

How to nest organizations

10 Steps [View most recent version](#) 

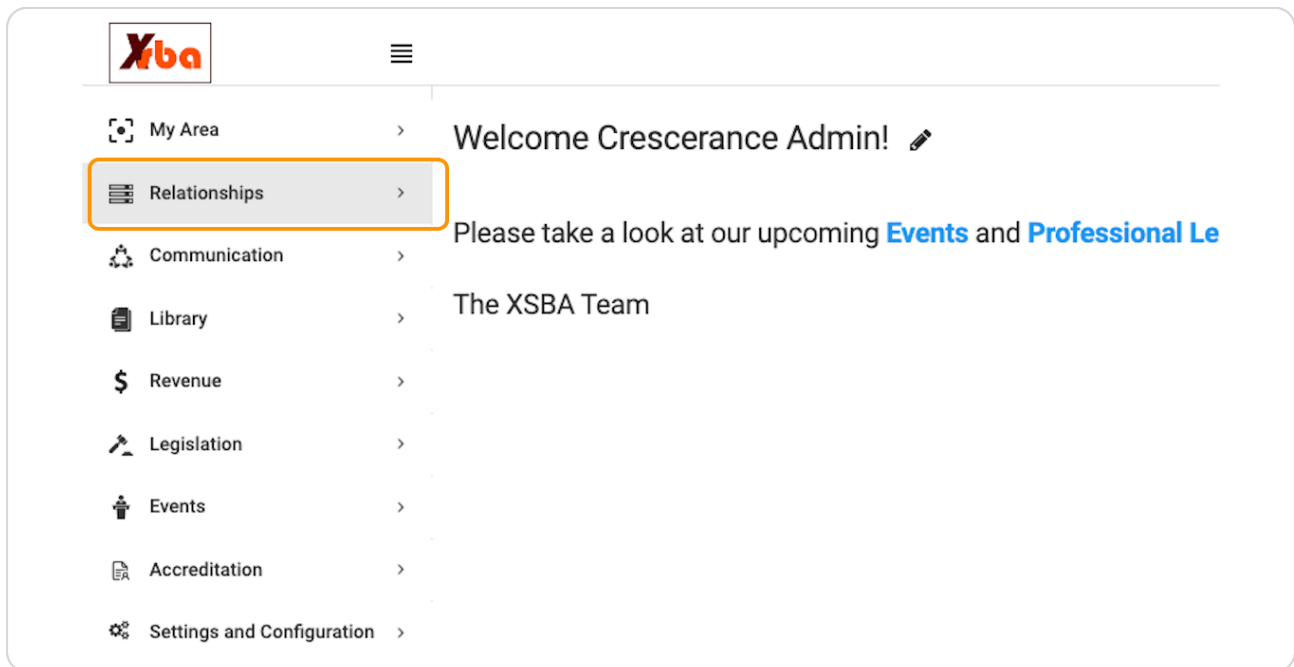
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October 4, 2023

