

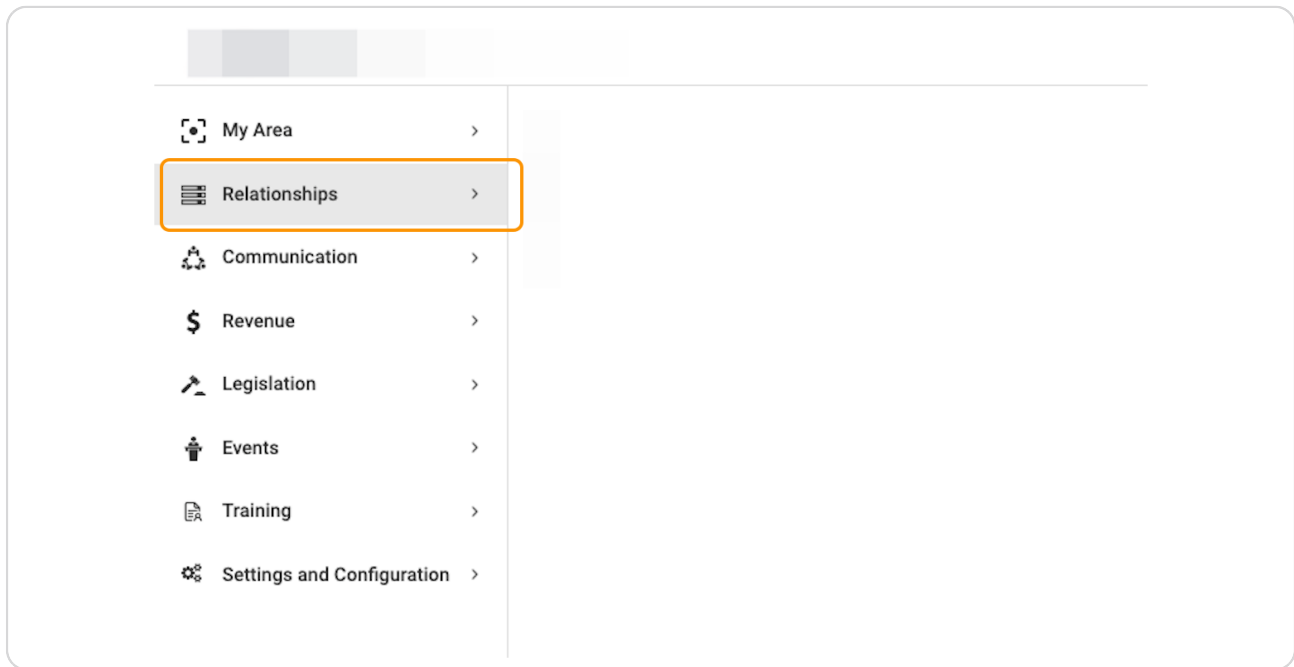
Last Updated Reports - Organizations

25 Steps [View most recent version](#) 

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

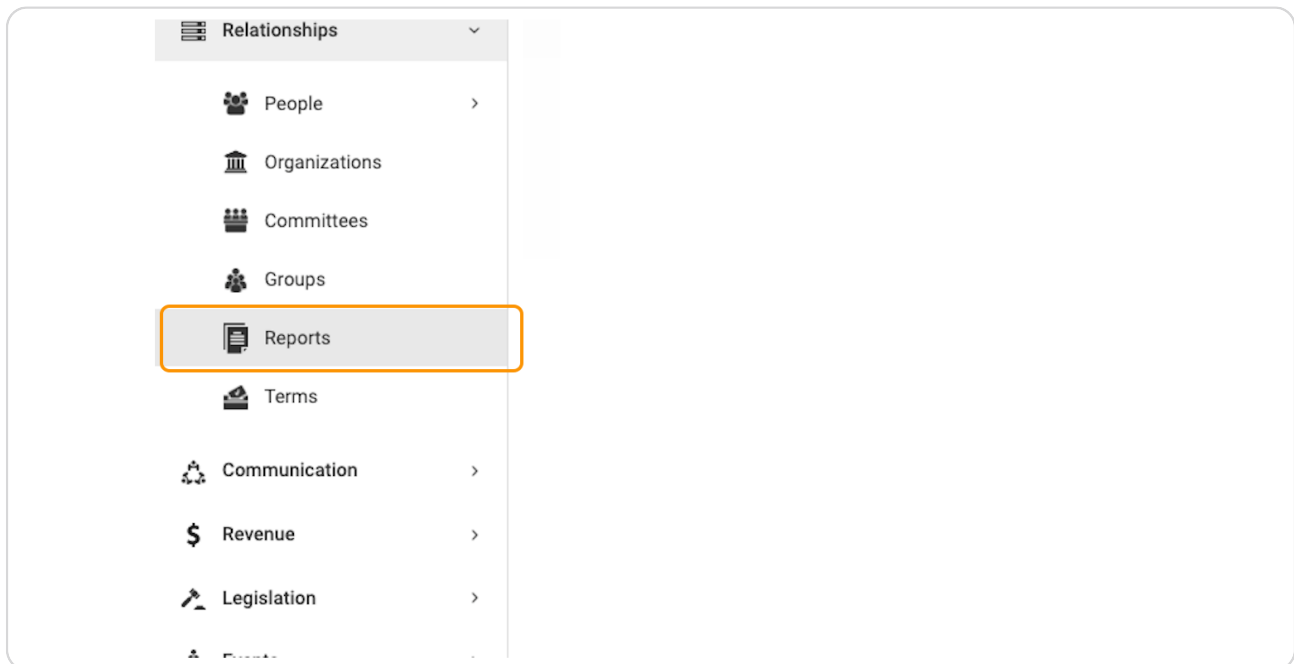
STEP 1

Click on Relationships



STEP 2

Click on Reports



STEP 3

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

Home / Relationships / Reports

Crescance Admin

Reports

Page 1/1 10 of 2 Records

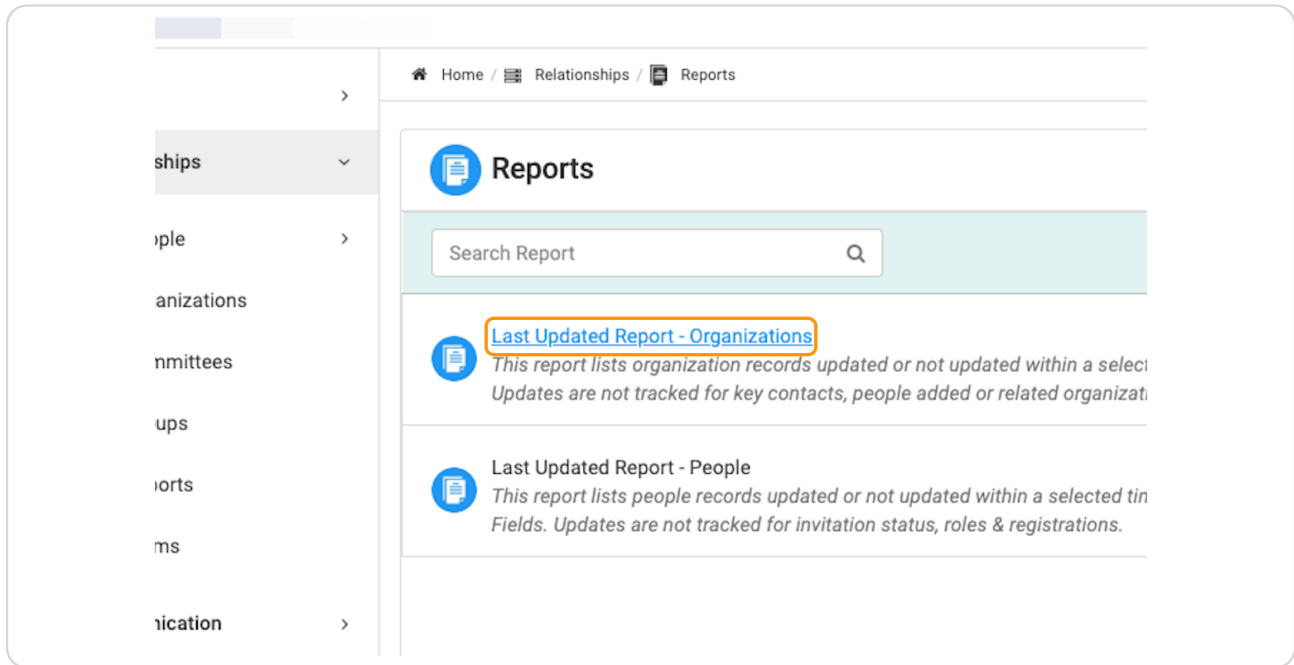
Search Report

- Last Updated Report - Organizations**
This report lists organization records updated or not updated within a selected time range. Updates are tracked for Name, Tag(s), Profile Picture, Basic Information, and any Custom Fields. Updates are not tracked for key contacts, people added or related organizations.
- Last Updated Report - People**
This report lists people records updated or not updated within a selected time range. Updates are tracked for Name, Is Instructor, Tag(s), Profile Picture, Basic Information, and any Custom Fields. Updates are not tracked for invitation status, roles & registrations.

« < 1 > »

