Tractivity® Help Guides

Tractivity Release 23.2

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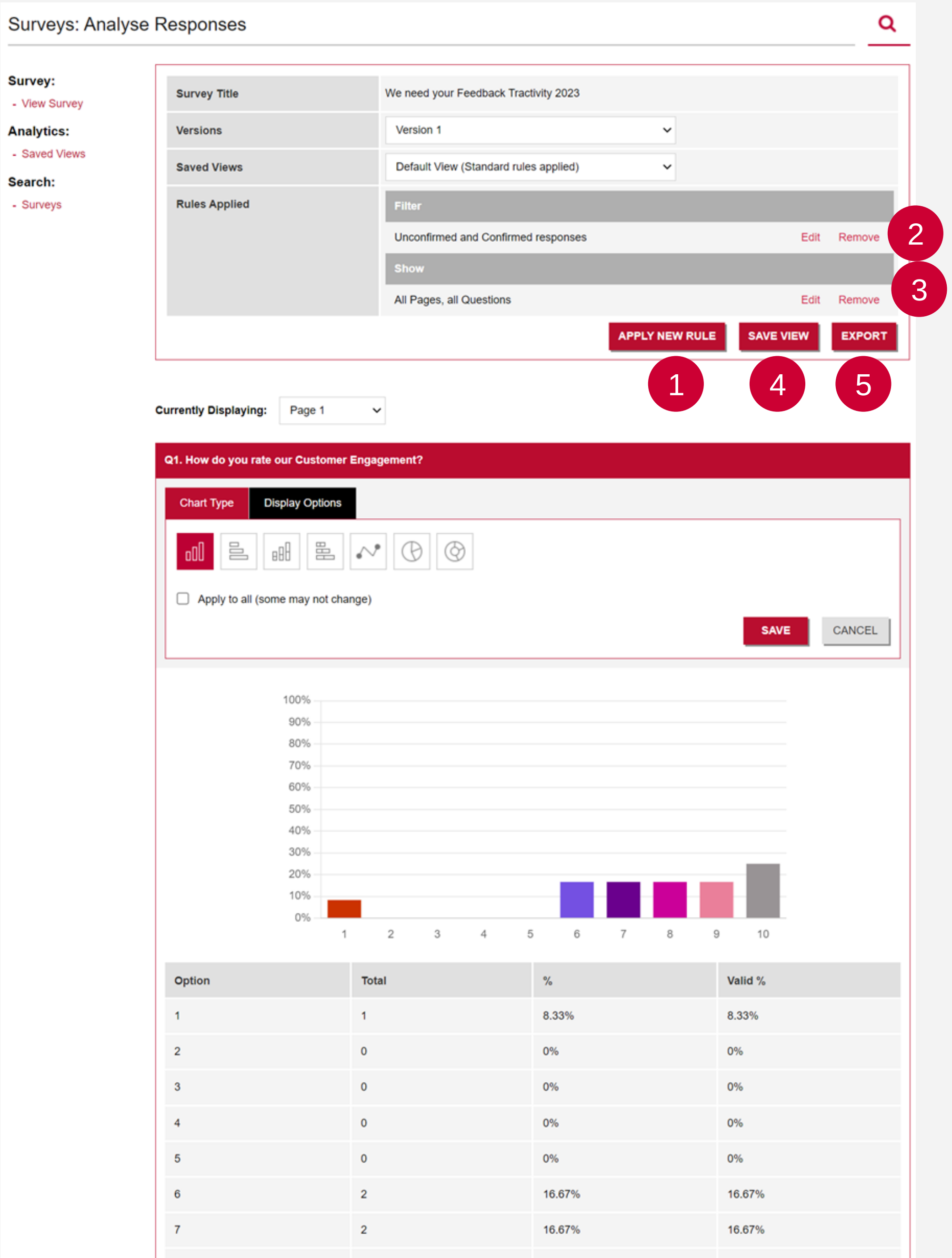
Included in the release are the following features:

- 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**

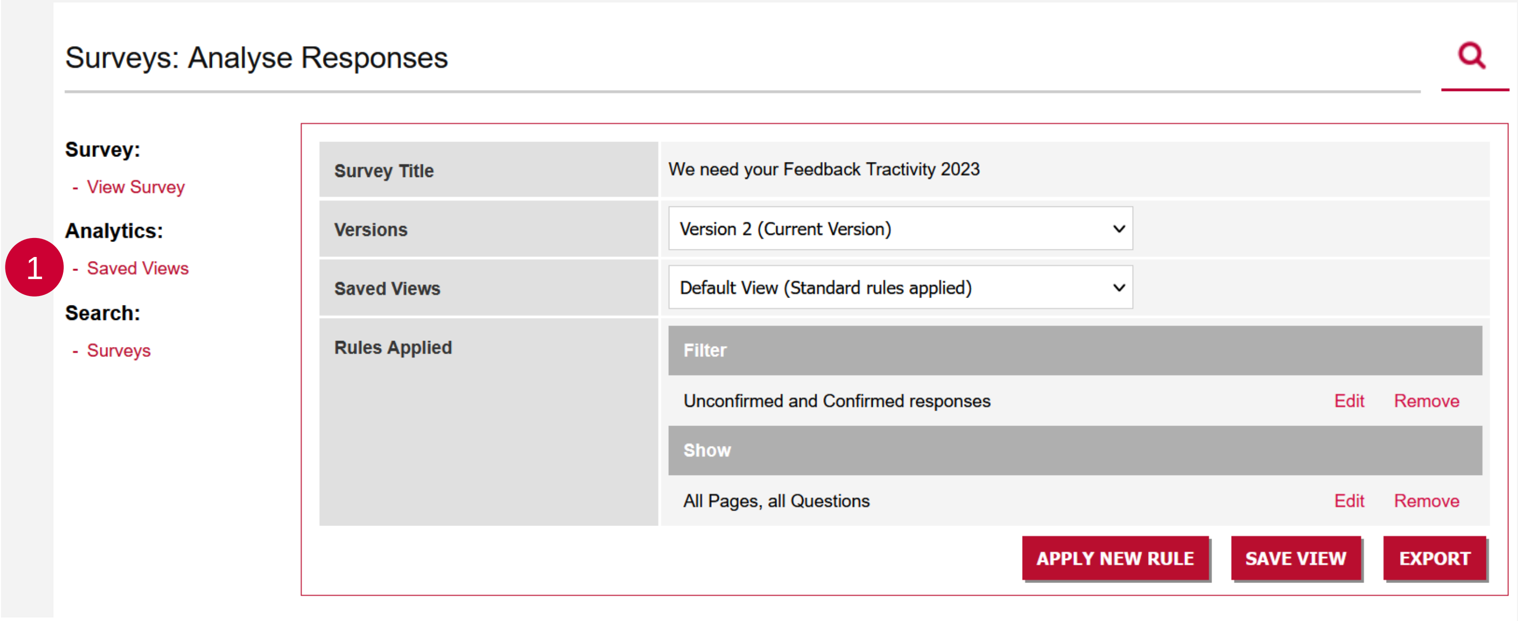
1. **Apply New Rule,** select the filters you would like to use to segment your responses and the questions you would like to see.
2. **Filters**, you can select your filters here from specific questions, demographics, confirmed responses or even date range of when responses were received.
3. **Show,** 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.

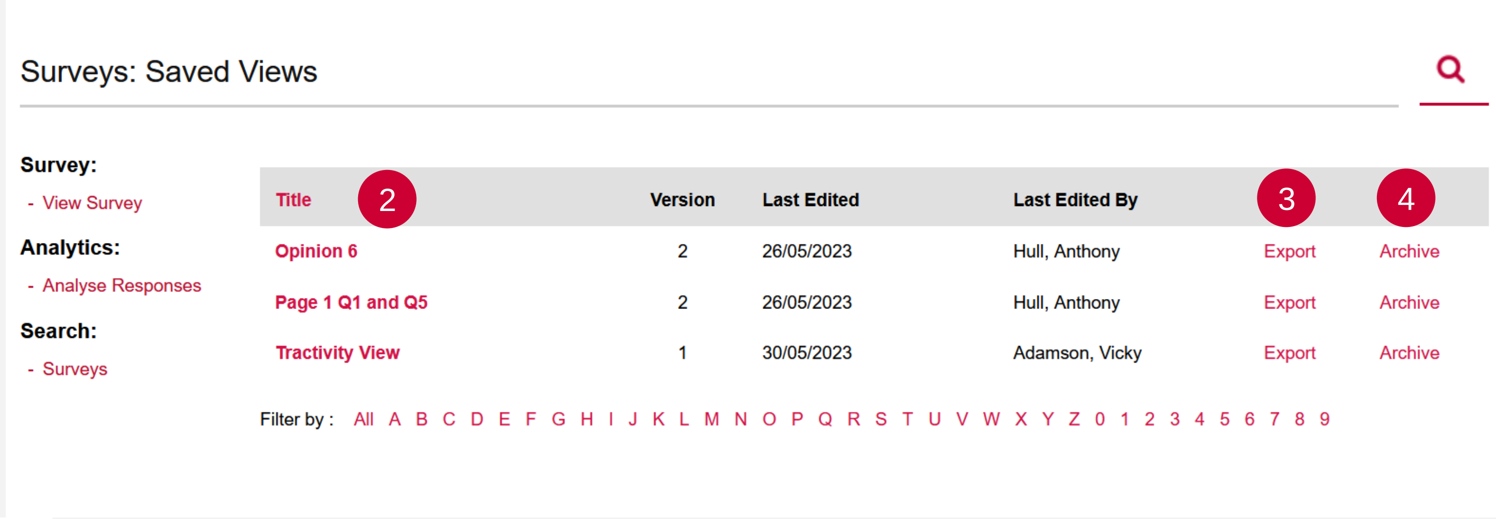


Select a Saved View

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.

