Attributes

Attributes help you categorize People Records based on their involvement with your nonprofit. For example, you can use Attributes to identify active/inactive Volunteers, Major Donors, Grassroots Organizers, and more. Attributes are completely customizable so that you can easily identify the correct label for each record in your database.

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

- **Attribute Category –** This tells the end user the nature of the attribute. For example:
  - Volunteer
  - Major Donor
  - Staff
- **Attribute –** This identifies the exact relationship of the People Record. For example
  - **Volunteer**
    - Events
    - After School Program

Setting up Attribute Codes

In order to organize your records, you must first create the attributes and the attribute categories. Note: **Julep** does come with 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 **Attribute tab.**

   - To easily see all **Attributes**, before viewing **Categories**, click **Show All Attributes** . If the Attribute Category already exists, skip to Step 6 to add **Attributes**.

2. A list of existing **Attribute Categories** will appear so that you can view and manage. Click the **Add** button to setup a new Attribute Category.

	Attribute Category	Labeling	Note
✏ ✖	Volunteer	Attribute and Category (e.g. Event Volunteer)	
✏ ✖	Participant	Attribute Only (e.g. Staff)	
✏ ✖	Mission Connection	Attribute Only (e.g. Staff)	
✏ ✖	Sponsor	Attribute Only (e.g. Staff)	
✏ ✖	Staff / Org	Category and Attribute (e.g. Prospect Donor)	
✏ ✖	Press	Category and Attribute (e.g. Prospect Donor)	
✏ ✖	Vendor	Attribute Only (e.g. Staff)	
✏ ✖	Govt Officials	Category and Attribute (e.g. Prospect Donor)	

Add | Show All Attributes
Search Attribute Category

« ‹ 1 2 › »   1-8 of 14 items

3. To add, fill out the **Attribute Category** and select a **Labeling** order.
    - Labeling will determine how the Attribute is displayed elsewhere in Julep. For example, "Category - Attribute" will always put the Attribute Category first, followed by a hyphen and then the Attribute (eg Volunteer – Phone Banking).
4. Click **Save** when done.
5. Next, to add the **Attributes**, first select the respective **Category** by clicking [✏️].
6. Then click [**Show All Attributes**] in the **Edit Attribute Category** window.
7. Click [**Add**] and add the **Attribute Name** and Note, if desired:

Attribute

Note

8. Click **Save** when done.

Assigning Attributes to People Records

When in a **People Profile**, you can assign **Attributes**, and other helpful codes. Simply click on the **Codes** panel box, and you will be defaulted to the **Attributes** tab.

