Navigating the Organization Profile

21 Steps

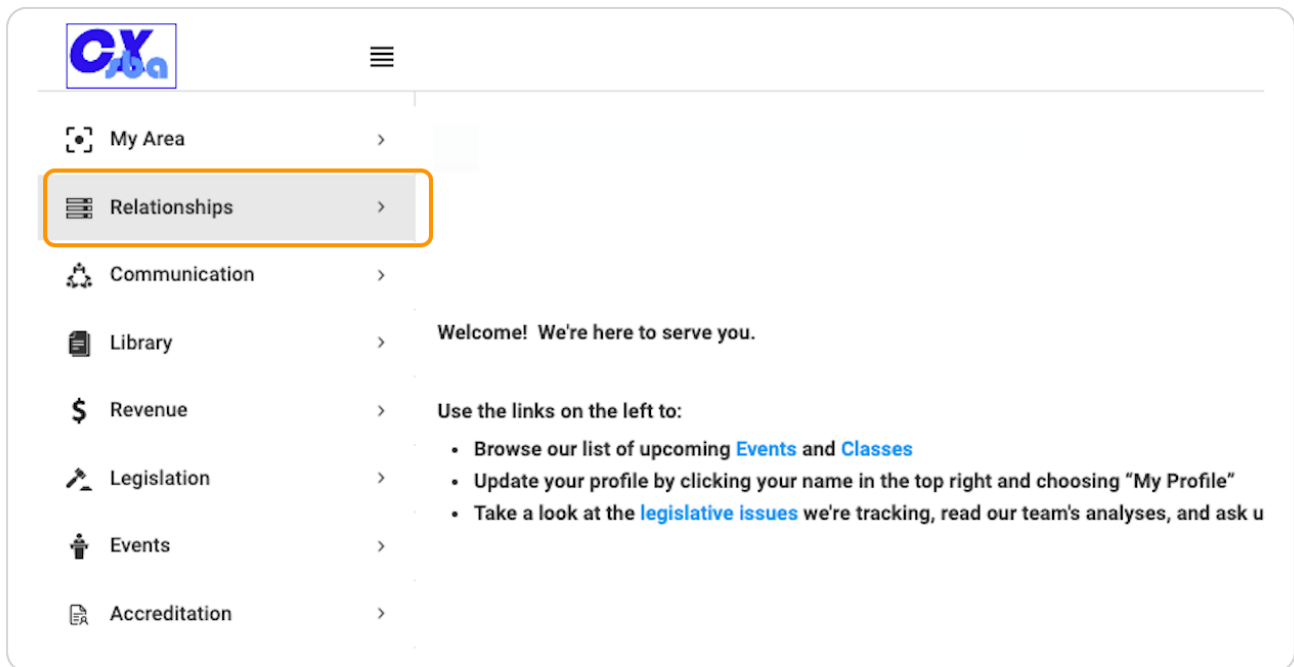
Created by

Engagifii Inc.

