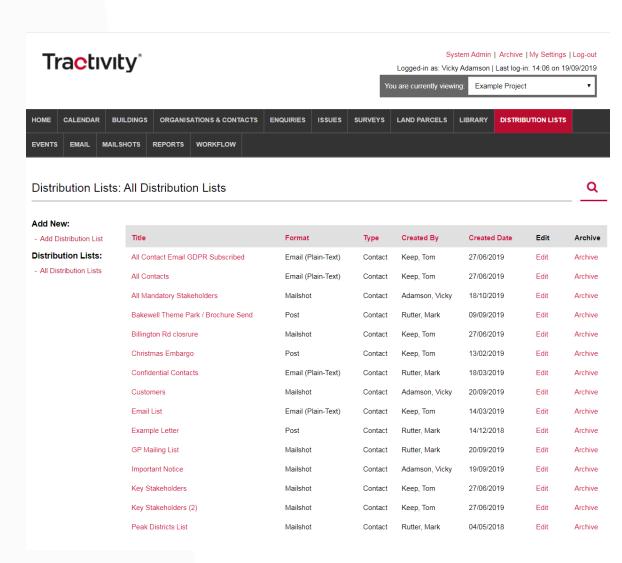
# **Tractivity**<sup>®</sup>

## **Creating Distribution Lists**

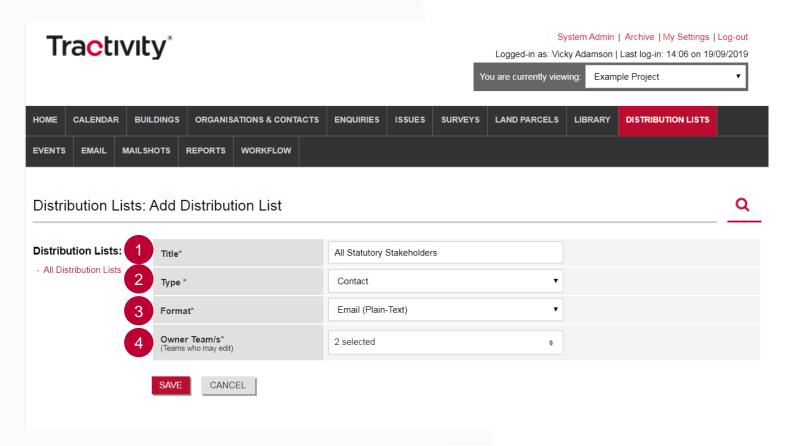
### **Distribution Lists**

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

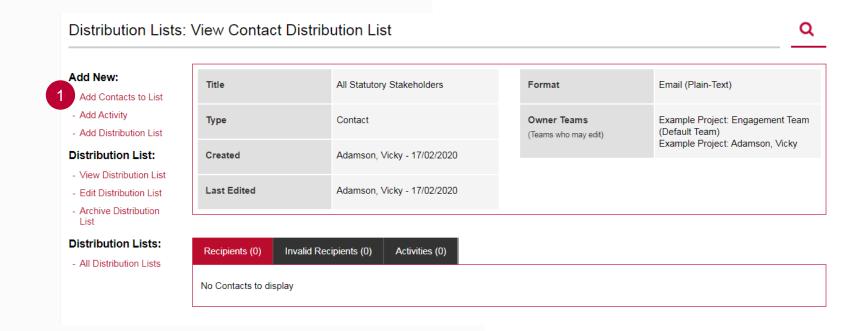
- 1. **Title**, try to be descriptive so that other users understand what the list covers from just reading the title.
- 2. Type, 99% of the time, distribution lists will be Contact List, for example contacting Vicky at Tractivity, rather than Tractivity as a Company...
- 3. Format, What method would 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.

