

Outlook Integration

Tractivity® Help Guides

Outlook Integration

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

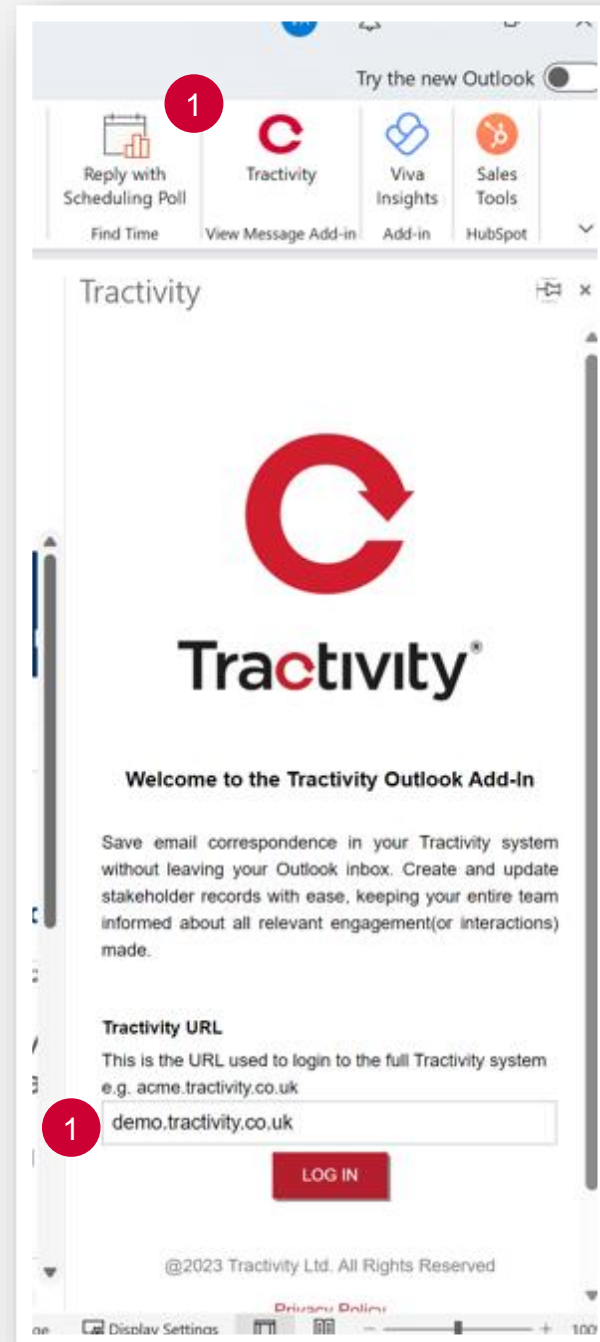
Tractivity software now integrates with Microsoft Outlook, allowing users to add emails and meetings from their Outlook seamlessly to Tractivity.

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 Tractivity logo.