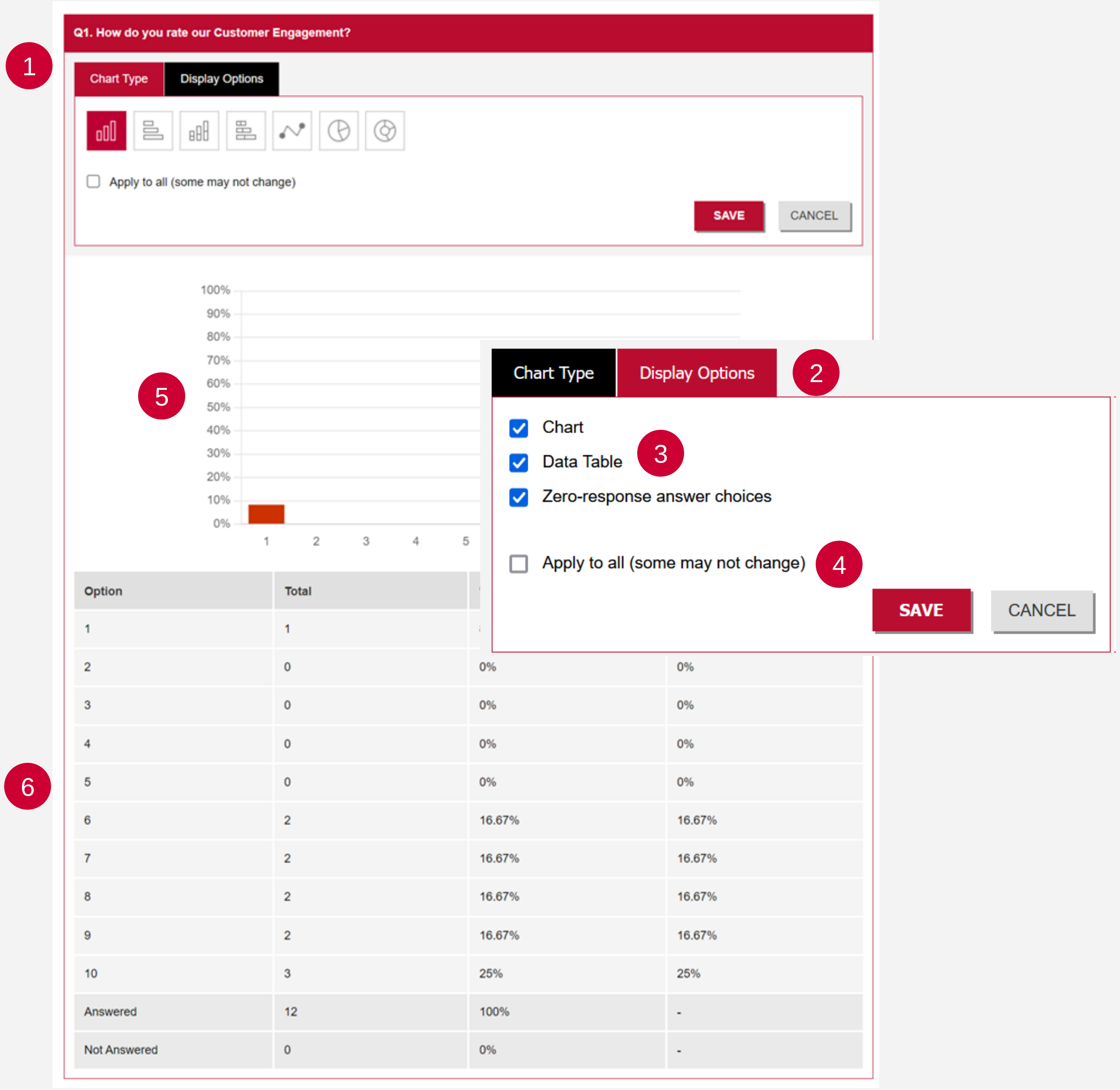




Select a Chart type

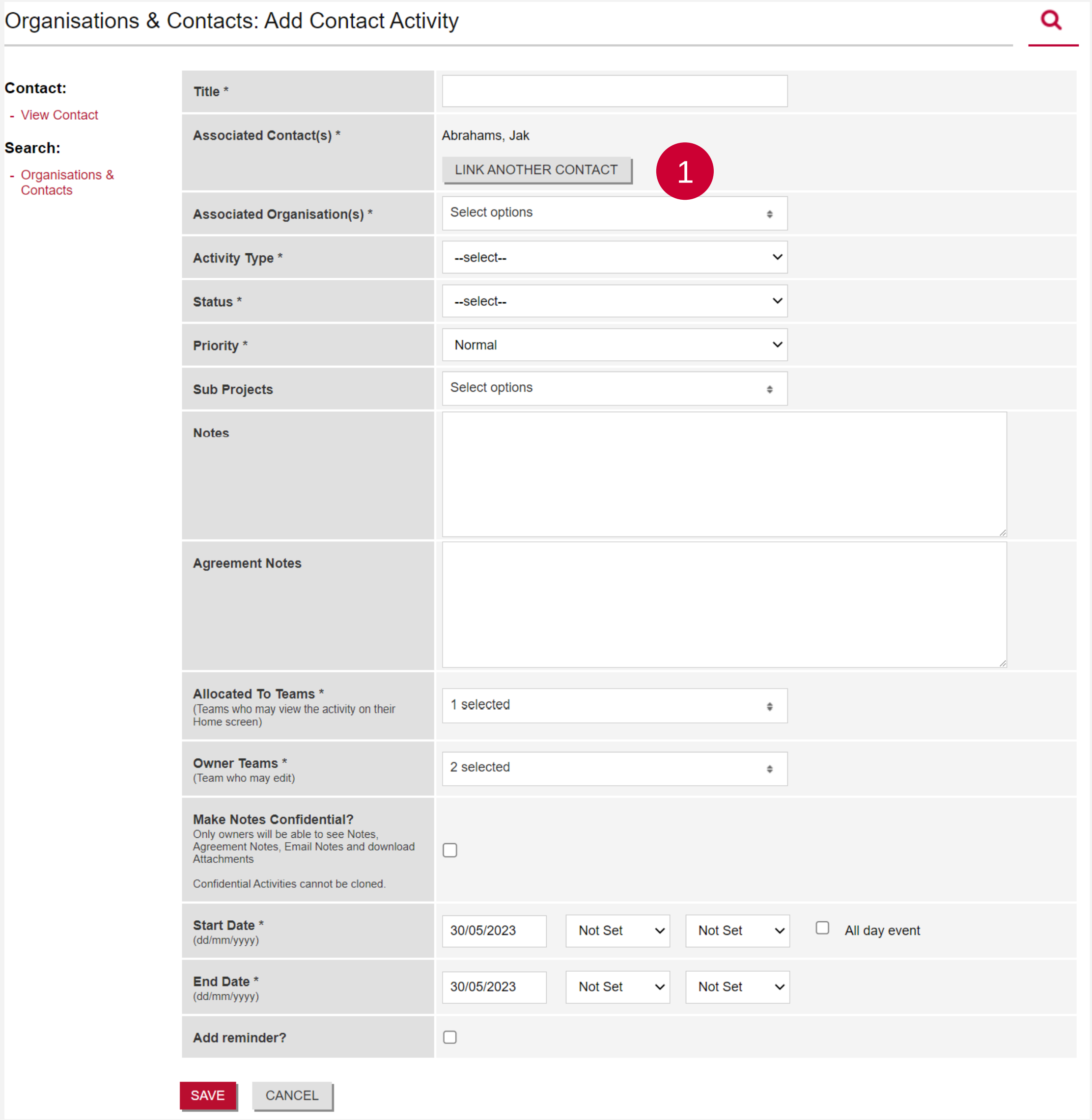
You can change the chart type and configurations that you would like to see per question within your Survey, to do this simply;

