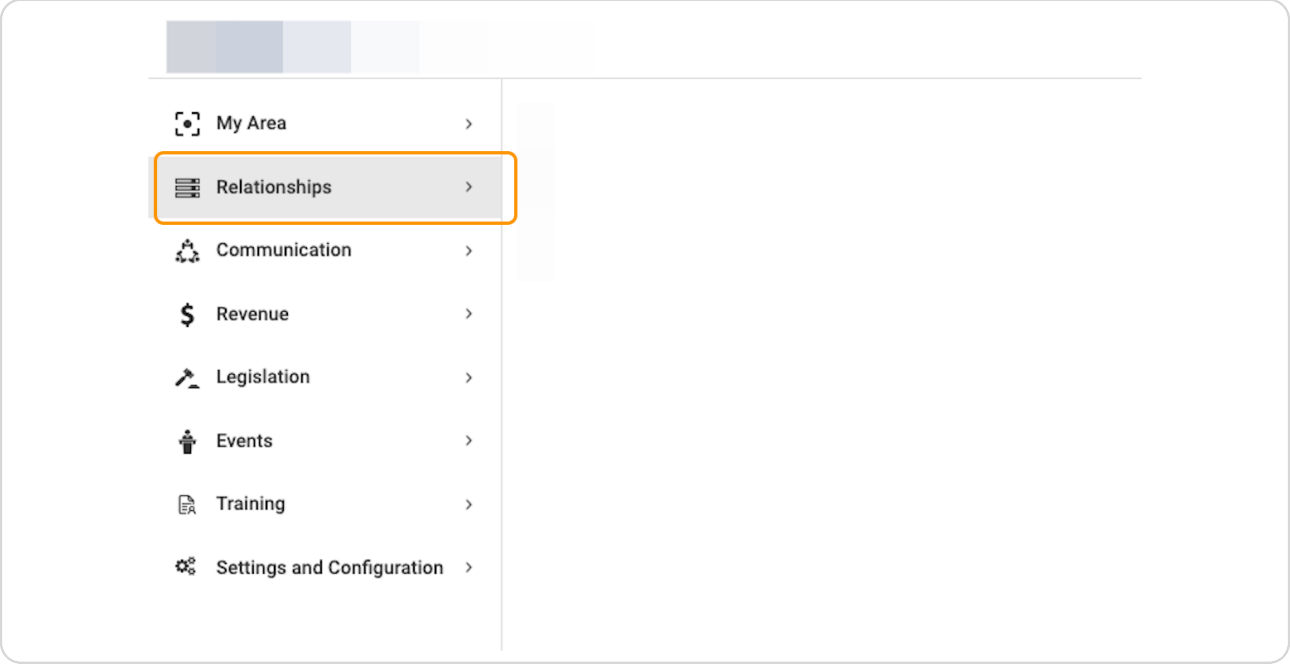
Last Updated Reports - People

27 Steps View most recent version

Created by	Creation Date	Last Updated
Engagifii Inc.	Sep 12, 2024	Sep 13, 2024

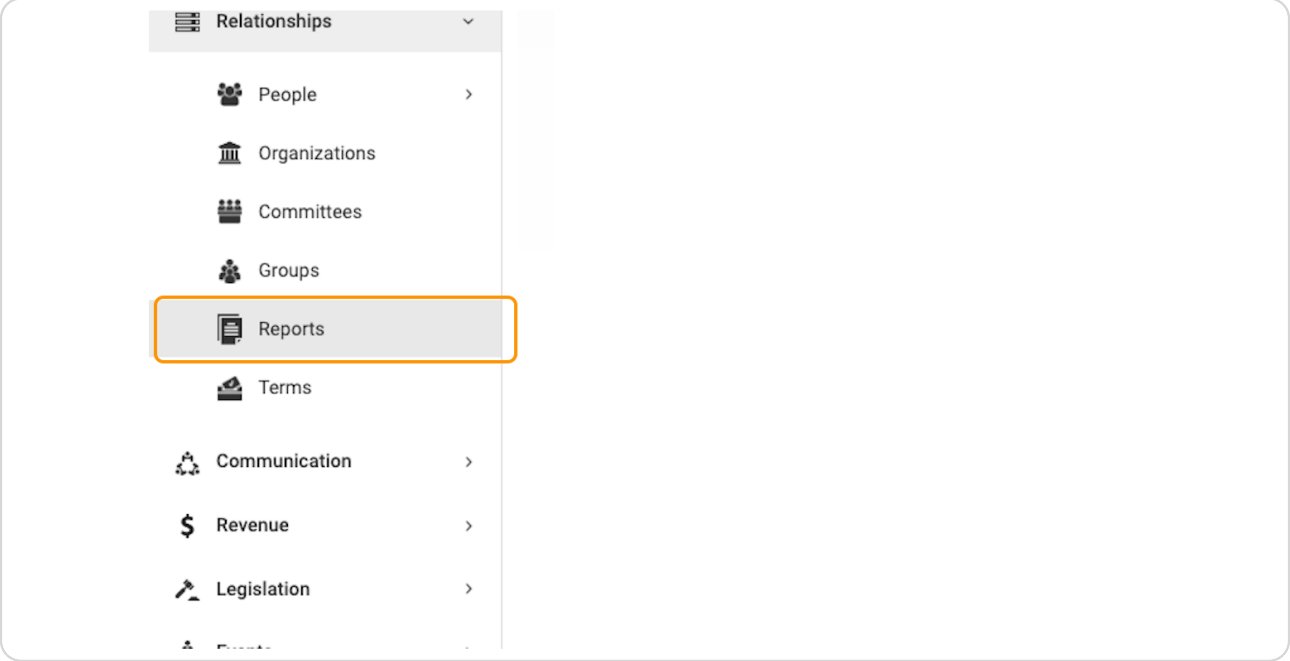
STEP 1

Click on Relationships



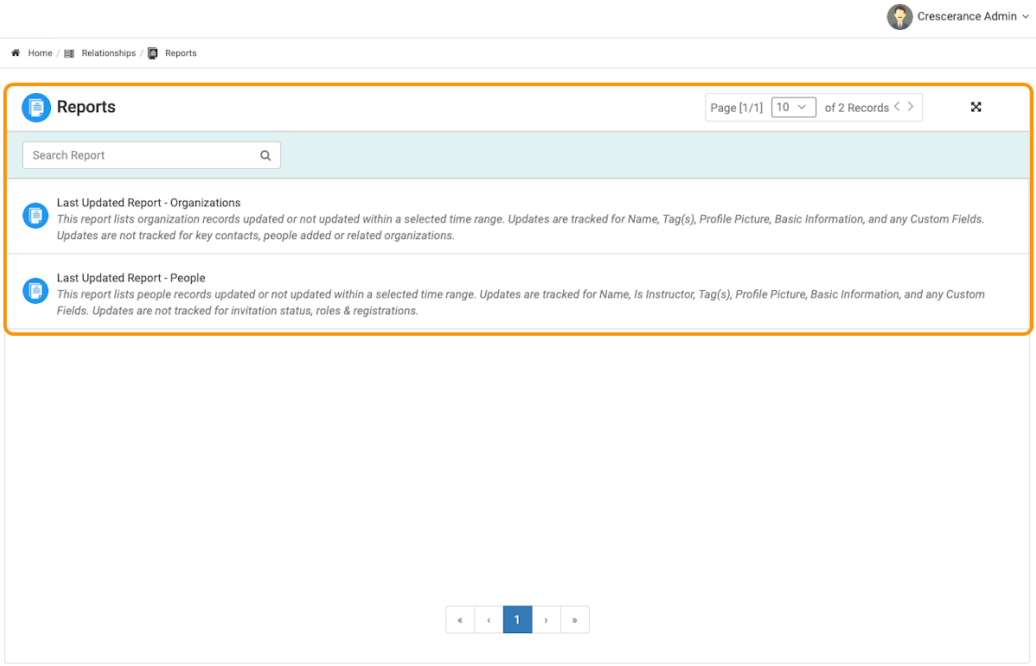
STEP 2

