Relationship Profile

The **Relationship Profile** summarizes key information about a constituent and puts it in one place for you. Three primary sections make up the Relationship Profile.

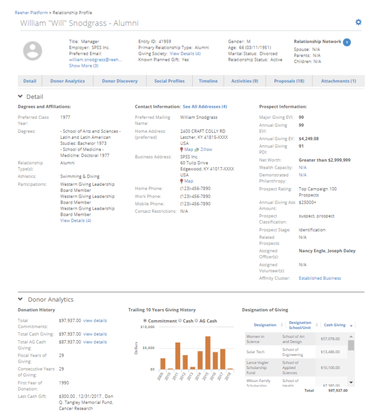
Constituent information can be found in the top section of the profile where essential information like name, preferred contact information, primary relationship type and status, gender, employment, age, marital status, and spouse information are displayed. In addition, the constituent's **Relationship Network** can also be viewed. This section displays the spouse, parents, and children of the constituent. The blue circle next to the Relationship Network displays the number of related constituents. You can click on the circle to see all the related constituents along with the type of relationship, the related constituents' school of graduation, and their class year.

All users will always have access to the content shown in top two sections of Relationship Profile, but the content provided in the **Tabs** of the Relationship Profile can be controlled through the Profile tool in Control Panel.

Related Videos

- Relationship Profile Overview
- Predictive Models Overview

More Videos



Detail

- **Degrees and affiliations** includes preferred class year, Degrees, all Relationship Types, Athletics (NCAA only), and the most recent participations (events, clubs, boards, etc.). Click *View Details* to see a detailed list of all the constituent's participations.
- **Contact information** includes home and business addresses, phone numbers, and contact restrictions. Clicking on the *Map* or *Zillow* links will take you to the address on Google Maps or Zillow.com. Click the "See All Addresses" link at the top to view additional addresses (e.g. Seasonal) for this constituent.
- **Prospect information** includes all of the constituent's Predictive Scores and Net Worth as well as assignment and prospect information provided to Fundraiser Performance Management by your institution.

Donor Analytics features the constituent's donation history and trends, a chart of the trailing 10 years of giving, and a table displaying a summary of the donor's designations.

Donor Insights - Automatic Screening displays the results of the platform automatically performing a wealth and philanthropy screening of this entity with Donor Search. This section will only display if your institution has enabled the Automatic Screening feature.

Click here for more information on the Platform's Automatic Screening with Donor Search feature.

Donor Insights - Social Profiles allows you to view and link a constituent's LinkedIn, Twitter, and Facebook profile. If your institution has enabled the Clearbit integration, the Platform will match social profiles automatically based on the constituent's email address. Typically, 40-60% of email addresses will return a match. You can also link profiles manually by pasting in the URL for the constituent's LinkedIn, Twitter, or Facebook profile.

Click here for more information on the Platform's automatic social media integration with Clearbit.

Donor Discovery is a Fundraiser Performance Management best practice module, powered by wealth and philanthropy profile screening from DonorSearch, and is fully integrated with Fundraiser Performance Management. Donor Discovery provides immediate, on-demand access to detailed wealth screenings so front-line fundraisers can have current and reliable data as they prepare to meet with a prospect or prepare a proposal. By providing the right information at the right time, Donor Discovery helps gift officers create more informed prospect strategies, yielding greater proposal success.

Learn more about Donor Discovery and about requesting a free 30-day trial by clicking here.

Timeline is an interactive module that displays the various interactions that have occurred with this constituent. These include appeals they have received, donations they've made, officer activities or contacts, participations, and proposals. These interactions are color coded and appear on the timeline in the date that they occurred. You can add or remove any interactions using the drop-down menu in the top right. You can also click and drag the timeline left and right to view other time periods as well as zoom in and out using the buttons in the top left to change the time frame. Clicking on any of the interaction bubbles will give you the full detail for each.

Activities displays all officer contact reports and activities related to the constituent. Click on the *Activity ID* to see the full detail for that activity. If your institution has subscribed to Fundraiser

Performance Management's best practice module, Activity Center, then you can create Contacts and Tasks with the Platform directly from the Relationship Profile using the Add Contacts and Add Tasks buttons.

Proposals displays all proposals, both open and closed, related to the constituent. Click on the *Pro posal ID* to see that proposal's detail page.

Attachments allows users to upload and share files of information with other users in regards to the constituent. All uploaded attachments are only able to be accessed via the Platform. Any uploaded attachments are not synced back to your donor database.

To upload a picture of the constituent using the functionality on the Attachments Tab, simply upload your image then select the action called *Save as Profile Picture*. You can limit who has access to view the attachment by selecting the appropriate user or group in the "Viewable by" menu. To access this menu, click on *Edit Attachment Properties* in the Actions menu.

Frequently Asked Questions

Can access to certain parts of the Relationship Profile be restricted to my users?

All users will have access to the Relationship Profile header, Detail, and Timeline sections. In the Manage Users tool, the System Administrator can limit access to any other section of the profile either by user or for an entire profile group. By default, all user have access to all portions of the Relationship Profile.

How do the social media icons (e.g. Facebook, Twitter, and LinkedIn) work?

Any user with access to the Relationship Profile can add or edit a link to the constituent's social media pages. Click on the LinkedIn, Twitter, or Facebook icon to open a dialogue box where you can paste and save the appropriate URL. Once the URL is saved then users can click on these links to go directly to the constituent's social media pages.

If your institution collects and stores the URLs to your constituent records' social media profiles then this feature can be enabled for you by supplying and additional file in your data feed. Please see the Data Request Guide for information on this file.

How do add or edit a picture of the constituent to the Relationship Profile?

Hover over the space provided for a picture in the upper left-hand corner of the Relationship Profile and click on that space to add a picture. This will bring up a dialogue box that will allow you to add an image by clicking on the Add Picture button. Then browse your computer to select the image file. Once it appears within the dialogue box you can click on the Submit button and the picture will appear in the Relationship Profile. This action will also add the image as an attachment and save it within the Attachments tab within Relationship Profile.

Click on the existing picture to remove or replace the existing picture that has been saved to the Relationship Profile. This will open a dialogue box that displays the current picture. You can then add another picture which will replace the existing picture and add the new picture to the Attachments tab. If you first decide to delete the picture it will remove it from Fundraiser Performance Management and will no longer be found in the Attachments tab.

You can also manage the picture of the constituent by using the functionality on the Attachments Tab. Simply upload your image then select the action called Save as Profile Picture.