STEP 1

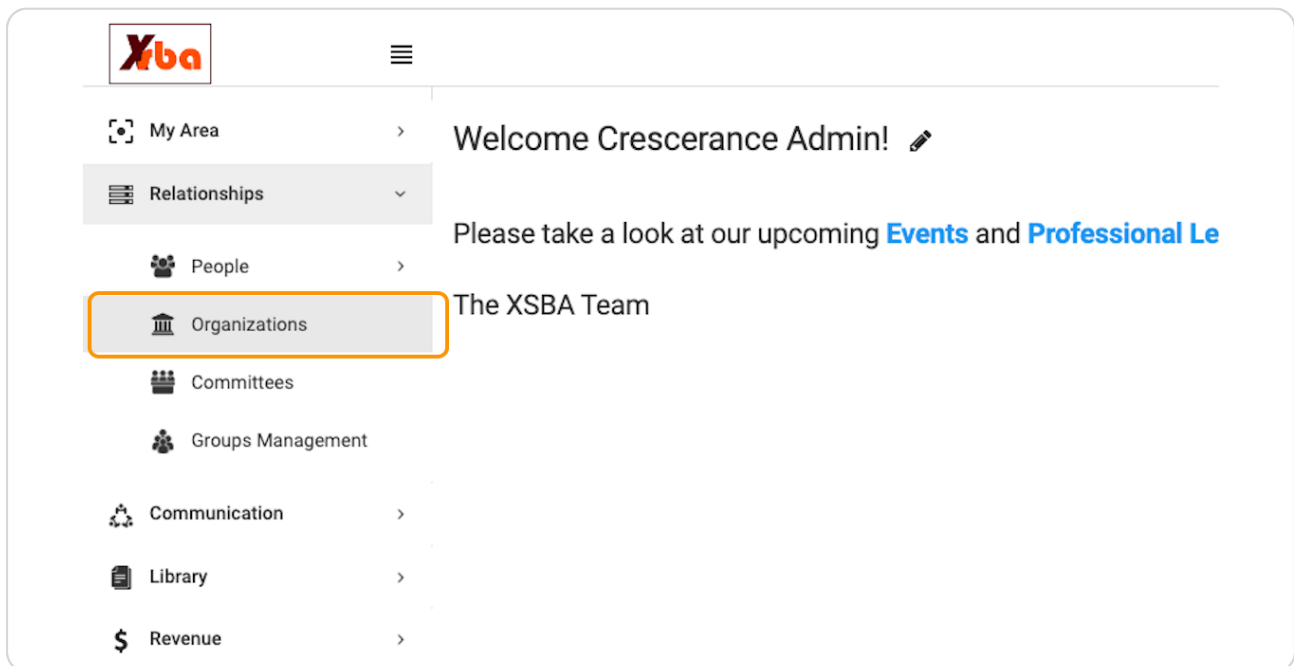
Click on Relationships



The screenshot shows the Xsba admin dashboard. At the top left is the Xsba logo. To its right is a hamburger menu icon. Below the logo and menu is a navigation sidebar with the following items: My Area, Relationships, Communication, Library, Revenue, Legislation, Events, Accreditation, and Settings and Configuration. The Relationships item is highlighted with an orange border. To the right of the sidebar, the main content area displays a welcome message: "Welcome Crescerance Admin!" with an edit icon. Below this, there is a message: "Please take a look at our upcoming [Events](#) and [Professional Le](#)". At the bottom of the main content area, it says "The XSBA Team".

