

How to Use Profile Codes

Updated Jul 13, 2021

As of July 12, 2021, this "Learn Veracross" site has been deprecated. It will remain live at least through October 1, 2021, but will no longer be updated. All knowledge content has moved to the new [Veracross Community](#). Please update your bookmarks.

[Here is the new version of this article in the Veracross Community.](#)

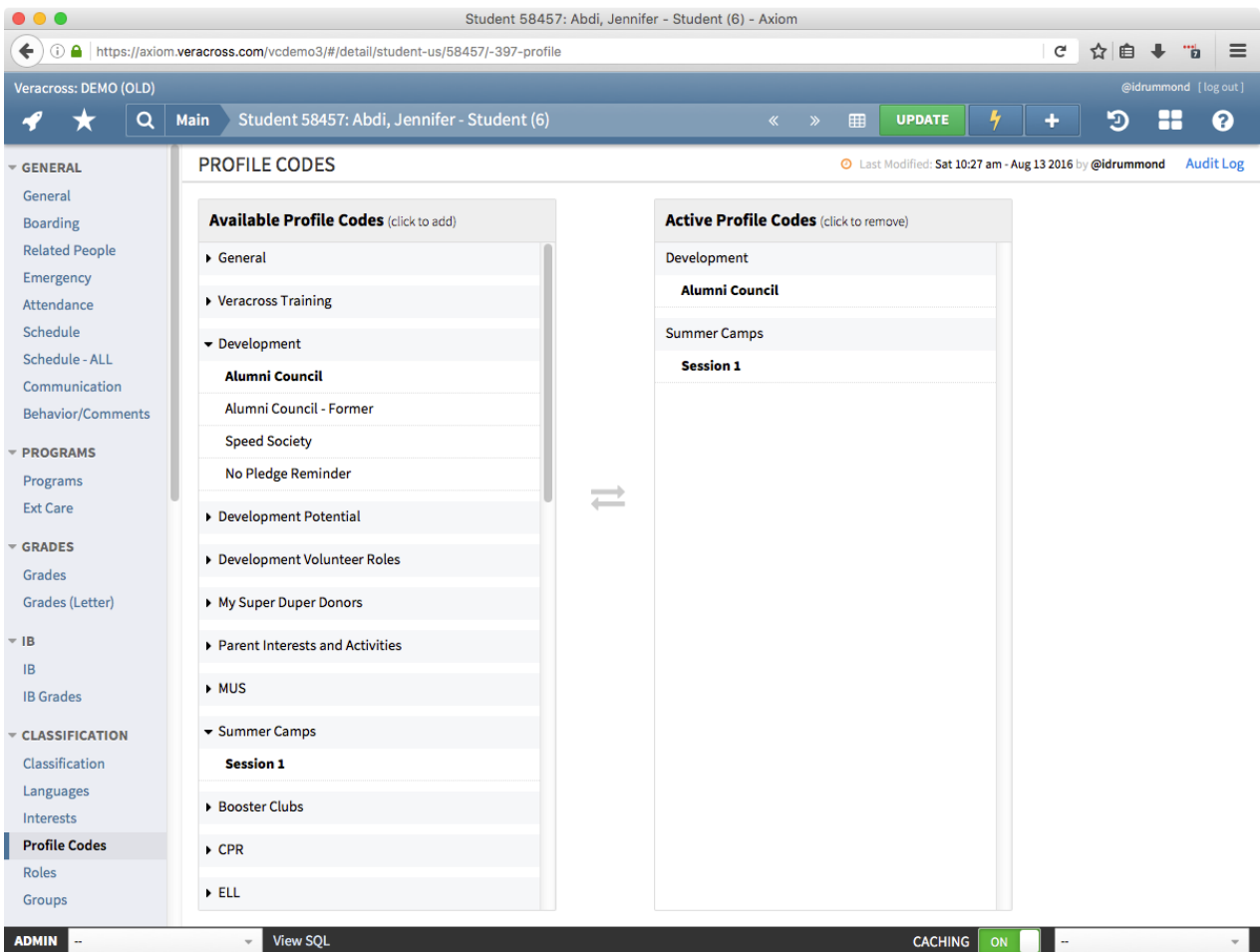
Overview

Profile codes are a quick and simple way to tag an individual person, or group of people with a yes/no attribute. They act as a flag to help mark records that have a certain characteristic. This tag enables users to run reports to find records that have (or perhaps have not) been marked with a specific profile code.

Profile codes are static, which means that they are not designed to track data historically; they can only tell you which records currently have an attribute, not which records had an attribute at a previous date.

