



## 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.

**Individual**

Occupation: CEO  
Employer: Joseph Banks LLC  
Spouse: Ellen Banks  
Chapter: n/a  
Assigned Gift Officers: n/a

**Codes**

Flags: WILL, WEBML, EMAIL0704, DMONLINE, DMDONOR, 5+  
Keywords: Event Attendee, BOARD MEMBER, ACKNOWLEDGE

**Giving History**

Fiscal-to-Date: \$70,000 (3 gifts)  
Most Recent: \$50,000 (04/18/2020)

**Move Management**

1 Moves

**Tasks**

2 Outstanding  
04/30/20 (Call.) | Call

**Actions**

- Apr 30, 2019 Volunteer - Office - IT Support
- Apr 30, 2019 Volunteer - Office - IT Support
- Apr 30, 2019 Volunteer - Office - IT Support

**Notes**

- Jul 10, 2019 Call the Grant's
- Jun 26, 2019 Follow Up on Dinner Event
- Dec 06, 2018 Call to invite to lunch

**Events**

6 Events Invited To

- 08/09/2018 (EVCIGNAFAL18) Falmouth 2018 Invited
- 05/17/2017 (EVGRNYL18) Long Island 2018 Invited

**Giving History Summary**

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

**Recent Gifts**

- 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 • M060301134 •
- 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 • M050301134 •
- 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 • 9/2/99 • \$500 • CA BUILD • Direct Mail • S089916 •
- MID 209125 • #CV0000001 • 3/19/99 • \$500 • CA BUILD • Direct Mail • M993106 •

## 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.

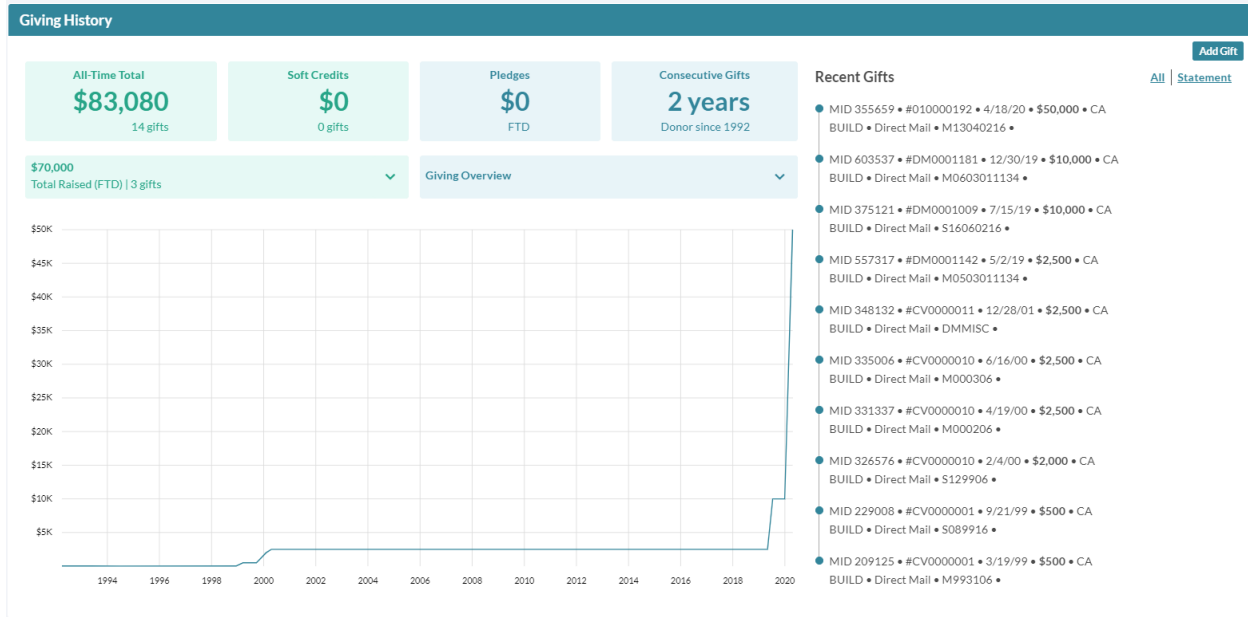
Individual	Organization
Occupation	Type of Organization
Employer	Foundation
Spouse	Industry Category
Chapter	Created On
Connecticut	07/19/2002
Assigned Gift Officers	EIN#
	Chapter
	Heartland - IN & KY

Profile	Contact
Type Individual	Home Phone (123) 456-7890
Code Donor	Cell Phone (724) 393-1999
Assign Gift Officer 11111 - Sofia Amaya Select Gift Officer(s)	Work Phone (717) 888-9172
Chapter - n/a	Fax 404.393.7654
Industry	Email Address
Prefix Mr.	Website www.cmdi.com
First Name Joseph	Facebook https://www.facebook.com/cmdi.crimson
Middle Name M.	Twitter https://twitter.com/CrimsonCRM
Last Name or Company/Organization Banks	Assistant Phone (###) ###-####
Suffix Sr.	Assistant Email Address joegrant@joegrant12A3.com
Spouse Ellen Banks	
In Memory of (2)	
Gift Officer Tracking#	Address Type Home
Occupation CEO	Find an Address Enter a location
Employer Joseph Banks LLC	Street 1593 Spring Hill Rd
Formal Salutation Mr. Banks	Suite 400
Informal Salutation Joe	Additional Address Line
Mail Salutation Mr. & Mrs. Banks	City Vienna
Mail Name Joe and Ellen	State / Zip / Plus4 VA 22182
Primary Mail Record	Country United States
DOB 01/01/1969	
Title	
Assistant Tina Johnson	

- 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**.

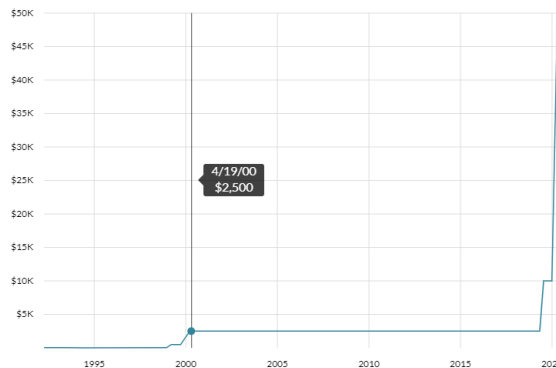


- Click the arrows on the cards on the left side to display dropdowns showing more information. The left dropdown will display Total Raised (FTD), amount raised Last Fiscal

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.

Gifts Statement

Mr. Joseph M. Banks, Sr. —





Fund	Total	Remaining
BUILD	\$50,000	
TOTAL	\$50,000	

Spouse: Ms. Ellen A. Banks

Fund:  Source:  Program:  Date:

Hide Filters

Trans#	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
948132	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  button.