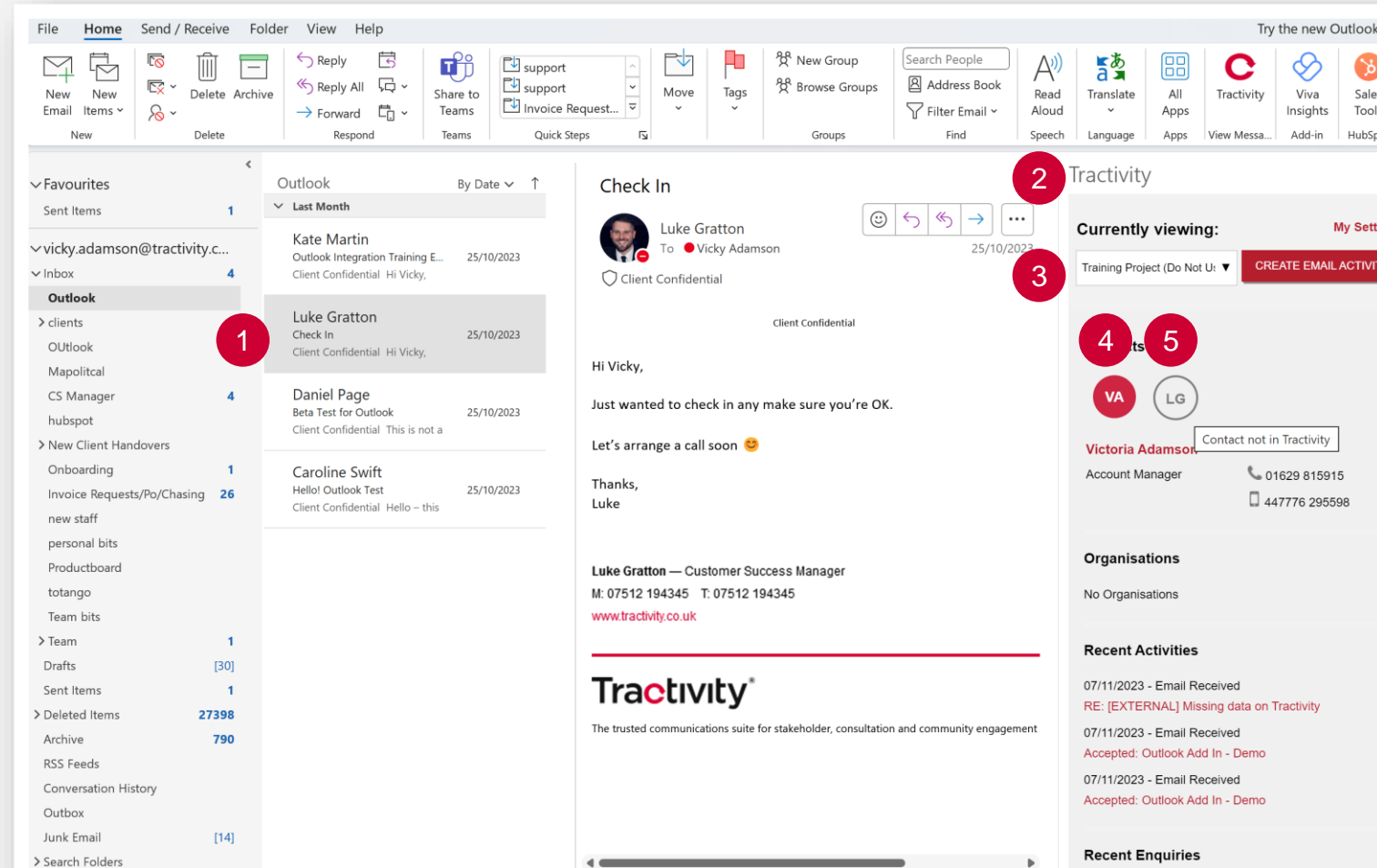
1. Click on the logo to open the Tractivity Integration
2. Add your Tractivity URL into the space provided and click **Log In**.
3. You will then be asked to log in either using Single Sign On or with a username and password (depending on your organisation's preference).



Add Emails to Tractivity

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

1. Once logged into the application, click on any email in your inbox.
2. The add-in 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**

Check In



Luke Gratton
To ● Vicky Adamson
25/10/2023

☺

↶

↷

➡

⋮

Client Confidential

Client Confidential

Hi Vicky,

Just wanted to check in any make sure you're OK.

Let's arrange a call soon 😊

Thanks,
Luke

Luke Gratton — Customer Success Manager
M: 07512 194345 T: 07512 194345
www.tractivity.co.uk

Tractivity®

The trusted communications suite for stakeholder, consultation and community engagement

Tractivity

Currently viewing: Training Project (Do Not Use ▼) **CREATE EMAIL ACTIVITY**

Contacts 1

VA

LG

Luke Gratton

⚠ This Contact does not exist in Tractivity


ADD CONTACT TO TRACTIVITY 2

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**.






Check In




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To  Vicky Adamson

25/10/2023



 Client Confidential

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1

Main details

First Name

Last Name

Email

Telephone

Mobile

Job Title

2

Organisation Details

SEARCH

3


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**

Check In



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Tractivity

Currently viewing:



1

[My Settings](#)

Training Project (Do Not U: ▼


CREATE EMAIL ACTIVITY


Contacts



Victoria Adamson

Account Manager

 01629 815915

 447776 295598

Organisations

No Organisations

Recent Activities

07/11/2023 - Email Received

RE: [EXTERNAL] Missing data on Tractivity

07/11/2023 - Email Received

Accepted: Outlook Add In - Demo

07/11/2023 - Email Received


Accepted: Outlook Add In - Demo


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.

Check In



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Tractivity

Complete the required information below to add the new Activity to Tractivity:

1

Contacts

☒ **Select All**

☒ Vicky Adamson☒ Luke Gratton

2

Organisations

☐ **Select All**

3

Sub Projects

☐ **Select All**

☐ Consultation D☐ Consultation A☐ Consultation B☐ Consultation C

Enquiries

Filter by:

Most Recent

☐ **Enquiry Title**

☐ Test Meeting 1

☐ Meeting

☐ Complaint

☐ **Make Notes Confidential?**

Only you will be able to view email notes and attachments

SAVE

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.