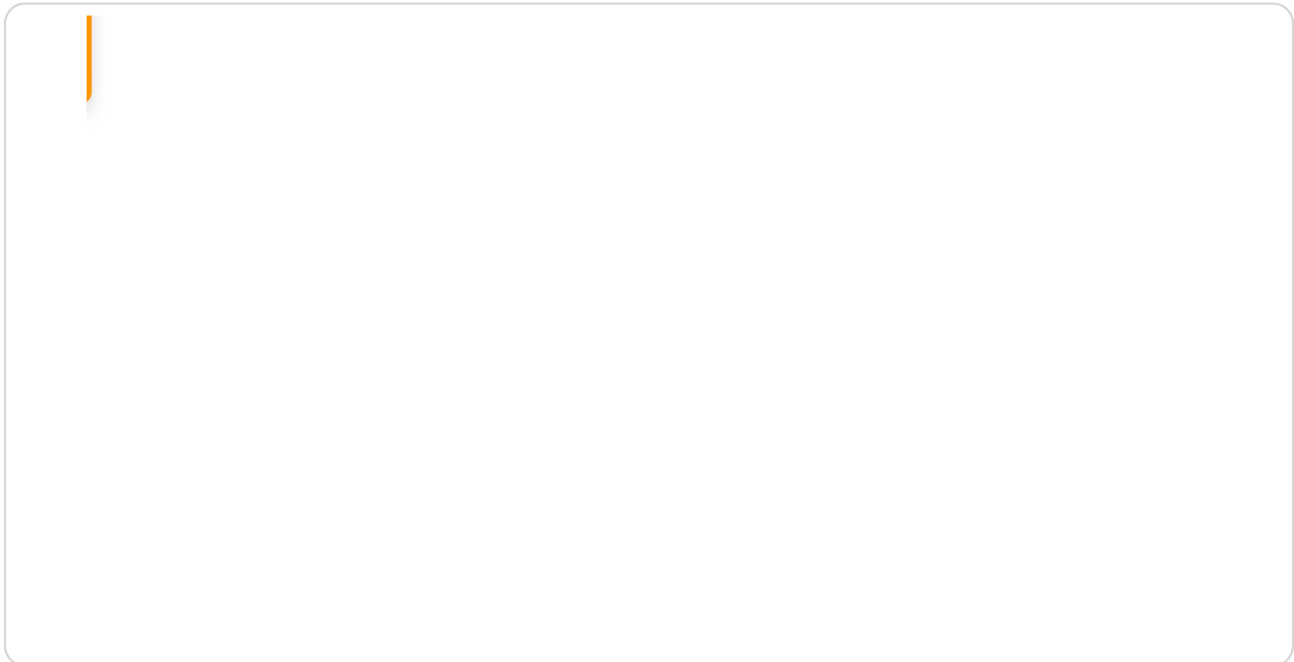
STEP 4

Click on Last Updated Report - Organizations



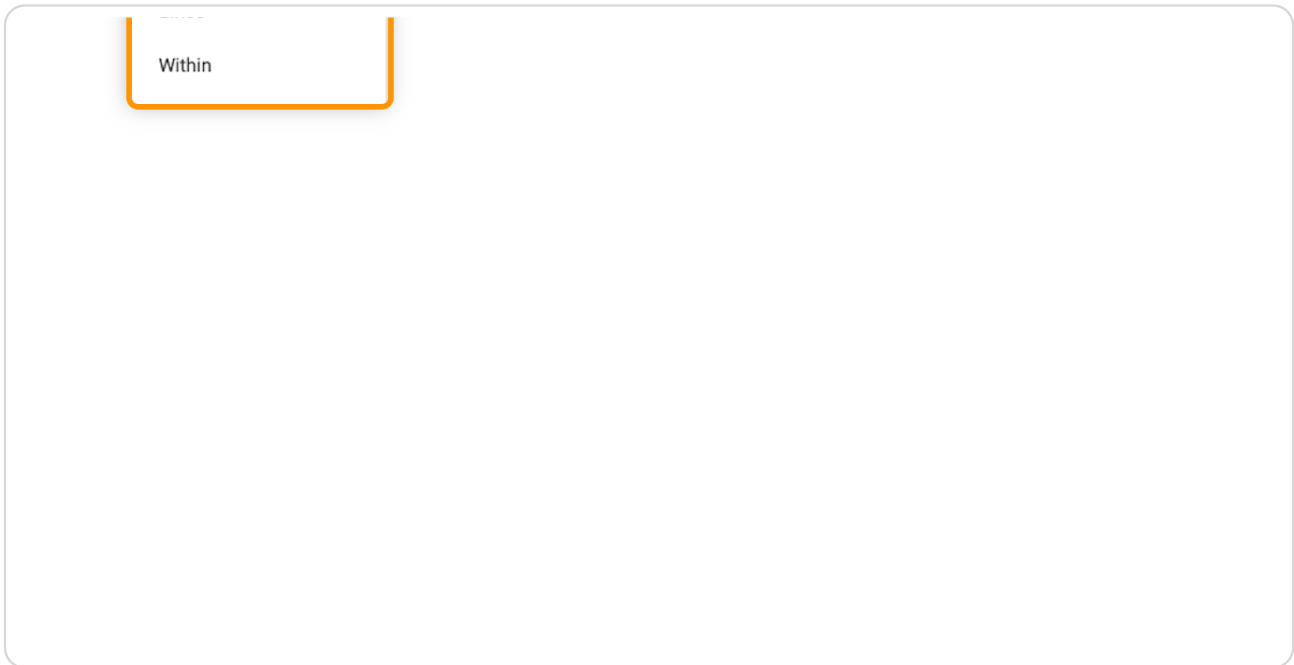
STEP 5

Click on Select to create your report parameters



STEP 6

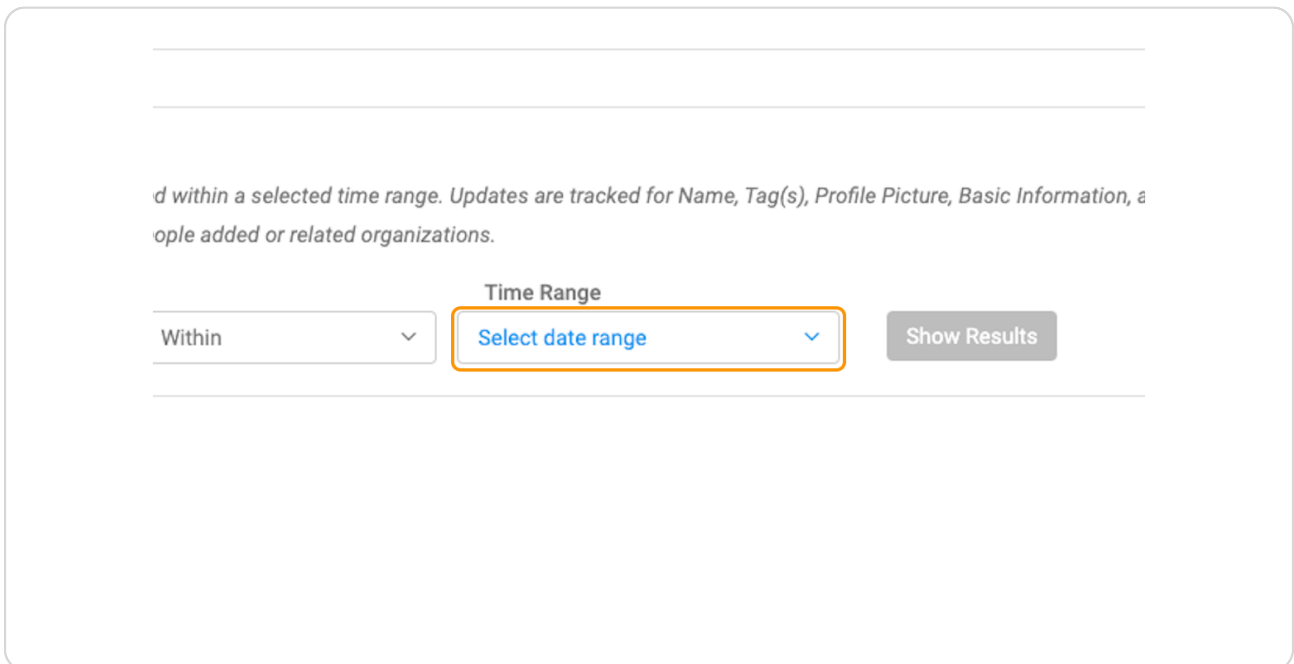
Click on Updated



A screenshot of a search filter interface. At the top left, there is a dropdown menu with the word "Within" selected. The dropdown menu is highlighted with a thick orange border. The rest of the interface is mostly blank with some faint horizontal lines.

STEP 7

Click on Select date range



A screenshot of a search filter interface. At the top, there are two horizontal lines. Below them, there is a paragraph of text: "d within a selected time range. Updates are tracked for Name, Tag(s), Profile Picture, Basic Information, a ople added or related organizations." Below the text, there is a search filter section. It includes a dropdown menu with "Within" selected, a "Time Range" label, a dropdown menu with "Select date range" selected (highlighted with a thick orange border), and a "Show Results" button. At the bottom, there are two horizontal lines.

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.

Last Updated Report - Organizations

This report lists organization records updated or not updated within a selected time range. Updates are tracked for Name, Tag(s), Profile Picture, Basic Information, and any Custom Fields. Updates are not tracked for key contacts, people added or related organizations.

