

Navigating the Organization Profile

21 Steps [View most recent version](#) 

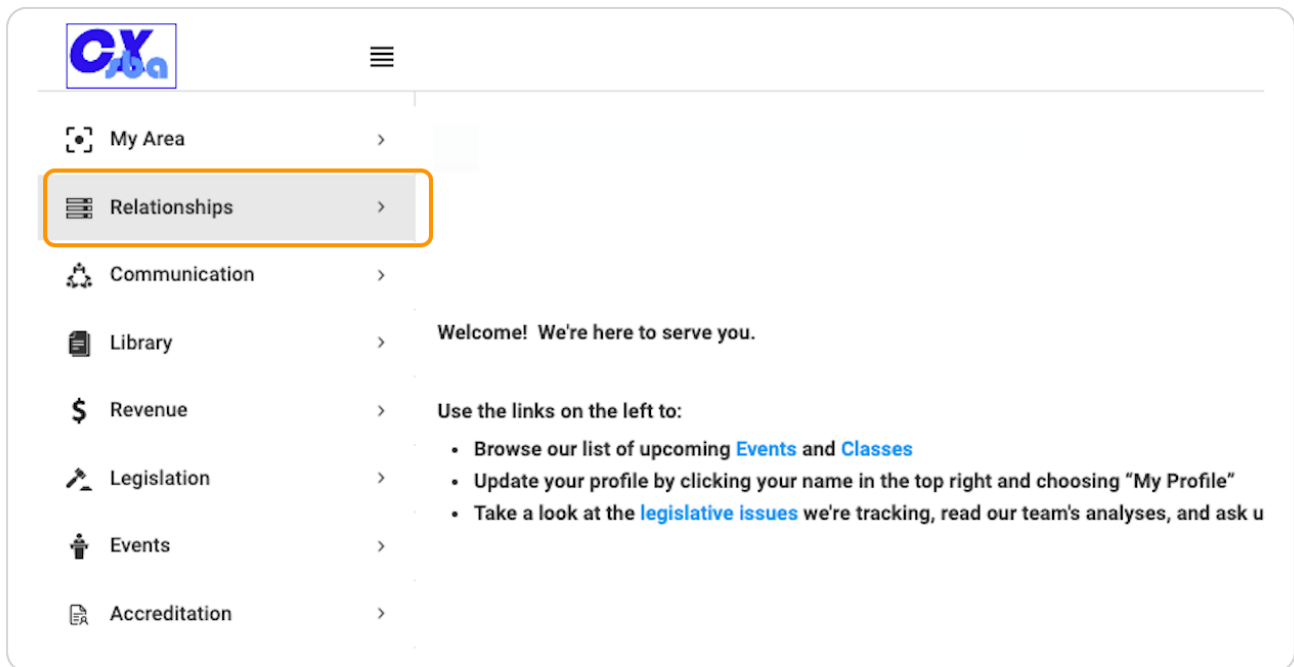
Created by
Engagifii Inc.

Creation Date
November 1, 2023

Last Updated
November 1, 2023

STEP 1

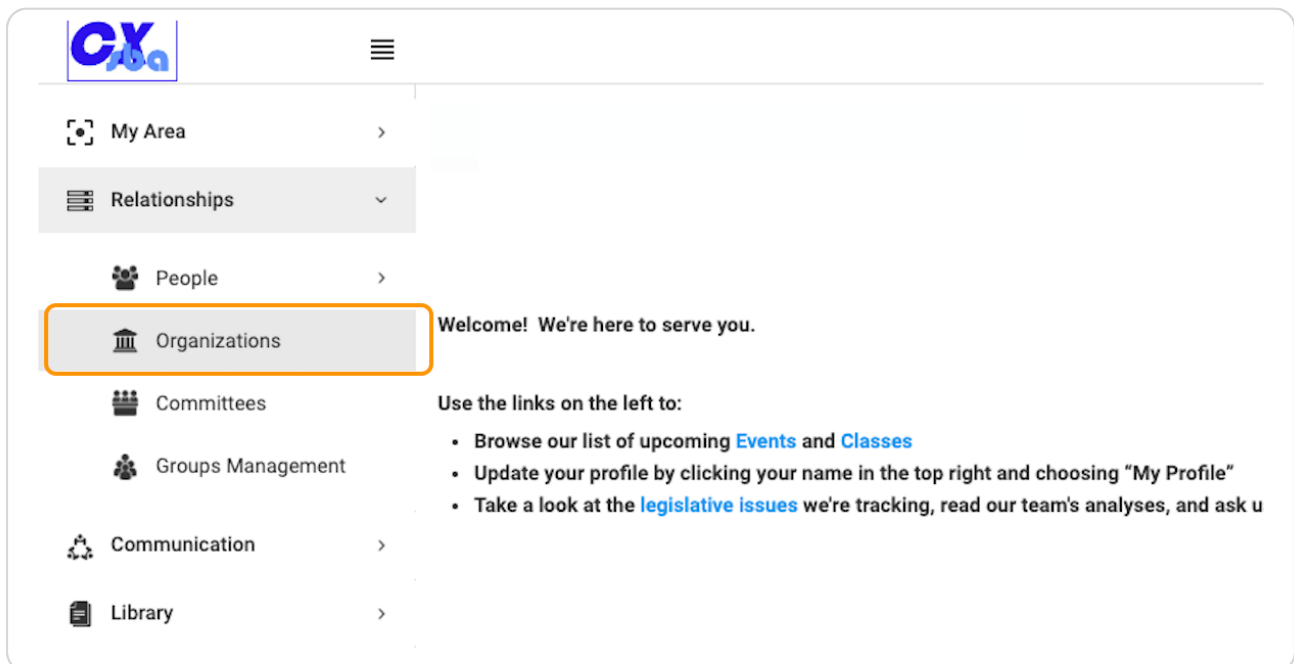
Click on Relationships



The screenshot shows the top navigation bar of the CX website. The logo 'CX' is in the top left, and a hamburger menu icon is in the top right. Below the logo, a list of navigation items is displayed: 'My Area', 'Relationships', 'Communication', 'Library', 'Revenue', 'Legislation', 'Events', and 'Accreditation'. The 'Relationships' item is highlighted with an orange border. To the right of the navigation menu, a welcome message reads: 'Welcome! We're here to serve you.' Below this, a section titled 'Use the links on the left to:' contains three bullet points: 'Browse our list of upcoming [Events](#) and [Classes](#)', 'Update your profile by clicking your name in the top right and choosing "My Profile"', and 'Take a look at the [legislative issues](#) we're tracking, read our team's analyses, and ask u

