
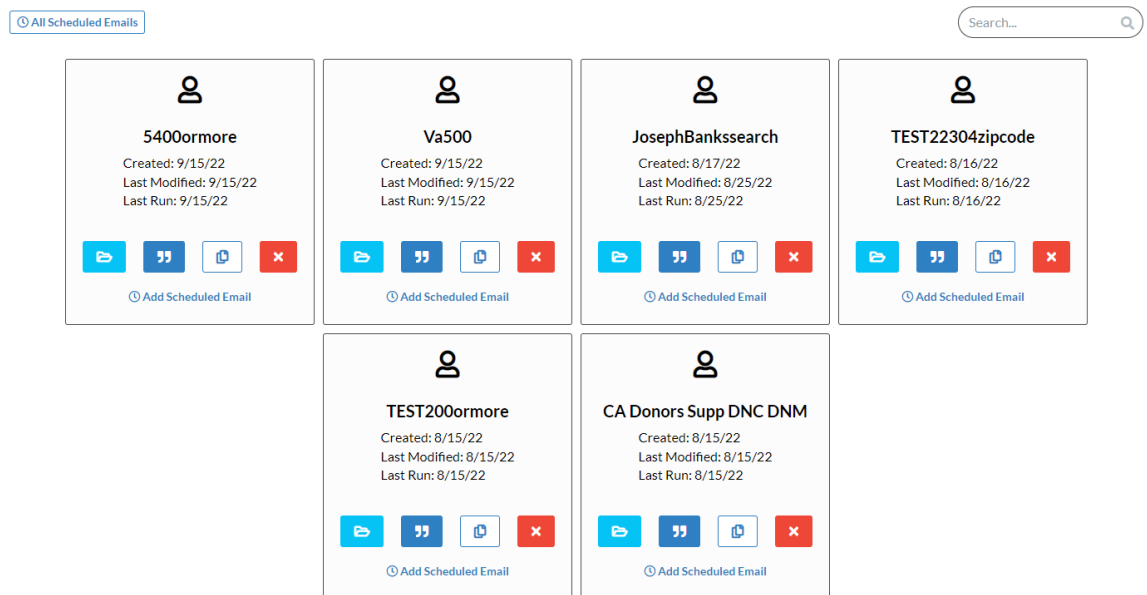


Use the Email Scheduler to send Customized Saved Searches and Crimson Reports to you and your key staff on a regular basis.

Saved Searches Scheduling


- 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:
 - Open either a [People Search](#) or a [Money Search](#)
 - Enter your search criteria (Ex: \$1000+ donors last month)
 - Set your preferred Output Fields
 - Run the report to see current results
 - OPTIONAL: Select Aggregation settings (Ex: group by People Type)
 - [People Search Aggregation Options](#)
 - [Money Search Aggregation Options](#)
 - [Save your search criteria](#)
- To select your saved search to be scheduled, open either a [People Search](#) or a [Money Search](#)

- Click on the  button
- Find the saved search you would like to schedule to be emailed



The screenshot shows a web interface for managing saved searches. At the top left, there is a tab labeled "All Scheduled Emails". To the right is a search bar. Below these are six search cards arranged in two rows of three. Each card contains a person icon, a search name, creation/modification/run dates, and a set of four action buttons (email, quote, print, delete). At the bottom of each card is a blue button with a clock icon and the text "Add Scheduled Email".

Search Name	Created	Last Modified	Last Run
5400ormore	9/15/22	9/15/22	9/15/22
Va500	9/15/22	9/15/22	9/15/22
JosephBankssearch	8/17/22	8/25/22	8/25/22
TEST22304zipcode	8/16/22	8/16/22	8/16/22
TEST200ormore	8/15/22	8/15/22	8/15/22
CA Donors Supp DNC DNM	8/15/22	8/15/22	8/15/22


- Click 
- Enter the **Start** date and time you want the emails to begin
- Select the **Runs Every** option preferred
 - Day
 - 2 Days
 - Week
 - 2 Weeks

- 30 Days
- Custom
- 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




8. Click  when done

Crimson Reports Scheduling

1. First find the Crimson report to be scheduled for emailing and click 
People Reports

Search report #, name, or description

#891 New Donors added by Month A break-down of new donors added by month-wise and total   	#9113 ☆ Short First Names Outputs records with one or two character first names. Will suppress donors with SLN flag   	#9112 Short Last Names Outputs records with one or two character last names. Will suppress donors with SLN flag   	#9920 Leadership PAC Tracker Leadership PAC Tracking Report- For tracking which Senate LPACs have given to your campaign. Needs to be set up by CMDI- please contact Customer Support   
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2. Enter any required prompt criteria and then click 
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 
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
- 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

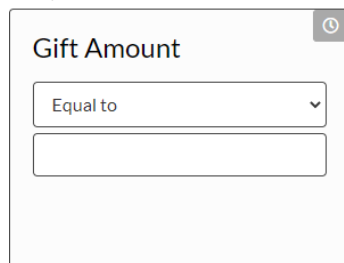
9. Click  when done

Use Case Example

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

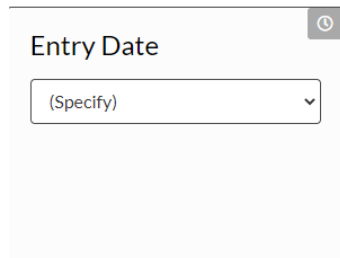
Steps to Setup:

1. Open [Money Search](#)
2. Under the **Gifts** Filter Group > **Gift Amount** filter enter “Greater than/Equal to” “\$1,000.00”.




The screenshot shows a filter configuration box titled "Gift Amount". At the top right of the box is a small grey button with a power icon. Below the title is a dropdown menu currently set to "Equal to". Underneath the dropdown is an empty text input field for entering a value.

3. Under the **Gifts** Filter Group > **Entry Date** filter select “Yesterday”.





The screenshot shows a filter configuration box titled "Entry Date". At the top right of the box is a small grey button with a power icon. Below the title is a dropdown menu currently set to "(Specify)".

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 
8. Enter the **Start** date and time you want the emails to begin


9. Then select the **Runs Every** option preferred
Add Scheduled Email for CA Donors Supp DNC DNM



An email containing the results of this search will be sent to you according to the schedule defined below.


Start At (Eastern Time)

11/8/2022  10:54 AM 

Runs Every

Day 

10. Click  when done.

Scheduled Emails Management



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

Click on the  [Add Scheduled Email](#) button to view all scheduled saved searches.


Add Scheduled Email for CA Donors Supp DNC DNM



An email containing the results of this search will be sent to you according to the schedule defined below.

Start At (Eastern Time)


11/8/2022  10:54 AM 

Runs Every

Day 

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

Click on the  button to cancel your email scheduled report.