



Tag Issues & Extra Enquiry Functions

Adding Stakeholders, Enquiries and Issues to Your System

Add Contact ➡ Add Enquiry ➡ Add Activities ➡ Tag Issues

Create an Enquiry for multiple contacts

Create an enquiry against multiple contacts.

Create the enquiry against one contact, this contact will be the main contact. **Please note all activities will be associated to the main contact.**

1. Once you have created your enquiry against the main contact, click **Attach Associated Contacts**.

Enquiries: View Enquiry

Add New:

- Add Enquiry Activity

Enquiry:

- View Enquiry
- Edit Enquiry
- Clone Enquiry
- Attach Associated Contacts
- Refer Enquiry
- Reassign Enquiry
- Link Associated Event
- Archive Enquiry

Communicate:


- Email Contact
- Email Enquiry Details
- Text Contact





Print:

- Printable Version

Search:

- Enquiries
- Organisations & Contacts

Enquiry Title	Garden Gate Damaged - Hall Street Roadworks	 Drag an email here or click to select
Contact Name	Adamson, Victoria T:01629 815907 M:447718 864476	
Associated Organisation	No Organisation	
Buildings	Endcliffe Court Ashford Road, Bakewell, Derbyshire, DE45 1GT	
Sub Projects	Consultation A	
Stakeholder Category	2. Statutory Stakeholder	
Consultation Phase	Consultation Phase	
Enquiry Status	Live - 17/04/2020	
Enquiry Received	02/04/2020	
Account Handler	vadamson, Vicky	

Full Details	Activities (4)	Activity Attachments (2)	Issues (0)	Associated Contacts (0)	Mapping
Enquiry ID	99			Created	Adamson, Vicky - 08/04/2020
Enquiry Made Via	1. Telephone			Last Edited	vadamson, Vicky - 17/04/2020
Enquiry Reason	Compliant			Owner Teams (Teams who may edit)	Example Project: Engagement Team (Default Team) Example Project: vadamson, Vicky
Enquiry Feedback Type	Formal				
Enquiry Categories					
Associated Event	No Event				
Notes (Summary of Key Points)	Garden gate was damaged - will speak with internal team to access damage Team went out and created report & Photos Stakeholder offered X Accepted - Happy				
Agreement Notes	offered X amount for damage				

Add associated contacts to your enquiry

You can add 1 additional contact, several or your whole stakeholder database.

1. Using the search boxes, find your stakeholders. Remember clicking submit will return everyone inside your system.
2. Use the tick boxes to highlight which contact's you wish to add.
3. Once you have selected all the contacts, click **Add to Enquiry**

Enquiries: Add Associated Contacts

Enquiry:

[- View Enquiry](#)

Search:

[- Enquiries](#)

[- Organisations & Contacts](#)

Organisation Name	<input type="text"/>	Organisation ID	<input type="text"/>
Organisation Created Date	<input type="text"/> to <input type="text"/>	Organisation Sectors	Select options *
Organisation Stakeholder Categories	Select options *	Contact Position Held	<input type="text"/>
Contact Name	<input type="text"/>	Contact Email	tractivity.co.uk
Contact Distribution List	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 ⚙	Telephone ⚙	Attach
<input type="checkbox"/>	Adamson, Victoria	Exeter Council Tractivity Ltd	victoria.adamson@tractivity.co.uk	01629 815907	Attach
<input type="checkbox"/>	Banks, Steve		steve.banks@tractivity.co.uk		Attach
<input type="checkbox"/>	Casewell, Steven		steven.casewell@tractivity.co.uk		Attach
<input type="checkbox"/>	Dillion, steve		steve.jesop@tractivity.co.uk		Attach
<input type="checkbox"/>	Falkland, Sarah	Falkland Ltd	sarah.jones2@tractivity.co.uk	01628 716625	Attach
<input type="checkbox"/>	Glover, Wayne		wayne.glover@tractivity.co.uk	01629 815901	Attach
<input type="checkbox"/>	James, Mark		mark.james@tractivity.co.uk		Attach
<input type="checkbox"/>	Keep, Tom	HMS Falkland	tom.keep@tractivity.co.uk		Attach
<input type="checkbox"/>	Kelson, James		jame@tractivity.co.uk		Attach
<input type="checkbox"/>	Potter, Lee		lee.potter@tractivity.co.uk		Attach
<input type="checkbox"/>	Rivers, Paul		paul.rivers@tractivity.co.uk	01629 815916	Attach
<input type="checkbox"/>	Rutter, Emma		emma.rutter@tractivity.co.uk	01629 815916	Attach
<input type="checkbox"/>	Sims, Pete		Pete.sims@tractivity.co.uk		Attach
<input type="checkbox"/>	Trainee, Happy		happytrainee@tractivity.co.uk		Attach
<input type="checkbox"/>	Weinbren, Jamie		jamie.weinbren@tractivity.co.uk		Attach