Codes ⚙️

Attributes
Member
Flags
DNM BRD
Keywords
BOARD MEMBER
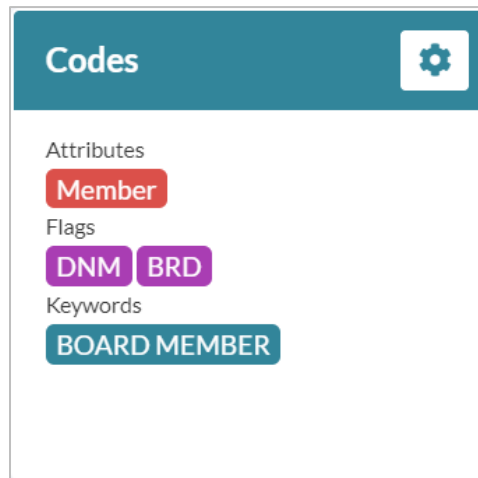
- From here, select any of the available **Attributes** and use the [➜] icon to assign it.
- Select from assigned **Attributes** and use the reverse arrow to remove an Attribute.
- The item in a green label is the attribute's **Category**.
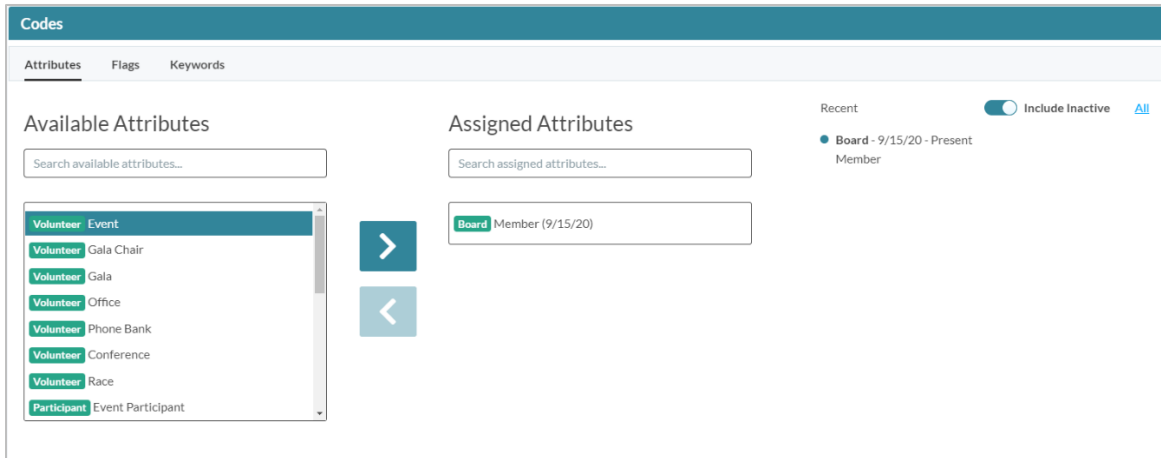
- Once an **Attribute** is assigned, it will be added to the **Recent** list on the right-hand side.
- Use the **Include Inactive** toggle to remove or include inactive **Attributes**.
- To access the additional **Attribute** features, select the assigned Attribute from here.
- In the edit window, you can adjust the **Start** and **End Dates** by typing or using the calendar tool.
- The **Attribute** will default to **Active** or **Inactive** depending on if there is an End Date and if that date has passed. You can override this by clicking the toggle.
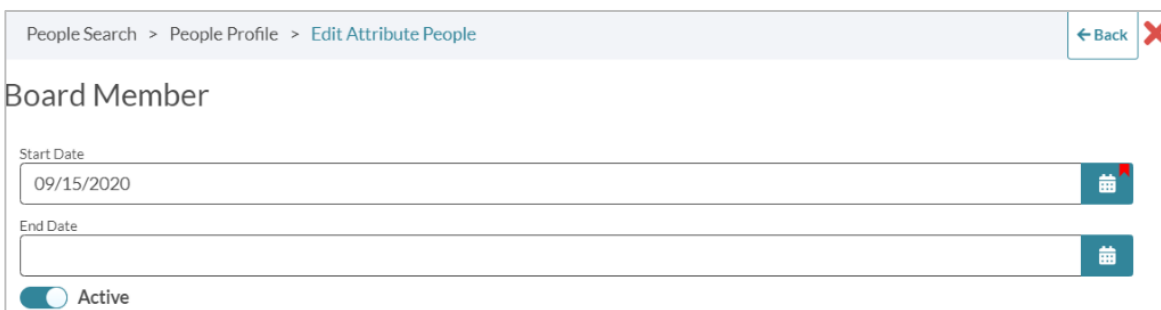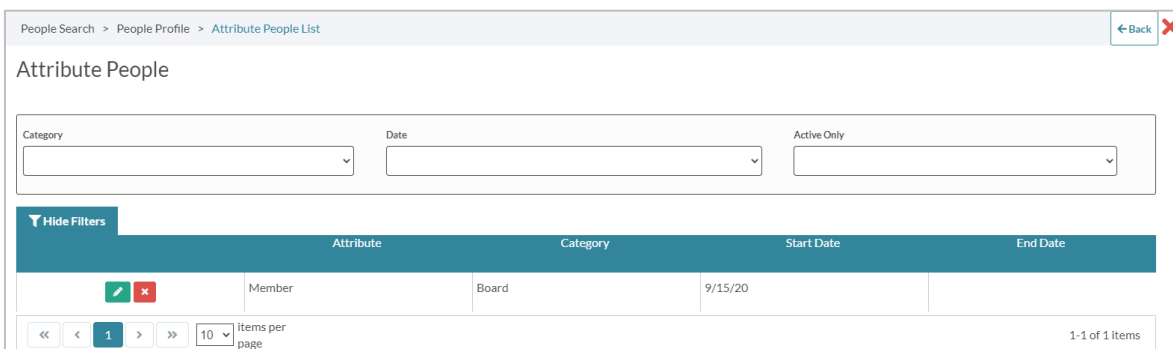

- Lastly, to view all assigned **Attributes** in a list view, click **All** to the top right of the Recent list. From here, you can use the filters to sort, delete, or open one for editing.

Mass Append – People Search

You can use Julep's **Mass Append** feature to append Attributes to a set of **People Search** results.

1. Run your desired People Search and then select **Mass Append** (next to **Export**).

2. From the new window, click the **Attribute** tab.

3. From here, use the lookup tool to find the **Attribute**.

4. Enter the start and end dates, and when finished click **Submit** .

Import – New Contacts or New Gifts

When importing an Excel as part of a New Gift, New Contacts, or Append import, follow the same import process as you normally would for a **New Contacts** or **New Gifts** Import, but add the following columns to be able to import **Attribute** information:

- **Attribute Name** – Put the Attribute name here, just the name not the Category.
  - NOTE: The Attribute must exist in **People Settings** first to be able to import.
- **Attribute Start Date** – This is for the Start Date.
- **Attribute End Date** – This is for the End Date, not required.
- **Attribute Active** – Julep will either assume based on date information, or you can use a Y for active or N for inactive.