

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

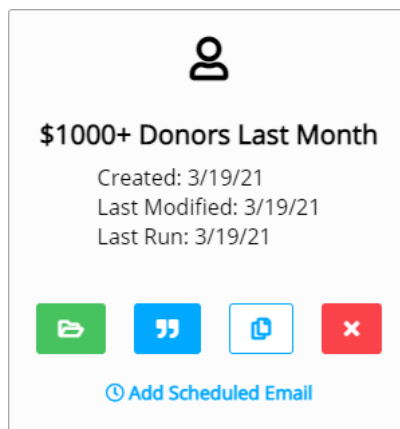
Saved Searches Scheduling

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](#)

Saved Searches

3. Click on the 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

Save

8. Click when done

Crimson Reports Scheduling

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



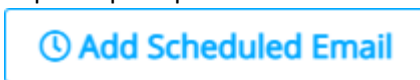
The screenshot shows the 'All Reports' section of the Crimson Reports interface. At the top right, there are buttons for 'Create Report', 'Export', and 'Reports Usage'. Below the title 'All Reports' is a search bar labeled 'Search report #, name, or description'. Three report cards are displayed:

- #305**: Money Type Gross Detail Report. Description: 'Details for transactions by payment type as they were originally keyed'. Action buttons: Edit, Remove from My Reports, Run.
- #3044**: Daily Totals by Money Type with Adjustments. Description: 'A breakdown of deposited money by date and payment type for the date range selected. (Including adjustment types: Chargebacks, Partial Chargebacks, Debits)'. Action buttons: Edit, Remove from My Reports, Run.
- #217**: Income Report Summary by Fund-Account Code. Description: 'Enter a date range and a breakdown of gift and money totals by fund code account code ... also displays initiative (package) code'. Action buttons: Edit, Add to My Reports, Run.

2. Enter any required prompt criteria and then click



3. Then click



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 select4ed for the start

9. Click

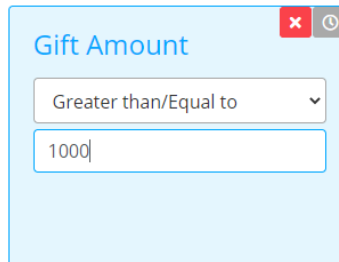


Use Case Example

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

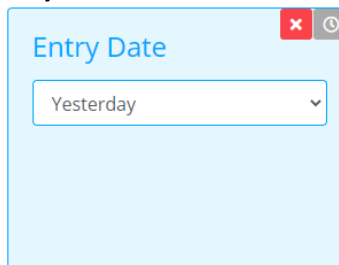
Steps to Setup:

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



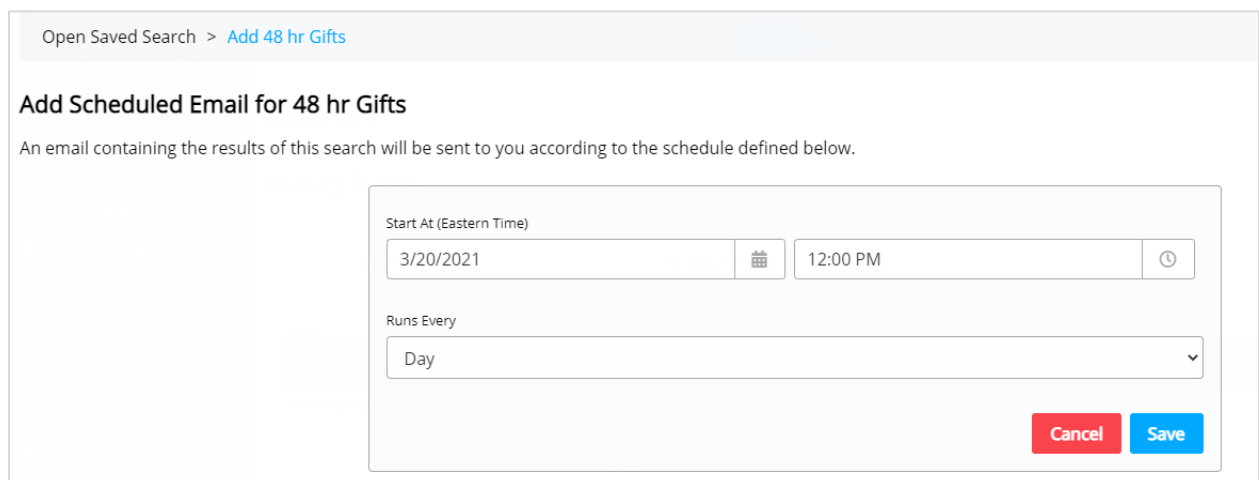
A light blue dialog box titled "Gift Amount" with a red close button and a refresh icon. It contains a dropdown menu with "Greater than/Equal to" selected and a text input field containing "1000".

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



A light blue dialog box titled "Entry Date" with a red close button and a refresh icon. It contains a dropdown menu with "Yesterday" selected.

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



The dialog box is titled "Add Scheduled Email for 48 hr Gifts" and includes the breadcrumb "Open Saved Search > Add 48 hr Gifts". Below the title, it states: "An email containing the results of this search will be sent to you according to the schedule defined below." The form contains two sections: "Start At (Eastern Time)" with a date field set to "3/20/2021" and a time field set to "12:00 PM", and "Runs Every" with a dropdown menu set to "Day". At the bottom right, there are "Cancel" and "Save" buttons.





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  button to view all scheduled saved searches.

Scheduled Email Reports

<p>#3044: Daily Totals by Money Type with Adjustments  </p> <p>Runs every 48 hours Start: 3/19/21, 12:00 PM Last run: None</p>	<p>\$1000+ Donors Last Month  </p> <p>Runs every 24 hours Start: 3/19/21, 12:00 PM Last run: None</p>
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Click on the  button to update the settings for your email scheduled report.

Click on the  button to cancel your email scheduled report.