System Admin Module - Editing and emailing subscription preferences

System Admin Menu

If you are a **Superuser**, you will be able to access the **System Admin** area of Tractivity through your normal login.

1. To access System Admin; at the very top of your Tractivity page. Please click into 'System Admin'.

2. Once within System Admin; you can find the menu on the left hand side.

3. To access any areas of System Admin, click the red link of the option you wish to edit/view or amend.

Tractivity®

System Admin | Help Center | Archive | My Settings | Log-out

Logged-in as: Dan Page | Last log-in: 14:11 on 27/10/2023

You are currently viewing: Training

HOME	CALENDAR	BUILDINGS	ORGANISATIONS & CONTACTS	ENQUIRIES	ISSUES	STAKEHOLDER MAPPING	STRATEGY PLANS	SURVEYS

LAND PARCELS	LIBRARY	DISTRIBUTION LISTS	EVENTS	EMAIL	MAILSHOTS	REPORTS

System Admin: View Client

Add New:

- Add User

- Add Project

Client:

- View Client

- Edit Client

Communication:

- Send Preferences Email

Stakeholders:

- Import Stakeholders

- Merge Stakeholders

- Share Stakeholders

Configuration:

- Field Configuration

Name	Client Name
Allow Project Tiering?	Yes
Address	Systems House Ashford Road Bakewell Derbyshire DE45 1GT
Multi-Factor Authentication	Optionally apply per user

Users (54)	Projects (41)

Title	Last Access	Account Status	System Admin	Edit	Remove
Adamson, Vicky	26/10/2023	Active	Yes	Edit	Remove

Subscription Preferences Configuration

Within system admin, click into **Subscription Preferences Configuration** on the left hand side menu.

1. You can amend the subscription preferences email **per project** – please ensure you edit/view the project you wish to amend.

2. If you are wishing to send emails out from Tractivity for your stakeholders to update their subscription preferences, you'll need to ensure **allow email send** is ticked.

3. Before making changes to the current configuration, you can **send a test** email in order to view what the current subscription preferences email looks like.

4. To edit or view the current configuration, click into the **edit** option of the project. Within this option you can create your own subscription preferences email and set the standard subscription preference.

System Admin: Subscription Preferences Configuration

Client:
- View Client

Communication:
- Send Preferences Email

Stakeholders:
- Import Stakeholders
- Merge Stakeholders
- Share Stakeholders

Configuration:
- Field Configuration
- Global System Data
- Project System Data
- Email Configuration
- Email Servers
- Subscription Preferences Configuration
- Event Configuration
- External Forms
- Stakeholder Mapping Attributes
- SMS Configuration

Project ①	Allow Email Send? ②	From Email Address	Send Test ③	Edit ④
1. Sandwell Council	☐	Tractivity (mailings@tracmail.co.uk)	Send Test	Edit
2. Hull	☑	Tractivity Team (Enquiries@Tractivity.co.uk)	Send Test	Edit
6.3 Deployment	☑	6.3 Testing (dan.brook@redigitalgroup.com)	Send Test	Edit
AE Test Project	☐	Tractivity (mailings@tracmail.co.uk)	Send Test	Edit
All Fields	☐	Tractivity (mailings@tracmail.co.uk)	Send Test	Edit
BBC	☐	Tractivity (mailings@tracmail.co.uk)	Send Test	Edit
BBC Test	☐	Tractivity (mailings@tracmail.co.uk)	Send Test	Edit
BBC TV Licensing	☐	Tractivity (mailings@tracmail.co.uk)	Send Test	Edit
Caroline	☐	Tractivity (mailings@tracmail.co.uk)	Send Test	Edit
Child Project - Test	☐	Tractivity (mailings@tracmail.co.uk)	Send Test	Edit
Customer Success Team Training	☑	Tractivity Team (Info@tractivity.co.uk)	Send Test	Edit
Dan P Project	☐	Tractivity (mailings@tracmail.co.uk)	Send Test	Edit

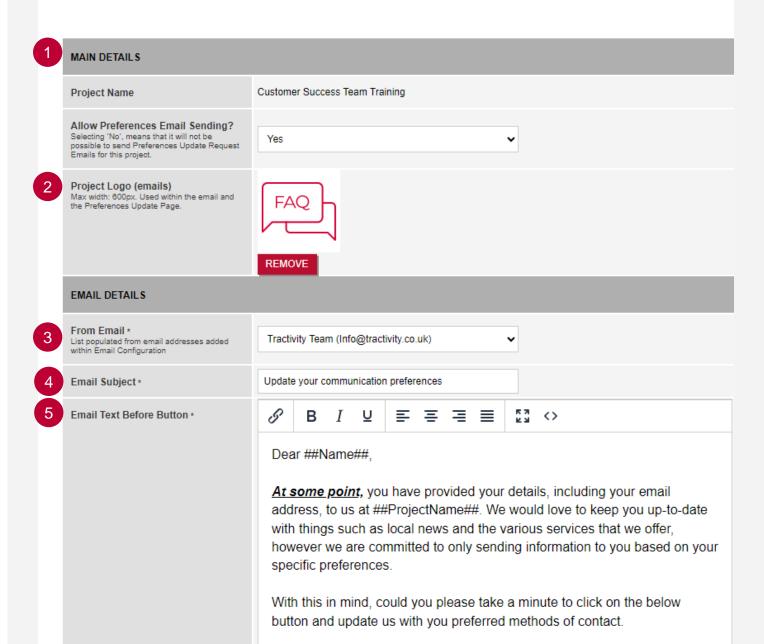# Review current email configuration and editing subscription preference email

