

**Tractivity**<sup>®</sup> Help Guides

# Events

# Tractivity Events

**Below is a quick overview of all the features inside the Tractivity Events Module.**

- Create an event
- Add Invitees
- Send a branded email Invitation using our Email Builder
- Advertise your Event on your website with our free API
- Manage invitees responses, including any attendee special requests
- Control & monitor the reservation list, should your event exceed the maximum capacity
- Create Name Badges, Sign-in sheets, Delegate lists (with a click of a button no admin or copying & pasting required)
- Log who attended, along with any feedback received

# Search for Past Events

Inside the events module, a search screen is shown, allowing you to search for any previous events added to your Tractivity system.

Use the search screen features listed below, to find existing events:

- 1. Press **SUBMIT**, to return all existing events.
- 2. The total number of events recorded inside Tractivity will be indicated here.
- 3. Remember use the **COG** icon to amend the information being displayed here.

Events: Search

Add New:

- Add Event

Search:

- Events

Name

Statuses

Select options

Administrators

Select options

Categories

Select options

Event Start Date

to

SUBMIT

SETTINGS

SAVE SEARCH

CLEAR

Events (28)

Saved Searches (0)

EXPORT RESULTS

Title	Category	Start Date	Status	Edit	Archive
CEO Panel - September	Meeting	26/09/2019	Pending	Edit	Archive
CFP - Connections Services	Meeting	16/10/2019	Pending	Edit	Archive
CFP - Environment	Forum	05/08/2019	Pending	Edit	Archive
CFP - Safety	Meeting	18/09/2019	Pending	Edit	Archive
CFP Innovation	Meeting	01/10/2019	Pending	Edit	Archive
Cross stitch competition	Exhibition	04/11/2019	Pending	Edit	Archive
Everything EV - Adriana presenting	Conference	04/06/2019	Completed	Edit	Archive
Future of energy	Conference	01/10/2019	Pending	Edit	Archive
Help us celebrate the 70th birthday of the NHS!	Conference	27/01/2019	Pending	Edit	Archive
Ian Cameron SECV Story no. 1	Meeting	01/10/2019	Pending	Edit	Archive
Mark Ranger - SECV - New Fund for Customers	Focus Group	29/02/2020	Pending	Edit	Archive
Monthly industry meeting with Ofgem	Meeting	11/09/2019	Pending	Edit	Archive
NECS Exhibition	Conference	09/09/2019	Pending	Edit	Archive
No Jamie	Exhibition	02/12/2019	Pending	Edit	Archive
Old Event	Conference	16/09/2019	Pending	Edit	Archive

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

# Event Invitations

It's important to understand that the Event invitation has three parts when inviting stakeholders.

1. **Email Event Invitation**, you can enter the content of your event invitation, which includes a button titled *'Please let us know if you can attend.'* for each stakeholder to read.
2. **Preview Accept/Decline Page** will appear once the *'Please let us know you can attend'* is clicked. This allows invitees to confirm their attendance and add any special requests.
3. **Event Registration Page** will appear if registration is switched on for your event. This looks the same as the *Preview Accept/Decline Page*, but includes a button titled **Register for Event**. This available when you share your event URL or forward an event invite on to other possible invitees.

Invitation to Event 25 Month 2019

Tractivity Feedback  
Have Your Say

Stakeholder Meeting

21 September 2021 — 08:00 - 16:00

Speakers for the event will be

John Smith

Anne Beans

Trevor Painter

Events - Link a Surv...

[INVITEE NAME], please let us know if you would like to attend this event

☒ Yes, I would like to attend

☐ No, I do not wish to attend

Submit Response

Tractivity Feedback  
Have Your Say

Stakeholder Meeting

21 September 2021 — 08:00 - 16:00

Speakers for the event will be

John Smith

Anne Beans

Trevor Painter

Events - Link a Surv...

To attend this event, please click the below registration button and remember to add the event details to your calendar.

Register For Event

# Add a New Event

- 1. From the events module, on the left-hand menu select **Add Event**.

1

**Add New:**  
- Add Event

**Search:**  
- Events

## Events: Search

Name	<input type="text"/>	Categories	Select option
Statuses	Select options	Event Start Date	<input type="text"/>
<div>SUBMIT   SETTINGS   SAVE SEARCH   CLEAR</div>			

Events (3)   Saved Searches (0)

Title	Category ⚙	Start Date ⚙	End Date ⚙	E
Introduction to Quality Improvement	Forum	25/09/2019	25/09/2019	E
Market Insight Briefing	Meeting	03/09/2019	03/09/2019	E
Measurement for Improvement	Focus Group	03/09/2019	03/09/2019	E
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				

# Main Details

The information highlighted in **red**, automatically populates the Preview Accept/Decline Page & Registration Page.

Remember, if you wish to switch on any fields shown on this slide please speak to your system administrator.

- 1. **Title**, what's your event called?
- 2. **Sub Project**
- 3. **Phase**
- 4. **Event Category, Event Themes**, drill down into more detail about your events. Perfect, for reporting on what type of events you hosted and what key areas/projects you covered.
- 5. **Start & End Date/Time**, the dates and time that the event is taking place

MAIN DETAILS			
1	Title *	Stakeholder Meeting	
2	Sub Projects	Select options	
3	Phase	Phase 1	
4	Event Category	Cat 1	
	Event Themes	Select options	
	Start Date *(dd/mm/yyyy)	30/09/2021	
5	End Date *(dd/mm/yyyy)	30/09/2021	
	Start Time *	09	00
	End Time *	11	00

# Event Types

Depending on how you're are hosting your event, Tractivity provides three options via the **Event Type** field.

**Option 1. Face-to-Face**, an event held in person at a venue.

**Option 2. Online Event – MS Teams**, using Microsoft Teams Integration.

**Option 3. Online Event - Other**, using any other online platform such as Teams, Webex GoMeeting or Teams without the integration.

1

MAIN DETAILS		
Title *	<input type="text" value="Stakeholder Event 2022"/>	
Sub Projects	<input type="text" value="1 selected"/>	
Phase	<input type="text" value="--select--"/>	
Event Category *	<input type="text" value="Conference"/>	
Event Themes	<input type="text" value="Select options"/>	
Start Date *(dd/mm/yyyy)	<input type="text" value="20/04/2022"/>	
End Date *(dd/mm/yyyy)	<input type="text" value="20/04/2022"/>	
Start Time *	<input type="text" value="10"/>	<input type="text" value="00"/>
End Time *	<input type="text" value="16"/>	<input type="text" value="00"/>
Event Type	<input type="text" value="Online Event – Other"/>	
Online Meeting Url	<input type="text" value="https://zoom.us/j/96795683483?pwd=WHUwdVE0UE1Lt"/>	
Additional Join Instructions Please enter any other details required to join the meeting such as telephone numbers, pass codes or passwords.	<div>Please join 5 minutes before the event starts</div>	

# Event Type - Face to Face


1. If an event is held in person at a **venue**, **Event Type - Face to Face Event** should be selected.
2. Allowing you to add a **Venue** address. Don't worry the venue address is displayed when a stakeholder confirms their attendance to your event
3. By adding a **Town**, this will be shown when you promote your event as some stakeholders may only wish to attend events nearby.

MAIN DETAILS			
Title *	Stakeholder Meeting		
Sub Projects	Select options		
Phase	Phase 1		
Event Category	Cat 1		
Event Themes	Select options		
Start Date *(dd/mm/yyyy)	30/09/2021		
End Date *(dd/mm/yyyy)	30/09/2021		
Start Time *	09	00	
End Time *	11	00	
1 Event Type	Face-to-Face Event		
2 Venue *	Systems House, Deepdale Business Park, Bakewell *		
3 Town	Bakewell		
Postcode *	DE45 1GT *Postcode Lookup[?]		



## Event Type : Online Event MS Teams

1. **Online Event – MS Teams** is great for clients who wish to integrate with their MS Teams platform. Selecting this option will mean no copying and pasting meeting links, joining instructions and passcodes. A seamless event is created both inside Tractivity and in your outlook calendar, once you complete this screen and hit save.
2. **To setup Teams Integration, please click Login to MS Teams icon and follow the instructions.** When selecting to integrate with Microsoft teams you will see a Permissions Requested pop-up. Please ensure you speak with your internal IT or Security teams to check you have approval to accept these permissions.

MAIN DETAILS			
Title *	How to Manage Stakeholder Engagement		
Event Category *	Online Conference ▼		
Start Date *(dd/mm/yyyy)	12/01/2021		
End Date *(dd/mm/yyyy)	12/01/2021		
Start Time *	10 ▼	00 ▼	
End Time *	11 ▼	30 ▼	
Event Type	Online Event – MS Teams ▼	 LOGIN TO MS TEAMS	
Event Capacity	20		
Request Special Requirements * <small>Do you want to ask invitees for any special requirements when they accept an invitation?</small>	Yes ▼		
Administrator *	Tunncliffe, Anna ▼		

# Event Type : Online Event - Other

1. **Event Type – Online Event - Other** can be used for those who are unable to integrate with Teams or wish to use an alternate online meeting platform, such as Zoom, Cisco WebEx or GoToMeeting.
2. Simply add your **URL**
3. Add any accompanying **joining instructions**

- 1
- 2
- 3

MAIN DETAILS		
Title *	<input type="text" value="Stakeholder Event 2022"/>	
Sub Projects	<input type="text" value="1 selected"/>	
Phase	<input type="text" value="--select--"/>	
Event Category *	<input type="text" value="Conference"/>	
Event Themes	<input type="text" value="Select options"/>	
Start Date *(dd/mm/yyyy)	<input type="text" value="20/04/2022"/>	
End Date *(dd/mm/yyyy)	<input type="text" value="20/04/2022"/>	
Start Time *	<input type="text" value="10"/>	<input type="text" value="00"/>
End Time *	<input type="text" value="16"/>	<input type="text" value="00"/>
Event Type	<input type="text" value="Online Event – Other"/>	
Online Meeting Url	<input type="text" value="https://zoom.us/j/96795683483?pwd=WHUwdVE0UE1Lt"/>	
Additional Join Instructions Please enter any other details required to join the meeting such as telephone numbers, pass codes or passwords.	<div>Please join 5 minutes before the event starts</div>	

# Main Details of your Event

The information highlighted in **red**, automatically populates the Event Accept/Decline Page Response Page:

- 1. Event Capacity** - is there a limit to the number of attendees? If so, please add the maximum capacity here.
- 2. Request Special Requirements**, allows each attendee to add their own comments in a free text box, from access or dietary requirements to a quick note.

1

2

MAIN DETAILS		
Title *	<input type="text" value="How to Manage Stakeholder Engagement"/>	
Event Category *	<input type="text" value="Online Conference"/>	
Start Date *(dd/mm/yyyy)	<input type="text" value="01/02/2026"/>	
End Date *(dd/mm/yyyy)	<input type="text" value="01/02/2026"/>	
Start Time *	<input type="text" value="10"/>	<input type="text" value="00"/>
End Time *	<input type="text" value="12"/>	<input type="text" value="00"/>
Event Type	<input type="text" value="Online Event – MS Teams"/>	<div>Your MS Teams meeting will be created when you save the event.</div>
Event Capacity	<input type="text" value="50"/>	
Administrator *	<input type="text" value="Rodgers, Thom"/>	
SPECIAL REQUIREMENTS / ADDITIONAL QUESTIONS		
Request Additional Special Requirements? *	<input type="text" value="Yes"/>	
<small>Do you want to ask invitees for any additional special requirements when they register for an event or accept an invitation?</small>		

# How do you wish to promote your event?

The next three sections of the **Add Event** screen, will be down to your personal preference on how you wish to advertise your event.

**Website & Invitation details**, information populated here will build a landing page & ICS Calendar file, for both your email invitees and new stakeholders to access when wishing to register for your event.

1. **Event Organisers Contact details**, include any contact details i.e. Organised By, Contact Name, Email and Telephone should you wish stakeholders to contact you directly about the event
2. **Event Overview**, it's important to understand that the information added here will only appear in the ICS Calendar file; which can be downloaded and saved within the invitee's calendar once they have booked onto the event. This adds the event details (e.g., date, time, location, Event Overview & Meeting URLs) to your attendee's calendar.

**WEBSITE & INVITATION DETAILS**

Event Organised By	Tractivity
Event Contact Name	Victoria Adamson
Event Email	Vicku.adamson@tractivity.co.uk
Event Telephone	07718864476
Event Website	www.tractivity.co.uk

**Event Overview**

Stakeholder Management Event - Don't Miss out on the limited spaces

**Event Information**

To create a new Paragraph press the ENTER key.  
To add a Line Break within a Paragraph press SHIFT+ENTER.

Speakers for the event will be

John Smith

Anne Beans

Trevor Painter

**Call To Action**

Text entered here will be populated within the Call to Action box on the View Event screen for public registrations.

# Website & Invitation details

1. Information populated inside **Event Information** will be the content shown on your event landing page which will be accessed by all stakeholders wishing to accept or register for your event. You can include video's, imagery, change the colour & font size. There is no limit to the information you can add inside this section.
2. **To add an image**, click the image icon. You can even reduce the size of the image by entering your desired width in the text box.
3. **To add a video**, click the video icon and add your shareable link. Your video will need to be uploaded onto hosting option first such as YouTube or Vimeo.
4. **To add a link**, add your text, highlight the text and click the link icon to add your website/URL.

WEBSITE & INVITATION DETAILS

Event Organised By

Tractivity

Event Contact Name

Victoria Adamson

Event Email

Vicku.adamson@tractivity.co.uk

Event Telephone

07718864476

Event Website

www.tractivity.co.uk

Event Overview

Stakeholder Management Event - Don't Miss out on the limited spaces




Event Information

To create a new Paragraph press the ENTER key.  
To add a Line Break within a Paragraph press

2

3


4




**B**

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Arial

Paragraph

12pt



A


Speakers for the event will be

John Smith

Anne Beans

Trevor Painter

 Events - Link a Surve... 



Insert/Edit Image

Source

https://demo.tractivity.co.uk/images/blob/eacf84b8-a13i





Image description

Width

900

Height

450



Class

Responsive

Cancel

Save

# Allow Registration

1. **Allow Event Registration** can be used for two main reasons
  - A. To advertise your event to people that are not currently inside your stakeholder database. Allowing you to share your event on social media or your website.
  - B. To allow invitees to forward invitations onto interested stakeholders enabling them to self-register.

If you wish to have the functionality to do either of the above, please ensure **Allow Registration** has **Yes** selected.

**Please note;** The next slide will only be relevant if Allow Registration has Yes selected.

1

EVENT REGISTRATION		
Allow Registration? *	<div>Yes</div>	
Request Organisation Name? *	<div>No</div>	
Request Postcode? *	<div>Yes</div>	<input type="checkbox"/> Mandatory
Request Demographic Data?	<div><div>Age Range</div><div>No</div></div> <div><div>Year of Birth</div><div>No</div></div> <div><div>Gender</div><div>No</div></div> <div><div>Does gender identity match sex as registered at birth?</div><div>No</div></div> <div><div>Currently pregnant or have been in the last year?</div><div>No</div></div> <div><div>Marital Status</div><div>No</div></div> <div><div>Disabled?</div><div>No</div></div> <div><div>Caring Responsibilities</div><div>No</div></div> <div><div>Ethnic Group</div><div>No</div></div> <div><div>Preferred Language</div><div>No</div></div> <div><div>Sexual Orientation</div><div>No</div></div> <div><div>Religion</div><div>No</div></div> <div><div>Political Party</div><div>No</div></div>	
Request Communication Preferences? *	<div>Yes</div>	
Request Consent to Share? *	<div>--select--</div>	

# Allow Registration

When **Allow Registration** has **Yes** selected, decide what information you wish to capture on the Registration form.

1. **Request Organisation Name?** Would you like to capture the Organisation linked to the stakeholder? Do you wish this to be mandatory?
2. **Request Postcode?** Do you need to collect participants postcodes, view on a map or in a report.
3. **Demographics**, remember you can only record the demographics currently recorded when you add a new contact to your system. Select Yes if you wish to collect the demographic and select whether this should be mandatory.
4. **Request Communication Preferences**, would you like to collect and record the stakeholders' communication preferences?
5. **Request Consent to Share?** Do you wish to ask participants if they are happy for their delegate information to be shared with other participants.

All registrations will be checked against your existing Tractivity database, checking for duplications and automatically adding new stakeholders into your system.

1

2

3

4

5

EVENT REGISTRATION		
Allow Registration? *	<div>Yes</div>	
Request Organisation Name? *	<div>No</div>	
Request Postcode? *	<div>Yes</div>	<input type="checkbox"/> Mandatory
Request Demographic Data?	Age Range	<div>No</div>
	Year of Birth	<div>No</div>
	Gender	<div>No</div>
	Does gender identity match sex as registered at birth?	<div>No</div>
	Currently pregnant or have been in the last year?	<div>No</div>
	Marital Status	<div>No</div>
	Disabled?	<div>No</div>
	Caring Responsibilities	<div>No</div>
	Ethnic Group	<div>No</div>
	Preferred Language	<div>No</div>
	Sexual Orientation	<div>No</div>
	Religion	<div>No</div>
Political Party	<div>No</div>	
Request Communication Preferences? *	<div>Yes</div>	
Request Consent to Share? *	<div>--select--</div>	

# Event Branding

All Events require the Event Branding section to be completed, regardless of how you wish to advertise your event.

1. **Banner Image**, Upload a banner for each event you host. Ensure the dimensions are 1300 pixels wide with a maximum height of 300 pixels.
2. **Primary & Text Colour**, type the preferred Hex colour or choose from the colour swatch available and click **select**.

1

**Banner Image**  
Upload a banner that will be displayed when registering for an event. Max Dimensions – 1300px x 300px

2

**Primary Colour**  

#d9d9d9

Text Colour

ADDITIONAL DETAILS

**Notes**  
(For internal use only - a summary of key points)

**Agreement Notes**  
(For internal use only)

**Owner Teams \***  
(Teams who may edit)

3 selected

Drag an image here  
or click to select

2

#d9d9d9

cancel Select

SAVE

BACK



# Add Event to Calendar

1. If you would like to add an event to your calendar or view the information that your invitees can download to their calendars' then click the **Add Event to Calendar** red button below.

### Events: View Event

**Add New:**

- Add Invitees
- Add Event Activity
- Add Event

**Event:**


- View Event
- Edit Event
- Clone Event
- Change Event Status
- Invitations Status List
- Link to Survey
- Archive Event

**Communicate:**

- Email Invitation
- Email All Invitees

**Search:**

- Events

Title	How to Manage Stakeholder Engagement through Technol	<div>Add Attachment</div> <div><p>Drag a file here or click to select.</p></div>
Sub Projects		
Status	Pending	
Event Category	Online Conference	
Start Date	29/09/2021 10:00	
End Date	29/09/2021 14:30	
Event Type	Online Event – Other	
Online Meeting URL	https://zoom.us/j/96795683483?pwd=WHUwdVE0UE1LbXQ1SE16czBUTHBQUT09 <a href="#">copy</a>	
Additional Join Instructions		
Event URL	https://re-url.uk/WE3F <a href="#">copy</a>	

1

ADD EVENT TO CALENDAR

PREVIEW REGISTRATION PAGE

PREVIEW ACCEPT/DECLINE PAGE

# Advertising your event on Social Media & Online

1. If **Allow Registration** is set to **YES**, use the preview button to view how your audience will register for your event.

Events: View Event

**Add New:**

- Add Invitees
- Add Event Activity
- Add Event

**Event:**


- View Event
- Edit Event
- Clone Event
- Change Event Status
- Invitations Status List
- Link to Survey
- Archive Event

**Communicate:**

- Email Invitation
- Email All Invitees

**Search:**

- Events

Title	How to Manage Stakeholder Engagement through Technol	<div>Add Attachment</div> <div><div>Drag a file here or click to select.</div></div>
Sub Projects		
Status	Pending	
Event Category	Online Conference	
Start Date	29/09/2021 10:00	
End Date	29/09/2021 14:30	
Event Type	Online Event – Other	
Online Meeting URL	<a href="https://zoom.us/j/96795683483?pwd=WHUwdVE0UE1LbXQ1SE16czBUTHBQUT09">https://zoom.us/j/96795683483?pwd=WHUwdVE0UE1LbXQ1SE16czBUTHBQUT09</a> copy	
Additional Join Instructions		
Event URL	<a href="https://re-url.uk/WE3F">https://re-url.uk/WE3F</a> copy	

ADD EVENT TO CALENDAR

PREVIEW REGISTRATION PAGE

PREVIEW ACCEPT/DECLINE PAGE

1

# View Registration Page

The Registration Page includes a **Register for Event** button (1)

When clicked an **Event registration Form** will appear. (2)

1

Tractivity Feedback

Have Your Say

Stakeholder Event 2022

20 April 2022 – 10:00 - 16:00

Status: SPACES AVAILABLE

Stakeholder Event 2021

Special Speakers for the events

John Jones

Debbie Wright

Paul Matthews

Enquiries - Adding an Enquiry

Tractivity Tutorials

Enquiries Module: Adding an Enquiry

Tractivity

Event Details

When: 20 April 2022 – 10:00 - 16:00

Status: Spaces Available

Location: Online

Organised By: Tractivity

Contact Name: Victoria Adamson

Telephone: [07718864476](tel:07718864476)

Email: [Vicky.adamson@tractivity.co.uk](mailto:Vicky.adamson@tractivity.co.uk)

Share:

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t

in

e

Please confirm your attendance by clicking the below Register button.

Register For Event

2

Tractivity Feedback

Have Your Say

Event Registration

Please register below to confirm your attendance at Stakeholder Event 2022.

First Name

First Name

\* Mandatory

Last Name

Last Name

\* Mandatory

Email

Email

\* Mandatory

Organisation Name

Organisation Name

Your postcode

Your postcode

☐ Do you have any special requirements for attending this event?

Communication Subscription Preferences

If you would like to receive further communications from us, please set your preferences below.

E-Newsletters

Please select --

\* Mandatory

Events

Please select --

\* Mandatory

☐ I have read, understand and agree to the [Privacy Policy](#)

\* Mandatory

Back

Register

# Advertise your event to your Stakeholder Database

When emailing an event invitation to known stakeholders, a button is added allowing attendees to confirm their attendance (1).