Creation Date

November 1, 2023

Last Updated

November 1, 2023

STEP 1

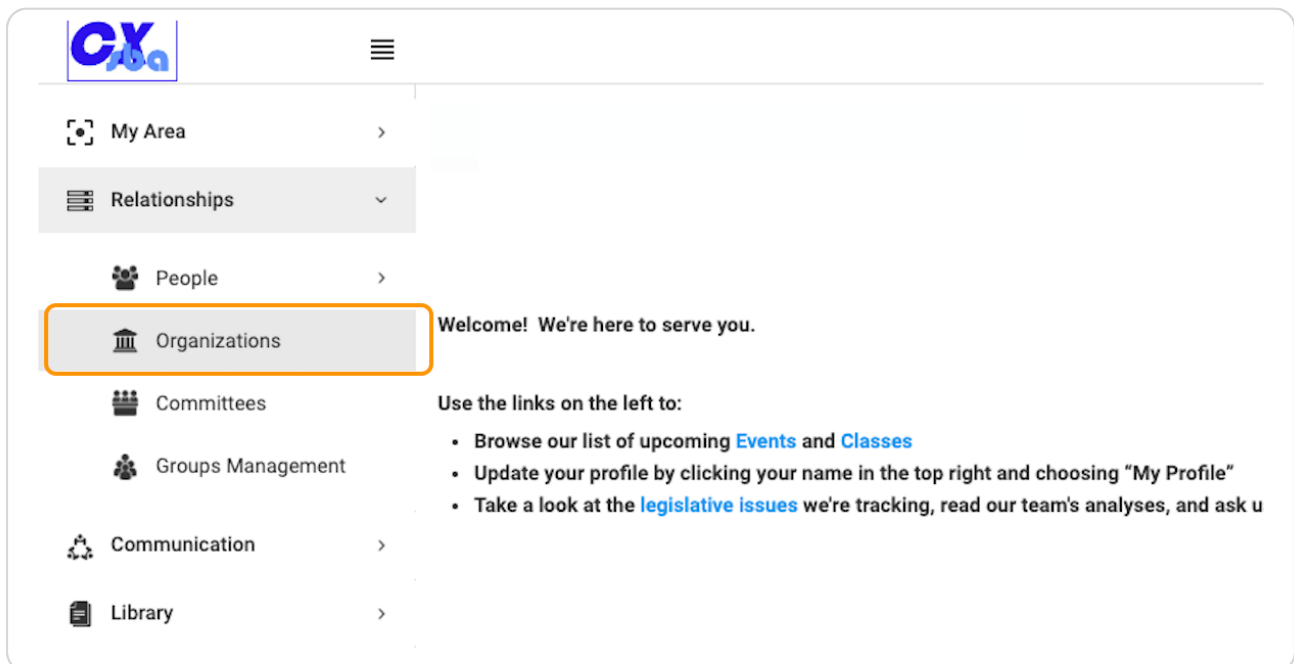## Click on Relationships

STEP 2

Click on Organizations

STEP 3

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

☐ **People** >	☐	**Favorites**	Search All Organizations
Organizations			
☐ **Committees**	☐	★	ACCA KACo
☐ **Groups Management**	☐	★	Blount County
Communication >	☐	★	Colbert County
Library >			
Revenue >	☐	★	Geneva County
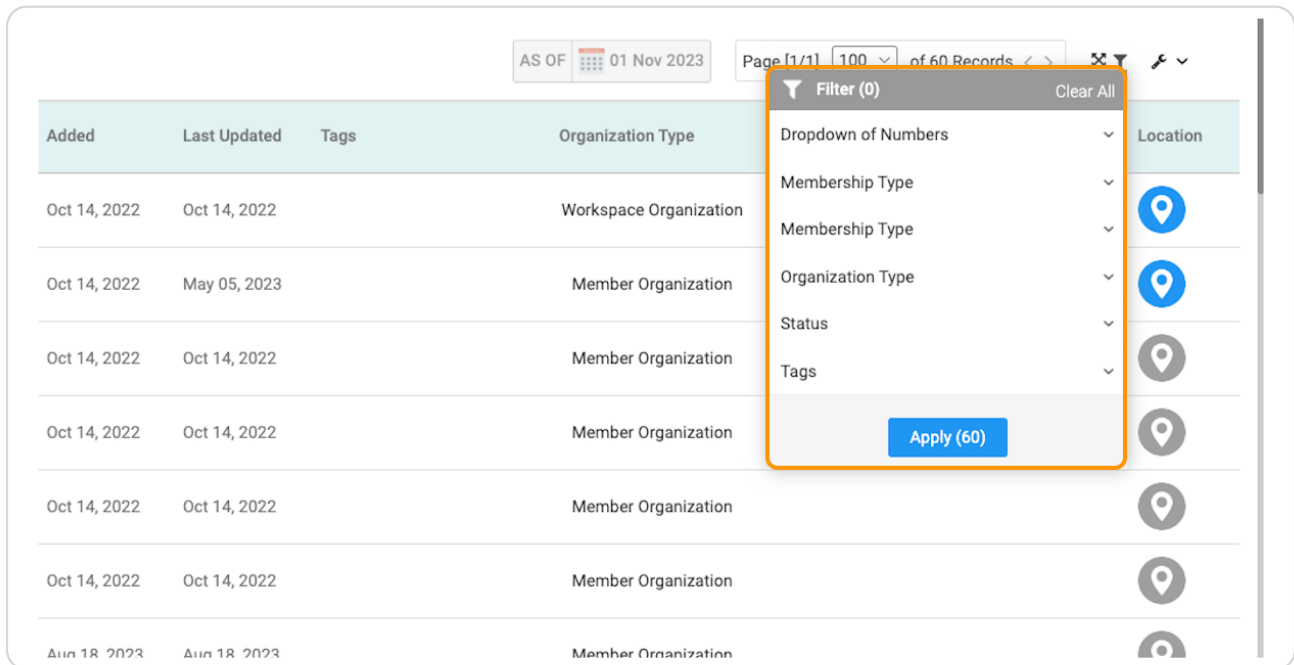
STEP 4

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

Crescerance Admin ⌄

AS OF 📅 01 Nov 2023	Page [1/1] 100 ⌄ of 60 Records ‹ ›	⤢ ▼ 🔧 ⌄

Filter

Organization Type	Email	Phone	Location
Workspace Organization	cxsbaengagifii@yopmail.com
Email		📍
Member Organization	info@sharonsshacks.com		📍

