


System Admin: Share Stakeholders

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**

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 Logged-in as: Luke Gratton | Last log-in: 12:36 on 03/11/2023
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I would like to share
 --select--

Including all associated Organisations/Contacts
 --select--

From Project
 --select--

Into Project
 --select--

NEXT

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.

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--select--

Including all associated Organisations/Contacts

--select--

From Project

--select--

Into Project

--select--

NEXT

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**

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- SMS Configuration

- IP Configuration

- Manage API Credentials

- SSO - Identity Providers

I would like to share

Contacts

Including all associated Organisations/Contacts

Yes

From Project

Luke's Project

Into Project

Kate's Project

NEXT

Contact Name

Contact Categories

Select options

Contact Political Party

Select options

Contact Stakeholder Categories

Select options

Organisation Name

Organisation Sectors

Select options

Organisation Account Handlers

Select options

SUBMIT

SETTINGS

Contacts (1)

✓	ID	Contact	Preview	Organisation(s)	Email	Stakeholder Categories
✓	6702	Grattin, Luke		HSBC Tractivity LTD	luke.grattin@tractivity.co.uk	Statutory Stakeholder

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

SHARE

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.

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I would like to share

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Including all associated Organisations/Contacts

Yes

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Luke's Project

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NEXT

Contact Name

Contact Political Party

Organisation Name

Organisation Account Handlers

Contact Categories

Select options

Contact Stakeholder Categories

Select options

Organisation Sectors

Select options

SUBMIT

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Contacts (1)

<input checked="" type="checkbox"/>	ID	Contact	Preview	Organisation(s)	Email	Stakeholder Categories
<input checked="" type="checkbox"/>	6702	Grattin, Luke		HSBC Tractivity LTD	luke.gratton@tractivity.co.uk	Statutory Stakeholder

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

SHARE

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.



Share Successful

From Project	Luke's Project
Into Project	Luke's Project - Child Demo
Number of Organisations Shared	2
Number of Contacts Shared	1

SHARE MORE



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