Click on Reports



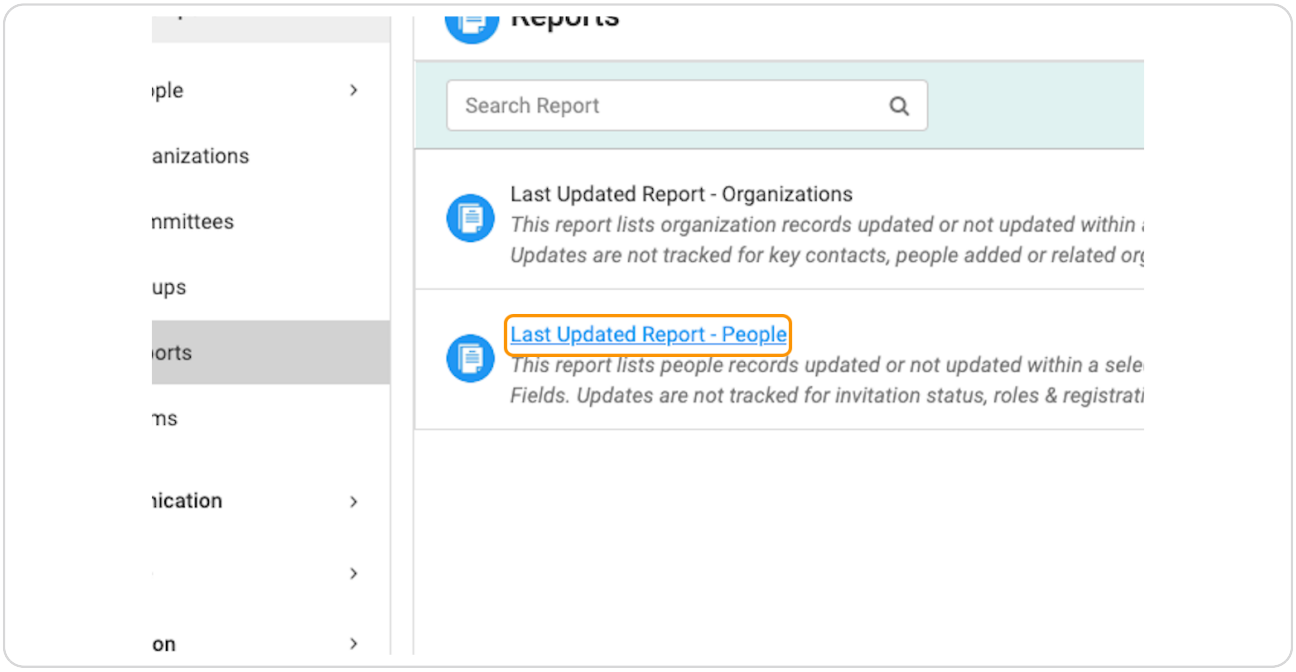
STEP 3

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



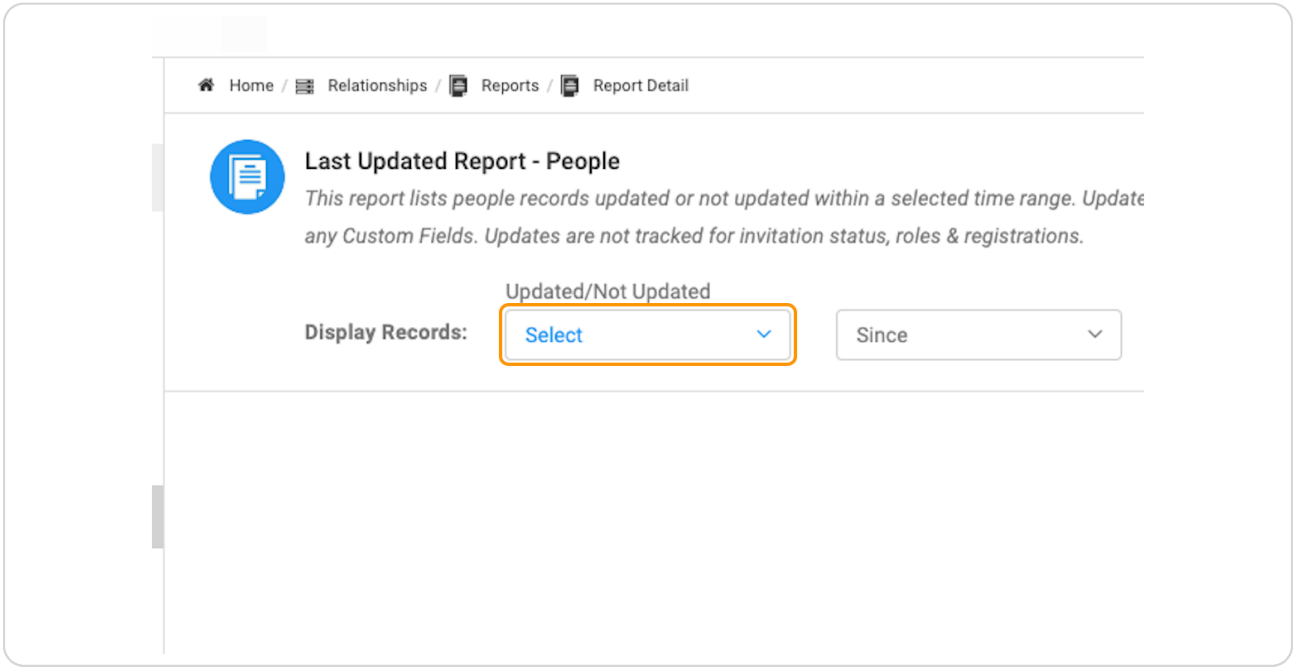
STEP 4

Let's look at the Last Updated Report - People



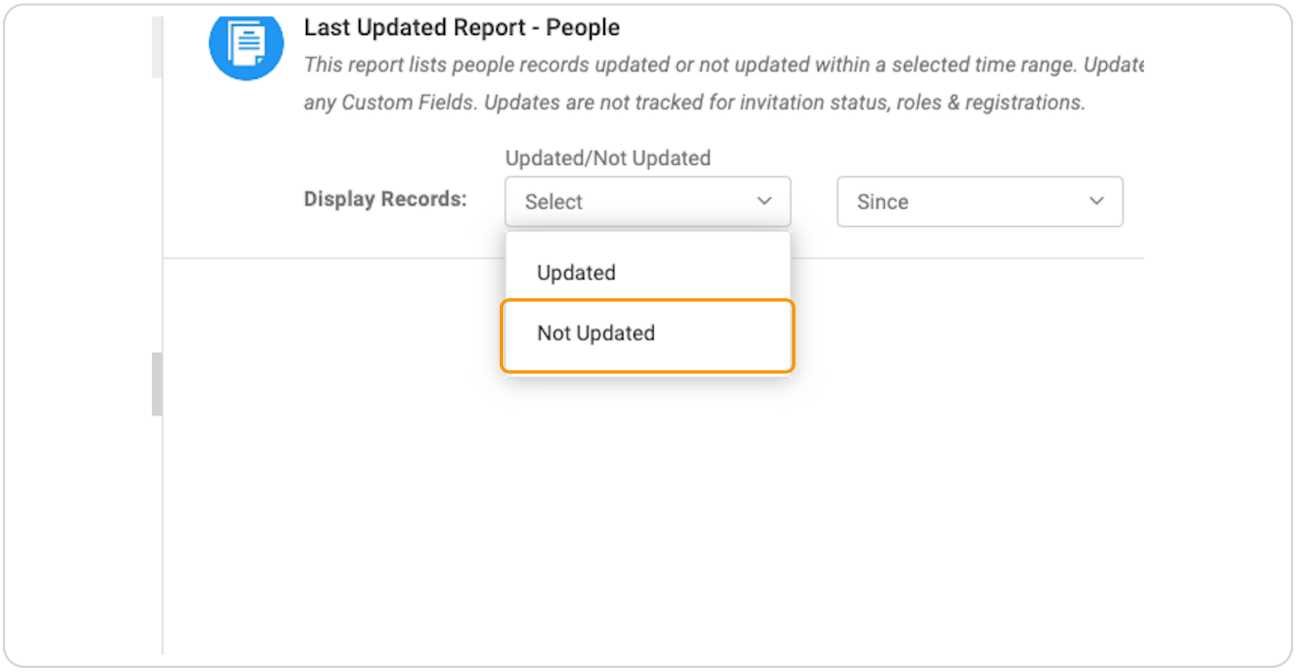
STEP 5

Click on Select to begin creating your report criteria



