Outlook Integration

Outlook Integration

This feature allows you to add email and meetings automatically from your Outlook.

Tractivity software now integrates with Microsoft Outlook, allowing users to add emails and meetings from their Outlook seamlessly to Tractivity.

The integration will also allow users to create new contacts and enquiries directly from Outlook.

Add Emails to Tractivity

When inside the Outlook application, across the top ribbon, you will now see the Tractivty logo.

1. Click on the logo to open the Tractivity Integration

2. Add your Tractivity URL into the space provided and click **Log In**.

3. You will then be asked to log in either using Single Sign On or with a username and password (depending on your organisation's preference).
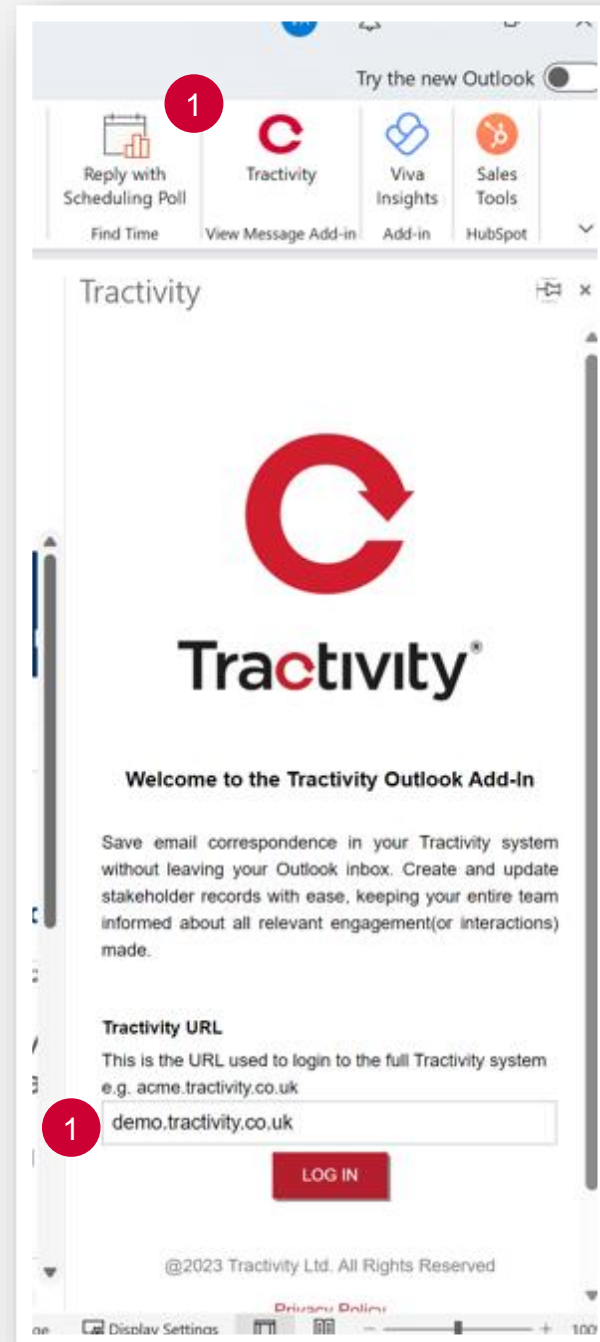
Add Emails to Tractivity

When inside the Outlook application, across the top ribbon, you will now see the Tractivty logo.

1. Once logged into the application, click on any email in your inbox.

2. The add-inn will then show all the details currently available inside of Tractivity

3. The drop-down will show all the projects you can access inside your Tractivity system. If you only have one project, just one project will appear.

