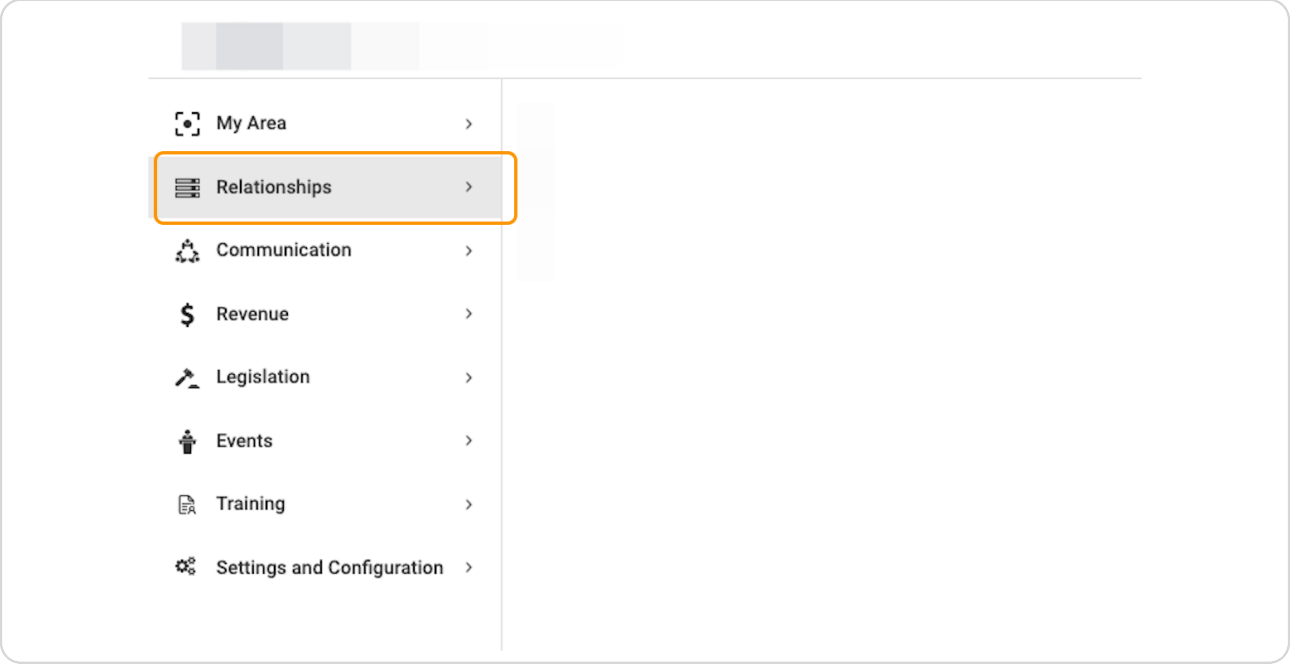
Last Updated Reports - Organizations

25 Steps View most recent version

Created by	Creation Date	Last Updated
Engagifii Inc.	Sep 13, 2024	Sep 13, 2024

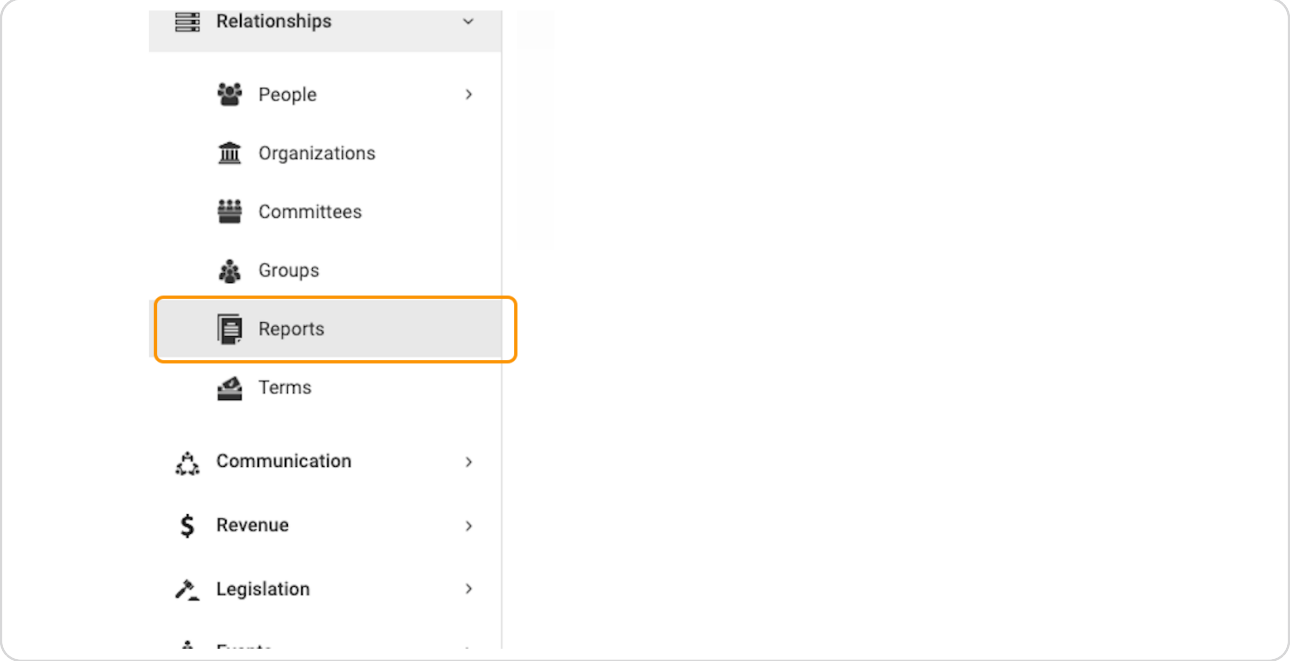
STEP 1

Click on Relationships



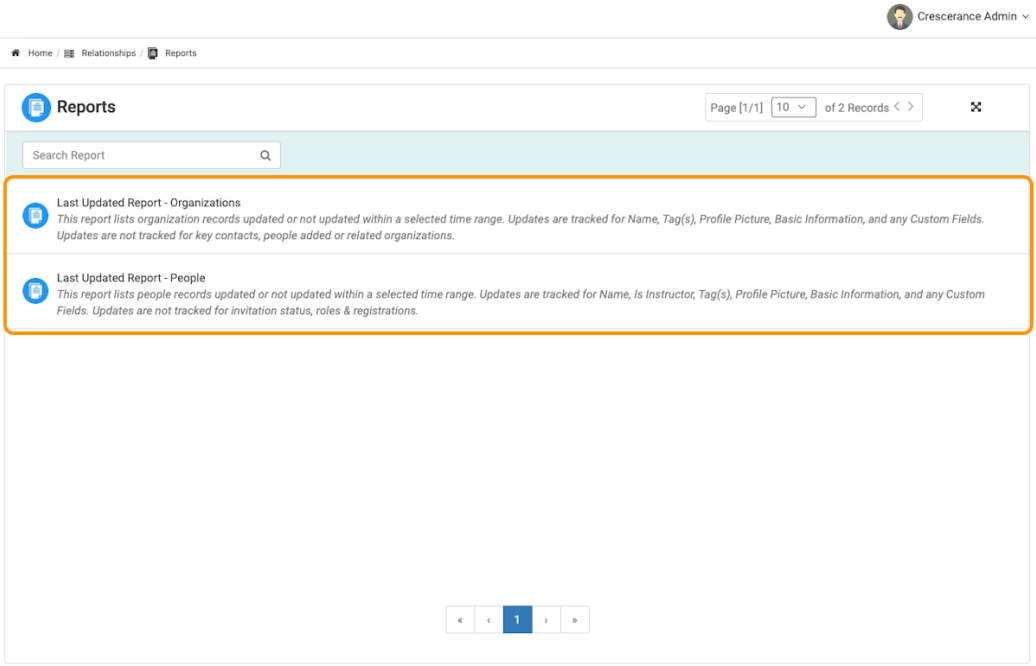
STEP 2

Click on Reports



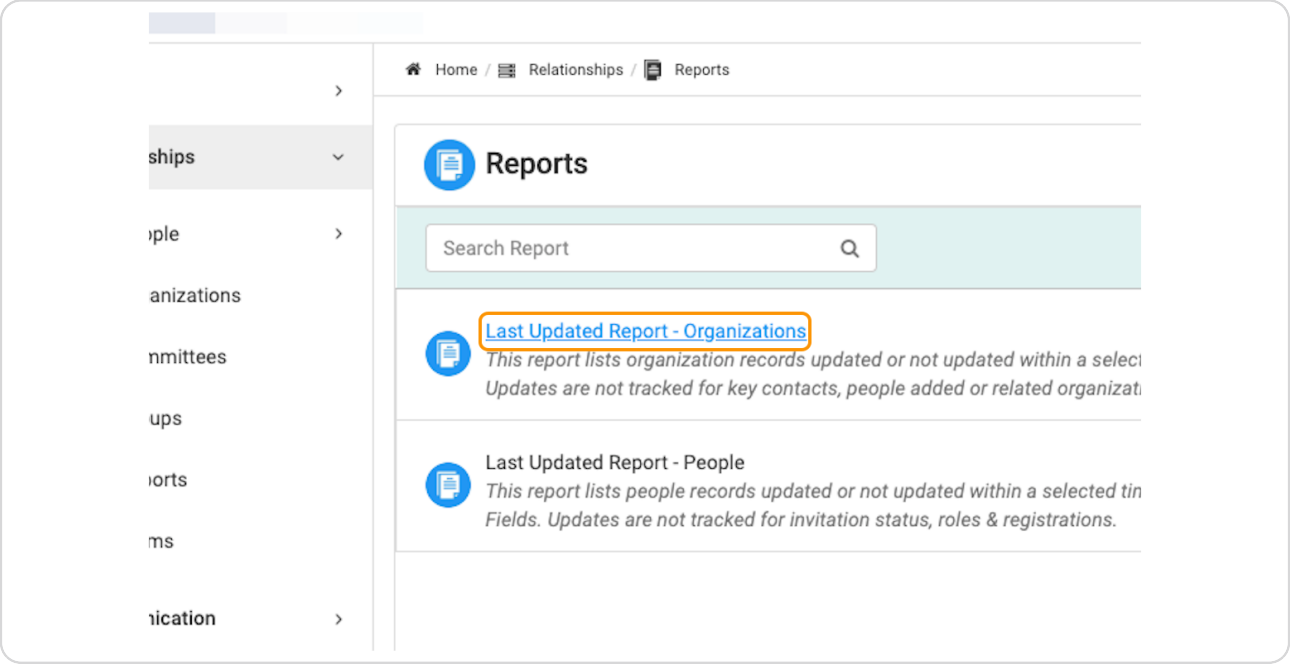
STEP 3

Here are the two types of Last Action Report available – for People and Organizations.