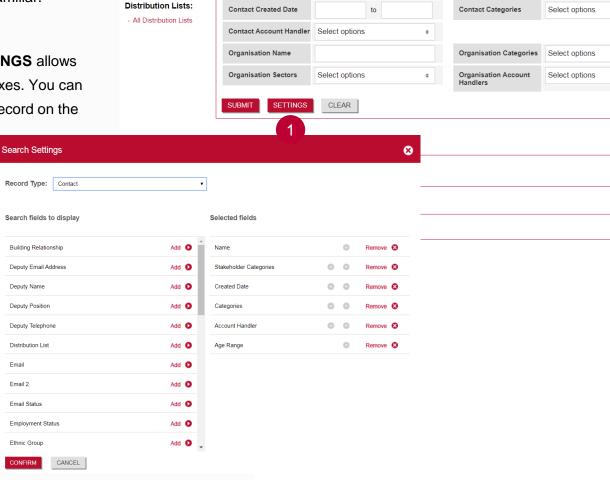


## **Search Tractivity**

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.



Distribution Lists: Attach Contact Recipients

Contact Name

Distribution List:

- View Distribution List

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\$

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Contact Stakeholder

Categories

Select options

## **Search Criteria**

My Example - All Statutory Stakeholder's.

- 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.

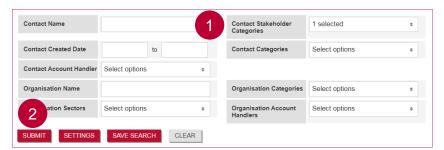
#### Distribution Lists: Attach Contact Recipients

#### Distribution List:

- View Distribution List

#### Distribution Lists:

- All Distribution Lists



#### Contacts (16)

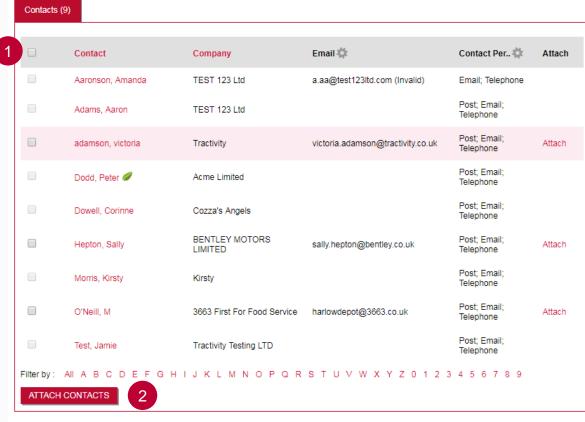
์จ

3	Contact	Organisation	Email 🌣	Contact Per	Attach
	Adams, Sarah	Exeter Council Pub Meeting Group	sarah@yahoo.co.uk	Post Email Telephone SMS	Attach
	Berkamp, Peta	NHS Wakefield CCG (Comms Dept.)	peta@wakefield.nhs.uk	Post Email Telephone SMS	Attach
	bloggs, joe		joe.bloggs@trac.com	Post Email Telephone SMS	Attach
	Bradshaw, Ben	Exeter Council	bradshawb@parliament.uk	Post Email Telephone SMS	Attach
	Burchall, Shane		shane.b@gmail.com	Post Email Telephone SMS	Attach
	Colburn, Elliot	London Borough of Sutton	elliot.colburn@sutton.gov.uk	Post Email Telephone SMS	Attach
	Davies, Simon	NHS Wakefield CCG (Engagement Dept.)	simon@wakefield.nhs.uk	Post Email Telephone SMS	Attach
	G, Ali		Ali.g@c4.com	Post Email Telephone SMS	Attach
	Jane Parker, sarah		s.jane@trac.com	Post Email Telephone SMS	Attach
	Jones, Sarah	NHS Wakefield CCG (Engagement Dept.)	sarah@wakefield.nhs.uk	Post Email Telephone SMS	Attach
	Peters, Martin	NHS Wakefield CCG (HR Dept.)	martin@wakefield.nhs.uk	Post Email Telephone SMS	Attach
	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.

- Select all the listed contacts by ticking the master tick box (found within the grey header) or select individuals by ticking their specific box.
- Click Attach Contacts to temporarily save the contacts to your distribution list.
- Press **OK** once you are completely happy with the number of contacts attached to your list.



#### **Attached Contacts**

No Contacts to display



CANCEL



### **Distribution Lists**

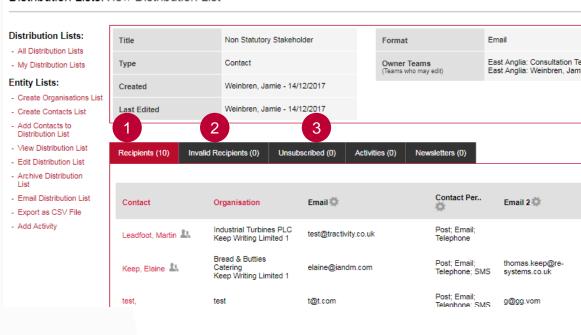
You can add anyone to a distribution list.

