

Exporting Organizations

12 Steps [View most recent version](#) 

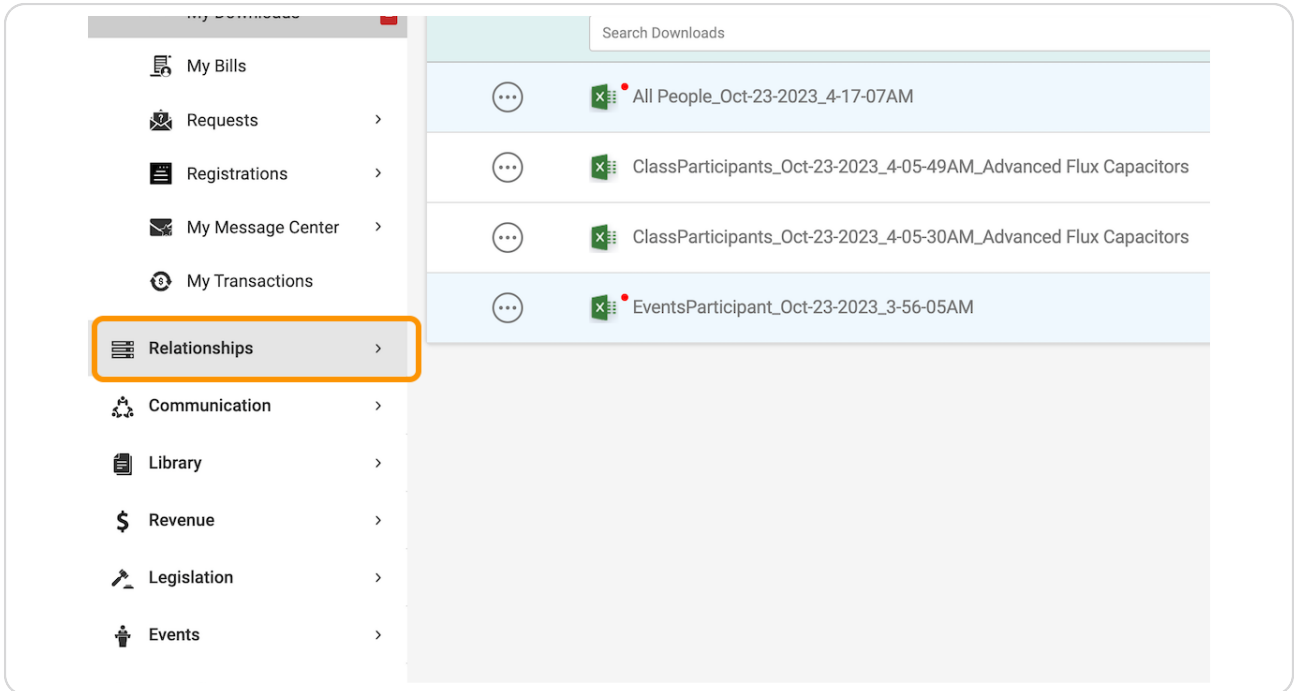
Created by
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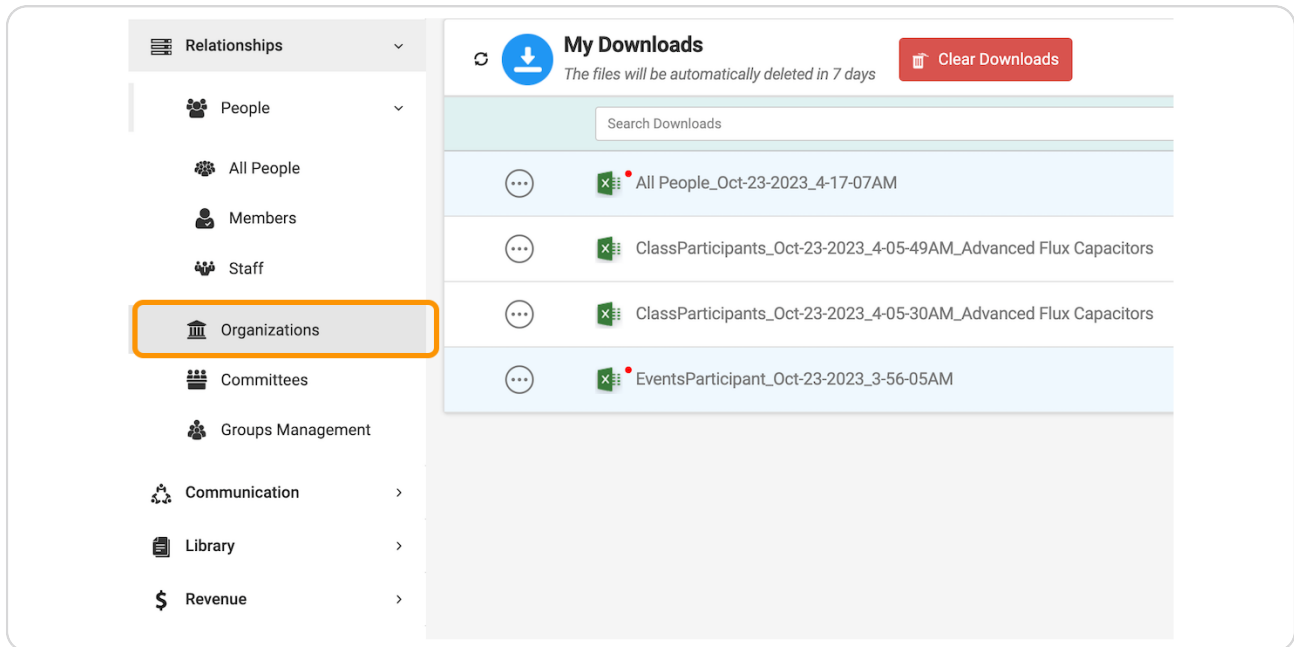
STEP 1