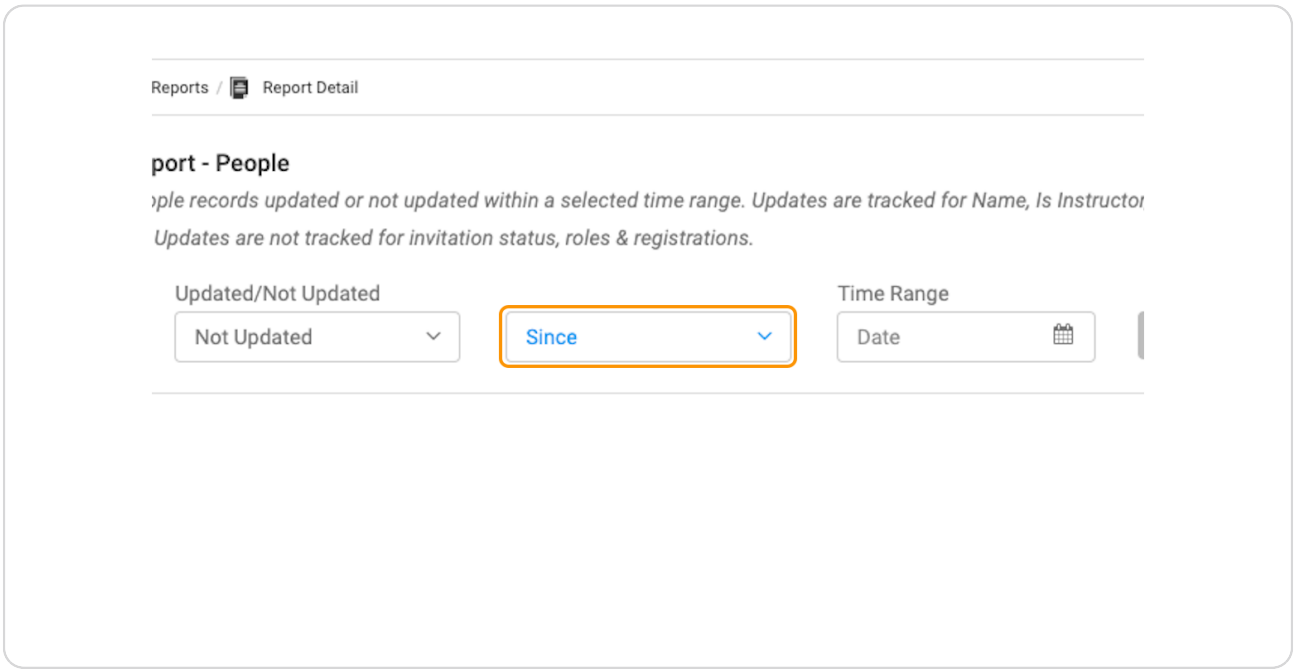
STEP 6

Make your desired selections



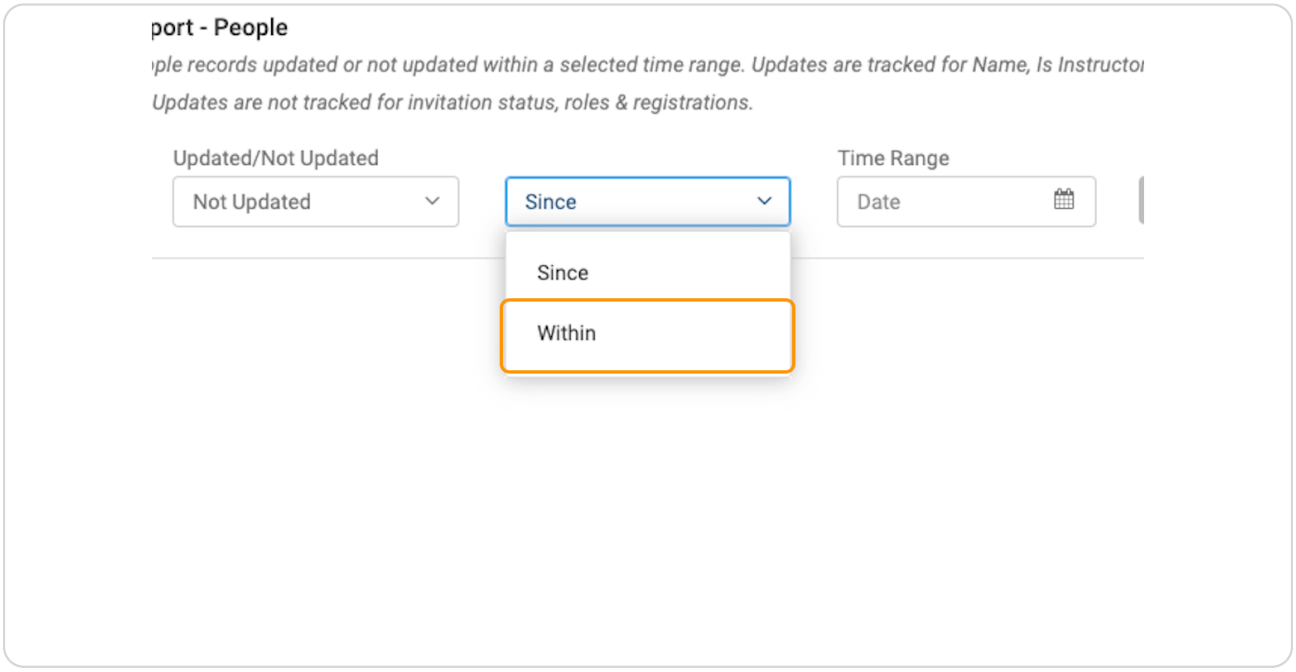
STEP 7

Click on Since to narrow parameters



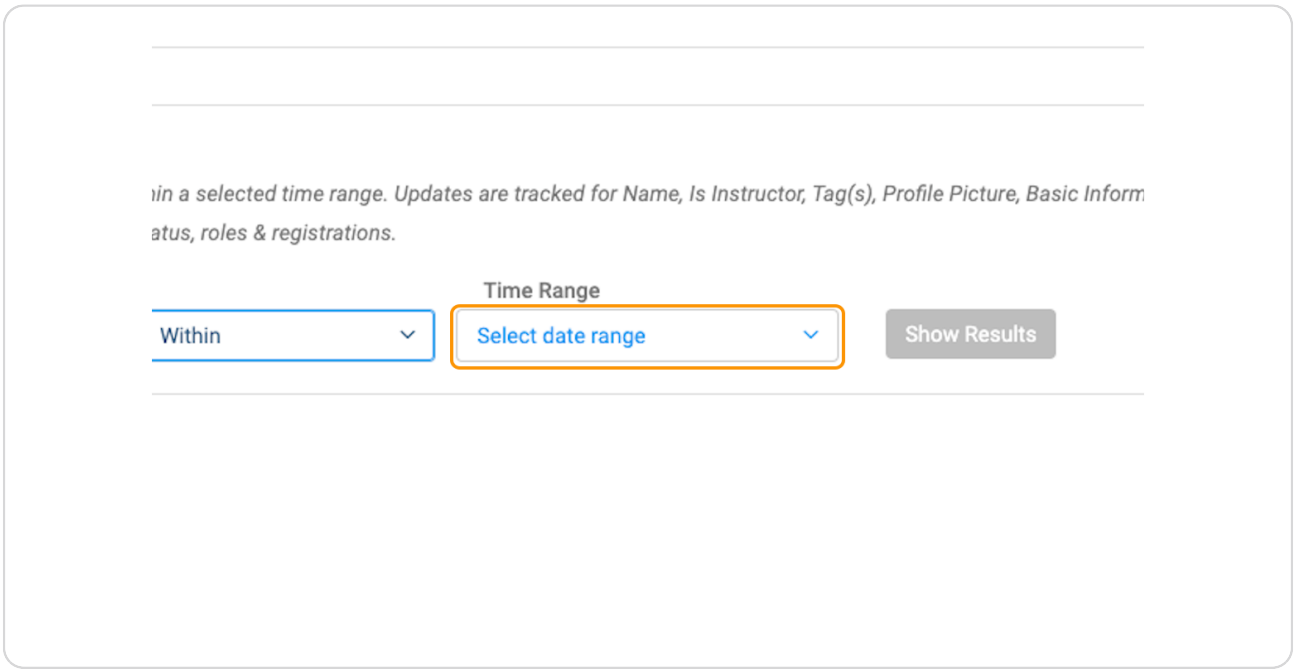
STEP 8

Click on Within



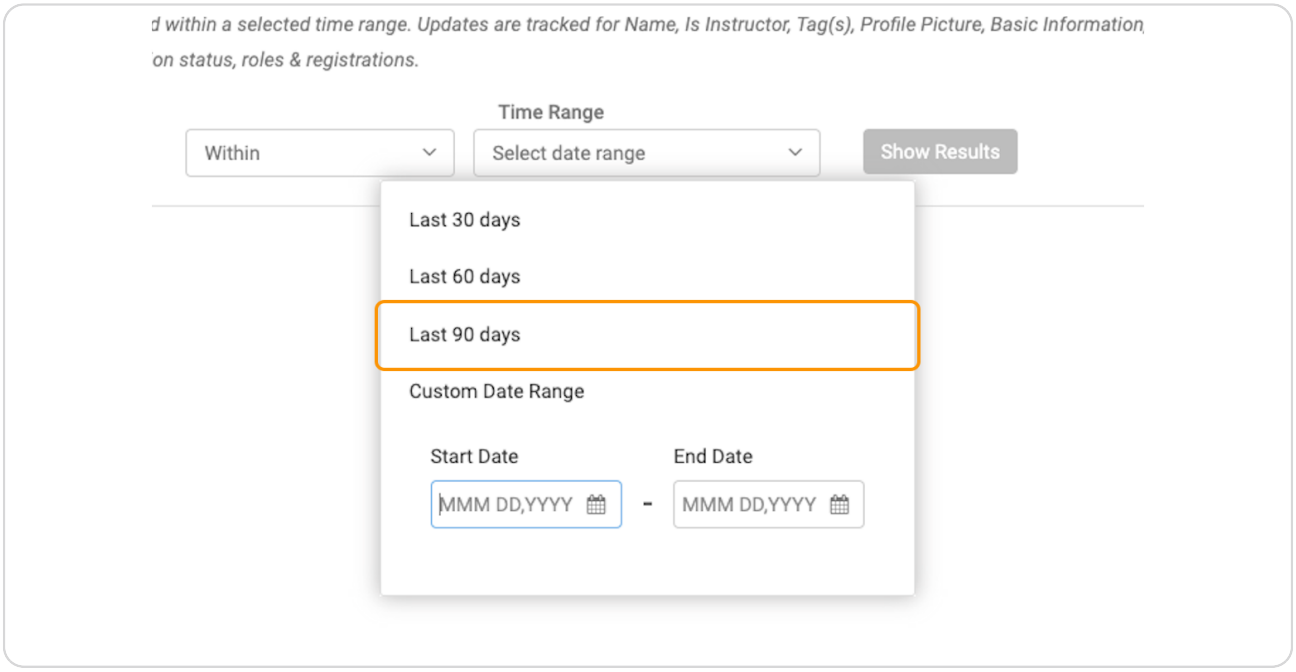
STEP 9

Click on Select date range