Within the edit function; you can tailor the subscription email as you wish. The body of the email has been pre-set, but you can choose to change this.

1. Ensure you are within the **project** you wish to update or send the subscription preferences email for.

2. You can input your **company's logo** into the email and the subscription options page.

3. The **from email** in Tractivity is the email your stakeholders will receive the email from. This should be pre-set, but can you amend this.

4. Please input the email subject line you would like your email to be sent with.

5. The body of the email has already been **pre-made.** if however, you would like to amend this, you can type your own. Remember to leave in the **##Name##** as this will be used to personalise each email to include the stakeholder's first name.

Once completed; you will need to scroll to the bottom of the page and click **save** for it to make any changes.

Edit Project Step 2 - Subscription Preferences

1 MAIN DETAILS

Project Name	Customer Success Team Training
Allow Preferences Email Sending? Selecting 'No', means that it will not be possible to send Preferences Update Request Emails for this project.	Yes

2 Project Logo (emails)
Max width: 600px. Used within the email and the Preferences Update Page.

FAQ

REMOVE

EMAIL DETAILS

3 From Email * List populated from email addresses added within Email Configuration	Tractivity Team (Info@tractivity.co.uk)
4 Email Subject *	Update your communication preferences

5 Email Text Before Button *

Dear ##Name##,

At some point, you have provided your details, including your email address, to us at ##ProjectName##. We would love to keep you up-to-date with things such as local news and the various services that we offer, however we are committed to only sending information to you based on your specific preferences.

With this in mind, could you please take a minute to click on the below button and update us with you preferred methods of contact.

Review current email configuration and editing subscription preference email (continued)
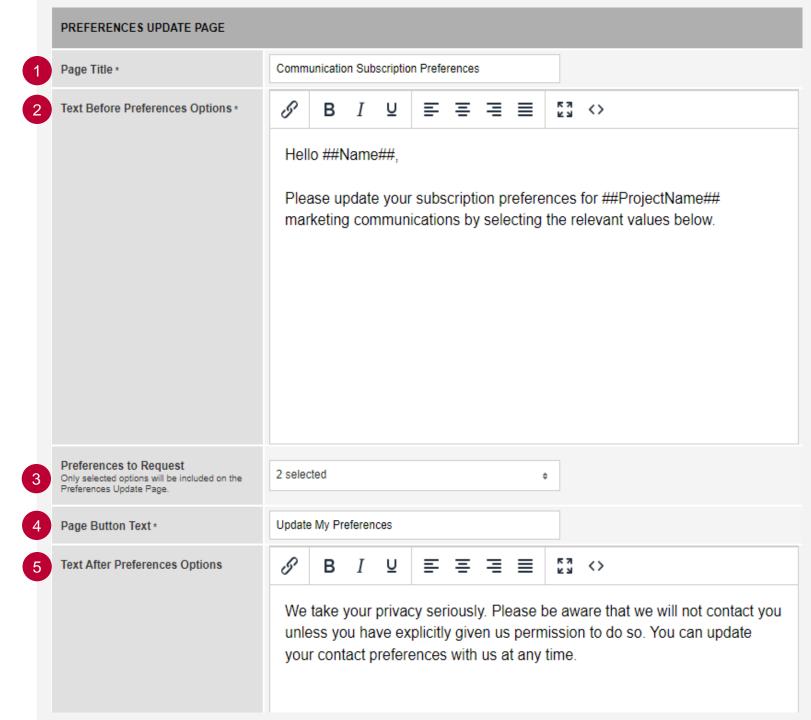
Scrolling down the same page, you can also edit the preferences update page (where your stakeholders confirm their preferences).

This follows the same process as the original email.

1. This is the text that appears on the title of the preferences update page.

2. The body of the text has been pre-made but you can choose to amend this. Remember to leave in the **##Name##** as this will be used to personalise each email to include the stakeholder's first name.

3. You can pick and choose which preferences you are requesting your stakeholders to confirm/update.

4. Type the text you wish to be displayed inside the button.

5. You can also choose the text that follows the preferences options

Once completed; you will need to scroll to the bottom of the page and click **save** for it to make any changes.

