

Prospect Configuration Guide

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Prospect Config-2012

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Prospect Configuration

Before you can manage prospect information, we recommend you set up configuration options. From *Prospects*, you can access these options under **Configuration**.

You use configuration options to set up *Prospects* for your users. These options can affect multiple areas in the program. For example, you can define plan outlines and opportunity amount ranges you want available for your *Prospects* users.

Major Giving Setup

In **Major Giving Setup**, you define plan outlines and opportunity amount ranges for major giving prospects. To automatically credit solicitors for revenue received on a major giving opportunity, you can also default credit rules which assign specific percentages of credit to the manager and solicitors associated with the plan. You can also select whether to automatically calculate the realized amount for each type of planned gift vehicle.

Manage Plan Outlines

Plans detail how you intend to win a donation from a prospect. They include objectives, stages, dates, and steps you intend to take, such as meetings and phone calls. When you create a plan outline, your *Prospects* users can assign the outlines to plans they create on the prospect record. For example, if you have very specific steps you want taken for any planned gift prospect, you can create a “Planned Gift” plan outline. Then, when one of your fundraisers adds a planned gift plan to a prospect record, they can point to the outline. The steps defined in the outline then default into the prospect plan.

Add Plan Outline

Once you add a plan outline, your *Prospects* users can then access the outline from the Plans tab of a prospect and use the outline to complete the plan they assign the prospect.

Note: To help set up major giving plan outlines, the program provides a default basic major giving plan. This plan provides a basic outline of multiple steps to foster a relationship with major giving prospect through the stages of identification, cultivation, solicitation, and stewardship.

► Add a prospect plan outline to your Prospects system

1. From *Prospects*, click **Major giving setup** under **Configuration**. The Major Giving Setup page appears.
2. Select the Plan outlines tab.
3. Click **Add**. The Add plan outline screen appears.

Add plan outline

Name:

Site:

Adjust dates of selected rows:

Objective	Fundraiser role	Stage	Days from start	Contact method
Identification	Prospect manager	Lifecycle status 1	6	Email
Q&A	Primary manager	Lifecycle status 1	8	Phone Call
Determine interest	Secondary manager	Lifecycle status 1	8	Meeting
Commit to amount	Primary manager	Lifecycle status 2	10	Meeting
Receive gift	Prospect manager	Lifecycle status 3	15	Dinner
* <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

4. Complete the necessary fields. For a detailed explanation of the fields and options included on this screen, see *Add Plan Outline Screen* on page 2.
5. Click **Save** to save the outline and return to the Plan Outline tab. The new outline appears in the grid.

Add Plan Outline Screen

From the Add plan outline screen, you define default plan steps users can apply to their prospect plans.

Screen Item	Description
Name	Name your outline.
Site	You can limit access to the plan outline to users with security permissions for a specific site.
Adjust dates of selected rows	Select the row(s) in which you want to adjust Days from start data and click the Plus or Minus button accordingly. You can select more than one row at a time to adjust.
Objective	What you hope to accomplish during this planned step.
Fundraiser	The <i>Prospects</i> role responsible for executing the planned step.
Stage	Where in the cultivation scheme this step type falls (Identification, Cultivation, Negotiation).
Days from start	How many days from the start of the plan until this step is to be completed. When the outline is applied to a plan, the program calculates the date.
Contact method	The type of interaction you plan to have with the prospect: meeting, mailing, phone call.

Edit Plan Outline

After you create a plan outline, you can return to the outline at any time to make necessary changes. These changes do not, however, affect plans to which the outline is already assigned.

► Edit an existing plan outline

1. From *Prospects*, click **Major giving setup** under **Configuration**. The Major Giving Setup page appears.

2. From the Plan Outlines tab, select the outline you want to edit.
3. Click **Edit**. The Edit plan outline screen appears.
4. Make any necessary changes.

The fields and options included on the Edit plan outline screen are the same as those included on the Add plan outline screen. For a detailed explanation of these fields and options, see [Add Plan Outline Screen](#) on page 2.

5. Click **Save** to save your changes and return to the Plan Outlines tab.

Delete Plan Outline

You can delete any outlines that you no longer want available to your *Prospects* users. Once an outline is deleted, it cannot be assigned to any new plans. It remains, however, on any plans to which it was assigned before being deleted.

► Delete an existing plan outline

1. From *Prospects*, click **Major giving setup** under **Configuration**. The Major Giving Setup page appears.
2. From the Plan Outlines tab, select the outline you want to delete.
3. Click **Delete**. A confirmation screen appears.
4. Click **Yes** to remove the outline and return to the Plan Outlines tab.

Manage Opportunity Amount Ranges

The opportunity amount ranges are used in *Prospects* to classify your prospect's giving opportunity potential. From the Opportunity Amount Ranges tab in **Major Giving Setup**, you can add, edit, and delete amount range groups to meet your organization's specific needs. You can also restrict access to the groups based on sites.

Add Opportunity Amount Ranges

► Add opportunity amount ranges

1. From *Prospects*, click **Major giving setup** under **Configuration**. The Major Giving Setup page appears.
2. Select the Opportunity Amount Ranges tab.
3. Click **Add group**. The Add a group screen appears.

Add a group

Name:

Description:

Amount brackets:

Name	Lower limit
High	\$100,000.00
Low	\$50,000.00
	\$0.00

Sites:

Site
Headquarters

Save Cancel

4. In the **Name** field, enter a name identifying the opportunity amount range group.
5. In the **Description** field, you can enter additional information to help you identify the goal of this group.
6. In the **Amount brackets** grid, create the amount ranges you want to include in this group. Enter a **Name** and a **Lower limit** amount for each range.
7. In the **Sites** grid, you can assign the group to a specific site in your organization, limiting who has access to the ranges. You create sites with the **Sites** tool accessed under **Configuration** in *Administration*.
8. Click **Save** to save the group and return to the Opportunity Amount Ranges tab.

Edit Amount Ranges

► Edit an amount range

1. From *Prospects*, click **Major giving setup** under **Configuration**. The Major Giving Setup page appears.
2. Select the Opportunity Amount Ranges tab.
3. In the **Opportunity amount ranges** grid, select the range you want to edit.
4. Click **Edit group**. The Edit a group screen appears.
5. Make any necessary changes.
6. Click **Save**.

Delete Amount Range

► Delete an amount range

1. From *Prospects*, click **Major giving setup** under **Configuration**. The Major Giving Setup page appears.
2. Select the Opportunity Amount Ranges tab.
3. In the **Opportunity amount ranges** grid, select the range you want to delete.

