry
- Reassign Enquiry
- Link Associated Event
- Archive Enquiry

Communicate:

- Email Contact
- Email Enquiry Details

Print:

- Printable Version

Search:

- Enquiries
- Organisations & Contacts

Enquiry Title	Noise		Add Email
Contact Name	Adamson, Vicky		 Drag an email here or click to select
Associated Organisation	No Organisation		
Stakeholder Category	1. Non Statutory Stakeholder		
Enquiry Status	Live		
Enquiry Received	20/09/2019		
Account Handler	Adamson, Vicky		

Full Details | **Activities (1)** | Activity Attachments (1) | Issues (2) | Associated Contacts (0) | Mapping

Enquiry ID	73	Created	Adamson, Vicky - 20/09/2019
Enquiry Made Via		Last Edited	Adamson, Vicky - 20/09/2019
Enquiry Response Method		Owner Teams (Teams who may edit)	Example Project: Engagement Team (Default Team) Example Project: Adamson, Vicky
Enquiry Reason	Consultation		
Enquiry Feedback Type			
Enquiry Categories			
Enquiry Location			
Sentiment			
Associated Event	No Event		
Purpose of Engagement			
Notes (Summary of Key Points)			
Agreement Notes			

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.

1	Title *	
2	Activity Type *	Phone Call ▼
3	Status *	Completed ▼
4	Sub Project	Consultation A ▼
5	Stakeholder Category	1. Non Statutory Stakeholder ▼
6	Notes	Discussed the issues around the level of communication received not received any form of communication.
7	Agreement Notes *	checked contact details - and will ensure all comm's are sent in fu Added to key distribution lists

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.

1	Related Contacts	Select options			
2	Allocated To Teams * (Teams who may view the activity on their Home screen)	1 selected			
	Owner Teams * (Team who may edit)	2 selected			
3	Start Date * (dd/mm/yyyy)	23/03/2020	09	00	<input type="checkbox"/> All day event
	End Date * (dd/mm/yyyy)	23/03/2020	10	00	
	Add reminder?	<input type="checkbox"/>			

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.

Tractivity®

System Admin | Archive | My Settings | Log-out
Logged-in as: Tom Keep | Last log-in: 13:07 on 20/12/2019
You are currently viewing: Share Info

HOMECALENDARBUILDINGSORGANISATIONS & CONTACTSENQUIRIESISSUESSURVEYSLAND PARCELSLIBRARYDISTRIBUTION LISTS

EVENTSEMAILMAIL SHOTSREPORTSWORKFLOW

1

Enquiries: View Activity

2

Add New:


- Add Enquiry Activity

Activity:

- View Activity
- Edit Activity
- Clone Activity
- Reassign Activity
- Attach Library File
- Tag Issues
- Delete Enquiry Activity

Search:

- Enquiries
- Organisations & Contacts

Title *	Chase Outcome	<div>Add Attachment</div> <div> Drag a file here or click to select.</div>
Parent Enquiry	Compliant	
Parent Contact Name	Adams, Sarah T:01782 716652 M:447776 295591	
Activity Type	Courtesy Call	
Start Date/Time	30/12/2019	
End Date/Time	30/12/2019	
Status	Pending	
Notes	Please chase outcome for stakeholder and provide an update	

ADD ACTIVITY TO OUTLOOK

DetailsIssues (0)Attachments (0)

Associated Organisation	
Agreement Notes	
Sub Project *	Consultation A
Stakeholder Category	1. Non Statutory Stakeholder
Time spent on activity	
Related Contacts	
Allocated To Teams * <small>(Teams who may view the activity on their Home screen)</small>	Share Info: Keep, Tom
Owner Teams * <small>(Teams who may edit)</small>	Share Info: Share Info (Default Team) Share Info: Keep, Tom
Created	Keep, Tom - 23/12/2019
Last Edited	Keep, Tom - 23/12/2019
Reminders	Daily: Every Weekday (Start on 23/12/2019 - End after 7 occurrences)

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.