4. Email Recipients who are stakeholders recorded inside Tractivity are shown as Red circles

5. Email Recipients who can't be found inside of Tractivity are shown as a Grey Circle.
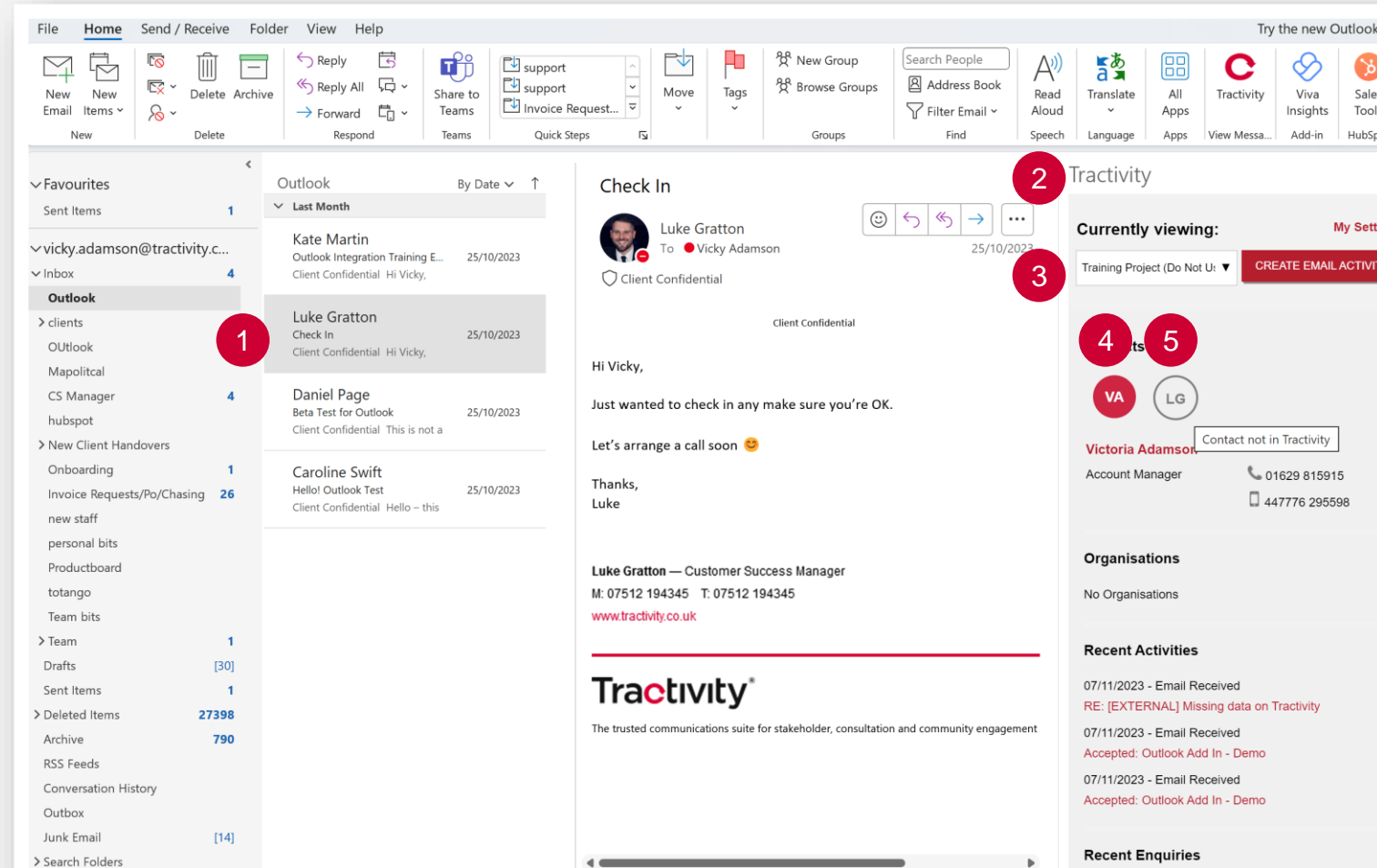
Add New Contacts

Before clicking Create Email Activity, its important to ensure all your email recipients are contacts inside of Tractivity. If you see any contact as a grey circle:

1. Click on the **grey circle,** please note when you hover over the grey circle you will see text that advise 'contact not in Tractivity'

2. To add the contact, Click **Add Contact to Tractivity**

Add New Contacts

By clicking add contact, the screen will be auto-populated with the details found in the email :

1. **Main Details,** shows the standard information you can record. This will always appear, alongside any mandatory contact fields. This ensures you capture important information for your project from the Outlook integration.

2. You can search for an organisation and link to your contact here. Please note - the organisation has to be added to Tractivity already.

3. Once you are happy, **Save Details**.

Add Email to Tractivity

Once your contact has been added, the circle will now be red. You can now add your email activity to Tractivity.

1. Click, **Create Email Activity**

Add Email to Tractivity

This screen will allow you to add the email to your Tractivity system, whether you attach it to an existing enquiry, a new enquiry or save as a contact activity:

1. Select the **Contacts** you wish to attach to the activity.

2. **Organisations** which are linked to the contacts will appear here.

3. **Sub Projects,** select all that apply.

Add Email to Tractivity

You have three options when adding an email via the integration tool:

1. **Add as a contact activity,** tick the contacts, organisation and sub-projects and click Save

2. **Add as an enquiry activity to an existing enquiry; tick** the Enquiry Title you wish to attach the activity too.

Or

3. **Add as an enquiry activity against a new enquiry,** press create a new enquiry.

Attach Email to a new Enquiry

When selecting to create a new enquiry, you will be able to add information similar to how you add information inside of Tractivity from the **Add Enquiry screen.**

1. **Enquiry title**

2. **Link to associated organisations –** if the contacts are linked to organisations, you can tick them here.

