

Tractivity[®]

**Getting started
with Tractivity**

Adding Stakeholders, Enquiries and Issues to Your System

Add Stakeholder ➡ Create Enquiry ➡ Add Activities ➡ Add Issues



Username:

Password:

[Forgot your password?](#)

1

LOG-IN

Access Your Account

Open your web browser and enter the URL provided by your system administrator and enter your unique username and password. The first time you login to the system, you'll be asked to create a new password.

1. Should you forget your password in the future, you can click the **Forgot your password?** link.

Home Screen & Navigation Bar

The home screen will be your base, and where you land each time you login into Tractivity.

1. A black navigation bar runs across the top of your screen, displaying all the different modules available inside Tractivity.
2. View today, overdue, upcoming and completed activities for your attention.
3. An Interactive dashboard, providing an overview of your system in a combination of charts, graphs and data grids.

The screenshot shows the Tractivity home screen. At the top right, there are links for System Admin, Support Hub, Archive, My Settings, and Log-out. Below these, it says 'Logged-in as: Vicky Adamson | Last log-in: 13:39 on 01/08/2019'. A dropdown menu shows 'You are currently viewing: Infrastructure Project'. A black navigation bar (callout 1) contains links for HOME, CALENDAR, BUILDINGS, ORGANISATIONS & CONTACTS, ENQUIRY/FEEDBACK, ISSUES, SURVEYS, LAND PARCELS, LIBRARY, DISTRIBUTION LISTS, EVENTS, EMAIL, MAILSHOTS, REPORTS, and WORKFLOW. Below the navigation bar, it says 'Welcome to Tractivity: 01 August 2019' with a search icon (callout 2). A summary bar shows 'Today's Activities (0)', 'Reminders (0)', 'Smartinbox (0)', and 'Completed (0)'. A dropdown menu for 'Display activities for:' is set to 'Today', and it says 'No Activities to display.' Below this is a 'Key' section with color-coded boxes for Organisation, SmartMailer, Enquiry, Land Parcel, Contact, Building, Calendar, Event, and Distribution List. The dashboard (callout 3) features four summary cards: 'Organisations' (0), 'Contacts' (20), 'Enquiries' (0), and 'Activities' (53). To the right is an 'Upcoming Events' section showing '25/09/2018 Focus Group Session' with '0 / 0' confirmed/invited. At the bottom, there are three sections: 'Top 5 Issues Raised' (a table with 5 rows), 'Activities Created' (a line chart for the last 10 weeks), and 'Responses By Survey' (a horizontal bar chart for 6 most recent surveys).

Issue	Total
Partner Dispute / Operational	0
Partner Dispute / Engagement	0
Polution / bikes	0
Partner Dispute / Strategic	0
Partner Dispute / Communications	0

Survey	Responses
Pet Survey	4
Product Survey	1
Healthcare Survey	2
Country Park Feedback	4
Car Survey	3
Client Feedback Survey	3

The Left-Hand-Menu & Page Title

1. Every page has a title; this tells you where you are, for example; We are inside the **Organisations & Contacts Module**, viewing the **Search Screen**.
2. The Left-Hand-Menu (LHM) tells you what you can do, from the screen that you are in.

Top Tip:
all red text is
clickable

The screenshot displays the Tractivity web application interface. At the top, the Tractivity logo is on the left, and user information is on the right, including links for System Admin, Archive, My Settings, and Log-out, along with login details for Tom Keep. A dropdown menu shows the current view is 'Example Project'. Below this is a navigation bar with tabs for HOME, CALENDAR, BUILDINGS, **ORGANISATIONS & CONTACTS**, ENQUIRIES, ISSUES, SURVEYS, LAND PARCELS, LIBRARY, and DISTRIBUTION LISTS. A secondary row of tabs includes EVENTS, EMAIL, MAILSHOTS, REPORTS, and WORKFLOW. The main content area is titled '1 Organisations & Contacts: Search' with a search icon. On the left, a '2 Add New:' section lists '- Add Contact' and '- Add Organisation'. Below that, a 'Search:' section lists '- Organisations & Contacts'. The search form contains fields for Organisation Name, Organisation Account Handlers, Organisation Regions, Contact Name, Contact Created Date (with a date range selector), Contact Project Categories, Organisation Categories, Organisation ID, Organisation Stakeholder Categories, Contact Stakeholder Categories, and Contact Email. At the bottom of the form are SUBMIT, SETTINGS, and CLEAR buttons. Below the form is a filter bar with tabs for Contacts, **Organisations**, Buildings, and Saved Searches (0). The main display area shows 'No Contacts to display'.