STEP 4

Click on Last Updated Report - Organizations

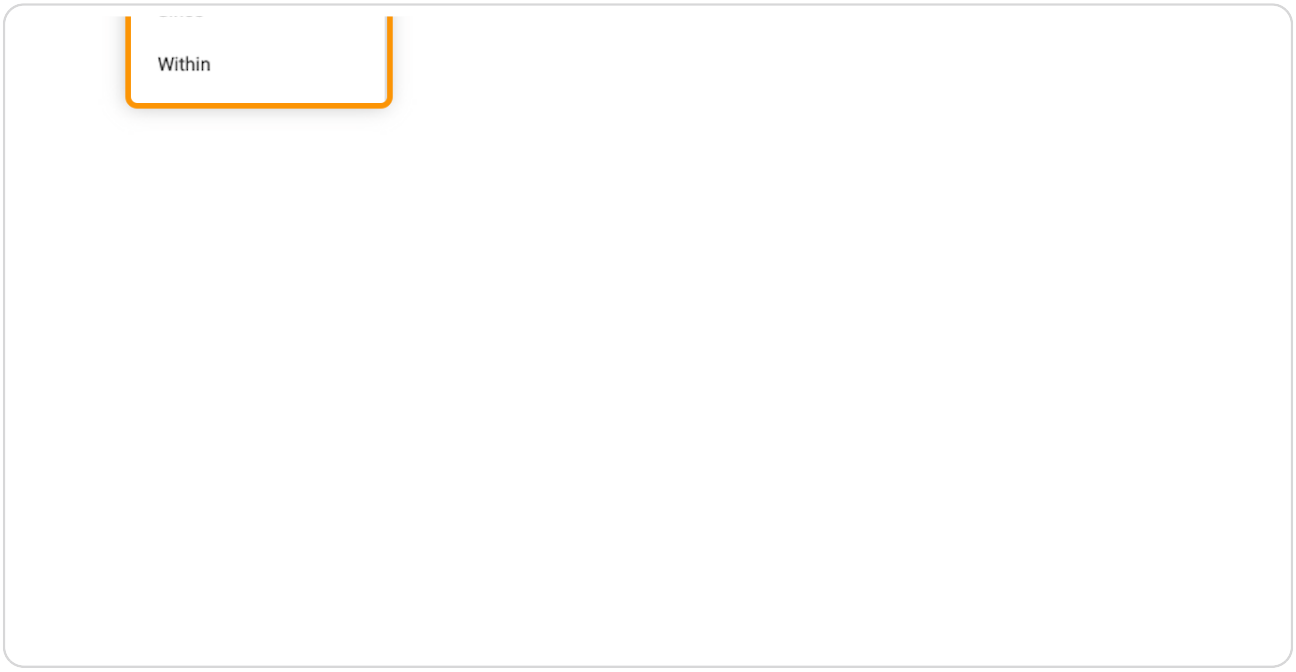


STEP 5

Click on Select to create your report parameters

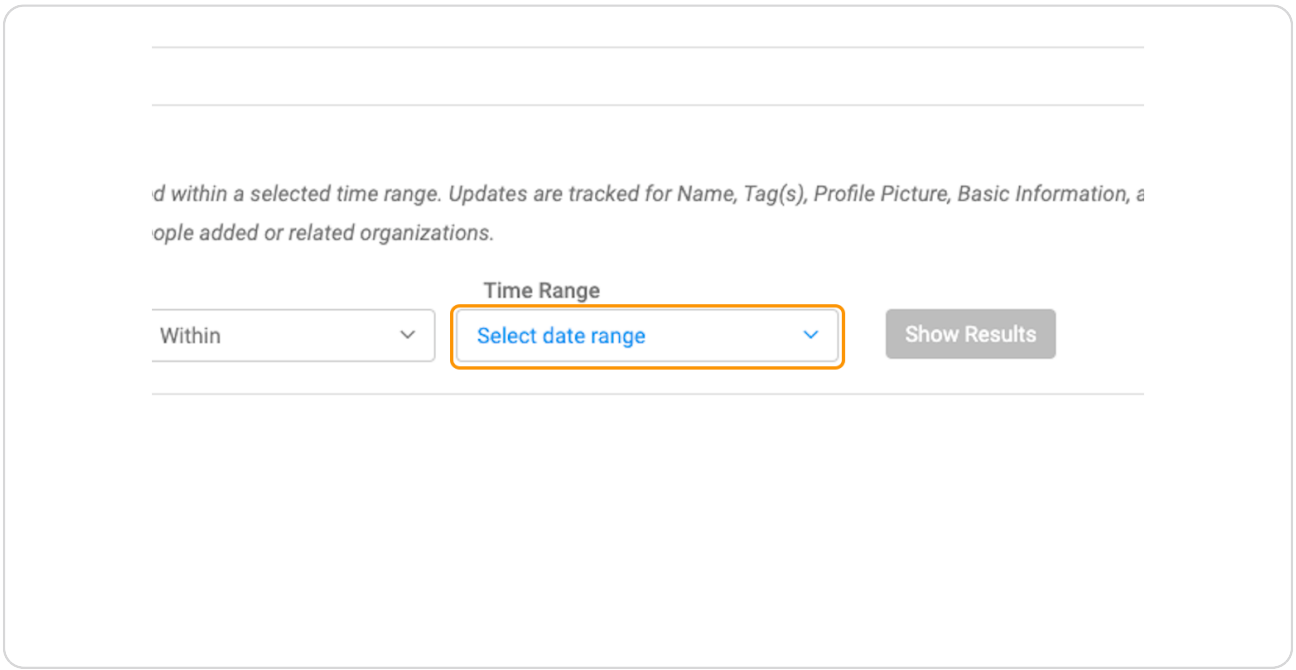
STEP 6

Click on Updated



STEP 7

Click on Select date range