When clicked the attendees will see this page, to confirm their attendance and add any special requirements. (2)

2

Events: View Event

**Add New:**

- Add Invitees
- Add Event Activity
- Add Event

**Event:**

- View Event
- Edit Event
- Clone Event
- Change Event Status
- Invitations Status List
- Link to Survey
- Archive Event

**Communicate:**

- Email Invitation
- Email All Invitees

**Search:**

- Events

Title	How to Manage Stakeholder Engagement through Tech
Sub Projects	
Status	Pending
Event Category	Online Conference
Start Date	29/09/2021 10:00
End Date	29/09/2021 14:30
Event Type	Online Event – Other
Online Meeting URL	https://zoom.us/j/96795683483?pwd=WHUwdVE0UE1
Additional Join Instructions	
Event URL	https://re-url.uk/WE3F <a href="#">copy</a>

ADD EVENT TO CALENDAR

PREVIEW REGISTRATION PAGE

PREVIEW ACCEPT/DECLINE PAGE

1

Tractivity Feedback

Have Your Say

Stakeholder Meeting

21 September 2021 — 08:00 - 16:00

Status: SPACES AVAILABLE

Speakers for the event will be

John Smith

Anne Beans

Trevor Painter

Events - Link a Surv...

[INVITEE NAME], please let us know if you would like to attend this event:

☐ ☒ Yes, I would like to attend

☐ ☒ No, I do not wish to attend

Submit Response

Event Details

When:

21 September 2021 — 08:00 - 16:00

Status:

Spaces Available

Location:

Online

Organised By:

Tractivity

Contact Name:

Victoria Adamson

Telephone:

07718864476

Email:

[Vicku.adamson@tractivity.co.uk](mailto:Vicku.adamson@tractivity.co.uk)

Website:

[www.tractivity.co.uk](http://www.tractivity.co.uk)

Share:

# Add Event to Calendar

No matter how you share your event, or whether you do a mixture every stakeholder who confirms their attendance will see the following screen.

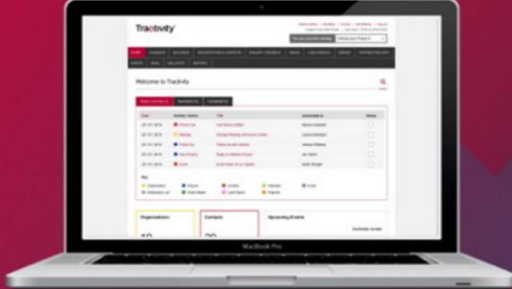
Participants can save the event to their calendar by clicking Add to Calendar.

All details of your event will be included, from meeting URL's times and meeting overview information on the Add Event Screen.

Top Tip - we recommend using email remind confirmed invitees prior to your event, where all emails will automatically include ICS.file to allow all attendees to re-download the event to their calendar (should they have forgot).

Tractivity® Feedback

Have Your Say



✓

Thank You!


You are attending Stakeholder Event 2022

As this is an event hosted online, you will need to click on the link below 10 minutes before the scheduled event start time.

[Click to join Online meeting](#)

Full join instructions are included within the Calendar Invitation that can be added to your calendar by clicking on the button below.

Date:  
Wednesday, 20 April 2022 — 10:00 - 16:00

 Add to Calendar

# Share Event URL

For events you wish to share to stakeholders outside of your Tractivity system copy the URL provided and embed into your website or add to social media channels. (1)

## Events: View Event

### Add New:

- Add Invitees
- Add Event Activity
- Add Event

### Event:

- View Event
- Edit Event
- Clone Event
- Change Event Status
- Invitations Status List
- Link to Survey
- Archive Event

### Communicate:

- Email Invitation
- Email All Invitees

### Search:

- Events

Title	How to Manage Stakeholder Engagement through Technol	Add Atta
Sub Projects		
Status	Pending	
Event Category	Online Conference	
Start Date	29/09/2021 10:00	
End Date	29/09/2021 14:30	
Event Type	Online Event – Other	
Online Meeting URL	https://zoom.us/j/96795683483?pwd=WHUwdVE0UE1LbXQ1SE16czBUTH	
Additional Join Instructions		
Event URL	https://re-url.uk/WE3F <span>copy</span>	

[ADD EVENT TO CALENDAR](#)[PREVIEW REGISTRATION PAGE](#)[PREVIEW ACCEPT/DECLINE PAGE](#)

# Advertise your event to your Stakeholder Database

If you wish to advertise your event to your existing stakeholder database, you may prefer to send a branded email with simple Accept/Decline links – with no need for your stakeholder to register their details.

1. To email existing stakeholders you need to firstly add these stakeholders to your event by clicking **Add Invitees**

## Events: View Event

### Add New:

- 1 - Add Invitees
- Add Event Activity
- Add Event

### Event:

- View Event
- Edit Event
- Clone Event
- Change Event Status
- Invitations Status List
- Link to Survey
- Archive Event

### Communicate:

- Email Invitation
- Email All Invitees

### Search:

- Events

Title	How to Manage Stakeholder Engagement through Technol	Add Attac
Sub Projects		
Status	Pending	
Event Category	Online Conference	
Start Date	29/09/2021 10:00	
End Date	29/09/2021 14:30	
Event Type	Online Event – Other	
Online Meeting URL	https://zoom.us/j/96795683483?pwd=WHUwdVE0UE1LbXQ1SE16czBUTH	
Additional Join Instructions		
Event URL	https://re-url.uk/WE3F copy	
ADD EVENT TO CALENDAR		PREVIEW REGISTRATION PAGE
		PREVIEW ACCEPT/DECLINE PAGE

# Add Invitees

1. Use the search boxes to find contacts recorded inside your Tractivity.
2. Click **Settings**, to add additional search boxes if required. Remember if you wish to invite everyone from your stakeholder database, click **Submit**
3. **Select All** contacts by ticking the tick box in the grey header or select individual contacts using the tick box next to their name.
4. Click the **ATTACH** button to add them to your Event Invitee list
5. All selected invites will appear in the Event Invitees box, once you are happy click **OK**.

Events: Add Invitees

Event:

[View Event](#)

Search:

[Events](#)

1

Organisation Name

Organisation ID

2

Organisation Stakeholder Categories

Select options

Contact Name

ad

Contact Stakeholder Categories

Select options

Contact Event Subscription

Select options

Contact Distribution List

Select options

Events

Select options

SUBMIT

SETTINGS

SAVE SEARCH

CLEAR

Contacts (5)

3

☐

Contact

Organisation

Email

Telephone

Attach

☐

Adams, Helen

helen@adams.co.uk

Attach

☐

Adams, Jenny

jenny.adams@noemail.co.uk

Attach

☐

Adamson, Vicky

vicky.adamson@tractivity.co.uk

01629 815915

Attach

☐

Adamson, Victoria

vic@trac.co.uk

Attach

☐

David, Adam

Coop Shop

Attach

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

ATTACH

Event Invitees

Contact

Organisation

Email

Telephone

Detach

Adams, Sarah

sarah.adams@manager.co.uk

01782 716552

Detach

Adams, Adam

adam.adams@stokeontrentco.uncil.co.uk

Detach

Adamson, Victoria

Tractivity Limited

victoria.adamson@tractivity.co.uk

01629 815902

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

5

OK

CANCEL



# Email Template

Using our new builder, you can customise the Email Invitations you send to your stakeholders.

To start with, you can create new Templates which are stored in the **Events** module, in a new area called **Email Templates**.

You can create as many Templates as you wish.  
Select Add Email Template to get started.

You can review all your existing Templates by selecting **All Email Templates**

## Please note:

You will have access to a **Blank** and **Demo** template to help you get started.

Using a **Blank** template means you can build your branded template from scratch.

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

## Events: Search



Add New:

- Add Event

- Add Email Template

Email Templates:

- All Email Templates

Search:

- Events

Event Name

Select options

Categories

Select options

Statuses

Select options

Event Start Date

to

SUBMIT

SETTINGS

CLEAR

Events

Saved Searches (0)

No Events to display

## SmartMailer: All Event Templates

Templates

Title	Created Date	Edit	Archive
Test - Tractivity Newsletter	24/04/2024	Edit	Archive
Event Template - Stakeholder Summit	24/04/2024	Edit	Archive
Blank	01/03/2024		
Demo Event Invitation	01/03/2024		

# Add a New Email Template

The below steps will explain how to create a new template for your invitations.

From the **My Mailshots** screen, from the **left-hand menu**, select **New Template** to start creating your own template.

1. Provide a **title** and select the option **Blank Template** (you will also have access to a **Demo Template**)
2. Click either **Save Template** or **Save & Edit Template** if you wish to start creating the template straight away

## Please note:

Clicking **Save Template** will now store this template within **All Templates**.

Clicking **Save & Edit Template** will take you to our new builder. Further insight on this will be provided throughout the guide under pages marked **Content**.

## SmartMailer: New Event Email Templates

Title

Select a template to use as the starting point for your mailshot \*

Blank

Demo Event Invitation

Event Template - Stakeholder Summit

Test - Event Invite Template

Event regular

Event test

SAVE TEMPLATE

SAVE & EDIT TEMPLATE

# Event Invitations

Once you have created and saved your Templates, you can use these to send to stakeholders.

This guide will inform you how to **create** and **add contacts** to an Event.

Once you have done this, you can **Communicate** with your stakeholders. In other words, you can send them an invitation to attend the upcoming event.

1. Go to your **Event** in the **View Event** screen
2. Select **Email Invitation** from the left-hand menu

## Events: View Event 1

### Add New:

- Add Invitees
- Add Event Activity
- Add Event

### Event:

- View Event
- Edit Event
- Clone Event
- Change Event Status
- Invitations Status List
- Link to Survey
- Link to Objective
- Archive Event

### Communicate:

- Email Invitation 2
- Email All Invitees

### Search:

- Events

Title

Event Invitation Event

Sub Projects

Status

Pending

Event Category

Meeting

Start Date

27/06/2024 09:00

End Date

27/06/2024 12:00

Event Type


Face-to-Face Event

Venue

Town

Postcode

Add Attachment



Drag a file here  
or click to select.

ADD EVENT TO CALENDAR

PREVIEW REGISTRATION PAGE

PREVIEW ACCEPT/DECLINE PAGE

# Invitation Recipients

Our SmartMailer will confirm which contacts can receive your invitations.

Those who can receive the invitation will appear in the first header section, **Recipients**

Anyone who cannot receive the invitation will appear in the second header section, **Non Recipients**

**Please note:**

Contacts will appear in **Non Recipients** if their **Subscription Preferences** are set to either **No Response** or **Unsubscribed** for **Events**. You can change this in their Contact record (**View Contact**) to **Subscribed** and they will then appear in the **Recipients** list.

If you’re happy with the contacts that will receive the invitation, please select **Next**

## SmartMailer: Event Email Recipients

### Recipients:

Name	Email	Send Email
		<input checked="" type="checkbox"/>
John Doe	john.doe@example.com	<input checked="" type="checkbox"/>
Jane Doe	jane.doe@example.com	<input checked="" type="checkbox"/>
John Doe III	john.doe.iii@example.com	<input checked="" type="checkbox"/>
John C. Doe	john.c.doe@example.com	<input checked="" type="checkbox"/>
Jonathan Doe	jon.doe@example.com	<input checked="" type="checkbox"/>
John James Doe	john.james.doe@example.com	<input checked="" type="checkbox"/>

### Non Recipients:

Name	Email	Contact Permitted
John Doe	john.doe@example.com	Post, Email, Telephone, SMS,
Jane Doe	jane.doe@example.com	
John Doe	john.doe@example.com	
John Doe III	john.doe.iii@example.com	
John C. Doe	john.c.doe@example.com	

# Event Email Content

Now that you've confirmed your recipients, you can create your content framework.

1. The **Subject** will be that which appears in the subject line of an email
2. **From email address** is pre-populated and static, an email of your choice – yours will look different here
3. **From name** can be free-typed, again this will appear in the email 'From' line
4. Include a **Reply to** email address so if people need to ask questions, they send these to the right place.
5. Select one of your pre-set up **templates**
6. You can add any **attachments** but remember, in the invitation, you can include links!

## SmartMailer: Event Email Content

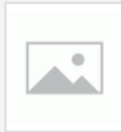
1	Subject *	<input type="text"/>
2	From email address *	testing@server.smartmailer.tractivity.co.uk
3	From name *	<input type="text" value="luke Gratton"/>
4	Reply to email address *	<input type="text" value="luke.gratton@tractivity.co.uk"/>


5

Template


Select the template you wish to use for your email:



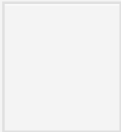
Blank



Demo Event Invitation



Event Template - Stakeholder Summit



Test - Tractivity Newsletter

## Attachments

6

### Please note

All attachments will be subjected to anti-virus checks. If an attachment fails these checks for any reason, it will not be included within the email

Add Attachment



Drag a file here  
or click to select.

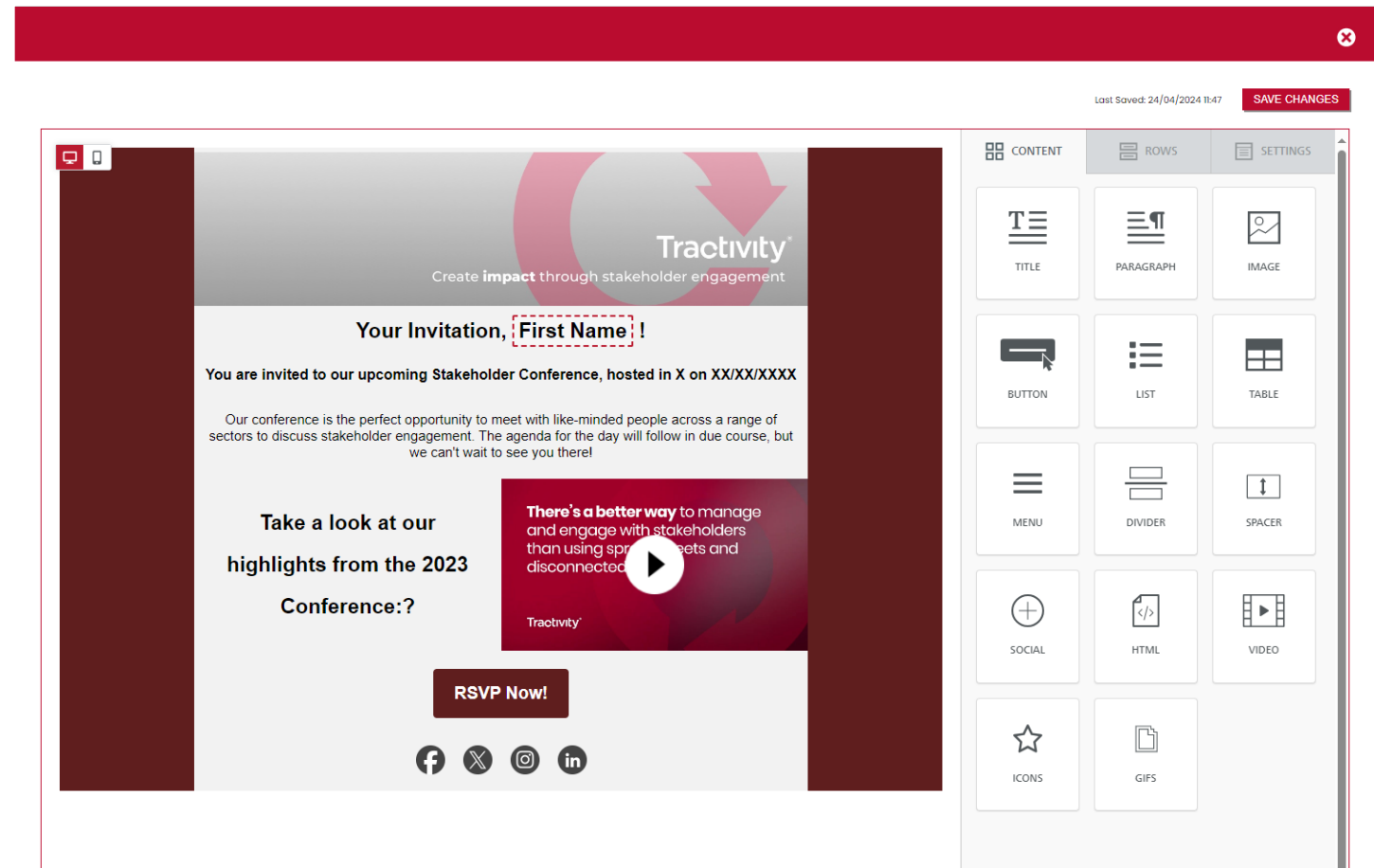
Attached File(s)

# Edit Content

Now you can move on to the edit of your template.

You can change text, links and several other elements within this template so it can be personalised to an upcoming event.

The following slides will give you all the insight you need on how to navigate our new builder.



# Rows: How to Use

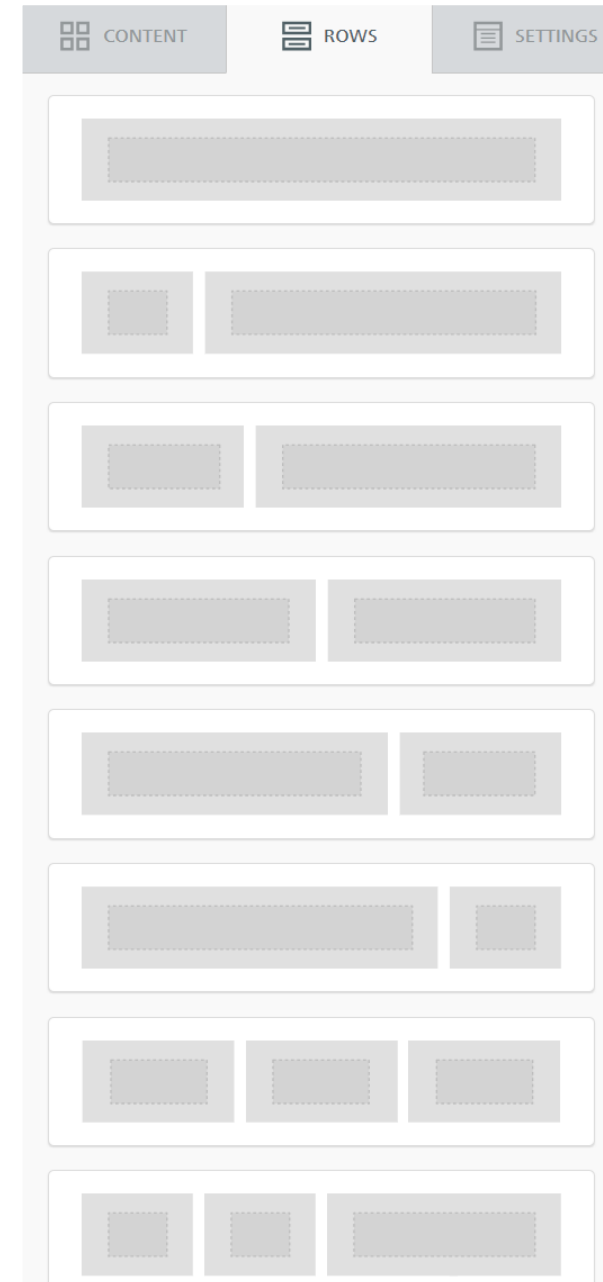
**You can use different scale rows in which to input your content. Rows are the framework of how you need your mailshot to look.**

For example, would you like an image alongside text? Or two columns side-by-side?

**No problem**, you have a wide selection of options to choose from.

You can drag-and-drop your preferred row layout and then add your content to it to start shaping your mailshot as you require.

Please see the next page on how to edit rows.



# Rows: How to Edit

Once you have added your preferred rows to the invitation, you can make several changes.

To do this, click on the row when the **solid red line** is showing to edit within **Row Properties**

The screenshot displays the Tractivity invitation editor interface. On the left, a dark red sidebar contains a 'Desktop' view selector and a plus icon. The main area is divided into a top header and a content section. The header features the Tractivity logo and the tagline 'Create impact through stakeholder engagement'. Below the header, the content section is titled 'Your Invitation, First Name!' and contains an invitation to a 'Stakeholder Conference'. A video player is embedded in the content, showing a play button and the text 'There's a better way to manage and engage with stakeholders than using spreadsheets and disconnected'. At the bottom of the content section is an 'RSVP Now!' button and social media icons for Facebook, Twitter, Instagram, and LinkedIn. On the right, a 'ROWS' tab is active, showing a 'ROW PROPERTIES' panel with options for 'BACKGROUNDS', 'BORDERS', 'LAYOUT', and 'COLUMNS STRUCTURE'.






# Rows: Backgrounds


**A Row Background allows you to add your branded guideline colours and even imagery from File Manager.**

**Please note:** we recommend you have access to your organisation's brand guidelines when building a mailshot in our new builder. You now have control over your colours throughout the entire mailshot.


ROW PROPERTIES




BACKGROUNDS




Row background colour

 transparent

Content area background colour

 #ffffff

Row background image




Choose image


Url


Apply image to

Content area

Row

 Fit to background

 Repeat

 Center

Background image support varies across email clients. Choose a fallback content area background color for optimal results.

# Rows: Borders

**Row Borders** gives you freedom to design around the article how you'd like.

**Content area boarder** gives you the ability to have different edge styling, such as **solid**, **dotted** or **dashed** borders around an article. You can choose the thickness and the colours in the second and third options.

**Content area rounded corners** allows for a softer edge around your article.

If you do wish to opt for consistency across your invitation, each row you set up will need to be amended individually.