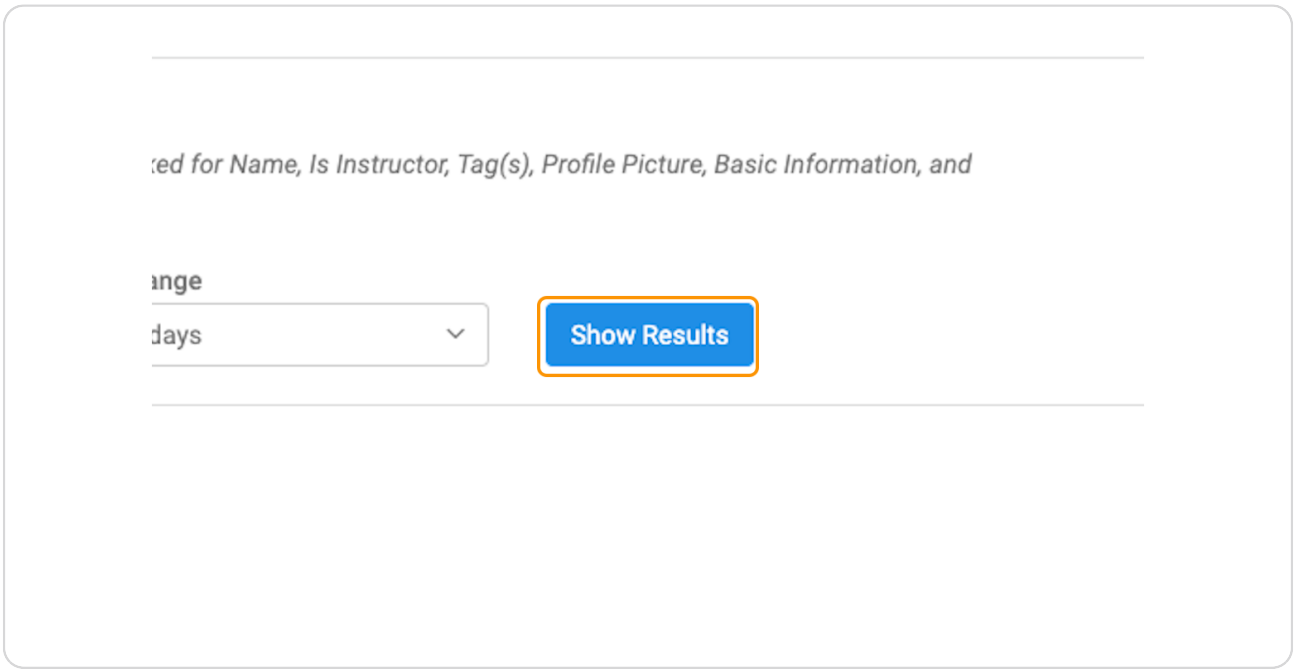
STEP 10

Click on Last 90 days



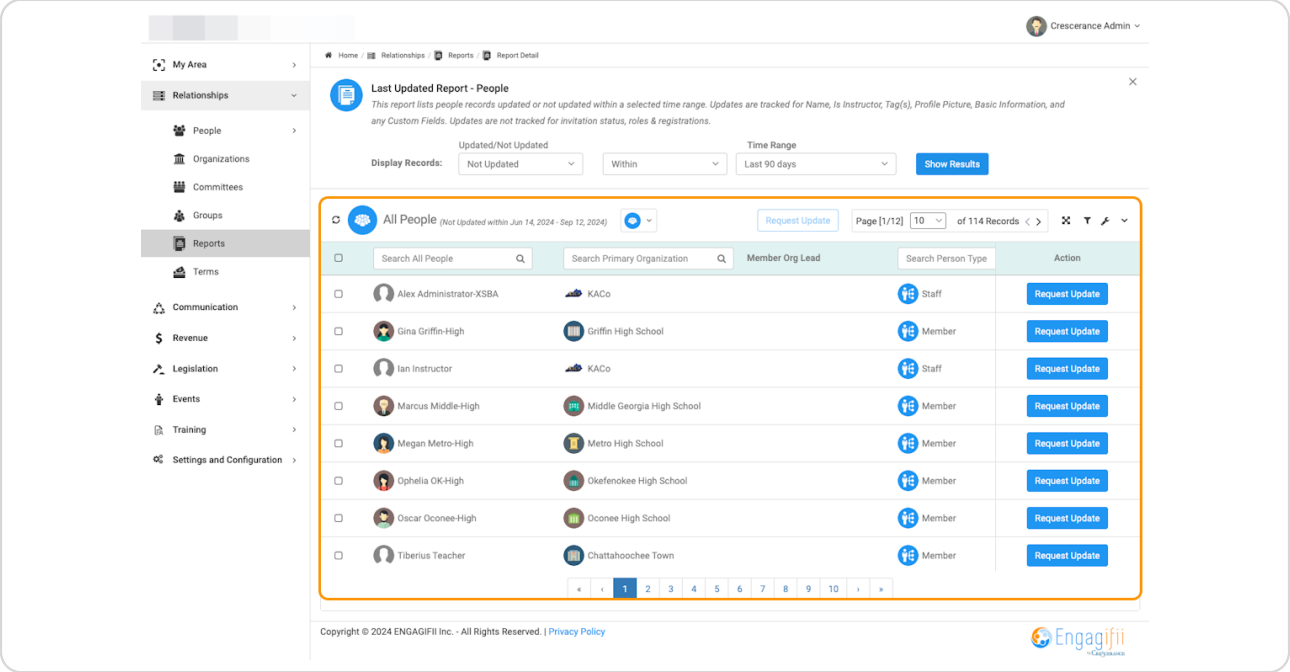
STEP 11

Click on Show Results when finished making selections



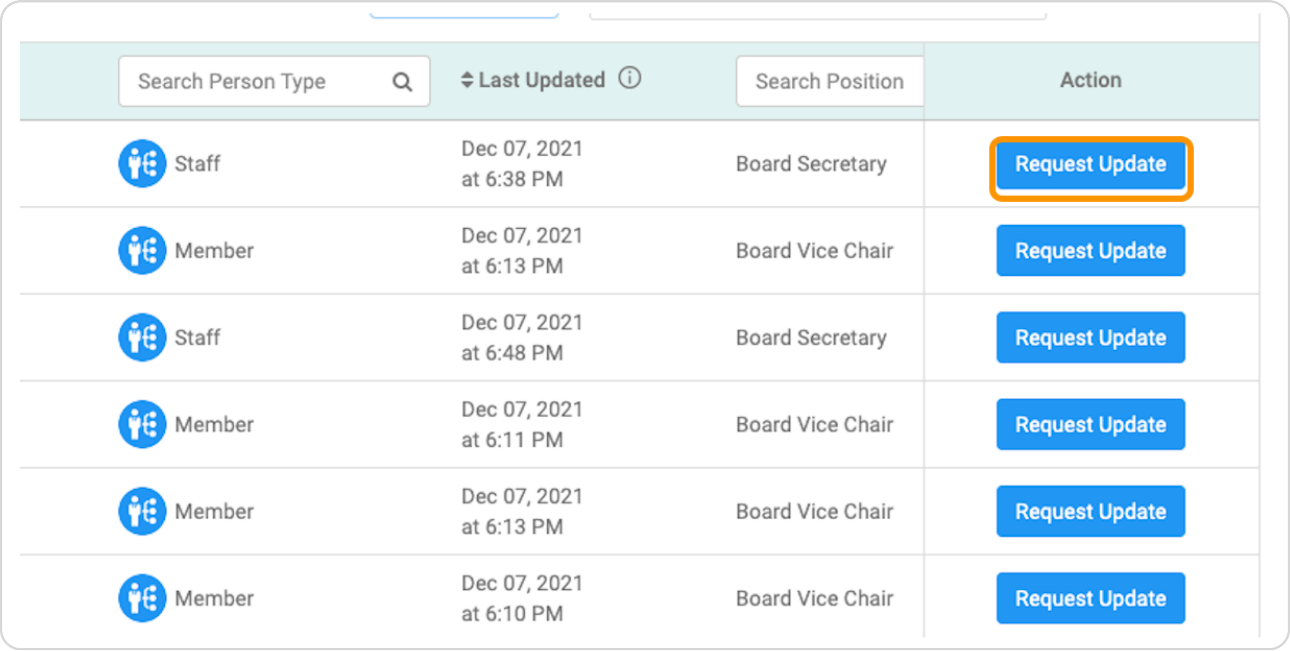
STEP 12

A list of all the people who fall into the set parameters will now appear.