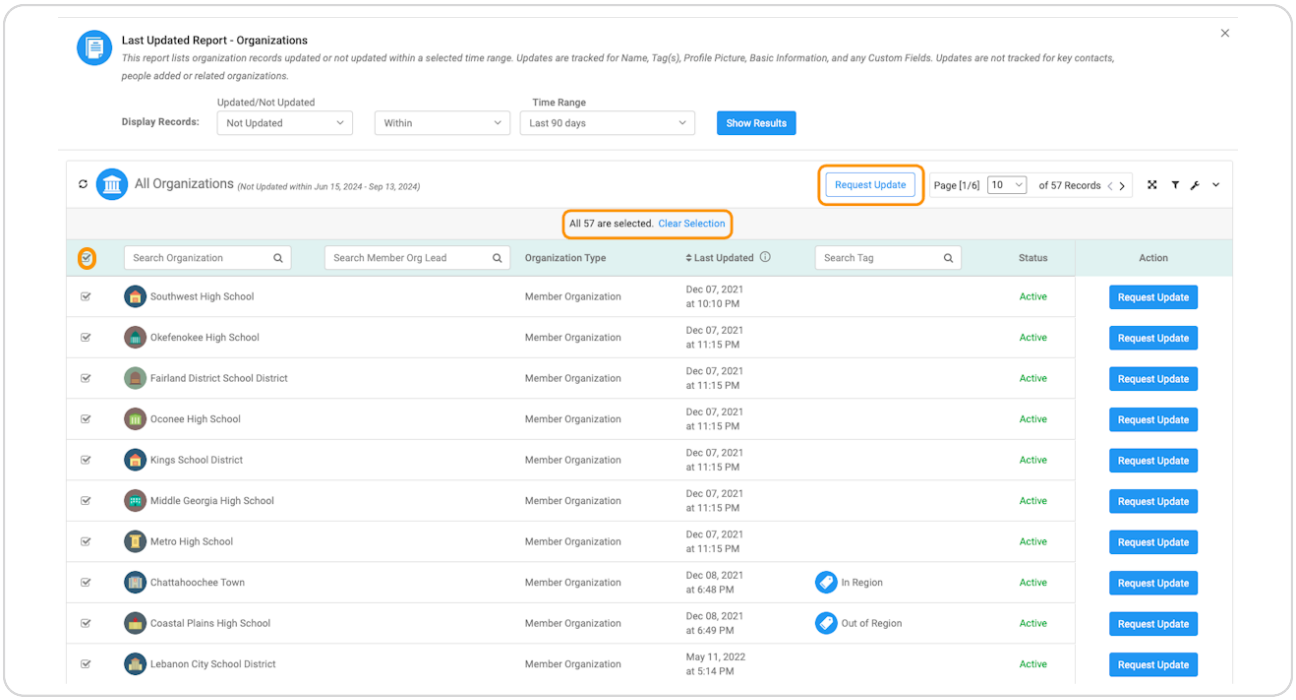


STEP 8

Click on Show Results when finished making selections

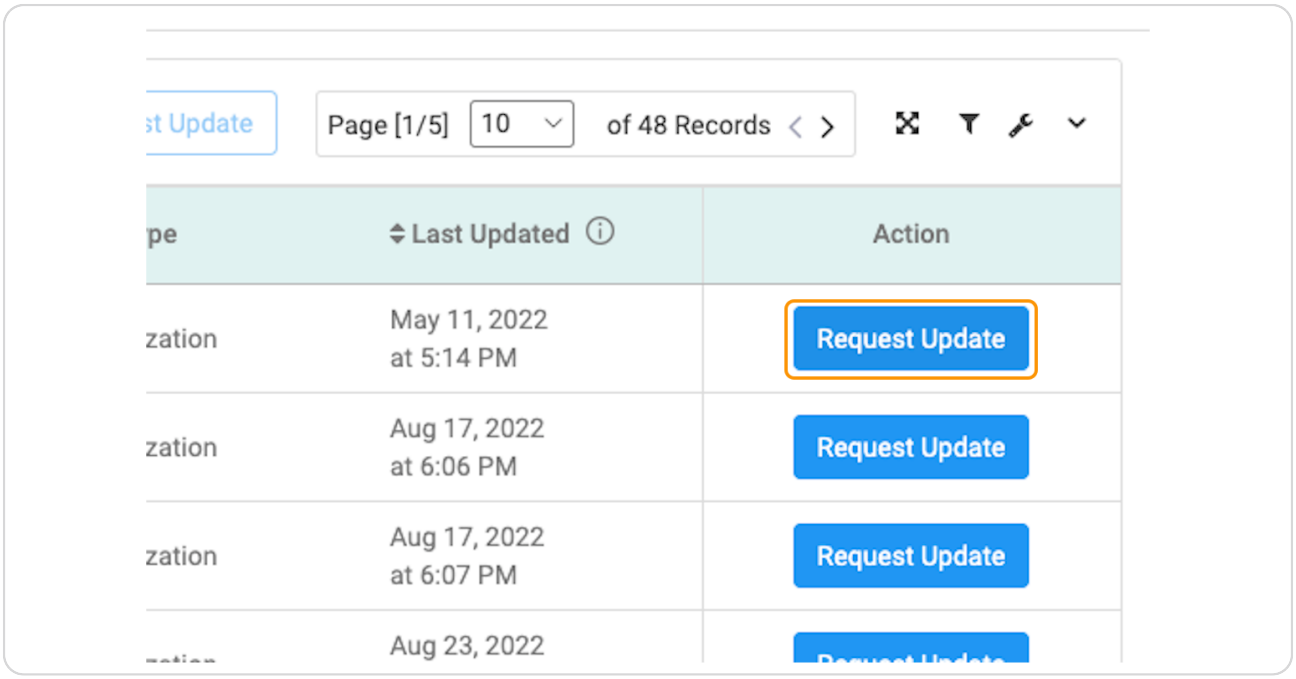
STEP 9

Check the box to Select All and then click the Request Update to send a mass request to update email.