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



Assign multiple Contacts to an Activity

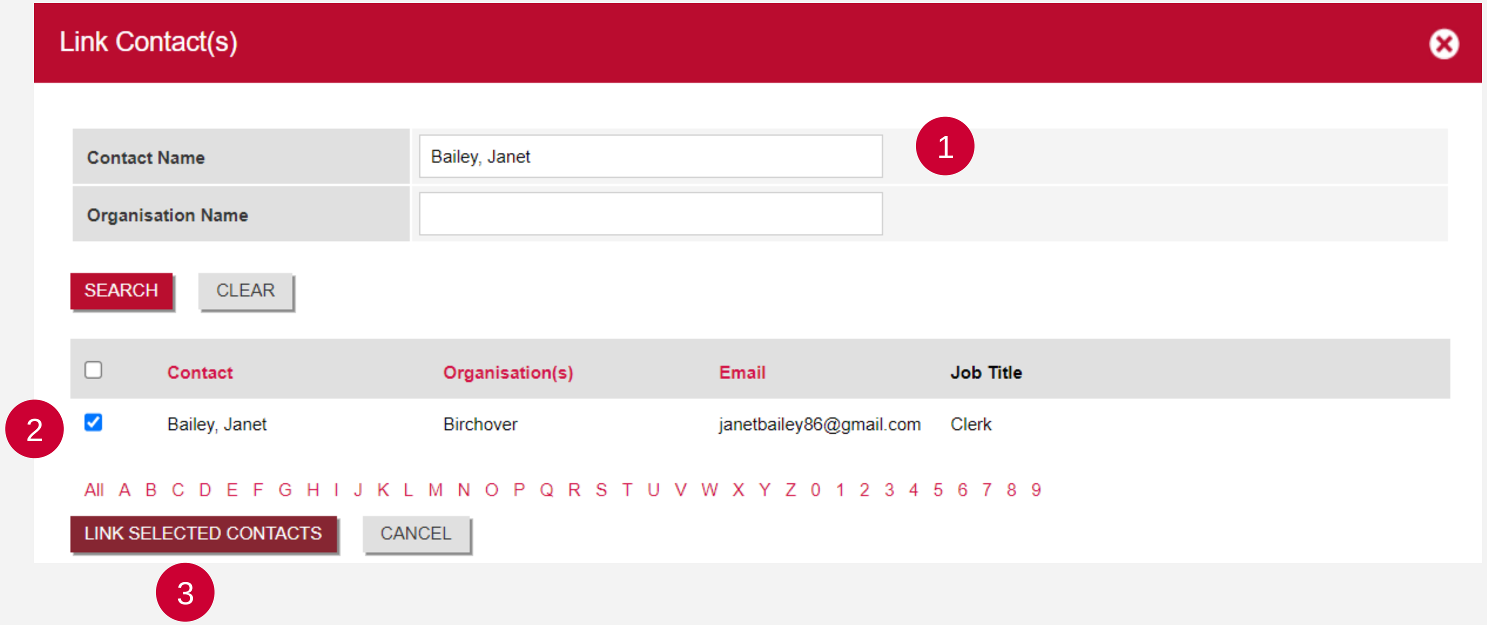
1. Link your activity to multiple contacts



Assign multiple Contacts to an Activity

Link an activity to multiple contacts or Organisations

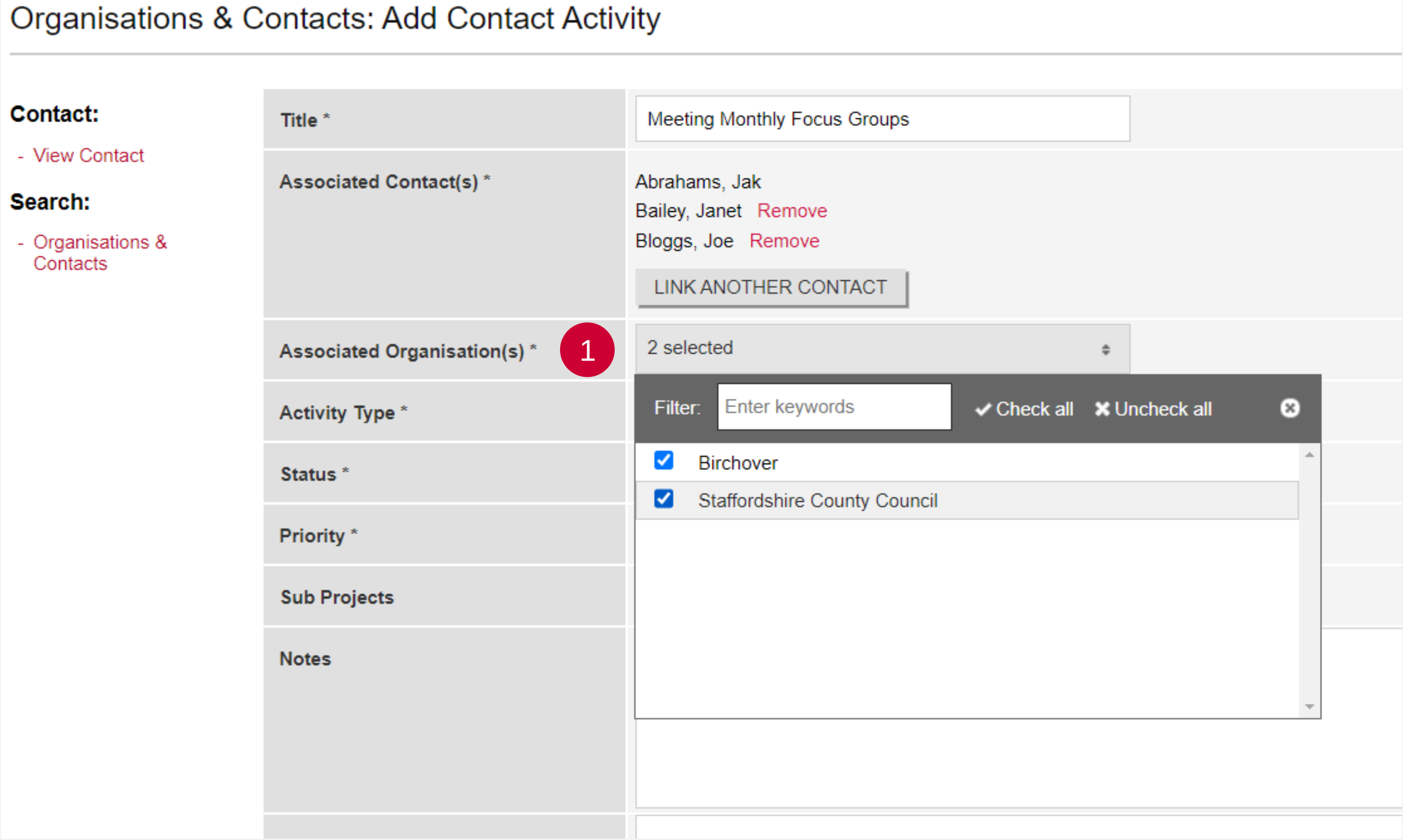
1. Search using the search boxes
2. Tick the stakeholders
3. Click Link Selected Contacts



