



Moves Management

Moves Management will help you manage your donors from discovering them to receiving the major donor. Designed specifically to track a major donor through your committee's donor life cycle. It utilizes features you already know and love in Julep, such as Tasks and Notes, while incorporating a whole new dashboard and exciting layout!

To track, assign a **People Record** a **Move** and then move them from Discovery to Completion while tracking any interactions you have with the prospective donor in the way.

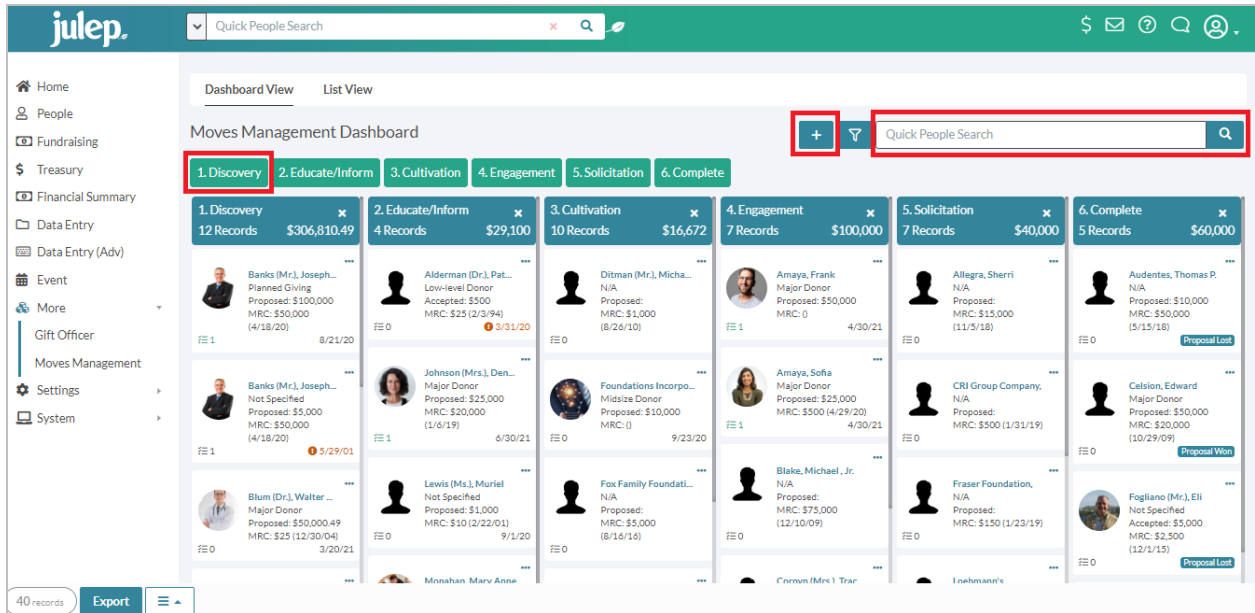
Moves Management Dashboard

The screenshot shows the Julep Moves Management Dashboard. At the top, there is a search bar and navigation icons. The left sidebar contains the Julep menu with 'More' and 'Moves Management' highlighted. The main area is titled 'Moves Management Dashboard' and features six columns representing different stages of the donor life cycle. Each column has a header with the stage name, number of records, and total amount. Below each header is a list of donor profiles with their names, roles, and financial details. The 'More' section of the Julep menu is highlighted, and the 'Moves Management' option is also highlighted.


Access the dashboard from the **More** section of the Julep menu. Once there, there are three different layout options.

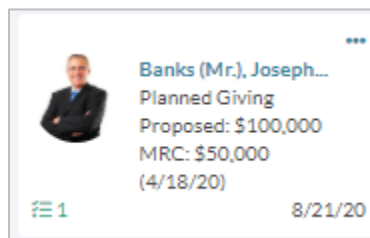
- **Dashboard View** – Here you can see a visual layout of every People Record that is in your Moves Management Cycle.
- **Search** – Use the available search filters to narrow down the People Records.
- **List View** – Here you can see a list view of the People Records in the cycle, as was filter to narrow down.

Dashboard View





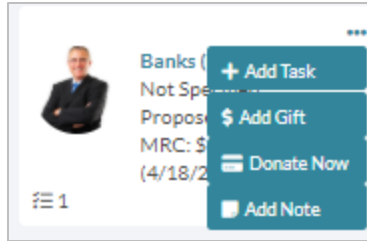
Dashboard View shows the **People Records** and their **Moves** laid out in columns based on the five stages.

- Each header identifies the total prospective donations and number of moves in that stage.
- **Quick Search** allows you to quickly find a People Record in the cycle by Name or PID.
- Click  to add a new **Move** (see more on adding below).
- Drag and Drop the Panel boxes into new columns to quickly change the **Move's** stage.