Click on Relationships



STEP 2

Click on Organizations

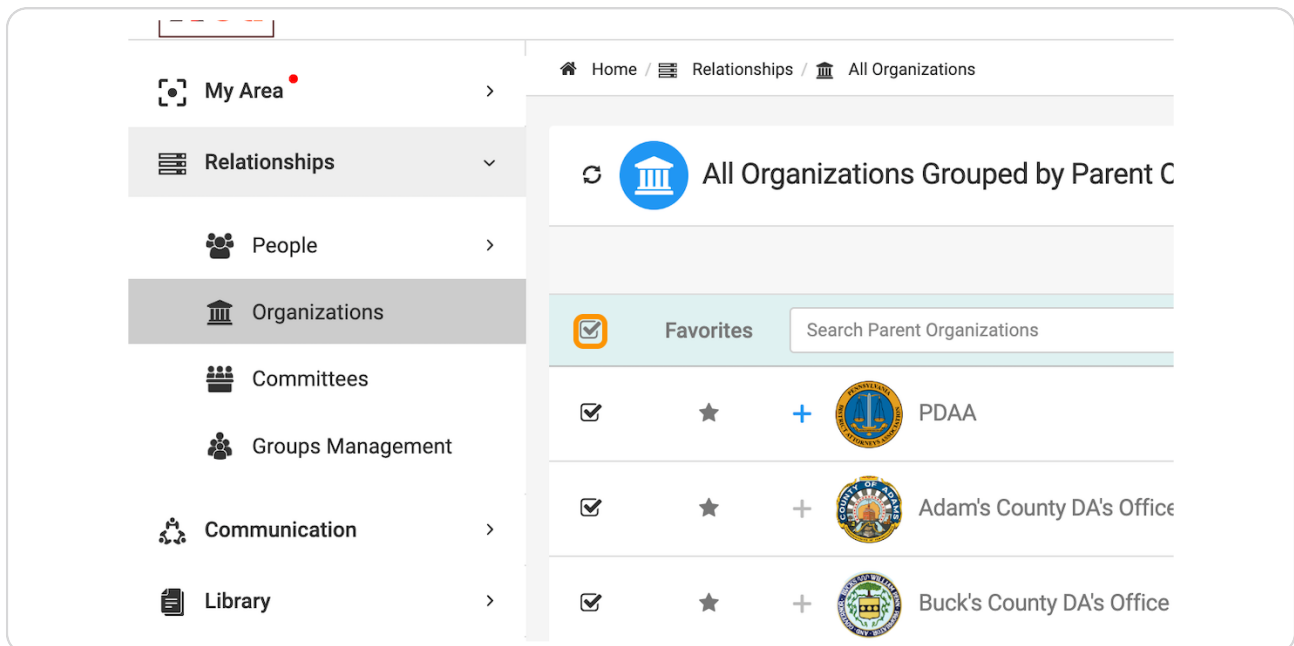


The screenshot shows a sidebar menu on the left with the following items: Relationships, People, All People, Members, Staff, Organizations (highlighted with an orange box), Committees, Groups Management, Communication, Library, and Revenue. The main content area is titled 'My Downloads' and contains a search bar and a list of downloaded files:

- All People_Oct-23-2023_4-17-07AM