Getting Help

Built inside your system is a support hub, you can access this support hub in two ways;

1. Click **Help** on any Tractivity screen, the icon will always be displayed in the bottom right corner.
2. Or click **Support Hub** for additional help including, tutorial videos, upcoming webinars and help guides.

The screenshot displays the Tractivity system interface. At the top, the Tractivity logo is on the left, and navigation links (System Admin | Support Hub | Archive | My Settings | Log-out) and login information (Logged-in as: Mark Rutter | Last log-in: 11:44 on 14/08/2019) are on the right. A red circle with the number '2' highlights the 'Support Hub' link. Below the navigation bar is a dark menu with various options like HOME, CALENDAR, BUILDINGS, etc. The main content area shows a welcome message, a search bar, and a section for 'Today's Activities' with a dropdown menu and a key for different activity types. At the bottom, there are four summary boxes for Organisations (20), Contacts (64), Enquiries (21), and Activities (219). A large box on the right indicates 'No Data Qualified'. A red circle with the number '1' highlights the 'Help' icon in the bottom right corner of the interface.

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System Admin | Support Hub | Archive | My Settings | Log-out

Logged-in as: Mark Rutter | Last log-in: 11:44 on 14/08/2019

HOME | CALENDAR | BUILDINGS | ORGANISATIONS & CONTACTS | ENQUIRY/FEEDBACK | ISSUES | SURVEYS | LAND PARCELS | LIBRARY

DISTRIBUTION LISTS | EVENTS | EMAIL | MAIL SHOTS | REPORTS

Welcome to Tractivity: 14 August 2019

Today's Activities (0) | Reminders (0) | Smartinbox (18) | Completed (0)

Display activities for: Today

No Activities to display.

Key

- Organisation
- Enquiry
- Contact
- Calendar
- Event
- Distribution List
- SmartMailer
- Land Parcel
- Building

Organisations: 20

Contacts: 64

Enquiries: 21

Activities: 219

No Data Qualified
(no data has been returned given the fields and filters on the report)

Show Users

Help

Accessing the Support Hub

When using the **Support Hub** link for the first time, you will be asked to verify your email address.

You only have to verify your Email Address once!

Once this is complete, you will have full access to the Support Hub, each time you log into Tractivity.

By clicking the **Validate Email** button an email will be sent to your email address.

Please Note – should your **Main Email Address** be displayed incorrectly via the pop-up message, please update via the My Settings link, found in the top right-hand corner.

Account Email Validation



Before you can visit our Support Hub you must first confirm that you have access to your main email address (vicky.adamson@tractivity.co.uk).

To do this, please click the "Validate Email" button below, which will send you an email containing further instructions.

VALIDATE EMAIL

1

Accessing the Support Hub

1. An email will appear in your inbox within a few minutes, providing you with a link to **Log In**.
2. Please log back into Tractivity, where the **support hub** will now become available for you to use.

Tractivity®

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Please log in to validate your Account email address.

Please note - If you are currently logged in to Tractivity, you will be logged out.

Username:

vadamson

Password:

••••••••

[Forgot your password?](#)

LOG-IN

Log-in failed. Please try again.



Mon 05/08/2019 13:27

mailings@tracmail.co.uk

Original Recipient: vicky.adamson@tractivity.co.uk - Validate your Email for Tractivity

To: Adam Eansworth

If there are problems with how this message is displayed, click here to view it in a web browser.