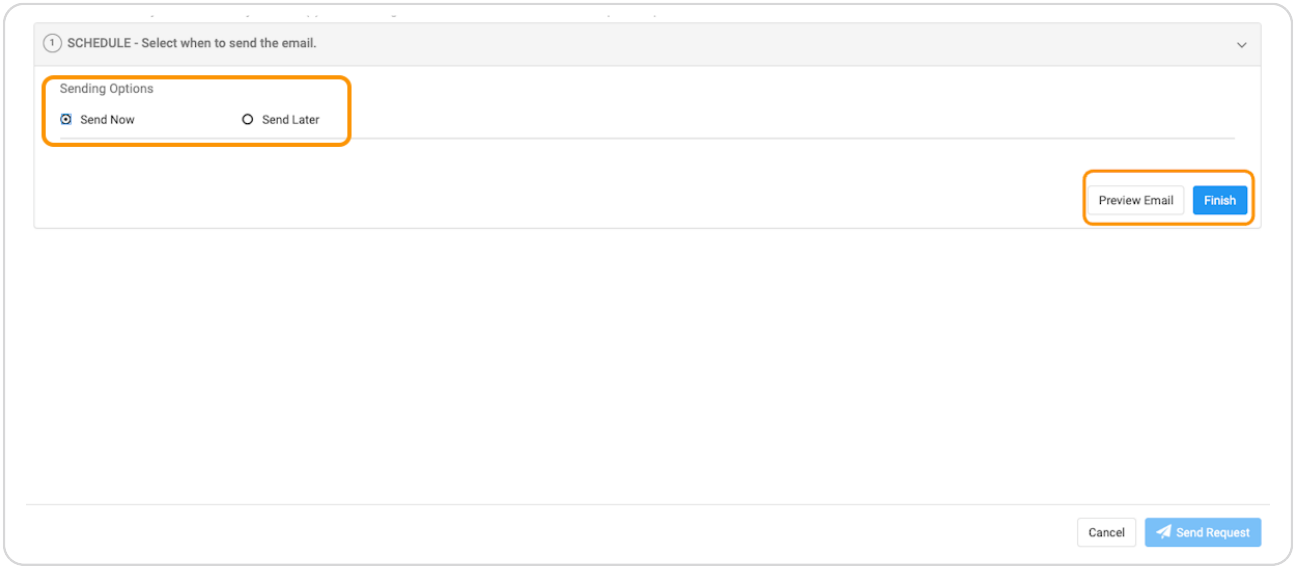
STEP 10

Or click on Request Update to send an email requesting the organization contact to request an individual update.



STEP 11

Select email sending options (now or later) and then either Preview Email or Finish

