



TPTTracker

TARGETED PROFILING

Version 2017.1 - Releasing w/c 29th May

The first phase of the TPTTracker 2017 Upgrade will be released during w/c 29.05.17. Below are details of the changes included. You will know when these have gone live, because they include some changes to the Login Screen.

Version 2017.2 is planned for release at the end of June with yet more improvements to make TPTTracker even easier and more useful – watch this space.

LOGIN SCREEN

There will be no need to select '**Group**', just enter your email and password. TPTTracker will recognise your email address and direct you to the correct site.

We have also added a '**Forgotten your password**' link so you will no longer need to call the Help Desk or your administrator to reset them for you.

Log in for TPTTracker Users

Email

Password

[Forgotten your password](#)

If you click 'Forgotten your password' TPTTracker will send an automated email to:

EITHER You

with a link to follow which will allow you to reset your password.

OR Your local Password Administrator(s)

which will allow them to reset your password for you.

Your site administrator will decide which of these options they want and this will then apply to all users of your TPTTracker site. A similar facility has also been added for **Forgotten your passphrase**.

PERSONAL DETAILS SCREEN (PROFILES > PEOPLE > VIEW > PERSONAL DETAILS)

We have revised the layout and increased the functionality of this screen:

Miss A Barnes, 17 Ling Crescent, NS3 4XX Help

Personal details | Alternative contact | Profile | Activities | Communications | Groups | Support | Documents | History

Details

Personal reference: TEN1687

Title: Miss

First name: A

Surname: Barnes

Info! Use the 'Alternative contact' to communicate with this person

Household Status: Not known [View Household](#)

Address

Address line 1: 17 Ling Crescent

Address line 2:

Address line 3: Townsville

Address line 4:

Postcode: NS3 4XX

Property Ref.: no-ref24

Filters

Tenancy Type: Non resident

Landlord: Accent

Division: Nene

Area: Area 3

Local Authority: Not known

Membership No.:

Notes

Contact Details

Telephone 1: 01733 262002

Telephone 2:

Email: a@yacoo.coz.ukx

Record Details

Start Date:

Archived Date:

DELETE RECORD

Participation Summary

Linked to 0 activity groups

0 Activity records and 0.0 Participation hours in last 12 months

Last participation -

Last communication 13/03/2017

Custom personal details

Property required: Not specified

No. Bedrooms required:

Moving date:

Notes:

Funds available:

[Save Changes](#)

[Export Record](#) [Export Tab](#)

Details


Personal reference: TEN1576

Title: Mr

First name: A

Surname: Bull

Household Status: Not known

 View Household

HOUSEHOLD STATUS HAS MOVED

We have moved the **Household Status** field and the **View Household** button into the **Details** panel, under the Personal reference, Title, First name and Surname fields.

(The Household Status field and View Household button will only show if the Profiles>Household tab is active for your TPTTracker site).

Address

Address line 1: 30 Friendly Road

Address line 2:

Address line 3: Townsville

Address line 4: Northshire

Postcode: NS2 1CV

Property Ref.: A125031

PROPERTY REFERENCE HAS MOVED

The **Property ref.** field is now in the Address panel below the Postcode field.

Filters

Tenancy Type: Lease holder

Landlord: Arena

Division: Nene

Area: Area 3

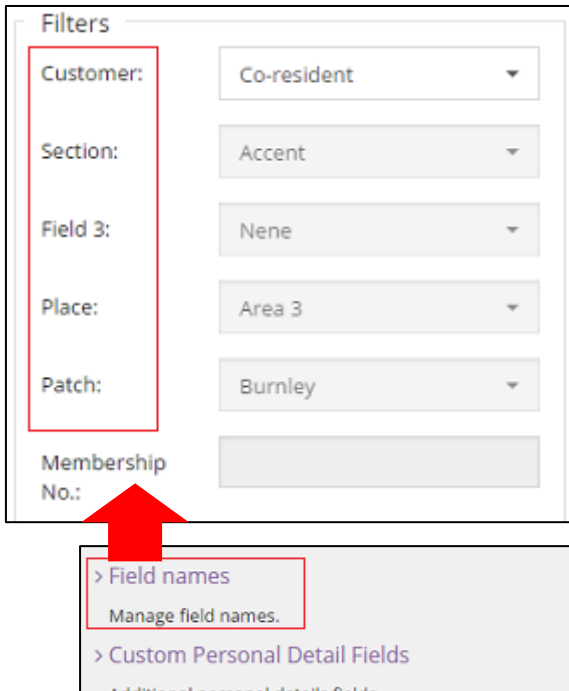
Local Authority: Bradford

Membership No.:

PROPERTY DETAILS RENAMED 'FILTERS'

The **Property details** panel has been renamed **Filters** and now includes the **Membership No.** field

(The Membership No. field will only show if the Membership tab is active for your TPTTracker site).



