Tractivity®

Creating Distribution Lists

Distribution Lists

Create as many distribution lists within Tractivity, as you wish. Giving you full control of which Organisations or Contact's you want to target

Create a Contact List

1. **Title,** try to be descriptive so that other users understand what the list covers from just reading the title.

2. **Type,** 99% of the time, distribution lists will be Contact List, for example contacting Vicky at Tractivity, rather than Tractivity as a Company.. .

3. **Format,** What method would you like to communicate, Email Plain Text (Email Module), Mailshot, Post , SMS or Telephone.

4. **Owners Teams,** as default All Users will be selected, allowing all users to add, amend and refresh your list.

Adding Your Contacts or Organisations

This screen provides you with a full overview of all your attached Organisations **or** contacts, including; Recipients , Invalid Recipients, Unsubscribed & Activities

On the left -hand menu you will see the option to **Add Contacts to List.**

Search Tractivity

A search screen appears within every part of your system, so (hopefully) be familiar.

Inside the search screen, **SETTINGS** allows you to add a range of search boxes. You can search for any information you record on the **ADD CONTACT Screen.**

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Distribution Lists: Attach Contact Recipients

Distribution List:

- View Distribution List

Distribution Lists:

- All Distribution Lists

Contact Name		
Contact Created Date		to
Contact Account Handler	Select options	
Organisation Name		
Organisation Sectors	Select options	

Contact Stakeholder Categories	Select options
Contact Categories	Select options
Organisation Categories	Select options
Organisation Account Handlers	Select options

SUBMIT   SETTINGS   CLEAR

1

Search Settings

Record Type: Contact ▼

Search fields to display

Building Relationship	Add ●
Deputy Email Address	Add ●
Deputy Name	Add ●
Deputy Position	Add ●
Deputy Telephone	Add ●
Distribution List	Add ●
Email	Add ●
Email 2	Add ●
Email Status	Add ●
Employment Status	Add ●
Ethnic Group	Add ●

Selected fields

Name		
Stakeholder Categories		Remove ✖
Created Date		Remove ✖
Categories		Remove ✖
Account Handler		Remove ✖
Age Range		Remove ✖

CONFIRM   CANCEL

Search Criteria

My Example - All Statutory Stakeholder's.

1. The field that records whether a contact is Statutory needs to be added to the search screen. Select Statutory Stakeholder,

2. Click, **SUMBIT.**

Remember; You can target a more specific groups by using multiple search parameters.

Select Your Contacts

All contacts that meet your search parameters will now be displayed on your screen.

1. Select all the listed contacts by ticking the master tick box (found within the grey header) or select individuals by ticking their specific box.

2. Click **Attach Contacts** to temporarily save the contacts to your distribution list.

3. Press **OK** once you are completely happy with the number of contacts attached to your list.

Contacts (9)

	Contact	Company	Email ⚙	Contact Per.. ⚙	Attach
☐	Aaronson, Amanda	TEST 123 Ltd	a.aa@test123ltd.com (Invalid)	Email; Telephone	
☐	Adams, Aaron	TEST 123 Ltd		Post; Email; Telephone	
☐	adamson, victoria	Tractivity	victoria.adamson@tractivity.co.uk	Post; Email; Telephone	Attach
☐	Dodd, Peter 🌿	Acme Limited		Post; Email; Telephone	
☐	Dowell, Corinne	Cozza's Angels		Post; Email; Telephone	
☐	Hepton, Sally	BENTLEY MOTORS LIMITED	sally.hepton@bentley.co.uk	Post; Email; Telephone	Attach
☐	Morris, Kirsty	Kirsty		Post; Email; Telephone	
☐	O'Neill, M	3663 First For Food Service	harlowdepot@3663.co.uk	Post; Email; Telephone	Attach
☐	Test, Jamie	Tractivity Testing LTD		Post; Email; Telephone	

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

ATTACH CONTACTS

Attached Contacts

No Contacts to display

OK   **CANCEL**

Distribution Lists

You can add anyone to a distribution list. However, if they are not subscribed or don't have a valid email address you will not be able to send t mass communication moving forward.

If you have selected to create a Plain-Text Distribution List, Subscription Preferences (GDPR) is not taken into account.

1. **Recipients –** All valid and subscribed recipients

2. **Invalid Recipients** – can mean one of the following three;

   • Email address is missing

   • Email address is invalid

   • *Email Permission* setting is set to 'Not Permitted'.

3. **Not Subscribed** – any recipient who's *Subscription Preference* is **No Response** or **Unsubscribed.**

Overview

Congratulations, You have now completed your distribution list!

Use your distribution list direct through your Tractivity, from Events & Mailshot Module.

Adding & Updating New Contacts

Distribution List do not automatically Update!

You can add new contacts to the distributions list in to ways;

1) Research and check no new contacts have been added to the system, before using the list.

2) Add contacts to a distribution list as they are added to the system.

Distribution Lists:View Distribution List

Distribution Lists:
- All Distribution Lists
- My Distribution Lists

Entity Lists:
- Create Organisations List
- Create Contacts List
- Add Contacts to Distribution List
- View Distribution List
- Edit Distribution List
- Archive Distribution List
- Email Distribution List
- Export as CSV File
- Add Activity

Title	Non Statutory Stakeholder	Format	Email
Type	Contact	Owner Teams (Teams who may edit)	East Anglia: Consultation Team East Anglia: Weinbren, Jamie
Created	Weinbren, Jamie - 14/12/2017		
Last Edited	Weinbren, Jamie - 14/12/2017		

Recipients (10) | Invalid Recipients (0) | Unsubscribed (0) | Activities (0) | Newsletters (0)

Contact	Organisation	Email	Contact Per..	Email 2	Remove
Leadfoot, Martin	Industrial Turbines PLC Keep Writing Limited 1	test@tractivity.co.uk	Post; Email; Telephone		Remove
Keep, Elaine	Bread & Butties Catering Keep Writing Limited 1	elaine@iandm.com	Post; Email; Telephone; SMS	thomas.keep@re-systems.co.uk	Remove
test,	test	t@t.com	Post; Email; Telephone; SMS	g@gg.vom	Remove

Option 1 - Re-search for New Contacts

1. Click on the title of your Distribution List name (red clickable link)

2. Select **Add Contact to List**

3. Tractivity wont remember your search parameters, you will be required to define your search criteria again.

4. .If no contacts appear when you click Submit – no new contacts have been added. Alternativity, add any contacts that appear here.

Option 2 – Adding a New Contact to Tractivity

The easiest way to add new contacts to a pre-existing distribution list, is to add them to your desired distribution list(s), when creating a new Contact or Organisations.

Vicky Adamson

Client Relationship Manager

Tractivity®

Systems House, Deepdale Business Park,

Bakewell, Derbyshire, DE45 1GT

www.tractivity.co.uk