4. Click **Delete group**. A confirmation screen appears.
5. Click **Yes** to delete the range and return to the Opportunity Amount Ranges tab.

Change Base Currency of Amount Group

► Change the base currency of an amount group

1. From *Prospects*, click **Major giving setup** under **Configuration**. The Major Giving Setup page appears.
2. Select the Opportunity Amount Ranges tab.
3. In the **Opportunity amount ranges** grid, select the range and click Change base currency.
4. Select the base currency to use for the group.
5. Click **Save** and return to the Opportunity Amount Ranges tab.

Manage Solicitor Revenue Credit

When you create a major giving plan, you assign solicitors and add an opportunity to the plan. After the prospect contributes a gift, you can credit the plan's solicitors for the revenue you receive. To simplify this process, you can define default credit rules for plan solicitors. When you apply revenue to the opportunity, solicitors linked to the associated major giving plan automatically receive credit based on the credit rules you create.

► Edit solicitor revenue credit rules

1. From *Prospects*, click **Major giving setup** under **Configuration**. The Major Giving Setup page appears.
2. Select the Solicitor Credit Rules tab.
3. Click **Edit**. The Define solicitor revenue credit rules screen appears.

Define solicitor revenue credit rules

When revenue is linked to a major giving opportunity, automatically assign solicitor credit as follows:

Primary manager credit percent:

Secondary manager credit percent:

Secondary solicitor credit percent:

Revenue types

Pledge

Donation

Planned gift

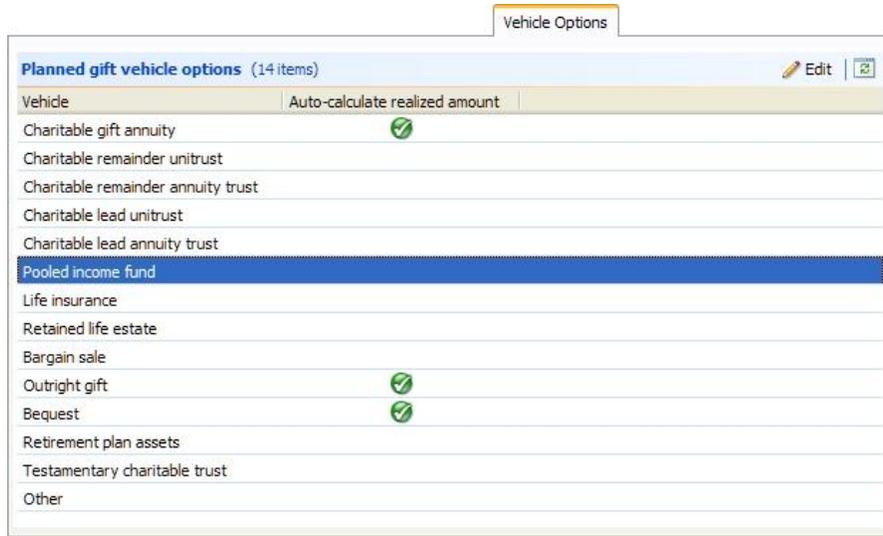
Grant award

4. Enter the credit amount, up to 100 percent, to automatically assign to the primary manager, secondary manager, and secondary solicitors assigned to a major gift plan or grant funding request.

5. In **Revenue types**, select each type of revenue to include for the credit default.
6. Click **Save**. You return to the Solicitor Credit Rules tab.

Manage Vehicle Options

When you add a planned gift, you select its applicable vehicle such as charitable gift annuity or bequest. On the Vehicle Options tab, for each vehicle type, you can select whether to automatically calculate the realized amount as your organization receives revenue toward a planned gift.



Vehicle	Auto-calculate realized amount
Charitable gift annuity	<input checked="" type="checkbox"/>
Charitable remainder unitrust	<input type="checkbox"/>
Charitable remainder annuity trust	<input type="checkbox"/>
Charitable lead unitrust	<input type="checkbox"/>
Charitable lead annuity trust	<input type="checkbox"/>
Pooled income fund	<input type="checkbox"/>
Life insurance	<input type="checkbox"/>
Retained life estate	<input type="checkbox"/>
Bargain sale	<input type="checkbox"/>
Outright gift	<input checked="" type="checkbox"/>
Bequest	<input checked="" type="checkbox"/>
Retirement plan assets	<input type="checkbox"/>
Testamentary charitable trust	<input type="checkbox"/>
Other	<input type="checkbox"/>

Note: If you select to automatically calculate the realized amount for a planned gift vehicle, users can disable the automatically calculated amount for a planned gift if necessary.

► Edit the options for a planned gift vehicle

1. From *Prospects*, click **Major giving setup** under **Configuration**. The Major Giving Setup page appears.
2. On the Vehicle Options tab, select the vehicle to edit and click **Edit**. The Edit planned gift vehicle options screen appears.



Edit planned gift vehicle options

Auto-calculate realized amount

Save Cancel

3. Select whether to automatically calculate the realized amount for planned gifts of the vehicle type.
4. Click **Save**. You return to the Vehicle Options tab.

Manage Vehicle Subtypes

When you add a planned gift and select its applicable vehicle such as charitable gift annuity or bequest, you can also specify a subtype to further describe the vehicle. On the Vehicle Subtypes tab, you can create subtypes and determine which vehicle types should use them.

Note: Charitable gift annuities have pre-defined subtypes that cannot be edited. You also cannot add additional subtypes for charitable gift annuities from the Vehicle Subtypes tab.

Add Subtypes for Planned Gift Vehicle

► Add subtypes for a planned gift vehicle

1. From *Prospects*, click **Major giving setup** under **Configuration**. The Major Giving Setup page appears.
2. On the Vehicle Subtypes tab, click **Add**. The Add a subtype screen appears.
3. Enter a subtype name and then select which planned gift vehicles this subtype applies to.
4. Click **Save**. You return to the Vehicle Options tab.

Edit Subtypes for Planned Gift Vehicle

► Edit subtypes for a planned gift vehicle

1. From *Prospects*, click **Major giving setup** under **Configuration**. The Major Giving Setup page appears.
2. On the Vehicle Subtypes tab, select the vehicle subtype and click **Edit**. The Edit a subtype screen appears.
3. Change the name or select different planned gift vehicles which can use the subtype.
4. Click **Save**. You return to the Vehicle Options tab.