STEP 2

Click on Organizations



The screenshot shows the top navigation bar of the CX website. The logo 'CX' is in the top left, and a hamburger menu icon is in the top right. Below the logo, a list of navigation items is displayed: 'My Area', 'Relationships', 'People', 'Organizations', 'Committees', 'Groups Management', 'Communication', and 'Library'. The 'Organizations' item is highlighted with an orange border. To the right of the navigation menu, a welcome message reads: 'Welcome! We're here to serve you.' Below this, a section titled 'Use the links on the left to:' contains three bullet points: 'Browse our list of upcoming [Events](#) and [Classes](#)', 'Update your profile by clicking your name in the top right and choosing "My Profile"', and 'Take a look at the [legislative issues](#) we're tracking, read our team's analyses, and ask u

STEP 3

Click on the star if you want to make this organization a favorite

The screenshot shows a sidebar menu on the left with the following items: People, Organizations (highlighted), Committees, Groups Management, Communication, Library, and Revenue. The main content area is titled 'Favorites' and has a search bar 'Search All Organizations'. Below the search bar is a list of organizations, each with a checkbox, a star icon, and a profile picture. The star icon for 'Blount County' is highlighted with an orange box. The other organizations listed are ACCA KACo, Colbert County, and Geneva County.

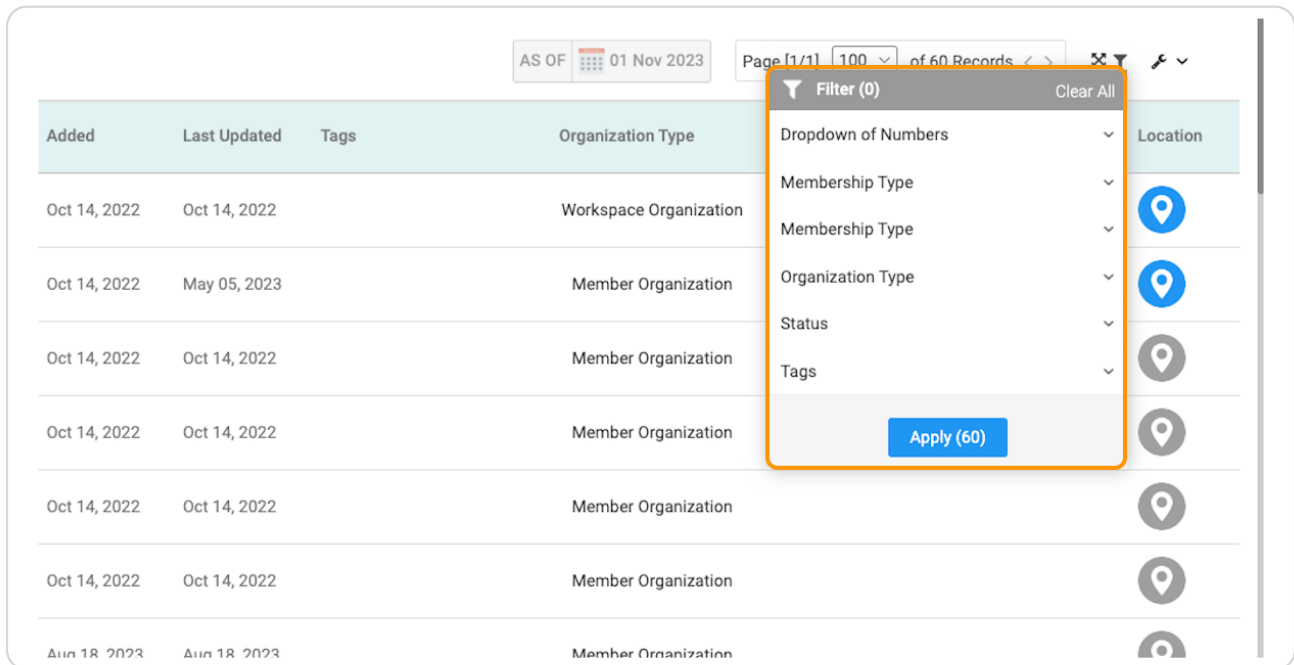
STEP 4

Click on the filter icon to filter and sort your list of organizations

The screenshot shows the top of the Organizations list. At the top right, there is a user profile for 'Crescerance Admin'. Below that, there is a navigation bar with 'AS OF' followed by a calendar icon and '01 Nov 2023'. To the right of that is 'Page [1/1] 100 of 60 Records' with navigation arrows. Further right are icons for a filter (a funnel with a checkmark, highlighted with an orange box), a wrench, and a dropdown arrow. A tooltip labeled 'Filter' is positioned over the filter icon. Below the navigation bar is a table with the following columns: Organization Type, Email, Phone, and Location. The first row shows 'Workspace Organization' with email 'cxsbaengagifii@yopmail.com' and a location pin icon. The second row shows 'Member Organization' with email 'info@sharonsshacks.com' and a location pin icon.