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STEP 5

Click on the dropdown menus to chose your criteria

AS OF 📅 01 Nov 2023   Page [1/1] 100 ∨ of 60 Records ‹ ›
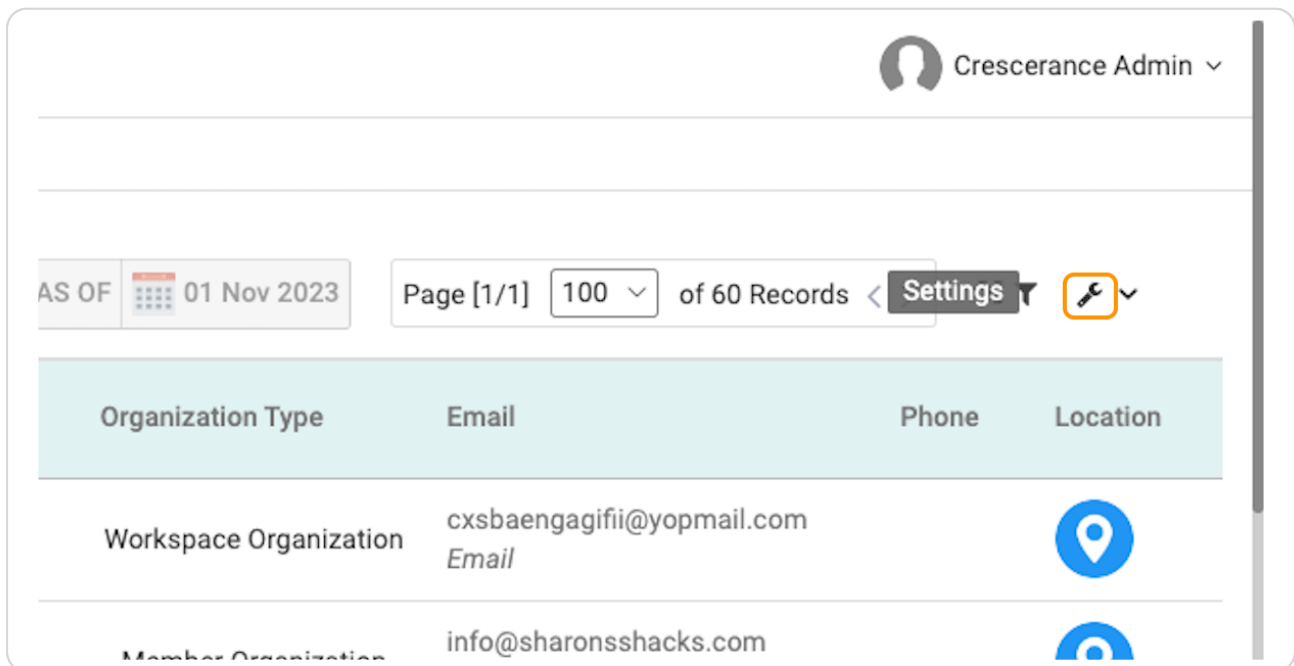
Added	Last Updated	Tags	Organization Type		Location
				▼ Filter (0) Clear All	
				Dropdown of Numbers ∨	
Oct 14, 2022	Oct 14, 2022		Workspace Organization	Membership Type ∨	📍
Oct 14, 2022	May 05, 2023		Member Organization	Membership Type ∨	📍
Oct 14, 2022	Oct 14, 2022		Member Organization	Organization Type ∨	📍
				Status ∨	
Oct 14, 2022	Oct 14, 2022		Member Organization	Tags ∨	📍
				Apply (60)	
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
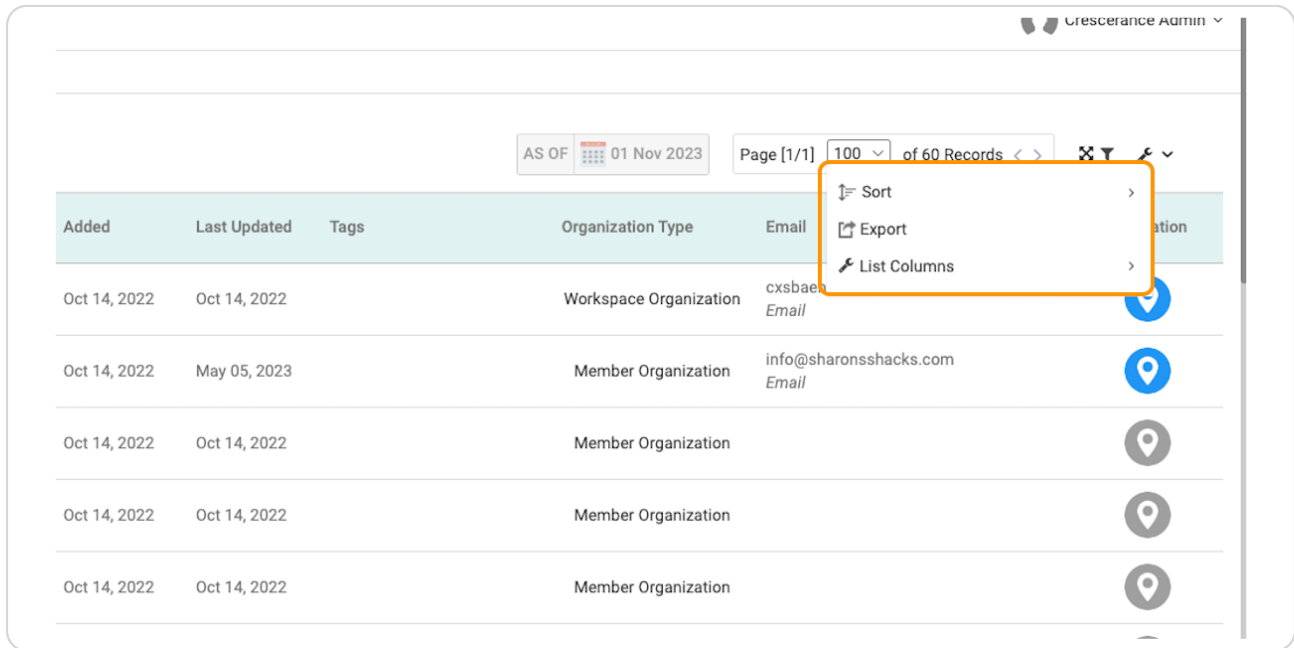
Crescerance Admin ∨

