People Profile

You can use the **Quick People Search** or full **People Search** to find, view, and edit a People record. To learn more about the quick searches and search features in Julep, see the **Julep – Quick Searches** guide or **Julep – Search Features** guide on our HelpDesk.

The **People Profile** in Julep segments data into separate panels and includes summary information in each. When a panel is selected, the lower half of the profile displays that panel's summary details and analytics as well as the list of the records that are being summarized.

Below shows how to edit a people record and the features in the **Giving History** panel. To learn more about all of the panels in a People Profile in detail, see the **Julep – People Profile Panels Details** guide on our HelpDesk.

Edit a Record's Profile Fields

- Click the **Individual** or **Organization** panel to open the **Edit Record** screen. The information shown in these panels depends on the **People Type** selected for the record.
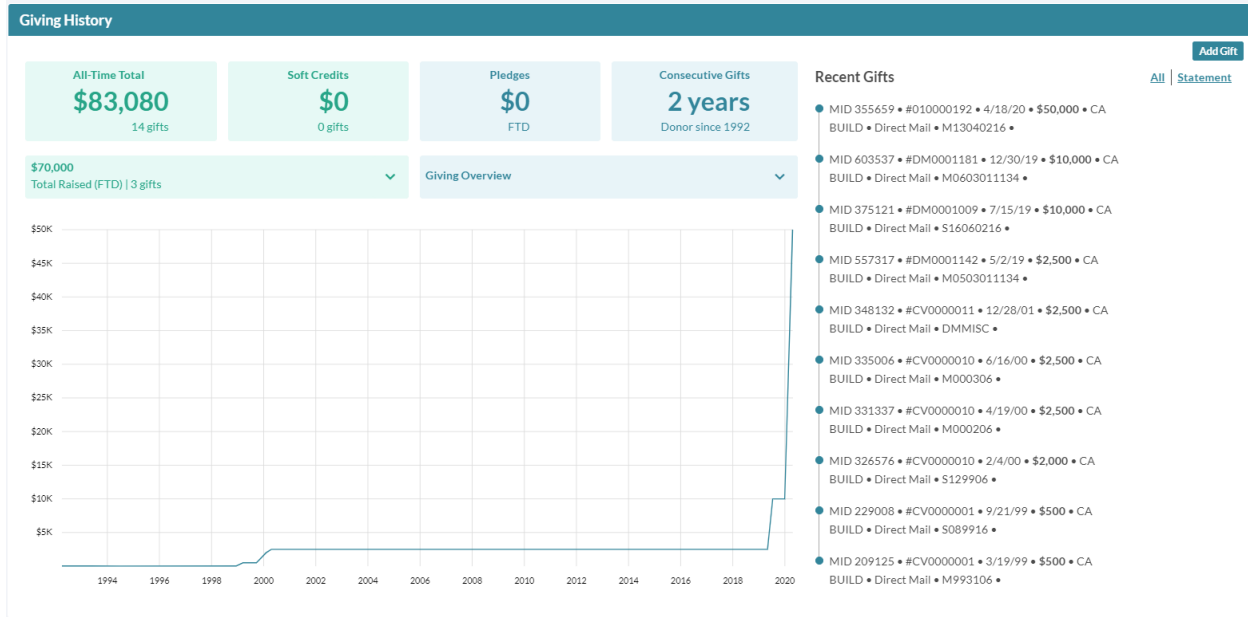

- The majority of the fields will open in a fully editable format as displayed above. When you have made all appropriate changes, click the **Save** button at the bottom right. Click the **Cancel** button to undo any changes made without saving. You can exit the **Edit Record** screen by clicking the red **X** at the top right.

Giving History

- In the **Giving History** panel, you will see the **Fiscal-to-Date** total with the number of gifts that equal that amount and the **Most Recent** contribution amount and date.

- Click the ✚ button to add a new gift under the people profile. Once you have added the contribution information in the new money screen, press the **Save** button.

- When you click within the **Giving History** panel, the lower left side of the panel summary will display a visualization of total contribution history and analytics such as totals by All-Time, Soft Credits, Pledges, and Consecutive years given while the right side of the panel summary will display a list of **Recent Gifts**.