Check In



Luke Gratton
To  Vicky Adamson

25/10/2023

 Client Confidential

Client Confidential

Hi Vicky,

Just wanted to check in any make sure you're OK.

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Complete the required information below to add the new Activity to Tractivity:

Contacts

☒ Select All

☒ Vicky Adamson

☒ Luke Gratton

Organisations

☐ Select All

Sub Projects

☐ Select All

☐ Consultation D

☐ Consultation A

☐ Consultation B

☐ Consultation C

Enquiries

1 CREATE NEW ENQUIRY

2 Filter by: Most Recent

☐ Enquiry Title

☐ Test Meeting 1

☐ Meeting

☐ Complaint

☐ Make Notes Confidential?

Only you will be able to view email notes and attachments

3 SAVE

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)

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.

Tractivity

Contacts

☐ Select All

☐ Vicky Adamson

Organisations

☐ Select All

Sub Projects

☐ Select All

☐ Consultation D

☐ Consultation A

☐ Consultation B

☐ Consultation C

Enquiries

Filter by:

Most Recent

☐ Enquiry Title

☐ Test Meeting 1

☐ Meeting

☐ Complaint

Tractivity

1

Email Activity Details

BACK

Selected Project : Training Project (Do Not Use)

2

This email was saved on 25/10/2023 at 16:03.