AS OF 📅 01 Nov 2023   Page [1/1] 100 ∨ of 60 Records ‹ **Settings** 🔧 ∨

Organization Type	Email	Phone	Location
Workspace Organization	cxsbaengagifii@yopmail.com *Email*		📍
Member Organization	info@sharonsshacks.com		📍

Engagifii

STEP 7

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

STEP 8

Click on an organization to view details

STEP 9

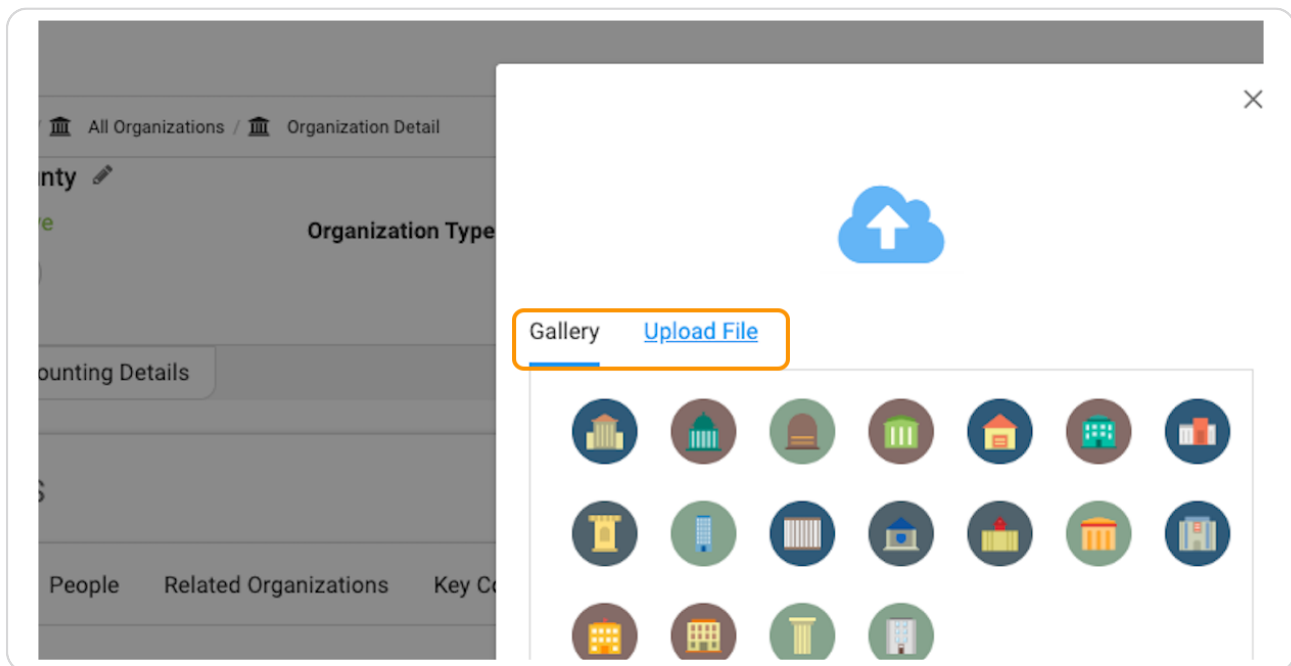**To add or change the organization icon, click on the image**
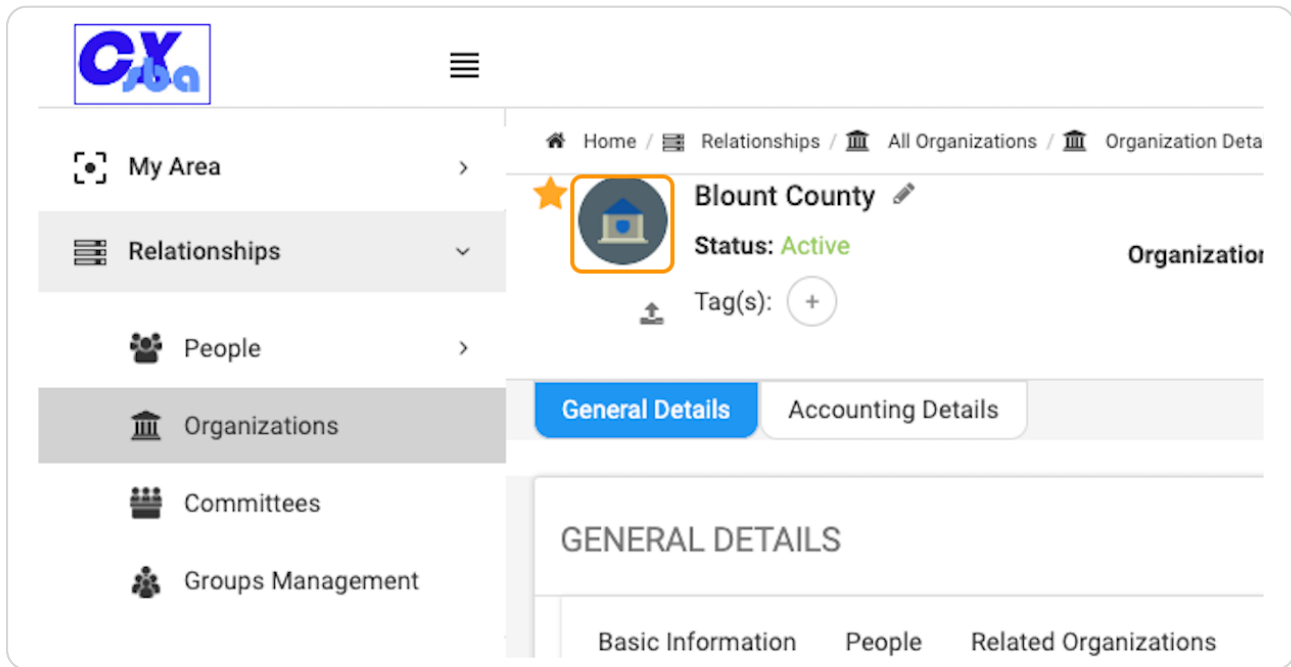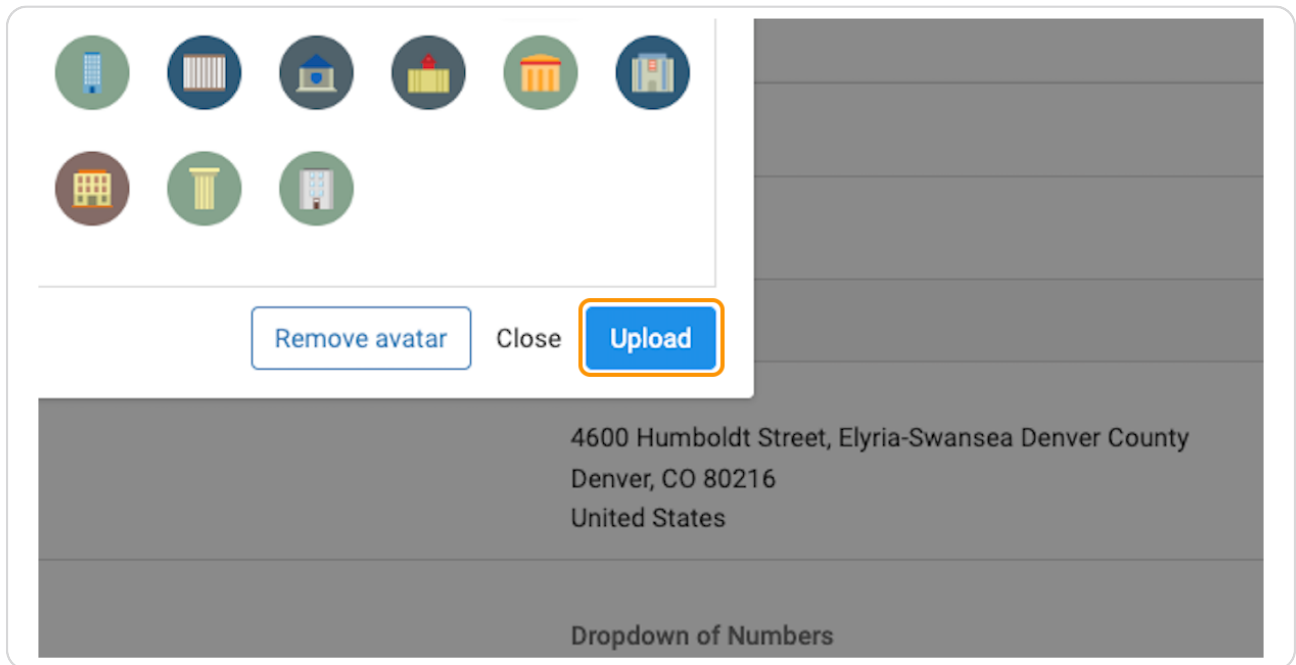

