



julep. Home Dashboard Layout Customization

With this customization tool, you can add, remove, or move items on your **Home Dashboard**. This will allow you to tailor your home dashboard to your needs. These custom settings will be saved to your user account, and will be applied to the unique database you save them in.

Customizing the Home Dashboard

- To start editing your home dashboard, hover over the  customization icon at the bottom of the screen.





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

The screenshot shows the Julep Home Dashboard for the Simms Foundation. The dashboard includes a navigation sidebar on the left with options like Home, People, Fundraising, Treasury, Financial Summary, Data Entry, Event, More, Settings, and System. The main content area features several widgets:



- Total\$ (FTD)**: A large widget showing a total of 295,500, broken down into Building Fund (189,875, 64%), Education Fund (103,610, 35%), and Membership Fund (2,015, 0.68%).
- People**: A widget showing 765,475 people.
- Donors (All-Time)**: A widget showing 343,028 donors.
- Thank You Needed (Last 3 Months)**: A widget showing 24 thank-yous needed.
- Pledge Outstanding (FTD)**: A widget showing \$8,237 in pledges outstanding from 8 gifts.
- Gift Officer Portfolio**: A table with columns for Records Assigned (13), Total Raised (FTD) (\$496,626), Total Open Moves (35), Total Incomplete Tasks (43), and Total Pledges Outstanding (FTD) (\$8,237).
- My Moves**: A widget showing "None found" with a "Remove" button.
- My Tasks**: A widget showing "None found" with a "Remove" button.
- My Reports**: A list of reports including "Dupe Checker (Non-Individuals)", "Outstanding Pledges by Source & ...", "Over Limit Donor - by Fund Code", "People profiles within a radius fro...", and "Income Report Summary by Fund-...".
- My Saved Searches**: A list of saved searches including "All Foundation Records", "2019 Donors", and "Gift Date In Last 30 Days".
- Next 5 Events**: A list of upcoming events with dates and amounts.
- Top 5 Memberships**: A widget showing "None found" with an "Add" button.
- Top 5 Keywords**: A list of keywords including "BOARD MEMBER", "ACKNOWLEDGE", and "CASSIE DONORS".
- Top 5 Flags**: A list of flags including "ANNUAL00 - Rated...", "ASKLVL06 - Ask Lev...", and "ASSETLVL06 - Asse...".

At the bottom of the dashboard, there are two buttons: a red "Remove" button and a blue "Add" button, both with a small gear icon next to 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 in the list.

The screenshot displays the Julep Home Dashboard for the Simms Foundation. The dashboard includes a sidebar menu with options like Home, People, Fundraising, Treasury, Financial Summary, Data Entry, Event, More, Settings, and System. The main content area features several key metrics: Total\$ (FTD) of 295,500, 765,473 People, 543,628 Donors (All-Time), 24 Thank Yous Needed (Last 3 Months), and \$8,237 Pledge Outstanding (FTD). A 'Gift Officer Portfolio' section shows 13 Records Assigned, \$496,626 Total Raised (FTD), 35 Total Open Moves, and 43 Total Incomplete Tasks. Below this are sections for 'My Moves', 'My Tasks', 'My Reports', and 'My Saved Searches'. At the bottom, there are sections for 'Next 5 Events', 'Top 5 Memberships', 'Top 5 Keywords', and 'Top 5 Flags'. A customization overlay is visible in the center, showing a 'My Moves' panel with a 'Remove' button and a 'My Tasks' panel with a 'Remove' button. At the bottom of the dashboard, there are buttons for 'Cancel' (red with an 'X') and 'Save' (blue with a checkmark).

- Once you have made your changes, click the  button in the customization icon to save your changes or  to cancel.