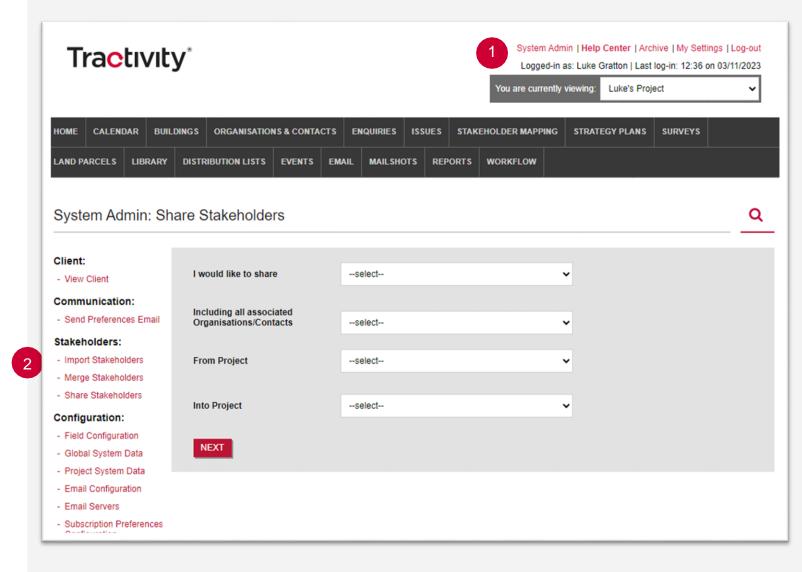


### **Share Stakeholders**

Tractivity's Share Tool allows you to share stakeholders across your projects. We appreciate some stakeholders have interests in more than one project.

- 1. Go to System Admin
- 2. On the left-hand menu under **Stakeholders** click **Share Stakeholders**



#### **Definitions**

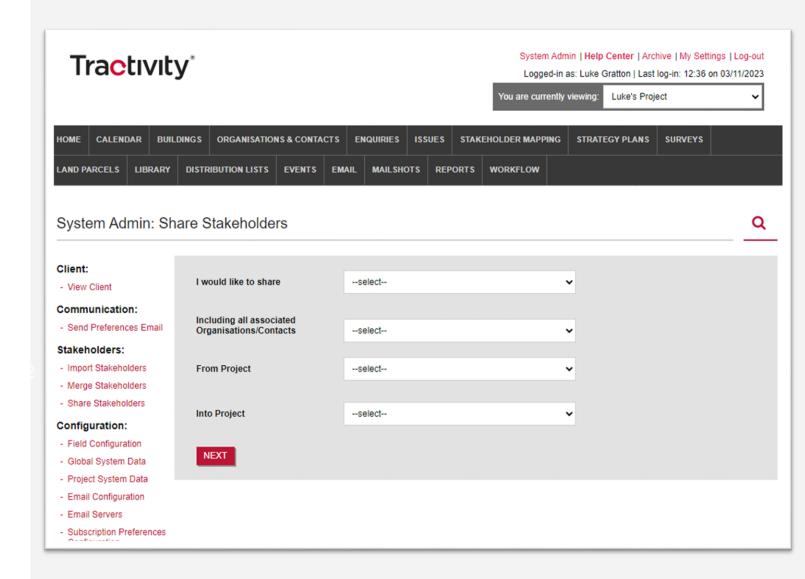
To use the Share Tool you will need to have more than one project in your system.

I would like to share – you can select either 'Organisation' or 'Contacts'. If you have both types to share, you will need to do this separately.

Including all associated Organisations/Contacts – you can have associations within Tractivity. For example, as a Customer Success Manager, I am associated to Tractivity. If you select 'Yes', this information will be shared, too.