Enquiry Activities

Meeting

Organisation Activities

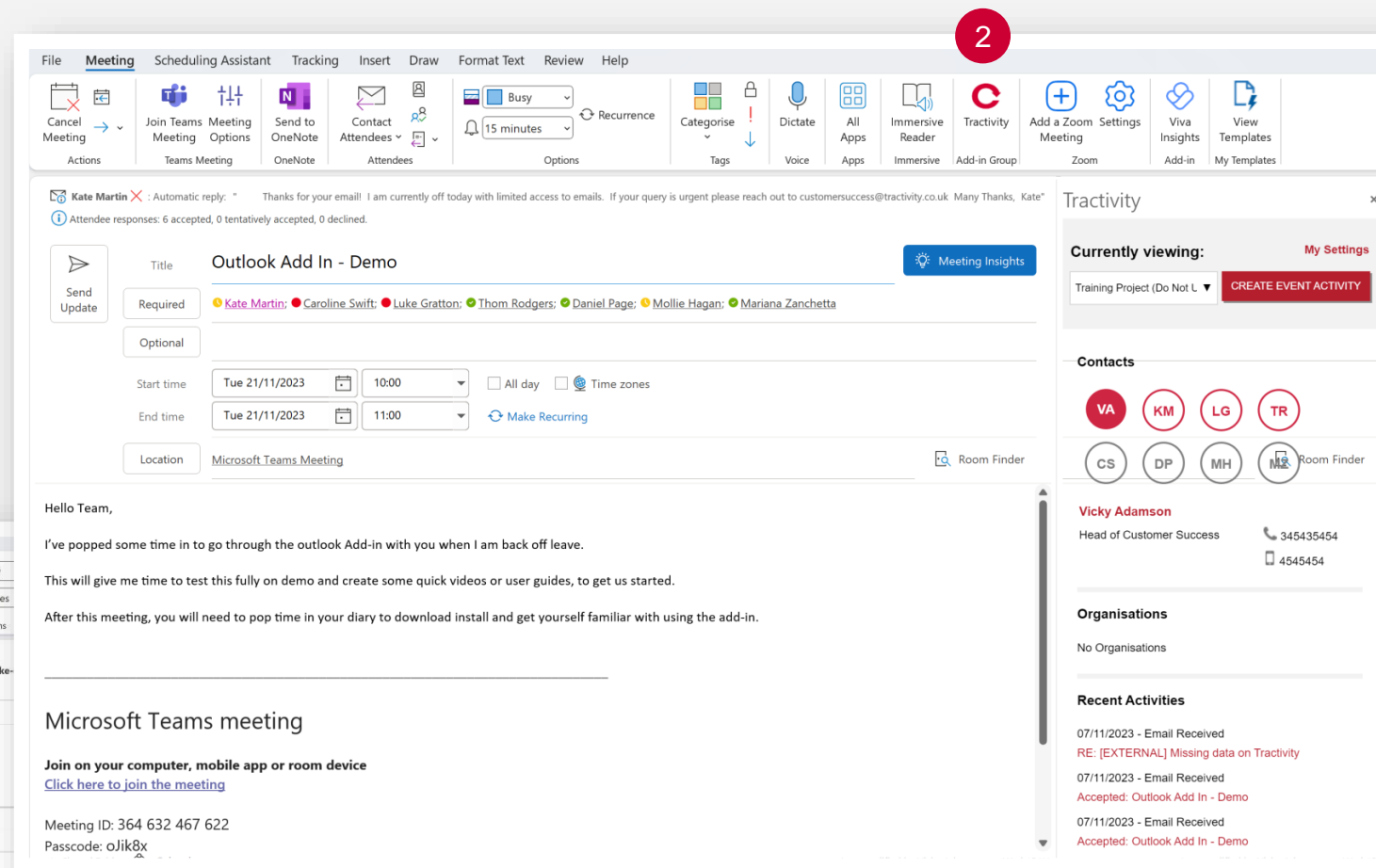
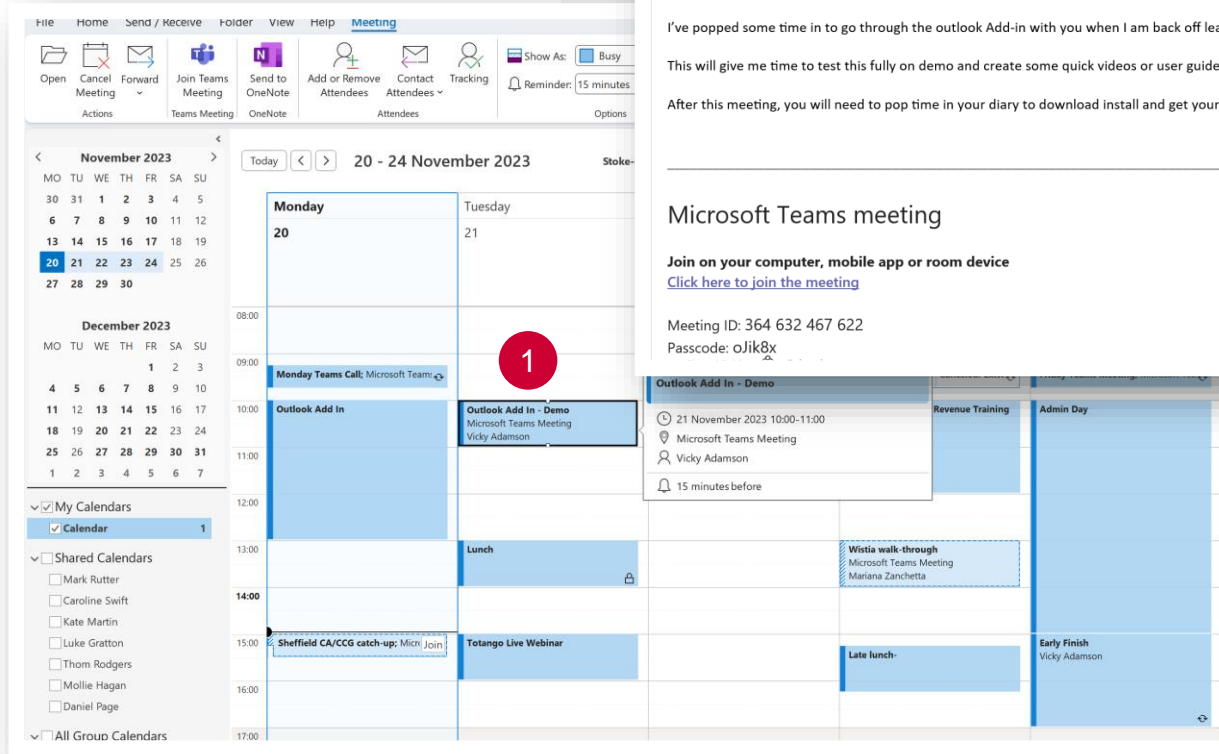
No Organisation

Contact Activities

No Contacts

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**

File Meeting Scheduling Assistant Tracking Insert Draw Format Text Review Help

Cancel Meeting → Join Teams Meeting Meeting Options Send to OneNote Contact Attendees 15 minutes Recurrence Categorise Tags Voice All Apps Immersive Reader Tractivity Add a Zoom Meeting Settings Viva Insights View Templates

Kate Martin: Automatic reply: " Thanks for your email! I am currently off today with limited access to emails. If your query is urgent please reach out to customersuccess@tractivity.co.uk Many Thanks, Kate"

Attendee responses: 6 accepted, 0 tentatively accepted, 0 declined.