STEP 10

You can choose an avatar or upload your own image
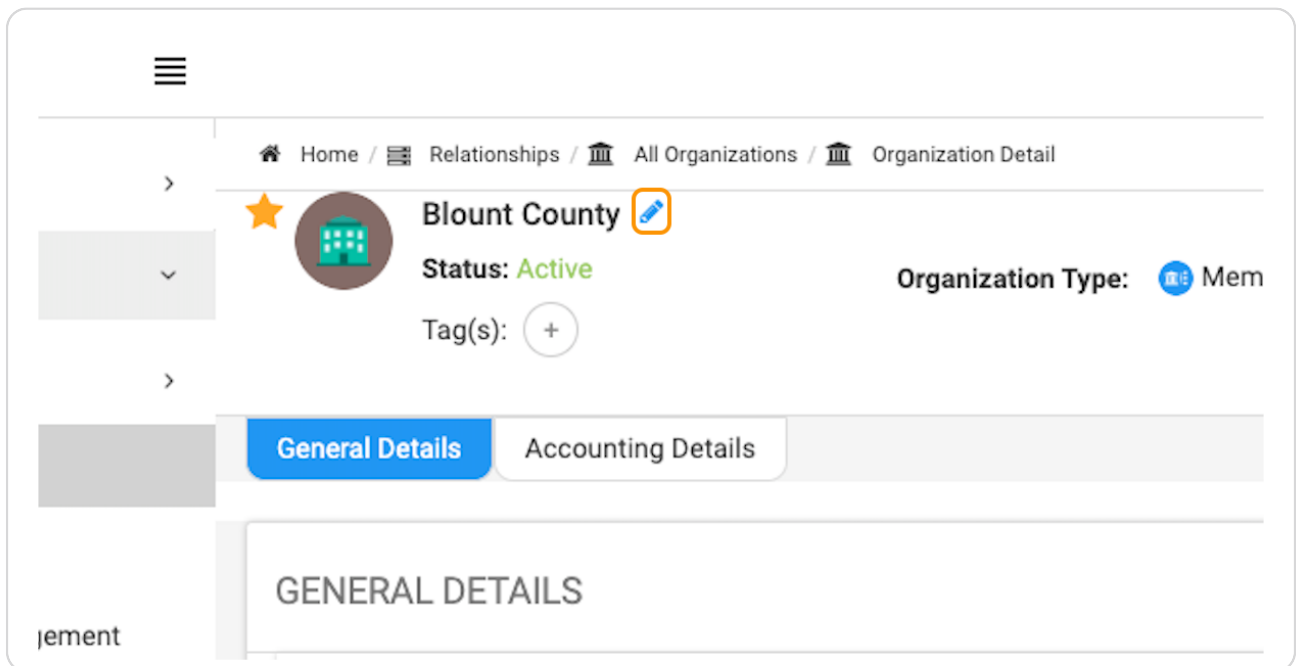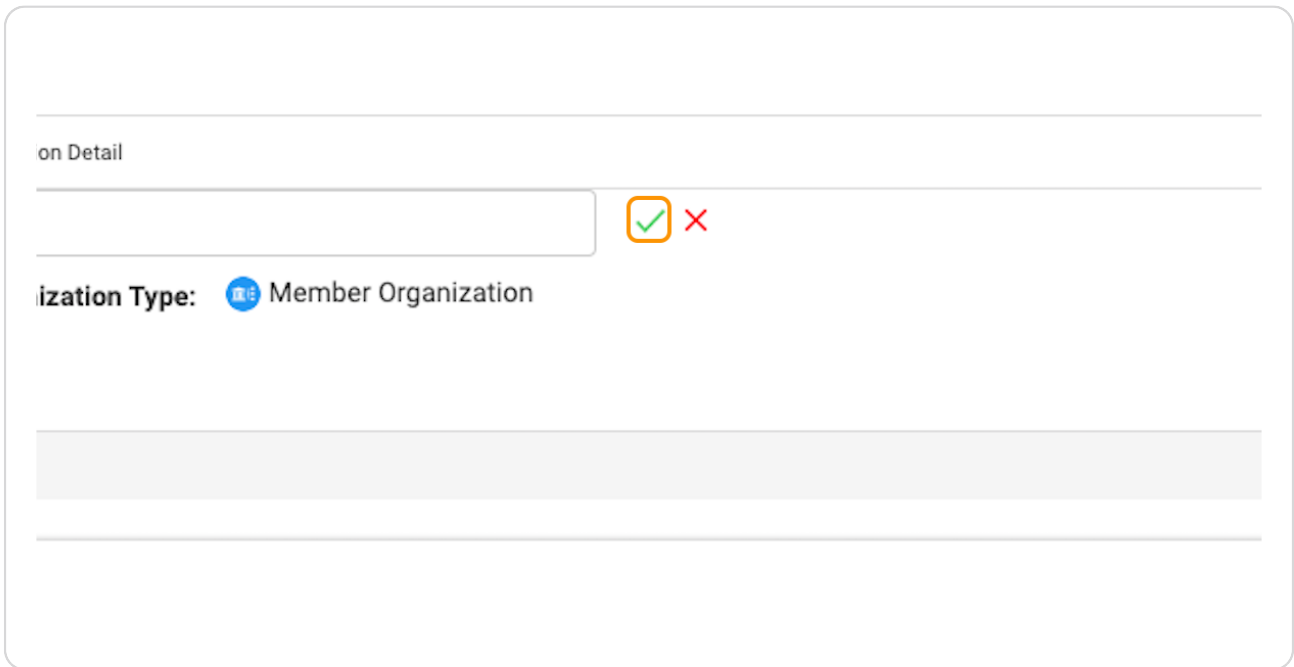
STEP 11