STEP 5

Click on the dropdown menus to chose your criteria

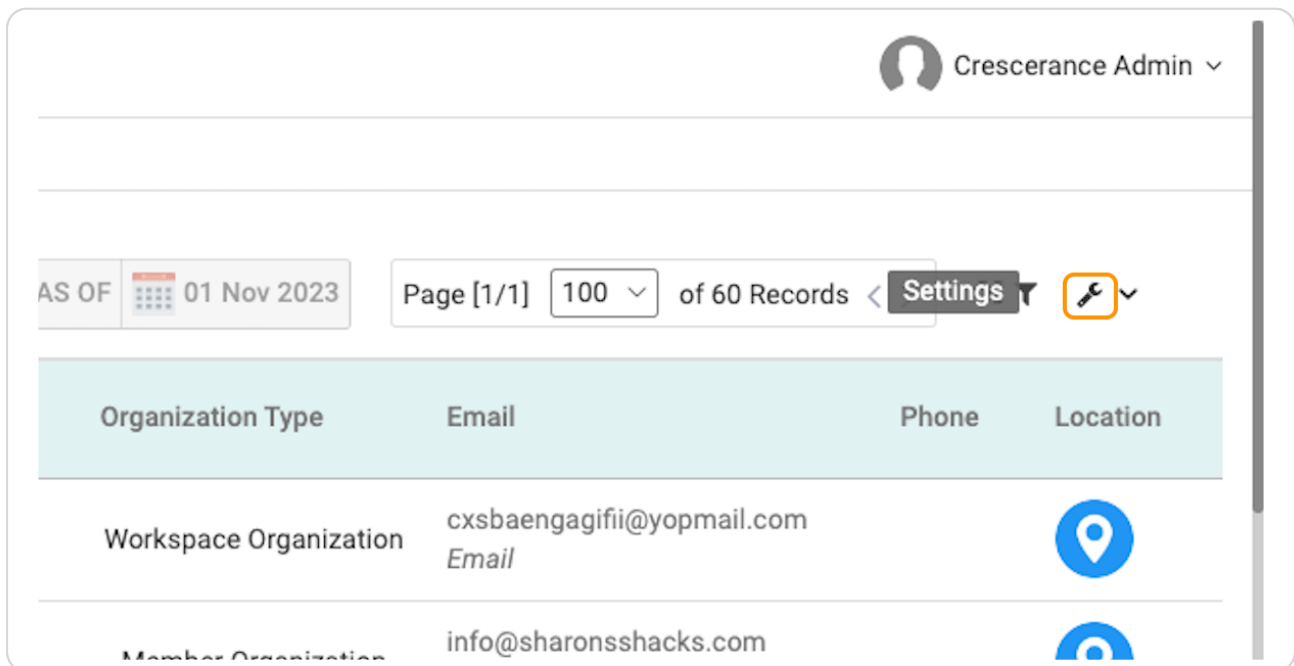


The screenshot shows a data table with columns: Added, Last Updated, Tags, Organization Type, and Location. A filter dropdown menu is open over the table, listing criteria: Dropdown of Numbers, Membership Type, Organization Type, Status, and Tags. An 'Apply (60)' button is visible at the bottom of the dropdown. The table contains several rows of data, including 'Workspace Organization' and 'Member Organization' entries.

Added	Last Updated	Tags	Organization Type	Location
Oct 14, 2022	Oct 14, 2022		Workspace Organization	
Oct 14, 2022	May 05, 2023		Member Organization	
Oct 14, 2022	Oct 14, 2022		Member Organization	
Oct 14, 2022	Oct 14, 2022		Member Organization	
Oct 14, 2022	Oct 14, 2022		Member Organization	
Oct 14, 2022	Oct 14, 2022		Member Organization	
Oct 14, 2022	Oct 14, 2022		Member Organization	
Aug 18, 2023	Aug 18, 2023		Member Organization	

STEP 6

Click on the wrench icon to get to settings

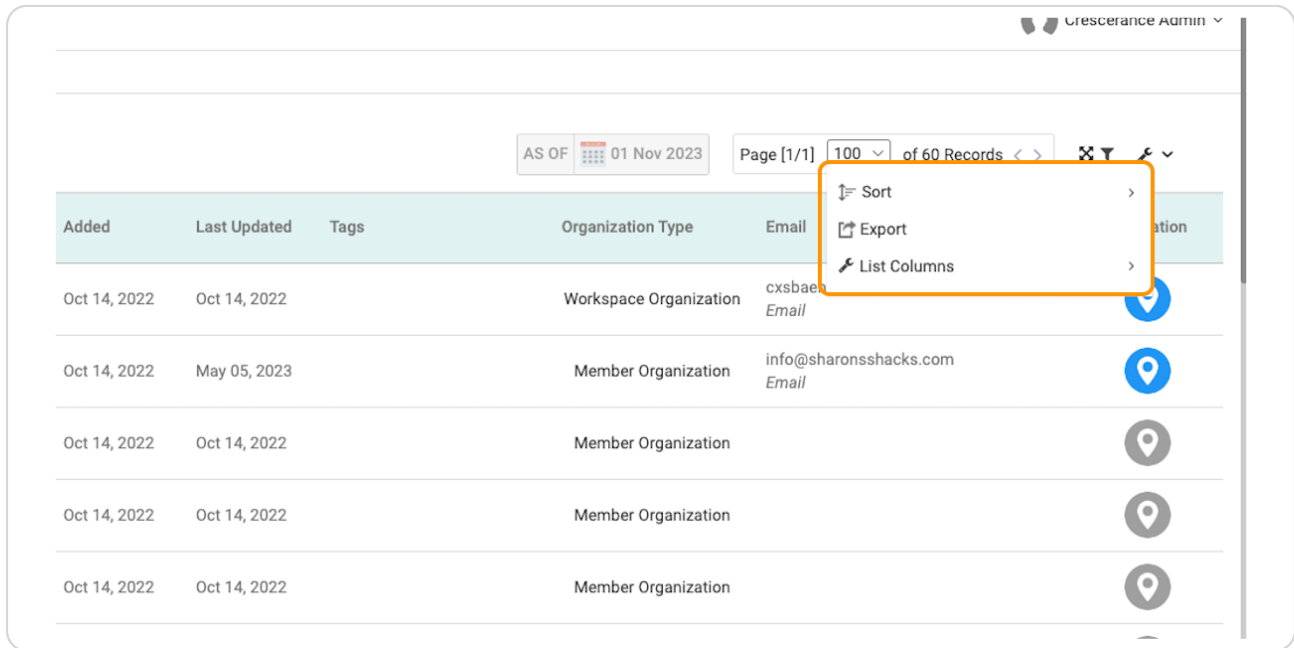


The screenshot shows a user profile page for 'Crescerance Admin'. The page includes a navigation bar with 'AS OF 01 Nov 2023', 'Page [1/1] 100 of 60 Records', and a 'Settings' button with a wrench icon. Below the navigation bar is a table with columns: Organization Type, Email, Phone, and Location. The table contains two rows of data: 'Workspace Organization' with email 'cxgbaengagifii@yopmail.com' and 'Member Organization' with email 'info@sharonsshacks.com'. The wrench icon is highlighted with an orange box.

