

The Gift Officer feature allows you to track the activity of Gift Officers from the People Records they are assigned to the gifts they fundraise. The Gift Officer feature can be found in a variety of places in Julep and has its own dashboard.

Gift Officer Home Dashboard Features

This Portfolio provides Gift Officers with an overview of all activity associated with the People Records assigned to their Portfolios. Admins will have the additional ability to view aggregated data of all Gift Officers and have the ability to search for specific Gift Officer portfolios for review.

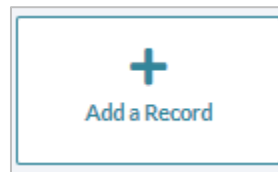
Gift Officer Portfolio					Search for Gift Officers
13 Records Assigned	\$496,626 Total Raised (FTD)	35 Total Open Moves	43 Total Incomplete Tasks		
\$8,237 Total Pledges Outstanding (FTD)		24 Thank Yous Needed (Last 3 Months)			

- Click on any of the drop-down arrows to be provided with additional totals.
- Click on most of the totals to pull the full list of records or items that aggregate that total. Example: Click on Records Assigned and all the records assigned will appear in a list.
- Administrators can use the Search for Gift Officers in the top right to search for a Gift Officer by name or tracker #.

Creating Gift Officers

Every Gift Officer in Julep will first need their own **People Profile**.

1. Click the **Add a Record** action button from the **People Dashboard**.



2. Then, complete all Profile fields as you would normally for a People Record.
3. To make the **People Record** a Gift Officer use the **Gift Officer Tracking#** field.
 - In the field, add a number as the Tracking # for this Gift Officer.
 - Julep will confirm that the number is available or if the number is already in use.
 - If the Gift Officer is also a User in your database, engage the **Link User Account** toggle and use the drop-down provided to select the User account for linking.

Gift Officer Tracking#
1001
<input checked="" type="checkbox"/> Link User Account
Rachel Bryant System Users 2/12/2021


4. Click Save in the bottom right.

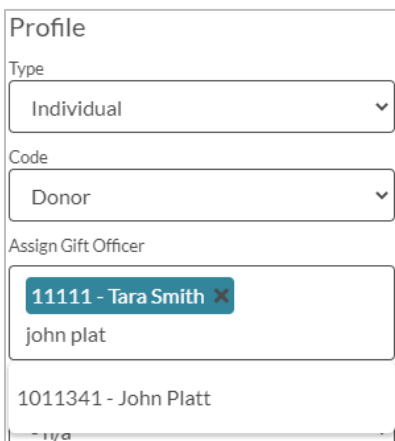
What if the **People Record** had been previously created? You can still create a **Gift Officer Tracking#**. Just open the **People Record** and use the same fields.

Assigning Gift Officers

You can assign Gift Officers to both **People Records** and **Gifts**.

People Records

1. Find and open a **People Record**.
2. In the Record, either click on the **Individual** panel box or the  icon at the bottom of the page.
3. The third field on the far left is **Assign Gift Officer**. This is where you can assign one, or more, Gift Officers to the **People Record**.
4. To assign, begin typing either the name or Tracking # for the Gift Officer. Select from the available options of Officers.



Profile

Type

Individual

Code

Donor

Assign Gift Officer

11111 - Tara Smith X



john plat

1011341 - John Platt

Tara Smith

Money Records

From a **People Record**:

- Click  from the **Giving History** panel or open a recent gift.
- Fill out gift details as normal.
- Before saving, search for a Gift Officer in the **Track#** field, select the right Officer, and then fill in the amount associated with that Gift Officer for this gift.
- To add an additional Gift Officer, click .