BORDERS

Content area border

More options ☒

Top


solid

▼

-

0

+

 #000000

Right


solid

▼

-

0

+

 transparent

Bottom


solid

▼

-

0

+

 transparent

Left


solid

▼

-

0

+

 transparent

Content area rounded corners

More options ☒

Top-left

-

21

+

Top-right

-

21

+

Bottom-left

-

21


+

Bottom-right

-

21

+



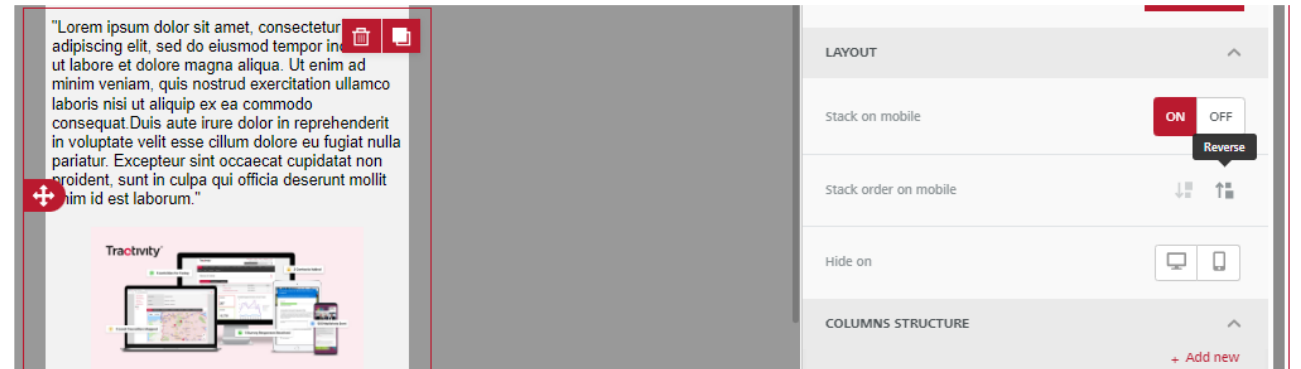
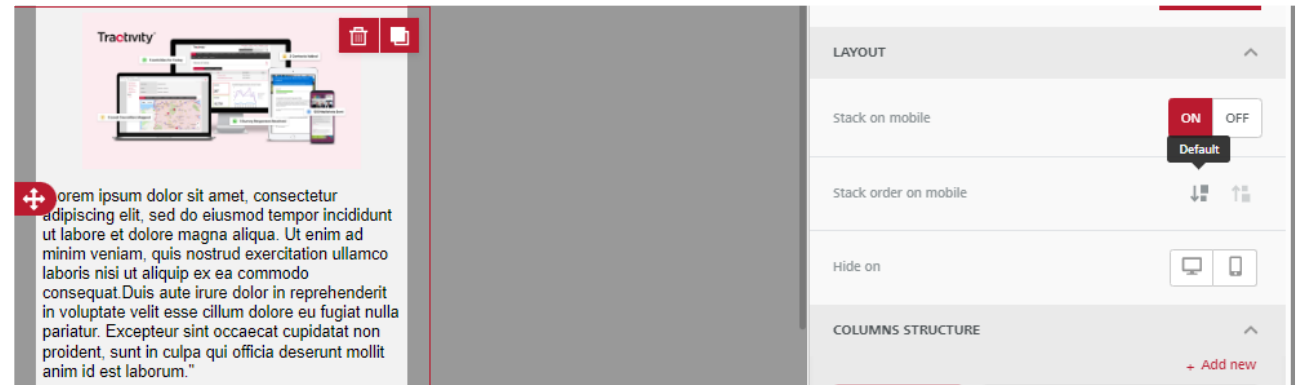
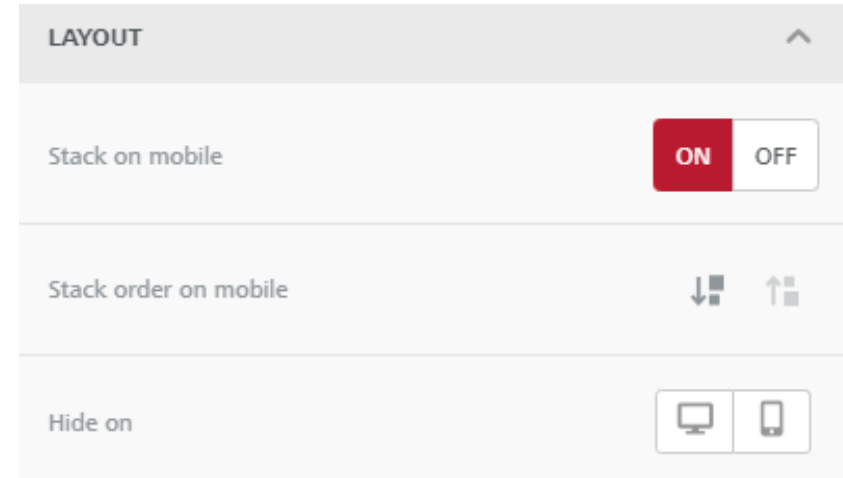
# Rows: Layout

As you can adapt your mailshot for desktop and mobile, you can differentiate how your rows look on either device.

**Stack on mobile** allows you to define the best way to display your content for stakeholders who use mobile devices.

If **ON** the stack order is the default, though you can change to reverse should you wish. The images overleaf shows that stacking provides additional flexibility as to where your images should be placed.

**Hide on** allows you to hide certain pieces of content on either a mobile and/or desktop.



## Rows: Column Structure

**You can change your column structure here.**

In this example the first option in **Rows** has been selected, which runs across the builder without a break.

**Should you wish to change this:**

Click **+** **Add new** to split off the structure, and if you've gone too far, simply click **Delete**. This way you can experiment with the structure you'd like to use.


COLUMNS STRUCTURE

+ Add new

12

COLUMN 1

Column background

 transparent

Padding

More options ☒

Top

-

5

+

Right

-

0

+

Bottom

-

5


+

Left

-

0

+



Border

More options ☐

All sides


solid

▼

-

0

+

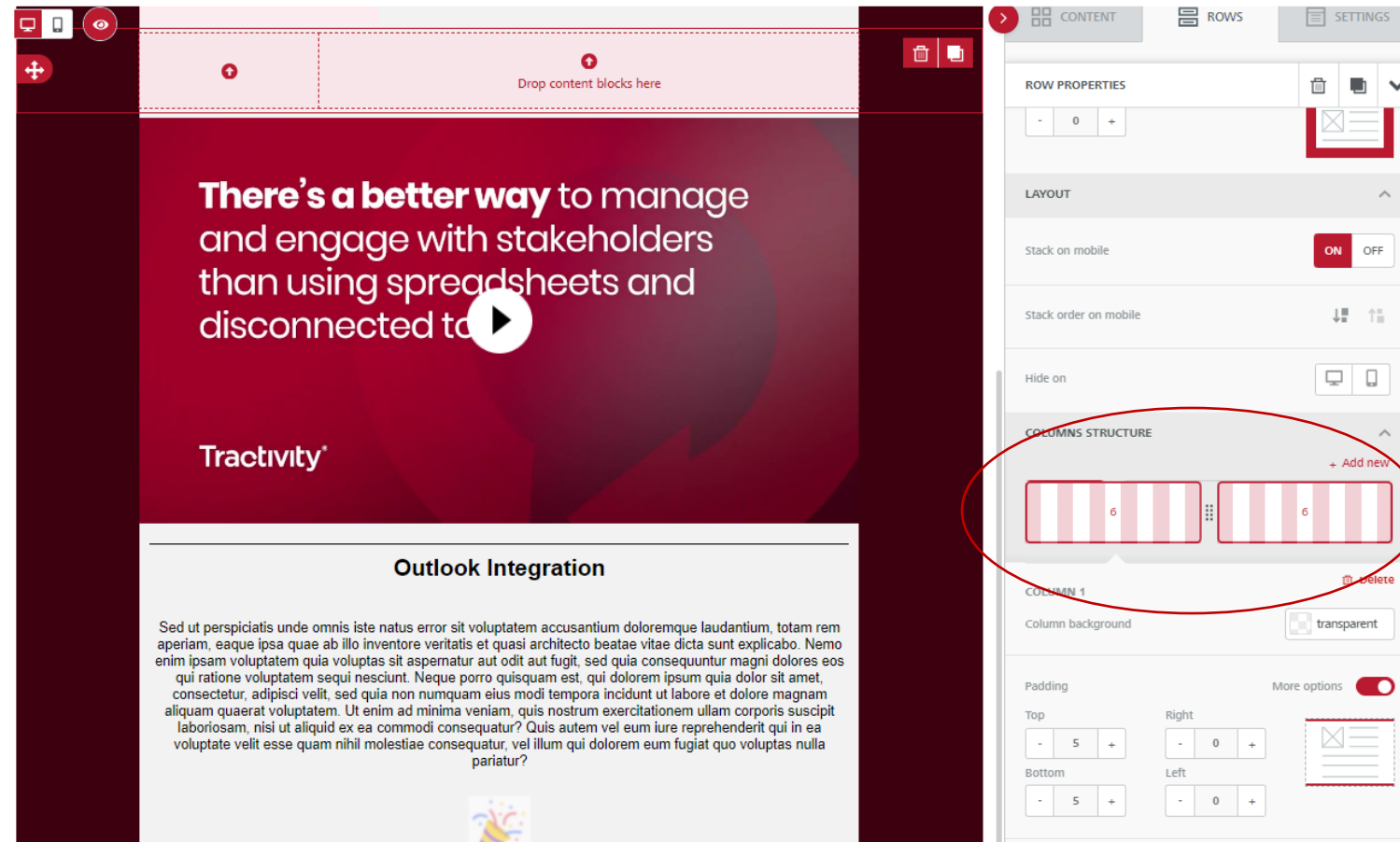
 transparent

# Rows: Column Structure Flexibility

**You can select pre-structured rows for your articles, but also have the freedom and flexibility to create bespoke structures.**

You can drag the icon between the columns left to right, or vice versa, to create a structure better suited to your needs.

**Once you release the icon the row structure will automatically change to the chosen set up within the content area.**



# Settings: Overview


**Settings** allows you to configure the framework of your mailshot template.


**Content area width** allows you to choose how the content will appear to the stakeholder. For example, you could have this less wide with blank space either side to include your branded colours in **background colour**


**Content area alignment** is related to positioning.

**Default font** means you can set the font here automatically without needing to change this in every paragraph/title content block you create later.

**Link colour** allows you to add branded colours to any links you include in your content.

 CONTENT

 ROWS

 SETTINGS

GENERAL OPTIONS

Content area width

675px

-


+

Content area alignment


Left

Center

Background colour

 #d50032

Content area background colour


 #ffffff

Default font

Arial

▼

Link colour

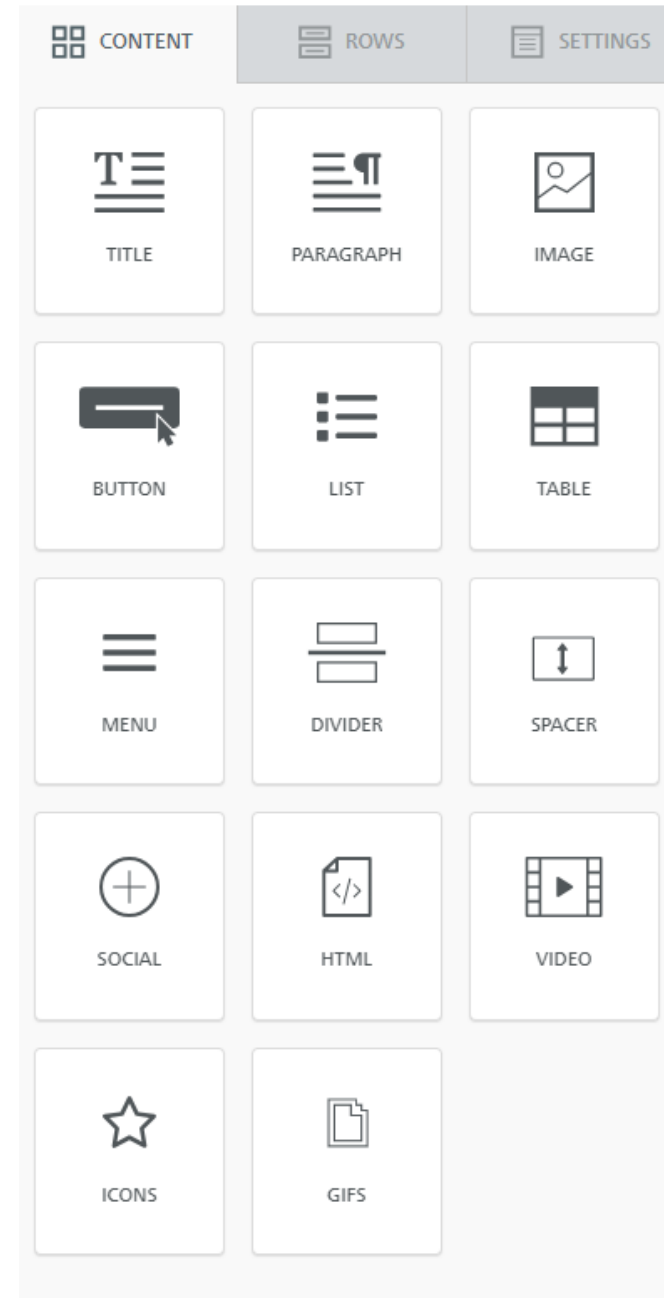
 #ff819c

# Content: Overview

Our Content library gives you the freedom to build bespoke invitations.

You can drag-and-drop any of the options into rows to design your stakeholder content.

The following pages will provide insight into all the **Content** options, so you have a firm understanding of how to seamlessly create newsletters for your stakeholders.

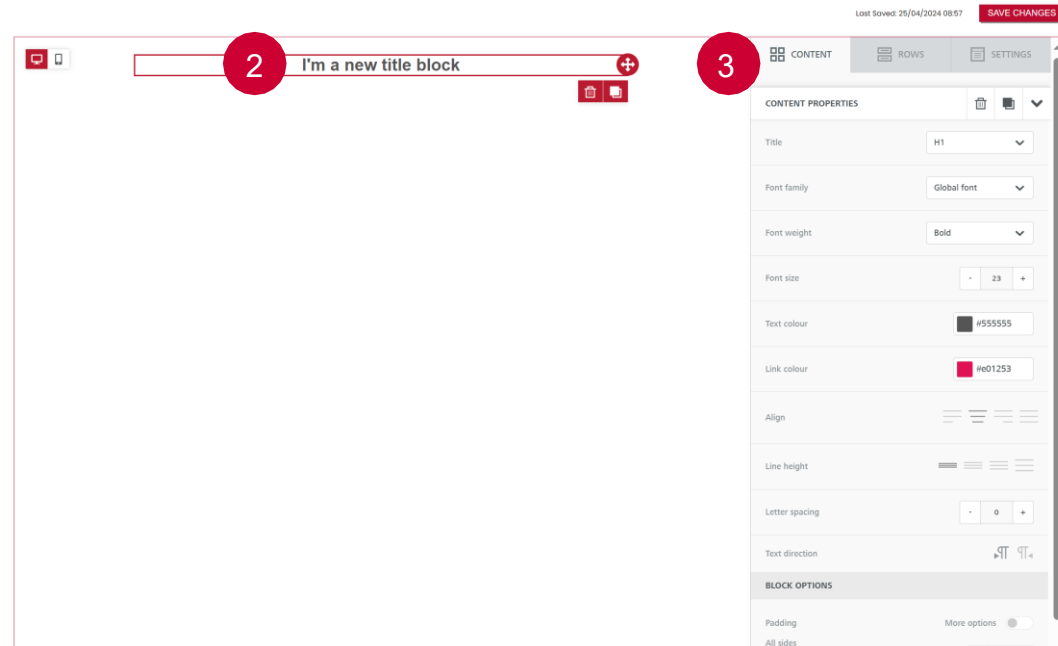
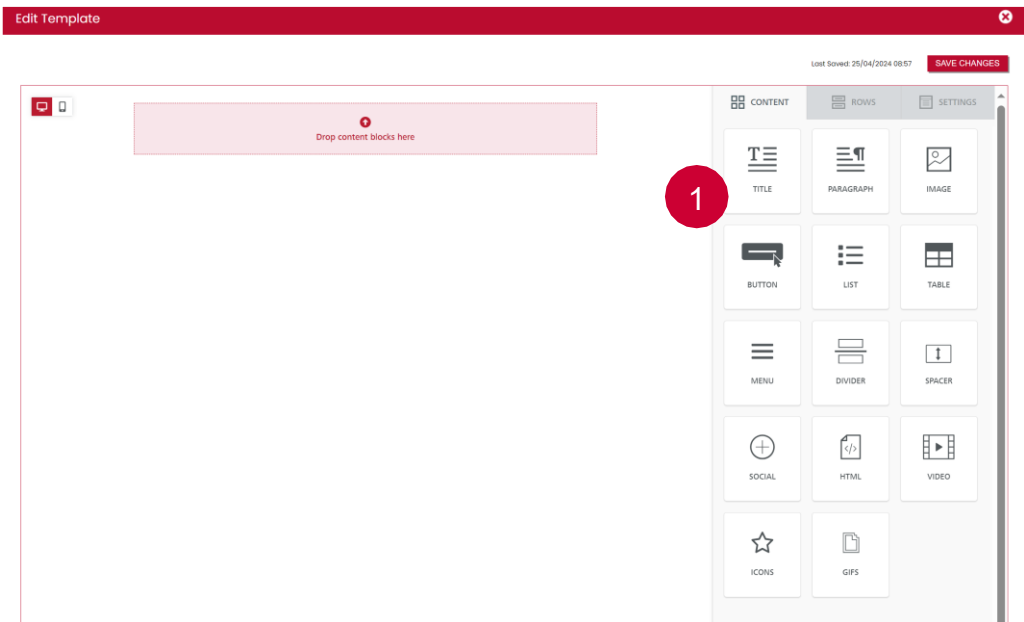


# Content: Title

**Title** allows you to create a text heading.

1. You can drag **Title** into your chosen row
2. This will then appear as **I'm a new title block**
3. The text will appear basic, but you can customise this to your needs through **Content Properties**. You can:

- Change the **Font** style, weight and size
- Use your own specific branding for **colours**
- **Align** to the required style
- Set a **line height**, **letter spacing** and **text direction**
- You can set **padding** to make titles take more centre stage in your mailshots

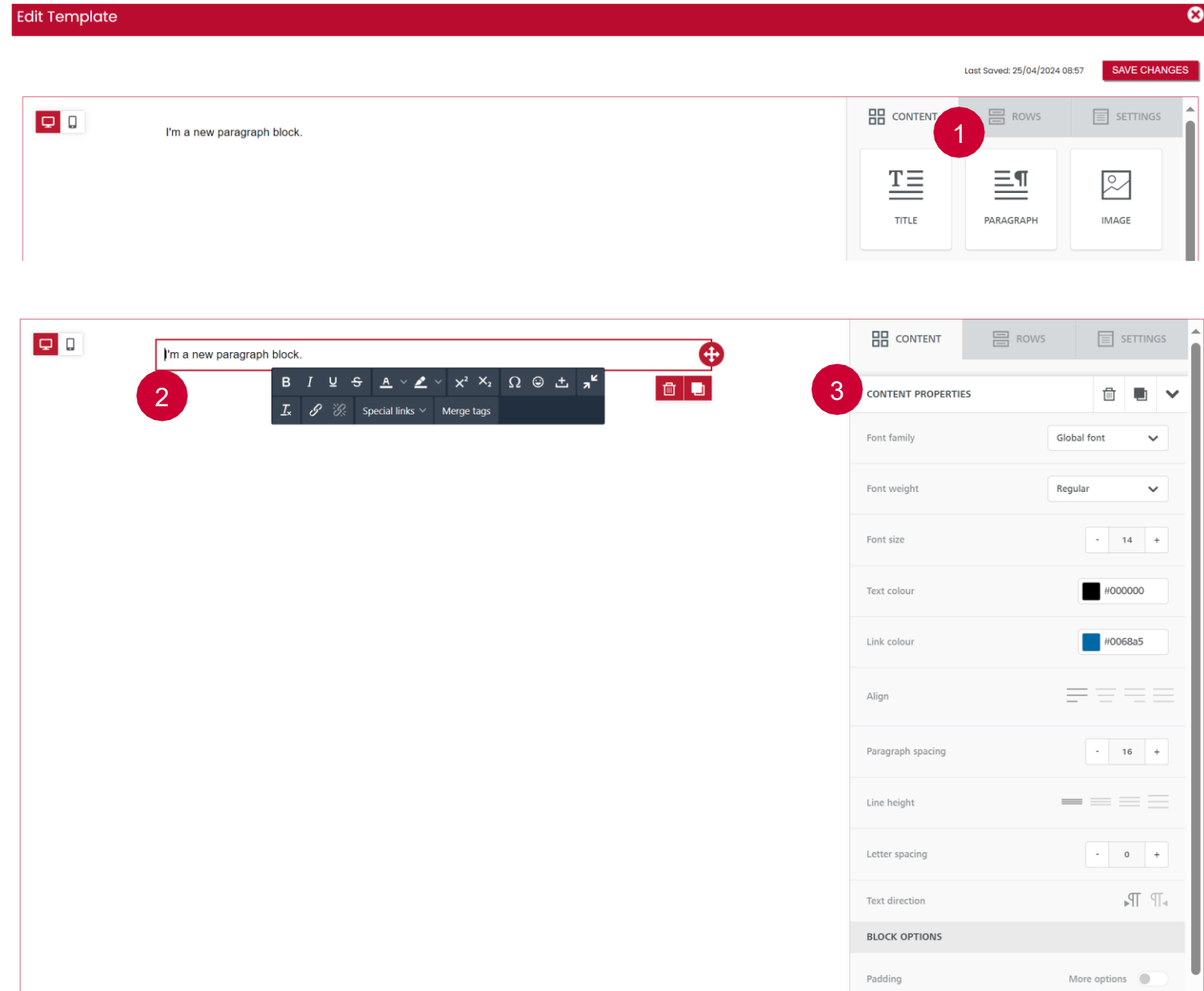




# Content: Paragraph

**Paragraph** allows you to write out your article content.

1. You can drag **Paragraph** into your chosen row.
2. This will then appear as **I'm a new paragraph block**
3. The text will appear basic, but you can customise this to your needs through **Content Properties**. You can:
  - Change the **Font** style, weight and size
  - Use your own specific branding for **colours**
  - **Align** to the required style
  - Set a **line height**, **letter spacing** and **text direction**
  - You can set **padding** to make paragraphs take more centre stage in your invitations.