Updated/Not Updated: Within: Time Range: [Show Results](#)

All Organizations (Not Updated within Jun 15, 2024 - Sep 13, 2024)

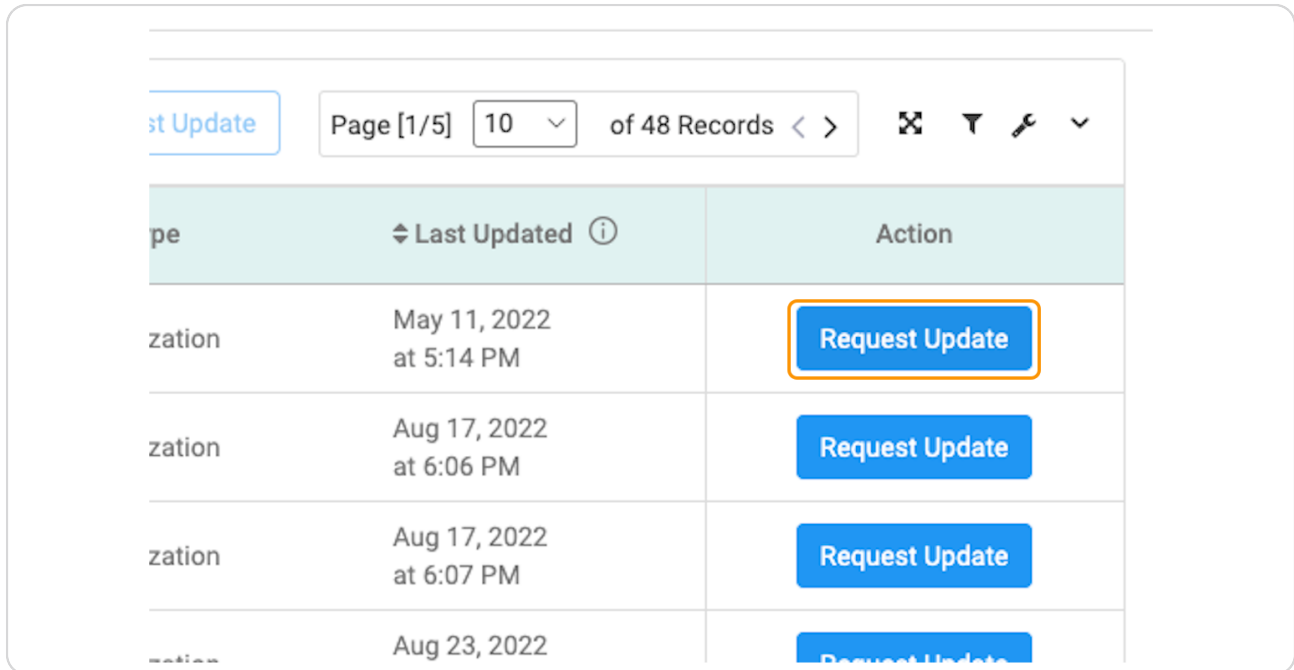
[Request Update](#) Page 1/6 | 10 of 57 Records

All 57 are selected. [Clear Selection](#)

<input checked="" type="checkbox"/>	Search Organization	Search Member Org Lead	Organization Type	Last Updated	Search Tag	Status	Action
<input checked="" type="checkbox"/>	Southwest High School		Member Organization	Dec 07, 2021 at 10:10 PM		Active	Request Update
<input checked="" type="checkbox"/>	Okefenokee High School		Member Organization	Dec 07, 2021 at 11:15 PM		Active	Request Update
<input checked="" type="checkbox"/>	Fairland District School District		Member Organization	Dec 07, 2021 at 11:15 PM		Active	Request Update
<input checked="" type="checkbox"/>	Oconee High School		Member Organization	Dec 07, 2021 at 11:15 PM		Active	Request Update
<input checked="" type="checkbox"/>	Kings School District		Member Organization	Dec 07, 2021 at 11:15 PM		Active	Request Update
<input checked="" type="checkbox"/>	Middle Georgia High School		Member Organization	Dec 07, 2021 at 11:15 PM		Active	Request Update
<input checked="" type="checkbox"/>	Metro High School		Member Organization	Dec 07, 2021 at 11:15 PM		Active	Request Update
<input checked="" type="checkbox"/>	Chattahoochee Town		Member Organization	Dec 08, 2021 at 6:48 PM	In Region	Active	Request Update
<input checked="" type="checkbox"/>	Coastal Plains High School		Member Organization	Dec 08, 2021 at 6:49 PM	Out of Region	Active	Request Update
<input checked="" type="checkbox"/>	Lebanon City School District		Member Organization	May 11, 2022 at 5:14 PM		Active	Request Update

STEP 10

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

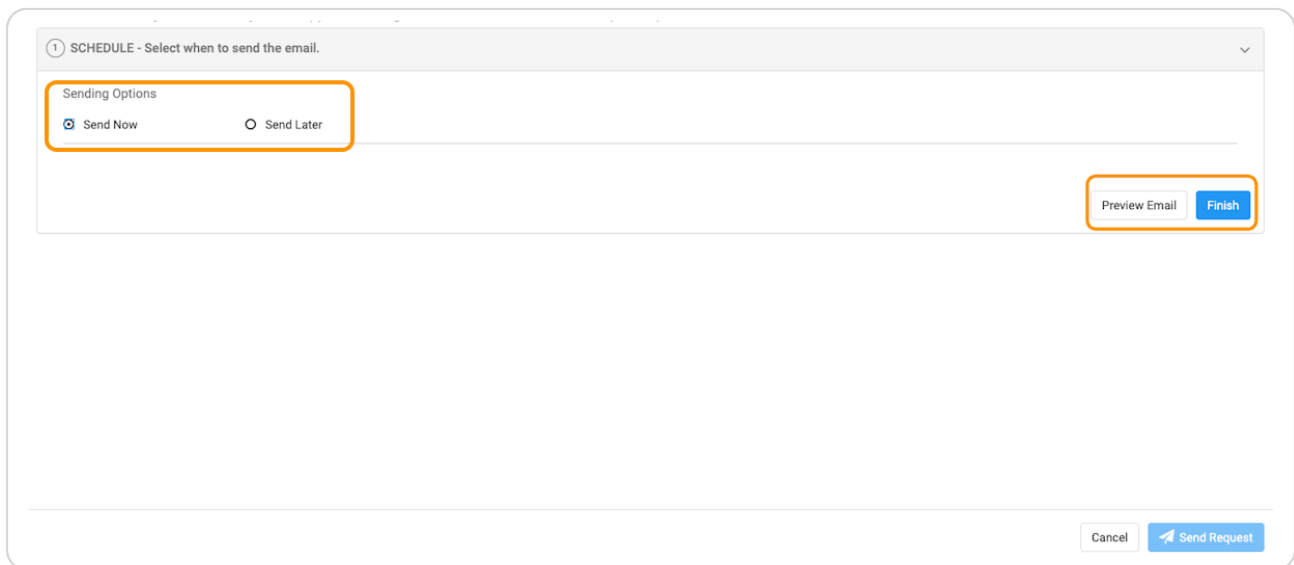


The screenshot shows a table with the following columns: 'Type', 'Last Updated', and 'Action'. The 'Last Updated' column includes a sort icon and an information icon. The 'Action' column contains blue 'Request Update' buttons. The first row is highlighted, and its 'Request Update' button is circled in orange.