Organization Type	Email	Phone	Location
Workspace Organization	cxgbaengagifii@yopmail.com <i>Email</i>		
Member Organization	info@sharonsshacks.com		

STEP 7

You can either sort, export list of organizations or rearrange the columns/view

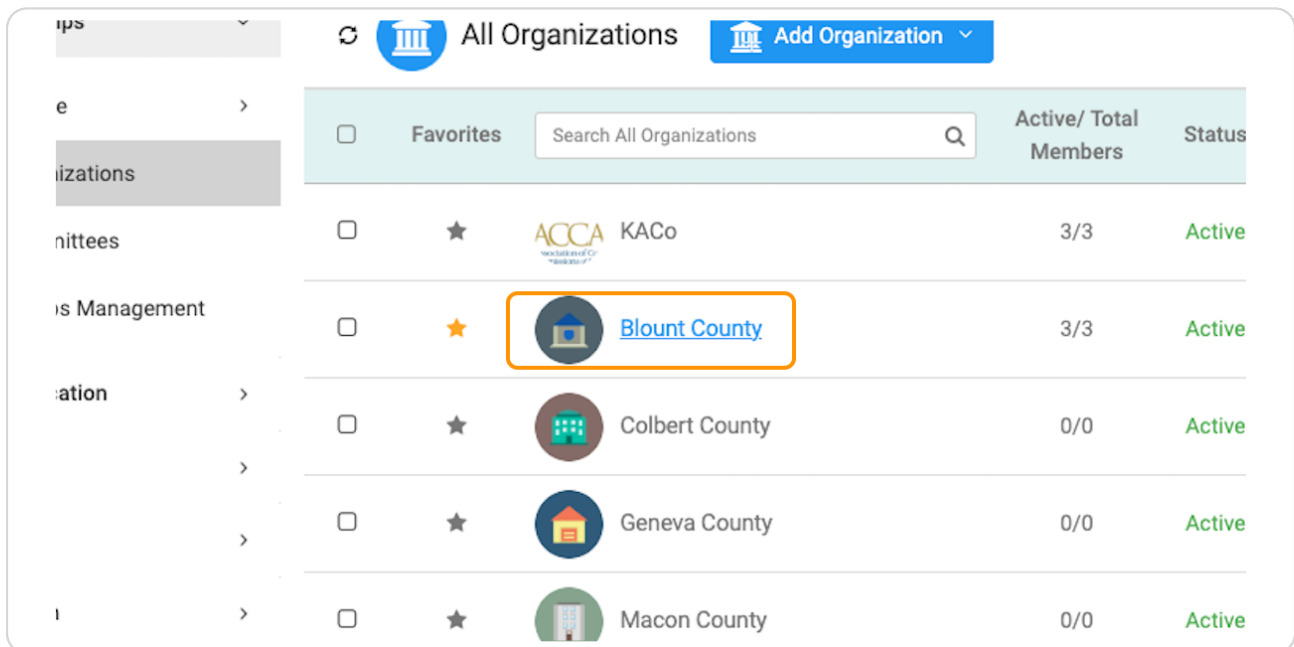


The screenshot shows a table with columns: Added, Last Updated, Tags, Organization Type, Email, and a partially visible 'ation' column. The table contains five rows of data. A dropdown menu is open over the table, showing three options: 'Sort', 'Export', and 'List Columns'. The user is logged in as 'Crescence Admin'.

Added	Last Updated	Tags	Organization Type	Email	ation
Oct 14, 2022	Oct 14, 2022		Workspace Organization	cxsbae Email	
Oct 14, 2022	May 05, 2023		Member Organization	info@sharonsshacks.com Email	
Oct 14, 2022	Oct 14, 2022		Member Organization		
Oct 14, 2022	Oct 14, 2022		Member Organization		
Oct 14, 2022	Oct 14, 2022		Member Organization		