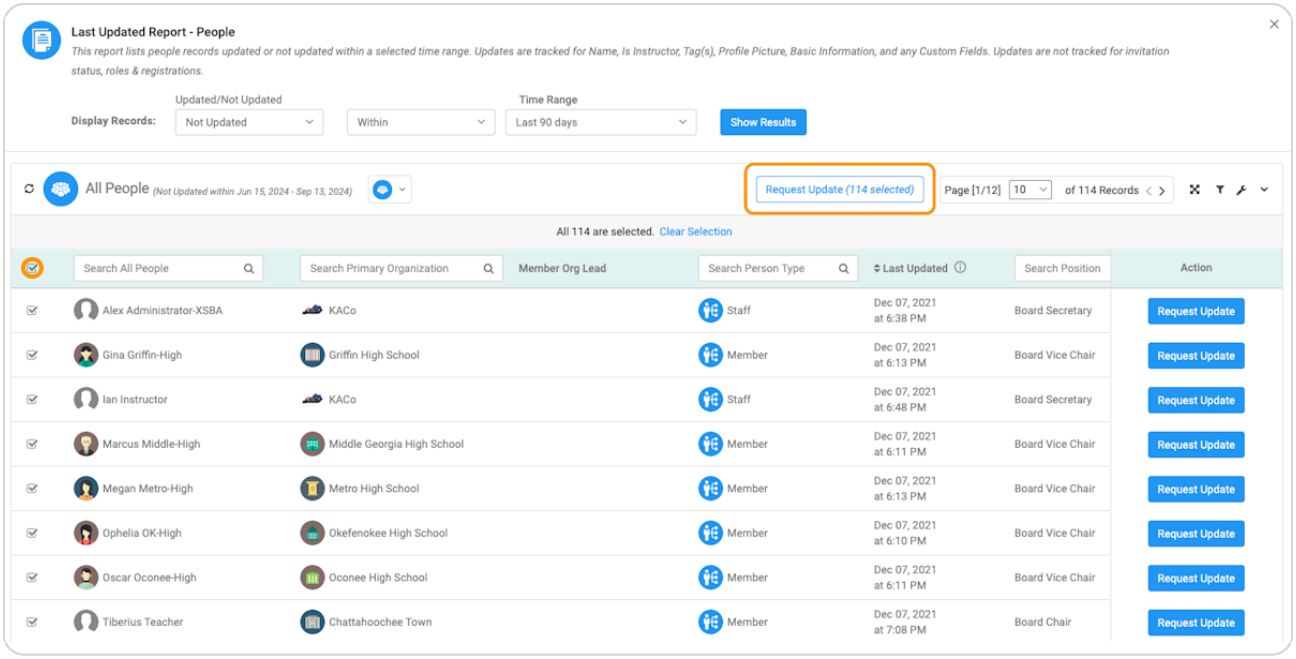
STEP 13

Click on Request Update to send an email requesting an individual update



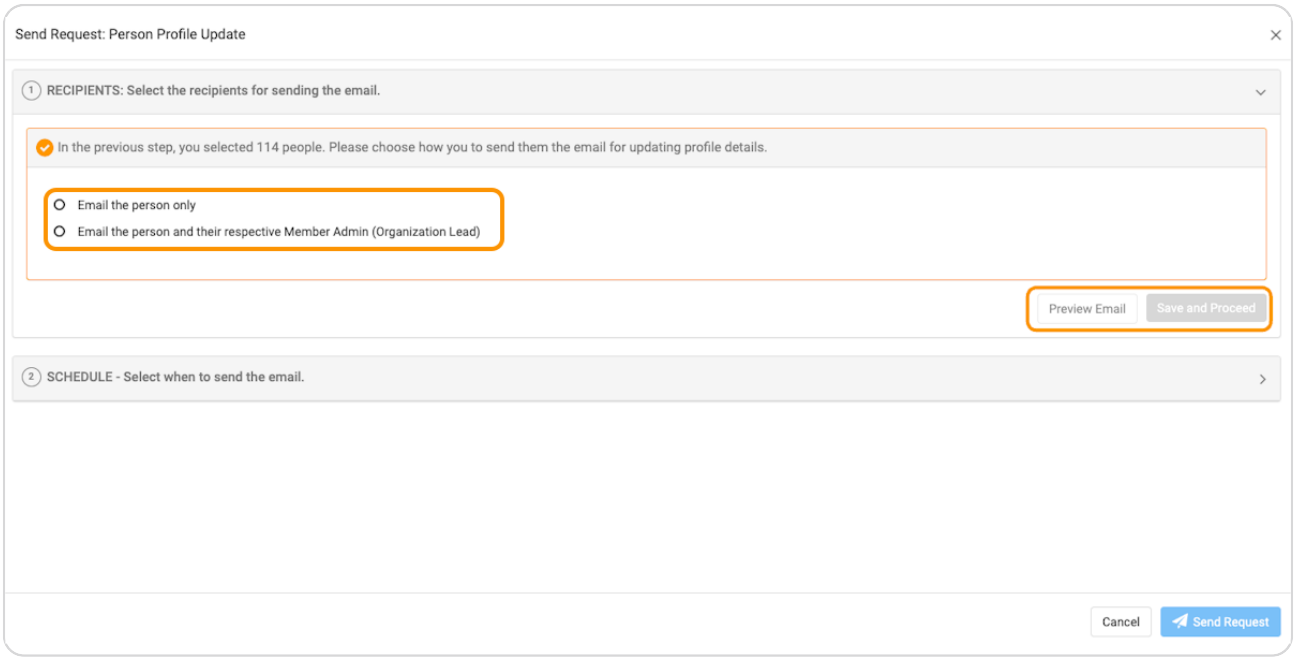
STEP 14

Or select all to send a mass update request



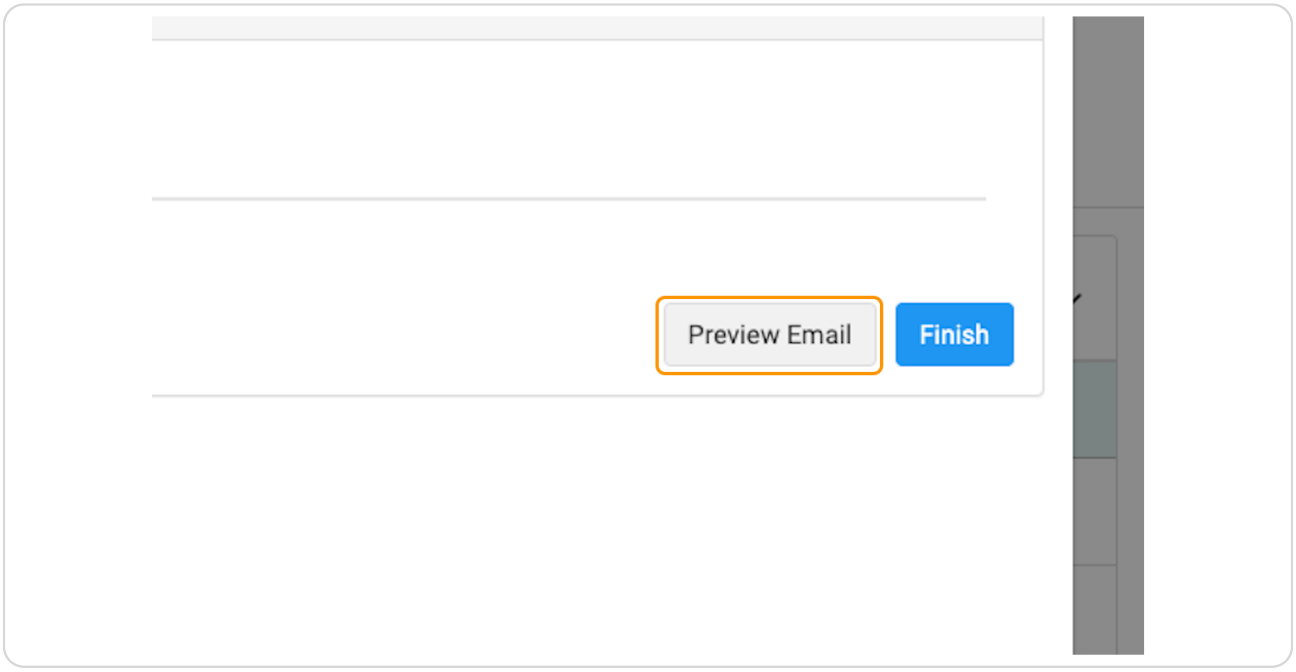
STEP 15

Select email recipients



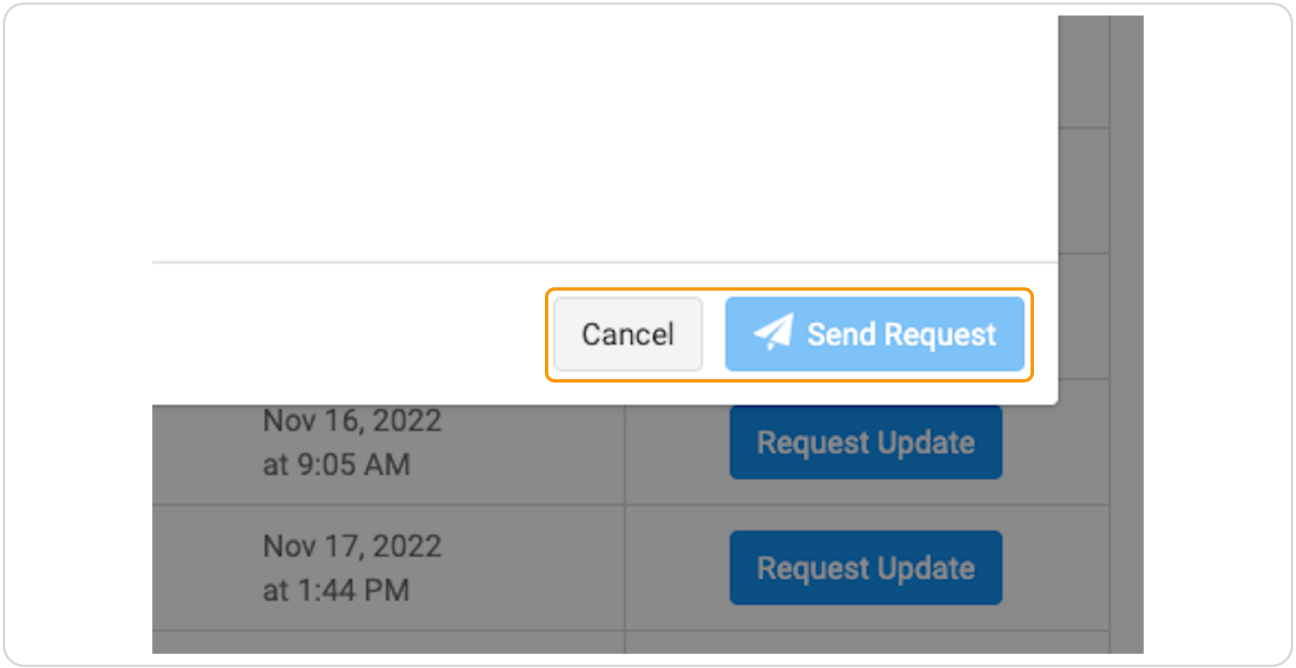