Assign multiple contacts to an Activity

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

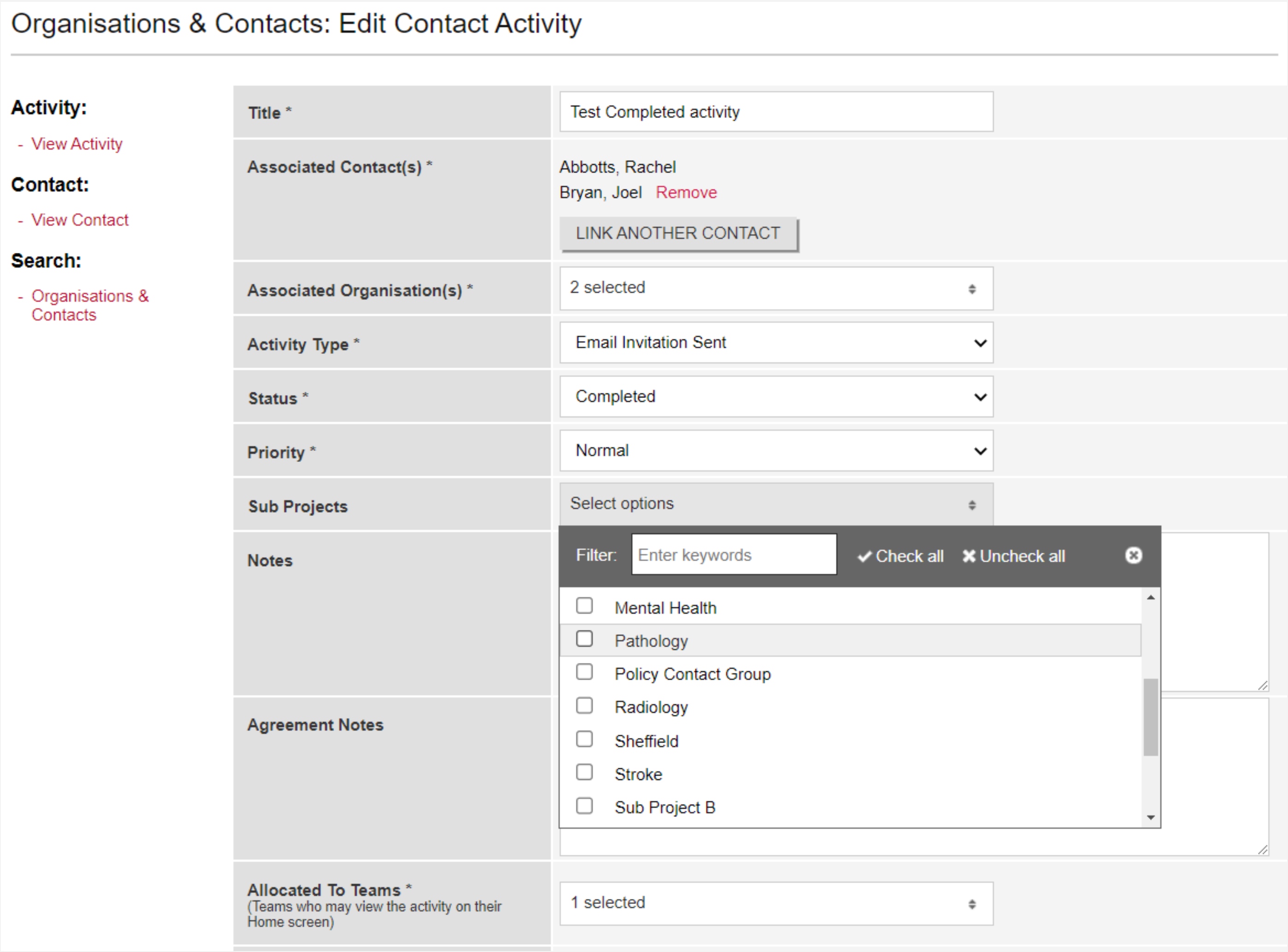
1. By ticking an associated Organisation(s), the activity will also appear when viewing that specific Organisation on the View Organisation Screen