Delete Subtypes for Planned Gift Vehicle

► Delete subtypes for a planned gift vehicle

Once a subtype has been specified on a planned gift, you cannot delete it. Instead, you can mark it inactive

1. From *Prospects*, click **Major giving setup** under **Configuration**. The Major Giving Setup page appears.
2. On the Vehicle Subtypes tab, select the vehicle subtype and click **Delete**. A confirmation message appears.
3. Click **Yes** to delete the subtype. You return to the Vehicle Options tab.

Mark Subtype for Planned Gift Vehicle Active/Inactive

► Mark subtypes for a planned gift vehicle active or inactive

1. From *Prospects*, click **Major giving setup** under **Configuration**. The Major Giving Setup page appears.
2. On the Vehicle Subtypes tab, select the subtype and click **Mark inactive** or **Mark active**. A confirmation message appears.
3. Click **Yes** and the vehicle subtype is now inactive or active. You return to the Vehicle Options tab. Inactive subtypes are not available to use on planned gifts.

Manage Planned Gift Receipts

When planned gifts are irrevocable and your organization is the trustee on a gift, it may be appropriate to receipt for planned gifts. Ultimately, your decision to receipt for planned gifts should be based on your own processes and tax laws. From Major Giving Setup, you can select, by vehicle type, which planned gifts to receipt. You can also select to not receipt planned gifts.

► Edit planned gift receipt settings

1. From *Prospects*, click **Major giving setup** under **Configuration**. The Major Giving Setup page appears.
2. Select the Planned Gift Receipts tab.
3. Click **Edit**. The Planned gift receipt settings screen appears.

Planned gift receipt settings

Do not receipt

Receipt only for the vehicle types below:

Vehicle
*

Save Cancel

4. To produce no receipts for planned gifts, select **Do not receipt**.
5. To receipt for planned gifts, select **Receipt only for the vehicle types below**.
From the grid, select the vehicle types for which to receipt.

Planned gift receipt settings

Do not receipt

Receipt only for the vehicle types below:

Vehicle
* Charitable gift annuity
Charitable remainder unitrust
Charitable remainder annuity trust
Charitable lead unitrust
Charitable lead annuity trust

Save Cancel

6. Click **Save** to save the planned gift receipt settings and return to the Planned Gift Receipt Settings tab. The new settings appear on the tab.

Grants and Major Giving

To view grant activity in key performance indicators (KPIs) and reports, you must consolidate grants with major giving management. From *Prospects*, click **Major giving setup** under **Configuration**. From the Major Giving

Setup page, click **Include grants in major giving management** under **Configuration**. When you apply this setting, grant activity appears in *Prospects*.

- On a fundraiser’s My prospect research page, the steps assigned to the fundraiser on a funding request appear. From the Grants tab, individuals can view information about their fundraising activity related to grants.
- On the Major Giving Management – Prospects page, current grant activity appears under **Grants in Pipeline** on the Pipeline tab.
- On the Major Giving Management – Opportunities and Asks page, grant funding request information appears under **Funding request summary** on the Summary tab.

If you previously included grant activity but no longer want to have a consolidated view, click **Exclude grants from major giving management**.

Manage Opportunity Likelihoods

To track projected revenue for major giving plan opportunities, you can indicate the likelihood your organization will receive each ask amount. From the Define Likelihood Percents page, you can create the likelihood definitions. For example, you may have a likelihood of “Excellent” you define as “100%” to indicate you expect the prospect to give the total amount asked. You can use this information when you create analytical reports to determine the revenue you expect to receive based on the current status and likelihood assigned to opportunities.

Define Likelihoods

You can select a likelihood entered on the Define Likelihood Percents page in *Prospects* when you add an opportunity to a major giving plan. The likelihood indicates the probability that the prospect will give the amount asked.

► Define a likelihood

You can add or edit likelihood definitions from the Define Likelihood Percents page. You can also delete likelihoods that have been assigned to an opportunity.

1. From the Prospects page, select **Define likelihood percents** under **Configuration**. The Define Likelihood Percents page appears.
2. Click **Edit likelihood percents**. The Edit likelihood percents screen appears.
3. Enter a name and percent for the likelihood.

Note: Changes you make to the name or percent automatically appear on opportunities assigned this likelihood. For example, if you change a likelihood of “Excellent” from “100%” to “95%,” the percent changes on all opportunities identified as “Excellent.” Reports and dashboards use the new percent to calculate projected revenue.

4. Click **Save**. You return to the Define Likelihood Percents page.

Define a Likelihood Percent Screen

The table below explains the items on the Define a likelihood percent screen. For information about how to access this screen, see Define Likelihoods on page 9.

Screen Item	Description
Likelihood	Enter a name to describe the degree of likelihood.

Screen Item	Description
Percent	Enter a number to define the likelihood. When you assign a likelihood to an opportunity, the percent indicates the probability a prospect will give the gift amount requested. Reports and dashboards use this information to calculate projected revenue for opportunities.

Delete a Likelihood

You can delete likelihoods that have not been assigned to an opportunity. From the Define Likelihood Percents screen, select an entry and press **DELETE**. A verification message appears. Click **OK** to delete the likelihood.

Wealth And Ratings Data

From the Wealth And Ratings Data page, you can define a **WealthPoint** search process that includes a selection of records. For example, you have ten prospects you want updated with the latest **WealthPoint** data. In **Manage Research Groups** you create a group that includes these ten prospects. From **Wealth And Ratings Data** you can then create a search process using this group that instructs the program to extract information about the prospects included in the group from your **WealthPoint** system and update your prospects' **WealthPoint** information.

Once you create a search process, you can also create a job schedule, instructing the process to run at a fixed interval. The Wealth And Ratings Data page houses a list of all executed searches. It displays date, status, user, and prospect information.

The WealthPoint Refresh Notification tab tracks wealth screening refreshes.

Access Wealth And Ratings Data Page

You access the Wealth And Ratings Data page by clicking the **Wealth and ratings data** link housed under **Configuration** on the Prospects page.

View Refreshed WealthPoint Data

If you choose to allow automatic **WealthPoint** Data Refreshes - by clicking the **Enable Data Refresh** option displayed on the explorer bar of the Wealth And Ratings Data page - any data refreshes added to the system are displayed on the Wealth And Ratings Data page.

Note: For information about enabling data refreshes, see **Enable Data Refresh** on page 11.

