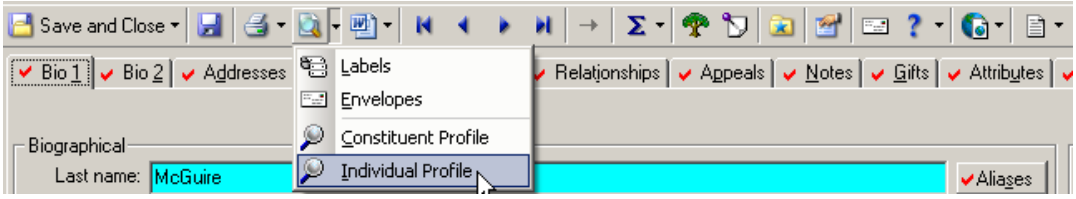
Constituent, Individual and Organization Profile Reports

Profile reports summarize information contained in our Constituent records. This document describes how you can run and export Constituent, Individual Profile and Organization reports in Raiser's Edge. It concludes with a brief description of a few basic Profile reports you can tweak for your own use.

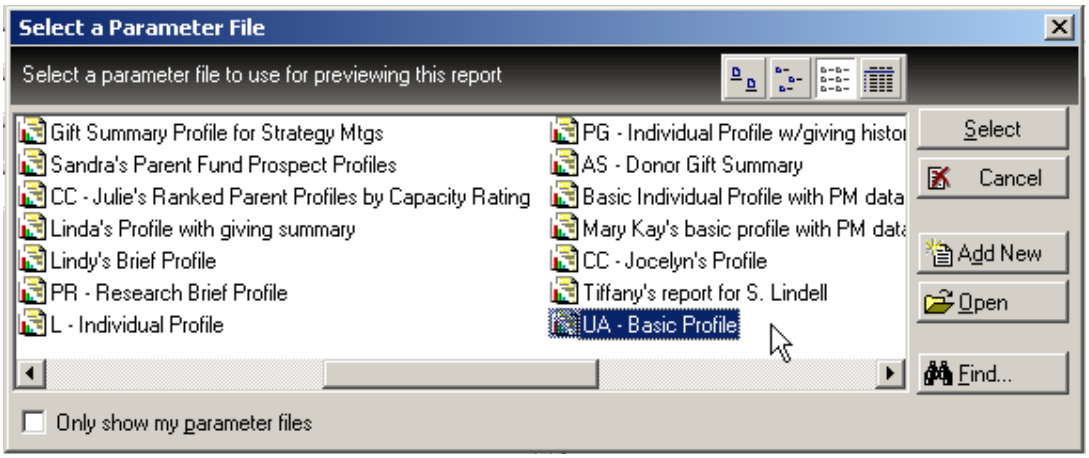
Running a Profile Report from a Constituent Record

Profile reports may be run from the Reports screen by navigating to Reports>Profiles, Lists and Directories and selecting either Constituent Profile, Individual Profile or Organization Profile. A quicker method for accessing these reports through a Constituent record is explained below:

1. Find and open the Constituent record you want to run a profile for.
2. Click the down arrow to the right of the Preview icon at the top of the Constituent record screen and select the desired Profile type (Constituent, Individual or Organization). Constituent Profile will always be available. You will see Individual or Organization, depending on the type of record you are looking at:

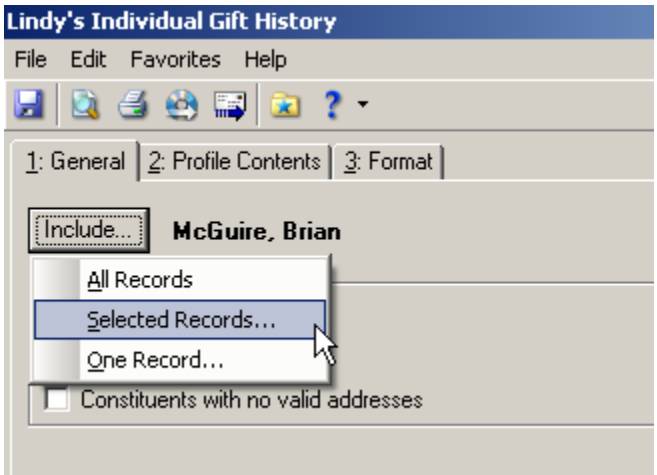


3. Double-click the desired Profile report from the Parameter File window:



You may view profile for more than one Constituent record at a time. To do so, do not double-click the Profile report name as stated in step 3. Instead:

1. Highlight the Profile report name by single-clicking it and then click the “Open” button.
2. Click the “Include” button on the Profile Report window, click “Selected Records…” and search for a query containing the records you want to view the profiles for:



It is important to note that Individual profiles will only work with Individual Queries. Organization Profiles will only work with Organization Queries. Constituent Profiles offer the greatest flexibility in that they can use Individual, Organization or Constituent queries.

Once a Profile Report is run, Raiser’s Edge generates a pdf-like document. Profile reports can sometimes be fairly long. Before printing, always check to see how long the report is by viewing the last page of the document. To do so, click the “Goto last page” icon from the top of the report:

Once the last page is viewed, you will see the number of pages included at the top of the report.

Exporting a Profile Report

Profile Reports are exported the same way as other Raiser's Edge reports:

1. Generate your report as previously outlined
2. Click the Export Icon at the top of the report:

3. An Export window will open. In the format box, choose "Word (Exact) Format" for a Word document or "Acrobat Format (PDF)" for a pdf document. Note that exported Word documents are not easily edited. In the Destination box, leave "Disk File" selected, and then click the "OK" button.
4. Name your file and choose a convenient place on the network or your computer to save your exported report.

Basic Profile Report Starters

The following section describes two Individual Profile reports you can use or modify for your own needs. You may open these reports, make changes to them as needed, and then choose the "Save As" option to save them as your own custom report.

In the tables below, the "Data" column represents different sections of the report. The corresponding "Notes" column displays notes about each data section.

UA – Basic Profile

Data	Notes
Name	Name, preferred address, home/business/cell phone number and email
Biographic Information	Items found on the Bio1 and Bio2 tabs of an Individual's record including: nickname, birth date, gender, marital status, etc.
Constituent Codes	All Constituent codes that pertain to Individuals
Spouse Information	Name, age, maiden name and preferred address for the Individual's spouse
Individual Relationships	One name listing
Education/Schools	One line listing for each school attended. This includes non SU schools
Solicit Codes	Any solicit codes present on the Individual's record
Business Information	One line listing for the Primary Business Relation
Assigned Solicitors	All current and past solicitor assignments
Notes	All briefing biography notes
Giving History	Date, gift type, fund designation and amount for all gifts
Contacts This Quarter	Completed contact report type actions from this quarter
Contacts Last Quarter	Completed contact report type actions from last quarter
Advisory Board Membership	All current and past Advisory Board memberships
Event Participation	One line listing of each event participation (attended or not)

Basic Individual Profile with PM Data

Data	Notes
Name	Name, preferred address, all phones and emails
Biographic Information	Items found on the Bio1 and Bio2 tabs of an Individual's record including: nickname, birth date, gender, marital status, etc.
Constituent Codes	All Constituent codes that pertain to Individuals
Solicit Codes	Any solicit codes present on the Individual's record
Assigned Solicitors	All current and past solicitor assignments
Prospect Information	Top 20 status and prospect classification
Proposals	All proposals, active and inactive
Prospect Ratings	All prospect ratings including research capacity ratings and Blackbaud Target Analytics ratings
Businesses	One line listing of all Business relations, both current and former
Spouse Information	Name, age, maiden name and preferred address for the Individual's spouse
Education/Schools	One line listing for each school attended. This includes non SU schools
Actions	One line listing for every action, completed or not, since 7/1/2004
Giving History	Date, gift type, fund designation and amount for all gifts