STEP 2

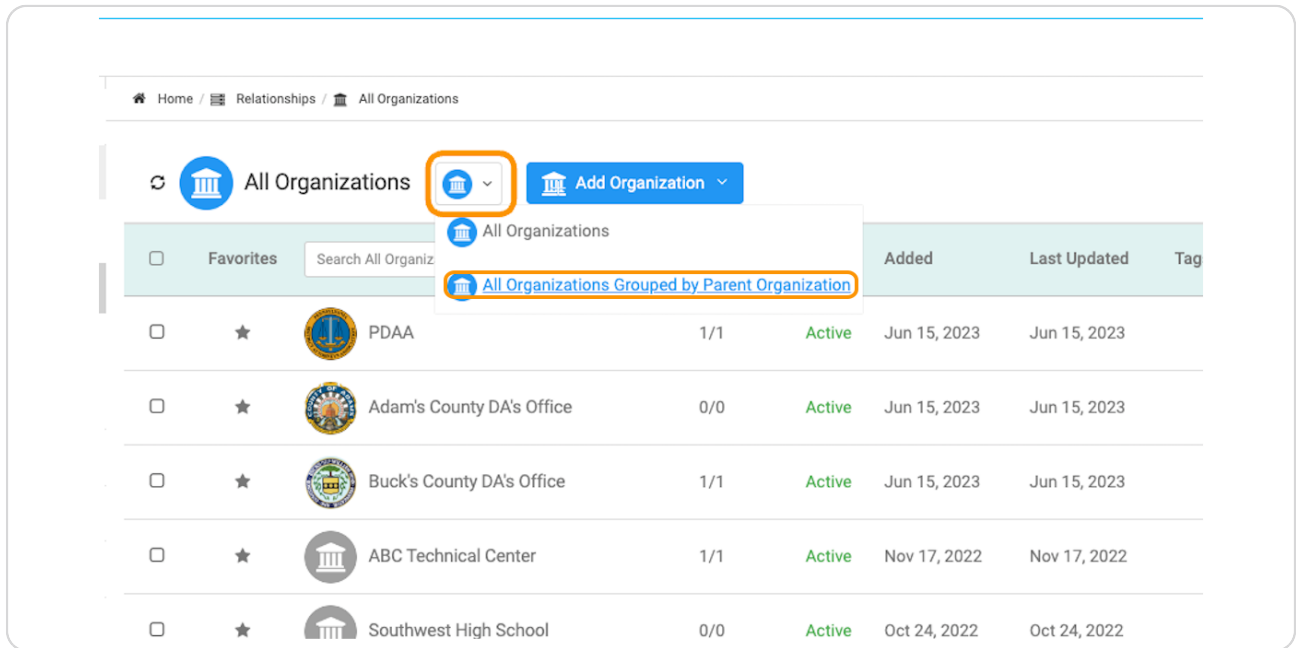
Click on Organizations








The screenshot shows the Xsba admin dashboard with the Relationships menu expanded. The Xsba logo and hamburger menu are at the top left. The navigation sidebar now includes: My Area, Relationships (expanded), People, Organizations, Committees, Groups Management, Communication, Library, and Revenue. The Organizations item is highlighted with an orange border. The main content area on the right shows the same welcome message and links as in Step 1, but the "The XSBA Team" text is now positioned above the Organizations menu item in the sidebar.

STEP 3

Click on organization icon and then click on 'All Organizations Grouped by Parent Organization'