# Content: Image

**Image** allows you to add banners and other visual aids.

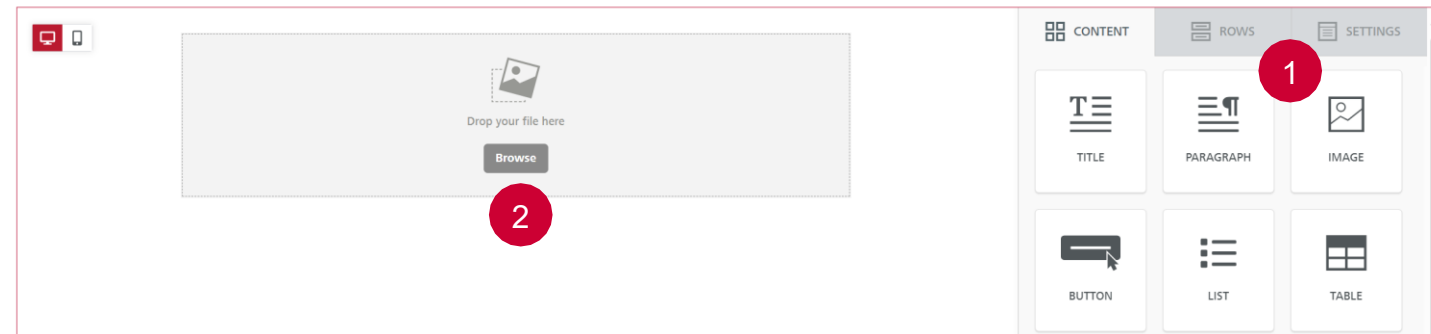
1. You can drag **Image** into your chosen row
2. Select **Browse** to ensure you can upload images of your choice

You will be taken to our File Manager where you can add all images you will use in your invitations.

**Please note:**

The image will wrap around the size of the row you have chosen.

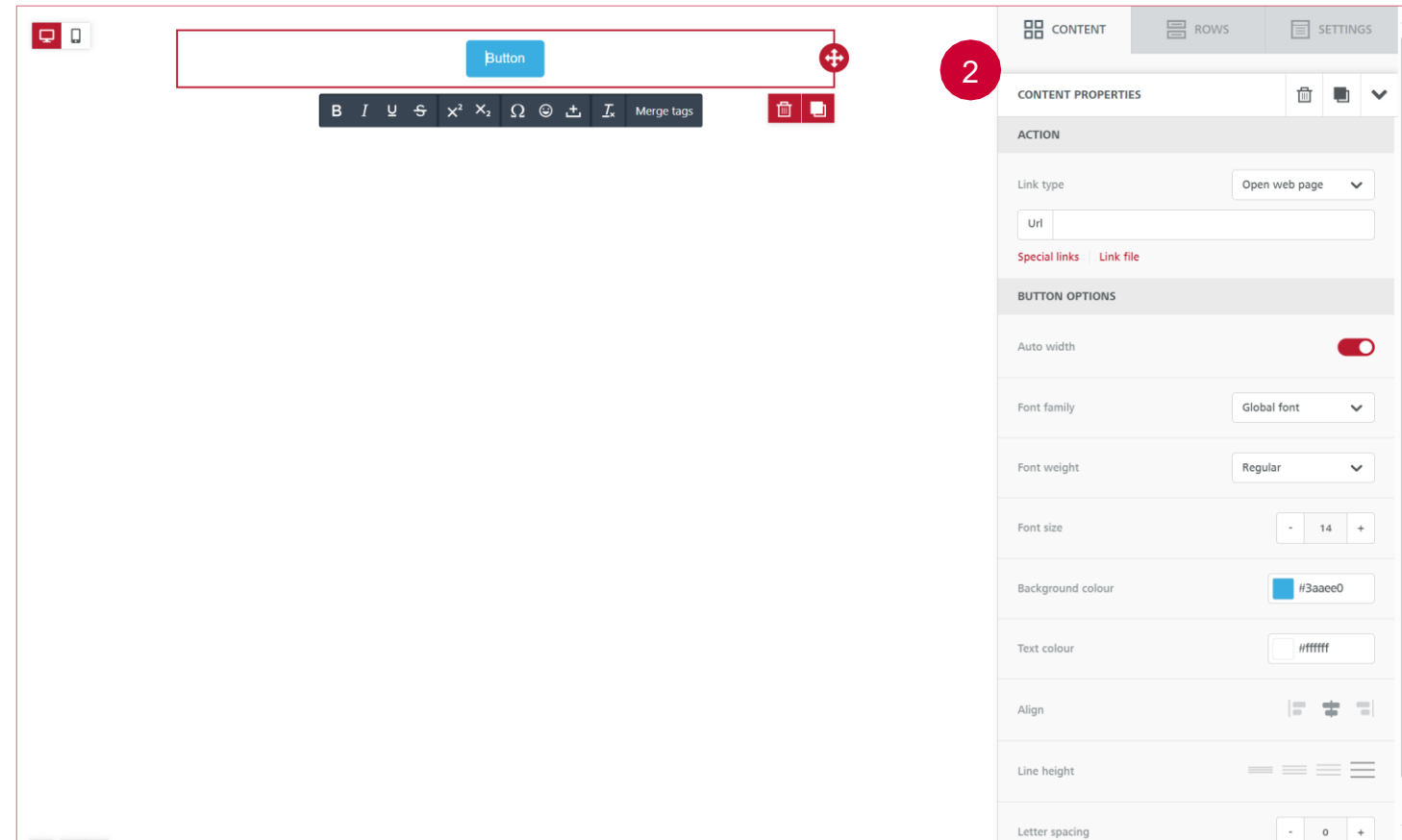
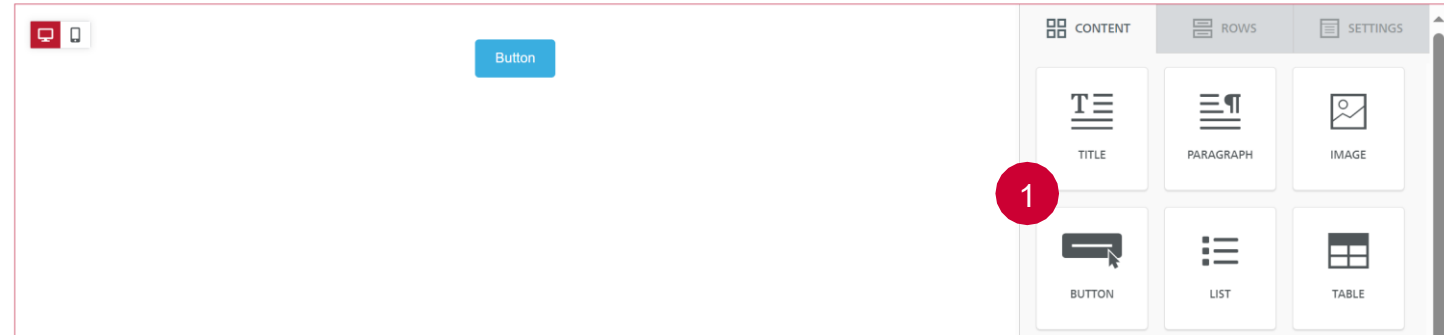
You can re-size images via **Content Properties** in **Settings**



# Content: Button

**Button** can be a call to action within your invitations.

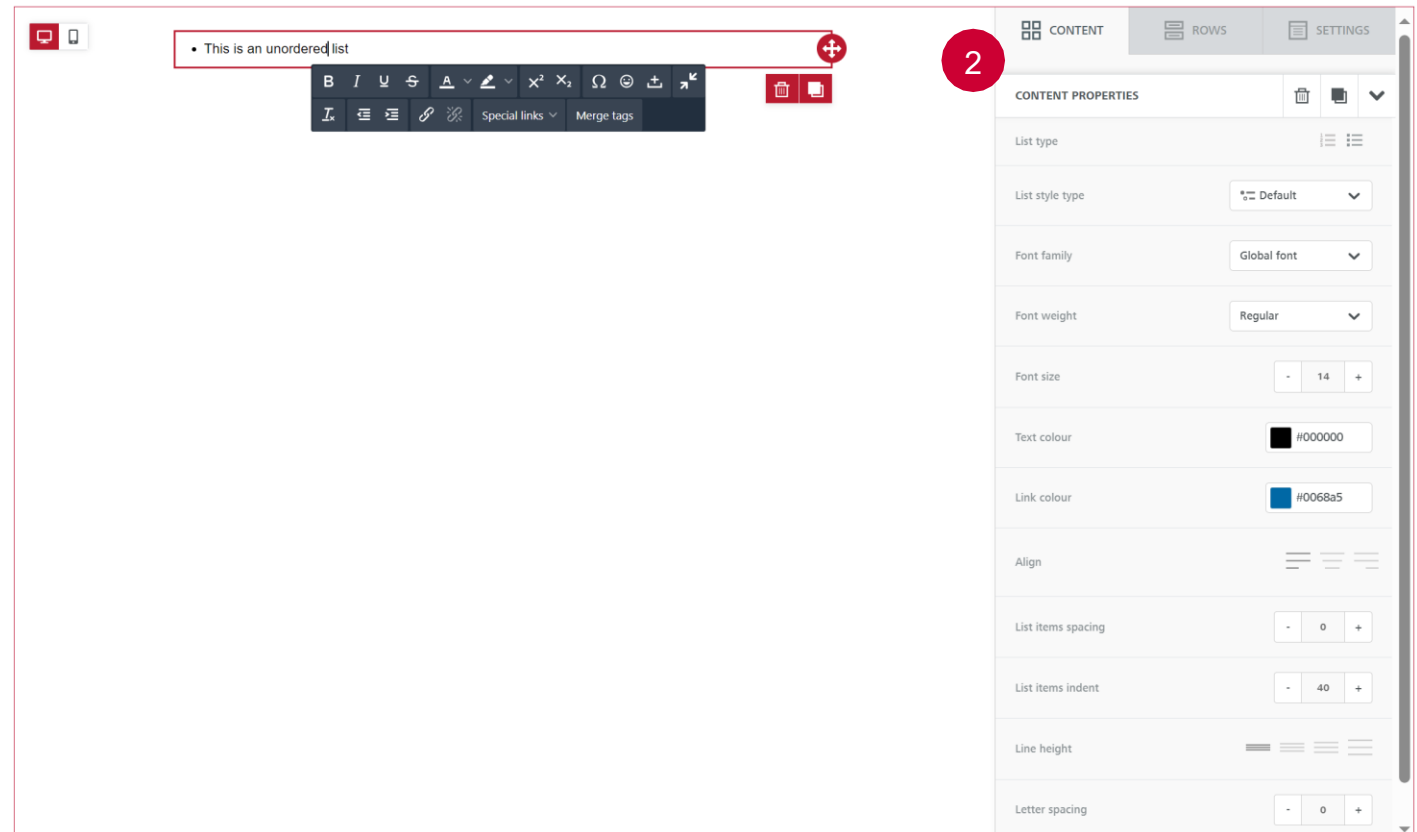
1. You can drag **Button** into your chosen row and apply your own text.
2. Within **Content Properties** you can apply the relevant URL and amend button branding colours, text fonts and sizes



# Content: List

**List** allows you to itemise your content.

1. You can drag **List** into your chosen row and apply your own text. You'll notice the text is bullet-pointed. Clicking **enter** allows you to add additional bullets.
2. Within **Content Properties** you can apply the relevant font changes, list item spacing, indent alignment and list types (bullets or numbers)



# Content: Table

**Table** allows you to create bespoke tables.

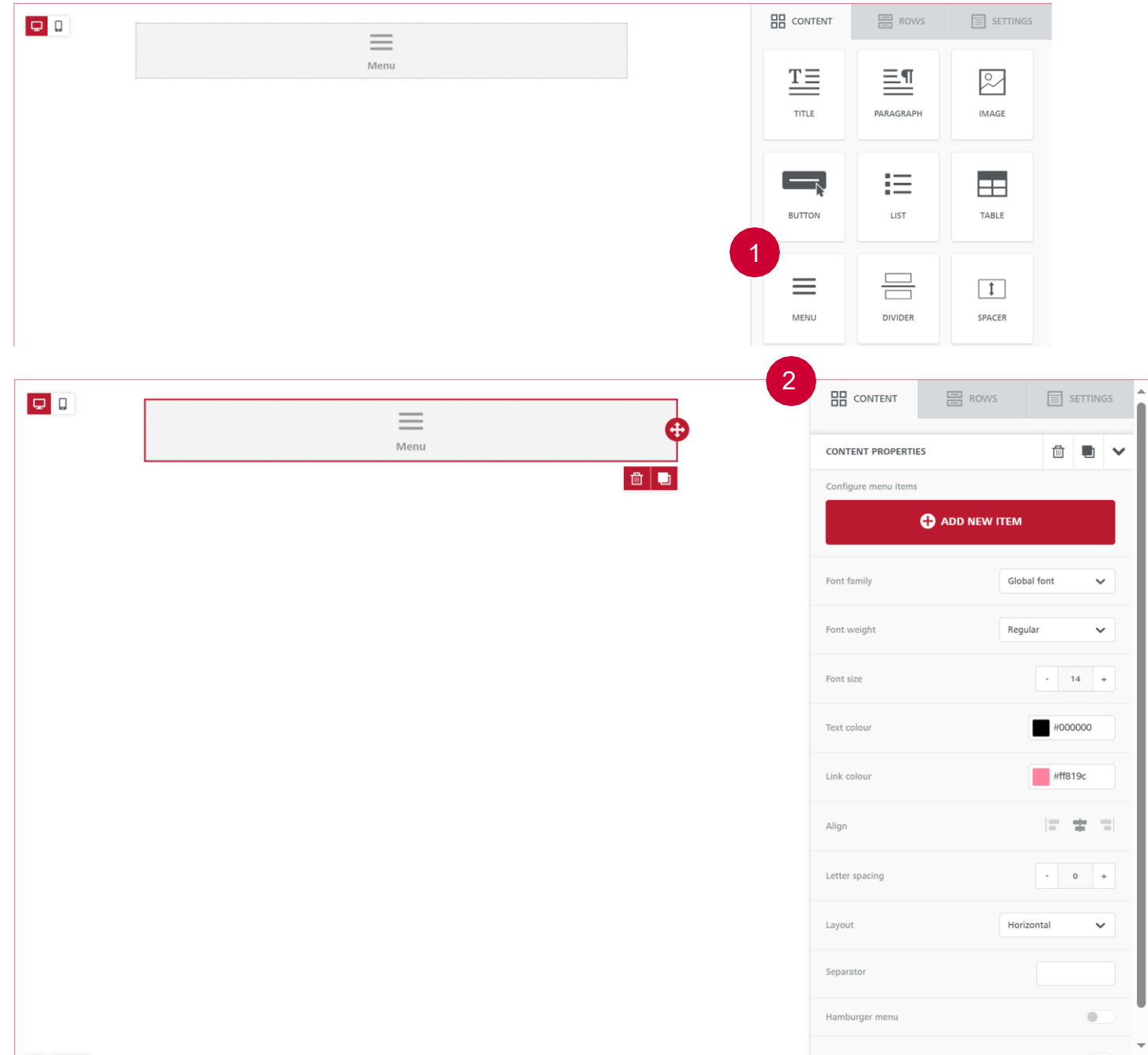
1. You can drag **Table** into your chosen row
2. Within **Content Properties** you can apply several changes, including:
  - The number of columns & rows you require
  - Boarder branded colours
  - Header content changes
  - Content font changes

The screenshot displays a content editor interface. On the left, a table is shown with a header row containing 'Add header text' and two data rows, each containing 'Add text'. On the right, a sidebar contains a 'CONTENT' panel with icons for TITLE, PARAGRAPH, IMAGE, BUTTON, LIST, and TABLE. A red circle with the number '1' highlights the TABLE icon. Below this, the 'CONTENT PROPERTIES' panel is shown, with a red circle and the number '2' highlighting the 'CONTENT' section. The 'CONTENT PROPERTIES' panel includes sections for LAYOUT, HEADER, and CONTENT. The HEADER section has a 'Header row' toggle (checked) and a 'Background colour' selector set to #eaeaea. The CONTENT section has a 'Font family' selector set to 'Global font', a 'Font weight' selector set to 'Regular', a 'Font size' selector set to '14', and a 'Text colour' selector set to #000000.

# Content: Menu

**Menu** allows you to include a variety of links, including ways for your stakeholders to contact you or view additional project work elsewhere.

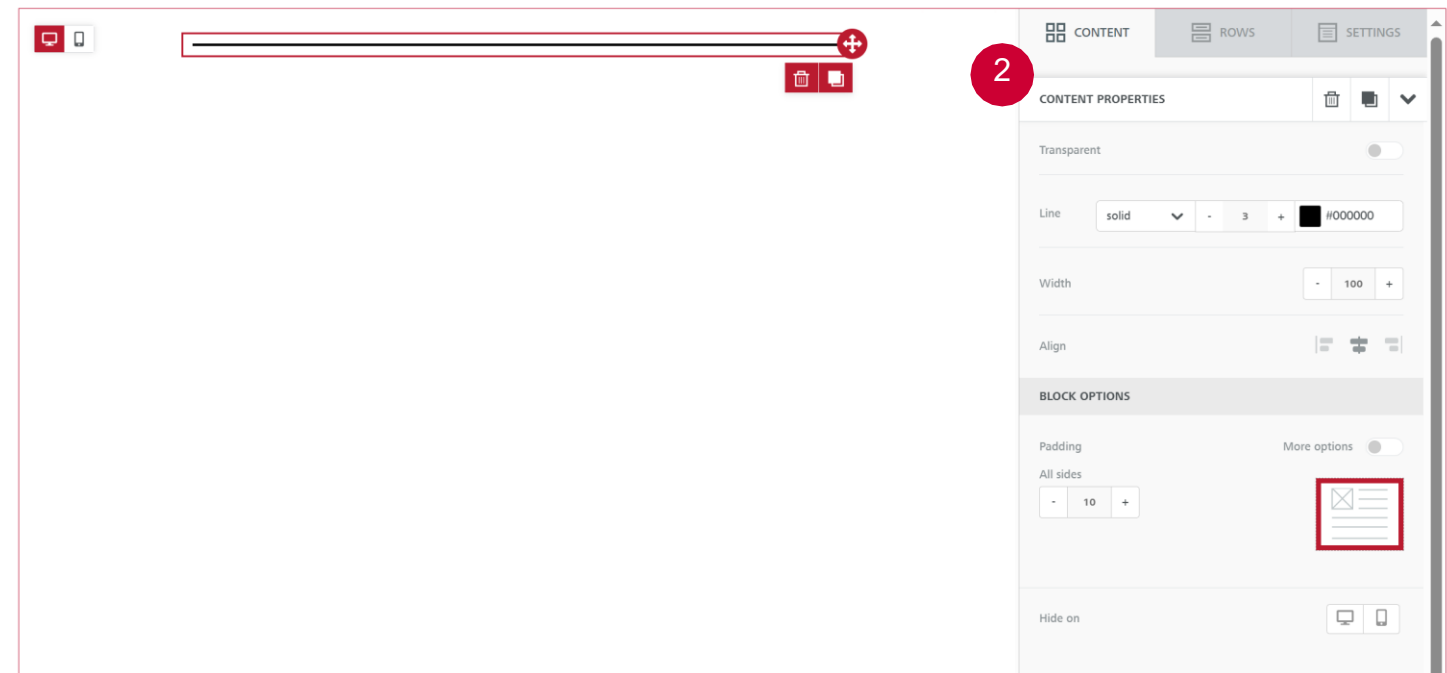
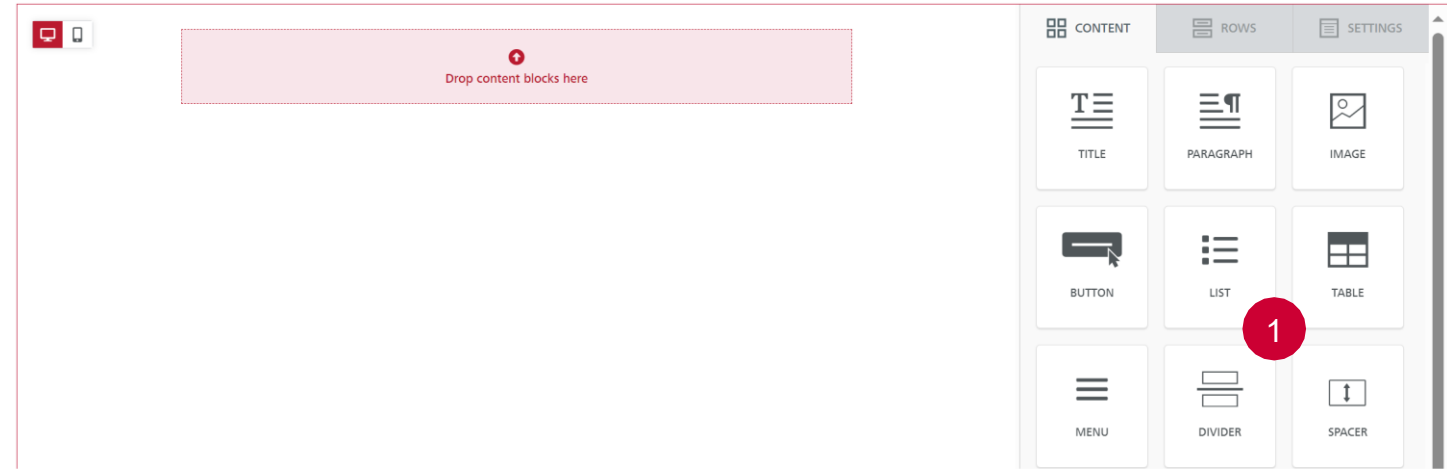
1. You can drag **Menu** into your chosen row.
2. Within **Content Properties** you can apply items of your choosing, such as:
  - Contact information
  - Email information
  - Your website



# Content: Divider

**Divider** allows you to apply a visible break between each article.

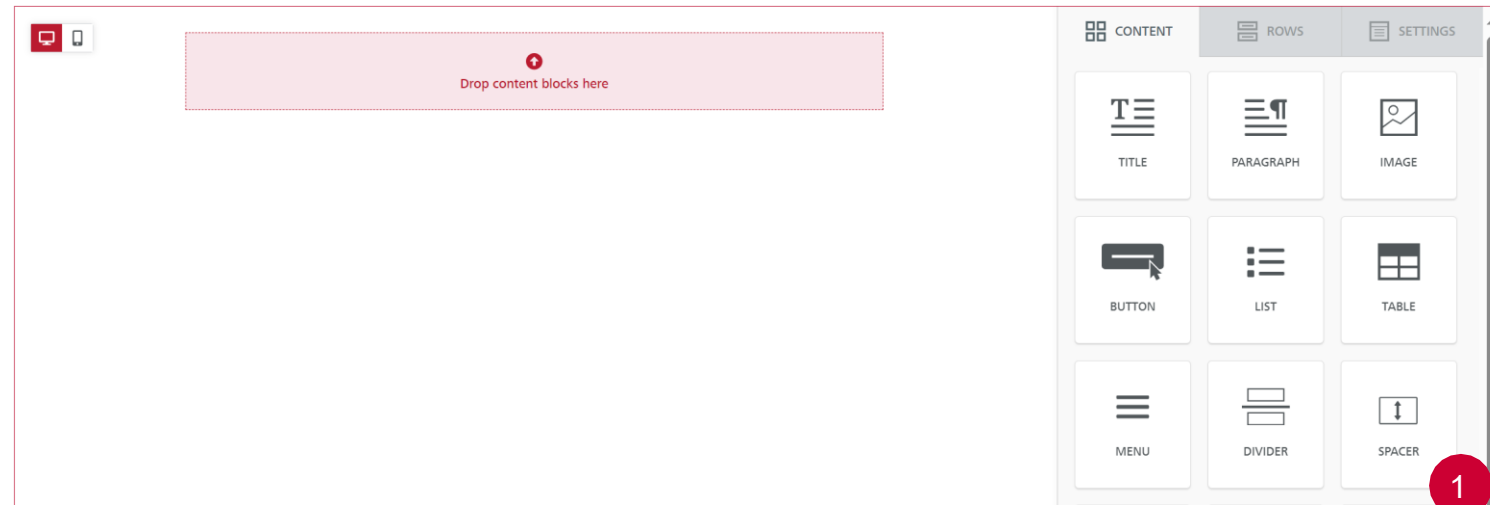
1. You can drag **Divider** into your content to create a **line** between each article.
2. Using **Content Properties**, you can:
  - Change the line from solid to dotted, for example
  - Change the thickness of the divider
  - Change the colour of the divider
  - You can also change the width and padding of the divider



# Content: Spacer

**Spacer** allows you to include a gap between your articles. **Spacer** is slightly different to **Divider** in that the gap presented is not strictly visible.

