

Tractivity[®] Help Guides

Tractivity Release 23.2

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Included in the release are the following features:

- Survey module will now include the ability to filter responses and create views, select chart types (bar, pie and line) and export.
- Have the ability to link multiple organisations or contacts to an activity, without the need of using an enquiry.
- When creating an Contact/Organisation activity you can now select multiple sub projects.
- When creating an email template, you can now add images to the body of your text. Perfect for creating email templates, which you may wish to include a different email signature.
- We have now also added more reports for you to enjoy:
 - Events > All Attendees to Past Events
 - Mailshots > Monthly New Subscribers by Global Interest
 - Mailshots > Monthly Cumulative Subscribers by Global Interest
 - Updated report – Contacts > All Contacts report (Added 'Created Date', 'Created By' and 'Generic Position' columns)

Analyse Response Data

On the **View Survey** screen, you will notice a new option on the left-hand menu titled **Analyse Responses**

- 1. **Apply New Rule**, select the filters you would like to use to segment your responses and the questions you would like to see.
- 2. **Filters**, you can select your filters here from specific questions, demographics, confirmed responses or even date range of when responses were received.
- 3. **Show**, you can select the questions and response data that you would like to see within your filtered view.
- 4. **Save View**, click to save your view and apply a descriptive title so you know which filters you have applied.
- 5. **Export**, to excel or word – this will email you the report once generated.

Surveys: Analyse Responses

Survey:
- View Survey

Analytics:
- Saved Views

Search:
- Surveys

Survey Title

We need your Feedback Tractivity 2023

Versions

Version 1

Saved Views

Default View (Standard rules applied)

Rules Applied

Filter

Unconfirmed and Confirmed responses

Edit

Remove

Show

All Pages, all Questions

Edit

Remove

APPLY NEW RULE

SAVE VIEW

EXPORT

Currently Displaying: Page 1

1

4

5

Q1. How do you rate our Customer Engagement?

Chart Type

Display Options

☐ Apply to all (some may not change)

SAVE

CANCEL

100%

90%

80%

70%

60%

50%

40%

30%

20%

10%

0%

1

2

3

4

5

6

7

8

9

10

Option	Total	%	Valid %
1	1	8.33%	8.33%
2	0	0%	0%
3	0	0%	0%
4	0	0%	0%
5	0	0%	0%
6	2	16.67%	16.67%
7	2	16.67%	16.67%

Select a Saved View

To access saved views to access previously filtered response data, simply;

- 1. Select a **Saved View**, via the left-hand menu on the **Analyse Responses** screen.
- 2. Select the **Title** of the saved View to view and Analyse this filtered data on screen.
- 3. Choose **Export** to be emailed a copy of the report in PDF or Word format.
- 4. Select **Archive** if you wish to remove the Saved View from your list.

Surveys: Analyse Responses

Survey:

- View Survey

Analytics:

- Saved Views

Search:

- Surveys

Survey Title

We need your Feedback Tractivity 2023

Versions

Version 2 (Current Version) ▾

Saved Views

Default View (Standard rules applied) ▾

Rules Applied

Filter

Unconfirmed and Confirmed responses

Edit

Remove

Show

All Pages, all Questions

Edit

Remove

APPLY NEW RULE

SAVE VIEW

EXPORT

Surveys: Saved Views

Survey:

- View Survey

Analytics:

- Analyse Responses

Search:

- Surveys

Title	Version	Last Edited	Last Edited By		
Opinion 6	2	26/05/2023	Hull, Anthony	Export	Archive
Page 1 Q1 and Q5	2	26/05/2023	Hull, Anthony	Export	Archive
Tractivity View	1	30/05/2023	Adamson, Vicky	Export	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

Select a Chart type

You can change the chart type and configurations that you would like to see per question within your Survey, to do this simply;

1. Select a **Chart Type**, choose from Bar, line or other charts and click **Save**
2. Select **Display Options**
3. Choose to show or hide the Chart, Data Table (providing total response numbers) or remove zero-responses from displaying.
4. Tick **Apply us all**; will mean each question is updated to reflect the preferences selected here.
5. View your **Chart Type** here
6. View your **Data Table** Statistics here

1

Q1. How do you rate our Customer Engagement?