Type	↕ Last Updated ⓘ	Action
Organization	May 11, 2022 at 5:14 PM	Request Update
Organization	Aug 17, 2022 at 6:06 PM	Request Update
Organization	Aug 17, 2022 at 6:07 PM	Request Update
Organization	Aug 23, 2022	Request Update

STEP 11

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



The screenshot shows a dialog box titled 'SCHEDULE - Select when to send the email.' It contains a 'Sending Options' section with two radio buttons: 'Send Now' (selected) and 'Send Later'. At the bottom right, there are 'Preview Email' and 'Finish' buttons. At the bottom center, there are 'Cancel' and 'Send Request' buttons.

SCHEDULE - Select when to send the email.

Sending Options

Send Now Send Later

Preview Email Finish

Cancel Send Request

STEP 12

Click on Send Request when finished



STEP 13

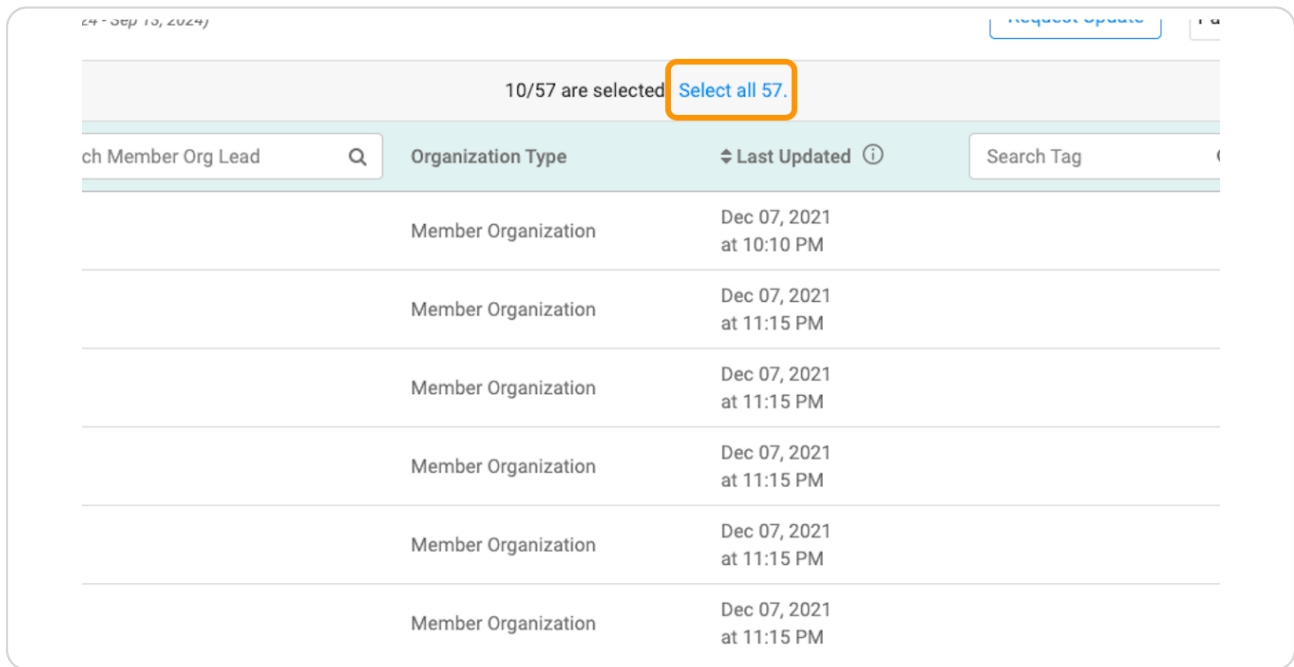
Select All to export a report and click on Select all

10/57 are selected. [Select all 57.](#)

ch Member Org Lead	Organization Type	Last Updated	Search Tag
	Member Organization	Dec 07, 2021 at 10:10 PM	
	Member Organization	Dec 07, 2021 at 11:15 PM	
	Member Organization	Dec 07, 2021 at 11:15 PM	
	Member Organization	Dec 07, 2021 at 11:15 PM	
	Member Organization	Dec 07, 2021 at 11:15 PM	
	Member Organization	Dec 07, 2021 at 11:15 PM	