1. You can drag **Spacer** into your chosen row. This will create a break between the article above and below the spacer.
2. Within **Content Properties** you can apply the height of the space. The standard will be 60, however you can make this smaller and larger.
3. The ability to **hide** on desktop and/or mobile is available – you may feel spacers on mobile views are less necessary.



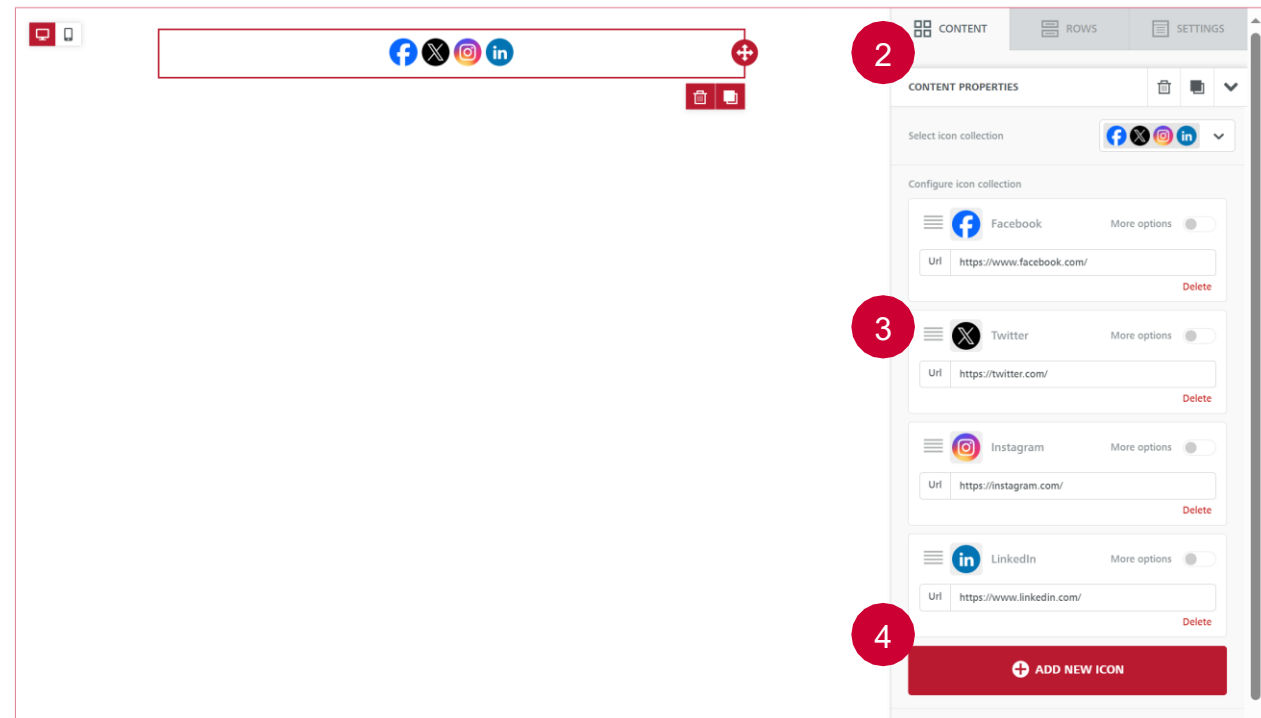
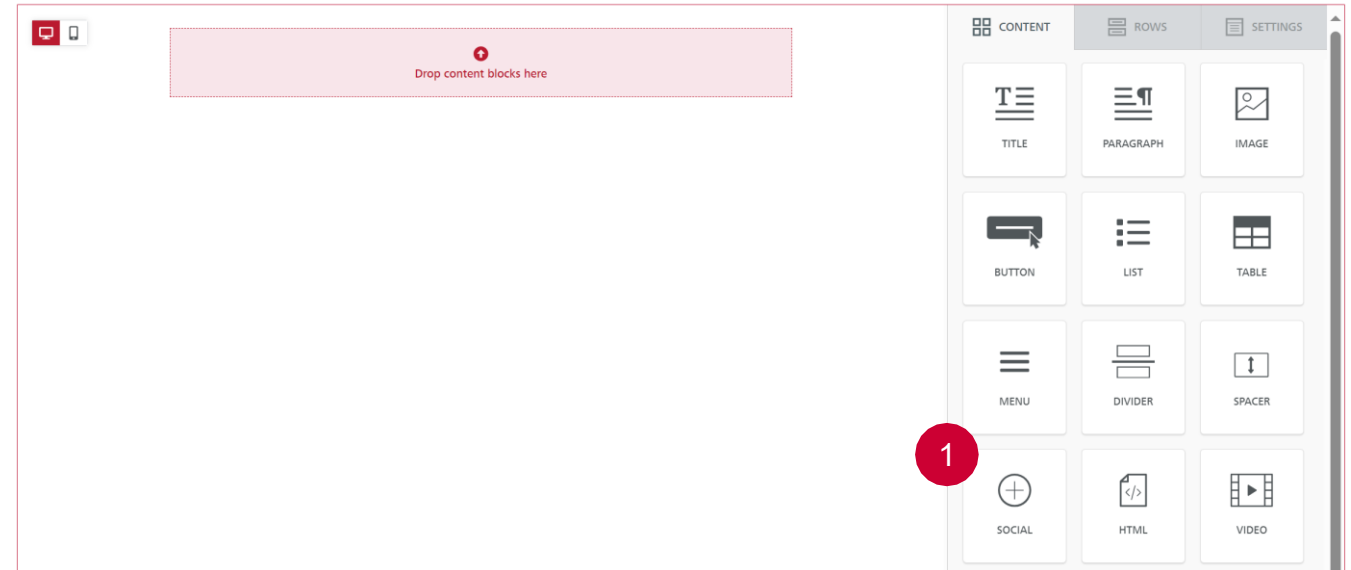


# Content: Social

**Social** allows you to input your all-important social media links.

Social links was something provided automatically in the previous Tractivity mailshot builder. This is now something you can change in all your content moving forwards.

1. You can drag **Social** into your chosen row
2. Within **Content Properties** you can change the style of icons provided.
3. You can apply the relevant URLs which stakeholders can visit once the mailshot has been sent
4. And add additional icons, such as WhatsApp and Email



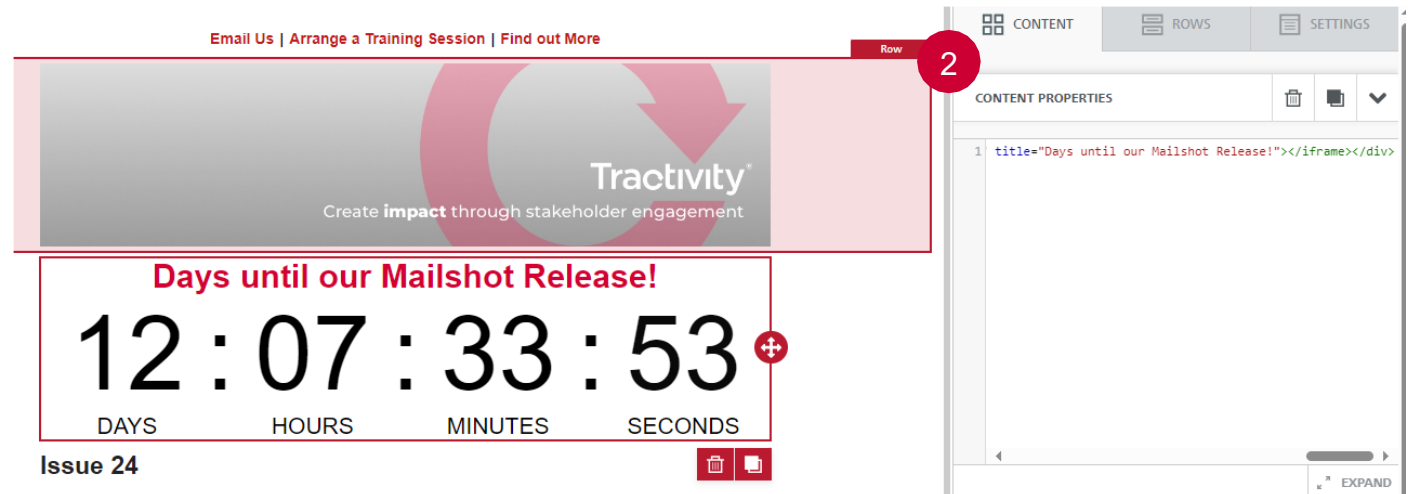
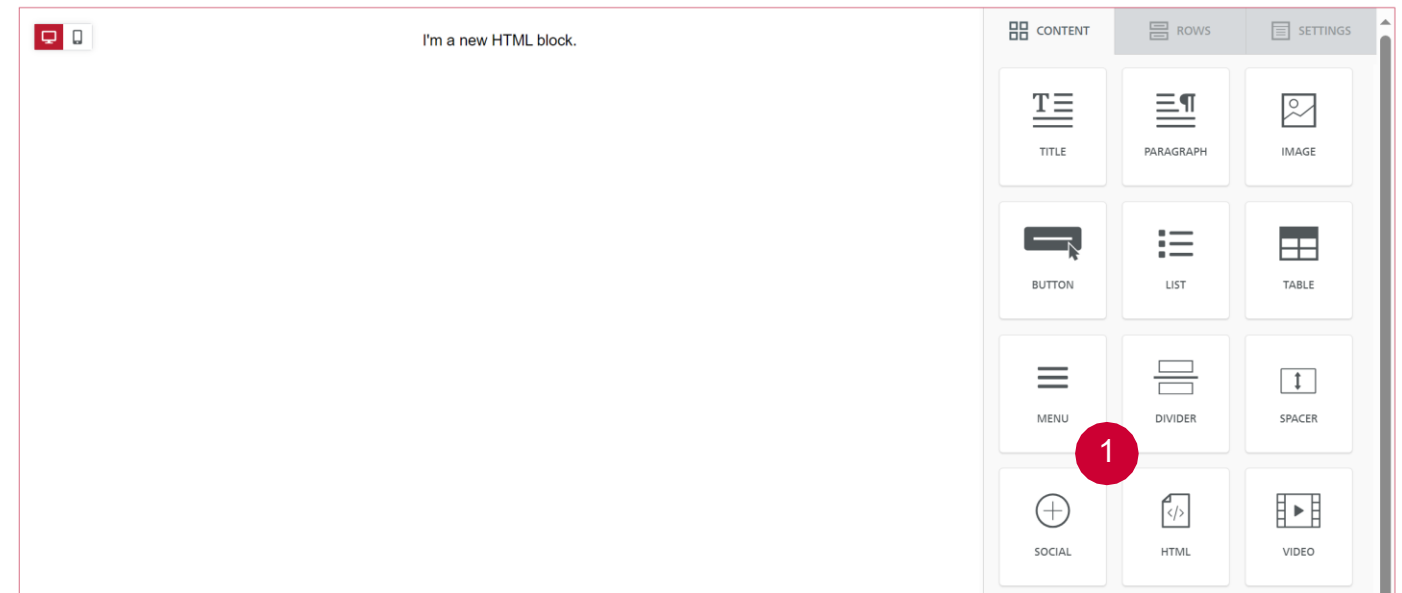
# Content: HTML - Countdowns

**HTML** allows you to enter specific code. For example, if you have an upcoming event you wish to advertise, you can include a dynamic countdown.

## Please note:

You can create a countdown timer, there are many services that you can use for this purpose. [Niftyimages](#) again, but also [Fresh Relevance](#), [CountdownMail](#)

1. Drag a **HTML** blog into your content
2. Once you have created your countdown at the above or another countdown provider, you can **copy and paste** the HTML coded provided into the text box. This will then ensure the countdown is part of your content



# Content: HTML – Anchor (1/3)

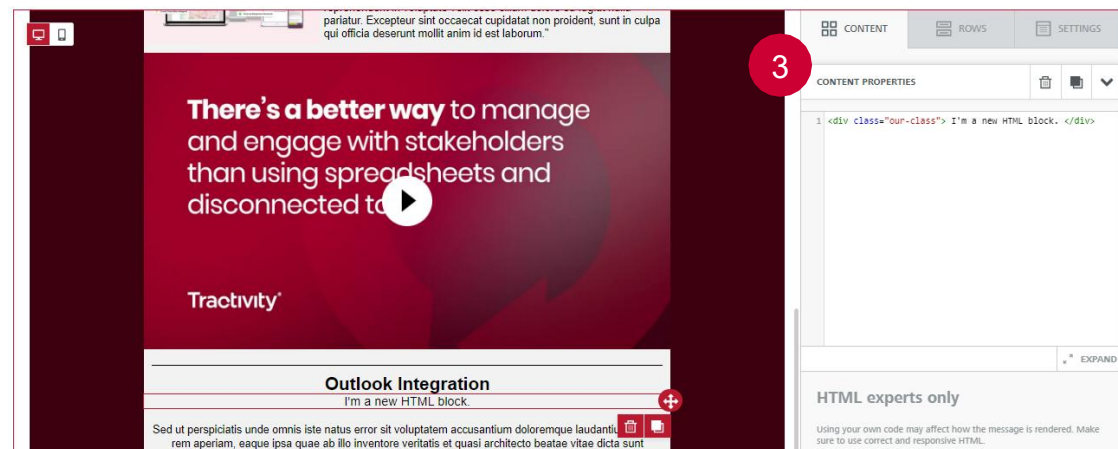
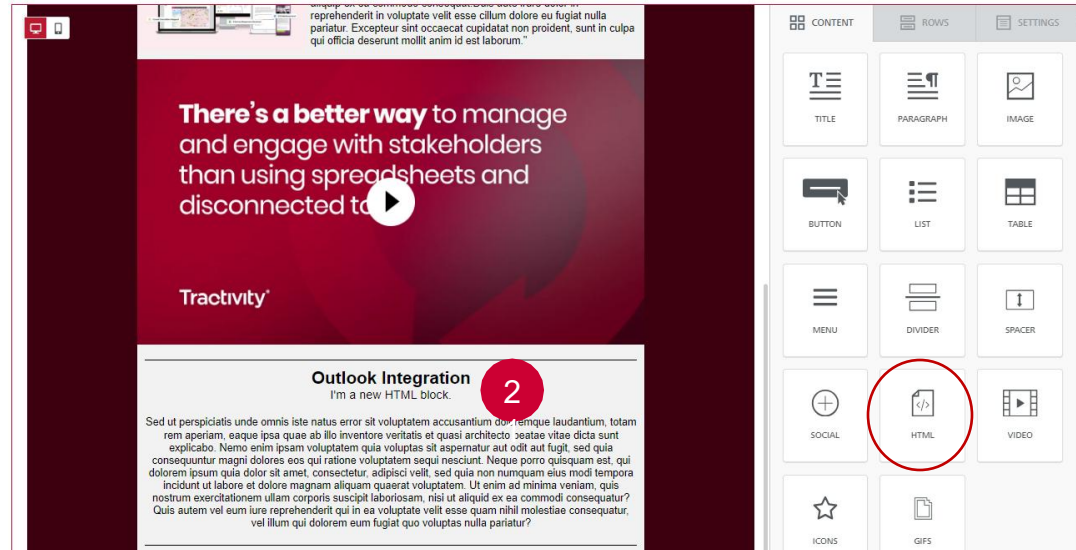
**HTML** allows you to enter specific code.

You can also use **HTML** as an **anchor**. This is very useful when it comes to sending content-heavy invitations.

1. Select a **content block** that will act as a link to content within in your mailshot
2. Select the area you wish the article to go to when the **above content block** is clicked. Drag a **HTML** content block here.
3. Open the **HTML Content Properties**

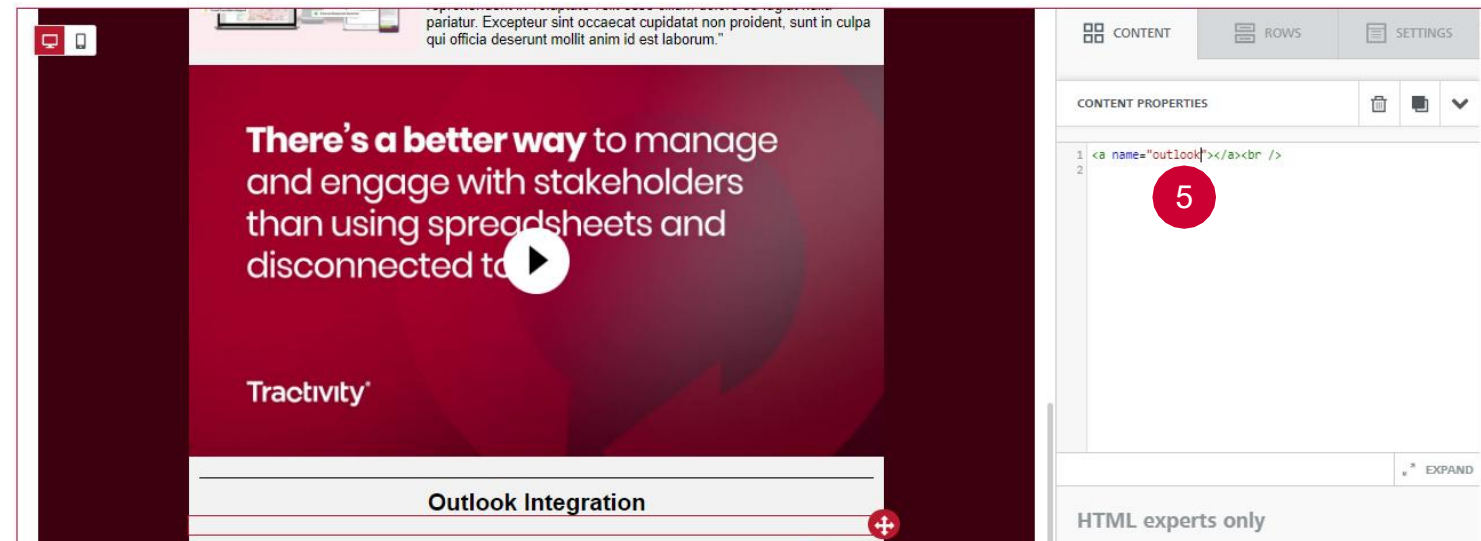
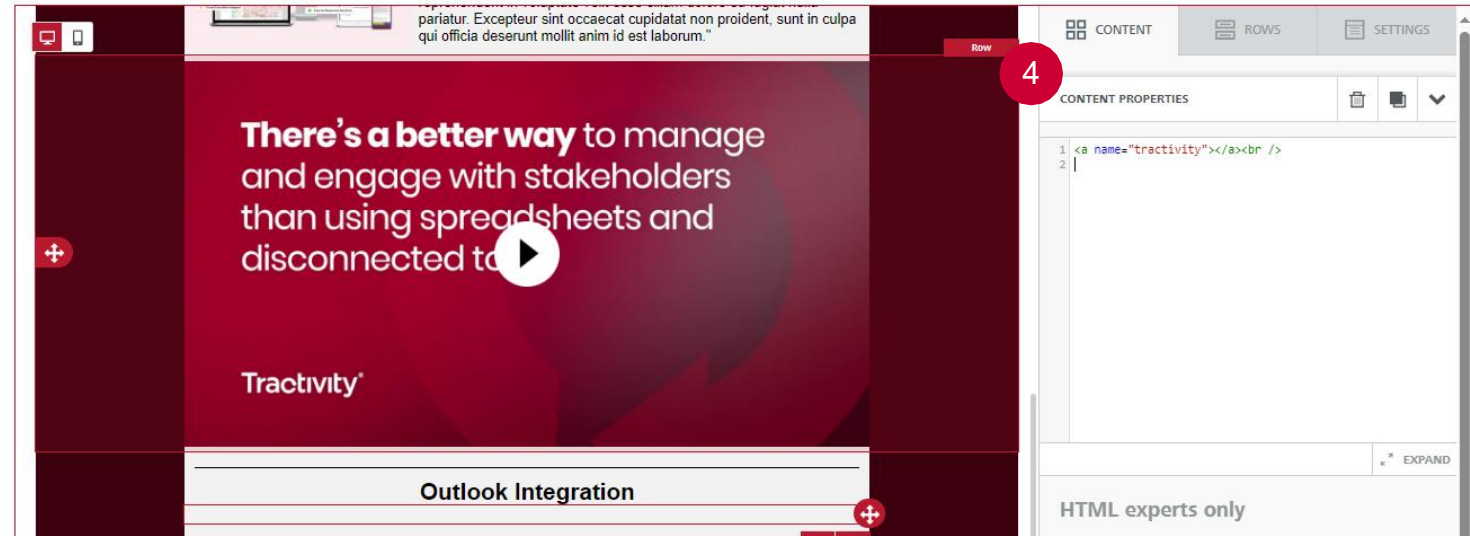
Copy the below code:

```
<a name="tractivity"></a><br />
```