Because profile codes are static, it also means these tags need to be manually added and updated on records. For example, if a student rides the bus home one year, but carpools the next, the profile code "Rides the Bus Home" would need to be manually removed from the student's record when that change occurs.

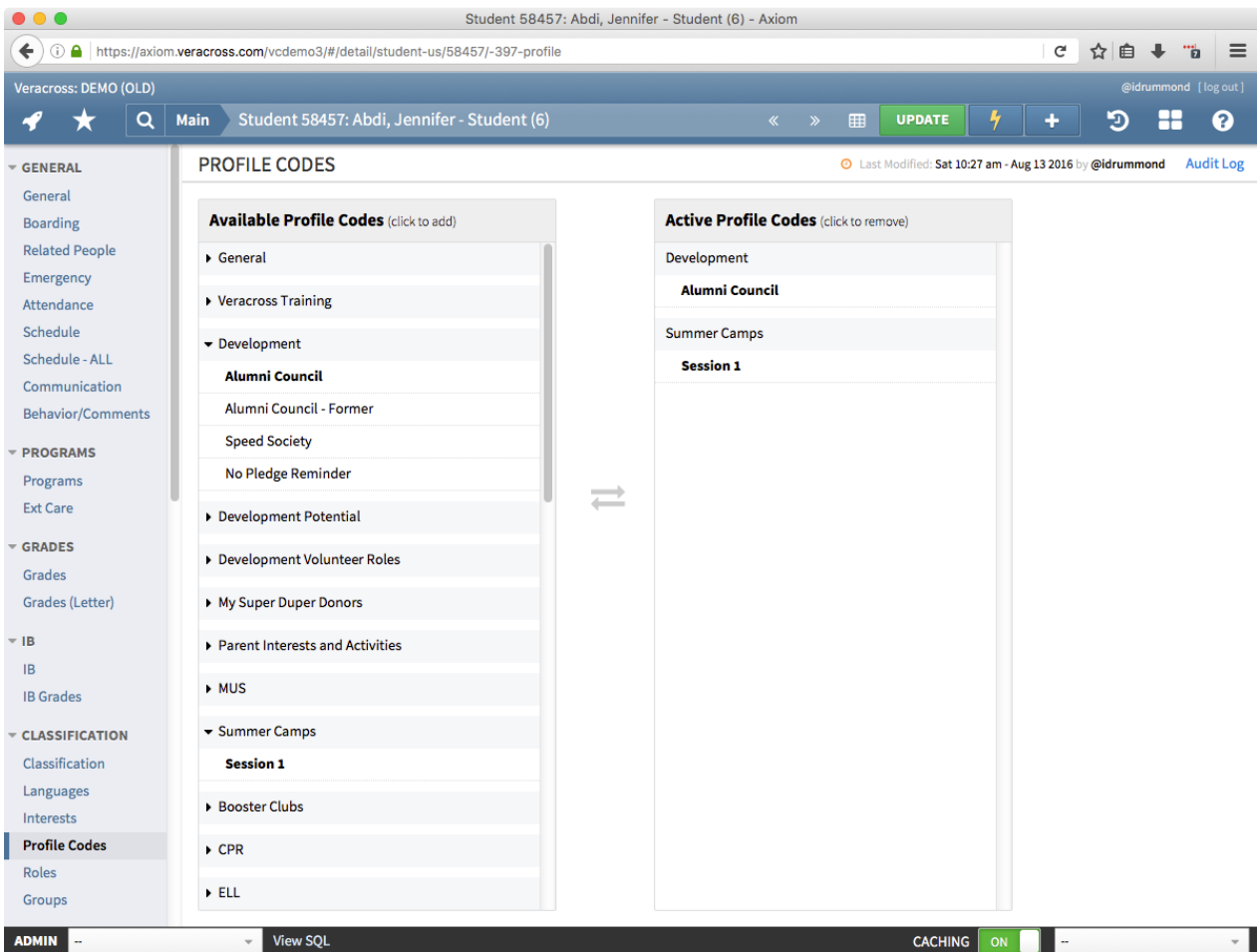
Adding Profile Codes to a Record



Tagging a record with a profile code is done from the Profile tab of the record. On the Profile tab, the available profile code categories are listed as folders and are viewable on the left side of the screen.

Expanding the profile code category folders reveals the individual profile codes that can be added to the record. Click the profile code on the left to add the selected profile code to the list of profile codes the record is currently tagged with.

How to create Profile Code Categories



Profile Code Categories are created by navigating to the System homepage and selecting “Profile Code Categories” from the “Add” menu. In this screen, you can designate which types of records this profile code category should apply to. Profile code categories can apply to people, people and organizations, only organizations, or donations & pledges.