STEP 14

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

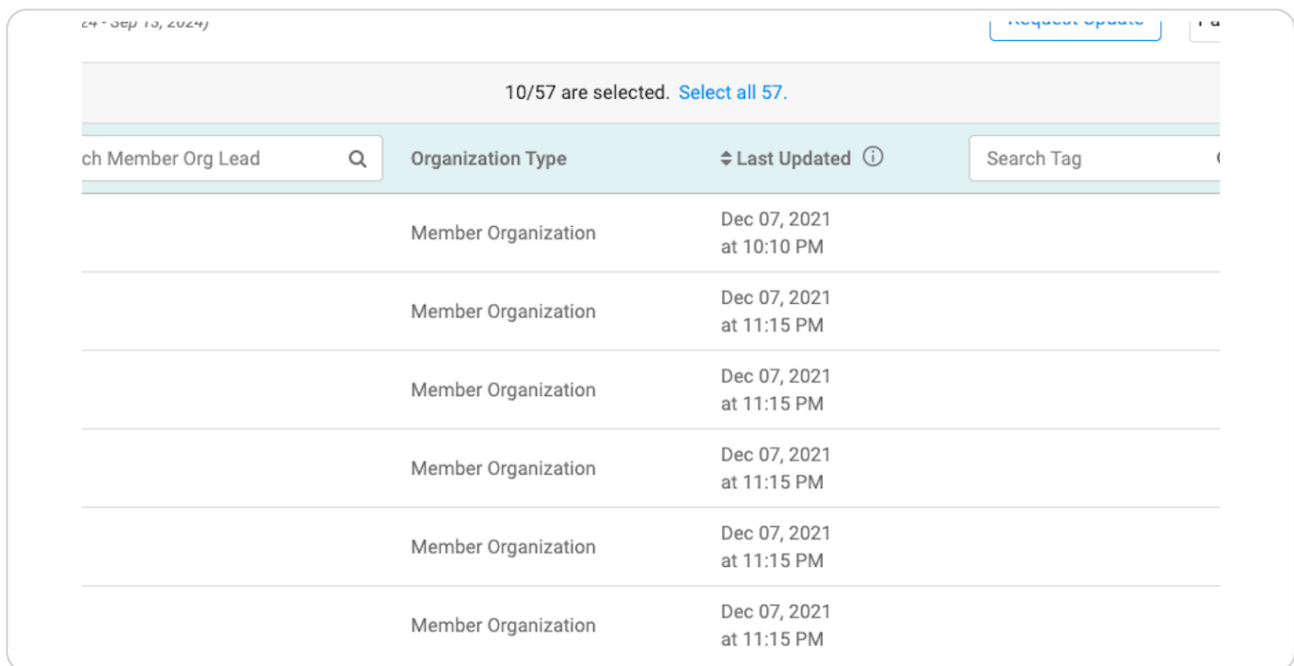


10/57 are selected. **Select all 57.**

ch Member Org Lead	Organization Type	Last Updated	Search Tag
	Member Organization	Dec 07, 2021 at 10:10 PM	
	Member Organization	Dec 07, 2021 at 11:15 PM	
	Member Organization	Dec 07, 2021 at 11:15 PM	
	Member Organization	Dec 07, 2021 at 11:15 PM	
	Member Organization	Dec 07, 2021 at 11:15 PM	
	Member Organization	Dec 07, 2021 at 11:15 PM	

STEP 15

Click on wrench icon to open the settings



10/57 are selected. [Select all 57.](#)

ch Member Org Lead	Organization Type	Last Updated	Search Tag
	Member Organization	Dec 07, 2021 at 10:10 PM	
	Member Organization	Dec 07, 2021 at 11:15 PM	
	Member Organization	Dec 07, 2021 at 11:15 PM	
	Member Organization	Dec 07, 2021 at 11:15 PM	
	Member Organization	Dec 07, 2021 at 11:15 PM	
	Member Organization	Dec 07, 2021 at 11:15 PM	

STEP 16

Click on Export (XX Selected)

24 - Sep 13, 2024

request update

All 57 are selected. [Clear Selection](#)

ch Member Org Lead	Organization Type	Last Updated	Search Tag
	Member Organization	Dec 07, 2021 at 10:10 PM	
	Member Organization	Dec 07, 2021 at 11:15 PM	
	Member Organization	Dec 07, 2021 at 11:15 PM	
	Member Organization	Dec 07, 2021 at 11:15 PM	
	Member Organization	Dec 07, 2021 at 11:15 PM	
	Member Organization	Dec 07, 2021 at 11:15 PM	

STEP 17

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

Export For Last updated Organization Report (19 Selected)

The left column presents all available fields for inclusion in the export. Drag fields from the left to the right to include them in the export. Additionally, utilize the buttons on the right to adjust the sequence of fields in your export.

Template: Select Template

Search in Available Fields (6)

- Added General
- Last Updated General
- Name General
- Organization Type General
- Status General
- Tags General

Selected Fields (1)

- Organization Lead General

Update Template | Save as New Template | Download File

<input checked="" type="checkbox"/>	Middle Georgia High School	Member Organization	Dec 07, 2021 at 11:15 PM	Request Update
<input checked="" type="checkbox"/>	Metro High School	Member Organization	Dec 07, 2021 at 11:15 PM	Request Update
<input checked="" type="checkbox"/>	Chattahoochee Town	Member Organization	Dec 08, 2021 at 6:48 PM	Request Update
<input checked="" type="checkbox"/>	Coastal Plains High School	Member Organization	Dec 08, 2021 at 6:49 PM	Request Update
<input checked="" type="checkbox"/>	Hubbards Plains School District	Member Organization	May 11, 2022	Request Update

STEP 18

Select a previously created template (if available)

The screenshot shows a dialog box titled "Export For Last updated Organization Report (19 Selected)". A light blue instruction box at the top states: "The left column presents all available fields for inclusion in the export. Drag fields from the left to the right to include them in the export. Additionally, utilize the buttons on the right to adjust the sequence of fields in your export." Below this, there is a "Template" dropdown menu with the text "Select Template" inside, which is highlighted with an orange border. To the right of the dropdown is a search bar labeled "Search in Available Fields" with a magnifying glass icon and a count of "(5)". Below the search bar is a list of fields: "Added General", "Last Updated General", "Organization Type General", "Status General", and "Tags General". To the right of this list are navigation buttons: a double right arrow, a single right arrow, a single left arrow, and a double left arrow. Further right is a "Selected Fields" section with a count of "(2)", containing "Organization Lead General" and "Name General". At the bottom of the dialog are three buttons: "Update Template", "Save as New Template", and "Download File".