## Content: HTML – Anchor (2/3)

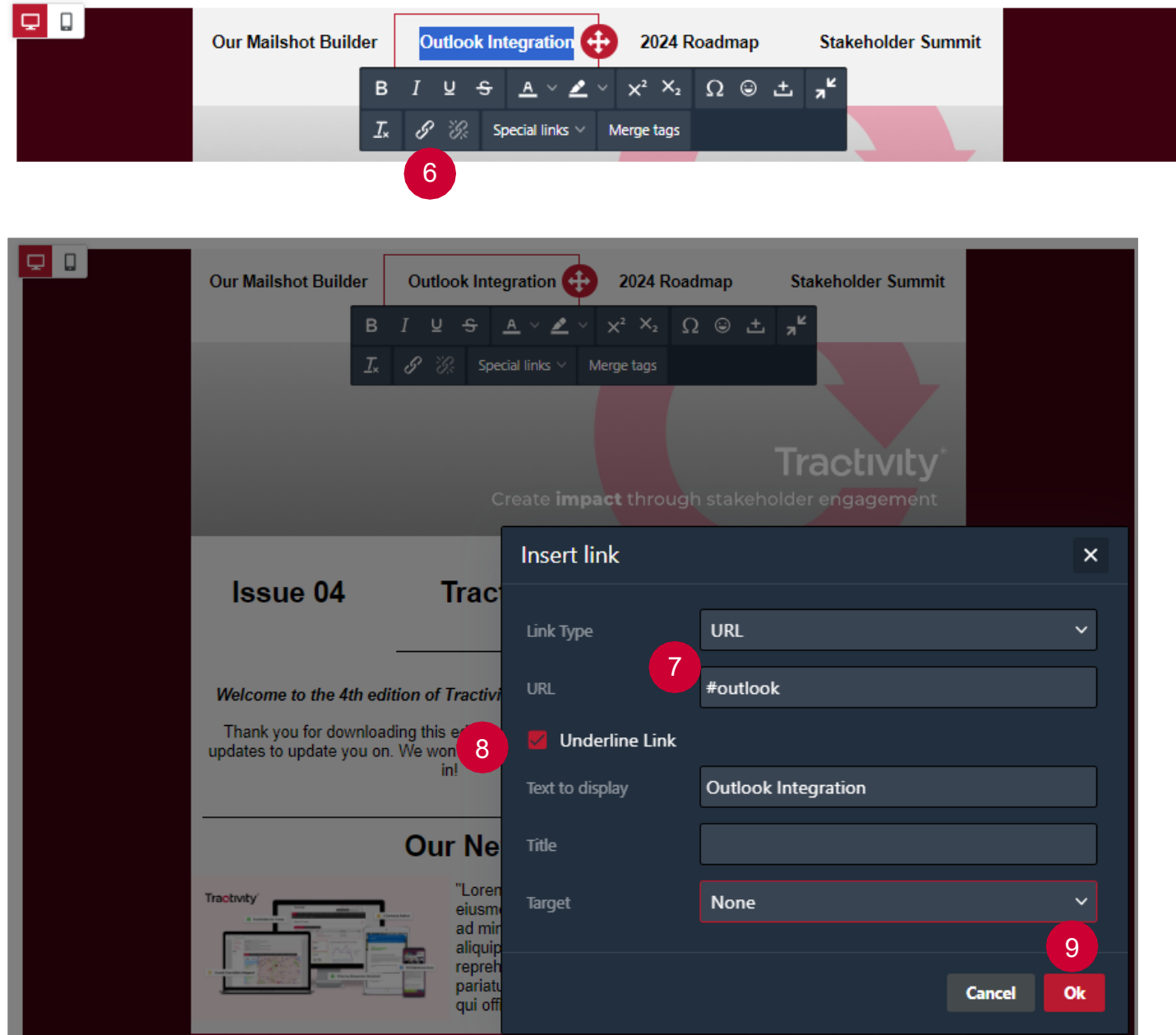
4. Enter the code overleaf into the **HTML code area**
5. Rename the **red** text “tractivity” to the name of the article header. For example: *outlook*



## Content: HTML – Anchor (3/3)

6. Highlight the content block from Step 1 and select **Inset Edit Link**
7. Insert the renamed code into the **URL** option. Please enter # before the rename
8. Untick **Underline Link** if you do not wish to have an underline
9. Set the **Target** to **None** and click **OK**

Once set up, any stakeholders that click the area of the link



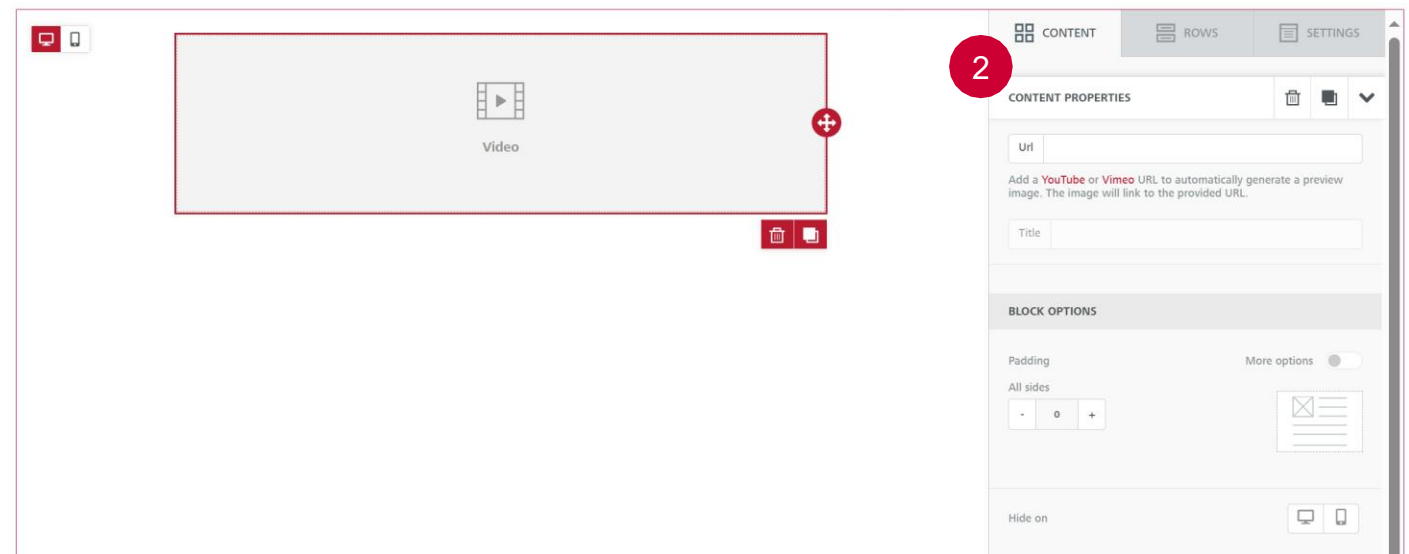
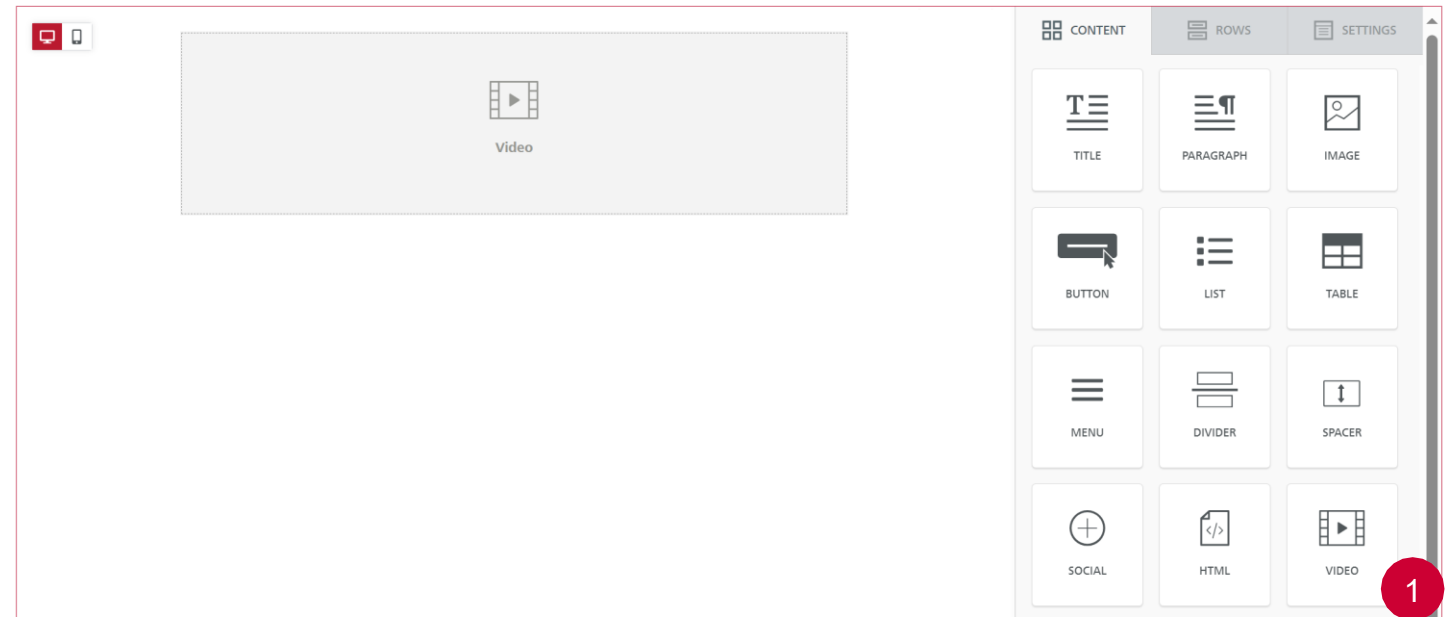
# Content: Video

**Video** allows you to include recorded media within your content.

**Please note:** only YouTube and Vimeo videos can be used here.

1. You can drag **Video** into your chosen row
2. Within **Content Properties** you can apply the relevant YouTube URL. This will automatically provide a preview image. The image will link to the URL.

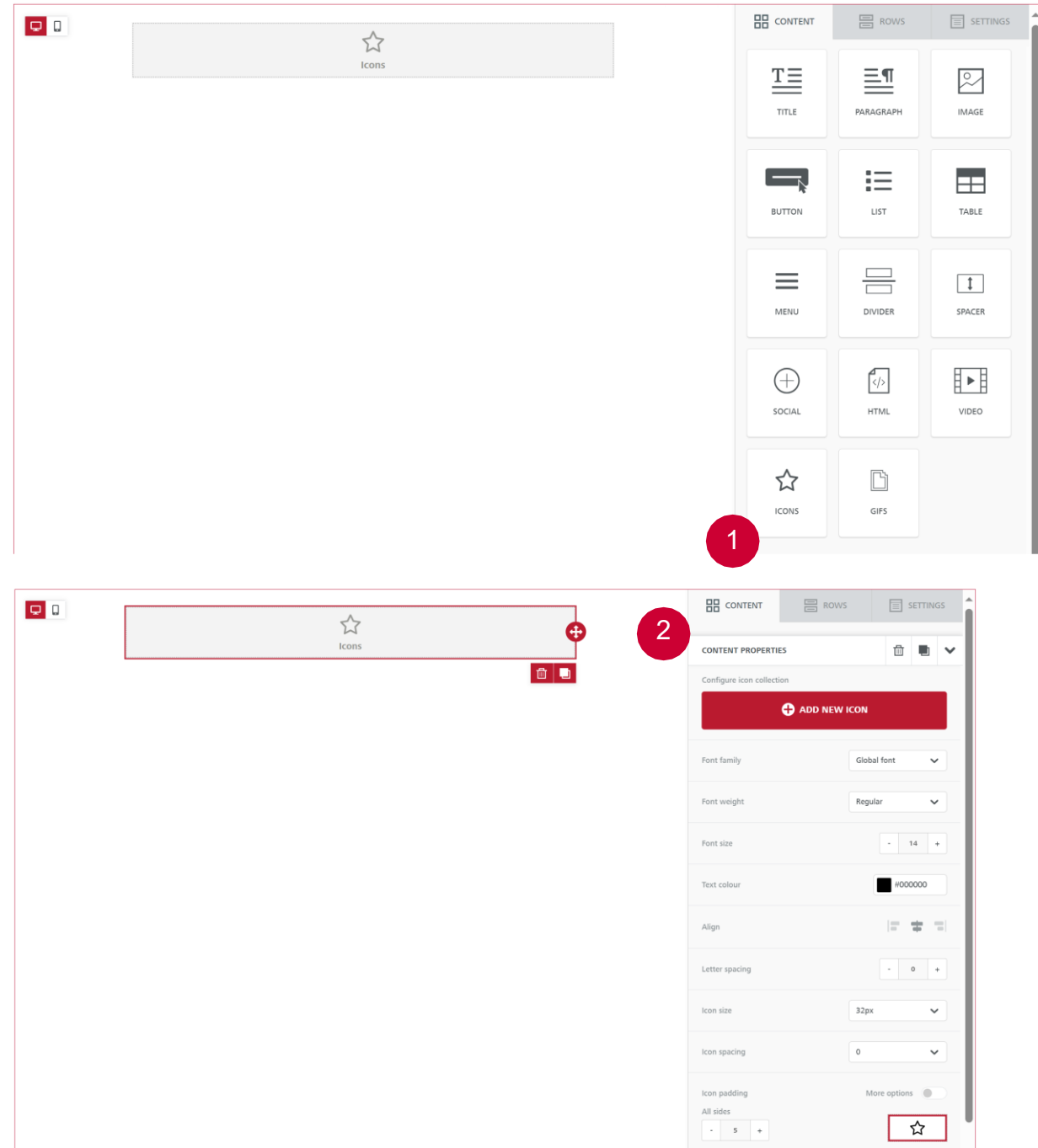
Once the URL has been inserted, you can choose your **play icon type, colour and size**



# Content: Icons

**Icon** allows you to include symbols of any kind, including emojis.

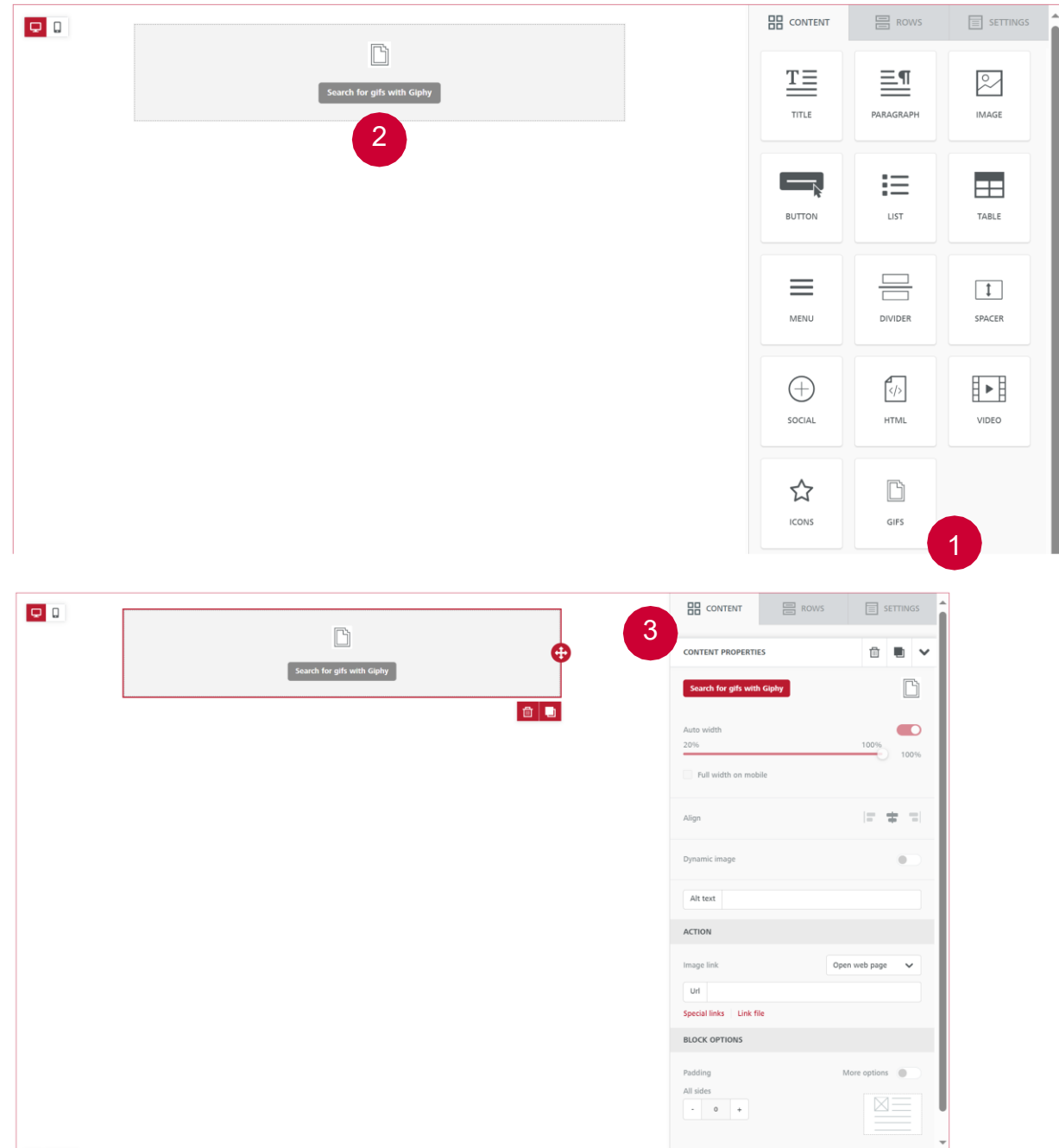
1. You can drag **Icons** into your chosen row
2. Within **Content Properties** you can apply your own icons and change the size via **Icon size** to match any supporting content



# Content: GIFs

**GIFs** allows you to add moving images to your content.

1. Drag the **GIFS** content block into your content
2. Search for GIFS using keywords
3. Once added, you can change sizes and padding to better suit your content.





# Desktop/Mobile View

Different viewing options (**desktop** and **mobile**) gives you an indication as to how your content will appear if viewed on either devices.

In the top right-hand corner, you will see this icon (pictured opposite)

- 1. You can toggle you view between **desktop**
- 2. As well as **mobile**



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Tractivity  
Create **impact** through stakeholder engagement

Issue 24

Thank you for downloading our April 2024 newsletter!

It's been a busy quarter here at Tractivity, and we've got lots of exciting things to announce in the neat future.

Find out more about upcoming plans here:

[View our Roadmap](#)

Our Upcoming Programme

Upcoming Event	Date & Time
Mailshot Webinar	30th April 2024
Events Invitations Webinar	3rd May 2024
Stakeholder Summit	TBA

[Sign up here!](#)

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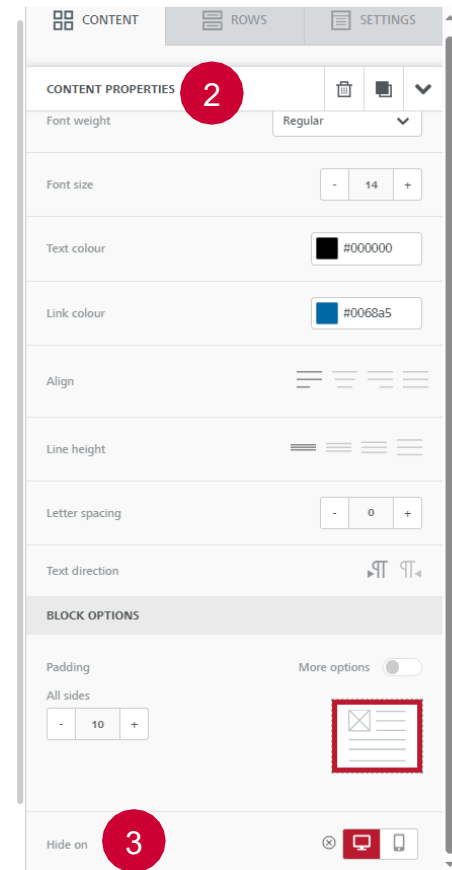
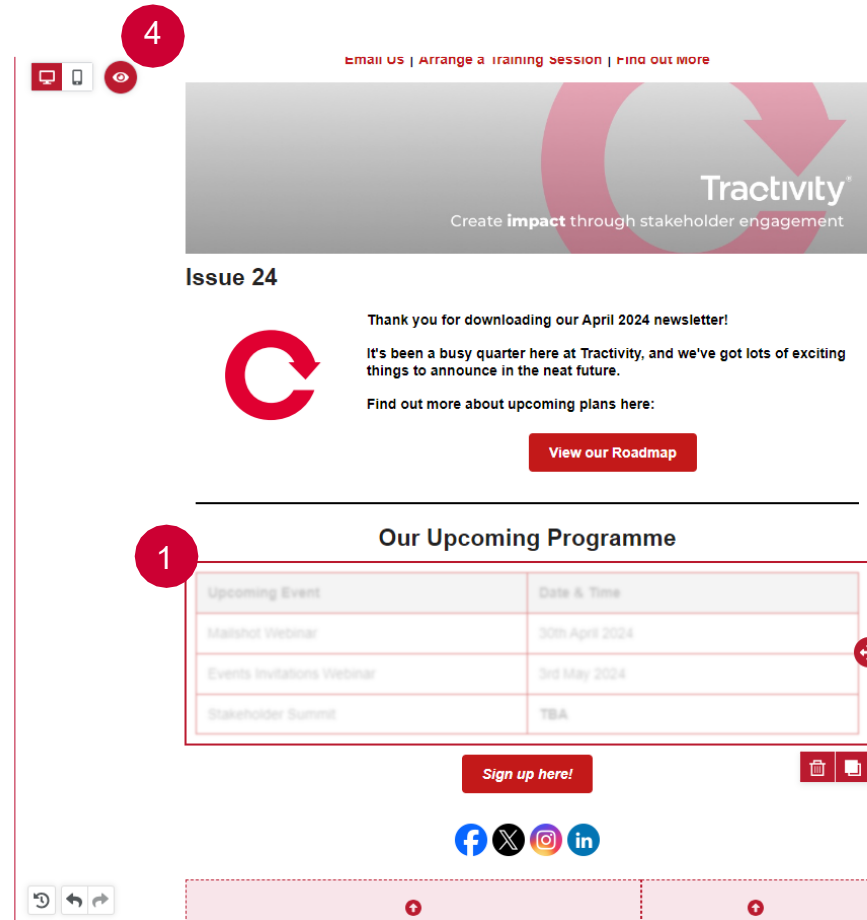
Our Upcoming Programme

Upcoming Event	Date & Time
Mailshot Webinar	30th April 2024
Events Invitations Webinar	3rd May 2024

# Desktop/Mobile: Hiding Content

When adding **Content** of any kind, you will have the ability to hide content on either a **Desktop** or **Mobile** device.

