



## Actions

**Actions** help you track how People Records interact with your committee or campaign. You can track involvement of all kinds, ranging from events and volunteer opportunities to constituent interactions at offices. Actions are completely customizable so that you can easily identify the correct action for each record in your database.



In Julep, **Actions** have two layers:



















- **Action Category** – This tells the end user the nature of the action. For example, is this action a type of Volunteer activity or Event related.
- **Action** – This identifies the exact type of Action. For example, they might be Capitol Tour, Office Visit, Door Knocking, or Phone Banking.
- 





### Setting up Action Codes

In order to organize your records, you must first create the action categories and actions. Note: Julep does come with some basic defaults, however, you can modify these as needed.

**Click** on the **People Dashboard** from the **Main Menu** on the left-hand side and then click the  button in the top right of the **Navigation Bar** to open **People Settings**.

1. Select the **Action** tab.
  - Note: To easily see all **Actions**, before viewing **Categories**, click . Skip to Step 5 to add **Actions**.
2. A list of existing **Action Categories** will appear so that you can view and manage. Click the  button to setup a new Action Category.

Flag	Keyword	Attribute	Action	Move	Membership	Membership Status	Contact Flag	Event Status	People Code	Event Invitee Type	Fundraiser Groups
Fundraiser Title		Template									
Add		Show All Actions									
Search Action Category											
Action Category											Note
			 								Organization
			 								Participant
			 								Promotion
			 								Sponsor
			 								Vendor
			 								Volunteer
			 								X Other
  <span>1</span>  											1-7 of 7 items

- To add, fill out the Action Category and create any Custom Column.
- Custom Columns help you record custom, key aspects about the People Record completing the action. For example, for the Volunteer Category you may want to have a custom field for hours.
- To add a Custom Column, click  .
- After you add the Custom Column Name and select the Type for the value of the Custom Column
  - Text – With text the answer you create a set of lookup values for the user to answer
  - Number – Add a minimum and maximum range
  - Date – Select this if you want the value in a date style
- Click **Save** when done.
- Next, to add the **Action**, first select the respective **Category** by clicking  . Then click  in the **Edit Action Category** window.
- Click  and add the **Action** name and Note, if desired:
  - Assign Attribute – Assign an Attribute to have one automatically appended to a People Record when this Action is assigned. For more information, read our Attributes guide.
  - Custom Columns – in addition to being added at the Category level for all Actions in the category, these can also be created at the action level.

Edit Action Category > Action (Organization) > Add Action ← Back X

### Add Action

Action

Assign Attribute (optional)

Note

Custom Columns:

Name

Type

Look up values:

10. Click **Save** when done.

## Assigning Actions to People Records

### People Profile

When in a **People Profile**, you can assign **Actions**. Select the **Actions** panel to start.

Actions						
<input type="button" value="Add Action"/>						
	Action Category	Action	Action Date	Source Code	Note	
<input type="button" value="edit"/> <input type="button" value="delete"/>	Volunteer	Office - IT Support	4/30/19	COMPUPGR		
<input type="button" value="edit"/> <input type="button" value="delete"/>	Volunteer	Office - IT Support	4/30/19	COMPUPGR		
<input type="button" value="edit"/> <input type="button" value="delete"/>	Volunteer	Office - IT Support	4/30/19	COMPUPGR		
<input type="button" value="edit"/> <input type="button" value="delete"/>	Volunteer	Office - IT Support	4/30/19	COMPUPGR		
<input type="button" value="edit"/> <input type="button" value="delete"/>	Volunteer	Office - IT Support	4/30/19	COMPUPGR		
<input type="button" value="edit"/> <input type="button" value="delete"/>	Volunteer	Office - IT Support	4/30/19	COMPUPGR		
<input type="button" value="edit"/> <input type="button" value="delete"/>	Volunteer	Office - IT Support	4/30/19	COMPUPGR		


« < 1 > » 10 items per page 1-7 of 7 items

From here, click  icon to assign a new one. When you begin to type in the Action field, available Actions will appear in a drop down for you to select. Once an Action is selected, the appropriate Custom Columns will appear.

Additional fields are:

- **Action Date** – This a required field. It will automatically prefill with the current date but can be edited.


- **Source Code** – You can link a Source Code to an Action. For more information on this code, check out our guide on Fundraising Codes.
- **Note** – Optional free text

People Search > People Profile > Add Action to People ← Back 

Action - Mr. Joseph M. Banks, Sr. (PID: 2727334)



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Action

Action Date  

Source Code

Note

Once an **Action** is assigned, it will be listed assigned **Actions** list. Click to  edit and to  delete.