STEP 16

Click on Preview Email



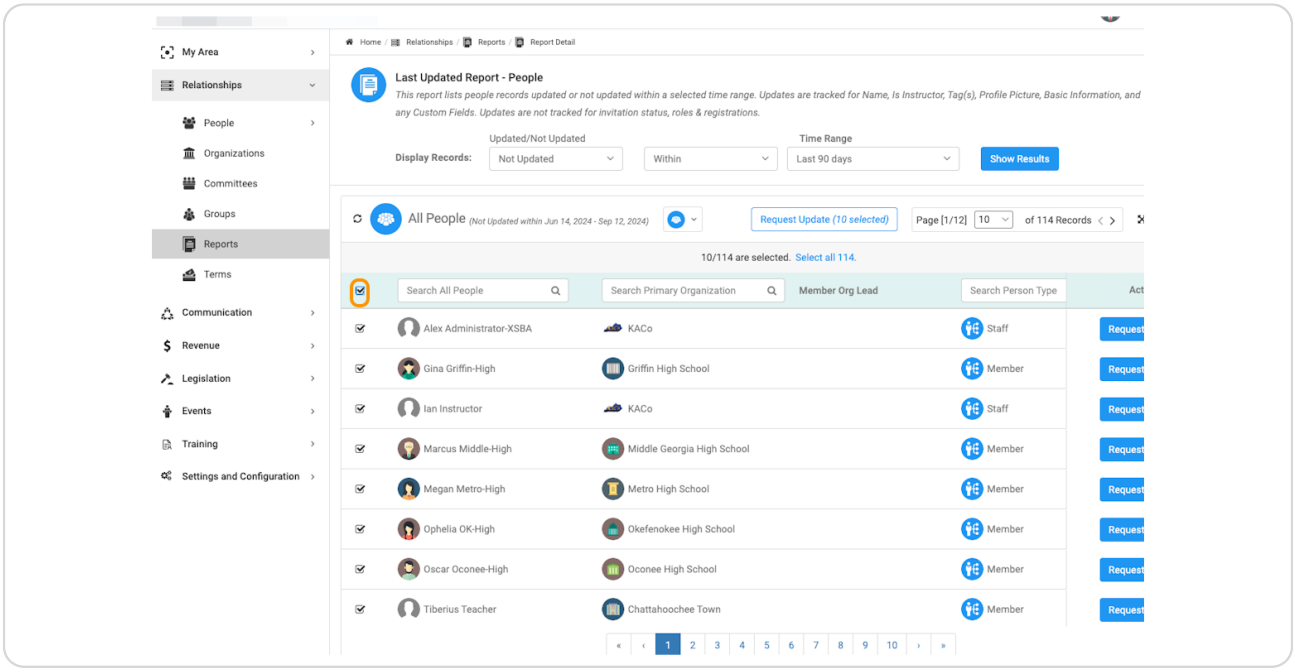
STEP 17

Click on Cancel or Send Request when finished



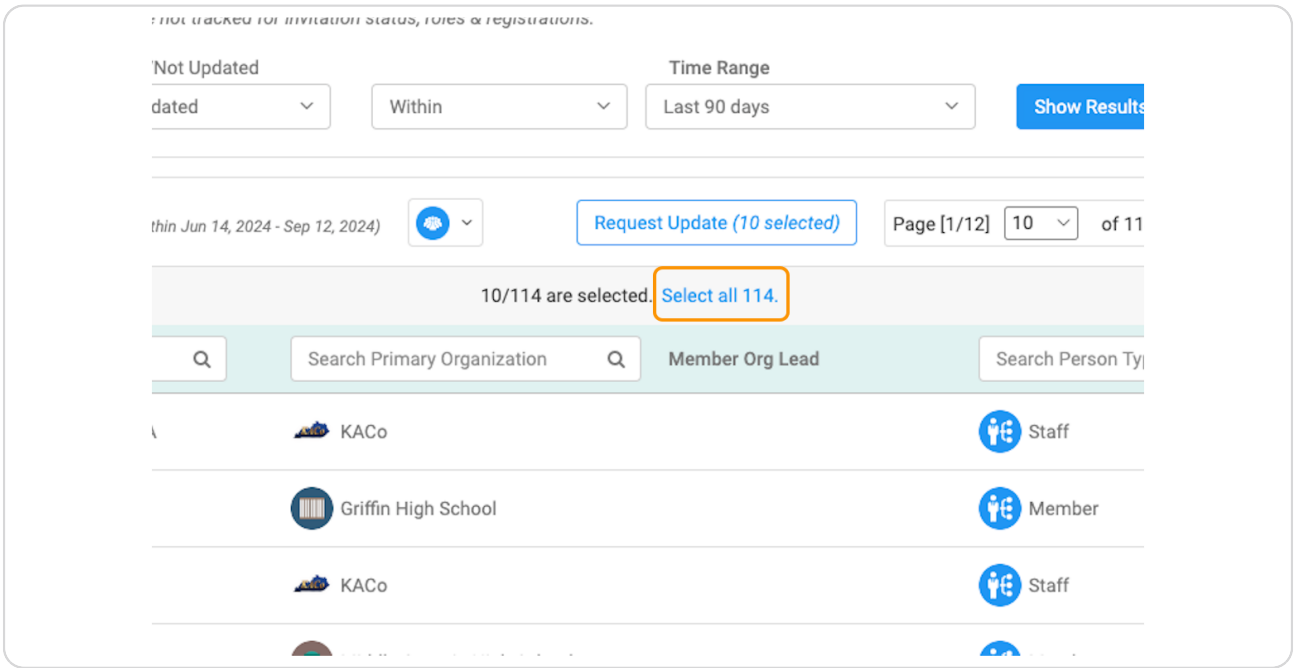
STEP 18

To export a report, check the box to select all people



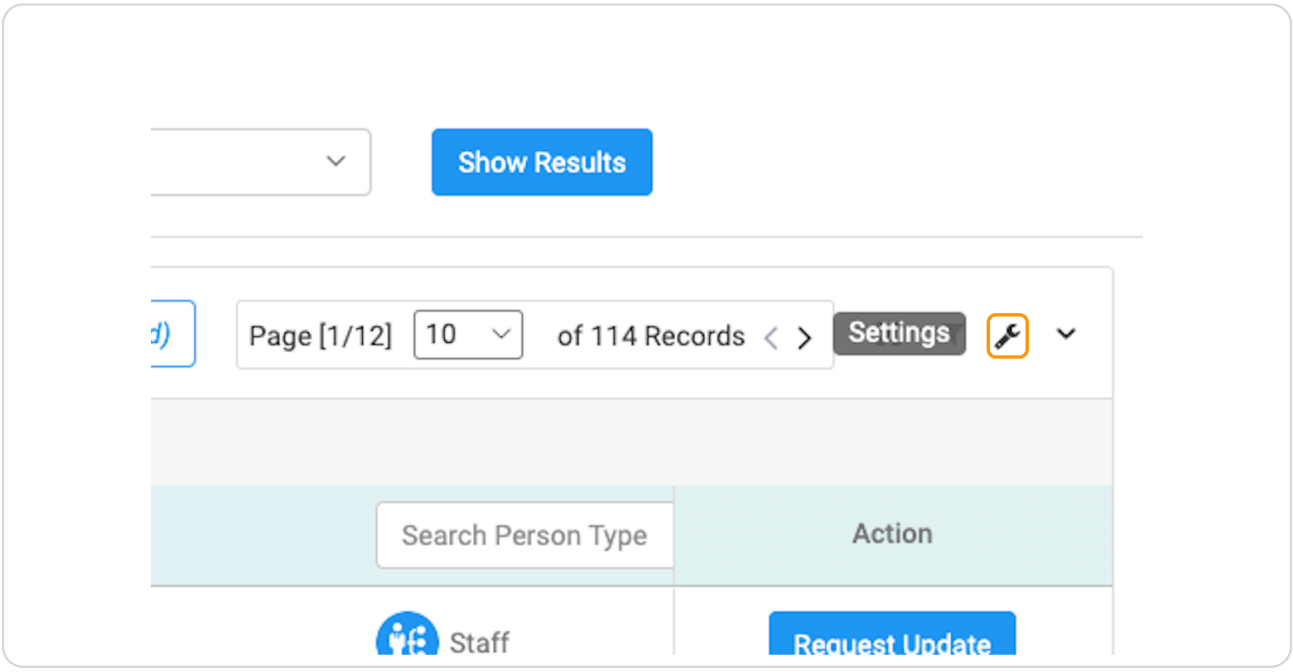
STEP 19

And make sure you select all to be exported