Select multiple Sub Projects

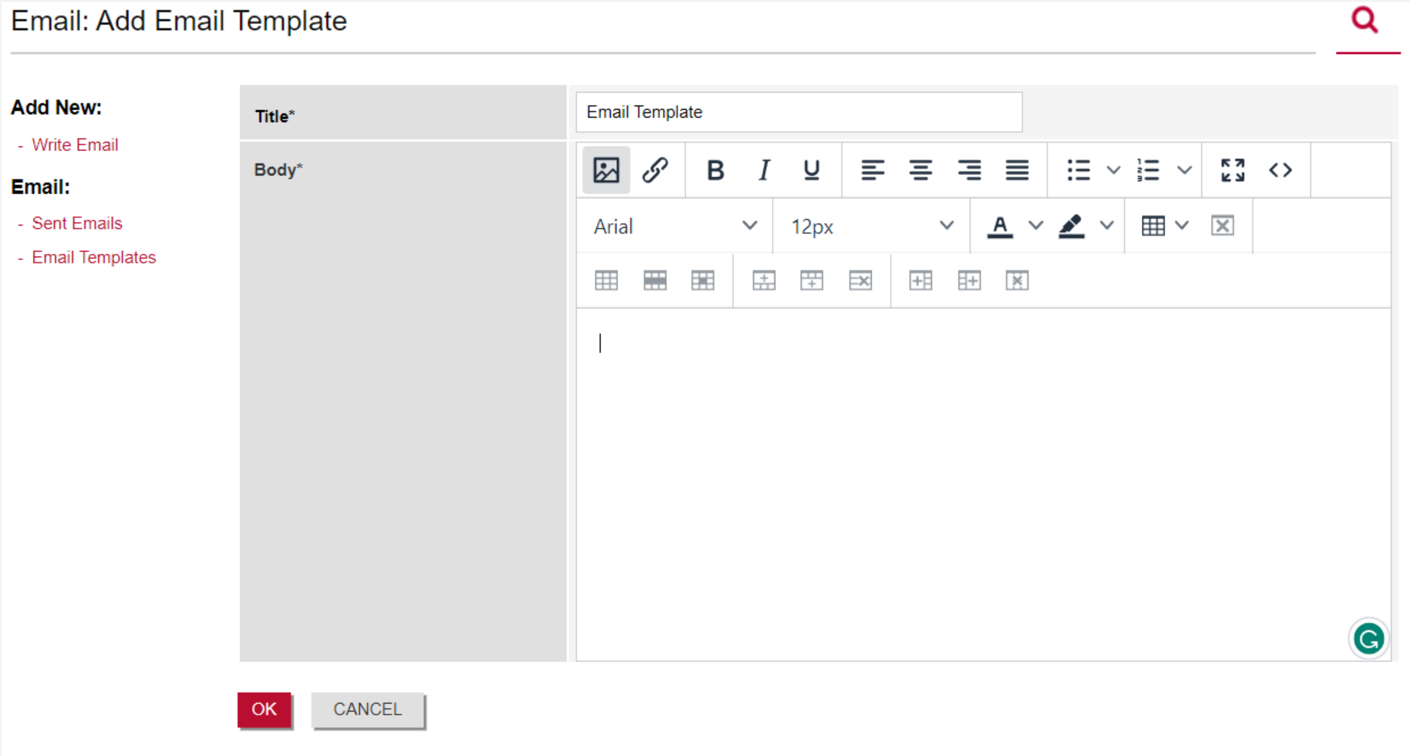
When adding a contact or an Organisation activity you can now select multiple Sub Projects.