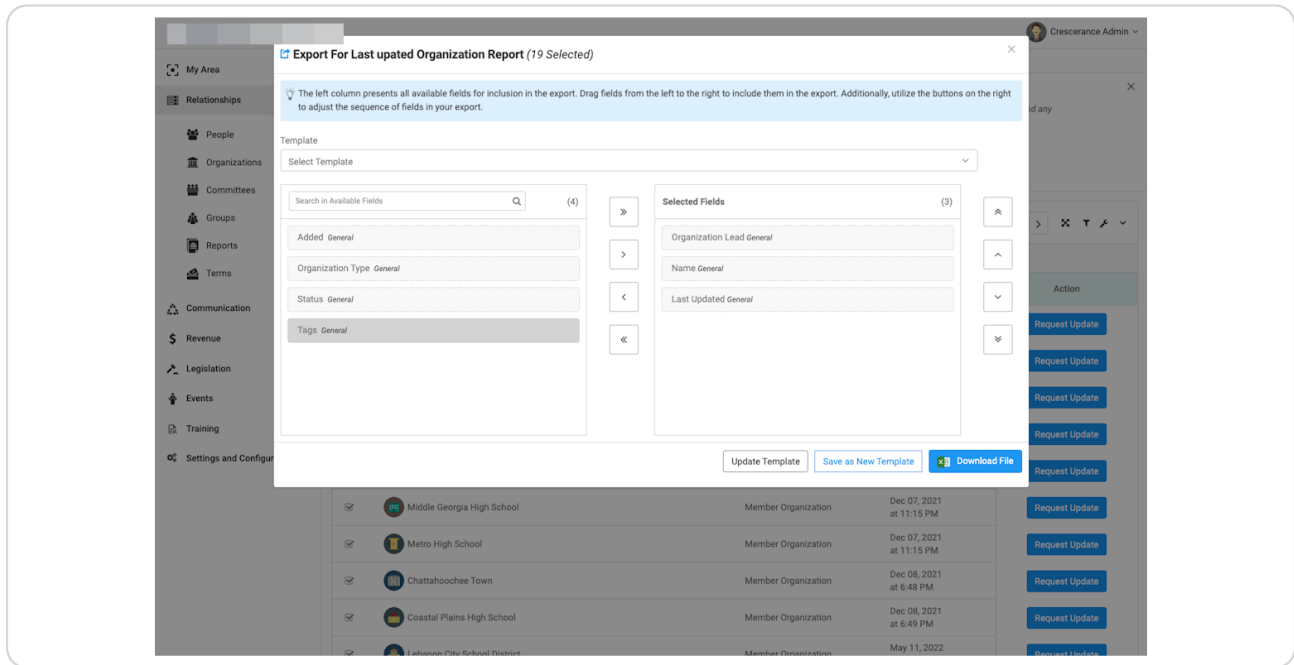
STEP 19

Begin typing field criteria and drag over to right box

The screenshot shows the same dialog box as in Step 18. The "Search in Available Fields" search bar is now highlighted with an orange border. The list of available fields remains the same: "Added General", "Last Updated General", "Organization Type General", "Status General", and "Tags General". The "Selected Fields" section is currently empty. The navigation buttons and other elements of the dialog are the same as in the previous step.

