Tractivity[®] Getting started with Tractivity

Adding Stakeholders, Enquiries and Issues to Your System

Add Stakeholder
Create Enquiry
Add Activities
Add Issues



Access Your Account

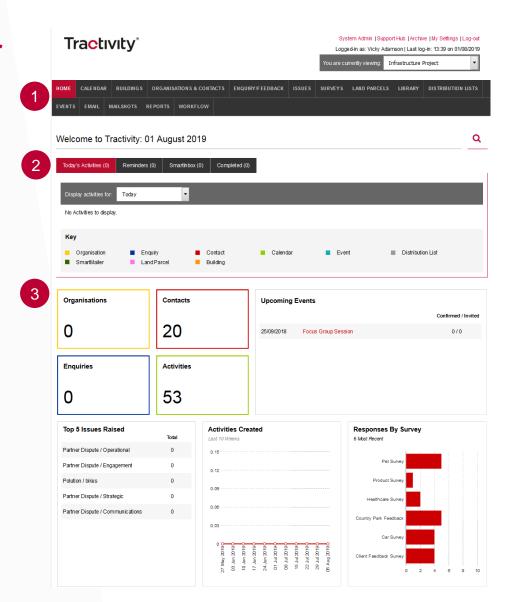
Open your web browser and enter the URL provided by your system administrator and enter your unique username and password. The first time you login to the system, you'll be asked to create a new password.

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.

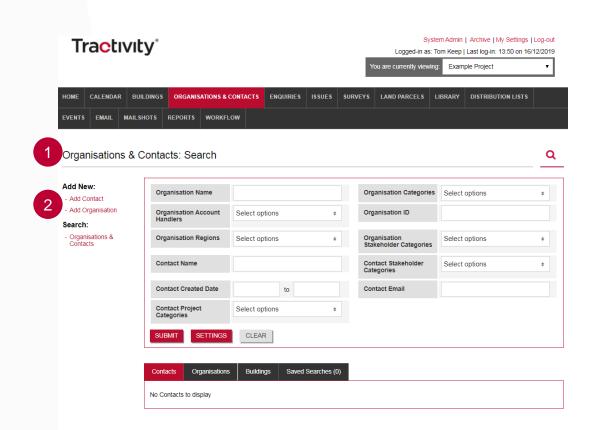
- A black navigation bar runs across the top of your screen, displaying all the different modules available inside Tractivity.
- View today, overdue, upcoming and completed activities for your attention.
- An Interactive dashboard, providing an overview of your system in a combination of charts, graphs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



The Left-Hand-Menu & Page Title

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

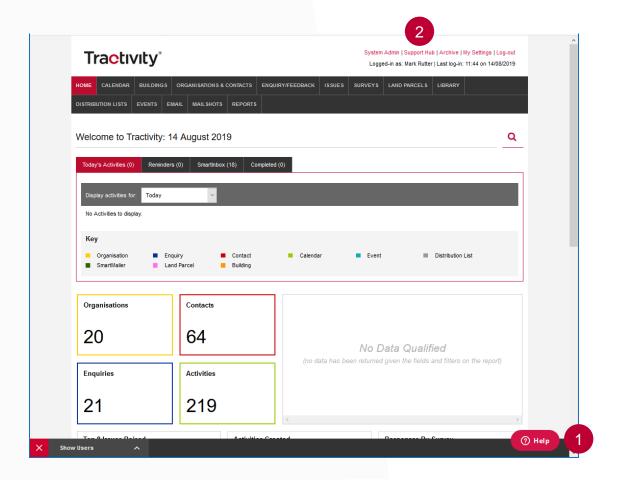




Getting Help

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

- 1. Click **Help** on any Tractivty 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.



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



Accessing the Support Hub

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



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

o Adam Eansworth

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



Dear Vicky Adamson,

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

To confirm that wicky.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





in

01629 813961

www.tractivitv.co.u







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:

Password:

Forgot your password?

vadamson

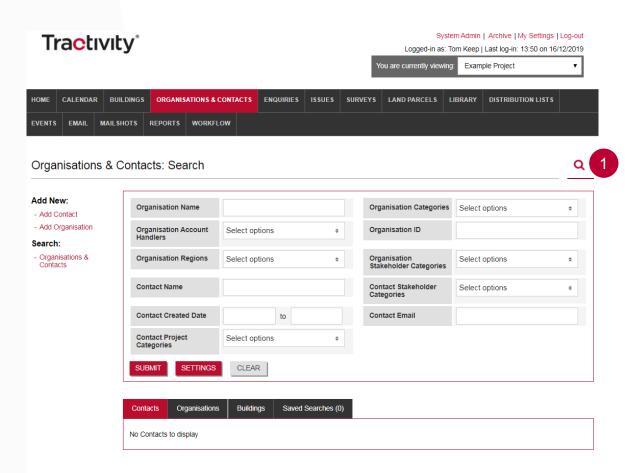
LOG-IN

Log-in failed. Please try again.