It would be advisable to send a **test** email so you can review the changes you have made.

PREFERENCES UPDATE PAGE

1 Page Title *

Communication Subscription Preferences

2 Text Before Preferences Options *

Hello ##Name##,

Please update your subscription preferences for ##ProjectName## marketing communications by selecting the relevant values below.

3 Preferences to Request
Only selected options will be included on the Preferences Update Page.

2 selected

4 Page Button Text *

Update My Preferences

5 Text After Preferences Options

We take your privacy seriously. Please be aware that we will not contact you unless you have explicitly given us permission to do so. You can update your contact preferences with us at any time.

Editing subscription preference defaults

Within the same page, you can edit your organisation and contact subscription defaults for all your stakeholders on particular projects.

You can mass subscribed or un-subscribe – depending on your preference and GDPR protocols.

1. Select either **subscribed** or **no response** as your default.

2. If you selected subscribed; select the **reason** your stakeholder has provided or whether it is via legitimate interest.

3. Once you have made any changes, scroll to the bottom of the page and click **save**. No changes will be made unless this has been clicked.

ORGANISATION SUBSCRIPTION PREFERENCE DEFAULTS

Please note: These default preferences will be set against any new organisations added to Tractivity.

Mailshot Communications	Subscribed ⌄	Via	Legitimate Interest ⌄
Postal Communications	Subscribed ⌄	Via	Legitimate Interest ⌄
Telephone Communications	Subscribed ⌄	Via	Legitimate Interest ⌄
SMS Communications	Subscribed ⌄	Via	Legitimate Interest ⌄

CONTACT SUBSCRIPTION PREFERENCE DEFAULTS

Please note: These default preferences will be set against any new Contacts added to Tractivity.

Mailshot Communications	Subscribed ⌄	Via	Legitimate Interest ⌄
Postal Communications	Subscribed ⌄	Via	Legitimate Interest ⌄
Event Communications	Subscribed ⌄	Via	Legitimate Interest ⌄
Telephone Communications	Subscribed ⌄	Via	Legitimate Interest ⌄
SMS Communications	Subscribed ⌄	Via	Legitimate Interest ⌄

SAVE   CANCEL

How to Send Preferences Email

If you are a superuser in Tractivity, you will be able to send a preference email to all your eligible stakeholders.

Once you are happy with the layout and configuration of your email, you can send this email via:

1. Heading into the **system admin** section found at the top of your account. (superusers only)

2. Under communication on the left-hand side menu, clicking into **send preferences email**.

How to Send Preferences Email (Continued)

Before sending a subscription preferences email, you need to ensure you are in the correct project and to review your available/unavailable recipients.

1. Select the **project** from your project list that you wish to send the email too.

2. Review the list of **available** recipients that will be receiving this email.

3. Review the list of **unavailable** recipients that won't be receiving this email.

If you need to change any of the unavailable recipients, you will need to **edit** their email or subscription preferences from inside their page in the **organisation** and **contacts** module.

System Admin: Send Preferences Email

Client:

- View Client

Projects — (1) — Customer Success Team Training

Communication:

- Send Preferences Email

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- Subscription Preferences Configuration
- Event Configuration

(2) Available Recipients (42)   (3) Unavailable Recipients (0)

Please see below a list of all Contacts and Companies with valid email addresses that **have not** received this email within the last 12 months. All of these addresses will receive an email.

Type	ID	Name	EmailAddress	Date Last Sent
Contact	3432	Adams, Jenny	jenny.adams@noemail.co.uk	
Contact	66	Adams, Sarah	sarah.adams@trac.com	
Contact	36	Adamson, Victoria	victoria.adamson@tractivity.co.uk	
Contact	5559	Adamson, Victoria	vicky.adamson@tractivity.co.uk	
Organisation	1602	Amazon UK	admin@amazon.co.uk	

Test Email & Full Send

Once you are ready to send the email preferences email, we recommend sending a test email to yourself to review the email and format as you have configured.

1. Send a test email by clicking **send test**.

2. Configure the test email to ensure yourself or the relevant internal colleague receive the test email by inputting an **email address** and clicking **OK**.

3. Once you have received and reviewed the test email and you are happy to continue. Click **send** and input an email address to which any replies will be received to. Before then clicking **OK** – sending the mass email.

Any responses to the email will update their subscription preferences inside their organisation/contact pages automatically.

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Projects Dan P Project

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- SMS Configuration
- IP Configuration

Available Recipients (3) **Unavailable Recipients (0)**

Please see below a list of all Contacts and Companies with valid email addresses these addresses will receive an email.

Type	ID	Name	E...
Contact	6694	Bloggs, Daniel	da...
Contact	6693	Page, Daniel	da...
Contact	6695	Page, Joe	da...

1 SEND TEST

3 SEND

Send Test

To Name	Dan
To Email	daniel.page@tractivity.co.uk

2 OK   CANCEL

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