For example, if the D&B data is refreshed, all constituents whose records were updated with the new D&B data display on the page, along with the date of the update, the source updated, wealth detail information, fields updated, and the old and new values.

The following data sources are included in the Data Refresh process:

- D&B
- GuideStar - Nonprofit Associations
- GuideStar - Foundation Affiliations
- Thomson
- Who's Who

You can filter the notifications included on the page based on the **Name**, **Date submitted**, or **User name**. Simply enter the information in the appropriate field included at the top of the grid and click **Apply**. To return to the default setting of all notifications, click **Reset**.

View Refreshed Constituent Record

From the Wealth And Ratings Data page on the WealthPoint Data Refresh tab, you can access the constituent record of any constituent included in a Data Refresh process.

To access the record, select the record in the **WealthPoint Data Refresh history** grid and click **Go to constituent**. The constituent record displays. Click **Back** to return to the Wealth And Ratings Data page.

View List of WealthPoint Searches

The WealthPoint Search History tab on the Wealth And Ratings Data page houses a list of all searches. The top section of the tab - the **WealthPoint unresolved searchers** grid - displays any incomplete or failed searches.

The **WealthPoint resolved searches** grid displays all searches, single and groups, that have completed or failed. From this grid, you can filter and reorder items listed and open selected constituents.

To access the Wealth And Ratings Data page, from the Prospects page, under **Configuration** click **Wealth And Ratings Data** in the explorer bar. The Wealth And Ratings Data page appears.

Retrieve WealthPoint Search Results

From the WealthPoint Search History tab on the Wealth And Ratings Data page, you can track the search process, watching for the “Results ready” status to appear in the **WealthPoint unresolved searches** grid, confirming that your results are ready. You can then access the search results by selecting the item in the grid and clicking **Retrieve results**. After you retrieve the results, the search item is moved to the bottom half of the page into the **WealthPoint resolved searches** grid. For more information about the Wealth And Ratings Data page, see View List of WealthPoint Searches on page 11.

Track Subscription Status

Under **Tasks** on the Wealth And Ratings Data page, click **Subscription status** to access a screen displaying information about your current subscription. You must be logged into **WealthPoint** before you can access the subscription information.

The screen displays the **Subscription type**, number of **Group searches remaining**, and your **Subscription renewal date**.

Edit the WealthPoint URL

If you need to change the network location where you connect to **WealthPoint**, you can do so from the Wealth and Ratings Data page. Under **Tasks**, click **Edit WealthPoint URL**. On the Edit WealthPoint URL screen, enter the location of the wwssoap file used to connect to **WealthPoint** and click **Save**. You return to the Wealth and Ratings Data page.

Register with WealthPoint

The first time you use a database with **WealthPoint**, you must register the database. This is a one-time procedure. Once the database is registered the registration link disappears. To register, click the **Register with WealthPoint** link under **Tasks** on the Wealth And Ratings Data page.

Enable Data Refresh

If you click **Enable Data Refresh** under **Tasks** on the Wealth And Ratings Data page, every time **WealthPoint** updates D&B, Guidestar NP or PF, Thomson, or Who’s Who data your existing records are automatically

updated. To help you keep track of refreshed records, the constituent name and other relevant information displays on the Wealth And Ratings Data page. For more information, see [View Refreshed WealthPoint Data](#) on page 10.

Disable Data Refresh

If you click **Disable Data Refresh** under **Tasks** on the Wealth And Ratings Data page, the **Enable Data Refresh** task is turned off and no longer are your records automatically updated every time WealthPoint updates D&B, Guidestar NP or PF, Thomson, or Who's Who data.

Manage WealthPoint Searches

The WealthPoint searches tab in **Wealth And Ratings Data** houses all your **WealthPoint** search processing tools. From here, you can create a search process, edit or delete existing search processes, generate a *Windows* scripting file, schedule processing jobs, run a job process, and view job processing records.

Create WealthPoint Search Process

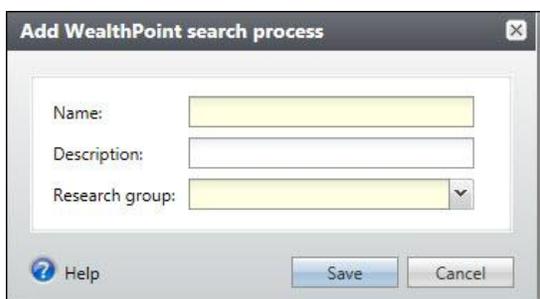
A search process defines what and how information is extracted from **WealthPoint**. Before you create a process, you must create a research group and include all prospects for which you want **WealthPoint** information updated. Using the group of prospects saves you a great deal of time over updating prospects one at a time. The group can include as many prospects as necessary. If you are updating a large number of prospects, you may want to schedule the job for a time when no one is working in your system.

► Create a WealthPoint search process

1. From the Wealth And Ratings Data page, select the WealthPoint searches tab.

Note: For information about accessing the Wealth and Ratings Data page, see [Access Wealth And Ratings Data Page](#) on page 10.

2. Click **Add**. The Add WealthPoint search process screen appears.



3. Enter the necessary information. For an explanation of the fields and options included on this screen, see [Add WealthPoint Search Process Screen](#) on page 13.
4. Click **Save**. The process is saved and stored on the WealthPoint searches tab.
5. To update the records, from the WealthPoint searches tab, select the import process you want to run and click **Start Process**. The WealthPoint search process screen appears. From this screen, you can view the updating process and confirm when the process is complete and if it was successful. This screen also stores details about your WealthPoint search processes.

Add WealthPoint Search Process Screen

From this screen, you select the prospect records for which you want to update **WealthPoint** data, and define the search process.

Screen Item	Description
Name	Name the search process you are creating. The name displays in the WealthPoint search process grid on the WealthPoint searches tab.
Description	Describe the search process you are creating. This helps users identify the process from the WealthPoint search process grid on the WealthPoint searches tab.
Research group	Select the research group you want to include in the update process.

Edit WealthPoint Search Process

A search process defines what and how information is extracted from **WealthPoint**. From the WealthPoint searches tab in **Wealth And Ratings Data**, you can edit existing search processes. If you want to change the prospect group used in the process, you may want to first edit the group in **Manage Research Groups**.

You can also edit a process from the WealthPoint search process screen by clicking the **Edit process** option included in **Tasks** on the Explorer bar. The process screen appears after you run a process or when you select a process on the WealthPoint Searches tab of the Wealth And Ratings Data page then click **Go to WealthPoint search process**.