Global Search

 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..

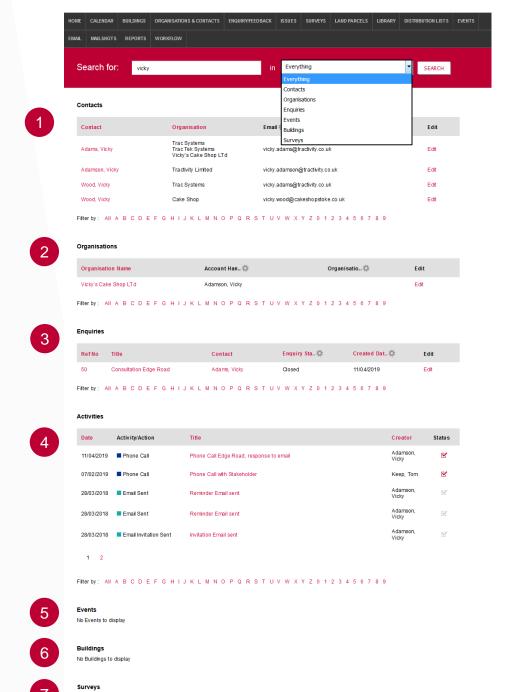


Global Search

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;

- 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.



No Surveys to display

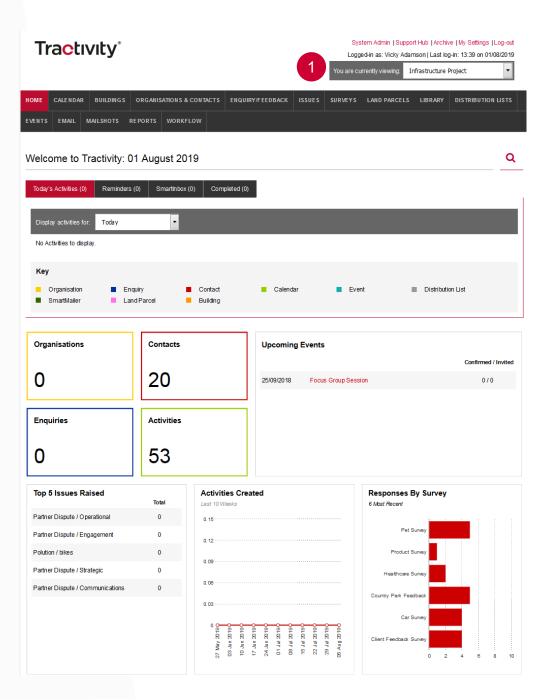
Selecting a Project

Tractivity can allow you to view data within multiple projects.

 Should you have access to multiple projects you will see a projects dropdown menu in the top right hand corner.

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

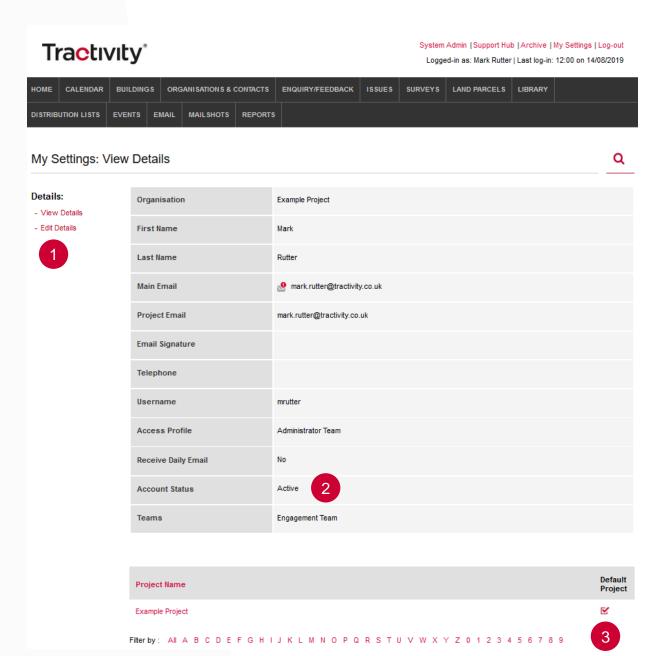
Please note - You can also set your default project by accessing your My Settings.



Changing your Personal Settings

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

- Main Email and Project Email can be amended via the left-hand menu, select Edit Details.
- 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.
- Select your default project, by ticking your preferred default project if more than one project has been assigned to you.





Client Relationship Manager



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