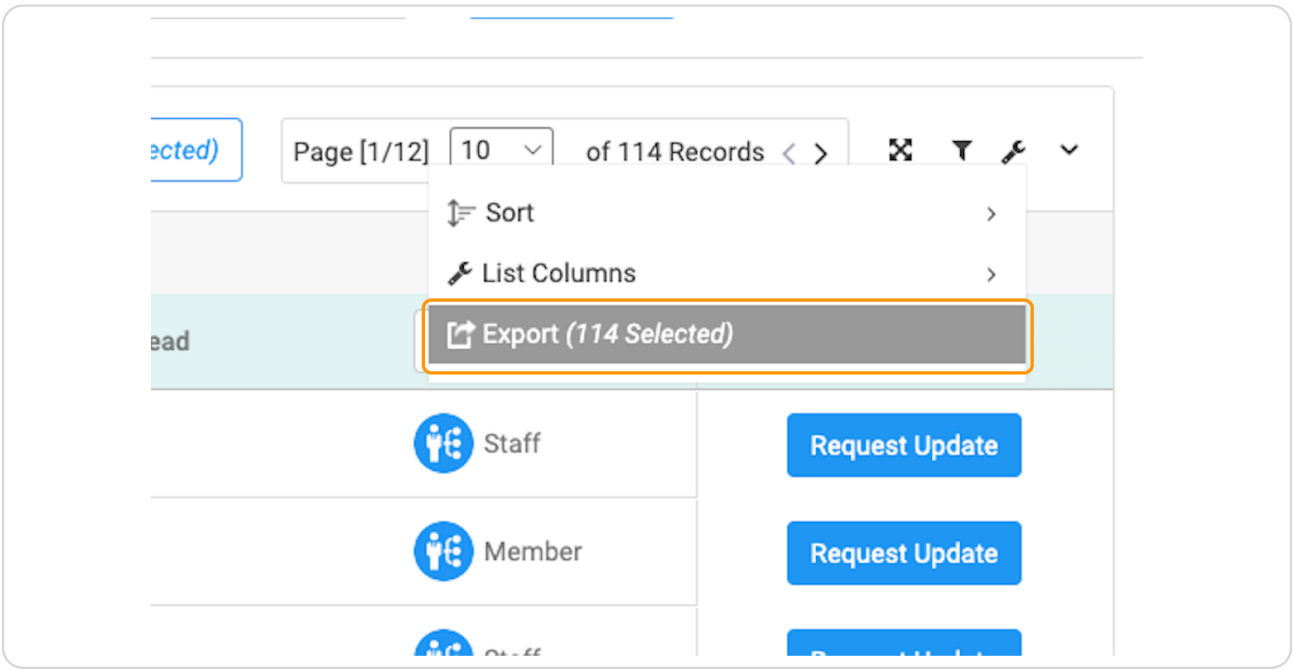
STEP 20

Click on the wrench icon to access the Settings



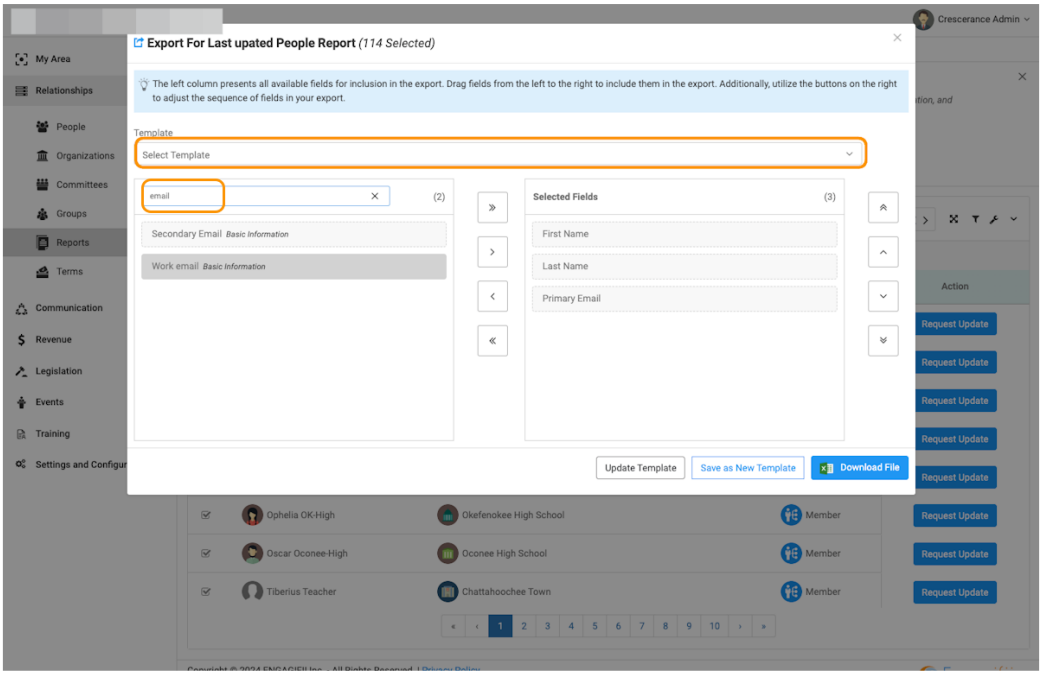
STEP 21

Click on Export (114 Selected)



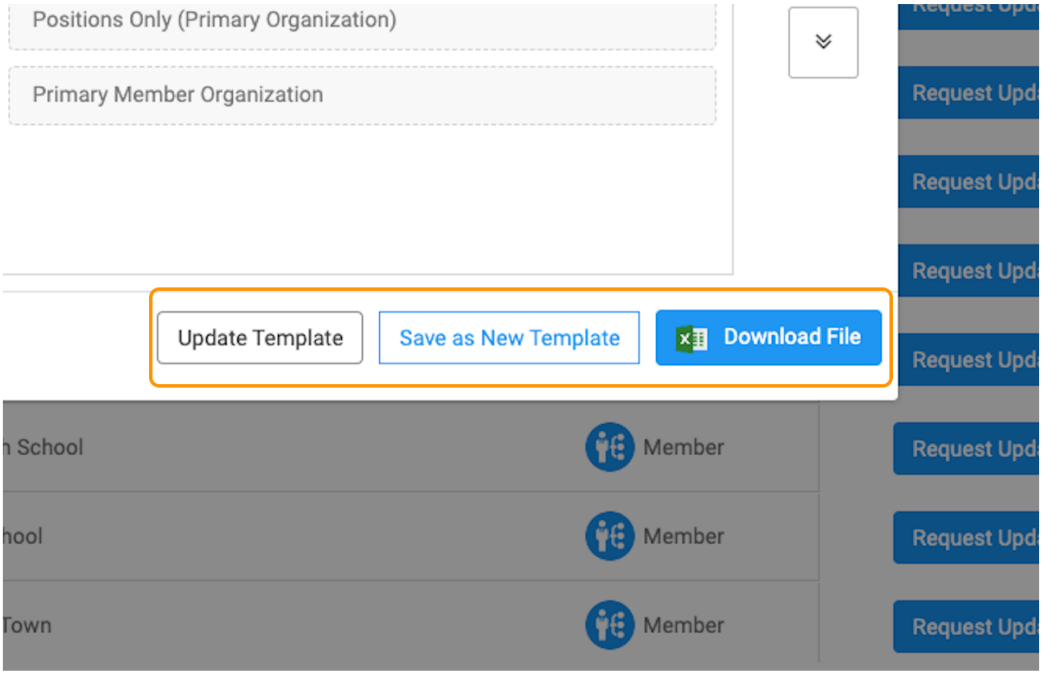
STEP 22

Select and drag the fields you want on your report or if you've previously created a report template, chose that.