1. Select the piece of **Content** you wish to hide.
2. Go to **Content Properties** on the right-hand side and scroll to the bottom of all options.
3. You will see the final option: **Hide on**. Selecting either of the two options will **blur** the content and will not be visible in the view you select once sent to recipients.
4. You will see a new icon: **Visibility ON** to indicate there are hidden elements within the invitation.

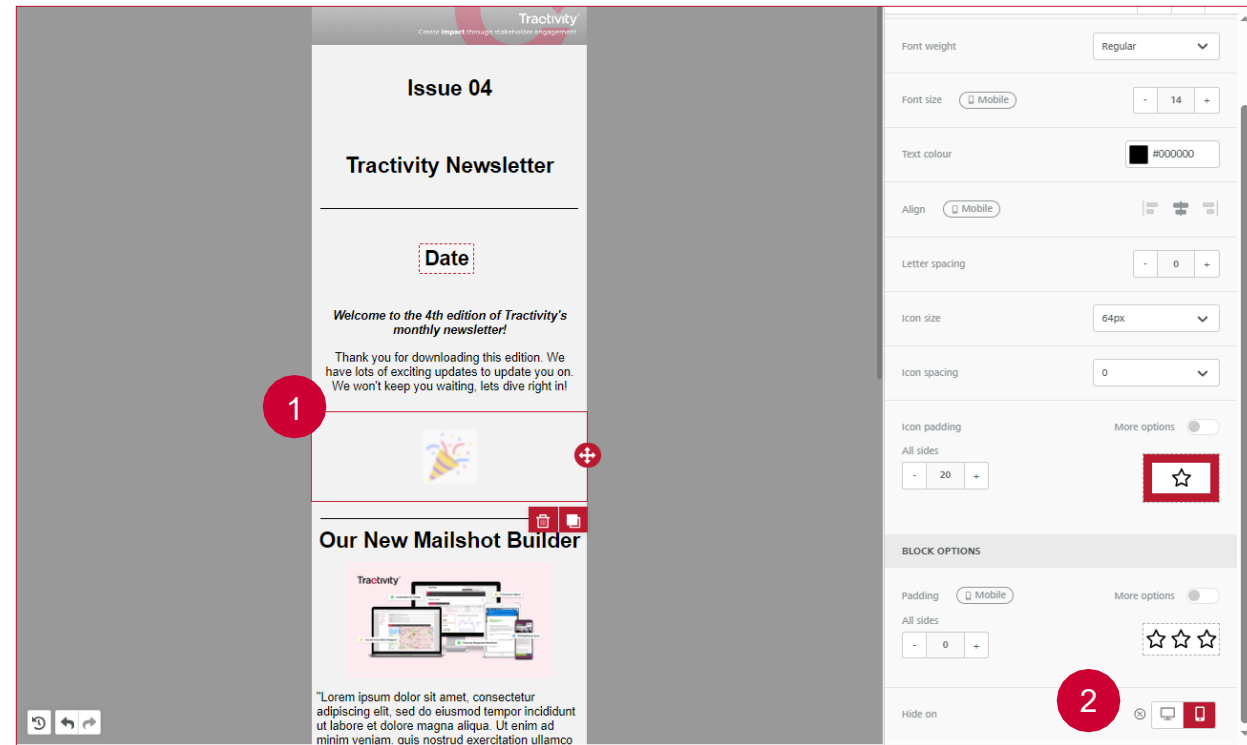


# Desktop/Mobile: Moving Content Separately (1/2)

Different viewing options means some content might be best placed differently on devices.

As you can hide certain content, **You can have certain content blocks in one place on desktop and somewhere else on mobile, and vice versa.**

1. Choose **content block**
2. Within **Content Properties**, click **hide on mobile** (this will then appear blurred)
3. Switch **Visibility OFF** (the content will no longer be blurred; **it won't be visible at all**)



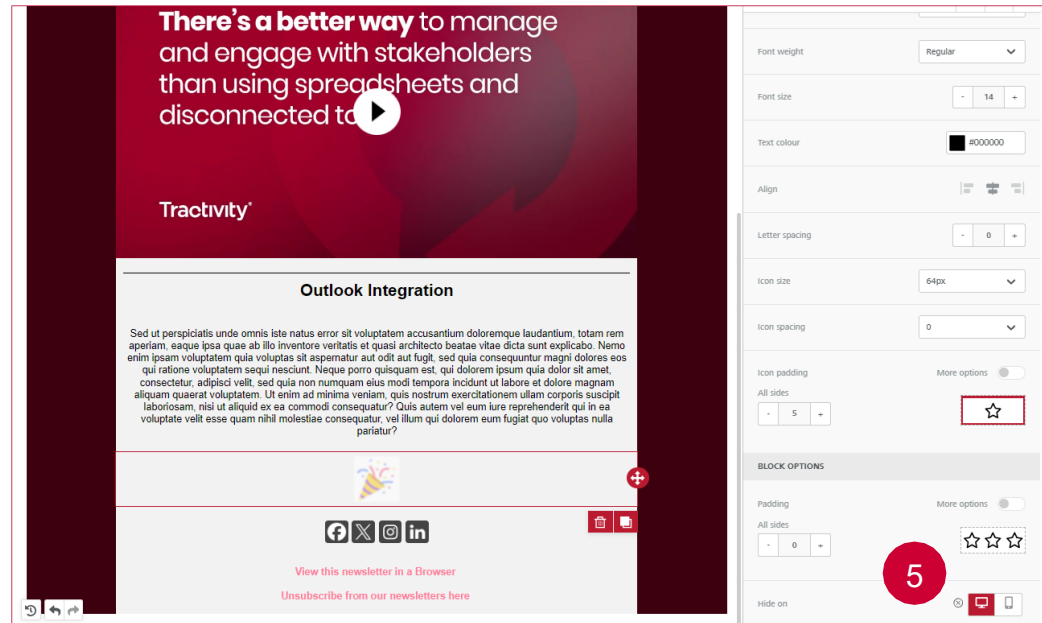
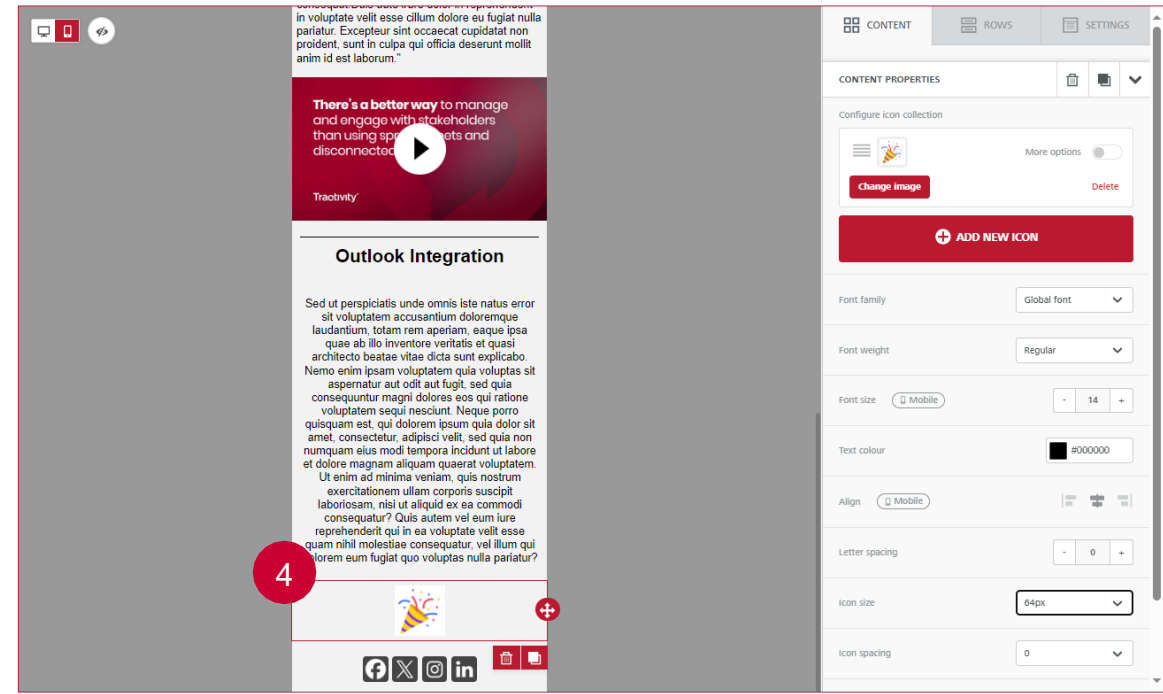
# Desktop/Mobile: Moving Content Separately (2/2)

4. Add a row on mobile and add content

5. Hide the content created in step 4 on Desktop

The content will then be in one place on **desktop** and somewhere else on **mobile**

(Please note the above steps can be done **vice versa!**)



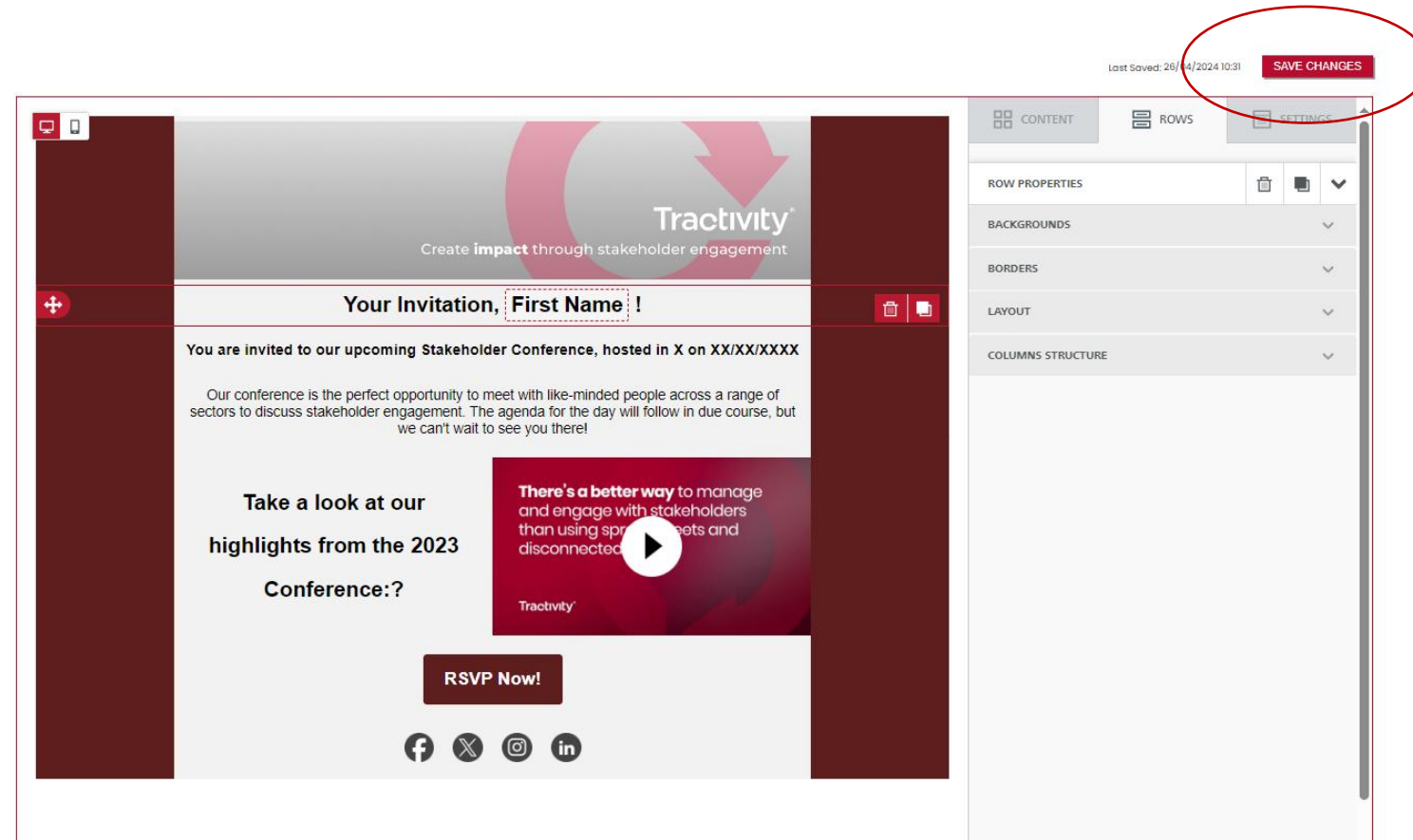
# Saving Changes

As you continue to build your mailshot, you will have the ability to save this as you go. This way, you don't have to worry about losing any progress.

Simply click **Save Changes** which will appear in the top right-hand corner of your mailshot builder.

**Please note:**

We recommend only 1 person actively edits a mailshot within the builder at any one time. The builder will only retain the most recent save, therefore if two people are working on the same mailshot simultaneously, some changes **will not be saved**.

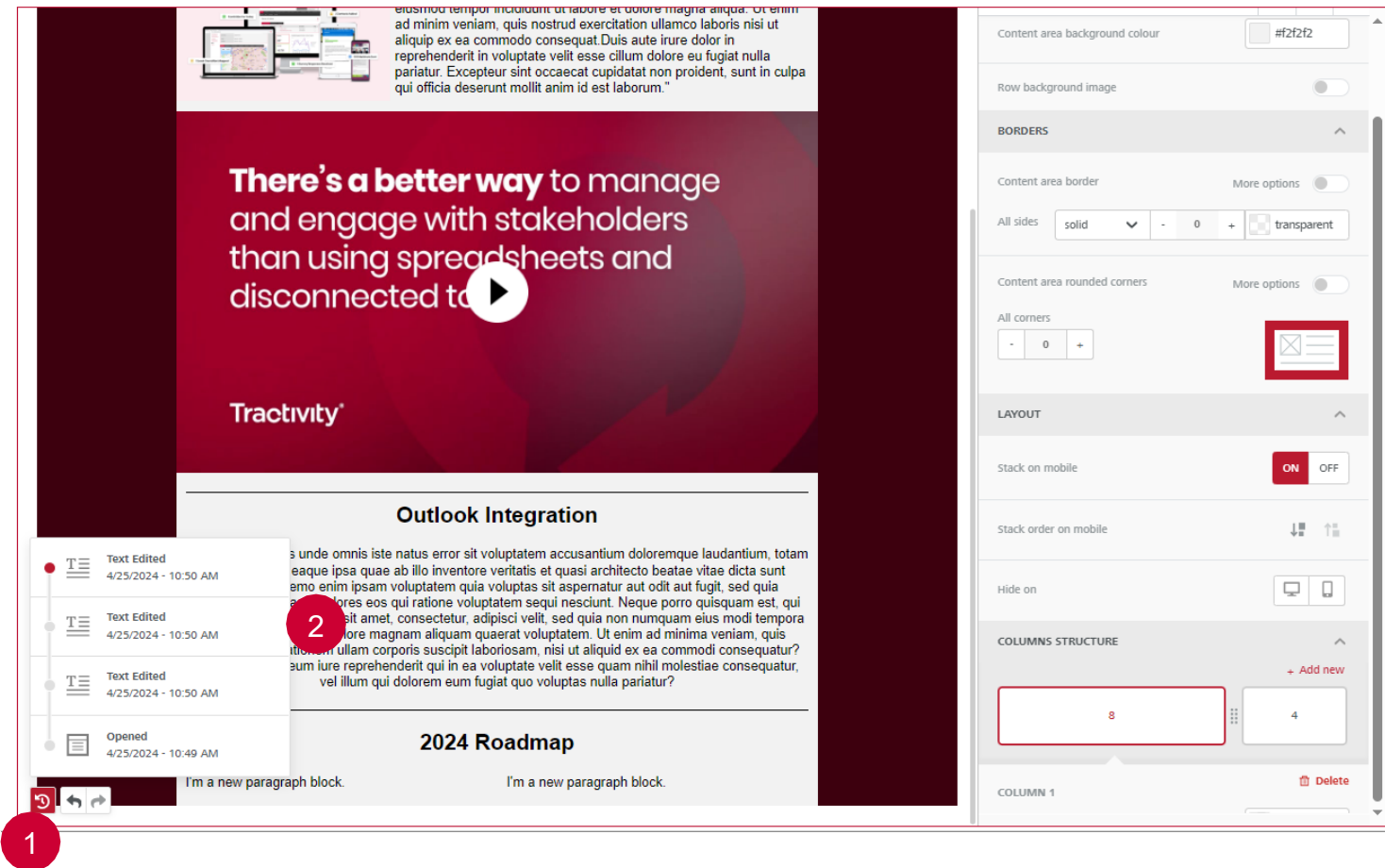


# Previous Version

**Previous Version** can help when it comes to any mistakes you make. You can skip back to before you made errors.

To find this option, scroll to the bottom left-hand side of the builder

1. In the left-hand corner you will see this icon (picture across the page). Click this to view the different stages
2. Select the relevant stage you wish to revert to and continue to edit your mailshot



# Client Branding

Please ensure you have your brand guidelines to hand when creating a mailshot inside our new builder.

Previously, you provided Tractivity with your branded colours. This is no longer the case, and you can input HEX codes within **Content Properties** of the text/colours you wish to apply to your mailshot.

Within **Settings** you can set a default font, so this is consistent across your mailshot.

Text colour	<div><div></div>#000000</div>
Link colour	<div><div></div>#e01253</div>

CONTENT PROPERTIES

Font weight

Bold

Font size

- 23 +

Text colour

#000000

Link colour

#e01253

Align

Line height

Letter spacing

- 0 +



CONTENT ROWS SETTINGS

GENERAL OPTIONS

Content area width

675px

Content area alignment

Left Center

Background colour

#d50032

Content area background colour

#ffffff

Default font

Arial

Link colour

#ff819c

# Special Links: Overview

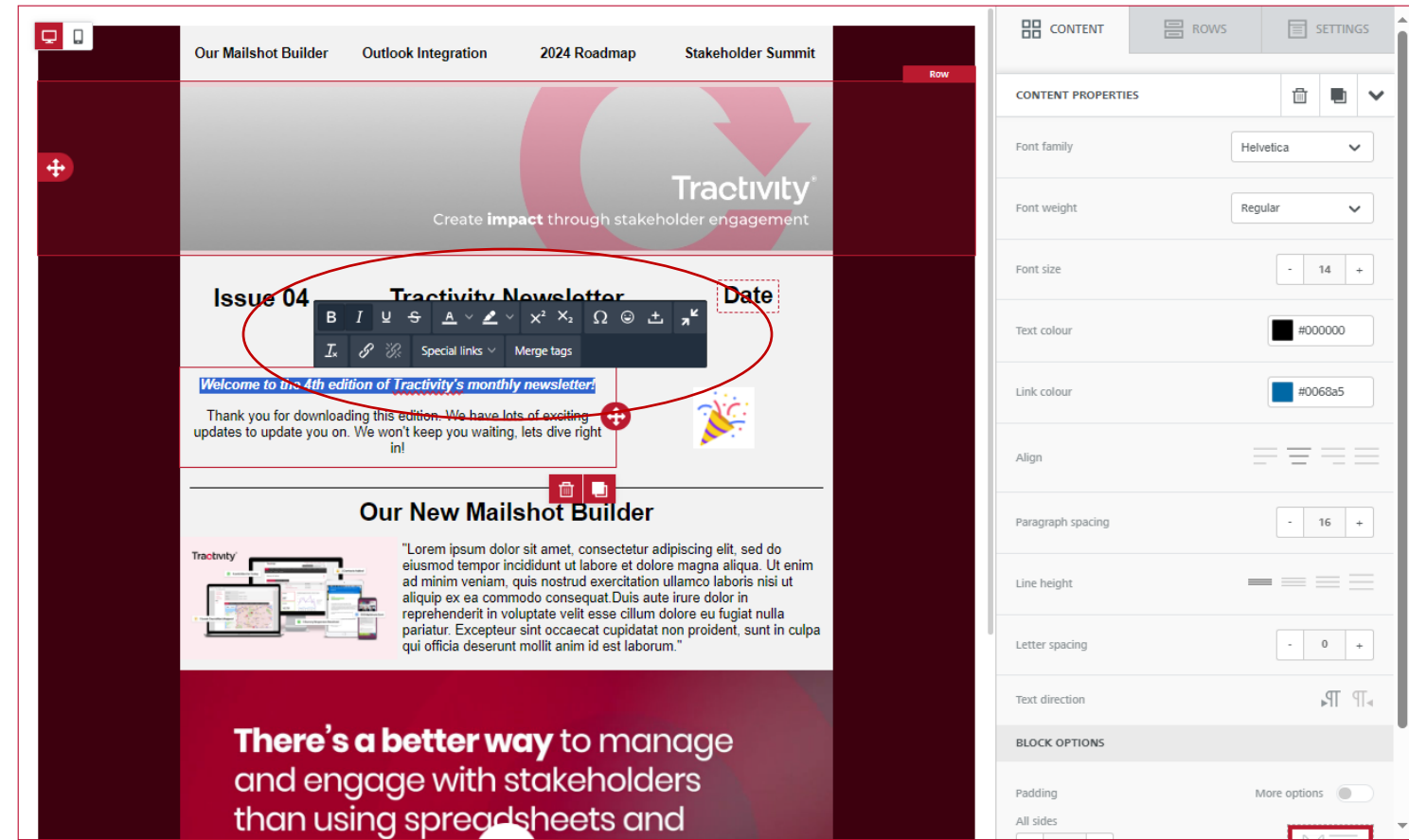
**Special Links** allows you to include specific links. This is slightly different to the **Button** content feature.