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

Add associated contacts to your enquiry

1. All Associated contacts are displayed on the halfway navigation bar inside the tab titled **Associated Contacts**.
2. If you add a contact in error, click **Detach**

Enquiries: View Enquiry



Add New:

- Add Enquiry Activity

Enquiry:

- View Enquiry

- Edit Enquiry

- Clone Enquiry

- Attach Associated
Contacts

- Refer Enquiry

- Reassign Enquiry

- Link Associated Event

- Archive Enquiry

Communicate:

- Email Contact

- Email Enquiry Details

- Text Contact

Print:

- Printable Version

Search:

- Enquiries

- Organisations &
Contacts

Enquiry Title	Garden Gate Damaged - Hall Street Roadworks	Add Email
Contact Name	Adamson, Victoria T:01629 815907 M:447718 864476	 Drag an email here or click to select
Associated Organisation	No Organisation	
Buildings	Endcliffe Court Ashford Road, Bakewell, Derbyshire, DE45 1GT	
Sub Projects	Consultation A	
Stakeholder Category	2. Statutory Stakeholder	
Consultation Phase	Consultation Phase	
Enquiry Status	Live - 17/04/2020	
Enquiry Received	02/04/2020	
Account Handler	vadamson, Vicky	

1

Full Details	Activities (4)	Activity Attachments (2)	Issues (0)	Associated Contacts (2)	Mapping
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Contact	Organisation(s)	Telephone	Mobile	Edited By	Detach
Casewell, Steven				Keep, Tom	Detach
Keep, Tom	HMS Falkland			Keep, Tom	Detach
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

Add associated contacts to your enquiry

1. Click, **Add Enquiry Activity**
2. On the Add Activity screen a new option is shown titled, **Related Contacts**. Select which contacts your activity is associated to.

Remember; The Enquiries main contact will always have every activity shown.

1

Add New:
- Add Enquiry Activity
Enquiry:
- View Enquiry
- Edit Enquiry
- Clone Enquiry

Enquiry Title

Garden Gate Damaged - Hall Street Roadworks

Add Email

Contact Name

Adamson, Victoria
T:01629 815907
M:447718 864476

Associated Organisation

No Organisation

Title *

Activity Type *

--select--

Status *

--select--

Sub Project

--select--

Stakeholder Category

2. Statutory Stakeholder

Notes

Related Contacts

Select options

2

Allocated To Teams *
(Teams who may view the activity on their Home screen)

Owner Teams *
(Team who may edit)

Make Notes Confidential?
Only owners will be able to see Notes, Agreement Notes, Email Notes and download Attachments

Confidential Activities cannot be cloned.

Start Date *
(dd/mm/yyyy)

End Date *
(dd/mm/yyyy)

Add reminder?

Filter: Enter keywords

☒ Check all
☒ Uncheck all

☐ Adamson, Victoria
☐ Casewell, Steven
☐ Keep, Tom

☐ All day event

27/04/2020

Not Set

Not Set

27/04/2020

Not Set

Not Set

☐

SAVE

CANCEL

(2)