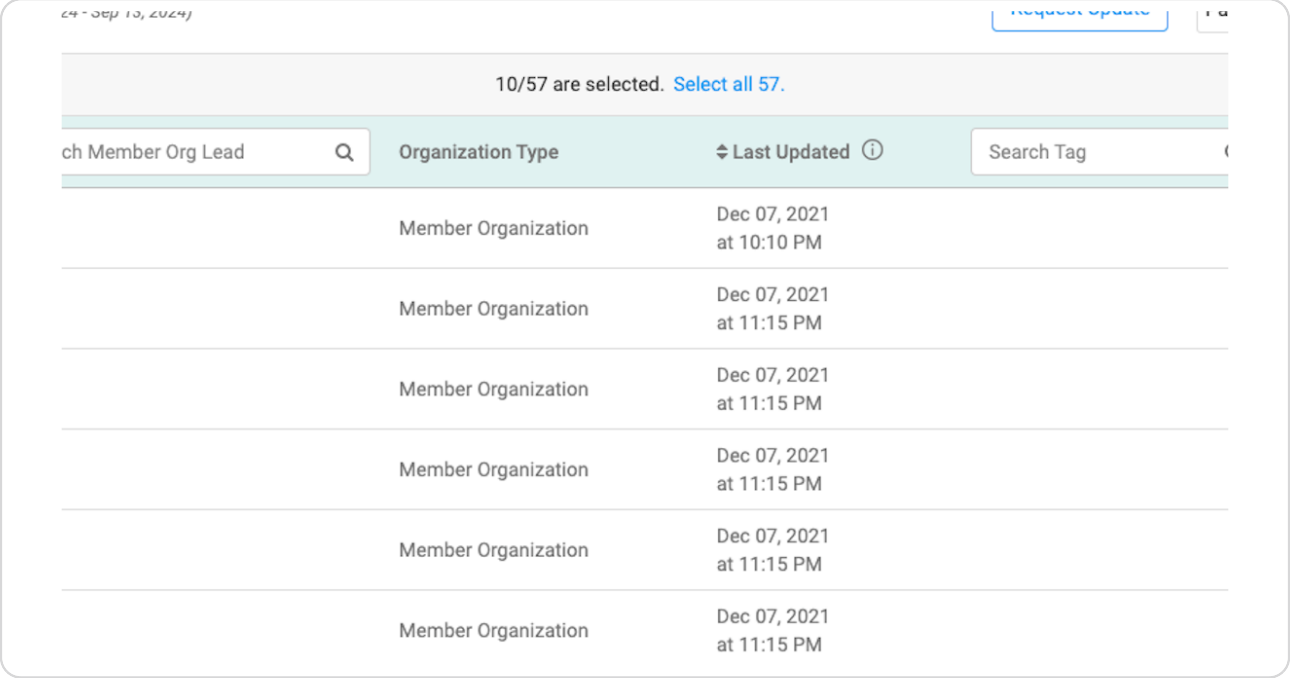


STEP 12

Click on Send Request when finished

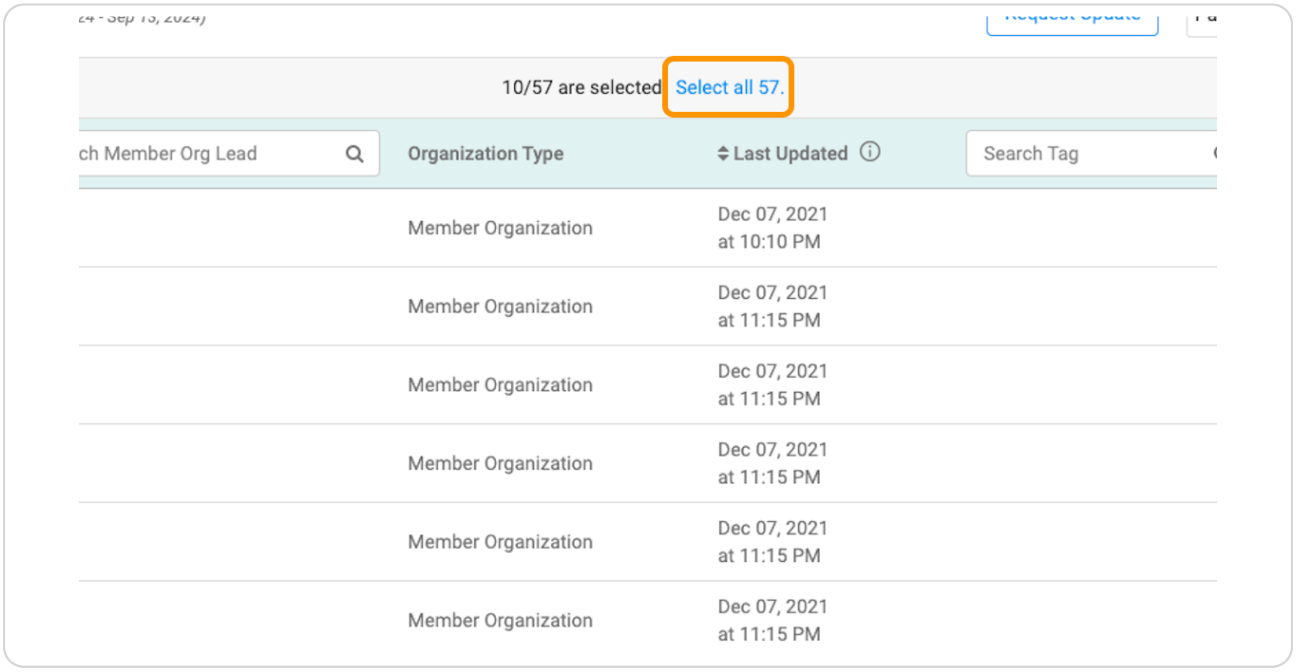
STEP 13

Select All to export a report and click on Select all



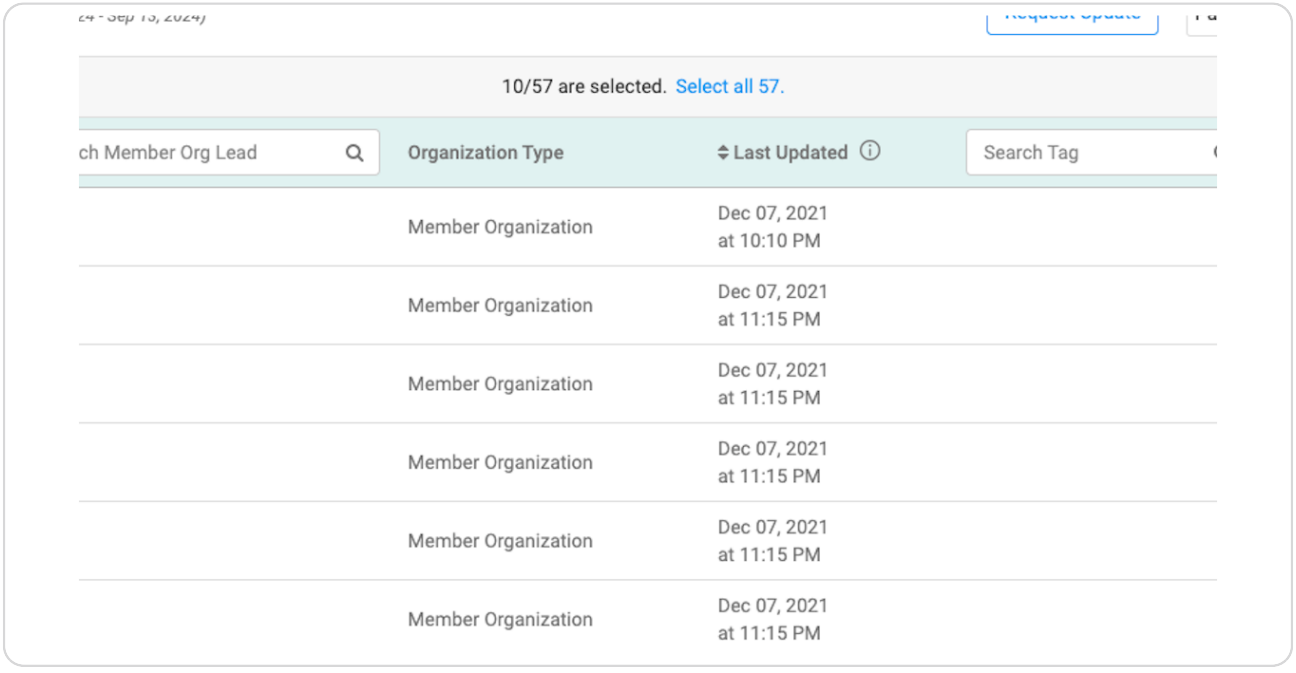
STEP 14

Click on Select all to make sure all are included in the export



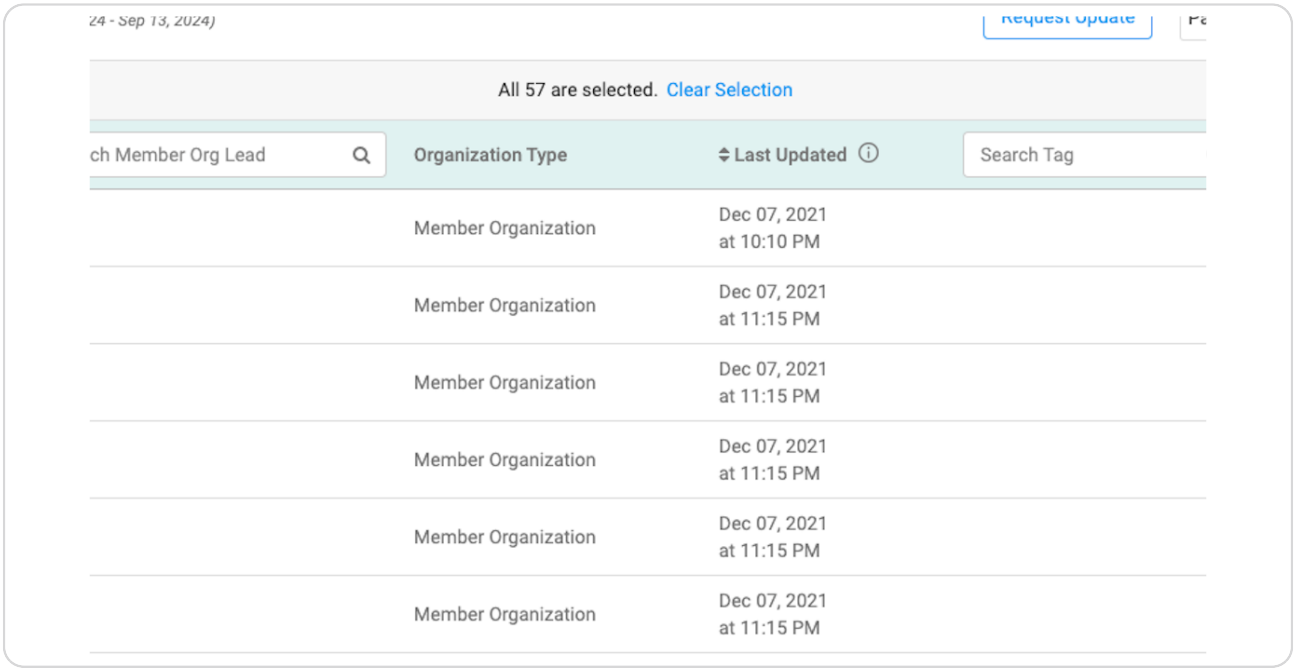
STEP 15

