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.

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 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

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   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.

Mon 05/08/2019 13:27

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

To   Adam Eansworth

(i) 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

✉ 🐦 in   01629 813961   www.tractivity.co.uk

2 ⚠️ **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

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..

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.

HOME | CALENDAR | BUILDINGS | ORGANISATIONS & CONTACTS | ENQUIRY/FEEDBACK | ISSUES | SURVEYS | LAND PARCELS | LIBRARY | DISTRIBUTION LISTS | EVENTS
EMAIL | MAILSHOTS | REPORTS | WORKFLOW

Search for: vicky in Everything ▼ SEARCH

Everything
Contacts
Organisations
Enquiries
Events
Buildings
Surveys

① 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

② 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

③ 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

④ 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

⑤ Events
No Events to display

⑥ Buildings
No Buildings to display

⑦ 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.**

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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| DISTRIBUTION LISTS | EVENTS | EMAIL | MAILSHOTS | REPORTS |

My Settings: View Details

Details:
- View Details
- Edit Details

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	Default Project
Example 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

Vicky Adamson

Client Relationship Manager

Tractivity®

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