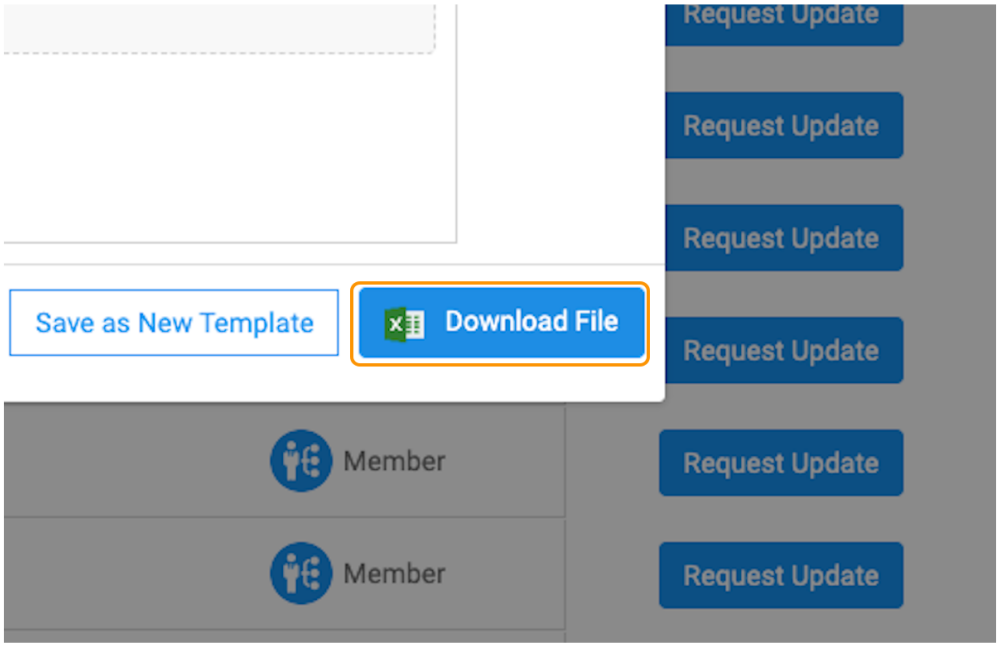
STEP 23

Once finished, you can either update an existing template, save as a new template or just download a one off report.



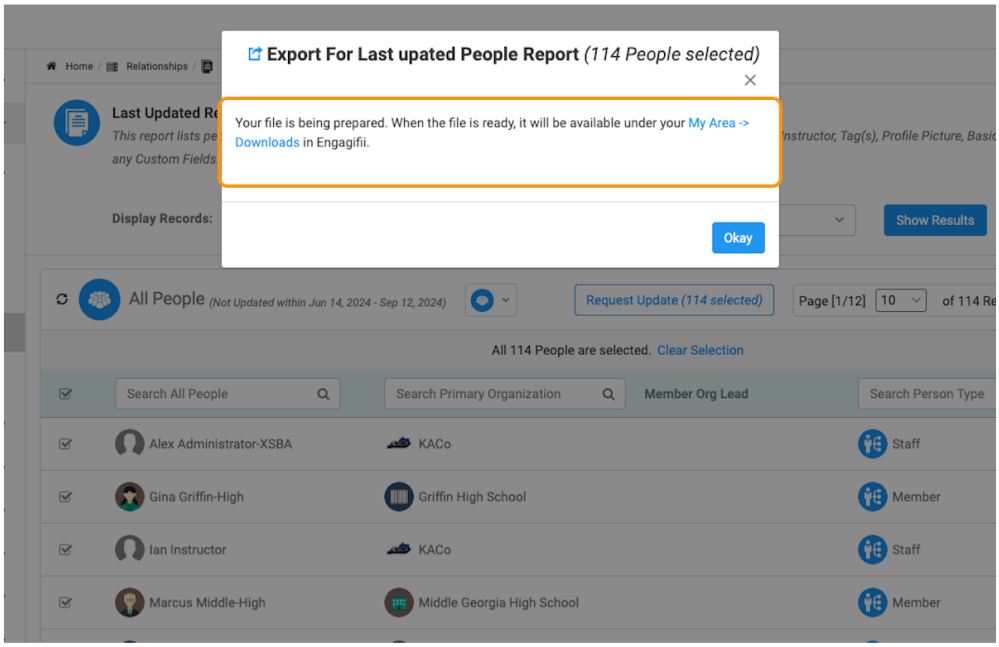
STEP 24

Click on Download File



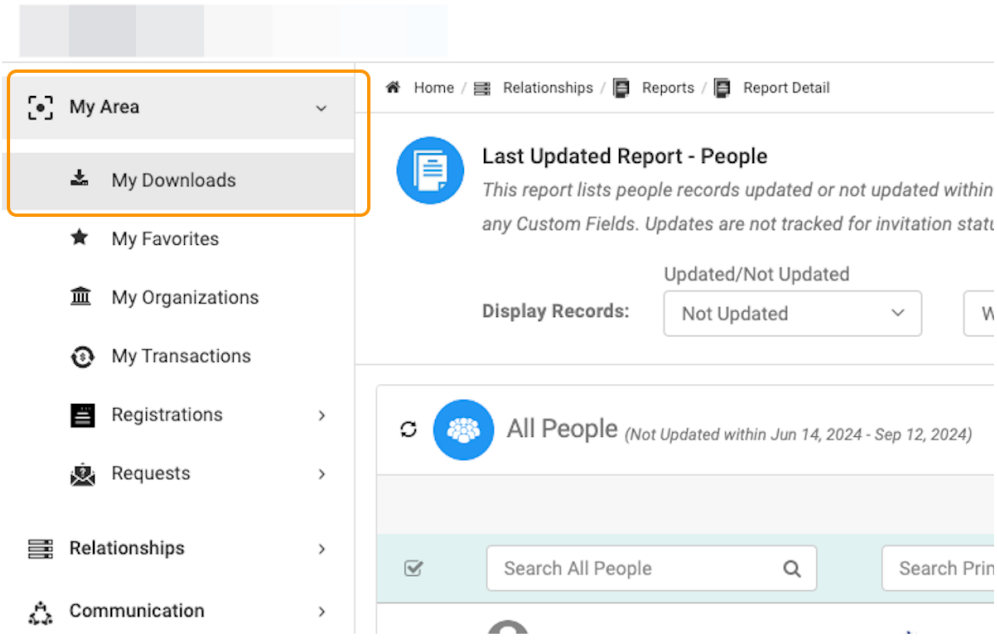
STEP 25

Your report will be available in the My Area / My Downloads Area



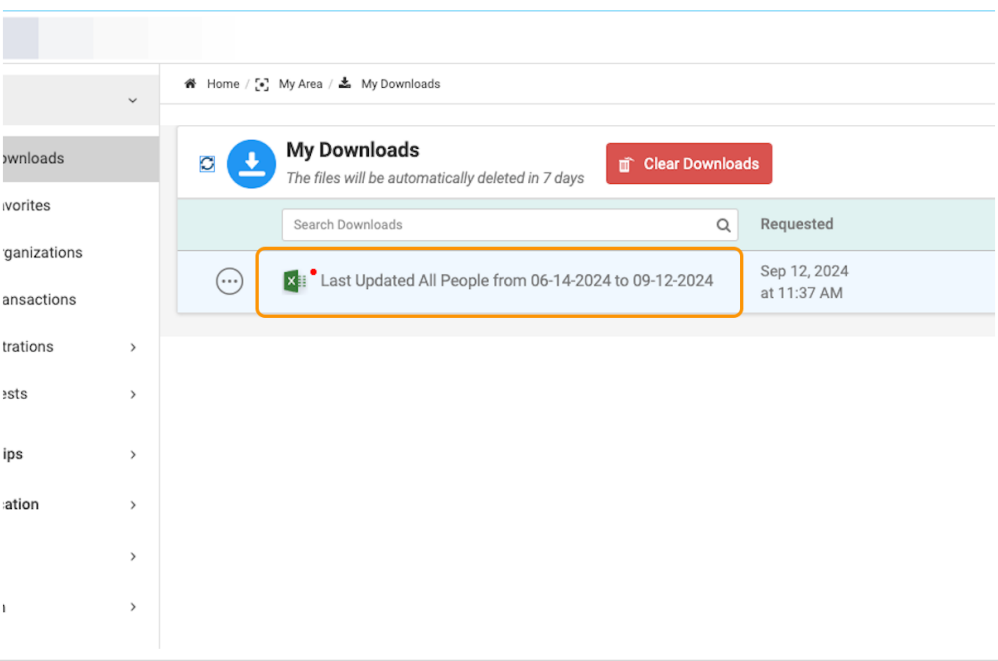
STEP 26

Click on My Downloads



STEP 27

Click on your report to view



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