Click on wrench icon to open the settings



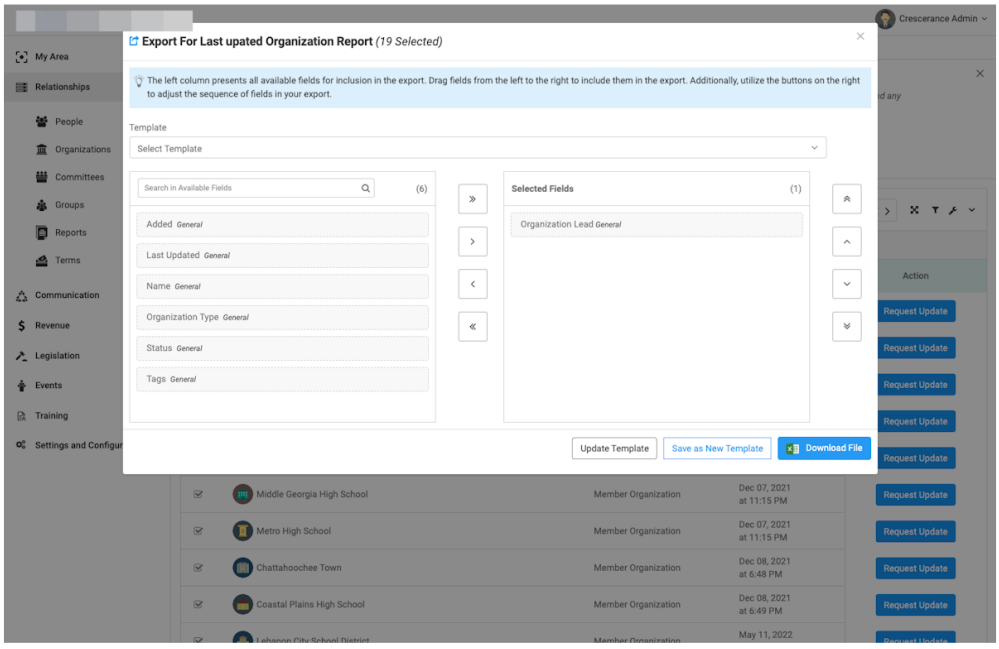
STEP 16

Click on Export (XX Selected)



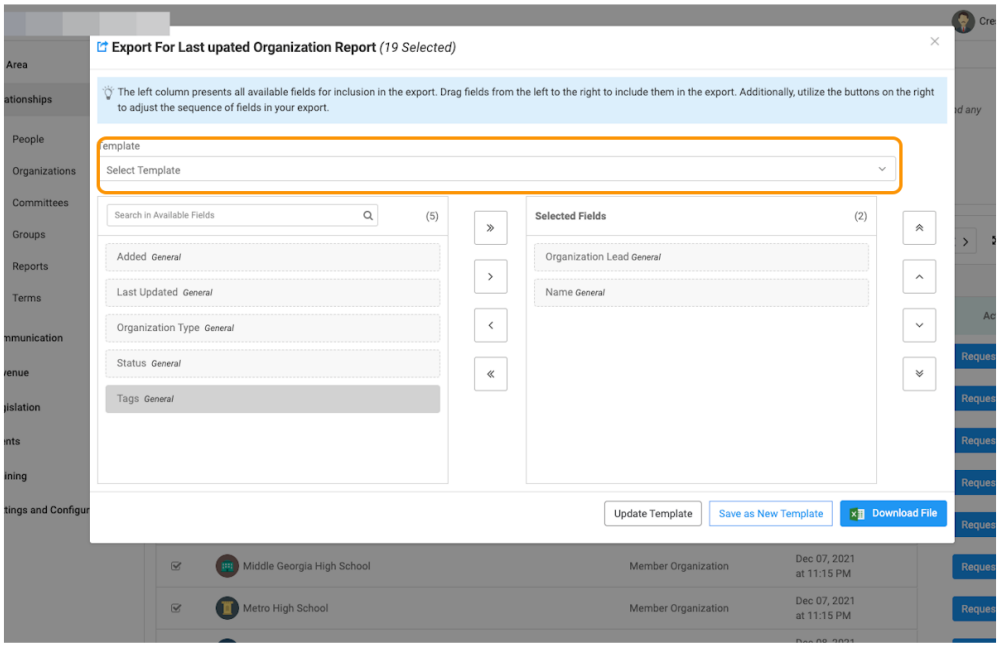
STEP 17

A pop up will open for you to select your fields for the export report



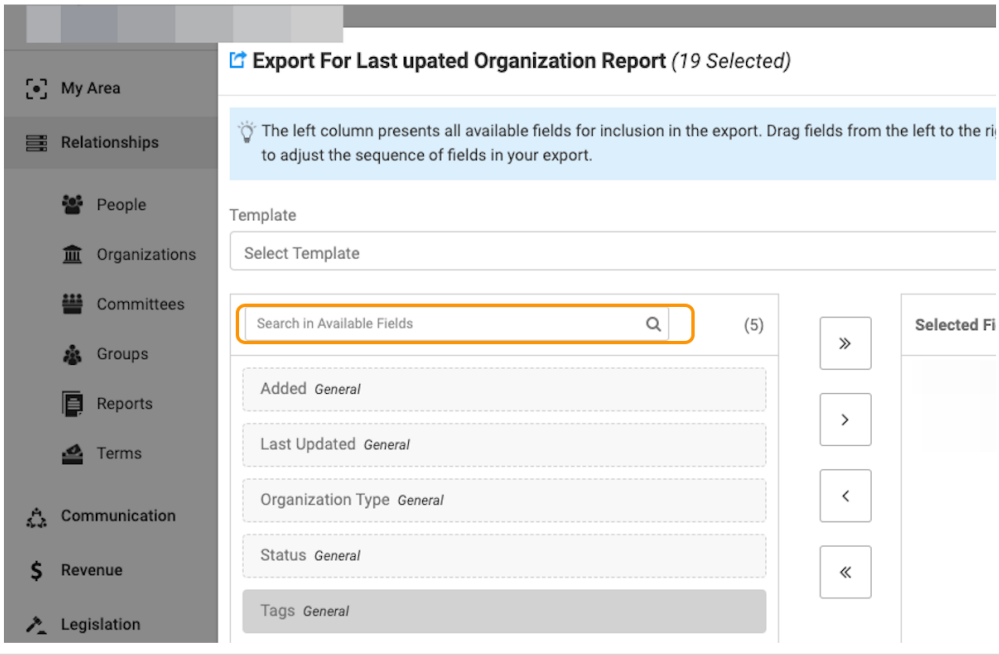
STEP 18

Select a previously created template (if available)