The Panel Boxes give you a quick overview of the record and the **Move**.

- The first line under the donor name identifies the respective Moves plan. Your organization can set up multiple different Move plans for Major Donors, Midsize Donors, and more.
- The first \$ number identifies how much the Move proposal amount is for.
- MRC identifies the donor's most recent contribution amount and date.
- The due date is located at the bottom right of the panel and tells you when the move is expected to be completed.
 - The due date will display a different color,  5/29/01 showing the Move is overdue.
-  1 identifies the number of open tasks.



If you click the Donor name in the panel, it will open the move for editing, see below, or hover over the **...** button with your mouse to gain access to additional action items:

- **Add a Task** – Add a task to the Record and Move
- **Add a Gift** – Add a gift to the Record
- **Donate Now** – Process a Credit Card contribution in Julep. Contact Customer Support to find out how to enable this feature.
- **Add a Note** – Add a note to the Record and Move

List View

Dashboard View List View

Moves Management Dashboard

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1. Discovery 2. Educate/Inform 3. Cultivation 4. Engagement 5. Solicitation 6. Complete

| | Pid | Due Date | Stage | Plan | Result | Manager | Full Name | Address |
|--|---------|----------|--------------|--------------|--------|----------------|------------------------------|-----------------------------|
| | 2125647 | 9/4/20 | 1. Discovery | Major Donor | | Greg Andreycak | Mills (Mr.), John | 212 35th Avenue, E. P... |
| | 2118339 | 4/8/20 | 1. Discovery | | | Greg Andreycak | Smith, Albert E. | 100 Bayer Road · Johns... |
| | 2118339 | 9/30/21 | 1. Discovery | | | Rachel Bryant | Smith, Albert E. | 100 Bayer Road · Johns... |
| | 2025 | 3/31/20 | 1. Discovery | Not Specifie | | Ryan Ferguson | Smithwick (Ms.), Daniel John | Crown Colony, Apt. 1-1... |
| | 44204 | 3/31/20 | 1. Discovery | Not Specifie | | Ryan Ferguson | Smith (Mr.), Joseph | 107 Shadywood Lane · Br... |
| | 9 | 3/20/21 | 1. Discovery | Major Donor | | Adrienne Royer | Blum (Dr.), Walter, MD | 38 Forest Glen Drive · I... |
| | 16 | 5/22/21 | 1. Discovery | Planned Givi | | Ryan Ferguson | Cooper (Mr.), William | 38 Lancaster Drive · Br... |
| | 2320787 | 3/3/21 | 1. Discovery | Major Donor | | Ryan Ferguson | Johnson (Mrs.), Denise B. | 7939 Fawmwood Drive |

List view shows the **People Records** and their **Moves** laid out in lists per one of the five stages.

- You can add/remove stage(s) in the list by clicking the boxes at the top.
- **Quick Search** allows you to quickly find a **People Record** in the cycle by Name or PID.
- Click to add a new **Move** (see more on adding below).
- Use the options on the bottom right to pull **Call Sheets**, **Exports**, or **Mail Merge** the respective list.



The **List View** gives you access to a couple of action items for the Moves.

- **Edit Move** – Open to edit
- **Donor Profile** – Open the People Record
- **Delete** – Delete the Move
- **Add a Task** – Add a task to the Record and Move
- **Add a Gift** – Add a gift to the Record
- **Donate Now** – Process a Credit Card contribution in Julep. Contact Customer Support to find out how to enable this feature.
- **Add a Note** – Add a note to the Record and Move

Search View

Search View gives you Julep’s classic search feature – use the **Filters** and **Output Fields** to generate on screen results and export an excel of your **Moves**. Enter search view by clicking



Key Filters:

- **Manager** – Manager assigned to the Move.
- **Stage** – What stage in the cycle, such as Discovery or Cultivation.
- **Plan** – The assigned plan such as Midsize Donor or PAC.

- **Due Date** – The date the move is due.
- **Opened Tasks** – Will filter for moves with opens tasks that need to be completed
- **Next Task Due** – Search for moves with Tasks due on a certain date or date range.