3. The fields shown here will depend on the project's Field Configuration for the Add Enquiry Screen. **Mandatory fields will only be shown.**

4. **Create Enquiry** (to save)

Tractivity

Selected Project : **Training Project (Do Not Use)**

Create a new Enquiry to associate this Event to:

Enquiry Details

Main Contact for Enquiry

Vicky Adamson

Enquiry Title

(1) Meeting Renewable Energy

Associated Organisation

(2) No Organisation

Enquiry Status

Live

(3) **Account Handler**

Adamson, Vicky

Notes

All emails linked to renewable energy talks with Vicky and Luke

(4)

CREATE ENQUIRY

Attach Email to an Existing Enquiry

When selecting to add information to an existing enquiry:

1. Scroll down to the enquiry title and tick the enquiry you wish to attach too.
2. Confirmation of the activity has been saved.

You can log in to Tractivity, search for the contact and see all activity.

Adding Outlook Meetings to Tractivity

1. Inside Outlook, when looking at the calendar, click on the meeting you wish to add to Tractivity.

2. When viewing the meeting, inside the ribbon, you can open the Tractivity outlook integration.

3. The activity will be added as either a **Contact Activity** or an **Enquiry Activity.**
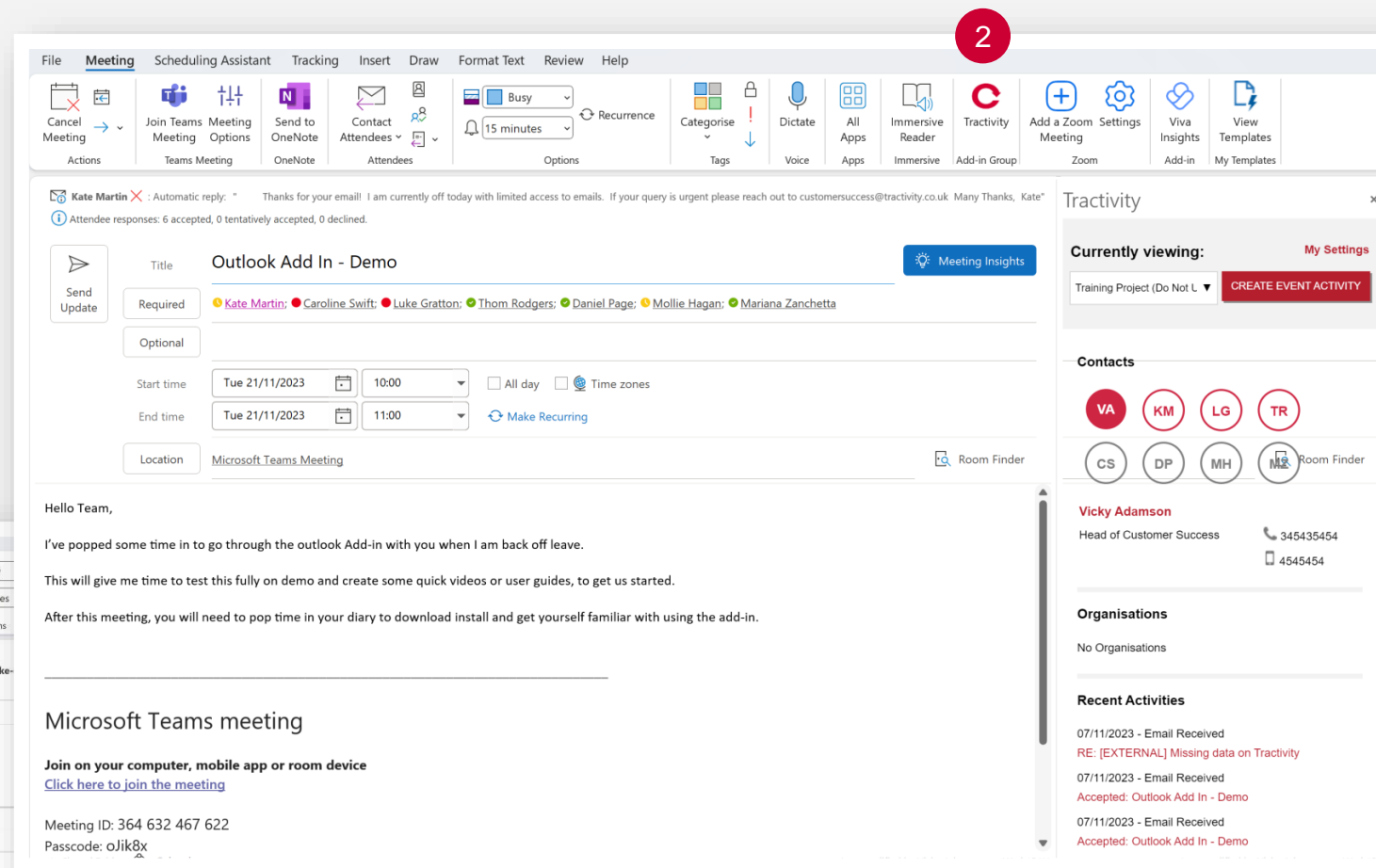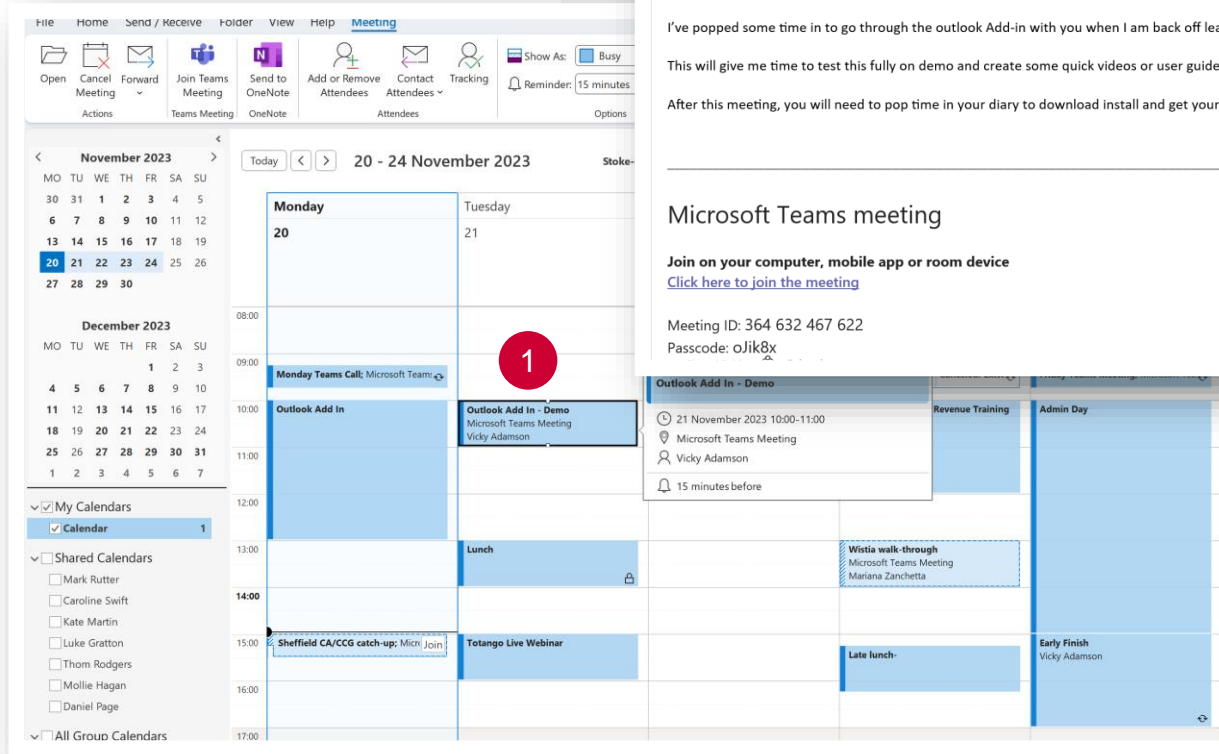
Adding Outlook Meetings to Tractivity

The screen looks similar to when adding an email as an activity.

1. Select the project you wish to add to the meeting.

2. Add contacts shown as grey circles before clicking Create event Activity.

3. Click **Create Event Activity**

Adding Outlook Meetings to Tractivity

The screen looks similar to when adding an email:

1. Select the **Contacts** you wish to attach to the activity.

2. **Organisations** which are linked to the contacts will appear here.

3. **Sub Projects,** select all that apply

Adding Outlook Meetings to Tractivity

You have the same three options, you have when adding an email:

1. **Add as a contact activity,** tick the contacts, organisation and sub projects and click Save

2. **Add as an enquiry activity to existing enquiry,** tick the Enquiry Title you wish to attach the activity too.

or

3. **Add as an enquiry activity against a new enquiry,** press create new enquiry.

Activities Inside Tractivity

When saved, you can find the information inside of Tractivity.

1. **Outlook Calendar Meeting** is added inside Tractivty as an activity with an activity-type event.

2. **Outlook Emails** are added to Tractivity as an activity with an activity-type email.

In both of the above, the activities can be added as either a Contact Activity or and Enquiry Activity.

Tractivity®

If you need any further help, please contact your dedicated Customer Success Manager or email customersuccess@tractivity.co.uk