STEP 8

Click on an organization to view details

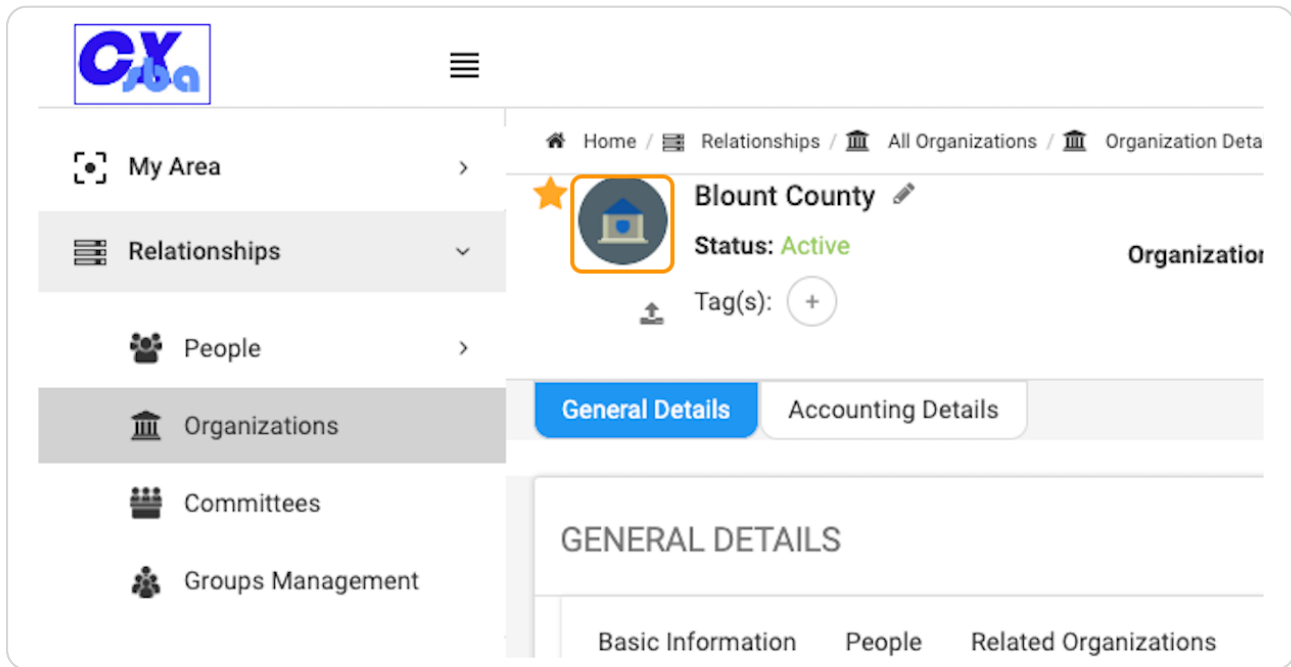


The screenshot shows the 'All Organizations' page. At the top, there is a search bar and a search icon. Below the search bar, there is a table with columns: Favorites, Search All Organizations, Active/ Total Members, and Status. The table lists five organizations: ACCA KACo, Blount County, Colbert County, Geneva County, and Macon County. The 'Blount County' row is highlighted with an orange box.

Favorites	Search All Organizations	Active/ Total Members	Status
<input type="checkbox"/>		3/3	Active
<input type="checkbox"/>	Blount County	3/3	Active
<input type="checkbox"/>	Colbert County	0/0	Active
<input type="checkbox"/>	Geneva County	0/0	Active
<input type="checkbox"/>	Macon County	0/0	Active