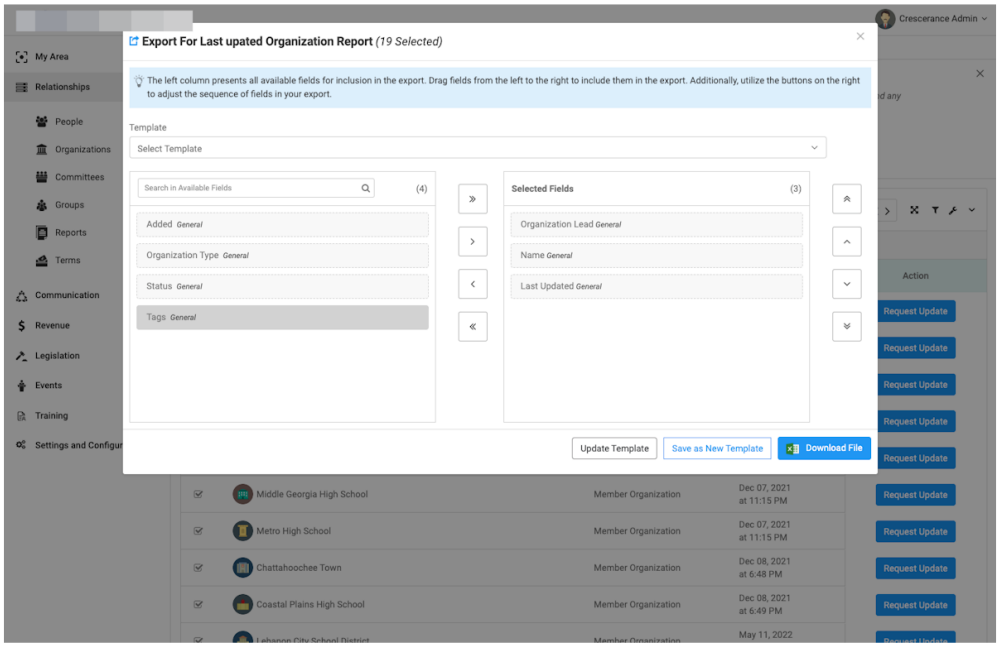
STEP 19

Begin typing field criteria and drag over to right box



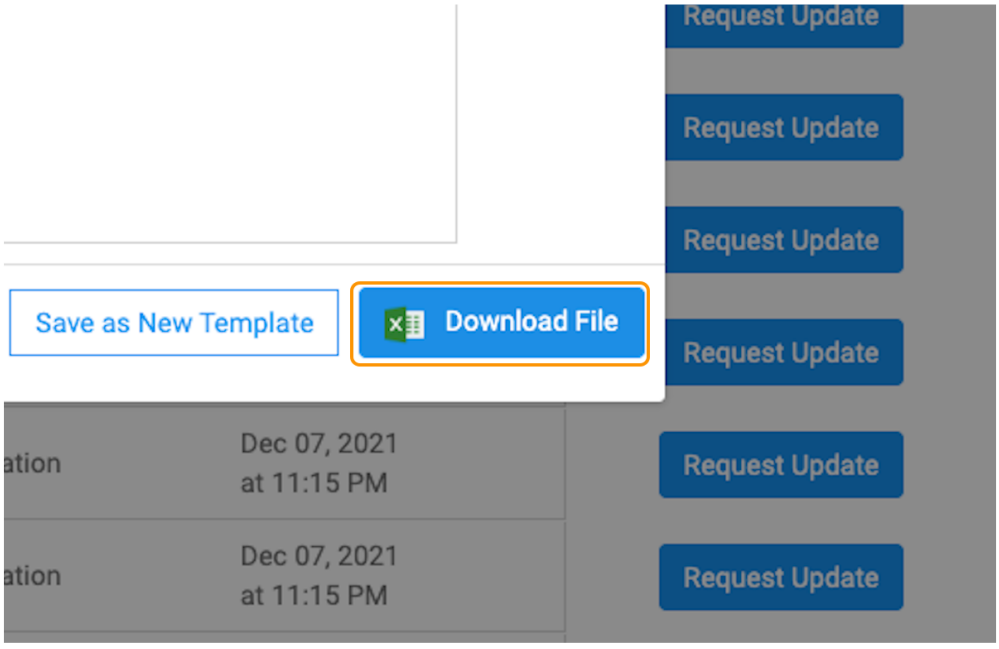
STEP 20

Drag highlighted option



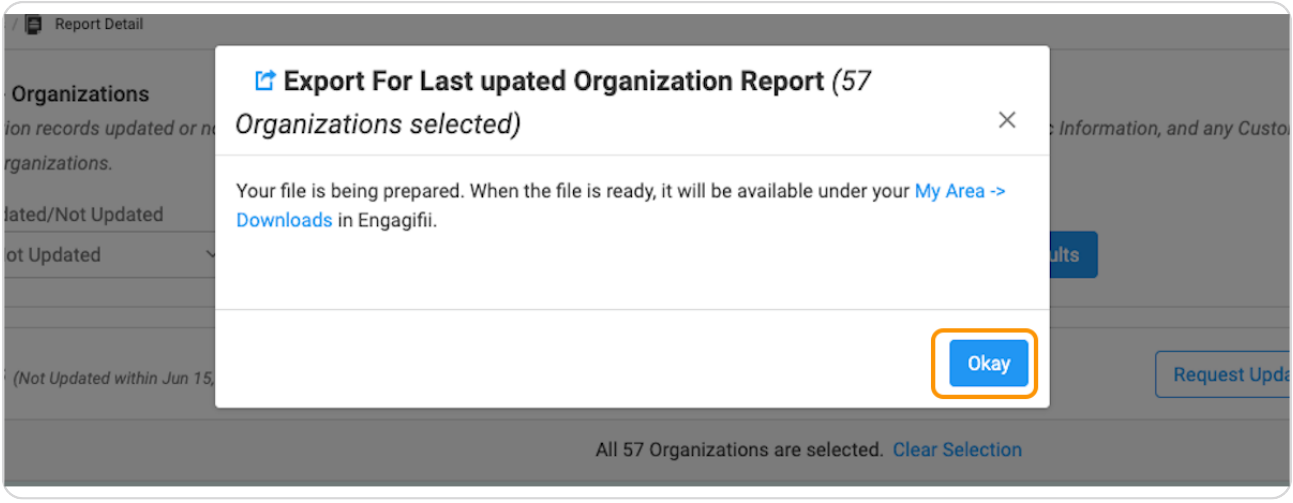
STEP 21

Click on Download File when finished making selections



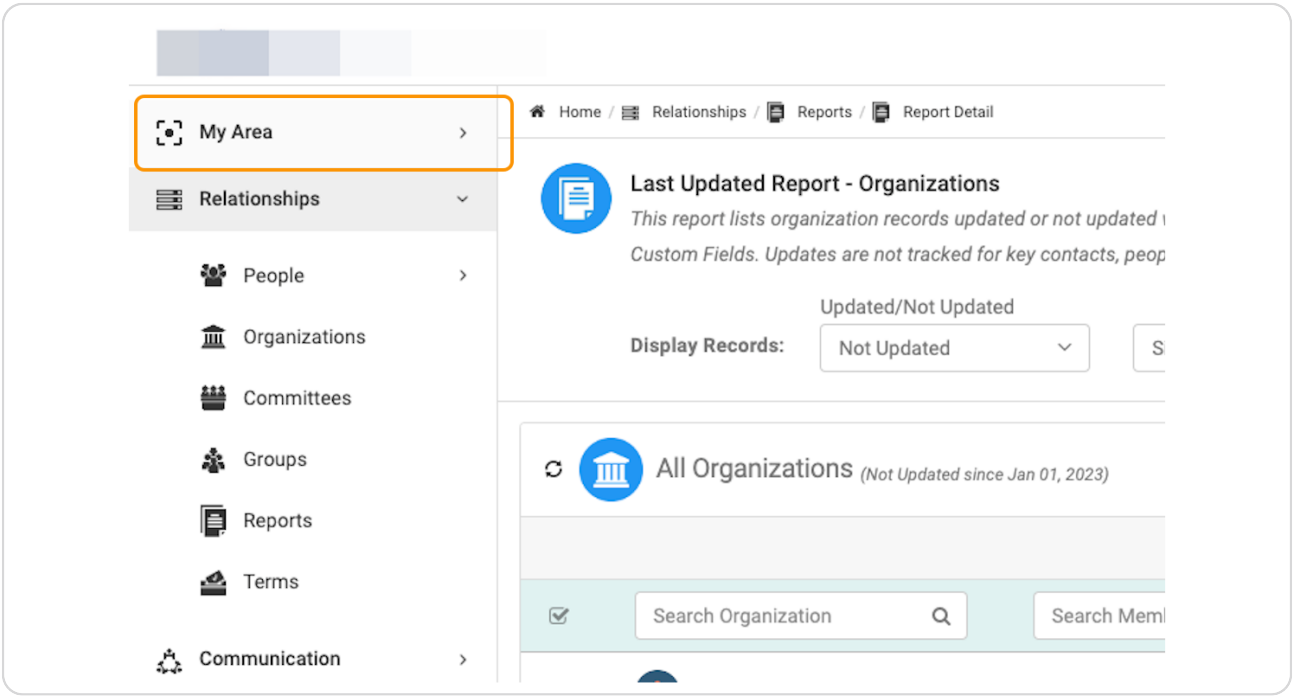