► Edit an existing WealthPoint search process

1. From the Wealth And Ratings Data page, select the WealthPoint searches tab.

Note: For information about accessing the Wealth and Ratings Data page, see Access Wealth And Ratings Data Page on page 10.

2. Click **Edit**. Edit WealthPoint search process screen appears.
3. Enter the necessary information.

The fields and options included on the Edit WealthPoint search process screen are the same as those included on the Add WealthPoint search process screen.

4. Click **Save**. The process is saved and stored on the WealthPoint searches tab.
5. To update the records, from the WealthPoint searches tab, select the import process you want to run and click **Start Process**. The WealthPoint search process screen appears. From this screen, you can view the updating process and confirm when the process is complete and if it was successful. This screen also stores details about your WealthPoint search processes.

Delete WealthPoint Search Process

A search process defines what and how information is extracted from **WealthPoint**. From the WealthPoint searches tab in **Wealth And Ratings Data**, you can delete existing search processes, removing them permanently from your system.

You can also delete a process from the WealthPoint search process screen by clicking the **Delete process** option included in **Tasks** on the Explorer bar. The process screen appears after you run a process or when you select a process on the WealthPoint Searches tab of the Wealth And Ratings Data page then click **Go to WealthPoint search process**.

► Delete an existing WealthPoint search process

1. From the Wealth And Ratings Data page, select the WealthPoint searches tab.

Note: For information about accessing the Wealth and Ratings Data page, see Access Wealth And Ratings Data Page on page 10.

2. In the **WealthPoint search processes** grid, select the process you want to delete.
3. Click **Delete**. A confirmation screen appears.
4. Click **Yes**. The process is deleted and removed from the WealthPoint searches tab.

Tabs of a Process Status Page

Each business process in the database has a status page. The process status page contains information specific to the process. You enter this information when you add the process to the database. Each process status page also includes information about the most recent instance of the process and historical data about the process. On some process status pages, you can manage the job schedules of the process. To help manage this information, each process status page contains multiple tabs.

Recent Status Tab

On the Recent status tab, you view the details of the most recent instance of the process. These details include the status of the process; the start time, end time, and duration of the process; the person who last started the process; the name of the server most recently used to run the process; the total number of records processed; and how many of those records processed successfully and how many were exceptions.

History Tab

Each time you run a business process, the program generates a status record of the instance. On the History tab, you view historical status record information about each instance of the process. The information in the grid includes the status and date of the instance.

On the History tab, you can limit the status records that appear in the grid. You can filter by the process status. If you filter the records that appear in the grid, it can reduce the amount of time it takes to find a process instance. For example, if you search for an instance that did not finish its operation, you can select to view only status records with a **Status** of Did not finish. To filter the records that appear in the grid, click the funnel in the action bar. The **Status** field and **Apply** button appear so you can select the status of the instances to appear in the grid. To update the information that appears, click **Refresh List** on the action bar.

Depending on your security rights and system role, you can delete a status record from the grid on the History tab.

Delete a Status Record from the History Tab of a Process Status Page

On the History tab of a process status page, you can delete a specific status record of the process. When you delete a status record, you delete the specific instance and all of its history.

► Delete a status record from the History tab

1. On the History tab of the process status page, select a status record and click **Delete**. A confirmation message appears.

Note: You can filter the records in the grid by the status of the process to reduce the amount of time it takes to find an instance of the process. For example, to search for a completed instance, click the

funnel icon, select "Completed" in the **Status** field, and click **Apply**. Only completed instances appear in the grid.

2. Click **Yes**. You return to the History tab. The selected status record no longer appears.

Job Schedules Tab (Not Available on All Process Pages)

On the Job schedules tab, you can view the job schedules of the process in the database. The details in this grid include the name, whether a job schedule is enabled, the frequency of the job schedule, the start date and time and end date and time, and the date the job schedule was added and last changed in the database. You enter this information when you set the job schedule of the process.

Depending on your security rights and system role, you can add, edit, and delete job schedules that appear on the Job schedules tab. To update the information that appears, click **Refresh List**.

Schedule Process Jobs

You can create a job schedule to automatically run a business process. When you create a schedule for a process, the program exports and runs the process at the scheduled instance or interval. For example, you can schedule a process to run at a time convenient for your organization, such as overnight. To create a job schedule, click **Add** on the Job schedules tab of the process status page. The Create job screen appears.

Note: To create a job schedule from any tab of the process status page, click **Create job schedule** under **Tasks**.

► Create a job schedule

1. On the Job schedules tab of the process, click **Add**, or click **Create job schedule** under **Tasks**. The Create job screen appears.

Create job

Job name:

Schedule type: Enabled

One-time occurrence

Date: Time:

Frequency

Occurs every: day(s)

Daily frequency

Occurs once at:

Occurs every: Minutes Starting at: Ending at:

Duration

Start date: End date: No end date

2. In the **Job name** field, enter a name for the scheduled process.
3. By default, the schedule is active. To suspend it, clear the **Enabled** checkbox.

4. In the **Schedule type** field, select how often to run the process. Your selection determines which other fields are enabled.
5. In the remaining fields, select when to run the job schedule and how long to keep it active.
6. Click **Save**. You return to the Job schedules tab.

Edit Job Schedules

After you create a job schedule for a process, you can update it as necessary. For example, you can adjust its frequency. You cannot edit the package selected to create the job schedule.

► Edit a job schedule

1. On the Job schedules tab, select a job and click **Edit**. The Edit job screen appears. The options on this screen are the same as the Create job screen. For information about these options, see Create Job Screen on page 16.
2. Make changes as necessary. For example, in the **Schedule type** you can change how often to run the process.
3. Click **Save**. You return to the Job schedules tab.

Create Job Screen

Screen Item	Description
Job name	Enter a name for the job schedule.
Schedule type	Select how often to run the job schedule. You can run a process once; on a daily, weekly, or monthly basis; whenever <i>SQL Server Agent</i> service starts; or whenever the computer is idle according to <i>SQL Server Agent</i> .
Enabled	By default, the scheduled process is active. To suspend the process, clear this checkbox.
One-time occurrence	For a process that runs just once, select the date and time to run it.
Frequency	For a process that runs on a daily, weekly, or monthly basis, select the number of days, weeks, or months between instances in the Occurs every field. For a weekly process, select the day of the week to run it. For a monthly process, select the day of the month to run it.
Daily frequency	For a process that runs on a daily, weekly, or monthly basis, select whether to run it a single time or at regular intervals on the days when it runs. To run a process once, select Occurs once at and enter the start time. To run a process at intervals, select Occurs every and enter the time between instances, as well as a start time and end time.
Start date	For a process that runs on a daily, weekly, or monthly basis, select a start date and, if necessary, an end date. To run the process indefinitely, select No end date .