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



Add Images to an Email Template

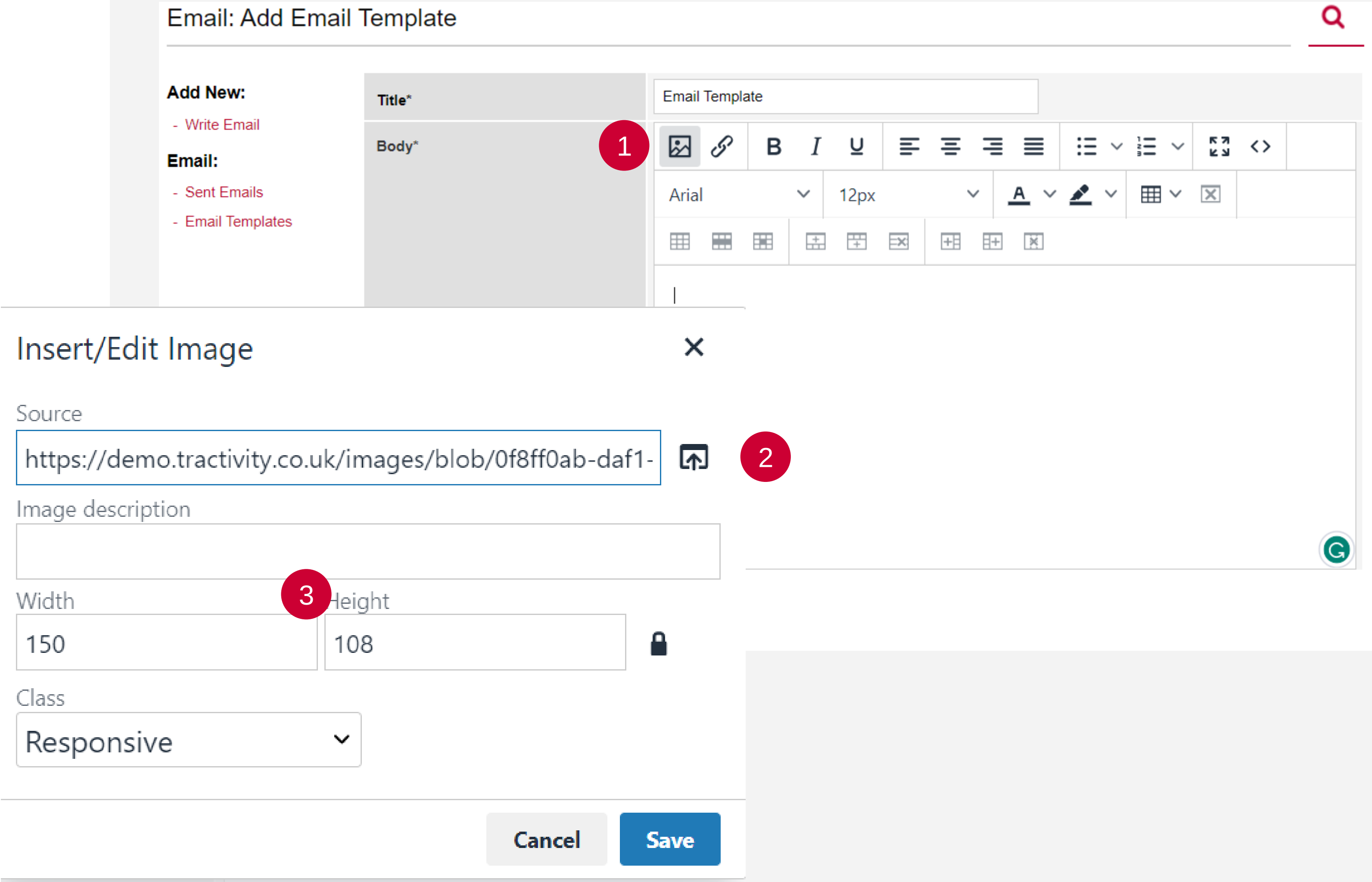
If you wish to add an image to an email, you will need to click on the **Email Module** and select **Add Email Template** from the left-hand menu.



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.

1. Click on the image icon
2. Upload an image
3. Resize the image (note an image can only be made smaller)



Vicky Adamson

Client Relationship Manager

Systems House, Deepdale Business Park, Bakewell, Derbyshire, DE45 1GT. www.tractivity.co.uk