STEP 22

Your report is being generated and will be available in My Area / My Downloadss



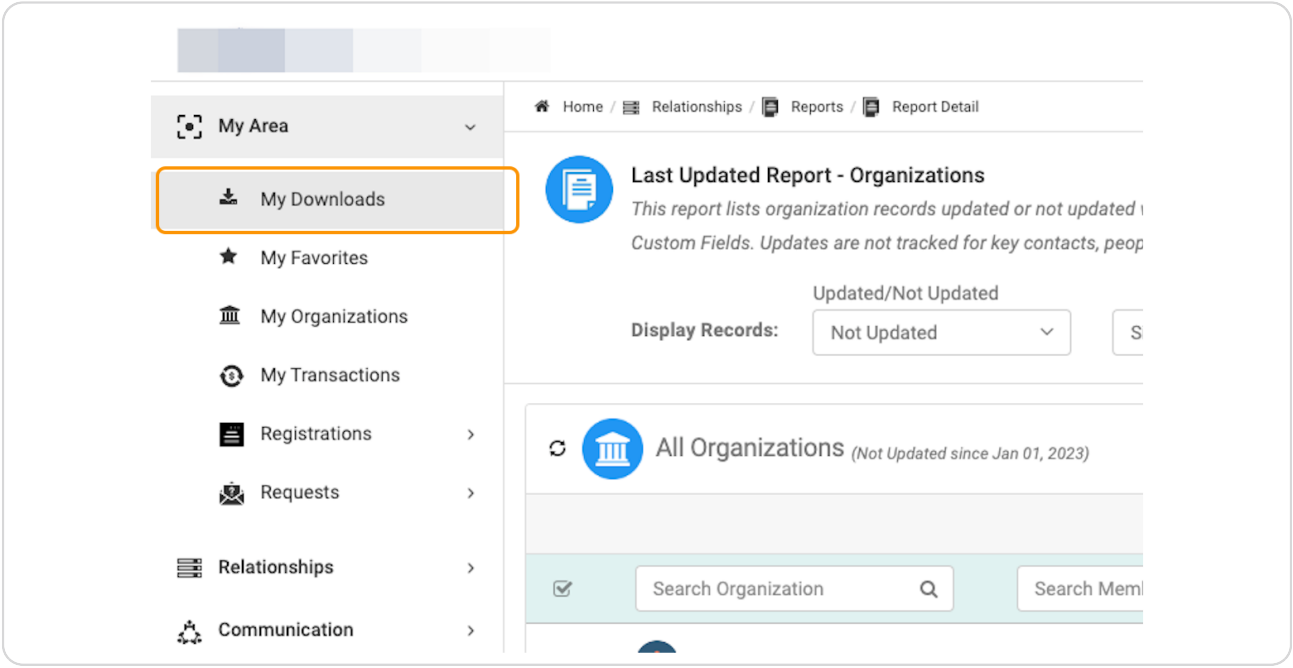
STEP 23

Click on My Area



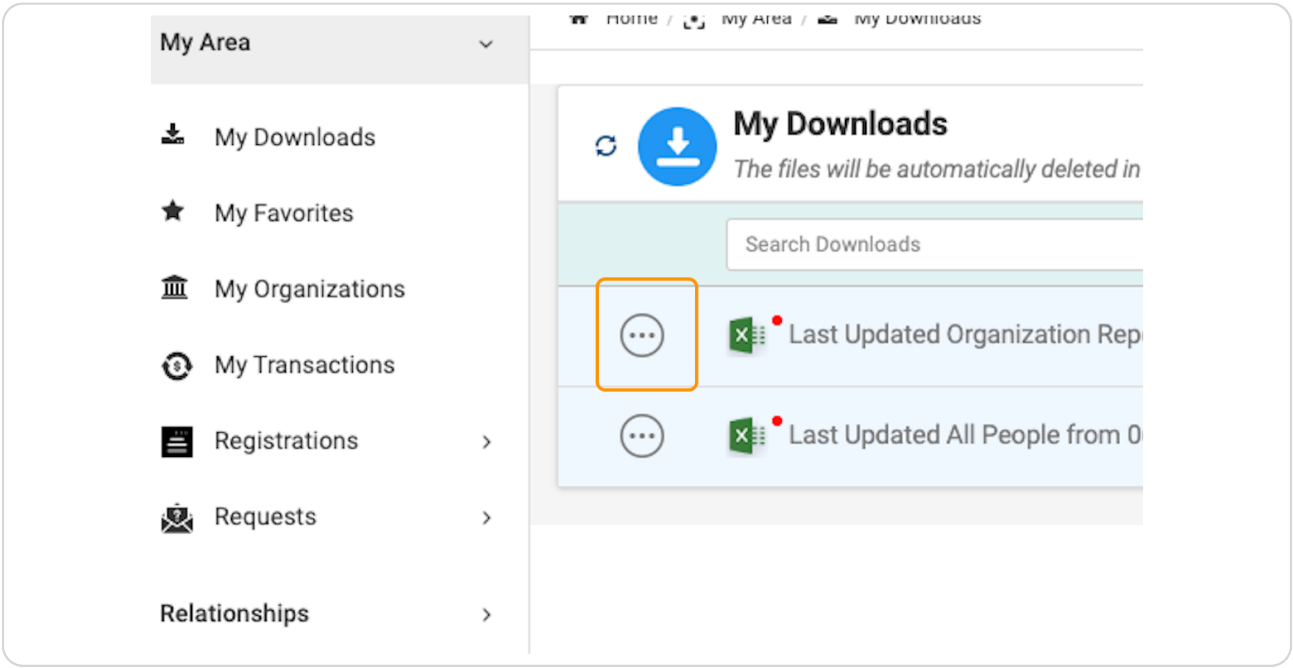
STEP 24

Click on My Downloads



STEP 25

Click on your report



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