Chart Type Display Options

☐ Apply to all (some may not change)

SAVE CANCEL

5

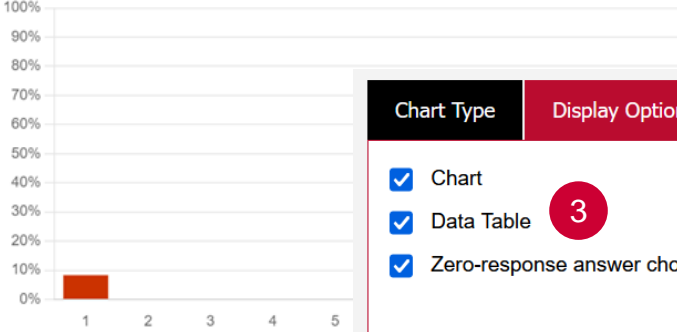
Chart Type Display Options 2

☒ Chart 3
☒ Data Table
☒ Zero-response answer choices

☐ Apply to all (some may not change) 4

SAVE CANCEL

6



Option	Total		
1	1		
2	0	0%	0%
3	0	0%	0%
4	0	0%	0%
5	0	0%	0%
6	2	16.67%	16.67%
7	2	16.67%	16.67%
8	2	16.67%	16.67%
9	2	16.67%	16.67%
10	3	25%	25%
Answered	12	100%	-
Not Answered	0	0%	-

Assign multiple Contacts to an Activity

- 1. Link your activity to multiple contacts

Organisations & Contacts: Add Contact Activity

Contact:

[View Contact](#)

Search:

[Organisations & Contacts](#)

Title *

Associated Contact(s) *

Abrahams, Jak

LINK ANOTHER CONTACT

Associated Organisation(s) *

Select options

Activity Type *

--select--

Status *

--select--

Priority *

Normal

Sub Projects

Select options

Notes

Agreement Notes

Allocated To Teams *

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

1 selected

Owner Teams *

(Team who may edit)

2 selected

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)

30/05/2023

Not Set

Not Set

☐ All day event

End Date *

(dd/mm/yyyy)

30/05/2023

Not Set

Not Set

Add reminder?

☐

SAVE

CANCEL

Assign multiple Contacts to an Activity

Link an activity to multiple contacts or Organisations

- 1. Search using the search boxes
- 2. Tick the stakeholders
- 3. Click Link Selected Contacts

Link Contact(s)

Contact Name

Bailey, Janet

Organisation Name

SEARCH

CLEAR

	Contact	Organisation(s)	Email	Job Title
<input type="checkbox"/>				
<input checked="" type="checkbox"/>	Bailey, Janet	Birchover	janetbailey86@gmail.com	Clerk

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

LINK SELECTED CONTACTS

CANCEL

1

2

3

Assign multiple contacts to an Activity

All Organisations linked to any of the contacts, will be shown here.

1. By ticking an associated Organisation(s), the activity will also appear when viewing that specific Organisation on the View Organisation Screen

Organisations & Contacts: Add Contact Activity

Contact:

- [View Contact](#)

Search:

- [Organisations & Contacts](#)

Title *

Meeting Monthly Focus Groups

Associated Contact(s) *

Abrahams, Jak
Bailey, Janet [Remove](#)
Bloggs, Joe [Remove](#)

[LINK ANOTHER CONTACT](#)

Associated Organisation(s) *

2 selected

Activity Type *

Status *

Priority *

Sub Projects

Notes

Filter:

☒ Check all ☒ Uncheck all

☒ Birchover
☒ Staffordshire County Council

Select multiple Sub Projects

When adding a contact or an Organisation activity you can now select multiple Sub Projects.

This will be useful for Organisations or Contacts that have an interest in more than one project.

Organisations & Contacts: Edit Contact Activity

Activity:

- View Activity

Contact:

- View Contact

Search:

- Organisations & Contacts

Title *	<input type="text" value="Test Completed activity"/>
Associated Contact(s) *	<div>Abbotts, Rachel Bryan, Joel Remove</div> <div>LINK ANOTHER CONTACT</div>
Associated Organisation(s) *	<input type="text" value="2 selected"/>
Activity Type *	<input type="text" value="Email Invitation Sent"/>
Status *	<input type="text" value="Completed"/>
Priority *	<input type="text" value="Normal"/>
Sub Projects	<div>Select options</div> <div><div>Filter: <input type="text" value="Enter keywords"/></div><div><input checked="" type="checkbox"/> Check all <input checked="" type="checkbox"/> Uncheck all</div><div><div><input type="checkbox"/> Mental Health</div><div><input type="checkbox"/> Pathology</div><div><input type="checkbox"/> Policy Contact Group</div><div><input type="checkbox"/> Radiology</div><div><input type="checkbox"/> Sheffield</div><div><input type="checkbox"/> Stroke</div><div><input type="checkbox"/> Sub Project B</div></div></div>

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

Add Images to an Email Template

If you wish to add an image to an email, you will need to click on the **Email Module** and select **Add Email Template** from the left-hand menu.

Email: Add Email Template

Add New:

- Write Email

Email:

- Sent Emails
- Email Templates

Title*

Body*

Email Template

B

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Arial

▼

12px

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▼

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OK

CANCEL



Vicky Adamson
Client Relationship Manager



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