**From Project –** you'll be sharing data from the project you chose here

**Into Project –** this is where the data will be shared to.

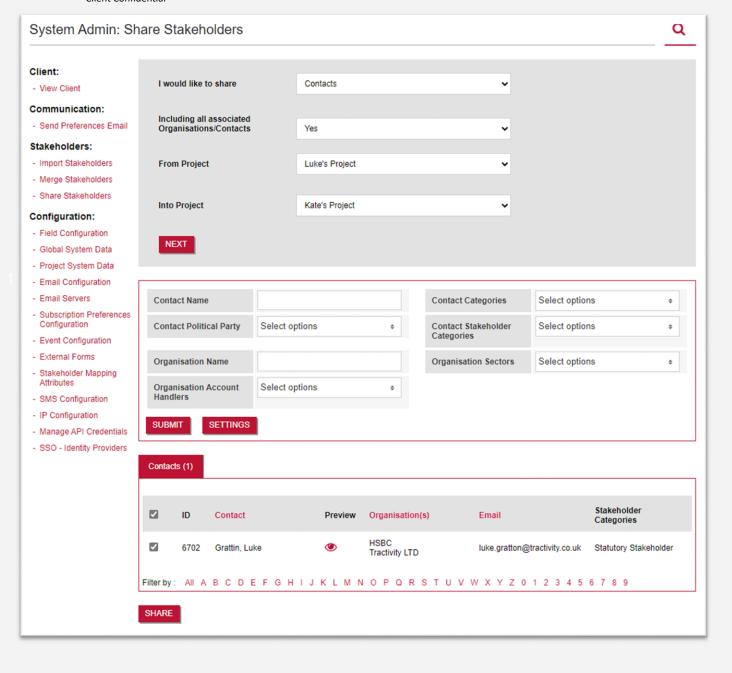


## Selecting Stakeholders

Once you have provided information against all 4 dropdowns (see slide 3), click **Next** 

You can then use Tractivity's Search functionality to find your specific organisations/contacts to share into a project.

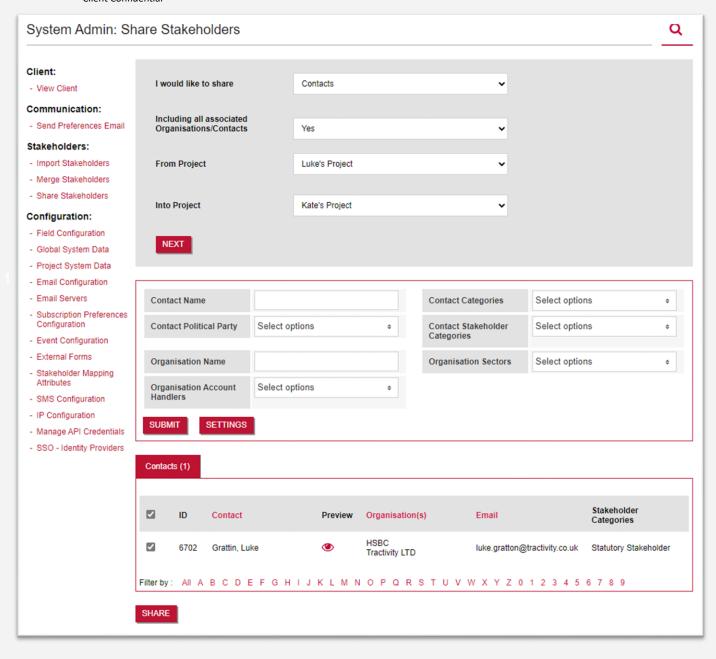
**Top tip:** if you wish to share **all organisations/contacts** from one project to another, simply leaving all search options blank and click **Submit** 



# Sharing Stakeholders

When you've loaded your chosen data, click the tick option under Contacts (this will say Organisations if you choose Organisations under 'I would like to share')

Review your choices and click **Share** when you're ready.



## **Share Success**

#### Congratulations!

You've successfully shared a contact from one project to another.

Click **Share More** to share more data, repeating the steps provided.

Client Confidential



From Project Luke's Project

Into Project Luke's Project - Child Demo

Number of Organisations Shared 2
Number of Contacts Shared 1

SHARE MORE