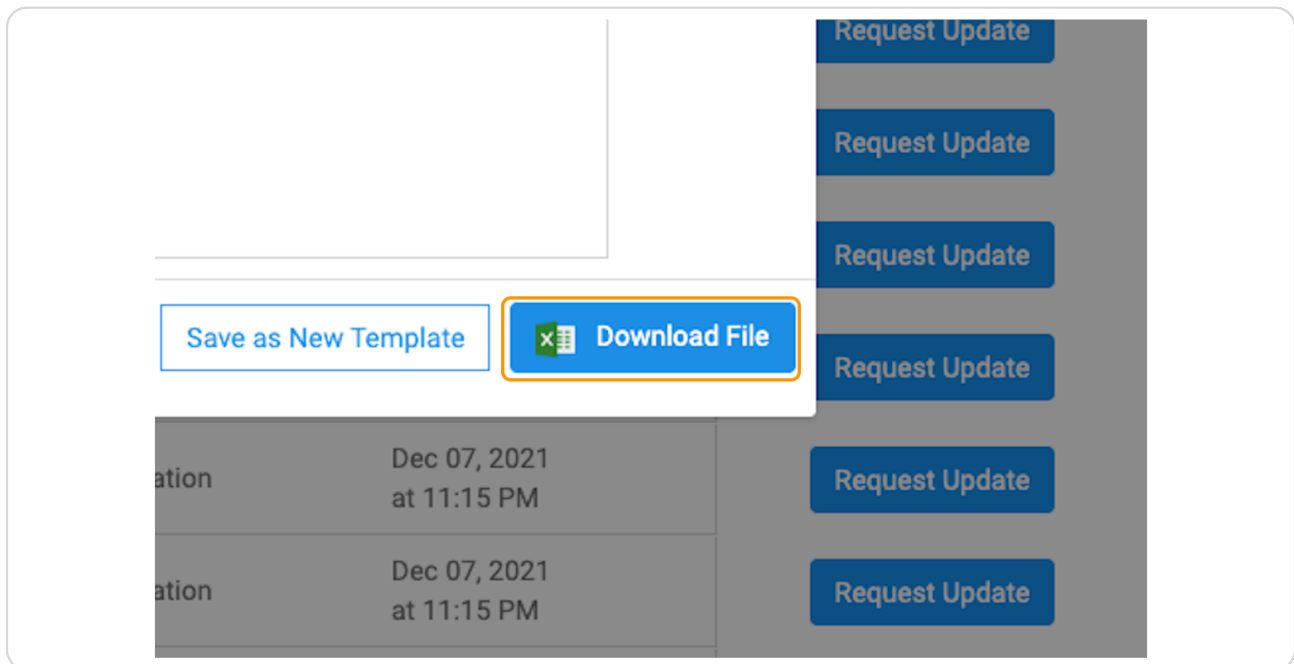
STEP 20

Drag highlighted option



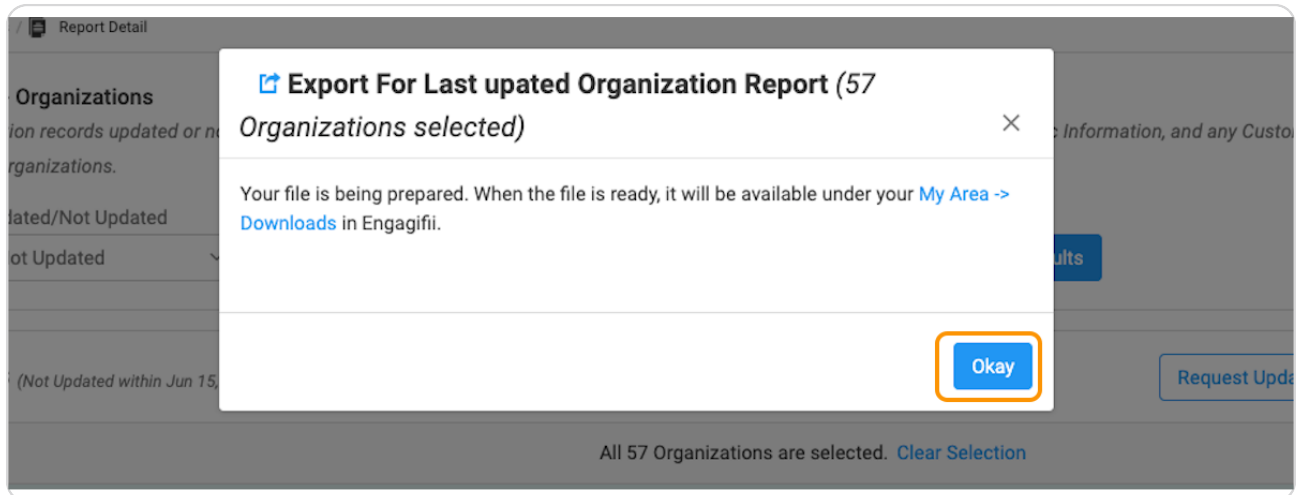
STEP 21

Click on Download File when finished making selections



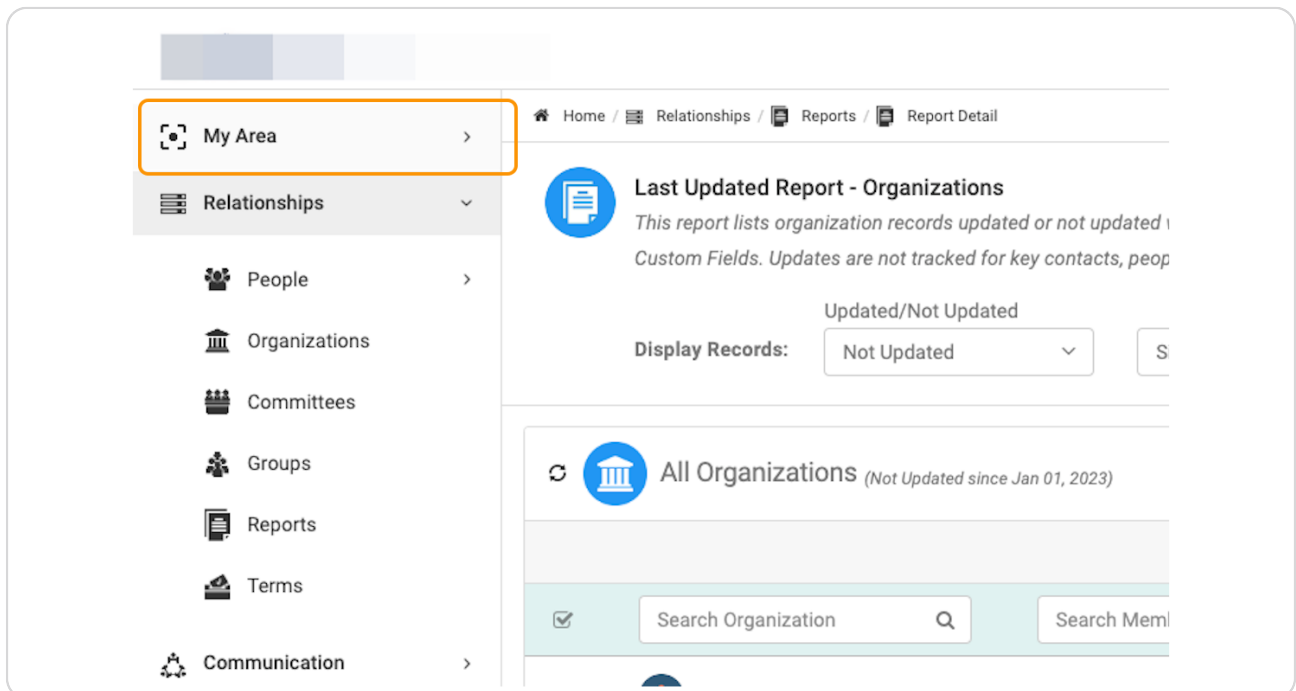