PROPERTY DETAILS FIELDS CAN BE RENAMED

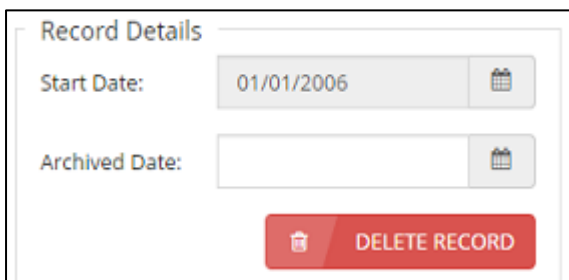
You can now **rename** the Tenancy type, Landlord, Division, Area or Local Authority fields.

This means you can change the names of these fields to reflect the terminology you use elsewhere in your organisation.

Or you can now use these fields for entirely different purposes if you wish.

Go to **Profiles>Setup>Field names** to amend the names of these fields.

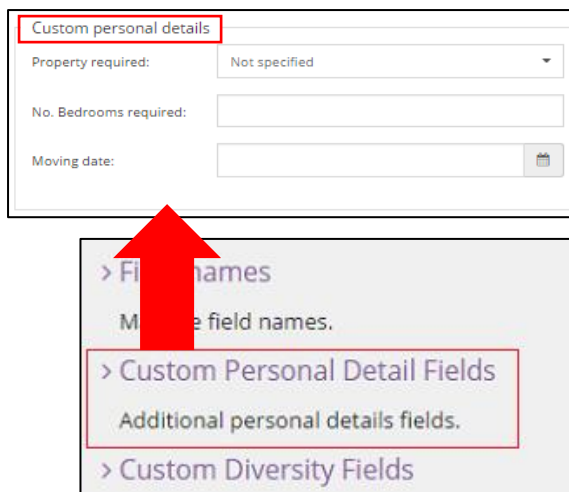
(Access is restricted to Administrators only).



RECORDS CAN NOW BE DELETED

If you have the necessary authorisation, you will see a **Delete record** button in the **Record details** panel. This allows you to delete a person’s record, not just to archive them.

(If you do not have authorisation to delete records you will not see this button).



YOU CAN NOW ADD CUSTOM FIELDS HERE

You can now add your own **custom profiling fields** to this screen so that key information will be instantly visible on the first tab.

These custom fields can be in any format: Text field, Date field, Tick box or Multi-selection dropdown list or Single-selection dropdown list.

You can use these fields for whatever you wish.

Go to **Profiles>Setup>Custom personal details** to create these fields (access is restricted to Administrators only).

PROFILES AND REPORTS SCREEN (PROFILES > PROFILES AND REPORTS)

Personal Details Hide ▲

Address

Address Postcode

Filters

Tenancy Type Landlord Division

Area Local Authority

Record Details

Start Date End Date

Custom personal details

Property required: Notes:

No. Bedrooms required: Funds available:

Moving date:

In the **Personal details** section, any Custom personal details fields you create will be available for use as filters.

The Personal Details section will reflect the changes to the Personal Details screen in Profiles>People>View, including any **Custom personal details** fields.

ADD A PERSON (PROFILES > ADD A PERSON)

Details Personal reference: <input type="text"/> Title: <input type="text" value="Not known"/> First name: <input type="text"/> Surname: <input type="text"/>	Address Address line 1: <input type="text"/> Address line 2: <input type="text"/> Address line 3: <input type="text"/> Address line 4: <input type="text"/> Postcode: <input type="text"/> Property Ref.: <input type="text"/>	Filters Tenancy Type: <input type="text" value="Not known"/> Landlord: <input type="text" value="Not known"/> Division: <input type="text" value="Not known"/> Area: <input type="text" value="Not known"/> Local Authority: <input type="text" value="Not known"/>
Notes <input type="text"/>	Contact Details Telephone 1: <input type="text"/> Telephone 2: <input type="text"/> Email: <input type="text"/>	Record Details Start Date: <input type="text"/> <input type="button" value="Calendar"/> Archived Date: <input type="text"/> <input type="button" value="Calendar"/>
Custom personal details Property required: <input type="text" value="Not specified"/> Notes: <input type="text"/> No. Bedrooms required: <input type="text"/> Funds available: <input type="checkbox"/> Moving date: <input type="text"/> <input type="button" value="Calendar"/>		
<input type="button" value="Save Record"/>		

The **template** for adding a person to the database has been amended to reflect the changes to the **Personal details** screen in Profiles>People>View.

This includes any **Custom personal details** fields.

The **Alternative contact** tab has been removed.

HELP OR ADVICE

If you would like help with these new features, or advice about how they could be used, get in touch with us on the TPTracker Help Desk.

T: 01603 813932 E: support@arenapartnership.co.uk