Tractivity

Dear Vicky Adamson,

A request to validate your email address has been sent from Tractivity.

To confirm that vicky.adamson@tractivity.co.uk is your main email address, please use the link below to log into Tractivity.

1

[Log In](#)

Many thanks,
The Tractivity Team



01629 813961

www.tractivity.co.uk

Global Search

1. A **Global Search** icon is available throughout Tractivity, allowing you to search your whole Tractivity system using keywords.

This includes searching for Contacts, Organisations, Enquiries, Activities, Events, Surveys and Buildings..

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System Admin | Archive | My Settings | Log-out
Logged-in as: Tom Keep | Last log-in: 13:50 on 16/12/2019
You are currently viewing: Example Project

HOMECALENDARBUILDINGSORGANISATIONS & CONTACTSENQUIRIESISSUESSURVEYSLAND PARCELSLIBRARYDISTRIBUTION LISTS

EVENTSEMAILMAILSHOTREPORTSWORKFLOW

Organisations & Contacts: Search

Add New:

- Add Contact
- Add Organisation

Search:

- Organisations & Contacts

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

SUBMIT

SETTINGS

CLEAR

ContactsOrganisationsBuildingsSaved Searches (0)

No Contacts to display

Global Search

Select what modules of Tractivity you wish to search using the drop-down list.

Results are populated based on the keyword appearing within the following areas;

1. **Contacts**, Contact FirstName or Contact Last Name.
2. **Organisations**, Any matching Activity Title, Activity Notes, or Activity Agreement Notes
3. **Enquiries**, Enquiry Title, Enquiry Purpose of Engagement, Enquiry Notes or Enquiry Agreement Notes.
4. **Activity**, Activity Title, Activity Notes or Activity Agreement Notes.
5. **Event**, Event Title, Event Purpose of Event Engagement, Event Notes or Event Agreement Notes.
6. **Building**, Building Name, Building Town, Building Postcode.
7. **Survey**, Survey Title, Survey Notes.

HOMECALENDARBUILDINGSORGANISATIONS & CONTACTSENQUIRYFEEDBACKISSUESURVEYSLAND PARCELSLIBRARYDISTRIBUTION LISTSEVENTS

EMAILMAILSHOTSREPORTSWORKFLOW

Search for: vicky

in Everything

SEARCH

Everything

Contacts

Organisations

Enquiries

Events

Buildings

Surveys

Contacts

Contact	Organisation	Email	Edit
Adams, Vicky	Trac Systems Trac Tek Systems Vicky's Cake Shop LTD	vicky.adams@tractivity.co.uk	Edit
Adamson, Vicky	Tractivity Limited	vicky.adamson@tractivity.co.uk	Edit
Wood, Vicky	Trac Systems	vicky.adams@tractivity.co.uk	Edit
Wood, Vicky	Cake Shop	vicky.wood@cakeshopstoke.co.uk	Edit

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

Organisations

Organisation Name	Account Han..	Organisatio..	Edit
Vicky's Cake Shop LTD	Adamson, Vicky		Edit

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

Enquiries

Ref No	Title	Contact	Enquiry Sta..	Created Dat..	Edit
50	Consultation Edge Road	Adams, Vicky	Closed	11/04/2019	Edit

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

Activities

Date	Activity/Action	Title	Creator	Status
11/04/2019	Phone Call	Phone Call Edge Road, response to email	Adamson, Vicky	✓
07/02/2019	Phone Call	Phone Call with Stakeholder	Keep, Tom	✓
28/03/2018	Email Sent	Reminder Email sent	Adamson, Vicky	✓
28/03/2018	Email Sent	Reminder Email sent	Adamson, Vicky	✓
28/03/2018	Email Invitation Sent	Invitation Email sent	Adamson, Vicky	✓

1 2

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

Events

No Events to display

Buildings

No Buildings to display

Surveys

No Surveys to display

Selecting a Project

Tractivity can allow you to view data within multiple projects.