You will be able to access **Special Links** within a **Title** and/or **Paragraph** block so you can insert links where appropriate.

There are different types of **Special Links**.

These are:

1. **Special Links: Body**
2. **Special Links: Footer**
3. **Special Links: Events**





# Special Links: Events - URL

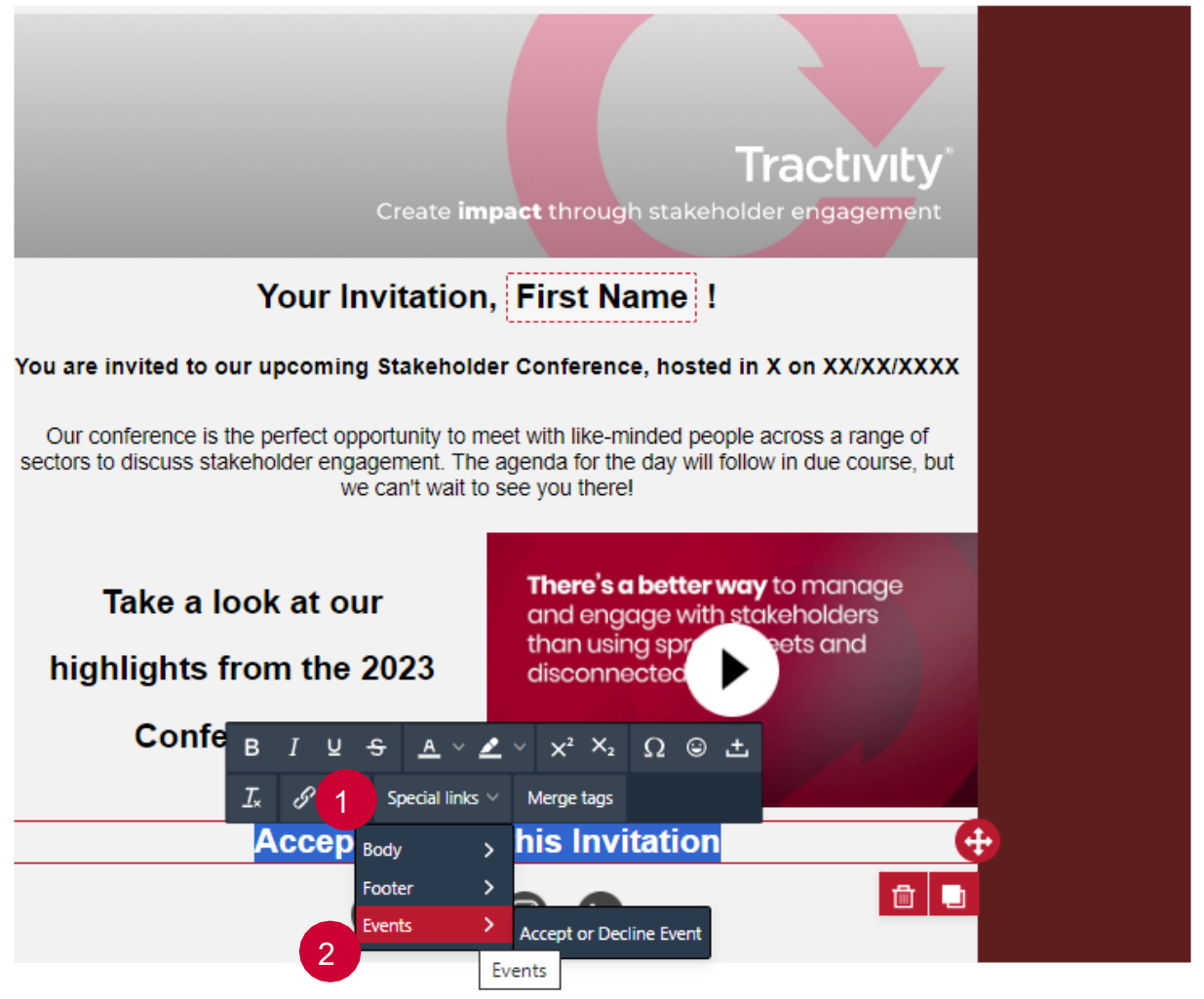
**Special Links: Events** allows you to include an **Accept/Decline** link into your email invitation.

There are two ways to use this. **URL** and via the **Button** content block.

## URL:

1. Highlight your preferred text and select **Special links**
2. Select **Events > Accept or Decline Event**

The highlighted text will now be a link which stakeholders can click to take them to the **Accept/Decline Events** page.



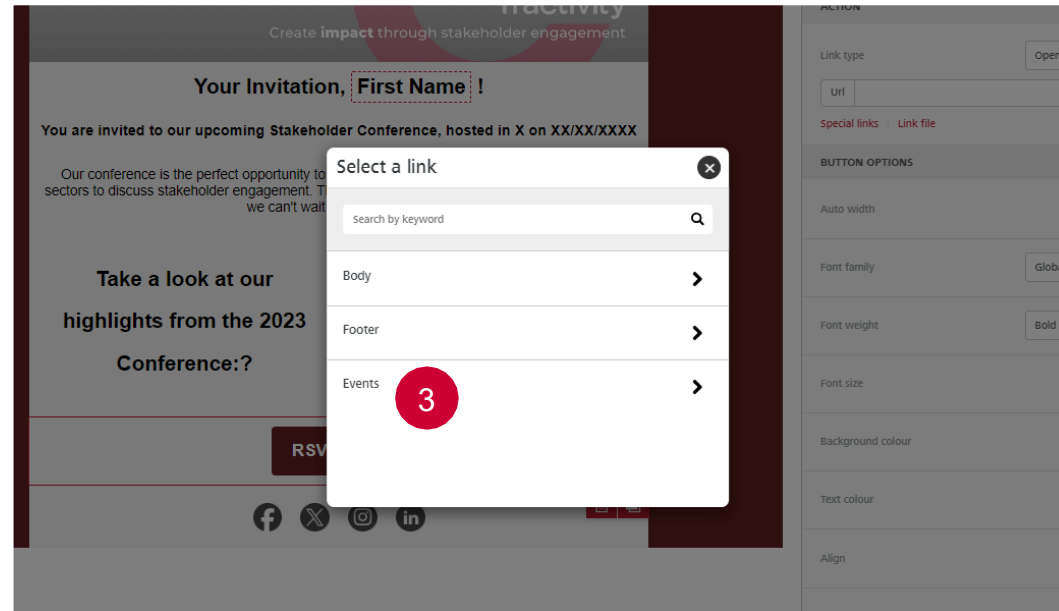
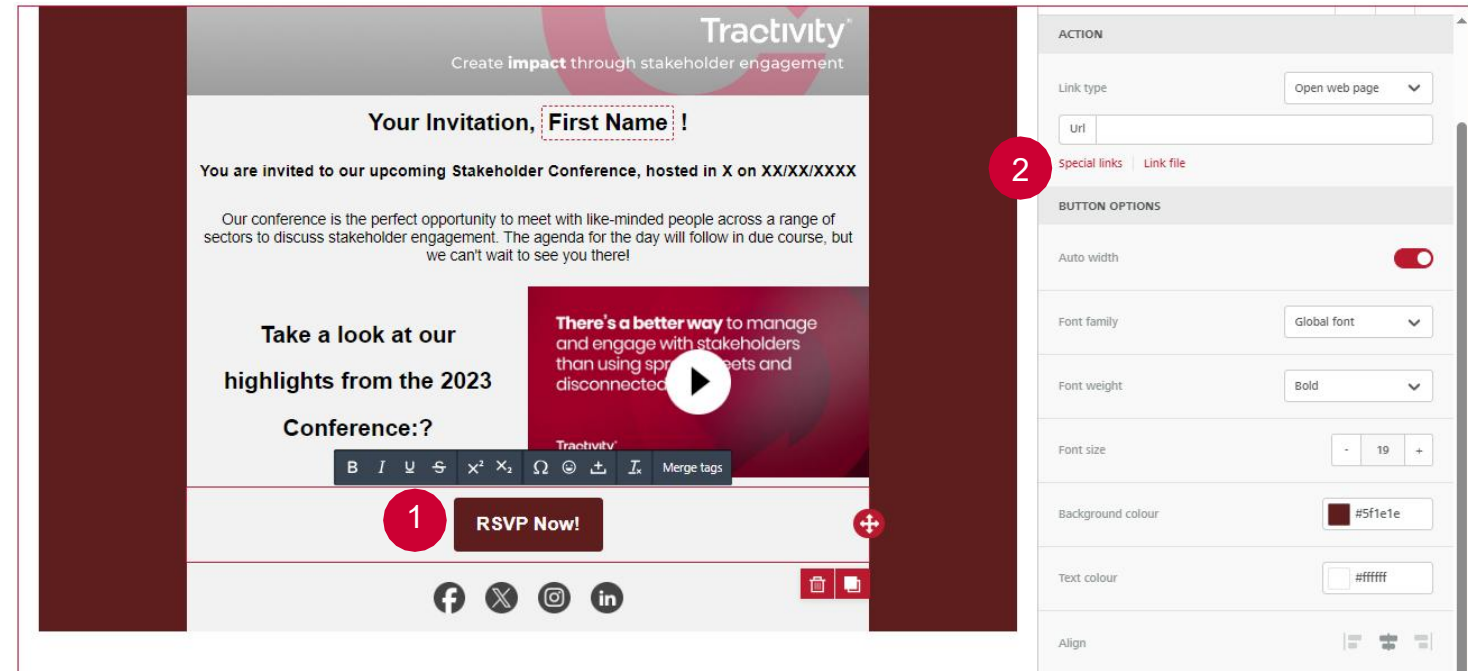
# Special Links: Events – Button (1/2)

**Special Links: Events** allows you to include an **Accept/Denial** link into your email invitation.

There are two ways to use this. **URL** and via the **Button** content block.

## Button

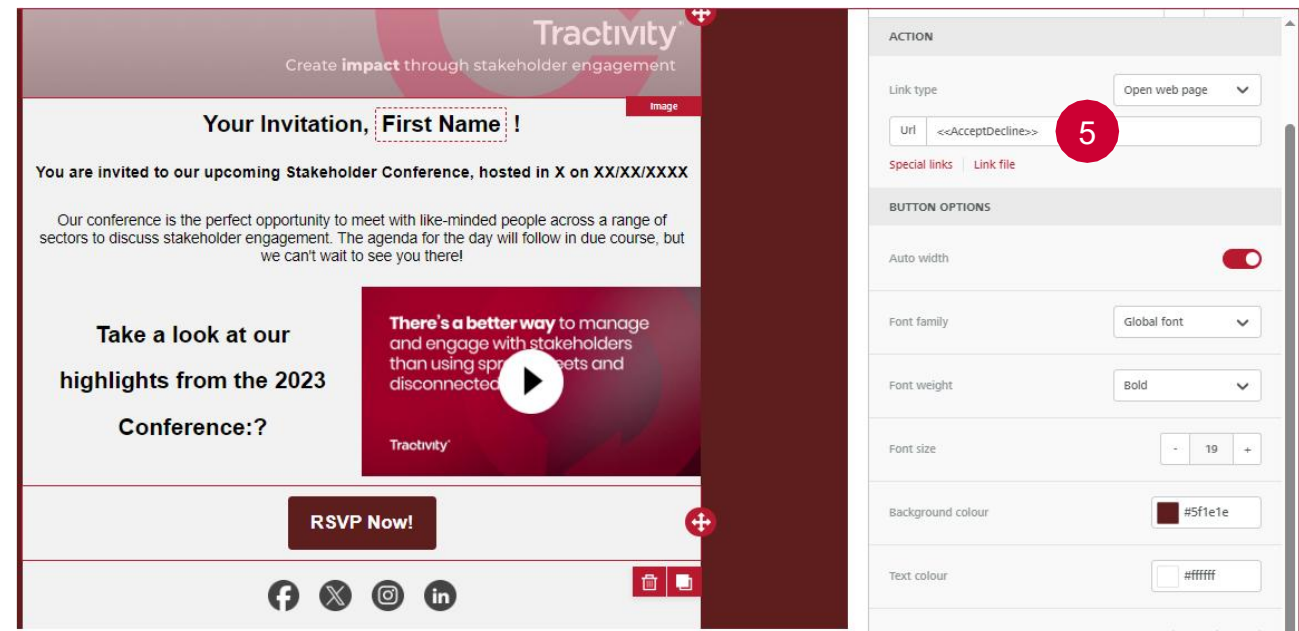
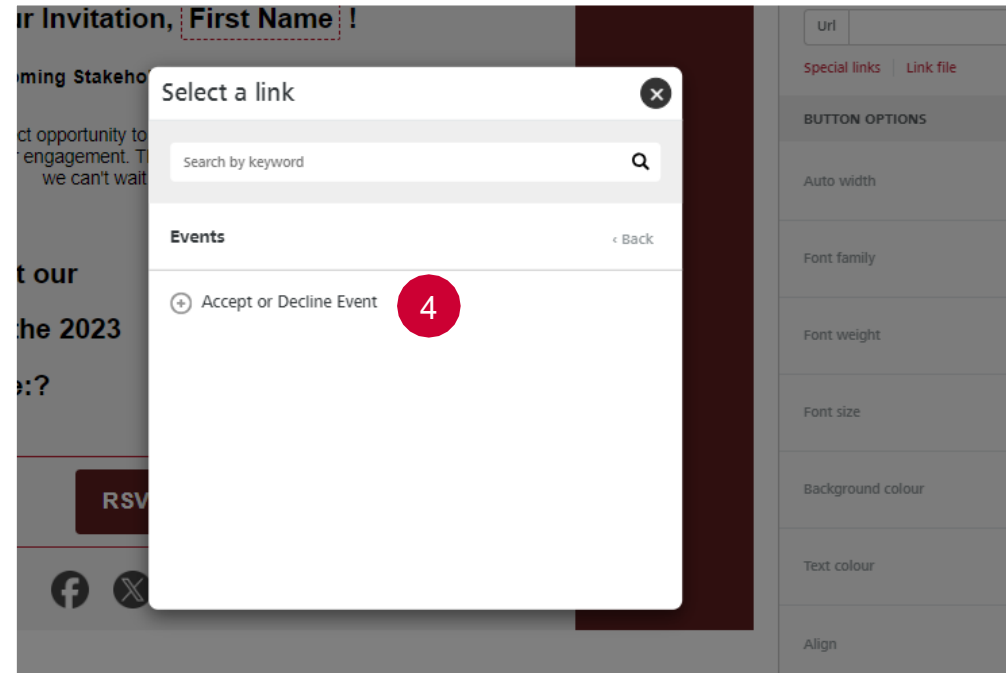
1. Add your **Button** content with the relevant wording
2. Under **Action – Link Type**, click **Special Links**
3. Select **Events**



## Special Links: Events – Button (2/2)

4. Select **Accept or Decline Event** option
5. In the URL space the format **<<AcceptDecline>>** will appear.

When the invitation is sent to stakeholders, clicking the **Button will take them to the Accept and Decline Event page.**



# Merge Field

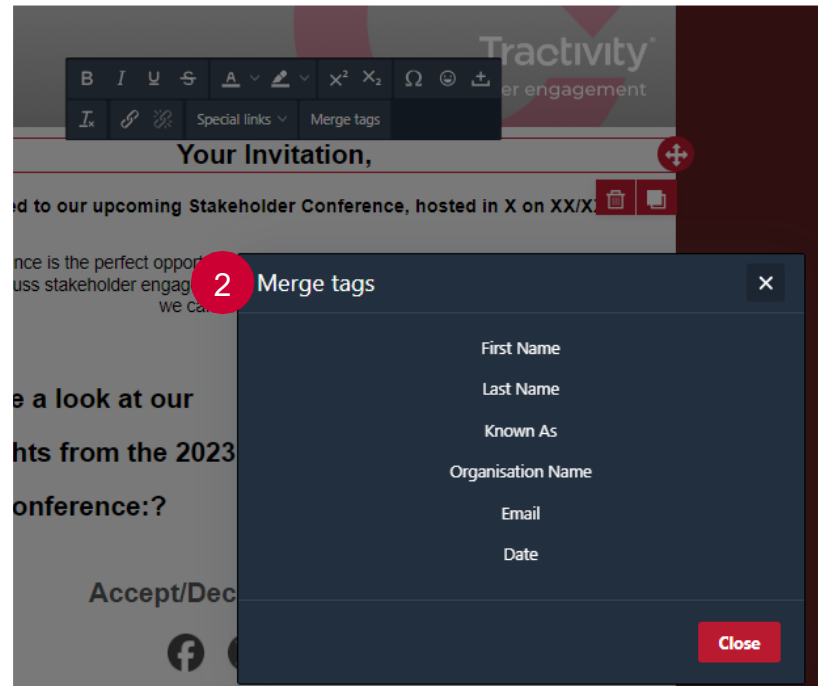
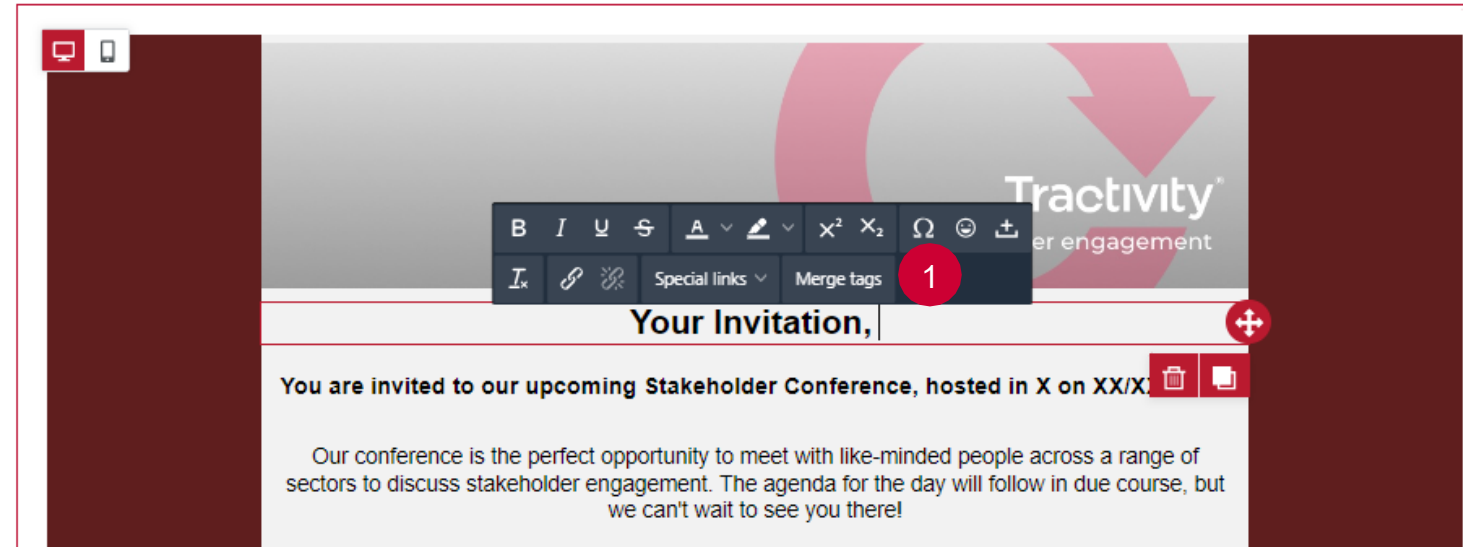
**Merge Field** means you can address your recipients personally.

1. The **Merge Field** will use the Contact information stored within Tractivity.

2. The fields you can use are:

- **First Name**
- **Last Name**
- **Known As**
- **Organisation Name**
- **Email**
- **Date**

**Merge Field** can be used within a **title** and/or **paragraph** block. Select **Merge tags** and select **the appropriate tag** to insert it into your content.



# Send Invitations

Now that you've completed your event invitation, you can exit the builder and will be presented with some options.

**Send Email** – this will trigger the send of the invitation to all recipients immediately

**Edit Email** – go back to the builder and make more changes

**Send Test** – if invitations require sign-off prior to send, send a test to a colleague or yourself

**Save As Template** – you might find it easier to save this invitation as a template for later use

## SmartMailer: Event Email Content

SEND EMAIL

EDIT EMAIL

SEND TEST

SAVE AS TEMPLATE

BACK

Email Contents

Tractivity

Create **impact** through stakeholder engagement

Your Invitation, <|Firstname|> !

You are invited to our upcoming Stakeholder Conference, hosted in X on XX/XX/XXXX

Our conference is the perfect opportunity to meet with like-minded people across a range of sectors to discuss stakeholder engagement. The agenda for the day will follow in due course, but we can't wait to see you there!

Take a look at our highlights from the 2023 Conference:

There's a better way to manage and engage with stakeholders than using spreadsheets and disconnected

Tractivity

RSVP Now!

f

X

@

in