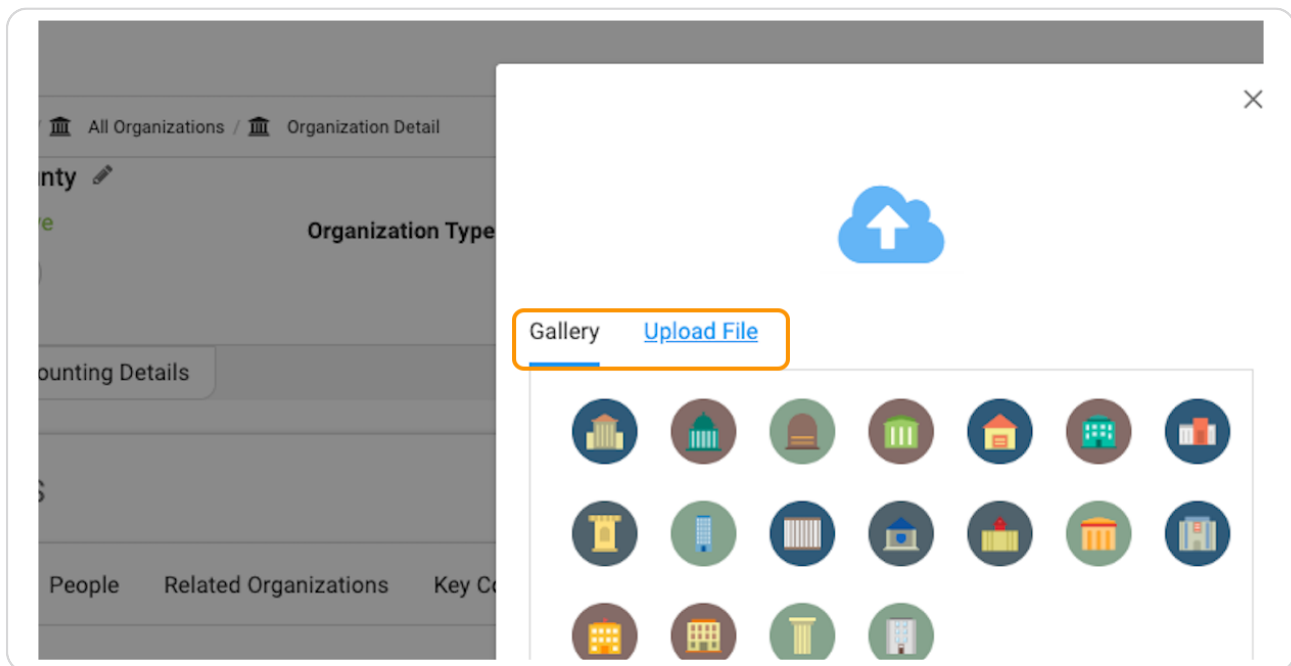
STEP 9

To add or change the organization icon, click on the image



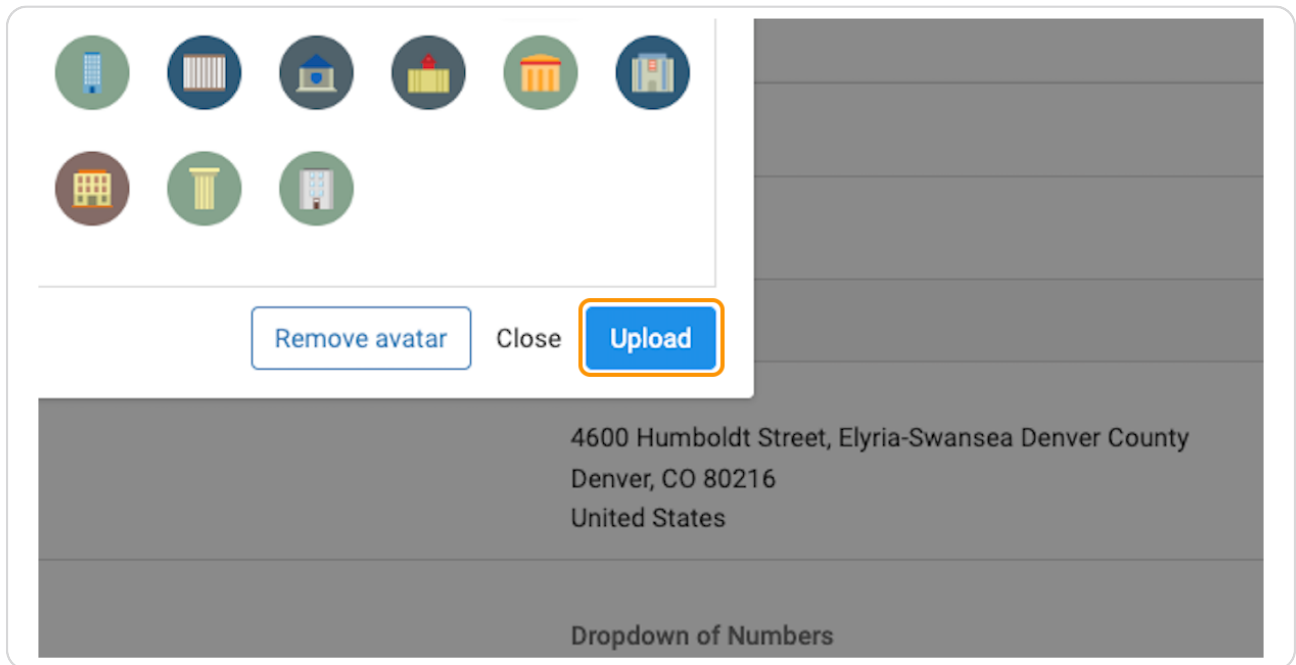
STEP 10

You can choose an avatar or upload your own image



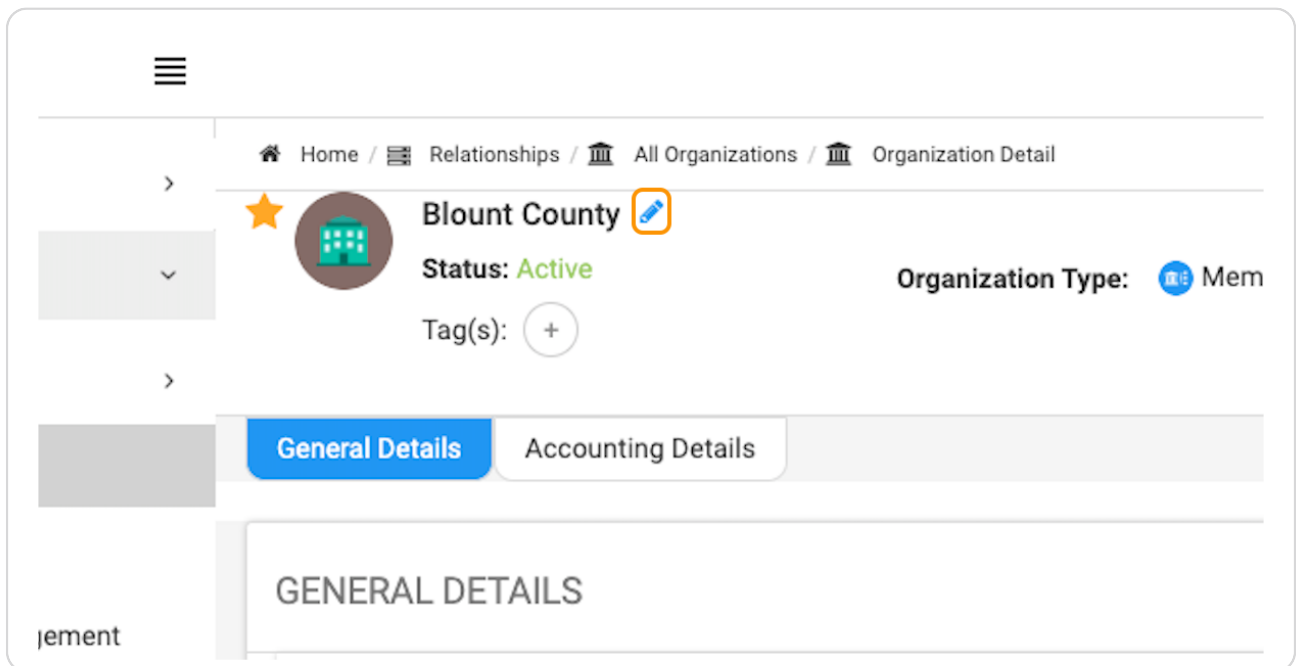
STEP 11

Click on Upload when finished



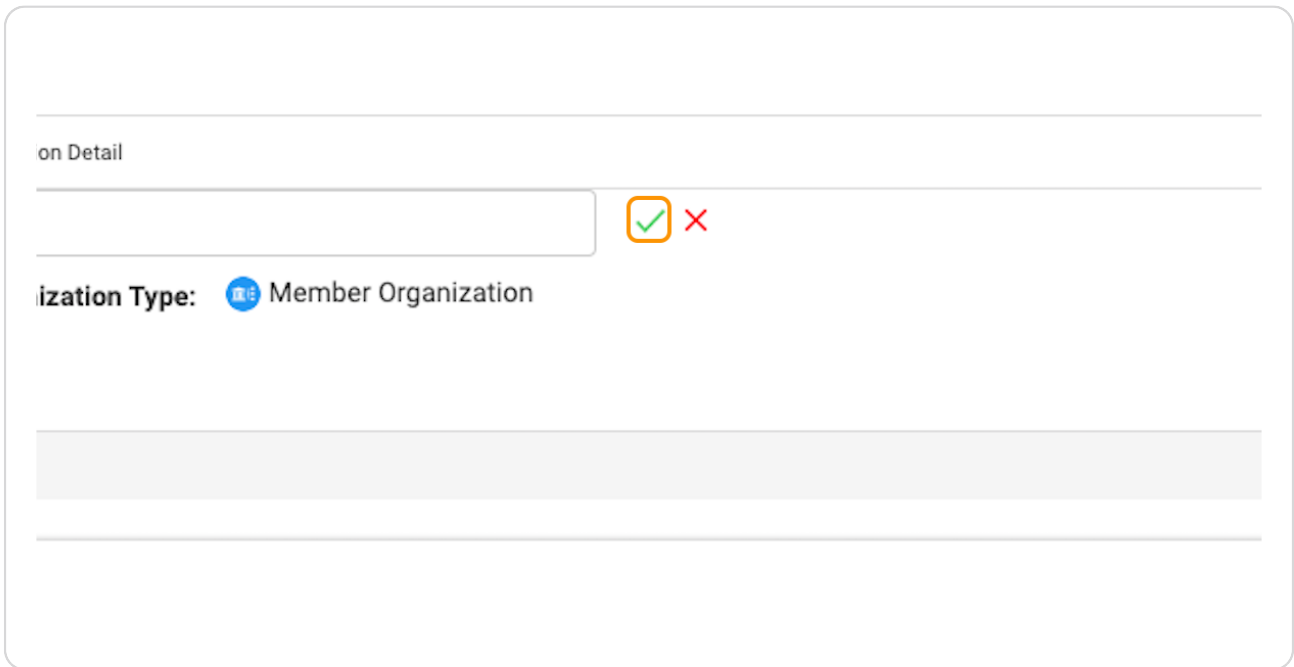
STEP 12

Click on the pencil icon to update the name



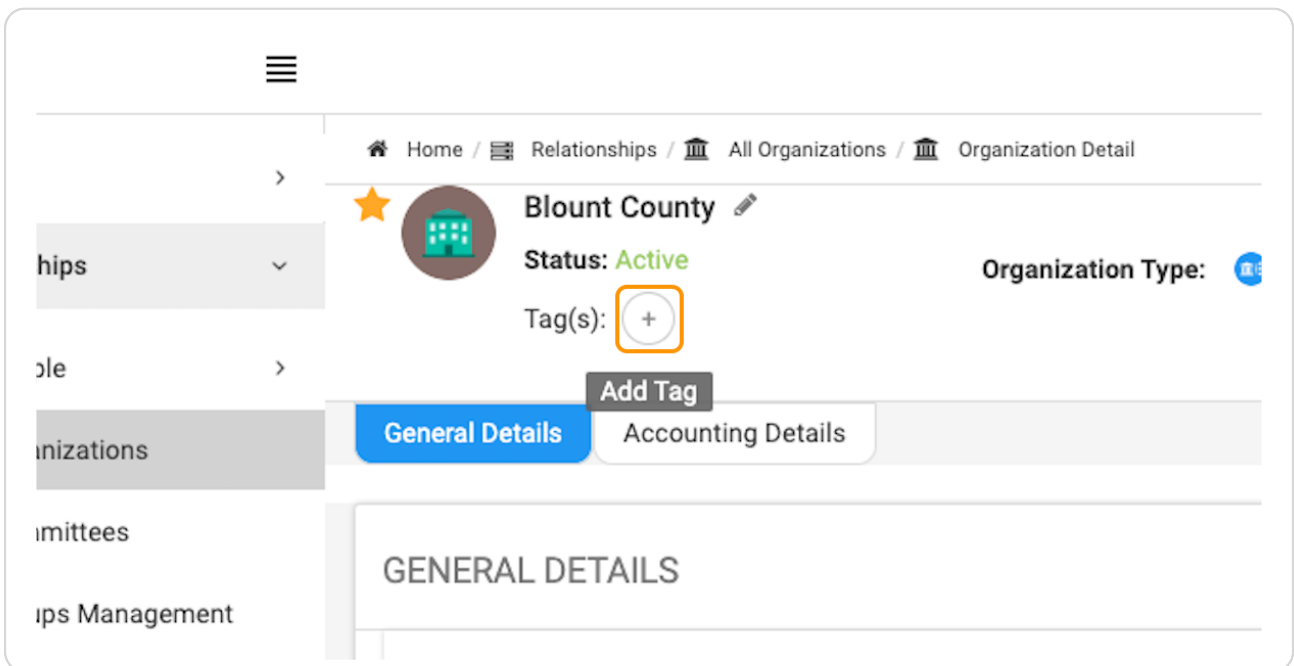
STEP 13

Click on the checkmark when finished



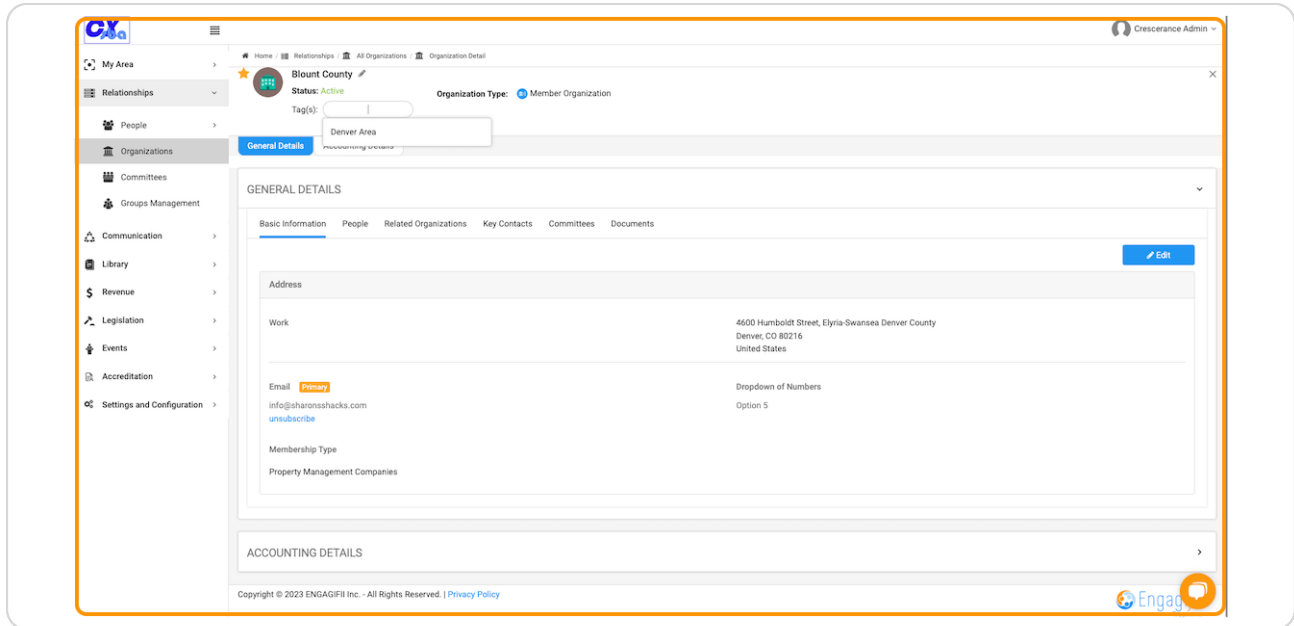
STEP 14

You have the option to add a tag to the organization.



STEP 15

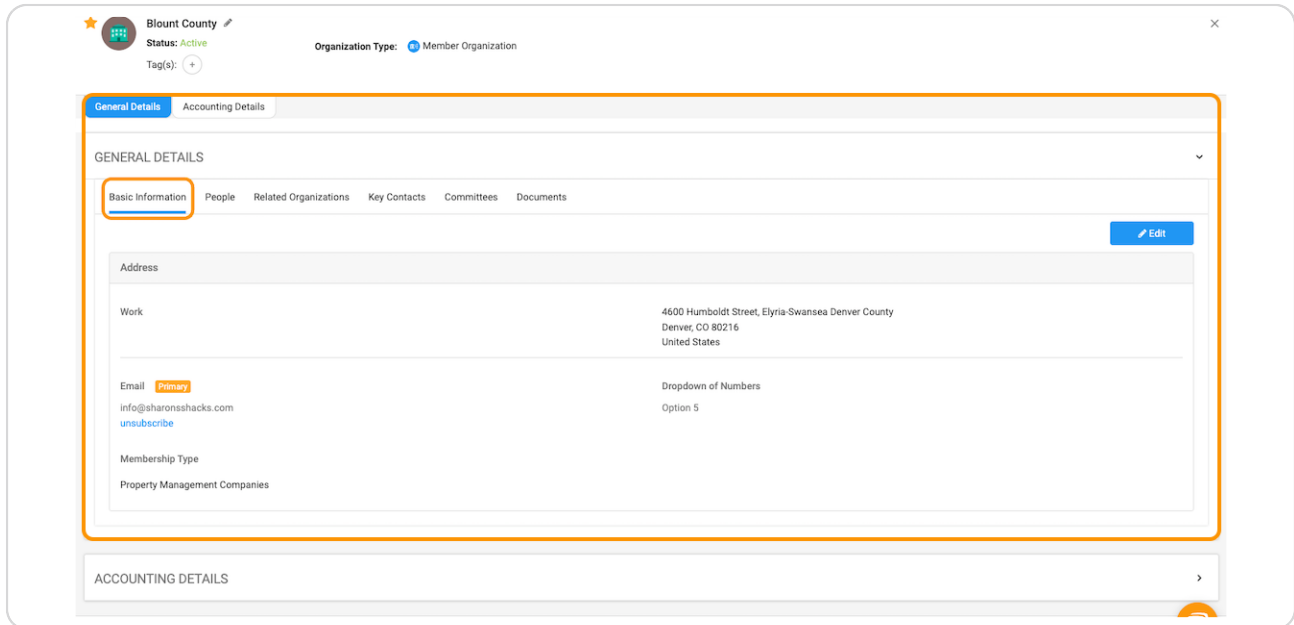
You can choose from the list or type a new one in the text field



STEP 16

Click on General Details to view organization details

The Basic Information tab has all of the details related to the organization, such as address, phone, etc.




STEP 17




The People tab lists all of the people in your organization

GENERAL DETAILS

Basic Information **People** Related Organizations Key Contacts Committees Documents