Send Update

Title Outlook Add In - Demo Meeting Insights

Required Kate Martin, Caroline Swift, Luke Gratton, Thom Rodgers, Daniel Page, Mollie Hagan, Mariana Zanchetta

Optional

Start time Tue 21/11/2023 10:00 All day Time zones

End time Tue 21/11/2023 11:00 Make Recurring

Location Microsoft Teams Meeting Room Finder

Hello Team,

I've popped some time in to go through the outlook Add-in with you when I am back off leave.

This will give me time to test this fully on demo and create some quick videos or user guides, to get us started.

After this meeting, you will need to pop time in your diary to download install and get yourself familiar with using the add-in.

Microsoft Teams meeting

Join on your computer, mobile app or room device

[Click here to join the meeting](#)

Meeting ID: 364 632 467 622

Passcode: oJik8x

Tractivity

Currently viewing: Training Project (Do Not L... CREATE EVENT

Contacts

VA KM LG TR

CS DP MH MR

Vicky Adamson

Head of Customer Success 3454 4545

Organisations

No Organisations

Recent Activities

07/11/2023 - Email Received

RE: [EXTERNAL] Missing data on Tractivity

07/11/2023 - Email Received

Accepted: Outlook Add In - Demo

07/11/2023 - Email Received

Accepted: Outlook Add In - Demo

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

File Meeting Scheduling Assistant Tracking Insert Draw Format Text Review Help

Cancel Meeting → Actions Join Teams Meeting Options Teams Meeting Send to OneNote OneNote Contact Attendees Attendees Busy 15 minutes Recurrence Categorise Tags Dictate Voice All Apps Apps Immersive Reader Immersive Tractivity Add-in Group Add a Zoom Meeting Zoom Settings Viva Insights Add-in View Template

Kate Martin X Automatic reply: * Thanks for your email! I am currently off today with limited access to emails. If your query is urgent please reach out to customersuccess@tractivity.co.uk Many Thanks, Kate*
Attendee responses: 6 accepted, 0 tentatively accepted, 0 declined.

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After this meeting, you will need to pop time in your diary to download install and get yourself familiar with using the add-in.

Microsoft Teams meeting

Join on your computer, mobile app or room device
[Click here to join the meeting](#)

Meeting ID: 364 632 467 622

Tractivity

Create Event Activity

Selected Project : Training Project

Complete the required information for new Activity to Tractivity:

Contacts

Select All

☒ Vicky Adamson

☒ Luke Gratton

☒ Kate Martin

☒ Thom Rodgers

Organisations

Select All

Sub Projects

Select All

☐ Consultation D

☒ Consultation A

☐ Consultation B

☐ Consultation C

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.

Tractivity

×

Create Event Activity

BACK

Selected Project : Training Project (Do Not Use)

Complete the required information below to add the new Activity to Tractivity:

Contacts

☐ Select All

☒ Vicky Adamson

Organisations

☐ Select All

Sub Projects

☐ Select All

☒ Consultation D

☐ Consultation A

☐ Consultation B

☐ Consultation C

Enquiries

3

CREATE NEW ENQUIRY

Filter by: Most Recent

2

☐ Enquiry Title

☐ Test Meeting 1

☐ Complaint

☐ Test

☐ Make Notes Confidential?

Only you will be able to view email notes and attachments

1

SAVE

Activities Inside Tractivity

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

- 1. **Outlook Calendar Meeting** is added inside Tractivity 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.

Enquiries: View Enquiry

Add New:

- Add Enquiry Activity

Enquiry:

- View Enquiry

- Edit Enquiry

- Clone Enquiry

- Attach Associated Contacts

- Refer Enquiry

- Reassign Enquiry

- Link Associated Event

- Archive Enquiry

Communicate:

- Email Contact

- Email Enquiry Details

Print:

- Printable Version

Search:

- Enquiries

- Organisations & Contacts

Enquiry Title	Meeting	
Contact Name	Martin, Kate T:07702369850	
Associated Organisation		
Sub Projects		
Consultation Phase		
Enquiry Status	Live - 07/11/2023	
Enquiry Stage		
Enquiry Priority		
Enquiry Received	07/11/2023	
Account Handler	Adamson, Vicky	

Add Email

Drag an email here
or click to select

Full Details

Activities (2)

Activity Attachments (5)

Issues (0)

Associated Contacts (3)

Filter by Activity Types:

Select options

PREVIEW ACTIVITIES

Date	Activity/Action	Title	Status	Issues	Edit	Delete
21/11/2023	Event	Outlook Add In - Demo			Edit	Delete
25/10/2023	Email Received	Hello! Outlook Test			Edit	Delete

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



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