



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

Tractivity®

System Admin | [Archive](#) | [My Settings](#) | [Log-out](#)

Logged-in as: Vicky Adamson | Last log-in: 14/06 on 19/09/2019

You are currently viewing:

Example Project

HOME

CALENDAR

BUILDINGS

ORGANISATIONS & CONTACTS

ENQUIRIES

ISSUES

SURVEYS

LAND PARCELS

LIBRARY

DISTRIBUTION LISTS

EVENTS

EMAIL

MAILSHOTS

REPORTS

WORKFLOW

Distribution Lists: All Distribution Lists

Add New:

- Add Distribution List

Distribution Lists:

- All Distribution Lists

Title	Format	Type	Created By	Created Date	Edit	Archive
All Contact Email GDPR Subscribed	Email (Plain-Text)	Contact	Keep, Tom	27/06/2019	Edit	Archive
All Contacts	Email (Plain-Text)	Contact	Keep, Tom	27/06/2019	Edit	Archive
All Mandatory Stakeholders	Mailshot	Contact	Adamson, Vicky	18/10/2019	Edit	Archive
Bakewell Theme Park / Brochure Send	Post	Contact	Rutter, Mark	09/09/2019	Edit	Archive
Billington Rd closure	Mailshot	Contact	Keep, Tom	27/06/2019	Edit	Archive
Christmas Embargo	Post	Contact	Keep, Tom	13/02/2019	Edit	Archive
Confidential Contacts	Email (Plain-Text)	Contact	Rutter, Mark	18/03/2019	Edit	Archive
Customers	Mailshot	Contact	Adamson, Vicky	20/09/2019	Edit	Archive
Email List	Email (Plain-Text)	Contact	Keep, Tom	14/03/2019	Edit	Archive
Example Letter	Post	Contact	Rutter, Mark	14/12/2018	Edit	Archive
GP Mailing List	Mailshot	Contact	Rutter, Mark	20/09/2019	Edit	Archive
Important Notice	Mailshot	Contact	Adamson, Vicky	19/09/2019	Edit	Archive
Key Stakeholders	Mailshot	Contact	Keep, Tom	27/06/2019	Edit	Archive
Key Stakeholders (2)	Mailshot	Contact	Keep, Tom	27/06/2019	Edit	Archive
Peak Districts List	Mailshot	Contact	Rutter, Mark	04/05/2018	Edit	Archive

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.

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Logged-in as: Vicky Adamson | Last log-in: 14:06 on 19/09/2019
You are currently viewing: Example Project

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

Distribution Lists: Add Distribution List

Distribution Lists:

- All Distribution Lists

1

Title*

All Statutory Stakeholders

2

Type *

Contact

3

Format*

Email (Plain-Text)

4

Owner Team/s*
(Teams who may edit)

2 selected

SAVE

CANCEL

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**.

Distribution Lists: View Contact Distribution List



Add New:

1

- Add Contacts to List
- Add Activity
- Add Distribution List

Distribution List:

- View Distribution List
- Edit Distribution List
- Archive Distribution List

Distribution Lists:

- All Distribution Lists

Title	All Statutory Stakeholders	Format	Email (Plain-Text)
Type	Contact	Owner Teams (Teams who may edit)	Example Project: Engagement Team (Default Team) Example Project: Adamson, Vicky
Created	Adamson, Vicky - 17/02/2020		
Last Edited	Adamson, Vicky - 17/02/2020		

Recipients (0)

Invalid Recipients (0)

Activities (0)

No Contacts to display

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**.

Distribution Lists: Attach Contact Recipients

Distribution List:

[- View Distribution List](#)

Distribution Lists:

[- All Distribution Lists](#)

Contact Name	<input type="text"/>	Contact Stakeholder Categories	Select options
Contact Created Date	<input type="text"/> to <input type="text"/>	Contact Categories	Select options
Contact Account Handler	Select options	Organisation Categories	Select options
Organisation Name	<input type="text"/>	Organisation Account Handlers	Select options
Organisation Sectors	Select options		
<input type="button" value="SUBMIT"/>		<input type="button" value="SETTINGS"/>	
		<input type="button" value="CLEAR"/>	

1

Search Settings

Record Type:

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

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.

Distribution List:

- View Distribution List

Distribution Lists:

- All Distribution Lists

Contact Name	<input type="text"/>	Contact Stakeholder Categories	1 selected
Contact Created Date	<input type="text"/> to <input type="text"/>	Contact Categories	Select options
Contact Account Handler	Select options	Organisation Categories	Select options
Organisation Name	<input type="text"/>	Organisation Account Handlers	Select options
Organisation Sectors	Select options		
<input type="button" value="SUBMIT"/> <input type="button" value="SETTINGS"/> <input type="button" value="SAVE SEARCH"/> <input type="button" value="CLEAR"/>			

Contacts (16)

