

Define an Organization

Last Modified on 07/08/2025 1:36 pm EDT

DevResults offers several tools for defining organizations:

1. **Create** or **edit** single organization
2. **Create** or **edit** multiple organizations using an **Excel upload**

Note: Any user whose group includes **View & Edit** permissions for **Organizations** can create new organizations.

Create an organization

To add a single new organization, go to **Administration > Organizations**.

This will open the organizations index page. To create a new organization, click the **+ New Organization** button in the lower right.

In the **Create New Organization** pop-up, type the name of the new organization and a short name (nickname or abbreviation) and click the **+ Create Organization** button.

Once you click the **Create Organization** button, you'll be taken to the page for your new organization. All additional fields on the organization page are optional. The activities and users sections will show which activities and users belong to this organization, once assigned. Assign activities and users to organizations on the individual activity or user pages.

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Edit an organization

To edit an organization, go to **Administration > Organizations**.

This will open the organizations index page, shown above.

Click on the organization you'd like to edit. Make changes to any field.

Note: You can change any information about an organization without affecting which activities or users are assigned to that organization.

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Upload new organizations

To add many new organizations at once, you can upload a spreadsheet containing their details instead of creating each organization individually. First, go to **Administration > Organizations** to open the organization index.

On this page, click on the gear icon and then click **Download Blank Template** to get an Excel template.

The screenshot shows the 'Administration' tab with the 'Organizations' sub-tab selected. A table lists various organizations with columns for Organization, Short Name, Primary Contact, and Phone. A search bar is at the top. A gear icon in the top right corner opens a menu with options: 'Export Filtered Items', 'Export All', 'Download Blank Template' (highlighted with an orange box), and 'Import'. A 'Columns' section on the right allows selecting fields to display.

Organization	Short Name	Primary Contact	Phone
Academy for Family Health	AFH	Amadou Oury Forna	870-416-3078
Aid Alternatives, Incorporated	AAI	Martin Flores	+1 888 555 1212
American Institute for International Education of Children	AIIEC	Sidiki Seek	+1 888 555 1212
Association des Agriculteurs	ADA	Mamady Sadjji	+224 3 123 4567
Association National Pour l'Enseignement	ANPLE	Fode Thiaw	+224 3 123 4567
Association of Deveopment Practitioners	ADP	Alphonse Bientot	+1 888 555 1212
Association Wakillo Dey	AWD	Don Evans	+1 888 555 1212
Bhasker International, Inc.	BI	Carly Baker	+1 888 555 1212
Brentonic United	Brentonic	Annie Montepulciano	870-416-3078
Caudill Associates	HCIII	Amelia Scott	+1 888 555 1212
Cityoyens Contre la Corruption	CCC	Mamoudou Cisse	+224 3 123 4567
Committee for Collaborative Collaboration International	CCCI	Aida Fall	+1 888 555 1212
Compassion Corps	CC	Anthony Parker	+1 888 555 1212

Edit the Excel file by adding the list of organizations you'd like to upload.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Organization	Short Name	Phone	Fax	Address	City	State	Zip	Country	Notes	Tags	Primary Contact	Email
2	Refugee Relief, Inc.	RRI	+1 888 555 1212		7758 E Fairview Dr	Atlanta	GA	30301	US		For Profit, International	Hawa Gnimgnon	hawa.gnimgnon@d
3	Srivats Action, Inc.	Srivats	+1 888 555 8483		1283 W Central Ave	New York	NY	10011	US		Faith-Based, International	Grace Young	grace.young@devres
4	Trailblazer International	Trailblazer	+1 888 555 3395		2730 NW M St	Washington	DC	20001	US		International, Nonprofit	Ibrahima Sory Sarr	ibrahima.sory.sarr@c
5	Ministère de la Santé	MinHealth	+224 3 123 7332		912 East Main Ave	Dira			GN		Government, Local	Sekou Brethenoux-Seguin	sekou.brethenoux-se

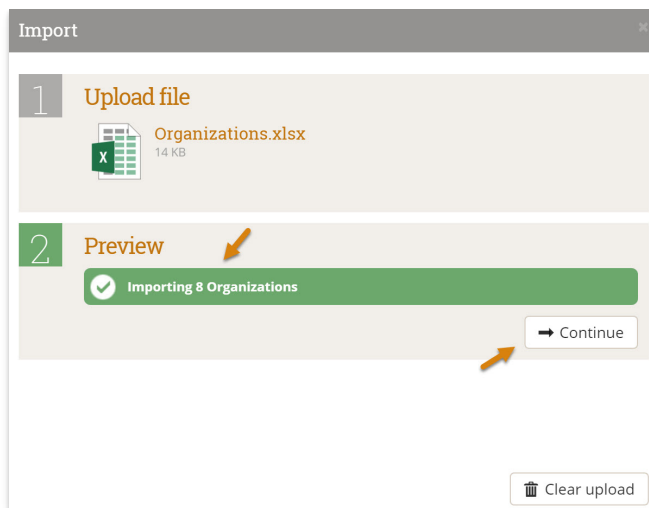
- **Organization** and **Short Name** are required; the other columns are optional.
- You can enter multiple **Tags** separated by commas, for example: "NGO, Government". These need to already exist in your site.
- For the **Country** column, use the two-letter country code as specified by the International Organization for Standardization (sample list available [here](#)).