Click on Upload when finished

STEP 12

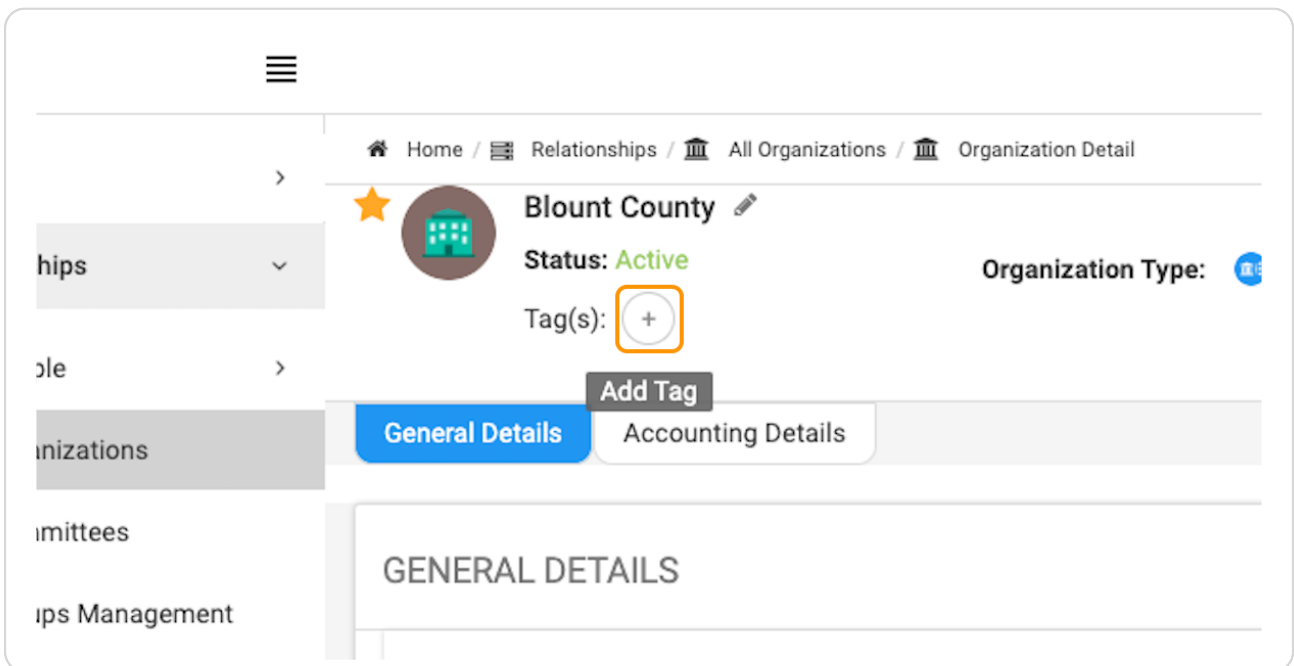**Click on the pencil icon to update the name**

STEP 13

Click on the checkmark when finished

on Detail

ization Type: 🏢 Member Organization

STEP 14

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

≡

🏠 Home / 🗂 Relationships / 🏛 All Organizations / 🏛 Organization Detail

⭐ 🏢 **Blount County** ✏️

Status: Active   **Organization Type:**

Tag(s): (+)