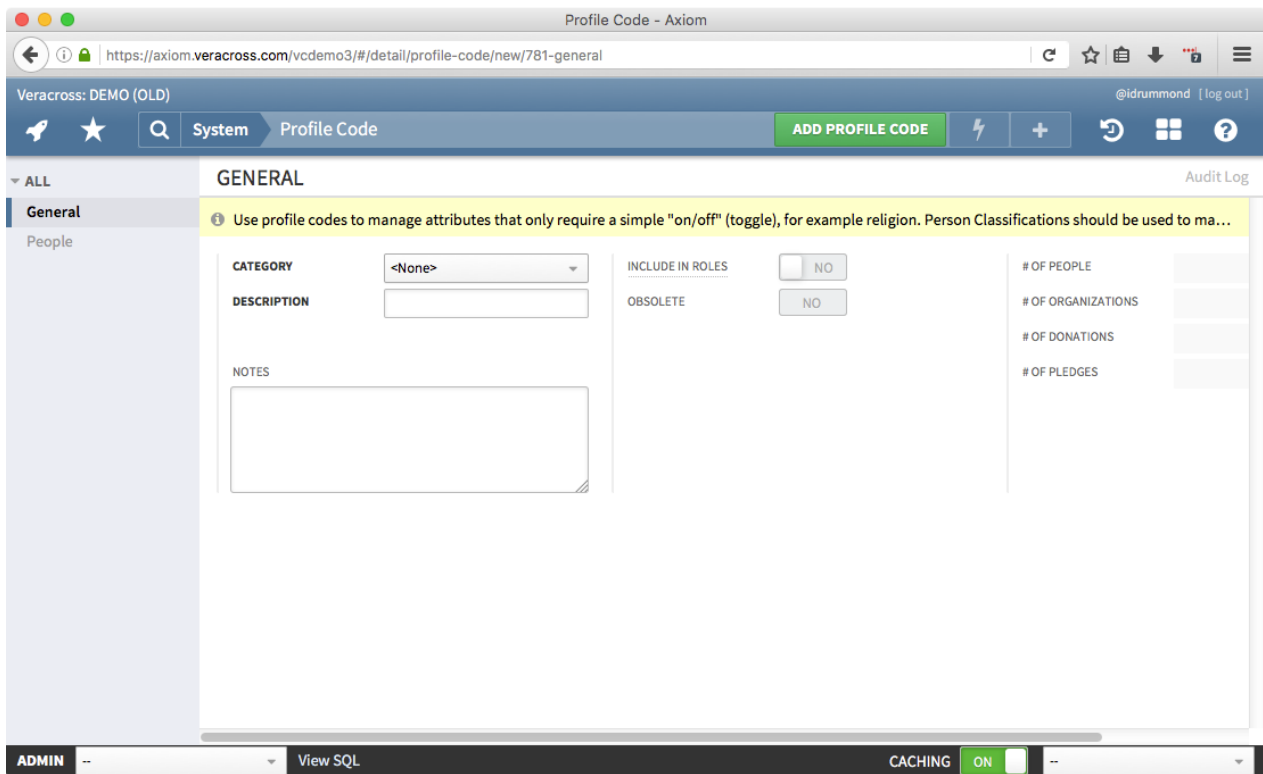
After this has been specified, label the category via the Description field. Permissions can also be set so that the Admissions or Development offices can have their own private profile code categories and profile codes (see “Limited View Profile Codes” section below).

Limited View Profile Codes

In addition to “general” profile codes that can be viewed by anyone, there are profile codes whose view is limited to certain users. Those profile codes are Admissions specific and Development specific profile codes. These limited profile codes are set by selecting the appropriate “Admissions Only” or “Development Only” checkbox on the profile code category.

Any profile codes that are added under a “Admissions Only” or “Development Only” category will only be accessible to users with the proper security role. Any “Admissions Only” profile code can only be viewed by users with the Admissions_1 or Admissions_2 security role. “Development Only” profile codes can only be viewed by users with the Development_1 or Development_2 security role.

How to Create Profile Codes



Profile codes can be created by navigating to the System homepage, hovering over the “Add” button, and selecting “Profile Codes.” On the new Profile Code detail screen, find and select the appropriate Category in the drop down menu. If there is not a corresponding profile code category, see the “How to create Profile Code Categories” section above.

After the profile code category has been chosen, label the new profile code in the Description field. If a profile code should be listed as a role in the “All Roles” field in a person query, check off the “Include in Roles” checkbox.