

## 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.

A Home	My Dashboard	Q.	111	<ul> <li>Account</li> <li>i≡ My Reports</li> </ul>
2 People				🗁 Open Other Database
Fundraising		200	765,	Logout
\$ Treasury		(C)	People	Logout
Financial Summary				
🗅 Data Entry				

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

My Account > Organizatio	n Info		← Back				
Organization Info							
Title		Address					
Simms Foundation		7704 Leesburg Pike · Fall	s Church · VA 22043				
Name		Phone					
Simms Foundation							
Project Type		Fax					
501C3	~	(703) 790-9389					
Target Date		Email					
12/06/2017	曲	samaya@cmdi.com					
Target Date Caption		URL http://www.cmdi.net/					
Days to 2017 Nation	nal Day						
Annual Spending Budget							
		2-Factor Authentication					
			\$8,237				
		•	Pledge Outstanding (FTD)				
			8 Gifts				
	Gift Officer Portfolio		Search for Gift Officers				
	12	\$491,626	40				
		Data Integration					

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:

Filters	Output Fields	Result		
		Selected Only Search Filters Q		
Starts with NY	× ⊙ Email is NOT empty  ✓	Cumulative Total Greater than/Equal to v 500		

2. Choose the "Create Email List" menu in form the output options available.

			Export by Channel	
			Mass Append	
			Print	
			Print Summary	
			Map It	
			Mail Merge	
			Create Email List	
	1	.,091 records Export	≡▼	
3.	Sele	ct an integrated Email Platform.		
		Select an Integration Account for New Email List		×
		Mailchimp		
			CMDI	
		Constant Contact		
			CMDI	

4. Create the new List.

Add Email List
List Name
StatStarwith(NY)Emai(NotEmpty)CumuTotaGreathanEqua
Update Type
Periodic: Run this search at regular intervals and send updated records
Update Interval
0   Days   12   Hours   0   Minutes
Custom Fields
Formal Salutation × Street × City × State × Zip × Select Custom Fields

- Enter the preferred list name
- 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).
- 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 W 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 button under the correct account to view a list of "Periodic" syncing lists established.
- 6. View, Edit, or Delete the list as needed.

iodic Lists Updates			
New York \$500+ Donors	Last Update: 7/24/20, 1:33 PM	Update Interval: 12 hours	×
	22276738		Denson

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

st		~	Type		Status		~
▼ Hide Filters	List	Туре	Status	Started	Completed	Records	Last Log
E	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 error
=	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 1 records.
« < 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, 5:37:20 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, 5:35:18 PM Mailchimp records send finished 100 of 100 operations. 1 failed with errors. 7/24/20, 5:33:34 PM Setup successful 7/24/20, 5:33:32 PM Change status to S