Mapping

Edited By

Detach

Keep, Tom

Detach

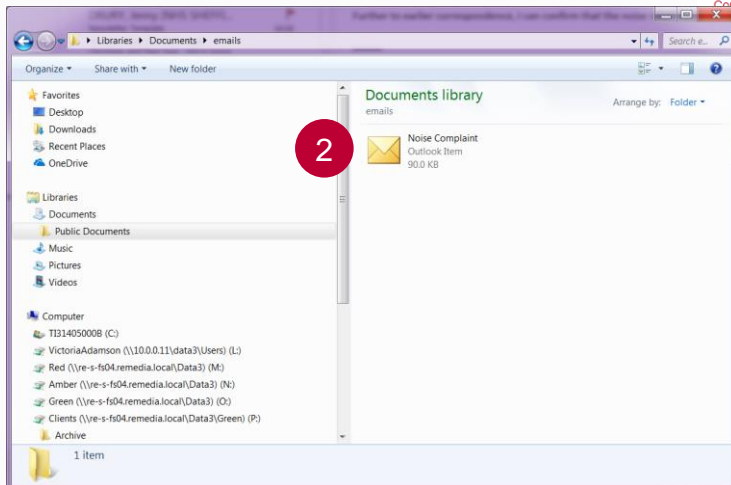
Keep, Tom

Detach

Z 0 1 2 3 4 5 6 7 8 9

Adding Emails to an Enquiry

1. From **View Enquiry** screen, you can drag and drop emails straight into Tractivity. Click, **Add Email**.
2. First, save the email(s) on your desktop. Save the email as document file.
3. Drag and drop the emails from your desktop folder into your Tractivity system.
4. An activity will automatically be generated and saved within the half-way navigation bar.



Tractivity®

System Admin | Archive | My Settings | Log-out

Logged-in as: Tom Keep | Last log-in: 13:07 on 20/12/2019

You are currently viewing: Example Project

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

Enquiries: View Enquiry

Add New:

- Add Enquiry Activity

Enquiry:

- View Enquiry
- Edit Enquiry
- Clone Enquiry
- Attach Associated Contacts
- Refer Enquiry
- Reassign Enquiry
- Link Associated Event
- Archive Enquiry

Communicate:

- Email Contact
- Email Enquiry Details
- Text Contact

Print:

- Printable Version

Search:

- Enquiries
- Organisations & Contacts

Enquiry Title	Compliant	<div>1</div> <div>Add Email</div> <div> <p>Drag an email here or click to select</p> <div>3</div> </div>
Contact Name	Adams, Sarah T:01782 716652 M:447776 295591	
Associated Organisation	Pub Meeting Group	
Buildings	26b Clifton Hill, Exeter, Devon, EX1 2DJ	
Stakeholder Category	1. Non Statutory Stakeholder	
Enquiry Status	Live	
Enquiry Received	12/12/2019	
Account Handler	Keep, Tom	

Full DetailsActivities (5)Activity Attachments (0)Issues (0)Associated Contacts (0)Mapping

PREVIEW ACTIVITIES

Date	Activity/Action	Title	Status	Issues	Edit	Archive
26/12/2019	Meeting	Arrange meeting with Stakeholder	<input type="checkbox"/>	0	Edit	Archive
23/12/2019	Email Received	Using Office 365 on Windows 7	<input checked="" type="checkbox"/>	0	Edit	Archive
19/12/2019	Refer Enquiry	Refer enquiry feedback to relevant personal	<input type="checkbox"/>	0	Edit	Archive
13/12/2019	Feedback Received	Send post event survey	<input type="checkbox"/>	0	Edit	Archive
12/12/2019	Phone Call	Call Stakeholder providing feedback	<input type="checkbox"/>	0	Edit	Archive

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

Email from a Enquiry

1. From View Enquiry screen, email any contact linked to your Enquiry, by using the left-hand option **Email Contact**
2. Alternatively if you wish to reply to an email received, click on the Email Title. Click **Reply to Contact** from the left hand menu and the email trail will be included with your reply.

Tractivity®

System Admin | Archive | My Settings | Log-out

Logged-in as: Tom Keep | Last log-in: 13:07 on 20/12/2019

You are currently viewing: Example Project

HOME

CALENDAR

BUILDINGS

ORGANISATIONS & CONTACTS

ENQUIRIES

ISSUES

SURVEYS

LAND PARCELS

LIBRARY

DISTRIBUTION LISTS

EVENTS

EMAIL

MAILSHOTS

REPORTS

WORKFLOW

Enquiries: View Enquiry

Add New:

- Add Enquiry Activity

Enquiry:

- View Enquiry

- Edit Enquiry

- Clone Enquiry

- Attach Associated Contacts

- Refer Enquiry

- Reassign Enquiry

- Link Associated Event

- Archive Enquiry

Communicate:

- Email Contact

- Email Enquiry Details

- Text Contact

Print:

- Printable Version

Search:

- Enquiries

- Organisations & Contacts

Enquiry Title

Compliant

Contact Name

Adams, Sarah
T:01782 716652
M:447776 295591

Associated Organisation

Pub Meeting Group

Buildings

26b Clifton Hill, Exeter, Devon, EX1 2DJ

Stakeholder Category

1. Non Statutory Stakeholder

Enquiry Status

Live

Enquiry Received

12/12/2019

Account Handler

Keep, Tom

Add Email

Drag an email here
or click to select

Full Details

Activities (5)

Activity Attachments (0)

Issues (0)

Associated Contacts (0)

Mapping

PREVIEW ACTIVITIES

Date	Activity/Action	Title	Status	Issues	Edit	Archive
26/12/2019	Meeting	Arrange meeting with Stakeholder	<input type="checkbox"/>	0	Edit	Archive
23/12/2019	Email Received	Using Office 365 on Windows 7	<input checked="" type="checkbox"/>	0	Edit	Archive
19/12/2019	Refer Enquiry	Refer enquiry feedback to relevant personal	<input type="checkbox"/>	0	Edit	Archive
13/12/2019	Feedback Received	Send post event survey	<input type="checkbox"/>	0	Edit	Archive
12/12/2019	Phone Call	Call Stakeholder providing feedback	<input type="checkbox"/>	0	Edit	Archive

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

Tag Issues

Each activity or file that you attach to Tractivity can be tagged against an issue(s).

1. **Tag Issues**, by selecting the tag icon or use the left-hand menu **Tag Issues** option.

Tractivity®

System Admin | Archive | My Settings | Log-out
Logged-in as: Tom Keep | Last log-in: 13:07 on 20/12/2019
You are currently viewing: Example Project

HOMECALENDARBUILDINGSORGANISATIONS & CONTACTSENQUIRIESISSUESSURVEYSLAND PARCELSLIBRARYDISTRIBUTION LISTSEVENTSEMAILMAILSHOTREPORTSWORKFLOW

Enquiries: View Activity

1

Add New:

- Add Enquiry Activity


Activity:

- View Activity
- Edit Activity
- Clone Activity
- Reassign Activity
- Attach Library File
- Tag Issues
- Delete Enquiry Activity

Search:

- Enquiries
- Organisations & Contacts

GO BACK

Title *	Arrange meeting with Stakeholder	<div>Add Attachment</div> <div><div>Done! Add Another?</div></div>
Parent Enquiry	Compliant	
Parent Contact Name	Adams, Sarah T:01782 716652 M:447776 295591	
Activity Type	Meeting	
Start Date/Time	26/12/2019 14:11	
End Date/Time	26/12/2019 14:11	
Status	Pending	
Notes	Arrange meeting with the stakeholder after 14 days	<div>1</div>

ADD ACTIVITY TO OUTLOOK

DetailsIssues (0)Attachments (1)

File Name	Date	Type	Issues	Delete	View
3. Adding Enquiries -new ifm	23/12/2019	PowerPoint		Delete	View

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

Tag Issues

1. **Select Source**, select *either* your activity notes or any attachment. Make sure you press **UPDATE** if you switch between the two sources.
2. **Issue**, select the associated issue.
3. **Transcript**, Highlight your text and then simply press COPY + PASTE.
4. **Sentiment**, log the sentiment, Negative, Neutral or Positive

SAVE & TAG NEW should you wish to add more issues

Or

Select **SAVE** once all issues are tagged.

The screenshot shows the 'Tag Issue' interface. At the top, there's a red header with the title 'Tag Issue' and a close button. Below the header, there's a 'Select Source *' dropdown and a 'Document Title - DD/MM/YYYY' field. A red circle with the number '1' is next to the 'UPDATE' button. The main content area shows a document preview with a red overlay that says '10 Positive Steps to Stakeholder Engagement' and 'Traotvity'. Below the preview, the title '10 Positive Steps to Stakeholder Engagement' and the date '29th June 2017' are displayed. A red circle with the number '3' is next to the text 'Here are 10 quick steps which should help improve your stakeholder engagement;'. On the right side, there's a sidebar with an 'Issue *' dropdown (labeled with a red circle '2'), a 'Transcript *' section with a 'COPY + PASTE' button (labeled with a red circle '3'), and a 'Sentiment *' dropdown (labeled with a red circle '4'). At the bottom, there are three buttons: 'SAVE', 'SAVE & TAG NEW', and 'CANCEL'.

Add Future Activities & Creating Reminder's

For a future **Activities** you can set a reminder.