 People

Favorites

<input type="checkbox"/>	★		Current Position	Current Department	Past Position	Past Department
<input type="checkbox"/>	★	 Ben Stein Current	Assistant District Attorney	Leadership		
<input type="checkbox"/>	★	 Sharon Bells Current	Executive Director	Company Staff	CEO	Leadership
<input type="checkbox"/>	★	 Elicia Hawkins Current	Oncologist	Company Staff		

ACCOUNTING DETAILS


STEP 18

Click on Related Organizations to view any parent or other related organizations

e **Related Organizations** Key Contacts Committees Documents

izations

Organization	Status	Added	Last Updated
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STEP 19

Click on Key Contacts to view

The screenshot shows the Engagifii web application interface. The left sidebar contains navigation options: My Area, Relationships, People, Organizations, Committees, Groups Management, Communication, Library, Revenue, Legislation, Events, Accreditation, and Settings and Configuration. The main content area is for 'Blount County' (Status: Active, Organization Type: Member Organization). Under 'GENERAL DETAILS', the 'Key Contacts' tab is selected and highlighted with an orange box. Below this, a table lists key contacts:

Name	Current Position	Current Department	Status	Email	Phone Number	Contact Type
Sharon Bells	Executive Director	Company Staff	Active	sharonbells@yopmail.com		Billing

At the bottom of the page, there is a copyright notice: 'Copyright © 2023 ENGAGIFII Inc. - All Rights Reserved. | Privacy Policy' and the Engagifii logo.

STEP 20

Click on Committees to view any committees the organization may be associated with

This close-up screenshot shows the navigation tabs for the organization details page: 'Related Organizations', 'Key Contacts', 'Committees', and 'Documents'. The 'Committees' tab is highlighted with an orange box and a blue underline. Below the tabs, a dark grey button labeled 'Committees' is visible. At the bottom, the top of a table is shown with columns for 'Current Position', 'Current Department', and 'Statu'.

STEP 21

Click on Documents to view any stored documents