Delete Job Schedules

On the Job schedules tab of the status page, you can delete a job schedule of the process. This deletes the scheduled job as well as any changes made to it outside the program.

► Delete a job schedule

1. On the Job schedules tab, select the job and click **Delete**. A confirmation screen appears.
2. Click **Yes**. You return to the Job schedules tab.

Start Process

This task allows you to start the selected business process from the process page.

Exception Report

When you run a process, the process status page appears and displays the number of records that did and did not process. Records that fail to process are called exceptions. When there are exceptions, you can view the Exception Report for the generated process. This report lists the expectations generated and explains why each did not process properly. You can view the most recent Exception Report from the Recent status tab of the process page. If you want to view an older report, you can do so from the History tab of the process page.

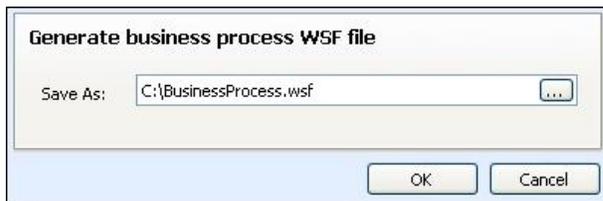
To print a report, click the **Print** button on the toolbar of the report. You can also set up the page format for the print job to determine how the printed report looks. You can also use the report information in another software application or save the report in another file format, such as to share the data with someone who cannot access the program. When you click the **Export** button on the toolbar, you can export the information into a shared application, such as Microsoft *Excel*, or save the report into an easily shared format, such as Adobe *Acrobat* (*.pdf) or a Web archive (*.mhtml).

Generate Windows Scripting File

A Windows Scripting File (*.wsf) is an executable script file format for Windows that can incorporate VBScript (*.vbs) routines and include XML elements.

► Generate a Windows Scripting File

1. On the process that requires a Windows Scripting File, click **Generate WSF** under **Tasks**. The Generate business process WSF file screen appears.



2. In the **Save As** field, enter the path and file name for the WSF file. To browse for a location to save the file, click the ellipsis. The Save As screen appears.
3. Click **OK**. The program saves the WSF file.

Wealth Capacity Formula Management

A wealth capacity formula is used to determine a constituent's estimated wealth range, major giving capacity range, and major giving capacity value. The system provides a default formula for calculating these ranges, but you may also choose to create additional formulas.

From the Wealth Capacity Formula Management page, you can add a new wealth capacity formula, edit an existing formula and choose which formula to use as the system default. You can also assign a formula to a record, group of records, or a research group.

Access Wealth Capacity Formula Management

You access the Manage Wealth Capacity Formula Management page by clicking the **Wealth capacity formula management** link housed under **Configuration** on the Prospects page.

Note: To access the Prospects page, click **Prospects** on the application action bar.

Create a Wealth Capacity Formula

In addition to the default formula provided with the system, you can create new formulas for calculating a prospect's estimated wealth, major giving capacity, and major giving capacity value. You create a new wealth capacity formula from the Wealth Capacity Formula Management page.

► Create a wealth capacity formula

1. From the Wealth Capacity Formula Management page, select **Add**. The Add wealth capacity formula screen appears.

2. Enter a name and description for the new formula.
3. To set this formula as the default, mark the checkbox. The default formula is applied to new constituent records.
4. If you want to allow other users to edit this formula, mark the **Other users may modify this formula** checkbox.
5. To apply the formula to an individual constituent, mark **Individual constituent**. Click the search icon to locate the constituent.
6. To apply the formula to a research group, mark **Research group**. Click the search icon to locate the research group. You can apply a formula only to the groups to which you have access.

7. To apply the formula to a group of records, mark **Selection**. Using the icons in the field, you can search for a selection, edit an existing selection, or create a new selection.
8. Select the Assets tab.

Add wealth capacity formula

Name/Description **Assets** Calculations

Real estate
 Business ownership
 Securities
 Income/compensation
 Other assets
 Nonprofit affiliations
 Private foundations

Real estate calculation settings

Data source(s) to include: Fidelity Data Services

Use confirmed records only

Multiply value by: 1.0000
 If less than: \$0.00

Multiply value by: 0.0000
 Otherwise multiply by: 0.0000

Value to use in calculation: Use largest of

Property valuation
 Property value estimate

Help Save Cancel

9. In the **Select asset types to include** frame, select the assets you want to include in the formula. The calculation settings on the right side of the screen change depending on the asset you highlight.
10. Enter the necessary information. For an explanation of the fields and options included on this screen, see [Add Wealth Capacity Formula Screen](#) on page 20.

Note: Values of “0” are not included in calculations when you select “Use smallest of” or “Use average of” as your asset calculation method.

11. Select the Calculations tab.

Add wealth capacity formula

Name/Description Assets **Calculations**

Calculation options

Asset calculation method: Total asset value

Major giving multiplier:

- Set value 0.0500
- Age dependent
 - Over 70 years: 0.0500
 - Between 60-69 years: 0.0400
 - Between 50-59 years: 0.0300
 - Between 40-49 years: 0.0200
 - Less than 40 years: 0.0100
 - Age unknown: 0.0100

Help Save Cancel

12. Enter the necessary information. For an explanation of the fields and options included on this screen, see Add Wealth Capacity Formula Screen on page 20.

Note: Values of “0” are not included in calculations when you select “Smallest asset value” or “Average asset value” as your asset calculation method.

13. Click **Save**. The formula is saved and stored on the Wealth Capacity Formula Management page.

Add Wealth Capacity Formula Screen

The Add wealth capacity formula screen consists of the Name/Description, Assets, and Calculations tabs. Using these tabs you create a new wealth capacity formula.

Name/Description Tab

Screen Item	Description
Name	Enter a name for the new formula. The name you enter displays on the Wealth Capacity Formula Management page.
Description	Enter a description for the new formula. The description you enter displays on the Wealth Capacity Formula Management page.
Set this as the default formula	Mark this checkbox to set this formula as the default. The default formula is applied to new constituent records.
Other users may modify this formula	Mark this checkbox if you want to allow other users to edit this formula.
Apply formula to	Mark this checkbox if you want to apply the formula to a record, group of records, or research group. For more information about applying formulas, see Apply a Wealth Capacity Formula on page 21.