Reminders will appear on your Homescreen and inside Daily Email Alerts, and can be set to a frequency that suits you.

1. Set the Activity to a status of **Pending**.
2. Click, **Add Reminder**.
3. **Reminder Pattern**, set a start & end date, and how frequent you wish to see the reminder.

Tractivity®

System Admin | Archive | My Settings | Log-out
Logged-in as: Tom Keep | Last log-in: 13:07 on 20/12/2019
You are currently viewing: Share Info

HOMECALENDARBUILDINGSORGANISATIONS & CONTACTSENQUIRIESISSUESSURVEYSLAND PARCELSLIBRARYDISTRIBUTION LISTSEVENTSEMAILMAILSHOTREPORTSWORKFLOW

Enquiries: Add Enquiry Activity

Enquiry:
- View Enquiry

Search:
- Enquiries
- Organisations & Contacts

1

Title *

Chase Outcome

Activity Type *

Courtesy Call

Status *

Pending

Sub Project *

Consultation A

Stakeholder Category

1. Non Statutory Stakeholder

Notes

Please chase outcome for stakeholder and provide an update

Agreement Notes

Related Contacts

Select options

Allocated To Teams *

1 selected

Owner Teams *

2 selected

Start Date *

30/12/2019

Not Set

Not Set

☐ All day event

End Date *

30/12/2019

Not Set

Not Set

2

Add reminder?

☒

3

Reminder pattern

☒ Daily

☐ Weekly

☐ Monthly

☐ Yearly

☐ Every

1

day(s)

☒ Every weekday

Range of reminder

Start Date:

23/12/2019

Start time:

Not Set

Not Set

☒ End after

7

occurrences

☐ End by

30/12/2020

SAVE

CANCEL

Homescreen managing your activities

View all Activities on the Homescreen, from overdue, reminders and completed.

1. **Todays Activities Tab**, displays the number of activities. The 1 Activity automatically appears in the grid below.
2. Use the drop-down menu view all your planned activities for; **Next 3 Days**, **Next 5 days**, **Next 7 days**.
3. **Activity Reminders** displays the number of reminders for today. Click on the tab to see details of the activity.
4. **Completed Activities** displays the number of reminders for today. Click on the tab to see details of the activity.
5. Overdue Activities are highlighted in a red banner. Click on the **+ symbol** to view all **Overdue Activities**.

The screenshot shows the Tractivity Homescreen interface. At the top, the Tractivity logo is on the left, and navigation links (System Admin, Archive, My Settings, Log-out) and login information (Logged-in as: Tom Keep | Last log-in: 13:07 on 20/12/2019) are on the right. A dropdown menu shows 'You are currently viewing: Example Project'. Below this is a horizontal menu with tabs: HOME, CALENDAR, BUILDINGS, ORGANISATIONS & CONTACTS, ENQUIRIES, ISSUES, SURVEYS, LAND PARCELS, LIBRARY, DISTRIBUTION LISTS, EVENTS, EMAIL, MAIL SHOTS, REPORTS, and WORKFLOW. The main content area starts with a welcome message 'Welcome to Tractivity 23 December 2019' and a search icon. Below this is a row of tabs: Today's Activities (1), Reminders (1), Smartinbox (46), and Completed (0). A red banner at the top of the activity list states 'You have 15 Overdue Activities.' with a '+' icon. Below the banner is a dropdown menu for 'Display activities for:' set to 'Today'. The activity list table has columns: Date, Activity/Action, Title, Associated To, and Status. A single activity is listed for 23/12/2019: 'Email Sent' (blue square icon), 'Email - Planning' (red text), 'FOI Request' (Associated To), and an empty status box. At the bottom is a 'Key' section with color-coded icons for various entity types: Organisation (yellow), User (purple), Enquiry (blue), SmartMailer (green), Contact (red), Land Parcel (pink), Calendar (light green), Building (orange), Event (teal), and Distribution List (grey).

Tractivity®

System Admin | Archive | My Settings | Log-out
Logged-in as: Tom Keep | Last log-in: 13:07 on 20/12/2019
You are currently viewing: Example Project

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

Welcome to Tractivity 23 December 2019

Today's Activities (1) Reminders (1) Smartinbox (46) Completed (0)

You have 15 Overdue Activities.

Display activities for: Today

Date	Activity/Action	Title	Associated To	Status
23/12/2019	Email Sent	Email - Planning	FOI Request	

Key

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



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