- ClassParticipants_Oct-23-2023_4-05-49AM_Advanced Flux Capacitors
- ClassParticipants_Oct-23-2023_4-05-30AM_Advanced Flux Capacitors
- EventsParticipant_Oct-23-2023_3-56-05AM

STEP 3

Check on the tick box to select all the organizations you wish to be in the report

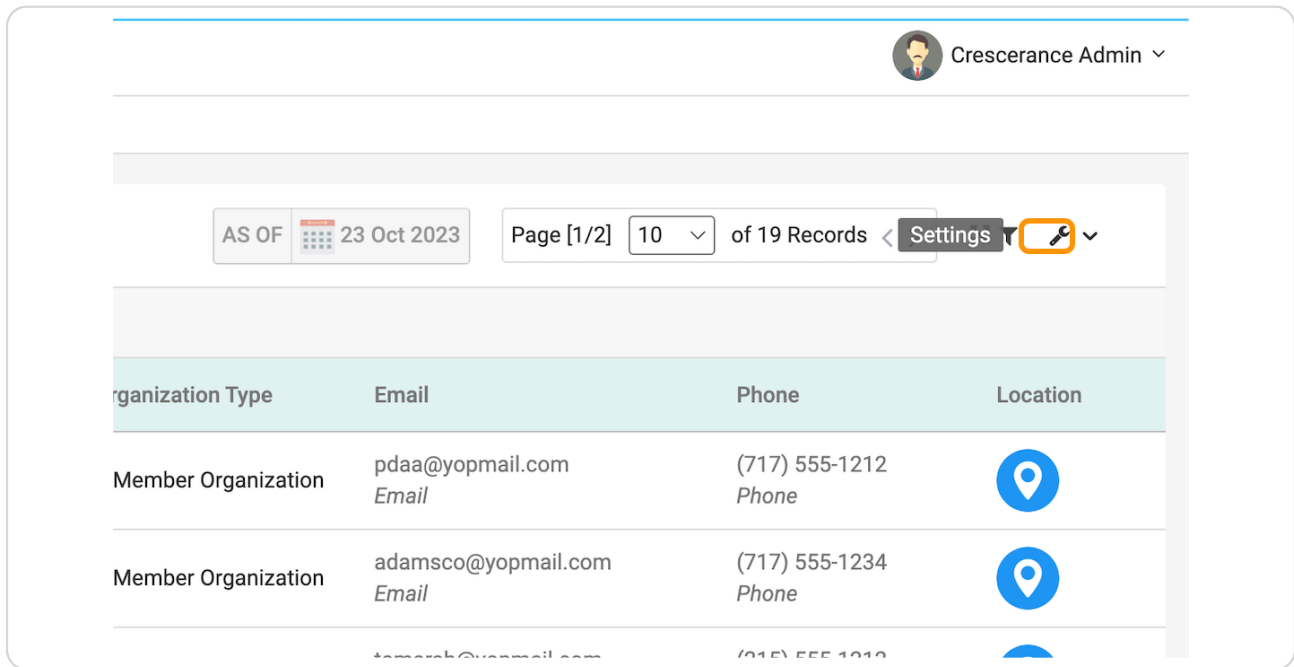


The screenshot shows the 'All Organizations Grouped by Parent C' page. The sidebar menu on the left has 'Organizations' selected. The main content area shows a list of organizations with checkboxes, stars, and plus signs:

Organization	Selected	Star	Plus
PDAA	<input checked="" type="checkbox"/>	★	+
Adam's County DA's Office	<input checked="" type="checkbox"/>	★	+
Buck's County DA's Office	<input checked="" type="checkbox"/>	★	+

STEP 4

Click on Settings

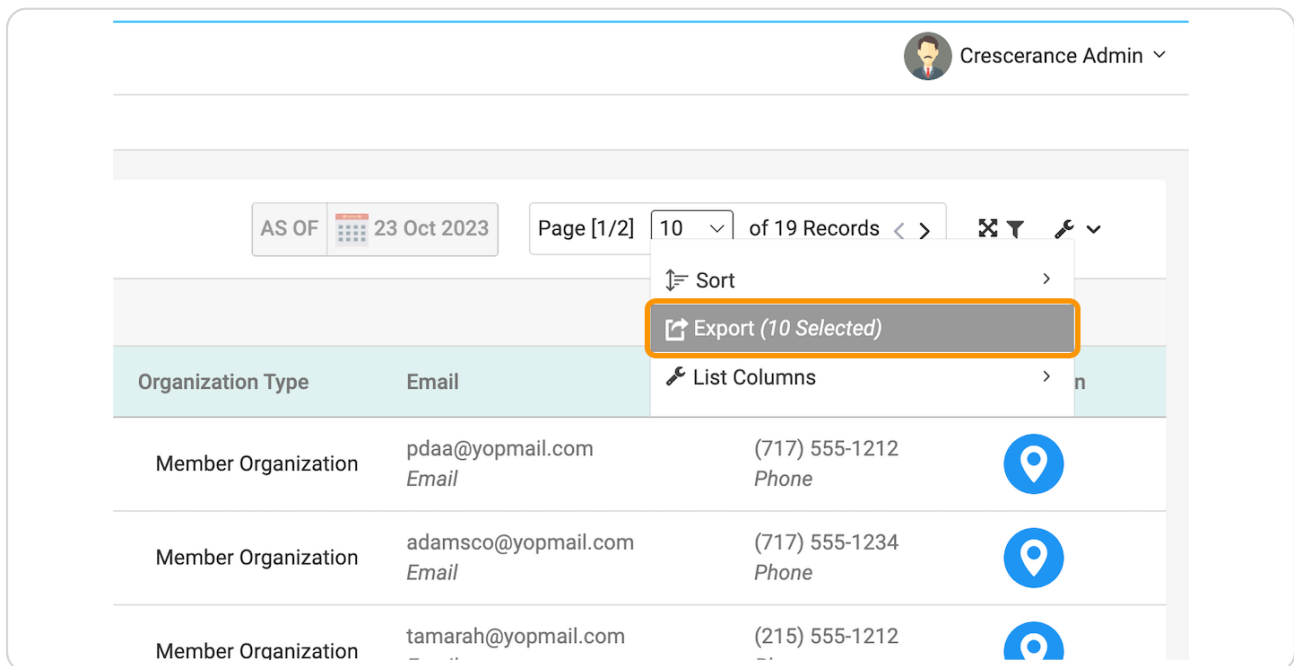


The screenshot shows a user interface for a table of organization records. At the top right, the user is identified as "Crescerance Admin". Below this, there is a control bar with "AS OF" and a calendar icon for "23 Oct 2023", "Page [1/2] 10 of 19 Records", and a "Settings" button with a gear icon, which is highlighted with an orange box. The table below has columns for "Organization Type", "Email", "Phone", and "Location".