STEP 22

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



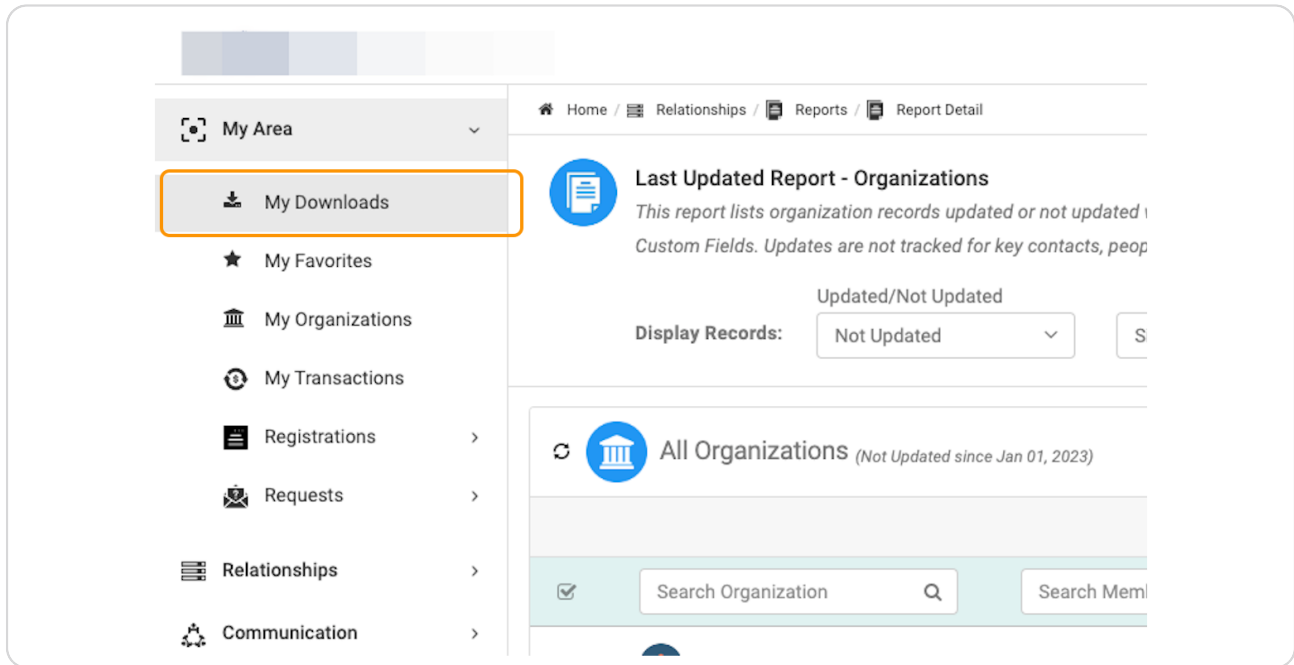
STEP 23

Click on My Area



STEP 24

Click on My Downloads



STEP 25

Click on your report