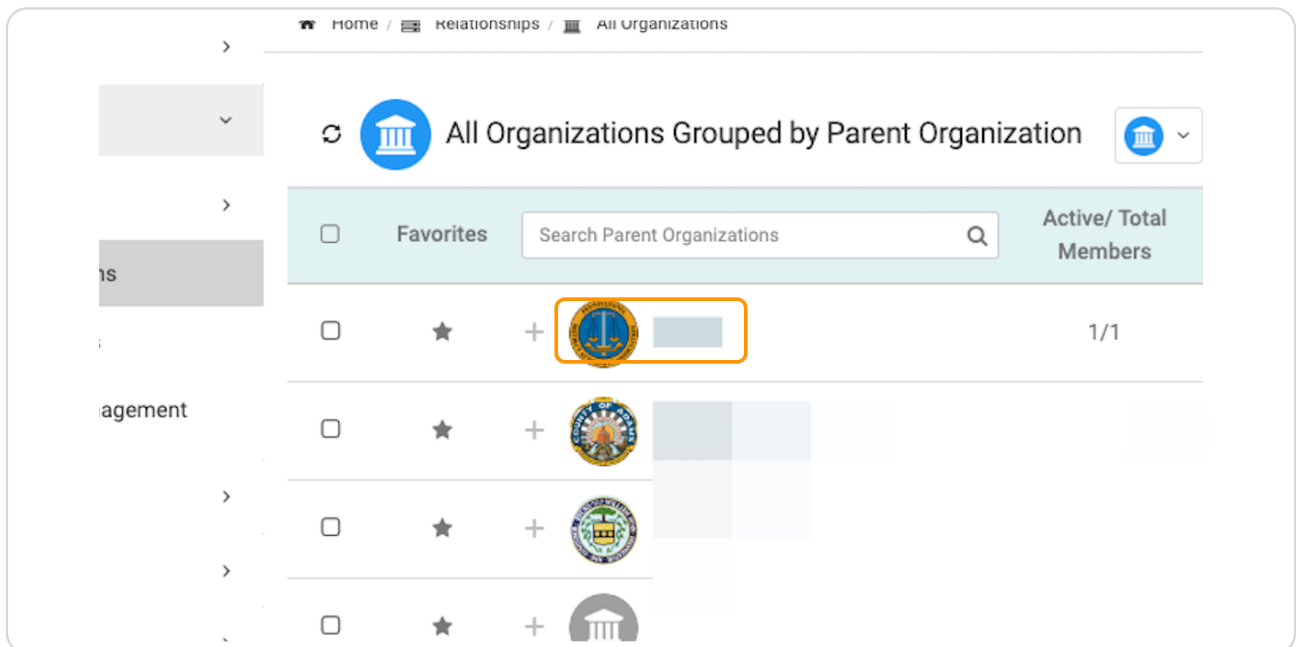


The screenshot shows the 'All Organizations' page. At the top, there is a breadcrumb trail: Home / Relationships / All Organizations. Below this, there is a header area with a refresh icon, a blue circular icon with a building, the text 'All Organizations', a dropdown menu (highlighted with an orange box), and a blue 'Add Organization' button. The dropdown menu is open, showing 'All Organizations' and 'All Organizations Grouped by Parent Organization' (highlighted with an orange box). Below the header is a table with columns: Favorites, Search All Organiz..., Added, Last Updated, and Tag. The table lists several organizations:

	Favorites	Search All Organiz...	Added	Last Updated	Tag	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
<input type="checkbox"/>	<input checked="" type="checkbox"/>	 PDAA	1/1	Active	Jun 15, 2023	Jun 15, 2023
<input type="checkbox"/>	<input checked="" type="checkbox"/>	 Adam's County DA's Office	0/0	Active	Jun 15, 2023	Jun 15, 2023
<input type="checkbox"/>	<input checked="" type="checkbox"/>	 Buck's County DA's Office	1/1	Active	Jun 15, 2023	Jun 15, 2023
<input type="checkbox"/>	<input checked="" type="checkbox"/>	 ABC Technical Center	1/1	Active	Nov 17, 2022	Nov 17, 2022
<input type="checkbox"/>	<input checked="" type="checkbox"/>	 Southwest High School	0/0	Active	Oct 24, 2022	Oct 24, 2022