Assets Tab

Screen Item	Description
Select asset types to include	Select the assets you want to include in the formula. The calculation settings on the right side of the screen change depending on the asset you highlight.
Data source(s) to include	Select the data source(s) you want to include in the formula.
Use confirmed records only	Mark this checkbox to use only confirmed records. When marked, the system verifies each asset record type is confirmed before including them in the formula.
Multiplier value	For each asset type, you select a multiplier value to apply to the asset.
Values to use in calculation	The values you can include in the calculation change depending upon the asset type you select. For example, if you select Securities, you can select Direct holdings value, Indirect holdings value, or Total value; if you select Affluence indicators, your only option is Retirement plan assets.

Calculations Tab

Screen Item	Description
Asset calculation method	Select a calculation method. Your choices include “Total Asset Value”, “Average Asset Value”, “Largest Asset Value”, and “Smallest Asset Value.” The wealth capacity estimation is determined from your selection.
Major giving multiplier	This percentage is applied to a constituent’s estimated wealth value to determine major giving capacity. You can enter a fixed percentage to use for all prospects, or base the percentage on age. You edit the percentages in each of the fields.

Manage Wealth Capacity Formulas

The Wealth Capacity Formula Management page lists the formulas currently defined in the system. From this page, you can add a new formula, edit and delete existing formulas, and select which formula to use as the default. You can also assign formulas to prospects, research groups and selections.

Apply a Wealth Capacity Formula

You have several options when you choose to apply a formula to a record or group of records. For example, you can apply a formula to a single constituent or a group of constituents. When applying a formula to a group of records, you can edit or create a new selection from ad-hoc query to select the records. You can also apply a formula to any research group to which you have access.

► Apply a wealth capacity formula

1. From the Wealth Capacity Formula Management page, select the formula you want to apply and click **Apply formula**. The Apply wealth capacity formula screen appears.
2. To apply the formula to an individual constituent, mark **Individual constituent**. Click the search icon to locate the constituent.
3. To apply the formula to a research group, mark **Research group**. Click the search icon to locate the research group. You can apply a formula only to the groups to which you have access.
4. To apply the formula to a group of records, mark **Selection**. Using the icons in the field, you can search for selection, edit an existing selection, or create a new selection.
5. Click **Save**. The formula is saved and stored on the Wealth Capacity Formula Management page.

Apply Wealth Capacity Formula Screen

From this screen you apply a wealth capacity formula.

Screen Item	Description
Constituent	Select Constituent to apply the formula to an individual constituent. Use the search icon to locate the constituent.
Research group	Select Research group to apply the formula to a research group. Use the search icon to locate the research group. You can apply a formula only to the groups to which you have access.
Selection	Mark Selection to apply the formula to a group of records. You can use the icons in the field to search for an existing selection, edit an existing selection, or create a new selection.

Set Wealth Capacity Formula Default

You can select any formula defined in the system to use as the default for new constituent records. While you can change the default at any time, only one formula can be used as the default.

► Set wealth capacity formula default

1. From the Wealth Capacity Formula Management page, select the formula you want to set as the default and click **Set default**. A confirmation message appears.
2. Click **Yes**.

Note: You can also choose to make a formula the default when adding new formulas or editing existing formulas.

Edit Wealth Capacity Formula

You can edit wealth capacity formulas from the Wealth Capacity Management page. You can edit only the wealth capacity formulas to which you have access.

► Edit a wealth capacity formula

1. From the Wealth Capacity Formula Management page, select the formula you want to edit and click **Edit**. The Edit wealth capacity formula screen appears.
2. Enter the necessary information.

The fields and options included on the Edit wealth capacity formula screen are the same as those included on the Add wealth capacity formula screen. For an explanation of the fields and options included on these screens, see [Add Wealth Capacity Formula Screen on page 20](#).

3. Click **Save**. The formula is saved and stored on the Wealth Capacity Formula Management page.

Delete Wealth Capacity Formula

You can delete wealth capacity formulas from the Wealth Capacity Management page. However, you can delete only those formulas to which you have access, and the default formula cannot be deleted. Formulas currently assigned to prospect records cannot be deleted.

► Delete a wealth capacity formula

1. From the Wealth Capacity Formula Management page, select the formula you want to delete and click **Delete**. A confirmation message appears.
2. Click **Yes** to delete the formula.

Stewardship Plan Templates

Before you define a stewardship plan for a constituent, you can create stewardship templates from prospects. These templates include basic steps, such as meetings or phone calls, stewards perform to strengthen and retain your organization's relationship with selected donors. With a template, you can add multiple, related steps to a plan at one time. After you add template steps to a stewardship plan, you can edit these steps, add new template steps, or manually create steps to design a custom plan for the constituent.

View Templates

From *Prospects*, click **Stewardship plan templates** under **Configuration** in the explorer bar to access the Stewardship Plan Templates page. Select a template to view the plan's steps in the **Details** grid.

Add Stewardship Templates

After you add a template, you can import the template steps into the **Planned and pending steps** grid on the Details tab of the Stewardship Plan page.

► Add a template

1. Under **Configuration** in *Prospects*, click **Stewardship plan templates**. The Stewardship Plan Templates page appears.
2. Click **Add**. The Add stewardship plan template screen appears.

Add stewardship plan template

Template name:

Category	Objective	Date option	Days from start	Target date	Locked	Contact method	Frequency
Cultivation	Phone call to potent	Days from start	1		<input type="checkbox"/>	Phone call	Single Occurrence
Cultivation	luncheon with facult	Days from start	5		<input type="checkbox"/>	Meeting	Single Occurrence
Solicitation	lunch meeting to soli	Days from start	10		<input type="checkbox"/>	Meeting	Single Occurrence
Acknowledgement	dinner in honor of th	Days from start	15		<input type="checkbox"/>	Event	Single Occurrence
*		Days from start	0		<input type="checkbox"/>		Single Occurrence

3. Enter the necessary information. For a detailed explanation of the options on this screen, see [Add Stewardship Plan Template Screen](#) on page 23.
4. Click **Save**. You return to the Stewardship Plan Templates page.

Add Stewardship Plan Template Screen

Screen Item	Description
Template name	Enter a unique name for the template.