Organization Type	Email	Phone	Location
Member Organization	pdaa@yopmail.com <i>Email</i>	(717) 555-1212 <i>Phone</i>	
Member Organization	adamsco@yopmail.com <i>Email</i>	(717) 555-1234 <i>Phone</i>	
Member Organization	tamarah@yopmail.com	(215) 555-1212	

STEP 5

Click on Export



The screenshot shows the same user interface as in Step 4, but with a dropdown menu open from the gear icon. The menu options are "Sort", "Export (10 Selected)", and "List Columns". The "Export (10 Selected)" option is highlighted with an orange box.

Organization Type	Email	Phone	Location
Member Organization	pdaa@yopmail.com <i>Email</i>	(717) 555-1212 <i>Phone</i>	
Member Organization	adamsco@yopmail.com <i>Email</i>	(717) 555-1234 <i>Phone</i>	
Member Organization	tamarah@yopmail.com	(215) 555-1212	

STEP 6

Check on the tick box to include all desired fields on the report

Home / Relationships / All Organizations

All Organizations Grouped

Favorites Search Parent Organization

PDAA

Adam's C

Buck's C

Export Organization List (10 organizations selected)

Select Fields

Organizations (37 fields selected)

General (11 fields selected)

Field

Favorites

Name

STEP 7

Click on Next

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06, 2022 Member Organization

