





Customizable Dashboards





With our dashboard customization settings, you can add, remove, or move items on your **Home, Fundraising, People, Compliance, and Event Dashboards**. This will allow you to tailor the major Julep dashboards to fit your unique needs. These custom settings will be saved to your user account, and will be applied to the unique database you saved them in.

Customizing the Dashboard

- To start customizing a dashboard, hover over the  customization button at the bottom of the dashboard you have selected.



- Click the green blue edit button that appears below .
- This will enable customization mode. Hover over the Dashboard items prompting you to Remove, Add, or Move them.

- Remove** – Click  to remove an item from the dashboard view
- Add** – Click  to add an item to the dashboard view.
- Move** – To move panels locations on the Home Dashboard, simply click and drag a panel to a new spot on the dashboard, then let go.
- Once you have made your changes, click the  button in the customization icon to save your changes or  to cancel.

Customization Options Available

The following dashboard features are now available in the dashboards indicated, in addition to the default features normally available. Please note, dashboard views are also dependent on user group settings. If you have any questions about your settings available, please reach out to support@julepcrm.com.

Home

- All Reports
- Next Events
- Top 5 Memberships
- Top 5 Keywords
- Top 5 Flags
- Top 5 Zip Codes (FTD)
- Top 5 Cities (FTD)
- Top 5 Source Codes (FTD)

Fundraising

- Outstanding Pledges
- All Reports
- Fundraising Reports
- My Reports
- My Saved Searches
- My Moves
- My Tasks
- 6 Event Dashboard cards

People Dashboard

- Fundraiser Portfolio
- My Moves
- My Tasks
- All Reports
- People Reports
- Data Maintenance Reports
- My Saved Searches
- My Reports
- Top 5 Events

Events

- All Reports
- My Reports
- My Saved Searches