Add Tag

hips ⌄

le 〉

General Details   Accounting Details

nizations

mittees

GENERAL DETAILS

ps Management

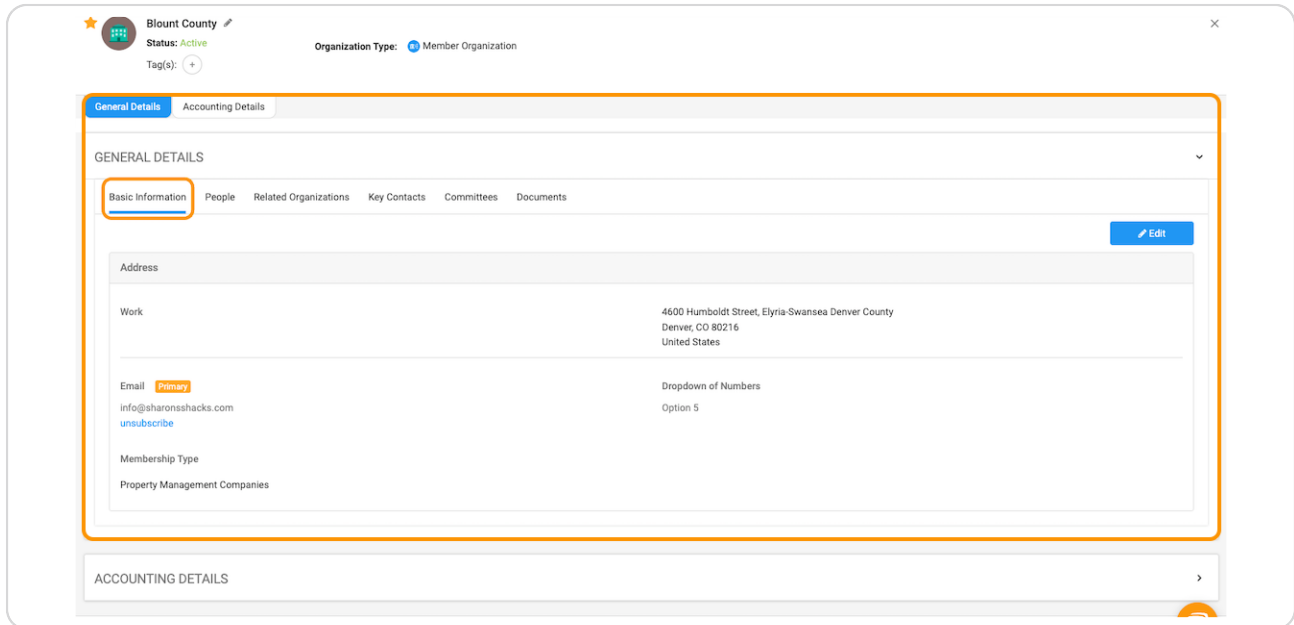Engagifii

STEP 15

You can choose from the list or type a new one in the text field
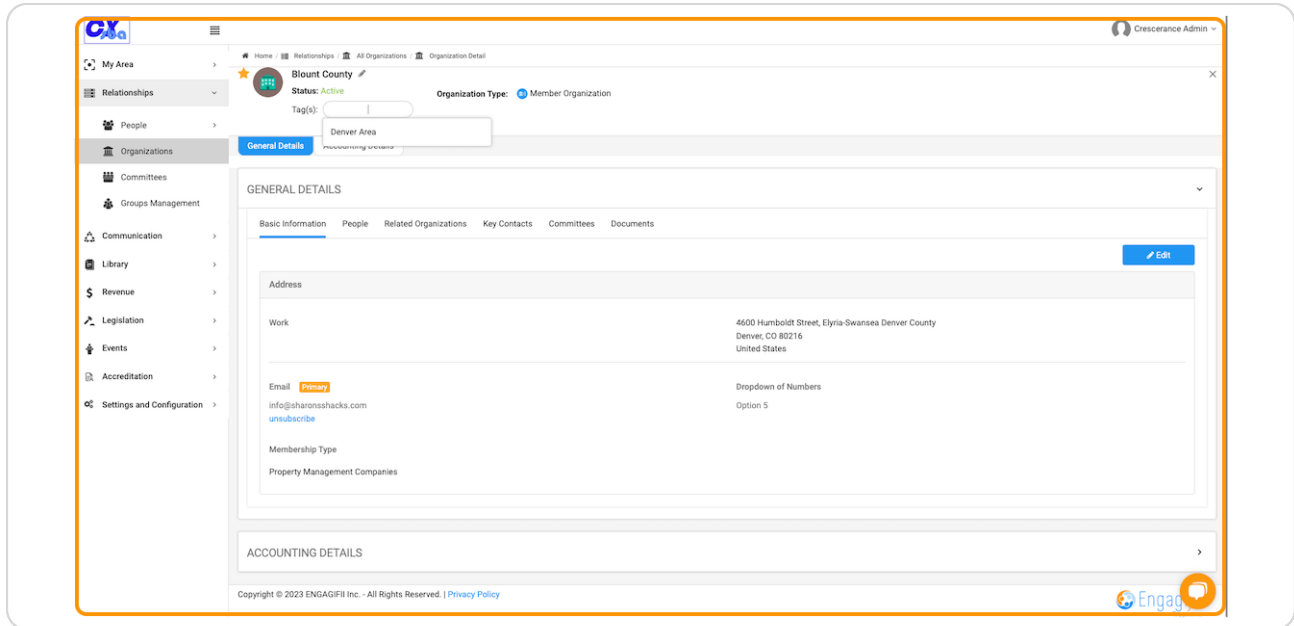
STEP 16

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	Search Name	Current Position	Current Department	Past Position	Past Department
☐	★	Ben Stein `Current`	Assistant District Attorney	Leadership		
☐	★	Sharon Bells `Current`	Executive Director	Company Staff	CEO	Leadership
☐	★	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

nization	Status	Added	Last Updated

STEP 19

Click on Key Contacts to view

STEP 20

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

Click on Documents to view any stored documents

...nizations	Key Contacts	Committees	Documents

Documents

Description	Type