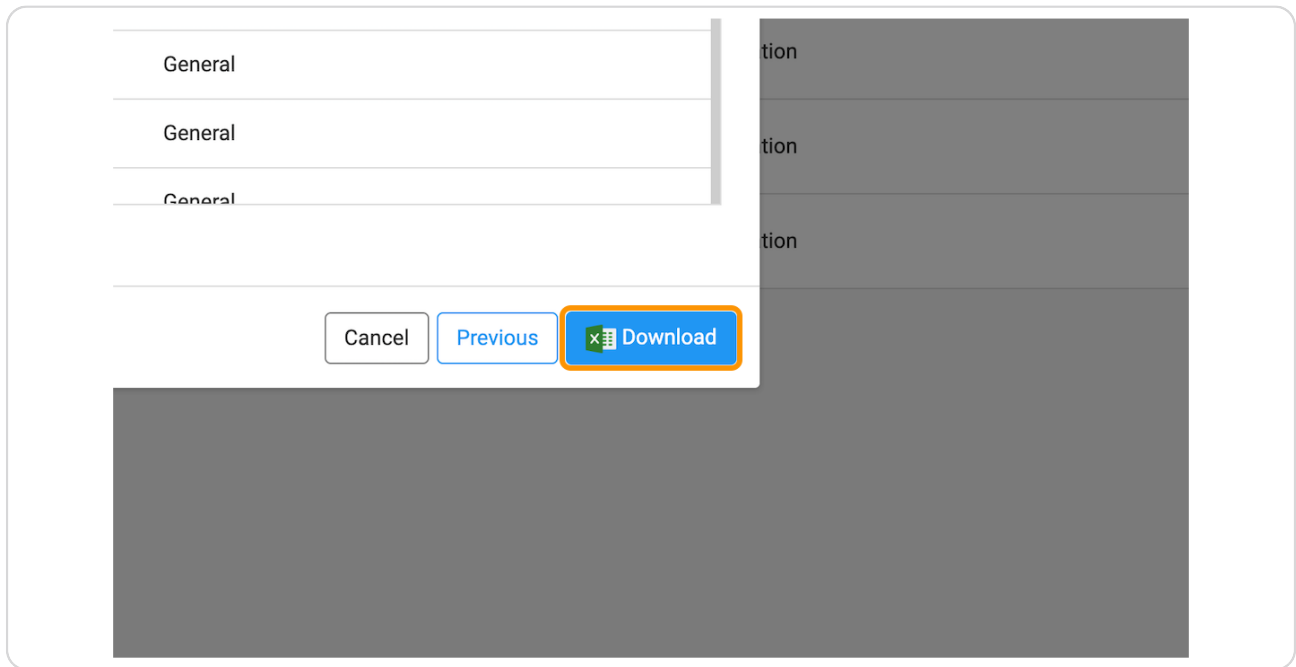
y 18, 2022 Member Organization

1 2 > >>

Cancel Next

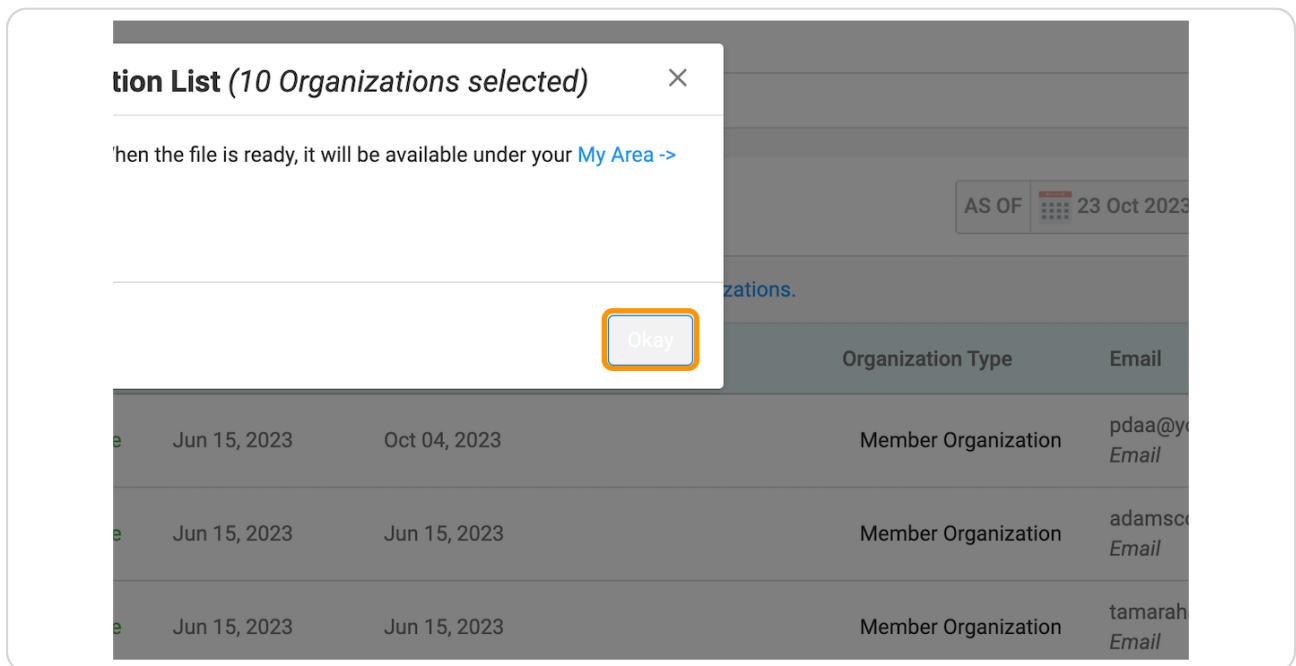
STEP 8

Click on Download



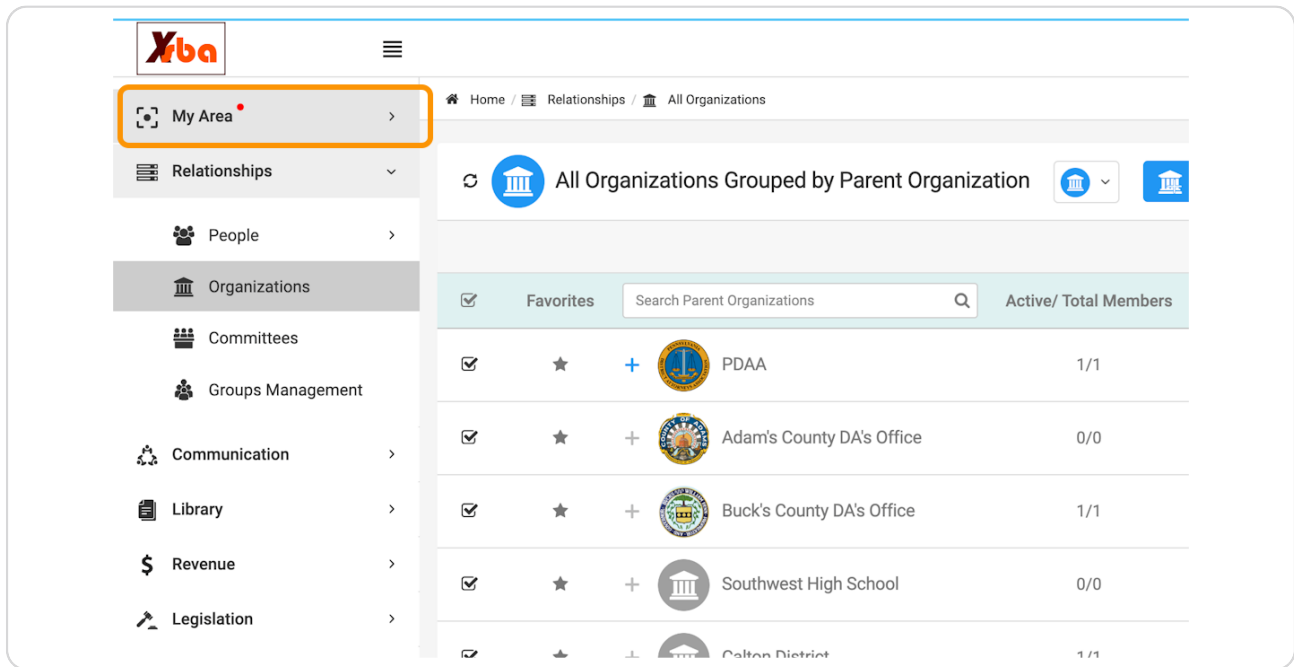
STEP 9

Click on Okay








STEP 10

Click on My Area

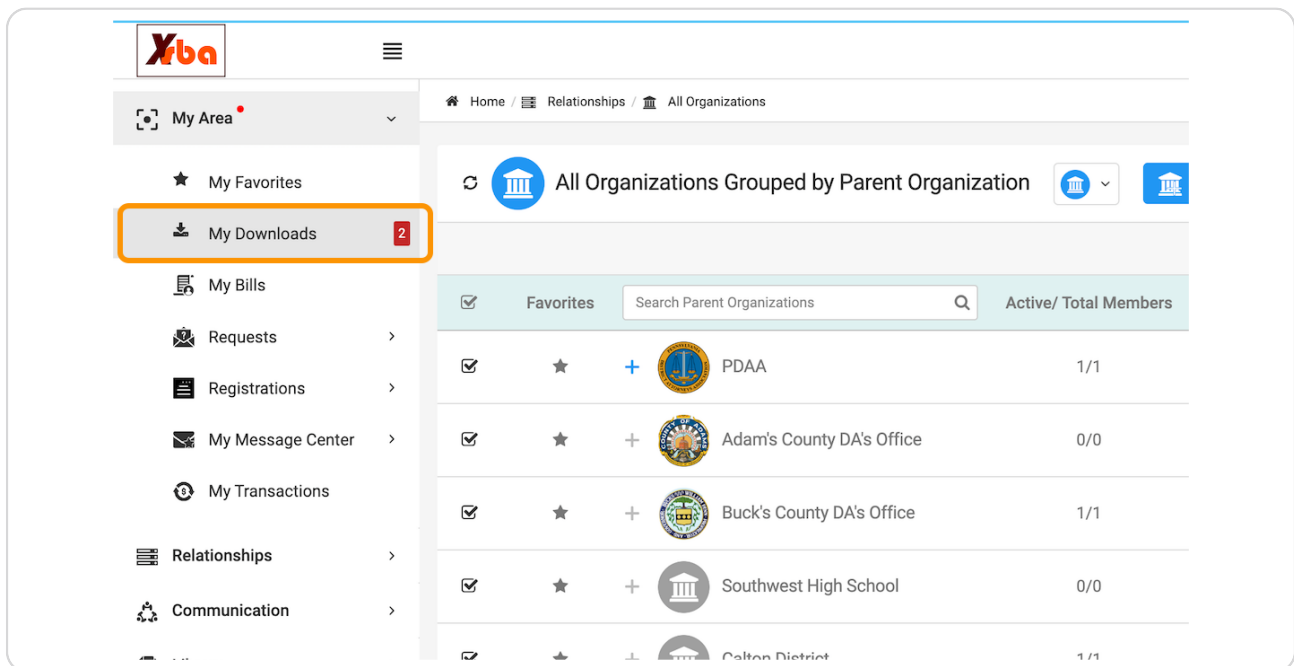


The screenshot shows the Xba website interface. The left sidebar contains a menu with the following items: My Area (highlighted with an orange box), Relationships, People, Organizations, Committees, Groups Management, Communication, Library, Revenue, and Legislation. The main content area displays 'All Organizations Grouped by Parent Organization' with a search bar and a table of organizations.






<input checked="" type="checkbox"/>	Favorites	Search Parent Organizations	Active/ Total Members
<input checked="" type="checkbox"/>	★	+ 	PDAA 1/1
<input checked="" type="checkbox"/>	★	+ 	Adam's County DA's Office 0/0
<input checked="" type="checkbox"/>	★	+ 	Buck's County DA's Office 1/1
<input checked="" type="checkbox"/>	★	+ 	Southwest High School 0/0