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.

- Recipients All valid and subscribed recipients
- 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'.
- Not Subscribed any recipient who's Subscription Preference is No Response or Unsubscribed.

#### Distribution Lists: View Distribution List



## **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
- Email Distribution List
- Export as CSV File
- Add Activity



Recipients (10)	Invalid Recipients (0)	Unsubscribed (0)	Activities (0)	Newsletters (0)		
Contact	Organisation	Email 🕸		Contact Per	Email 2 🔯	Remove
Leadfoot, Martin	Industrial Turbine Keep Writing Lin		vity.co.uk	Post; Email; Telephone		Remove
Keep, Elaine 👢	Bread & Butties Catering Keep Writing Lin	elaine@ian nited 1	dm.com	Post; Email; Telephone; S		Remove
test,	test	t@t.com		Post; Email;	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;

- Research and check no new contacts have been added to the system, before using the list.
- 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:**

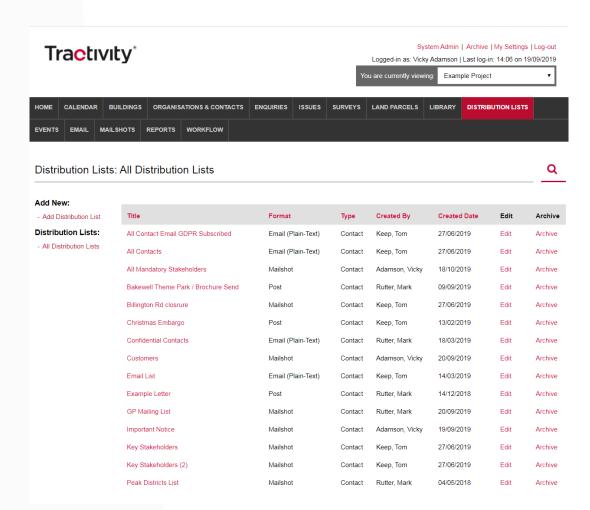
- Create Organisations List
- Create Contacts List
- Add Contacts to Distribution List
- View Distribution List
- Edit Distribution List
- Archive Distribution
- Email Distribution List
- Export as CSV File
- Add Activity



recipients (10)	invalid Necipients (0)	Offsubscribed (U)	Acuvides (U)	Newsiellers (U)		
Contact	Organisation	Email 🗱		Contact Per	Email 2	Remov
Leadfoot, Martin	Industrial Turbines Keep Writing Limite		ity.co.uk	Post; Email; Telephone		Remov
Keep, Elaine	Bread & Butties Catering Keep Writing Limite	elaine@iand ed 1	lm.com	Post; Email; Telephone; SMS	thomas.keep@re- systems.co.uk	Remov
test,	test	t@t.com		Post; Email;	g@gg.vom	Remov

## **Option 1 - Re-search for New Contacts**

- Click on the title of your Distribution List name (red clickable link)
- Select Add Contact to List
- Tractivity wont remember your search parameters, you will be required to define your search criteria again.
- 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**

Companies: Add Contact

The easiest way to add new contacts to a preexisting distribution list, is to add them to your desired distribution list(s), when creating a new Contact or Organisations. Display: COMPANY INFORMATION - All Companies Tractivity Limited - My Companies **Parent Company** - All Contacts Main Contact (at Company) - My Contacts Company: MAIN DETAILS - View Company First Name Victoria Contact: - Add Contact Adamson Last Name\* Mint: --select--Title - Add Mint Company Search: Position Held - Search Department CONTACT INFORMATION Has Alternate Address Enter keywords Telephone Dunaee City Council - Top Tot Global Newsletter Sign-Ups Mobile Maidstone Contacts Email Manufacturing Sector MIDAS Contacts Sectors **DISTRIBUTION LISTS & CATEGORISAT**  Newcastel Target List Newsletter Registration Contact Permitted nora test Select options **Distribution Lists** 



Client Relationship Manager



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