STEP 4

Click on the preferred parent organization

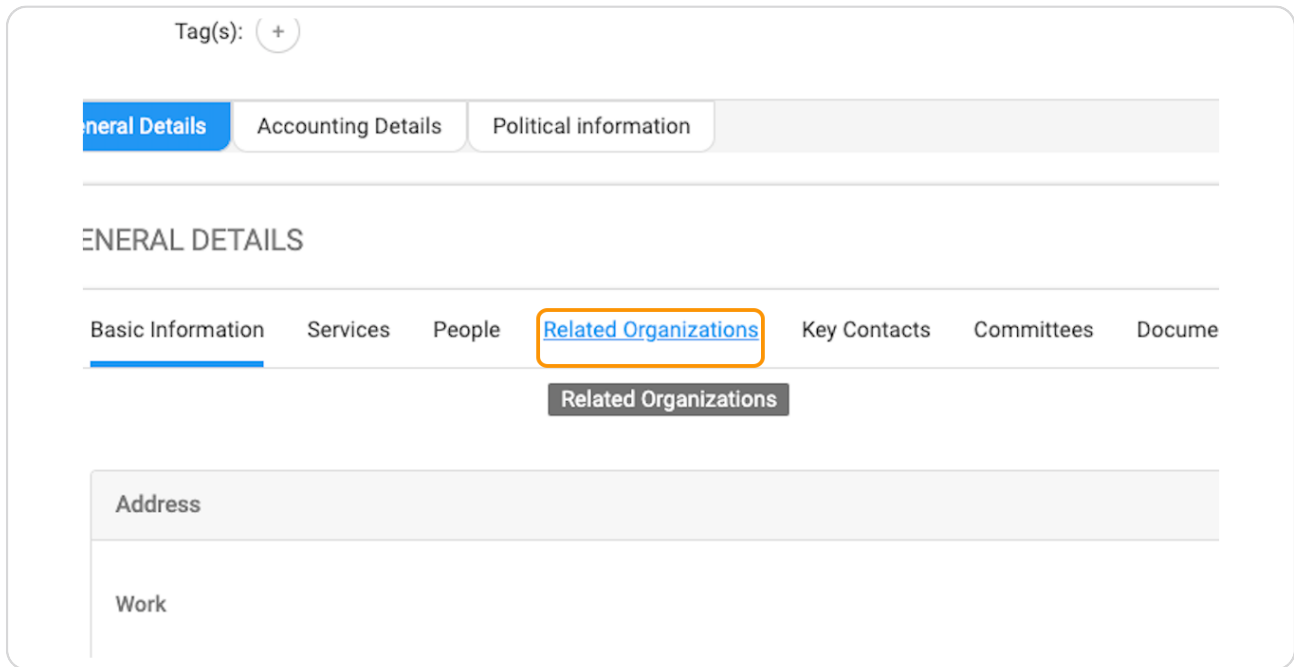


The screenshot shows the 'All Organizations Grouped by Parent Organization' page. At the top, there is a breadcrumb trail: Home / Relationships / All Organizations. Below this, there is a header area with a refresh icon, a blue circular icon with a building, the text 'All Organizations Grouped by Parent Organization', and a dropdown menu (highlighted with an orange box). The dropdown menu is open, showing a parent organization icon (highlighted with an orange box). Below the header is a table with columns: Favorites, Search Parent Organizations, and Active/ Total Members. The table lists several organizations:

	Favorites	Search Parent Organizations	Active/ Total Members
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1/1
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