## Import – Actions Import

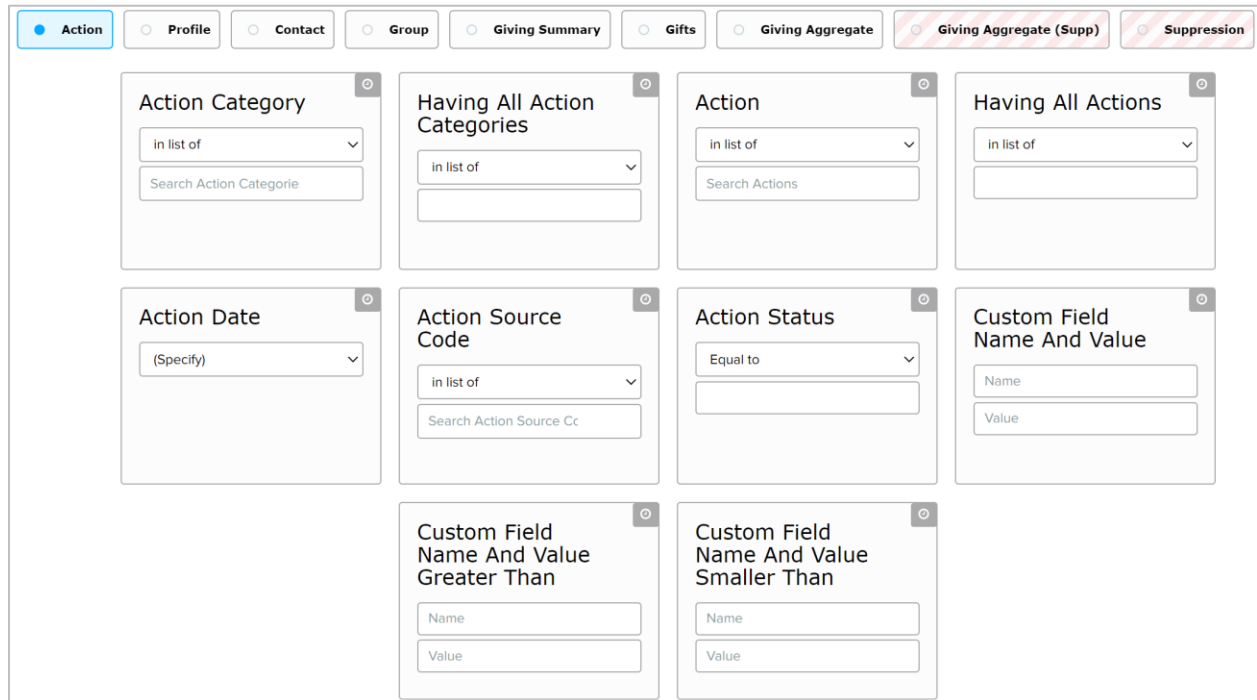
When importing an Excel as follow the same import process as you normally would for a new Contacts import, but in **Step 2 – Import Type** select **Action**. Before importing, make sure the following Action related columns to import **Action** information:

- **Action Name** – Put the Action name here, just the name not the Category.
- **Action Date** – This is for the Action’s Date. This is required for import.
- **Action Source Code** – Source Code, not required.
- **Action Note** – Free text, not required.
- **Custom Fields** – You can import Custom Field information; the custom fields and the values do have to match options that are already in the system. If you have not created them first, you can add them in People Settings. For each custom field use the format below, adding a number for each additional custom field. First, add the Field name, second add the value (look up value, number, or date).
  - **Action Custom Field 1**
  - **Action Custom Field Value 1**

## Searching for Actions

Running a search for Actions in Julep uses the same search feature, with filters designed specifically for Actions.

- To find the **Action Search**, go to the **People Dashboard** and click on the  icon in the **Navigation Bar**.
- The search will provide transactional results, meaning a People Record may appear multiple times if they have multiple actions that match the filters.




The screenshot displays the 'Action Search' interface. At the top, there is a navigation bar with tabs for 'Action', 'Profile', 'Contact', 'Group', 'Giving Summary', 'Gifts', 'Giving Aggregate', 'Giving Aggregate (Supp)', and 'Suppression'. Below the navigation bar, there are several filter panels arranged in a grid. Each panel has a title, a dropdown menu, and a search button. The panels are: 'Action Category' (dropdown: 'in list of', search: 'Search Action Category'), 'Having All Action Categories' (dropdown: 'in list of', search: 'Search Action Source Cc'), 'Action' (dropdown: 'in list of', search: 'Search Actions'), 'Having All Actions' (dropdown: 'in list of', search: 'Search Actions'), 'Action Date' (dropdown: '(Specify)', search: 'Search Action Source Cc'), 'Action Source Code' (dropdown: 'in list of', search: 'Search Action Source Cc'), 'Action Status' (dropdown: 'Equal to', search: 'Search Action Source Cc'), 'Custom Field Name And Value' (input: 'Name', input: 'Value'), 'Custom Field Name And Value Greater Than' (input: 'Name', input: 'Value'), and 'Custom Field Name And Value Smaller Than' (input: 'Name', input: 'Value').

## Action Filters

- **Action Category** – Search for actions within an Action Category
- **Action** – Search specific actions
- **Having All Action Categories** and **Having All Actions** – Similar to the above, but you are searching for what matches ALL of the categories or actions that you list.
- **Action Date** – Date of the actions
- **Action Source Code** – Source Code of the actions
- **Custom Field Name and Value** – Search by the Custom Fields created for the actions. First, add the Custom Field name in the first box, then the second in the Value for the field.
- **Custom Field Name and Value Greater Than** and **Custom Field Name and Value Smaller Than** – Same as above but will search for actions that are greater or smaller than the value entered.
- There are also two **Suppression** filters
  - **Action** – suppresses any actions
  - **Having All Action Categories** – suppresses all actions listed

### Supp: Action

in list of 

Search Supp: Actions

### Supp: Having All Action Categories

in list of 