Gift Officer

Track#
1011341 - John Platt ✖

Amount
\$ 10000

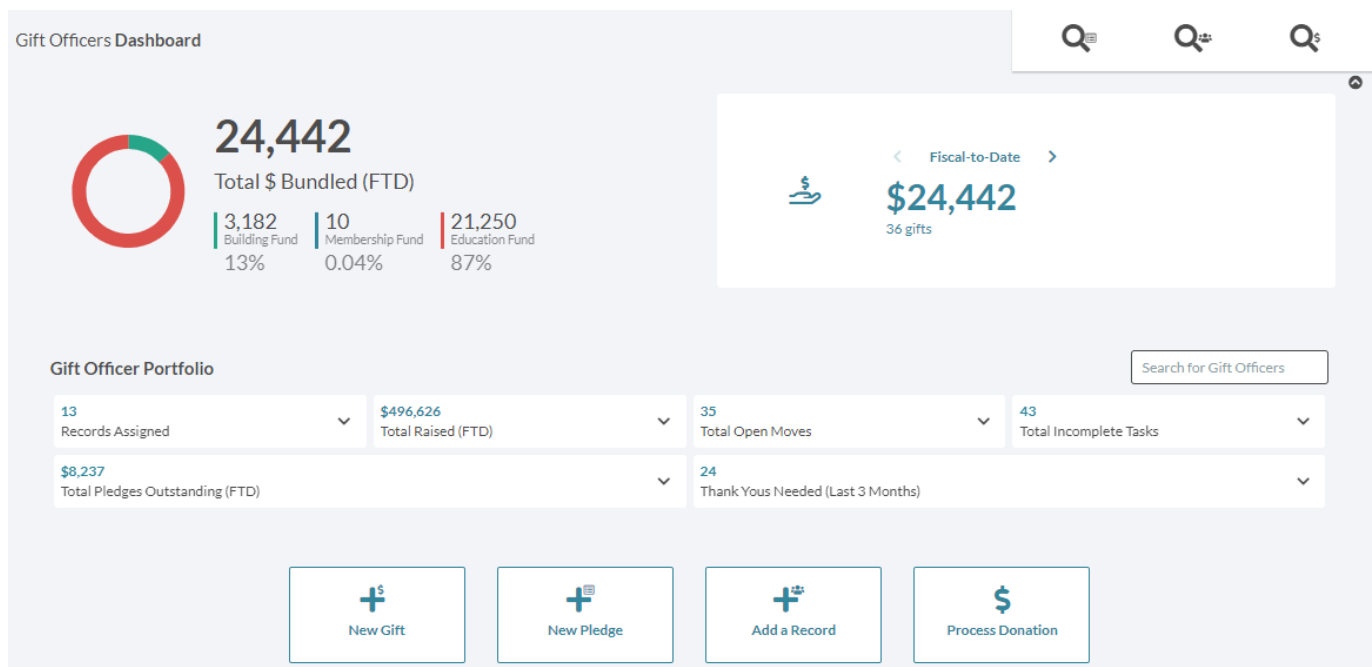
Add Gift Officer

From **Data Entry**:

- Create your batch and open your first Data Entry receipt.
- First, fill out the People Information and the Donation Information, including name, address, amount, and source code information.
- Then, use the **Gift Officer Track#** field, to type and search for the Gift Officer either by Tracking # or name. Select from the available Gift Officers.
- Proceed with saving this receipt, and others in the Batch, and then load transactions once the Batch is Completed.

Gift Officer Dashboard:

While you can view the **Gift Officer Portfolio** from the **Home Dashboard**, you can view that and more on the **Gift Officer Dashboard**. Similar to the Portfolio, this dashboard either can show all Gift Officer activity for Admin view or show only a specific Gift Officer's activity for a non-admin view.



Navigation Bar:

- **Gift Officer Search** – Search for Gift Officers
- **People Search**
- **Money Search**

Charts:

- **Total \$ Bundled (FTD)** – Shows total raised from bundling (Gift Officer gifts) activities.
- **Date Range Calculator** – This scrolls through the total raised in different time frames, from FTD to past 7 days.


Gift Officer Portfolio

This is replicated from the Home Dashboard.

Action Buttons

- **New Gift** – Opens up a quick search to find a or add a **People Record** to then add a gift.
- **New Pledge** – Opens up a quick search to find or add a **People Record** to then add a pledge.
- **Add a Record** – Add a new **People Record**.
- **Process Donation** – Uses **Julep’s** integration with Anedot to process a credit card contribution in Julep.

The remaining part of the dashboard is a series of Top 5 lists to help quickly see who, where, and how the raised \$ FTD gifts are coming in from.

If you wish to see beyond the top 5, click the more  icon in the top right.

<p>Top 5 Gift Officers - Total \$ Raised (FTD) ...</p> <table border="1"> <tr><td>1</td><td>Lydia Siu Track# 1234</td><td>\$18,193</td></tr> <tr><td>2</td><td>Ellen Davison Track# 428740</td><td>\$2,575</td></tr> <tr><td>3</td><td>Linda Escobar Track# 428835</td><td>\$1,750</td></tr> <tr><td>4</td><td>Laura Zine Track# 427085</td><td>\$1,500</td></tr> <tr><td>5</td><td>Hannah Stakey Track# 428923</td><td>\$1,030</td></tr> </table>	1	Lydia Siu Track# 1234	\$18,193	2	Ellen Davison Track# 428740	\$2,575	3	Linda Escobar Track# 428835	\$1,750	4	Laura Zine Track# 427085	\$1,500	5	Hannah Stakey Track# 428923	\$1,030	<p>Top 5 Groups - Total \$ Raised (FTD) ...</p> <table border="1"> <tr><td>1</td><td>Group 2</td><td>\$18,193</td></tr> <tr><td>2</td><td>Group 1</td><td>\$0</td></tr> </table>	1	Group 2	\$18,193	2	Group 1	\$0	<p>Gift Officers With Unmet Goals (FTD) ...</p> <p>None found</p>	<p>Top 5 States - Total \$ Raised (FTD) ...</p> <table border="1"> <tr><td>1</td><td>FL</td><td>\$4,069</td></tr> <tr><td>2</td><td>NY</td><td>\$2,500</td></tr> <tr><td>3</td><td>MO</td><td>\$2,500</td></tr> <tr><td>4</td><td>SC</td><td>\$2,500</td></tr> <tr><td>5</td><td>GA</td><td>\$2,500</td></tr> </table>	1	FL	\$4,069	2	NY	\$2,500	3	MO	\$2,500	4	SC	\$2,500	5	GA	\$2,500									
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