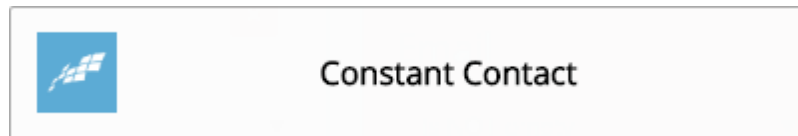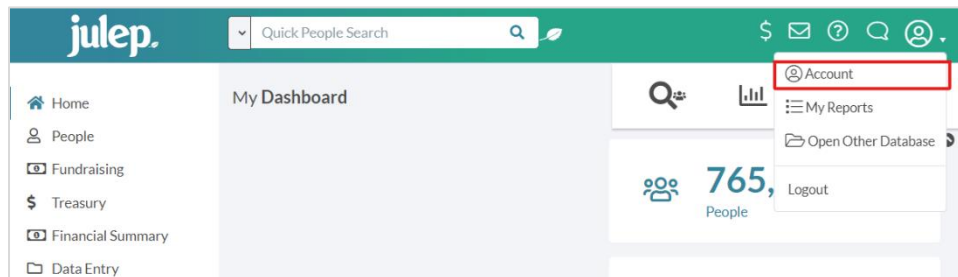# Julep – Email Integration

The Email integration features allow clients to connect their email marketing platforms and authorize Julep to push a list of emails to the platform using the robust People Search segmentation filters available. Below is a list of currently available email platforms for integration:
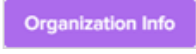

How to Setup Integration

NOTE: Only Julep **Project Admin** users can enable these settings.

1. Log into Julep and click on the **My Account** dropdown located in the top right corner of Julep and select the **Account** settings option.

2. Click on the **Organization Info** button that appears in the top right corner of the new window.

3. The Organization Info will appear. Click on **Data Integration** at the footer of the screen.
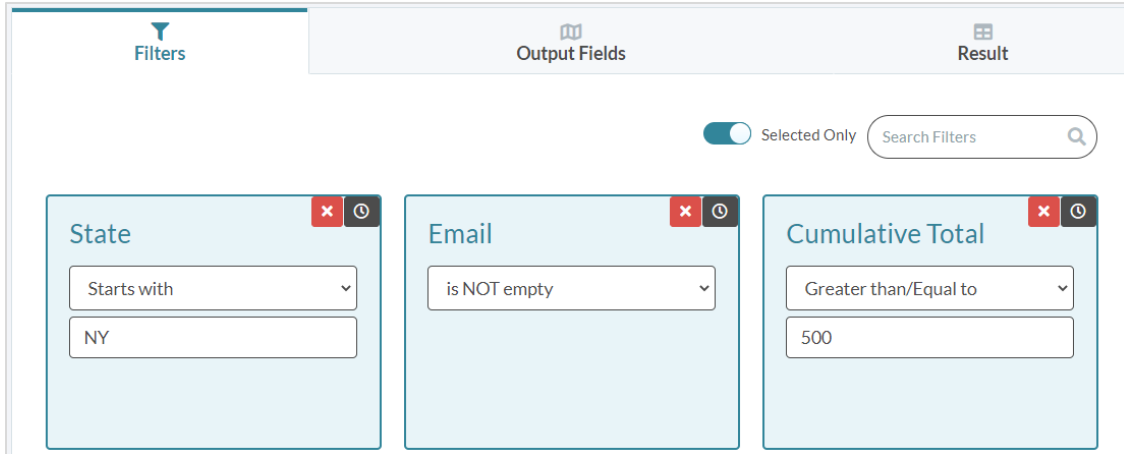
4. Select the desired email platform integration to be enabled for your account:

5. You will be rerouted to your selected platform. Log into the selected platform.
6. Once you have successfully been authorized by the platform, you may start creating new segmentation lists.

How to Upload a List
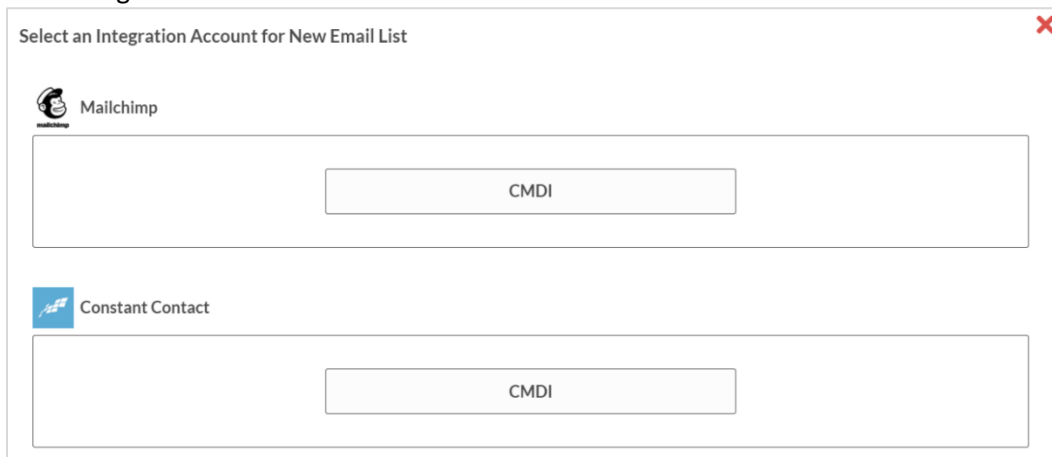
1. Run a People Search using the filters of your choice. Ex:

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2. Choose the "**Create Email List**" menu in form the output options available.
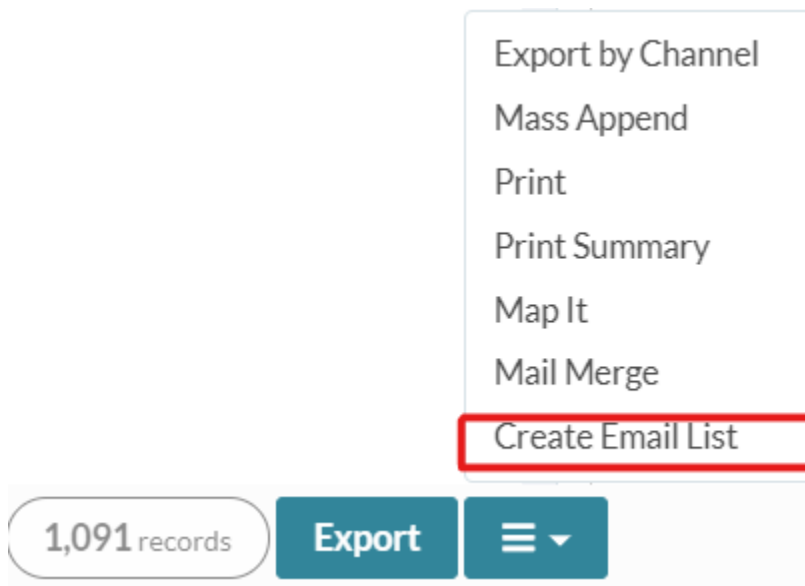
3. Select an integrated Email Platform.

4. Create the new List.

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  o Enter the preferred list name

  o Choose an update type (One-time VS Periodic)

    ▪ If you select Periodic, you can select the preferred intervals of days, hours, or minutes (the list will default to 12 hours if none selected).

  o Select any custom fields you would like to push to your email provider.

5. Click **Save** when done.
6. Once saved, the Julep Email Integration Service will queue will process to upload the subscriber details to the selected email platform.
7. Once the upload is complete, you will receive a Julep Confirmation Notification.
8. You can then check and email the new subscriber list in the email platform selected.

Manage "Periodic" Lists

1. To manage "Periodic" syncing lists, click on the **My Account** dropdown located in the top right corner of Julep and select the **Account** settings option.

2. Click on the [Organization Info] button that appears in the top right corner of the new window.

3. The Organization Info will appear. Click on [Data Integration] at the footer of the screen.

4. Select the enabled email platform integration for review.

5. Click the [Email Lists] button under the correct account to view a list of "Periodic" syncing lists established.

6. View, Edit, or Delete the list as needed.

7. Click [Updates] to see the list of updates made to existing lists.

	List	Type	Status	Started	Completed	Records	Last Log
☰	New York $500+ Donors	Periodic	Started	7/24/20, 5:33:32 PM		1,038	Mailchimp records send finished 100 of 100 operations. 0 failed with errors
☰	Unknown	One-Time	Succeeded	5/6/20, 5:01:27 PM	5/6/20, 5:01:51 PM	1	0 workers failed. Successfully processed 1 of 1 records.
☰	Unknown	One-Time	Succeeded	5/6/20, 4:58:43 PM	5/6/20, 4:59:06 PM	1	0 workers failed. Successfully processed 1 of 1 records.
☰	Unknown	One-Time	Succeeded	5/6/20, 10:07:45 AM	5/6/20, 10:08:07 AM	12	0 workers failed. Successfully processed 12 of 12 records.

List filter, Type filter, Status filter

Hide Filters

« ‹ 1 › » 5 items per page   1-4 of 4 items

8. Filter by list, type, or status or click ☰ to see the update log.

```
7/24/20, 5:40:05 PM  Mailchimp records send finished 100 of 100 operations. 0 failed with errors.
7/24/20, 5:39:04 PM  Mailchimp records send finished 100 of 100 operations. 2 failed with errors.
7/24/20, 5:37:53 PM  Mailchimp records send finished 100 of 100 operations. 1 failed with errors.
7/24/20, 5:37:20 PM  Completed batch of 5 workers.
7/24/20, 5:37:20 PM  Mailchimp records send finished 100 of 100 operations. 0 failed with errors.
7/24/20, 5:36:18 PM  Mailchimp records send finished 100 of 100 operations. 0 failed with errors.
7/24/20, 5:35:18 PM  Mailchimp records send finished 100 of 100 operations. 1 failed with errors.
7/24/20, 5:34:17 PM  Mailchimp records send finished 100 of 100 operations. 16 failed with errors.
7/24/20, 5:33:34 PM  Setup successful
7/24/20, 5:33:32 PM  Change status to S
```