<input type="checkbox"/>	Contact	Organisation	Email	Contact Per..	Attach
<input type="checkbox"/>	Adams, Sarah	Exeter Council Pub Meeting Group	sarah@yahoo.co.uk	Post Email Telephone SMS	Attach
<input type="checkbox"/>	Berkamp, Peta	NHS Wakefield CCG (Comms Dept.)	peta@wakefield.nhs.uk	Post Email Telephone SMS	Attach
<input type="checkbox"/>	bloggs, joe		joe.bloggs@trac.com	Post Email Telephone SMS	Attach
<input type="checkbox"/>	Bradshaw, Ben	Exeter Council	bradshawb@parliament.uk	Post Email Telephone SMS	Attach
<input type="checkbox"/>	Burchall, Shane		shane.b@gmail.com	Post Email Telephone SMS	Attach
<input type="checkbox"/>	Colburn, Elliot	London Borough of Sutton	elliott.colburn@sutton.gov.uk	Post Email Telephone SMS	Attach
<input type="checkbox"/>	Davies, Simon	NHS Wakefield CCG (Engagement Dept.)	simon@wakefield.nhs.uk	Post Email Telephone SMS	Attach
<input type="checkbox"/>	G, Ali		Ali.g@c4.com	Post Email Telephone SMS	Attach
<input type="checkbox"/>	Jane Parker, sarah		s.jane@trac.com	Post Email Telephone SMS	Attach
<input type="checkbox"/>	Jones, Sarah	NHS Wakefield CCG (Engagement Dept.)	sarah@wakefield.nhs.uk	Post Email Telephone SMS	Attach
<input type="checkbox"/>	Peters, Martin	NHS Wakefield CCG (HR Dept.)	martin@wakefield.nhs.uk	Post Email Telephone SMS	Attach
<input type="checkbox"/>	Rutter, Mark	Falkland Ltd	mark.rutter@cwt.co.uk	Post Email Telephone SMS	Attach

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)

1

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

2

Attached Contacts

No Contacts to display

OK

CANCEL

3

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 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**.

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 Te East Anglia: Weinbren, Jam
Created	Weinbren, Jamie - 14/12/2017		
Last Edited	Weinbren, Jamie - 14/12/2017		

1

2

3

Recipients (10)	Invalid Recipients (0)	Unsubscribed (0)	Activities (0)	Newsletters (0)
Contact	Organisation	Email ⚙	Contact Per.. ⚙	Email 2 ⚙
Leadfoot, Martin	Industrial Turbines PLC Keep Writing Limited 1	test@tractivity.co.uk	Post; Email; Telephone	
Keep, Elaine	Bread & Butties Catering Keep Writing Limited 1	elaine@iandm.com	Post; Email; Telephone; SMS	thomas.keep@re- systems.co.uk
test,	test	t@t.com	Post; Email; Telephone; SMS	g@gg.vom

Overview

Congratulations, You have now completed your distribution list!

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

[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

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.

Tractivity

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You are currently viewing: Example Project

HOMECALENDARBUILDINGSORGANISATIONS & CONTACTSENQUIRIESISSUESSURVEYSLAND PARCELSLIBRARYDISTRIBUTION LISTS

EVENTSEMAILMAILSHOTREPORTSWORKFLOW

Distribution Lists: All Distribution Lists

Add New:
- [Add Distribution List](#)

Distribution Lists:
- [All Distribution Lists](#)

Title	Format	Type	Created By	Created Date	Edit	Archive
All Contact Email GDPR Subscribed	Email (Plain-Text)	Contact	Keep, Tom	27/06/2019	Edit	Archive
All Contacts	Email (Plain-Text)	Contact	Keep, Tom	27/06/2019	Edit	Archive
All Mandatory Stakeholders	Mailshot	Contact	Adamson, Vicky	18/10/2019	Edit	Archive
Bakewell Theme Park / Brochure Send	Post	Contact	Rutter, Mark	09/09/2019	Edit	Archive
Billington Rd closure	Mailshot	Contact	Keep, Tom	27/06/2019	Edit	Archive
Christmas Embargo	Post	Contact	Keep, Tom	13/02/2019	Edit	Archive
Confidential Contacts	Email (Plain-Text)	Contact	Rutter, Mark	18/03/2019	Edit	Archive
Customers	Mailshot	Contact	Adamson, Vicky	20/09/2019	Edit	Archive
Email List	Email (Plain-Text)	Contact	Keep, Tom	14/03/2019	Edit	Archive
Example Letter	Post	Contact	Rutter, Mark	14/12/2018	Edit	Archive
GP Mailing List	Mailshot	Contact	Rutter, Mark	20/09/2019	Edit	Archive
Important Notice	Mailshot	Contact	Adamson, Vicky	19/09/2019	Edit	Archive
Key Stakeholders	Mailshot	Contact	Keep, Tom	27/06/2019	Edit	Archive
Key Stakeholders (2)	Mailshot	Contact	Keep, Tom	27/06/2019	Edit	Archive
Peak Districts List	Mailshot	Contact	Rutter, Mark	04/05/2018	Edit	Archive

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.

Companies: Add Contact

Display:

- All Companies
- My Companies
- All Contacts
- My Contacts

Company:

- View Company

Contact:

- Add Contact

Mint:

- Add Mint Company

Search:

- Search

COMPANY INFORMATION

Parent Company Tractivity Limited

Main Contact (at Company) ☐

MAIN DETAILS

First Name Victoria

Last Name* Adamson

Title --select--

Position Held

Department

CONTACT INFORMATION

Has Alternate Address ☐

Telephone

Mobile

Email

DISTRIBUTION LISTS & CATEGORISATION

Contact Permitted

Distribution Lists

Filter: Enter keywords ☐ Check all ☒ Uncheck all

- ☐ Dundee City Council - Top 100
- ☐ Global Newsletter Sign-Ups
- ☐ Maidstone Contacts
- ☒ Manufacturing Sector
- ☐ MIDAS Contacts Sectors
- ☐ Newcastle Target List
- ☐ Newsletter Registration
- ☐ nora test

Select options



Vicky Adamson
Client Relationship Manager



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