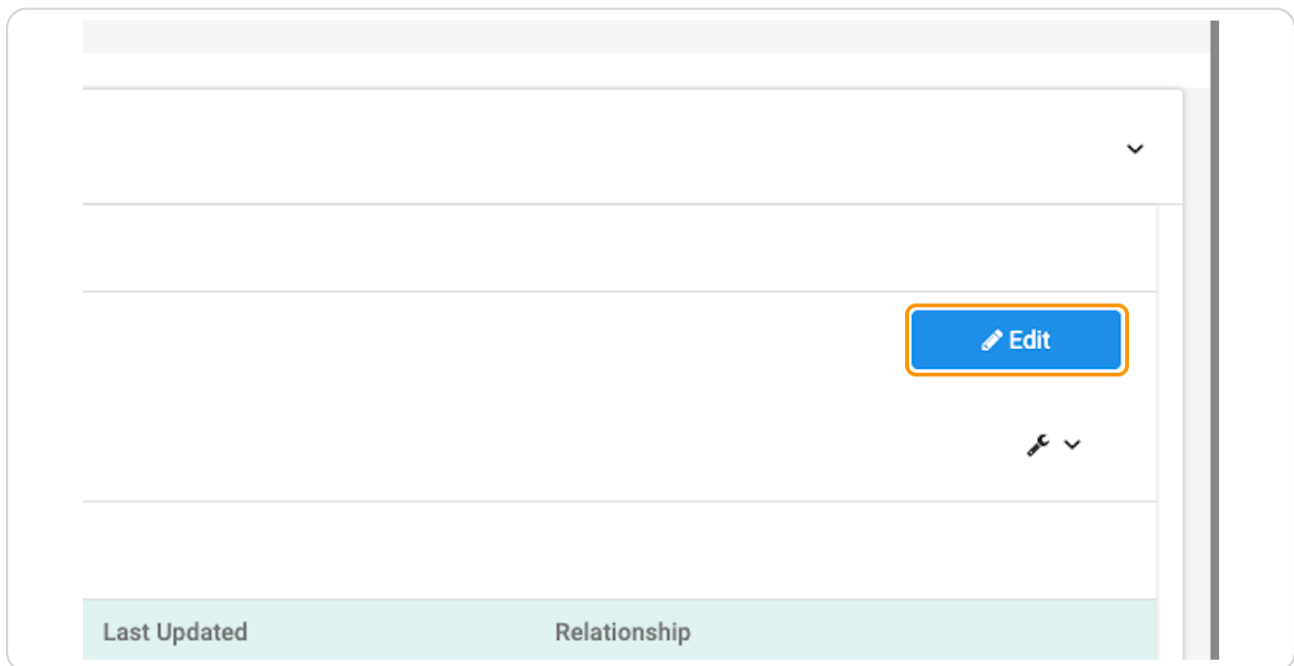
STEP 5

Click on Related Organizations



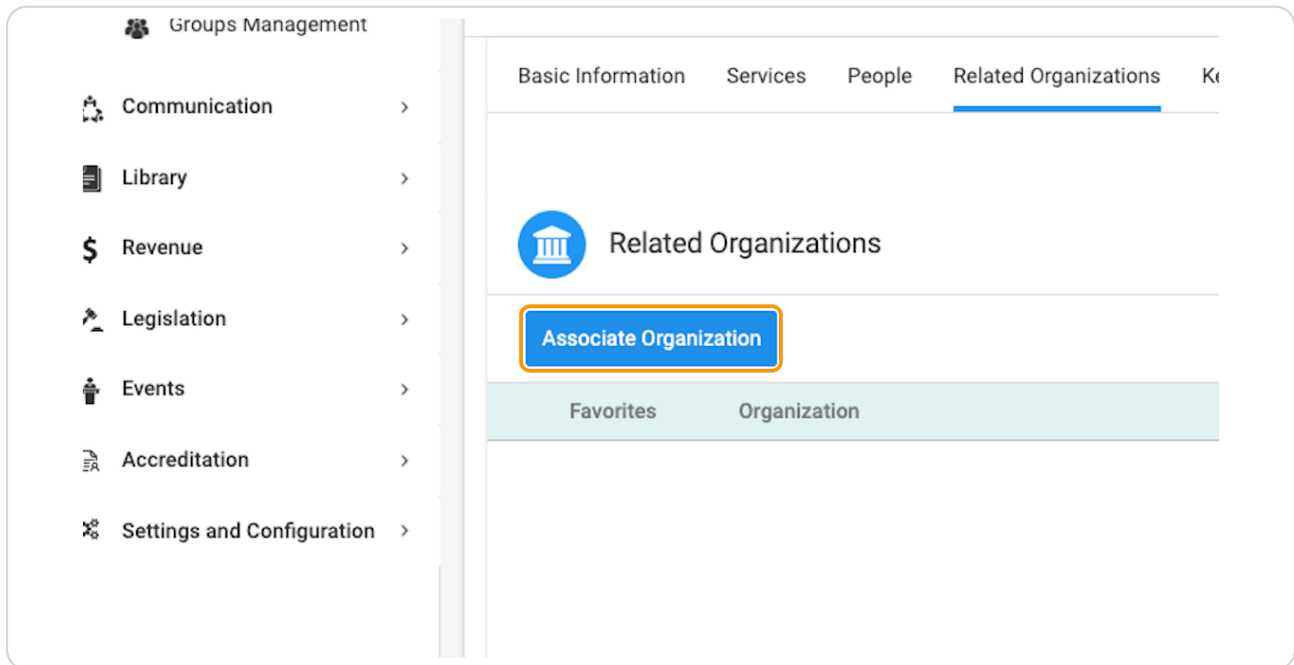
STEP 6

Click on Edit



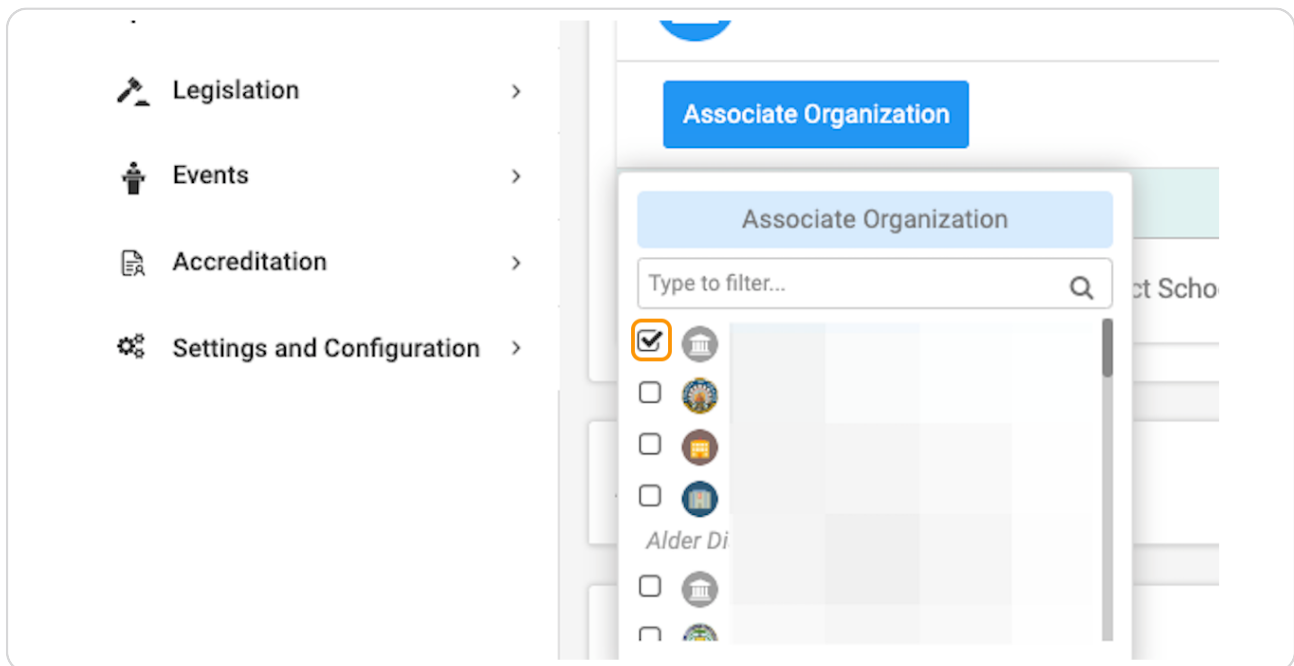
STEP 7

Click on Associate Organization



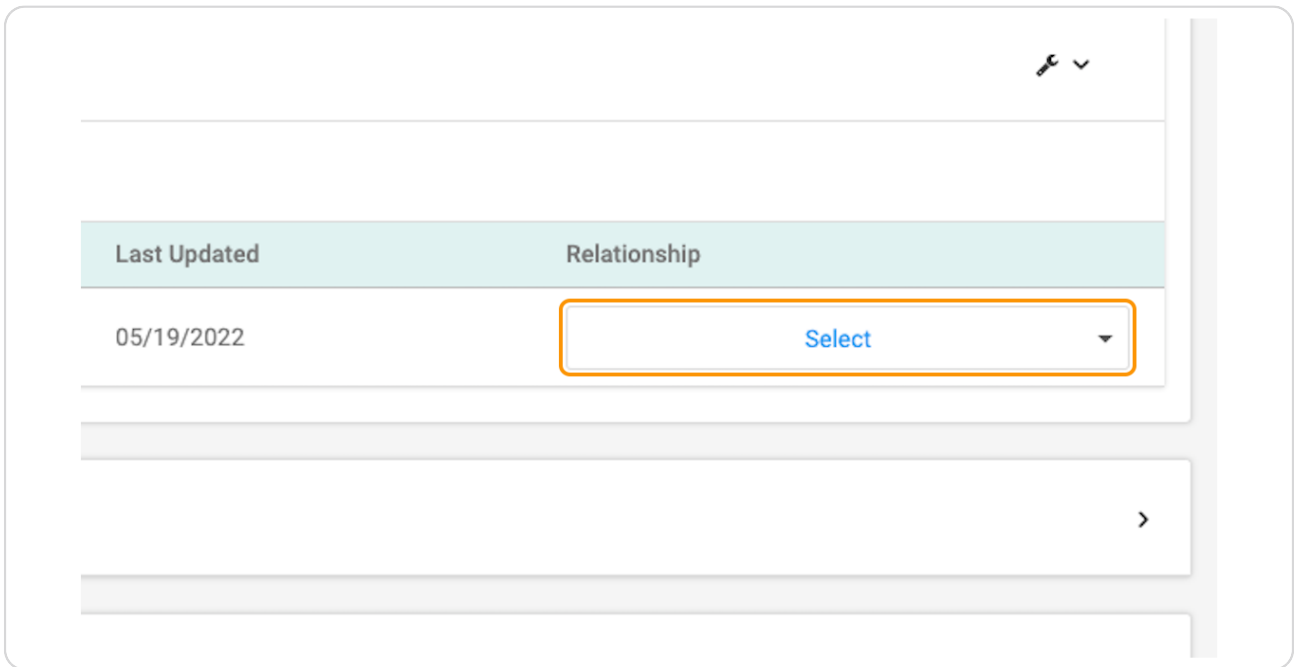
STEP 8

Either type the name of the organization or scroll and then check the box



STEP 9

Click on Select

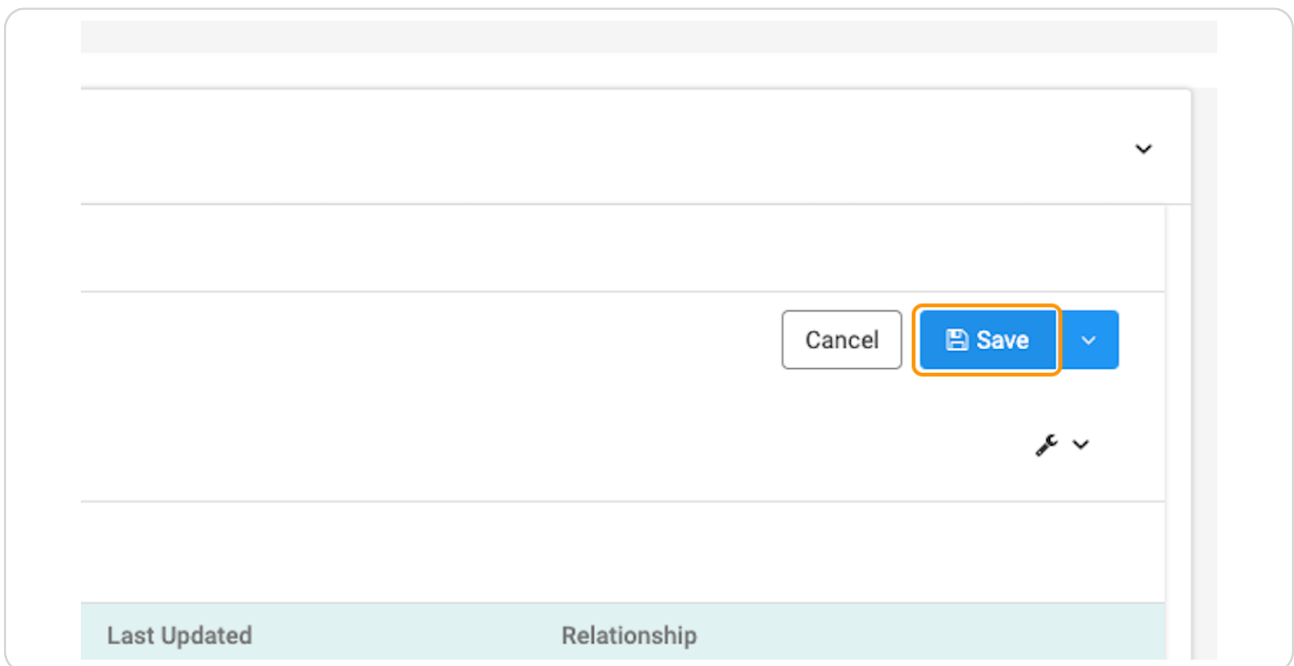


A screenshot of a web interface showing a table with two columns: 'Last Updated' and 'Relationship'. The 'Last Updated' column contains the date '05/19/2022'. The 'Relationship' column contains a dropdown menu with the word 'Select' and a downward arrow. An orange rectangular box highlights the 'Select' button. In the top right corner of the table area, there is a small icon of a wrench and a downward arrow. Below the table, there is a right-pointing arrow icon.

Last Updated	Relationship
05/19/2022	Select

STEP 10

Click on Save



A screenshot of a web interface showing a form with two buttons: 'Cancel' and 'Save'. The 'Save' button is highlighted with an orange rectangular box. The 'Save' button is blue with a white document icon and the word 'Save' in white. Below the buttons, there is a small icon of a wrench and a downward arrow. At the bottom of the form, there is a table with two columns: 'Last Updated' and 'Relationship'.

Cancel Save

Last Updated	Relationship
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