Use the Email Scheduler to send Customized Saved Searches and Julep Reports to you and your key staff on a regular basis.

Saved Searches Scheduling

1. First you must select a saved search or create one if it does not exist yet. TO create a new saved search, follow the steps below:
   a) Open either a People Search or a Money Search
   b) Enter your search criteria (Ex: $1000+ donors last month)
   c) Set your preferred Output Fields
   d) Run the report to see current results
   e) OPTIONAL: Select Aggregation settings (Ex: group by People Type)
      o People Search Aggregation Options
      o Money Search Aggregation Options
   f) Save your search criteria
2. To select your saved search to be scheduled, open either a People Search or a Money Search
3. Click on the **Saved Searches** button
4. Find the saved search you would like to schedule to be emailed
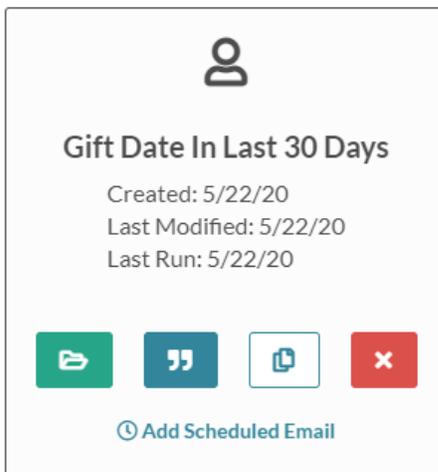
5. Click ⏱ **Add Scheduled Email**
6. Enter the **Start** date and time you want the emails to begin
7. Select the **Runs Every** option preferred
   - Day
   - 2 Days
   - Week
   - 2 Weeks
   - 30 Days
   - Custom
        o This option allows you to select every X number days the report will run

NOTE: The report will run on the days selected at the time you select4ed for the start

8. Click **Save** when done

Julep Reports Scheduling

1. First find the Julep report to be scheduled for emailing and click **Run** ▶

2. Enter any required prompt criteria and then click **Run**

3. Then click ⊙ **Add Scheduled Email**
4. Confirm the **Name** you want the scheduled report to appear as
5. Confirm the **Filters'** criteria selected to be ran

6. Click **Save**
7. Enter the **Start** date and time you want the emails to begin
8. Select the **Runs Every** option preferred
   - Day
   - 2 Days
   - Week
   - 2 Weeks
   - 30 Days
   - Custom
        o This option allows you to select every X number days the report will run
   NOTE: The report will run on the days selected at the time you selected for the start

9. Click **Save** when done

Use Case Example

Needed: List of donors potentially needing to be reported on a 48-hour report.

Steps to Setup:
1. Open Money Search
2. Under the **Gifts** Filter Group > **Gift Amount** filter enter "Greater than/Equal to" "$1,000.00".
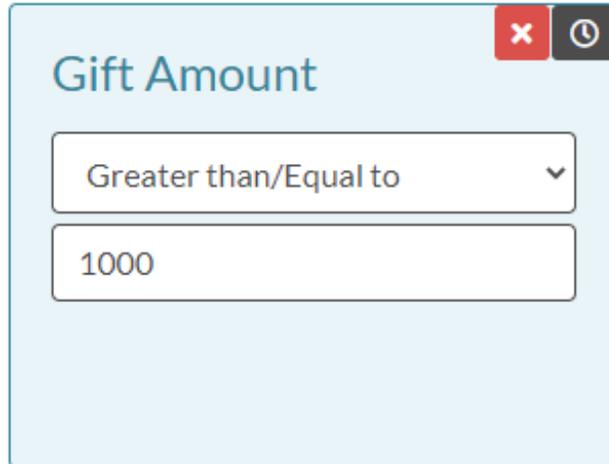
3. Under the **Gifts** Filter Group > **Entry Date** filter select "Yesterday".
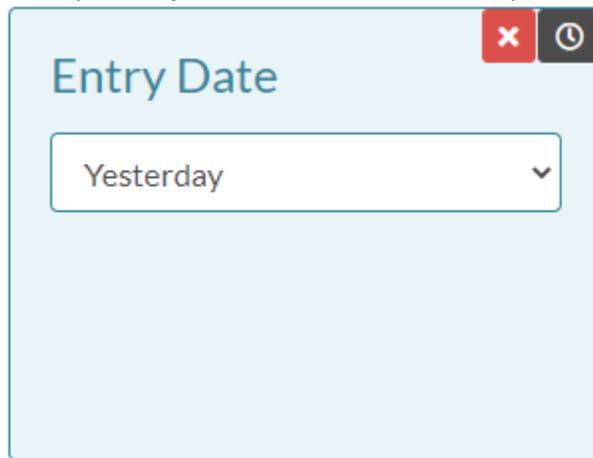
4. Set your preferred Output Fields
5. Run the report to see current results
6. [Save your search criteria](#)
7. From the saved search settings, click **Add Scheduled Email**
8. Enter the **Start** date and time you want the emails to begin
9. Then select the **Runs Every** option preferred

10. Click **Save** when done.

Scheduled Emails Management

To view and manage all scheduled saved searches and/or Julep reports, go to the search menu or All Reports menus.

Click on the ⏱ **Add Scheduled Email** button to view all scheduled saved searches.

Scheduled Email Reports

Gift Date In Last 30 Days   ✏ Edit ✕ Delete

Runs every 24 hours
Start: 3/26/21, 3:42 PM
Last run: None

Click on the ✏ **Edit** button to update the settings for your email scheduled report.

Click on the ✕ **Delete** button to cancel your email scheduled report.