Moves Management Search

Quick Moves Management Search

Filters Output Fields Result

| | Pid | Due Date | Stage | Plan | Result | Manager | Full Name | Address |
|--|---------|----------|--------------|---------------|--------|----------------|------------------------------|---|
| | 2125647 | 9/4/20 | 1. Discovery | Major Donor | | Greg Andreycak | Mills (Mr.), John | 212 35th Avenue, E - Petersham - MA 01366-4922 206 |
| | 2118339 | 4/8/20 | 1. Discovery | | | Greg Andreycak | Smith, Albert E. | 100 Bayer Road - Johnson City - NY 13790-1544 |
| | 2118339 | 9/30/21 | 1. Discovery | | | Rachel Bryant | Smith, Albert E. | 100 Bayer Road - Johnson City - NY 13790-1544 |
| | 2025 | 3/31/20 | 1. Discovery | Not Specified | | Ryan Ferguson | Smithwick (Ms.), Daniel John | Crown Colony, Apt. 1-13 - #113 - Pelham - NY 10803 288 |
| | 44204 | 3/31/20 | 1. Discovery | Not Specified | | Ryan Ferguson | Smith (Mr.), Joseph | 107 Shadywood Lane - Pompton Plains - NJ 07444-3059 .28 |

12 records

Search Results:

- Use to add a new **Move**
- Use to open a **Move** for editing
- Use to delete a **Move**
- Use to export the results to a Excel. **Output Fields** will help you select what information to export.

Add Moves

1. To add a **Move**, click on any of the layouts reviewed above.

New Move

Search People

ID or Name

2. Then search for and select the **People Record** to assign the **Move** to or add a new **People Record** to the database by clicking .

Add Move - Joseph Banks (PID: 2017857) 🔄 📄 🗑️ ✖

Subject

Life Cycle Plan Relationship Manager

Life Cycle Stage Created By

Proposal Amount Due Date 📅

Proposal Amount Accepted Created On 📅

Note

Attachment -----

Cancel Save

3. Add the **Move** details:

- **Subject** – Required field
- **Life Cycle Plan** – select a Plan for the Move, these can be edited in People Settings.
- **Life Cycle Stage** – select the Stage for the move. It will default to 1. Discovery.
- **Proposal Amount** – Input the amount you propose to raise from the donor.
- **Proposal Amount Accepted** – Intended for when the Move is completed.
- **Relationship Manager** – Which user is assigned to manage the Move.
- **Created By** – Will default to user logged in.
- **Due Date** – Date the Move completion is due by.
- **Created On** – Will default to the current date.
- **Note** – Detail and outline the Move for this donor.
- **Attachment** – Attach proposal information, donor profile, and more

Edit a Move

To edit a **Move**, access the move from the Panel Box, List, or Search Results.

Edit Move - Mr. Joseph M. Banks, Sr. (PID: 2727334) 👤 📞 🖨️

Subject
Initiate

Life Cycle Plan: Major Donor Relationship Manager: Junho Bae

Life Cycle Stage: 1. Discovery Created By: Junho Bae

Proposal Amount: \$ 100000 Due Date: 08/21/2020

Proposal Amount Accepted: \$ Created On: 04/02/2020

Note

Attachment

📁
Choose a file or drag
it here.

[Add Gift](#) [Donate Now](#)

| | | | | | |
|-------------------|------------------------|---------------------|--------------------|----------------------|------------------|
| 1. Discovery 1 | 2. Educate/Inform 0 | 3. Cultivation 0 | 4. Engagement 0 | 5. Solicitation 0 | 6. Complete 0 |
|-------------------|------------------------|---------------------|--------------------|----------------------|------------------|

Open Tasks (1) +

Call ✖




Call / Ask

Due Date: 4/17/20

Closed Tasks (0) +



Notes (0) +

You can edit all of the **Move** details that was detailed under **Add a Move**, including changing the Stage and submitting a Proposal Amount Accepted, and more.

-  - Click access to the Record's relationships.
-  - Click to access the Record's phone and email information. If on a mobile browser, you can one click call with the phone numbers.
-  - Click to access the call sheets to print and download.
- [Add Gift](#) - Click to add a gift.
- [Donate Now](#) - Click to process a gift in Julep. Contact Julep Support if you want to have this enabled for your database.

If you scroll to the bottom half of the **Move** you can manage activity for each stage of the record's Life Cycle.

The screenshot displays a horizontal navigation bar with six stages: 1. Discovery (1), 2. Educate/Inform (0), 3. Cultivation (0), 4. Engagement (0), 5. Solicitation (0), and 6. Complete (0). Below this bar are three tabs: 'Open Tasks (1)' with a plus icon, 'Closed Tasks (0)' with a plus icon, and 'Notes (0)' with a plus icon. The 'Open Tasks (1)' tab is active, showing a task card with the text 'Call', 'Call | Ask:', and 'Due Date: 4/17/20'. A red square with a white 'x' icon is located in the top right corner of the task card.

- Use the tabs to move back and forth between stages.
- Open Tasks
 - Click  to add a new task or note to the **People Record** and the **Move**.
 - Click on any of the Subjects to open and edit the task or note.
 - Click  to delete any of the tasks or notes.