<input checked="" type="checkbox"/>	★	+ 	Colton District 1/1

STEP 11

Click on My Downloads...



The screenshot shows the Xba website interface. The left sidebar menu is expanded, showing 'My Downloads' (highlighted with an orange box and a red notification badge with the number 2). Other menu items include My Favorites, My Bills, Requests, Registrations, My Message Center, My Transactions, Relationships, and Communication. The main content area is identical to the previous screenshot, showing 'All Organizations Grouped by Parent Organization'.

<input checked="" type="checkbox"/>	Favorites	Search Parent Organizations	Active/ Total Members
<input checked="" type="checkbox"/>	★	+ 	PDAA 1/1
<input checked="" type="checkbox"/>	★	+ 	Adam's County DA's Office 0/0
<input checked="" type="checkbox"/>	★	+ 	Buck's County DA's Office 1/1
<input checked="" type="checkbox"/>	★	+ 	Southwest High School 0/0
<input checked="" type="checkbox"/>	★	+ 	Colton District 1/1

STEP 12

Click on the button incase you wish to cancel the export

The screenshot displays a user interface with a sidebar on the left and a main content area on the right. The sidebar contains the following items:

- My Area (with a dropdown arrow)
- My Favorites
- My Downloads (highlighted in grey with a red '2' badge)
- My Bills
- Requests (with a right-pointing arrow)
- Registrations (with a right-pointing arrow)
- My Message Center (with a right-pointing arrow)
- My Transactions
- Relationships (with a right-pointing arrow)

The main content area shows the 'My Downloads' section. At the top, there is a breadcrumb trail: Home / My Area / My Downloads. Below this, the 'My Downloads' header includes a refresh icon, a download icon, and the text 'The files will be automatically deleted in 7 days'. A search bar labeled 'Search Downloads' is positioned below the header. The list of downloads includes:

- OrganizationList_Oct-23-2023_4-21-46 (with a three-dot menu icon)
- All People_Oct-23-2023_4-17-07AM (with a three-dot menu icon)
- ClassParticipants_Oct-23-2023_4-05-4 (with a three-dot menu icon)
- ClassParticipants_Oct-23-2023_4-05-4 (with a three-dot menu icon)