1. Should you have access to multiple projects you will see a projects drop-down menu in the top right hand corner.

Switch between projects at anytime to view data only belonging to this project.

Please note - You can also set your **default project** by accessing your **My Settings**.

The screenshot displays the Tractivity web application interface. At the top, the Tractivity logo is on the left, and on the right, there are links for System Admin, Support Hub, Archive, My Settings, and Log-out. Below these links, it shows the user is logged in as Vicky Adamson, with a last log-in time of 13:39 on 01/08/2019. A red circle with the number '1' highlights a dropdown menu labeled 'You are currently viewing: Infrastructure Project'.

Below the header is a navigation bar with tabs for HOME, CALENDAR, BUILDINGS, ORGANISATIONS & CONTACTS, ENQUIRY/FEEDBACK, ISSUES, SURVEYS, LAID PARCELS, LIBRARY, and DISTRIBUTION LISTS. A secondary row of tabs includes EVENTS, EMAIL, MAILSHOTS, REPORTS, and WORKFLOW.

The main content area starts with a welcome message: 'Welcome to Tractivity: 01 August 2019'. Below this is a search icon. A row of four buttons shows 'Today's Activities (0)', 'Reminders (0)', 'Smartinbox (0)', and 'Completed (0)'. A dropdown menu for 'Display activities for:' is set to 'Today'. Below this, it states 'No Activities to display.'.

A 'Key' section lists various activity types with corresponding color-coded squares: Organisation (yellow), SmartMailer (green), Enquiry (blue), Land Parcel (pink), Contact (red), Building (orange), Calendar (light green), Event (teal), and Distribution List (grey).

The dashboard is divided into several sections:

- Organisations:** A box showing a count of 0.
- Contacts:** A box showing a count of 20.
- Enquiries:** A box showing a count of 0.
- Activities:** A box showing a count of 53.
- Upcoming Events:** A table showing events with columns for date, event name, and status. One event is listed: 25/09/2018, Focus Group Session, with a status of 0 / 0.
- Top 5 Issues Raised:** A table showing the total number of issues for various categories, all currently at 0.
- Activities Created:** A line graph showing the number of activities created over the last 10 weeks, with a y-axis ranging from 0 to 0.15.
- Responses By Survey:** A horizontal bar chart showing the number of responses for six different surveys.

Issue Category	Total
Partner Dispute / Operational	0
Partner Dispute / Engagement	0
Polution / bikes	0
Partner Dispute / Strategic	0
Partner Dispute / Communications	0

Survey	Responses
Pet Survey	4
Product Survey	1
Healthcare Survey	2
Country Park Feedback	4
Car Survey	4
Client Feedback Survey	4

Changing your Personal Settings

From changing your password to adding an email signature, **My Settings** is a useful area to make note of.

1. **Main Email** and **Project Email** can be amended via the left-hand menu, select **Edit Details**.
2. **Receive Daily Email Alerts**, is great way for keeping you up to date with your planned activities. The emails include contact name, contact details and notes.
3. Select your **default project**, by ticking your preferred default project if more than one project has been assigned to you.

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System Admin | Support Hub | Archive | My Settings | Log-out
Logged-in as: Mark Rutter | Last log-in: 12:00 on 14/08/2019

HOME

CALENDAR

BUILDINGS

ORGANISATIONS & CONTACTS

ENQUIRY/FEEDBACK

ISSUES

SURVEYS

LAND PARCELS

LIBRARY

DISTRIBUTION LISTS

EVENTS

EMAIL

MAILSHOTS

REPORTS


My Settings: View Details

Details:

- View Details

- Edit Details

1

Organisation	Example Project
First Name	Mark
Last Name	Rutter
Main Email	 mark.rutter@tractivity.co.uk
Project Email	mark.rutter@tractivity.co.uk
Email Signature	
Telephone	
Username	mrutter
Access Profile	Administrator Team
Receive Daily Email	No
Account Status	Active
Teams	Engagement Team

Project Name

Example Project

Default Project

☒

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

3



Vicky Adamson
Client Relationship Manager



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