Screen Item	Description
Site	You can select one or more sites to associate with the stewardship plan template. Templates can be used by users in those sites. The site of the stewardship plan template does not impact the site of the stewardship plan.
Category	Enter a category for the step.
Objective	Enter the reason your organization or a steward should perform this step.
Date option	Select “Days from start” to enable the Days from start field or select “Specific date” to enable the Target date field.
Days from start	The start date is the day you add the template step to a stewardship plan. In Days from start , enter the number of days after the start date for the step to occur. For example, to have a steward contact the donor two days after you add this step to the donor’s stewardship plan, enter “2.” The program calculates the calendar date for the step to occur based on the date you add the step to a plan and the number of days you enter in Days from start .
Target date	Select the date the step should occur from the calendar.
Locked	Select to disable date fields for the step. When you move dates forward or backward in the Adjust expected dates fields on a stewardship plan, locked dates do not change. Use this option for steps associated with a fixed date, such as an event. Clear the checkbox to unlock the date.
Contact method	Enter how you intend to contact the constituent for this step.
Frequency	Select how often the step occurs.

Edit External Properties and Businesses URL

If you need to change the database used to search for prospect wealth information, you can do so from the Find External Properties and Businesses page.

Edit Number of External Properties and Businesses Saved

When you perform an External Properties and Businesses search, to help with speed, we save the search parameters and the summary data returned. By default the application saves the last 100 searches, stored on the Find External Properties and Businesses History page. If you want to change the default number, you can from the Find External Properties and Businesses page.

► Change the number of External Properties and Businesses search saved

1. From the Prospects page, click **Find External Properties and Businesses**. The Find External Properties and Businesses page appears.
2. Under **Configuration**, click **Edit configuration**. The Edit configuration screen appears.
3. In the **Saved searches per user** field, enter the number of searches you want saved to the External Properties and Businesses History page.
4. Click **Save** to save your changes.

Social Media Services

To build relationships and learn more about your constituents, you can track their accounts for social media services, such as *Flickr* or *Twitter*, and social networking services, such as *Facebook*, *Google+* or *LinkedIn*.

For example, if a volunteer blogs or Tweets, you can link to his social media account, so you can follow his media posts and encourage him to write about his support for your organization. For information about how to manage social media accounts on a constituent's record, see [Manage Constituent Social Media](#) on page 1.



By default, *Blackbaud* configures *Facebook*, *Flickr*, *Google+*, *LinkedIn*, *Myspace* and *Twitter* services. As new social media and networking activities become popular, you can add and manage them as necessary to track constituent activity online. To access the Social Media Services page from *Constituents*, click **Social media services** under **Configuration**.

► Add a social media service

When constituents join new social media and social networking services, you can add services to track constituents' accounts and add an account to a constituent's record.

1. From *Constituents*, click **Social media services** under **Configuration**. The Social Media Services page appears.
2. Click **Add**. The Add a social media service screen appears.
3. Enter the name of the social media or social networking service.
4. To include an icon for the service, click **Choose file** and browse to and select an image from your computer.

Note: Icons should be 16 pixels by 16 pixels.

5. Click **Save**. You return to the Social Media Services page. By default, the new service is active.

► Edit a social media service

You can edit the name and icon for a social media or social networking service. You cannot edit services configured by *Blackbaud*.

1. From *Constituents*, click **Social media services** under **Configuration**. The Social Media Services page appears.
2. Select the service to edit and click **Edit**. The Edit Social Media Screen appears.
3. Edit the service as necessary.

4. Click **Save**. You return to the Social Media Services page.

► Delete a social media service

If a social media or social networking service closes and no constituent records have accounts with the service, you may want to delete the service. You can not delete services configured by *Blackbaud*.

1. From *Constituents*, click **Social media services** under **Configuration**. The Social Media Services page appears.
2. Select the service to delete and click **Delete**. A message appears to ask whether to delete the service.
3. Click **Yes**. You return to the Social Media Services page.

Prospect Research Report Templates

Prospect Research Report templates allow you to create a template that defines exactly what you want to see in your selected report. You can then point the report to the saved template and generate the output you need.

The Prospect Research Report Templates page is accessed from **Prospects**.

From this page, you can view all existing report templates, add new templates, edit existing templates, copy from an existing template to add a new template, and delete templates. Additionally, you can set which template you want to use as your default.

► Add a prospect research report template

1. From the Prospects page, under **Configuration**, click **Prospect Research Report Templates**. The Prospect Research Report Templates page appears.
2. Click **Add**. The Add prospect research report template screen appears.
3. Enter a name and description for your template.
4. From the **Available sections** pane select, and using the arrow keys, move the selections you want to include in your report to the **Selected sections** pane.
5. Click **Save** to save the template and return to Prospect Research Report Templates page. Your new template displays in the **Report templates** grid. In addition, you can now select this template when creating a **Prospect Research Report**.

► Edit a prospect research report template

1. From the Prospects page, under **Configuration**, click **Prospect Research Report Templates**. The Prospect Research Report Templates page appears.
2. Select the template you want to change.
3. Click **Edit**. The Edit prospect research report template screen appears.
4. Make any necessary changes.
5. Click **Save** to save the template and return to Prospect Research Report Templates page.

► Copy a prospect research report template

1. From the Prospects page, under **Configuration**, click **Prospect Research Report Templates**. The Prospect Research Report Templates page appears.
2. In the **Report templates** grid, select the template you want to copy.

3. Click **Copy**. The Copy prospect research report template screen appears.
4. Change the template name and description.
5. Make any other necessary changes.
6. Click **Save** to save the template and return to Prospect Research Report Templates page. Your new template displays in the **Report templates** grid. In addition, you can now select this template when creating a **Prospect Research Report**.

► **Delete a prospect research report template**

1. From the Prospects page, under **Configuration**, click **Prospect Research Report Templates**. The Prospect Research Report Templates page appears.
2. In the **Report templates** grid, select the template you want to delete.

Warning: You cannot delete system templates.

3. Click **Delete**. A confirmation screen appears.
4. Click **Yes** to delete the selected template.
5. You return to Prospect Research Report Templates page. The deleted template no longer displays in the **Report templates** grid. In addition, you can no longer select this template when creating a **Prospect Research Report**.

► **Set a prospect research report default template**

1. From the Prospects page, under **Configuration**, click **Prospect Research Report Templates**. The Prospect Research Report Templates page appears.
2. In the **Report templates** grid, select the template you want to use as your default.
3. Click **Set my default template**. Your selected template now displays a green checkmark in the **My default template** column of the **Report templates** grid.

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