Giving History

All-Time Total	Soft Credits	Pledges	Consecutive Gifts
$83,080	$0	$0	2 years
14 gifts	0 gifts	FTD	Donor since 1992

$70,000
Total Raised (FTD) | 3 gifts

Giving Overview

Recent Gifts   All | Statement

- MID 355659 • #010000192 • 4/18/20 • **$50,000** • CA BUILD • Direct Mail • M13040216 •
- MID 603537 • #DM0001181 • 12/30/19 • **$10,000** • CA BUILD • Direct Mail • M0603011134 •
- MID 375121 • #DM0001009 • 7/15/19 • **$10,000** • CA BUILD • Direct Mail • S16060216 •
- MID 557317 • #DM0001142 • 5/2/19 • **$2,500** • CA BUILD • Direct Mail • M0503011134 •
- MID 348132 • #CV0000011 • 12/28/01 • **$2,500** • CA BUILD • Direct Mail • DMMISC •
- MID 335006 • #CV0000010 • 6/16/00 • **$2,500** • CA BUILD • Direct Mail • M000306 •
- MID 331337 • #CV0000010 • 4/19/00 • **$2,500** • CA BUILD • Direct Mail • M000206 •
- MID 326576 • #CV0000010 • 2/4/00 • **$2,000** • CA BUILD • Direct Mail • S129906 •
- MID 229008 • #CV0000001 • 9/21/99 • **$500** • CA BUILD • Direct Mail • S089916 •
- MID 209125 • #CV0000001 • 3/19/99 • **$500** • CA BUILD • Direct Mail • M993106 •

Add Gift

- Click the arrows on the cards on the left side to display dropdowns showing more information. The left dropdown will display Total Raised (FTD), amount raised Last Fiscal Year, and amount raised Two Fiscal Years Ago. The right dropdown will display
- The Graph will display contributions over time. Hovering over the graph along the line will show information on each contribution.
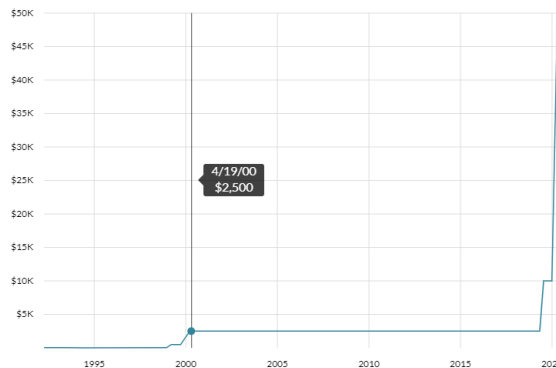
- When you click a recent gift on the right side of the panel summary, it will open that contribution record so you can view and/or edit money details.

- Click **All** to see all live gifts or **Statement** to see gifts that may no longer be live along with the adjustments that have been applied such as refunds or chargebacks.

Tran#	Date	Amount	Fund	Account Code	Chapter Credit	Source	Package	Program	Track#	Pay Ty
355659	4/18/20	$50,000	BUILD		2120	M13040216	DMISC	Direct Mail	0	CA
603537	12/30/19	$10,000	BUILD		2120	M0603011134	D06M03	Direct Mail	0	CA
375121	7/15/19	$10,000	BUILD		2120	S16060216	DMISC	Direct Mail	0	CA
557317	5/2/19	$2,500	BUILD		2120	M0503011134	D05M03	Direct Mail	0	CA
348132	12/28/01	$2,500	BUILD		2120	DMMISC	DMISC	Direct Mail	0	CA
335006	6/16/00	$2,500	BUILD		2120	M000306	DMISC	Direct Mail	0	CA
331337	4/19/00	$2,500	BUILD		2120	M000206	DMISC	Direct Mail	0	CA
326576	2/4/00	$2,000	BUILD		2120	S129906	DMISC	Direct Mail	0	CA
229008	9/21/99	$500	BUILD		1120	S089916	DMISC	Direct Mail	0	CA
209125	3/19/99	$500	BUILD		1120	M993106	DMISC	Direct Mail	0	CA

- When viewing all gifts in a people record, you will see a table that summarizes the totals that donor has given to active fund codes.

- You can filter by **Fund** code, **Source** code, **Program** code, and/or **Date** in the **Gifts** view to specify which gifts you would like to view.

- You can filter by **Fund** code, **Adjustment Type**, **Batch Date**, and **Adjustment Date** in the **Statement** view to specify which gifts you would like to view.

- Click the button to view/edit a gift, click the button to delete a gift, or click the button to download a receipt. To export gifts to an Excel file, press the **Export** button.