Save your spreadsheet, click the gear icon again, and select **Import**.

The screenshot shows the 'Administration' tab with the 'Users' sub-tab selected. A table lists users with columns for Photo, Email, First Name, and Last Name. A search bar is at the top. A gear icon in the top right corner opens a menu with options: 'Export Filtered Items', 'Export All', 'Download Blank Template', and 'Import' (highlighted with an orange box). A 'Columns' section on the right allows selecting fields to display.

Photo	Email	First Name	Last Name
AF	aaron.fox@devresultsdemo.com	Aaron	Fox
AD	aboubacar.diallo@devresultsdemo.com	Aboubacar	Diallo
AD	adame.diouf@devresultsdemo.com	Adame	Diouf
AC	adriana.campbell@devresultsdemo.com	Adriana	Campbell
AM	agatha.mcintosh@devresultsdemo.com	Agatha	Mcintosh
AZ	aicha.zeinab@devresultsdemo.com	Aicha	Zeinab
AD	aissata.diop@devresultsdemo.com	Aissata	Diop
AD	aissatou.devers@devresultsdemo.com	Aissatou	Devers
AV	alejandro.vega@devresultsdemo.com	Alejandro	Vega

This will open a pop-up window to walk you through the upload process. Choose your file and make sure the summary shows you the expected number of new organizations. If there are any errors in the file, you'll get a message explaining what they are. If everything looks good, click **Continue**.

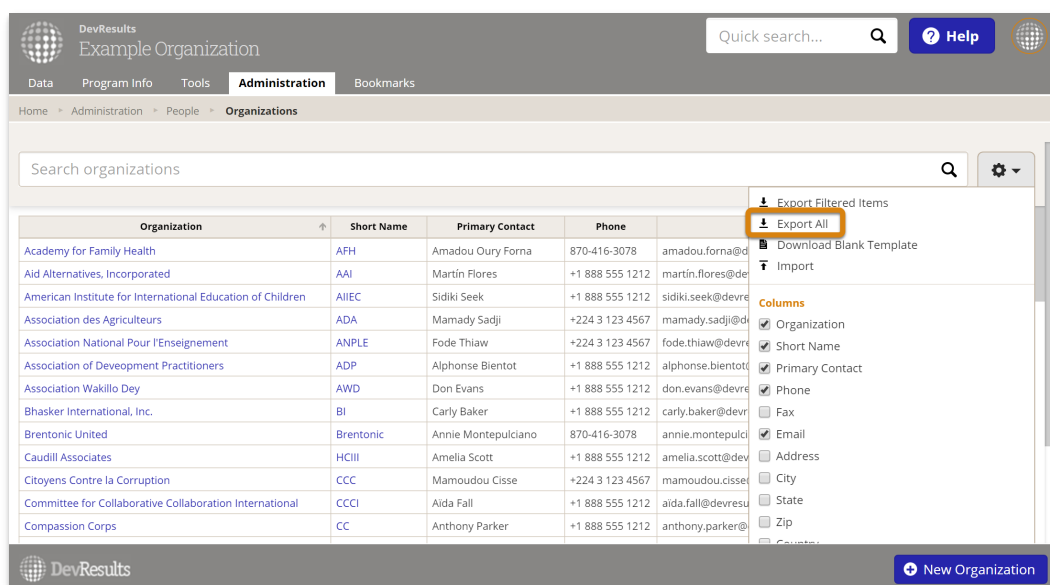


You'll get a message saying that the organizations were imported. Once you click **Done**, your organization index page will refresh and you'll see your new organizations there!

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Edit multiple organizations using an Excel upload

You can also use Excel to update multiple organizations. To do so, use the same instructions as above, but instead of downloading a blank template, choose **Export All**



Then edit the spreadsheet that you downloaded -- for example, to add a new tag, edit the short name, or add a phone number.

Note: To edit existing organizations, DO NOT delete or change the organizationID. This is the only way the system knows which organization should be updated.

When you import the Excel file, existing organizations will be updated with any changes to the spreadsheet.

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