1

Enquiries: View Activity

Q

Add New:

- Add Enquiry Activity


Activity:

- View Activity
- Edit Activity
- Clone Activity
- Reassign Activity
- Attach Library File
- Tag Issues
- Delete Enquiry Activity

Search:

- Enquiries
- Organisations & Contacts

GO BACK

Title *	Arrange meeting with Stakeholder	<div>Add Attachment</div> <div>2</div> <div> Drag a file here or click to select.</div>
Parent Enquiry	Compliant	
Parent Contact Name	Adams, Sarah T:01782 716652 M:447776 295591	
Activity Type	Meeting	
Start Date/Time	26/12/2019 14:11	
End Date/Time	26/12/2019 14:11	
Status	Pending	
Notes	Arrange meeting with the stakeholder after 14 days	

ADD ACTIVITY TO OUTLOOK

Details

Issues (0)

Attachments (0)

Associated Organisation	
Agreement Notes	
Sub Project *	
Stakeholder Category	
Time spent on activity	
Related Contacts	
Allocated To Teams * <small>(Teams who may view the activity on their Home screen)</small>	Example Project: Engagement Team (Default Team)
Owner Teams * <small>(Teams who may edit)</small>	Example Project: Engagement Team (Default Team)
Created	Keep, Tom - 12/12/2019
Last Edited	Keep, Tom - 12/12/2019

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.

Enquiries: View Activity

Add New:

[GO BACK](#)


- Add Enquiry Activity

Activity:

- View Activity
- Edit Activity
- Clone Activity
- Reassign Activity
- Attach Library File
- Tag Issues
- Delete Enquiry Activity

Search:

- Enquiries

Title *	Arrange meeting with Stakeholder	<div>Add Attachment</div> <div> 3. Adding Enq... .pptx</div> <div>UPLOAD</div> <div>1</div>
Parent Enquiry	Compliant	
Parent Contact Name	Adams, Sarah T:01782 716652 M:447776 295591	
Activity Type	Meeting	
Start Date/Time	26/12/2019 14:11	
End Date/Time	26/12/2019 14:11	
Status	Pending	
Notes	Arrange meeting with the stakeholder after 14 days	<div>2</div>

Enquiries: View Activity

Add New:

[GO BACK](#)


- Add Enquiry Activity

Activity:

- View Activity
- Edit Activity
- Clone Activity
- Reassign Activity
- Attach Library File
- Tag Issues
- Delete Enquiry Activity

Search:

- Enquiries
- Organisations & Contacts

Title *	Arrange meeting with Stakeholder	<div>Add Attachment</div> <div> Done! Add Another?</div> <div>2</div>
Parent Enquiry	Compliant	
Parent Contact Name	Adams, Sarah T:01782 716652 M:447776 295591	
Activity Type	Meeting	
Start Date/Time	26/12/2019 14:11	
End Date/Time	26/12/2019 14:11	
Status	Pending	
Notes	Arrange meeting with the stakeholder after 14 days	
<div>ADD ACTIVITY TO OUTLOOK</div>		

Details Issues (0) Attachments (1)

File Name	Date	Type	Issues	Delete	View
3. Adding Enquiries -new Itm	23/12/2019	PowerPoint		Delete	View

Filter by : All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 0 1 2 3 4 5 6 7 8 9

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**.

1

Enquiries: View Enquiry

Add New:

- Add Enquiry Activity

Enquiry:

- View Enquiry
- Edit Enquiry
- Clone Enquiry
- Attach Associated Contacts
- Refer Enquiry
- Reassign Enquiry
- Link Associated Event
- Archive Enquiry

Communicate:

- Email Contact
- Email Enquiry Details
- Text Contact

Print:

- Printable Version

Search:

- Enquiries
- Organisations & Contacts

Enquiry Title

Compliant

Contact Name

Adams, Sarah
T:01782 716652
M:447776 295591

Associated Organisation

Pub Meeting Group

Buildings

26b Clifton Hill, Exeter, Devon, EX1 2DJ

Stakeholder Category

1. Non Statutory Stakeholder

Enquiry Status

Live

Closed

Live

✓

✕

Enquiry Received

Account Handler

Keep, Tom

Add Email

Drag an email here
or click to select

Full Details

Activities (5)

Activity Attachments (1)

Issues (0)

Associated Contacts (0)

Mapping

PREVIEW ACTIVITIES

Date	Activity/Action	Title	Status	Issues	Edit	Archive
26/12/2019	Meeting	Arrange meeting with Stakeholder	<input type="checkbox"/>	0	Edit	Archive
23/12/2019	Email Received	Using Office 365 on Windows 7	<input checked="" type="checkbox"/>	0	Edit	Archive
19/12/2019	Refer Enquiry	Refer enquiry feedback to relevant personal	<input type="checkbox"/>	0	Edit	Archive
13/12/2019	Feedback Received	Send post event survey	<input type="checkbox"/>	0	Edit	Archive



Vicky Adamson

Client Relationship Manager

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